Nordic customer survey 2022

Report

sentio research

Contents

Introduction

Background

To facilitate their work to develop a harmonized Nordic electricity market NordREG (organization for the Nordic energy regulators) needs insight into the knowledge, attitudes, and experiences of electricity customers in the Nordic countries. To provide such insight, the 2022 Customer Survey has set out a) to explore customers' views and experiences of the four Nordic electricity markets in Denmark, Finland, Norway, and Sweden, including identifying differences and similarities between the four countries, and b) to compare the 2022 results with those of a previous customer survey, which was conducted by Sentio Research on behalf of NordREG in 2018. The resulting knowledge will, among other things, be used to indicate where to put extra effort when developing the national and Nordic retail markets – and to identify differences that might provide opportunities for the countries to learn from each other.

The study was conducted by Sentio Research on behalf of NordREG.

About the report

After the summary, main findings, and descriptions of methods and samples, the rest of the report consists of five individual reports. The first report summarizes the results from the Nordic sample, with a focus on differences and similarities between the four countries, while the next four are country-specific reports that present the overall results for each country and look in detail at the differences between various subgroups.

Differences between 2018 and 2022 are presented throughout the reports, and the reports also all highlight differences and similarities between three customer profiles: *Active* customers, *aware* customers, and *inactive* customers (described in the presentation of the sample, page 21).

Each of the five individual reports follows the same structure as in 2018: i) *presence in the electricity market*; ii) *knowledge of the electricity market*; iii) *participation in the electricity market*; and iv) *attitudes towards the electricity market.*

Executive summary

The results are based on a web survey among a representative sample of 6,036 electricity customers comprising at least 1,500 respondents from each of the countries Denmark, Finland, Norway, and Sweden. All respondents are at least 25 years old, and they all participate in the decision-making regarding their household's electricity contract. This is the second time this survey has been conducted. Results are compared with results from the original survey, which was conducted in 2018.

Customer types

Twenty-seven percent of the Nordic respondents have signed a new electricity contract in the past year – and are referred to as *active* customers. 19 percent have compared contracts in the past year without switching – and are referred to as *aware* customers. Most of the respondents (54%) have neither signed nor compared their electricity contract in the past year; these are referred to as *inactive* customers. Compared with 2018, there are slightly fewer *inactive* customers and slightly more *aware* customers, while the share of *active* customers has not changed significantly.

Compared with *active* and *aware* customers, *inactive customers* have less knowledge about their own electricity consumption and contractual terms – as well as about the electricity market as such. They also pay the least attention to their electricity bill and find it the most difficult to sign an electricity contract.

When results are broken down by age, at least half the respondents in all subgroups are still *inactive* customers. That said, while the share of customers who are *active* is about the same across the age groups, the share of *aware* customers is somewhat higher among respondents under 50 than among older respondents.

When it comes to customer types, the differences between countries are far bigger than the differences between younger and older people. In both 2018 and 2022, the Finns were the most active, followed by the Norwegians, while the Swedes and the Danes were the least active. Since 2018, moreover, the share of customers who are *inactive* has gone down in all countries except for Sweden. The increase in activity is highest in Norway – and less than half the respondents in both Finland and Norway are now *inactive* customers (in 2018, this applied only to Finland).

Other differences between the countries

There is considerable variation in self-reported annual electricity use between the four countries. Norwegians have the highest electricity consumption by far, while the Danes use the least electricity. In between are the Swedes and the Finns, who report quite similar consumption levels. Moreover, Norway is the only country where spot contracts are prevalent, and Norwegians agree the most that it is easy to switch suppliers.

In addition to having the lowest consumption, the Danish customers generally know the least about the electricity market and their own presence in it. The Danes also find it the most difficult to switch supplier, and they are the least inclined to think they can save money by changing their electricity contract. Moreover, considerably fewer Danes say that they have *ever* signed an electricity contract, compared with the others.

Finnish customers generally have the most knowledge about the electricity market. They also agree the most that they can save money by switching contracts, they have the highest trust in information and advice from sellers, and they are the most likely to have used an online comparison tool when they chose their current electricity contract. Compared with the other countries, a considerably higher share of customers in Finland have fixed price.

Citing as a reason for signing a new contract that their previous contract expired is considerably more common in Finland and Sweden than in Denmark and Norway. More Norwegians and Danes say they signed a new contract because of a bad experience with the *previous* contract, compared with the Swedish and Finnish respondents.

Results for each country are presented in detail in the four country reports.

Main differences between 2018 and 2022

Overall, the Nordic respondents appear to be somewhat more engaged in the electricity market than they were four years ago. More respondents say that they have compared electricity contracts within the past year, and the respondents are now inclined to agree that they regularly compare electricity contracts (they were inclined to *disagree* with this in 2018). The share who stayed in their current contact after comparing contracts because there was little or no money to save by switching is a little lower this time around – and there is a small uptick to the share who stayed because their binding period had not expired. On the other hand, the share who signed a new contract in the past three years *because* their previous contract expired is also a bit higher in 2022.

Compared with 2018, the respondents are a little more digitally oriented: They are more inclined to want updated information about their electricity consumption, e.g., online or in an app., higher shares want information from their electricity supplier in an app or on the supplier's website, and more of them used an online comparison tool/did an internet search when choosing their current electricity contract. Moreover, while both the 2018- and the 2022-respondents experienced only to some extent that they were well-informed and that it was easy to compare contracts the last time they signed an electricity contract, average agreement with these statements has increased slightly.

The share of the respondents who say that they do not know their annual electricity consumption is slightly smaller in 2022 than in 2018, and more respondents now say that they are aware of their various contractual terms. Looking at the questions that measure knowledge of the electricity market, however, there are some indications that the Nordic respondents are *less* knowledgeable about the electricity market in 2022 than they were four years earlier.

Age differences

Age differences appear throughout the results. Younger electricity customers generally have the least knowledge of the electricity market and their own contractual terms, and they also find it more difficult to sign contracts and read the least information on their bill.

Negative experiences and complaints

A new addition to the 2022 version of the survey is a set of questions exploring the respondents' negative experiences in the electricity market. The results show that roughly one-in-ten Swedish, Norwegian, and Danish customers, and roughly one-in-twenty customers in Finland, experienced problems with their new electricity supplier after signing their current electricity contract. Such experiences are more common among the younger respondents – ranging from one-in-five under 35 to only one-in-twenty among those who are 50 or older. Compared with the other customer groups, moreover, more of the *aware* customers have experienced problems.

Overall, the most common problems – reported by roughly four-in-ten – were that the price was higher than agreed in the contract or that the contract terms did not match expectations.

Almost four-in-five respondents who experienced a problem made a complaint regarding their problem. Complaining is (also) somewhat more common among the youngest respondents – and least common in Finland. Around three-in four complainers report that the problem got fixed due to their complaint; here there are no differences of note between the countries.

The price shock

Another addition to the questionnaire concerns the extraordinarily high electricity costs. Overall, and as of the time when the survey was fielded (May/June 2022), the respondents say that the high prices have affected their household economy to some extent. Norwegian electricity customers are most affected (though there are considerable regional differences), followed by Danish customers – while Swedish and Finnish customers report less impact on their household economy. Moreover, older customers report that their economy has been affected to a lower extent, compared with younger customers, and respondents who live in houses have felt the prices more than those who live in apartments.

In all countries, the high prices have affected the household economy of respondents who have fixed-price contracts less than those who have variable- or spot-price contracts. In Norway, it is those with variable price (19% of the Norwegian respondents) who report to have been affected the most; in the other countries, customers with a spot-price contract report the highest impact. When national subgroups are compared by contract type, note that the prevalence of the different contract types varies widely between the countries. Comparison is further complicated by the fact that the share who do not know their contract type – and are coded out when contract type is used as a background variable – ranges from only three percent in Finland to more than one-in-ten in Denmark (12%).

The respondents broadly agree that the high electricity prices will affect their future choice of electricity contract, and those who have felt the increased prices the most also agree the most that the prices will affect their future contract choices. Moreover, the *active* and *aware* customers tend to agree more strongly than the *inactive* customers. With an average score of 83 on a scale from 0=*fully disagree* to 100=*fully agree*, it is the Finnish electricity customers who agree the most strongly with this. The score is 78 in Norway, 73 in Sweden, and 71 in Denmark.

In Finland, customers with a fixed-price contract (64% of the Finnish respondents) agree the most that the high electricity prices will affect the future choice of electricity contract, and those with variable price (29% of the Finns) agree the least. Norwegian customers who have a variable-price contract (19% of the Norwegians) also agree to a somewhat lower extent that the high prices will affect their future choice of electricity contract, compared to those Norwegians who have a fixed- or a spot-price contract. In Sweden, it is the customers who have a spot-price contract (only 4% of the Swedish respondents) who agree the most that their future choice will be affected by the high prices, while the Danish results show no significant relationships between the respondents' contract type and their level of agreement that the high prices will affect their behavior in the electricity market.

Method

The study is quantitative web survey among a representative sample of 6,036 Nordic electricity customers: At least 1,500 respondents from each of the countries Denmark, Finland, Norway, and Sweden. All respondents are at least 25 years old and have said that they participate in the decision-making regarding the electricity contract in their household.

Questionnaire

The main part of the questionnaire was prepared by Sentio and NordREG in 2018. In 2022, the questionnaire was modified to include new questions about customers' negative experiences with the electricity market as well as how their economy and future contract choices are affected by the new price situation. The final questionnaire consisted of approximately 40 questions regarding both current suppliers and contracts, covering themes such as signing and comparing contracts, the use of comparison tools, knowledge of contract terms, billing and information, and general knowledge about the electricity market.

The questionnaire was prepared in English by Sentio and NordREG, and it was translated into Danish, Finnish, Norwegian and Swedish by NordREG. Both the original English questionnaire and the four translated questionnaires are made available in the appendix.

Data collection

The survey was conducted online, among a pre-recruited web panel of respondents willing to participate in various surveys. The survey invitation specified that the survey was about (the signing of) electricity contracts, and that only those who participated in decision-making regarding electricity in their household were eligible to respond. In addition, there were two control questions in the beginning of the survey, which screened out i) those who did not participate in decision-making regarding electricity contracts and ii) those who reported that electricity was included in their rent or that they did not know how they received their bill.

A pilot survey consisting of 394 respondents, approximately 100 from each country, was conducted from 10. to 17. May 2022. After the pilot survey some minor changes in the questionnaire were made, mainly screening adjustments and some added categories.

The main survey was fielded *25. May – 20. June 2022.* In 2018, the survey was fielded *5. – 24. September.*

Sample

The sample consisted of a total of 6,036 respondents – at least 1,500 from each of the four Nordic countries (1,501 from Denmark, 1,515 from Finland, 1,501 from Norway, and 1,519 from Sweden). All respondents were over the age of 25 and stated that they took part in the decision-making regarding the electricity contract in their household.

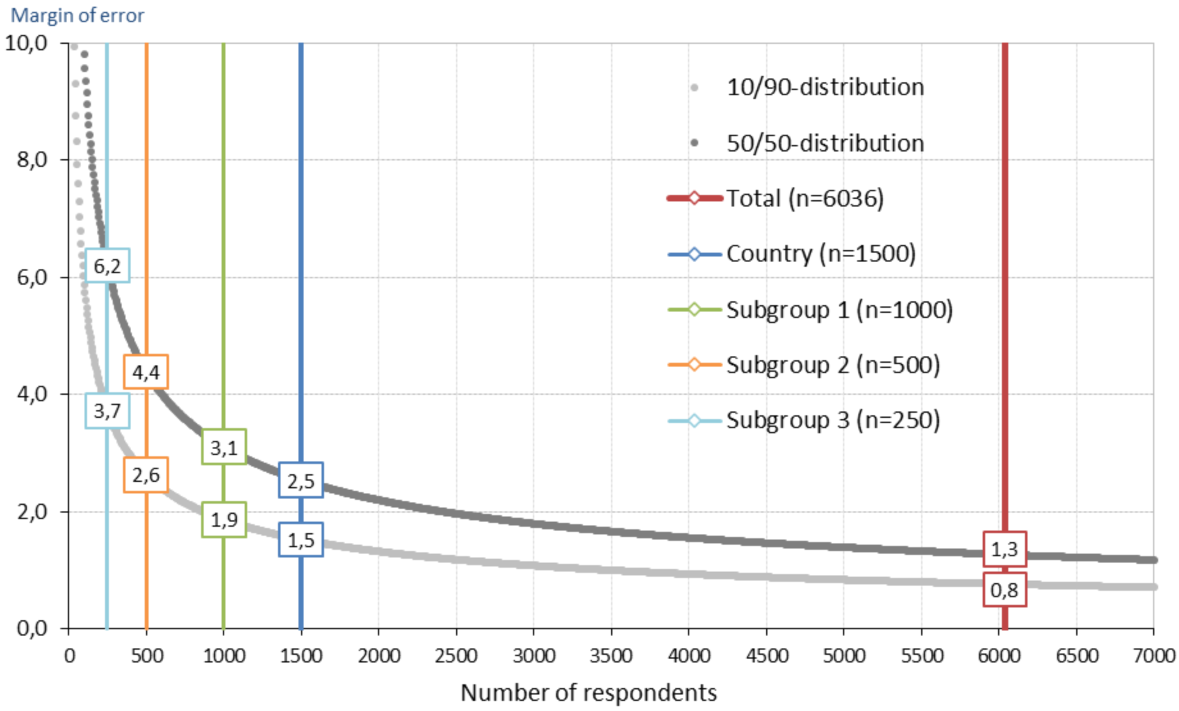
All four country samples were randomly drawn, and they are considered representative for Danish, Finnish, Norwegian and Swedish electricity customers over the age of 25 (with access to the internet). As the exact population of Nordic electricity customers who participate in decision-making regarding their electricity contract is unknown the data is not weighted against population numbers.

Analysis

Margin of error

The margins of error depend on the sample size as well as on the response distribution: The more heterogenous the sample, the larger the margins of error. In this survey the sample consists of 6,036 respondents, and the margins of error vary from +/- 0,8 percentage points (10/90-distribution) to +/- 1,3 percentage points (50/50-distribution). When the results are broken down by subgroups, such as country and other background variables, the margins of error will increase due to the smaller sample size. The figure below shows the margins of error given different sample sizes and different response distributions.

Figure 1: Margins of error.



Average scores

When the respondents were asked to consider different statements, their responses were given on a five-point scale. For instance, respondents were asked to consider whether they disagree or agree with different statements on a scale from “1 = Fully disagree” to “5 = Fully agree”. When presenting the results in this report, the original five-point scale is recoded into scores on a scale from 0 to 100 where, for instance, 0 is the least amount of agreement (“Fully disagree”) and 100 is the highest amount of agreement (“Fully agree”).

The results are generally interpreted according to the table below.

Average scores	Interpretation of results
0-39	- Fully or strongly disagree - Not at all
40-47	- Mostly or broadly disagree - Disagree - Disagree to some extent
48-54	- Neither agree nor disagree - No clear direction - Split/divided
55-64	- Somewhat agree - Tend to agree - Agree to some extent
65-74	Scores under 70: - Moderate agreement - Moderate extent Scores of 70 or higher: - Fair amount of agreement - Fairly high extent
75-84	- Mostly, broadly or generally agree - High extent
85-100	- Strongly or overwhelmingly agree - Very high extent

Significance tests

Whenever possible, the results from 2022 are compared with the results from 2018. Statistically significant differences between 2018 and 2022 are commented on in the report. Interesting and significant differences between subgroups such as customer profiles, age, and residence type are also addressed in the report.

Main findings

Customer profiles

- Twenty-seven percent of the respondents have signed a contract in the past year and are considered *active* customers.
- Nineteen percent have compared contracts in the past year without switching; they are what we call *aware* customers.
- Fifty-four percent have neither switched nor compared contracts in the past year and are considered *inactive* customers.
- The shares of *active* and *aware* customers are highest in Finland and Norway. The share of *inactive* customers is highest in Sweden and Denmark.

Presence in the electricity market

- Four-in-ten Nordic respondents use less than 10,000 kWh per year (39%). More than one-in-four do not know their own annual electricity consumption (27%).
- The Norwegians have the highest electricity consumption by far, while the Danes use the least electricity. Sweden and Finland have similar consumption patterns.
- Four-in-ten Nordic respondents have a fixed-price contract, one-in-three have a variable-price contract, and almost one-in-five have a spot contract (18%). Seven percent do not know their contract type.[1]
    - Spot contracts are only common in Norway (54%). The share is 4–8 percent in the other countries.
    - Fixed-price contracts are most common in Finland (64%) and Denmark (41%), while variable price is most common in Sweden (46%).

Knowledge of the electricity market

- Ninety percent of the respondents identify it as correct that they can choose their own supplier. The share ranges from 86 percent in Sweden to 94 percent in Finland (89% in Norway and 90% in Denmark).
- Fifty-two percent say that if they switch to another supplier, the new supplier will be in charge of reading the meter, and 30 percent say that their electricity supplier is determined by where they live. One-in-ten believe that a change of electricity supplier can affect the number of power cuts (11%), while one-in-five are unsure about this (20%).
    - The latter statement is identified as *incorrect* by 74 percent in Finland, 71 percent in Norway and Denmark, and 60 percent in Sweden.
- Twenty-one percent of the Nordic respondents know only the name of their own electricity supplier. 16 percent also know the name of one other supplier, while 44 percent know both their own supplier and *two* other suppliers.
    - Fifty-five percent of the Finnish customers and 52 percent of the Swedish customers can name three different electricity suppliers. In Norway, that share is 44 percent, while only 23 percent of the Danish customers are able to name three electricity suppliers.
- Seven percent of the Nordic respondents correctly name their grid company and *one* electricity supplier, and 7 percent name their grid company and *two* electricity suppliers. 27

[1] Note that as this is self-reported information it may diverge considerably from information about contract types gathered by other means.

percent know both their grid company, their own electricity supplier, and *two other* electricity suppliers.

  - Forty-five percent of the Swedish customers, and 40 percent of the Finns, correctly name their grid company and three electricity suppliers. The same goes for 21 percent of the Norwegians – and only four percent of the Danes.

- The *inactive* customers are consistently more unsure than the *active* and *aware* customers and knowledge about the different aspects of the electricity market generally increases with age. Moreover, (the minority of) respondents with a spot contract tend to be more knowledgeable than those with other contract types.

Participation in the electricity market

Signing and comparing contracts

- Seventy-nine percent of the Nordic respondents have (ever) signed a contract with an electricity supplier. 17 percent have not done so, and four percent are unsure.
  - The share is highest in Finland (88%) and lowest in Denmark (63%). 85 percent of the Norwegian respondents, and 81 percent of the Swedes, have signed an electricity contract.
- The Finnish and Norwegian respondents have the most recent contract-signing experiences: The share who signed during the past 12 months is 40 percent in Finland and 37 percent in Norway. 32 percent of the Danish customers, and one-quarter of the Swedish customers (25%), signed a new electricity contract in the past year.
- Forty-four percent say that they signed a new contract to save money. Twenty-six percent signed a new contract because their previous contract expired, and 18 percent signed due to a change in their life situation.
  - There is considerable variation in the share of customers who signed a new contract because their previous contract expired – from 43 percent in Finland and 36 percent in Sweden to 10 percent in Denmark and nine percent in Norway.
- Fourteen percent of the Norwegians signed a new contract because of a bad experience with their previous contract. This share is 11 percent in Denmark – and only five percent in Sweden and Finland.
- Fifty-five percent of customers who have *not* signed a new contract in the past 12 months have at some point compared their current electricity contract to other contracts, while 42 percent have never done so. Three percent are unsure.
  - The share of respondents who have compared contracts is highest in Finland (65%) and lowest in Denmark (42%). In both Norway and Sweden, 57 percent have compared their current electricity contract to other contracts.
- Forty-eight percent of those who compared, but did not switch, decided to stay in their current contract because they were satisfied with the contract. 37 percent decided to stay because there was little or no money to save by switching.
- The largest share of respondents in all four countries decided to keep their current contract because they were satisfied with it (44–51%).
  - The share increases with age.
- "There was little or no saving from switching" is the second-most common answer in all four countries.

    - More respondents in Norway (45%) and Denmark (43%) say that there was little or no money to save from switching, compared to Finnish and Swedish respondents (31% and 30%, respectively).
- The largest share of those who have *never* switched or compared contracts also say that this is because they are satisfied with their current contract. The second-most common reason is that it is difficult to understand the differences between the contracts. In Norway, this is tied with the share who say that there is little or no saving from switching.

The contract-signing process

Approximately two-thirds of the Nordic respondents initiated the signing of their current contract themselves, while 12 percent say that the signing was initiated by someone else in their household. 10 percent say that the signing was initiated by the supplier or its sales representatives.

- The share whose contract was initiated by the supplier, or its sales representatives, is highest in Finland (12%), and lowest in Sweden (8%).
- The share who initiated their current contract themselves is highest among the *active* customers, 77 percent, compared to 70 percent among the *aware* and 59 percent among the *inactive* customers. *Inactive* customers are the most unsure (11%, compared to 0–2%).
- Younger respondents are less likely than older ones to have initiated the signing themselves.
- Thirty-seven percent of those whose current contract was initiated by the respondent or by someone in their household used a comparison tool online when choosing the electricity contract. 23 percent did an internet search, 15 percent called one or several suppliers, and 13 percent followed a recommendation.
    - Forty-seven percent in Finland, 39 percent in Sweden, and 35 percent in Norway used an online comparison tool. In Denmark, only 22 percent did.
    - The *aware* and *active* customers used online comparison tools and internet searches to a larger extent than the *inactive* customers did.
- On average, the Nordic respondents experienced to a high extent that it was easy and straightforward to sign their current electricity contract (average score 78 out of 100). They experienced to a moderate extent that they were well-informed (66) and to some extent that they trusted the information and advice from sellers (64) and that it was easy to find trustworthy information and necessary advice (64) – among other things.
    - The Danish respondents score lower for "I was well-informed" (59), compared with respondents from other countries (67–69).
    - Trust in information and advice from the sellers was highest in Finland, with a score of 70, and lowest in Denmark, at 58. The score was 64 in Norway and 61 in Sweden.
    - In general, scores are higher among the *active* and *aware* customers than among the *inactive* customers.

Comparison tools

- Fifty-one percent of the Nordic respondents who signed a new electricity contract in the past three years visited an online comparison tool when they signed their current contract. Compared with 2018, this is an increase of four percentage points.
    - Small majorities in both Sweden (55%), Finland (54%), and Norway (51%) say that they visited an online comparison tool, compared to almost four-in-ten respondents in Denmark (38%).

    - *Aware* customers used online comparison tools the most (68%), and *inactive* customers, the least (39%). The use of comparison tools decreases slightly with age (from 56% among respondents under 35 to 47% of the 65-or-older).
- Thirty-five percent of the Nordic respondents who had *not* signed a new contract in the last three years say that they *know of* an online comparison tool.
    - This is true of considerably fewer Danish respondents (21%), compared with respondents from Sweden (46%), Norway (40%), and Finland (38%).

Contract terms

- Three-in-four Nordic respondents are aware of their contract's binding period (75%), and seven-in-ten are aware of whether the price can change during the contract term (71%). 67 percent are aware of their contract's notice period, while 61 percent are aware of the effective unit rate. Slightly more than one-half are aware of the consequence of terminating the contract before the binding period expires (54%) and whether the contract is green (53%).
    - The Danish customers are generally the least aware of their contractual terms.
    - *Aware* and *active* customers are generally more familiar with the different terms of their contract than *inactive* customers are.
    - Those with the highest annual electricity consumption (more than 20,000 kWh) tend to be a little more aware of their contract terms than others.

Negative experiences and complaints

- Ten percent of the respondents who have (ever) signed an electricity contract experienced problems with their new supplier after signing their *current* contract.
    - Twelve percent of the Norwegian respondents, 11 percent of the Swedish and Danish respondents, and only six percent of the Finnish respondents experienced problems after signing their current contract.
    - Twenty-two percent of respondents under 35 years old and 12 percent of those aged 35–49 experienced problems, compared with only five percent of 50–64-year-olds and four percent of those who are 65 years old or older.
- Seventy-seven percent of the respondents who experienced problems with their new contract made a complaint regarding their problem.
    - Three-in-four say that the problem got fixed due to their complaint (75%).
    - Younger respondents were more satisfied with the outcome of their complaint, compared with older respondents (the average score ranges from 63 to 48).

Attitudes towards the electricity market

- The Nordic respondents agree to a moderate extent that it is easy to switch suppliers (average score 73) and that they can save money by switching contracts (67). They also agree somewhat that it is important to have a green electricity contract (60), while they are split on whether they regularly compare contracts (52).
- The score for "It is easy to switch suppliers" is highest in Norway (81) and lowest in Sweden (68). In Finland, the score is 74, and in Denmark, 71. Denmark has the lowest score for "I can save money by switching electricity contracts" (57, compared to 68 in Norway, 69 in Sweden, and 73 in Finland). On the other hand, Danish customers care the most about having a green contract (66, compared to 58-59 among the others).
- Younger respondents generally agree more that they can save money by switching contracts and that it is important to have a green electricity contract.

Billing and information

- Eighty-four percent of the Nordic respondents receive their bill electronically, while 15 percent get a paper bill.
  - The share of customers who (still) receive their bills on paper is highest in Finland (28%), and lowest in Norway and Denmark (7–6%). In Sweden, the share is 18 percent.
- Finnish and Norwegian customers were presented with the statement, "I would prefer to get all my electricity costs on one bill instead of two separate bills from the supplier and the grid company", and they expressed a high extent of agreement with this (79).
  - The Norwegians agreed somewhat more strongly than the Finns: Average scores were 82 and 76, respectively.
- When asked about billing and information, the Nordic respondents express a fair amount of agreement that they would like to be better informed about the price they pay for electricity, that their bill is easy to understand, and that they want to get updated information about their own consumption, e.g., online or in an app (average scores from 71 to 66).
  - Danes clearly agree *the least* that their bill is simple and easy to understand (55, compared with 67 in Sweden, 70 in Norway, and 74 in Finland), while Danish and Norwegian customers agree the most that they would like to be better informed about their electricity price (73 in Denmark, 70 in Norway, 67 in Sweden, and 63 in Finland).
- Younger respondents agree more that they would like to be better informed about the price they pay for electricity.
- Eighty-one percent say that they read the information presented on their electricity bill.
  - In Finland and Norway, 86 percent read their electricity bill. The share is somewhat lower in Sweden (78%) and in Denmark (74%).
  - Larger shares of the *aware* (90%) and *active* customers (89%) read their electricity bill, compared with the *inactive* customers (74%).
  - The share increases somewhat with age, ranging from 77 percent of respondents under 35 to 86 percent of respondents who are 65 or older.
- As for what customers read on their bill, 96 percent look at the total amount they are due, 90 percent look at the specification of their electricity consumption, and 85 percent look at the specification of the different price elements of their bill. 69 percent look at their estimated yearly consumption and/or their historical consumption, and 61 percent look for notifications of changes that affect the price. Between 41 and 32 percent look at the date

when their contract expires, information about how the electricity is produced, and information about where to turn for advice, dispute resolution, or complaints.

- Compared with the others, Norwegian respondents are more interested in their historical consumption (79%, compared to 62–68%). More Finnish respondents read their contract's expiration date (49%, compared to 33–43%), and Swedish respondents are the most inclined to look at information about how their electricity is produced (41%, compared to 27–37%).
- In general, *active* and *aware* customers pay more attention to their electricity bill than *inactive* customers do.
- The share decreases with age when it comes to information about where to turn for independent user advice, dispute resolution, or with complaints. For all other items of information readership shares increase with age.

Preferred information channels

- Fifty-eight percent of the Nordic respondents prefer to get information from their electricity supplier via e-mail, and 35 percent want information to be delivered on, or attached to, their bill. 32 percent prefer "My pages" on their supplier's website. Twenty-one percent want information in an app provided by their supplier, and 13 percent prefer a separate letter and/or want information by SMS. Only three percent would prefer to get information from their electricity supplier on a display in their house.
- Email is preferred by a majority of the respondents in all the countries: 52 percent in Sweden, 59 percent in both Denmark and Norway, and 63 percent in Finland.
- Twenty-one percent of the Finnish customers want information in a separate letter. This is preferred by 15 percent of the Swedes, and only seven percent of the Norwegian and Danish customers.
- Conversely, the share who want information at "My pages" on their supplier's website is lower in Finland (25%) than in the other three countries (33–35%).
- More Norwegian customers want information in an app provided by their supplier (30%), especially compared with the Swedish (17%) and Finnish (15%) customers. In Denmark, 23 percent would prefer an app.
- Customers with a paper bill are more inclined to want information on, or attached to, their bill (47%, compared with 32% of customers with an electronic bill) or in a separate letter (30%, compared with 10%). They are less inclined to want information via e-mail (43% to 61%), "My pages" (22% to 34%) or an app (11% to 23%).
- *Inactive* customers are less interested in getting information in an app (16%), compared to *active* and *aware* customers (26–28%).

Reactions to high electricity prices

- In May/June 2022, when the survey was fielded, the Nordic respondents had to some extent experienced that the high electricity prices affected their household economy (average score 55). Norwegian (62) and Danish (58) customers reported more impact than the Swedish (50) and Finnish (49) customers did.
  - Older customers were less affected than younger customers, and those who live in an apartment were less affected than those who live in a house.
- The respondents expressed a high level of agreement that the high electricity prices will affect their future choice of electricity contract (average score 76). This score is highest in Finland (83). In Norway, the score is 78, while it is lower in Sweden (73) and in Denmark (71).
  - The score increases with annual kWh use.

Notable differences between 2018 and 2022

Customer types

- Compared with 2018, the 2022 sample has fewer *inactive* customers (decrease from 58% to 54%) and more *aware* customers (increase from 16% to 19%).
- The share of customers who have been *inactive* in the past year has gone down in Norway, Finland, and Denmark – but not in Sweden (60% in 2018 and 63% in 2022). The reduction is biggest in Norway – where 55 percent were *inactive* customers in 2018, and 46 percent were *inactive* customers in 2022.

Electricity use

- The share of the respondents who say that they do not know their annual electricity consumption is slightly smaller in 2022 (27%) than in 2018 (30%). The share who use less than 5,000 kWh per year has increased correspondingly (from 19% to 22%).

Signing and comparing contracts

- The share of respondents signing a new contract in the past three years who did so because their previous contract expired has increased from 22 percent in 2018 to 26 percent in 2022. Conversely, fewer signed because they were approached by a salesperson (down from 16% in 2018 to 11% in 2022).
- Respondents who have not signed a new contract in the past year were asked if they have ever compared their current contract to other contracts – with a follow-up question on when they last did this. Compared with 2018, more respondents had compared contracts during the past 12 months (up from 39% in 2018 to 47% in 2022), while significantly fewer compared contracts 1–3 years ago (down from 46% to 38%).
- Among those who compared their contract, but did not switch contracts, the share who stayed in their current contract because there was little or no money to save by switching is five percentage points lower in 2022 (37%) than it was in 2018 (42%). There is an increase of four percentage points in the share who stayed because their binding period had not expired (15%; up from 11%).
- In 2018, the Nordic respondents mostly disagreed with the statement “regularly compare electricity contracts” (average score 46 on a scale from 0=fully disagree to 100=fully agree). In 2022, they are about evenly split (average score 52).
- While both the 2018- and the 2022-respondents experienced to some extent that they were well-informed and that it was easy to compare contracts the last time they signed an electricity contract, average scores for the statements have increased slightly: From 63 to 66 for “I was well-informed” and from 61 to 63 for “I could easily compare different electricity contracts with each other”.
- When choosing their current electricity contract, more respondents did an internet search in 2022 (23%; up from 16% in 2018).

Knowledge of the electricity market

- While results are broadly similar in 2018 and 2022, there are some indications that the respondents are *less* knowledgeable about the electricity market in 2022 than they were four years earlier. For example:

- While most respondents know that they can choose their electricity supplier, the share who believe that their supplier is determined by where they live is five percentage points higher in 2022 than in 2018 (increase from 25% to 30%). The share is highest in Norway (41%) and lowest in Finland (20%).
- In 2022, 45 percent of the Nordic respondents know the name of their grid company. This share has decreased by eight percentage points (53% in 2018).[2]
- Compared with 2018, a somewhat lower share could name an actual electricity supplier when asked to name their own supplier (81%; down from 84%), and a somewhat higher share say that they do not know the name of their own electricity supplier (14%; up from 10%).

Awareness of contractual terms

- Compared with 2018, significantly more respondents say in 2022 that they are aware of their contract's binding and notice periods, whether the price can change during the contract term, the consequence if they terminate the contract before the binding period expires, and whether the contract is green (differences of 3–7 percentage points).
- When asked what information they look at on their electricity bill, there is a seven-point increase in the share who look at the date when their contract expires (from 34% to 41%).

Billing and information

- In 2018, 23 percent of the Nordic respondents received their electricity bill as a paper invoice by mail. This share is down to 15 percent in 2022.
- Respondents have become a little more enthusiastic about access to updated consumption information: The statement "I would like to get updated information about my consumption (e.g., online or in an app)" scores significantly higher in 2022 (71) than in 2018 (67).

Preferred information channels

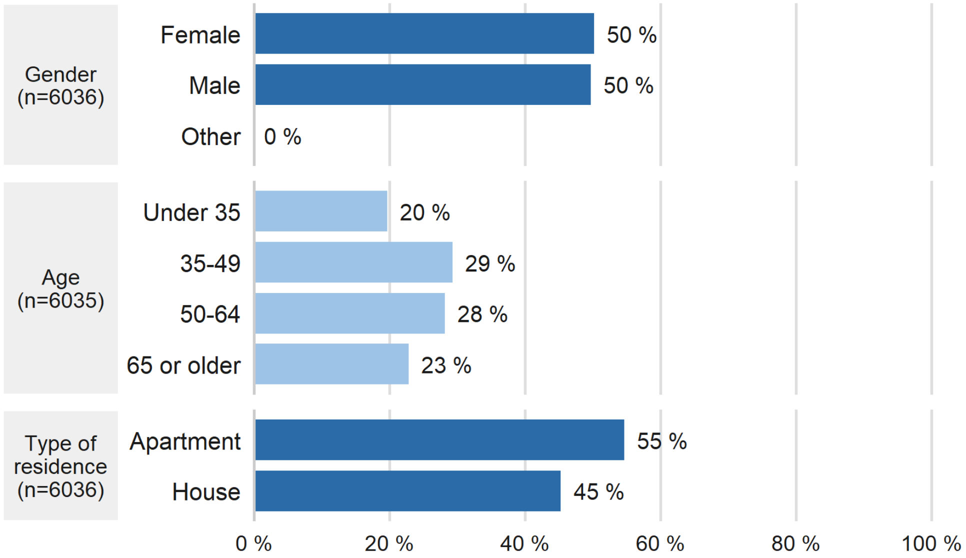
- On the question of how the respondents would prefer to get information from their electricity supplier, the largest change from 2018 to 2022 is for the option "in an app provided by my supplier" – which is up nine percentage points (from 12 percent in 2018 to 21 percent in 2022). There is also an increase for "My pages" on my supplier's website" (from 28% to 32%), while shares have *decreased* for the options "on or attached to my bill" (from 40% to 35%) and "in a separate letter" (from 17% to 13%).

[2] Note that many grid companies have changed their name in recent years.

Presentation of the samples

The chapter describes the composition of the sample as regards gender, age, and residence type. A brief description of the 2018 sample is also included.

Figure 2: Composition of the sample as regards gender, age, and residence type.



Fifty percent of the Nordic respondents are women, and 50 percent are men. 20 percent are between the ages of 25 and 34; 29 percent, between the ages of 35 and 49; 28 percent are aged 50–64; and 23 percent are 65 or older. 55 percent of the respondents live in an apartment, and 45 percent live in a house.

- The Danish respondents are 50 percent women and 50 percent men. 17 percent are 34 years old or younger; 29 percent, 35–49; 31 percent, 50–64; and 24 percent, 65 or older. 41 percent live in an apartment, and 59 percent live in a house.
- The Finnish respondents are 50 percent women and 50 percent men. 20 percent are 34 years old or younger; 28 percent, 35–49; 27 percent, 50–64; and 25 percent, 65 or older. 70 percent live in an apartment, and 30 percent live in a house.
- The Norwegian respondents are 50 percent women and 50 percent men. 21 percent are 34 years old or younger; 32 percent, 35–49; 28 percent, 50–64; and 20 percent, 65 or older. 49 percent live in an apartment, and 51 percent live in a house.
- The Swedish respondents are 50 percent women and 49 percent men.[3] 21 percent are 34 years old or younger; 29 percent, 35–49; 27 percent, 50–64; and 23 percent, 65 or older. 58 percent live in an apartment, and 42 percent live in a house.

In the 2018 sample, 17 percent were under the age of 35; 30 percent, between the ages of 35 and 49; 29 percent, 50–64; and 23 percent, 65 or older. 50 percent of the respondents lived in a house, and 50 percent lived in an apartment.

- In 2018, the Danish sample consisted of 50 percent men and 50 percent women. 17 percent of the Danish respondents were under 35; 28 percent, 35– 49; 32 percent, 50–64; and 23

[3] This is due to rounding: One respondent registered their gender as “other” – and the sample consists of 49,44% men and 50,49% women

percent, 65 or older. Just like in 2022, six-in-ten lived in a house, while four in ten lived in an apartment.

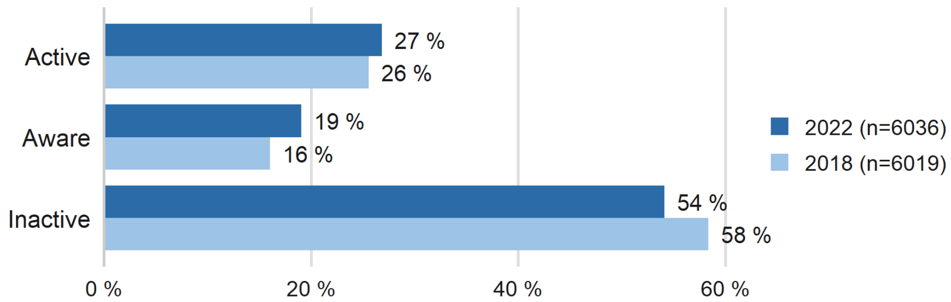
- In 2018, the Finnish sample consisted of 51 percent men and 49 percent women. 17 percent were under 35; 28 percent, 35–49; 32 percent, 50–64; and 23 percent, 65 or older. 65 percent lived in an apartment, and 35 percent lived in a house.
- In 2018, the Norwegians were also 51 percent men and 49 percent women. 16 percent were under 35; 35 percent, 35–49; 27 percent, 50–64; and 21 percent, 65 or older. Six-in-ten lived in a house, and four-in-ten, in an apartment.
- In 2018, the Swedish respondents were 50 percent men; 50 percent women. 19 percent were under 35; 30 percent, 35–49; 26 percent, 50–64; and 25 percent, 65 or older. 55 percent lived in an apartment, while 45 percent lived in a house.

Customer profiles

In the report, we operate with three different *customer profiles*. These are:

- *Active* customers: Respondents who have signed an electricity contract during the last 12 months.
- *Aware* customers: Respondents who have compared contracts but decided not to switch electricity contract during the last 12 months.
- *Inactive* customers: Respondents who have neither switched nor compared contracts during the last 12 months.

Figure 3: Customer profiles.



Twenty-seven percent of the respondents have signed a contract in the past year and are considered *active customers*. 19 percent have compared contracts in the past year without switching – and are what we call *aware customers*. 54 percent have neither switched nor compared contracts in the past year and are *inactive customers*. 27 per cent of the *inactive* customers have *never signed* a new contract, and 56 percent have *never compared* their current contract with other contracts.

Compared with 2018, the overall Nordic sample comprises significantly more *aware* customers (increase from 16% to 19%) and significantly fewer *inactive* customers (decrease from 58% to 54%). The share of *active* customers has not changed significantly (26-27%).

The shares of *active* and *aware* customers are highest in Finland and Norway. The share of *inactive customers* is highest in Sweden and Denmark. This was also the case in 2018.[4]

- In Denmark, 20 percent of the customers are *active*, 15 percent are *aware*, and 65 percent are *inactive*.
- In Finland, 35 percent of the customers are *active*, 22 percent are *aware*, and 43 percent are *inactive*.
- In Norway, 32 percent of the customers are *active*, 23 percent are *aware*, and 46 percent are *inactive*.
- In Sweden, 20 percent of the customers are *active*, 17 percent are *aware*, and 63 percent are *inactive*.

Contract types

This time, we also operate with the background variable "contract type". In 2022, respondents were asked about their current type of electricity contract – and the different options were defined as follows:

- Fixed price (a fixed price per kWh during the entire contract period).
- Variable price (a set price per kWh that follows the electricity market and may be changed every 14 days (Norway) or every month (Sweden/Finland).[5]
- Spot price/hour spot (the price per kWh follows the market price).

Respondents could also say that they have another type of contract or that they do not know their contract type. Very few respondents have other contract types; these have been excluded from further analysis.

Respondents who said, "do not know" are also coded out of the contract-type background variable. This is necessary for meaningful analysis because respondents who do not know are an entirely unknown group, but it does, in some cases, mean that a significant number of respondents are excluded. This also further complicates comparison *between countries* – which is already complicated by the widely different distribution of contract types in the four markets – as the "do not know"-share ranges from only three percent in Finland to more than one-in-ten in Denmark (12%).

For an overview of the prevalence of the different contract types among respondents in the different countries, see "The Nordic respondents' presence in the electricity market" (below).

[4] Sweden 2018: 26 percent *active*; 14 percent *aware*; 60 percent *inactive*. Norway 2018: 26 percent *active*; 19 percent *aware*; 55 percent *inactive*. Finland 2018: 34 percent *active*; 19 percent *aware*; 47 percent *inactive*. Denmark 2018: 16 percent *active*; 13 percent *aware*; 71 percent *inactive*.

[5] The explanatory texts about the alternative "variable price" differed somewhat between the languages: Norwegian respondents were told that it is a "set price that follows the electricity market and may be changed every 14 days" (as of 1. November 2022, the interval is 30 days). In Sweden, the definition said, "the price per kWh is changed once a month and is based on the average spot price", while the Finnish formulation was "the seller may change the price by giving notice at least one month before the change takes effect". The Danish questionnaire did not provide definitions of the contract types.

Differences and similarities between the Nordic countries

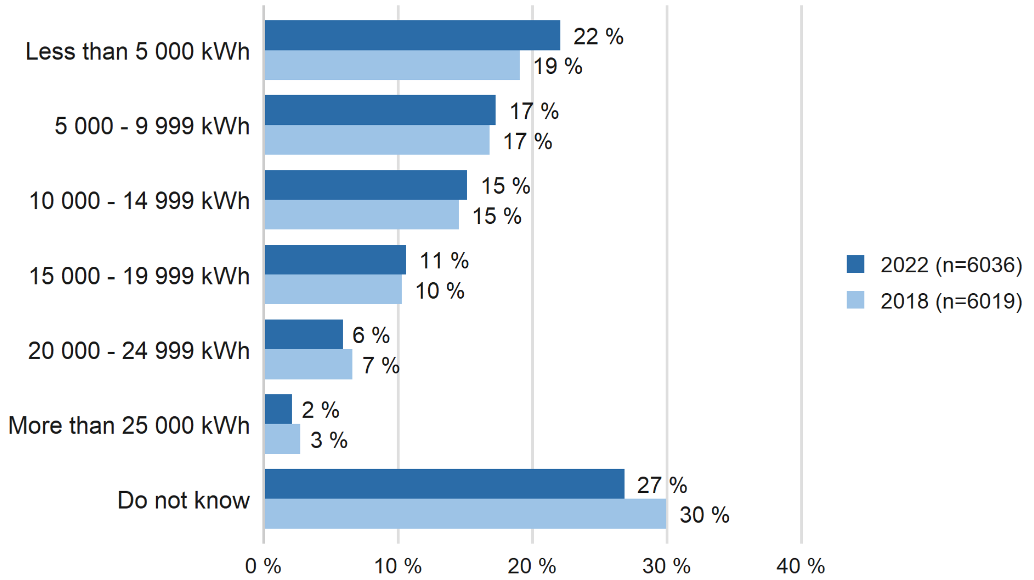
This chapter takes a closer look at the Nordic respondents and their presence and participation in the electricity market as well as their attitudes towards the electricity market. Differences between the four countries are addressed, as are interesting and significant differences between subgroups – such as customer profiles, age, and residence type. When possible, the results are compared with the 2018 results.

Note that some results are presented as *average scores* rather than as percentages. This is done when respondents were asked to respond on a five-point scale – for example, from *1 = Fully disagree* to *5 = Fully agree*. The response values have been recoded so that "fully disagree" is set to 0 and "fully agree" is set to 100, with the other categories coded at equal intervals in between. The average of the recoded responses is then presented as a question's "average score" on a scale from 0 to 100. An overview of how these scores are interpreted is available in the methods section of the report.

The Nordic respondents' presence in the electricity market

The respondents were asked different questions about their presence in the Nordic electricity market.

Figure 4: Approximately how many kilowatt-hours do you use each year?



Eight percent of the respondents report that they use 20,000 kWh or more per year, 26 percent use between 10,000 and 19,999 kWh, and 39 percent use less than 10,000 kWh per year.

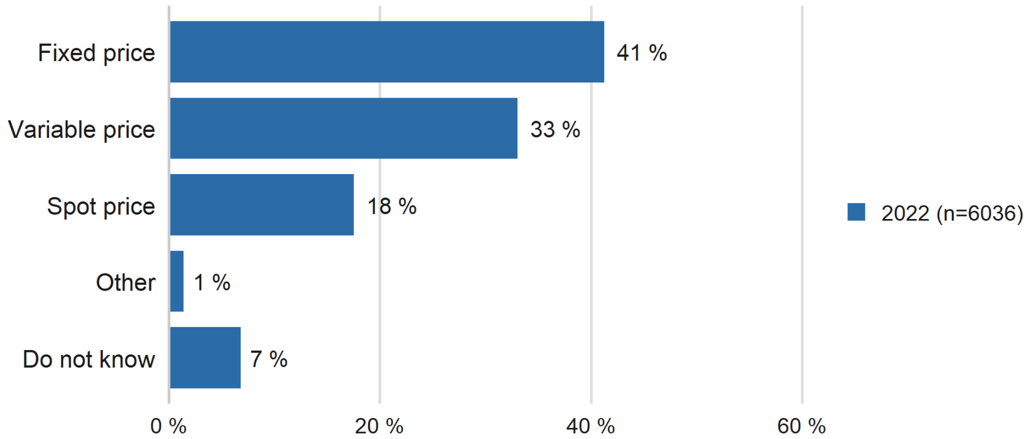
- Norwegians have the highest electricity consumption by far, while the Danes use the least electricity. Sweden and Finland have similar consumption patterns.
- Only 12 percent of the Norwegian respondents use less than 5,000 kWh per year – compared with 31 percent in Sweden, 34 percent in Finland, and 45 percent in Denmark (these are shares of respondents who *know* their annual kWh use).

Twenty-seven percent – more than one-in-four – respond that they *do not know* how much electricity they use in a year. Compared with 2018, there is a small decrease in the share who do not know (from 30% in 2018 to 27% in 2022), while the share who report using less than 5,000 kWh per year has increased equivalently (from 19% in 2018 to 22% in 2022).

- Twenty-four percent in Norway, 25 percent in Finland, 27 percent in Sweden, and 31 percent in Denmark *do not know* how much electricity they consume in a year.

A question about current contract type was added to the questionnaire in 2022.[6]

Figure 5: What kind of electricity contract do you have today?



Forty-one percent of the Nordic respondents say that they have fixed-price contracts (41%), while 33 percent have variable price. 18 percent have spot contracts, one percent have some other type of contract, and seven percent do not know their contract type.[7]

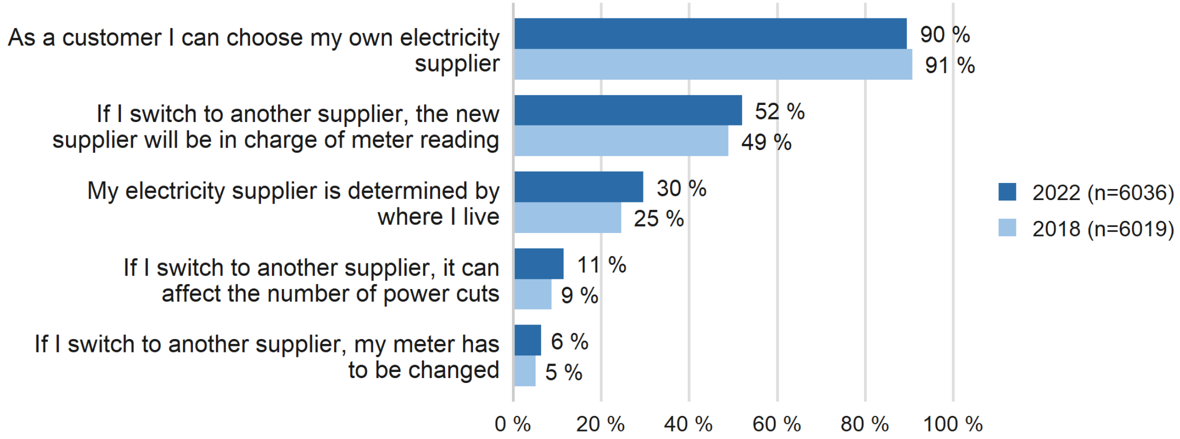
- Fixed-price contracts are most common in Finland (64%), and least common in Norway (19%). 41 percent of the customers in both Sweden and Denmark have fixed price.
- Variable price is the most common contract type in Sweden (46%), while it is the second-most common contract type in Denmark (38%). 29 percent of the Finnish customers, and 19 percent of the Norwegians, have variable-price contracts.
- Norway stands out as the only country where spot contracts are widely used. More than half of the Norwegian customers have spot price (54%), compared with only 4–8 percent in the other countries.
- In Denmark, 12 percent do not know their contract type – compared to 6 percent in Sweden and Norway, and 3 percent in Finland.
- Variable-price contracts are slightly more common among the younger respondents: The share ranges from 36 percent among respondents who are under 35 to 30 percent of those who are 65 or older.
- A higher share of the *active* customers have fixed-price contracts (51%), compared with the *aware* (40%) and *inactive* customers (37%).

[6] The section “Contract types” (p.22) provides more information about this question.
[7] Note that as this is self-reported information it may diverge considerably from information about contract types gathered by other means.

The Nordic respondents' knowledge of the electricity market

The respondents were asked to consider different statements concerning electricity suppliers and the process of switching suppliers.

Figure 6: Do you believe the following statements are correct or not? Shares who believe that the statements are correct.



Nine-in-ten respondents identify it as correct that they can choose their own electricity supplier (90%). Roughly half believe that if they switch to another supplier, the new supplier will be in charge of meter reading (52%), and three-in-ten believe that their electricity supplier is determined by where they live (30%). Finally, one-in-ten believe that switching suppliers can affect the number of power cuts (11%), while six percent think that if they switch suppliers, their meter has to be changed.

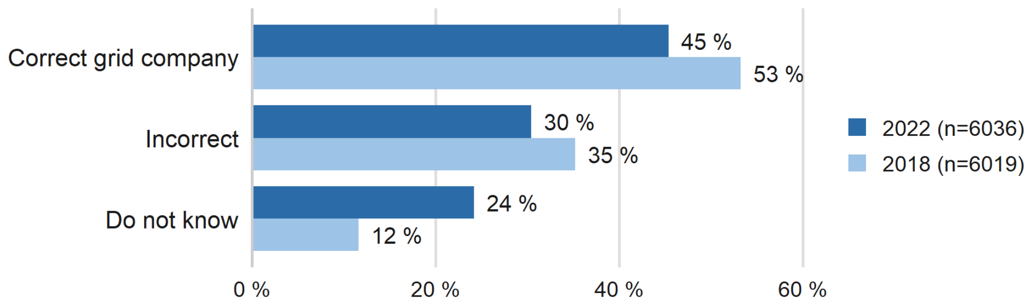
Compared with 2018, there is an increase of five percentage points in the share of the Nordic respondents who believe that their electricity supplier is determined by where they live (25% in 2018 and 30% in 2022) and a seven-point *decrease* in the share who say that this is *incorrect* (67% in 2018 and 60% in 2022). There is also a two-point increase in the share who believe that switching suppliers can affect the number of power cuts, from 9 percent to 11 percent, while the share who believe this to be *incorrect* is five percentage points lower in 2022 than in 2018 (69% and 74%, respectively). For the statement "If I switch to another supplier, the new supplier will be in charge of meter reading", the share who say that this is correct has gone up from 49 percent to 52 percent. One-quarter are unsure (25%).

- The share of respondents who believe that their electricity supplier is determined by where they live is highest in Norway (41%) and lowest in Finland (20%). In Sweden and Denmark, 31 and 27 percent, respectively, believe this.
    - Finland also has the highest share of respondents to identify this as *incorrect* (74%, compared to 50% in Norway, 57% in Sweden, and 61% in Denmark) – and the lowest share of "do not know"-answers (6%, compared to 9–12% in the other countries).
- Around one-half of the Nordic respondents believe that in the event of a change of supplier, the new supplier will be responsible for reading the meter, while one-in-four are unsure.
    - The share of respondents who believe this to be correct is highest in Finland (57%) and lowest in Sweden (49%). In Denmark and Norway, 51 and 52 percent, respectively, believe that the new supplier will be in charge of meter reading.
    - More Swedish respondents answer, "do not know" (33%), compared with respondents in the other Nordic countries (21–25%). The "do not know"-share is lowest in Finland (21%).

- The share of respondents who know that they themselves can choose electricity supplier ranges from 86 percent in Sweden to 94 percent in Finland (89% in Norway and 90% in Denmark).
- Overall, few respondents believe that a change of electricity supplier can affect the number of power cuts (11%), while it is more common to be unsure (20%).
    - In Sweden, 25 percent are unsure of whether the number of power cuts is affected by the electricity supplier. In Denmark, this share is 21 percent, while it is 17 and 16 percent, respectively, in Norway and Finland.
    - The share of respondents who identify the statement as *incorrect* is 74 percent in Finland, 71 percent in Norway and Denmark, and 60 percent in Sweden.
- Few respondents believe that the meter has to be changed when you switch electricity suppliers (only 3–9% in the Nordic countries say that this is correct) – though there is some uncertainty (9–22% answer "do not know").
    - The Finnish respondents are the most certain that the meter doesn't have to be changed (88% say that the statement is incorrect, while 9% do not know), while the Swedes are the least certain (71% say "incorrect" and 22% are unsure). In both Denmark and Norway, around four-in-five identify the statement as incorrect (80% and 79%, respectively).
- Knowledge about the different aspects of the electricity market generally increases with age.
- *Inactive* customers are consistently more unsure than the *active* and *aware* customers.
- Customers with a spot-price contract tend to be more knowledgeable than those with other contracts.

The respondents were asked to name the company that operates the power lines to their home, their own electricity supplier, and two other electricity suppliers.

Figure 7: Name the company that operates the power lines to your home.



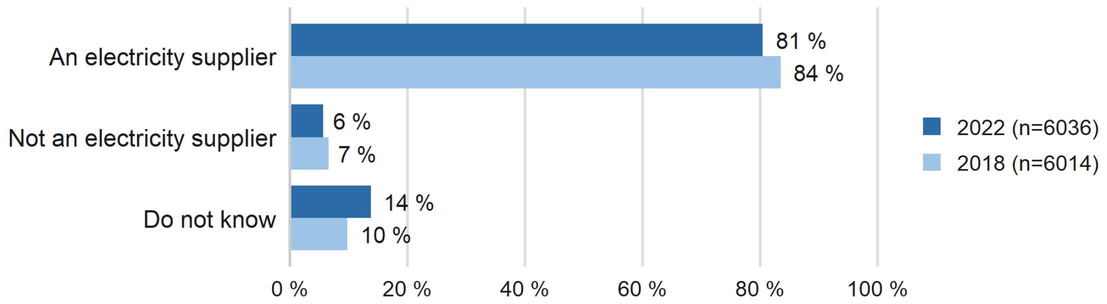
Forty-five percent of the Nordic respondents correctly name their grid company. 30 percent give an incorrect name for their grid company, name another grid company, or name something that is not a grid company. 24 percent *do not know* the name of their grid company.

Compared with 2018, a lower share of the respondents can name their grid company in 2022 (45%; down from 53%). The share who say that they do not know the name of their grid company has doubled (from 12% to 24%).[8]

[8] Note that many grid companies have changed names between 2018 and 2022.

- In Sweden, 72 percent correctly name their grid company, and in Finland, the share is 65 percent. On the other hand, only one-in-three Norwegians (33%) and one-in-ten Danes (10%) know the name of their grid company.
    - Shares of "do not know"-answers are 40 percent in Denmark, 27 percent in Norway, 15 percent in Sweden, and 14 percent in Finland.
- The share of correct answers increases with age: 39 percent of respondents who are under 35, 42 percent of 35–49-year-olds, and 49–51 percent of respondents who are 50 or older, know the name of their grid company.
- A higher share of *active* customers know the name of their grid company (54%), compared to *aware* (48%) and *inactive* customers (40%).

Figure 8: Who is the electricity supplier in your home?



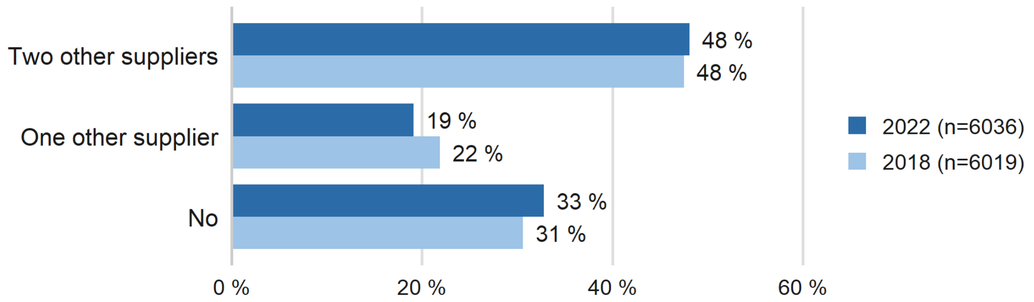
Eighty-one percent of the Nordic electricity customers provide the name of an actual electricity supplier.[9] Six percent name something that is not an electricity supplier. 14 percent say that they *do not know* who their electricity supplier is.

Compared to 2018, somewhat fewer respondents name an actual electricity supplier (81%; down from 84%), while more say they *do not know* who their electricity supplier is (14%; up from 10%).

- Eighty-five percent of the Finnish respondents, 83 percent of the Swedes, and 81 percent of the Norwegians, name an electricity supplier. In Denmark, the share is 72 percent.
    - Twenty-three percent in Denmark, 12 percent in Norway, 11 percent in Sweden, and 9 percent in Finland answer that they do not know their supplier.
- The share of correct answers is highest among respondents who are at least 50 years old (86–87%) and lowest among those under 35 (70%).
- Eighty-eight percent of *active* customers, 80 percent of *aware* customers, and 77 percent of *inactive* customers name an actual electricity supplier.

[9] We cannot know whether this is *their* actual electricity supplier or just some supplier.

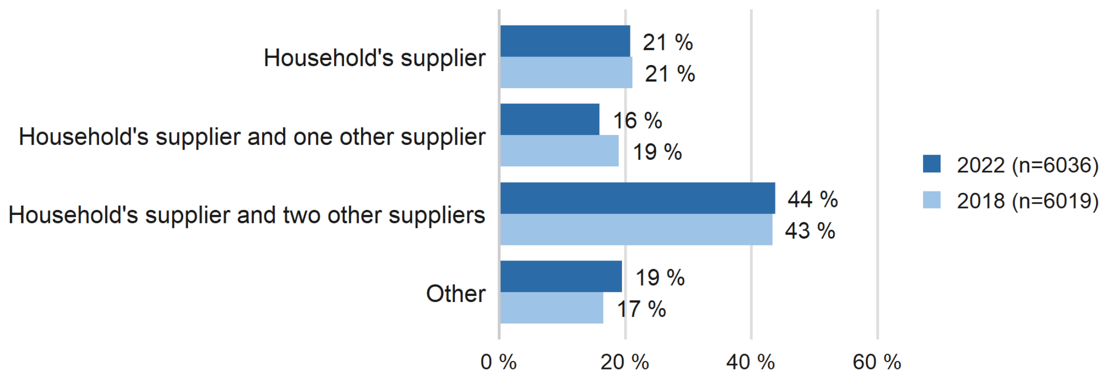
Figure 9: Can you name two other electricity suppliers?



Forty-eight percent know the names of two other electricity suppliers, while 19 percent name one other supplier. 33 percent cannot name any other electricity suppliers. This is about the same as in 2018.

- In Finland, 61 percent name two other suppliers, and in Sweden, the share is 56 percent. 49 percent in Norway, and only 26 percent in Denmark, name two other suppliers.
    - In Denmark, 53 percent cannot name *any* other electricity suppliers. That share is 31 percent in Norway, 28 percent in Sweden, and 18 percent in Finland.
- Forty-one percent of respondents under the age of 35 cannot name any other suppliers, compared to 33–29 percent of those who are older. One-in-two respondents over 50 can name two other suppliers (51–52%).
- Respectively 63 percent and 54 percent of the *active* and *aware* customers name two other electricity suppliers, while only 39 percent of the *inactive* customers do so. 42 percent of the *inactive* customers cannot name any other suppliers (compared to 18% of *active* and 28% of *aware* customers).

Figure 10: Total knowledge of electricity suppliers.



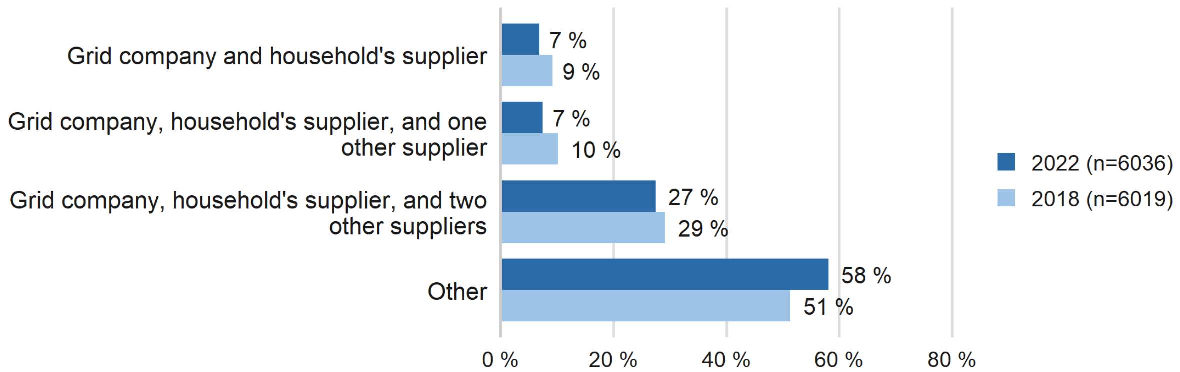
One-in-five Nordic respondents know only their own supplier (21%). 16 percent also know the name of one other supplier, while 44 percent know both their own supplier and two other suppliers. 19 percent answer something other than an actual electricity supplier (a grid company or something else) or say that they do not know. This, too, is about the same as in 2018.

- Fifty-five percent of the Finnish customers, and 52 percent of the Swedish customers, can name three different electricity suppliers. In Norway, that share is 44 percent, while only 23 percent of the Danish customers are able to name three electricity suppliers.
    - The largest share of the Danish customers, 33 percent, know only their household's supplier. Moreover, 28 percent of the Danes answer either only something that is

not an electricity supplier or that they do not know; this share is around 10 percentage points higher in Denmark than in the other countries (15–19%).

- Of the *active* and *aware* customers, 58 and 50 percent, respectively, know the names of three electricity suppliers. This only applies to 35 percent of the *inactive* customers.
- Knowledge of electricity suppliers generally increases with age.

Figure 11: Total knowledge of the electricity market.



Seven percent of the Nordic respondents correctly name the company operating power lines to their home (grid company) and *one* actual electricity supplier, and the same share know their grid company and *two* electricity suppliers (7%). A total of 27 percent know both their grid company, their own electricity supplier, and *two other* electricity suppliers. The "Other"-category in the figure comprises those who have answered something that is not an actual electricity company as their household's supplier, and/or have not correctly named their grid company. This applies to 58 percent of the respondents – an increase from 51 percent in 2018. Compared with 2018, these results indicate a somewhat lower level of knowledge of the electricity market in 2022.[10]

- Forty-five percent of the Swedish customers, and 40 percent of the Finns, can name their grid company and three electricity suppliers. The same goes for 21 percent of the Norwegians – and only four percent of the Danes.
- Significant shares in both Denmark (90%) and Norway (70%) get their grid company wrong and/or cannot correctly name *one* electricity supplier. This applies to 40 percent in Sweden and 32 percent in Finland.
- Thirty-eight percent of *active* customers, 30 percent of *aware* customers, and 21 percent of *inactive* customers can name their grid company and three electricity suppliers.
- While the "other"-share is higher than 50 percent in all age groups (ranging from 65% among respondents under 35 to 52% of those 65 or older), knowledge of the electricity market generally increases with age.

The free-text answers to these questions are available in the appendix.

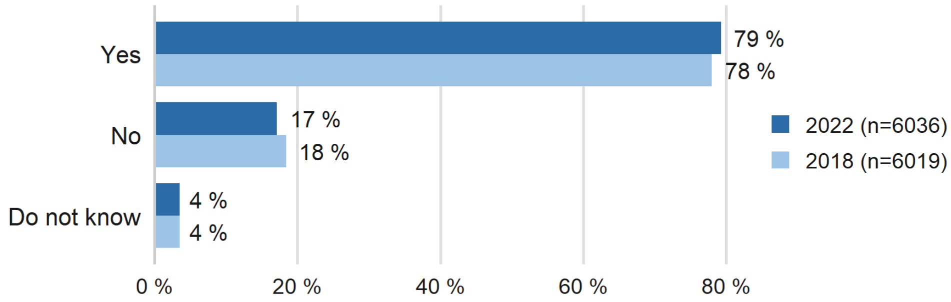
[10] Note that many grid companies have changed names between 2018 and 2022.

The Nordic respondents' participation in the electricity market

The respondents were also asked different questions related to their participation in the electricity market, including signing and comparing electricity contracts, the use of online comparison tools, and knowledge of contractual terms.

Signing and comparing contracts

Figure 12: Have you ever signed a new contract with an electricity supplier?

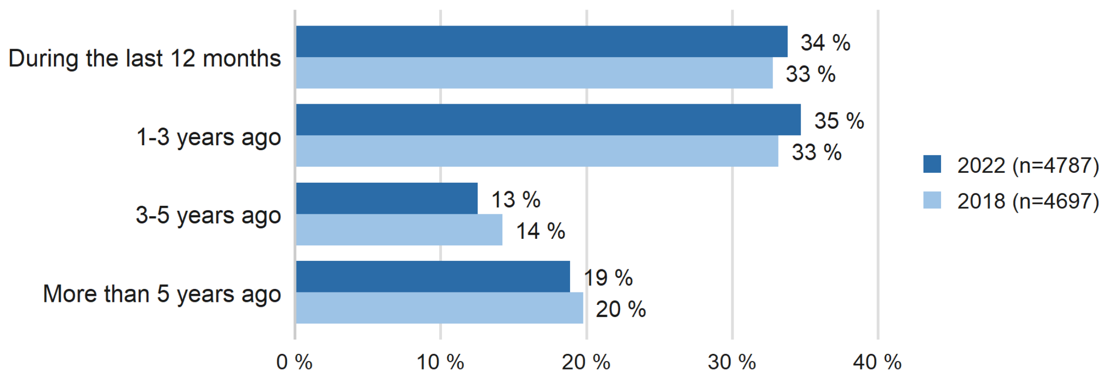


Seventy-nine percent of the Nordic respondents have (ever) signed a contract with an electricity supplier. 17 percent have not done so, and four percent are unsure. This has not changed since 2018.

- The share is highest in Finland (88%), and lowest in Denmark (63%). 85 percent of the Norwegian respondents, and 81 percent of the Swedes, have signed an electricity contract.
- Younger customers are less likely to have signed a contract than older ones: 74 percent of customers under 35 have signed a contract, compared with 78–83 percent in the older age groups (rising with age).
- Nine-in-ten customers with a spot-price contract (90%) and four-in-five of those with other contract types (78–80%) have signed an electricity contract.

Those who have signed a contract with an electricity supplier were asked when they did so last.

Figure 13: When did you last sign a new contract with an electricity supplier? Percent of respondents who have ever signed a contract.



Approximately one-third of those who have (ever) signed an electricity contract last did so less than one year ago and are considered *active* customers (34%). 35 percent signed 1–3 years ago, 13 percent, 3–5 years ago, and 19 percent, more than five years ago.

There are no significant differences between 2018 and 2022.

- The Finnish and Norwegian respondents have the most recent contract-signing experiences: The share who signed during the last 12 months is 40 percent in Finland and 37 percent in

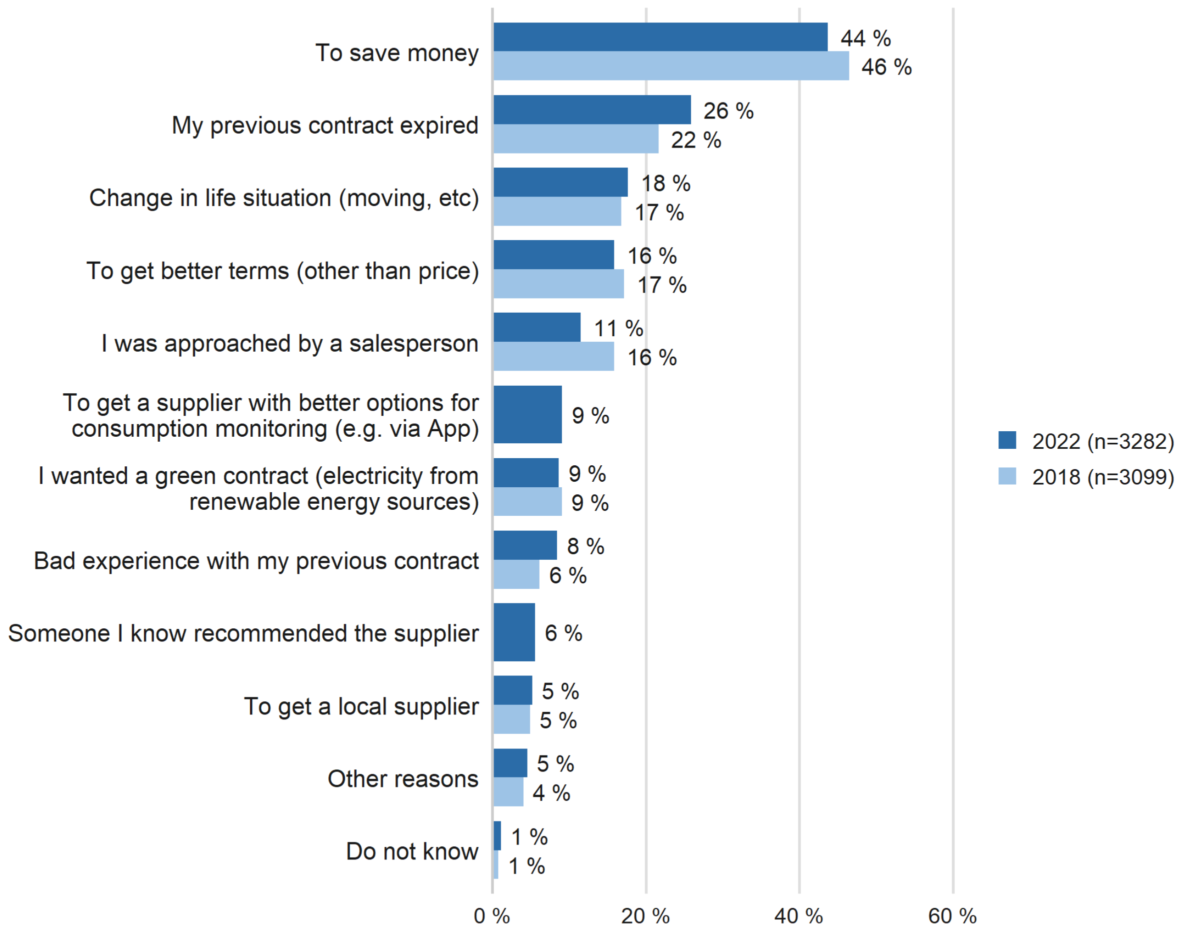
Norway. 32 percent of the Danish customers, and only one-quarter of the Swedish customers (25%), signed a new electricity contract in the past year.

    - Another one-quarter of the Swedish customers last signed a new contract more than five years ago (24%). That share is 19 percent in Denmark, 17 percent in Norway, and 15 percent in Finland.

- More of the respondents under 35 last signed a contract 1–3 years ago (43%), and fewer, more than five years ago (7%), compared with older respondents. In the other age groups, 31–36 percent last signed a contract 1–3 years ago, and 17–25 percent, more than five years ago.

Respondents who had signed a new contract *in the past three years* were also asked *why* they signed a new contract.

Figure 14: Why did you sign a new electricity contract? Multiple answers possible. Respondents who signed a contract in the past three years.



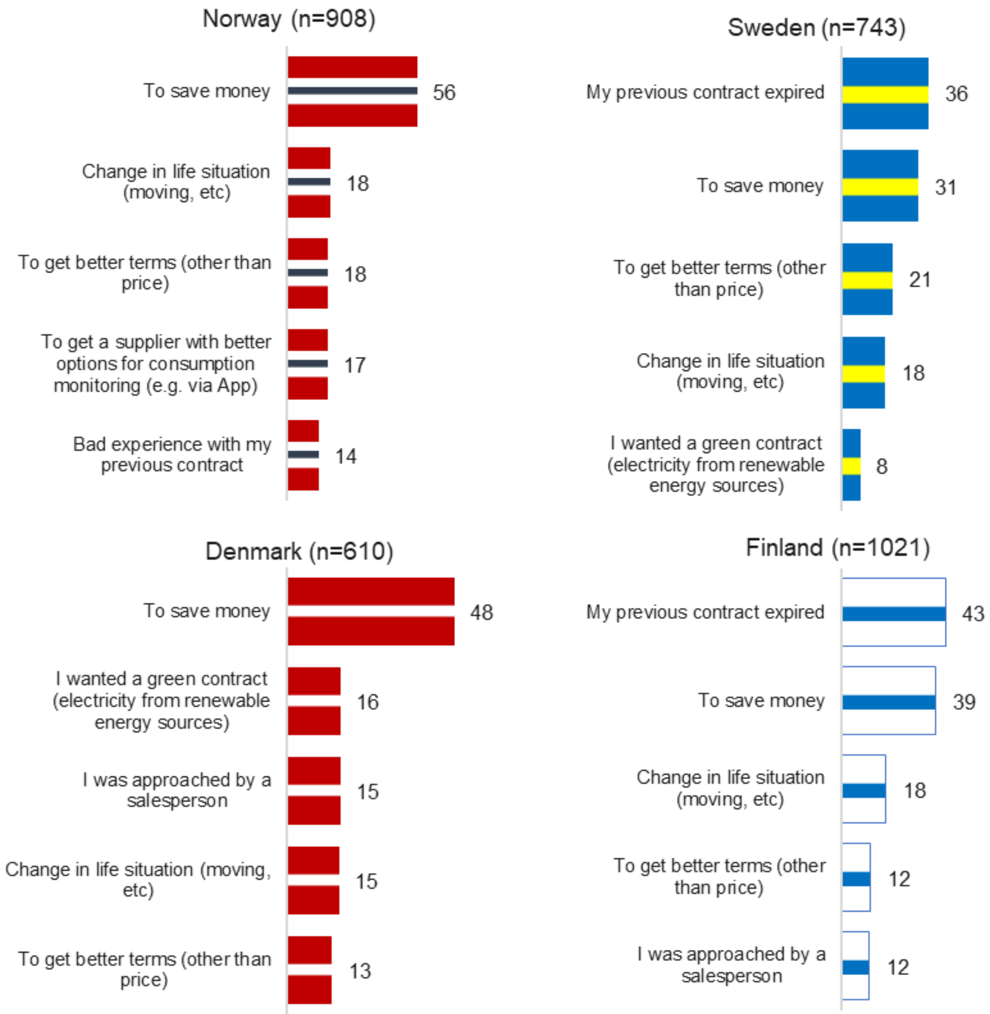
Forty-four percent say that they signed a new contract to save money. This was also the most common reason for signing a new electricity contract in 2018 (46%).

Twenty-six percent signed a new contract because their previous contract expired, 18 percent signed due to a change in their life situation, and 16 percent signed to get better terms (other than price).

Between eight and 11 percent signed a new contract because they were approached by a salesperson, to get better options for consumption monitoring, because they wanted a green contract, or due to a bad experience with their previous contract. It was less common to sign a new contract because someone recommended the supplier (6%) or to get a local supplier (5%). Five percent cite other reasons, and two percent are unsure.

Compared with 2018, there are significant changes to the shares who answer, “my previous contract expired” (up from 22% to 26%), “I was approached by a salesperson” (down from 16% to 11%), and “bad experience with my previous contract” (up from 6% to 8%).

Figure 15: Why did you sign a new electricity contract? Multiple answers possible. Respondents who signed a contract in the past three years. Top 5 results by country.

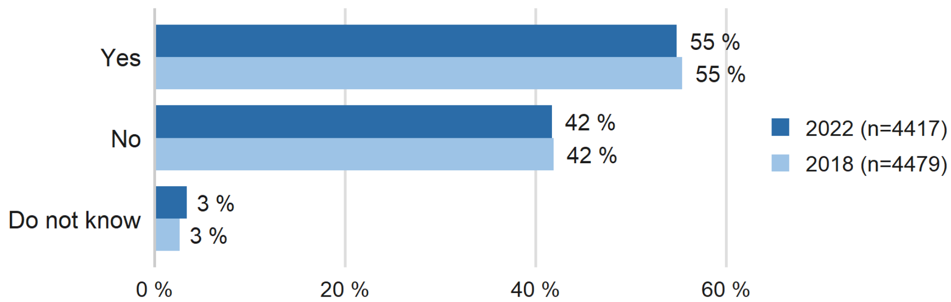


- More than one-half of the Norwegian respondents (56%), and nearly half of the respondents in Denmark (48%), signed a new contract to save money. In Finland, the share is 39 percent, and in Sweden, 31 percent. The second-most common answers among Norwegians are “change in life situation” and “to get better terms (other than price)” (both 18%).
    - The share who signed a new contract because of a change in their life situation is about the same across the four countries (15–18%), while the share who signed to get better terms (other than price) is higher in Sweden (21%) and lower in Denmark (13%) and Finland (12%).
- There is considerable variation in the share who signed a new contract because their previous contract expired – from 43 percent in Finland and 36 percent in Sweden to 10 percent in Denmark and nine percent in Norway.

- Sixteen percent of the Danish respondents signed a new contract because they wanted a green contract, and 15 percent signed because they were approached by a salesperson. In the other countries, the share who wanted a green contract is notably lower – six percent in Norway, seven percent in Finland, and eight percent in Sweden.
    - Having been approached by a salesperson was less common in Sweden (7%, compared to 12–15% in the other countries).
- Fourteen percent of the Norwegians signed a new contract because of a bad experience with their previous contract. This share was 11 percent in Denmark, and only five percent in both Sweden and Finland.
    - More Norwegians also signed a new contract to get better options for consumption monitoring (17%, compared to 9–4%), because the supplier was recommended by someone they know (11%, compared to 6–2%), or to get a local supplier (8%, compared to 5–3%).

Respondents who are not considered to be *active* customers (i.e., respondents who have not signed a new contract in the past year) were asked if they have ever *compared* their current contract to other contracts.

Figure 16: Have you ever compared your current electricity contract to other contracts? Percent of respondents who have not signed a contract in the past 12 months (aware and inactive customers).

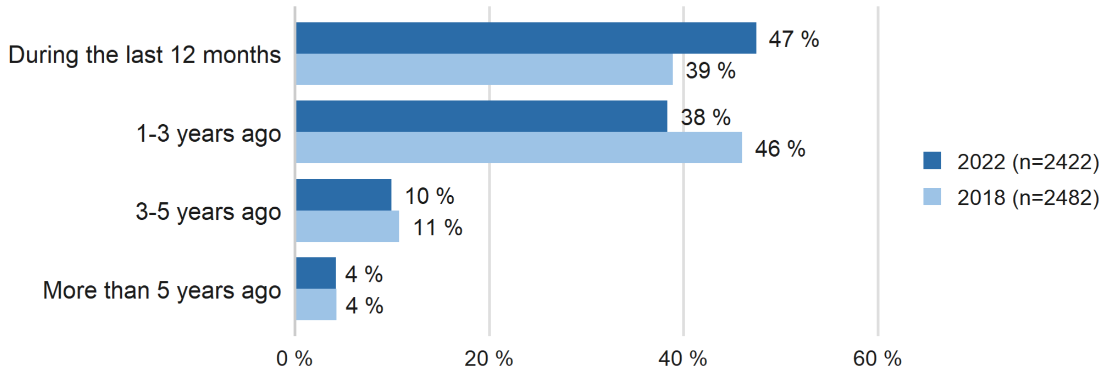


Fifty-five percent of these respondents have compared their current electricity contract to other contracts, while 42 percent have never done so. Three percent are unsure. This is identical to the result in 2018.

- The share is highest in Finland (65%) and lowest in Denmark (42%). In both Norway and Sweden, 57 percent have compared their current electricity contract to other contracts.
- There is an association between annual electricity consumption and comparing contracts: The share ranges from 56 percent among respondents who use less than 5,000 kWh in a year to 72 percent of those who have an annual consumption of more than 20,000 kWh.

Respondents who had compared their current electricity contract to other contracts were asked when they last did this.

Figure 17: When did you last compare your current electricity contract to other contracts? Percent of respondents who have ever compared contracts.



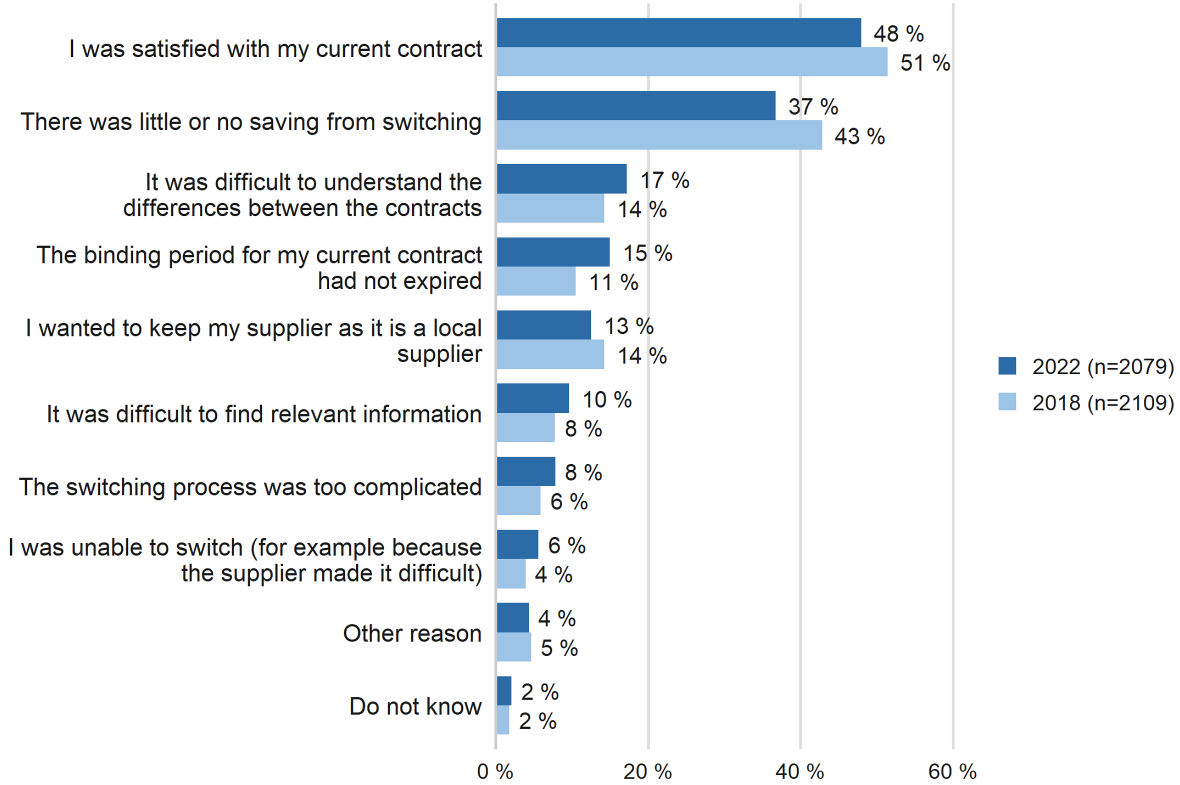
Forty-seven percent of those who have compared their contract to other contracts did this within the past year and are considered *aware* customers. 38 percent compared contracts 1–3 years ago, while 10 percent did so 3–5 years ago. Four percent last compared contracts more than five years ago.

Compared with 2018, there is a significant increase in the share who compared contracts during the last 12 months (from 39% to 47%), while significantly fewer did so 1–3 years ago (down from 46% in 2018 to 38% in 2022).

- Larger shares of the Norwegian (58%) and Finnish (52%) respondents compared contracts within the past year. The share is lowest in Sweden (36%), while 45 percent of the Danish respondents report this. The share that compared contracts 1–3 years ago is lowest in Norway (32%, compared to 38–43%).
    - Sweden had the highest share of respondents who had compared contracts more than three years ago (22%; compared to 8% in Finland, 9% in Norway, and 17% in Denmark).
- A larger share of the youngest respondents (under 35) had compared contracts during the last 12 months (59%, compared to 41–48% in the other age groups). The 50–64 age bracket has the largest share of respondents who last compared contracts more than five years ago (7%, compared to 1–4%).

Those who compared different contracts in the past three years, but did not switch, were asked why they chose to keep their current contract.

Figure 18: You have compared different offers but decided to stay in your current contract. Why? Multiple answers possible. Percent of respondents who have compared contracts in the past three years but not switched.



Forty-eight percent decided to stay in their current contract because they were satisfied with it. 37 percent decided to stay because there was little or no money to save by switching.

It was less common to stay in the contract because it was difficult to understand the differences between contracts (17%), because the current binding period had not expired (15%), or to keep a local supplier (13%).

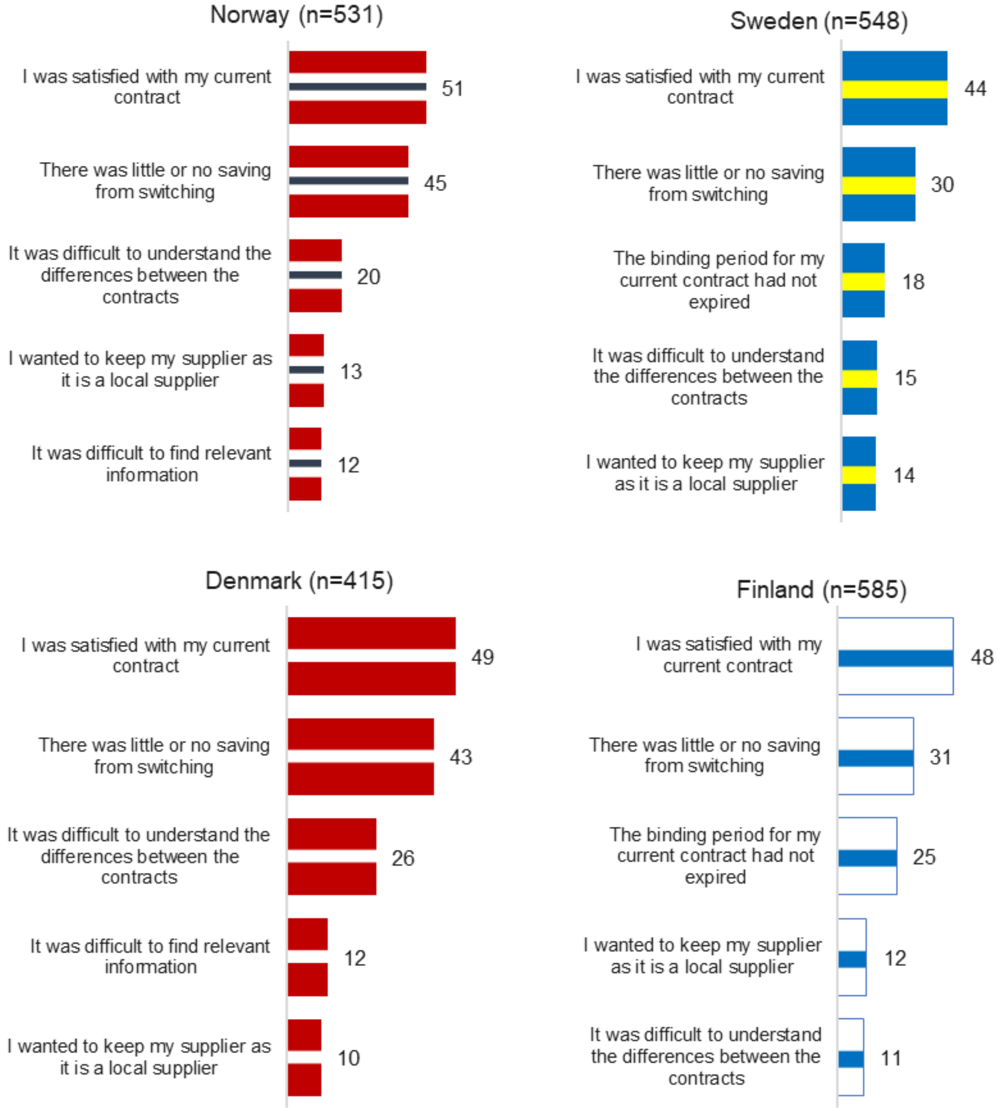
Fewer still say that they decided to stay because it was difficult to find relevant information (10%), the switching process was too complicated (8%), or because they were unable to switch (6%).

Four percent give other reasons for deciding to remain in their current contract, while two percent are unsure.

Compared with 2018, fewer respondents say in 2022 that they stayed because was little or no saving from switching (37%; down from 43%). There is an increase in the share answering that the binding period for their current contract had not expired (15%; up from 11%).

- The share of respondents who kept their current contract because they were satisfied with it increases with age – from 43 percent among those under 35 to 58 percent among those 65 or older. Shares *decrease* with age when it comes to finding the switching process too complicated (from 14% to 3%), having difficulty finding relevant information (from 14% to 6%), finding it difficult to understand the differences between contracts (from 21% to 11%), or being unable to switch (from 10% to 2%).
- There share answering, “there was little or no saving from switching” decreases as annual electricity consumption rises – ranging from 46 percent of those who use less than 5,000 kWh per year to 32 percent of those who have an annual consumption of at least 20,000 kWh.

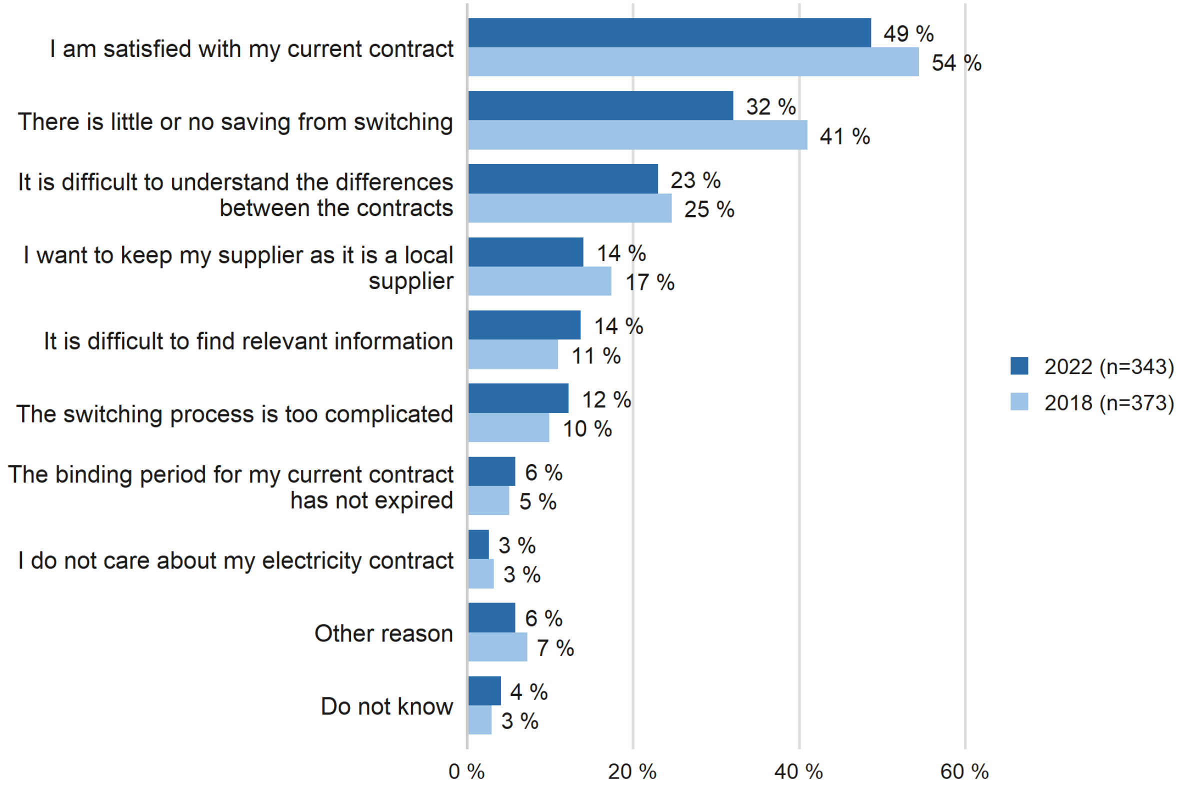
Figure 19: You have compared different offers but decided to stay in your current contract. Why? Multiple answers possible. Percent of respondents who have compared contracts in the past three years but not switched. Top 5 results by country.



- "I was satisfied with my current contract" is the most common response in all four countries (44–51%). "There was little or no saving from switching" is the second-most common response in all four countries.
- More respondents in Norway (45%) and Denmark (43%) say that there was little or no money to save from switching, compared to Finnish and Swedish respondents (31% and 30%, respectively).
- In Norway and Denmark, the third-most common reason to stay is that it was difficult to understand the differences between the contracts. In Finland and Sweden, the third-most common reason is that the current binding period had not expired.

Those who have neither switched nor compared contracts in the past three years were asked why they had not done so more often.

Figure 20: Why have you not switched or compared contracts more often? Multiple answers possible. Percent of respondents who have neither signed a new contract nor compared contracts in the past three years.



About half respond that they have not switched or compared contracts more often because they are satisfied with their current contract (49%). 32 percent say that they have not done so because there would be little or no saving from switching.

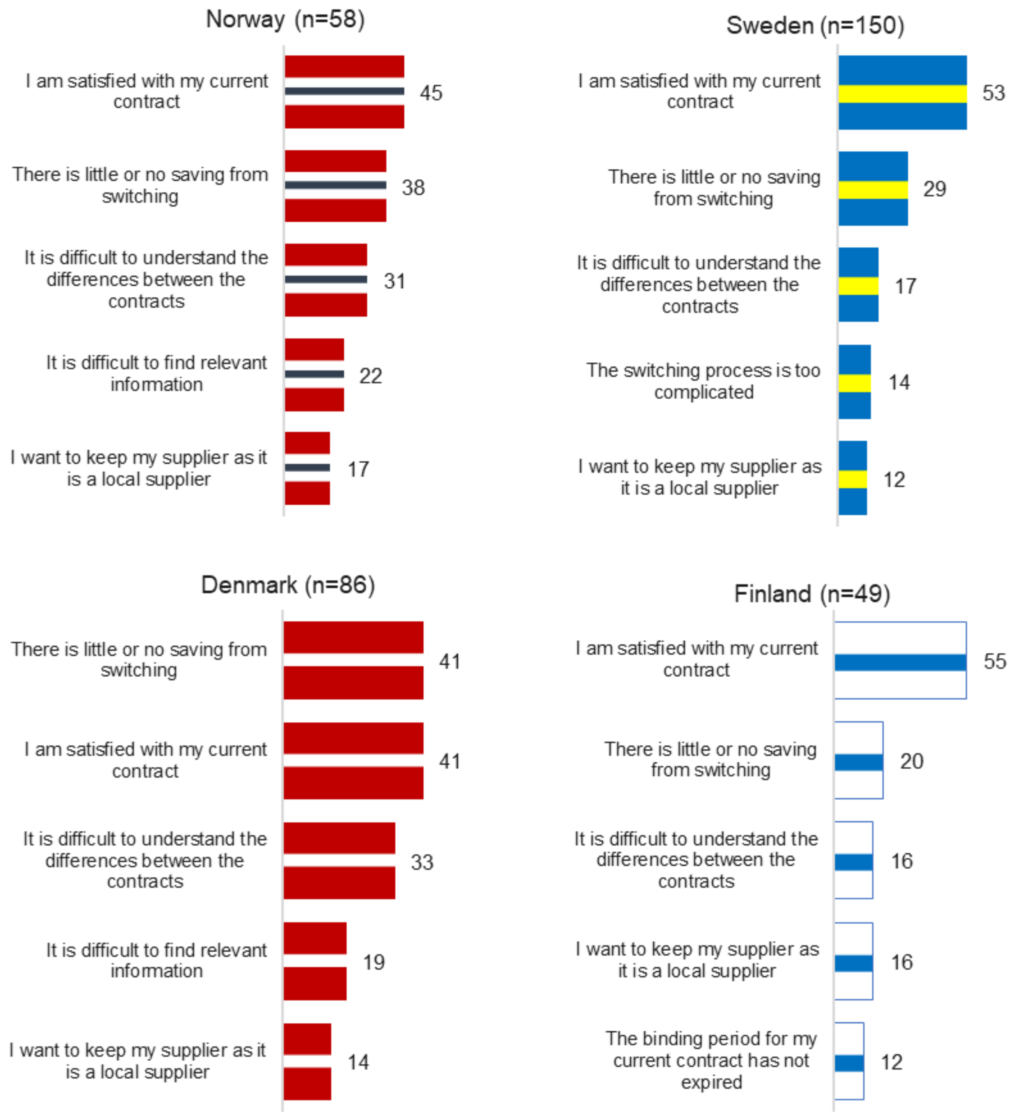
Twenty-three percent say that it is difficult to understand the differences between the contracts, while 14 percent have not switched or compared more often because it is difficult to find relevant information and/or because they want to keep their local supplier. 12 percent find the switching process to be too complicated.

Few have been inactive in the electricity market for at least three years because their binding period has not expired (6%) or because they do not care about their contract (3%).

Six percent cite other reasons, and four percent are unsure.

There are no significant differences between 2018 and 2022.

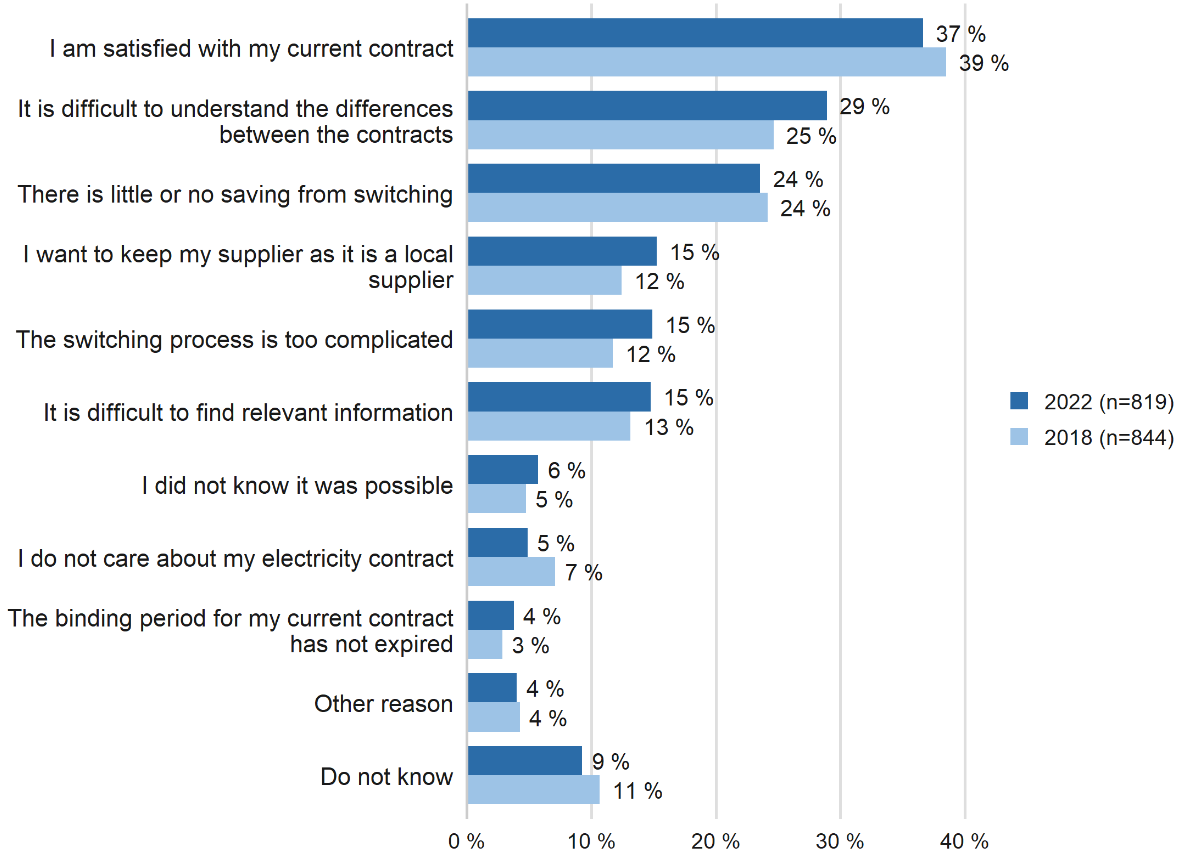
Figure 21: Why have you not switched or compared contracts more often? Multiple answers possible. Percent of respondents who have neither signed a new contract nor compared contracts in the past three years. Top 5 results by country.



- In Sweden and Finland, more than half of these respondents say that they have not switched or compared electricity contracts more often because they are satisfied with their *current* contract. This is also the most common answer in Norway.
- In Denmark, the share who are satisfied with their current contract is equal to the share who say that there is little or no saving from switching. In the three other countries, expecting there to be little or no money to save by switching electricity contracts is the second-most common reason given for not being more active in the electricity market.
- **Note that there are few responses from each country.**

Those who had *never* switched or compared contracts were asked *why* they had never done this.

Figure 22: Why have you never switched or compared contracts? Multiple answers possible. Respondents who have never switched or compared contracts.



The answer that is chosen most frequently is, "I am satisfied with my current contract" (37%). It is also quite common to respond that it is difficult to understand the differences between contracts (29%), and that there would be little or no saving from switching (24%).

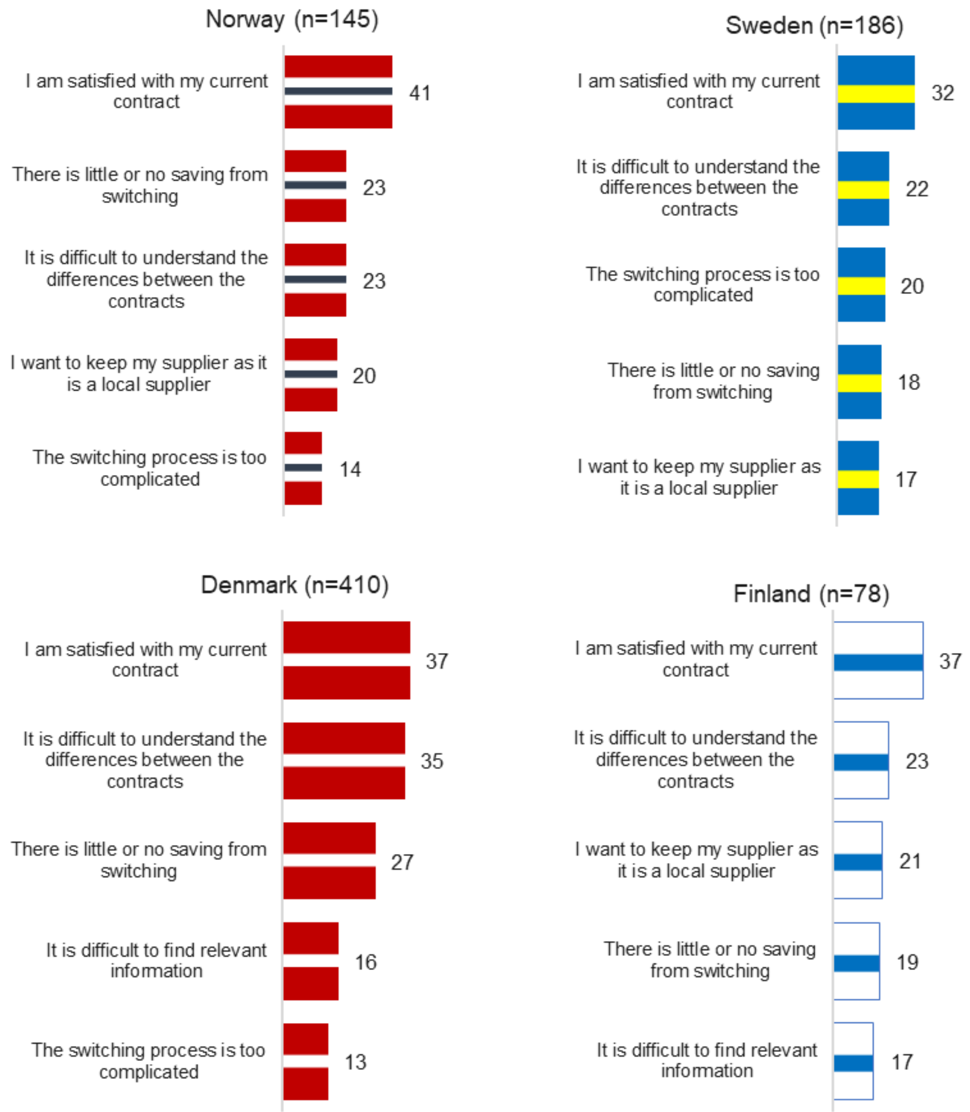
Fifteen percent answer that the switching process is too complicated; it is difficult to find relevant information; and/or that they want to keep their supplier as it is a local supplier.

Few have never been active in the electricity market because they did not know that switching was possible, they do not care about their electricity contract, and/or the binding period of their current contract has not expired (6–4%).

Four percent provide other reasons for not switching or comparing contracts, while nine percent are unsure.

There are no significant differences between 2018 and 2022 (or between subgroups).

Figure 23: Why have you never switched or compared contracts? Multiple answers possible. Respondents who have never switched or compared contracts. Top 5 results by country.

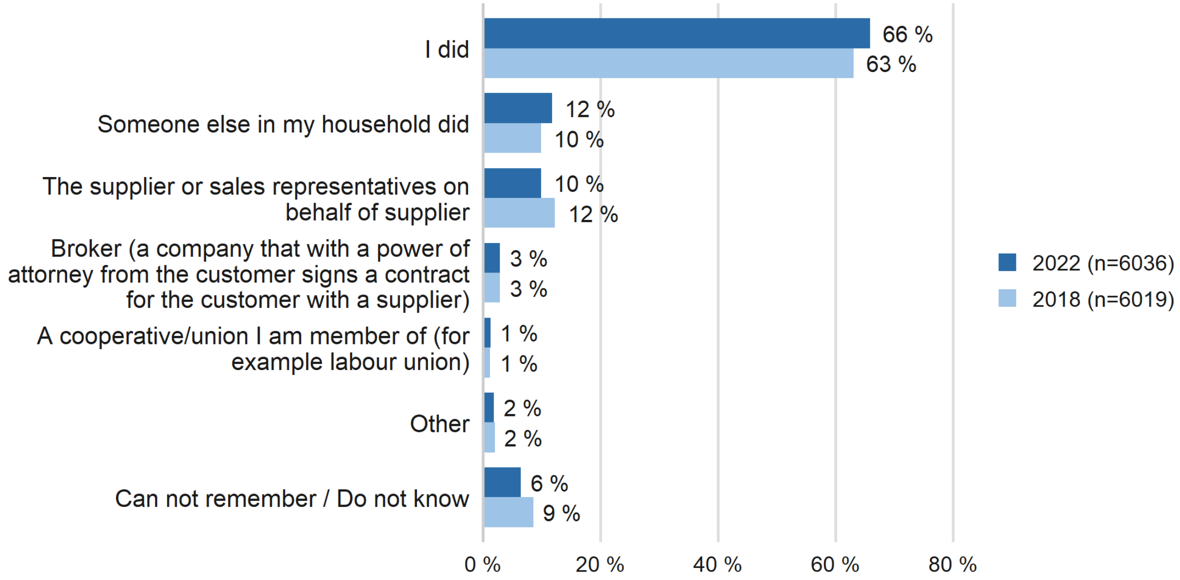


- As was the case with respondents who have not switched or compared contracts in the past three years, the largest share of those who have *never* switched or compared contracts say that this is because they are satisfied with their *current* contract – in all four countries.
- The second-most common answer is that it is difficult to understand the differences between the contracts. In Norway, this is tied with the share who say that there is little or no saving from switching.
    - Shares are relatively similar, and there are too few responses for meaningful breakdowns. It may be of note, however, that in Denmark, the share of respondents who say that it is difficult to understand the differences between the contracts is about equal to the share who are satisfied with their current contract.

The contract-signing process

The respondents were then asked questions related to the signing process, including who initiated the signing of their current contract; how they chose the contract; how they were contacted by the supplier; etc.

Figure 24: Who initiated the signing of your current contract?



Approximately two-thirds of the Nordic respondents initiated the signing of their current contract themselves (66%), while 12 percent say that the signing was initiated by someone else in their household. 10 percent say that the signing was initiated by the supplier or its sales representatives.

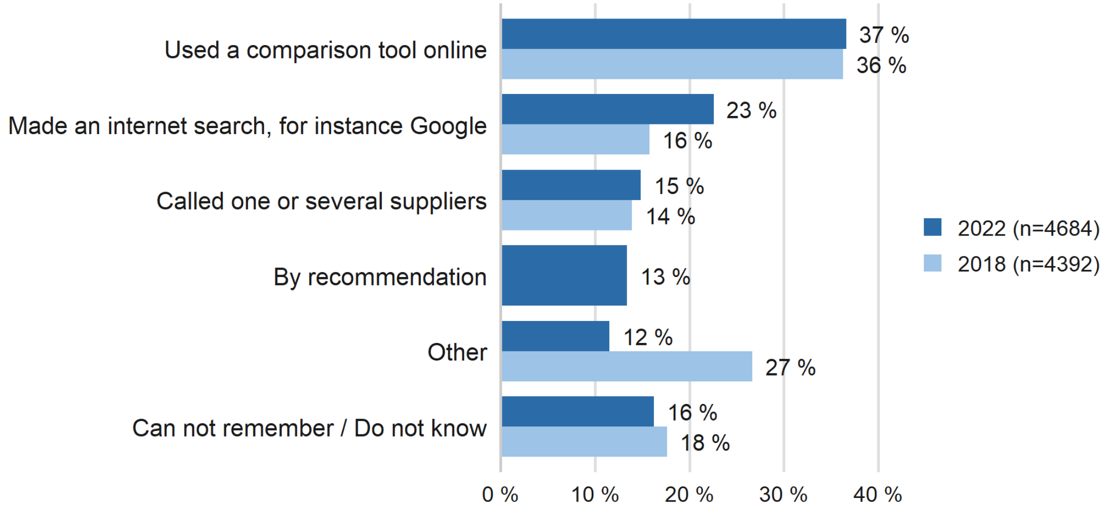
Contracts were rarely initiated by a broker (3%), a cooperative/union (1%), or other parties (2%). Six percent do not know or remember who took the initiative for their current contract.

Compared with 2018, there are small increases in the shares who say that they initiated the signing themselves (up from 63% to 66%) and that the signing was initiated by somebody else in their household (up from 10% to 12%). Slightly fewer respond that the signing was initiated by the supplier or sales representatives on behalf of the supplier (down from 12% to 10%).

- The share who initiated the signing themselves is highest in Finland (71%) and lowest in Denmark (56%). Among both the Norwegian and the Swedish respondents, 68 percent personally initiated the signing of their current contract.
    - The share who do not know or cannot remember is significantly higher in Denmark (14%) than in the other three countries (2–5%).
- The share whose contract was initiated by the supplier, or its sales representatives, is highest in Finland (12%) and lowest in Sweden (8%).
- The share who initiated their current contract themselves is highest among the *active* customers, 77 percent, compared to 70 percent among the *aware* and 59 percent among the *inactive* customers. *Inactive* customers are the most unsure (11%, compared to 0–2%).
- Younger respondents are less likely than older ones to have initiated the signing themselves.

Respondents who said that either they, or someone else in their household, initiated the signing of their current contract were asked how they *chose* their contract.

Figure 25: How did you go about choosing electricity contract? Multiple answers possible. If signing initiated within own household.



Thirty-seven percent of the Nordic electricity customers used a comparison tool online when choosing an electricity contract. 23 percent did an internet search, 15 percent called one or several suppliers, and 13 percent followed a recommendation.[11]

Twelve percent report some other approach, and 16 percent do not know or remember how they chose the contract.

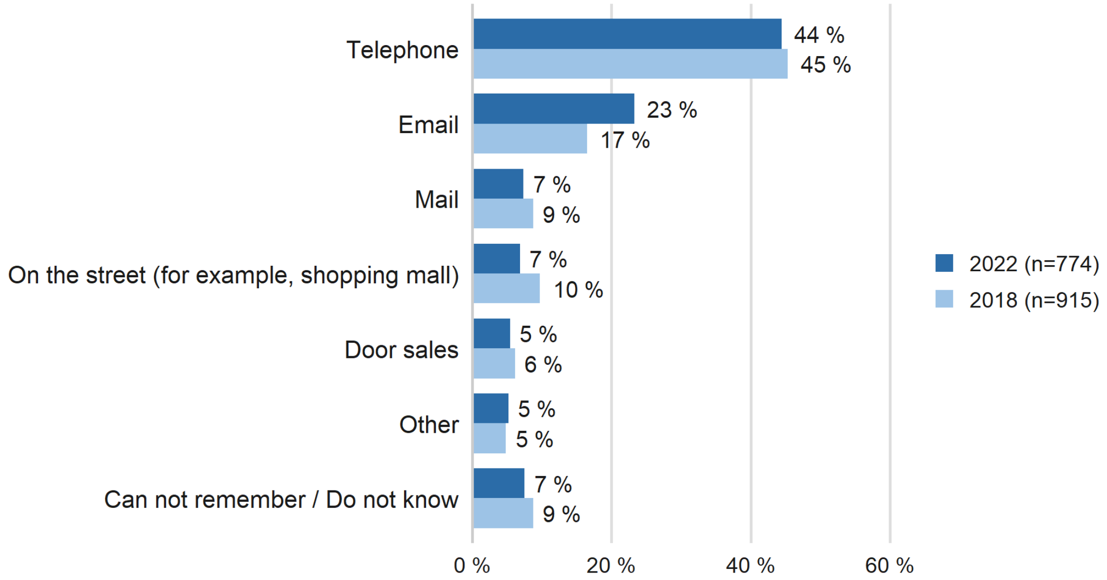
Compared with 2018, significantly more respondents did an internet search in 2022 (23%; up from 16%).

- Forty-seven percent in Finland, 39 percent in Sweden, and 35 percent in Norway used an online comparison tool. In Denmark, this share is only 22 percent.
- In Denmark, the most common approach was to phone the electricity supplier (27%). Between 10 and 14 percent in the other countries did this.
- In Norway, around one-in-five went by recommendation (19%). In the other countries, 11–12% did this.
- The shares of respondents who used an online comparison tool or did an internet search decrease with increasing age.
- The *aware* and *active* customers used online comparison tools and internet searches to a greater extent than the *inactive* customers did.
    - The difference is particularly large for online comparison tools, which were used by 48 percent of *active* customers and 47 percent of *aware* customers but only 26 percent of *inactive* customers. Inactive customers were somewhat more likely to go by recommendation (15%, compared to 11–12%) – and a considerably higher share of the *inactive* customers do not know or remember how they went about choosing their current electricity contract (24%, compared to 7% of *active* and 10% of *aware* customers).

Those who responded that their current contract was initiated by an electricity supplier/broker were asked how they had been *contacted* by that supplier/broker.

[11] This alternative was added to the questionnaire in 2022.

Figure 26: How did they contact you? Percent of respondents who were contacted by a supplier or broker.



Forty-four percent were contacted by telephone, while 23 percent were contacted by email.

Seven percent were contacted by mail, seven percent were approached on the street/in a public space, and five percent reported "door sales".

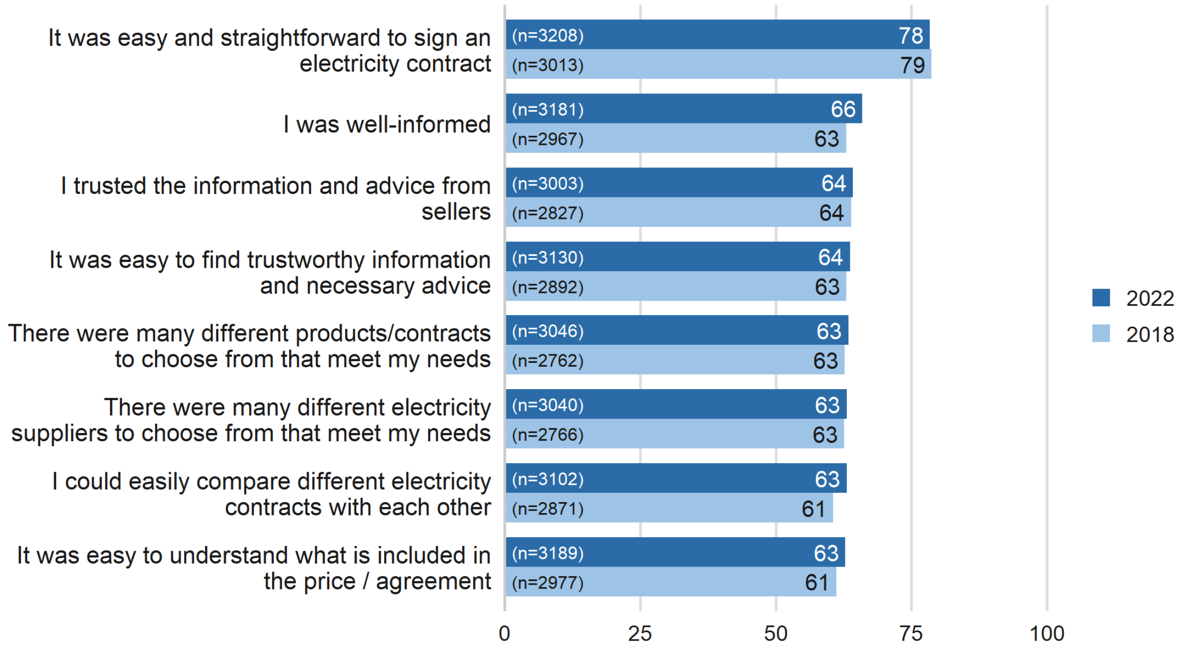
Five percent report other forms of contact, while seven percent do not know or remember how they were contacted by the electricity supplier or broker.

Email was more common in 2022 (23%) than in 2018 (17%).

- More than half of the Finnish respondents were contacted by telephone (53%), as were 45-46 percent in Norway and Denmark, and only 32 percent of the Swedish respondents.
- The share who were contacted by email was highest among the Swedish respondents (32%, compared with 24% of the Finnish respondents and 19% in Denmark and Norway).
- Door sales had been the contact form for around one-in-ten in Norway and Denmark (10% and 8%, respectively), and only very small shares of the Finnish and Danish respondents (3% and 1%, respectively).

Customers who had signed a new contract in the past three years were asked to consider different statements related to the process.

Figure 27: Before you made your current choice of electricity contract, to what extent did you experience the following …? Average scores: 0=Not at all and 100=High extent. "Do not know" is excluded. Respondents who have signed a new contract in the past three years.



On average, the Nordic respondents experienced to a high extent that it was easy and straightforward to sign their current electricity contract (average score 78 out of 100). They experienced to a moderate extent that they were well-informed (66) – and to some extent that: They trusted the information and advice from sellers, and it was easy to find trustworthy information and necessary advice (both 64); there were many different electricity suppliers and products/contracts to choose from that met their needs; they could easily compare different contracts; and it was easy to understand what was included in the price/agreement (all 63).

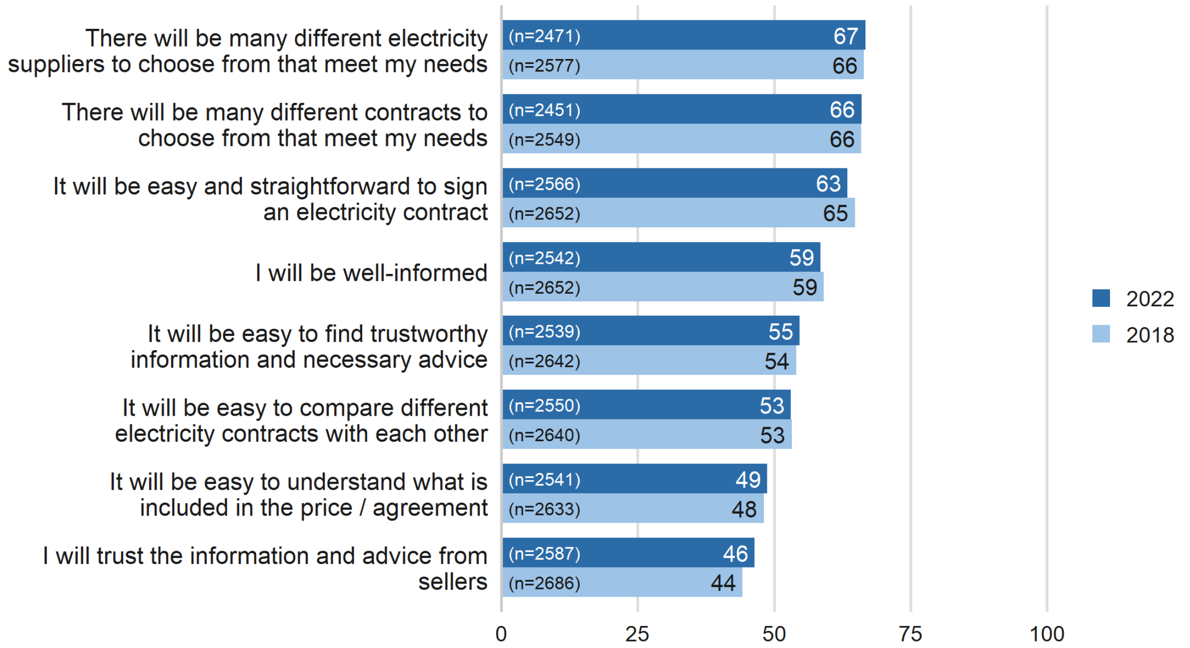
Compared with 2018, there are small but statistically significant increases to the average scores of the Nordic respondents for the statements "I was well-informed" (from 63 to 66) and "I could easily compare different electricity contracts with each other" (from 61 to 63).

- While Norwegian and Finnish electricity customers found it easiest to sign an electricity contract (82 and 80, respectively), Danish (77) and Swedish (74) customers also found this to be unproblematic.
- As regards the statement "I was well-informed" Denmark stands out with the lowest score (59). The other countries all have quite similar scores: 67 in Finland, 68 in Sweden, and 69 in Norway.
- Trust in information and advice from the sellers was highest in Finland, with a score of 70, and lowest in Denmark, at 58. The score was 64 in Norway and 61 in Sweden.
- Finnish customers experienced to a somewhat lower extent than those in the other countries that they had many different suppliers (57, compared to 63–67) and products/contracts (59, compared to 63–68) to choose from.
    - The Norwegian (67-66) and Danish (67-68) customers experienced this the most.
- The Danish customers did not experience it as easy to understand what was included in the price/agreement (average score 49). Customers in the other countries found this easier: The scores are 64 in Sweden, 65 in Norway, and 69 in Finland.

- Denmark also has the lowest scores for "it was easy to find trustworthy information and necessary advice" (54, compared to 64–68 in the other countries) and "I could easily compare different contracts with each other" (52, compared to 64–66).
- Older customers experienced it as less easy to compare contracts and find trustworthy information, compared with younger customers. The scores for experiencing that there were many different electricity suppliers and products/contracts to choose from also decrease with increasing age.
  - On the other hand, older customers found it easier and more straightforward to sign an electricity contract – and they also tended to agree more that they were well-informed, compared with younger customers.
- In general, scores are higher among the *active* and *aware* customers than among the *inactive* customers.

Those who have *not* signed a new contract in the past three years were also asked to consider different statements concerning the contract process – given a hypothetical contract choice in the future.

Figure 28: If you in the future would like to choose an electricity contract, to what extent do you agree that … ? Average scores: 0=Not at all and 100=High extent. "Do not know" is excluded. Respondents who have not signed a new electricity contract in the past three years.



Overall, those who have *not* signed a new contract in the past three years express a moderate degree of agreement that if they were to do so in the future, there would be many different suppliers (67) and many different contracts (66) to choose from that would meet their needs. They also tend to agree that it would be easy and straightforward to sign an electricity contract (63), they would be well-informed (59), and it would be easy to find trustworthy information and necessary advice (55).

Respondents are fairly evenly split when it comes to whether they expect it to be easy or difficult to compare different electricity contracts (53), or to understand what is included in the price/agreement (49), and they tend to *disagree* that they will trust the information and advice from sellers (46).

There are no significant differences between 2018 and 2022.

Respondents who have not signed a new contract in the past three years have low confidence in the electricity market – with scores of 46 and 55, respectively, for the statements concerning trust in sellers and how easy it will be to find trustworthy information.

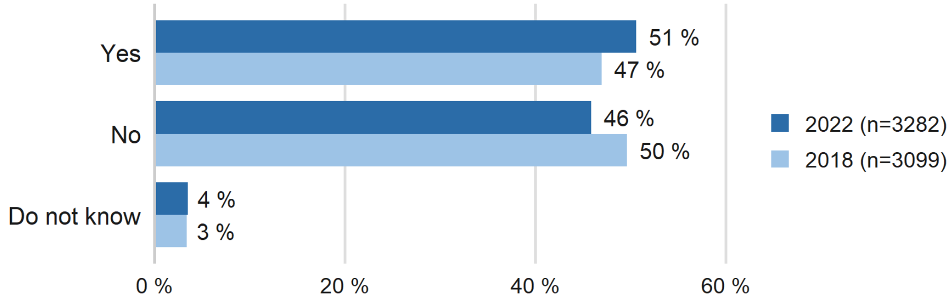
- Finland is the only country where the respondents do not, on average, *disagree* with the statement "I will trust the information and advice from sellers" – though they are about evenly split (average score 53). Danish respondents disagree the most with the statement (43), while Swedes (47) and Norwegians (46) express about the same degree of disagreement.
- Danish respondents appear to have the least confidence in their hypothetical future contract-switching process – at least, they do not expect it to be *easy*. Danes have significantly lower average scores for (and are the only ones to express disagreement with) "It will be easy to find trustworthy information and necessary advice" (46, compared to 56–60 in the other countries),"It will be easy to compare different electricity contracts with each other," (46, compared to 53–59) and "It will be easy to understand what is included in the price/agreement" (43, compared to 49–54).
    - The Danish respondents are also the least inclined to agree that "It will be easy and straightforward to sign an electricity contract" – though they do, on average, agree somewhat (average score 59, compared to 65-66 in the other countries).
- Scores for the statement "I will be well-informed" are 55 in Norway, 57 in Finland, 59 in Denmark, and 62 in Sweden.
- There is most overall *agreement* that there will be many different electricity suppliers and contracts to choose from. In Finland, the scores for these statements are 68-70, in Norway, 69-66, in Sweden, 67-66, and in Denmark, the scores are 65-64.
- Younger respondents are more inclined than older respondents to expect it to be somewhat easy to find trustworthy information, compare contracts, and understand what is included in the price/agreement.
- *Inactive* customers answer, "do not know" far more than *active* and *aware* customers do.

Comparison tools

The respondents were also asked to consider different questions regarding comparison tools.

Those who had signed a contract in the past three years were asked if they had visited an online comparison tool at the time:

Figure 29: When you signed/compared your current electricity contract, did you visit an online comparison tool? Respondents who have signed a new contract in the past three years.

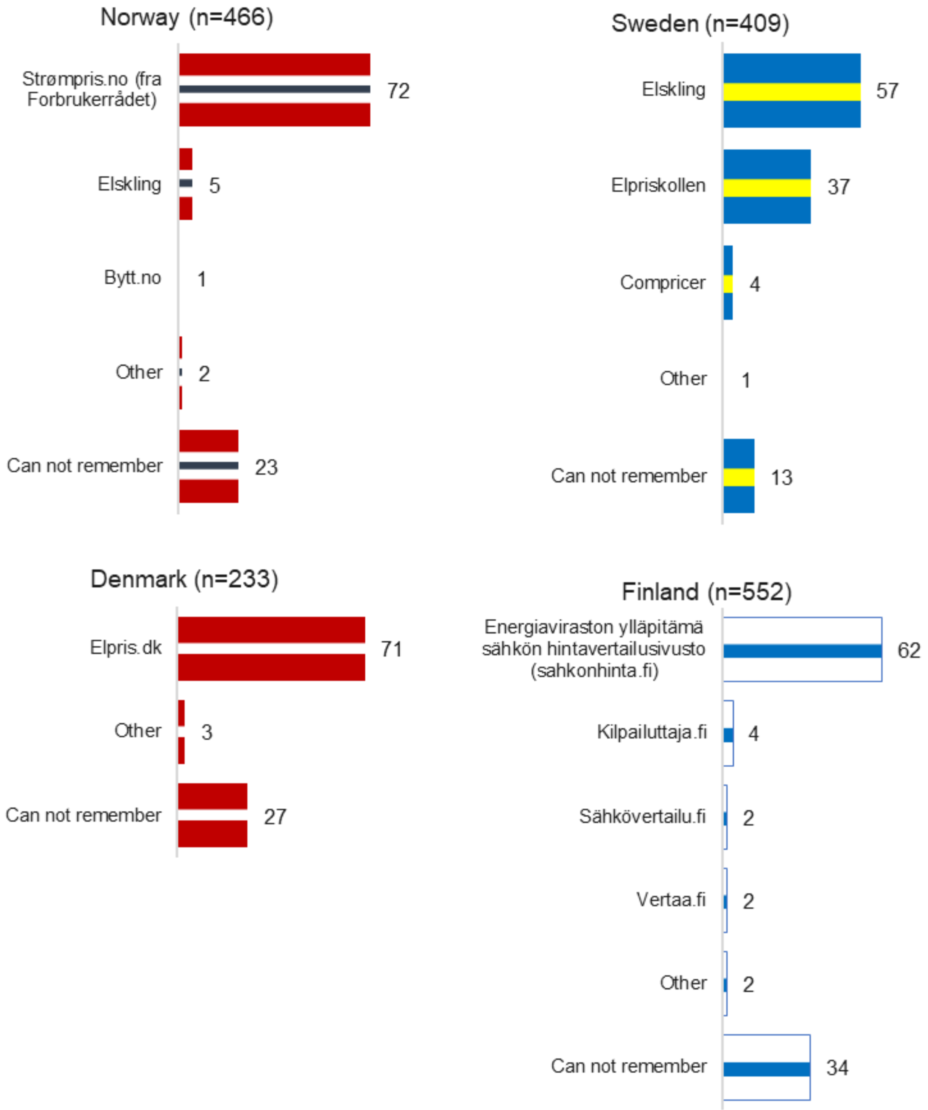


Around one-half of the Nordic respondents who signed a new electricity contract in the past three years visited an online comparison tool when they signed their current contract (51%). Compared with 2018, this is an increase of four percentage points.

- Small majorities in both Sweden (55%), Finland (54%), and Norway (51%) say that they visited an online comparison tool. In Denmark, just under four-in-ten report doing this (38%).
- The share decreases somewhat with age – from 56 percent of respondents under 35 to 47 percent of those 65 or older.
- *Aware* customers used online comparison tools the most (68%), and *inactive* customers, the least (39%). 50 percent of the *active* customers had visited a comparison tool when they signed their current contract.

Those who had visited a comparison tool were asked to name the tool they had visited.

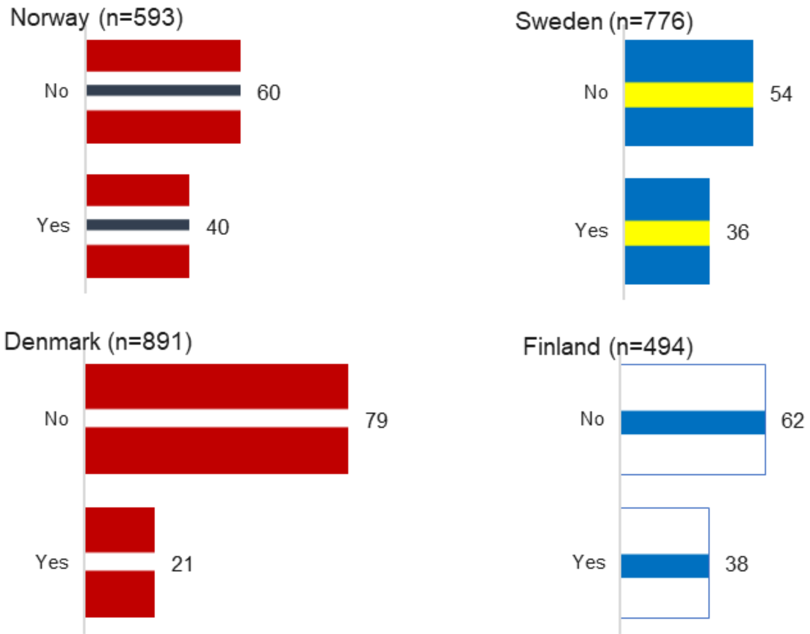
Figure 30: What comparison tool(s) did you visit? Multiple answers possible. Respondents who visited a comparison tool when they signed their current contract Multiple answers possible. Results by country.



- In Norway, 72 percent of those who had visited an online comparison tool visited "Strømpris.no" (price comparison tool managed by the Norwegian Consumer Council), and between one and five percent named other online comparison tools. 23 percent do not remember which comparison tool they visited.
- In Denmark, 71 percent of those who had visited an online comparison tool visited "Elpris.dk" (price comparison tool managed by the Danish energy regulatory authority). Three percent named other online comparison tools, and more than one-quarter say that they cannot remember (27%).
- In Sweden, 57 percent visited "Elskling" and 37 percent visited "Elpriskollen" (price comparison tool managed by the Swedish energy regulatory authority). Between one and four percent named other comparison tools, while 13 percent cannot remember.
- In Finland, 62 percent visited "sahkonhinta.fi" (price comparison tool managed by the Finnish energy regulatory authority), and between two and four percent named other comparison tools. As many as one-in-three cannot remember which comparison tool they visited (34%).

Respondents who have *not* signed a contract in at least three years were also asked about comparison tools.

Figure 31: Do you know any of any online comparison tools for electricity contracts? Respondents who have not signed a contract in the past three years. Result by country.

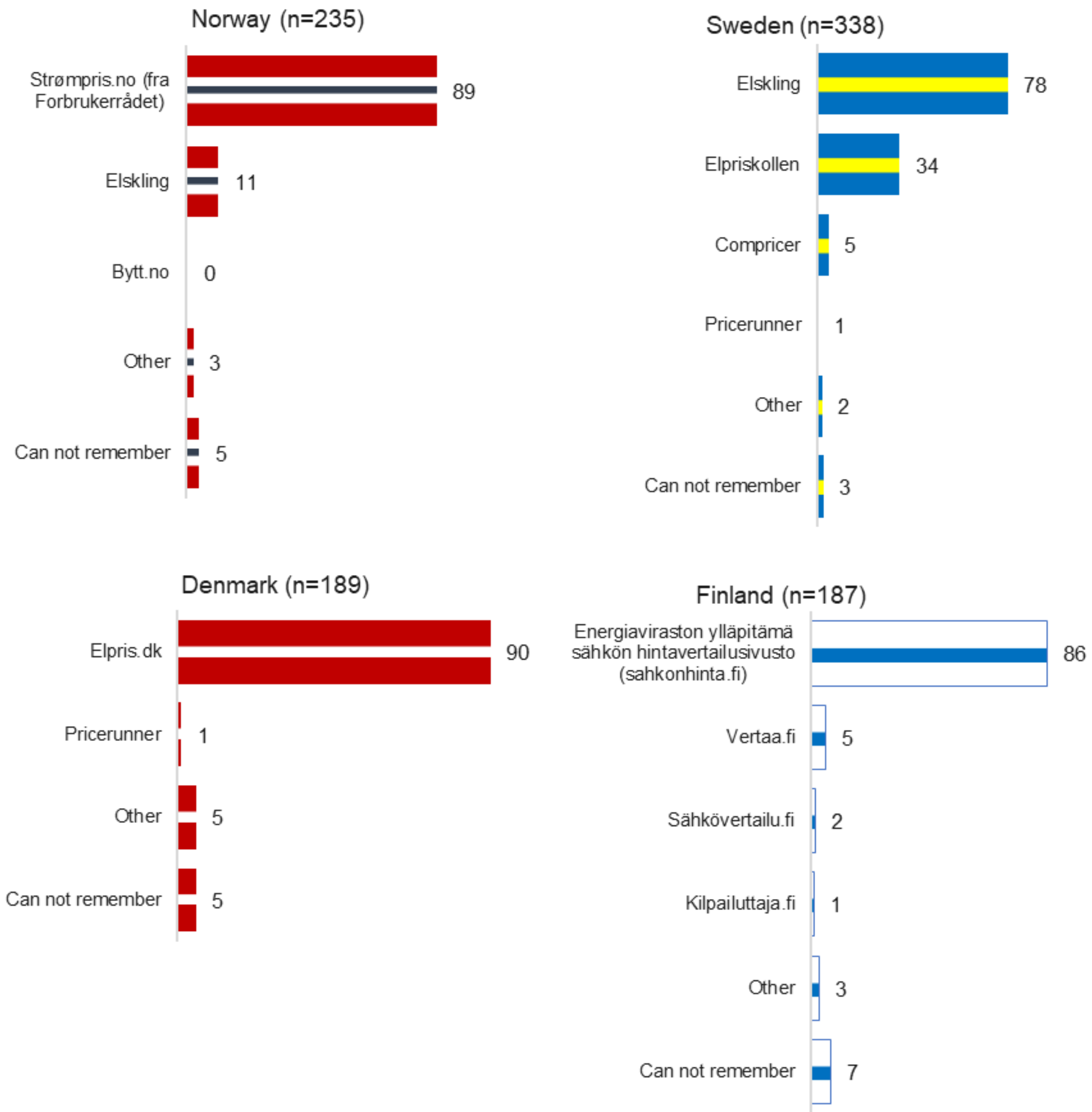


Thirty-five percent of the Nordic respondents who have *not* signed a new contract in the last three years say that they *know of* an online comparison tool.

- Considerably fewer Danish respondents (21%) say that they know of any such comparison tools, compared with respondents from Sweden (46%), Norway (40%), and Finland (38%).
- There is an association between annual electricity consumption and the share who answer, "yes" – ranging from 37 percent among those who use less than 5,000 kWh per year to 51 percent among those who use at least 20,000 kWh per year.
- More of the respondents with a spot-price contract report that they know of online comparison tools (46%), compared with those with a fixed- or variable-price contract (35–37%).

Those who said that they knew any comparison tools for electricity contracts were then asked which comparison tools they had *visited*.

Figure 32: What comparison tool(s) have you visited online? Multiple answers possible. Respondents who have not signed a contract in the past three years and who say they know of an online comparison tool. Results by country.

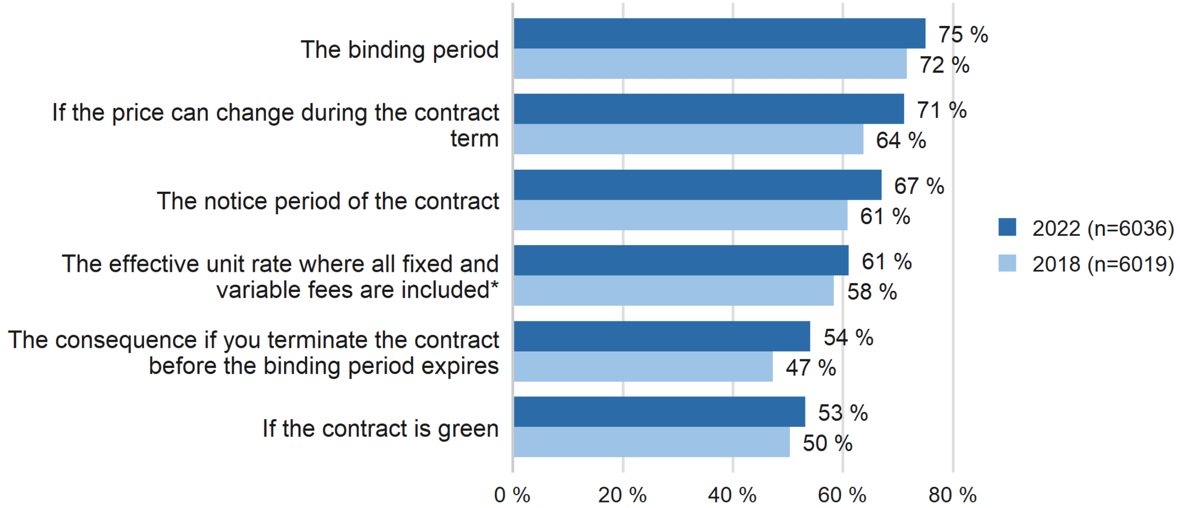


- In Norway, 89 percent have visited “Strømpris.no”, and between 3 and 11 percent report visiting other comparison tools. Five percent cannot remember.
- In Sweden, 78 percent have visited “Elskling”, 34 percent have visited “Elpriskollen”, and between one and five percent cite other comparison tools. Three percent cannot remember.
- In Denmark, 90 percent have visited “Elpris.dk”. Between one and five percent cite other comparison tools, and five percent cannot remember.
- In Finland, 86 percent have visited “sahkonhinta.fi”. Between one and five percent visited other comparison tools, and seven percent cannot remember.

Terms of contract

The respondents were asked about their current electricity contract and how well they know the terms of their contract.

Figure 33: When you think of your current electricity contract, are you aware of …? Shares who answered "Yes". *= only Sweden and Denmark (n=3020).



Three-in-four Nordic respondents are aware of their contract's binding period (75%), and seven-in-ten are aware of whether the price can change during the contract term (71%). 67 percent are aware of their contract's notice period, while 61 percent are aware of the effective unit rate. Slightly more than one-half are aware of the consequences of terminating the contract before the binding period expires (54%) and whether their contract is green (53%).

Swedish and Danish customers were also asked whether they are aware of the effective unit rate (where all fixed and variable fees are included). 64 percent in Sweden, and 58 percent in Denmark, say, "yes".

Compared with 2018, more respondents now say that they are aware of the contract's binding and notice periods, whether the price can change during the contract term, the consequence if they terminate the contract before the binding period expires, and whether the contract is green (differences of 3–7 percentage points).

- Eighty-six percent of Finnish customers are aware of their contract's binding period. The share is nearly as large in Sweden (83%), somewhat smaller in Norway (75%), and considerably smaller in Denmark (57%).
- The respondents are also mostly aware of their contract's notice period: 73 percent in Sweden, 72 percent in Finland, 69 percent in Norway – and 53 percent in Denmark.
- The share who are aware of whether the price can change during the contract term is highest in Norway (81%) and Sweden (79%). 73 percent of the Danes, and 51 percent of the Finns, say that they are aware of this (note that Finland has a very high share of customers with fixed-price contracts).
- Sixty-four percent of the Norwegian customers are aware of the consequence of terminating their contract before the binding period expires. This share is 56 percent in Finland, 54 percent in Sweden, and only 42 percent in Denmark.
    - The Danish customers are generally the least aware of their current contractual terms – except when it comes to whether their contract is "green" – where the share

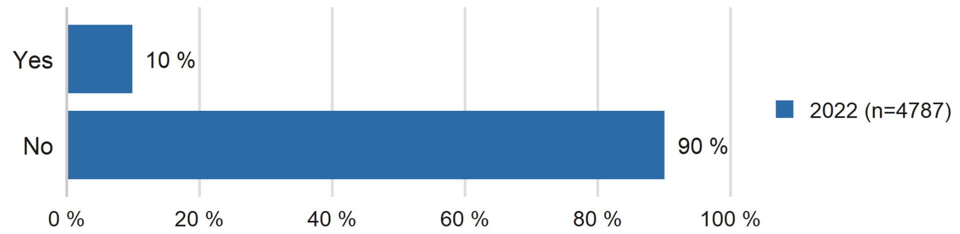
ranges from 61 percent in Sweden to 46 percent in Finland (At 52% and 54%, respectively, shares in Denmark and Norway are quite similar.).[12]

- Awareness of binding and notice periods increases with age.
- *Aware* and *active* customers are generally more familiar with the various contract terms, compared to the *inactive* customers.
- Customers with fixed-price contracts are the most aware of their binding period.
- Those with the highest annual electricity consumption (more than 20,000 kWh) tend to be a little more aware than others.

Negative experiences and complaints

The 2022 version of the survey also included a section exploring the respondents' *negative* experiences with the electricity market. Those who have signed an electricity contract were asked if they experienced problems with their new supplier after signing their current contract – and whether they had made a complaint regarding their problem.

Figure 34: After you signed your current contract, did you experience problems with your new electricity supplier? Respondents who have ever signed a contract.



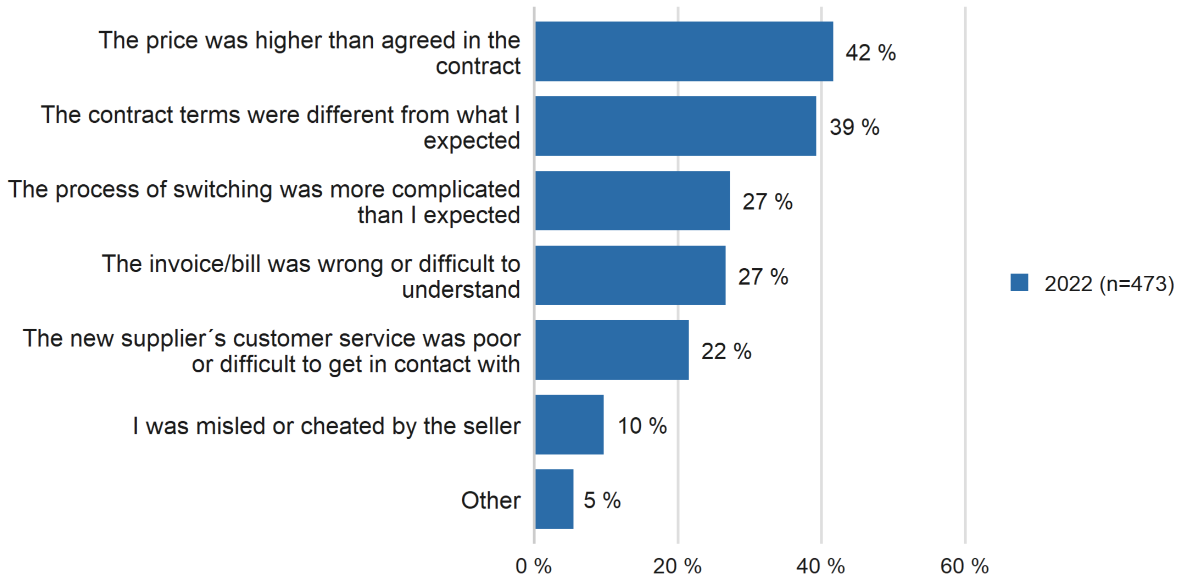
One-in-ten respondents who have (ever) signed an electricity contract experienced problems with their new supplier after signing their *current* contract (10%).

- Twelve percent of the Norwegian respondents, 11 percent of the Swedish and Danish respondents, and only six percent of the Finnish respondents experienced problems after signing their current contract.
- More than one-in-five respondents under 35 years old (22%) and 12 percent of those aged 35–49 experienced problems with their supplier. In comparison, only five percent of 50–64-year-olds, and four percent of those who are 65 years old or older, experienced problems.
- A larger share of the *aware* customers had experienced problems (16%, compared to 8% of other customers)
- More of the respondents who get their electricity bills on paper report having experienced problems, compared with those whose electricity bill is electronic (15 and 9%, respectively).

Those who experienced problems with their new electricity supplier were asked what *kind* of problem they had experienced.

[12] The share wo say they are *aware of whether* the price can change during the contract term is considerably lower in Finland (51%) than in the other three countries (73–81%). However, as fixed-price contracts are much more common in Finland, it is possible that a fair share of the Finnish respondents have answered "no" meaning to convey that their price *cannot* change during the contract term.

Figure 35: What kind of problem did you experience? Respondents who experienced problems with their new electricity supplier.



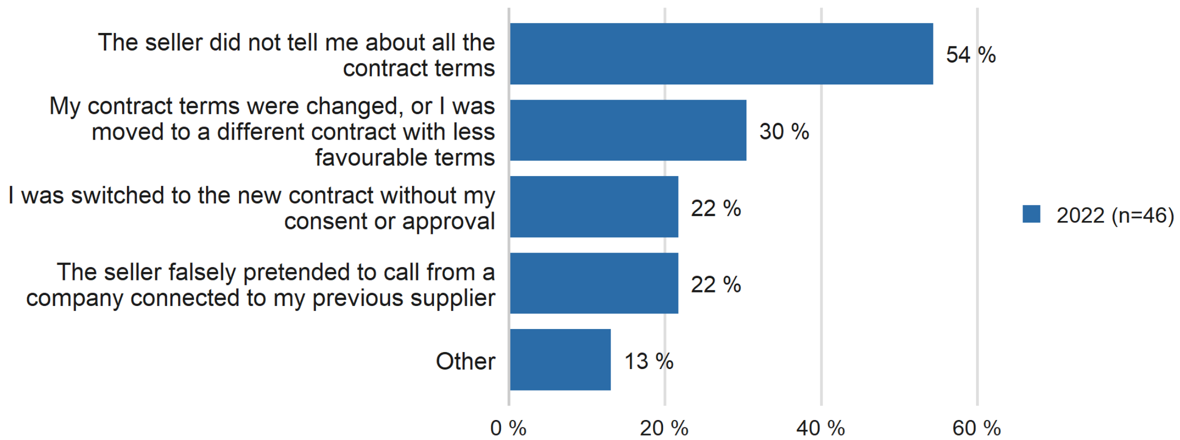
Roughly four-in-ten of those who experienced problems with their new supplier say that the price was higher than agreed in the contract (42%) or that the contract terms were different from what they expected (39%). 27 percent say that the switching process was more complicated than expected, or that the invoice/bill was wrong or difficult to understand. Around one-in-five say that the new supplier's customer service was poor or inaccessible (22%).

Ten percent say that they were misled or cheated by the seller, and four percent cite other problems.

- More of the *older* respondents report that they were misled or cheated by the seller: 29 percent of those who are 65 or older and 22 percent of those aged 50–64 – compared with only six percent of respondents 35–49 and five percent of those who are under 35.

Those who were misled or cheated by the seller were asked *how* they were misled or cheated.

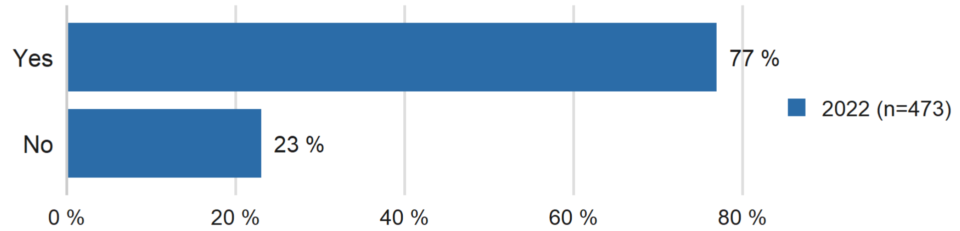
Figure 36: In what way were you misled or cheated by the seller? Respondents who were misled or cheated by the seller.



The most common response among those who say they were misled or cheated by the seller is that the seller did not reveal all the contract terms. Many also report that their contract terms were changed, or they were moved to a contract with less favorable terms, and somewhat fewer report that the seller pretended to call from a company related to the previous supplier, or they were switched to the new contract without their consent or approval. **Note that only 46 respondents were asked this question**.

Customers who had experienced problems with their new electricity supplier were also asked whether they had made a complaint regarding their problem.

Figure 37: Did you make a complaint regarding your problem? Respondents who experienced problems with their new electricity supplier.

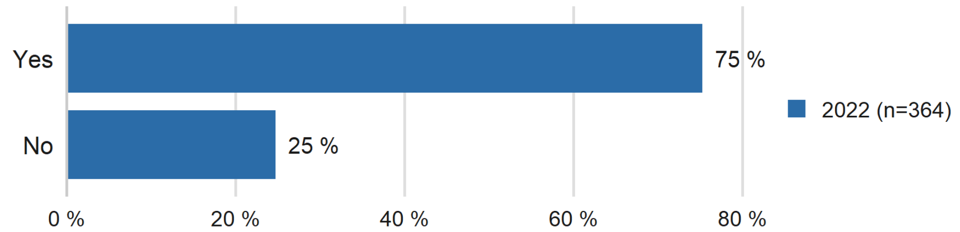


Seventy-seven percent of the respondents who experienced problems with their new supplier made a complaint regarding their problem.

- Four-fifths of the Danish and Swedish respondents, three-quarters of the Norwegian respondents, and two-thirds of the Finnish respondents made a complaint.
- Eighty-five percent of respondents under 35 complained about their problem, compared with 70–74 percent in the older age groups.

Customers who had complained were asked if the problem got fixed due to their complaint – and how satisfied they were with the outcome.

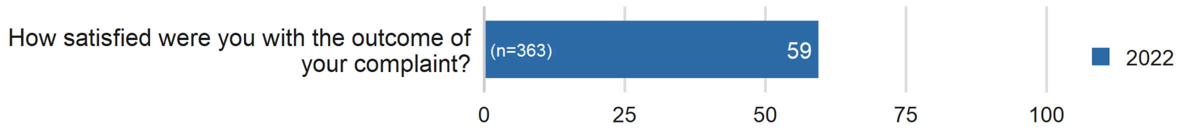
Figure 38: Did your problem get fixed due to your complaint? Respondents who experienced problems with their new electricity supplier and who complained.



Three-in-four say that the problem got fixed due to their complaint (75%).

- About the same share of respondents in all countries report this.
- Experiencing that the problem got fixed was most common among the youngest respondents (84% “yes” under age 35).

Figure 39: How satisfied were you with the outcome of your complaint? Average scores: 0=Very dissatisfied and 100=Very satisfied. "Do not know" is excluded. Respondents who experienced problems with their new electricity supplier and had complained.



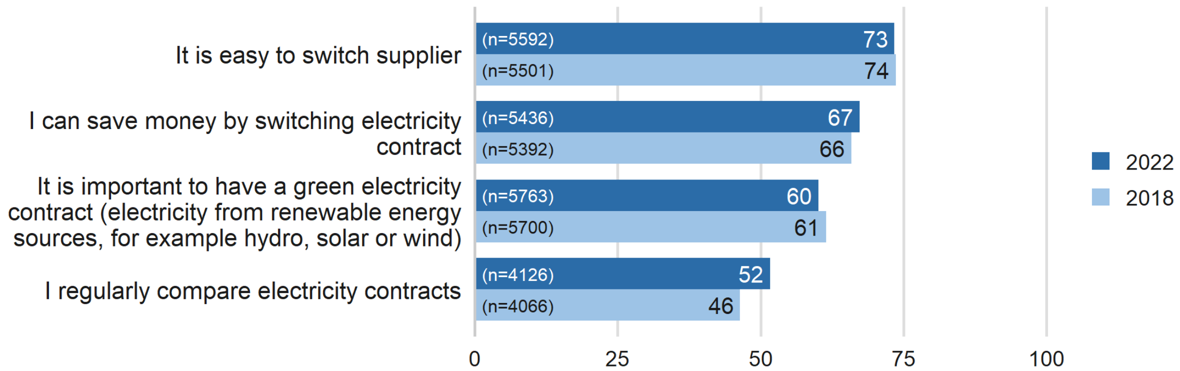
When it comes to satisfaction with the outcome of the complaint, the results show a moderate degree of satisfaction (average score 59 on a scale from 0 to 100). 23 percent say that they were dissatisfied, while 48 percent say that they were satisfied.

- Again, results are about the same across the Nordic countries; the average score is 62 in Sweden, 61 in Norway, 59 in Finland, and 54 in Denmark (the differences are not statistically significant).
- There is a tendency that younger respondents were more satisfied with the outcome of their complaint, compared with older respondents (the average score ranges from 63 among respondents under 35 to 48 among those who are 65+).

The Nordic respondents' attitudes towards the electricity market

The respondents were asked to consider different statements concerning the electricity market.

Figure 40: To what extent do you agree with the following statements ...? Average score: 0=Fully disagree and 100=Fully agree. "Do not know" is excluded. Respondents who had not compared their current contract were not asked whether they regularly compare electricity contracts.



The Nordic respondents agree to a moderate extent that it is easy to switch suppliers (73) and they can save money by switching contracts (67). They also agree somewhat that it is important to have a green electricity contract (60), while they are about evenly split on whether they regularly compare electricity contracts (52). The latter statement has a significantly higher score in 2022 than in 2018 – when the respondents mostly *disagreed* that they regularly compared contracts (average score 46).

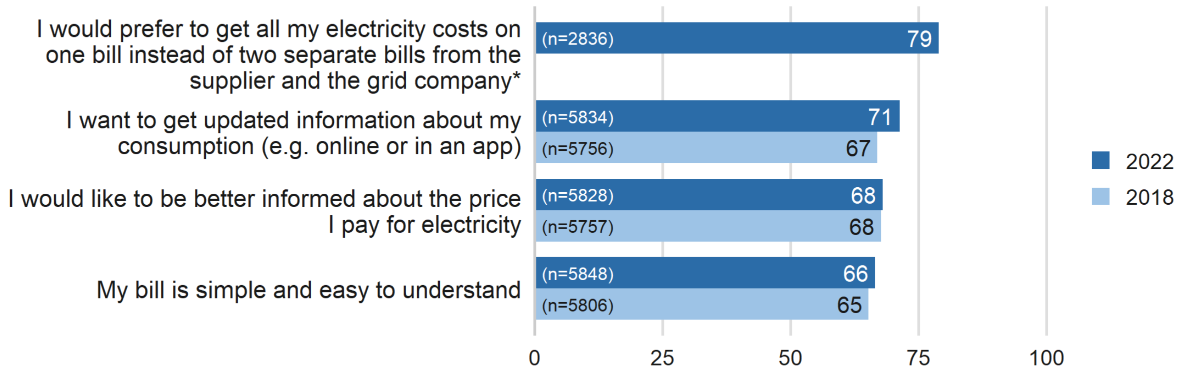
- The score for "It is easy to switch supplier" is highest in Norway (81) and lowest in Sweden (68). In Finland, the score is 74, while it is slightly lower in Denmark (71).
- Denmark stands out with a particularly low score for "I can save money by switching electricity contract" (57). In Norway, the score is 68, in Sweden, 69, and in Finland, 73.
- On the other hand, customers in Denmark care the most about having a green contract (66, compared to 58-59 in the other countries).

- Customers in Finland and Norway tend to *agree* that they regularly compare electricity contracts (56 and 55, respectively), while the Swedish and Danish customers mostly *disagree* (47 and 46, respectively).
- Except for "it is easy to switch supplier", where the degree of agreement *increases* with the age of the respondent, there is an inverse relationship between age and degree of agreement with the statements (scores go down as age increases).
- *Inactive* customers generally express less agreement than do *active* and *aware* customers.
- Respondents whose annual electricity consumption exceeds 20,000 kWh agree the most that they regularly compare electricity contracts (63, compared with 58–52 among respondents who use less electricity).

Billing and information

The respondents were asked to consider different statements concerning billing and information.

Figure 41: To what extent do you agree with the following statements ...? Average score: 0=Fully disagree and 100=Fully agree. "Do not know" is excluded. *= only Finland and Norway (and only in 2022).



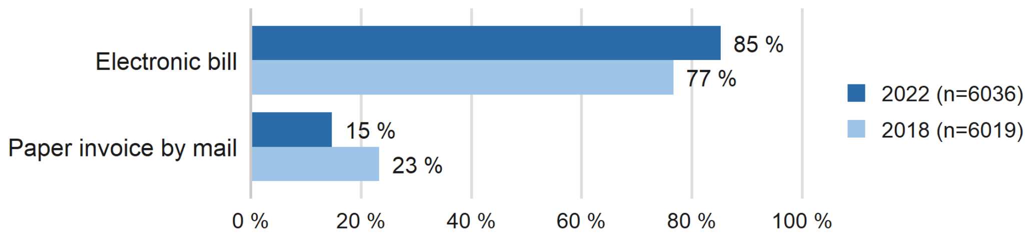
There is a fair amount of agreement among the Nordic respondents that they want to get updated information on their own consumption (e.g., online or in an app), that they would like to be better informed about the price they pay for electricity, and that their bill is easy to understand (scores range from 71 to 66). Their enthusiasm for updated information about their consumption (online or in an app) is significantly higher than in 2018 (71 in 2022; up from 67 in 2018).

- With an average score of 73, the Danish customers agree the most that they would like to be better informed about their electricity price. The score is 70 in Norway and 67 in Sweden – and lowest in Finland, at 63.
- Danish customers agree only somewhat with the statement "My bill is simple and easy to understand" (average score 55). Customers in the other countries express a fair amount of agreement with this; the score is 67 in Sweden, 70 in Norway, and 74 in Finland.
- Respondents in all four countries broadly agree with "I want to get updated information about my consumption (e.g., online or in an app)". Norwegians agree the most (77), and Finns (69) and Swedes (68), the least.
- Younger respondents agree the most that they would like to be better informed about the price they pay for electricity (the score ranges from 71 among respondents under 35 to 64 among those who are 65 or older).
- *Inactive* customers generally express less agreement than do *active* and *aware* customers.

In 2022, Finnish and Norwegian customers were presented with the statement “I would prefer to get all my electricity costs on one bill instead of two separate bills from the supplier and the grid company” – and broadly agreed with this (average score 79). The Norwegians agreed somewhat more strongly than did the Finns (82 and 76, respectively).

The respondents were also given different questions about the electricity bill; about how they receive it, and what information they read on the bill.

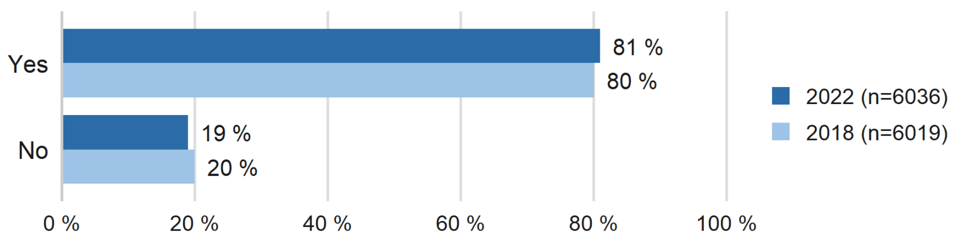
Figure 42: How do you receive your electricity bill?



The vast majority (85%) of the Nordic respondents receive their bill electronically. 15 percent receive it as a paper invoice by mail. The share with paper bills has decreased significantly since 2018, when it comprised almost one-in-four respondents (23%).

- The share of customers who (still) receive their bill as a paper invoice by mail is highest in Finland (28%) – and lowest in Norway and Denmark (7% and 6%, respectively). In Sweden, 18 percent receive paper electricity bills.
- The share of paper bills *decreases* with age – ranging from 19 percent among respondents under 35 to 11 percent among those who are 65 or older.

Figure 43: Do you read the information presented on your electricity bill?

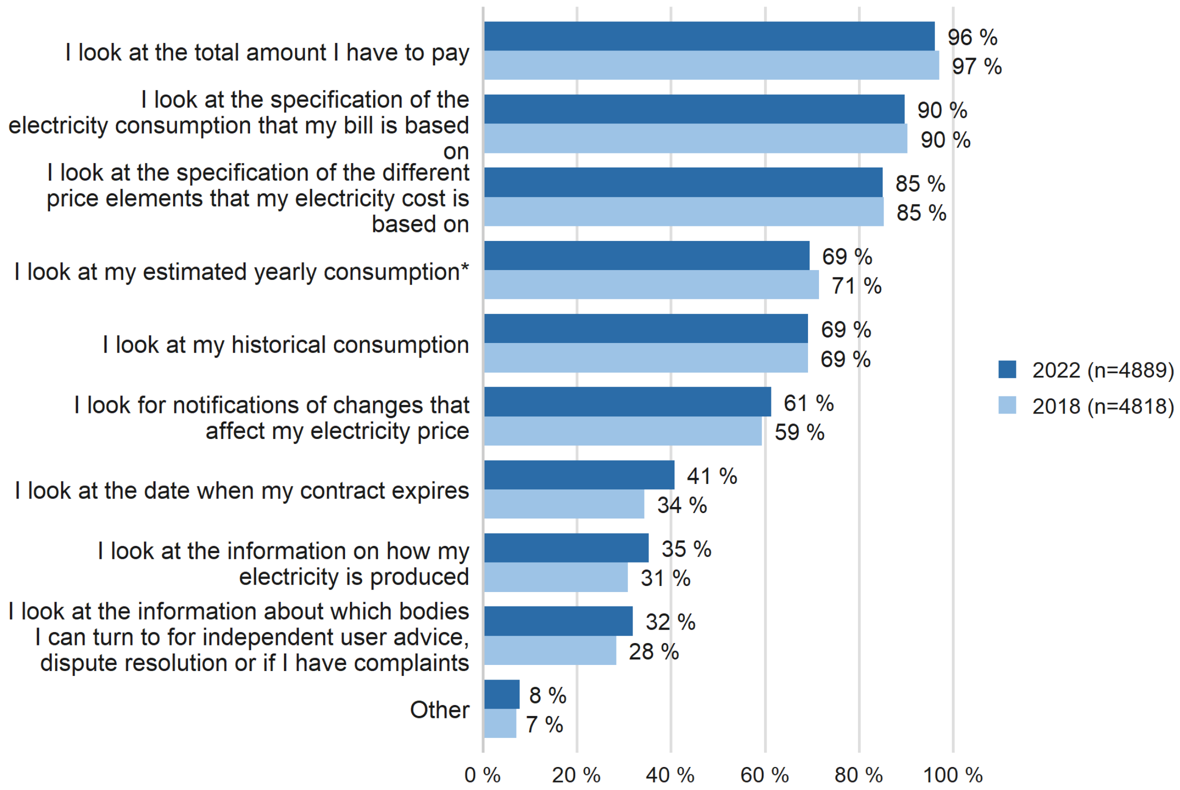


Eighty-one percent say that they read the information presented on their electricity bill. There is no significant difference between 2018 and 2022.

- More respondents in Finland and Norway (both 86%) than in Sweden (78%) and Denmark (74%) say they read the information on their electricity bill.
- The share increases with age – from 77 percent of respondents who are under 35 to 86 percent of those who are 65 or older.
- Larger shares of the *aware* (90%) and *active* customers (89%) read the information on their electricity bill, compared with the *inactive* customers (74%).

Respondents who reported that they read the information presented on their electricity bill were asked which items of this information they read.

Figure 44: What information do you read on your electricity bill? Respondents who say they read their bill. Shares who answer, "Yes".



Almost everyone looks at the total amount they have to pay (96%), and nine-in-ten look at the specification of the electricity consumption on which their bill is based (90%). 85 percent look at the specification of the different price elements on their bill.

Seven-in-ten look at their estimated yearly consumption/their historical consumption (both 69%), and six-in-ten look for notifications of changes that affect their electricity price (61%).

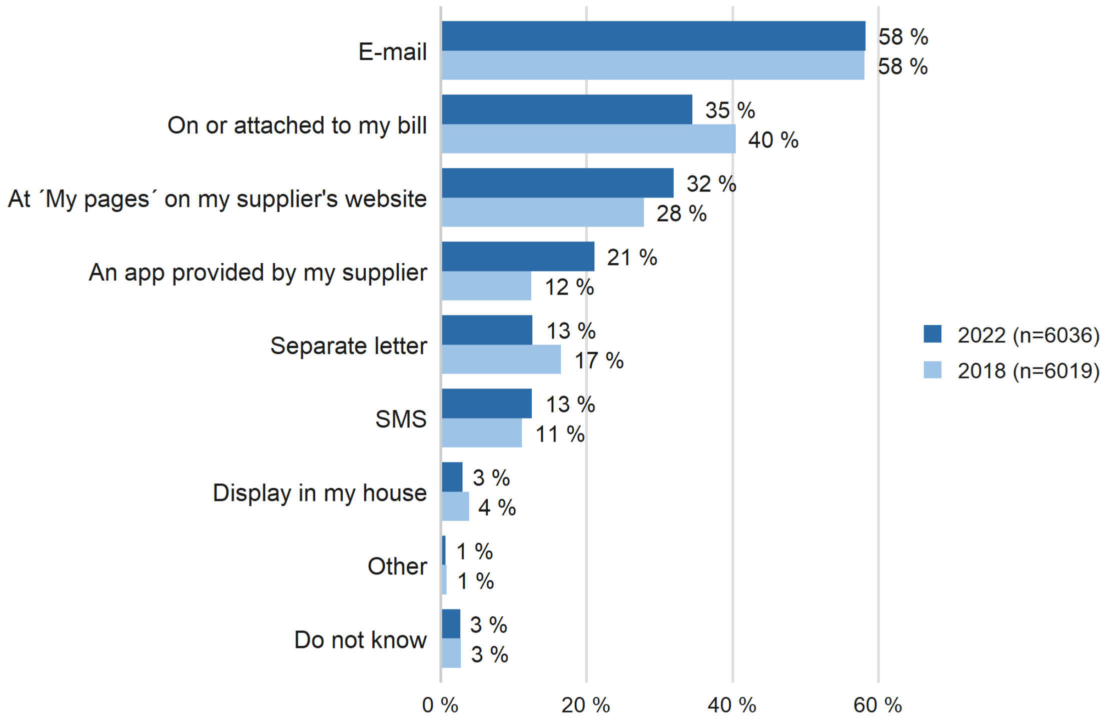
Four-in-ten look at the date when their contract expires (41%; up from 34% in 2018), while around one-third look at information on how their electricity is produced (35%) and information about where to turn for independent user advice, dispute resolution, or with complaints (32%). Compared with 2018, the latter two shares have both increased by four percentage points.

- Paying attention to historical consumption is most common in Norway, where 79 percent say that they look at this information. The share is 68 percent in Denmark, 67 percent in Sweden, and 62 percent in Finland.
- Nine-in-ten Finns say they read the specification of the different price elements that go into their bill (89%). The other respondents are not far behind: 86 percent of the Norwegians, 83 percent of the Swedes, and 81 percent of Danes report that they read this information.
- More Finnish respondents also report that they read their contract's expiration date, 49 percent, compared to 43–33 percent in the other countries. The share is lowest in Norway.
- On the other hand, Finland has the *lowest* share reporting that they look for notifications of changes that affect their electricity price (56%, compared to 61–65%;). Danish respondents are the most inclined to look for this information (65%).
- Swedish respondents are more inclined than the others to look at information about how their electricity is produced (41%, compared to 27–37%). The share who look for this information is lowest in Norway (27%).

- Readership shares generally increase with age – except when it comes to information about where to turn for independent user advice, dispute resolution, or with complaints, for which the share *decreases* with age.
- *Active* and *aware* customers generally read more of the information on their electricity bill than do *inactive* customers.

In conclusion, all respondents were asked how they prefer to get information from their electricity supplier.

Figure 45: How do you prefer to get information from your electricity supplier? Multiple answers possible.



Fifty-eight percent prefer to get information from their electricity supplier via e-mail, and 35 percent want information to be delivered on or attached to their bill. 32 percent prefer "My pages" on their supplier's website.

Twenty-one percent want their information in an app provided by their supplier, while 13 percent prefer a separate letter and/or want information by SMS. Only three percent would prefer to get information from their electricity supplier on a display in their house.

One percent of the respondents prefer other information channels. Three percent do not know their preference.

Compared with 2018, the share who prefer to get information on, or attached to, their bill is down five percentage points (from 40% to 35%). The share who want information from their electricity supplier in a separate letter has also gone down (from 17% to 13%). There is an *increase* for the alternative "My pages" (from 28% to 32%).

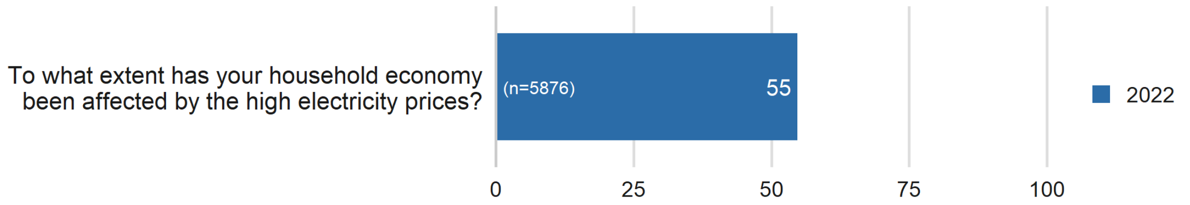
The biggest change since 2018 is to the share who would prefer to get their information in an app. This option was chosen by roughly one-in-ten in 2018 (12%), and roughly one-in-five in 2022 (21%).

- E-mail is preferred by a majority of the respondents in all four countries: 52 percent in Sweden, 59 percent in both Denmark and Norway, and 63 percent in Finland.
- The share who want information on or attached to their bill is also highest in Finland, at 43 percent. 37 percent in Sweden, 31 percent in Norway, and 26 percent in Denmark choose this alternative.
- Only seven percent of the Norwegian and Danish customers want their information in a separate letter. The share is 15 percent in Sweden, while in Finland, as many as one-in-five prefer this delivery method (21%).
- More Norwegian customers want information in an app provided by their supplier (30%), especially compared with the Swedish (17%) and Finnish (15%) customers. In Denmark, 23 percent would prefer an app.
    - Norwegians are also the most inclined to want information via SMS (16%, compared to 10–12% in the other countries).
- The share who want information via "My pages" on their supplier's website is lower in Finland (25%) than in the other three countries (33–35%).
- The share who prefer e-mail increases with age, ranging from 52 percent of respondents under 35 to 64 percent of those who are 65 or older. The share choosing "on or attached to my bill" is also somewhat higher among respondents who are 65 or older (38%), compared with younger respondents (36% of those aged 50–64 and 32% of those under 50).
    - Conversely, larger shares of the younger respondents want their information in an app (25% of those under 50, compared with 14% of those who are 65 or older), via SMS (ranging from 17% to 9%), and on a display in their house (5% to 1%).
- *Inactive* customers are less interested in getting their information in an app (16%), compared to *active* and *aware* customers (26–28%). Lower shares of *inactive* customers also report that they prefer e-mail (55%, compared to 62–63%), "My pages" (30%, compared to 34–35%), and SMS (11%, compared to 14–15%).
- Respondents who receive their electricity bills on paper are more inclined to say that they want information on or attached to their bill (47%, compared with 32% of customers with an electronic bill) or in a separate letter (30%, compared with 10%), and they are *less* inclined to want information via e-mail (43% to 61%), "My pages" (22% to 34%) or an app (11% to 23%).

The price shock

In 2022, two questions were added to the questionnaire to address the issue of extraordinarily high electricity prices. The respondents were asked to evaluate the impact of increased electricity prices on their household economy – and to reflect on whether the high prices would influence their future choice of electricity contract.

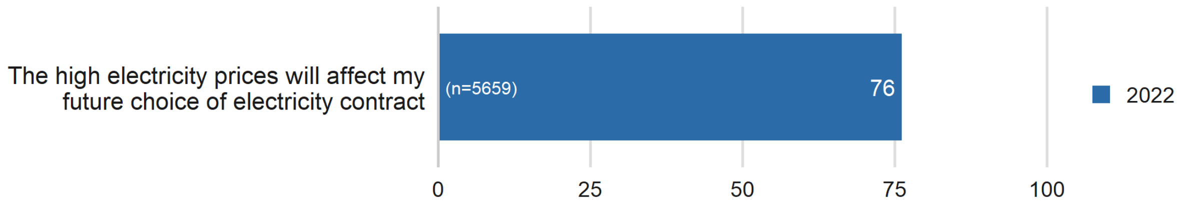
Figure 46: To what extent has your household economy been affected by the high electricity prices? Average scores 0=Not at all and 100=Very high extent. "Do not know" is excluded.



Overall, the Nordic respondents have to some extent experienced that the high electricity prices have affected their household economy (average score 55 on a scale from 0 to 100 where 0 is "not at all" and 100 is "to a very high extent").

- Norwegian (62) and Danish (58) customers report a higher impact on their household economy than the Swedish (50) and Finnish (49) customers do.
- Older customers report that their economy has been affected to a lower extent, compared with younger customers. The average score is 58 among respondents under 35, 60 among those 35–49, 52 among those 50–64, and 48 among those who are 65 or older.
- *Aware* customers report the most impact (59) and *inactive* customers, the least (53).
- Those who live in a house have a higher average score (58) than those who live in an apartment (52).
- Respondents with the lowest consumption levels are less affected by the high energy prices than those who use more electricity (the average score ranges from 47 among those who use less than 5,000 kWh per year to 64 among those who use at least 20,000 kWh).

Figure 47: To what extent do you agree that the high electricity prices will affect your future choice of electricity contract? Average scores 0=Fully disagree and 100=Fully agree. "Do not know" is excluded.



The Nordic respondents express broad agreement that the high electricity prices will affect their future choice of electricity contract (average score 76).

Three percent of the respondents fully disagree, and three percent partly disagree. 23 percent choose the mid- ("neutral") point of the scale, 23 percent party agree, and the largest share – 42 percent – fully agree with the statement. Six percent are unsure.

- The Finnish customers agree most strongly that the prices will affect their future choice of contract (average score 83). In Norway, the score is 78, while it is lower in Sweden (73) and in Denmark (71).
- *Active* (83, high extent) and *aware* (80, high extent) customers tend to agree more with this statement than *inactive* customers (71, moderate extent).

- The extent to which respondents agree with the statement increases along with their annual electricity consumption – with an average score ranging from 75 among those who use less than 5,000 kWh per year to 82 among those who use at least 20,000 kWh per year.

The Danish customers

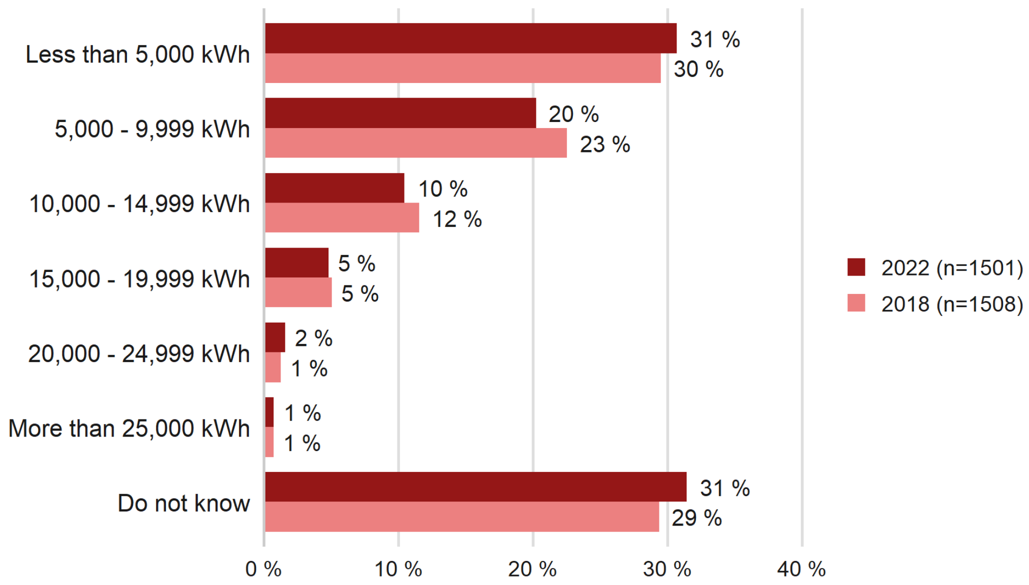
This chapter takes a closer look at the *Danish* electricity customers and their presence and participation in the electricity market, as well as their attitudes towards the Danish electricity market. Interesting and significant differences between subgroups will be remarked upon, and the results in 2022 will, when possible, be compared with the 2018 results.

Note that some results are presented as *average scores* rather than as percentages. This is done when respondents were asked to respond on a five-point scale – for example, from *1 = Fully disagree* to *5 = Fully agree*. The response values have been recoded so that "fully disagree" is set to 0 and "fully agree" is set to 100, with the other categories coded at equal intervals in between. The average of the recoded responses is then presented as a question's "average score" on a scale from 0 to 100. An overview of how these scores are interpreted is available in the methods section of the report.

The Danish customers' presence in the electricity market

The respondents were asked different questions about their presence in the Danish electricity market.

Figure 48: Approximately how many kilowatt-hours do you use each year?



The majority of the Danish respondents use less than 10,000 kWh per year: 31 percent use less than 5,000 kWh per year, and 20 percent use between 5,000 and 9,999 kWh per year. 15 percent use between 10,000 and 19,999 kWh per year, and 3 percent use 20,000 kWh or more per year.

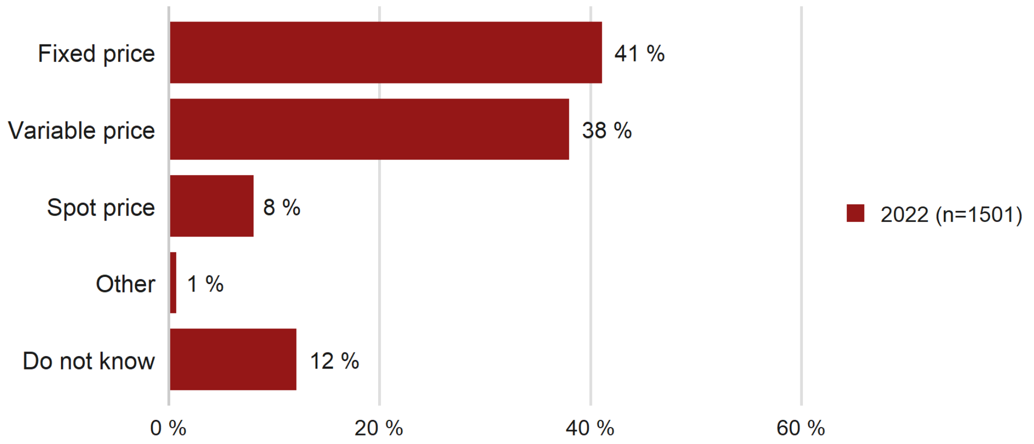
- The youngest respondents report the highest yearly kWh consumption, and there is an inverse relationship between age and yearly kWh consumption.
- Respondents living in apartments report a lower yearly consumption than those who live in houses.
- *Active* customers report a somewhat lower yearly kWh consumption, compared to *aware* and *inactive* customers.

31 percent of the respondents report that they *do not know* how many kWh they use per year. There are no significant differences between 2018 and 2022.

- Respondents who live in apartments are more unsure about their annual kWh use than those who live in houses (37% and 28%, respectively).
- Further, *inactive* customers are more unsure about their annual use (39%), compared to *active* (17%) and *aware* customers (20%).

In 2022, a question about current contract type was added to the questionnaire. [13]

Figure 49: What kind of electricity contract do you have today?



In 2022, the respondents were asked what kind of electricity contract they have. Most of the Danish respondents say they have either a fixed-price contract (41%) or a variable-price contract (38%). Eight percent have a spot-price contract, while one percent have some other type of contract. 12 percent *do not know* what kind of electricity contract they have.[14]

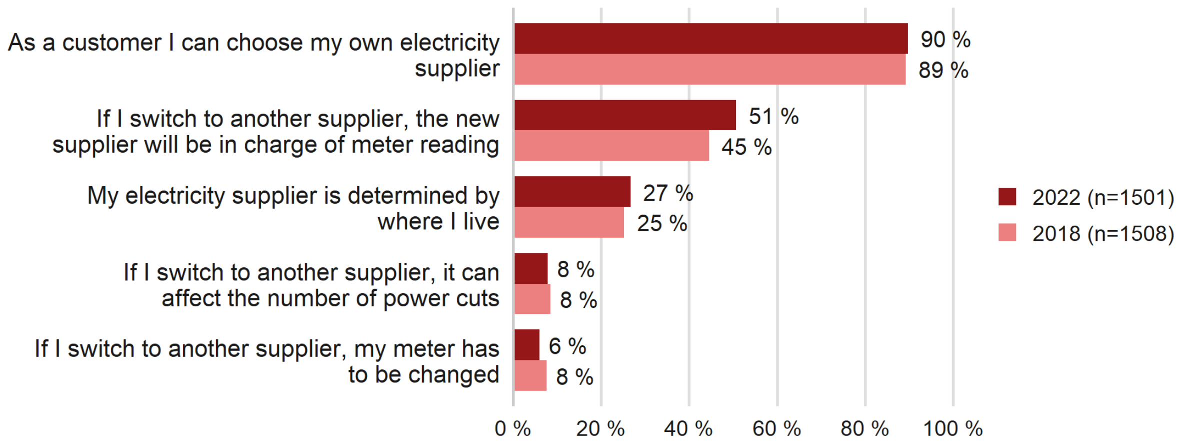
- Spot-price contracts are less common among *inactive* customers (6%) than they are among *active* (13%) and *aware* (12%) customers. Also, *inactive* customers more often report that they are uncertain about what kind of electricity contract they have (15%), compared with *active* (7%) and *aware* (6%) customers.
- Spot-price contracts are somewhat more common among those who live in houses (10%) than among those who live in apartments (6%).

[13] The section “Contract types” (p.22) provides more information about this question.
[14] Note that as this is self-reported information it may diverge considerably from information about contract types gathered by other means.

The Danish customers' knowledge of the electricity market

The electricity customers were asked to consider different statements concerning electricity suppliers and the process of switching suppliers.

Figure 50: Do you believe the following statements are correct or not? Shares who believe that the statements are correct.



The vast majority of the Danish respondents believe that they can choose their own electricity supplier (90%). Further, half believe that if they switch to another supplier, the new supplier will be responsible for meter reading (51%).

Twenty-seven percent believe that their electricity supplier is determined by where they live, while 61 percent believe that this statement is incorrect. Less than 10 percent believe that switching to another supplier can affect the number of power cuts (8%), or that their meter has to be changed if they switch to another supplier (6%). 71 percent and 80 percent, respectively, believe that these statements are incorrect.

Relatively high shares of the respondents say that they don't know whether a new supplier will be in charge of meter reading (25%), or whether changing supplier will affect the number of power cuts (21%).

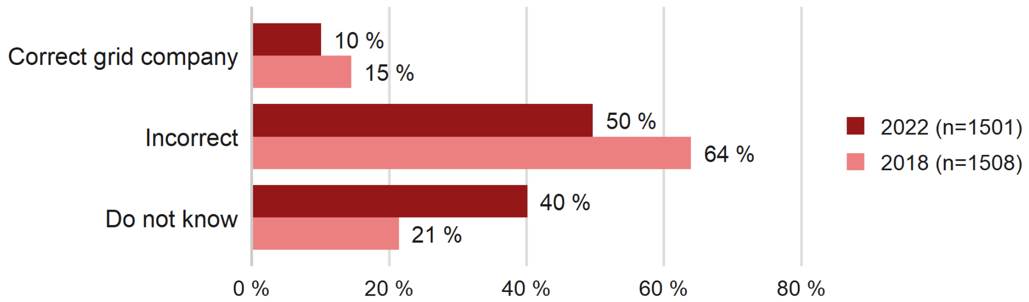
Compared with 2018, a somewhat higher share believe that a new supplier will be in charge of meter reading (51%; up from 45%).

- Generally, respondents under 35 years old tend to have less knowledge of the electricity market, compared to those who are 35 years old or older.
    - There is an association between age and the share who believe that they can choose their own electricity supplier (from 80% of respondents under 35 to 96% of respondents aged 65 or older).
    - Further, there is an association between age and the share who believe that it is *incorrect* that their supplier is determined by where they live (from 42% to 69%), that their meter has to be changed if they switch supplier (from 60% to 89%), and that switching to another supplier can affect the number of power cuts (from 52% to 81%).
- *Active* and *aware* customers tend to have more knowledge about the electricity market than *inactive* customers. The *inactive* customers tend to be more uncertain of whether the statements are correct or not.

- Compared to *active* and *aware* customers, a lower share of *inactive* customers believe that they can choose their own supplier (87%, compared to 94% and 96%) and that the new supplier will be in charge of meter reading (47%, compared to 58% and 56%).
- A lower share of *inactive* customers than *active* and *aware* customers believe that it is *incorrect* that their electricity supplier is determined by where they live (56%, compared to 71%), that their meter has to be changed if they switch supplier (74%, compared to 92% and 86%), and that switching supplier can affect the number of power cuts (67%, compared to 82% and 78%).

The respondents were asked to name the company that operates the power lines to their home, their own electricity supplier, and two other electricity suppliers.

Figure 51: Name the company that operates the power lines to your home[15]



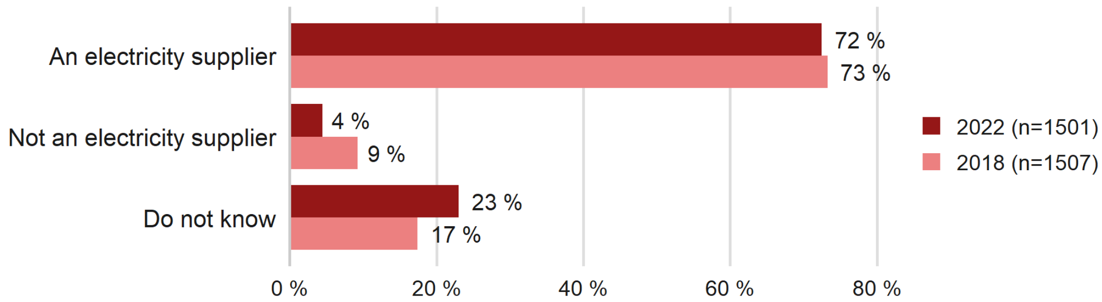
Ten percent of the Danish customers correctly state the name of their grid company. 50 percent respond with either a wrong/outdated name for their grid company, another grid company, or a company that does not exist. 40 percent say that they *do not know* the name of their grid company.

Compared to 2018, a somewhat lower share give the correct name of their grid company (10%; down from 15%). Also, a higher share respond that they *do not know* the name of their grid company (40% in 2022 and 21% in 2018).[16]

- A higher share of respondents under 35 respond that they *do not know* the name of their grid company (52%), compared to older respondents (34–44%).
- A higher share of *active* customers state the correct name of their grid company (15%), compared to *aware* (12%) and *inactive* customers (8%).

[15] This variable is based on the respondents' postal codes. It should be taken into account that the postal codes may be incorrect (e.g., if respondents have moved, etc.).
[16] Note that many grid companies have changed names between 2018 and 2022.

Figure 52: Who is the electricity supplier in your home?

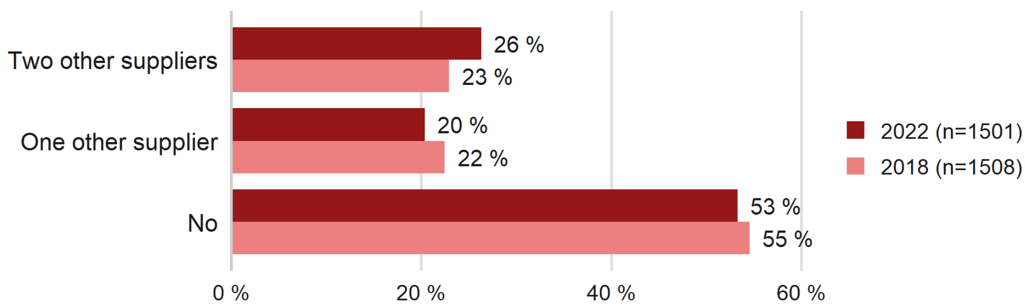


Seventy-two percent of the Danish customers state the name of an actual electricity supplier.[17] Four percent state something else than an actual electricity supplier, and 23 percent respond that they *do not know* the name of their electricity supplier.

Compared to 2018, there is a somewhat lower share that state something else than an actual electricity supplier (4%; down from 9% in 2018), and a somewhat higher share that state they *do not know* who their electricity supplier is (23%; up from 17% in 2018).

- There is an association between age and the share who state the correct name of their electricity supplier (from 55% among respondents under 35 to 82% among respondents who are 65 or older).
- A higher share of *active* customers state the correct name of their electricity supplier (82%), compared to *aware* (72%) and *inactive* customers (68%).
- There is a higher share among respondents living in a house who state the correct name of their electricity supplier (76%), compared to respondents who live in an apartment (68%).
- A somewhat higher share of respondents who have a spot-price contract state the correct name of their electricity supplier (83%), compared to respondents who have a fixed-price contract (71%) or a variable-price contract (74%).
- There is a higher share of respondents who receive their bill electronically who state the correct name of their electricity supplier (74%), compared to respondents who receive their bill as a paper invoice by mail (48%).

Figure 53: Can you name two other electricity suppliers?



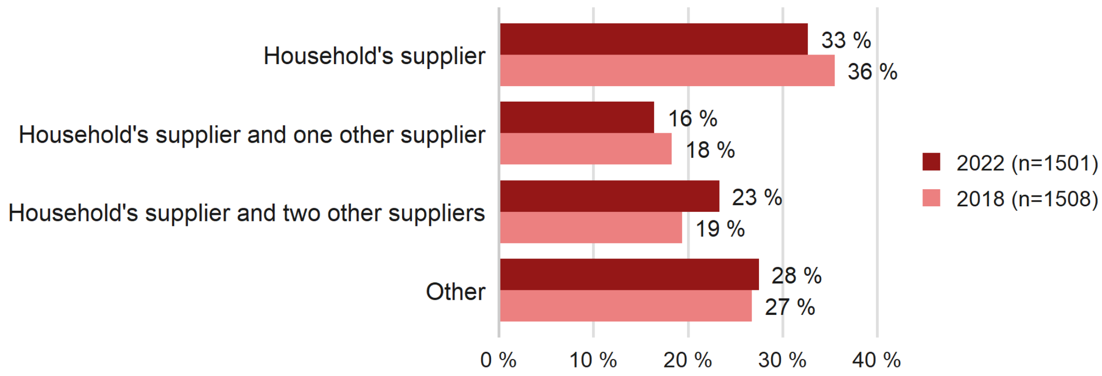
Twenty-six percent of the Danish customers state the name of two other electricity suppliers, and 20 percent state the name of one other supplier. 53 percent cannot name any other suppliers.

[17] We cannot know whether this is *their* actual electricity supplier or just some supplier.

There are only small differences, compared with 2018.

- A higher share of *active* (46%) and *aware* (36%) customers were able to name two other suppliers, compared to *inactive* customers (18%). Further, a higher share of *inactive* customers cannot name any other suppliers (64%), compared with *active* (28%) and *aware* customers (43%).
- A higher share of respondents with a spot-price contract were able to name two other suppliers (39%), compared to those who have a fixed-price (24%) or variable-price contract (29%). Among those who have a fixed-price contract, a higher share cannot name any other suppliers (57%), compared with customers who have a variable-price contract (48%) or spot-price contract (40%)
- More among those who receive their bill electronically were able to name two other suppliers (27%), compared to those who receive a paper invoice by mail (15%). A lower share of those who receive their bill electronically were unable to name other suppliers (52%), compared with those who receive their bill as a paper invoice (68%).

Figure 54: Total knowledge of electricity suppliers.



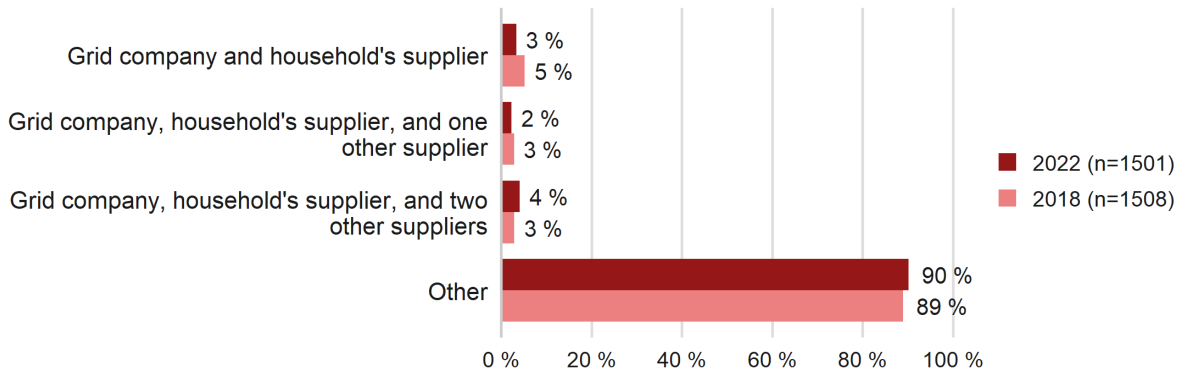
One-third of the Danish customers know only their household's supplier. 16 percent also know the name of one other supplier, while 23 percent know both their household's supplier and two other suppliers. 28 percent have stated something other than an actual electricity supplier (a grid company or something else), or that they do not know.

There are only small differences between 2018 and 2022.

- Younger respondents generally have less knowledge of electricity suppliers than older respondents. A lower share of those under 35 were able to name their household's supplier and two other suppliers (17%, compared to 23–25% among older respondents). Further, there is an inverse relationship between age and the share who have stated something other than an actual electricity supplier, ranging from 45 percent among those under 35 to 18 percent among respondents aged 65 or older.
- *Inactive* customers generally have less knowledge of electricity suppliers than *active* and *aware* customers. While 32 percent of *inactive* customers stated something that is not an electricity supplier, this applies to 18 percent of *active* customers and 22 percent of *aware* customers. Further, while *inactive* customers tend to know only the name of their own supplier, higher shares of *active* and *aware* customers can also name other suppliers.
- Respondents who have a spot-price contract tend to have better knowledge of suppliers than others.

    - A higher share of respondents who have a spot-price contract can name both their own supplier and two other electricity suppliers (36%), compared to respondents with a fixed-price contract (22%) or a variable-price contract (25%).
    - A lower share of respondents who have a spot-price contract state something other than an actual electricity supplier (17%), compared to respondents with a fixed-price contract (29%) or a variable-price contract (26%).
- Respondents who live in houses have somewhat more knowledge of electricity suppliers, compared to respondents who live in apartments.
    - Twenty-six percent of those who live in a house state both their household's supplier and two other suppliers, compared with 19 percent of those who live in an apartment.
    - Thirty-two percent of those living in apartments state something else than their supplier, compared to 24 percent of those living in a house.
- Respondents who receive their bill electronically generally have more knowledge of electricity suppliers, compared to respondents who receive their bill on a paper invoice by mail.
    - Twenty-four percent of those who receive their bill electronically state both their supplier and two other suppliers, compared to 12 percent of those who receive a paper invoice by mail.
    - Twenty-six percent of those who receive their bill electronically state something else than their electricity supplier, compared with 52 percent of those who receive paper bills.

Figure 55: Total knowledge of the electricity market.



Three percent of the Danish customers name both the correct company operating power lines to their home *and* one actual electricity supplier. Two percent know of both their grid company, their own supplier, and one *other* electricity supplier. Four percent know of their grid company, their electricity supplier, and *two other* electricity suppliers.

Nine-in-ten Danish customers cannot name the correct company operating the power lines and at least one actual electricity supplier.

There are no significant differences between 2018 and 2022.

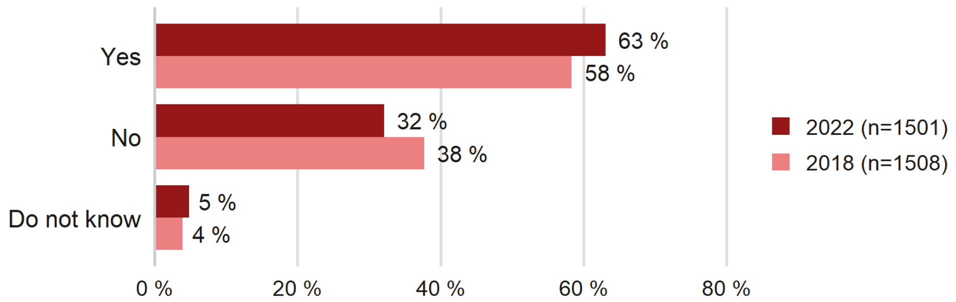
- A somewhat higher share of *inactive* customers have poor knowledge of the electricity market (92%), compared to *active* (85%) and *aware* customers (88%).

The Danish customers' participation in the electricity market

Electricity customers were also asked different questions related to their participation in the electricity market, including the process of switching and comparing electricity contracts, the use of comparison tools, as well as knowledge of contractual terms.

Signing and comparing contracts

Figure 56: Have you ever signed a contract with an electricity supplier?



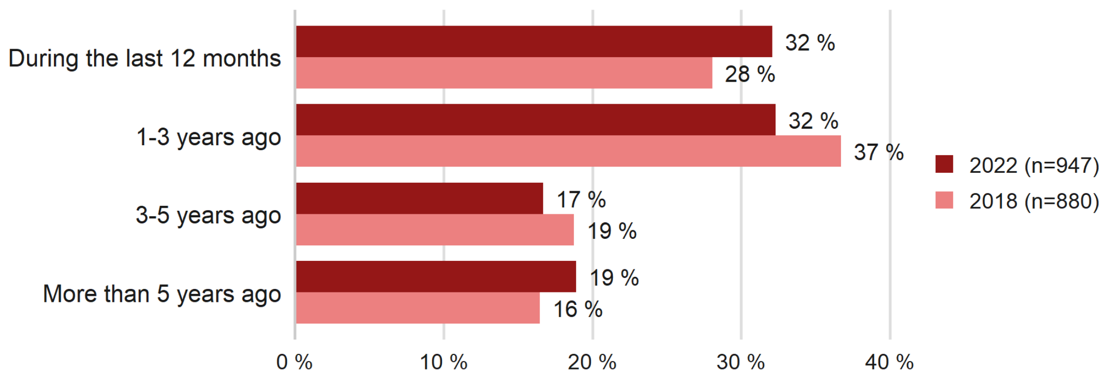
Sixty-three percent of the Danish respondents have signed a contract with an electricity supplier. 32 percent have never signed an electricity contract, and five percent are not sure.

Compared with 2018, there is a small increase in the share who have signed an electricity contract.

- A higher share of those who have a spot-price contract have signed a contract (78%), compared to those who have a variable-price contract (67%) or a fixed-price contract (63%).

Respondents who had signed a contract with an electricity supplier were asked when they last did this.

Figure 57: When did you last sign a new contract with an electricity supplier? Percent of respondents who have ever signed a contract.



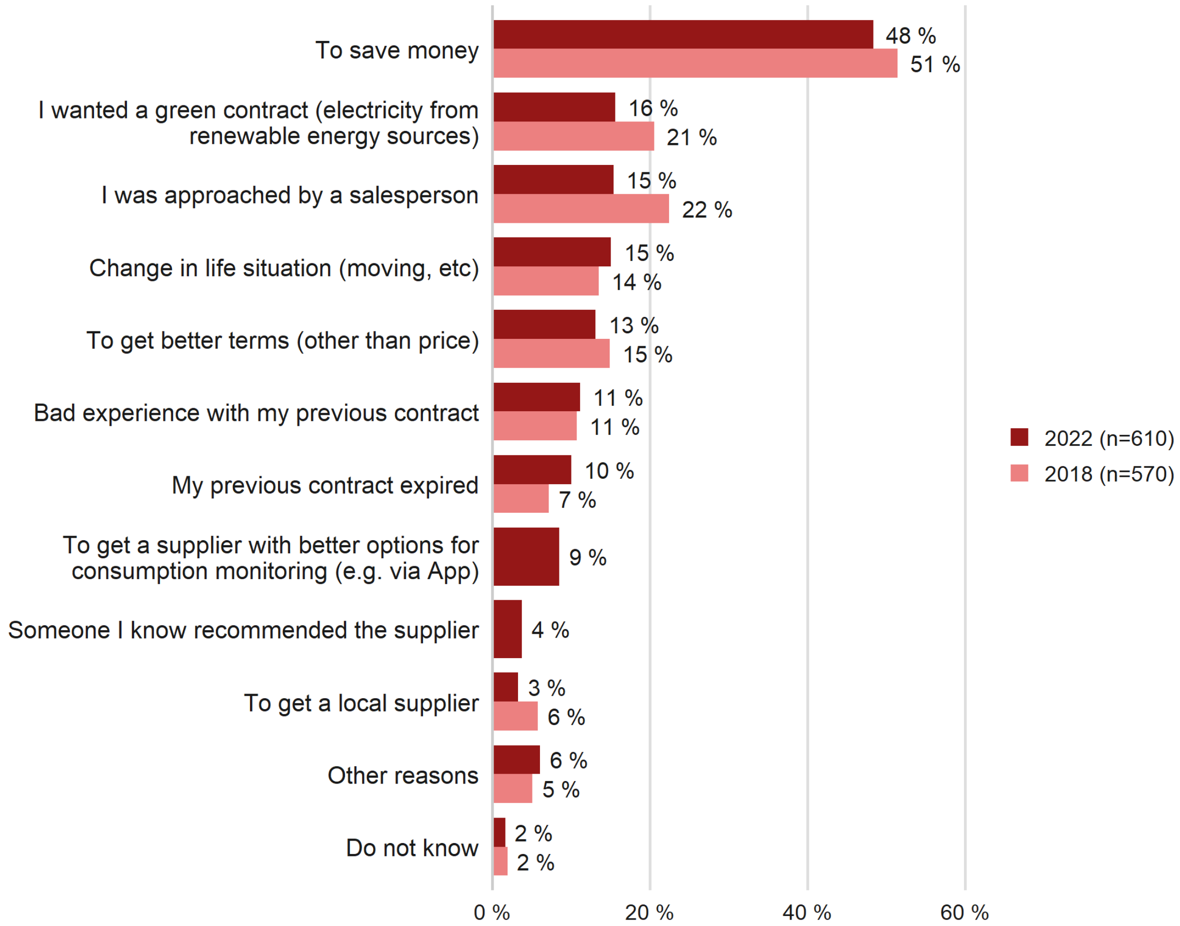
One-third of customers who have signed a contract did so less than one year ago, and are considered *active* customers. 32 percent signed a contract 1–3 years ago, 17 percent signed a contract 3–5 years ago, and 19 percent signed a contract more than five years ago.

There are no significant changes from 2018 to 2022.

- The respondents under 35 more often signed the contract 1–3 years ago, and less often signed the contract more than five years ago (7%), compared with older respondents (28–33% and 19–23% respectively).
- A lower share of those who have a variable-price contract (27%) have signed a contract during the last 12 months, compared with those who have a fixed-price contract (36%) or a spot-price contract (43%).

The electricity customers who have signed new contracts in the past three years were asked why they signed a new contract.

Figure 58: Why did you sign a new electricity contract? Multiple answers possible. Respondents who signed a contract in the past three years.



Almost half state that they signed a new contract to save money (48%). This was also the most common reason for signing a new electricity contract in 2018.

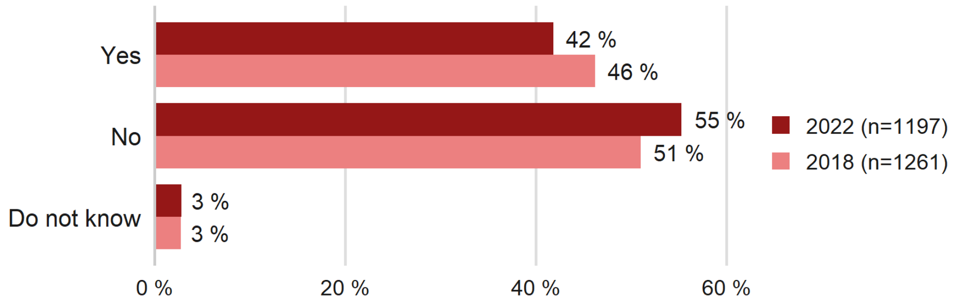
Sixteen percent wanted a green contract, 15 percent were approached by a salesperson, 15 percent signed the contract due to a change in their life situation, and 13 percent wanted to get better terms (other than price). Between nine and 11 percent signed a new contract due to bad experience with the previous contract, due to expired contract, or to get better options for consumption monitoring. It is less common to have signed a new contract because someone recommended the supplier (4%) or to get a local supplier (3%). Six percent stated other reasons, and two percent are uncertain.

A lower share was approached by a salesperson in 2022 (15%) than in 2018 (22%).

- It is more common among younger respondents to have signed the new contract due to a change in their life situation than it is among older respondents (ranging from 30% among those under 35 to 6% among those aged 65 or older). Further, it is less common that those under 35 have signed a new contract to save money (31%), compared with older respondents (48–56%).
- A higher share of *aware* customers signed the new contract because of bad experiences with the previous contract (20%), compared with *active* (9%) and *inactive* customers (9%).
- A larger share of those living in apartments state that they wanted a green contract (21%), compared to those living in houses (12%).

Respondents who are not considered to be active (signed a contract in the past year), were asked whether they have *compared* their current contract to other contracts.

Figure 59: Have you ever compared your current electricity contract to other contracts? Percent of respondents who have not signed a contract in the past 12 months (aware and inactive customers).

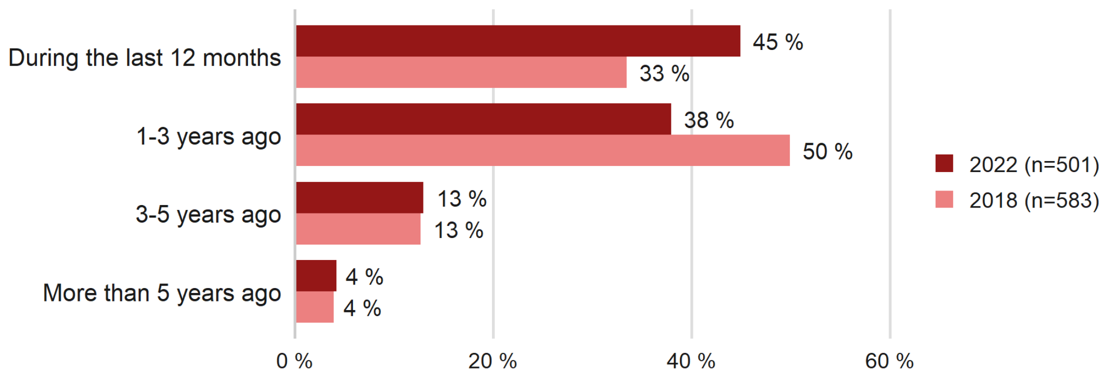


Forty-two percent of the Danish respondents who are not considered to be active (*aware* and *inactive* customers – those who have not signed a contract in the past 12 months) have compared their current electricity contract to other contracts. More than half have never made such a comparison (55%).

Compared with 2018, there are no significant changes. There are no significant differences between subgroups.

Electricity customers who have compared their own contracts with others were asked when they most recently did this.

Figure 60: When did you last compare your current electricity contract to other contracts? Percent of respondents who have ever compared contracts.



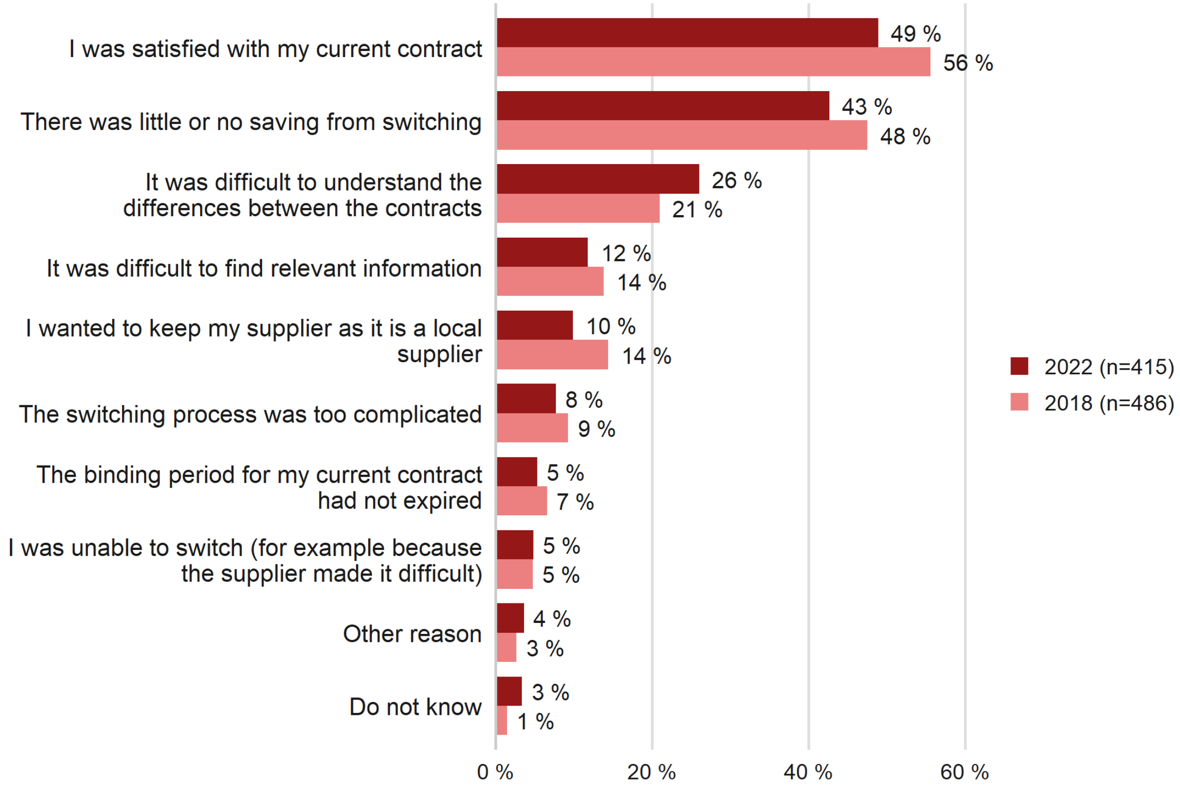
Forty-five percent of the respondents who have compared their current contract to others did so during the last 12 months. 38 percent compared their contract to others 1–3 years ago, 13 percent did so 3–5 years ago, and 4 percent made the comparison more than five years ago.

A larger share compared their contract during the last 12 months (45%), and a smaller share did so 1–3 years ago (38%), compared with 2018 (33% and 50% respectively).

There are no significant differences between subgroups.

Those who have compared their contract to others during the last three years, and who have not switched or signed a new contract, were asked why they chose to keep their current contract.

Figure 61: You have compared different offers but decided to stay in your current contract. Why? Multiple answers possible. Percent of respondents who have compared contracts in the past three years but not switched.



About half respond that they chose to stay in their current contract because they were satisfied with it. Approximately four-in-ten state that there was little or no saving from switching.

Twenty-six percent state that it was difficult to understand the differences between contracts, and 12 percent respond that it was difficult to find relevant information. 10 percent wanted to keep their supplier as it is a local supplier. It was less common to stay in the current contract because the switching process was too complicated (8%), because the binding period had not expired (5%), and because one was unable to switch (5%).

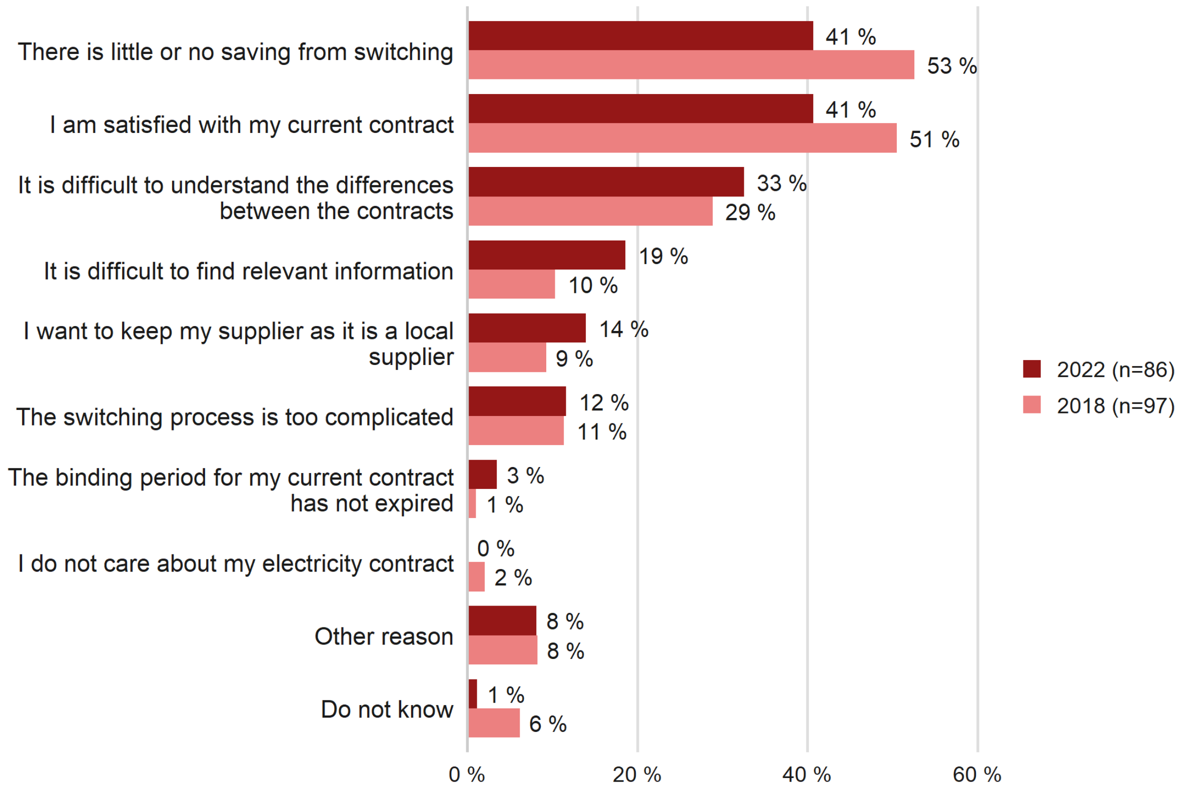
Four percent state other reasons for deciding to stay in the current contract, and three percent are unsure.

There are no significant differences between 2018 and 2022.

- There is an association between age and the share of respondents who say that they chose to stay in their current contract because they were satisfied with it (from 37% among those under 35 to 64% among those 65 or older). Similarly, there is an association between age and the share who say there was little or no saving from switching (from 32% to 54%). There is an inverse relationship between age and the shares who respond that the switching process was too complicated (from 15% of those under 35 to 1% of those aged 65 or older), that the binding period had not expired (from 12% to 2%), and that they were unable to switch (from 11% to 0%).
- A higher share of those who use less than 5,000 kWh per year respond that there was little or no saving from switching (57%), compared with those who use more electricity (31–50%).

Those who have neither switched nor compared contracts in the past three years were asked why they have not done so more often.

Figure 62: Why have you not switched or compared contracts more often? Multiple answers possible. Percent of respondents who have neither signed a new contract nor compared contracts in the past three years.



Four-in-ten answer that they have not switched or compared more often because there is little or no saving from switching. Further, four-in-ten state that they are satisfied with their current contract, and one-third state that it is difficult to understand the differences between contracts.

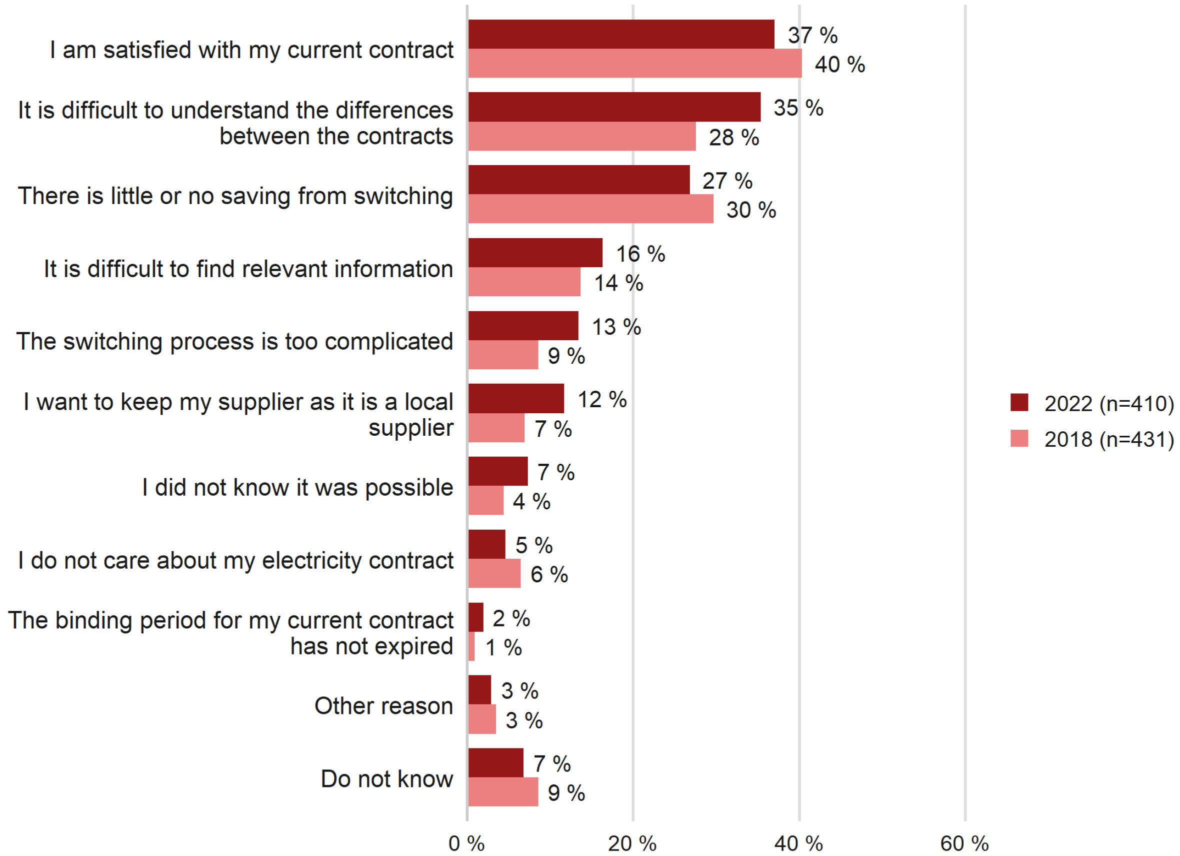
Nineteen percent respond that it is difficult to find relevant information, 12 percent respond that the switching process is too complicated, and 14 percent want to keep their supplier as it is a local supplier. It is less common that respondents have not switched or compared contracts due to the binding period of their current contract (3%).

Eight percent stated other reasons, and one percent are unsure.

There are no significant changes from 2018 to 2022, and no significant differences between subgroups.

Those who had never switched or compared contracts were asked why they had never done this.

Figure 63: Why have you never switched or compared contracts? Multiple answers possible. Respondents who have never switched or compared contracts.



The most common reasons for never switching or comparing contracts are satisfaction with the current contract (37%) and finding it difficult to understand the differences between contracts (35%). Also, more than one-quarter respond that there is little or no saving from switching (27%).

Sixteen percent respond that it is difficult to find relevant information, 13 percent, that the switching process is too complicated, and 12 percent want to keep their supplier as it is a local supplier. It is less common that respondents have never switched or compared contracts because they did not know it was possible (7%), they do not care about their electricity contract (5%), or because their binding period has not expired (2%).

Three percent give other reasons, and seven percent are unsure.

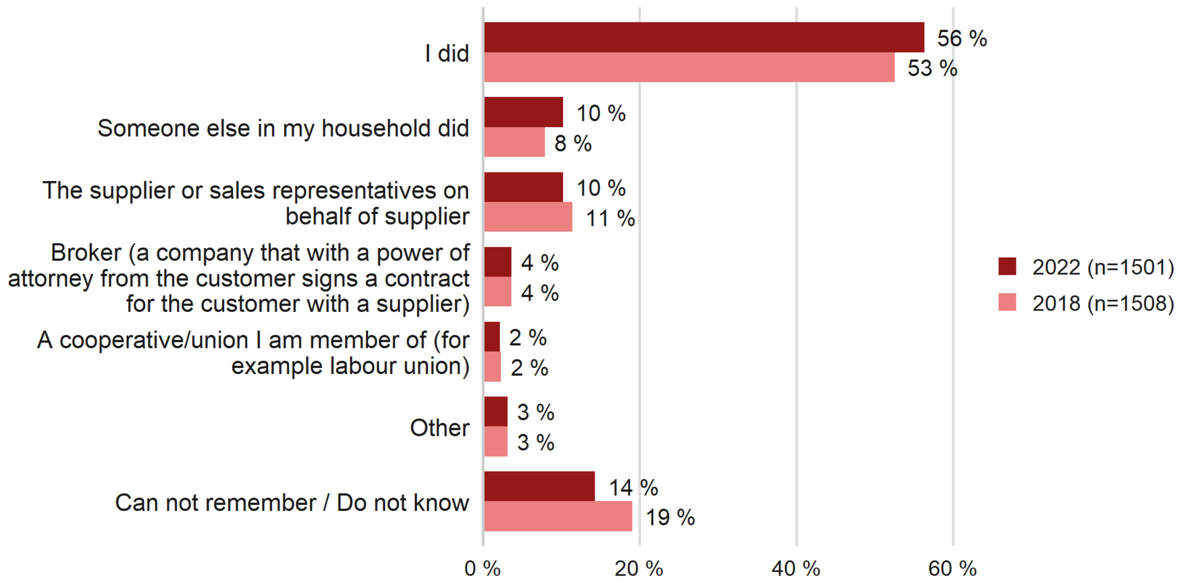
There are no significant changes from 2018 to 2022.

- A larger share of those over 65 years old respond that they are satisfied with their current contract (52%), compared with younger respondents (25–39%). 17 percent of those under 35, and nine percent of those aged 35–49, say that they did not know it was possible. In comparison, less than five percent of those aged 50 or older say this.

The contract-signing process

The respondents were asked questions related to the signing process, including who initiated the signing of their current contract, how they proceeded to choose the contract, how they were contacted, etc.

Figure 64: Who initiated the signing of your current contract?



The majority of the Danish customers initiated the signing of their current contract themselves (56%). One-in-ten say that someone else in their household initiated the contract signing.

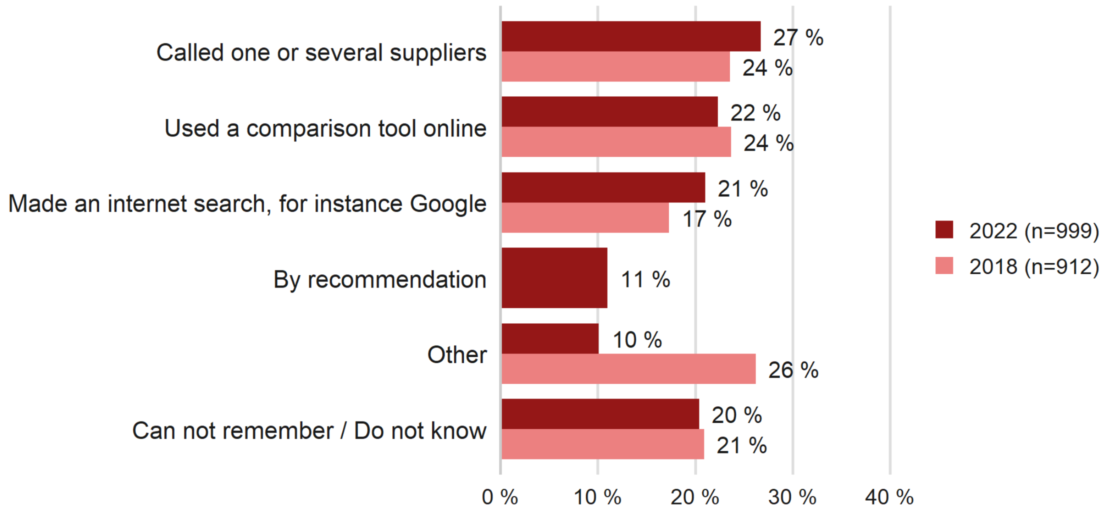
A further one-in-ten respond that the signing was initiated by the supplier or sales representatives on behalf of the supplier. It is less common that a broker (4%), a cooperative/union (2%) or other (3%) initiated the signing. 14 percent respond that they don't know or cannot remember.

Compared with 2018, a somewhat lower share say that they don't know or remember who initiated the signing of their current contract.

- Somewhat lower shares of respondents under 50 (48–53%) signed the contract themselves, compared to respondents who are 50 years old or older (60–61%). The share whose contract was initiated by someone else in their household is higher among respondents under 50 years old (13%) than among those 50 or older (7–8%). Further, larger proportions of those under 35 years old respond that a broker (8%) or a cooperative/union (5%) initiated the signing of the contract, compared to those aged 35 years or older (2–4%, and 1–2%, respectively).
- The shares who initiated the signing of their current contract themselves are highest among *active* (75%) and *aware* (67%) customers, and lowest among *inactive* customers (48%). Further, higher shares of *aware* (12%) and *inactive* (11%) customers say that someone else in their household signed the contract, compared to *active* customers (6%). 20 percent of the *inactive* customers are unsure (this applies to 1% of *active* and 6% of *aware* customers).

Those electricity customers who responded that either they or someone else in their household initiated the signing of their current contract were asked how they *chose* the contract.

Figure 65: How did you go about choosing electricity contract? Multiple answers possible. If signing initiated within own household.



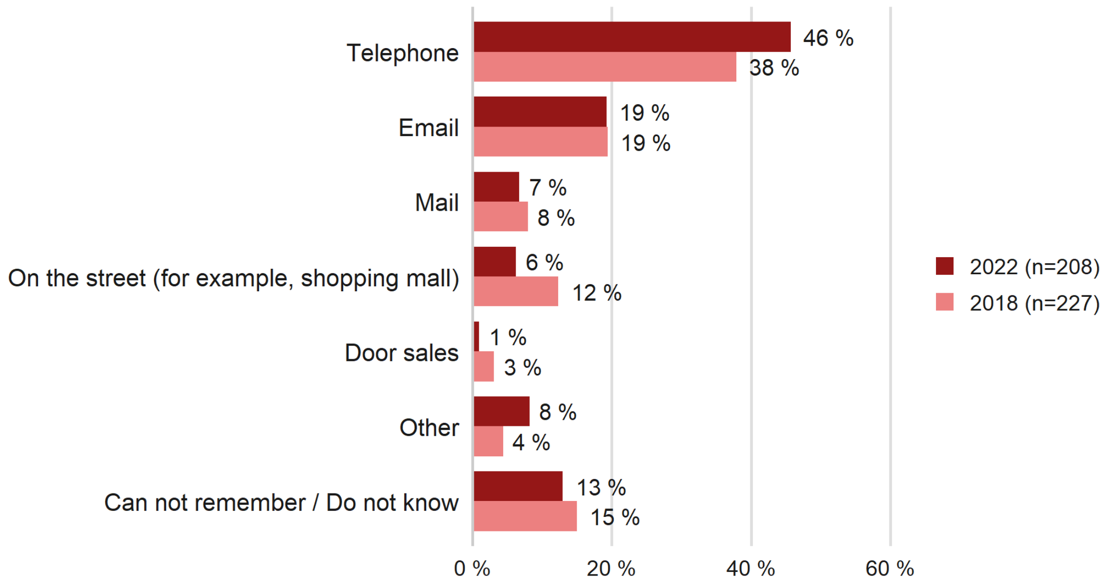
Twenty-seven percent called one or several suppliers before they chose a contract, 22 percent used an online comparison tool, and 21 percent made an internet search. 11 percent made the choice due to recommendation by others, and 10 percent used other methods. 20 percent cannot remember how they made the choice.

The share of respondents who respond that they used other methods, is lower in 2022 than in 2018 (note that “By recommendation” was added to the questionnaire in 2022).

- The share who respond that they made an internet search is highest among those under 35 (31%) and decreases with age (to 14% of those who are 65 or older). There are associations between age and the shares who report using other methods (from 4% of those under 35 to 12% of those who are 65 years old or older) or say that they cannot remember how the choice was made (from 8% to 29%).
- The *active* (27%) and *aware* (32%) customers more often used an online comparison tool than the *inactive* customers (17%). Also, higher shares of the *active* (25%) and *aware* (27%) customers made an internet search, compared to *inactive* customers (17%). A higher share of the *inactive* customers respond that they cannot remember how the choice was made (29%), compared to *active* (8%) and *aware* (10%) customers.

Respondents who say they were contacted by an electricity supplier or broker were asked *how* they were contacted.

Figure 66: How did they contact you? Percent of respondents who were contacted by a supplier or broker.



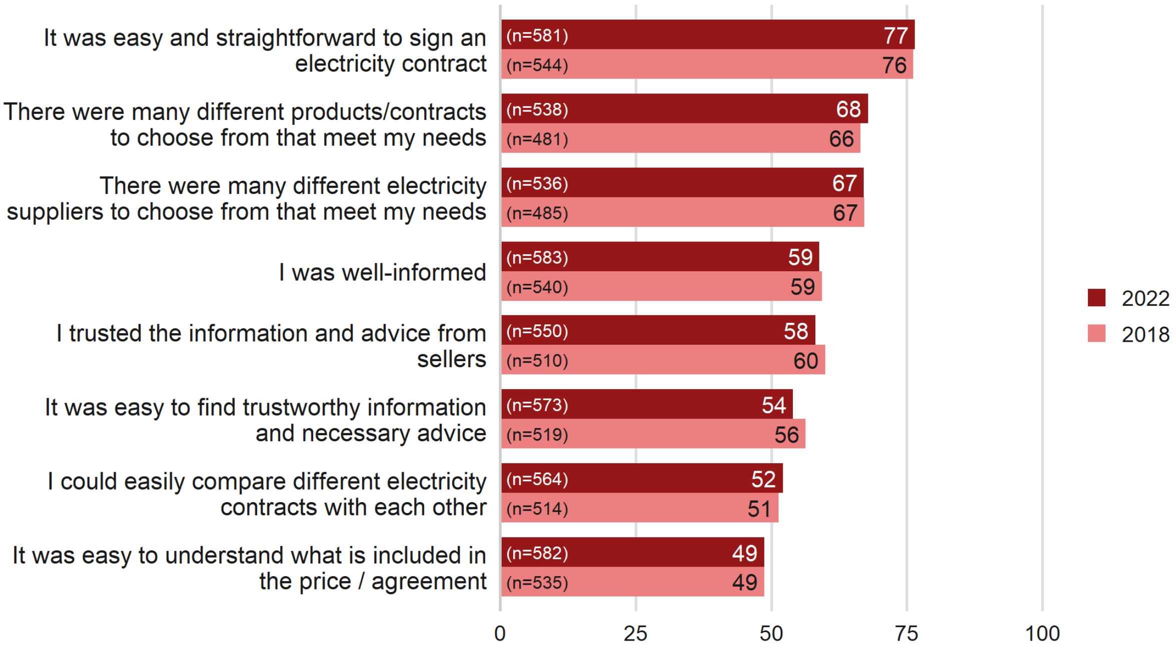
Forty-six percent of those who were contacted by an electricity supplier or broker were contacted by phone. 19 percent were contacted by email, seven percent by mail, and six percent were approached on the street. One percent were contacted via door sales, and eight percent stated other forms of contact. 13 percent cannot remember how they were contacted.

There are no significant differences compared with 2018.

- There is an inverse relationship between age and the share who were contacted by email, from 32 percent of those under 35 years old to seven percent of those 65 or older.

Respondents who have signed a new contract in the past three years were asked to consider different statements related to this process.

Figure 67: Before you made your current choice of electricity contract, to what extent did you experience the following ... ? Average scores: 0=Not at all and 100=High extent. "Do not know" is excluded. Respondents who have signed a new contract in the past three years.



The Danish respondents who have signed a new contract the past three years experienced to a high extent that it was easy and straightforward to sign an electricity contract (average score 77 out of 100). Further, they experienced to a moderate extent that there were many different products/contracts (68) and electricity suppliers (67) to choose from that meet their needs.

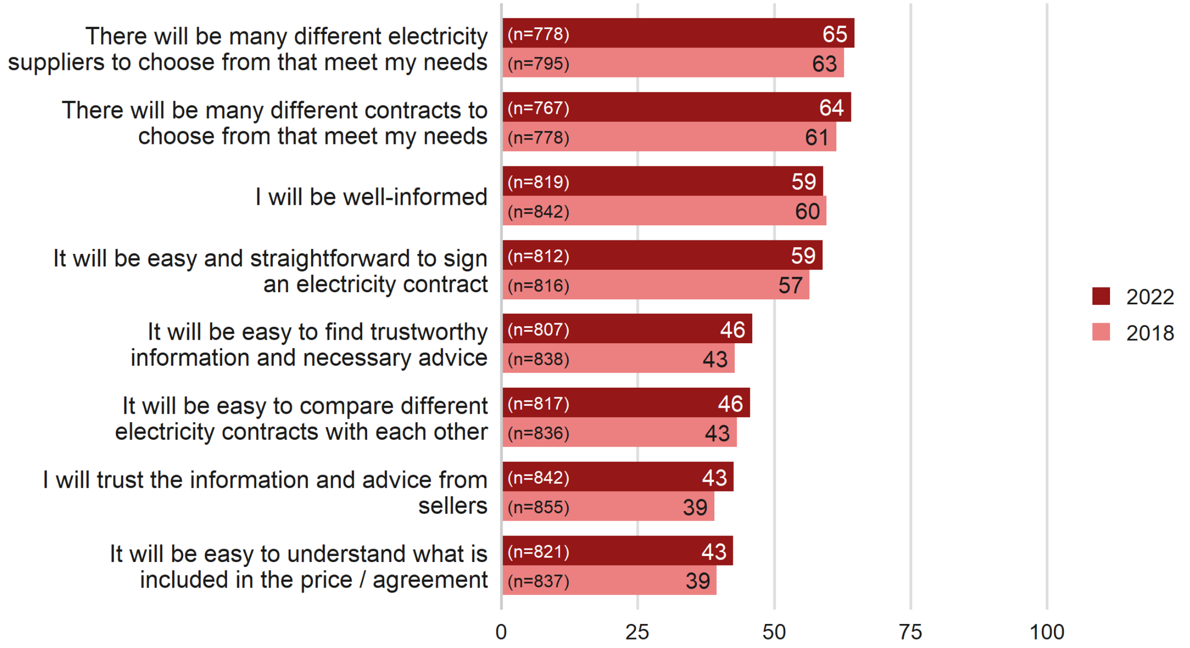
The respondents have to some extent experienced to be well-informed (59) and agree to some extent that they trusted the information and advice from sellers (58). The results are split when it comes to whether they experienced that it was easy to find trustworthy information and necessary advice (54), that they could easily compare different electricity contracts with each other (52), and that it was easy to understand what is included in the price/agreement (49).

There are no significant changes from 2018 to 2022.

- Those under 35 years old more often agree that they could easily compare different electricity contracts to each other (61), compared to respondents who are 35 or older (48–53). Further, the youngest respondents agree to a somewhat higher extent that it was easy to understand what is included in the price/agreement (56), compared to older respondents (44–48). Respondents who are 50 or older were even more likely to have experienced that it was easy and straightforward to sign an electricity contract (79-80), compared to younger respondents (72-73).
- The *active* (61) and *aware* (60) customers on average felt more well-informed than the *inactive* ones (54). Further, the *inactive* customers are generally more unsure than *active* and *aware* customers.

Those who have *not* signed a new contract in the past three years were asked to consider different statements concerning a potential future process of choosing an electricity contract.

Figure 68: If you in the future would like to choose an electricity contract, to what extent do you agree that …? Average scores: 0=Not at all and 100=High extent. "Do not know" is excluded. Respondents who have not signed a new electricity contract in the past three years.



The Danish respondents who have *not* signed a new contract in the past three years, agree to a moderate degree that there will be many different electricity suppliers to choose from that meet their needs (65), and agree to some extent that there will be many contracts (64) to choose from that meet their needs – if they would like to choose an electricity contract in the future. They somewhat degree that they will be well-informed (59) and that it will be easy and straightforward to sign an electricity contract (59).

The respondents tend to disagree that it will be easy to find trustworthy information and necessary advice (46) and that it will be easy to compare different electricity contracts with each other (46). They mostly disagree that they will trust information and advice from sellers (43) and that it will be easy to understand what is included in the price/agreement (43).

There are no significant changes from 2018 to 2022.

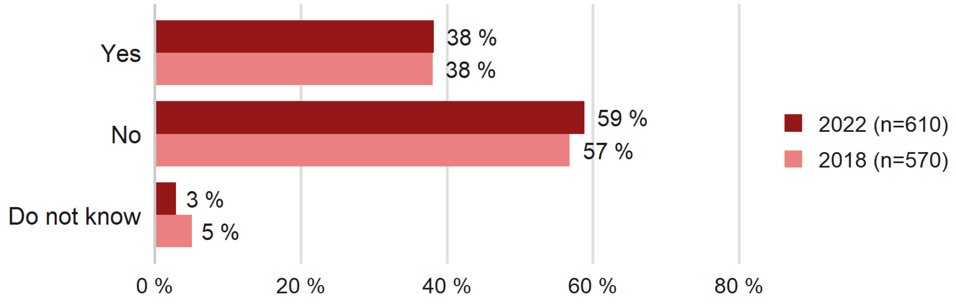
- Compared with younger respondents, respondents who are 50 or older tend to disagree more strongly with the statements that it will be easy to understand what is included in the price/agreement (37, compared to 47-52 among younger respondents), that it will be easy to find trustworthy information and necessary advice (40-43, compared to 51 among younger respondents), and that they will trust information and advice from sellers (38, compared to 47-51 among younger respondents). Also, there is an association between age and degree of disagreement with the statement that it will be easy to compare different electricity contracts with each other, ranging from 53 among respondents under 35 years old to 40 among respondents who are 65 years old or older.
- The *aware* (68) customers on average believe that they will be more well-informed than the *inactive* ones (58). Further, *inactive* customers generally tend to be more unsure than *aware* customers.

Comparison tools

The respondents were also asked different questions about comparison tools.

Those who have signed a contract in the past three years were asked if they had visited an online comparison tool.

Figure 69: When you signed/compared your current electricity contract, did you visit an online comparison tool? Respondents who have signed a new contract in the past three years.



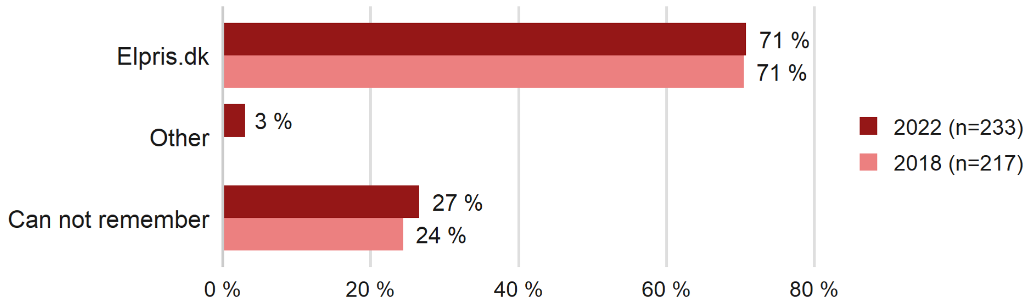
Almost four-in-ten Danish respondents who have signed a contract in the past three years visited an online comparison tool. Six-in-ten did not.

There are no significant differences between 2018 and 2022.

- A higher share of respondents under 35 years old visited an online comparison tool (51%), compared with older respondents (34–37%).
- The *aware* customers (55%) used online comparison tools to a greater extent than *active* (39%) and *inactive* (29%) customers.

Those who had visited an online comparison tool, were asked to name the tool they had used.

Figure 70: What comparison tool(s) did you visit? Multiple answers possible. Respondents who visited a comparison tool when they signed their current contract.

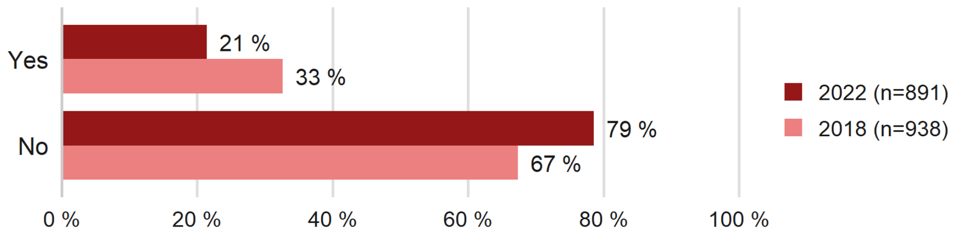


Seventy-one percent of those who had visited an online comparison tool used “Elpris.dk” (price comparison tool managed by the national energy regulatory authority). Three percent named other online comparison tools, and 27 percent respond that they cannot remember.

There are no significant changes from 2018 to 2022.

Those who have *not* signed a contract in the past three years were also asked about comparison tools.

Figure 71: Do you know of any online comparison tools for electricity contracts? Respondents who have not signed a new contract in the past three years.

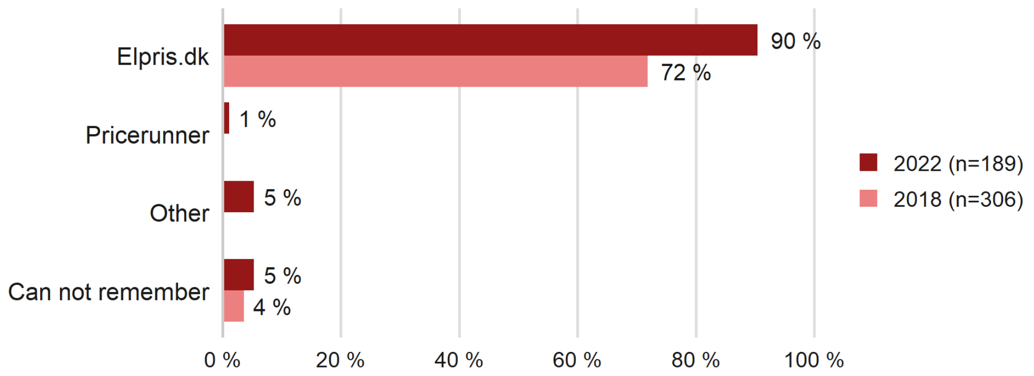


One-fifth of the respondents who have not signed a contract in the past three years know at least one online comparison tool. This is a significant decrease from 2018, when one-third knew of such tools.

- Knowledge of online comparison tools is higher among *aware* customers (50%) than among *inactive* customers (17%).

Those who know of online comparison tools for electricity contracts were asked which comparison tools they had visited online.

Figure 72: What comparison tool(s) have you visited online? Multiple answers possible. Respondents who have not signed a new contract in the past three years and say they know of an online comparison tool.



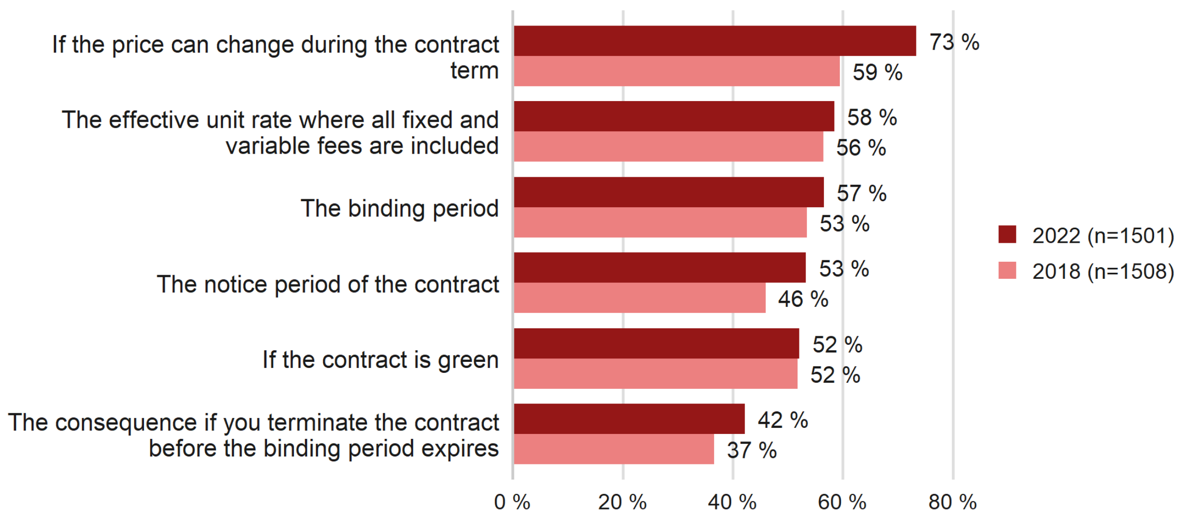
Nine-in-ten have visited “Elpris.dk”; a price comparison tool managed by the Danish regulatory authority. Five percent say that they do not remember which tools they have visited.

The share who have visited “Elpris.dk” is higher than in 2018 (72%).

Terms of contract

The respondents were asked questions about their current contracts and how well they know the terms of the contract.

Figure 73: When you think of your current electricity contract, are you aware of …? Shares who answered “Yes”.



Almost three-quarters say that they are aware of whether the price can change during the contract term. The majority also say that they are aware of the effective unit rate (where all fixed and variable fees are included) (58%) and the binding period (57%), while just over half say that they are aware of the notice period of the contract (53%) and whether the contract is green (52%). Approximately four-in-ten say that they are aware of the consequence of terminating the contract before the binding period expires (42%).

The share who say that they are aware of whether the price can change during the contract term has increased significantly, from 59 percent in 2018 to 73 percent in 2022. Also, the shares who are aware of the notice period of the contract, and the consequences of terminating the contract before the binding period expires, have increased from 2018 to 2022 (from 46% in 2018 to 53% in 2022, and from 37% in 2018 to 42% in 2022, respectively).

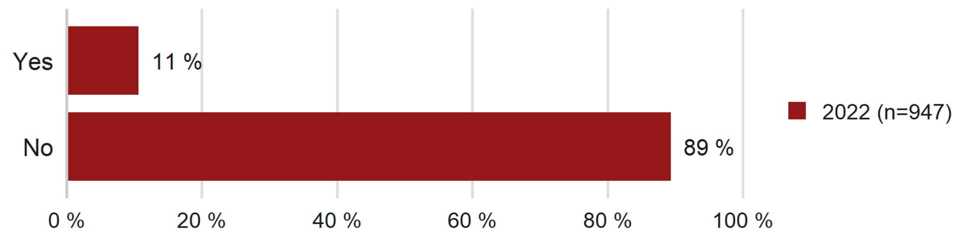
- Awareness of the binding period is lowest among those under 35 years old (49%), and it is highest among those aged 65 years old or older (63%).
- The shares who are aware of whether the price can change during the contract term are highest among customers who have variable-price or spot-price contracts (85–86%). It is lowest among those who have a fixed-price contract (66%). Further, a higher share of those who have a spot-price contract are aware of whether the contract is green (66%), compared to those who have a variable-price contract (56%) or a fixed-price contract (51%).
- *Inactive* customers are generally less aware about the terms of their current electricity contract, compared to *active* and *aware* customers.

Negative experiences and complaints

In 2022, the survey also included a section exploring customers' bad experiences in the electricity market.

Customers who had signed a contract were asked if they had experienced problems with their new supplier after signing their current contract and whether they made a complaint regarding their problem.

Figure 74: After you signed your current contract, did you experience problems with your new electricity supplier? Respondents who have ever signed a contract.

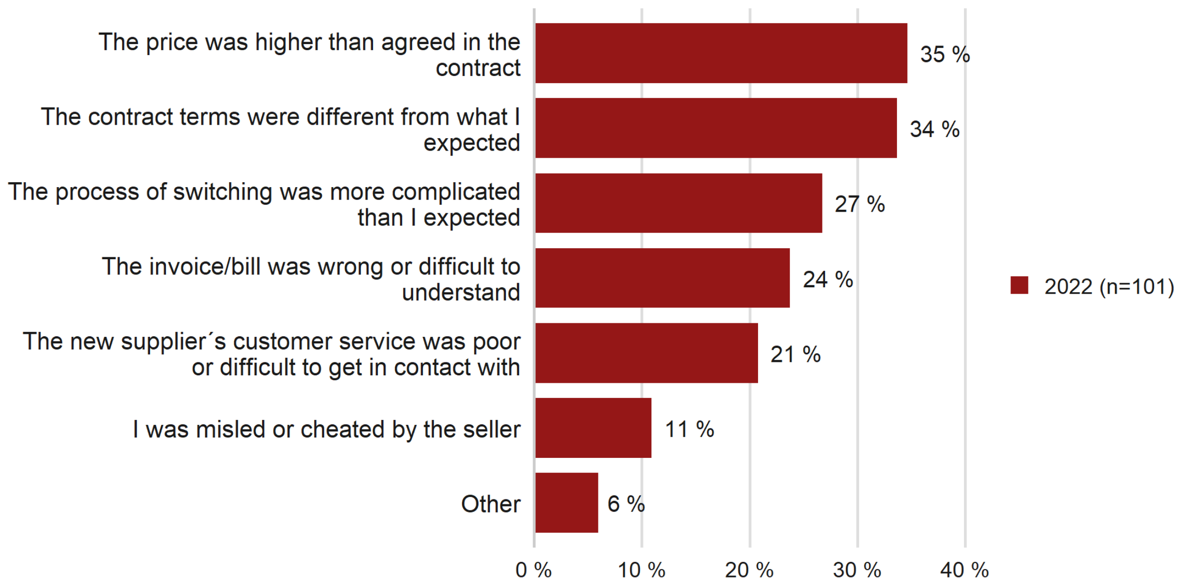


One-in-ten customers have experienced problems with their new electricity supplier.

- More than one-quarter of respondents under 35 years old (27%), and 16 percent of those ages 35-49, have experienced problems with their supplier. In comparison, only four percent of those who are 50 years old or older have experienced such problems.
- There is an association between annual kWh-usage and the shares who have experienced problems, ranging from six percent among those who use less than 5,000 kWh, to 28-35 percent among those who use 15,000 kWh or more.

Those who had experienced problems with their new electricity supplier were asked about what kind of problem they experienced.

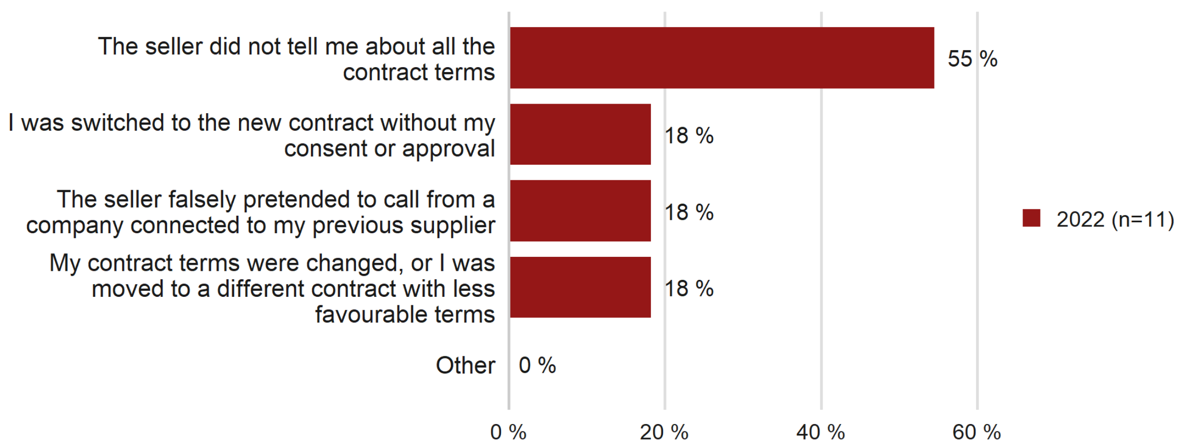
Figure 75: What kind of problem did you experience? Multiple answers possible. Respondents who experienced problems with their new electricity supplier.



About one-third of those who experienced problems with their new supplier respond that the price was higher than agreed in the contract (35%), or that the contract terms were different from what they expected (34%). Approximately one-quarter say that the process of switching was more complicated than they expected (27%), or that the invoice/bill was wrong or difficult to understand (24%). One-fifth say that the new supplier’s customer service was poor or difficult to get in contact with (21%). 11 percent claim that they were misled or cheated by the seller, and six percent cite other problems.

Those who responded that they were misled or cheated by the seller were asked how this happened.

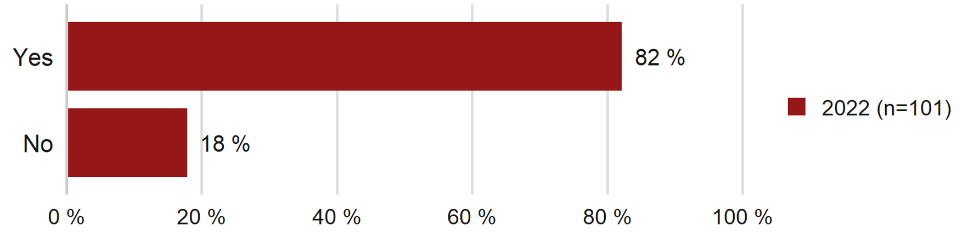
Figure 76: In what way were you misled or cheated by the seller? Multiple answers possible. Respondents who were misled or cheated by the seller.



The majority of those who claim to be misled or cheated by the seller respond that the seller did not tell them about all the contract terms. It is less common that they were switched to the new contract without their consent/approval, that the seller pretended to call from a company related to the previous supplier, or that there was a change in contract terms/the respondent was moved to a different contract with less favorable terms. **Note that only 11 respondents were asked this question**.

Those who had experienced problems with their new electricity supplier, were also asked whether they made a complaint.

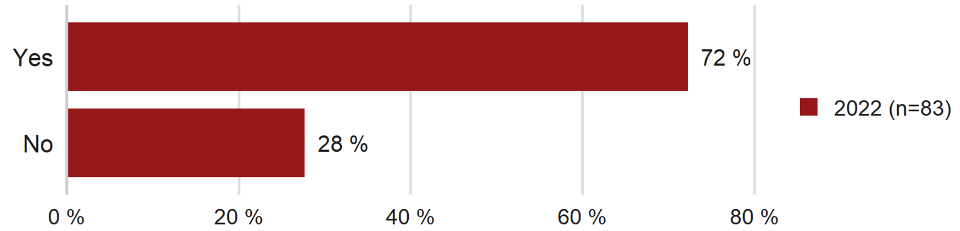
Figure 77: Did you make a complaint regarding your problem? Respondents who experienced problems with their new electricity supplier.



Eight-in-ten respondents who experienced problems with their new contract made a complaint regarding the problem (82%).

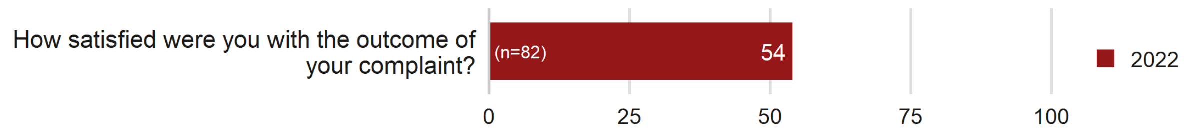
Those who made a complaint were asked if the problem got fixed due to the complaint, and how satisfied they were with the outcome.

Figure 78: Did your problem get fixed due to your complaint? Respondents who experienced problems with their new electricity supplier and have complained.



Seven-in-ten respond that the problem got fixed due to their complaint (72%).

Figure 79: How satisfied were you with the outcome of your complaint? Average scores: 0=Very dissatisfied and 100=Very satisfied. "Do not know" is excluded. Respondents who experienced problems with their new electricity supplier and have complained.



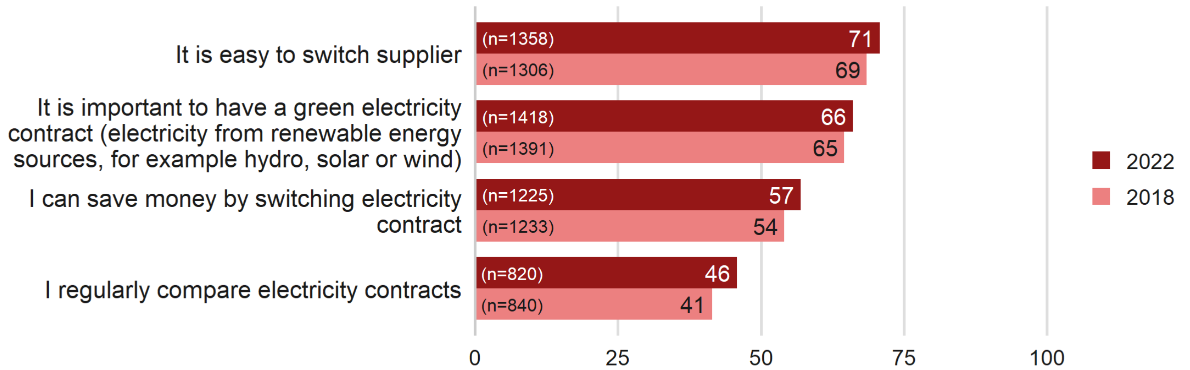
When it comes to satisfaction with the outcome of the complaint, the results show no clear direction (score of 54 on a scale of 0 to 100). 25 percent say that they were dissatisfied, while 42 percent say that they were satisfied.

- On average, those under 35 years old were more satisfied with the outcome (67), compared with older respondents (29-51).

The Danish customers' attitudes towards the electricity market

The respondents were asked to consider different statements concerning the electricity market.

Figure 80: To what extent do you agree with the following statements …? Average score: 0=Fully disagree and 100=Fully agree. "Do not know" is excluded. Respondents who had not compared their current contract were not asked whether they regularly compare electricity contracts.



The Danish respondents agree to a fairly high extent that it is easy to switch supplier (71), and they agree to a moderate extent that it is important to have a green energy contract (66). They also tend to agree that they can save money by switching electricity contract (57) but disagree to some extent that they regularly compare contracts (46).

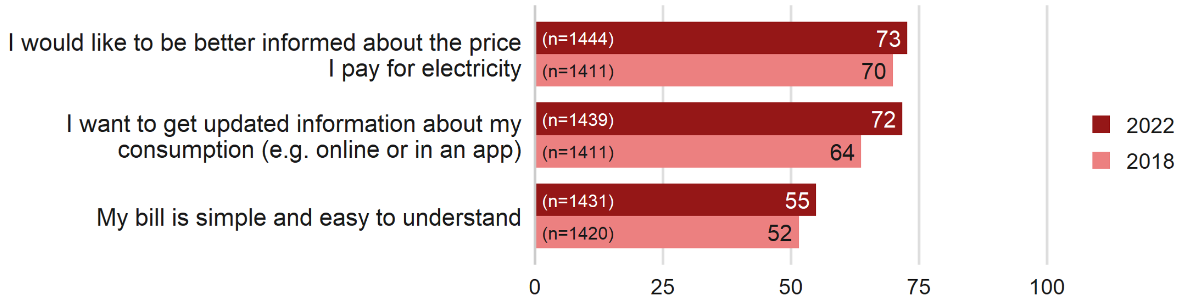
Compared with 2018, the respondents disagree less that they regularly compare electricity contracts (average score up from 41 in 2018 to 46 in 2022).

- There is an association between age and the tendency to agree that it is easy to switch supplier (from 62 among those under 35 years old to 77 among those aged 65 years old or older). On the other hand, there is an inverse relationship between age and the tendency to believe that one can save money by switching electricity contracts (from 62 among those under 35 to 53 among those aged 65 or older). Further, the youngest agree the most that they compare contracts regularly (54, compared with 44-45 among those aged 35 years or older).
- While *active* customers overwhelmingly agree that it is easy to switch suppliers (85), the scores are significantly lower among *aware* and *inactive* customers (66-70). Further, *active* customers believe to a fairly high extent that one can save money by switching contract (70), while *aware* and *inactive* customers show no clear direction with regard to this statement (52-53). *Inactive* customers on average do not at all agree that they regularly compare contracts (39), while *active* (50) and *aware* (50) customers tend to neither agree nor disagree. Also, *inactive* customers are generally more unsure than others.
- Those who use 15,000 kWh or more per year agree more strongly that they can save money by switching contract (63-68), compared to those with a lower annual kWh usage (55-59).

Billing and information

The respondents were asked to consider different statements concerning billing and information.

Figure 81: To what extent do you agree with the following statements …? Average score: 0=Fully disagree and 100=Fully agree. "Do not know" is excluded.



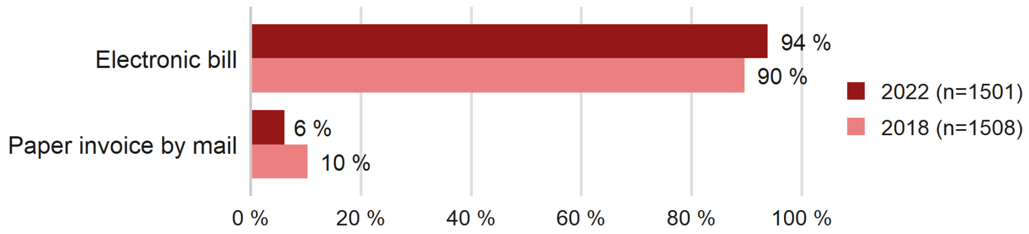
The Danish respondents agree to a fair extent that they would like to get better informed about the price they pay for electricity (73) and that they would like to get updated information about their consumption (72). Further, they somewhat agree that their bill is simple and easy to understand (55–39% agree, 32% are neutral, and 25% disagree).

The respondents agree to a significantly higher degree that they want to get updated information about their consumption, compared with 2018 (from 64 in 2018 to 72 in 2022). Also, compared with 2018, they agree somewhat more strongly that they would like to be better informed about the price (from 70 in 2018 to 73 in 2022) and tend to agree more that their bill is simple and easy to understand (from 52 in 2018 to 55 in 2022).

- Respondents under 35 tend to agree that their bill is simple and easy to understand (60), while there is no clear direction among older respondents (54).
- *Active* customers agree more broadly that they would like to get updated information about their consumption (79), compared to *aware* and *inactive* customers (69-72). Further, *active* and *aware* customers tend to agree that their bill is simple and easy to understand (59-60), while there is no clear direction among *inactive* customers (52). *Inactive* customers tend to be more unsure than others with regard to the statements.
- Those who have a spot-price contract agree more broadly that they would like to get updated information about their consumption (78), compared to those who have fixed-price contracts (71) or variable-price contracts (73).

The respondents were also given different questions about the electricity bill; about how they receive it; and what information they read on the bill.

Figure 82: How do you receive your electricity bill?

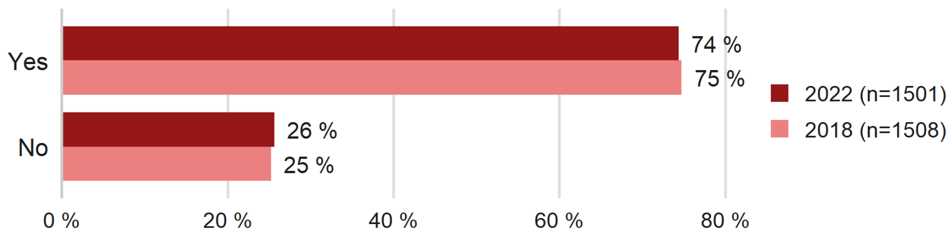


Almost all Danish respondents receive their electricity bill electronically (94%). Six percent receive a paper invoice by mail.

The share who receives their bill electronically has increased from 90 percent in 2018 to 94 percent in 2022.

- There is an association between age and the share who receive their bill electronically, ranging from 87 percent among respondents under 35 to 97 percent among those who are 65 or older.
- The share who receive the bill electronically is higher among those who live in houses (96%) than among those who live in apartments (91%).
- 98 percent of *active* customers receive their bill electronically. In comparison, this applies to 92 percent of *aware* customers and 93 percent of *inactive* customers.
- Customers with a spot-price contract more often receive their bill electronically (98%), compared with those who have other types of contracts (92–94%).

Figure 83: Do you read the information presented on your electricity bill?



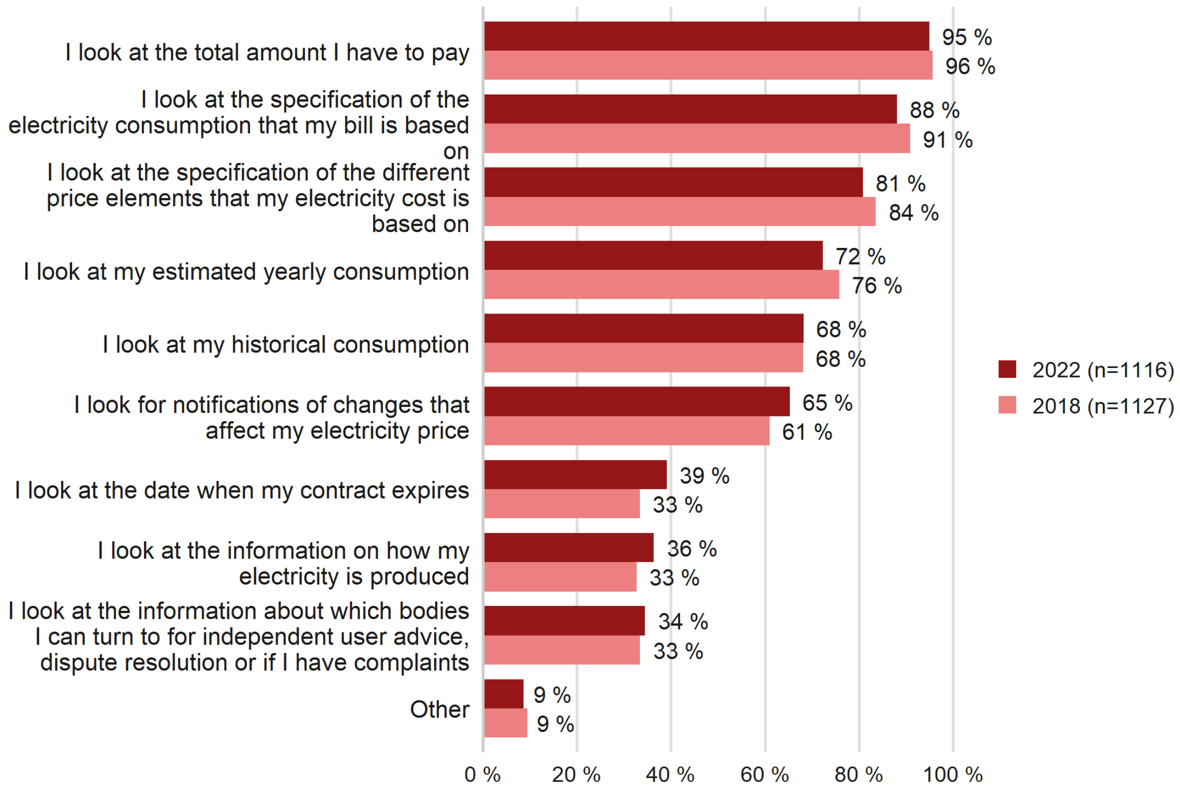
Three-quarters of the Danish customers read the information presented on their electricity bill.

There are no significant changes, compared with 2018.

- The share who read the information presented on the bill is somewhat higher among respondents who are 50 or older (77–78%) than among those younger than 50 (69–73%).
- A lower share of *inactive* respondents read the information (68%), compared with *active* (86%) and *aware* (88%) customers.
- The share who read the information is highest among those who have spot-price contracts (91%), and lowest among those who have fixed-price contracts (72%) (80% of those who have variable-price contracts read the information).

The electricity customers who stated that they read the information presented on the electricity bill were asked what information they read here.

Figure 84: What information do you read on your electricity bill? Respondents who say they read their bill. Shares who answer, "Yes".



Almost all the Danish respondents who read their electricity bill look at the total amount they must pay (95%), and almost nine-in-ten looks at the specification of the electricity consumption that their bill is based on (88%). The vast majority also look at the specification of the different price elements that their electricity cost is based on (81%) and their estimated yearly consumption (72%). Most of them also look at their historical consumption (68%) and look for notifications of changes that affect their electricity price (65%).

It is less common to look at the contract expiration date (39%), information on how the electricity is produced (36%), and information about which bodies one can turn to for independent advice, dispute resolution or in the case of complaints (34%).

Nine percent looks at other information on their bill.

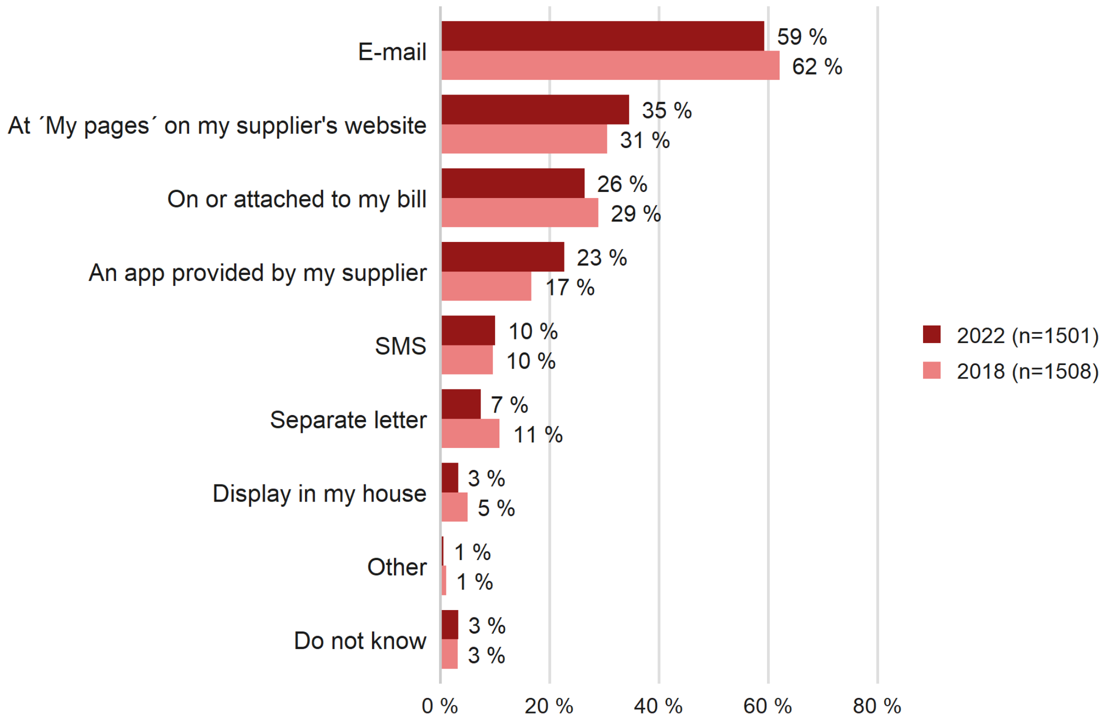
A higher share than in 2018 look at the information about the expiration date (39% in 2022 and 33% in 2018).

- Respondents under 35 generally read less information on their bills. There is an association between age and the share who read information about specification of different price elements (from 71% of those under 35 to 86% of those aged 65 or older), specification of consumption (from 74% to 96%), estimated yearly consumption (from 57% to 85%), historical consumption (from 52% to 76%), and the total amount one must pay (from 87% to 98–99%). On the other hand, the youngest customers more often read information about the expiration date (48%), compared to older customers (36–39%).
- Compared to *aware* and *inactive* customers, a higher share of *active* customers read information about the expiration date of the contract (50% compared with 43% and 34%), notifications of changes that affect the price (73% compared with 62–67%), specification of

consumption (95% compared with 85–89%), and the total amount one must pay (98% compared with 94%). Further, larger shares of *active* and *aware* customers read the specification of different price elements (88–89%), compared to *inactive* customers (76%).
- Customers who have a fixed-price contract more often look at the expiration date (47%), compared to those who have other types of contracts (30–37%). Also, a somewhat higher share of customers with a spot-price contract read the specification of price elements (90%), compared to others (80–81%).
- A lower share of those who receive a paper invoice read the specification of their consumption (75%), and the total amount they must pay (83%), compared to those who receive their bill electronically (89% and 96%, respectively).
- A slightly higher share of those who live in houses read information about specification of their consumption (91%), compared with those who live in apartments (84%).

All respondents were asked how they prefer to get information from their electricity supplier.

Figure 85: How do you prefer to get information from your electricity supplier? Multiple answers possible.



Six-in-ten prefer to get information from their electricity supplier via e-mail. 35 percent prefer to read information at "My pages" on their supplier's website, 26 percent prefer to read it on or attached to their bill, and 23 percent prefer to read it on an app provided by their supplier.

Lower shares of the customers prefer to receive information via SMS (10%), separate letters (7%), and via a display in their house (3%).

One percent name other information channels, and three percent are unsure.

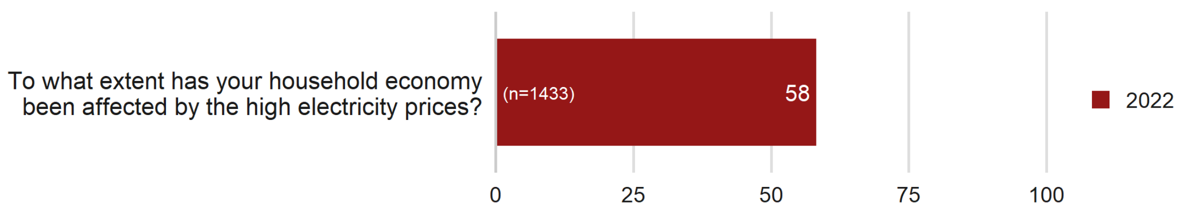
The share who prefer to get information via an app provided by their supplier (23%) is higher than in 2018 (17%). Moreover, fewer than in 2018 prefer to get information in a separate letter (11% in 2018 and 7% in 2022).

- Younger respondents are generally more interested in getting information via an app or via SMS than older respondents. Also, a smaller majority of the younger respondents prefer e-mail, compared with older respondents.
    - The share who prefer information via e-mail ranges from 50 percent of those under 35 to 69 percent of those who are 65 or older.
    - The share who prefer to get information via SMS ranges from 19 percent among the youngest to 6 percent among the oldest.
    - While between 27 and 30 percent of respondents younger than 50 prefer to get information via an app, this only applies to 13–21 percent of those who are 50 or older.
- Compared to *active* and *aware* customers, a somewhat lower share of *inactive* customers prefer to get information at "My pages" on their supplier's website (31% of *inactive* customers and 39–43% of others) and via an app provided by their supplier (20% of *inactive* customers and 27–28% of others). Further, very few *active* customers prefer to get information via a separate letter (3%), compared with *aware* and *inactive* customers (8–9%).
- Higher shares of customers with a spot-price contract prefer to get information at "My pages" on their supplier's website (47%) and in an app provided by their supplier (36%), compared with those who have fixed- or variable-price contracts (34–35% and 21–23%, respectively).
- A higher share of respondents who live in houses prefer to get information via e-mail (63%), compared with those who live in apartments (54%).

The price shock

In 2022, two questions were added to the questionnaire to address the issue of extraordinarily high electricity prices. The respondents were asked to evaluate the impact of increased electricity prices on their household economy – and to reflect on whether the high prices would influence their future choice of electricity contract.

Figure 86: To what extent has your household economy been affected by the high electricity prices? Average scores 0=Not at all and 100=Very high extent. "Do not know" is excluded.

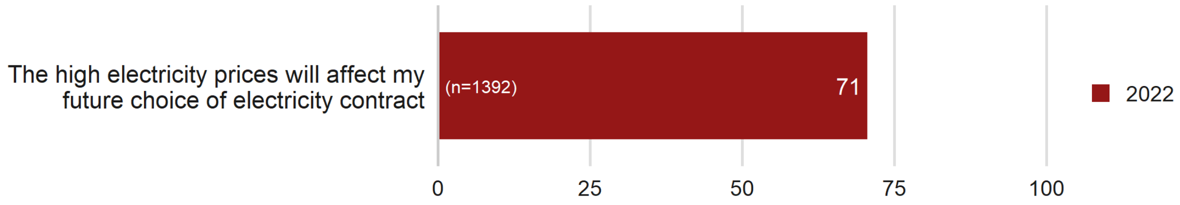


The Danish respondents have to some extent experienced that the high electricity prices have affected their household economy (58). 46 percent respond that their household economy has been affected to a high extent, while 23 percent respond that their household economy is not at all affected or affected to a low extent.

- There is an inverse relationship between age and the extent to which the high energy prices have affected the household economy, ranging from 64 (*to some extent*) among those under 35 to 52 (*no clear direction*) among those who are 65 or older.
- The high prices have to a lesser degree affected the household economy of respondents who have fixed price (55), compared to those who have variable- or spot-price contracts (62-64).

- Those who have a low annual kWh usage are affected by the energy prices to a lesser degree than those with a higher annual kWh usage (ranging from 54 among those who use less than 5,000 kWh to 70 among those who use more than 20,000 kWh).

Figure 87: To what extent do you agree that the high electricity prices will affect your future choice of electricity contract? Average scores 0=Fully disagree and 100=Fully agree. "Do not know" is excluded.



The Danish customers agree to a fairly high extent that the electricity prices will affect their future choice of electricity contract (71). More than half agree to some extent (56%), while 7 percent say that they disagree to some extent.

- *Active* customers tend to agree more with this statement (79, *high extent*) than *aware* (72, *fairly high extent*) and *inactive* customers (68, *moderate extent*).
- There is an association between the extent to which the respondents have been affected by the high prices and how strongly they agree that the high prices will affect their future choice of electricity contract. The average score ranges from 59 among those who respond that their household economy has been affected to a low extent or not at all to 78 among those who say that their household economy has been affected to a high or very high extent.

The Finnish customers

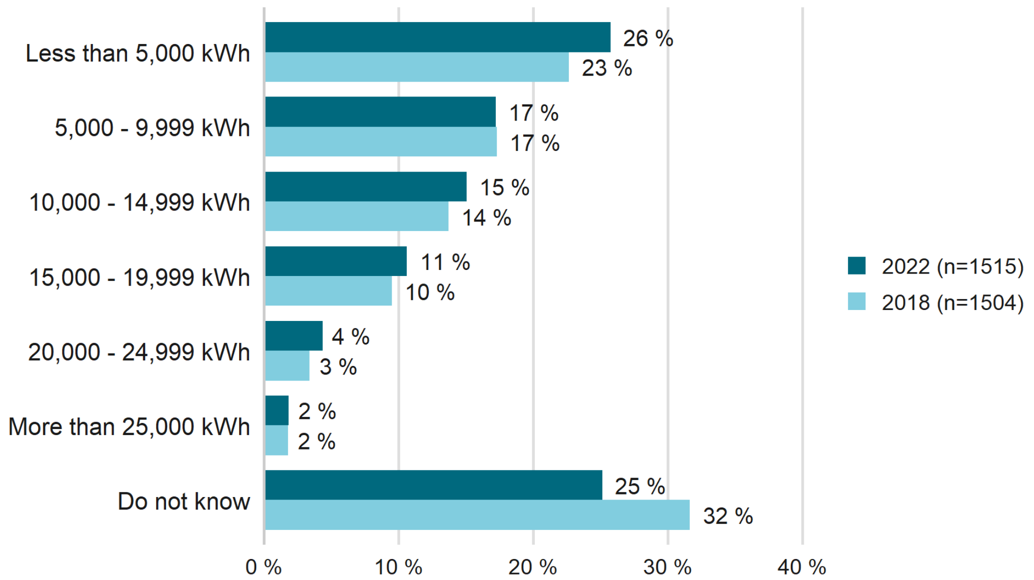
This chapter takes a closer look at the *Finnish* electricity customers and their presence and participation in the electricity market, as well as their attitudes towards the Finnish electricity market. Interesting and significant differences between subgroups will be remarked upon, and the results in 2022 will be compared with the 2018 results.

Note that some results are presented as *average scores* rather than as percentages. This is done when respondents were asked to respond on a five-point scale – for example, from *1 = Fully disagree* to *5 = Fully agree*. The response values have been recoded so that "fully disagree" is set to 0 and "fully agree" is set to 100, with the other categories coded at equal intervals in between. The average of the recoded responses is then presented as a question's "average score" on a scale from 0 to 100. An overview of how these scores are interpreted is available in the methods section of the report.

The Finnish customers' presence in the electricity market

The respondents were asked different questions about their presence in the Finnish electricity market.

Figure 88: Approximately how many kilowatt-hours do you use each year?



Most of the Finnish respondents use less than 15,000 kWh per year: 26 percent use less than 5,000 kWh, 17 percent use 5,000–9,999 kWh per year, and 15 percent use 10,000–14,999 kWh per year. 11 percent use 15,000–19,999 kWh per year, and six percent use 20,000 kWh or more per year.

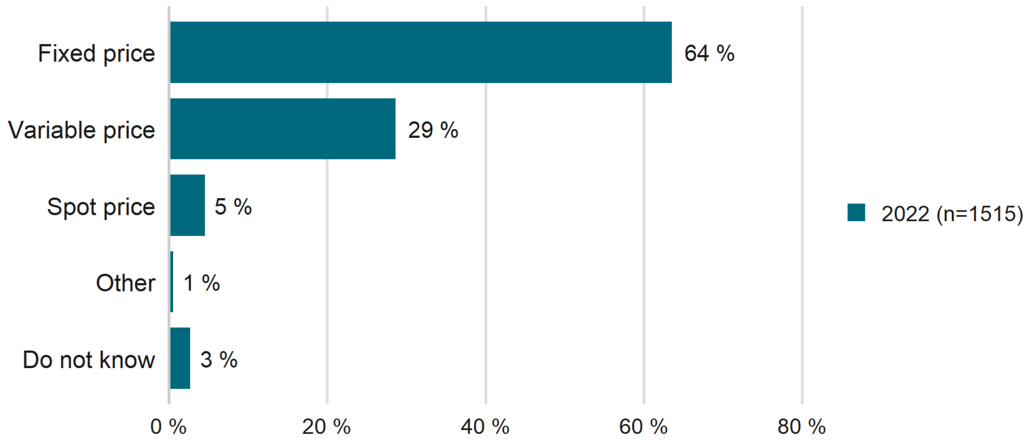
- On average, respondents aged 65 or older report a somewhat lower annual kWh use, compared with younger respondents.
- Respondents who live in houses generally use more electricity than those who live in apartments.

One-quarter report that they *do not know* how many kWh they use per year. This share has decreased – from 32 percent in 2018 to 25 percent in 2022.

- *Inactive* customers are more unsure about their annual kWh use (34%), compared to *active* (20%) and *aware* customers (15%).
- Further, respondents who live in apartments are more unsure about their annual consumption than those who live in houses (29% and 16%, respectively).

In 2022, a question about current contract type was added to the questionnaire. [18]

Figure 89: What kind of electricity contract do you have today?



The respondents were asked what kind of electricity contract they currently have. More than six-in-ten Finnish customers say they have a fixed-price contract (64%). 29 percent have a variable-price contract, five percent have a spot-price contract, and one percent have some other type of contract. Three percent *do not know* what kind of electricity contract they have.[19]

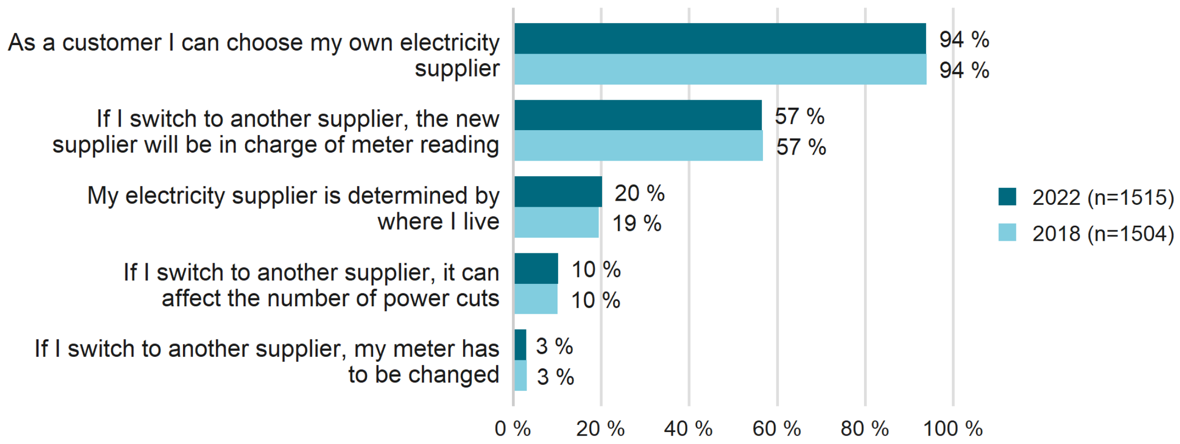
- Fixed-price contracts are less common among respondents under 35 (56%), and more common among those who are 65 or older (71%), compared with the age groups in the middle (62–64%).
- A higher share of *active* customers have a fixed-price contract (79%), compared with *aware* (63%) and *inactive* customers (51%). Variable-price contracts are more common among *inactive* customers (41%) than they are among *active* (15%) and *aware* customers (27%).
- A somewhat higher share of respondents living in houses have a fixed-price contract (69%), compared with those who live in apartments (61%).

[18] The section "Contract types" (p.22) provides more information about this question.
[19] Note that as this is self-reported information it may diverge considerably from information about contract types gathered by other means.

The Finnish customers' knowledge of the electricity market

The electricity customers were asked to consider different statements concerning electricity suppliers and the process of switching suppliers.

Figure 90: Do you believe the following statements are correct or not? Shares who believe the statements are correct.



The vast majority of the Finnish respondents believe that they can choose their own electricity supplier (94%). Further, more than half believe that if they switch to another supplier, the new supplier will be in charge of meter reading (57%).

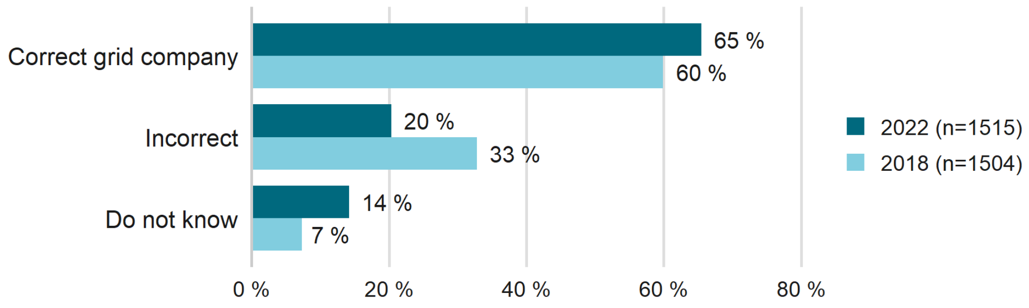
Twenty percent believe that their electricity supplier is determined by where they live, and 10 percent believe that if they switch suppliers, this can affect the number of power cuts. However, a clear majority believes that these statements are *incorrect* (74% in both cases). Very few believe that if they switch suppliers, their meter has to be changed (3%); the vast majority believes that this statement is incorrect (88%).

There are no significant changes from 2018 to 2022.

- Respondents under 35 are generally more unsure as to whether the statements are correct, and they generally have less knowledge of the electricity market, compared with older respondents.
  - The share who say that if they switch supplier, the new supplier will be in charge of meter reading increases with age, from 47 percent of those under 35 to 65 percent of those 65 or older).
  - Moreover, somewhat fewer of the youngest respondents (under 35) say that it is correct that they can choose their own supplier (87%), compared with older respondents (94–97%).
  - There is an association between age and the shares who say that it is *incorrect* that their supplier is determined by where they live (from 57% among those under 35 to 80% among those aged 65 or older), that their meter has to be changed if they switch supplier (from 77% to 92%), and that changing supplier might affect the number of power cuts (from 63% to 80%).
- *Inactive* customers tend to be more uncertain of whether or not the statements are correct, compared with *active* and *aware* customers.

The respondents were asked to name the company that operates the power lines to their home (their grid company), their own electricity supplier, and two other electricity suppliers.

Figure 91: Name the company that operates the power lines to your home[20]

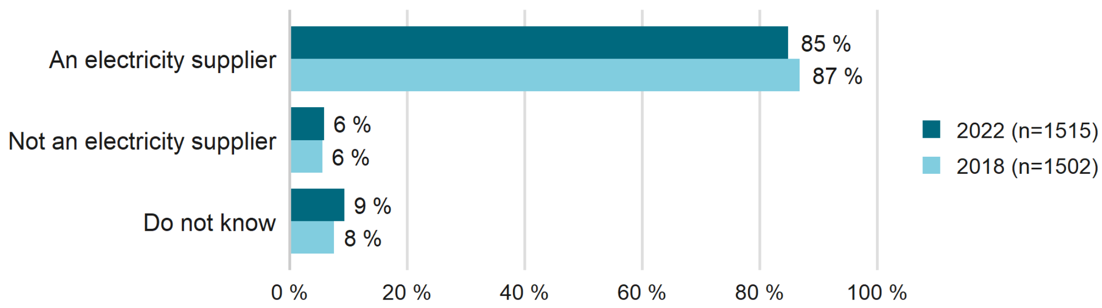


Sixty-five percent of the Finnish respondents name their actual grid company. 20 percent either give the wrong name for their grid company, name another grid company, or name company that does not exist. 14 percent say that they *do not know* the name of their grid company.

In 2018, 60 percent of the Finnish customers knew the name of their grid company. In 2022, fewer respondents give an *incorrect* name (20%; down from 33%), while there are more who say that they do not know the name (7% in 2018 and 14% in 2022).

- Somewhat higher shares of respondents aged 50 or older know the name of their grid company (67–71%), compared to those who are under 50 (59–64%). More of the respondents under 35 are unsure (26%), compared with older respondents (9–16%).
- A somewhat lower share of *inactive* customers (61%) know the name of their grid company, compared with *active* (69%) and *aware* customers (68%).
- Higher shares of respondents with fixed- (69%) or spot-price contracts (68%) know the name of their grid company, compared to respondents with a variable-price contract (60%).

Figure 92: Who is the electricity supplier in your home?



When asked to name their current electricity supplier, 85 percent of the Finnish customers provide the name of an actual electricity supplier.[21] Six percent answer something that is not an electricity supplier, and nine percent say that they *do not know* who their electricity supplier is.

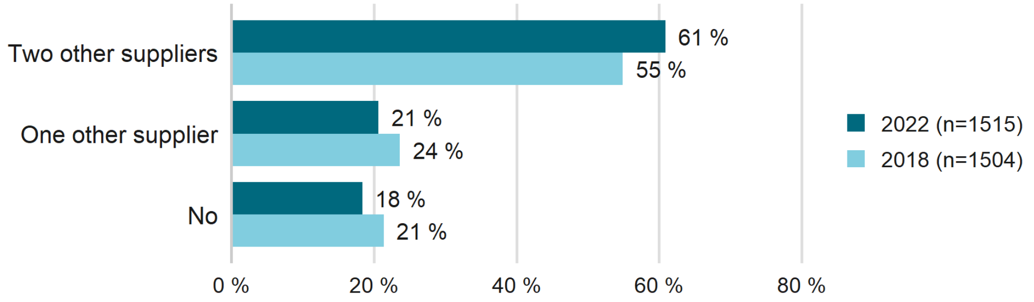
There are no significant differences between 2018 and 2022.

- The share of respondents who can name their electricity supplier increases with age, ranging from 73 percent of respondents under 35 to 90 percent of those who are 65 or older.

[20] This variable is based on the respondents' postal codes. It should be considered that the postal codes may be incorrect (e.g., if respondents have moved, etc.).
[21] We cannot know whether this is *their* actual electricity supplier or some *other* supplier.

- A somewhat higher share of *active* customers know the name of their supplier (88%), compared to *aware* (84%) and *inactive* customers (82%).

Figure 93: Can you name two other electricity suppliers?

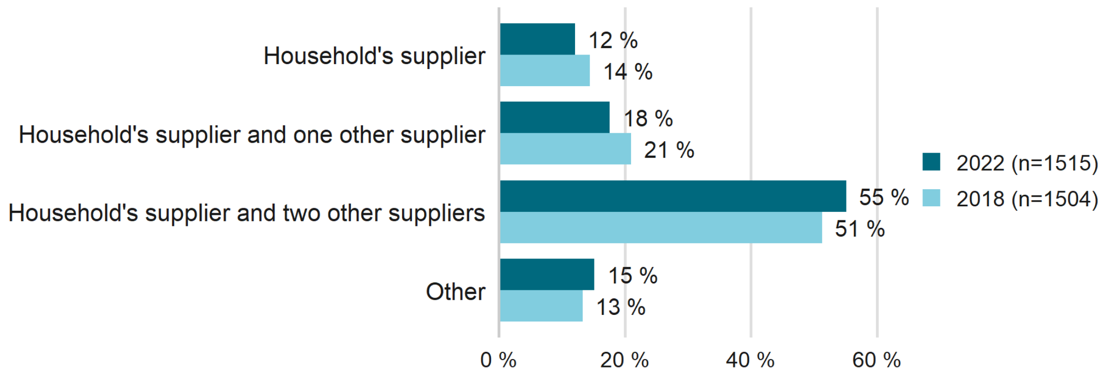


Six-in-ten Finnish customers know the names of two *other* electricity suppliers. 21 percent name one other supplier, while 18 percent cannot name any other suppliers.

Compared with 2018, somewhat more respondents could name two other electricity suppliers in 2022 (55% and 61%, respectively).

- A higher share of *inactive* customers cannot name any other suppliers (25%), compared with *active* (13%) and *aware* customers (14%).
- Fewer of those who receive their bill as a paper invoice by mail can name two other suppliers (24%), compared with those who receive their bill electronically (16%).

Figure 94: Total knowledge of electricity suppliers.



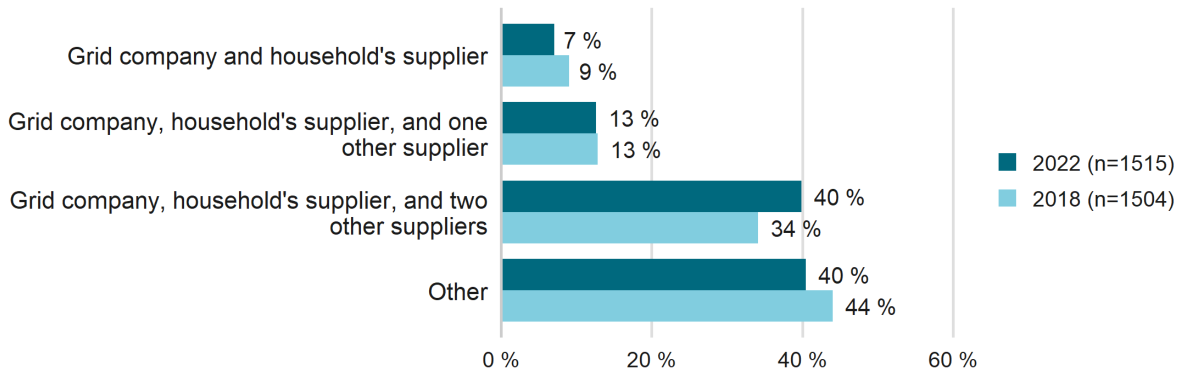
Twelve percent of the Finnish respondents know only their household's supplier. 18 percent also know the name of one other supplier, while 55 percent know both their household's supplier and two other suppliers. 15 percent answer something other than an actual electricity supplier (a grid company or something else), or that they do not know.

There are only small differences between 2018 and 2022.

- Younger respondents generally have less knowledge of electricity suppliers than older respondents do. There is an inverse relationship between age and not being able to name *one* electricity supplier; ranging from 27 percent of respondents under 35 to 10 percent of those who are 65 or older.

- *Inactive* customers generally have less knowledge of electricity suppliers than *active* and *aware* customers do. While 18 percent of *inactive* customers could not name any electricity suppliers, this applies to 12 percent of *active* customers and 16 percent of *aware* customers. Moreover, while *inactive* customers tend to know only the name of their own supplier, higher shares of *active* and *aware* customers also know the name(s) of other suppliers.

Figure 95: Total knowledge of the electricity market



Seven percent of the Finnish respondents correctly name their grid company and one actual electricity supplier. 13 percent know their grid company, their household's supplier, and *one other* electricity supplier, while 40 percent know their grid company, their household's supplier, and *two other* electricity suppliers.

Forty percent of the Finnish respondents cannot correctly name their grid company and at least one electricity supplier.

Compared to 2018, more Finnish customers now know their grid company, their electricity supplier, and two other electricity suppliers (40%; up from 34%). Slightly fewer cannot name their grid company and at least one actual electricity supplier (40% in 2022, compared to 44% in 2018).

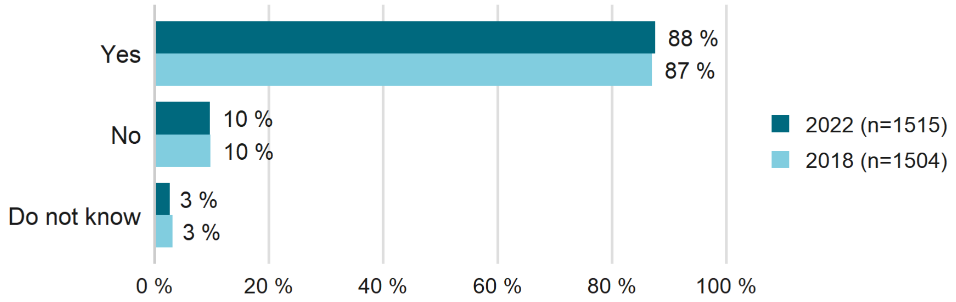
- A higher share of respondents under 35 have poor knowledge of the electricity market (cannot name their grid company and at least one electricity supplier), compared to older respondents (49% of respondents under 35 and 35–42% of others).
- A higher share of *inactive* customers have poor knowledge of the electricity market (46%), compared to *active* (35%) and *aware* customers (39%).
- A higher share of respondents who have a variable-price contract have poor knowledge of the electricity market (47%), compared to respondents who have fixed- (36%) or spot-price contracts (41%).

The Finnish customers' participation in the electricity market

The respondents were also asked different questions related to their participation in the electricity market, including the process of switching and comparing electricity contracts, the use of comparison tools, and knowledge of contractual terms.

Signing and comparing contracts

Figure 96: Have you ever signed a contract with an electricity supplier?



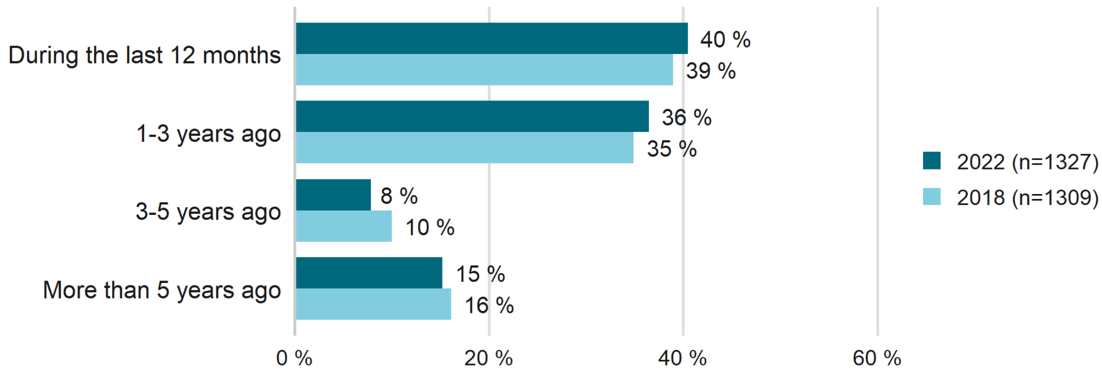
Almost nine-in-ten Finnish customers have signed a contract with an electricity supplier (88%). 10 percent have never signed an electricity contract, and three percent are unsure.

There are no significant differences between 2018 and 2022.

- There is an association between age and having signed an electricity contract, ranging from 80 percent of respondents under 35 to 93 percent of those who are 65 or older.

Respondents who had signed a contract with an electricity supplier were asked when they last did this.

Figure 97: When did you last sign a new contract with an electricity supplier? Percent of respondents who have ever signed a contract.



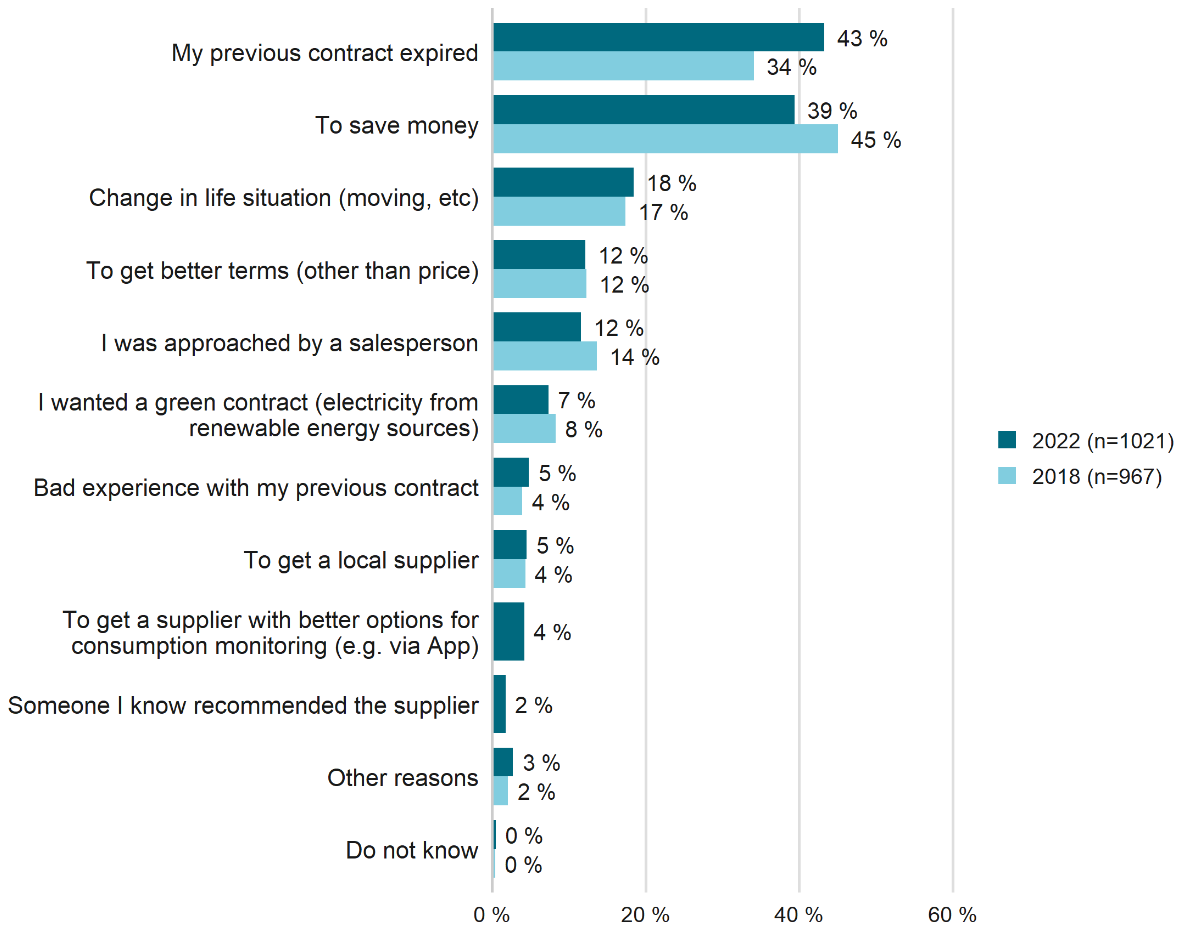
Four-in-ten customers who have signed a contract did so less than one year ago and are considered *active* customers. 36 percent signed a contract 1–3 years ago, eight percent signed a contract 3–5 years ago, and 15 percent signed a contract more than five years ago.

There are no significant differences between 2018 and 2022.

- It is more common to have signed a contract within the last five years among those under 35 than among older respondents.
- Half of those who have a fixed-price contract signed the contract less than one year ago (50%). In comparison, this applies to 22 percent of those who have a variable-price contract (and 33% of those who have a spot-price contract).
- A higher share of those who use less than 5,000 kWh annually signed their contract less than one year ago (48%), compared with those who use more electricity (34–42%).
- Twenty percent of those who receive their bill on paper by mail signed a contract more than five years ago. This applies to 12 percent of those who receive their bill electronically.

The electricity customers who have signed new contracts in the past three years were asked *why* they signed a new contract.

Figure 98: Why did you sign a new electricity contract? Multiple answers possible. Respondents who signed a contract in the past three years.



The most common reasons for signing a new contract are because the old contract expired (43%) and to save money (39%).

Eighteen percent signed the new contract due to a change in their life situation, and 12 percent wanted to get better terms (other than price) and/or were approached by a salesperson. It is less common that the respondents wanted a green contract (7%), signed a new contract due to a bad experience with their previous contract (5%), wanted to get a local supplier (5%), wanted better options for consumption monitoring (4%), or signed because someone they know recommended the supplier (2%).

Three percent cite other reasons, and fewer than one percent are unsure.

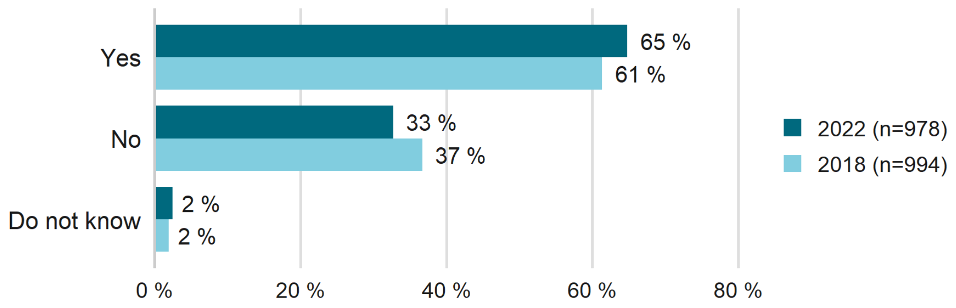
Compared with 2018, more respondents say that they signed a new contract because their previous contract expired (34% in 2018 and 43% in 2022).

- It is more common to have signed the new contract due to a change in life situation among younger respondents (ranging from 32% among those under 35 to 9% among those who are 65 or older). More of the youngest respondents also signed the contract to get better options for consumption monitoring (9% of respondents under 35 and 3% of older respondents). On the other hand, it is more common among the older respondents to have signed a new contract because their previous contract expired (ranging from 31% of respondents under 35 to 55% of those 65 or older).

- It is more common among *active* customers to have signed the new contract because the previous contract expired (51%), compared with *aware* (34%) and *inactive* customers (35%). More *aware* customers signed the new contract to save money (50%), compared to *active* and *inactive* customers (37%). Finally, a somewhat higher share of *inactive* customers signed a new contract due to a change in their life situation (25%), compared with *active* (15%) and *aware* customers (18%).
- More of the respondents with fixed-price contracts signed the new contract because their previous contract expired (51%), and to save money (43%), compared to respondents who have variable- or spot-price contracts (variable price: 20%, because the previous contract expired; 30%, to save money. Both shares are 28% among those with spot price). More of the respondents with variable-price contracts signed due to a change in their life situation (32%), compared to those who have fixed- (14%) or spot-price contracts (24%).
- Higher shares of respondents who live in houses than of those who live in apartments signed the new contract to save money (47% and 36%, respectively), and because their previous contract expired (53% and 39%, respectively). Fewer respondents in houses signed a new contract because of a change in their life situation (9%), compared with those who live in apartments (22%).

Respondents who are *not* considered to be active (i.e., who have not signed a contract in the past year) were asked if they have *compared* their current contract to other contracts.

Figure 99: Have you ever compared your current electricity contract to other contracts? Percent of respondents who have not signed a contract in the past 12 months (aware and inactive customers).



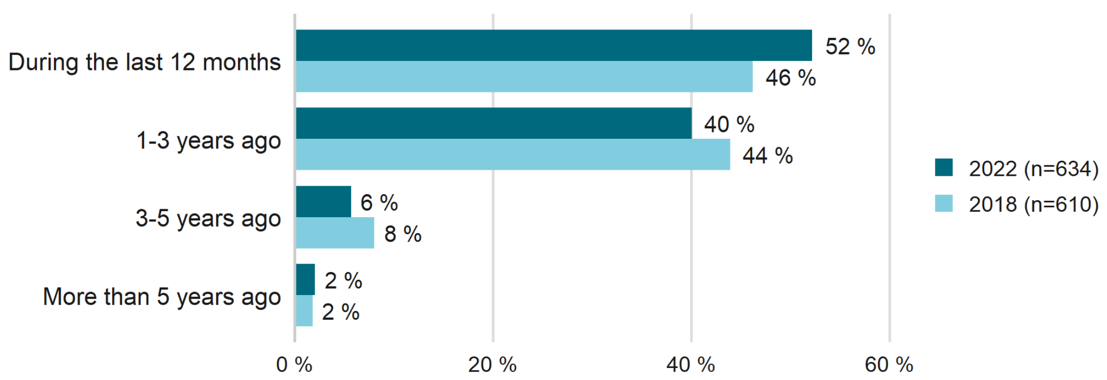
Almost two-thirds of the Finnish customers who are not considered to be *active* (the *aware* and *inactive* customers) have compared their current electricity contract to other contracts. One-third have never made such a comparison.

There are no significant differences between 2018 and 2022.

- A higher share of those who live in houses have compared their current contract to other contracts (78%), compared to those who live in apartments (59%).
- There is an association between annual kWh use and the share who have compared their contract to other contracts: 63 percent of those who use less than 5,000 kWh per year, 70 percent of those who use 5,000-9,999 kWh per year, and 79-80 percent of those who use 10,000 kWh or more have compared contracts.
- A higher share of those who have a fixed-price contract have compared their contract to other contracts (73%), compared with those who have a variable-price contract (54%).
- A lower share of those who receive their bill as a paper invoice have compared their contract to other contracts (54%), compared to those who receive their bill electronically (69%).

Electricity customers who have compared contracts were asked when they last compared their current contract to other contracts.

Figure 100: When did you last compare your current electricity contract to other contracts? Percent of respondents who have ever compared contracts.



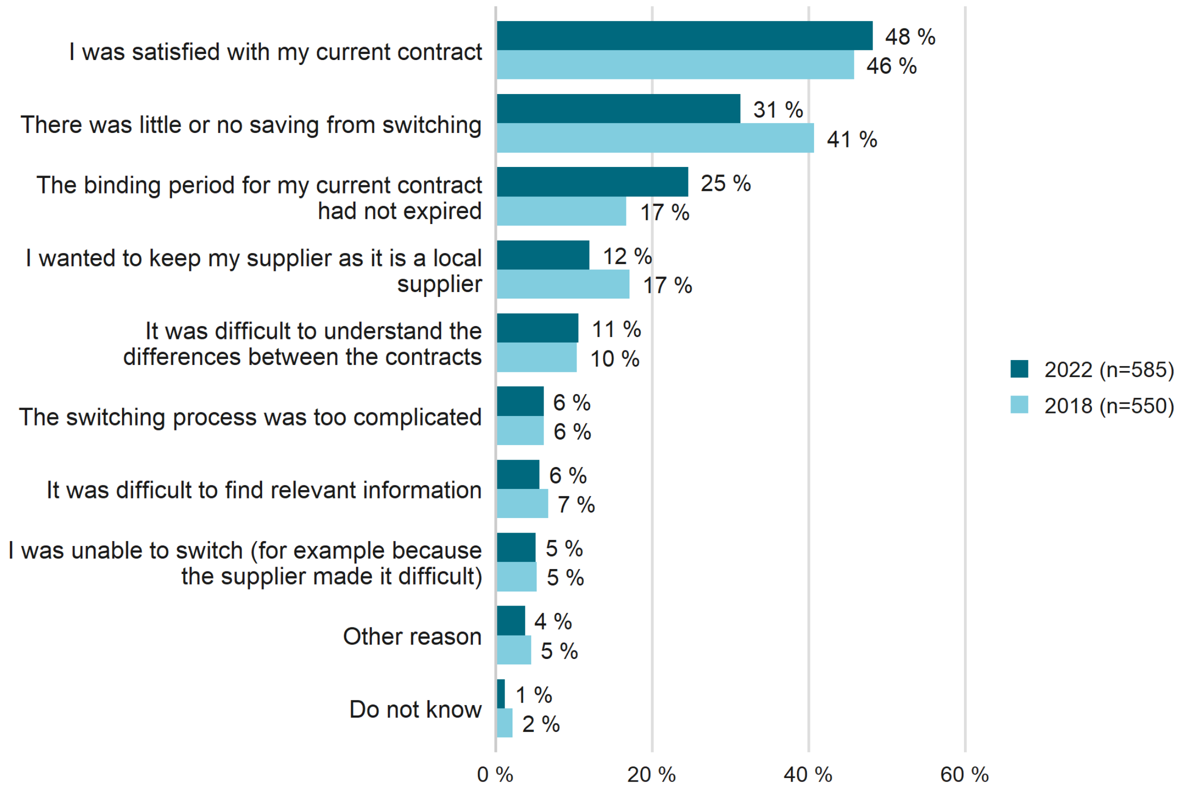
Approximately half of the respondents who have compared their current contract to other contracts did so during the last 12 months (52%). Four-in-ten compared their contract 1–3 years ago, six percent did so 3–5 years ago, and two percent compared contracts more than five years ago.

There are no significant changes from 2018 to 2022.

- It is more common to have compared contracts during the last 12 months among younger than among older respondents (66% of those under 35, 53% of those between 35 and 49, and 45-46% of those 50 or older, compared during the last 12 months).

Those who have compared contracts during the last three years, and who have not switched contracts or signed a new contract, were asked why they chose to keep their current contract.

Figure 101: You have compared different offers but decided to stay in your current contract. Why? Multiple answers possible. Percent of respondents who have compared contracts in the past three years but not switched.



About half respond that they chose to keep their current contract because they were satisfied with the contract. 31 percent state that there was little or no saving from switching, and 25 percent say that the binding period for their current contract had not expired.

Twelve percent say that they wanted to keep their current supplier as it is a local supplier, and 11 percent say it was difficult to understand the differences between contracts. It was less common to stay with the current contract because the switching process was too complicated (6%), because of difficulties finding relevant information (6%), and because they were unable to switch (5%).

Four percent cite other reasons for deciding to stay in their current contract, and one percent are unsure.

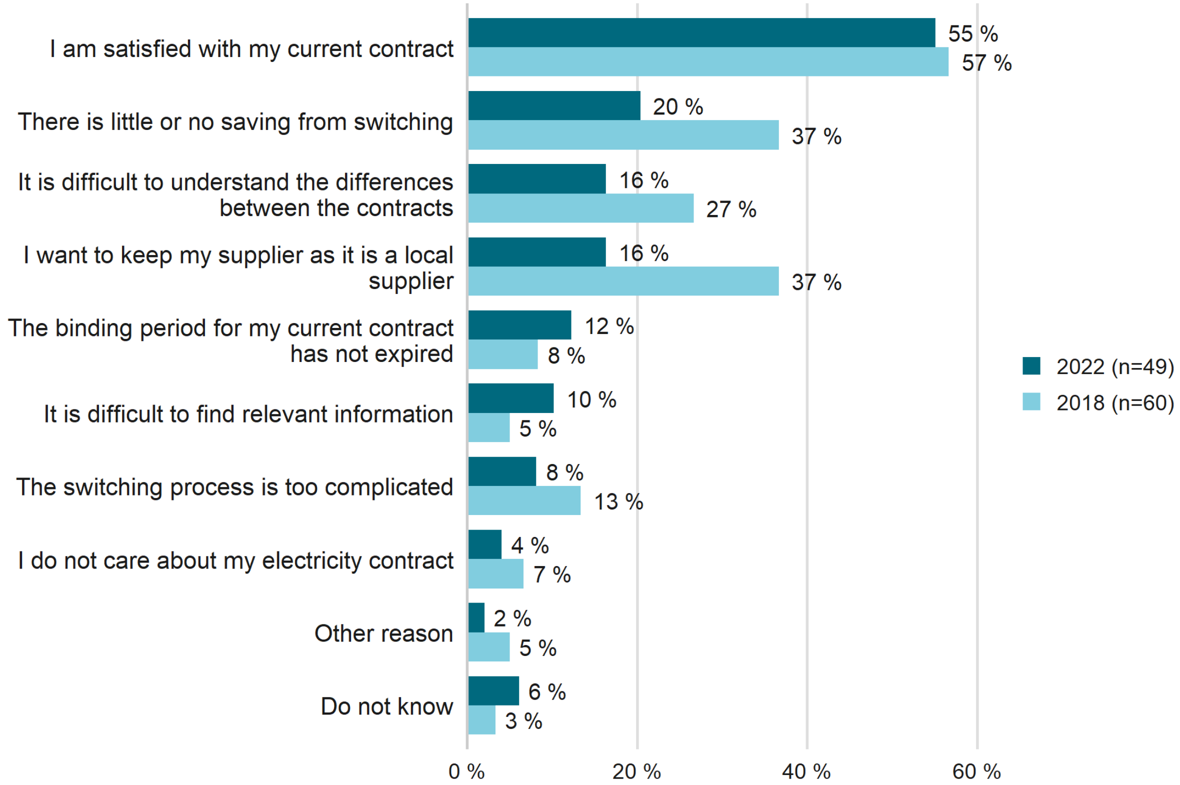
A higher share than in 2018 respond that they stayed in their current contract because the binding period had not expired (17% in 2018 and 25% in 2022), and a lower share respond that there was little or no saving from switching (41% in 2018 and 31% in 2022).

- A higher share of respondents under 35 say that the switching process was too complicated (13%), compared with older respondents (3–5%).

- A higher share of *aware* customers (32%) than of *inactive* customers (15%) respond that the binding period had not expired. On the other hand, a higher share of *inactive* customers (55%) than of *aware* customers (43%) respond that they were satisfied with their current contract.
- A higher share of respondents who have a fixed-price contract respond that the binding period of their current contract had not expired (32%), compared to those who have a variable-price contract (9%). On the other hand, higher shares of respondents who have a variable-price contract say that there was little of no saving from switching (44%, compared to 25%), that they wanted to keep their supplier as it is a local supplier (20%, compared to 9%), that it was difficult to understand the differences between the contracts (19%, compared to 6%), and that the switching process was too complicated (11%, compared to 3%).

Those who have neither switched nor compared contracts in the past three years were asked why they have not done so more often.

Figure 102: Why have you not switched or compared contracts more often? Multiple answers possible. Percent of respondents who have neither signed a new contract nor compared contracts in the past three years.



About half respond that they have not switched or compared contracts more often because they are satisfied with their current contract (55%). 20 percent say that there is little or no saving from switching, 16 percent respond that it is difficult to understand the differences between contracts, and just as many want to keep their local supplier as it is a local supplier (16%).

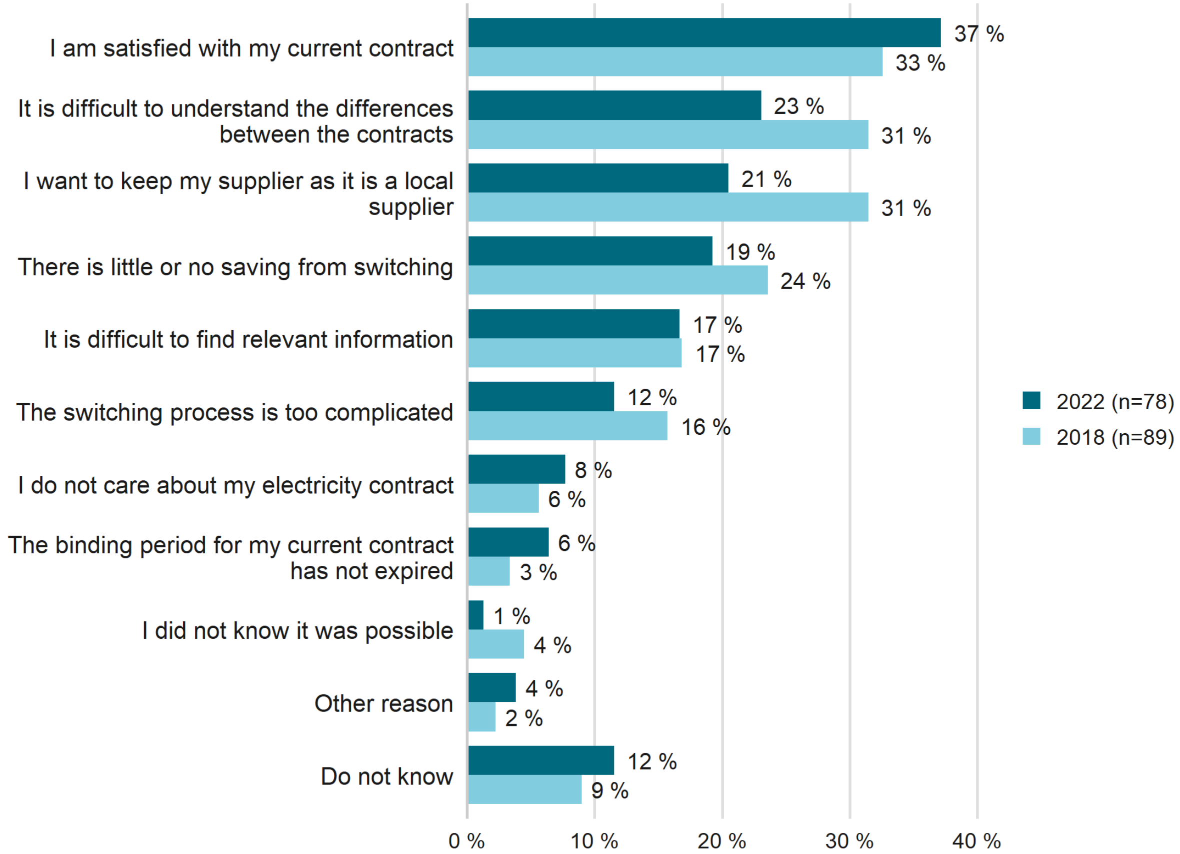
Lower shares respond that the binding period had not expired (12%), that it is difficult to find relevant information (10%), that the switching process is too complicated (8%), and that they do not care about their electricity contract (4%).

Two percent state other reasons, and six percent are unsure.

Due to the low number of responses to the question there are no significant changes from 2018 to 2022.

Those who have never switched or compared contracts were asked why they had never done this.

Figure 103: Why have you never switched or compared contracts? Multiple answers possible. Respondents who have never switched or compared contracts.



The most common reasons for never switching or comparing contracts are satisfaction with the current contract (37%), finding it difficult to understand the differences between contracts (23%), and wanting to keep the supplier as it is a local supplier (21%). Further, 19 percent say that there is little or no saving from switching, 17 percent say that it is difficult to find information, and 12 percent say that the switching process is too complicated.

It is less common that respondents have never switched or compared contracts because they do not care about their electricity contract (8%), because the binding period had not expired (6%), or because they did not know that it is possible (1%).

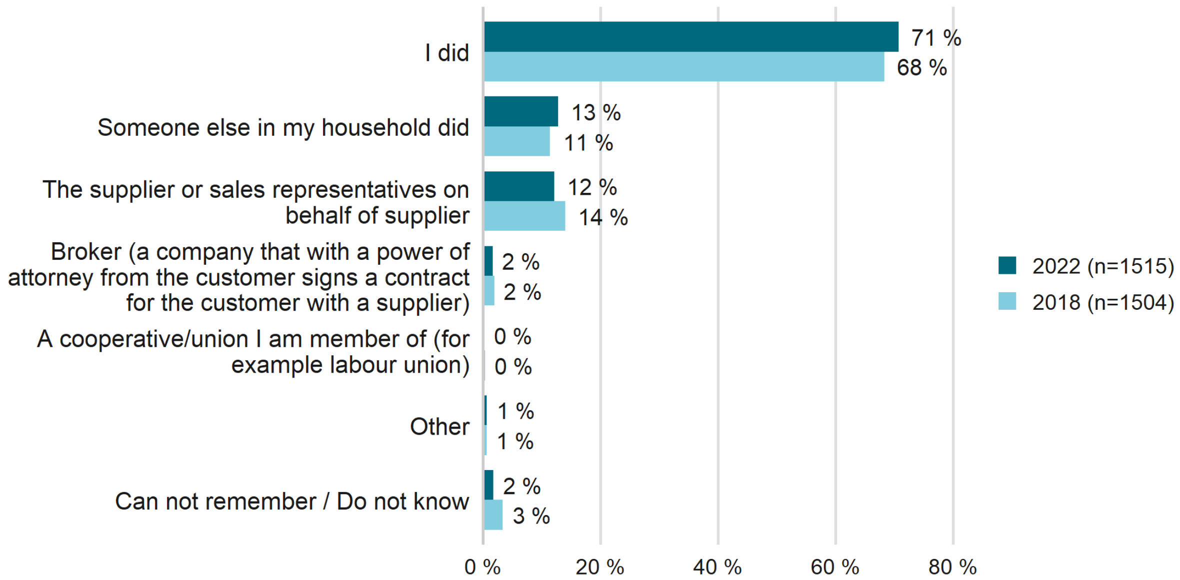
Four percent state other reasons, and 12 percent are unsure.

There are no significant changes from 2018 to 2022 due to the low number of responses to the question.

The contract-signing process

The respondents were asked questions related to the signing process, including who initiated the signing of their current contract, how they proceeded to choose the contract, how they were contacted, etc.

Figure 104: Who initiated the signing of your current contract?



Seven-in-ten Finnish respondents initiated the signing of their current contract themselves (71%). 13 percent say that someone else in their household initiated the contract signing.

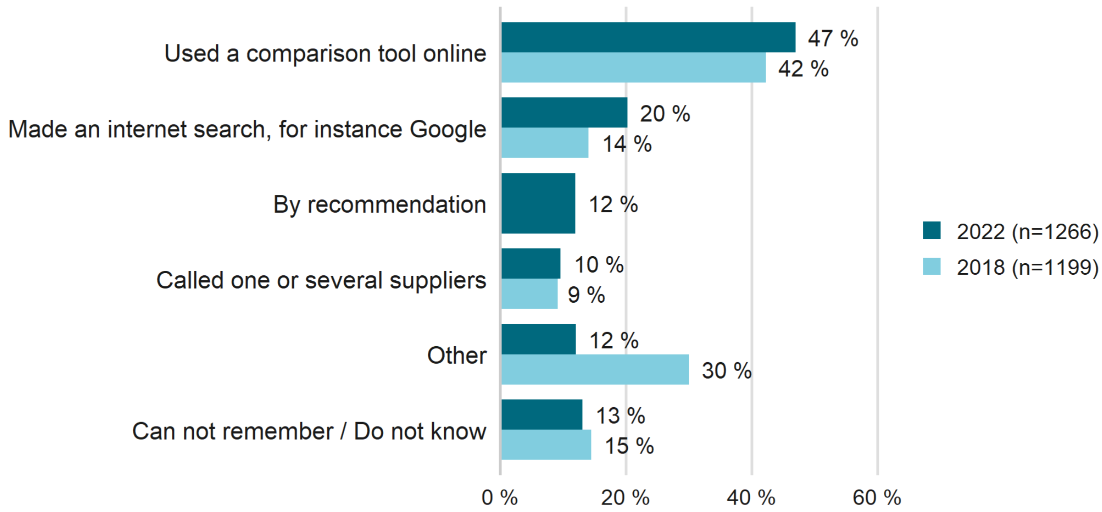
Twelve percent say that the signing was initiated by the supplier or sales representatives on behalf of the supplier. It is less common that a broker (2%), a cooperative/union (less than 1%) or other actors (1%) initiated the signing. Two percent are unsure.

There are no significant changes from 2018 to 2022.

- There is an inverse relationship between age and answering that someone else in the household initiated the signing (from 17% of those under 35 to 9% of those 65 or older). Somewhat more of the respondents under 35 say that a broker initiated the signing (5%), compared to older respondents (0–1%).
- Compared to *aware* and *inactive* customers, a lower share of *active* customers say that someone else in their household initiated the signing of the contract (7%, compared to 16%). Moreover, a higher share of *active* customers say that the supplier, or sales representatives on behalf of the supplier, initiated the signing (20%, compared to 8–9%).
- A higher share of respondents living in apartments initiated the signing themselves (75%), compared with those living in houses (62%). On the other hand, the share who say that someone else in their household initiated the signing is higher among those living in houses (20%), than among those living in apartments (10%).
- A higher share of those who have a fixed-price contract respond that the signing was initiated by the supplier or sales representatives on behalf of the supplier (15%), compared with those who have variable- (8%) or spot-price contracts (6%).

Electricity customers who responded that either they, or someone else in their household, initiated the signing of their current contract, were asked how they *chose* their contract.

Figure 105: How did you go about choosing electricity contract? Multiple answers possible. If signing initiated within own household.



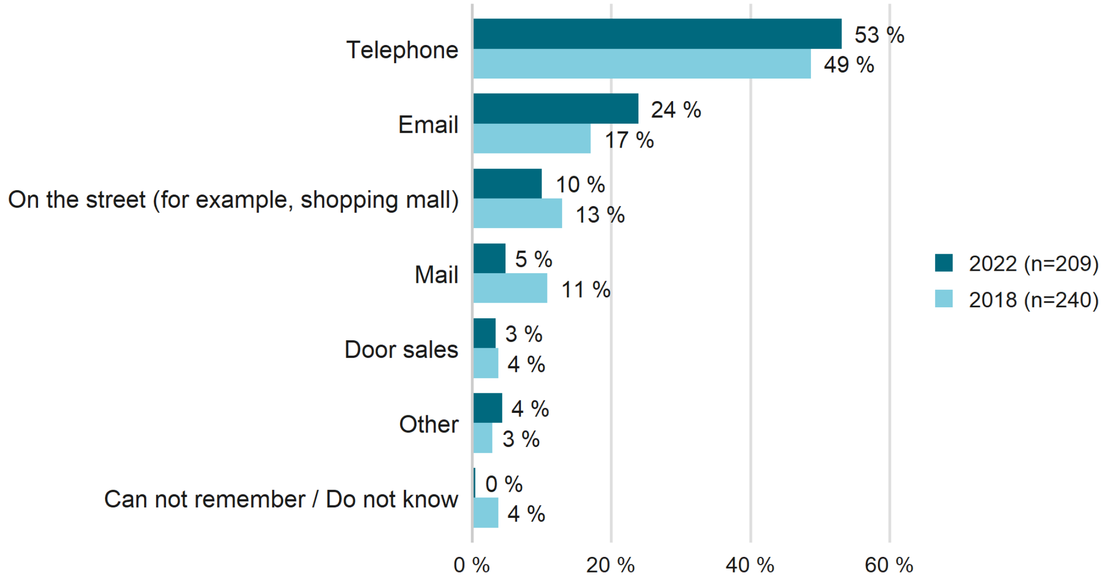
Almost half state that they used a comparison tool online as part of choosing the contract (47%). 20 percent made an internet search, 12 percent followed a recommendation, 10 percent called one or several suppliers, and 12 percent used other methods. 13 percent do not know or remember how the choice was made.

Compared with 2018, more respondents say that they did an internet search (14% in 2018 and 20% in 2022). Further, the share of the respondents who cite other methods is lower in 2022 than in 2018 (note that "By recommendation" was added to the questionnaire in 2022).

- More among the younger respondents performed an internet search, compared with older respondents (ranging from 29% of respondents under 35 to 16% of those who are 50 or older). More of the *older* respondents report other methods (ranging from 19% of those 65 or older to 4% of those under 35).
- Higher shares of *active* (58%) and *aware* (62%) customers used a comparison tool online, compared with *inactive* customers (30%). Conversely, higher shares of *inactive* customers based their choice on a recommendation (15%, compared with 9%) or say that they do not know or remember how the choice was made (21%, compared with 6–8%).
- A higher share of those who receive their bill electronically used a comparison tool online (52%), compared with those who receive it as a paper invoice by mail (35%). On the other hand, those with paper bills had more often called one or several suppliers (14%, compared to 8% of those with electronic bills).

Those electricity customers who stated that they were contacted by an electricity supplier, or a broker, were asked how they were contacted.

Figure 106: How did they contact you? Percent of respondents who were contacted by a supplier or broker.



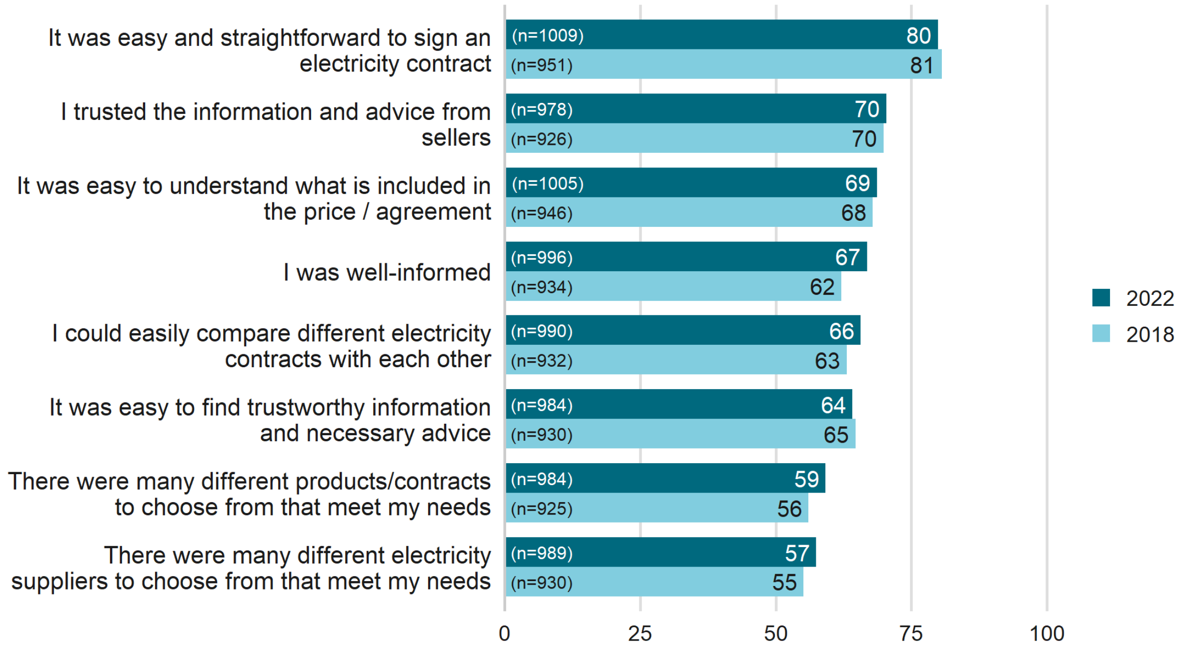
More than half of those who were contacted by an electricity supplier or broker were contacted by telephone (53%). 24 percent were contacted by e-mail, and 10 percent were contacted on the street/in a public space. It is less common that the respondents were contacted by mail (5%), via door sales (3%), or via other forms for contact (4%).

There are no significant changes differences between 2018 and 2022.

- A higher share of those under 35 were contacted via door sales (14%), compared with older respondents (0–2%).
- A higher share of those who have a variable-price contract were contacted via door sales (13%), compared to those who have a fixed-price contract (1%).

Respondents who have signed a new contract in the past three years were asked to consider different statements related to this process.

Figure 107: Before you made your current choice of electricity contract, to what extent did you experience the following …? Average scores: 0=Not at all and 100=High extent. "Do not know" is excluded. Respondents who have signed a new contract in the past three years.



Finnish customers who have signed a contract the last three years experienced to a high extent that it was easy and straightforward to sign the contract (average score of 80 out of 100), and they trusted the information and advice from sellers to a fairly high extent (70).

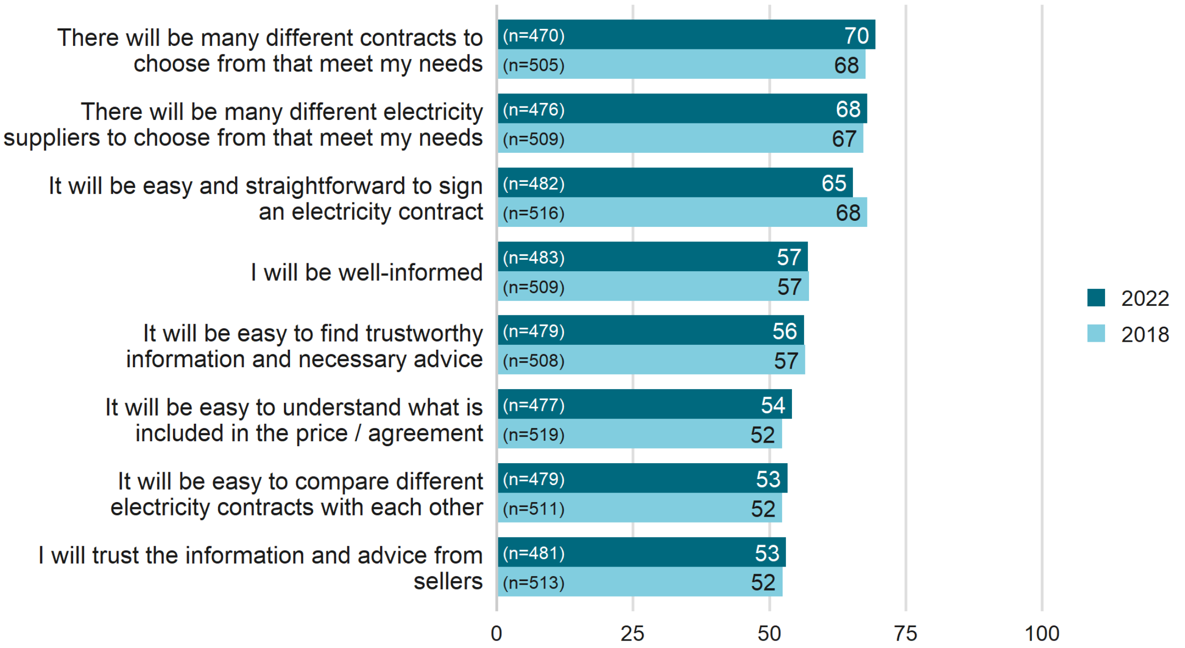
The respondents agree moderately that it was easy to understand what was included in the price/agreement (69), that they were well-informed (67), and that they could easily compare different electricity contracts with each other (66). They agree to some extent that it was easy to find trustworthy information and necessary advice (64), and they agree somewhat that there were many different products/contracts (59) and electricity suppliers (57) to choose from that meet their needs.

The respondents agree somewhat more that they were well-informed in 2022 (67) than they did in 2018 (62).

- Respondents who are 50 or older agree somewhat less than younger respondents that there were many different suppliers and products/contracts to choose from that meet their needs (scores for these two statements range from 53–58 among respondents who are 50 or older, and from 60–63 among those under 50).
- On average, the *active* (68) and *aware* (69) customers felt more well-informed than did the *inactive* customers (63).
- Those who have a fixed-price contract found it easier to understand what is included in the price/agreement (71), compared with those who have a variable- (63) or spot-price contract (61).

Those who have *not* signed a new contract in the past three years were asked to consider different statements concerning a potential future choice of electricity contract.

Figure 108: If you in the future would like to choose an electricity contract, to what extent do you agree that… ? Average scores: 0=Not at all and 100=High extent. "Do not know" is excluded. Respondents who have not signed a new electricity contract in the past three years.



The Finnish customers who have *not* signed a new contract in the past three years agree to a fairly high extent that there will be many different contracts to choose from that meet their needs (70). They agree moderately that there will be many different electricity suppliers to choose from that meet their needs (68), and that it will be easy and straightforward to sign a contract (65).

The respondents agree somewhat that they will be well-informed (57) and that it will be easy to find trustworthy information and necessary advice (56). They are a little more divided when it comes to whether it will be easy to understand what is included in the price/agreement (54), whether it will be easy to compare different contracts to each other (53), and whether they will trust the information and advice from sellers (53).

There are no significant changes from 2018 to 2022.

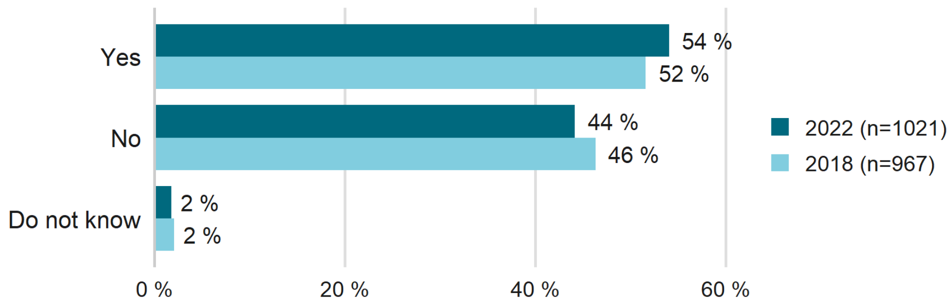
- The youngest respondents agree more that it will be easy to understand that is included in the price/agreement, compared with older respondents (the average scores are 62 among those under 35, 56 among those aged 35–49, and 50-51 among those who are 50 or older).
- On average, the *aware* customers believe more that they will be well-informed (63) than the *inactive* customers do (55).

Comparison tools

The respondents were also asked to consider different questions regarding comparison tools.

The electricity customers who have signed a contract in the past three years were asked if they had visited an online comparison tool at the time.

Figure 109: When you signed/compared your current electricity contract, did you visit an online comparison tool? Respondents who have signed a new contract in the past three years.



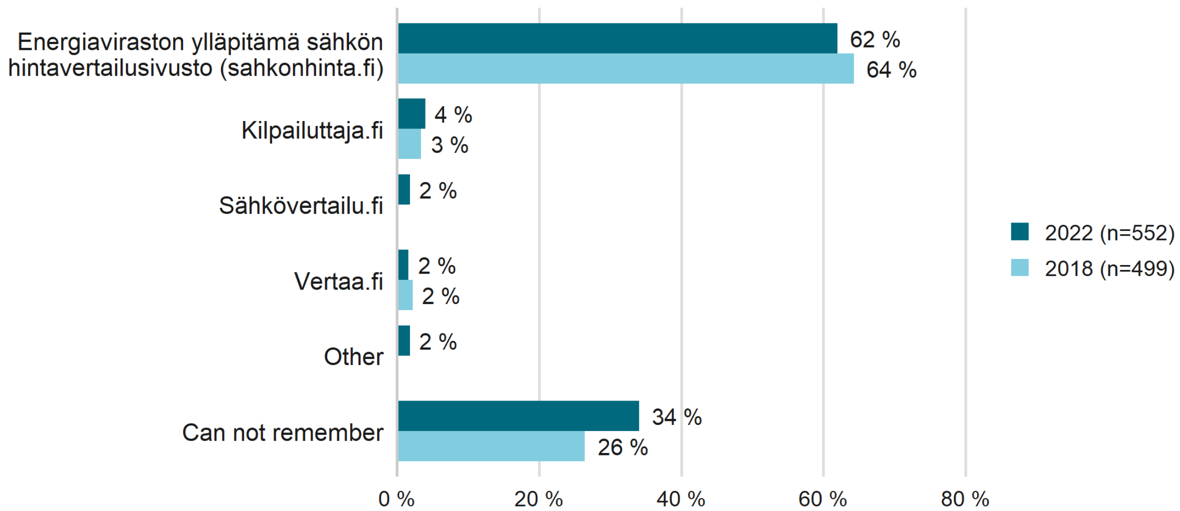
More than half of the Finnish respondents who have signed a contract in the past three years visited an online comparison tool when they signed their current contract (54%). 44 percent did not.

There are no significant differences between 2018 and 2022.

- A higher share of *aware* customers visited an online comparison tool (71%), compared with *active* (52%) and *inactive* customers (46%).
- A higher share of customers with a fixed-price contract visited an online comparison tool (58%), compared with those who have other contracts (43–46%).
- A higher share of respondents living in houses used online comparison tools (62%), compared with those living in apartments (50%).

Those who had visited an online comparison tool were asked to name the tool they had used.

Figure 110: What comparison tool(s) did you visit? Multiple answers possible. Respondents who visited a comparison tool when they signed their current contract.

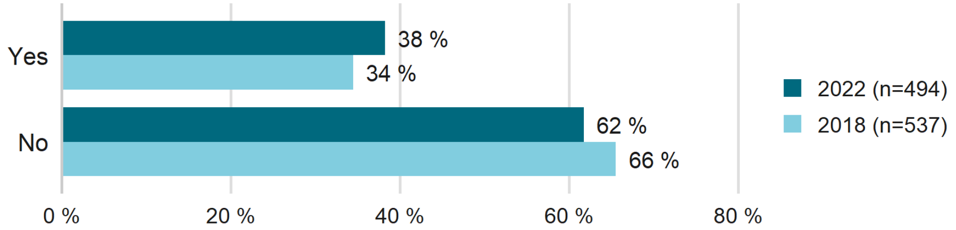


Six-in-ten (62%) of those who had used an online comparison tool visited sahkonhinta.fi, which is the price comparison tool managed by the Finnish energy regulatory authority. Between two and four percent say they visited other comparison tools. Approximately one-in-three cannot remember.

- The *inactive* customers are more unsure about which online comparison tool they visited (45%) than the *active* (32%) and *aware* customers (29%) are.

Those who have *not* signed a contract in the past three years were also asked about comparison tools.

Figure 111: Do you know of any online comparison tools for electricity contracts? Respondents who have not signed a new contract in the past three years.



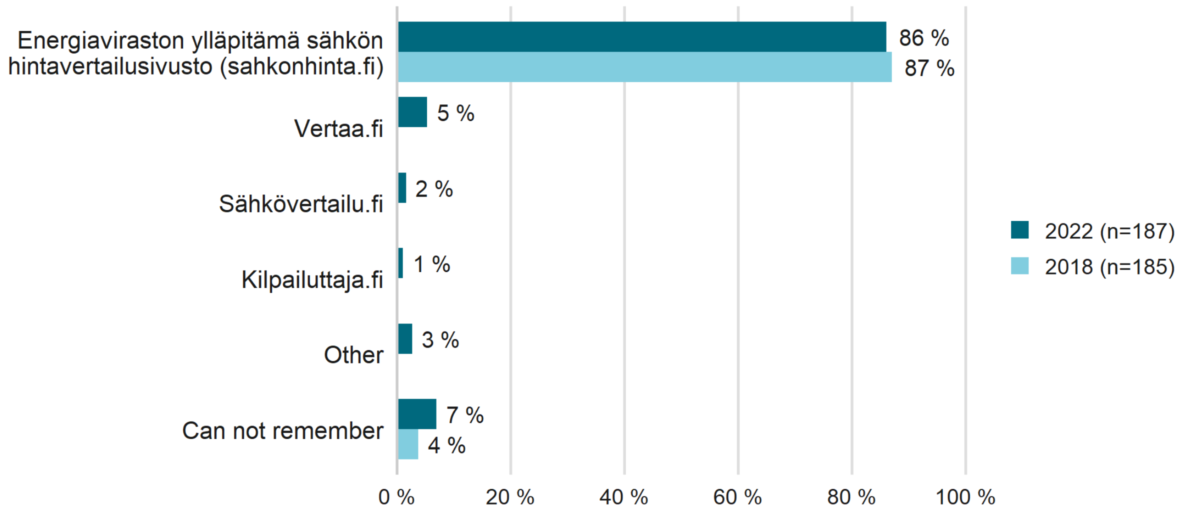
Almost four-in-ten respondents who have *not* signed a contract in the past three years say that they know of at least one online comparison tool (38%).

There are no significant differences between 2018 and 2022.

- A higher share of *aware* (59%) than *inactive* customers (31%) say that they know of (an) online comparison tool(s).
- A lower share of respondents with variable-price contracts say they know of any online comparison tools (31%), compared with those who have other contracts (45–58%).

Those who know of online comparison tools for electricity contracts were asked which comparison tools they had visited online.

Figure 112: What comparison tool(s) have you visited online? Multiple answers possible. Respondents who have not signed a new contract in the past three years who say they know of an online comparison tool.

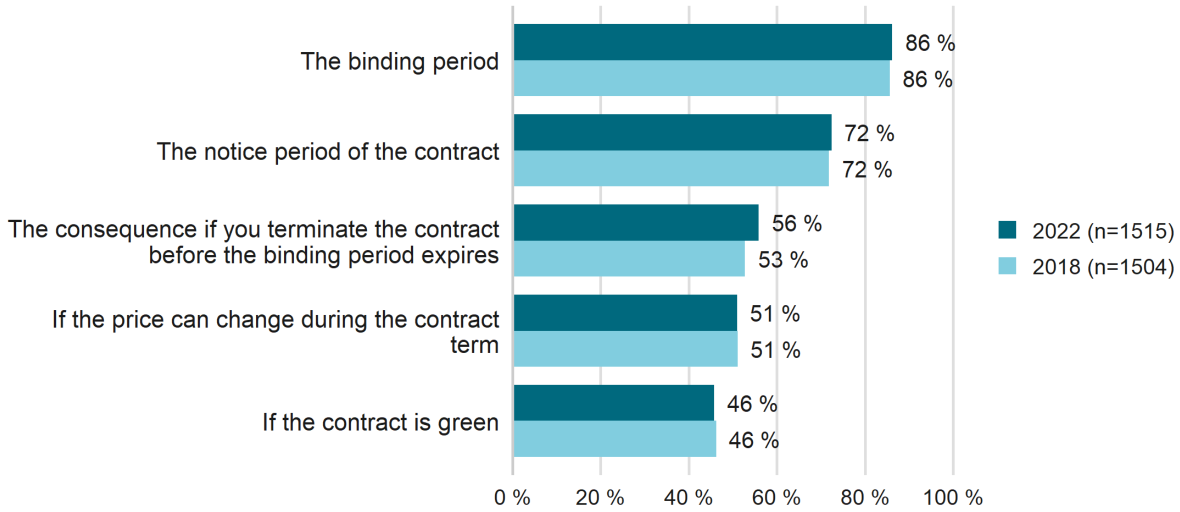


Among those who know of any online comparison tools, 86 percent have visited sahkonhinta.fi. Between one and five percent have used other comparison tools. Seven percent respond that they cannot remember.

Terms of contract

The respondents were asked questions about their current contract and how well they know the terms of the contract.

Figure 113: When you think of your current electricity contract, are you aware of …? Shares who answered "Yes".



The vast majority say that they are aware of the binding period of their current contract (86%), and most are also aware of the notice period of the contract (72%). A majority say that they are aware of the consequence if they terminate the contract before the binding period expires (56%), and around half say that they are aware of whether the price can change during the contract term (51%). 46 percent are aware of whether their contract is green.

There are no significant changes from 2018 to 2022.

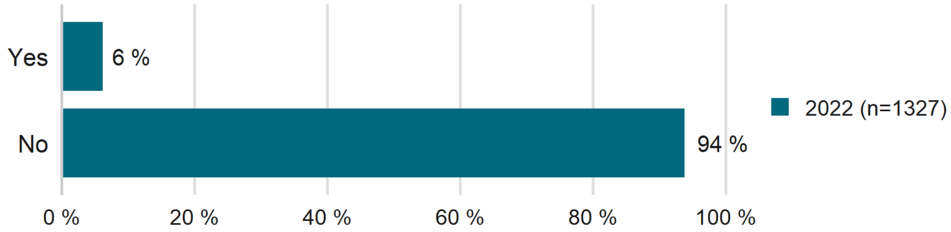
- Awareness increases with age for: The notice period of the contract (from 67% of those under 35 to 78% of those who are 65 or older); the consequences of terminating the contract before the binding period expires (from 49% to 60%), and the binding period of the contract (from 81% of those under 35 to 89–90% of those who are at least 50). Conversely, there is an inverse relationship between age and reported awareness of whether the price can change during the contract term (from 57% of respondents under 35 to 41% of respondents aged 65 or older).
- A higher share of *inactive* customers are aware of whether the price can change during the contract term (60%), compared with *active* (39%) and *aware* customers (53%). Otherwise, *inactive* customers are generally less aware of the terms of their current electricity contract, compared to *active* and *aware* customers.
- Higher shares of those who have variable- or spot-price contracts (87% and 97%, respectively) say that they are aware of whether the price can change during the contract term, compared to those with fixed-price contracts (31%). A somewhat higher share of those with fixed price are aware of their binding period (90%), compared with those who have variable price (83%) or spot price (84%).

Negative experiences and complaints

In 2022, the survey also included a section exploring customers' negative experiences with the electricity market.

Respondents who had signed a contract were asked if they had experienced problems with their new supplier after signing their current contract, and whether they made a complaint regarding their problem.

Figure 114: After you signed your current contract, did you experience problems with your new electricity supplier? Respondents who have ever signed a contract.

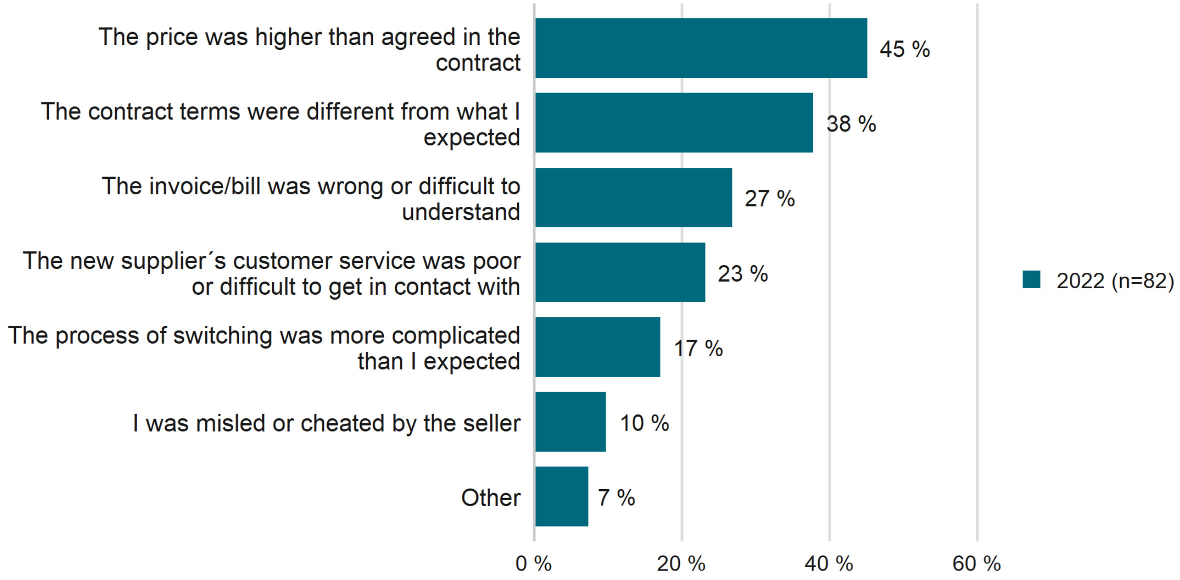


Six percent have experienced problems with their new electricity supplier.

- The share who experienced problems is higher among those under 35 (14%), and lower among those aged 65 or older (2%), compared with respondents aged 35–64 (5–6%).
- A higher share of *aware* customers experienced problems (11%), compared with *active* and *inactive* customers (both 5%).
- A lower share of respondents who have fixed-price contracts (4%) say that they have experienced problems, compared with those who have a variable- (9%) or a spot-price contract (11%).

Those who had experienced problems with their new electricity supplier were asked what kind of problem they experienced.

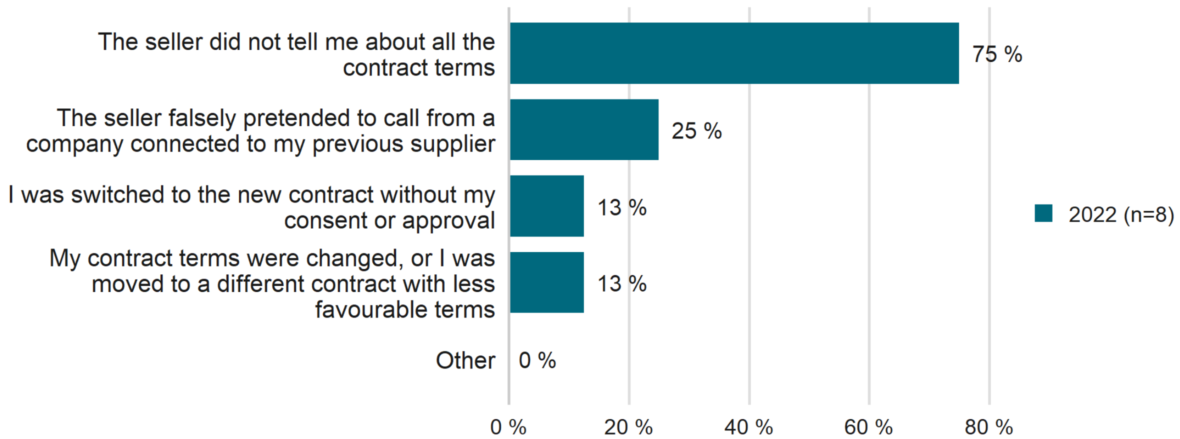
Figure 115: What kind of problem did you experience? Multiple answers possible. Respondents who experienced problems with their new electricity supplier.



Forty-five percent of those who experienced problems with their new supplier respond that the price was higher than agreed in the contract, and 38 percent say that the contract terms were different from what they expected. Approximately one-quarter say that that the invoice/bill was wrong or difficult to understand (27%) or that the new supplier's customer service was poor or difficult to get in contact with (23%). It was less common that respondents experienced the switching process as more complicated than they expected (17%) and that they were misled or cheated by the seller (10%). Seven percent cite other problems.

Those who responded that they were misled or cheated by the seller were asked how this happened.

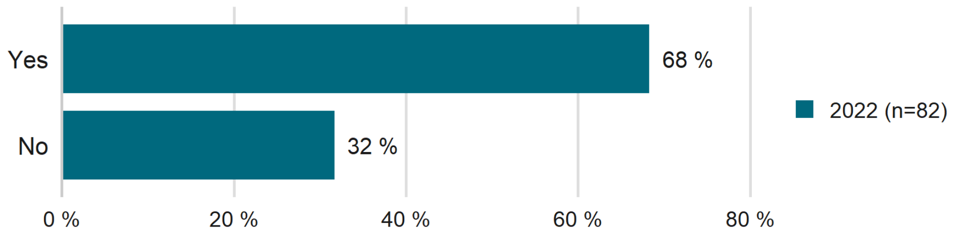
Figure 116: In what way were you misled or cheated by the seller? Multiple answers possible. Respondents who were misled or cheated by the seller.



The majority of those who claim to be misled or cheated by the seller respond that the seller did not tell them about all the contract terms. It is less common that the seller pretended to call from a company related to the previous supplier, that they were switched to the new contract without their consent/approval, or that there was a change in contract terms/the respondent was moved to a different contract with less favorable terms. **Note that only eight respondents were asked this question.**

Those who had experienced problems with their new electricity supplier were also asked whether they had made a complaint.

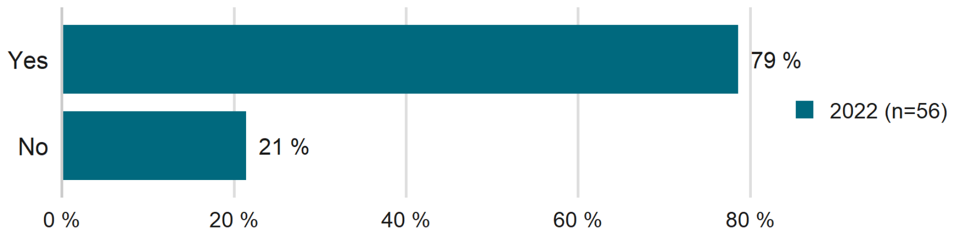
Figure 117: Did you make a complaint regarding your problem? Respondents who experienced problems with their new electricity supplier.



Almost seven-in-ten respondents who experienced problems with their new contract made a complaint about the problem (68%).

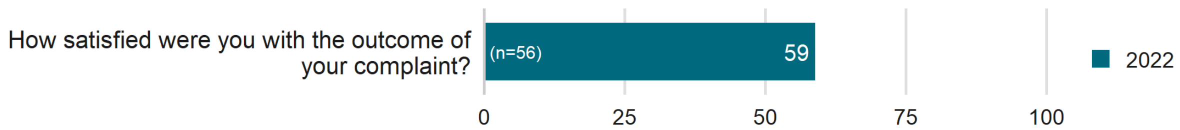
Those who had complained were asked if the problem got fixed due to the complaint – and how satisfied they were with the outcome.

Figure 118: Did your problem get fixed due to your complaint? Respondents who experienced problems with their new electricity supplier and have complained.



Eight-in-ten say that the problem got fixed due to their complaint (79%).

Figure 119: How satisfied were you with the outcome of your complaint? Average scores: 0=Very dissatisfied and 100=Very satisfied. "Do not know" is excluded. Respondents who experienced problems with their new electricity supplier and made a complaint.

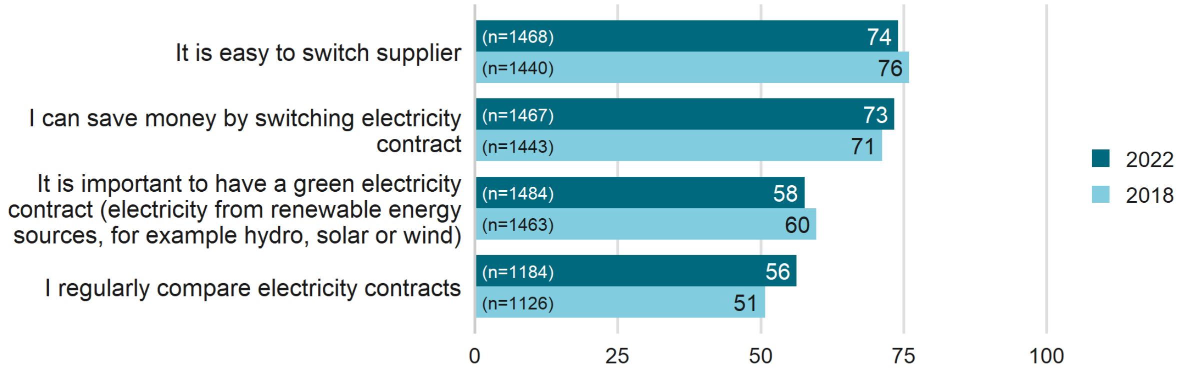


When it comes to satisfaction with the outcome of the complaint, the respondents tend, on average, to be more satisfied than dissatisfied (score of 59 on a scale from 0 to 100). 45 percent say that they were satisfied, while 23 percent say that they were dissatisfied.

The Finnish customers’ attitudes towards the electricity market

The respondents were asked to consider different statements concerning the electricity market.

Figure 120: To what extent do you agree with the following statements …? Average score: 0=Fully disagree and 100=Fully agree. “Do not know” is excluded. Respondents who had not compared their current contract were not asked whether they regularly compare electricity contracts.



The Finnish respondents agree to a fairly high extent that it is easy to switch supplier (74) and that they can save money by switching electricity contract (73). They also agree somewhat that it is important to have a green energy contract (58) and that they regularly compare electricity contracts (56).

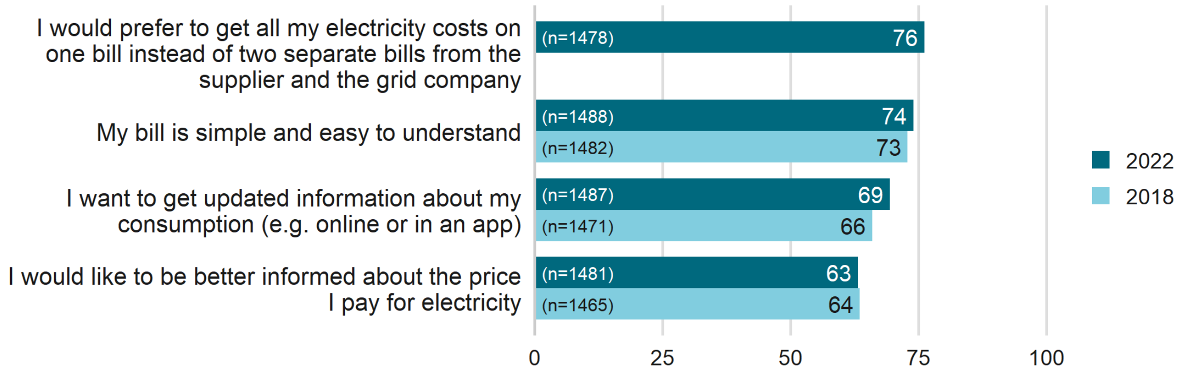
Compared with 2018, the respondents agree more that they regularly compare contracts (from 51 in 2018 to 56 in 2022).

- Respondents who are 65 or older agree somewhat less strongly that they can save money by switching contracts (70), compared with younger respondents (74-75).
- *Active* customers agree to a higher extent than *aware* and *inactive* customers that it is easy to switch suppliers (average scores are 79 among *active*, 76 among *aware,* and 69 among *inactive* customers) and that they can save money by switching contracts (79 among *active*, 74 among *aware,* and 68 among *inactive* customers). Moreover, *active* (57) and *aware* customers (62) tend to agree that they regularly compare contracts – whereas *inactive* customers are evenly divided on this (50).
- Those living in houses agree more that they regularly compare contracts (62), compared to those in apartments (54). Respondents in apartments agree somewhat more that it is important to have a green contract (59), compared with those who live in houses (54).
- Respondents who have a fixed-price contract agree more strongly that it is easy to switch supplier (76) and that they can save money by switching contracts (76), compared with those who have a variable-price contract (71 and 67, respectively). Finally, those who have fixed-price contracts tend to agree that they regularly compare contracts (60), while those who have variable-price contracts neither agree nor disagree (49).

Billing and information

The respondents were asked to consider different statements concerning billing and information.

Figure 121: To what extent do you agree with the following statements …? Average score: 0=Fully disagree and 100=Fully agree. "Do not know" is excluded.



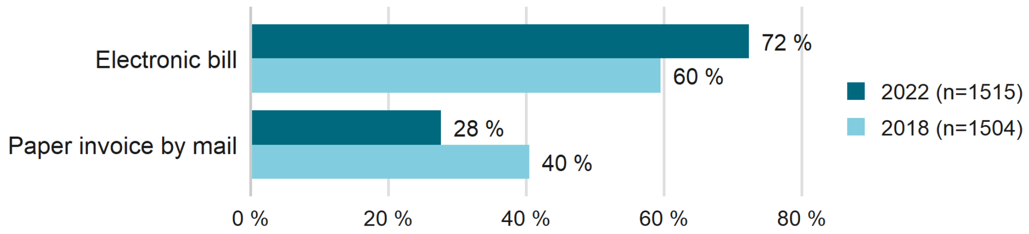
The Finnish respondents mostly agree that they would prefer to get all their electricity costs on one bill instead of two separate bills (from the supplier and the grid company) (76). They agree to a fairly high extent that their bill is easy to understand (74) and to a moderate extent that they want to get updated information about their consumption (69). They agree to some extent that they would like to be better informed about the price they pay for electricity (63).

Compared with 2018, the respondents agree somewhat more that they want to get updated information about their consumption (up from 66 in 2018 to 69 in 2022).

- There is an association between age and how strongly the respondents agree that they want to get updated information about their electricity consumption (ranging from 65 among those under 35 to 74 among those 65 or older).
- *Active* customers agree to a higher extent that their bill is simple and easy to understand (78), compared with *aware* (73) and *inactive* customers (71). *Inactive* customers agree less strongly that they want to get updated information about their consumption (66) than *active* and *aware* customers do (72-73).
- Those who have a fixed-price contract agree more strongly that their bill is simple and easy to understand (76), compared to those who have a variable-price contract (71) or a spot-price contract (66). Respondents who have a variable-price contract agree less that they want to get updated information about their consumption (65), compared to respondents with other contracts (70-72).
- Respondents who live in an apartment agree more strongly that they would prefer to get all their electricity costs on one bill (78), compared with respondents who live in a house (72). Those who live in a house agree more that they want to get updated information about their consumption (73), compared with those who live in an apartment (68).

The electricity customers were also given different questions about the electricity bill; about how they receive it; and what information they read on the bill.

Figure 122: How do you receive your electricity bill?

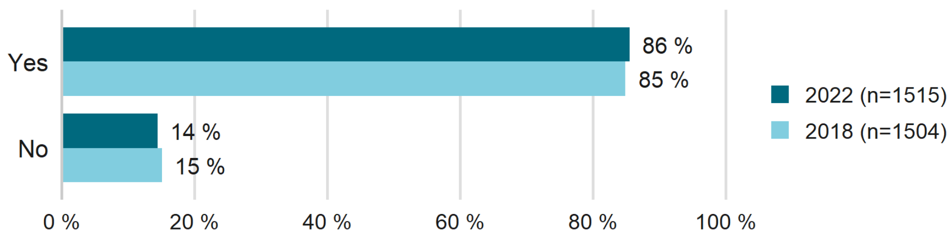


Seven-in-ten Finnish respondents receive their bill electronically (72%). Three-in-ten receive a paper invoice by mail (28%).

The share of electronic bills has increased from 60 percent in 2018 to 72 percent in 2022.

- A higher share of those who are 65 or older receive their bill electronically (83%), compared with younger respondents (67–71%).
- A lower share of *inactive* customers receive their bill electronically (66%), compared with *active* (76%) and *aware* customers (78%).
- A higher share of those who have a fixed-price contract receive their bill electronically (75%), compared with those who have a variable-price contract (67%).

Figure 123: Do you read the information presented on your electricity bill?



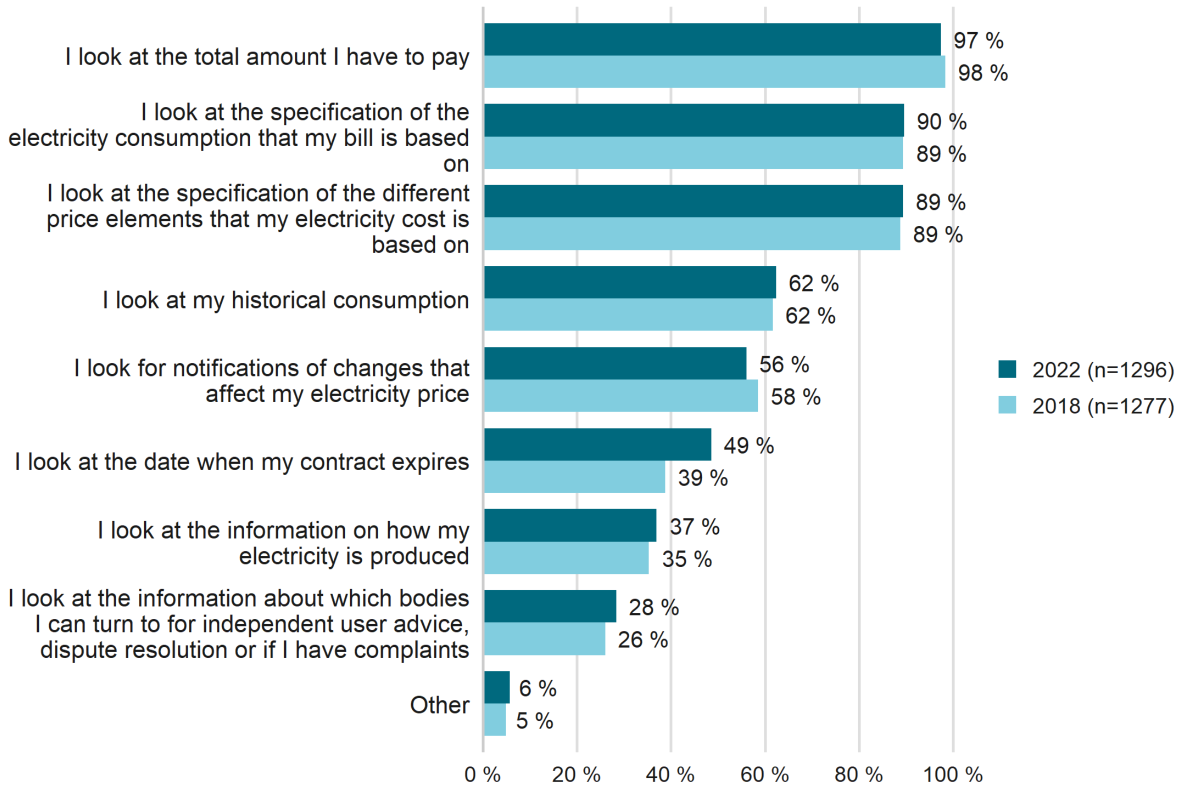
The vast majority of respondents read the information presented on their electricity bill (86%).

There is no significant change from 2018 to 2022.

- There is an association between age and the share of respondents who read the information on their bill, ranging from 77 percent of those under 35 to 93 percent of those 65 or older.
- Higher shares of *active* (89%) and *aware* customers (91%) read the information presented on the bill, compared with *inactive* customers (80%).
- A higher share of respondents living in houses read their bill (91%), compared to those living in apartments (83%).

The electricity customers who stated that they read the information presented on the electricity bill were asked what information they read on their bill.

Figure 124: What information do you read on your electricity bill? Respondents who say they read their bill. Shares who answer, "Yes".



Almost all the Finnish customers who read their electricity bill look at the total amount they must pay (97%), and nine-in-ten look at the specification of the electricity consumption that their bill is based on (90%) and the specification of the different price elements that their electricity cost is based on (89%). The majority also look at their historical consumption (62%) and look for notifications of changes that affect their electricity price (56%). About half look at the contract expiration date (49%).

It is less common to look at information on how electricity is produced (37%) and information about where to go for independent advice, dispute resolution, or in case of complaints (28%).

Six percent look at other information on their bill.

Compared with 2018, more respondents look at their contract's expiration date (39% in 2018 and 49% in 2022).

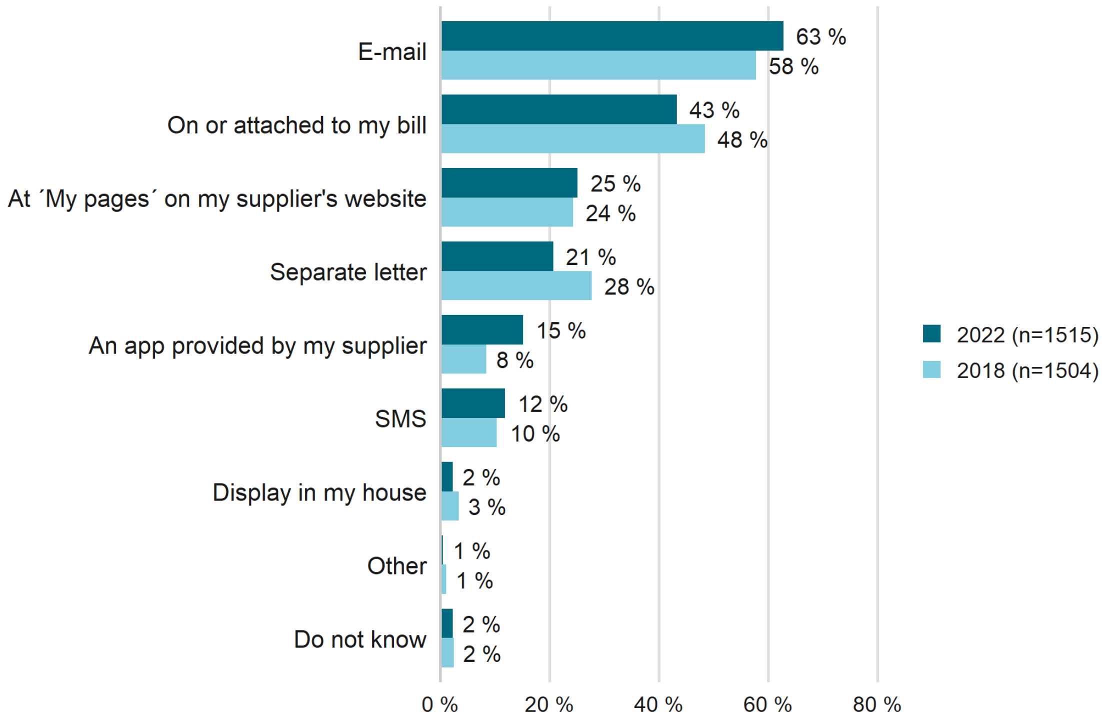
- Older respondents are more interested in their historical consumption (ranging from 67% of those 65 or older to 54% among those under 35), and respondents over 65 are also more inclined to look at the expiration date (59%), compared with younger respondents (42–46%). Moreover, somewhat fewer of the respondents under 35 look at the total amount they have to pay (93%), compared with the older respondents (97–99%).
- Higher shares of *active* and *aware* customers than of *inactive* customers look at the specification of different price elements (91%, compared to 86%), the contract expiration date (54–55%, compared to 40%), and their historical consumption (66%, compared to 56%).
- A higher share of respondents with fixed-price contracts read information about the contract expiration date (57%), compared to those who have variable price (33%) or spot price (43%).

Fewer of those who have variable-price contracts look at information about their historical consumption (54%), compared to those with other contracts (65–66%).

- A higher share of those who receive their bills electronically read information about the expiration date of their contract (51%), compared to those who receive paper bills (43%).
- A higher share of the respondents who live in a house look at information about their historical consumption (71%), compared with those who live in an apartment (58%).

The respondents were asked how they prefer to get information from their electricity supplier.

Figure 125: How do you prefer to get information from your electricity supplier? Multiple answers possible.



Just over six-in-ten prefer to get information from their electricity supplier via e-mail (63%). 43 percent prefer to read it on or attached to their bill.

Twenty-five percent prefer to read information at "My pages" on their supplier's website, and 21 percent prefer to receive a separate letter. Lower shares prefer their information on an app provided by their supplier (15%), via SMS (12%), and on a display in their house (3%).

One percent name other information channels, and two percent are unsure.

Compared with 2018, higher shares prefer to get the information via e-mail (58% in 2018 and 63% in 2022) and via an app (8% in 2018 and 15% in 2022), while lower shares prefer to get the information on or attached to their bill (48% in 2018 and 43% in 2022) and in a separate letter (28% in 2018 and 21% in 2022).

- Fewer of the respondents under 35 prefer to get information via e-mail (56%), compared with older respondents (62–69%).
- Lower shares of *inactive* customers than of *active* and *aware* customers prefer to get information via e-mail (56%, compared with 68%) or via an app provided by the supplier (9%,

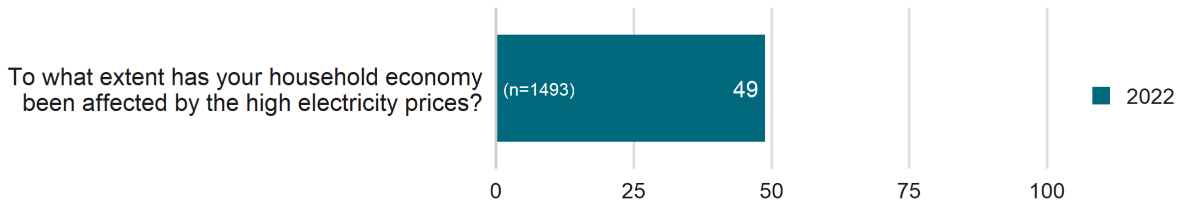
compared with 18–23%). On the other hand, more of the *inactive* customers prefer to get information in a separate letter (25%, compared with 18%).

- A higher share of respondents who live in houses want information via an app (19%), compared with those who live in apartments (13%).

The price shock

In 2022, two questions were added to the questionnaire to address the issue of extraordinarily high electricity prices. The respondents were asked to evaluate the impact of increased electricity prices on their household economy – and to reflect on whether the high prices would influence their future choice of electricity contract.

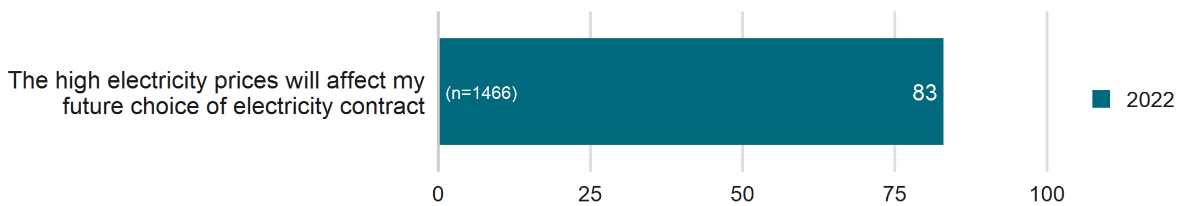
Figure 126: To what extent has your household economy been affected by the high electricity prices? Average scores: 0=Not at all and 100=Very high extent. "Do not know" is excluded.



The Finnish respondents are divided when it comes to whether the high electricity prices have affected their household economy (average score of 49). 36 percent respond that their household economy has been affected to a high or very high extent, while 35 percent respond to a low extent or not at all.

- Respondents aged 65 or older report a lower impact on their household economy (44), compared to younger respondents (48-53).
- Respondents with a fixed-price contract have been less affected by high energy prices (46), compared to respondents with a variable- (54) or a spot-price contract (63).
- Those who live in houses have been more affected by the high electricity prices (59), compared to those living in apartments (45).
- There is an association between annual kWh use and the extent to which the high electricity prices have affected the respondents' household economy (from 40 among those who use less than 5,000 kWh per year, to 59-60 among those who use 15,000 kWh or more).

Figure 127: To what extent do you agree that the high electricity prices will affect your future choice of electricity contract? Average scores 0=Fully disagree and 100=Fully agree. "Do not know" is excluded.



The Finnish respondents broadly agree that the high electricity prices will affect their future choice of electricity contract (83). 80 percent say that they agree, while only 4 percent say that they disagree.

- Respondents under 35 agree to a lower extent that the high electricity prices will affect their future choice of electricity contract (79), compared to older respondents (83-84).

- Respondents living in houses agree to a higher extent that the high electricity prices will affect their future choice of electricity contract (86), compared to respondents who live in apartments (82).
- Respondents with a fixed-price contract agree to a higher extent that the high electricity prices will affect the future choice of electricity contract (86), compared to respondents with a variable- (78) or a spot-price contract (82).
- The high prices will affect the future choices of *active* (87) and *aware* customers (86) to a higher extent, compared to *inactive* customers (78).
- There is an association between the extent to which the respondents have been affected by the high prices and how strongly they agree that the high prices will affect their future choice of electricity contract. The average score ranges from 79 among those who respond that their household economy to a little extent or not at all was affected to 88 among those who say that their household economy affected to a high or very high extent.

The Norwegian customers

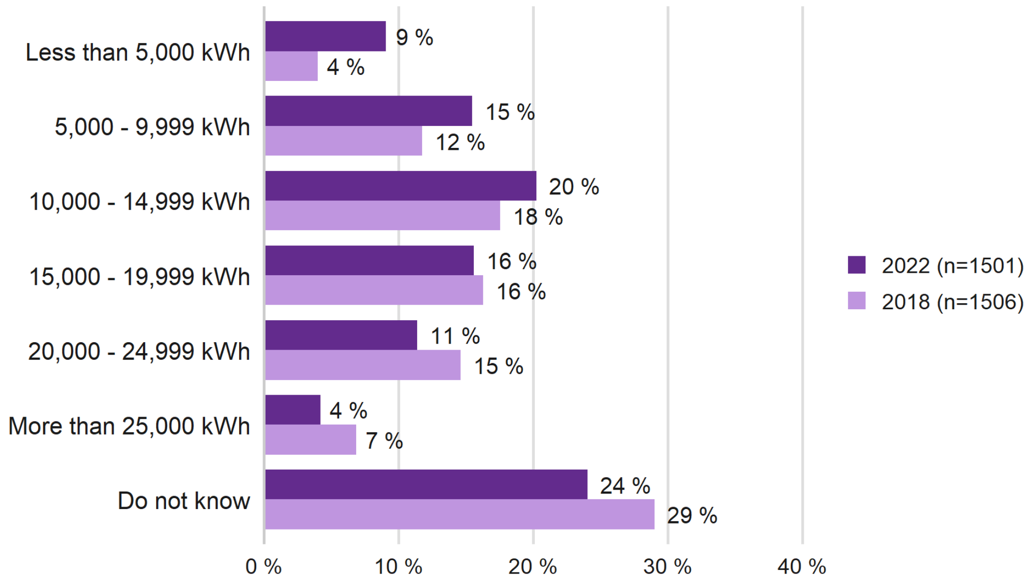
This chapter takes a closer look at the *Norwegian* electricity customers and their presence and participation in the electricity market, as well as their attitudes towards the Norwegian electricity market. Interesting and significant differences between subgroups will be remarked upon and, when possible, the results will be compared with results from 2018.

Note that some results are presented as *average scores* rather than as percentages. This is done when respondents were asked to respond on a five-point scale – for example, from *1 = Fully disagree* to *5 = Fully agree*. The response values have been recoded so that "fully disagree" is set to 0 and "fully agree" is set to 100, with the other categories coded at equal intervals in between. The average of the recoded responses is then presented as a question's "average score" on a scale from 0 to 100. An overview of how these scores are interpreted is available in the methods section of the report.

The Norwegian customers' presence in the electricity market

The respondents were asked different questions about their presence in the Norwegian electricity market.

Figure 128: Approximately how many kilowatt-hours do you use each year?



More than half of the Norwegian respondents use more than 10,000 kWh per year. 20 percent use between 10,000 and 14,999 kWh. 16 percent use between 15,000 and 19,999 kWh, 15 percent use between 5,000 and 9,999 kWh, and 11 percent use between 20,000 and 24,999 kWh. Nine percent use less than 5,000 kWh, while four percent use more than 25,000 kWh pr year.

Compared with 2018, the share of respondents who use less than 5,000 kWh is somewhat higher (12%; up from 6%), while the share of respondents who use 20,000 kWh or more per year is somewhat lower (21%; down from 31%).

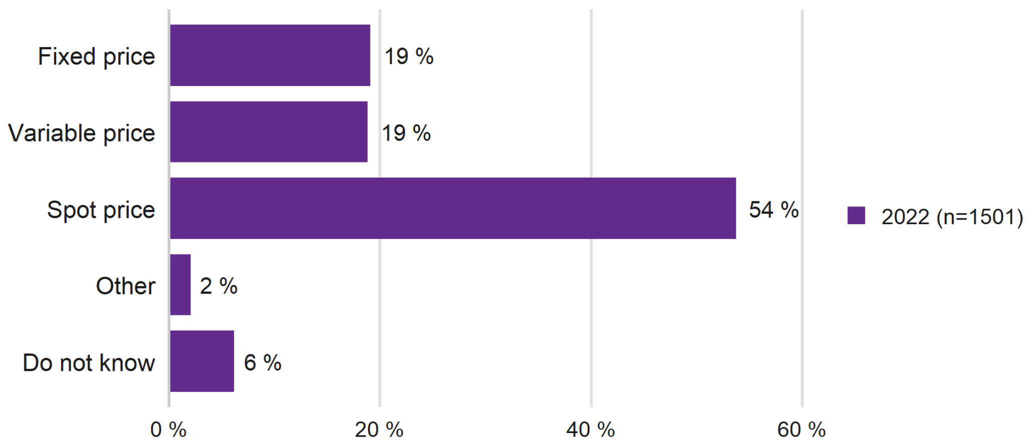
- Respondents who live in houses generally have a higher kWh use per year than those who live in an apartment.

Twenty-four percent of the respondents report that *they do not know* how many kWh they use per year.

- Those who live in apartments are more unsure about their annual usage than those who live in houses (30% and 19%, respectively).
- *Inactive* customers are more unsure about their annual kWh usage (34%), compared with *active* (18%) and *aware* (14%) customers.

In 2022, the respondents were asked what kind of electricity contract they have.[22]

Figure 129: What kind of electricity contract do you have today?



More than half of the Norwegian respondents say they have a spot-price contract (54%). 19 percent have either a fixed- or a variable-price contract. Two percent have some other type of contract, while six percent *do not know* what kind of electricity contract they have.[23]

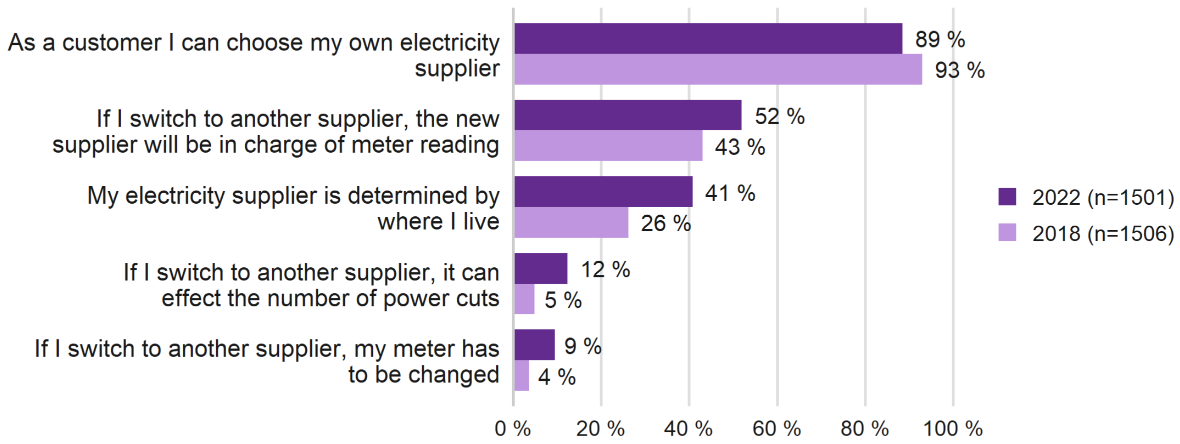
- Fixed-price contracts are more common among respondents under 35 (28%), compared to older respondents (14–19%).
- Spot-price contracts are less common among *inactive* customers (46%) than they are among *active* (62%) and aware customers (57%). Fixed-price contracts are more common among *active* customers (24%) than among others (16–17%), and variable-price contracts are *less* common among *active* customers (10%) than among others (22–24%). Moreover, *inactive* customers more often report that they do not know what kind of electricity contract they have (10%), compared with *active* (3%) and *aware* (2%) customers.

[22] The section "Contract types" (p.22) provides more information about this question.
[23] Note that as this is self-reported information it may diverge considerably from information about contract types gathered by other means.

The Norwegian customers' knowledge of the electricity market

The electricity customers were asked to consider different statements concerning electricity suppliers and the process of switching suppliers.

Figure 130: Do you believe the following statements are correct or not? Shares who believe the statements are correct.



Most of the Norwegian respondents believe that they can choose their own electricity supplier (89%). Moreover, half (52%) believe that if they switch to another supplier, the new supplier will be responsible for meter reading.

Forty-one percent believe that their electricity supplier is determined by where they live, while 12 percent believe that switching to another supplier can affect the number of power cuts. The shares who believe that these statements are *incorrect* are 50 percent and 71 percent, respectively. 9 percent believe that their meter has to be changed if they switch to another supplier, while 79 percent believe that this is *incorrect*.

A notable share of the respondents are unsure of whether a new supplier will be in charge of meter reading (23%) and whether changing your supplier will affect the number of power cuts (17%).

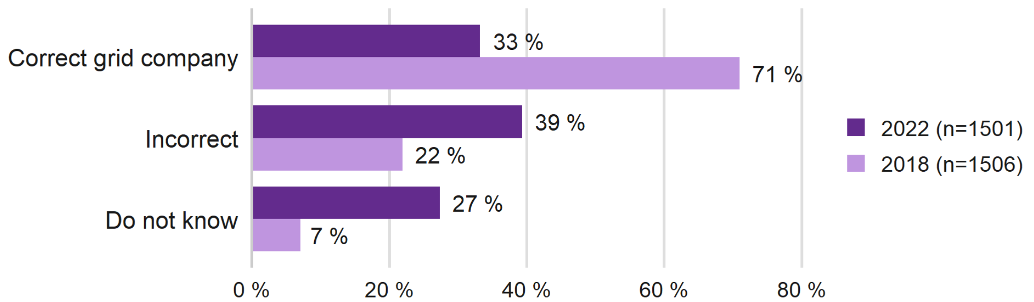
Compared with 2018, somewhat fewer believe that they can choose their own electricity supplier (89%; down from 93%). More respondents now believe that a new supplier will be in charge of meter reading (52%; up from 43%), that their electricity supplier is determined by where they live (41%; up from 26%), that switching suppliers will affect the number of power cuts (12%; up from 5%), and that their meter has to be changed if they switch to another supplier (9%; up from 4%).

- Respondents who are under 35 years old generally tend to have less knowledge of the electricity market, compared to those who are 35 or older.
    - There is an association between age and the share who believe that they can choose their own electricity supplier (from 79% among respondents under 35 to 94% among those who are 65 or older).
    - Further, there is an association between age and the shares who believe that it is *incorrect* that their electricity supplier is determined by where they live (from 35% among those under 35 to 65% among those 65 or older), that their meter has to be changed if they switch supplier (from 65% to 86%), and that switching suppliers can affect the number of power cuts (from 54% to 82%).

- Respondents who have a spot-price contract tend to have more knowledge about the electricity market compared to respondents who have a fixed-price contract or a variable-price contract.
    - A higher share of respondents with spot-price contracts believe that they can choose their own electricity supplier (93%), compared to those who have fixed- or variable-price contracts (84% and 82%, respectively).
    - Compared to respondents who have a fixed-price contract or a variable-price contract, higher shares of the respondents with spot contracts believe that it is *incorrect* that their electricity supplier is determined by where they live (58%, compared with 40% of those with other contract types), that their meter has to be changed if they switch suppliers (89%, compared with 67%), and that switching suppliers can affect the number of power cuts (81%, compared with 57–59%).
- *Active* customers tend to have more knowledge about the electricity market, compared with *inactive* customers. The *inactive* customers tend to be more uncertain as to whether or not the statements are correct.
    - *Inactive* customers believe to a somewhat lower extent that they can choose their own electricity supplier (86%), compared to *active* (93%) and *inactive* customers (88%).
    - A somewhat lower share of *inactive* customers believe that it is *incorrect* that their electricity supplier is determined by where they live (42%, compared with 53–59%), that their meter has to be changed if they switch to another supplier (74%, compared with 81–85%), and that switching suppliers can affect the number of power cuts (65%, compared with 75–77%).

The respondents were asked to name the company that operates the power lines to their home, their own electricity supplier, and two other electricity suppliers.

Figure 131: Name the company that operates the power lines to your home.[24]



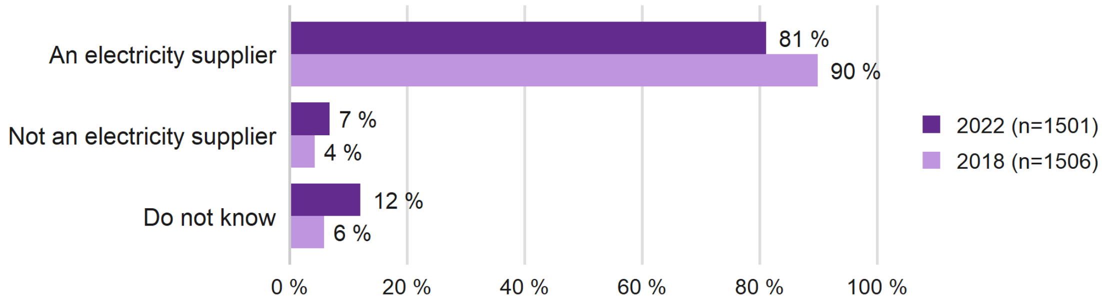
Thirty-three percent of the Norwegian respondents correctly state the name of their grid company. 39 percent give an incorrect name for their grid company, name another grid company, or name something that is not a grid company. 27 percent *do not know* the name of their grid company.

[24] This variable is based on the respondents' postal codes. It should be considered that the postal codes may be incorrect (e.g., if respondents have moved, etc.).

Compared to 2018, a lower share of the respondents can name their grid company (33%; down from 71%). Moreover, there is a higher share who *do not know* the name of their grid company (37% in 2022 and 7% in 2018).[25]

- There is an association between age and the share who correctly name their grid company (from 21% among respondents under 35 to 43% among respondents who are 65 or older).
- A higher share of respondents who receive their bill electronically state the correct name of their grid company (34%), compared to respondents who receive their bill as a paper invoice by mail (17%).
- A higher share of respondents with a spot-price contract state the correct name of their grid company (41%), compared to respondents with a fixed-price contract (25%) or a variable-price contract (22%).
- A higher share of *active* customers state the correct name of their grid company (44%), compared to *aware* (38%) and *inactive* customers (24%).
- A higher share of respondents who live in Western Norway state the correct name of their grid company (52%), compared with those from other parts of Norway (29–39%).

Figure 132: Who is the electricity supplier in your home?



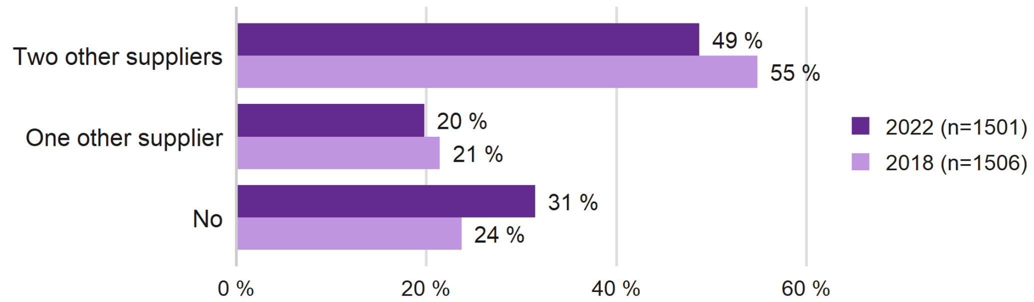
Eight-in-ten Norwegian customers state the name of an actual electricity supplier.[26] Seven percent state something else than an actual electricity supplier. Six percent say that they *do not know* who their electricity supplier is.

Compared to 2018, somewhat fewer state the name of an actual electricity supplier in 2022 (81%; down from 90%).

- Fewer of the youngest respondents know the name of their electricity supplier (ranging from 72% among respondents under 35 to 89–86% among those who are 50 or older).
- More respondents who receive their bills electronically state the correct name of their electricity supplier (83%), compared to respondents who receive paper bills (50%).
- A higher share of respondents with a spot-price contract state the correct name of their electricity supplier (91%), compared to respondents with a fixed-price contract (68%) or a variable-price contract (72%).
- A higher share of *active* customers state the correct name of their electricity supplier (89%), compared to *aware* (80%) and *inactive* customers (76%).

[25] Note that many grid companies have changed names between 2018 and 2022.
[26] We cannot know whether this is their actual electricity supplier or just some supplier.

Figure 133: Can you name two other electricity suppliers?

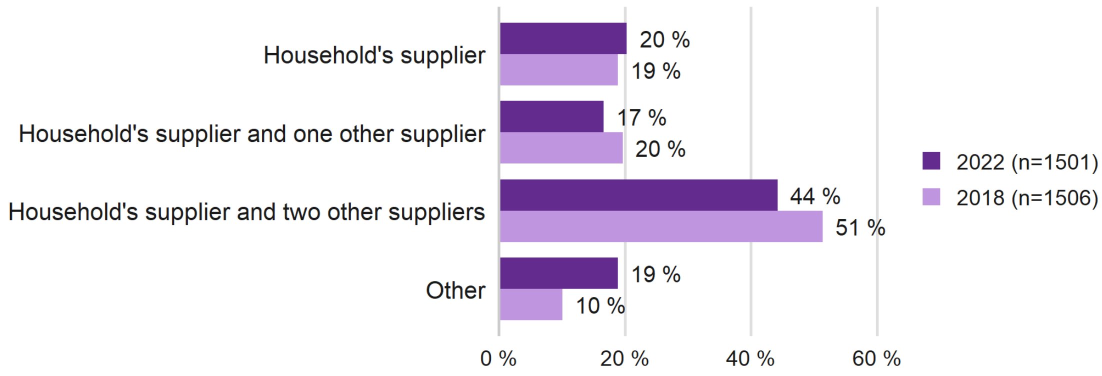


Half of the Norwegian customers state the name of two *other* electricity suppliers. 20 percent state the name of one other supplier, while 31 percent cannot name any other suppliers.

Compared to 2018, a somewhat lower share can name two other electricity suppliers (49%; down from 55%) and a somewhat higher share cannot name any other suppliers (31%; up from 24%).

- There is an association between age and the share who can name two other electricity suppliers (ranging from 40% among respondents under 35 to 57% among respondents who are 65 or older).
- A higher share of respondents who live in a house can name two other electricity suppliers (52%), compared to those who live in an apartment (45%).
- A higher share of respondents who receive their bill electronically can name two other electricity suppliers (51%), compared to respondents who receive their bill as a paper invoice (20%).
- A higher share of respondents with a spot contract can name two other electricity suppliers (59%), compared to respondents with a fixed-price contract (36%) or a variable-price contract (40%).
- A higher share of *active* customers can name the correct name two other electricity suppliers (62%), compared to *aware* (52%) and *inactive* customers (38%).

Figure 134: Total knowledge of electricity suppliers.

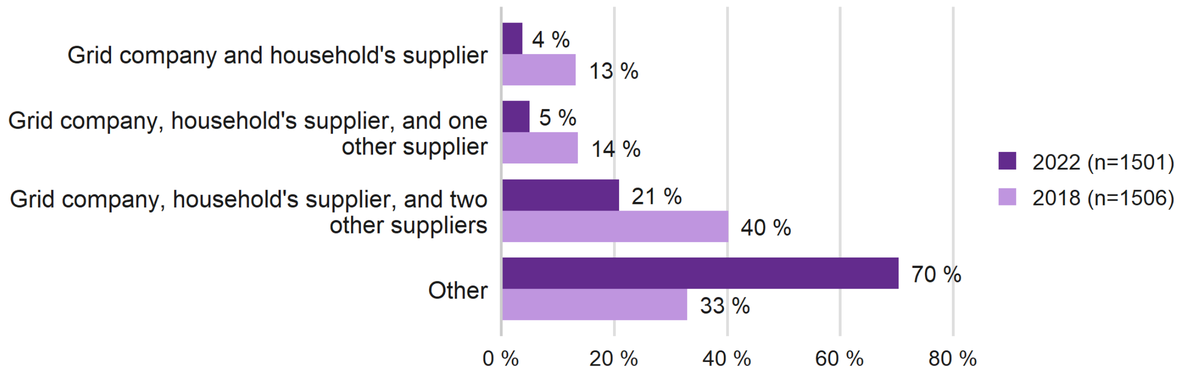


Twenty percent of the Norwegian customers know only their household's supplier. 17 percent also know the name of one other supplier, while 44 percent know both their household's supplier and two other suppliers. 19 percent answer something other than an actual electricity supplier (a grid company or something else), or that they do not know.

Compared to 2018, fewer respondents can name their own supplier and two other suppliers (44%; down from 51%), while more answer something other than an actual electricity supplier (19%; up from 10%).

- There is an association between age and the share who can name their own supplier and two other electricity suppliers (from 36% among respondents under 35 to 51% among respondents who are 65 or older). The share answering something that is not an electricity supplier is higher among respondents under 50 (23–28%) than among older respondents (11–14%).
- A somewhat higher share of respondents living in houses can name their own electricity supplier and two other electricity suppliers (48%), compared to respondents who live in apartments (41%).
- A higher share of the respondents who receive their bills electronically can name their own supplier and two other electricity suppliers (46%), compared to respondents who receive paper bills (16%). Moreover, a higher share of those with paper bills answer something other than an actual supplier (50%), compared to those who have electronic bills (17%).
- A higher share of respondents with a spot-price contract can name their own supplier and two other electricity suppliers (56%), compared to respondents with a fixed-price contract (29%) or a variable-price contract (34%). Also, a lower share of respondents with spot contracts name something other than an actual electricity supplier (9%), compared to respondents with fixed- (32%) or variable-price contracts (28%).
- A higher share of *active* customers can correctly name their own supplier and two other electricity suppliers (58%), compared to *aware* (49%) and *inactive* customers (32%).

Figure 135: Total knowledge of the electricity market.



Four percent of the Norwegian customers correctly name the company operating power lines to their home and one actual electricity supplier. Five percent name their grid company and *two* electricity suppliers, while 21 percent can name their grid company and *three* electricity suppliers.

Seventy percent of the Norwegian customers cannot correctly name the company operating power lines and at least one actual electricity supplier.

Compared to 2018, lower shares now know either i) the names of the company operating power lines to their home and their own electricity supplier (4%; down from 13%), ii) their grid company, their electricity supplier, and *one other* electricity supplier (5%; down from 14%), or iii) their grid company, their electricity supplier and *two other* electricity suppliers (21%; down from 40%). The share of Norwegians who do not know either of these things has increased dramatically – from 33 percent in 2018 to 70 percent in 2022. [27]

- There is an association between age and knowledge about the electricity market: The share who can name their grid company, their electricity supplier, and two other suppliers ranges from 13 percent of those under 35 to 27 percent of those aged 65 or older.
- More of the respondents who live in a house can name their grid company, their electricity supplier, and two other suppliers (24%), compared to those who live in an apartment (18%).
- A higher share of respondents who receive their bills electronically can name their grid company, their electricity supplier and two other suppliers (22%), compared to respondents who receive their bills on paper (3%).
- A higher share of respondents with a spot contract can name their grid company, their electricity supplier and two other suppliers (29%), compared to respondents with a fixed- (12%) or a variable-price contract (11%).
- A higher share of *active* customers can name their grid company, their own supplier and two other electricity suppliers (32%), compared to *aware* (24%) and *inactive* customers (11%).

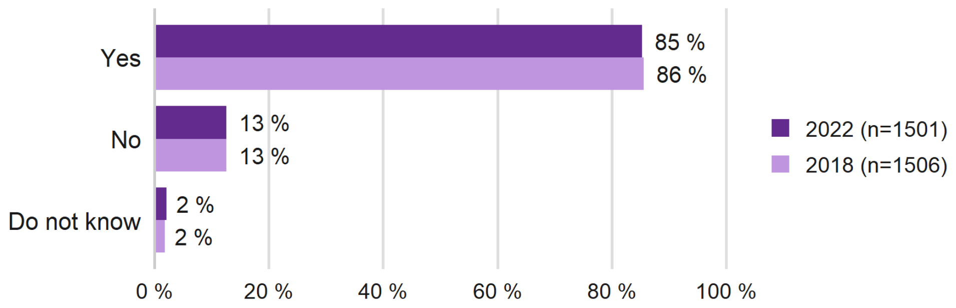
[27] Note that many grid companies have changed names between 2018 and 2022.

The Norwegian customers' participation in the electricity market

Electricity customers were also asked different questions related to their participation in the electricity market, including the process of switching and comparing electricity contracts, the use of comparison tools, and knowledge of contractual terms.

Signing and comparing contracts

Figure 136: Have you ever signed a new contract with an electricity supplier?



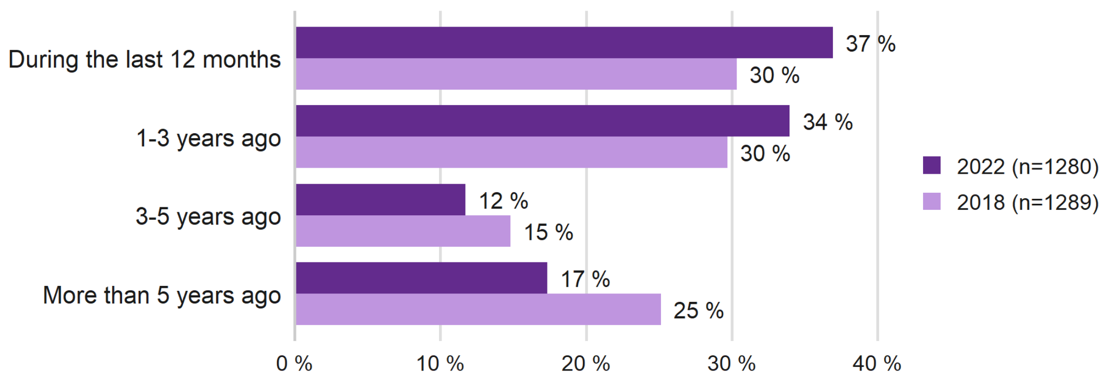
Eighty-five percent of the Norwegian respondents have (ever) signed a contract with an electricity supplier. 13 percent have never signed an electricity contract, while two percent are unsure.

There are no significant differences from 2018 to 2022.

- The share is higher among respondents who have a spot-price contract (90%), compared to those who have a variable-price contract (79%) or a fixed-price contract (85%).

Respondents who have signed a contract with an electricity supplier were asked when they last did this.

Figure 137: When did you last sign a new contract with an electricity supplier? Percent of respondents who have ever signed a contract.



Thirty-seven percent of the respondents who have signed a contract did so less than one year ago and are considered *active* customers. 34 percent signed a contract 1–3 years ago, 12 percent signed a contract 3–5 years ago, and 17 percent signed a contract more than five years ago

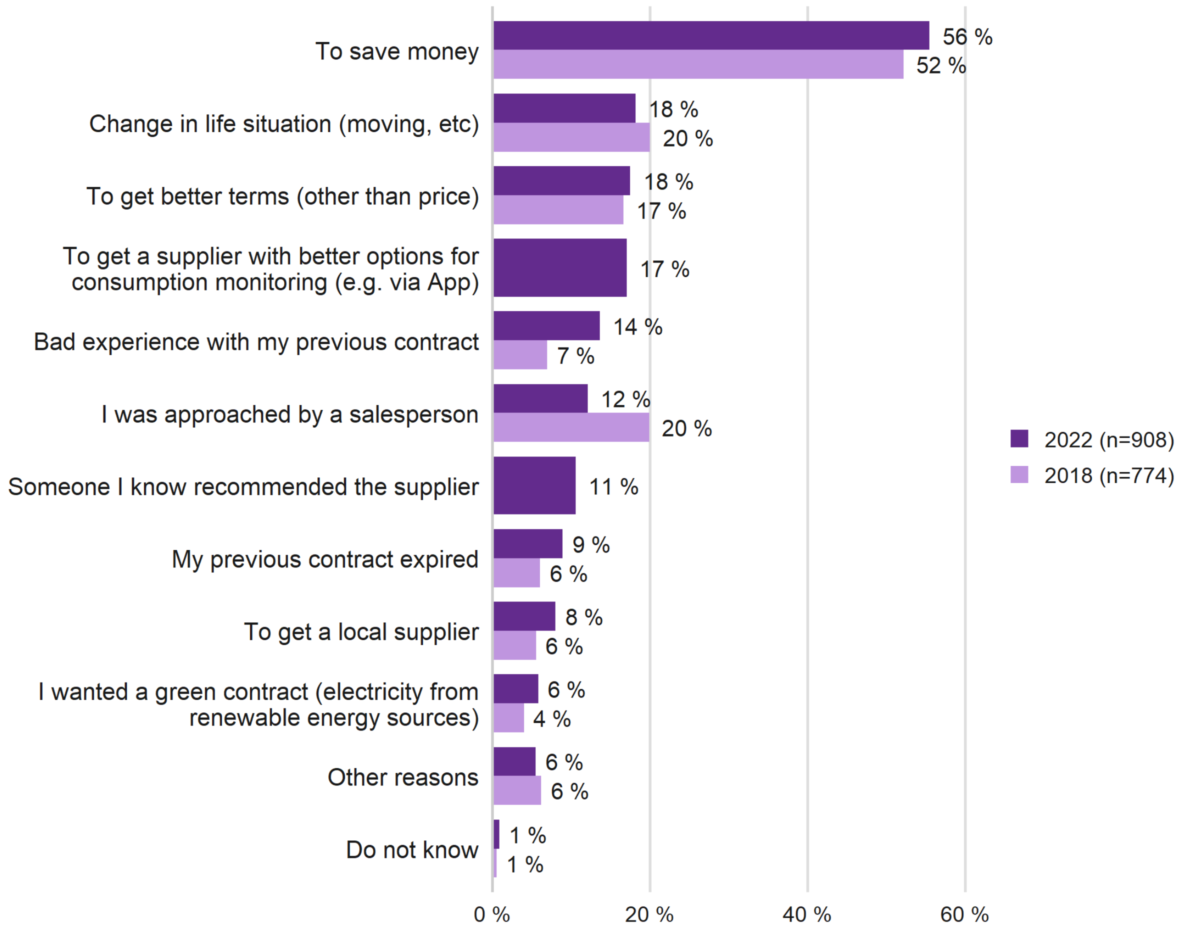
Compared to 2018, there is an increase in the share who signed a contract within the last year, and a decrease in the share who signed a contract more than five years ago.

- A higher share of respondents under 35 signed a contract a contract within the last year (45%), compared with respondents who are 35 years old or older (33–37%). Almost half of the respondents aged 50 or older last signed a contract more than 5 years ago, compared with 14 percent of those aged 35–49 and only five percent of those under 35.

- A larger share of respondents with fixed-price contracts signed a new contract within the past year (47%), compared to respondents with spot- (40%) or variable-price contracts (20%).

The electricity customers who have signed new contracts in the past three years were asked why they signed a new contract.

Figure 138: Why did you sign a new electricity contract? Multiple answers possible. Respondents who signed a contract in the past three years.



More than half of the Norwegian electricity customers say that they signed a new contract to save money (56%). This was also the most common reason for signing a new electricity contract in 2018.

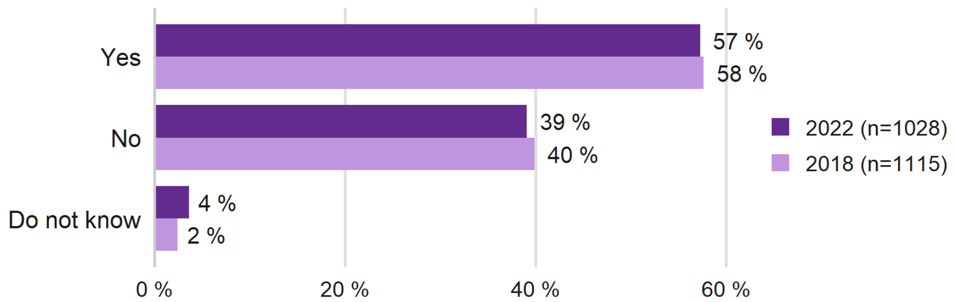
Eighteen percent signed the contract due to a change in their life situation and/or because they wanted to get better terms (other than price). 17 percent signed a new contract to get better options for consumption monitoring, and 14 percent due to a bad experience with their previous contract, while 12 percent were approached by a salesperson. Between six and 11 percent say that they signed a new contract because someone recommended the supplier, because their previous contract expired, to get a local supplier, or because they wanted a green contract. Six percent cite other reasons, and one percent are unsure.

Compared to 2018, a lower share were approached by a salesperson (12%; down from 20%), while a higher share say that they signed a new contract due to a bad experience with their previous contract (14%; up from 7%).

- It is more common to have signed the new contract due to a change in life situation among younger respondents (ranging from 30 % among those under 35 to 9% among those who are 65 or older). More of the younger respondents also signed the new contract because someone recommended the supplier (19% of respondents under 35), compared to older respondents (12% of respondents 35–49 and 4–6% of those who are 50 or older). On the other hand, a lower share of respondents under 35 signed a new contract to save money (48%), compared to older respondents (55–63%).
- A higher share of the respondents living in houses signed a new contract to save money (62%), compared to respondents who live in apartments (49%). Fewer of those living in houses signed a new contract due to a change in their life situation (13%), compared with apartment-dwellers (24%).
- A higher share of *active* customers signed the new contract to save money (63%), compared to *inactive* (45%) and *aware* customers (50%). Further, a higher share of *inactive* customers signed the new contract because they were approached by a salesperson (19%), compared to *active* (9%) and *aware* customers (12%). Higher shares of the *aware* customers signed the new contract because they wanted a green contract (12%) and/or to get better terms (25%), compared to *active* customers (3% and 15%, respectively) and *inactive* customers (6% and 15%, respectively).
- A lower share of respondents living in Northern Norway signed the new contract to save money (41%), compared to those living in other parts of Norway (52–63%).

Respondents who are not considered to be active (switched contract in past year) were asked if they have *compared* their current contract to other contracts.

Figure 139: Have you ever compared your current electricity contract to other contracts? Percent of respondents who have not signed a contract in the past 12 months (aware and inactive customers).

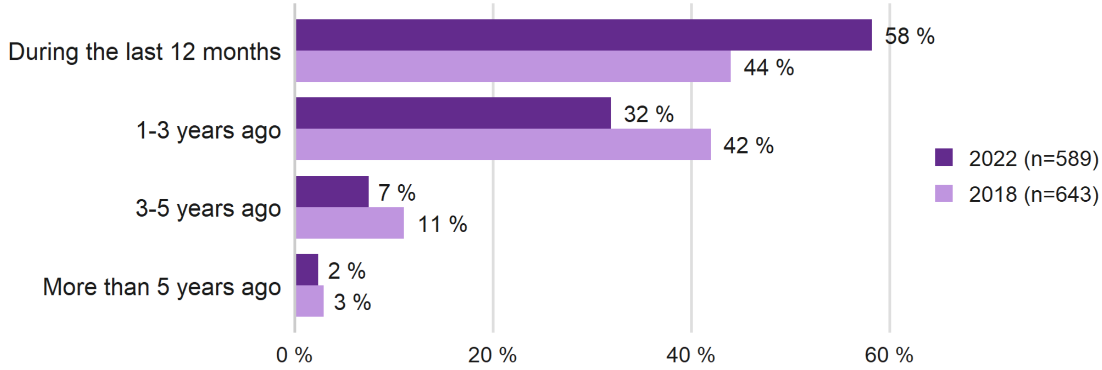


Fifty-seven percent of the *aware* and *inactive* Norwegian customers have compared their current electricity contract to other contracts. 39 percent have never made such a comparison.

There are no significant differences between 2018 and 2022.

Electricity customers who have compared their own contracts with others were asked when they most recently did this.

Figure 140: When did you last compare your current electricity contract to other contracts? Percent of respondents who have ever compared contracts.



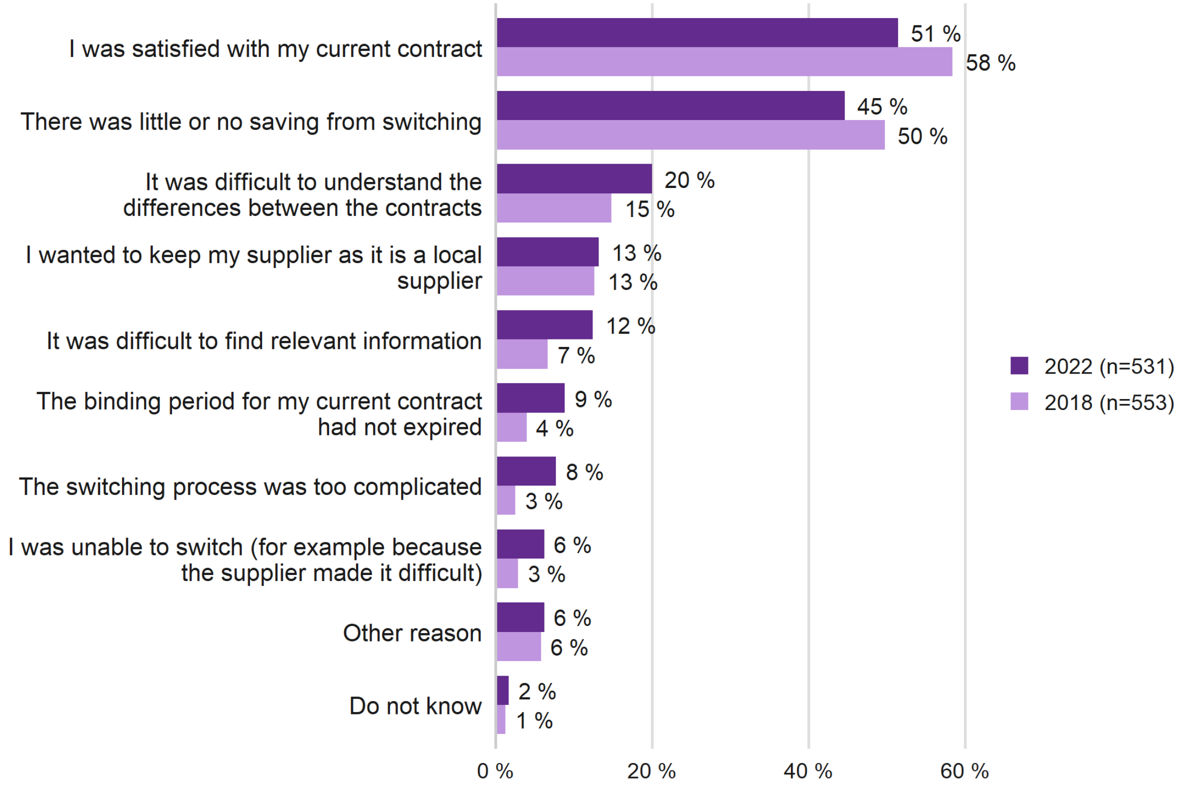
Fifty-eight percent of the *aware* and *inactive* respondents who have compared their current contract to other contracts did so during the last 12 months. 32 percent compared contracts 1–3 years ago, seven percent did so 3–5 years ago, and two percent compared contracts more than five years ago.

Compared with 2018, a larger share had compared their contract during the last 12 months (58%; up from 32%), while a smaller share did so 1–3 years ago (32%; down from 42%).

There are no significant differences between subgroups.

Those who have compared contracts during the last three years, and who have not switched, were asked why they chose to keep their current contract.

Figure 141: You have compared different offers but decided to stay in your current contract. Why? Multiple answers possible. Percent of respondents who have compared contracts in the past three years but not switched.



Fifty-one percent of the *aware* and *inactive* customers who have compared their current contract to other contracts but did not switch say that they chose to stay with their current contract because they were satisfied with it. 45 percent say that there was little or no saving from switching.

Twenty percent say that it was difficult to understand the differences between contracts, 13 percent wanted to keep their supplier as it is a local supplier, and 12 percent respond that it was difficult to find relevant information. It was less common to stay in the current contract because the binding period had not expired (9%), because the switching process was too complicated (8%), or because they were unable to switch (6%). Six percent cite other reasons for deciding to stay in the current contract, and two percent are unsure.

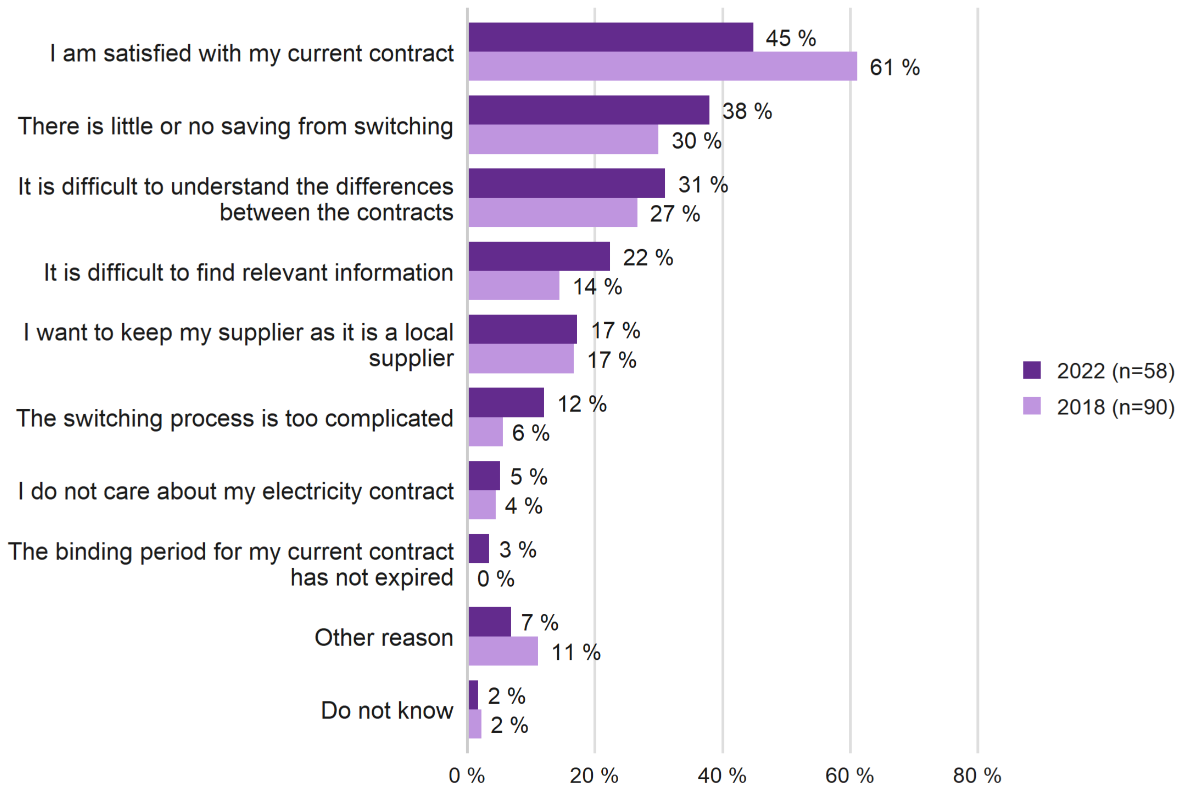
Compared to 2018, higher shares chose to stay in their current contract because the switching process was too complicated (8%; up from 3%), because it was difficult to find relevant information (12%; up from 7%), and because the binding period had not expired (9%; up from 4%).

- There is an inverse relationship between age and the share who say that they chose to stay in their current contract because they were unable to switch (from 15% of those under 35 to 1% of those aged 50 or older), that the switching process was too complicated (from 13% of those under 35 to 2% of those aged 65 or older), and that it was difficult to find relevant information (from 19% to 5%).
- A higher share of respondents with a variable-price contract chose to stay in their current contract because the switching process was too complicated (17%), compared to respondents with a spot-price contract (3%) or a fixed-price contract (11%). Higher shares of respondents with a fixed-price contract stayed in their current contract because they were

unable to switch (15%) or because the binding period had not expired (23%), compared to respondents with a variable-price contract (12 % and 12%, respectively) or a spot-price contract (2% and 4%, respectively). A lower share of respondents with spot contracts stayed in their current contract because they wanted to keep their local supplier (9%), compared to respondents with fixed- (17%) or variable-price contracts (20%).

Those who have neither switched nor compared contracts in the past three years were asked why they had not done so more often.

Figure 142: Why have you not switched or compared contracts more often? Multiple answers possible. Percent of respondents who have neither signed a new contract nor compared contracts in the past three years.



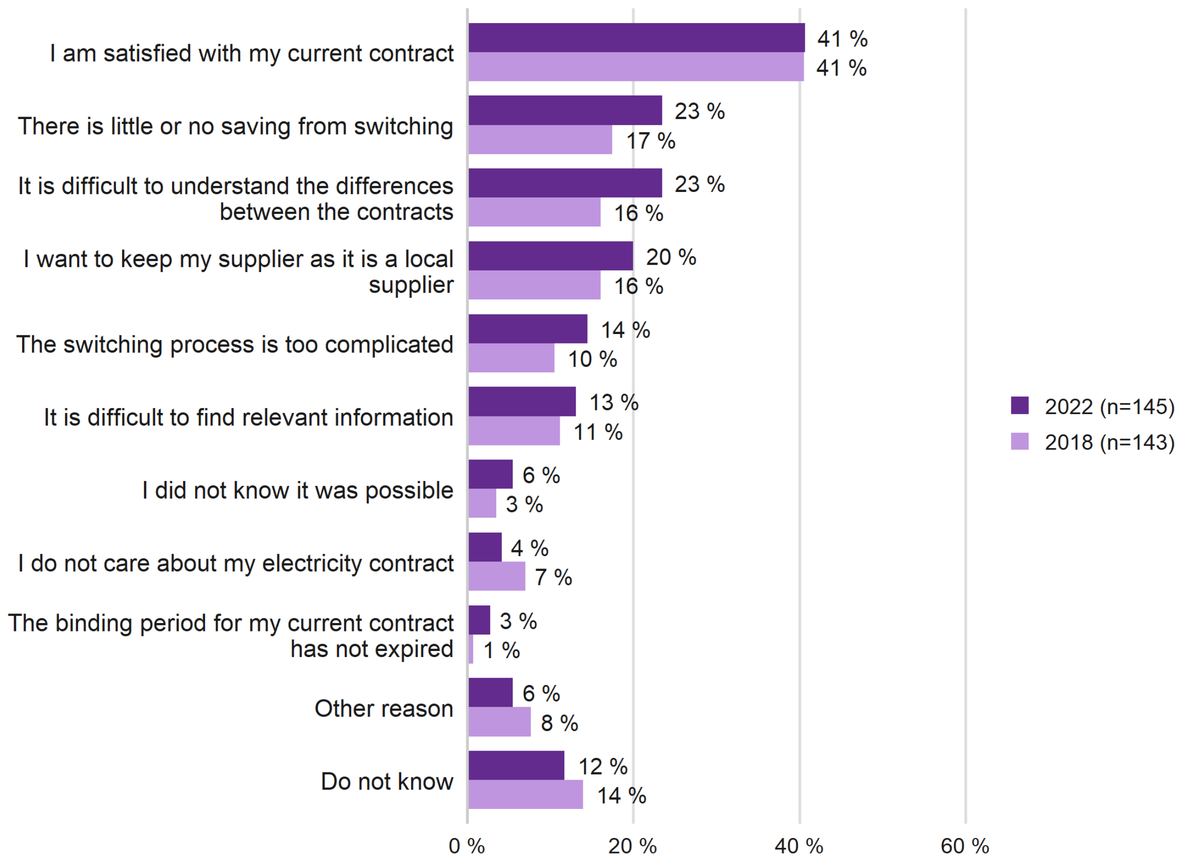
Forty-five percent say that they have not switched or compared more often because they are satisfied with their current contract. 38 percent say that there is little or no saving from switching, while 31 percent respond that it is difficult to understand the differences between contracts.

Twenty-two percent say that it is difficult to find relevant information, 17 percent want to keep their supplier as it is a local supplier, and 12 percent say that the switching process is too complicated. Five percent do not care about their electricity contract, while three percent say it is because the binding period of their current contract has not expired. Seven percent give other reasons for not switching or comparing contracts more often.

There are no significant changes from 2018 to 2022 and no significant differences between subgroups.

Those who had *never* switched or compared contracts were asked why they had never done this.

Figure 143: Why have you never switched or compared contracts? Multiple answers possible. Respondents who have never switched or compared contracts.



Four-in-ten answer that they have never switched or compared contracts because they are satisfied with their current contract. 23 percent say that there is little or no saving from switching, and just as many say that it is difficult to understand the differences between contracts (23%). Further, 20 percent want to keep their supplier as it is a local supplier, 14 percent say that the switching process is too complicated, and 13 percent say that it is difficult to find relevant information.

It is less common that respondents have never switched or compared contracts because they did not know that it was possible (6%), because they do not care about their electricity contract (4%), or due to the binding period of their current contract (3%). Six percent have other reasons for never switching or comparing contracts, and 12 percent do not know why they have never switched or compared contracts.

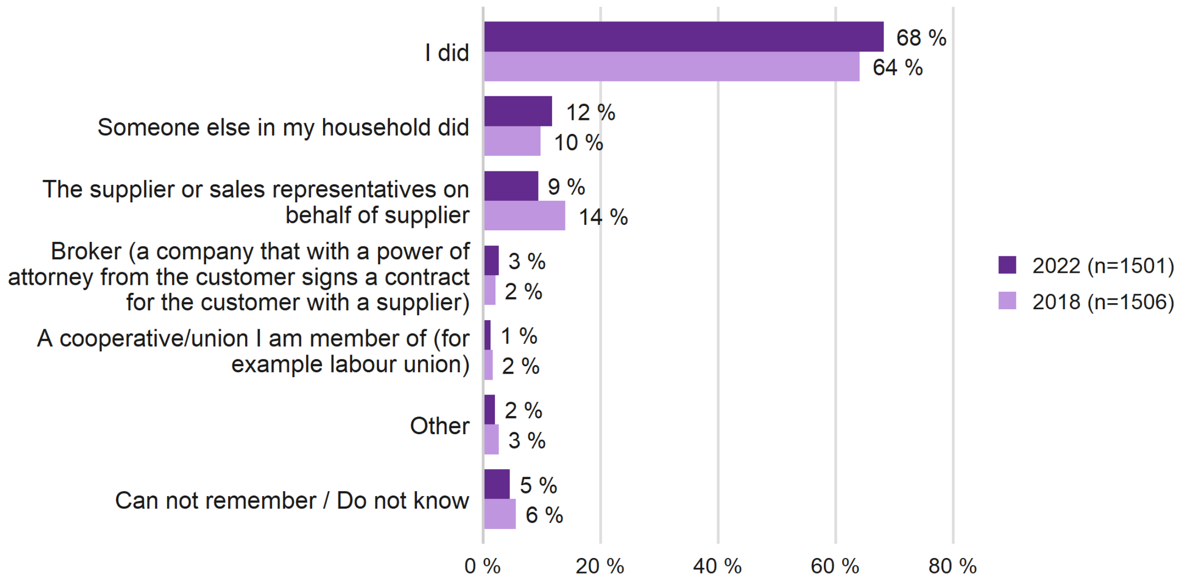
There are no significant changes from 2018 to 2022.

- A higher share of respondents who are at least 65 years old say that they want to keep their supplier as it is a local supplier (41%), compared to the younger respondents (0–17%).

The contract-signing process

The respondents were asked questions related to the signing process, including who initiated the signing of their current contract, how they chose a contract, how they were contacted, etc.

Figure 144: Who initiated the signing of your current contract?



Two-thirds of the Norwegian customers initiated the signing of their current contract themselves (68%). 12 percent say that someone else in their household initiated the signing.

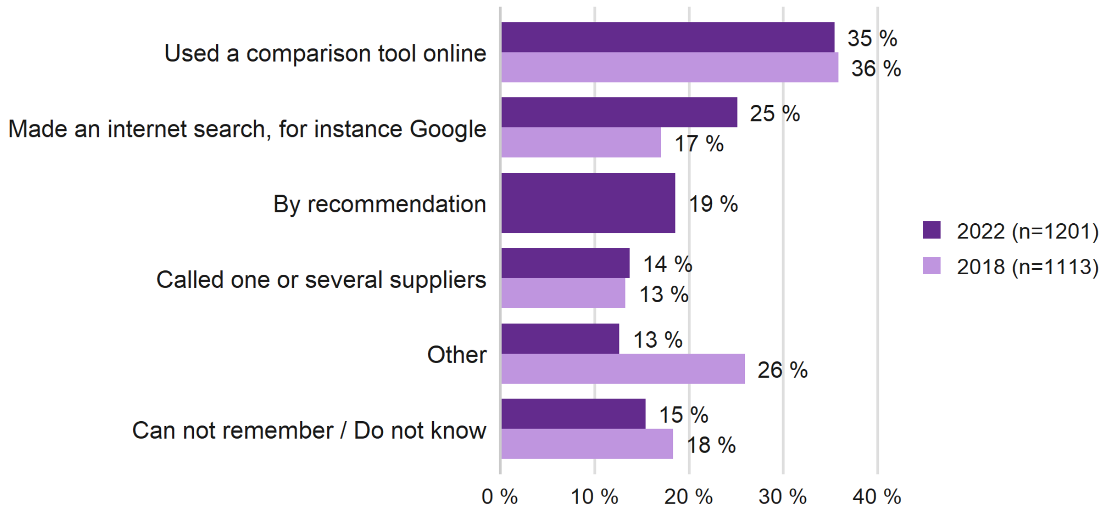
Nine percent report that the signing was initiated by the supplier, or by sales representatives on behalf of the supplier. It is less common that a broker (3%), a cooperative/union (1%), or other actors (2%) initiated the signing. Five percent are unsure.

Compared with 2018, fewer say that the signing was initiated by the supplier or its sales representatives (9%; down from 14%).

- A smaller share of respondents under 35 initiated the contract signing themselves (61%), compared to older respondents (65–74%). Further, somewhat more respondents under 50 years old say that a broker initiated the signing of the contract (4–5%), compared to those who are 50 or older (1%).
- A larger share of respondents living in houses say that someone else in their household initiated the signing (16%), compared to respondents who live in apartments (8%).
- The share who initiated the signing of their current contract themselves is largest among respondents with a spot-price contract (76%) and smallest among those with a variable-price contract (54%). Further, a higher share of the respondents who have a variable-price contract respond that the signing was initiated by the supplier or its sales representatives (16%), compared to those who have a spot- (7%) or a fixed-price contract (9%).
- The share who initiated the signing of their current contract themselves is higher among *active* customers (81%) than among *aware* customers (69%) and *inactive* customers (59%).

Those electricity customers who responded that either they themselves or someone else in their household initiated the signing of their current contract were asked how they *chose* the contract.

Figure 145: How did you go about choosing electricity contract? Multiple answers possible. If signing initiated within own household.



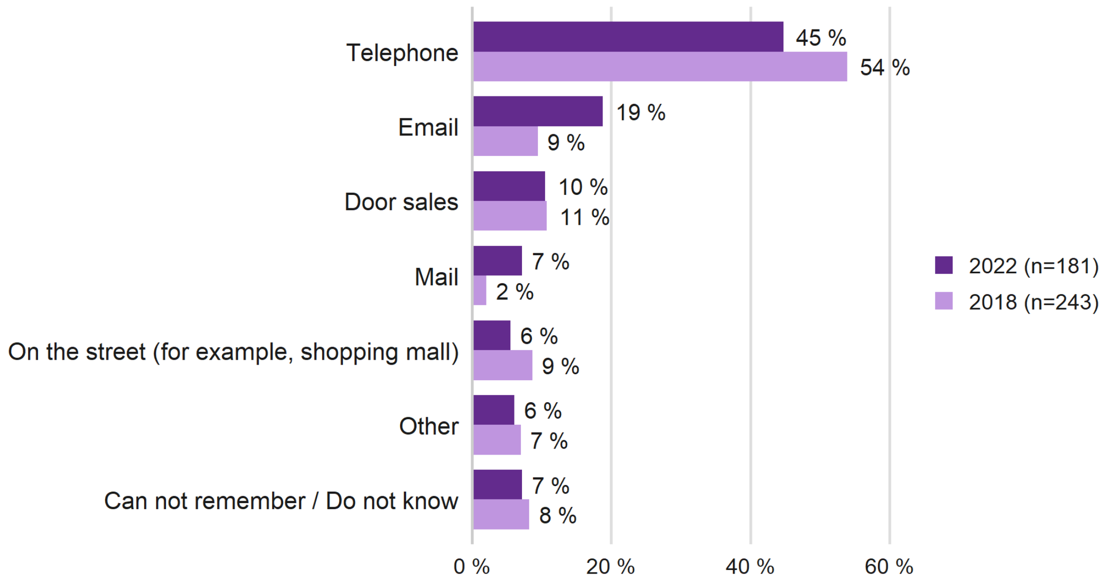
Thirty-five percent used a comparison tool online before they chose a contract, 25 percent did an internet search, and 19 percent made the choice after a recommendation from others. 14 percent called one or several suppliers, and 13 percent used other methods. 15 percent do not know or remember how the choice was made.

Compared to 2018, the share who did an internet search is somewhat higher (25%; up from 17%). The share who used other methods is lower (13%; down from 26%) – note that an extra alternative ("By recommendation") was added to the questionnaire in 2022.

- The share who used a comparison tool online is lower among those aged 65 or older (26%) than among the younger respondents (34–42%). The share who followed a recommendation is somewhat higher among those under 50 (20–25%) than among the older respondents (14–17%). A higher share of those aged 65 or older say that they do not know or remember how the choice was made (25%), compared to younger respondents (7–17%).
- The share who used a comparison tool online is highest in Eastern Norway (47%) and lowest in Northern Norway (23%) (the share is 32–38% in the other regions).
- *Active* (47%) and *aware* customers (40%) are more likely to have used an online comparison tool than *inactive* customers (24%). Moreover, higher shares of *active* (33%) and *aware* (27%) customers did an internet search, compared to *inactive* customers (18%). One-in-four *inactive* customers say that they do not know or remember how the choice was made (compared to 6% of *active* and 14% of *aware* customers).
- A higher share of those who have a fixed-price contract used an online comparison tool (45%), compared with those who have a variable- (31%) or spot-price contract (36%).

Those who responded that they were contacted by an electricity supplier or broker were asked *how* they were contacted by the supplier/broker.

Figure 146: How did they contact you? Percent of respondents who were contacted by a supplier or broker.

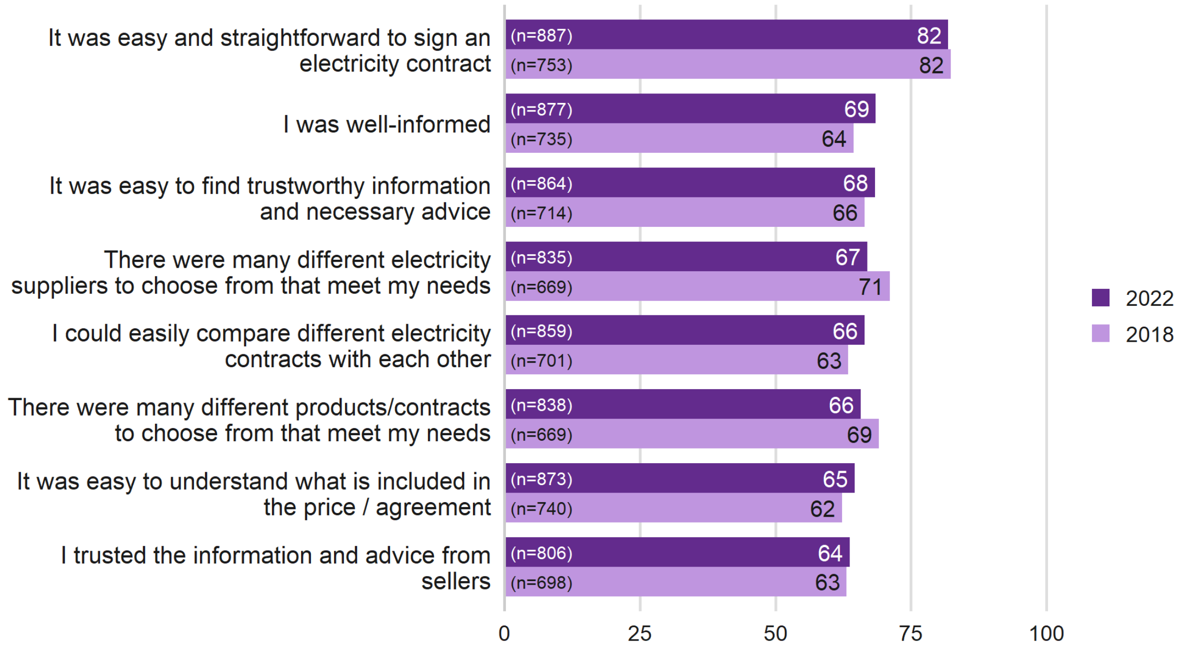


Forty-five percent of those who were contacted by an electricity supplier or broker were contacted by phone. 19 percent were contacted by email, 10 percent were contacted via door sales, seven percent were contacted by mail, and six percent were contacted on the street. Six percent stated other forms of contact. Seven percent do not know or remember how they were contacted.

There are no significant differences between 2018 and 2022.

Respondents who have signed a new contract in the past three years were asked to consider different statements related to this process.

Figure 147: Before you made your current choice of electricity contract, to what extent did you experience the following …? Average scores: 0=Not at all and 100=High extent. "Do not know" is excluded. Respondents who have signed a new contract in the past three years.



Norwegian customers who have signed a new contract in the past three years experienced to a high extent that it was easy and straightforward to sign an electricity contract (average score 82 out of 100). Further, they experienced to a moderate extent that: They were well-informed (69), it was easy to find trustworthy information and necessary advice (68), there were many different electricity suppliers to choose from that met their needs. (67), they could easily compare different electricity contracts with each other (66), there were many different products/contracts to choose from that met their needs (66), and it was easy to understand what is included in the price/agreement (65). They experienced to some extent that they trusted the information and advice from sellers (64).

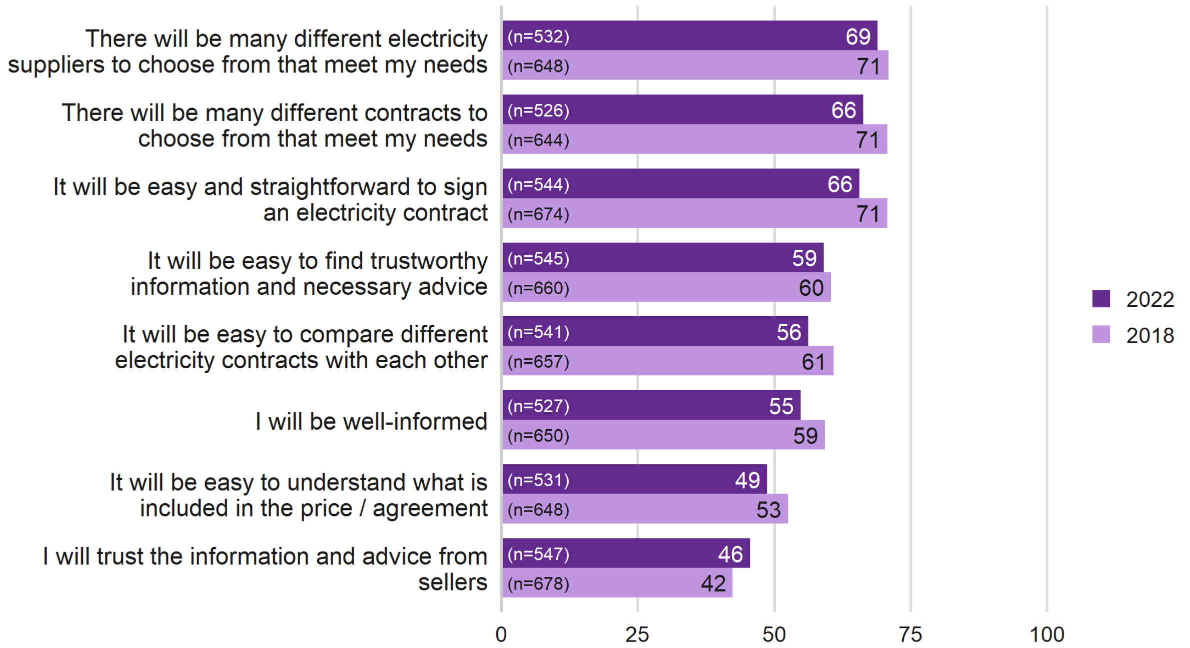
Compared with 2018, the respondents experienced to a somewhat lower extent that there were many different electricity suppliers to choose from that meet their needs (67 in 2022; down from 71 in 2018). They experienced to a somewhat *higher* extent that they were well-informed (69; up from 64).

- Older respondents experienced it as easier and more straightforward to sign an electricity contract than younger respondents did – the average score increases with age, from 79 among those under 35 to 87 among those 65 or older. On the other hand, respondents under 50 agree more strongly that they could easily compare different contracts to each other (average score 69), compared to those aged 50 or older (62-64).
- *Inactive* customers experienced to a lower extent that was easy to find trustworthy information and necessary advice (63), compared to the *active* and *aware* customers (both 70). They also experienced to a lower extent that they could easily compare different electricity contracts with each other (61, compared to 67-70), that it was easy to understand what is included in the price/agreement (59, compared to 65-68), and that they were well-informed (62, compared to 71-70).
- Compared to respondents who have a fixed- or a variable-price contract, respondents with a spot-price contract experienced to a *lower* extent that: It was easy to understand what is

included in the price/agreement (59, compared to 71 and 67), they could easily compare different electricity contracts with each other (65, compared to 73 and 67), they trusted the information and advice from the sellers (61, compared to 68 and 68), and they were well-informed (67, compared to 74 and 70).

Those who have *not* signed a new contract in the past three years were asked to consider different statements concerning a potential future choice of electricity contract.

Figure 148: If you in the future would like to choose an electricity contract, to what extent do you agree that… ? Average scores: 0=Not at all and 100=High extent. "Do not know" is excluded. Respondents who have not signed a new electricity contract in the past three years.



The customers who have *not* signed a new contract in the past three years agree to a moderate extent that if they are to choose an electricity contract in the future, there will be many different electricity suppliers (69) and contracts (66) to choose from that meet their needs, and it will be easy and straightforward to sign an electricity contract (66). They also agree somewhat that it will be easy to find trustworthy information and necessary advice (59), it will be easy to compare different electricity contracts (56), and they will be well-informed (55). They neither agree nor disagree that it will be easy to understand what is included in the price/agreement (49), while they somewhat *disagree* that they will trust the information and advice from sellers (46).

Compared to 2018, the respondents agree somewhat less that it will be easy and straightforward to sign an electricity contract (66; down from 71) and that there will be many different contracts to choose from that meet their needs (also 66; down from 71).

- There is an inverse relationship between age and the extent to which respondents agree/disagree that it will be easy to compare different electricity contracts with each other (ranging from 64 among those under 35 to 48 among those 65 or older), that they will trust the information and advice from sellers (from 57 to 39), and that it will be easy to understand what is included in the price/agreement (from 56 to 42).

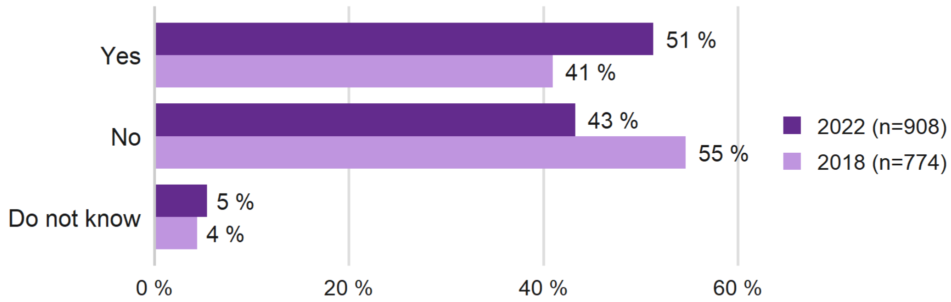
- Compared with respondents who have variable- or spot-price contracts, respondents with fixed-price contracts believe that it will be easier to find trustworthy information and necessary advice (69, compared to 60 and 56) and to understand what is included in the price/agreement (60, compared to 47 and 46), and they have more faith that they will be well-informed (65, compared to 54 and 53). Respondents who have a spot-price contract tend to disagree more strongly that they will trust information and advice from sellers (41), compared to respondents with a variable- (50) or fixed-price contract (55).

Comparison tools

The respondents were also asked to consider different questions on price comparison tools.

The electricity customers who have signed a contract in the past three years were asked if they had visited an online comparison tool.

Figure 149: When you signed/compared your current electricity contract, did you visit an online comparison tool? Respondents who have signed a new contract in the past three years.



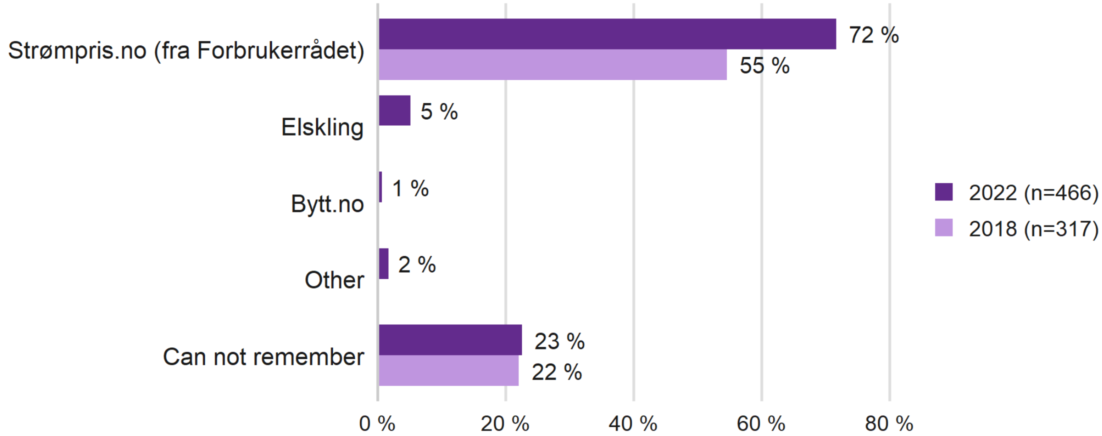
Fifty-one percent of the Norwegian customers who have signed a new contract in the past three years visited an online comparison tool when they signed/compared their current contract. 43 percent did not.

Compared to 2018, a higher share of the 2022 respondents visited an online comparison tool (up from 41% to 51%).

- There is an inverse relationship between age and having visited an online comparison tool (ranging from 60% of respondents under 35 to 42% of those aged 65 or older).
- Respondents who live in Northern Norway are less likely to have visited an online comparison tool (35%), compared to respondents in other parts of Norway (49–58%).
- More respondents with a fixed-price contract used an online comparison tool (64%) than those with a variable- or a spot-price contract (57% and 48%, respectively).
- The *aware* customers used online comparison tools to a greater extent (66%) than *active* customers (53%) and *inactive* customers (32%).

Those who had visited one or more online comparison tools were asked to name the comparison tool(s).

Figure 150: What comparison tool(s) did you visit? Multiple answers possible. Respondents who visited a comparison tool when they signed their current contract.

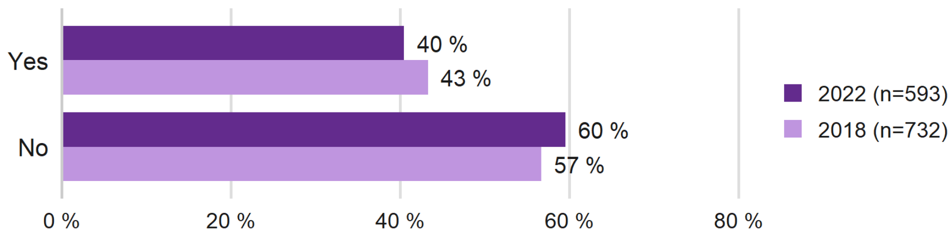


Seventy-two percent of those who had visited an online comparison tool used "Strømpris.no", which is a price comparison tool (for electricity) managed by the Norwegian Consumer Council. Between one and five percent named other online comparison tools, and 23 percent respond that they cannot remember.

A higher share had visited "Strømpris.no" in 2022 than in 2018.[28]

Those who have *not* signed a contract in the past three years were also asked about comparison tools.

Figure 151: Do you know of any online comparison tools for electricity contracts? Respondents who have not signed a new contract in the past three years.



Four-in-ten respondents who have not signed a contract in the past three years *know of* at least one online comparison tool. Six-in-ten do not know of any online comparison tools.

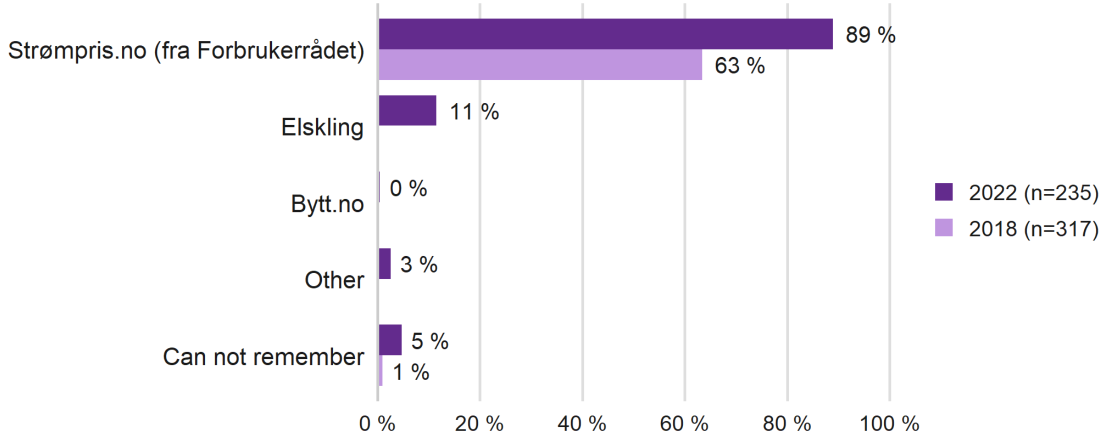
There are no significant differences between 2018 and 2022.

- The share is higher among *aware* customers (67%) than among *inactive* customers (33%).

Those who know of online comparison tools for electricity contracts were asked which online comparison tools they had *visited*.

[28] Note that "Elskling" was a predefined response category in 2018 but not in 2022.

Figure 152: What comparison tool(s) have you visited online? Multiple answers possible. Respondents who have not signed a new contract in the past three years and who say they know of an online comparison tool.



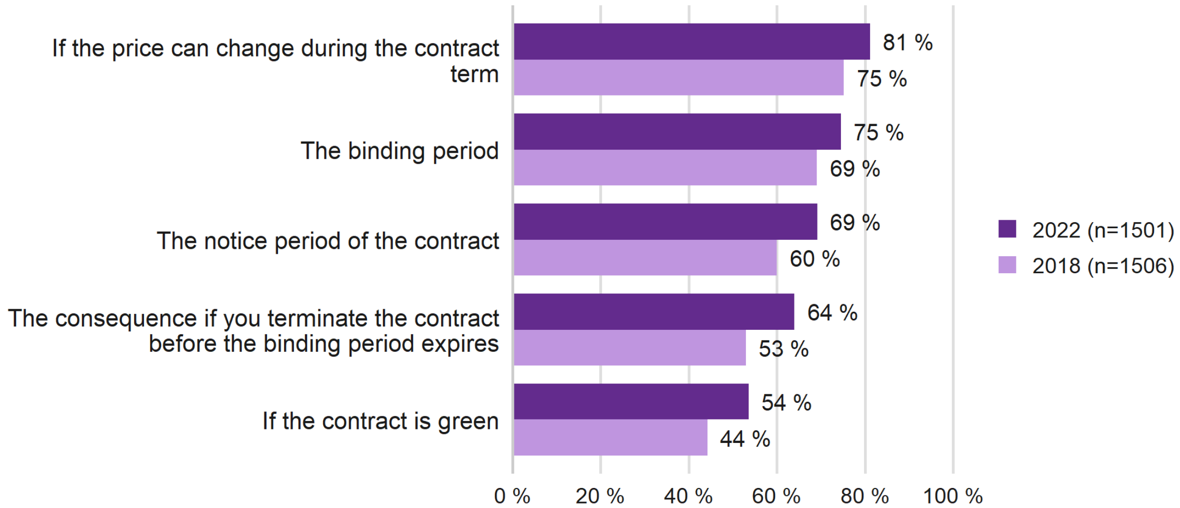
Eighty-nine percent have visited “Strømpris.no”, 11 percent have visited Elskling, and three percent have visited other comparison tools. Five percent cannot remember.

The share who have visited “Strømpris.no” is higher than in 2018.[29]

Terms of contract

The respondents were asked questions about their current contract and how well they know the terms of the contract.

Figure 153: When you think of your current electricity contract, are you aware of ...? Shares who answered “Yes”.



Eight-in-ten say that they are aware of whether the price can change during the contract term. The majority also respond that they are aware of the binding period (75%), the notice period of the contract (69%), and the consequence of terminating the contract before the binding period expires (64%). A small majority say that they are aware of whether the contract is green (54%).

Compared to 2018, more respondents now say that they are aware of whether the price can change during the contract term (81%; up from 75%), the binding period (75%; up from 69), the notice

[29] Note that “Elskling” was a predefined response category in 2018 but not in 2022.

period of the contract (69%; up from 60%), the consequence of terminating the contract before the binding period expires (64%; up from 53%), and whether the contract is green (54%; up from 44%).

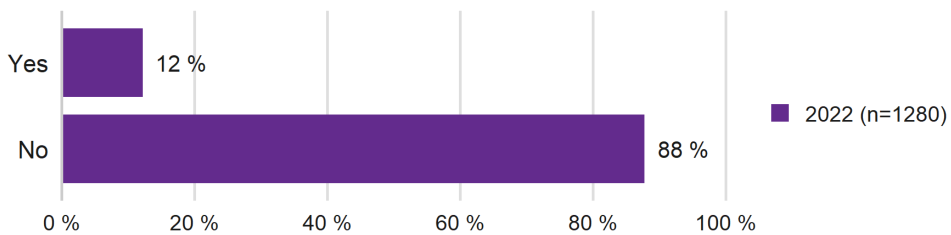
- More respondents under 35 say they are aware of whether the contract is green (63%), compared to older respondents (48–55%).
- A higher share of the respondents who have a spot-price contract say that they are aware of whether the price can change during the contract term (86%), compared to those who have a fixed- (73%) or a variable-price contract (81%). Compared to the respondents who have a variable- or a spot-price contract, a higher share of those who have a fixed-price contract say that they are aware of the binding period (85%, compared to 66% and 76%) and the consequence of terminating the contract before the binding period expires (73%, compared to 57% and 67%). A lower share of those who have a variable-price contract say that they are aware of the notice period (62%), compared to those who have a fixed-price contract (76%) or a spot-price contract (73%).
- *Inactive* customers are generally less aware of the terms of their current electricity contract than *active* and *aware* customers are.

Negative experiences and complaints

In 2022, the survey also included a section exploring customers' bad experiences in the electricity market.

Respondents who had ever signed a contract were asked if they had experienced problems with their new supplier after signing their current contract and whether they made a complaint regarding their problem.

Figure 154: After you signed your current contract, did you experience problems with your new electricity supplier? Respondents who have ever signed a contract.

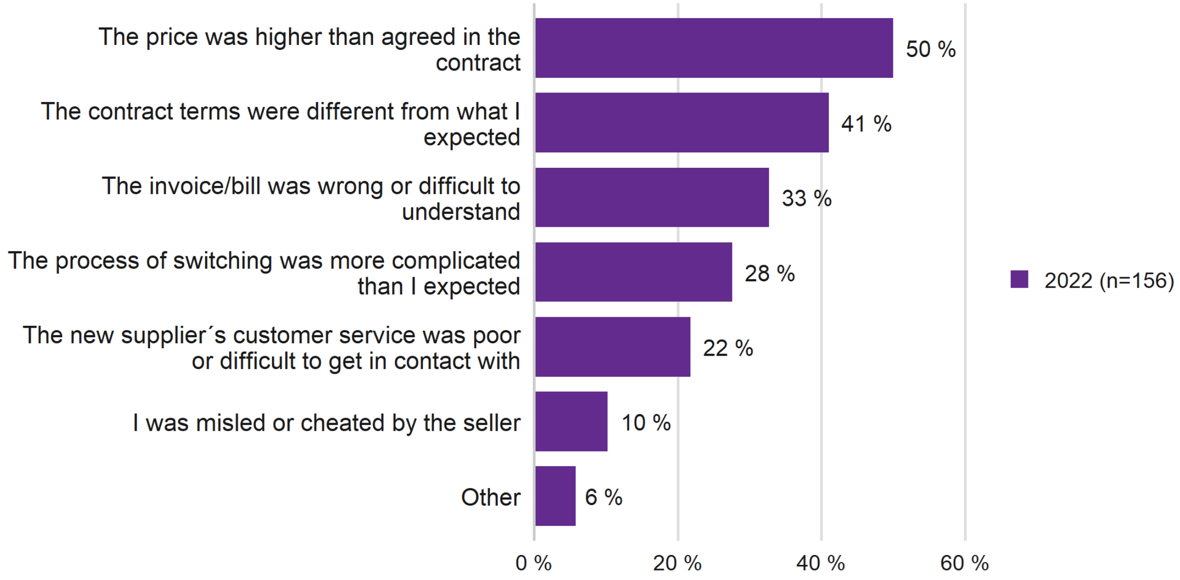


Twelve percent of the Norwegian customers have experienced problems with their new electricity supplier.

- There is an inverse relationship between age and having experienced problems with the new electricity provider (ranging from 26% of those under 35 to 6% of those aged 65 or older).
- A lower share of respondents with a spot contract say that they have experienced problems (7%), compared with those who have a fixed- (21%) or a variable-price contract (22%).
- A lower share of *inactive* customers have experienced problems (9%), compared with *active* (12%) and *aware* customers (18%).
- It is less common to have experienced problems among respondents who live in Northern Norway (5%) than among those who live elsewhere in Norway (10–17%).

Those who have experienced problems with their new electricity supplier were asked what kind of problem(s) they experienced.

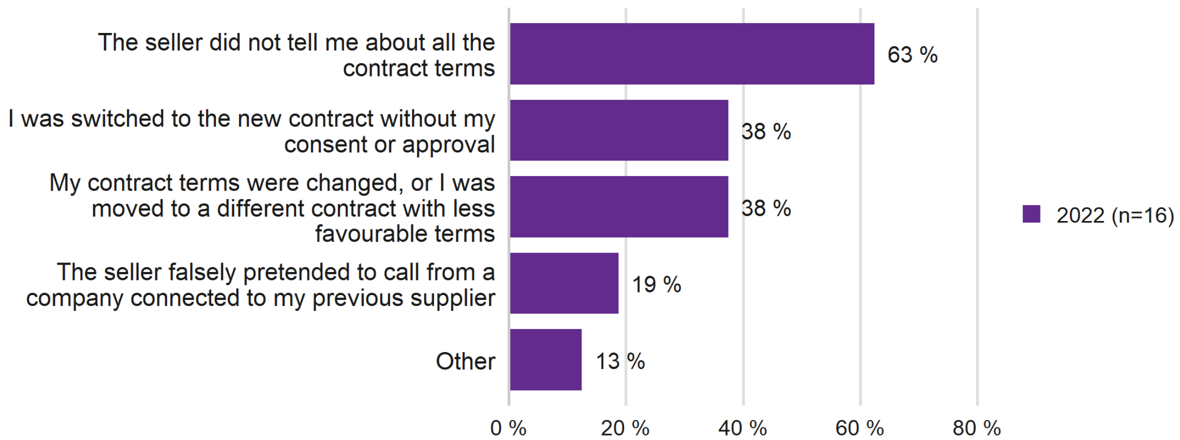
Figure 155: What kind of problem did you experience? Multiple answers possible. Respondents who experienced problems with their new electricity supplier.



Half of those who experienced problems with their new supplier say that the price was higher than agreed in the contract. 41 percent say that the contract terms were different from what they expected, 33 percent say that the invoice/bill was wrong or difficult to understand, and 28 percent say that the switching process was more complicated than they expected. 22 percent respond that the new supplier's customer service was poor or difficult to get in contact with, 10 percent say that they were misled or cheated by the seller, and six percent experienced other problems.

Those who responded that they were misled or cheated by the seller were given a follow-up question about how they were misled or cheated.

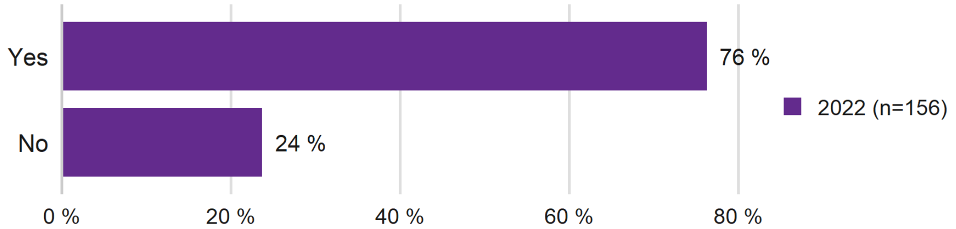
Figure 156 In what way were you misled or cheated by the seller? Multiple answers possible. Respondents who were misled or cheated by the seller.



The majority of those who were misled or cheated by the seller say that the seller did not tell them about all the contract terms. Many also say that they were switched to the new contract without their consent/approval, or that their contract was changed, or they were moved to a different contract with less favorable terms. Fewer report that the seller pretended to call from a company related to the previous supplier, or that they were misled or cheated by the seller in other ways. **Note that only 16 respondents were asked this question**.

Those who had experienced problems with their new electricity supplier were also asked whether they had made a complaint.

Figure 157: Did you make a complaint regarding your problem? Respondents who experienced problems with their new electricity supplier.

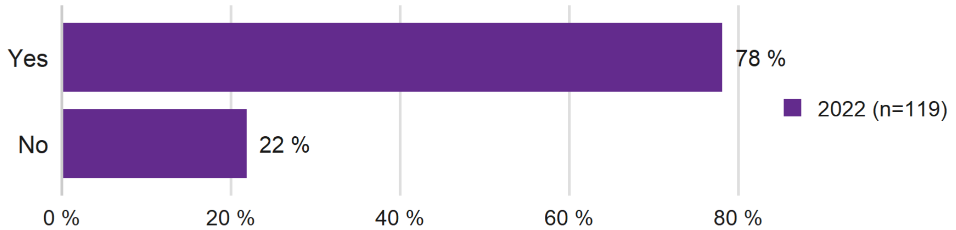


Seventy-six percent of those who experienced problems with their new contract made a complaint regarding the problem.

- A higher share of respondents under 35 made a complaint (91%), compared with older respondents (60–73%).

Those who made a complaint were asked whether the problem got fixed due to the complaint – and how satisfied they were with the outcome.

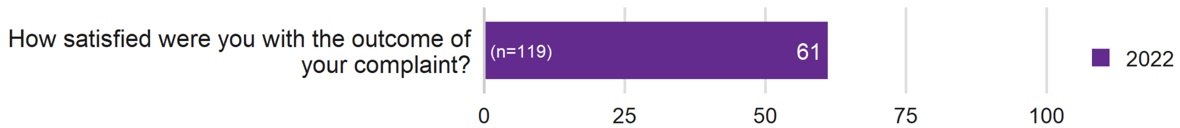
Figure 158: Did your problem get fixed due to your complaint? Respondents who experienced problems with their new electricity supplier and who complained.



Seventy-eight percent respond that the problem got fixed due to their complaint.

- A higher share of those who have a fixed-price contract (95%) or a variable-price contract (88%) respond that the problem got fixed due to their complaint, compared to those who have a spot-price contract (62%).

Figure 159: How satisfied were you with the outcome of your complaint? Average scores: 0=Very dissatisfied and 100=Very satisfied. "Do not know" is excluded. Respondents who experienced problems with their new electricity supplier and who complained.



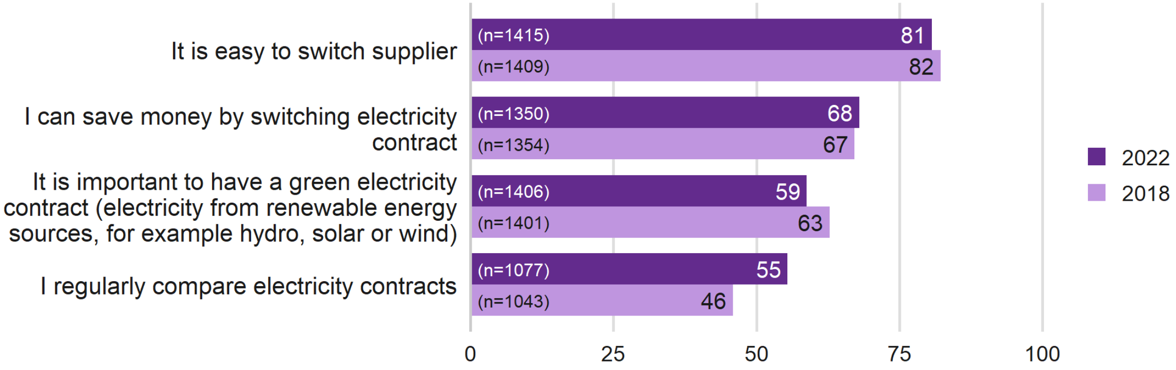
When it comes to satisfaction with the outcome of the complaint, the results show that the respondents, on average, were somewhat satisfied (average score of 61 of 100). 54 percent say that they were satisfied, while 24 percent say that they were dissatisfied.

- On average, those who have a fixed-price contract were more satisfied with the outcome (73), compared to those who have a variable- (59) or a spot-price contract (55).

The Norwegian customers' attitudes towards the electricity market

The respondents were asked to consider different statements concerning the electricity market.

Figure 160: To what extent do you agree with the following statements …? Average score: 0=Fully disagree and 100=Fully agree. "Do not know" is excluded. Respondents who had not compared their current contract were not asked whether they regularly compare electricity contracts.



The Norwegian respondents broadly agree that it is easy to switch supplier (81), and they moderately agree that they can save money by switching electricity contract (68). Further, they tend to agree that it is important to have a green energy contract (59), and that they regularly compare contracts (55).

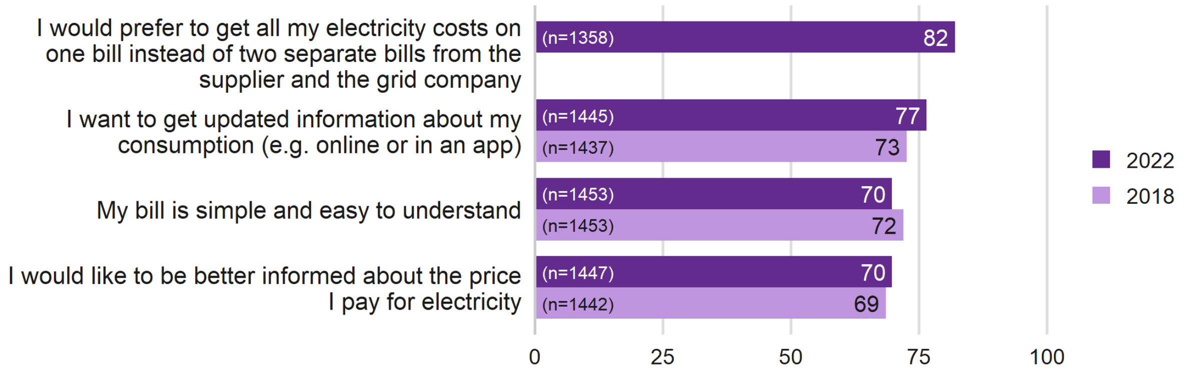
Compared to 2018, there is a noteworthy increase for "I regularly compare electricity contracts" – from a score indicating disagreement (46) to a score tending toward agreement (55). Moreover, respondents now agree to a somewhat *lower* extent that it is important to have a green electricity contract in (59 in 2022; down from 63 in 2018).

- On average, respondents who are 65 or older tend to agree less that they can save money by switching contracts than younger respondents do (scores are 59 among those 65 or older and 68–71 among the younger respondents). Younger respondents tend to agree more that it is important to have a green electricity contract (the average score declines from 65 among those under 35 to 55 among those who are 50 or older).
- *Active* (88) and *aware* (83) customers agree more strongly that it is easy to switch supplier than *inactive* customers do (74). Moreover, *active* customers broadly agree that they can save money by switching contracts (79), while *aware* (67) and *inactive* (60) customers agree to lesser extents. Finally, the *aware* (61) and *active* (60) customers tend to agree that they regularly compare contracts, while the *inactive* customers mostly disagree (41).
- Respondents who use 20,000 kWh or more per year agree more strongly than those with a lower consumption that they can save money by switching contracts (77, compared with 63–69). They also agree more that they regularly compare contracts (65, compared with 56–58).
- Those who live in an apartment tend to agree somewhat more that it is important to have a green electricity contract (61), compared with those who live in a house (56).

Billing and information

The respondents were asked to consider different statements concerning billing and information.

Figure 161: To what extent do you agree with the following statements ...? Average score: 0=Fully disagree and 100=Fully agree. "Do not know" is excluded.



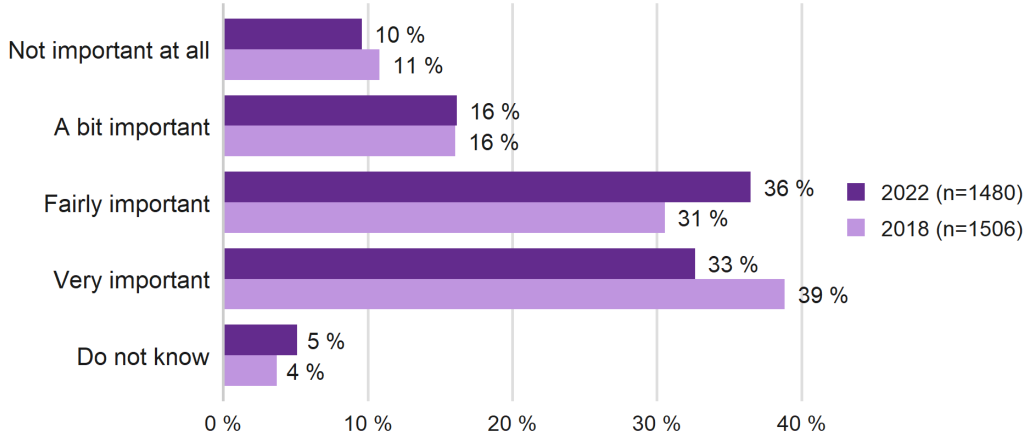
The Norwegian respondents mostly agree that they would prefer to get all their electricity costs on one bill instead of getting two separate bills from the supplier and the network company (82), and that they want to get updated information about their consumption (77). They also agree to a fairly high extent that their bill is simple and easy to understand (70) and that they would like better information about the price they pay for electricity (70).

The respondents agree somewhat more strongly that they want to get updated information about their consumption (e.g., online or in an app) in 2022 (77) than they did in 2018 (73).

- Younger respondents agree somewhat more strongly than older respondents that they would like to be better informed about the price they pay for their electricity (the average score ranges from 73 among those under 35 to 66 among those aged 65 or older).
- Respondents who receive their bills electronically agree more strongly than respondents who receive paper bills that they would prefer to get all electricity cost on one bill instead of two separate bills (83, compared to 71) and that they want to get updated information about their consumption (e.g., online or in an app) (77, compared to 67).
- *Inactive* customers agree to a lower extent than *active* and *aware* customers that their bill is simple and easy to understand (66, compared to 74 and 71), and that they want to get updated information about their consumption (72, compared to 80 and 80).
- Respondents who use 10,000 kWh or more per year agree more strongly that they would like to be better informed about the price they pay for electricity, compared with those who have a lower annual kWh usage (71–74, compared with 64–67).

The Norwegian respondents were asked a separate question about the importance of having all electricity costs on the same bill – instead of getting separate bills from the supplier and the grid company.

Figure 162: If you should switch supplier, how important would it be to get all electricity costs on one bill instead of two separate bills from the supplier and the grid company?



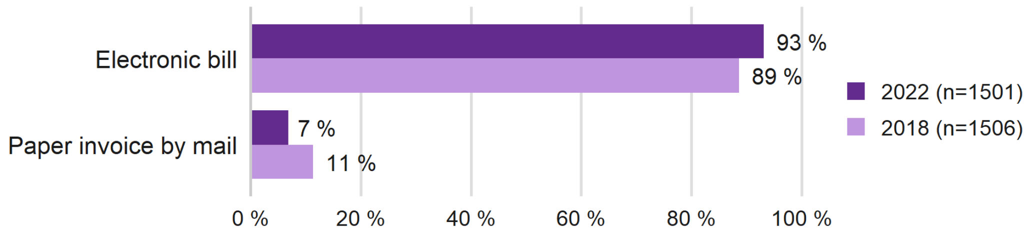
Sixty-nine percent say that of they were to switch supplier, it would be *fairly* or *very important* to get all electricity costs on one bill instead of on two separate bills. 26 percent say that it would be *a bit important* or *not important at all*.

Compared with 2018, fewer respondents say that it is *very* important to get all electricity cost on one bill instead of two separate bills (33%; down from 39%), while more say that this is *fairly* important (36%; up from 31%).

- A larger share of those who receive paper bills say that it would be very important to get all their electricity costs on one bill (49%), compared with respondents who receive their bill electronically (31%).
- More *active* customers say that it is not important at all to get all electricity costs on one bill (13%), compared with *aware* (9%) and *inactive* (7%) customers.

The respondents were also asked different questions about the electricity bill; about how they receive it; and what information they read on the bill.

Figure 163: How do you receive your electricity bill?

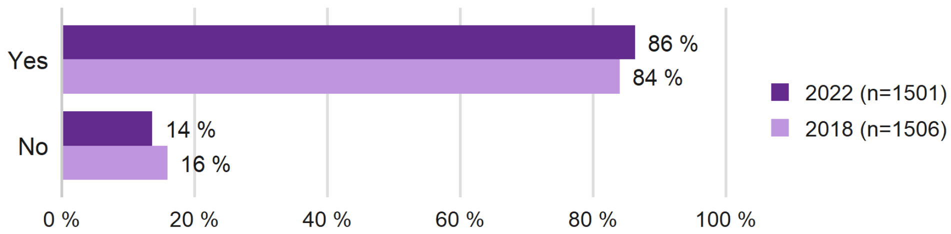


Almost all the Norwegian respondents receive their electricity bills electronically (93%). Seven percent receive a paper invoice by mail.

Compared to 2018, more customers receive their bills electronically (93%; up from 89%).

- There is an association between age and the share who receive their bill electronically, ranging from 87 percent among respondents under 35 to 96 percent among those who are 65 or older.
- More customers with a spot contract receive their bills electronically (97%), compared with those who have variable price (85%). 92 percent of those who have a fixed-price contract receive electronic bills.

Figure 164: Do you read the information presented on your electricity bill?



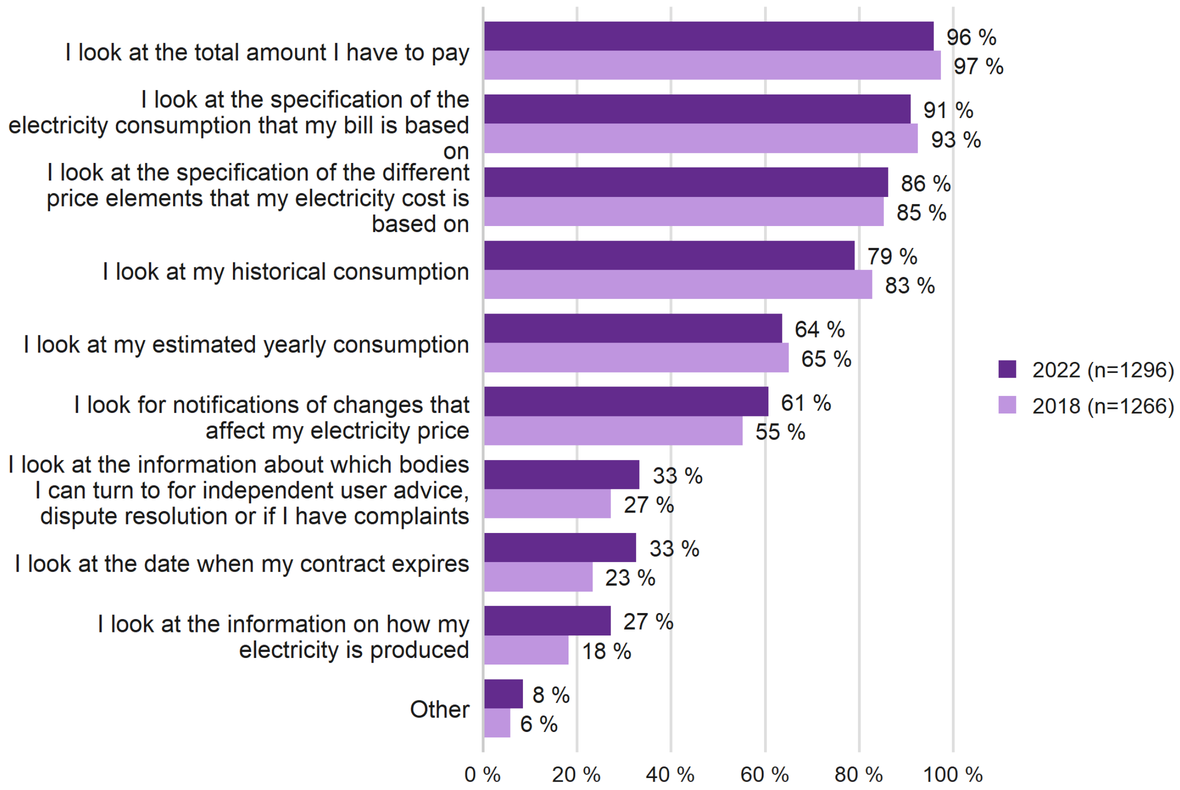
Eighty-six percent of the Norwegian customers read the information presented on their electricity bill.

There are no significant differences between 2018 and 2022.

- Somewhat more of the older respondents say they read the information presented on their bill, compared with younger respondents (the share ranges from 83% among those under 35 to 91% among those aged 65 or older).
- The share is lower among respondents who live in Northern Norway (77%), compared to those who live in other parts of Norway (86–89%).
- A lower share of *inactive* customers read the information presented on their bill (80%), compared with *active* (93%) and *aware* customers (91%).

The electricity customers who said that they read the information presented on the electricity bill were asked which items of this information they read.

Figure 165: What information do you read on your electricity bill? Respondents who say they read their bill. Shares who answer, "Yes".



Almost all the Norwegian customers who read their electricity bill look at the total amount they are due (96%) and at the specification of the electricity consumption on which their bill is based (91%). The vast majority also look at the specification of different price elements (86%) and their historical consumption (79%). Most look at their estimated yearly consumption (64%) and look for notifications of changes that affect their electricity price (61%).

It is less common to look at information about bodies to turn to for independent advice, dispute resolution, or complaints/the contract expiration date (both 33%) and information on how the electricity is produced (27%). Eight percent say they look at other information on their bill.

Compared to 2018, higher shares look at information about the contract's expiration date (33 %; up from 23%) and on how the electricity is produced (27%; up from 18%), look for notifications of changes that affect their electricity price (61%; up from 55%), and look for information about where to turn for independent advice, dispute resolution, or complaints (33%; up from 27%).

- Respondents under 35 generally read fewer items of information on their bills.
  - There is an association between age and the shares who read: Information about the total payable amount (from 92% among those under 35 to 98% of those aged 65 or older), specification of different price elements (from 77% to 90%), specification of consumption (from 85% to 96%), and estimated yearly consumption (from 58% to 69%). Respondents under 35 are also less inclined to look at information about their historical consumption (69%), compared to older respondents (78–85%).
  - On the other hand, respondents under 50 more often read information about the expiration date (39–40%), compared to older customers (24–27%). They are also more inclined to read information on how the electricity is produced (34–36% among

respondents under 50, compared to 16–22% among respondents who are 50 years or older), and on where to turn for independent user advice, etc. (39–40%, compared to 27%).

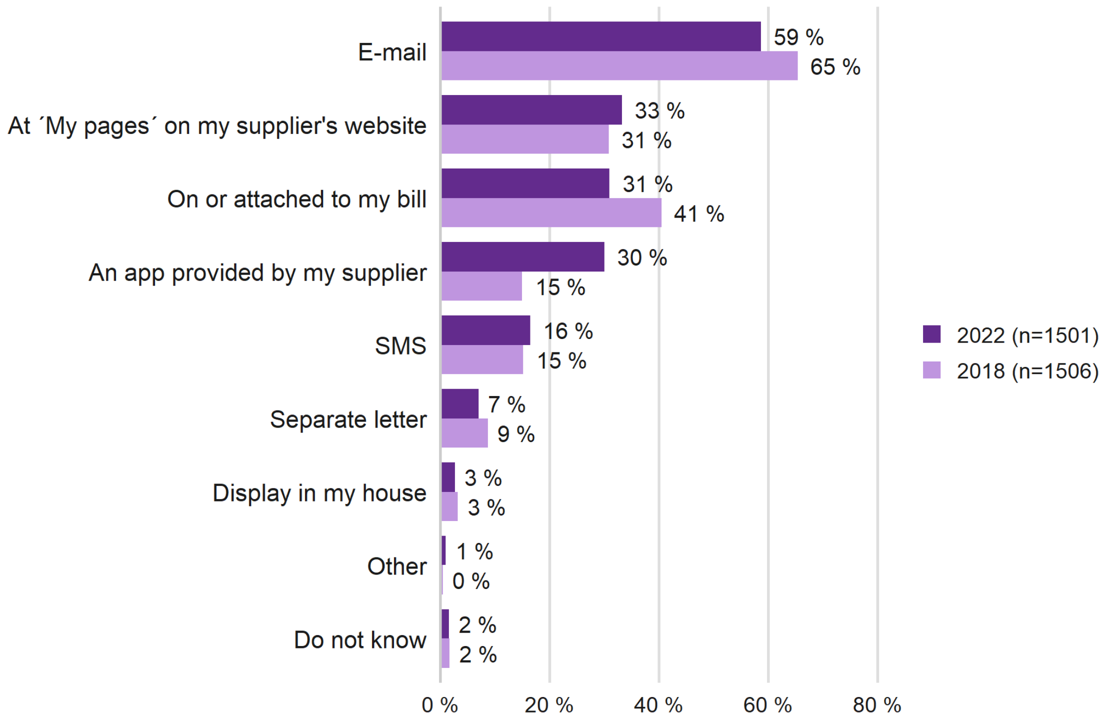
- Compared to respondents who receive their electricity bill as a paper invoice by mail, respondents with electronic bills are more likely to read information about the total amount they have to pay (97%, compared with 86%), specification of consumption (92% compared with 79%) and historical consumption (80% compared to 64%). On the other hand, more of the respondents who receive paper bills look at information about the expiration date (45%, compared to 32% of those with electronic bills), information on how the electricity is produced (47%, compared to 26%), and information about which bodies to turn to for independent advice, dispute resolution, or complaints (47%, compared to 32%).
- Higher shares of respondents with a spot contract say they read the specification of different price elements (90%, compared to 79–84% of those with other contracts) and look at the total amount they have to pay (98%, compared to 93%). More of those who have fixed- or variable-price contracts look for the expiration date (50% and 40%, respectively, compared to 25% of those who have a spot contract), information on how their electricity is produced (38% and 35% respectively, compared to 21% of those with spot price), and information about where to go for independent advice, dispute resolution, or with complaints (46% and 41% respectively, compared to 27%). Finally, those with variable-price contracts are less likely than those who have spot- and fixed-price contracts to read information about their historical consumption (68%, compared to 82–83%) and their consumption specification (83%, compared to 92–93%).

Generally, *inactive* customers read fewer items of information on their bills.

- Lower shares of *inactive* customers than of *active* and *aware* customers look at the specification of their consumption (88%, compared to 95% and 91%) and of the different price elements (80%, compared to 91% and 89%), at their historical consumption (75%, compared to 85%) and estimated yearly consumption (58%, compared to 66% and 70%), and for notifications of changes that affect their electricity price (55%, compared to 65%)/ information about the contract's expiration date (27%, compared to 36 and 38%).

All respondents were asked how they prefer to get information from their electricity supplier.

Figure 166: How do you prefer to get information from your electricity supplier? Multiple answers possible.



Six-in-ten prefer to get information from their electricity supplier via e-mail. 33 percent prefer to read information at "My pages" on their supplier's website, 31 percent prefer to read it on or attached to their bill, and 30 percent prefer information in an app provided by their supplier.

Lower shares prefer to receive information via SMS (16%), separate letters (7%), or via a display in their house (3%).

One percent prefer other information channels, and two percent are unsure.

More respondents prefer information in an app provided by their supplier in 2022 (30%) than in 2018 (15%). Fewer want information on or attached to their bill (31%; down from 41%) and via e-mail (59%; down from 65%).

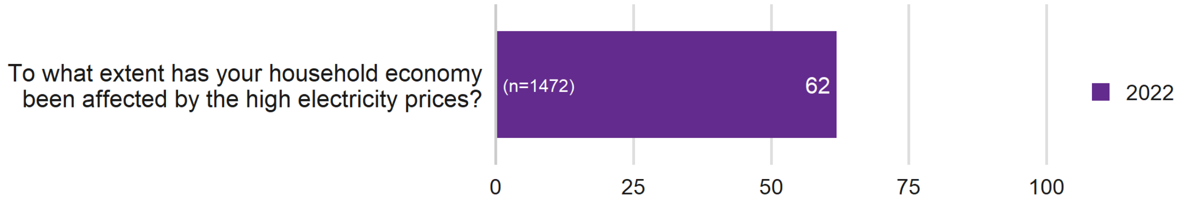
- There is an inverse relationship between age and wanting information in an app provided by their supplier (from 36% of those under 35 to 21% of those aged 65 or older) or via SMS (from 23% to 9%).
- Compared to respondents who receive their bill as a paper invoice by mail, more respondents with electronic bills prefer to get information at "My pages" (34%, compared to 22%) and in an app (31%, compared to 20%). On the other hand, higher shares of those with paper bills prefer to get information by SMS (29%, compared to 16%), in a separate letter (27%, compared to 6%), or via a display in their house (13%, compared to 2%).
- More respondents who have a spot-price contract prefer to get information in an app provided by the supplier, compared to those who have fixed- or variable-price contracts (35%, compared to 26–27%). On the other hand, higher shares of those who have fixed- or variable-price contracts prefer to get information via SMS (21–23%, compared to 13% of customers with spot contracts). Further, a higher share of those who have a variable-price contract prefer to get information in a separate letter (13%, compared to 4–8%) or on a display in their house (7%, compared to 1–4%), compared to those who have fixed- or spot-price contracts.

- A lower share of *inactive* customers prefer to get information in an app, compared to *active* and *aware* customers (21%, compared to 37–38%).

The price shock

In 2022, two questions were added to the questionnaire to address the issue of extraordinarily high electricity prices. The respondents were asked to evaluate the impact of increased electricity prices on their household economy – and to reflect on whether the high prices would influence their future choice of electricity contract.

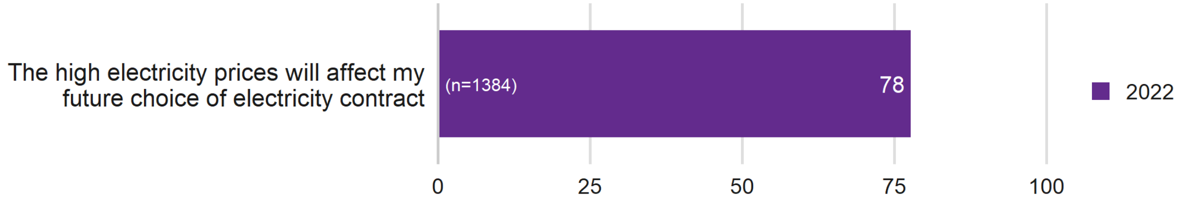
Figure 167: To what extent has your household economy been affected by the high electricity prices? Average scores: 0=Not at all and 100=Very high extent. "Do not know" is excluded.



The Norwegian respondents have to some extent experienced that the high electricity prices have affected their household economy (average score of 62 of 100). 53 percent respond that their household economy has been affected to a high or very high extent, while 21 percent say it has not at all been affected or been affected only to a low extent.

- Respondents under 50 have been affected to a higher extent (65–67), compared to respondents aged 50 or older (55–59).
- Respondents who live in Northern Norway (39) and Central Norway (55) have been less affected by the energy prices, compared to those living in Eastern Norway (64), Southern Norway (67) and Western Norway (67).
- Respondents who have a variable-price contract have been affected to a higher extent (67), compared to respondents with a fixed- (59) or a spot-price contract (62).
- *Inactive* customers have been affected to a lower extent (59), compared to *active* customers (65) and *aware* customers (64).
- There is an association between annual kWh usage and the extent to which respondents' household economy has been affected by the high electricity prices, ranging from an average score of 55 among those who use less than 5,000 kWh annually to 66 among those who use 20,000 kWh or more.

Figure 168: To what extent do you agree that the high electricity prices will affect your future choice of electricity contract? Average scores 0=Fully disagree and 100=Fully agree. "Do not know" is excluded



The Norwegian customers generally agree that the high electricity prices will affect their future choice of electricity contract (78). 66 percent agree that this will affect their future choice of contract, while five percent disagree.

- Respondents over 65 agree to a lower extent that the high electricity prices will affect their future choice of electricity contract (72), compared with younger respondents (78-81).
- Those who use 20,000 kWh or more pr year agree more strongly that the high electricity prices will affect their future choice of electricity contract (83), compared with respondents who use less electricity (75-78).
- *Active* (85) and *aware* (80) customers agree more strongly than *inactive* customers (72) that the high prices will affect their future choice of electricity contract. A higher share of *inactive* customers say that they do not know whether the high prices will affect their future contract choice (12%), compared to *active* (5%) and *aware* (4%) customers.
- Respondents who have a variable-price contract agree to a lower extent that the high prices will affect their future choice of electricity contract (75), compared to those who have fixed- (80) or spot-price contracts (79).
- There is an association between the extent to which the respondents *have been affected* by the high prices and how strongly they agree that the high prices will affect their future choice of electricity contract. The average score ranges from 69 among those who respond that their household economy has been affected to a low extent or not at all to 83 among those who say that their household economy has been affected to a high or very high extent.

The Swedish customers

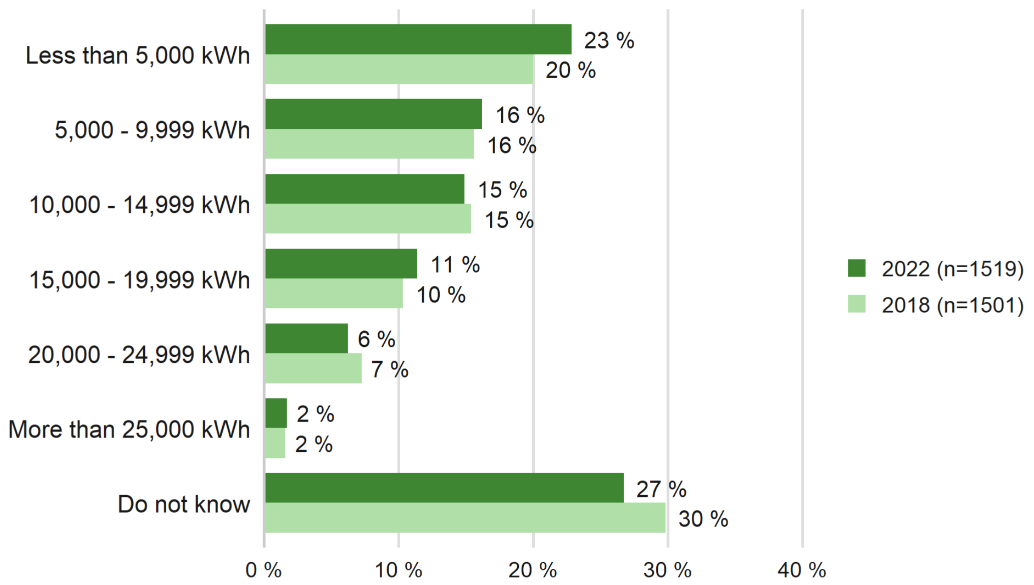
This chapter takes a closer look at the *Swedish* electricity customers and their presence and participation in the electricity market, as well as their attitudes towards the Swedish electricity market. Interesting and significant differences between subgroups are remarked upon and the results are, when possible, compared with the 2018 results.

Note that some results are presented as *average scores* rather than as percentages. This is done when respondents were asked to respond on a five-point scale – for example, from *1 = Fully disagree* to *5 = Fully agree*. The response values have been recoded so that "fully disagree" is set to 0 and "fully agree" is set to 100, with the other categories coded at equal intervals in between. The average of the recoded responses is then presented as a question's "average score" on a scale from 0 to 100. An overview of how these scores are interpreted is available in the methods section of the report.

The Swedish customers' presence in the electricity market

The respondents were asked different questions about their presence in the Swedish electricity market.

Figure 169: Approximately how many kilowatt-hours do you use each year?



Eight percent of the Swedish respondents report that they use 20,000 kWh or more per year, 26 percent use between 10,000 and 19,999 kWh, and 39 percent use less than 10,000 kWh per year.

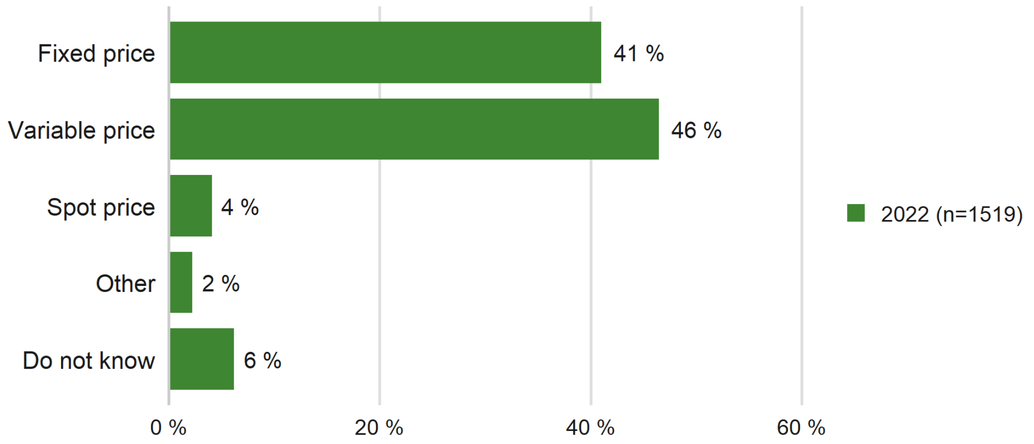
- Those who live in an apartment consume less electricity than those who live in a house.
- *Active* customers report a lower consumption level than *aware* and *inactive* customers.
- Respondents who have variable-price contracts report a somewhat lower consumption than those who have fixed price.

27 percent respond that they *do not know* how much electricity they use in a year. There are no significant differences between 2018 and 2022.

- Those who live in an apartment are more inclined to answer that they do not know how much they consume (34%, compared to 16% of respondents who live in a house).
- *Inactive* customers are more likely than *active* and *aware* customers not to know their consumption (34%, compared to 11% of *aware* and 17% of *active* customers).

In 2022, a question about current contract type was added to the questionnaire.[30]

Figure 170: What kind of electricity contract do you have today?



Forty-one percent of the Swedish electricity customers say they have a fixed-price contract, while 46 percent have variable price. Four percent have spot contracts, two percent have some other contract, and six percent do not know their current contract type.[31]

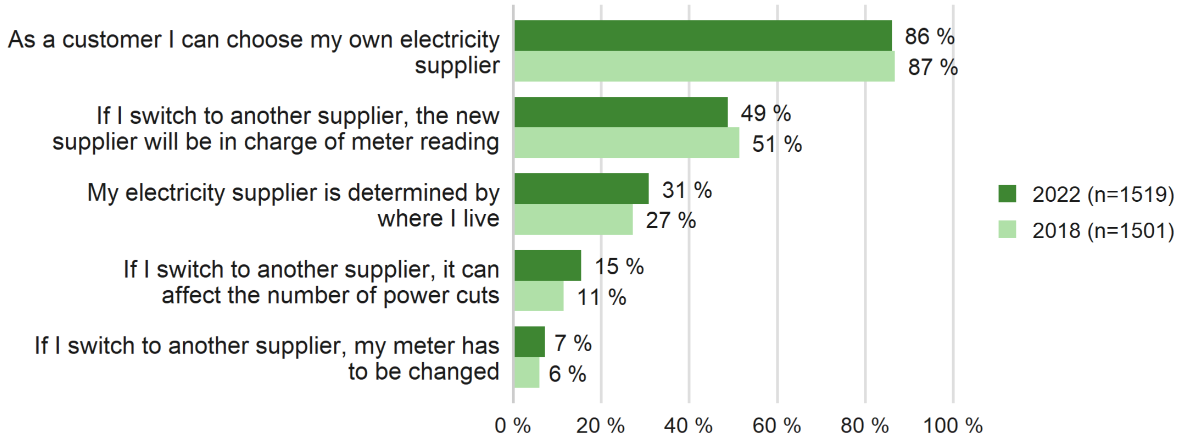
- Fixed-price contracts are more common among those who live in a house (46%) than among those in apartments (38%).
- Though the share is still small, more of the *active* customers than the *aware* and *inactive* customers have a spot contract (8%, compared to 2–3%).

[30] The section "Contract types" (p.22) provides more information about this question.
[31] Note that as this is self-reported information it may diverge considerably from information about contract types gathered by other means.

The Swedish customers' knowledge of the electricity market

The electricity customers were asked to consider different statements concerning electricity suppliers and the process of switching suppliers.

Figure 171: Do you believe the following statements are correct or not? Shares who believe that the statements are correct.



The vast majority (86%) believe that they can choose their own electricity supplier.

Almost half (49%) believe that in the event of a change of supplier, the new supplier will be responsible for meter reading. One-in-three (33%) say that they do not know whether or not that statement is correct.

Thirty-one percent believe that their electricity supplier is determined by where they live, while 57 percent believe that this is incorrect. 15 percent believe that changing electricity supplier can impact the number of power cuts, and only seven percent believe that their meter must be replaced in the event of a change of supplier.

While these results are quite similar to the results from 2018, the overall impression is that Swedish electricity customers come across as *slightly* less knowledgeable about the electricity market in 2022:

Compared to 2018, the share of Swedes who believe that their electricity supplier is determined by where they live has not changed significantly. There is, however, a significant decrease in the share who believe this to be *incorrect* (from 64% to 57%), and a significant increase in the *do-not-know*-share (from 9% to 12%).

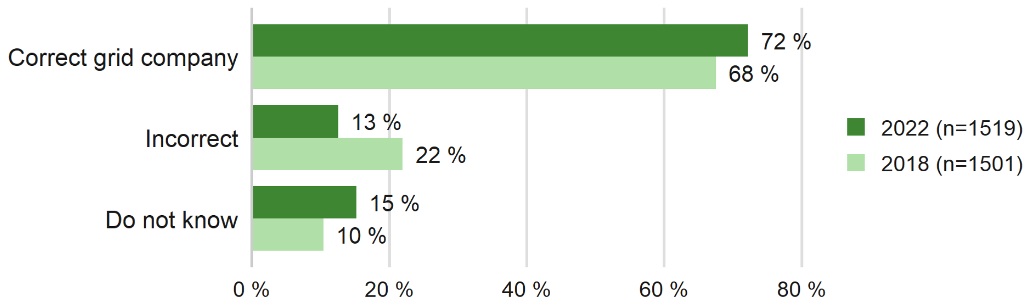
Moreover, significantly more Swedes now believe it to be *correct* that switching to another supplier can affect the number of power cuts (15%; up from 11% in 2018), while significantly fewer believe the statement to be *incorrect* (60%; down from 66%). Around one-in-four (22% in 2018 and 25% in 2022) are unsure.

- There are significant, linear age differences in the responses to all five statements. The youngest respondents (under 35) generally have the least knowledge about the electricity market, while the oldest (65 or older) know the most.
  - The difference between the youngest and the oldest age group is 32 percentage points in the share who say it is *incorrect* that their electricity supplier is determined by where they live (36% under 35; 68%, 65 or older), 31 percentage points in the share who say it is *incorrect* that their meter has to be changed if they switch supplier (51% under 35; 82%, 65 or older), and 30 percentage points in the share

who identify it as *incorrect* that switching to another supplier can affect the number of power cuts (43% under 35; 73%, 65 or older).
    - Furthermore, there is a range of 17 percentage points in the share who say it is *correct* that they can choose their own electricity supplier (from 75% under 35 to 92% of those 65 or older), and 12 percentage points in the share who say it is *correct* that the new supplier would be in charge of meter reading (from 43% to 55%).
    - Respondents under 35 generally have the highest shares of "do not know"-answers.
- *Active* customers generally have more knowledge about the electricity market than *aware* and *inactive* customers.
    - Higher shares of *active* customers believe that it is *incorrect* that their supplier is determined by where they live (69%, compared to 52% of *aware* customers and 55% of *inactive* customers), that their meter has to be changed if they switch to another supplier (82%, compared to 71% and 67%), and that if they switch suppliers, it can affect the number of power cuts (69%, compared to 57% and 57%).
    - Also, a higher share of *active* customers believe that as a customer, they can choose their own supplier (93%, compared to 83% and 85%).

The respondents were asked to name the company that operates the power lines to their home (their grid company), their own electricity supplier, and two other electricity suppliers.

Figure 172: Name the company that operates the power lines to your home.[32]



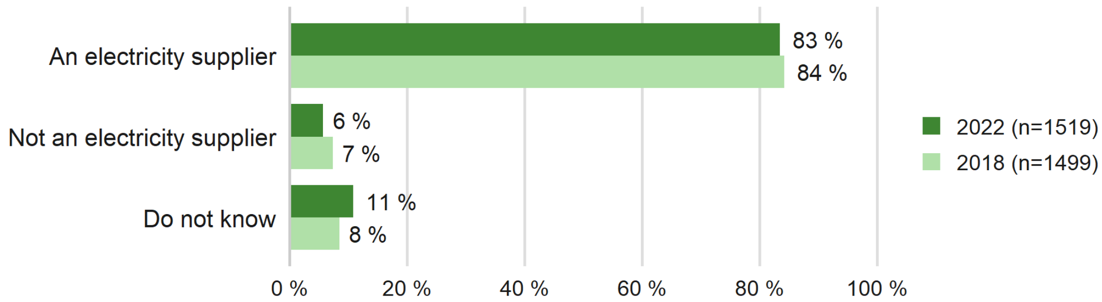
Seventy-two percent of the Swedish respondents correctly name their grid company. 13 percent give an incorrect name for their grid company, name another grid company, or answer something that is not a grid company. 15 percent *do not know* the name of their grid company.

In 2018, 68 percent could name their grid company, 22 percent gave an incorrect answer, and 15 percent did not know.

- There is an association between age and knowing the name of your grid company – ranging from 63 percent of those under 35 to 82 percent of those who are 65 or older.
- A lower share of respondents who receive their electricity bill as a paper invoice by mail know their grid company, compared with those who have an electronic bill (65% and 74%, respectively). Those with paper bills are also more inclined to answer that they do not know (23%, compared with 13% of customers with an electronic bill).
- The share of correct answers is lowest among the *aware* customers (66%) and highest among the *active* customers (80%). 71 percent of the *inactive* customers know the name of their grid company.

[32] This variable is based on the respondents' postal codes. It should be considered that the postal codes may be incorrect (e.g., if respondents have moved, etc.).

Figure 173: Who is the electricity supplier in your home?

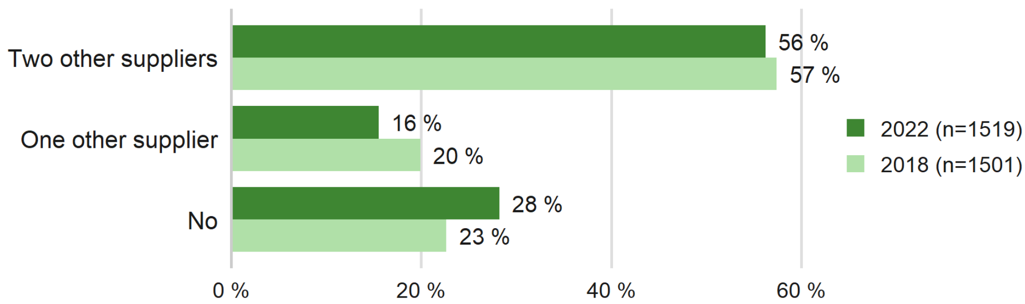


Eighty-three percent of the Swedish respondents answer with the name of an actual electricity supplier.[33] Six percent answer something that is not an electricity supplier, and 11 percent say that they *do not know* who their electricity supplier is.

In 2018, 84 percent named an electricity supplier, seven percent gave an incorrect answer, and 8 percent said they did not know.

- Again, the share of correct answers increases with age – ranging from 77 percent of those under 35 to 89 percent of those who are 65 or older.
- Moreover, the share of correct answers is lower among customers who receive their electricity bill as a paper invoice by mail, compared with those who have an electronic bill (76% and 85%, respectively). A higher share of those who receive a paper bill say that they do not know (17%, compared with 9%).
- As regards customer types, the share of correct answers is lowest among the *aware* customers (79%) and highest among the *active* customers (92%). 82 percent of the *inactive* customers name an actual electricity supplier.
- More of the respondents who live in houses name an electricity supplier, compared with those who live in apartments (87% and 81%, respectively). A larger share of respondents in apartments say they do not know the name of their supplier (13%, compared to 8% of house-dwellers).

Figure 174: Can you name two other electricity suppliers?



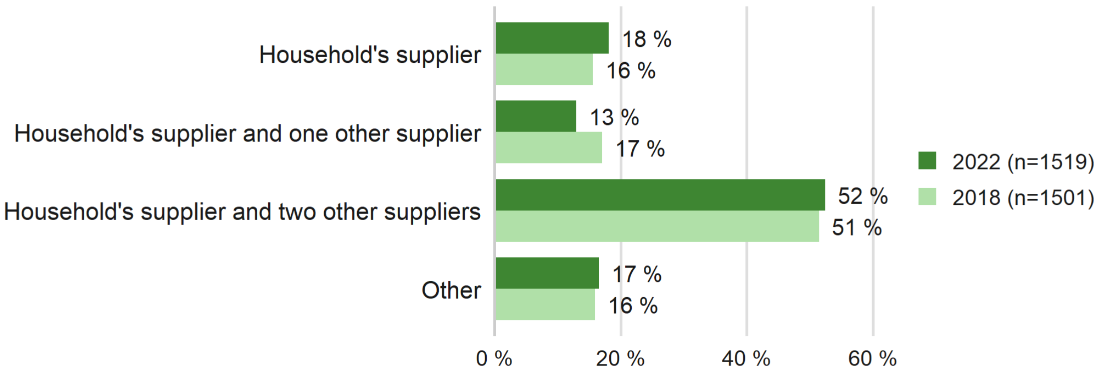
Fifty-six percent give the names of two other actual electricity suppliers, while 16 percent name one other supplier. 28 percent cannot name any other electricity suppliers.

In 2018, 57 percent named two other electricity suppliers, 20 percent named one other supplier, and 23 percent could not name any other suppliers.

[33] We cannot know whether this is their actual electricity supplier or some other supplier.

- The share who accurately name two other electricity suppliers ranges from 42 percent of respondents under 35 to 64 percent of respondents 65 or older.
- Sixty-nine percent of the *active* customers, 59 percent of the *aware* customers, and 52 percent of the *inactive* customers, name two other actual electricity suppliers.
- Sixty-one percent of those who live in a house, and 53 percent of those who live in an apartment, name two other suppliers.
- Seventy-three percent of those with a spot contract name two other suppliers, compared with 59 percent of those with variable price and 54 percent of those with fixed price.

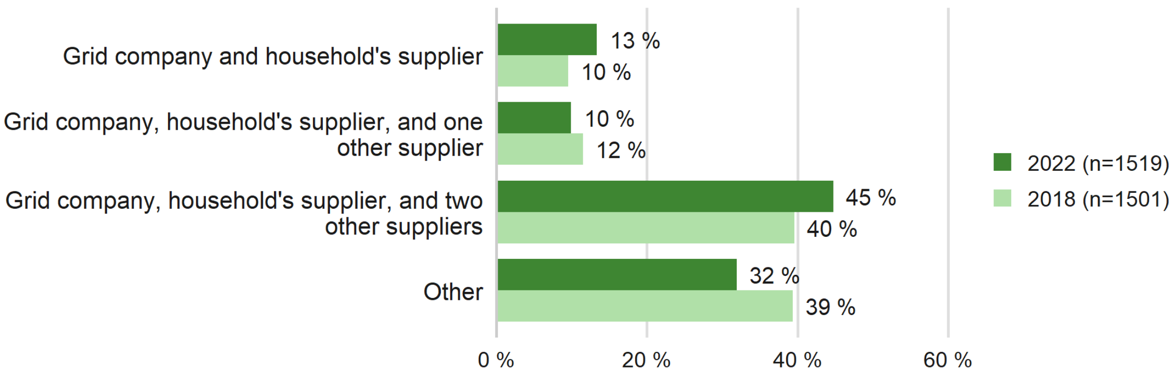
Figure 175: Total knowledge of electricity suppliers.



Eighteen percent of the Swedish electricity customers know only their own supplier. 13 percent also know the name of one other supplier, while 52 percent know both their own supplier and two other suppliers. 17 percent answer something other than an actual electricity supplier (a grid company or something else), or that they do not know. There are only small differences between 2018 and 2022.

- There is an association between age and knowledge of electricity suppliers. 39 percent of Swedish respondents under 35, 50 percent of those between 35 and 49, and 59 percent of those who are 50 or older, know their household's supplier and two other suppliers.
- Two-in-three *active* customers name three electricity suppliers (67%). This is achieved by 55 percent of the *aware* customers and 47 percent of the *inactive* customers.
- Fifty-eight percent of those who live in a house, and 48 percent of those in an apartment, name three electricity suppliers.
- Sixty-nine percent of those with a spot contract, 56 percent of those with variable price, and 49 percent of those with fixed-price contracts name three electricity suppliers.

Figure 176: Total knowledge of the electricity market.



Thirteen percent of the Swedish respondents correctly name the company operating power lines to their home (their grid company) and *one* actual electricity supplier. 10 percent know their grid company and *two* electricity suppliers. A total of 45 percent know both their grid company, their own electricity supplier, and *two other* electricity suppliers. 32 percent of the respondents could not name their grid company and at least one actual electricity supplier ("Other" in the figure).

While again there are only small differences compared with 2018, these results may indicate a somewhat higher level of knowledge about the electricity market in 2022.

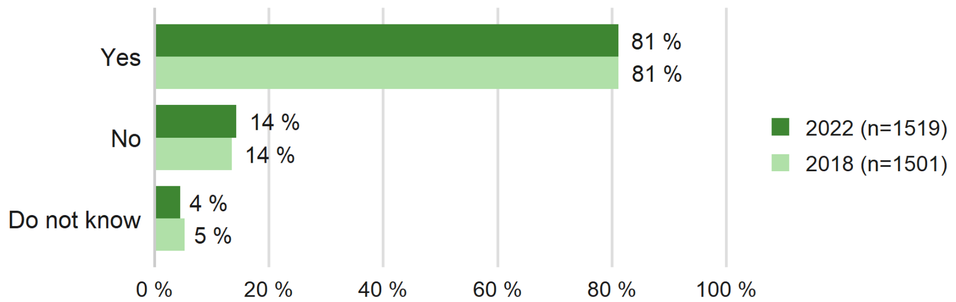
- There is an association between age and knowledge of the electricity market. 32 percent of Swedish respondents under 35, 41 percent of those aged 35– 49, 53 percent of those 50–64, and 52 percent of respondents who are 65 or older, know their grid company, their own electricity supplier, and two other electricity suppliers.
- Fifty-nine percent of *active* customers, 43 percent of *aware* customers, and 41 percent of *inactive* customers can name their grid company and three electricity suppliers.
- Fifty percent of those who live in a house, and 41 percent of apartment-dwellers, can name their grid company and three electricity suppliers.
- Sixty-six percent of those with spot-price contracts, 48 percent of those with variable price, and 41 percent of those with fixed-price contracts, know their grid company and three electricity suppliers.

The Swedish customers' participation in the electricity market

Respondents were also asked different questions related to their participation in the electricity market, including signing and comparing electricity contracts, the use of online comparison tools, and knowledge of contractual terms.

Signing and comparing contracts

Figure 177: Have you ever signed a contract with an electricity supplier?

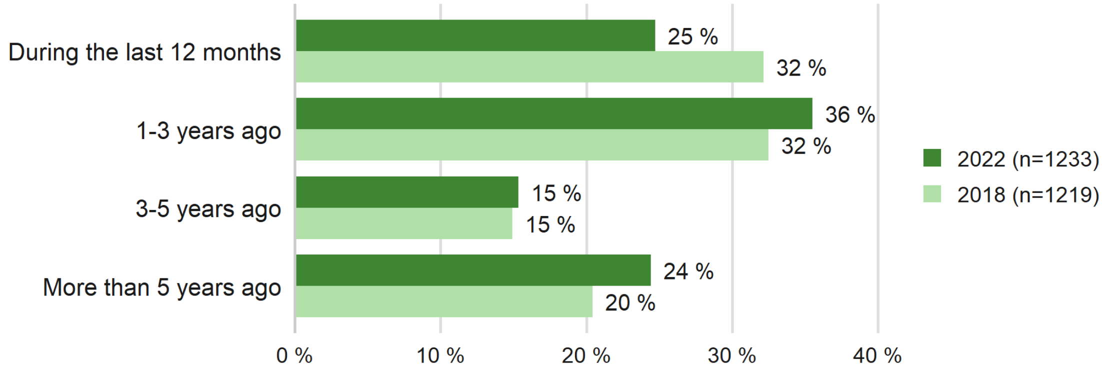


Eighty-one percent of the Swedish electricity customers have (ever) signed a contract with an electricity supplier. 14 percent have not done so, and four percent are unsure. This has not changed since 2018.

- There is an association between age and having signed an electricity contract, ranging from 72 percent of those who are under 35 to 87 percent of those who are 65 or older.

Those who responded that they *had* signed a contract with an electricity supplier were asked when they did so last.

Figure 178: When did you last sign a new contract with an electricity supplier? Percent of respondents who have ever signed a contract.



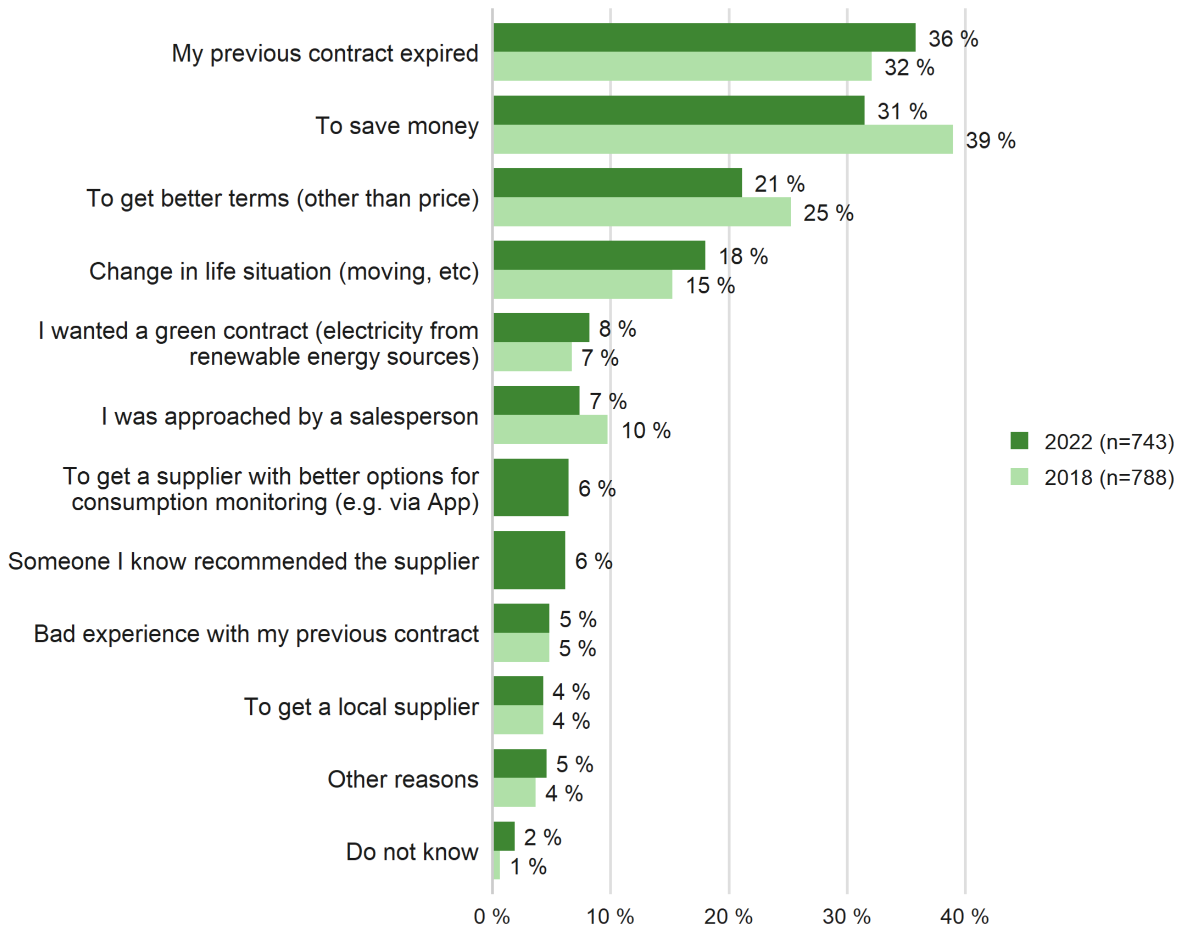
One-quarter of those who had signed a contract did so less than one year ago and are considered *active* customers. 36 percent signed 1–3 years ago, while 15 and 24 percent, respectively, signed 3–5 years ago and more than five years ago.

Compared with 2018, there are significantly fewer *active* Swedish customers in 2022 (down from 32% to 25%).

- Just eleven percent of respondents under the age of 35 signed a contract more than 5 years ago, compared to 21–32 percent of those aged 35 or older.
- A higher share of the Swedish customers with a spot contract had signed during the last 12 months (42%), compared with those with fixed or variable price (28% and 22%, respectively).
- Respondents with a paper bill had older contract-signing experiences, compared with those with an electronic bill. 15 percent of those with a paper bill, and 27 percent of those with an electronic bill, signed during the last 12 months, while 35 percent with a paper bill and 22 percent with an electronic bill signed more than five years ago.

Respondents who had signed a new contract *in the past three years* were also asked *why* they signed a new contract.

Figure 179: Why did you sign a new electricity contract? Multiple answers possible. Respondents who signed a contract in the past three years.



The most common answer was that their previous contract expired (36%). 31 percent signed a new contract to save money, 21 percent to get better terms (other than price), and 18 percent because of a change in their life situation.

Eight percent wanted a green contract, seven percent signed because they were approached by a salesperson, and six percent signed to get better options for consumption monitoring/because the supplier was recommended by someone they know. Five percent switched contracts because of a bad experience with their previous contract, and four percent wanted a local supplier.

Five percent cited other reasons, and two percent were unsure.

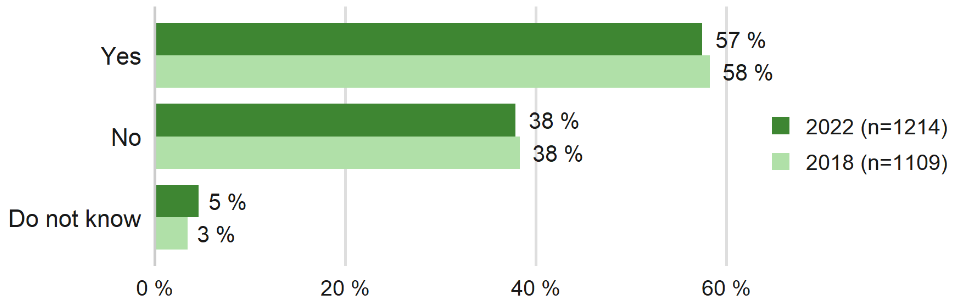
Compared with 2018, the share of Swedish respondents who say they signed a new electricity contract to save money is lower in 2022 (31%; down from 39%). Other changes are not significant.

- The share who signed the new contract because their previous contract expired increases with age – from 16 percent of those under 35 to 49 percent of those aged 65 or older. Conversely, the youngest respondents (under 35) had more often signed a new contract due to a change in their life situation (29%, compared to 10–17% in the older age groups – the share declines with rising age). Compared with the older age groups, moreover, more respondents under 35 also signed a new contract to get better options for consumption monitoring (13%, compared to 2–7%) and/or because the supplier was recommended by someone they know (14%, compared to 1–7%).

- A higher share of *active* customers signed the contract because their previous contract expired (43%), compared to *aware* (25%) and *inactive* (34%) customers. The share answering "someone I know recommended the supplier" is highest among the *aware* customers (15% compared to 3–5% of *active* and *inactive* customers). The share who signed a new contract to save money is lowest among *inactive* customers (25%, compared to 33% of *active* and 40% of *aware* customers).
- More respondents who live in a house signed a new electricity contract to save money, compared with those who live in an apartment (37% and 27%, respectively). House-dwellers were also considerably more likely to have signed because their previous contract expired (44%, compared to 30%). Conversely, "change in life situation" was a more common reason among those living in apartments (24%, compared to 11%) – as was "bad experience with my previous contract" (7%, compared to 2%).
- A larger share of those with fixed-price contracts had signed because their previous contract expired, compared with those who have variable- or spot-price contracts (48%, compared to 24–26%). One-in-four customers with a spot-price contract signed to get a supplier with better options for consumption monitoring (26%), compared with 5–6 percent of those with fixed/variable price. A higher share of those who have a variable-price contract signed because of a change in their life situation (24%), compared to those who have a fixed- or a spot-price contract (both 13%).

Customers who are not considered to be *active* (i.e., respondents who have not signed a new contract in the past year) were asked if they have ever *compared* their current contract to other contracts.

Figure 180: Have you ever compared your current electricity contract to other contracts? Percent of respondents who have not signed a contract in the past 12 months (aware and inactive customers).

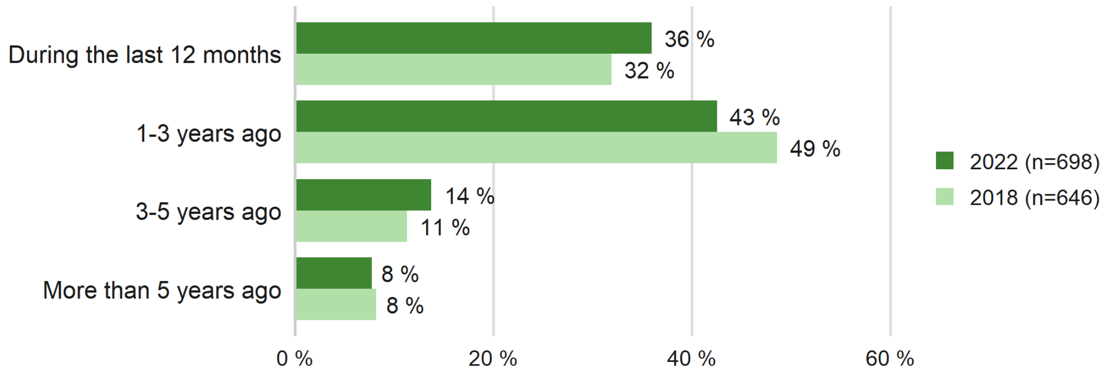


Almost six-in-ten have compared their current electricity contracts to other contracts (57%), while almost four-in-ten have never done this (38%). Five percent respond that they are unsure. This is practically identical to the result in 2018.

- More customers who live in a house (63%) than who live in an apartment (54%) have compared their current contract with other contracts.

Those who had compared their current contract to other contracts were asked when they last did this.

Figure 181: When did you last compare your current electricity contract to other contracts? Percent of *aware* and *inactive* customers who have ever compared contracts.



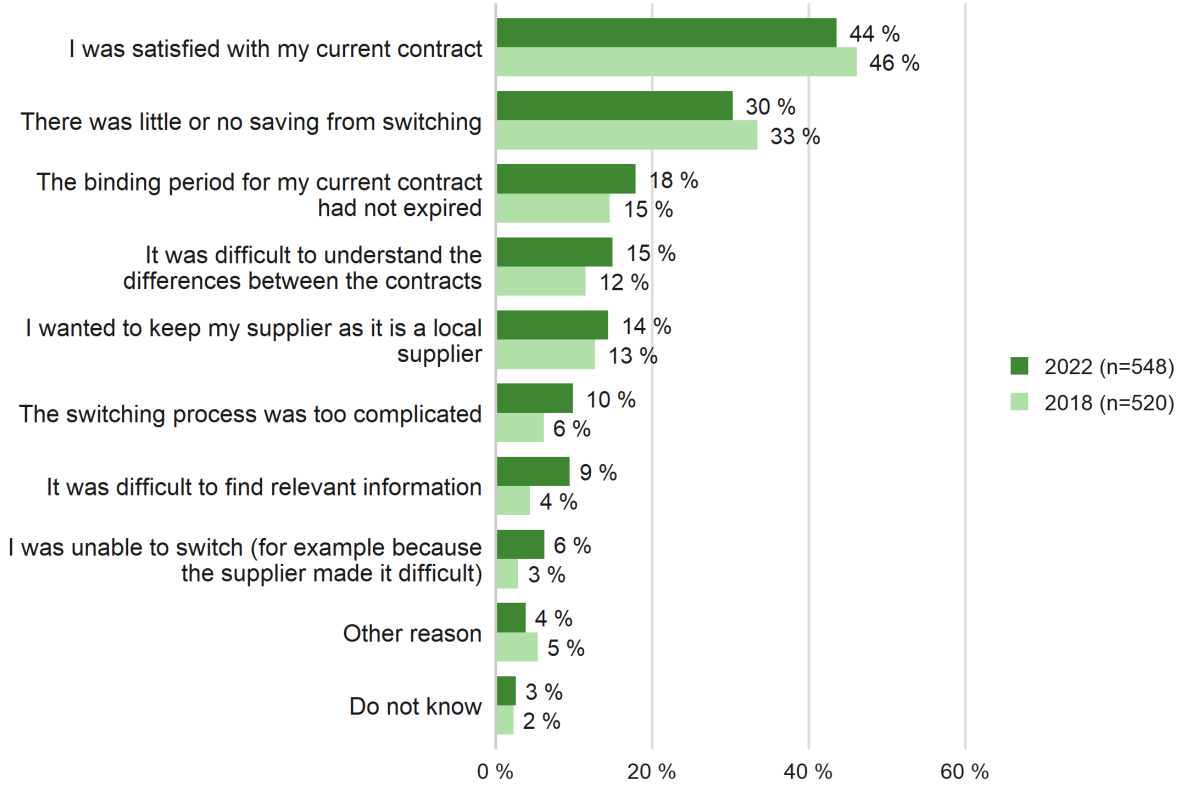
Thirty-six percent of those who have compared their contract to other contracts have done this within the past year and are considered *aware customers*. 43 percent compared contracts 1–3 years ago, while 14 percent did so 3–5 years ago. Eight percent of those who have compared their own contract to others did so more than five years ago.

Compared with 2018, there is a significant decrease (of 5 percentage points) for the share who compared their current electricity contract to other contracts 1–3 years ago, and an *insignificant* increase (of 4 percentage points) for the share who compared contracts during the last 12 months.

- A larger share of the youngest customers (under 35) who had compared contracts had done so during the last 12 months (52%, compared to 32–26% in the older age groups).

Those who compared different contracts in the past three years, but did not switch, were asked why they chose to keep their current contract.

Figure 182: You have compared different offers but decided to stay in your current contract. Why? Multiple answers possible. Percent of respondents who have compared contracts in the past three years but not switched.



Forty-four percent decided to keep their current contract because they were satisfied with it. 30 percent decided to stay because there was little or no money to save by switching.

It was less common to stay with the contract because the current binding period had not expired (18%); because it was difficult to understand the differences between contracts (15%); or to keep a local supplier (14%).

Fewer still say that they did not switch because the switching process was too complicated (10%); it was difficult to find relevant information (9%); or because they were unable to switch (6%).

Four percent give other reasons for deciding to remain in their current contract, while three percent are unsure.

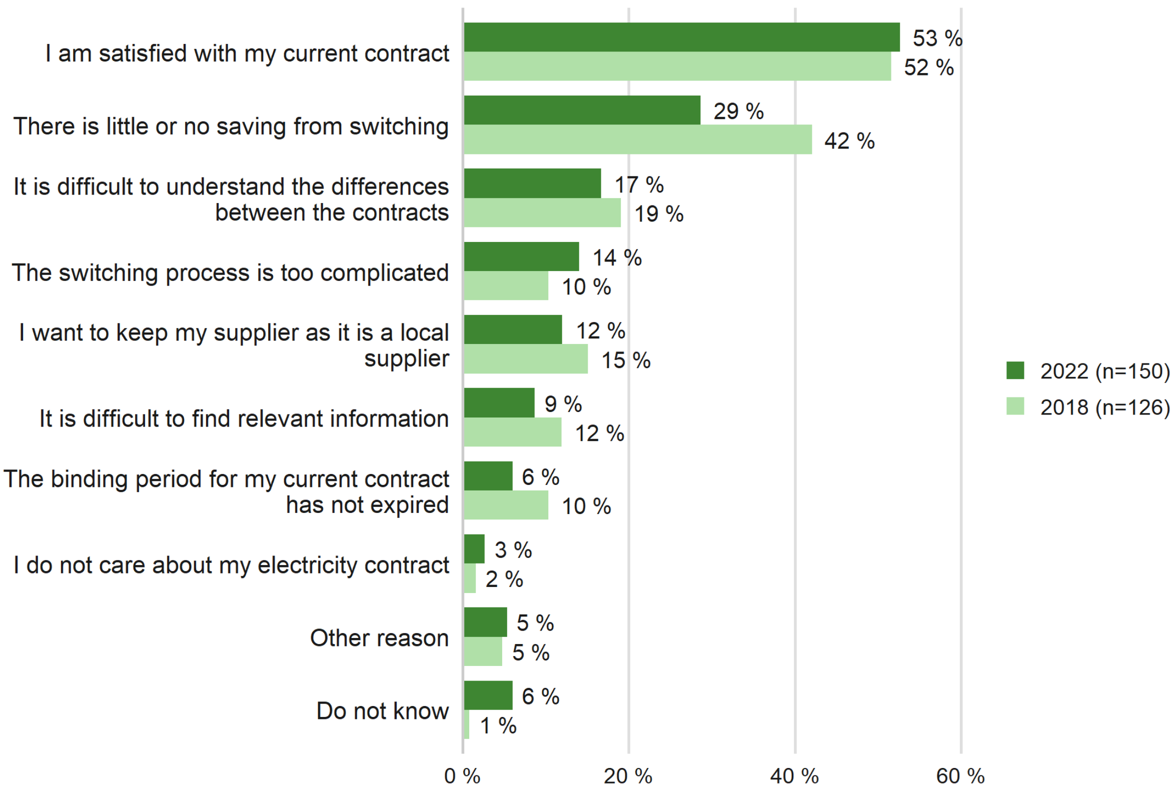
Compared to 2018, a higher share of the Swedish electricity customers say that "it was difficult to find relevant information" in 2022 (9%; up from 4%). Other changes are not significant.

- More of the younger respondents say that they found it difficult to understand the differences between contracts. One-in-five under the age of 50 (19% of those under 35 and 22% in the 35–49 age bracket) cite this as a reason for not switching electricity contracts, compared to only 10 percent of those aged 50–64 and eight percent of those 65 or older. Larger shares of the youngest respondents also report that they were *unable* to switch (ranging from 11% of respondents under 35 to 0% among those 65 or older); that they wanted to keep their local supplier (ranging from 29% to 9%); that it was difficult to find relevant information (from 16% to 6%); and that the switching process was too complicated (from 15% to 5%).

    - On the other hand, significantly more of the *oldest* respondents decided to stay in their contract because they were satisfied with it (56% of those who are 65 or older, 49% of those 50–64, and 36% of respondents under 50).
- Fewest among those with a fixed-price contract say that they kept their contract because there was little or no saving from switching: 21 percent of respondents with fixed price, 33 percent of those with spot price, and 38 percent of respondents with variable price, chose this option.
    - The share answering that their binding period had not expired is highest among customers with a fixed-price contract (27%, compared to 17% of those with spot- and 11% of those with variable-price contracts).
- There is an inverse relationship between electricity consumption and saying that there was little or no saving from switching, ranging from 43 percent among those whose annual use is less than 5,000 kWh to just 15 percent among those who use at least 20,000 kWh per year.

Those who had neither switched nor compared contracts in the past three years were asked why they had not done so more often.

Figure 183: Why have you not switched or compared contracts more often? Multiple answers possible. Percent of respondents who have neither signed a new contract nor compared contracts in the past three years.



The majority (53%) have not switched or compared contracts more often because they are satisfied with their current contract. 29 percent, moreover, say that they have not done so because they would save little or no money by switching.

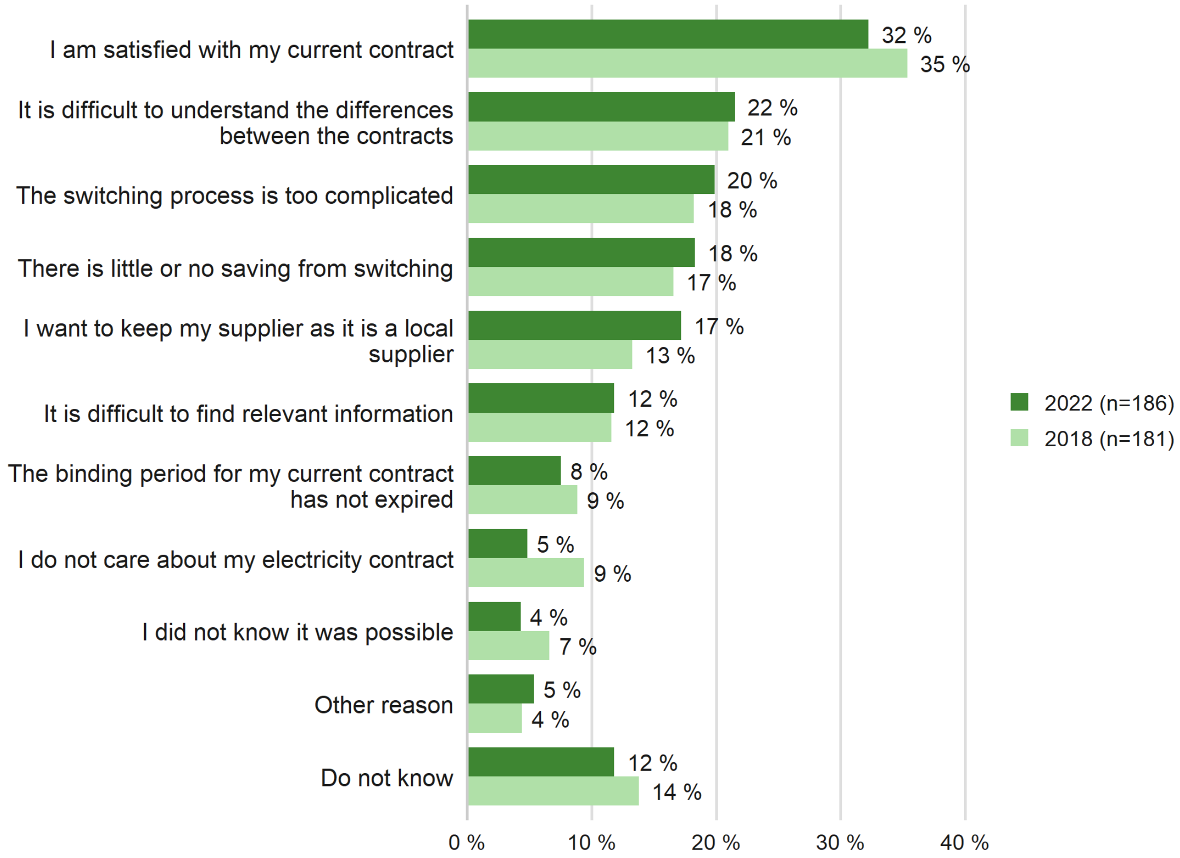
Seventeen percent say that it is difficult to understand the differences between the contracts, while 14 percent find the switching process to be too complicated. 12 percent have not switched/compared more often because they want to keep their local supplier.

Few have been inactive in the electricity market for at least three years because they find it difficult to find relevant information (9%), because their binding period has not expired (6%), or because they do not care about their contract (3%).

Six percent are unsure, and five percent give other reasons.

Those who have *never* switched or compared contracts were asked *why* they had never done this.

Figure 184: Why have you never switched or compared contracts? Multiple answers possible. Respondents who have never switched or compared contracts.



The most common response is that they are satisfied with their current contract (32%). It is also fairly common to answer that it is difficult to understand the differences between contracts (22%); that the switching process is too complicated (20%); that savings would be minimal (18%); and/or that they want to keep their local supplier (17%).

Fewer have been inactive in the electricity market because they think it is difficult to find relevant information (12%); the binding period of their contract had not expired (8%); they do not care about their electricity contract (5%); and/or they did not know that switching was possible (4%).

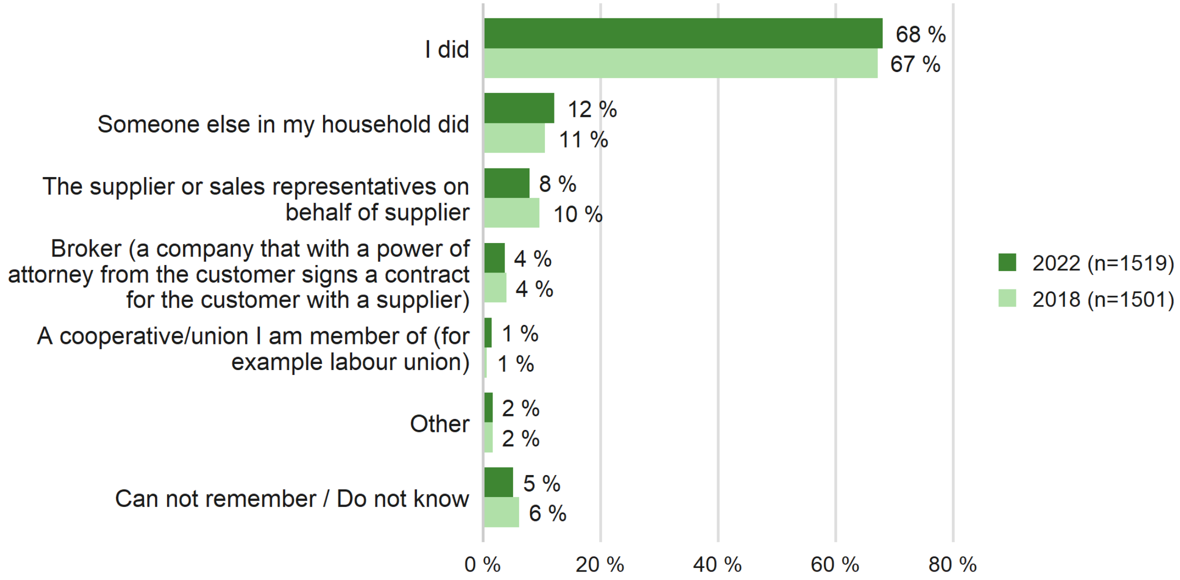
Five percent give other reasons for not switching or comparing contracts, while 12 percent are unsure.

As there are few responses to this question the numbers cannot be meaningfully compared with the 2018 results – and there are no noteworthy differences between the subgroups.

The contract-signing process

The respondents were then asked questions related to the signing process, including who initiated the signing of their current contract; how they chose the contract; how they were contacted by the supplier; etc.

Figure 185: Who initiated the signing of your current contract?



Two-thirds of the Swedish electricity customers initiated the signing of their current contract themselves (68%), while roughly one-in-ten say that the signing was initiated by someone else in the household (12%).

Eight percent say that the signing was initiated by the supplier or its sales representatives.

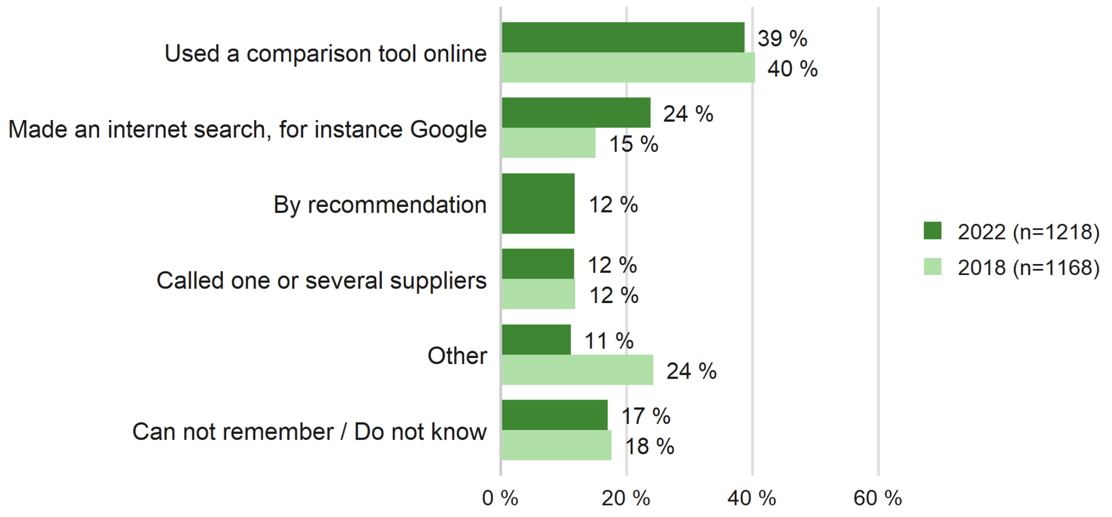
Contracts were rarely initiated by a broker (4%), a cooperative/union (1%), or other parties (2%). Five percent do not know or remember who took the initiative for their current contract.

There are no significant differences between 2018 and 2022.

- The share who initiated the signing themselves is lowest among the youngest respondents (58% of respondents under 35, compared to 66–76% in the other age groups). The share is *highest* among those aged 50–64 (76%).
- The share who initiated their current contract themselves is highest among the *active customers,* 79 percent, compared to 71 percent among the *aware* and 64 percent among the *inactive* customers.
- A considerably smaller share of the respondents who get their electricity bill on a paper invoice by mail say that they initiated the contract themselves, compared with those who get their bill electronically (55% and 71%, respectively).
- The share responding “someone else in my household” is higher among those living in houses (17%, compared to 9% of those living in apartments).

Electricity customers who responded that either they, or someone else in their household, initiated the signing of their current contract, were asked how they *chose* their contract.

Figure 186: How did you go about choosing electricity contract? Multiple answers possible. If signing initiated within own household.



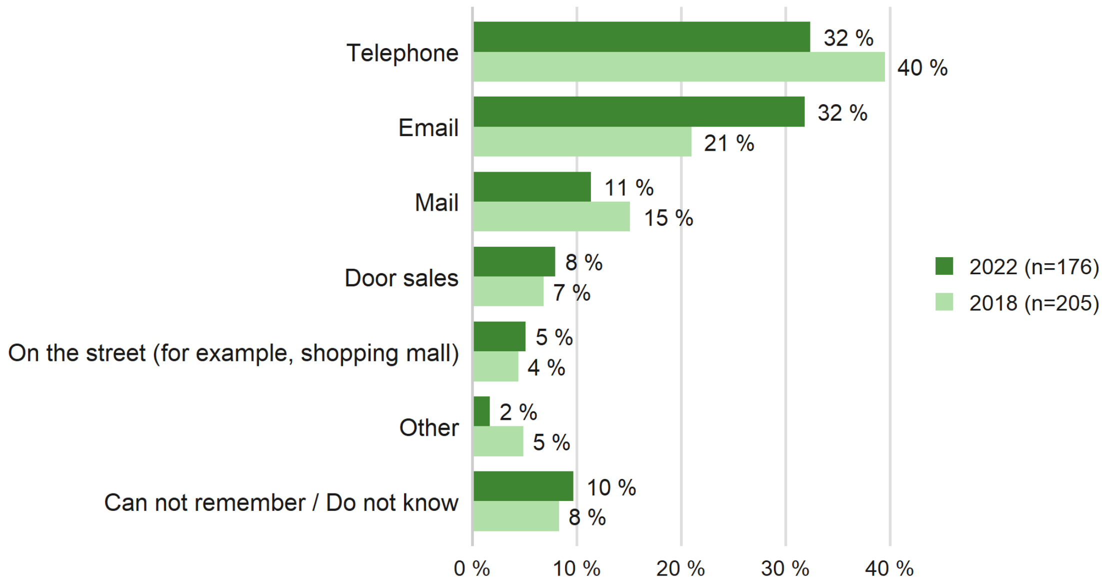
Thirty-nine percent used a comparison tool online when choosing their electricity contract. 24 percent did an internet search. 12 percent went by recommendation and/or called one or several suppliers, 11 percent had some other approach, and 17 percent do not know or remember how they chose their contract.

Compared with 2018, significantly more respondents did an internet search in 2022 (24%; up from 15%).

- A lower share of the oldest respondents made an internet search (17% of those aged 65 or older, compared to 24–29% of younger respondents).
- The *aware* (55%) and *active* (50%) customers used comparison tools to a greater extent than did the *inactive* customers (30%). More *aware* customers also called someone (18%, compared to 12–10%), and/or did an internet search (32%, compared to 25–21%).
    - A significantly higher share of the *inactive* customers do not know or remember how they went about choosing their electricity contract (23%, compared to 9% of *active* and 7% of *aware* customers).
- A lower share of customers who get their electricity bill as a paper invoice by mail had used an online comparison tool (30%, compared to 40% of those with electronic bills).

Those who answered that their current contract was initiated by an electricity supplier or broker were asked how they had been contacted by the supplier/broker.

Figure 187: How did they contact you? Percent of respondents who were contacted by a supplier or broker.



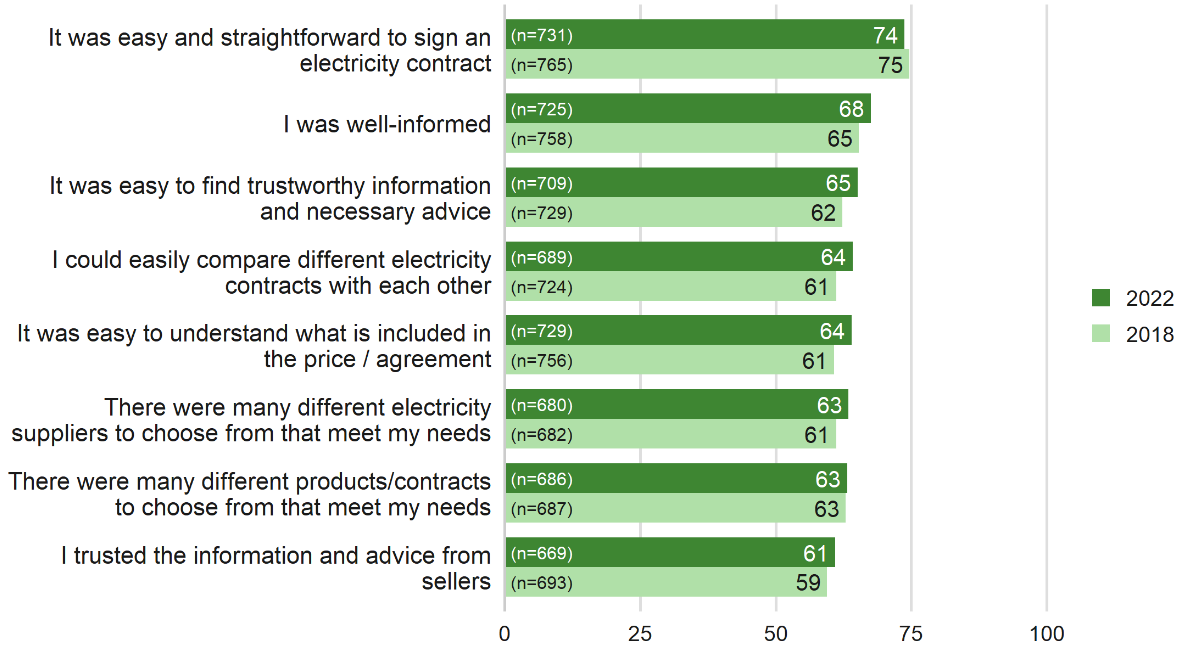
Thirty-two percent were contacted by phone, and another 32 percent were contacted by email. 11 percent were contacted by mail, eight percent via door sales, and five percent on the street/in a public space.

Two percent report other forms of contact, while 10 percent do not know or remember how they were contacted by the electricity supplier or broker.

Because there are few responses to this question the differences between 2018 and 2022 are not statistically significant.

Customers who had signed a new contract in the past three years were asked to consider different statements related to the process.

Figure 188: Before you made your current choice of electricity contract, to what extent did you experience the following …? Average scores: 0=Not at all and 100=High extent. "Do not know" is excluded. Respondents who have signed a new contract in the past three years.



The Swedish electricity customers found it to be easy and straightforward to sign their current electricity contract to a fairly high extent (average score 74 out of 100). They experienced to a moderate extent that they were well-informed (68) and that it was easy to find trustworthy information and necessary advice (65) – and, to some extent, that: They could easily compare different contracts (64); it was easy to understand what was included in the price (64); there were many different electricity suppliers and products/contracts to choose from that met their needs (both 63); and they trusted the information and advice from sellers (61).

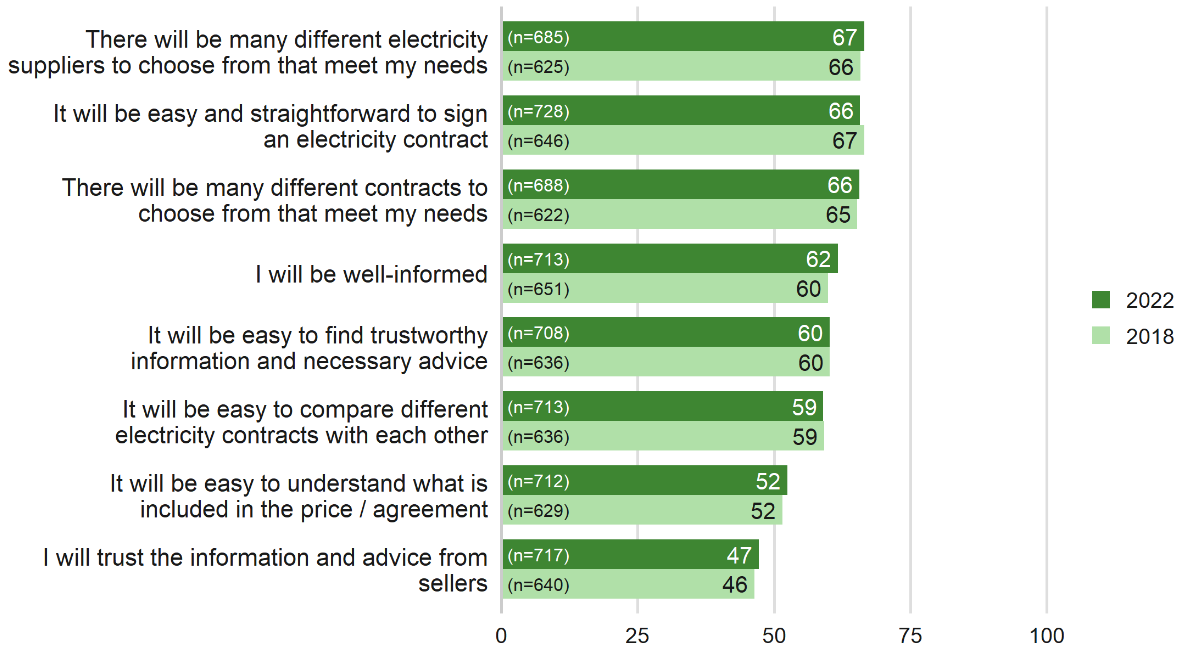
There are no significant differences between 2018 and 2022.

- While respondents of all ages mostly experienced it as easy and straightforward to sign an electricity contract, the average score increases with age – from 66 among those who are under 35 to 78 among those 65 or older. On the other hand, the oldest customers experienced somewhat less that they had many different suppliers (score 58 among respondents 65 or older, compared with 63–68 in the other age groups) and products/contracts (score 59 among respondents 65 or older; 62–67 in other age groups) to choose from that met their needs.
    - One-in-four respondents under 35 (25%), and 18–11 percent in the other age groups, experienced this to a "high extent".
- The *active* customers (77) found it somewhat easier and more straightforward to sign an electricity contract than the *inactive* (72) and *aware* (70) customers did. *Inactive* customers found it somewhat less easy than the others to compare different contracts (60, compared with 66 among *active* customers and 68 among aware customers).
- Customers with a fixed-price contract tend to report better experiences than those with other contracts. They experienced to a greater extent than customers with variable- or spot-price contracts that they were well-informed (average score 71 among respondents with a

fixed-price contract, compared with 65 among those with other contracts), it was easy to understand what was included in the price/agreement (69, compared with 60-61), it was easy to find trustworthy information and necessary advice (69, compared with 62-63), and they could easily compare different electricity contracts with each other (68, compared with 61-63).

Those who have *not* signed a new contract in the past three years were also asked to consider different statements concerning the contract-signing process – given a hypothetical contract choice in the future.

Figure 189: If you in the future would like to choose an electricity contract, to what extent do you agree that… ? Average scores: 0=Not at all and 100=High extent. "Do not know" is excluded. Respondents who have not signed a new electricity contract in the past three years.



Those who have *not* signed a new contract in the past three years express a moderate degree of agreement that if they were to do so in the future, it would be easy and straightforward to sign an electricity contract (average score 66 out of 100), and that there would be many different suppliers (67) and many different contracts (66) to choose from that would meet their needs.

They agree somewhat that they would be well informed (62), that it would be easy to find trustworthy information and necessary advice (60), that and that it would be easy to compare different contracts (59).

They are fairly evenly split when it comes to whether they expect it to be easy to understand what the price/agreement includes (52) – and mostly do *not* expect to trust information and advice from sellers (47).

There are no (significant) differences between 2018 and 2022.

There are clear age differences, however:

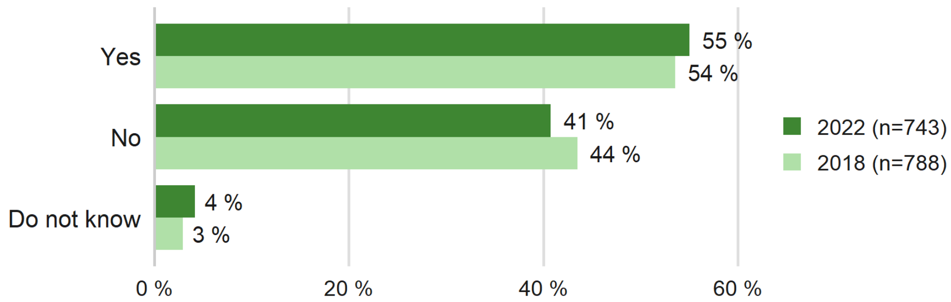
- The oldest respondents (65 or older) disagree the most strongly with the statement that they will trust information from sellers (average score 38, compared to 47–51 among younger respondents). Customers over 65 also *disagree* that it will be easy to understand what is included in the price/agreement (average score 42), while the youngest (under 35) tend to *agree* with this (average score 60). Those in the middle are about evenly split (scores are 53–55 between the ages of 35 and 64).
- Moreover, respondents who are 65 or older *agree less* that it will be easy and straightforward to sign an electricity contract (58, compared to 67–69); that there will be many different contracts to choose from (60, compared to 66 –68); and they will be well-informed (55, compared to 62–65).
- Finally, the youngest respondents expect it to be fairly easy to compare different electricity contracts and to find trustworthy information and necessary advice (average scores 66 and 64, respectively, among respondents under 35), whereas the oldest are evenly divided on this (average scores 50 and 52, respectively, among those who are 65 or older).

Comparison tools

The respondents were also asked to consider different questions regarding comparison tools.

Those who had signed a contract in the past three years were asked if they had visited an online comparison tool:

Figure 190: When you signed/compared your current electricity contract, did you visit an online comparison tool? Respondents who have signed a new contract in the past three years.

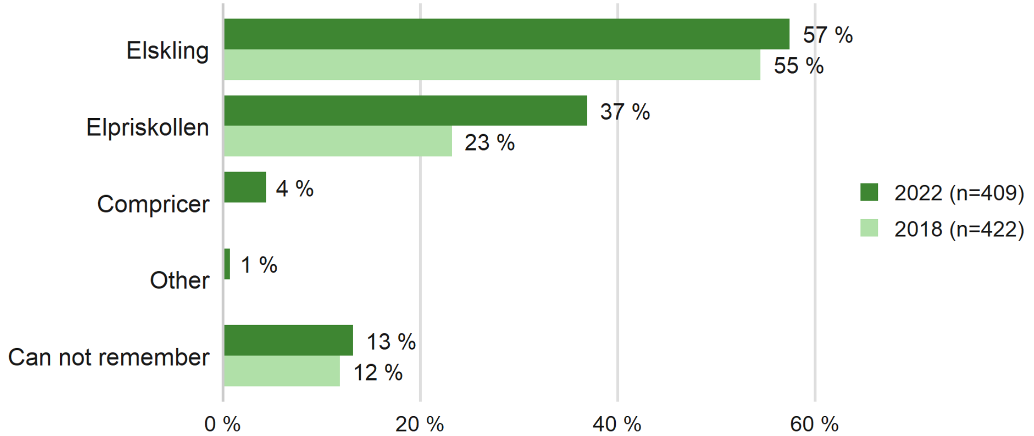


Fifty-five percent of the Swedish electricity customers who signed or compared their electricity contract in the past three years visited an online comparison tool when they signed/compared their current contract. 41 percent did not use such a tool, while four percent say that they do not know.

- More *aware* customers visited a comparison tool (76%, compared to 54% of *active* and 45% of *inactive* customers).
- There is an inverse relationship between age and the share who visited a comparison tool, ranging from 61 percent of respondents under 35 to 49 percent of those 65 or older.

Those who had visited a comparison tool were asked to name the tool(s) they had visited.

Figure 191: What comparison tool(s) did you visit? Multiple answers possible. Respondents who visited a comparison tool when they signed their current contract.



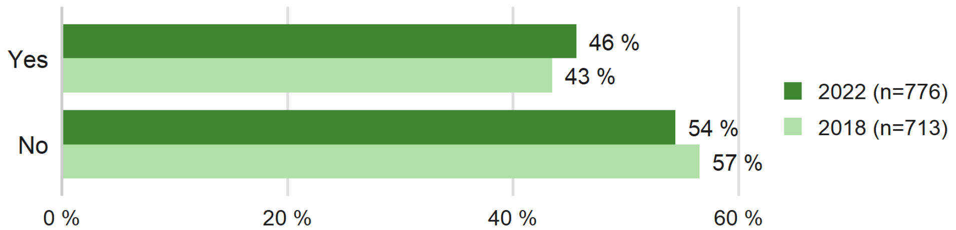
Fifty-seven percent had visited "Elskling", while 37 percent had visited "Elpriskollen" – which is the price comparison tool managed by the Swedish energy regulatory authority. Between one and four percent named other comparison tools, and 12 percent cannot remember which comparison tool they visited.

Compared with 2018, a higher share had visited "Elpriskollen" in 2022.

- The share who visited "Elskling" is lowest among those aged 65 or older (44%, compared to 57–64% among younger respondents).

The electricity customers who had *not* signed a contract in at least three years were also asked about comparison tools.

Figure 192: Do you know any of any online comparison tools for electricity contracts? Respondents who have not signed a new contract in the past three years.

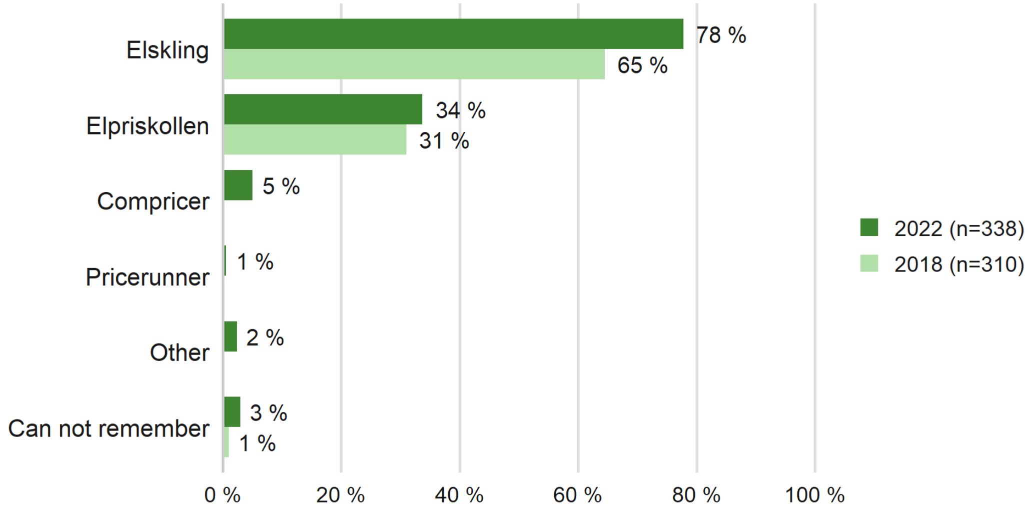


Forty-six percent of those who had not signed a new contract in more than three years *know of* one or more online comparison tools for electricity contracts. The majority, however, *do not* know of any such tools (54%). There is no significant difference between 2018 and 2022.

- More of the *aware* than the *inactive* customers know of any online comparison tools (69%, compared to 42%).
- More respondents with variable-price contracts know of such tools, compared with those with fixed-price contracts (51% and 39%, respectively).

Those who know of online comparison tools for electricity contracts were asked which comparison tools they had visited online.

Figure 193: What comparison tool(s) have you visited online? Multiple answers possible. Respondents who have not signed a new contract in the past three years and who say they know of an online comparison tool.



More than three-quarters of these respondents had visited “Elskling” (78%), and 34 percent had visited “Elpriskollen”. Between one and five percent name other comparison tools.

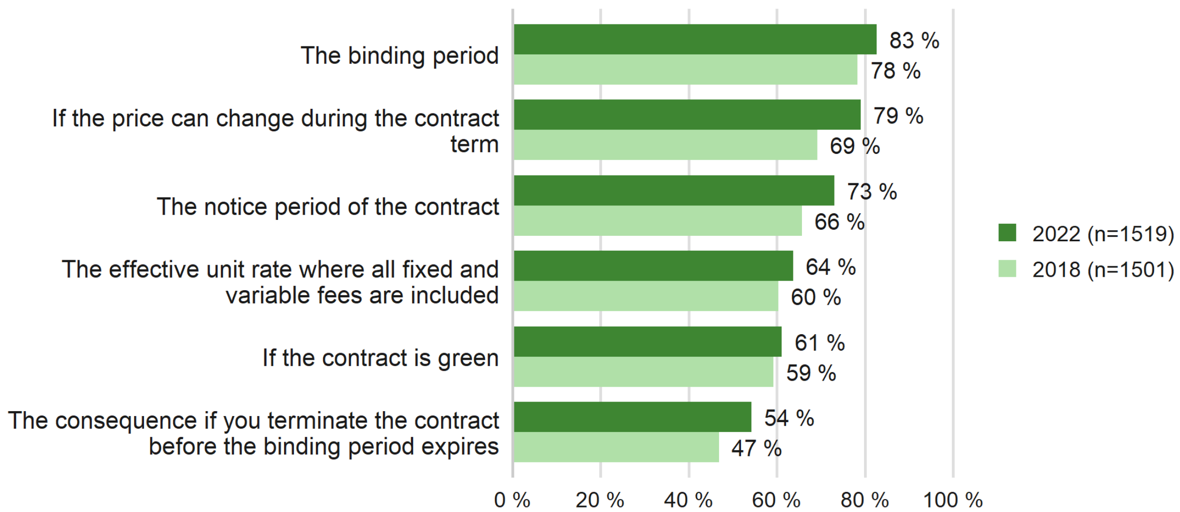
Compared with 2018, a higher share had visited “Elpriskollen”.

- The share who visited “Elskling” is lowest among the oldest respondents (63% among those 65 or older, compared with 80–83% in the younger age groups) – while the share who visited “Elpriskollen” is highest in that group (47% of those 65 or older; 29–32% of others).
- More *aware* than *inactive* customers had visited “Elpriskollen” (47% and 30%, respectively).

Terms of contract

The respondents were asked about their current electricity contract and how well they know the terms of their contract.

Figure 194: When you think of your current electricity contract, are you aware of …? Shares who answered “Yes”.



Approximately four-in-five Swedish electricity customers are aware of their contract’s binding period (83%) and whether the price can change during the contract term (79%). Almost three-in-four (73%)

are aware of the notice period of the contract, 64 percent are aware of the effective unit rate, and 61 percent are aware of whether the contract is green. A little more than half know what happens if they terminate their contract before the binding period expires (54%).

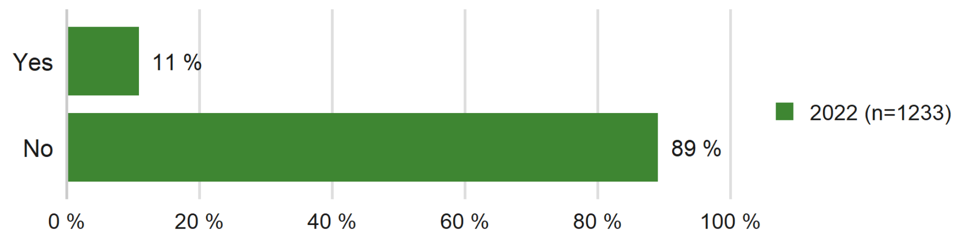
Compared with 2018, significantly more respondents say in 2022 that they are aware of the contract's binding and notice periods, whether the price can change during the contract term, and the consequence if they terminate the contract before the binding period expires.

- More of the oldest respondents are aware of their contract's binding period (ranging from 89% of those who are 65 or older to 76% of respondents under 35) and notice period (ranging from 79% to 69%).
- The shares who are aware of whether the price can change during the contract term are highest among customers who have variable- or spot-price contracts (both 89%), while the share is lowest among those who have a fixed-price contract (68%).
    - Comparatively more of the customers with a spot contract are aware of the consequence of terminating the contract before it expires (71%, compared to 54–57%) and whether the contract is green (76%, compared to 59–64%).
    - Customers with a fixed-price contract are somewhat more aware of their binding period (89%, compared to 82–84%).
- *Inactive* customers are generally less aware of the terms of their current electricity contract, compared to *active* and *aware* customers.

Negative experiences and complaints

The 2022 version of the survey also included a section exploring customers' *negative* experiences with the electricity market. Respondents who had (ever) signed a contract were asked if they had experienced problems with their new supplier after signing, and whether they had made a complaint regarding their problem.

Figure 195: After you signed your current contract, did you experience problems with your new electricity supplier? Respondents who have ever signed a contract.

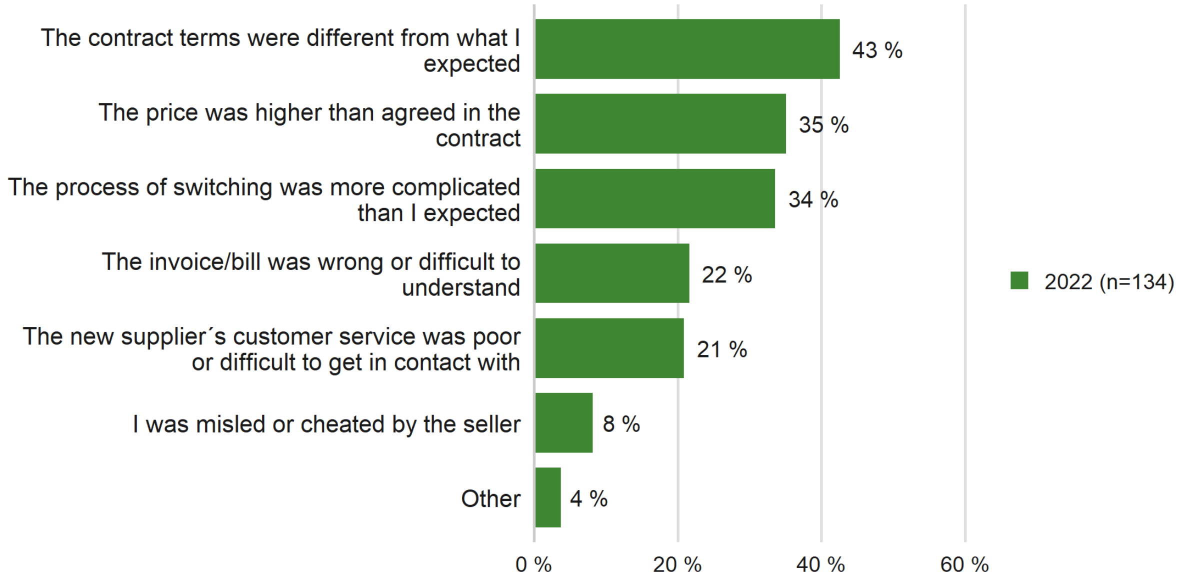


Around one-in-ten respondents who have signed an electricity contract experienced problems with their new supplier after signing their *current* contract (11%).

- Almost one-quarter of respondents under 35 years old (23%), and 15 percent of those aged 35–49, experienced problems with their supplier. In comparison, only five percent of 50–64-year-olds, and three percent of those who are 65 years old or older, experienced such problems.
- A larger share of the *aware* customers had experienced problems (21%, compared to 8% of *inactive* and 10% of *active* customers).
- Compared with other customers, a somewhat lower share of those with the *lowest* electricity consumption (<5,000 kwh per year) had experienced problems (8%, compared to 13–17%).

Those who had experienced problems with their new electricity supplier were asked what *kind* of problem they experienced.

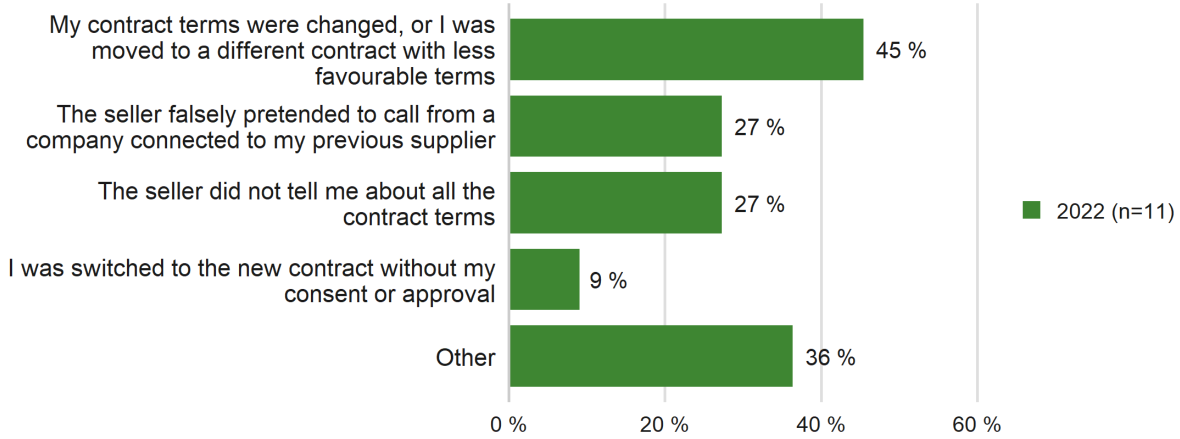
Figure 196: What kind of problem did you experience? Multiple answers possible. Respondents who experienced problems with their new electricity supplier.



Roughly six-in-ten of those who experienced problems with their new supplier say that the contract terms were different from what they expected (43%), while around one-in-three say the price was higher than agreed in the contract (35%) or that the switching process was more complicated than they expected (34%). One-in-five say that the invoice/bill was wrong or difficult to understand (22%) or that the new supplier's customer service was poor or difficult to get in contact with (21%). Eight percent say that they were misled or cheated by the seller, and four percent cite other problems.

Those who responded that they were misled or cheated by the seller were asked how this happened.

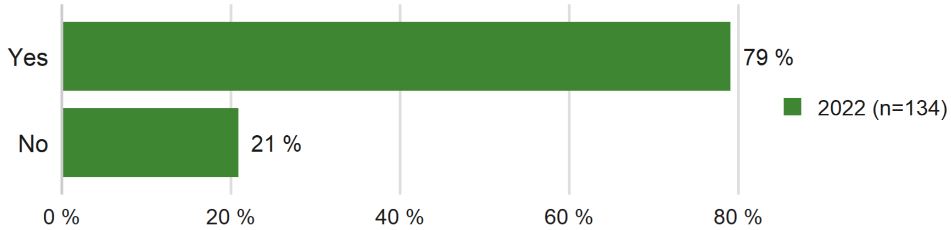
Figure 197: In what way were you misled or cheated by the seller? Multiple answers possible. Respondents who were misled or cheated by the seller.



The most common responses among those who claim to be misled or cheated by the seller are that their contract terms were changed, the seller pretended to call from a company related to the previous supplier, or they were moved to a different contract with less favorable terms. **Note that only 11 respondents were asked this question**.

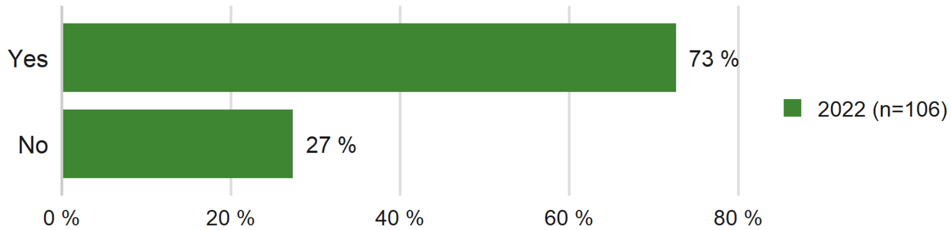
Customers who had experienced problems with their new electricity supplier were also asked whether they had made a complaint regarding their problem.

Figure 198: Did you make a complaint regarding your problem? Respondents who experienced problems with their new electricity supplier.



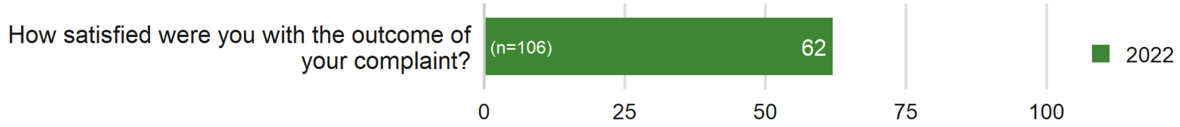
Eight-in-ten respondents who experienced problems with their new contract made a complaint regarding their problem (79%). Those who made a complaint were asked if the problem got fixed due to their complaint – and how satisfied they were with the outcome.

Figure 199: Did your problem get fixed due to your complaint? Respondents who experienced problems with their new electricity supplier and have complained.



Almost three-in-four respond that the problem got fixed due to their complaint (73%).

Figure 200: How satisfied were you with the outcome of your complaint? Average scores: 0=Very dissatisfied and 100=Very satisfied. “Do not know” is excluded. Respondents who experienced problems with their new electricity supplier and complained.



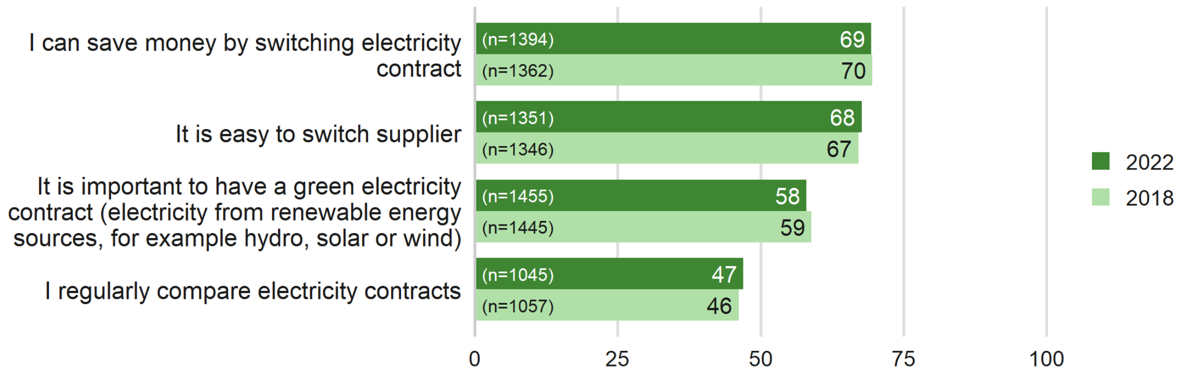
When it comes to satisfaction with the outcome of the complaint, the results show a moderate degree of satisfaction (score of 62 on a scale from 0 to 100). 21 percent say that they were dissatisfied, while 46 percent say that they were satisfied.

- There is a tendency that younger respondents were more satisfied with the outcome of their complaint, compared with older respondents (those over 50).

The Swedish customers’ attitudes towards the electricity market

The respondents were asked to consider different statements concerning the electricity market.

Figure 201: To what extent do you agree with the following statements …? Average score: 0=Fully disagree and 100=Fully agree. “Do not know” is excluded. Respondents who had not compared their current contract were not asked whether they regularly compare electricity contracts.



The Swedish customers agree to a moderate extent that they can save money by switching contract (69) and that it is easy to switch supplier (68). They also agree somewhat that it is important to have a green electricity contract (58) – but mostly *disagree* that they regularly compare contracts (47). There are no significant differences between 2018 and 2022.

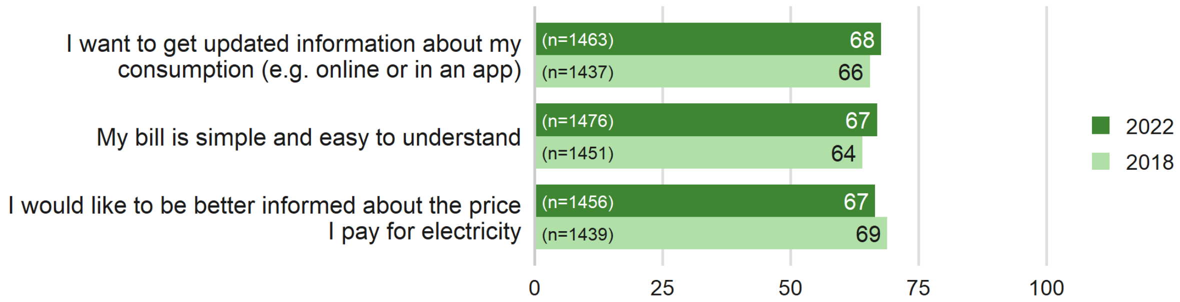
- The youngest agree the most that it is important to have a green contract. The average score is 63 among respondents under 35, while it is between 55 and 58 in the other age groups.
- The oldest customers agree only somewhat that they can save money by switching contracts (average score 64 among those 65 or older). In the younger age groups, there is a fair amount of agreement with this statement (scores between 69 and 72).
- Unlike the other respondents, those aged 35–49 do not *disagree* that they regularly compare contracts (52, compared with 44–46 in the other age groups).
- The *active* customers agree more that it is easy to switch suppliers (76), compared with the *aware* (67) and *inactive* (65) customers. *Active* and *aware* customers agree more that they can save money by switching contracts (78 and 74, respectively, compared with 65 among the *inactive* customers).

- *Aware* customers tend to agree that they regularly compare contracts (56). *Active* customers neither agree nor disagree (51), while *inactive* customers disagree with this (40).
- Those who live in a house are less inclined to disagree that comparing contracts is something they do regularly, compared with those who live in an apartment (51 and 44, respectively).
- There is an association between the respondents' annual kWh use the degree to which they agree that they regularly compare contracts – from a score of 44 among those who use less than 5,000 kWh per year to a score of 61 among those who use more than 20,000 kWh per year. Moreover, those with the lowest electricity consumption tend to agree less strongly that they can save money by switching contracts (66 among those who use less than 5,000 kWh per year, compared to 70-75 among other respondents).

Billing and information

The respondents were asked to consider different statements concerning billing and information.

Figure 202: To what extent do you agree with the following statements …? Average score: 0=Fully disagree and 100=Fully agree. "Do not know" is excluded.



The Swedish electricity customers agree to a moderate extent that their bill is simple and easy to understand, that they would like to be better informed about the price they pay for electricity, and that they want updated information about their consumption (e.g., online or in an app) (average scores 67–68).

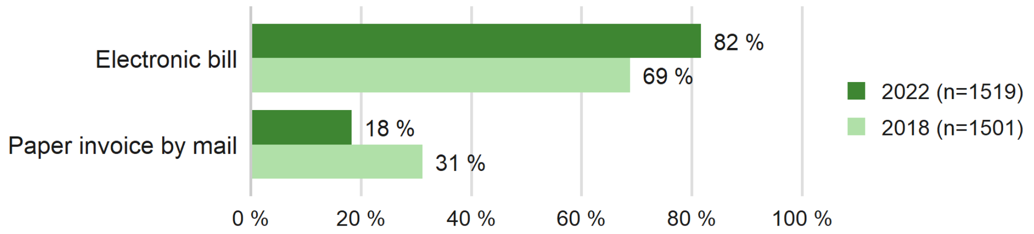
Compared with 2018, there are no significant changes to the average scores. Looking at the individual response categories, however, a lower share *fully agree* with the statement "I would like to be better informed about the price I pay for electricity" in 2022 (down from 29% to 25%). The share of *fully disagree*-responses to the statement "My bill is simple and easy to understand" has decreased from 9 percent to 6 percent.

- The youngest customers agree the most more that they would like to be better informed about the price they pay for electricity (ranging from a score of 71 among respondents under 35 to 62 among those who are 65 or older).
- Compared with the other customer types, *active* customers agree more that their bill is simple and easy to understand (average score 72, compared with 67-65).
- *Aware* and *active* customers agree the most that they would like to be better informed about the price they pay for electricity (scores are 73 among *aware,* 70 among *active*, and 64 among *inactive* customers), and that they want updated information about their consumption (e.g., online or in an app) (75 among *aware,* 70 among *active*, and 65 among *inactive* customers).
- There is an association between annual electricity consumption and extent of agreement with the statement "I want updated information about my consumption (e.g., online or in an

app)", ranging from a score of 66 among those who use less than 5,000 kWh per year to 76 among those whose annual consumption is at least 20,000 kWh.

The electricity customers were also given different questions about their electricity bill; about how they receive it, and what information they read on the bill.

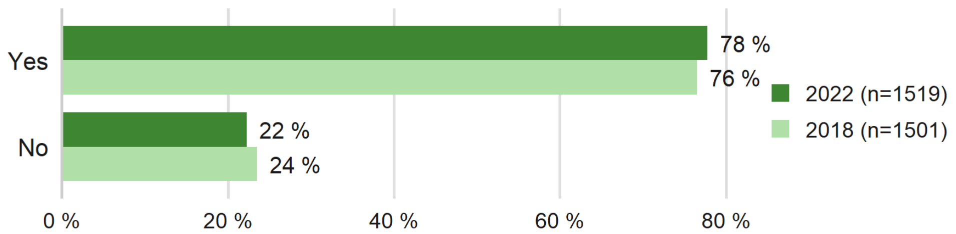
Figure 203: How do you receive your electricity bill?



Eighty-two percent of the Swedish electricity customers receive their bill electronically. 18 percent receive it as a paper invoice by mail. While electronic bills have become considerably more common since 2018, almost one-in-five Swedish customers still receive paper bills in 2022.

- The share of customers who receive their bill as a paper invoice by mail is highest among the *inactive* (21%) and lowest among the *active* (10%) customers. 18 percent of *aware* customers receive paper electricity bills.

Figure 204: Do you read the information presented on your electricity bill?

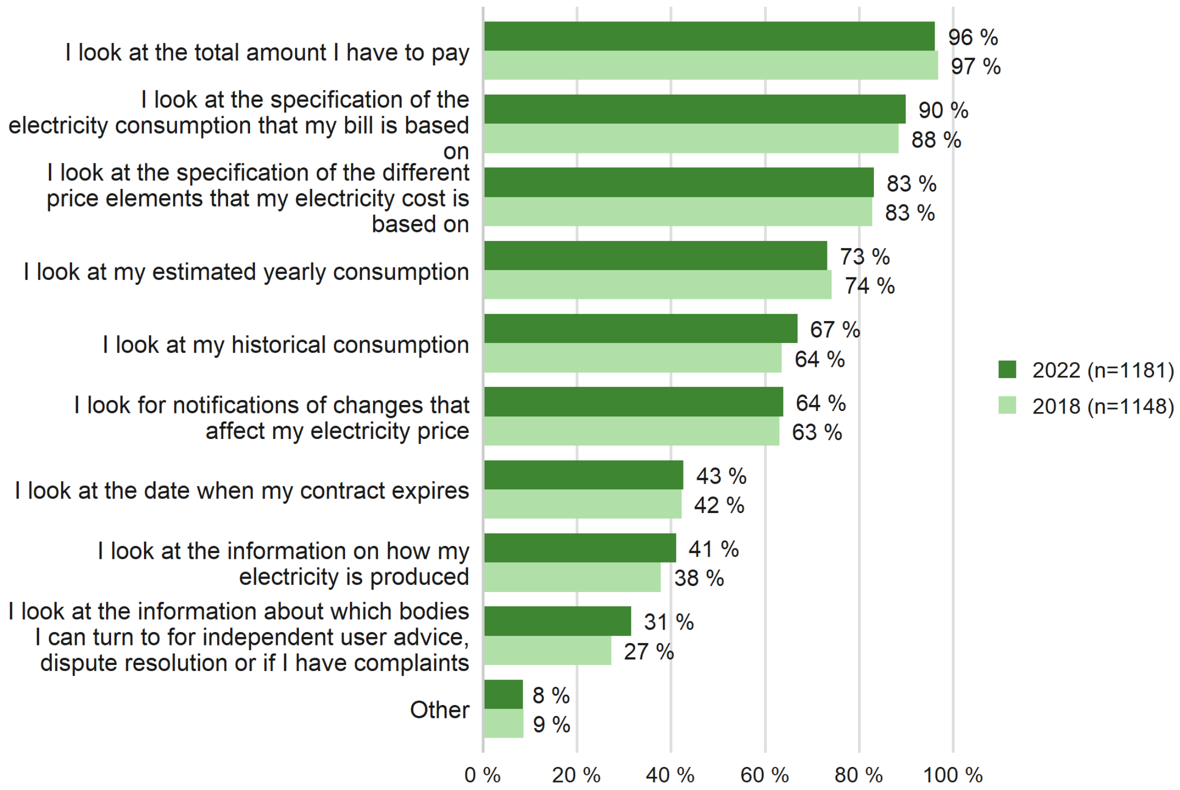


Seventy-eight percent say that they read the information presented on their electricity bill. There is no significant difference between 2018 and 2022.

- Around three-in-four Swedish respondents under 50 years old, and around four-in-five of those who are 50 or older, say that they read the information presented on their electricity bill. The share is highest among respondents who are 65 or older (83%).
- Larger shares of the *aware* (90%) and *active* (86%) customers read their electricity bill, compared with the *inactive* customers (72%).
- Ninety percent of those with a spot-price contract, 81 percent of those with a fixed-price contract, and 77 percent of those with a variable-price contract, read their electricity bill.
- A larger share of those who live in a house read the information on their bill (83%), compared with those who live in an apartment (74%).

The electricity customers who reported that they read the information presented on the electricity bill were asked which items of this information they read.

Figure 205: What information do you read on your electricity bill? Respondents who say they read their bill. Shares who answer, "Yes".



Almost everyone looks at the total amount they have to pay (96%), and nine-in-ten look at the specification of the electricity consumption on which their bill is based (90%). Roughly four-in-five look at the specification of the different price elements on their bill (83%).

Almost three-in-four look at their estimated yearly consumption (73%), while around two-in-three look at their historical consumption (67%) and/or look for notifications of changes that affect their electricity price (64%).

Around four-in-ten look at the date when their contract expires (43%) and/or the information on how their electricity is produced (41%).

Three-in-ten look at the information about which bodies they can turn to for independent user advice, dispute resolution, or if they have complaints (31%). Eight percent look at other information.

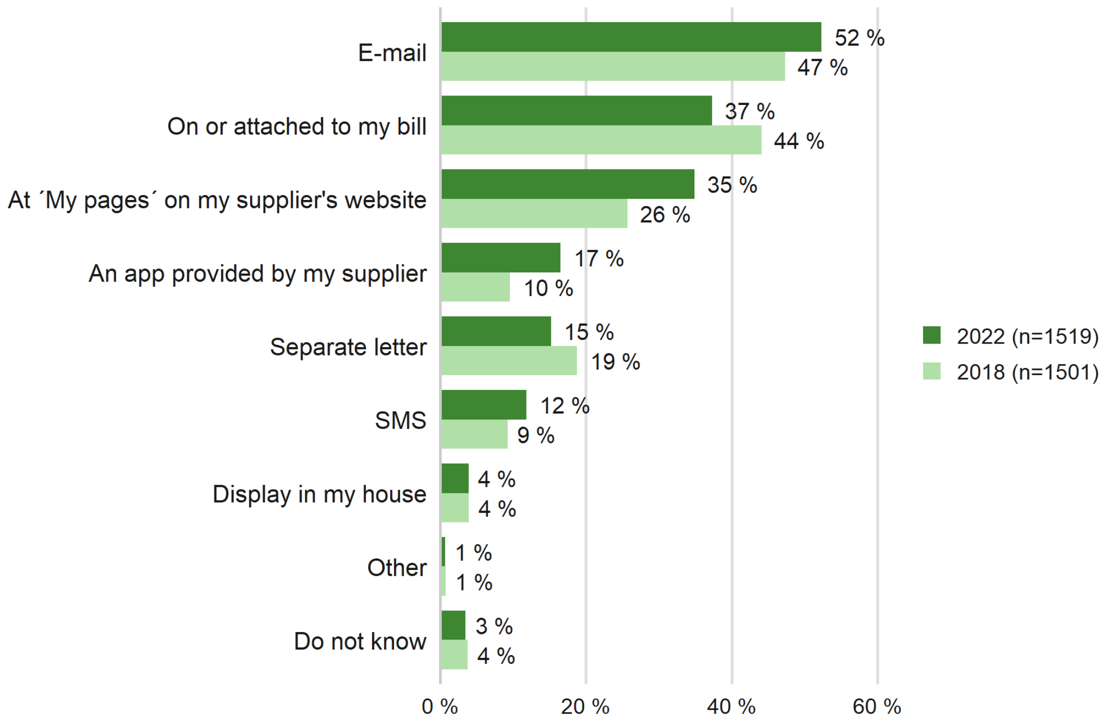
There are no significant differences between 2018 and 2022.

- Customers under the age of 35 generally read fewer items of information than older customers, and those in the oldest age group (65 or older) are the most prolific. Readership shares are significantly lower among those under 35, and significantly higher among customers aged 65 or older, for: Total payable amount (from 92% to 99%), specification of the different price elements (from 73% to 92%), specification of electricity consumption (from 84% to 95%) and estimated yearly consumption (from 61% to 83%).
    - On the other hand, the *youngest* customers are the most inclined to read information about independent user advice bodies – which the oldest ones are the least inclined to do (the share ranges from 40% of those under 35 to 23% of those who are 65 or older).

- There are some differences between the customer types – and *inactive* customers tend to read the least of the information on their bill. The biggest differences are in the shares who say that they look at:
    - The date when their contract expires: Half the *active* and *aware* customers (50–51%), and 37 percent of the *inactive* customers, look at this information.
    - Historical consumption: 76 percent of *active*, 68 percent of *aware,* and 63 percent of *inactive* customers.
    - Estimated yearly consumption: 81 percent of *aware,* 76 percent of *active,* and 70 percent of *inactive* customers.
    - Moreover, about the same shares of *aware* and *inactive* customers look at the specification of the different price elements of their bill (82–81%), while the share is 89 percent among *active* customers.
- More customers with a fixed-price contract look at the date when their contract expires (54%), compared with those with a spot- or variable-price contract (43% and 35%, respectively).

In conclusion, all respondents were asked how they prefer to get information from their electricity supplier.

Figure 206: How do you prefer to get information from your electricity supplier? Multiple answers possible.



Fifty-two percent prefer to get information from their electricity supplier via e-mail, and 37 percent want information to be delivered on, or attached to, their bill. 35 percent prefer “My pages” on their supplier’s website.

Seventeen percent want their information in an app provided by their supplier, and 15 percent prefer a separate letter. Somewhat fewer (12%) want information on SMS, and only four percent would prefer to get information from their electricity supplier on a display in their house.

One percent of the respondents prefer other information channels. Four percent answer, “do not know”.

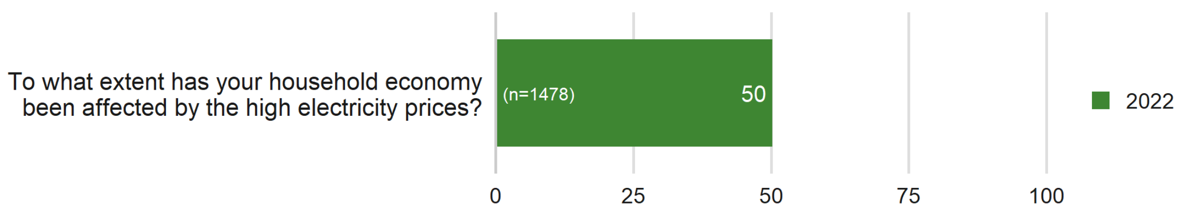
Compared with 2018, a significantly lower share of the Swedish customers prefer to get information on or attached to their bill (44% in 2018 and 37% in 2022), while more of the customers now prefer ‘My pages’ on their supplier’s website (35%; up from 26% in 2018) and/or an app provided by their supplier (17%; up from 10%).

- The share who want information on or attached to their bill is highest among respondents who are 65 or older (46%, compared with 40% of 50–64-year-olds and 33–31% of those under 50). Conversely, there is an inverse relationship between age and the shares who want their information in an app (from 22% of those under 35 to 8% of those who are 65 or older), via SMS (from 15% to 9%) and/or on a display in their house (From 8% to 1%).
- *Inactive* customers are less interested in getting their information in an app (14%), compared with *active* and *aware* customers (both 21%). There is also a lower share of *inactive* customers who prefer e-mail (49%, compared to 58% of other customers). The share of respondents who want information in a separate letter is highest among *aware* customers (21%, compared to 15% of *inactive* and 10% of *active* customers).
    - Five percent of the *inactive* customers do not know how they prefer to get information from their electricity supplier (2–1% of other customers).
- There are some differences between those who get their electricity bills electronically and those who get paper bills:
    - Customers whose electricity bill is currently a paper bill are more inclined to say that they want information on or attached to their bill (45%, compared with 36% of customers with an electronic bill) or in a separate letter (30%, compared with 12%).
    - Customers with a paper bill are *less* inclined to want information via e-mail (33% of those with a paper bill and 57% of those with an electronic bill), “My pages” (27% and 37%), and/or in an app (9% and 18%).
- A larger share of customers with spot contracts want information in an app (35%), compared with those who have fixed- or variable-price contracts (both 16%).

The price shock

In 2022, two questions were added to the questionnaire to address the issue of extraordinarily high electricity prices. The respondents were asked to evaluate the impact of increased electricity prices on their household economy – and to reflect on whether the high prices would influence their future choice of electricity contract.

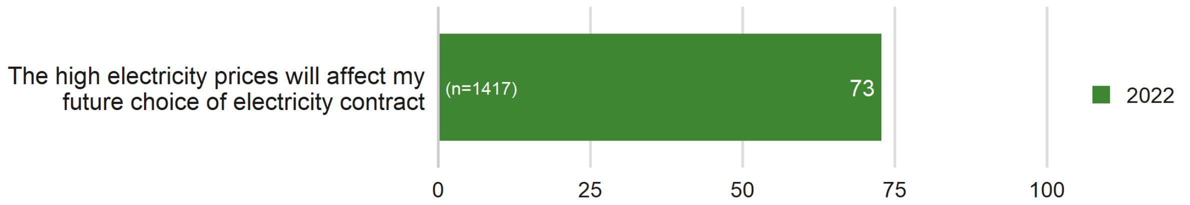
Figure 207: To what extent has your household economy been affected by the high electricity prices? Average scores 0=Not at all and 100=Very high extent. “Do not know” is excluded.



The Swedish respondents are about evenly split regarding the extent to which high electricity prices have affected their household economy (average score 50).

- Older customers report that their economy has been affected to a lower extent than do younger customers.
    - Average scores are 55 among respondents under 35, 57 among 35–49-year-olds, 47 among 50–64-year-olds, and only 42 among those who are 65 or older.
- The high prices have affected the household economy of respondents who have fixed-price contracts to a lower extent (45), compared with those who have variable- (54) or spot-price contracts (61).
- With an average score of 60, *aware* customers have been affected by high electricity prices to a higher extent than *active* and *inactive* customers (50 and 48, respectively).
- Those who have a low annual kWh use are less affected by the high energy prices than those who use more electricity: Average scores range from 44 among those who use less than 5,000 kWh per year to 61 among those who use at least 20,000 kWh.

Figure 208: To what extent do you agree that the high electricity prices will affect your future choice of electricity contract? Average scores 0=Fully disagree and 100=Fully agree. "Do not know" is excluded.



The Swedish customers express a fairly high level of agreement that the high electricity prices will affect their future choice of electricity contract (average score 73).

Three percent of the respondents fully disagree, and four percent partly disagree. 26 percent choose the mid- ("neutral") point of the scale. 24 percent party agree, and the largest share, 36 percent, fully agree with the statement. 7 percent answer, "do not know".

- *Aware* (80, high extent) and *active* (78, high extent) customers tend to agree more with this statement than *inactive* customers (69, moderate extent).
- Those with the lowest annual kWh use express a somewhat lower level of agreement than other respondents (average score 69 among those who use less than 5,000 kWh annually, compared with 74–77 in the other kWh-use ranges).
- There is an association between the extent to which the respondents have been affected by the high prices and how strongly they agree that the high prices will affect their future choice of electricity contract. The average score ranges from 65 among those who respond that their household economy has been affected to a low extent or not at all to 81 among those who say that their household economy has been affected to a high or very high extent.

List of figures