



Methodological challenges in qualitative energy poverty research

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EXTENDED ABSTRACT

Investigating energy poverty through qualitative interviews of affected households is a widely spread method to learn about the lived experiences of households, their practices, behaviours, coping strategies as well as their life trajectories when they are unable “to attain a socially and materially necessitated level of domestic energy services”(1). Still, the methodological challenges associated with qualitative research involving energy poor households have not been analysed in a systematic manner. Our research aims to fill this gap by reviewing a set of 23 qualitative studies performed in different European countries and in Australia.

Multiple challenges to qualitative research on energy poor households

Energy poverty is difficult to investigate in a methodologically sound manner for several reasons. Firstly, it is commonly admitted that energy poverty may be rooted in different or a combination of causes and circumstances, which leads to the existence of a set of vulnerabilities at the household level. As these vulnerabilities combine with each other in many possible ways, identifying energy poor households requires some effort from qualitative researchers. Secondly, energy poverty-related difficulties are often de facto hidden: they occur inside the home and are not necessarily revealed by households who might be ashamed of their living conditions, or who consider their situation as “normal” rather than a situation of energy poverty. Moreover, researchers might have limited visibility on peoples’ difficulties when they are not in contact with authorities, or when they are made invisible by the design of relief instruments. Thirdly, energy poverty can be difficult to investigate because some of the affected households own a very low degree of trust in institutions and in society. Hence, accessing them without taking these aspects in consideration might not be fully appropriate. Moreover, the reality on the ground presents a diversity of situations: some groups might raise specific challenges when it comes to investigating their lived experiences. This is for example the case for people living in marginalized communities, for people who are facing health conditions, for young adults or for children. Therefore, choices regarding the method of selection of interviewees, the context of information collection, and the information that is provided to interviewees will have an impact on the outcomes of their research. Other questions, like researchers’ subjectivity in the perception of situations of energy poverty, or the interpretation of discourses of energy poor households also deserve to be raised.

Method

To better understand these challenges, we have first conducted a systematic literature search on qualitative energy poverty analyses over the period from 2000 to 2021, focusing on the following geographical areas: the EU and the UK, the entire former Yugoslavian region, Turkey, Eastern Partnership Countries, EEA

¹ Bouzarovski, S., & Petrova, S. (2015). A global perspective on domestic energy deprivation: Overcoming the energy poverty–fuel poverty binary. *Energy Research & Social Science*, 10, 31-40.

Countries, USA, Canada, Australia, and New Zealand. Within this literature, we have then selected an exploratory sample of 23 studies which include academic articles, reports and doctoral theses published between 2010 and 2021. In terms of geographic coverage, our sample includes studies on Western European cases (UK, France, Belgium, Germany and Austria), but also on studies from Southern Europe (Greece) and Eastern Europe (North Macedonia, Poland and Czechia), and from Australia. We analysed the content of these research outputs using the NVIVO 12 software, focusing on their methodological aspects.

Results

Several challenges have been discussed in the research outputs we analysed. They relate to (1) the difficulty to adequately identify energy poor households and their problems, (2) the difficulty to constitute a meaningful sample of interviewees, (3) the recruitment and involvement of energy poor households in such research projects and (4) the difficulties to deal with a fragile population. **(1) The difficulty to adequately identify energy poor households and their problems** stems from the fact that energy poverty is multidimensional, while official definitions often focus on a limited number of factors like low incomes or housing conditions. When researchers aim at identifying households who face more specific difficulties, they generally opt for more targeted, but also more intuitive approaches. It appears that, to identify energy poor people, looking only at incomes or at housing conditions is not sufficient. In practice, researchers often use energy poverty proxies to assess which households to include in their research. **(2) The difficulty to constitute a meaningful sample of interviewees.** One difficulty lies in the constitution of a sample of interviewees that is representative of the population: often, women tended to be overrepresented, while certain groups, for example students, or “non-typical” households, like people who share a rented flat, or households composed of different generations are under-represented. More generally, the “invisible” energy poor, for example households who restrict their energy consumption, or those households who are not identified by institutions as being in need require a special effort from researchers to be included in their studies. **(3) The recruitment and involvement of energy poor households in qualitative research projects** raises issues such as how to find the energy poor, and how to convince them to accept being interviewed. Different techniques are used for the recruitment of participants. They include the use of intermediaries such as social workers or charities who already know the people, or snowballing techniques. Incentives to participate can be monetary, but they are frequently of a non-monetary, symbolic nature. Participation can be improved thanks to clear ethical rules, guarantees regarding participants’ anonymity and by allowing them to withdraw from the project at any time. **(4) The difficulties to deal with a fragile population** are manifold. The vulnerability factors of energy poor people include not only low incomes, poor housing conditions or ill health. They also include the fact that people experience their daily lives as highly uncertain, this situation being associated with emotions such as shame for their living conditions or for lacking language skills, the fear of being judged and a lack of hope that their lives might change in a positive manner. Therefore, researchers need to be aware of the importance of establishing relations that create trust, which can imply a relational dimension of the interaction between researcher and interviewees over time.

Conclusion

Investigating the lived experiences of energy poor households through qualitative methods is essential as it helps understanding how people who are – and feel – vulnerable interact with the space in which they live – their home – and with the various supply systems, arrangements (including markets, contractual arrangements, and administrative rules) and technical devices to be able to access energy services. It also helps understanding the consequences of people not being able to access sufficient levels of energy services. We expect our contribution to help future research initiatives in the design and implementation of their qualitative analyses involving energy poor households, by taking into account in their projects the specificities of energy poor households and the challenges we identified.