



Domestic Consumer Insight Tracker Survey

Draft report prepared for the Utility Regulator

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1. Key insights: an executive summary

Background

The Utility Regulator in Northern Ireland commissioned Perceptive Insight Market Research to carry out a statistically robust and repeatable survey with domestic electricity and gas consumers in Northern Ireland. The aim of the study is to provide data for planning and activity under the Utility Regulator's Corporate Strategy 2019 – 2024 and Consumer Protection Programme in line with best practice.

This is a follow-up survey to the Domestic Trackers conducted in 2019, 2021, and 2022, and comparisons with those studies have been made throughout this report, where appropriate.

Methodology

A telephone methodology was used to conduct the surveys. In total, 1502 interviews were completed, which were representative of the household population in Northern Ireland. Interviewing took place during October 2023 and November 2023 with each interview taking, on average, 10 to 15 minutes to complete. Interviewing was carried out in compliance with UK GDPR and the Market Research Society Code of Conduct.

Key findings and recommendations

Heating types and current energy supplier

- 59% of respondents use oil to heat their homes, followed by 36% who have mains gas installed.
- 3% of domestic consumers¹ have intentions to switch their home heating method in the next three years.
- Almost all (95%) domestic consumers are aware of who their electricity supplier is. Most common were Power NI (51%) and SSE (23%).
- 94% of those with mains gas were able to recall who their gas supplier is. Most common were SSE (58%) then Firmus (40%).
- 26% had installed energy efficiency measures in their home within the last three years, compared to 37% in 2022. Of those who had not installed energy efficiency measures over the last three years, 43% said that their home came with them installed already, followed by 34% who had installed them more than three years ago. Loft insulation (69%), cavity wall insulation (47%) and double glazing (20%) were the most common measures implemented.
- 8% of domestic consumers use renewable energy systems or low carbon technologies in their home for heating or electricity.

¹ Where we refer to 'consumers' in the report, we are referring to survey respondents.

Payment

- 43% have electricity bills of at least £100 per month, the same as in 2022 but still notably higher than in 2021 (13%).
- The proportion of respondents paying £150 or more per month for their electricity has increased from 12% to 16%.
- 42% of gas respondents have a monthly spend of at least £100, compared to 48% who reported this in 2022 and 9% in 2021.
- A prepayment meter was the most common method of paying for both electricity (47%) and gas (69%). This represents an increase from 43% (for electricity) and 59% (for gas) in 2022.
- Convenience was the most often cited reason for having a prepayment meter (78% of those with an electricity prepayment meter and 75% of those with a gas prepayment meter).
- Consumers reporting using a prepayment meter to monitor their energy usage has risen from 2022, for both electricity and gas:
 - 33% of electricity consumers (compared to 7% in 2022); and
 - 34% of gas consumers (compared to 5% in 2022).
- The majority of electricity (96%) and gas (97%) consumers who use a prepayment meter indicated that they are content to remain using this method rather than change to alternative payments methods such as direct debit.
- Support has fallen for paying extra on bills for future investment since 2022:
 - 83% of respondents stated that they would be unwilling to pay anything extra on their bill for future investment (compared to 63% in 2022);
 - 12% would pay extra to provide extra help to vulnerable customers (24% in 2022);
 - 9% would pay extra for projects to protect the environment (24% in 2022); and
 - 4% would be willing to pay extra to improve the reliability of the network (13% in 2022).

Interactions with energy suppliers

- Similar proportions reported receiving correspondence from their electricity supplier in the post (38%) and via email or online (38%), while gas customers were more likely to receive correspondence through the post (52%, compared to 19% through email or online).
- There has been a decrease in customer engagement with written communications received from their supplier. 66% of electricity customers reported either glancing at or reading their correspondence in full (compared to 77% in 2022) while 64% of gas consumers reported either glancing at it or reading their correspondence in full (compared to 70% in 2022).
- Of those respondents who had glanced at or read their written correspondence, there has been an increase in understanding of this correspondence. 83% of electricity respondents agreed or strongly agreed that the information was clear and understandable (compared to 73% in 2022). 81% of gas consumers agreed or strongly agreed that the information was clear and understandable (compared to 77% in 2022).
- There has been an increase in consumer trust in their electricity suppliers:
 - 70% of electricity consumers said they trust their supplier to treat them fairly (compared to 63% in 2022); and
 - 61% stated they trusted their supplier to give them a fair price (compared to 52% in 2022).

- A similar pattern can be observed with gas customers:
 - 64% trusted their supplier to treat them fairly (compared to 52% in 2022); and
 - 56% trusted their supplier to give them a fair price (compared to 45% in 2022).
- There has been an increase in consumer satisfaction with overall service from suppliers:
 - 84% of domestic consumers reported satisfaction with their electricity supplier (compared to 74% in 2022); and
 - 82% were satisfied with their gas supplier (compared to 70% in 2022).
- 9% contacted their electricity supplier in the last year for a reason other than making a complaint. The most common reasons for this was; switching their energy contract (33%), payment issues (24%), and querying a bill (23%).
- Of those that made contact; 78% found it easy to get in touch, 83% thought they were listened to, 81% felt they were treated fairly, and 80% said that their electricity supplier was supportive.

Complaint handling

- 4% of electricity and 5% of gas respondents had made a complaint to their electricity or gas supplier in the past year.
- 3% stated that they had wanted to make a complaint to their electricity supplier and 3% to their gas supplier in the past but left it unreported.

Switching

- There was a high level of awareness (97%) of being able to choose between different electricity suppliers amongst respondents:
 - 83% of those consumers agreed that having this choice gives access to better deals;
 - over half (53%) had compared electricity deals to see if they could switch supplier or tariff. This is a slight decrease from 54% in the 2022 Tracker; and
 - 32% of those who have the option to switch between gas suppliers said that they had compared gas deals. This is down from 41% in the 2022 study.
- 50% of electricity consumers and 43% of gas customers were confident that they are on the best energy deal for them.
- 51% of domestic consumers have switched their electricity supplier at least once, an increase from 44% in the 2022 Tracker:
 - 71% have done so within the last three years;
 - In contrast, only 12% of those who have the option had switched gas suppliers.
- Feeling they were overpaying (45%) and reacting to an approach by a doorstep seller (28%) were the main drivers for switching electricity supplier. These indicators are consistent with those observed in the 2022 Tracker.
- 38% of electricity consumers who had switched did so through a doorstep seller, down from 48% in 2022.
- 86% of respondents agreed that they received the deal they were expecting when they switched electricity supplier, although 7% disagreed;
 - 83% reported a positive and 3% a negative experience when they switched.
- 63% of respondents had never switched electricity supplier due to satisfaction with their current service, an increase from 50% in 2022.

- 74% had never switched gas supplier for the same reason, which is consistent with the 2022 Tracker.
- 25% of electricity and 18% of gas customers said they were likely to switch their supplier in the next 12 months.
- Internet access and confidence using the internet appears to influence the likelihood of comparing energy deals and of switching:
 - Almost all (98%) of those with internet access were aware they could choose between electricity suppliers;
 - 58% of those who are confident internet users said they had compared electricity deals compared to 35% who are not confident; and
 - Over half (54%) of those who have internet access had switched electricity supplier at least once in contrast to 17% of those without internet access.

Payment difficulties

- The proportion of respondents who sometimes struggle to pay their electricity bills has decreased from 39% to 33%:
 - The proportion who often or always struggle to pay has remained the same (4%).
- For gas, the proportion of consumers who sometimes struggle to pay has increased from 33% to 36%:
 - However, the proportions who often or always struggle has decreased from 7% to 5%.
- 20% of respondents with a prepayment meter reported that they had run out of money on their meter and had gone without electricity over the past year,
 - These figures are similar to those obtained in 2022, in which 18% with a prepayment meter had gone without electricity.
- 9% of consumers reported that they have had to delay or go without other essentials so that they could pay for electricity, a reduction from 11% in 2022.
- 10% reported delaying or going without other essentials to pay for gas. This is consistent with results from the 2022 Tracker.
- 71% of respondents have reduced their electricity usage over the last year, which represents a decrease from 85% in the 2022 Tracker. 6% had borrowed money to pay their electricity bills, the same as in 2022.
- This was also true for gas customers, with 71% reducing their usage (compared to 87% in 2022) and 10% borrowing money to pay their bill (8% in 2022).

Consumer protections

- Over half (55%) of respondents were aware that energy suppliers have obligations to protect them. This represents an increase from 51% in 2022. 43% were not at all aware of these obligations.
- Four in five (80%) respondents who were aware of these obligations said that they would know how to make a complaint if their energy supplier was not meeting these obligations, compared to 68% in 2022.

Support services

- 48% of respondents were not aware of the special services offered by energy companies to consumers who are vulnerable or who require extra support. This compares to 58% who were not aware of these services in 2022.
- 3% were signed up to or had utilised some of the support service offered by energy companies.
- The majority (96%) of those in the high or medium vulnerability group had not signed up to utilise any of the support services offered by energy companies. 93% who have or live with someone who has a disability or illness also had not signed up for any of these support services.
- One third (32%) were aware of the services for vulnerable consumers that NI Water provides, an increase from 18%.

Conclusions and recommendations

Energy costs remain high but stable

The amount that domestic consumers report spending on their electricity and heating has remained consistent with the 2022 findings following a steep increase from the 2021 Tracker. In 2021, 13% of respondents paid £100 or more per month for their electricity, with this rising to 43% in both 2022 and 2023. The 2023 Tracker did however see an increase in the proportion of respondents spending £150 or more per month from 12% in 2022 to 16%. In terms of the amount spent on heating, the proportion of respondents paying at least £100 per month has fallen from 44% in 2022 to 41% (although this is significantly higher than the 12% observed in the 2021 Tracker), while those that are unsure has remained consistent at 21% (compared to 22% in 2022). For gas customers, the proportion of respondents spending £100 or more has decreased from 48% in 2022 to 42% in 2023, however this remains high when compared to 9% in 2021.

The proportion of domestic consumers that ‘sometimes’, ‘often’, or ‘always’ struggle to pay their electricity bills has fallen since 2022. 37% reported they have struggled to keep on top of their electricity bills over the past 12 months, compared to 43% in 2022. However, the proportion that struggled to keep on top of their gas bill has remained consistent with the previous tracker, with 41% reporting they that ‘sometimes’, ‘often’, or ‘always’ struggle to pay their gas bills, compared to 40% in 2022. It should be noted that the proportion of consumers that were ‘always’ able to keep on top of their electricity bills has increased from 56% to 63%, which may explain why fewer domestic consumers reported having to reduce their electricity usage (85% in 2022, compared to 71% in 2023). While the proportion of gas consumers that are ‘always’ able to pay for their bill has remained similar to the previous tracker, there were also fewer respondents that reported having to reduce their gas usage (87% in 2022, compared to 71% in 2023).

Following on from the 2021 and 2022 Trackers there has been a further reduction in support amongst domestic consumers to pay extra on their bill for projects to protect the environment, for providing extra help for vulnerable consumers, and for improving the reliability of the network. This suggests that domestic consumers may struggle to cope with any further increases in their energy bills.

With the incidence of customers self-disconnecting from their energy supply, delaying getting other essentials to pay for energy, and borrowing money to pay energy bills remaining consistent with the 2022 Tracker, it would appear that while most domestic consumers have been able to adapt to higher energy costs, there is a section of customers for whom energy remains unaffordable.

35 to 44 year olds struggling most with rising costs

Respondents aged 35 to 44 were the age group who were most likely to spend at least £100 on their electricity (55%) and on their heating (51%). This may explain why this age group are more likely to struggle with keeping on top of their bills. 47% of respondents in this age group reported that they 'sometimes', 'often' or 'always' struggled to stay on top of their electricity bills over the past 12 months, while half (50%) said this about their gas bills. Respondents aged 35 to 44 were also more likely to have gone without or delayed getting other essentials to pay for their electricity and were joint most likely with those aged under 35 to say they had borrowed money to pay their electricity bills. The findings also suggest those aged 35 to 44 were more likely to have more negative experiences with their energy supplier, with this age group the most likely to: distrust their electricity and gas supplier to treat them fairly and to give them a fair price; to be dissatisfied with the overall service they receive from their gas supplier; and to be not confident that they are on the best electricity or gas deal available.

With 35 to 44 year olds appearing to struggle more with their energy bills and to have had more negative experiences with their energy supplier, there is evidence to suggest they take a more proactive approach to ensuring they are on the best deal for them. Respondents in this age group were among the most likely to have switched their electricity supplier at least four times and to say they were likely or very likely to switch supplier again in the next 12 months. However, while respondents in this age group were most likely to recall in what form they receive correspondence from their electricity supplier, they were also the most likely to report not reading or opening this correspondence.

Most deprived areas have similar energy spend to least deprived areas, but are more likely to show signs of struggling

As seen in the 2022 Tracker, there was little difference in electricity spend between respondents living in the most deprived areas and those living in the least deprived areas (although those in the most deprived areas were less likely to spend £100 or more per month on heating). Despite this, those in the most deprived areas were more likely to: sometimes struggle to pay their electricity bill; have to delay or go without getting essentials to pay for electricity; and borrow money to pay for their electricity and gas bill.

These findings are concerning due to the lack of engagement exhibited by consumers living in these areas, with those in the most deprived areas also more likely to: be unsure about what form they receive correspondence from their energy supplier; and more likely to say they never receive any correspondence or report reading the correspondence. This lack of engagement was also evident in their approach to switching energy supplier. Respondents living in the most deprived areas who had switched electricity supplier were more likely to have done so after being approached by a doorstep seller, while those who had not switched were more likely to say this was because they felt they were on the cheapest option already. While there

were no significant differences in terms of being aware of the choice of electricity suppliers or in comparing electricity deals, it is important that those living in the most deprived areas are aware of the choices available to them, and so the Utility Regulator may wish to explore ways in which engagement with and understanding of energy deals can be increased amongst these consumers.

Prepayment meter customers

The prevalence of prepayment meters in domestic consumers homes has continued to increase. 47% now have a prepayment meter for electricity compared to 39% in 2021 and 43% in 2022, while 69% have a gas prepayment meter, compared to 57% in 2021 and 59% in 2022. The majority of electricity (96%) and gas (97%) consumers who use a prepayment meter are content to remain using this method. Convenience was the most often cited reason for having a prepayment meter for both electricity (78%) and gas (75%) consumers, followed by to monitor energy use (33% for electricity and 34% for gas).

Respondents who have a prepayment meter for electricity or gas were more likely than credit customers to be unaware of in what form they receive their correspondence, more likely to say they have not received any correspondence and less likely to read the correspondence that they received. This is to be expected since consumers with a prepayment meter are likely only to receive an annual statement or notices around tariff increases rather than regular correspondence from their supplier. In contrast, respondents with a prepayment meter were more likely than those who have a credit meter to have switched their electricity or gas suppliers.

Those who have a prepayment meter were more likely to report that they sometimes struggle to pay their electricity or gas bill and were more likely than those with a credit meter to have borrowed money to pay their electricity bills. 20% of respondents with an electricity prepayment meter had run out of money on their meter and gone without electricity in the past year. These difficulties may explain why customers on a prepayment meter are more likely to be 'switchers' as they are more encouraged to find the best deal. Nevertheless, with prepayment customers more likely to be unaware of energy supplier's consumer protection obligations it is important for them to be fully aware of the details of their current contract.

Decreased engagement with correspondence

The Domestic Tracker in 2022 found that consumers were more likely than in the previous Tracker in 2021 to engage with correspondence from their energy suppliers. In 2023, however, the proportion of respondents that could not recall in what form they received correspondence from their energy supplier increased from 11% to 19% for electricity customers, and from 18% to 27% for gas customers. The proportion of respondents that said they glanced at or read their correspondence in full has also fallen from 77% to 66% for electricity customers and from 70% to 64% for gas customers between 2022 and 2023. Those that suggested they had not received any correspondence also increased from 13% to 21% for electricity customers and 22% to 28% for gas customers. With regards to their energy contract and choice of suppliers, 89% of domestic consumers are now completely aware that they have a choice between electricity suppliers, compared to 83% in 2022. Over half (53%) of domestic consumers have also compared their electricity deal, compared to 54% in 2022.

Despite the decreased engagement with energy suppliers, domestic consumers are now more likely to have switched their electricity supplier. 51% have switched electricity supplier at least once, compared to 44% in 2022, with the proportion that switched in the last three years also increasing slightly from 69% to 71%. However, it was electricity switchers that were more likely to show engagement with their supplier. Switchers (those who had switched supplier in the last three years) were more likely to have said they read the last piece of correspondence they received from their supplier and were more likely to have compared electricity deals and agree that having a choice between suppliers gives access to better deals. It may therefore be this greater engagement that has given electricity switchers more motivation to check that they are on the best deal when compared with non-switchers, and so the Utility Regulator may therefore wish to explore ways in which the benefits of increased engagement with energy suppliers can benefit domestic consumers.

Passiveness in rural areas

Rural domestic consumers have continued to have a more static approach to their energy contract, with 43% reporting that they had switched their electricity supplier and 27% of those who had switched doing so within the past year. This compares to 56% of urban customers who have switched and 39% that have done so in the past year. This could be explained by rural customers showing less interest in comparing electricity deals, or by them being less aware that they have a choice of suppliers. However, an alternative explanation could be found when looking at the ways in which domestic consumers switch their supplier. 45% of urban respondents who had switched had done so through a doorstep seller, compared to 24% of rural respondents. Rural consumers could therefore be less aware of their options as they do not receive as many (or any) direct approaches to switch their supplier.

Impact of self-disconnection² on trust and overall satisfaction with energy supplier

20% of domestic customers with a prepayment meter and 3% with a credit meter had gone without electricity at least once over the past year. This appears to have impacted the trust these customers place in their energy supplier. One quarter (26%) of those who had gone without electricity did not trust their supplier to treat them fairly, while one third (33%) did not trust them to provide a fair price. This has also impacted on overall satisfaction, with under one fifth (17%) of those who had been self-disconnected from their supply reporting dissatisfaction with their energy supplier.

In addition to this, 31% of domestic consumers who had experienced self-disconnection were not confident they were on the best electricity deal. These negative perceptions may therefore explain why such respondents were more likely to have switched their electricity supplier. Three in five (58%) of those who had experienced self-disconnection had switched their supplier at least once, compared to half (50%) who had not experienced self-disconnection from their electricity supply. This further emphasises the need for domestic consumers to be aware of how to compare energy deals and determine which deal works best for their current circumstances.

² Self-disconnection refers to respondents who have gone without electricity or gas because the cost was too high or because they had ran out of credit on their prepayment meter.

Awareness of supplier obligations remains low in vulnerable groups

There has been a further increase in the awareness of energy supplier's obligations to protect consumers. In 2021, one quarter (25%) of respondents were completely aware of these obligations, with this increasing to 35% in 2022 and 39% in 2023. There has also been an increase in the proportion of domestic consumers that know how to make a complaint if they felt these obligations were not being met. In 2021, two thirds (66%) said they would know how to go about making such a complaint, with this increasing slightly to 68% in 2022, and then to 80% in 2023. However, several subgroups who would be considered as being potentially vulnerable were more likely to not be aware of these obligations, including:

- Those in the C2DE socioeconomic group compared to those in the ABC1 group;
- Those who privately rent compared to those who own their home;
- Those who have children living in their household compared to those who do not; and
- Those who have self-disconnected from their electricity and gas supply compared to those who have not.

The Utility Regulator may therefore wish to explore the best methods of increasing awareness of energy supplier's obligations amongst these subgroups.

Low awareness and usage of support services aimed at vulnerable consumers

Awareness of support services offered by energy companies has continued to grow. In 2021, one fifth (20%) of respondents knew about the services offered, with this rising to 29% in 2022 and then to over one third (36%) in the 2023 Tracker. However, despite the increased awareness overall, respondents identified as having a disability or illness or as being vulnerable were less likely to be aware, and so uptake of these services remains low amongst those who could potentially avail of them. Only 4 of the 36 respondents, who are dependent or live with someone who is medically dependent on electricity, had signed up for NIE Networks' Critical Care Register (inferences should not be drawn from this finding alone due to the low base), while 99% of those in the high and medium vulnerability group were not signed up to their supplier's Customer Care Register.

The 2023 Tracker also examined awareness and uptake of NI Water's support services, and while awareness about these services has increased from 13% in 2022 to 23%, two thirds (67%) of respondents said they did not know about the services. Again, those respondents who could potentially avail of such services were more likely to be unaware of what they are.

As vulnerable domestic consumers were amongst the most likely respondents to report going without or delaying the purchase of essentials and to have had to borrow money to pay their electricity bills, it is important that they are fully aware of any support services that are available to them to help alleviate any energy pressures they face. Vulnerable customers remain less likely to be internet users or to be confident internet users, and so the Utility Regulator should consider alternative methods of increasing awareness.

Customers without access to the internet may be missing out on vital consumer information

Domestic consumers with no access to or lacking confidence in using the internet continue to show lower engagement with their energy contract, particularly in relation to switching. Those without access to the internet were more likely to be unaware they have a choice of electricity suppliers, while those who were not confident internet users were less likely to indicate confidence in their electricity deal (although there was no significant difference between those who said they were not confident with their deal). Domestic consumers who do not have internet access and who are not confident internet users were less likely to have compared their electricity deal. Therefore, it is not surprising that these customers were also less likely to have switched their electricity supplier while also being more likely to say they would not switch their supplier in the next year.

The lower engagement amongst older domestic consumers may also be explained by their tendency to not use the internet or not be confident internet users. Over one quarter (27%) of those aged 65 and older indicated they do not have any access to the internet, while 46% reported being not confident as an internet user. Along with those who would be considered vulnerable, deprivation was also an indicator of digital inclusion. 11% of those living in the most deprived areas do not have internet access, while 19% did not think of themselves as confident internet users. This compares to 5% of those in the least deprived areas who do not have internet access and 10% who are not confident internet users. It is therefore important for energy suppliers to ensure that those consumers who are digitally excluded are kept fully informed of their energy deal and of any possibilities to improve on it.

Low uptake of renewable energy sources

8% of respondents reported that they use renewables or low carbon technologies (LCTs) for electricity or heating in their home. With regards to heating specifically, fewer than 10 respondents indicated that they use renewable energy sources or LCTs.

The proportion of domestic consumers that have recently incorporated energy efficiency measures has fallen since the previous Tracker. 37% of respondents in 2022 said they had put energy efficiency measures in place in the last three years, with this falling to one quarter (26%) in 2023. However, those who had not installed such measures in the last three years were now more likely to have installed them more than three years ago, suggesting that having these measures in place has now become the norm for many domestic consumers.

2. Introduction

Background

The Utility Regulator is the independent non-ministerial government department responsible for regulating Northern Ireland's electricity, gas, water and sewerage industries. The Utility Regulator works to deliver a number of key statutory objectives including, to protect the short and long-term interests of electricity, gas, water and sewerage consumers with regard to price and quality of service.

To support its mission, the Utility Regulator has identified a need to better understand the domestic energy consumer perspective in Northern Ireland, in line with best practice, through direct interaction and statistically robust research with the segment. In August 2022, the Utility Regulator commissioned Perceptive Insight, an independent market research company, to conduct the third and fourth phases of a Tracker survey to measure consumer engagement, experience and attitudes on a number of areas within the domestic energy markets in Northern Ireland.

Alignment with Utility Regulator's Corporate Strategy and Consumer Protection Programme

The research conducted through the Domestic Tracker aligns to the themes in both the Utility Regulator's Corporate Strategy 2024 - 2029 "Protecting Consumers on the way to Net Zero" and Consumer Protection Programme 2024 - 2029.

The survey outcomes will be used to measure progress against key objectives in the UR Corporate Strategy under the heading "providing the highest level of consumer service and protection" where UR aims to produce "measurable improvement in customer service experience for consumers" and to "produce more evidence-based research to enable positive policy outcomes for current and future consumers".

The Consumer Protection Programme 2024 - 2029 consists of three main themes, with the Domestic Tracker being a key workstream under the theme of "Research and Leadership". The outcomes of this research will inform and enable the work planned under the remaining themes of "Enablement" and "Protection".

Figure 1: Overview of the Utility Regulator’s Corporate Strategy 2024-2029



Figure 2: Overview of the Utility Regulator’s Consumer Protection Programme 2024-2029



Research aims & objectives

The research objective was to conduct a statistically robust and repeatable survey with domestic energy consumers in Northern Ireland to provide tracking data for planning and activity under the Utility Regulator's Corporate Strategy 2024 - 2029 and Consumer Protection Programme 2024 - 2029.

The aims of the research were as follows:

- To measure consumer engagement, experience and attitudes in the domestic markets in Northern Ireland; and
- To highlight the issues that impact this consumer group and track how these may have changed over time based on the findings from the 2022, 2021 and 2019 baseline Tracker surveys.

This is a follow-up survey to the 2019, 2021, and 2022 Domestic Trackers. Comparisons between the results obtained in this survey have been compared with those from previous years where appropriate. While interviewing for the 2021, 2022 and 2023 Domestic Trackers were carried out by telephone, the 2019 Tracker was conducted using a face-to-face methodology. This should be considered when interpreting any differences in results between the two Trackers.

Report structure

The report begins with an overview of the survey methodology and an outline of respondent demographics. The subsequent sections explore each of the survey themes as follow:

- Heating types and current energy supplier;
- Payment;
- Interaction with energy suppliers;
- Complaint handling;
- Switching;
- Payment difficulties;
- Consumer protections; and
- Support services;

Percentages cited in this report were calculated using unrounded figures then rounded to the nearest whole percent. Percentages for categories in the charts therefore may not sum to 100% due to rounding. Percentages cited that combine multiple response categories may not be equal to the sum of the rounded percentages for these categories. Where relevant statistically significant results exist at the 95% confidence level, these are clearly highlighted. Margin of error breakdowns are included at Table A3 in Appendix A. For data protection purposes, counts of less than five are not referenced in the main report and are suppressed in the supporting tables. The report concludes by highlighting areas for further consideration and with possible implications for the Utility Regulator Corporate Strategy.

3. Methodology

This section provides an overview of the approach taken in the design and implementation of the survey research. For a more detailed description of the methodology, please see Appendix A.

Approach

Perceptive Insight undertook a statistically representative survey of domestic energy consumers in Northern Ireland using a telephone interviewing methodology. Interviewing took place during October 2023 and November 2023, with each interview taking, on average, 15 to 20 minutes to complete. Interviewing was carried out in compliance with the UK GDPR 2018 and the Market Research Society Code of Conduct.

Questionnaire design

The questionnaire was designed in collaboration with the Utility Regulator project team and was initially based on the 2019 Tracker questionnaire. The questionnaire is reviewed each year and minor changes may be made to either add new questions or to remove. A copy of the questionnaire is included at Appendix C.

Sample design

The sampling frame for the study was all domestic households in Northern Ireland (NI). The inclusion of a question at the start of the survey ensured that interviews were conducted with the household member that has the sole or joint responsibility for bill payment.

To ensure that the survey was representative of NI households, a stratified sampling approach was implemented. Quotas were set based on Census data and mid-year population estimates for:

- Age;
- Gender;
- Socio-economic group;
- Urban/rural location; and
- Local council area.

Consumers with prepayment meters (PPM)

At the planning stage of the project, it was noted that 45% of electricity customers and 62% of gas customers use prepayment meters. Although no formal quotas were set, the percentage of respondents with PPMs was monitored throughout project implementation to ensure good representation of these sub-groups.

Quintiles of deprivation

Using the Northern Ireland Multiple Deprivation Measure (2017)³ we assigned each respondent, based on their postcode, to one of five quintiles of deprivation. Again this was monitored throughout project implementation to ensure good representation alongside other factors including location by local council and housing tenure.

Definitions

Throughout the report we examine the statistical significance of any differences observed within the various subgroups represented in the data. Included in these groups are ‘switchers’ and domestic consumers that are considered to be vulnerable.

Socioeconomic group

Respondents were grouped into two socioeconomic groups based on the occupation of the highest earner in their household. Respondents that fall into the ABC1 classification involve those in non-manual professional jobs, while those in the C2DE group have manual jobs which are either skilled, semi-skilled or unskilled. The C2DE group also comprises of respondents who are unemployed and do not have a regular income. Respondents who were retired and in receipt of a pension were grouped based on the job they held before retirement.

Switchers

Respondents were asked whether they had switched their energy supplier and, if so, when was the last time they had switched. The Consumer Council of NI considers domestic consumers to be ‘sticky’ if they have not switched suppliers within the last three years and so may require more encouragement to switch in the future⁴. For the purpose of this report, respondents that are referred to as ‘switchers’ have switched their energy supplier in the last three years, while ‘non-switchers’ are those who have either never switched or have not switched in the last 3 years. These criteria were also used in the 2022, 2021 and 2019 Domestic Trackers, which allows for comparisons over time.

Disability or illness

Respondents were classed as having a disability or illness if they or anyone in their household had any of the following:

- Chronic/serious illness;
- Medically dependent equipment oxygen use;
- Physical impairment, including being unable to answer the door;
- Blind or partially sighted;
- Hearing/speech difficulties, including deaf;
- Dementia;
- Developmental condition; or
- Mental health.

³ <https://www.nisra.gov.uk/statistics/deprivation/northern-ireland-multiple-deprivation-measure-2017-nimdm2017>

⁴ http://www.consumercouncil.org.uk/sites/default/files/original/Consumer_Council_response_to_UR_consultation_on_the_review_of_the_effectiveness_of_competition_FINAL.pdf

Vulnerability

Three levels of vulnerability are identified within the report:

- *High vulnerability* – includes consumers with a chronic/serious illness; who require the use of medical equipment in the home; and require oxygen use;
- *Medium vulnerability* – includes consumers aged 65 plus; with physical impairments; with mental health issues; with visual or hearing impairments; who are unable to answer the door;
- *Low vulnerability* – includes consumers with children aged under 5; who are unable to communicate in English; and those who have caring responsibilities for another member of their family.

For the purpose of this report, those respondents in the ‘high’ and ‘medium’ vulnerability category are grouped together, while those in the ‘low’ vulnerability group and those with no vulnerabilities will be considered separately. This approach replicates that taken for the 2019, 2021 and 2022 Domestic Trackers.

Self-disconnection

Self-disconnection refers to respondents who have gone without electricity or gas because the cost was too high or because they had run out of credit on their prepayment meter.

Respondent demographics

Age, gender, SEG and location

The table below indicates the final survey responses achieved by age, gender, socio-economic group and location.⁵

STRATIFICATION VARIABLE		ACHIEVED NO.	ACHIEVED %
Age (HRP)	18 - 34	215	14%
	35 - 44	263	18%
	45 - 64	572	38%
	65 and over	422	28%
	Prefer not to say	30	2%
Gender	Male	730	49%
	Female	771	51%
	Other	1	0%
SEG ⁶	ABC1	730	49%
	C2DE	727	48%
	Prefer not to say	45	3%
Urban/Rural	Urban	905	60%
	Rural/Mixed	597	40%
Council	Antrim and Newtownabbey	120	8%
	Ards and North Down	128	9%
	Armagh City, Banbridge and Craigavon	167	11%
	Belfast	273	18%
	Causeway Coast and Glens	117	8%
	Derry City and Strabane	133	9%
	Fermanagh and Omagh	88	6%
	Lisburn and Castlereagh	120	8%
	Mid and East Antrim	101	7%
	Mid Ulster	123	8%
	Newry, Mourne and Down	132	9%
Multiple Deprivation Measure quintile	1 – Most deprived	286	19%
	2	299	20%
	3	310	21%
	4	310	21%
	5 – Least deprived	297	20%
Total		1502	100%

⁵Percentages cited in this report were calculated using unrounded figures then rounded to the nearest whole percent. Percentages for categories in the charts therefore may not sum to 100% due to rounding. Percentages cited that combine multiple response categories may not be equal to the sum of the rounded percentages for these categories.

⁶The socioeconomic group is based on the occupation of the chief income earner in the household. Those in the ABC1 group consist of people working in higher, intermediate and junior managerial, administrative, professional occupations. Those in the C2DE group consist of people working in skilled, semi-skilled, and unskilled manual occupations, as well as those who are unemployed.

4. Heating types and current energy supplier

In this section we provide details of the type of energy that consumers have in their home and their suppliers. The section is structured under the following headings:

- Type of energy used to heat the household;
- Intention to switch heating source;
- Energy supplier; and
- Energy efficiency measures

Key findings

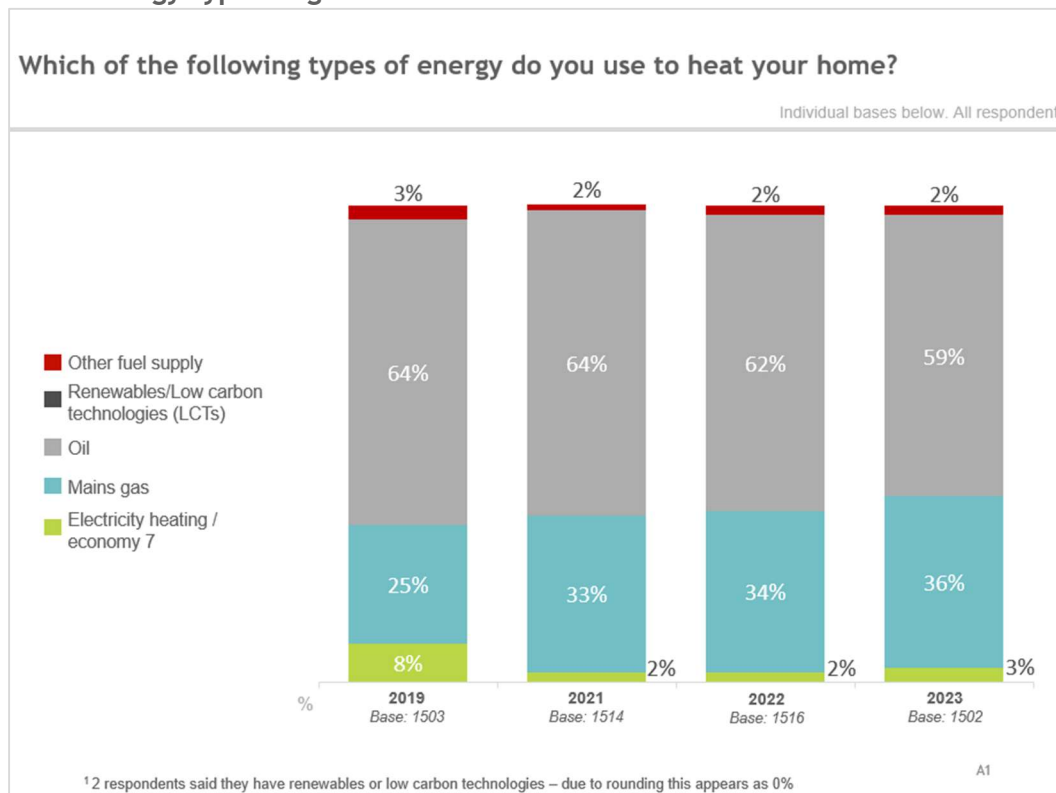
- 59% of respondents use oil to heat their homes, followed by 36% who have mains gas installed.
- 3% of domestic consumers⁷ have intentions to switch their home heating method in the next three years.
- Almost all (95%) domestic consumers are aware of who their electricity supplier is. Most common were Power NI (51%) and SSE (23%).
- 94% of those with mains gas were able to recall who their gas supplier is. Most common were SSE (58%) then Firmus (40%).
- 26% had installed energy efficiency measures in their home within the last three years, compared to 37% in 2022. Of those who had not installed energy efficiency measures over the last three years, 43% said that their home came with them installed already, followed by 34% who had installed them more than three years ago. Loft insulation (69%), cavity wall insulation (47%) and double glazing (20%) were the most common measures implemented.
- 8% of domestic consumers use renewable energy systems or low carbon technologies in their home for heating or electricity.

⁷ Where we refer to 'consumers' in the report, we are referring to survey respondents.

Type of energy used to heat the household

The following charts provide a breakdown of respondents by the type of energy used to heat their household. Respondents who used more than one type of energy to heat their home were asked to select the source of heating that they predominantly used. The source of energy most likely to be used was oil with 59% of respondents confirming that they have this in their home. Over one third (36%) reported that they had mains gas, a slight increase from 34% in 2022.

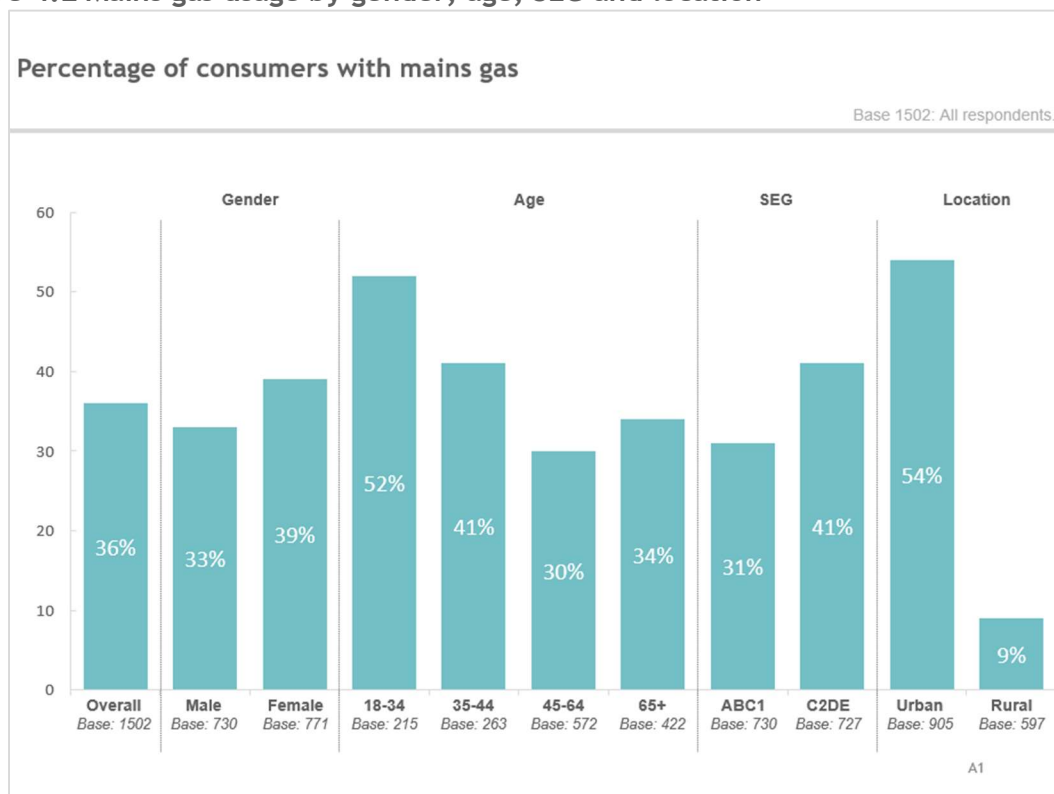
Figure 4.1 Energy type usage



Mains gas use

Analysis by sub-group shows significant difference by age and location with those in the 18 to 34 and 35 to 44 age groups, and those living in urban areas more likely to be mains gas users.

Figure 4.2 Mains gas usage by gender, age, SEG and location



The following significant differences in household fuel type were also observed on analysis (see table 4.1):

- Respondents aged 65 and over (61%) were more likely to have oil heating in their home when compared with those aged 18 to 34 (46%);
- Almost two thirds (64%) of those in the ABC1 socioeconomic group (SEG) had oil heating installed, compared to 55% in the C2DE group;
- Respondents living in rural areas (84%) were more likely to have oil heating in their home than those in urban areas (43%);
- Those living in the most deprived areas (1st Quintile of Deprivation) (67%) were more likely to use mains gas for their heating than all other respondents. Respondents living in the least deprived areas (5th Quintile) (54%, compared to 28% in the most deprived areas) were more likely to use oil heating;
- Two thirds (67%) of respondents who own their home use oil heating, compared to 52% who privately rent and 27% living in social housing;
- Respondents considered to be in the high or medium vulnerability group (40%) were more likely to have mains gas installed than those who are not vulnerable (32%); and
- Two in five (42%) of those respondents who would be considered to have or live with someone who has a disability or illness have mains gas installed in their home, compared to one third (35%) of those who do not have a disability or illness.

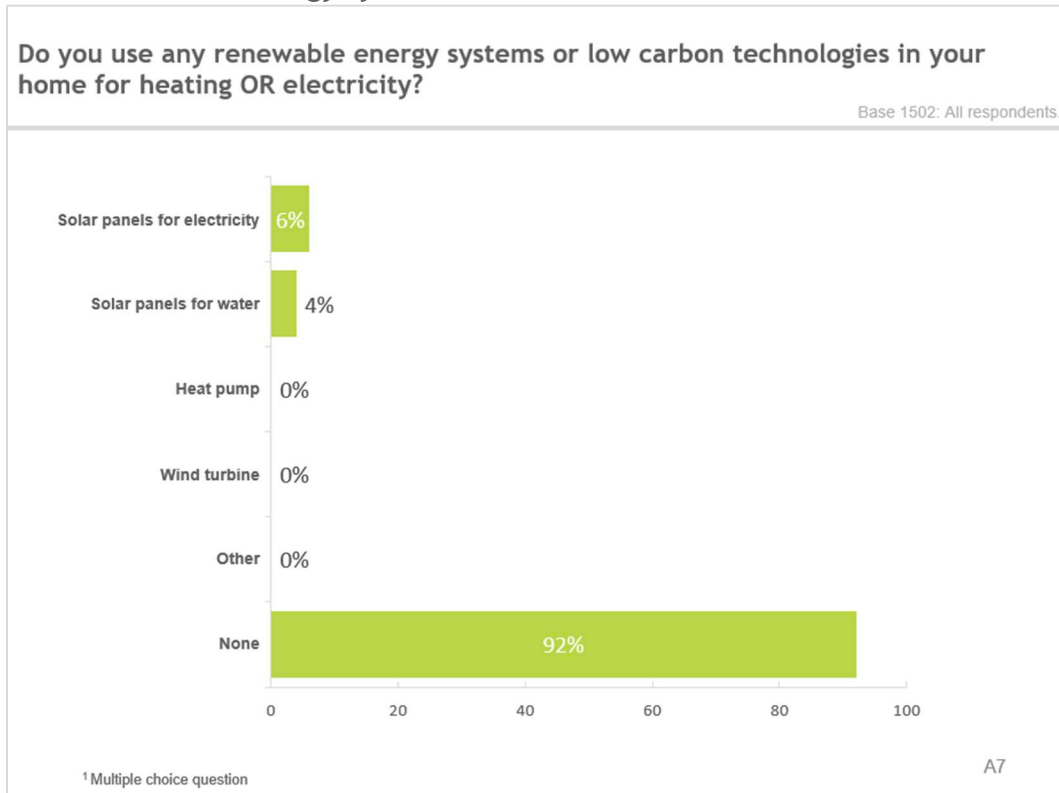
Table 4.1 Fuel source by demographics, location, deprivation, tenure, vulnerability and disability/illness

		Electricity heating	Mains gas	Oil	Renewables / LCTs	Other	Total
Overall	All Base: 1502	3%	36%	59%	0%	2%	100%
Age	Under 35 Base:215	1%	52%	46%	-	1%	100%
	35-44 Base:263	3%	41%	54%	0%	2%	100%
	45-64 Base:572	3%	30%	65%	-	2%	100%
	65 plus Base: 422	2%	34%	61%	0%	3%	100%
SEG	ABC1 Base: 730	2%	31%	64%	0%	2%	100%
	C2DE Base: 727	3%	41%	55%	-	2%	100%
Location	Urban Base: 905	3%	54%	43%	0%	1%	100%
	Rural Base: 597	3%	9%	84%	0%	4%	100%
MDM Quintile	1 - Most deprived Base: 286	3%	67%	28%	-	2%	100%
	2 Base: 299	3%	29%	65%	0%	2%	100%
	3 Base: 310	3%	21%	73%	0%	3%	100%
	4 Base: 310	2%	22%	74%	-	2%	100%
	5 - Least deprived Base: 297	2%	43%	54%	-	1%	100%
Tenure	Owner occupied Base: 1078	3%	27%	67%	0%	3%	100%
	Private rented Base: 163	4%	43%	52%	-	1%	100%
	Social rented Base: 231	1%	71%	27%	-	0%	100%
Vulnerability	High/medium vulnerability Base: 706	2%	40%	56%	0%	2%	100%
	Low vulnerability Base: 63	2%	38%	59%	-	2%	100%
	Not vulnerable Base: 733	3%	32%	62%	-	2%	100%
Disability/ illness	Yes Base: 283	2%	42%	55%	-	1%	100%
	No Base: 1168	3%	35%	60%	0%	2%	100%

A new question was included this year where respondents were asked whether they use any renewable energy systems or low carbon technologies (LCTs) in their home for heating or electricity (see figure 4.3).

8% reported that they use renewable energy systems or LCTs, with solar panels for electricity (6%) and water (4%) the most commonly used types.

Figure 4.3 Renewable energy systems or LCTs



There were several subgroups that were significantly more likely to not have any renewable energy systems or LCTs installed (see Table 4.2):

- Almost all (99%) of those who privately rent their home do not have any LCTs, compared to 91% who own their home;
- Respondents living in the most deprived areas (97%) were more likely to not have any of these technologies installed when compared with those in the least deprived areas (92%);
- 11% of respondents living in rural areas indicated that they have renewable energy systems or LCTs in their home, compared to 5% of those living in urban areas;
- Those who have gas heating (97%) were more likely than respondents using other heating methods (90%) to not have these technologies in their home.

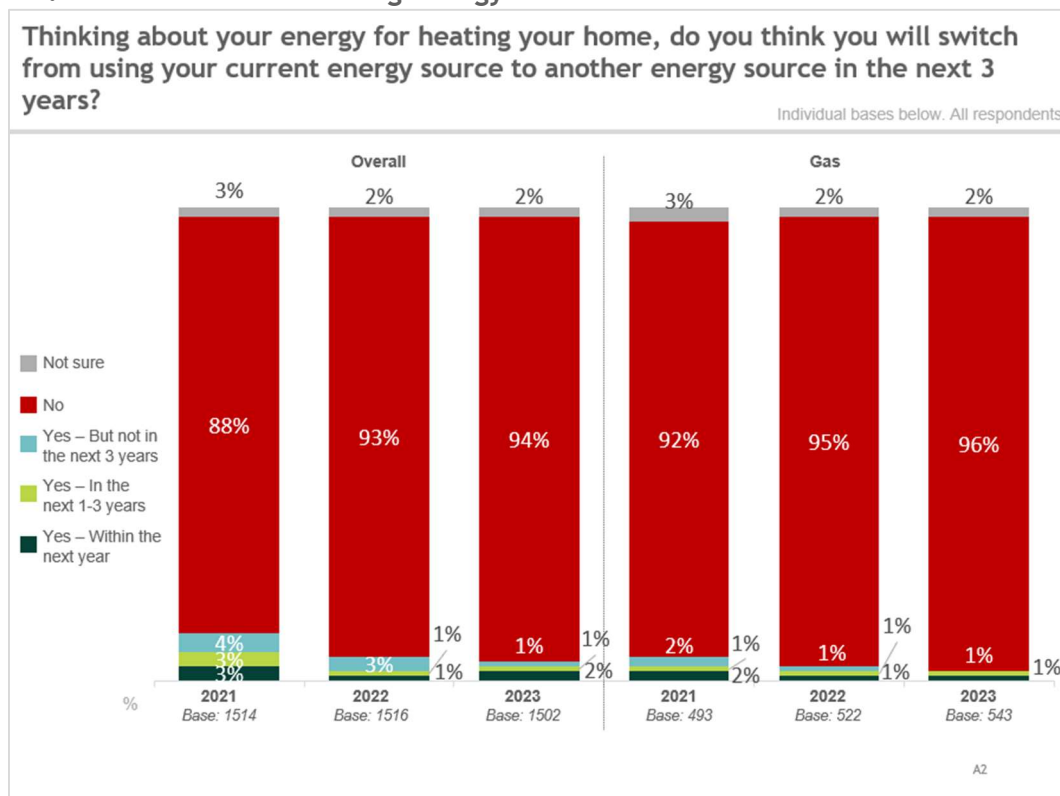
Table 4.2 Renewable energy systems or LCTs by location, deprivation, tenure, and heating

		Any renewable energy systems/ LCTs	None	Total
Overall	All Base: 1502	8%	92%	100%
Location	Urban Base: 905	5%	95%	100%
	Rural Base: 597	11%	89%	100%
MDM Quintile	1 - Most deprived Base: 286	3%	97%	100%
	2 Base: 299	5%	95%	100%
	3 Base: 310	10%	90%	100%
	4 Base: 310	10%	90%	100%
	5 - Least deprived Base: 297	8%	92%	100%
Tenure	Owner occupied Base: 1078	9%	91%	100%
	Private rented Base: 163	1%	99%	100%
	Social rented Base: 231	5%	95%	100%
Heating	Gas heating Base: 744	3%	97%	100%
	Other methods Base: 716	10%	90%	100%

Intentions to switch energy type

When considering the type of energy used to heat their home, 3% (up slightly from 2% in 2022) of electricity customers and 2% (the same as in 2022) of gas customers said that they were thinking about switching their current energy source within the next three years. A further 1% of electricity consumers expected to switch in over three years-time, with only two gas customers expecting this (see Figure 4.4).

Figure 4.4 Likelihood of switching energy source



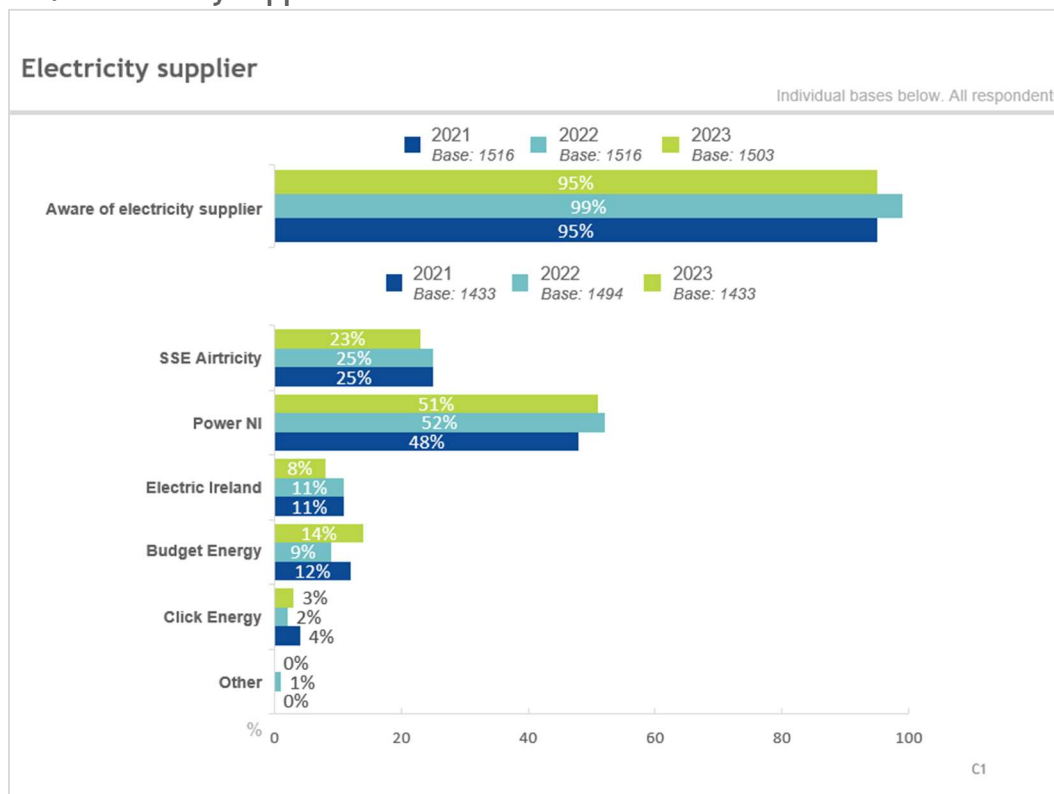
Of those who said they intend to switch their energy source, mains gas (62%, $n=36$) was the most preferred source, followed by renewables or low carbon technologies (19%, $n=11$).

Energy supplier

Electricity supplier

The majority (95%) were aware of who their electricity supplier was, although this has fallen from 99% in 2022. The most common electricity supplier was Power NI at 51%, followed by SSE Airtricity at 23% (see Figure 4.5).

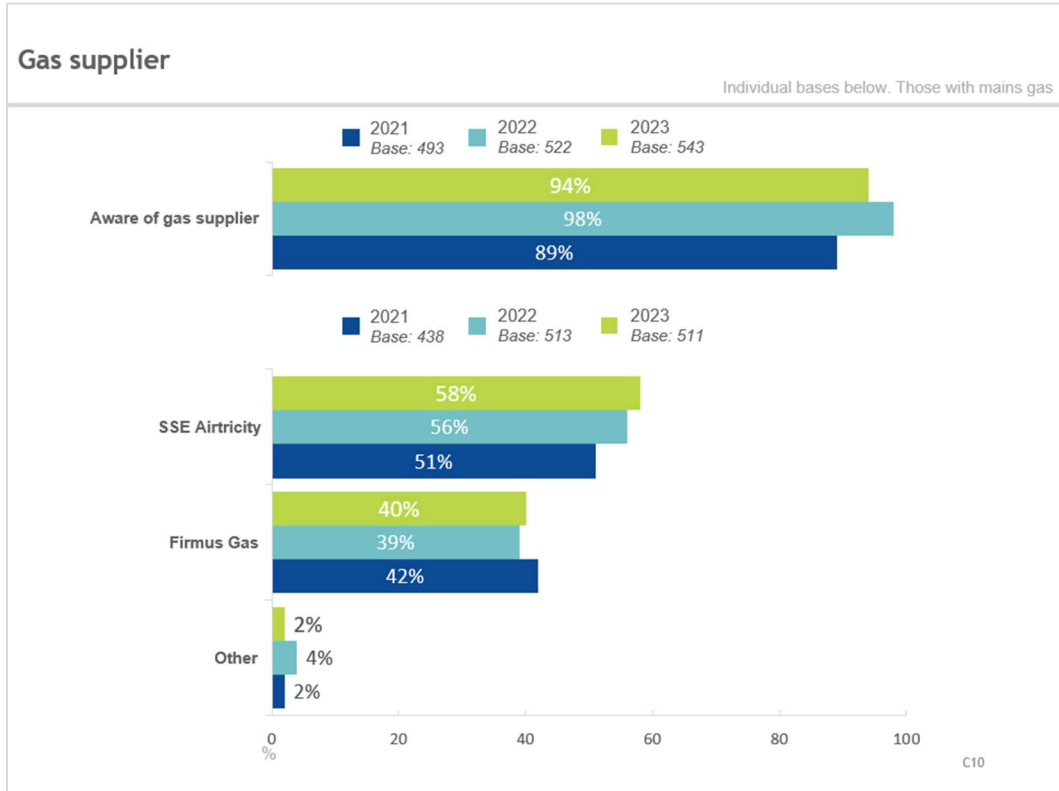
Figure 4.5 Electricity supplier



Gas supplier

The proportion of respondents who are aware of who their gas supplier is has also fallen from 98% in 2022 to 94%. Of those who are aware, SSE Airtricity was the most common supplier at 58% followed by Firmus Gas at 40%. 1% believed that Phoenix Gas was still their supplier and 1% cited other suppliers (see Figure 4.6).

Figure 4.6 Gas supplier

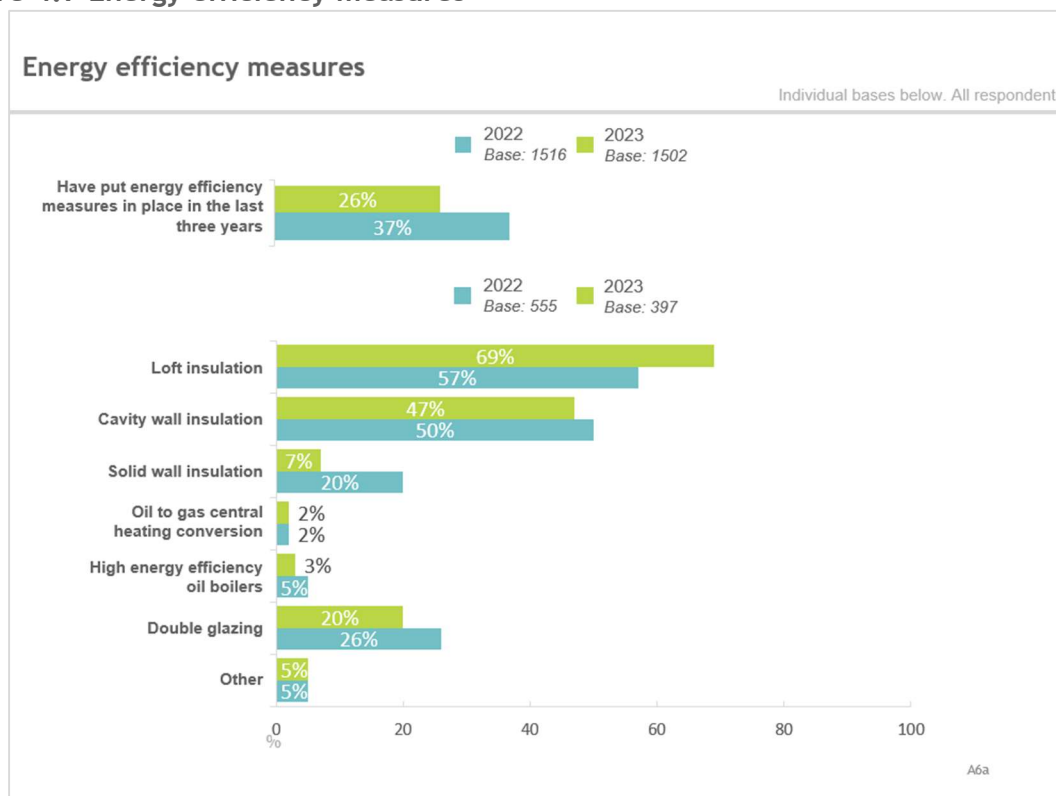


Energy efficiency measures

Respondents were asked whether they had put any energy efficiency measures in place in their home in the last three years (see Figure 4.7).

One quarter (26%) of domestic consumers have installed energy efficiency measures in their homes in the last three years, compared to 37% of respondents in 2022. Loft insulation (69%), cavity wall insulation (47%), and double glazing windows (20%) were the most common measures implemented.

Figure 4.7 Energy efficiency measures



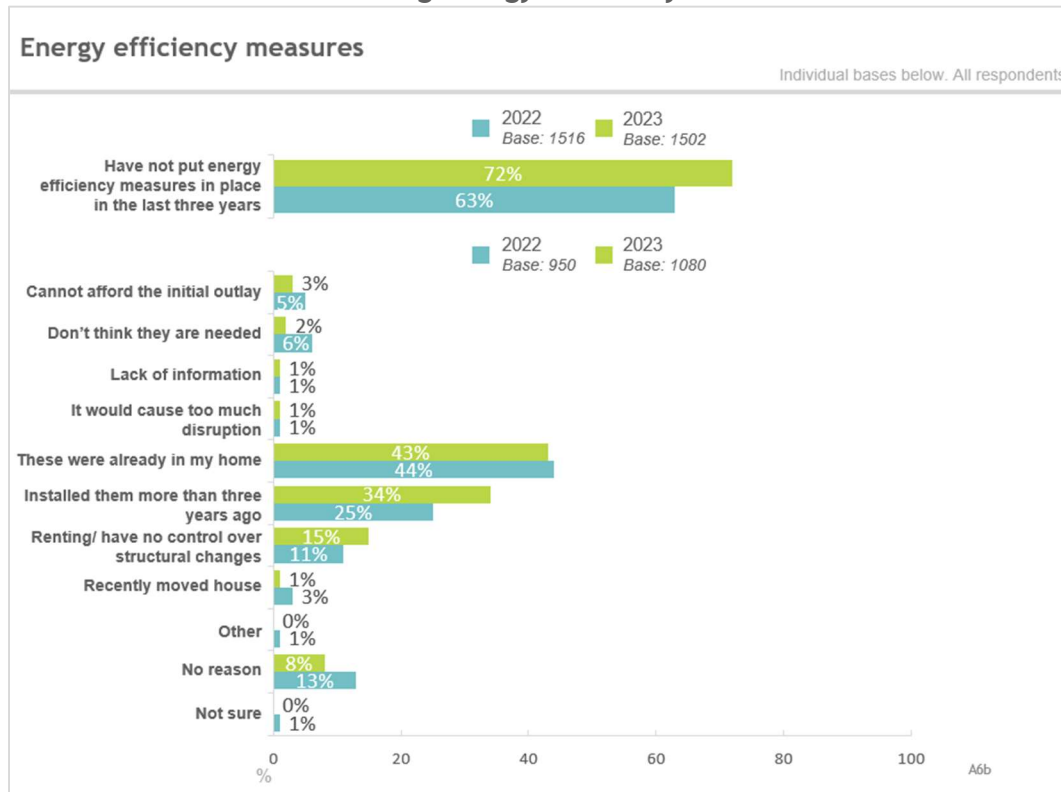
Respondents who own their home (30%) were more likely to have undertaken energy efficiency measures than those living in social housing (21%) and who privately rent (11%). One third (33%) of those who have switched their electricity supplier in the last three years have installed energy efficiency measures in their home, compared to just under one quarter (23%) of those who have not switched. One third (33%) of those who are not vulnerable have energy efficiency measures installed in their home, compared to one fifth (21%) of those in the high or medium vulnerability group, with those who do not have or live with someone who has a disability or illness (27%) also more likely to have taken such measures than those respondents who do have or live with someone who has a disability or illness (21%).

Table 4.3 Energy efficiency measures by tenure, electricity switching, vulnerability, and disability

		Yes	No	Not sure	Total
Overall	All Base: 1502	26%	72%	2%	100%
Tenure	Owner occupied Base: 1078	30%	69%	1%	100%
	Private rented Base: 163	11%	86%	3%	100%
	Social rented Base: 231	21%	75%	4%	100%
Electricity switching	Switchers Base: 541	33%	66%	2%	100%
	Non-switchers Base: 961	23%	75%	2%	100%
Vulnerability	High/medium vulnerability Base: 706	21%	78%	1%	100%
	Low vulnerability Base: 63	14%	83%	3%	100%
	Not vulnerable Base: 733	33%	65%	2%	100%
Disability/illness	Yes Base: 283	21%	78%	1%	100%
	No Base: 1168	27%	71%	2%	100%

Those who had not put any measures in place were asked for their reasons for not doing this. 43% said that there were already measures in place when they moved into their home, while one third (34%) had measures installed more than three years ago. 15% mentioned they had no control over structural changes to their home, and 3% cannot afford the initial outlay (see Figure 4.8).

Figure 4.8 Reasons for not installing energy efficiency measures



Percentages cited in this report were calculated using unrounded figures then rounded to the nearest whole percent. Percentages for categories in the charts therefore may not sum to 100% due to rounding. Percentages cited that combine multiple response categories may not be equal to the sum of the rounded percentages for these categories.

5. Payment

In this section we explore the views and experiences of consumers in relation to the following:

- Spending on electricity and gas;
- Payment methods and tariff types;
- Reasons for using a prepayment meter for electricity or gas; and
- Paying extra on bill.

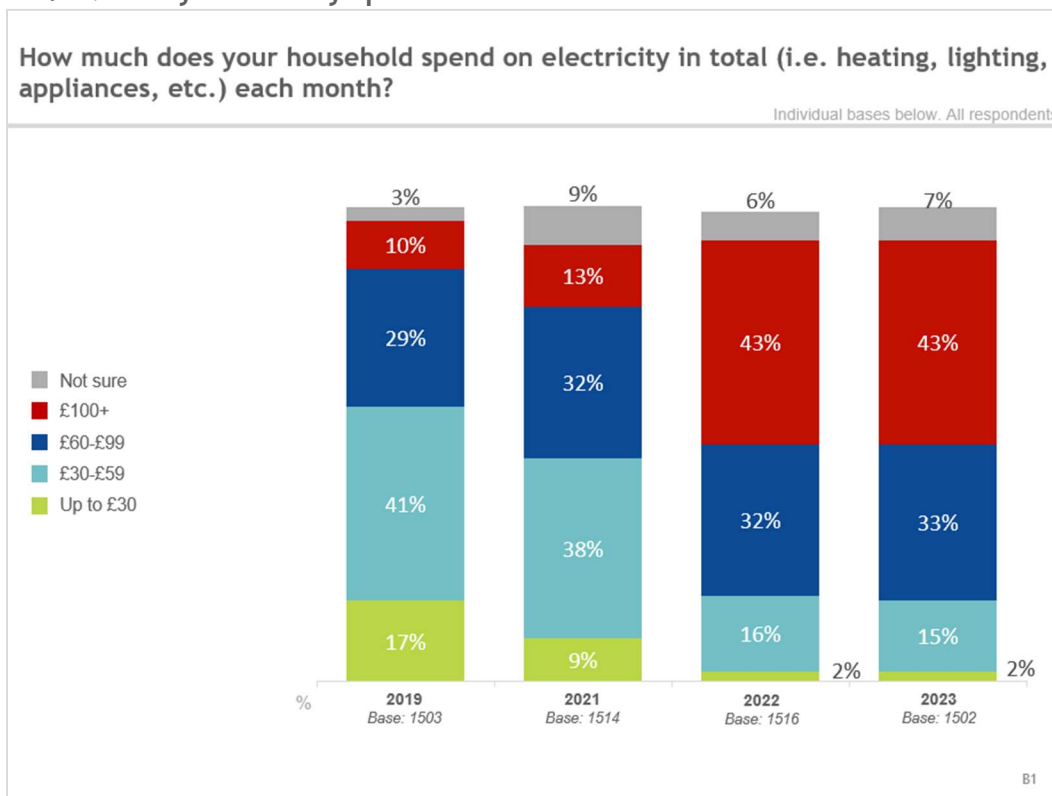
Key findings

- 43% have electricity bills of at least £100 per month, the same as in 2022 but still notably higher than in 2021 (13%).
- The proportion of respondents paying £150 or more per month for their electricity has increased from 12% to 16%.
- 42% of gas respondents have a monthly spend of at least £100, compared to 48% who reported this in 2022 and 9% in 2021.
- A prepayment meter was the most common method of paying for both electricity (47%) and gas (69%). This represents an increase from 43% (for electricity) and 59% (for gas) in 2022.
- Convenience was the most often cited reason for having a prepayment meter (78% of those with an electricity prepayment meter and 75% of those with a gas prepayment meter).
- Consumers reporting using a prepayment meter to monitor their energy usage has risen from 2022, for both electricity and gas:
 - 33% of electricity consumers (compared to 7% in 2022); and
 - 34% of gas consumers (compared to 5% in 2022).
- The majority of electricity (96%) and gas (97%) consumers who use a prepayment meter indicated that they are content to remain using this method rather than change to alternative payments methods such as direct debit.
- Support has fallen for paying extra on bills for future investment since 2022:
 - 83% of respondents stated that they would be unwilling to pay anything extra on their bill for future investment (compared to 63% in 2022);
 - 12% would pay extra to provide extra help to vulnerable customers (24% in 2022);
 - 9% would pay extra for projects to protect the environment (24% in 2022); and
 - 4% would be willing to pay extra to improve the reliability of the network (13% in 2022).

Spend on electricity and heating

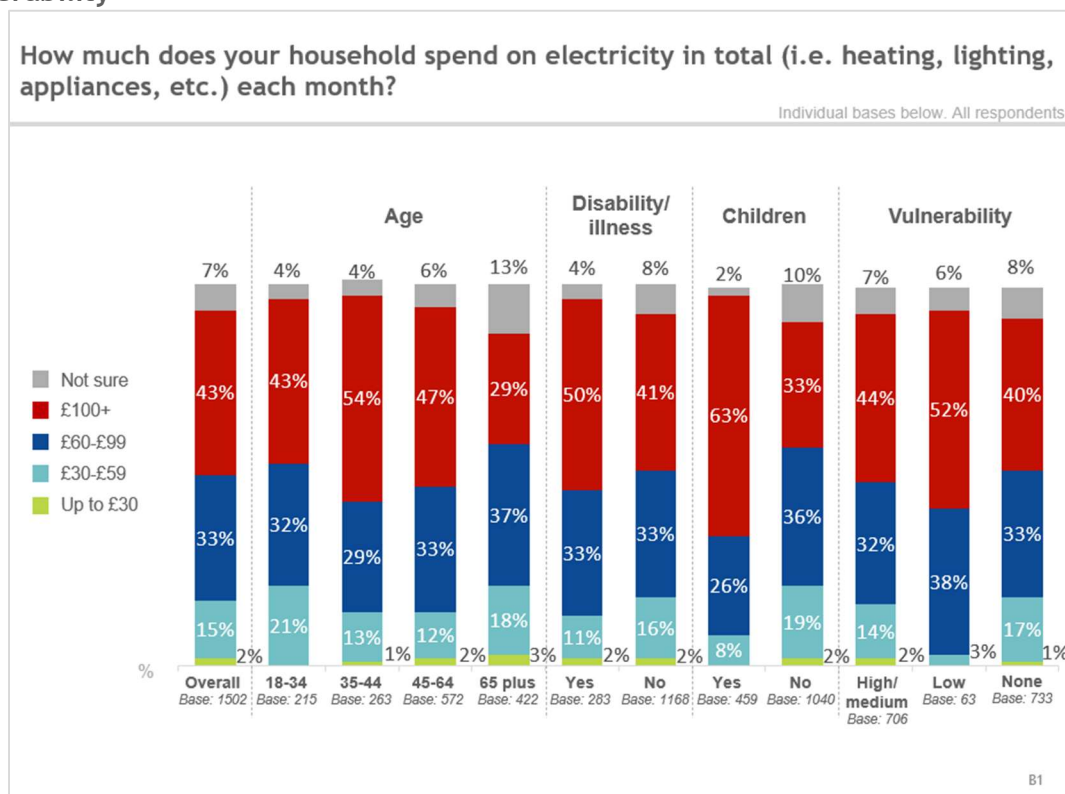
Respondents were asked what their monthly household spend on electricity was (see figure 5.1). 2% reported that they spend up to £30, with 15% saying it was between £30 and £59. Respondents were most likely to spend between £60 and £99 (33%) and £100-£149 (28%). While monthly spend on electricity has remained consistent with the 2022 results, those paying £150 or more per month has increased from 12% to 16%.

Figure 5.1 Monthly electricity spend



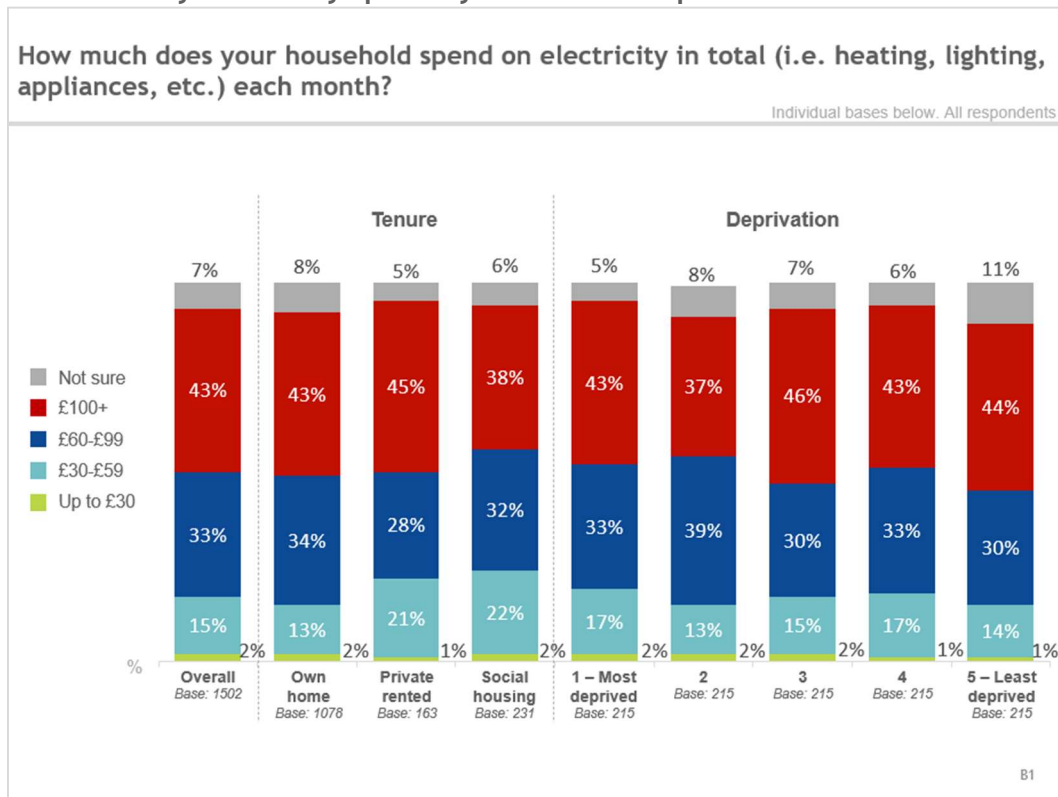
Respondents aged under 65 were more likely to spend £100 or more per month on electricity than those aged 65 and over. 35 to 44 year olds were the group with the highest monthly electricity spend with 54% spending over £100 per month on their electricity, compared to 29% of those aged 65 and over. 13% of those aged 65 and over were unsure of how much they spend on electricity per month, compared to 4% in the younger age group. Half (50%) of those who have or live with someone who has a disability or illness spend at least £100 per month, compared to 41% of those who do not have someone with a disability or illness in their household. Those respondents who have children in their household (63%) were more likely to spend £100 or more compared to those without children (33%). However, no significant differences were observed between those who are considered vulnerable and who are not vulnerable (see Figure 5.2).

Figure 5.2 Monthly electricity spend by age, disability/illness, children, and vulnerability



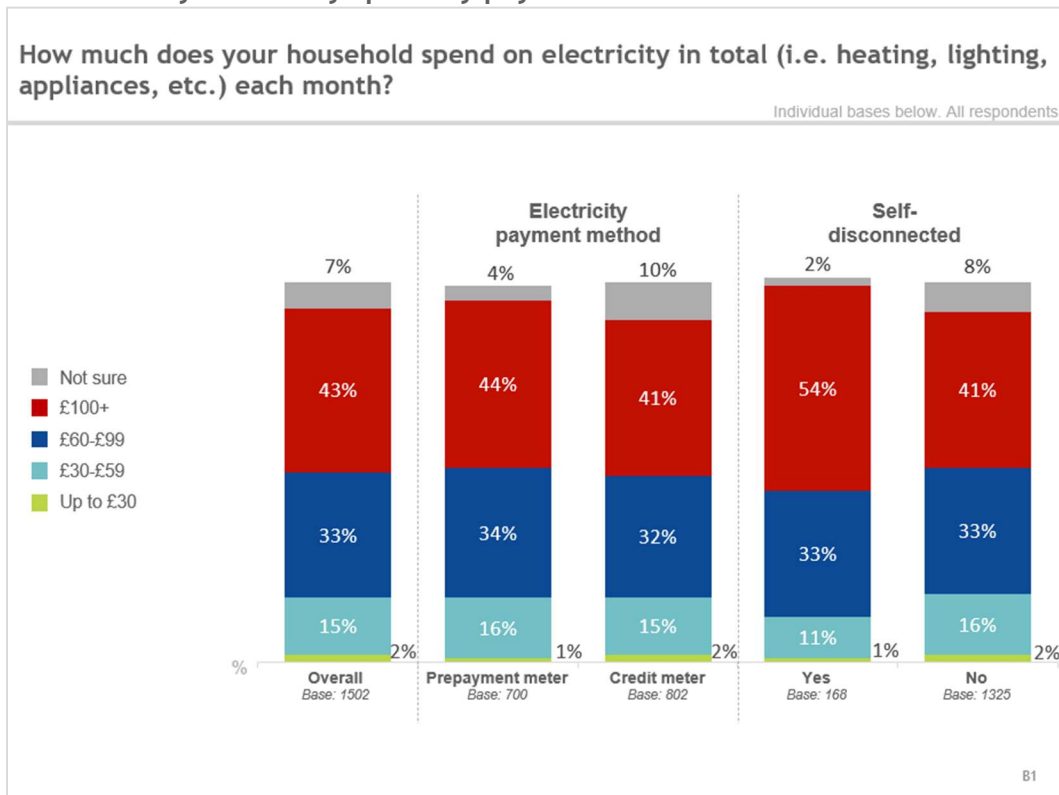
45% of respondents who privately rent their home pay £100 or more per month on electricity, compared to 43% who own their home and 38% who live in social housing. Respondents living in the least deprived areas (13%) were more likely to spend between £150 and £199 than those in the most deprived areas (7%) (see Figure 5.3).

Figure 5.3 Monthly electricity spend by tenure and deprivation



Those who have a credit meter⁸ for electricity (10%) were more likely to not know how much they spend per month on electricity than those with a prepayment meter (4%). 54% of those who have self-disconnected from their electricity supply spend at least £100 per month on electricity, compared to 41% who have not self-disconnected (see Figure 5.4).

Figure 5.4 Monthly electricity spend by payment method and self-disconnection

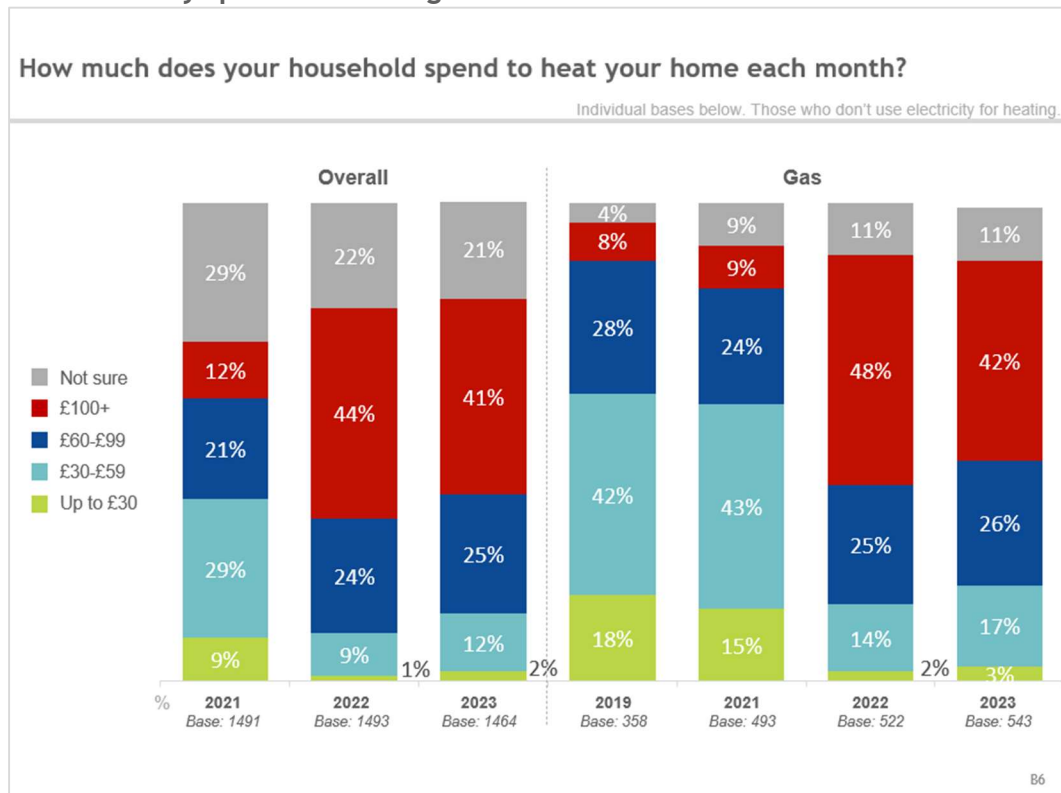


⁸ Credit customers or those who have a credit meter refers to respondents who do not use a prepayment meter to pay for their electricity or gas.

Monthly spend on heating

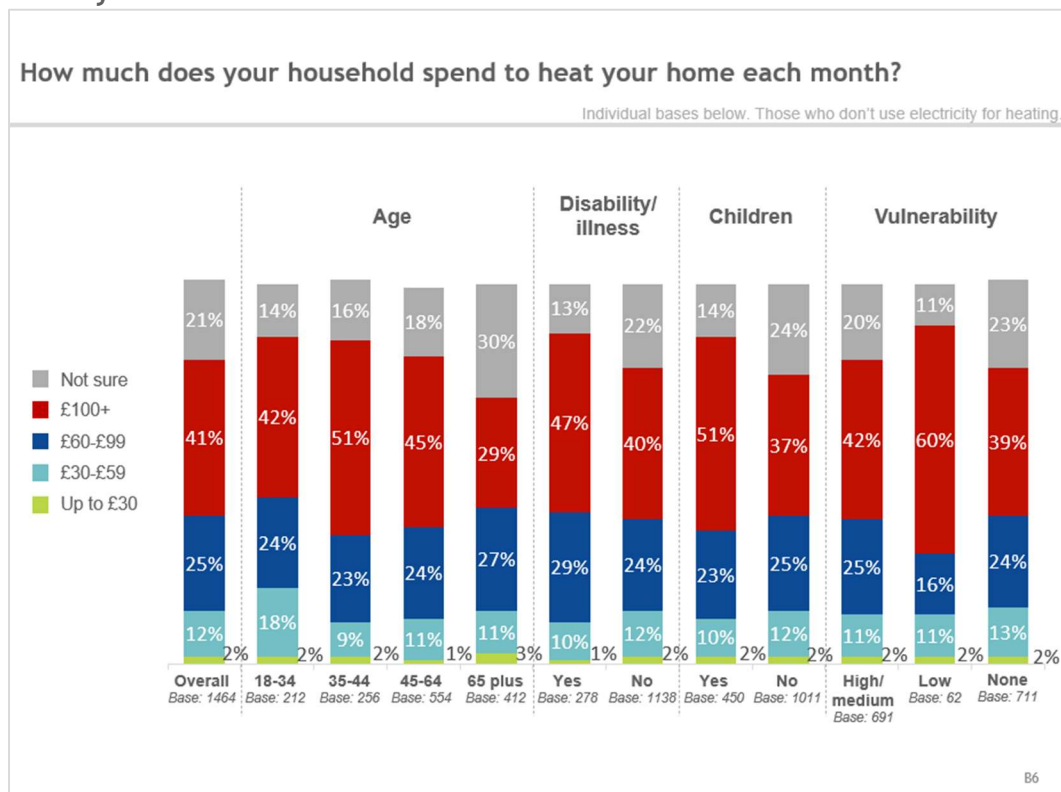
Respondents were asked how much they spend each month on heating their home (see Figure 5.5). Those with gas (89%) were more likely than those who use other means (74%) to know how much their monthly spend was on heating. The most common spend was between £60 to £99 for gas users (26%) and £100 to £149 for those who used other means (26%). Overall, 41% reported spending £100 or more per month on heating, with 42% of gas users reporting this.

Figure 5.5 Monthly spend on heating



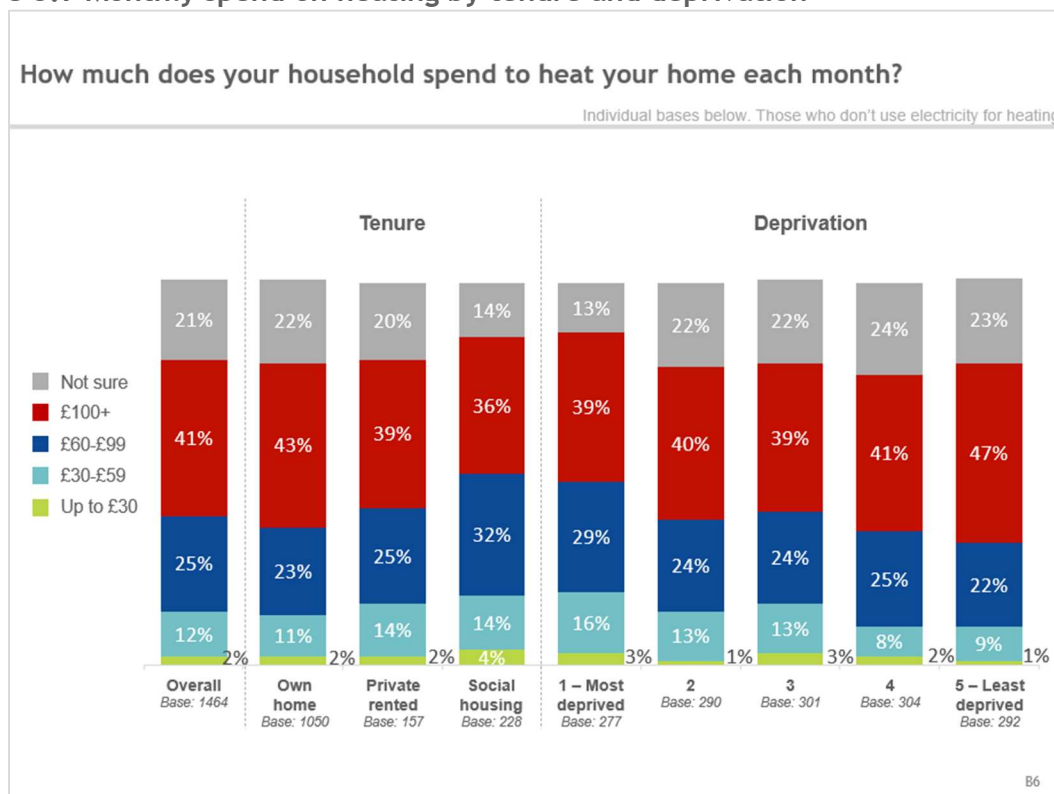
Those aged 35 to 44 (51%) were most likely to report that they spend at least £100 per month on heating; this compares to 29% of those aged 65 and over. Those who have someone with a disability or illness in their household (47%) and those who have children in their household (51%) were also more likely to say they spend at least £100 per month on heating than those who do not have a disability or illness in their household (40%) and who do not have children in their household (37%). Although those in the low vulnerability group (60%) were more likely to pay £100 or more on heating than those who are not vulnerable (39%), there were no significant differences between those in the high or medium vulnerability group and those who are not vulnerable (see Figure 5.6).

Figure 5.6 Monthly spend on heating by age, disability/illness, children, and vulnerability



One third (32%) of those living in social housing said that they spend between £60 and £99 per month on heating, compared to one quarter (25%) who privately rent and 23% who own their home. Those living in the least deprived areas (47%) were more likely to report that they spend £100 or more per month on heating than those in the most deprived areas (39%) (see Figure 5.7).

Figure 5.7 Monthly spend on heating by tenure and deprivation



The percentage of gas respondents paying £100 or more for their heating has fallen from 48% in 2022 to 42% in 2023. However, the proportion of gas respondents who were unsure of their monthly heating spend has fallen from 22% to 11% between 2022 and 2023. It should be noted, however, that the proportion of respondents overall who were unsure of their heating spend has increased from 11% to 21% in this time period (see Figure 5.4).

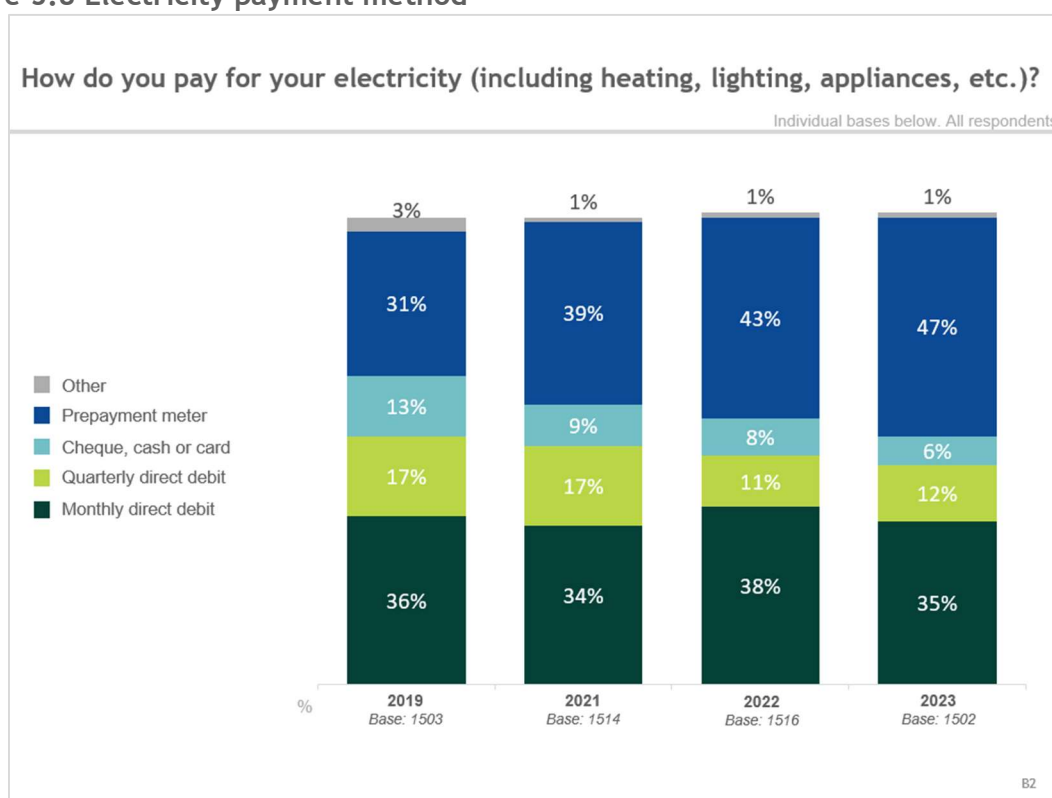
Energy payment methods and tariff types

Respondents were asked to provide details of their household's payment method and tariff type for electricity and gas.

Electricity

Domestic consumers were most likely to use a prepayment meter (47%) to pay for their electricity, increasing from 43% in 2022. In relation to credit meters, one third (35%) pay by monthly direct debit, decreasing slightly from 38% in 2022. 12% have a quarterly direct debit, increasing slightly from 11% in 2022, while 6% pay by cheque, cash or card on receipt of their bill (see Figure 5.8).

Figure 5.8 Electricity payment method



Methods of paying for electricity varied across various subgroups, with the following significant differences being observed (see Table 5.1):

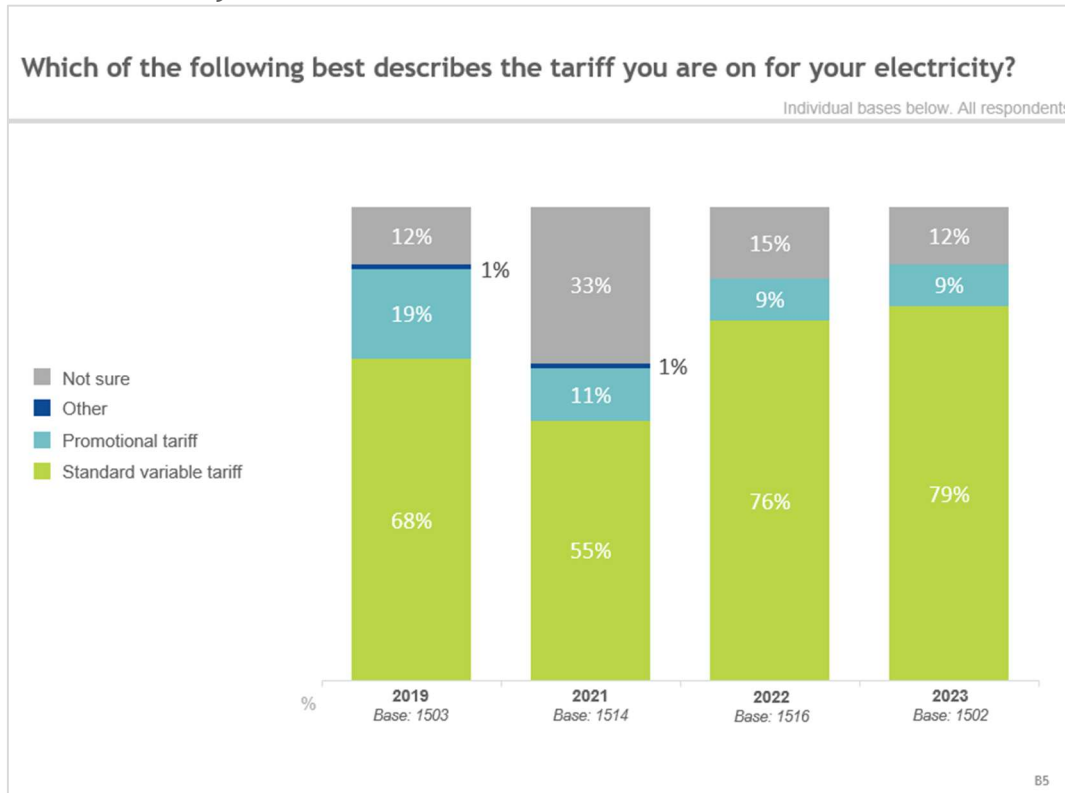
- Two thirds (65%) of those aged 18 to 34 said that they have a prepayment meter for electricity, compared to one third (33%) of those aged 65 and over. Respondents in the 65 and over group (10%) were also more likely to report paying by cheque, cash or card than all other age groups;
- Respondents in the C2DE socioeconomic group (60%) were more likely to report having a prepayment meter than those in the ABC1 group (33%). 47% of those in the ABC1 group stated that they are on monthly direct debit for their electricity, compared to 23% in the C2DE group;
- Half (51%) of urban respondents reported having a prepayment meter for electricity, compared to two in five (40%) living in rural areas;
- Respondents living in the most deprived areas (76%) were most likely to have a prepayment meter for electricity;
- Those living in social housing (84%) and who privately rent (80%) were much more likely to say they have a prepayment meter for electricity than those who own their home (34%);
- Respondents who have someone with a disability or illness in their household (57%) and those who have children (53%) were more likely to have an electricity prepayment meter than those who do not have someone with a disability or illness in their household (44%) and who do not have children in their household (44%);
- Almost one quarter (23%) of those who do not have internet access said that they pay for their electricity by cheque, cash or card, in comparison with 4% of those who do have access to the internet;
- Electricity switchers (50%) were more likely to state that they have a prepayment meter for electricity than those who would not be considered switchers (45%); and
- Respondents who have self-disconnected from their electricity (86%) were more likely to report having a prepayment meter in their home than those who have not done so (42%).

Table 5.1 Electricity payment method by demographics, location, deprivation, tenure, disability/illness, children, internet access, switching, and self-disconnection

		Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment meter	Other	Total
Overall	All Base: 1502	35%	12%	6%	47%	1%	100%
Age	Under 35 Base: 215	24%	11%	-	65%	0%	100%
	35-44 Base: 263	25%	13%	3%	59%	1%	100%
	45-64 Base: 572	38%	11%	5%	45%	1%	100%
	65 plus Base: 422	41%	13%	10%	33%	3%	100%
SEG	ABC1 Base: 730	47%	14%	5%	33%	2%	100%
	C2DE Base: 727	23%	9%	6%	60%	2%	100%
Location	Urban Base: 905	34%	10%	4%	51%	1%	100%
	Rural Base: 597	36%	15%	8%	40%	2%	100%
MDM Quintile	1 - Most deprived Base: 286	15%	5%	4%	76%	0%	100%
	2 Base: 299	30%	9%	4%	54%	3%	100%
	3 Base: 310	37%	15%	8%	39%	1%	100%
	4 Base: 310	39%	16%	6%	36%	2%	100%
	5 - Least deprived Base: 297	52%	12%	6%	30%	1%	100%
Tenure	Own home Base: 1078	44%	14%	6%	34%	2%	100%
	Private renting Base: 163	12%	7%	1%	80%	-	100%
	Social housing Base: 231	6%	3%	5%	84%	1%	100%
Disability/illness	Yes Base: 283	29%	8%	5%	57%	1%	100%
	No Base: 1168	36%	12%	6%	44%	1%	100%
Children	Yes Base: 459	31%	12%	4%	53%	1%	100%
	No Base: 1040	36%	12%	7%	44%	2%	100%
Internet access	Yes Base: 1401	36%	11%	4%	47%	1%	100%
	No Base: 101	19%	18%	23%	40%	1%	100%
Electricity switching	Switchers Base: 541	39%	8%	2%	50%	1%	100%
	Non-switchers Base: 961	32%	14%	8%	45%	2%	100%
Electricity self-disconnection	Yes Base: 168	8%	5%	1%	86%	-	100%
	No Base: 1325	38%	12%	6%	42%	2%	100%

Almost four in five (79%) reported that they were on their supplier's standard variable tariff, representing a slight increase from 76% in 2022. This is followed by 9% who were on a promotional tariff, the same proportion as in 2022. 12% were unsure what tariff they were on for electricity, falling slightly from 15% in 2022. Those who have switched their electricity supplier in the last three years (16%) were more likely to be on a promotional tariff than non-switchers (5%) (see Figure 5.9 and Table 5.2).

Figure 5.9 Electricity tariff



Respondents aged 65 and over (81%) were more likely to be on a standard variable tariff with their electricity supplier than those aged 18 to 34 (73%), while those in the ABC1 group (10%) were more likely to be on a promotional tariff when compared with those in the C2DE group (7%). Urban respondents (10%) were more likely to be on a promotional tariff than those living in rural areas (7%), while 13% of those living in the least deprived areas were on their electricity supplier's promotional tariff, compared to 5% in the most deprived areas. Those who have children in their household (14%) and who have access to the internet (9%) were also more likely to be on a promotional tariff than those who do not have children (7%) and who do not have access to the internet (2%) (see table 5.2).

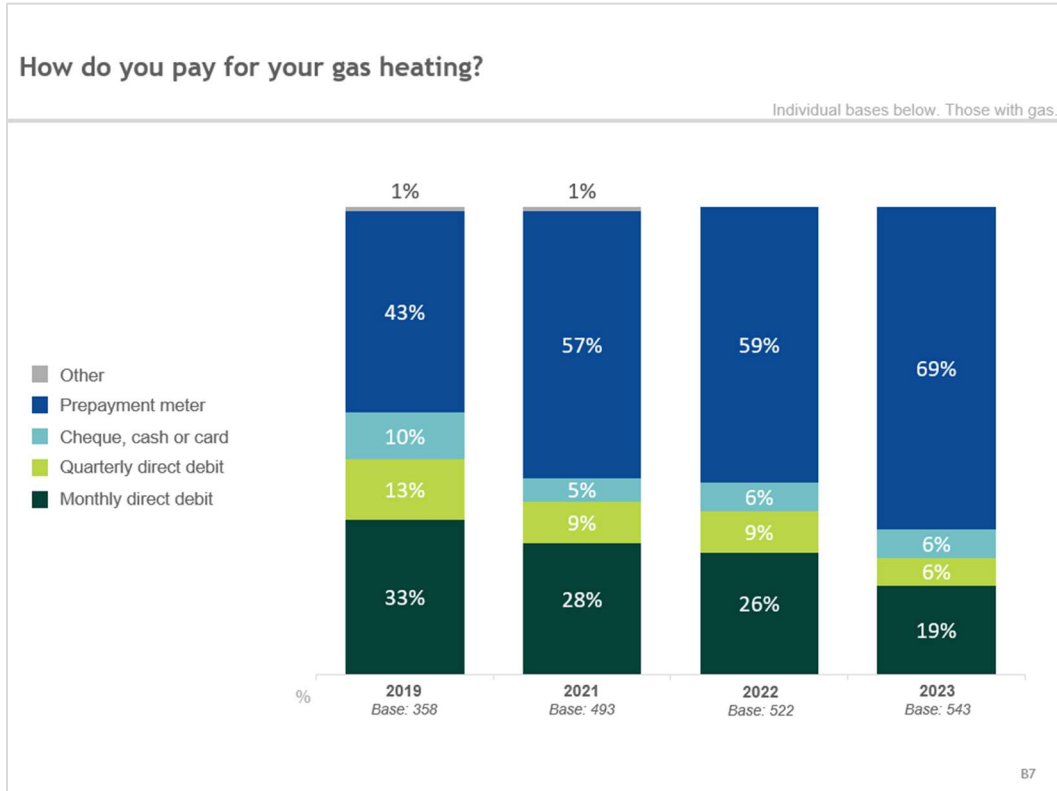
Table 5.2 Electricity tariff by demographics, location, deprivation, children, access to the internet, and electricity switching

		Standard variable tariff	Promotional tariff	Other	Don't know	Total
Overall	All <i>Base: 1502</i>	79%	9%	0%	12%	100%
Age	Under 35 <i>Base: 215</i>	73%	13%	0%	14%	100%
	35-44 <i>Base: 263</i>	75%	12%	-	13%	100%
	45-64 <i>Base: 572</i>	82%	10%	0%	9%	100%
	65 plus <i>Base: 422</i>	81%	4%	-	15%	100%
SEG	ABC1 <i>Base: 730</i>	77%	10%	0%	12%	100%
	C2DE <i>Base: 727</i>	81%	7%	-	11%	100%
Location	Urban <i>Base: 905</i>	78%	10%	-	12%	100%
	Rural <i>Base: 597</i>	80%	7%	0%	13%	100%
MDM Quintile	1 - Most deprived <i>Base: 286</i>	81%	5%	-	14%	100%
	2 <i>Base: 299</i>	80%	10%	-	10%	100%
	3 <i>Base: 310</i>	75%	10%	0%	14%	100%
	4 <i>Base: 310</i>	83%	7%	0%	10%	100%
	5 - Least deprived <i>Base: 297</i>	75%	13%	-	12%	100%
Children	Yes <i>Base: 459</i>	74%	14%	-	12%	100%
	No <i>Base: 1040</i>	81%	7%	0%	12%	100%
Internet access	Yes <i>Base: 1401</i>	79%	9%	0%	12%	100%
	No <i>Base: 101</i>	81%	2%	-	17%	100%
Electricity switching	Switchers <i>Base: 541</i>	72%	16%	-	12%	100%
	Non-switchers <i>Base: 961</i>	83%	5%	0%	12%	100%

Gas

Prepayment meters were also the most common method of paying for gas heating, with 69% of respondents saying they use one to pay for their gas, up from 59% in 2022. This was followed by one fifth (19%) who pay by monthly direct debit, and 6% who have a quarterly direct debit or by cheque, cash or card.

Figure 5.10 Gas payment method



There were similar differences in the method of payment for gas customers as for electricity customers (see Table 5.3):

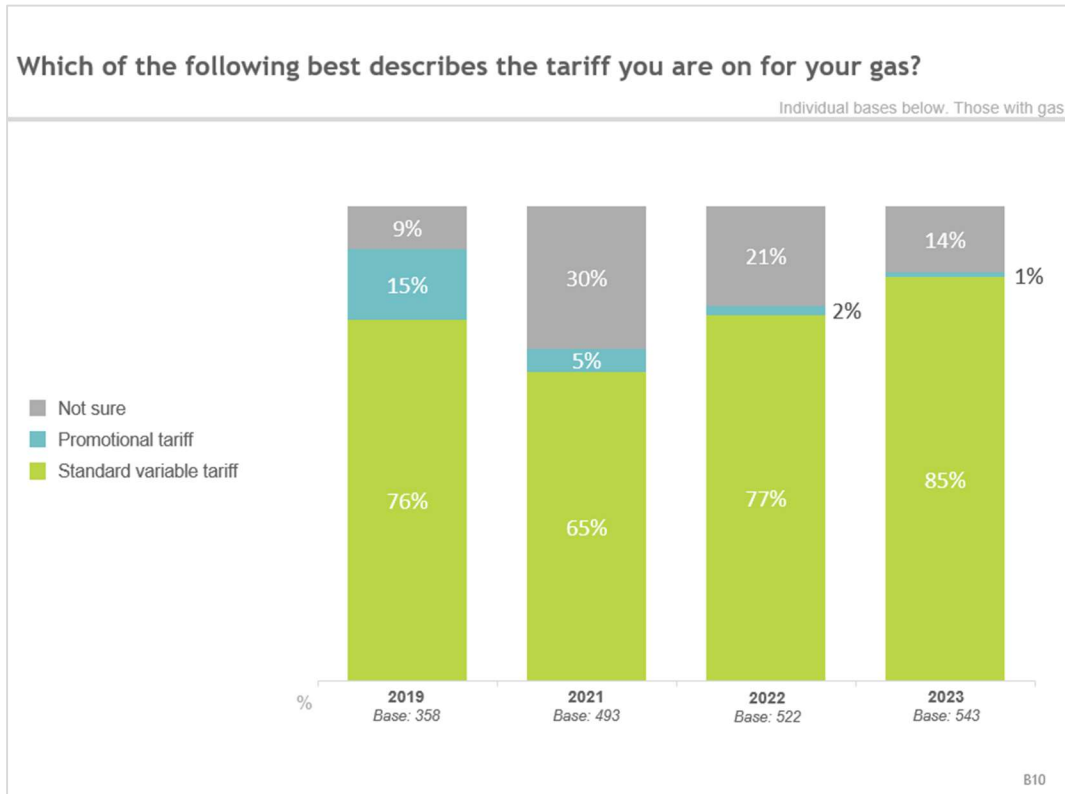
- Four in five (80%) of those aged under 35 have a prepayment meter for gas, compared to three in five (59%) of those aged 65 and over;
- Respondents in the C2DE group (80%) were more likely to have a prepayment meter for gas than those in the ABC1 group (55%);
- Respondents living in the most deprived areas (85%) were more likely than those living in all other areas to have a prepayment meter for gas;
- Those living in social housing (92%) and who privately rent (81%) were more likely to have a gas prepayment meter than those who own their home (54%);
- 79% of gas customers who have or live with someone who has a disability or illness have a prepayment meter, compared to two thirds (66%) of those who do not have someone with a disability or illness in their household;
- Those who have self-disconnected from their gas supply (90%) were more likely to have a prepayment meter than those who have not self-disconnected (64%).

Table 5.3 Gas payment method by demographics, deprivation, tenure, disability/illness, and self-disconnection

		Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment meter	Total
Overall	All Base: 543	19%	6%	6%	69%	100%
Age	Under 35 Base: 111	13%	6%	1%	80%	100%
	35-44 Base: 108	12%	9%	6%	73%	100%
	45-64 Base: 171	18%	7%	6%	68%	100%
	65 plus Base: 142	30%	3%	8%	59%	100%
SEG	ABC1 Base: 226	27%	10%	8%	55%	100%
	C2DE Base: 298	13%	3%	4%	80%	100%
MDM Quintile	1 - Most deprived Base: 192	8%	4%	2%	85%	100%
	2 Base: 87	11%	5%	9%	75%	100%
	3 Base: 66	18%	6%	9%	67%	100%
	4 Base: 69	25%	7%	7%	61%	100%
	5 - Least deprived Base: 129	38%	9%	7%	46%	100%
Tenure	Own home Base: 295	26%	9%	10%	54%	100%
	Private renting Base: 70	11%	4%	3%	81%	100%
	Social housing Base: 165	7%	1%	1%	92%	100%
Disability/illness	Yes Base: 119	12%	4%	5%	79%	100%
	No Base: 407	21%	7%	6%	66%	100%
Gas self-disconnection	Yes Base: 89	7%	1%	2%	90%	100%
	No Base: 449	22%	7%	7%	64%	100%

85% of households with gas heating reported that they were on a standard variable tariff with their supplier (up from 77% in 2022), with 1% being on a promotional tariff. However, 14% were unsure what tariff they were on (see Figure 5.11).

Figure 5.11 Gas tariff



Prepayment meters

Electricity

Of those respondents with a prepayment meter for electricity, over three quarters (78%) reported that the reason they have one is because it is convenient for them. The number of respondents who said they have a prepayment meter to monitor their energy usage has risen from 7% in 2022 to 33% in 2023. A further third (31%) mentioned that the property came with a prepayment meter already installed (see Figure 5.11). Those aged 65 and over (86%) were more likely than those in the younger age group (75%) to cite convenience as the reason for having a prepayment meter for electricity. Those aged 18 to 34 were the least likely to mention having a prepayment meter to budget energy costs (13%) and to monitor energy use (12%) (see Table 5.4).

Figure 5.12 Reasons for having a prepayment meter for electricity

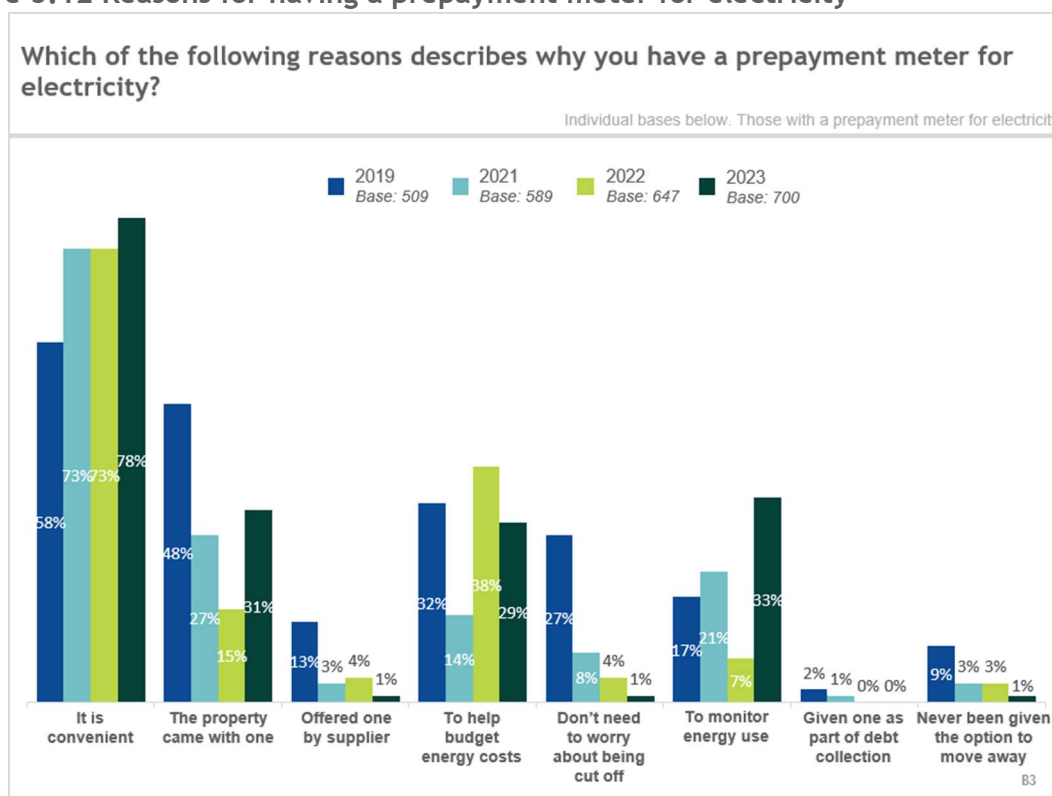
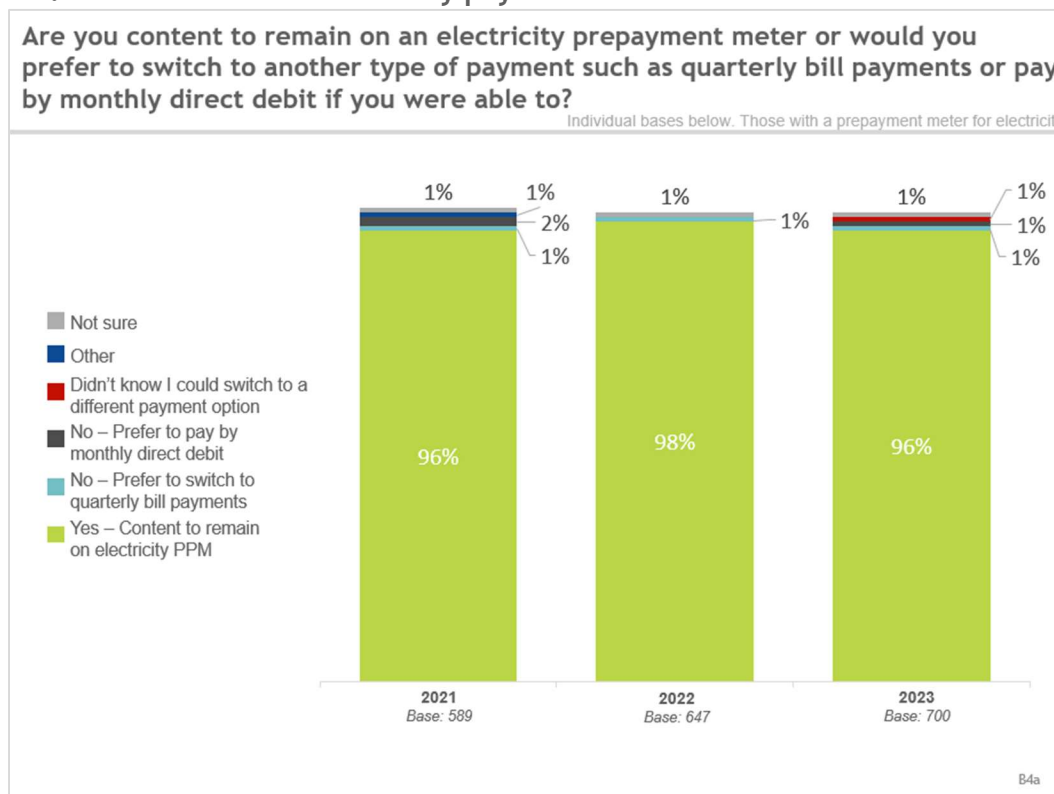


Table 5.4 Reasons for having a prepayment meter for electricity by demographics

	Age				
	Overall Base: 700	Under 35 Base: 139	35-44 Base: 154	45-64 Base: 255	65 plus Base: 138
It is convenient	78%	75%	70%	78%	86%
The property came with one	31%	43%	43%	27%	17%
Offered one by supplier	1%	1%	-	2%	1%
To help budget energy costs	29%	13%	34%	32%	28%
Don't need to worry about being cut off due to not paying a bill	1%	-	2%	1%	1%
To monitor energy use	33%	12%	41%	33%	39%
Given one as part of debt collection	0%	-	-	0%	-
Never been given the option to move away from a prepayment meter	1%	1%	1%	1%	-
Don't know	0%	-	-	1%	-

The vast majority (96%) of respondents with a prepayment meter stated they were content to remain with one, while 1% confirmed that they would prefer to switch to quarterly payments or to monthly payments.

Figure 5.13 Preference for electricity payment method



Gas

Convenience (75%) was also the most common reason for having a gas prepayment meter. Much like with electricity, the percentage of respondents using a prepayment meter to monitor their energy usage has risen from 5% in 2022 to 34% in 2023. 31% said that their property came with a prepayment meter. Younger respondents were again the least likely group to say they have a prepayment meter to help budget energy costs (7%) and to monitor energy usage (12%) (see Figure 5.14 and Table 5.5).

Figure 5.14 Reasons for having a prepayment meter for gas

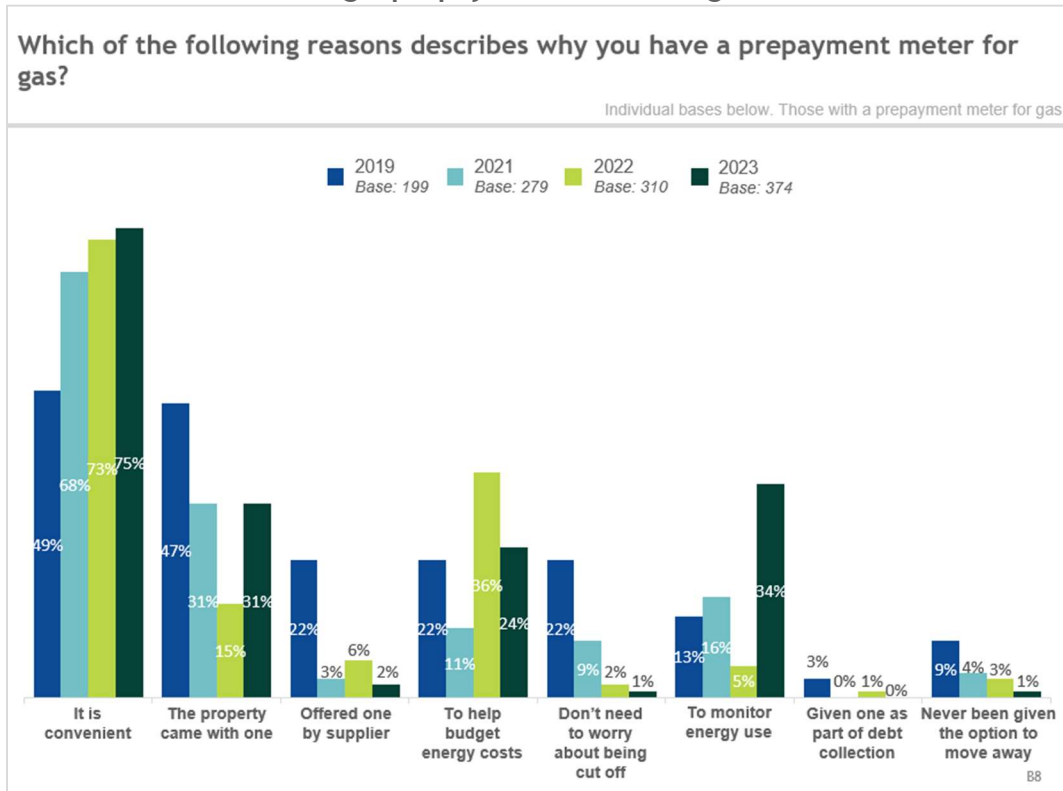
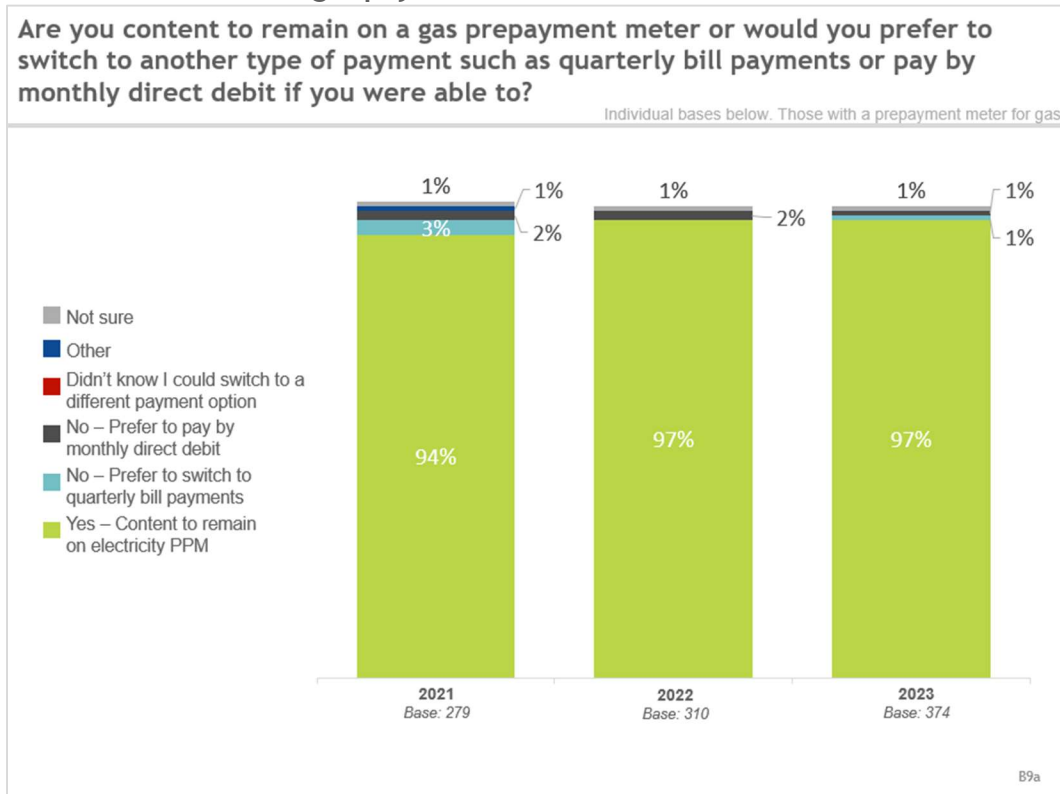


Table 5.5 Reasons for having a prepayment meter for gas by demographics

	Age				
	Overall Base: 374	Under 35 Base: 89	35-44 Base: 79	45-64 Base: 117	65 plus Base: 84
It is convenient	75%	76%	62%	83%	74%
The property came with one	31%	43%	41%	26%	19%
Offered one by supplier	2%	2%	1%	3%	2%
To help budget energy costs	24%	7%	30%	32%	19%
Don't need to worry about being cut off due to not paying a bill	1%	-	1%	1%	2%
To monitor energy use	34%	12%	38%	39%	44%
Given one as part of debt collection	0%	-	-	1%	-
Never been given the option to move away from a prepayment meter	1%	-	1%	1%	2%
Don't know	1%	-	-	1%	1%

The vast majority (97%) of respondents with a gas prepayment meter stated they were content to remain using one, whereas 1% confirmed that they would prefer to switch to either monthly or quarterly bill payments (see Figure 5.15).

Figure 5.15 Preference for gas payment method



Paying extra on bill

Respondents were informed that due to changes in the energy sector, suppliers may need to invest in a range of areas in the future, with some of these costs potentially being passed on to customers. These areas included: i) Projects to protect the environment; ii) Providing extra help for customers in vulnerable circumstances; and iii) Improving reliability of the network. Respondents were asked which areas of investment, if any, they would be willing to pay a little extra for on their bills (see Figure 5.16).

Over four in five respondents overall (83%) reported that they would not be willing to pay anything extra; this is up from 63% in 2022. 12% said they would be willing to pay extra to provide extra help for vulnerable customers (a decrease from 24% in 2022), while 9% suggested they would be willing to pay extra for projects to protect the environment (a decrease from 24% in 2022). 4% would be willing to pay extra towards improving the reliability of the network (a decrease from 13% in 2022). Respondents who have children (86%) and those who are not confident internet users (87%) were more likely to be unwilling to pay extra on their bill than those who do not have children (82%) and who are confident internet users (82%). Those who have a prepayment meter for electricity (86%) were also more likely to say they were unwilling to pay extra compared to those who have a credit meter (81%).

Figure 5.16 Paying extra on energy bill

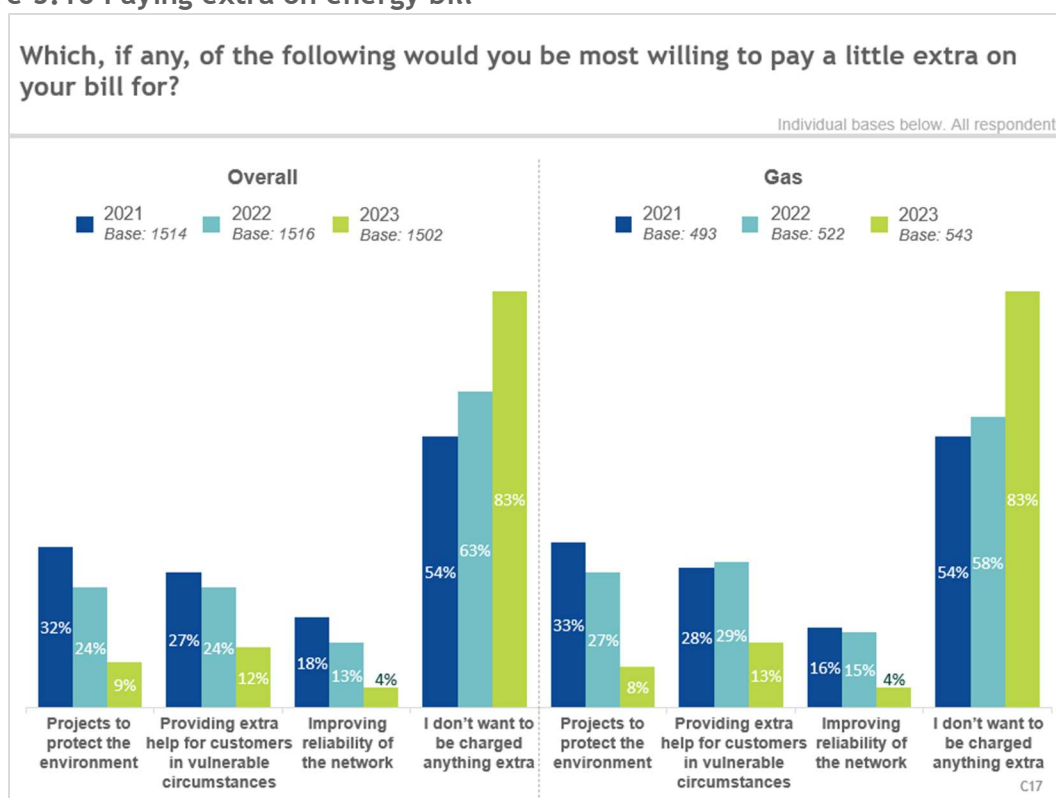


Table 5.9 Paying extra on energy bill by demographics, and payment method

		Projects to protect the environment	Providing extra help for vulnerable customers	Improving reliability of network	I don't want to be charged anything extra
Overall	All Base: 1502	9%	12%	4%	83%
Children	Yes Base: 459	7%	10%	4%	86%
	No Base: 1040	11%	13%	4%	82%
Confidence using the internet	Not confident Base: 268	8%	8%	1%	87%
	Neither Base: 221	9%	13%	6%	82%
	Confident Base: 1013	10%	13%	4%	82%
Electricity payment method	Prepayment meter Base: 700	7%	10%	2%	86%
	Credit meter Base: 802	11%	14%	6%	81%

Percentages cited in this report were calculated using unrounded figures then rounded to the nearest whole percent. Percentages for categories in the charts therefore may not sum to 100% due to rounding. Percentages cited that combine multiple response categories may not be equal to the sum of the rounded percentages for these categories.

6. Interactions with energy suppliers

In this section we examine the views of consumers towards their energy supplier in terms of:

- Understanding of written correspondence;
- Trust; and
- Satisfaction.

We also assess the methods of communication used by energy suppliers. The topics covered are as follows:

- Contact with supplier other than making a complaint;
- Ease of contacting supplier; and
- Experience of interacting with energy supplier.

Key findings

- Similar proportions reported receiving correspondence from their electricity supplier in the post (38%) and via email or online (38%), while gas customers were more likely to receive correspondence through the post (52%, compared to 19% through email or online).
- There has been a decrease in customer engagement with written communications received from their supplier. 66% of electricity customers reported either glancing at or reading their correspondence in full (compared to 77% in 2022) while 64% of gas consumers reported either glancing at it or reading their correspondence in full (compared to 70% in 2022).
- Of those respondents who had glanced at or read their written correspondence, there has been an increase in understanding of this correspondence. 83% of electricity respondents agreed or strongly agreed that the information was clear and understandable (compared to 73% in 2022). 81% of gas consumers agreed or strongly agreed that the information was clear and understandable (compared to 77% in 2022).
- There has been an increase in consumer trust in their electricity suppliers:
 - 70% of electricity consumers said they trust their supplier to treat them fairly (compared to 63% in 2022); and
 - 61% stated they trusted their supplier to give them a fair price (compared to 52% in 2022).
- A similar pattern can be observed with gas customers:
 - 64% trusted their supplier to treat them fairly (compared to 52% in 2022); and
 - 56% trusted their supplier to give them a fair price (compared to 45% in 2022).
- There has been an increase in consumer satisfaction with overall service from suppliers:
 - 84% of domestic consumers reported satisfaction with their electricity supplier (compared to 74% in 2022); and
 - 82% were satisfied with their gas supplier (compared to 70% in 2022).
- 9% contacted their electricity supplier in the last year for a reason other than making a complaint. The most common reasons for this was; switching their energy contract (33%), payment issues (24%), and querying a bill (23%).

- Of those that made contact; 78% found it easy to get in touch, 83% thought they were listened to, 81% felt they were treated fairly, and 80% said that their electricity supplier was supportive.

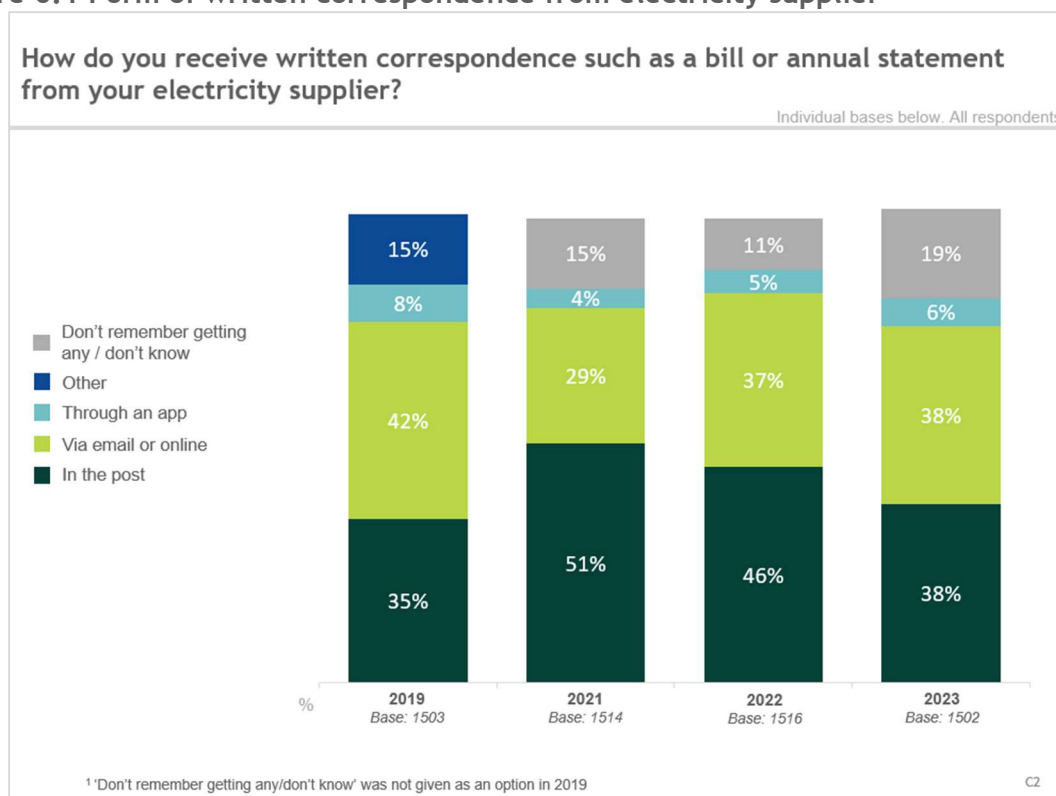
Written correspondence

Respondents were asked in what form they receive written correspondence from their supplier.

Electricity

Around two in five (38%) of domestic consumers say they receive written correspondence from their electricity supplier in the post, while a further 38% receive it via email or online. One in five (19%) respondents did not remember receiving any correspondence or were unsure in what form it came. Respondents who have a prepayment meter for electricity (30%) were more likely to be unsure how they receive written correspondence from their supplier than those who have a credit meter (8%) (see Figure 6.1).

Figure 6.1 Form of written correspondence from electricity supplier



The following significant differences were observed (see Table 6.1):

- Almost half (47%) of respondents aged 65 and over said they receive their correspondence in the post, compared to one third (33%) of those in the 18 to 34 year old group. Those in the younger age group (24%) were more likely than those in the older group (16%) to report that they do not remember receiving any correspondence or in what form it arrives in;
- Those in the C2DE group (23%) were more likely to say they were unaware what form they receive correspondence in than those in the ABC1 group (13%);

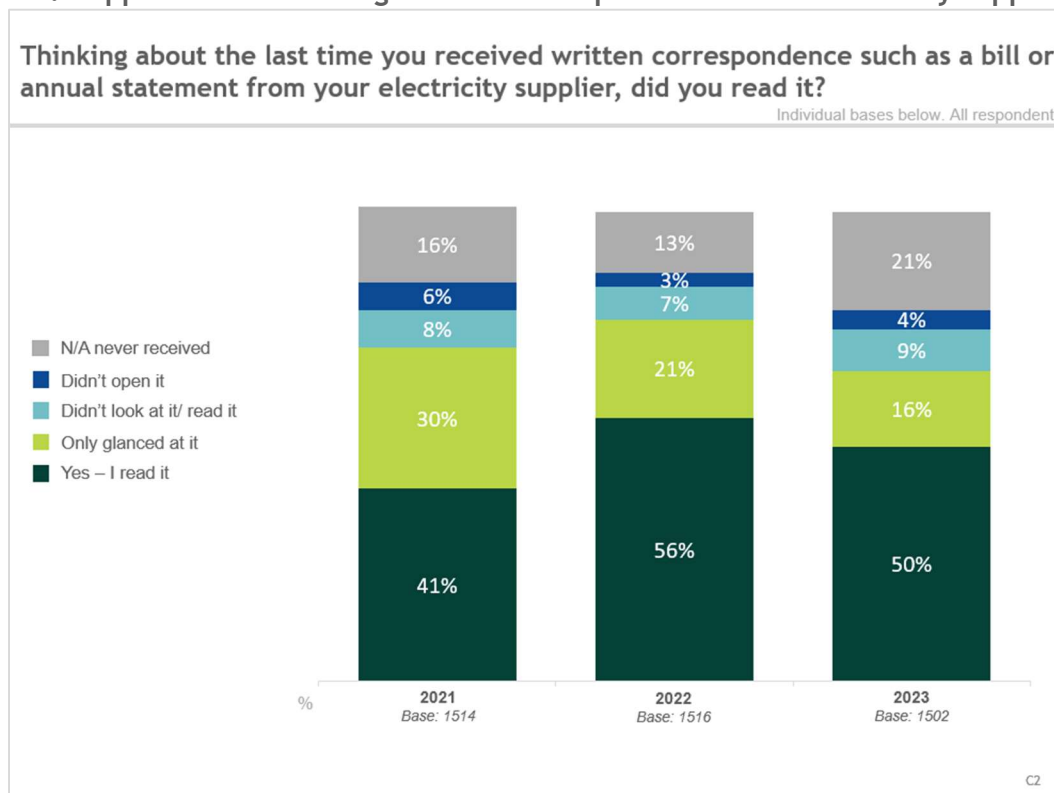
- Respondents living in the most deprived areas (31%) were more likely than all other respondents to mention that they were not sure how they receive written correspondence from their electricity supplier;
- One third (33%) of those living in social housing and one quarter (26%) who privately rent said they do not remember receiving any written correspondence, compared to 14% of those who own their home;
- Two in five (41%) of those who do not have children said they receive their written correspondence in the post, while 44% of those who have children mentioned receiving theirs via email or online. Respondents who have children (8%) were also more likely to receive written correspondence through an app than those who do not have children (5%);
- Respondents in the high or medium vulnerability group (41%, compared to 35% who are not vulnerable) were more likely to report receiving their written correspondence in the post;
- Those who do not consider themselves to be confident internet users (25%) were more likely to be unsure what format they receive written correspondence in when compared with those who are confident internet users (17%);
- Half (50%) of those who have switched electricity supplier in the last three years were more likely to receive written correspondence via email or online, compared to 31% of non-switchers;
- Respondents who have self-disconnected from their electricity supply (25%) were more likely to say they did not remember receiving written correspondence from their electricity supplier than those who have not self-disconnected (18%).

Table 6.1 Form of written correspondence from electricity supplier by demographics, deprivation, tenure, children, vulnerability, confidence using the internet, electricity payment method, electricity switching, and electricity self-disconnection

		In the post	Email / online	Through an app	Not sure	Total
Overall	All Base: 1502	38%	38%	6%	19%	100%
Age	Under 35 Base:215	33%	37%	6%	24%	100%
	35-44 Base: 263	36%	40%	8%	17%	100%
	45-64 Base:572	34%	40%	7%	19%	100%
	65 plus Base: 422	47%	34%	3%	16%	100%
SEG	ABC1 Base: 730	37%	44%	6%	13%	100%
	C2DE Base: 727	39%	32%	6%	23%	100%
MDM Quintile	1 - Most deprived Base: 286	37%	26%	5%	31%	100%
	2 Base: 299	40%	36%	7%	17%	100%
	3 Base: 310	37%	42%	4%	16%	100%
	4 Base: 310	39%	38%	8%	15%	100%
	5 - Least deprived Base: 297	35%	46%	4%	14%	100%
Tenure	Own home Base: 1078	37%	42%	6%	14%	100%
	Private renting Base: 163	37%	29%	7%	26%	100%
	Social housing Base: 231	39%	23%	5%	33%	100%
Children	Yes Base: 459	30%	44%	8%	18%	100%
	No Base: 1040	41%	35%	5%	19%	100%
Vulnerability	High/medium vulnerability Base: 706	41%	35%	5%	18%	100%
	Low vulnerability Base: 63	32%	48%	6%	14%	100%
	Not vulnerable Base: 733	35%	40%	6%	20%	100%
Confidence using the internet	Not confident Base: 268	53%	17%	4%	25%	100%
	Neither Base: 221	42%	34%	5%	19%	100%
	Confident Base: 1013	33%	44%	6%	17%	100%
Electricity payment method	Prepayment meter Base: 700	38%	25%	6%	30%	100%
	Credit meter Base: 802	38%	49%	5%	8%	100%
Electricity switching	Switchers Base: 541	25%	50%	6%	18%	100%
	Non-switchers Base: 961	45%	31%	5%	19%	100%
Electricity self-disconnection	Yes Base: 168	40%	31%	4%	25%	100%
	No Base: 1325	38%	39%	6%	18%	100%

Two thirds (66%) stated that they read or glanced at the latest correspondence they received from their electricity supplier (down from 77% in 2022), while 13% did not look at it or open it. One fifth (21%) reported that they did not receive any written correspondence from their electricity supplier, compared to 13% in 2022. Three in five (59%) credit customers said that they read the last piece of written correspondence they received from their supplier, compared to two in five (39%) of those with a prepayment meter for electricity. Those on a prepayment meter (33%) were also more likely to report that they had not received any correspondence when compared with those who have a credit meter (10%) (see Figure 6.2 and Table 6.2).

Figure 6.2 Approach to receiving written correspondence from electricity supplier



The following significant differences were also observed (see Table 6.2):

- Respondents aged 65 and over (59%) were more likely than those aged 18 to 34 (42%) or 35 to 44 (42%) to say they read the last piece of correspondence from their electricity supplier. Those in the younger age group (27%, compared to 18% aged 65 plus) were also more likely to report not receiving any correspondence;
- Those in the ABC1 group (55%) were more likely to read the last piece of correspondence they received than those in the C2DE group (46%), who were instead more likely to suggest they had not received any correspondence (26%, compared to 15% in the ABC1 group);
- One quarter (24%) of respondents living in urban areas stated they did not receive any written correspondence from their electricity supplier, compared to 16% of rural respondents;
- Respondents living in the most deprived areas (33%) were more likely than all other respondents to report that they did not receive any written correspondence from their electricity supplier. In contrast, 57% of those in the least deprived areas said they read the last piece of correspondence they receive, compared to 42% in the most deprived areas;

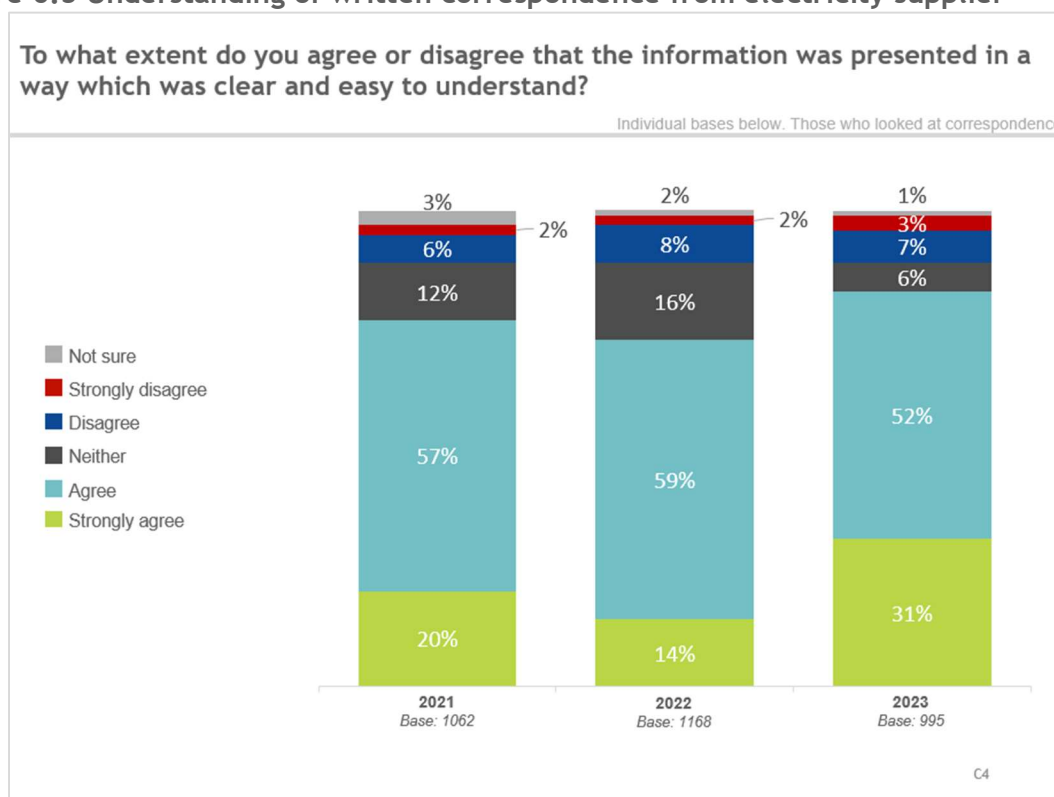
- Those who own their home (53%) were more likely than respondents who privately rent (42%) and who live in social housing (39%) to say that they read the correspondence they last received from their electricity supplier;
- Over half (52%) of those who do not have children confirmed that they read the correspondence, compared to 45% of respondents who do have children;
- Respondents who consider themselves to be confident internet users (53%) were more likely to report reading the last piece of correspondence they received than those who consider themselves to not be confident internet users (40%). Those who do not consider themselves confident internet users were also more likely to suggest they did not receive any correspondence (26%, compared to 19% of confident users);
- Electricity switchers (54%) were more likely to state they read the correspondence than those who have not switched supplier in the last three years (48%); and
- 22% of respondents who have self-disconnected from their electricity supply confirmed that they did not read or open the last piece of correspondence they received, compared to 11% of those who have not self-disconnected. Respondents who have self-disconnected were also more likely to state that they never received any correspondence (29%, compared to 20% that have not self-disconnected).

Table 6.2 Approach to receiving written correspondence from electricity supplier by demographics, location, deprivation, tenure, children, confidence using the internet, electricity payment method, electricity switching, and electricity self-disconnection

		Read it	Only glanced at it	Didn't look at it / read it	Didn't open it	N/A never received	Total
Overall	All Base: 1502	50%	16%	9%	4%	21%	100%
Age	Under 35 Base:215	42%	18%	8%	4%	27%	100%
	35-44 Base: 263	42%	17%	16%	5%	20%	100%
	45-64 Base:572	50%	17%	8%	4%	21%	100%
	65 plus Base: 422	59%	13%	6%	3%	18%	100%
SEG	ABC1 Base: 730	55%	17%	9%	4%	15%	100%
	C2DE Base: 727	46%	15%	9%	4%	26%	100%
Location	Urban Base:905	51%	15%	8%	3%	24%	100%
	Rural Base:597	49%	18%	12%	5%	16%	100%
MDM Quintile	1 - Most deprived Base: 286	42%	15%	8%	2%	33%	100%
	2 Base: 299	49%	15%	11%	5%	20%	100%
	3 Base: 310	46%	17%	11%	5%	20%	100%
	4 Base: 310	55%	17%	8%	4%	16%	100%
	5 - Least deprived Base: 297	57%	16%	8%	3%	15%	100%
Tenure	Own home Base: 1078	53%	17%	9%	4%	16%	100%
	Private renting Base: 163	42%	14%	10%	4%	29%	100%
	Social housing Base: 231	39%	14%	8%	4%	35%	100%
Children	Yes Base: 459	45%	18%	12%	5%	21%	100%
	No Base: 1040	52%	16%	8%	4%	21%	100%
Confidence using the internet	Not confident Base: 268	40%	19%	11%	4%	26%	100%
	Neither Base: 221	49%	15%	10%	6%	20%	100%
	Confident Base: 1013	53%	16%	8%	3%	19%	100%
Electricity payment method	Prepayment meter Base: 700	39%	14%	9%	4%	33%	100%
	Credit meter Base: 802	59%	18%	9%	4%	10%	100%
Electricity switching	Switchers Base: 541	54%	16%	7%	3%	21%	100%
	Non-switchers Base: 961	48%	17%	10%	5%	21%	100%
Electricity self-disconnection	Yes Base: 168	33%	16%	15%	7%	29%	100%
	No Base: 1325	52%	16%	8%	3%	20%	100%

Of those who glanced at or read the written correspondence they received, over four in five (83%) agreed or strongly agreed that the information had been presented in a way which was clear and easy to understand, compared to 10% who did not think that this was the case. This compares to 73% and 10% respectively from the 2022 Tracker (see Figure 6.3).

Figure 6.3 Understanding of written correspondence from electricity supplier



Subgroup analysis revealed that those respondents with or who live with someone who has a disability or illness (15%) were more likely to disagree that the information was clear and easy to understand than those who do not have someone with a disability or illness in their household (9%). Electricity switchers (14%) and those who self-disconnected from their electricity supply (20%) were also more likely to disagree than those who have not switched supplier in the last three years (9%) and who have not self-disconnected (9%).

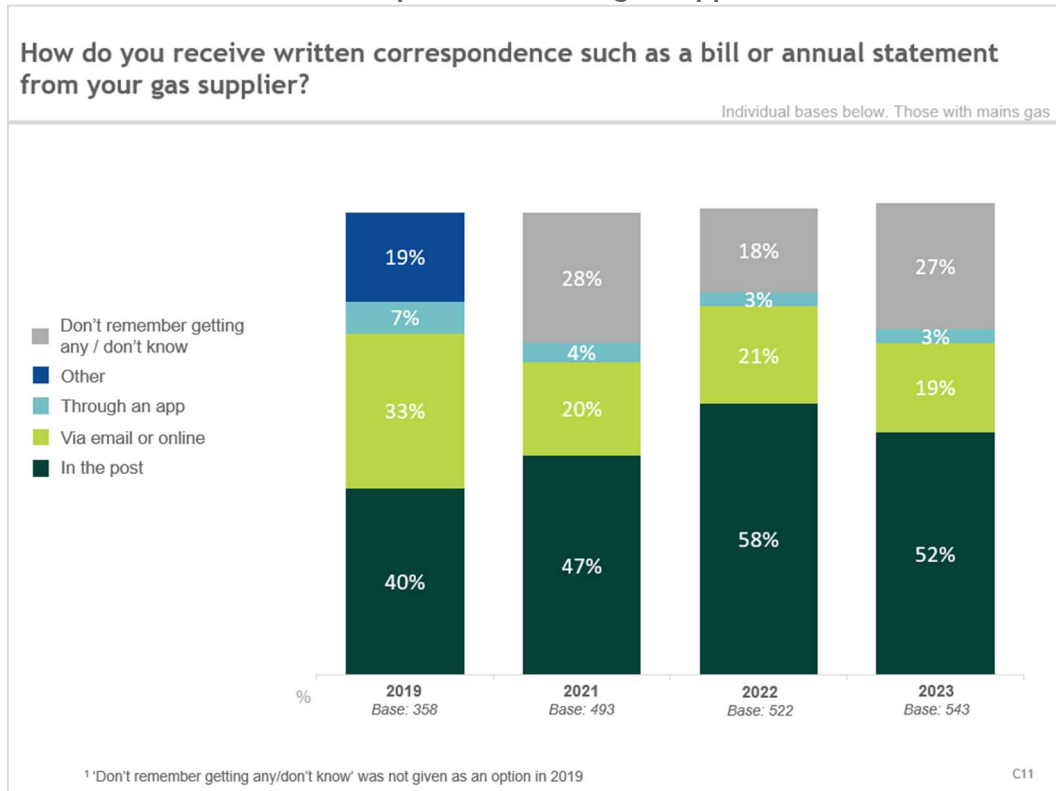
Table 6.3 Understanding of written correspondence from electricity supplier by disability/illness, electricity switching, and electricity self-disconnection

		Disagree	Neither	Agree	Not sure	Total
Overall	All Base: 995	10%	6%	83%	1%	100%
Disability/ illness	Yes Base: 181	15%	8%	76%	1%	100%
	No Base: 789	9%	6%	85%	0%	100%
Electricity switching	Switchers Base: 375	14%	6%	81%	-	100%
	Non-switchers Base: 620	9%	6%	84%	1%	100%
Electricity self-disconnection	Yes Base: 83	20%	7%	72%	-	100%
	No Base: 908	9%	6%	84%	1%	100%

Gas

Those with gas heating were more likely to receive correspondence from their supplier through the post (52%), while one in five (19%) obtain theirs in an email or online. 27% stated that they did not remember receiving any written correspondence from their supplier or in what form it came, increasing from 18% in 2022. One third (35%) of respondents who have a gas prepayment meter stated that they were not sure whether they had received any correspondence, compared to 7% of credit customers (see Figure 6.4 and Table 6.4).

Figure 6.4 Form of written correspondence from gas supplier



The following significant differences were also observed (see Table 6.4):

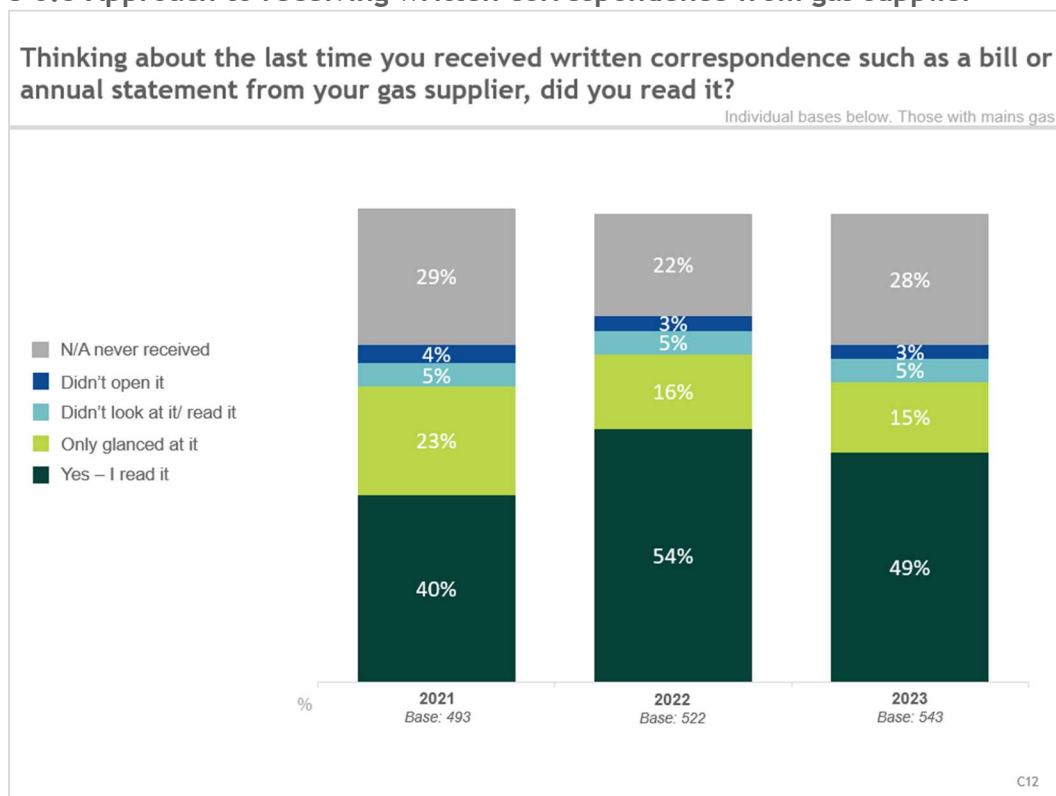
- Respondents aged 18 to 34 (41%) were more likely than those aged 65 plus (21%) to report that they were not sure in what format they receive written correspondence from their gas supplier;
- 30% of gas customers in the C2DE group did not know the form of correspondence, compared to 21% in the ABC1 group;
- Respondents living in the most deprived areas (36%) were more likely than those in the least deprived areas (17%) to not remember what format they receive written correspondence in;
- Those who privately rent (46%) and who live in social housing (36%) were more likely to not be aware of the correspondence format, compared to 17% of those who own their home;
- Respondents who are considered to be in the high or medium vulnerability group (56%) were more likely to receive their correspondence in the post than those who are not vulnerable (46%).

Table 6.4 Form of written correspondence from gas supplier by demographics, deprivation, tenure, vulnerability, and payment method

		In the post	Email / online	Through an app	Not sure	Total
Overall	All Base: 543	52%	19%	3%	27%	100%
Age	Under 35 Base:111	41%	15%	2%	41%	100%
	35-44 Base:108	51%	23%	2%	24%	100%
	45-64 Base: 171	54%	18%	5%	23%	100%
	65 plus Base: 142	59%	18%	1%	21%	100%
SEG	ABC1 Base: 226	54%	23%	2%	21%	100%
	C2DE Base: 298	50%	17%	3%	30%	100%
MDM Quintile	1 - Most deprived Base: 192	47%	14%	2%	36%	100%
	2 Base: 87	59%	16%	5%	21%	100%
	3 Base: 66	44%	23%	5%	29%	100%
	4 Base: 69	57%	20%	1%	22%	100%
	5 - Least deprived Base: 129	55%	26%	2%	17%	100%
Tenure	Own home Base: 295	55%	25%	3%	17%	100%
	Private renting Base: 70	41%	11%	1%	46%	100%
	Social housing Base: 165	51%	11%	2%	36%	100%
Vulnerability	High/medium vulnerability Base: 282	56%	18%	1%	24%	100%
	Low vulnerability Base: 24	54%	25%	-	-	100%
	Not vulnerable Base: 237	46%	19%	4%	30%	100%
Gas payment method	Prepayment meter Base: 374	50%	12%	2%	35%	100%
	Credit meter Base: 169	55%	35%	3%	7%	100%

Half (49%) of gas customers stated that they read the last written correspondence they received from their supplier with 15% saying they only glanced at it. Although 8% said they neither read nor opened it, a further 28% reported to have never received any correspondence. Over one third (36%) of respondents who have a prepayment meter for gas said they never received any correspondence, compared to 9% of those on a credit meter. (see Figure 6.5 and Table 6.6).

Figure 6.5 Approach to receiving written correspondence from gas supplier



Subgroup analysis also revealed the following significant differences (see Table 6.5):

- Respondents aged 65 and over (61%) were more likely to confirm that they read the correspondence than those aged 18 to 34 (37%), who were the most likely age group to report never receiving any correspondence from their gas supplier (43%);
- Those living in the most deprived areas (37%) were more likely than those living in the least deprived areas (18%) to say they never received correspondence;
- 37% of respondents who self-disconnected from their gas supply said they never received any correspondence from their supplier, compared to one quarter (26%) of those who have not self-disconnected.

Table 6.5 Approach to receiving written correspondence from electricity supplier by demographics, deprivation, gas payment method, and gas self-disconnection

		Read it	Glanced at it	Didn't read it	Didn't open it	Never received	Total
Overall	All Base: 543	49%	15%	5%	3%	28%	100%
Age	Under 35 Base: 111	37%	9%	7%	4%	43%	100%
	35-44 Base: 108	41%	20%	7%	4%	28%	100%
	45-64 Base: 171	51%	19%	4%	4%	22%	100%
	65 plus Base: 142	61%	10%	4%	2%	23%	100%
MDM Quintile	1 - Most deprived Base: 192	40%	14%	6%	4%	37%	100%
	2 Base: 87	53%	16%	3%	3%	24%	100%
	3 Base: 66	50%	14%	5%	3%	29%	100%
	4 Base: 69	52%	10%	10%	3%	25%	100%
	5 - Least deprived Base: 129	57%	19%	3%	3%	18%	100%
Gas payment method	Prepayment meter Base: 374	42%	13%	5%	3%	36%	100%
	Credit meter Base: 169	64%	18%	6%	3%	9%	100%
Gas self-disconnection	Yes Base: 89	39%	17%	3%	3%	37%	100%
	No Base: 449	51%	14%	5%	3%	26%	100%

Four in five (81%) agreed or strongly agreed that the information they had received was presented in a way which was clear and easy for them to understand, with gas customers who have a prepayment meter (85%) more likely to agree than those with a credit meter (75%). 13% disagreed or strongly disagreed with this (see Figure 6.6 and Table 6.5).

Figure 6.6 Understanding of written correspondence from gas supplier

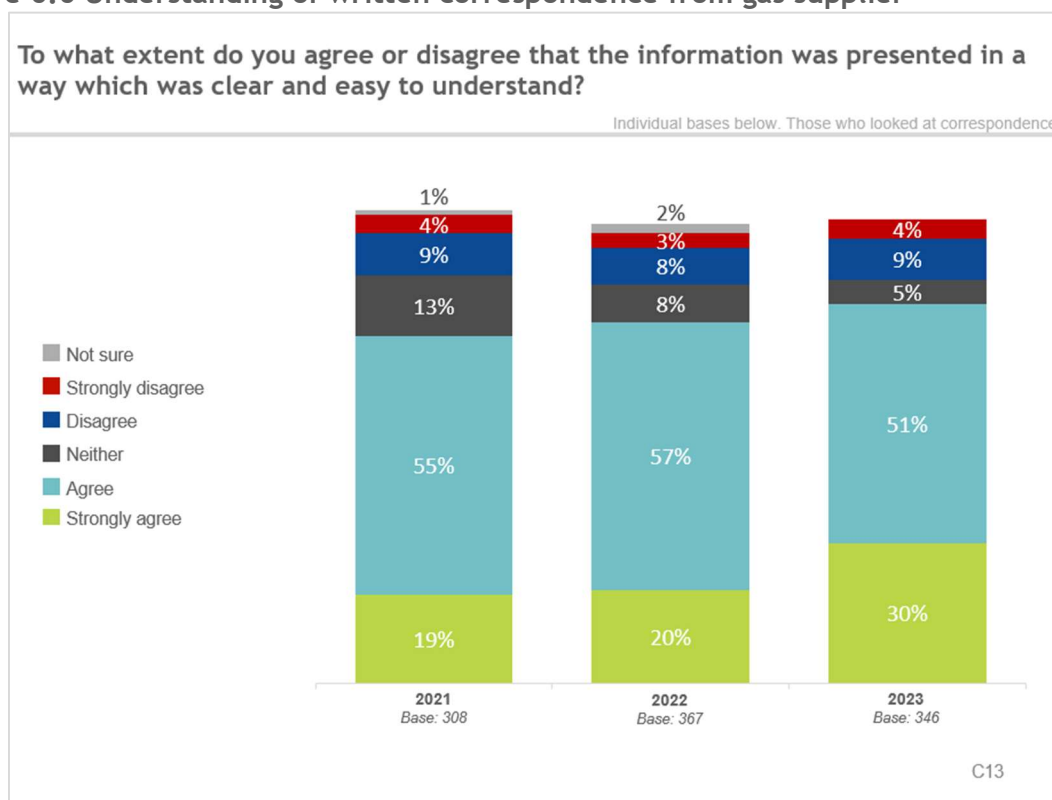


Table 6.6 Understanding of written correspondence from gas supplier by payment method

		Disagree	Neither	Agree	Not sure	Total
Overall	All Base: 346	13%	5%	81%	0%	100%
Gas payment method	Prepayment meter Base: 207	11%	4%	85%	0%	100%
	Credit meter Base: 139	17%	8%	75%	-	100%

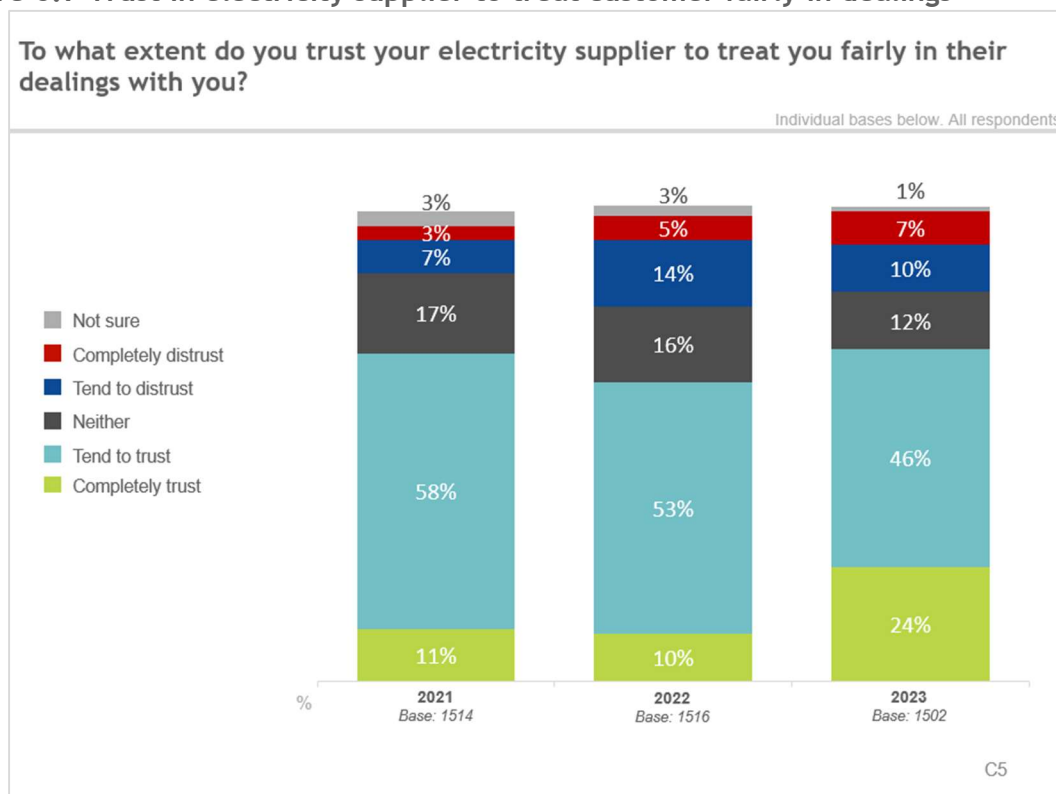
Level of trust in electricity or gas supplier

Respondents were asked to what extent they trust their electricity or gas supplier to give them clear information and a fair price.

Electricity

70% of domestic consumers trust their electricity supplier to treat them fairly in their dealings, compared to 17% who do not trust their supplier to treat them fairly. The proportion of respondents who 'completely trust' their supplier has increased from 10% in 2022 to 24% (see Figure 6.7).

Figure 6.7 Trust in electricity supplier to treat customer fairly in dealings



The following significant differences between those who trust and distrust their electricity supplier to treat them fairly were observed (see Table 6.7):

- Respondents aged 65 and over (79%) were more likely than all other age groups to say they trust their electricity supplier to treat them fairly. Those in the older age group were also the least likely to say they distrust their electricity supplier (10%, compared to 18% aged 18 to 34, 24% aged 35 to 44, and 19% aged 45 to 64);
- One quarter (25%) of those who have children in their household said they do not trust their electricity supplier to treat them fairly, compared to 14% of those who have children;
- Just under one fifth (18%) of respondents who have access to the internet said they do not trust their electricity supplier to treat them fairly, compared to 3% of those who do not have internet access. Those who indicated they were confident internet users (18%) were also more likely to report distrust than those who are not confident users (11%);
- Respondents who have switched electricity supplier in the last three years (21%) were more likely to distrust their supplier to treat them fairly than those who have not switched (15%);

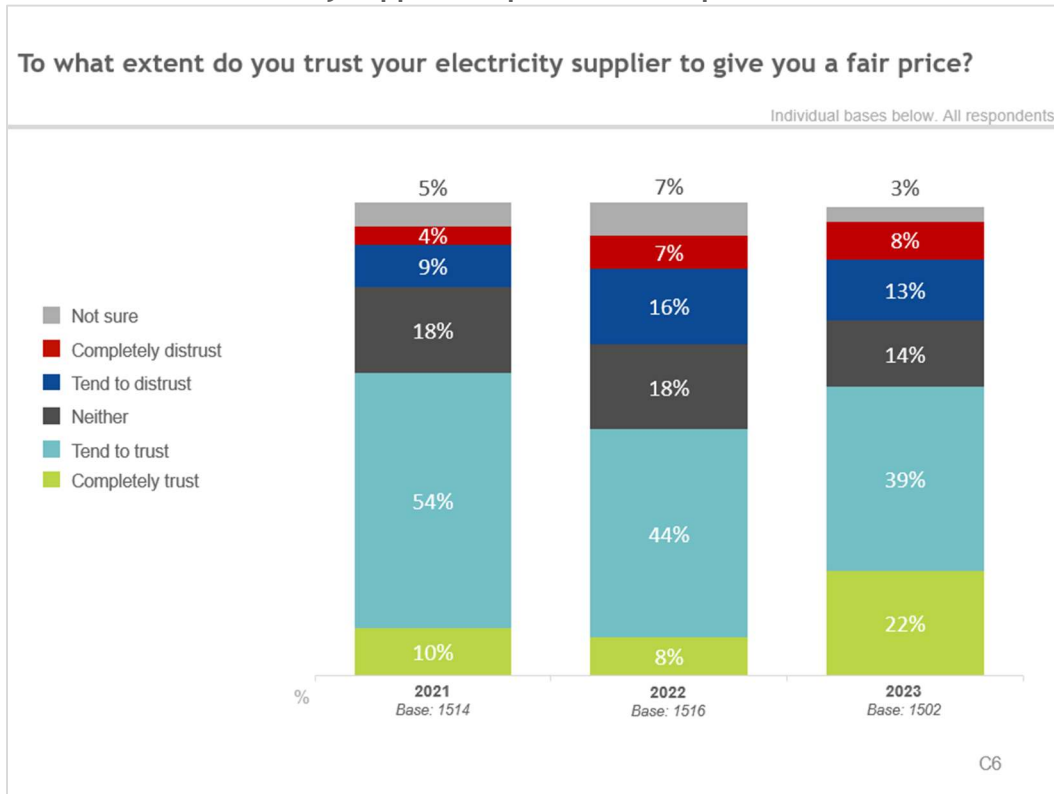
- Those who have self-disconnected from their electricity supply (26%) were more likely to indicate distrust than those who have not self-disconnected (16%).

Table 6.7 Trust in electricity supplier to treat customers fairly by demographics, children, access to the internet, confidence using the internet, electricity switching, and electricity self-disconnection

		Distrust	Neither	Trust	Not sure	Total
Overall	All Base: 1502	17%	12%	70%	1%	100%
Age	Under 35 Base: 215	18%	14%	67%	-	100%
	35-44 Base: 263	24%	15%	60%	1%	100%
	45-64 Base: 572	19%	11%	69%	2%	100%
	65 plus Base: 422	10%	10%	79%	2%	100%
Children	Yes Base: 459	25%	12%	61%	2%	100%
	No Base: 1040	14%	12%	73%	1%	100%
Internet access	Yes Base: 1401	18%	12%	69%	1%	100%
	No Base: 101	3%	15%	79%	3%	100%
Confidence using the internet	Not confident Base: 268	11%	11%	76%	2%	100%
	Neither Base: 221	22%	14%	63%	2%	100%
	Confident Base: 1013	18%	12%	69%	1%	100%
Electricity switching	Switchers Base: 541	21%	13%	65%	1%	100%
	Non-switchers Base: 961	15%	11%	73%	2%	100%
Electricity self-disconnection	Yes Base: 168	26%	14%	60%	1%	100%
	No Base: 1325	16%	12%	71%	1%	100%

Three in five (61%) respondents said they trust their supplier to give a fair price, including one fifth (22%) who 'completely trust' their supplier (compared to 8% in 2022). This compares to one fifth (21%) who did not trust their supplier to provide a fair price (see Figure 6.8).

Figure 6.8 Trust in electricity supplier to provide a fair price



The following significant differences were observed in terms of trusting their electricity supplier to provide a fair price (see Table 6.8):

- Respondents aged 65 and over (69%) were again more likely than all other age groups to say they trust their electricity supplier to provide a fair price, while also being the least likely to indicate distrust (14%, compared to 21% aged 18 to 34, 29% aged 35 to 44, and 22% aged 45 to 64);
- Those who have children in their household (29%) were more likely to report distrust than those who do not have children (18%);
- Over one fifth (22%) of respondents who have access to the internet stated they distrust their electricity supplier to provide a fair price, compared to 12% who do not have internet access. Those who consider themselves to not be confident internet users (6%) were also more likely to be unsure than confident users (2%);
- Electricity switchers (25%) and those who self-disconnected from their electricity supply (33%) were more likely to indicate distrust than those who have not switched electricity supplier in the last three years (19%) and who have not self-disconnected (20%).

Table 6.8 Trust in electricity supplier to provide a fair price by demographics, children, access to the internet, confidence using the internet, electricity switching, and electricity self-disconnection

		Distrust	Neither	Trust	Prefer not to say	Not sure	Total
Overall	All Base: 1502	21%	14%	61%	0%	3%	100%
Age	Under 35 Base: 215	21%	17%	60%	-	1%	100%
	35-44 Base: 263	29%	17%	50%	-	3%	100%
	45-64 Base: 572	22%	13%	62%	-	3%	100%
	65 plus Base: 422	14%	13%	69%	0%	4%	100%
Children	Yes Base: 459	29%	16%	54%	-	2%	100%
	No Base: 1040	18%	14%	65%	0%	4%	100%
Internet access	Yes Base: 1401	22%	14%	61%	0%	3%	100%
	No Base: 101	12%	18%	63%	-	7%	100%
Confidence using the internet	Not confident Base: 268	19%	15%	60%	-	6%	100%
	Neither Base: 221	24%	15%	58%	0%	2%	100%
	Confident Base: 1013	21%	14%	62%	-	2%	100%
Electricity switching	Switchers Base: 541	25%	14%	59%	-	2%	100%
	Non-switchers Base: 961	19%	14%	63%	0%	4%	100%
Electricity self-disconnection	Yes Base: 168	33%	16%	47%	-	4%	100%
	No Base: 1325	20%	14%	63%	0%	3%	100%

Gas

Levels of trust in gas suppliers were similar to that for electricity suppliers. Under two thirds (64%) of those with gas heating stated that they trust their supplier to treat them fairly in their dealings, compared to one fifth (19%) who said they would distrust their supplier. This compares to 52% and 25% respectively from the 2022 Tracker. 56% confirmed that they trust their supplier to provide a fair price (45% in 2022), with 23% reporting that they would not trust their supplier to do this (25% in 2022).

Figure 6.9 Trust in gas supplier to treat customer fairly in dealings

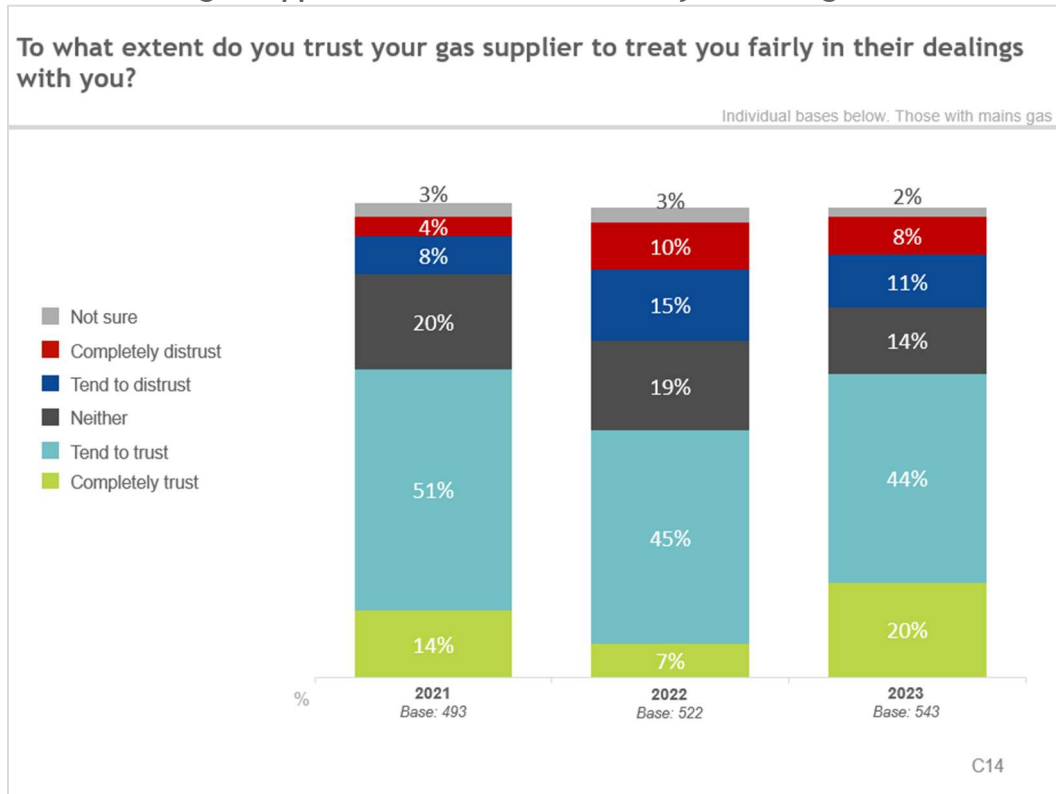
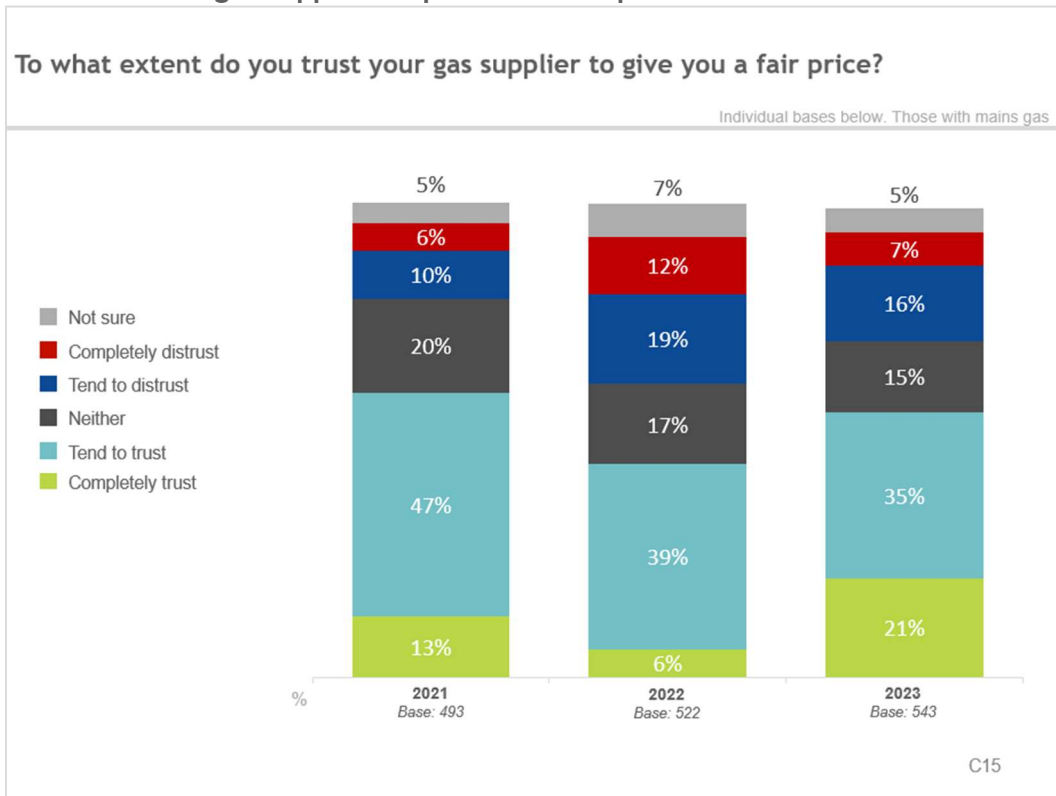


Figure 6.10 Trust in gas supplier to provide a fair price



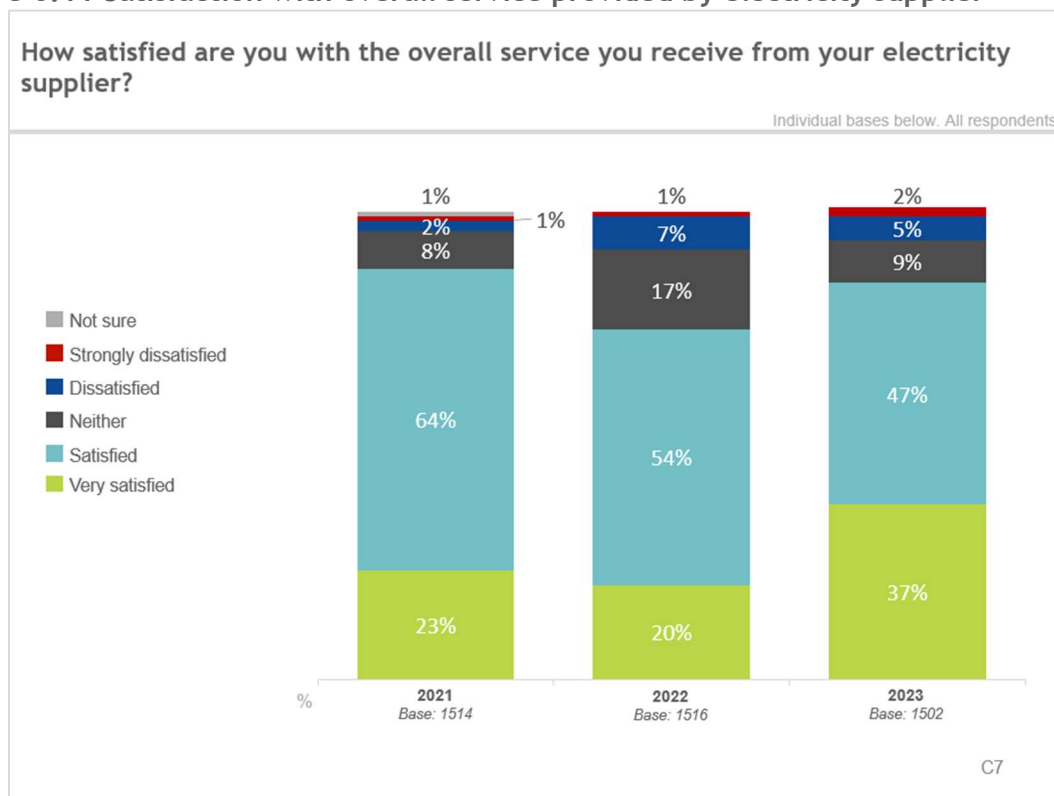
Satisfaction with overall service provided by electricity and gas suppliers

Respondents were asked to rate their level of satisfaction with their electricity and gas suppliers.

Electricity

84% of domestic consumers were satisfied or very satisfied with the service they receive from their electricity supplier, with 7% reporting dissatisfaction. This is compared to 74% who reported satisfaction and 8% who reported dissatisfaction in the 2022 Tracker (see Figure 6.11).

Figure 6.11 Satisfaction with overall service provided by electricity supplier



Despite satisfaction being high, there were some subgroups who were more likely than others to report dissatisfaction (see Table 6.9):

- 11% of respondents aged 18 to 34, 8% aged 35 to 44, and 7% aged 45 to 64 reported dissatisfaction with the service they receive from their electricity supplier. This compares to 3% aged 65 and over;
- Respondents who privately rent (11%) were more likely to state that they were dissatisfied than those who own their home (6%);
- Those who have children in their household (10%) were more likely than those without children (5%) to say they were dissatisfied; and
- 17% of those who have self-disconnected from their electricity supply said they were dissatisfied, compared to 6% of those who have not self-disconnected.

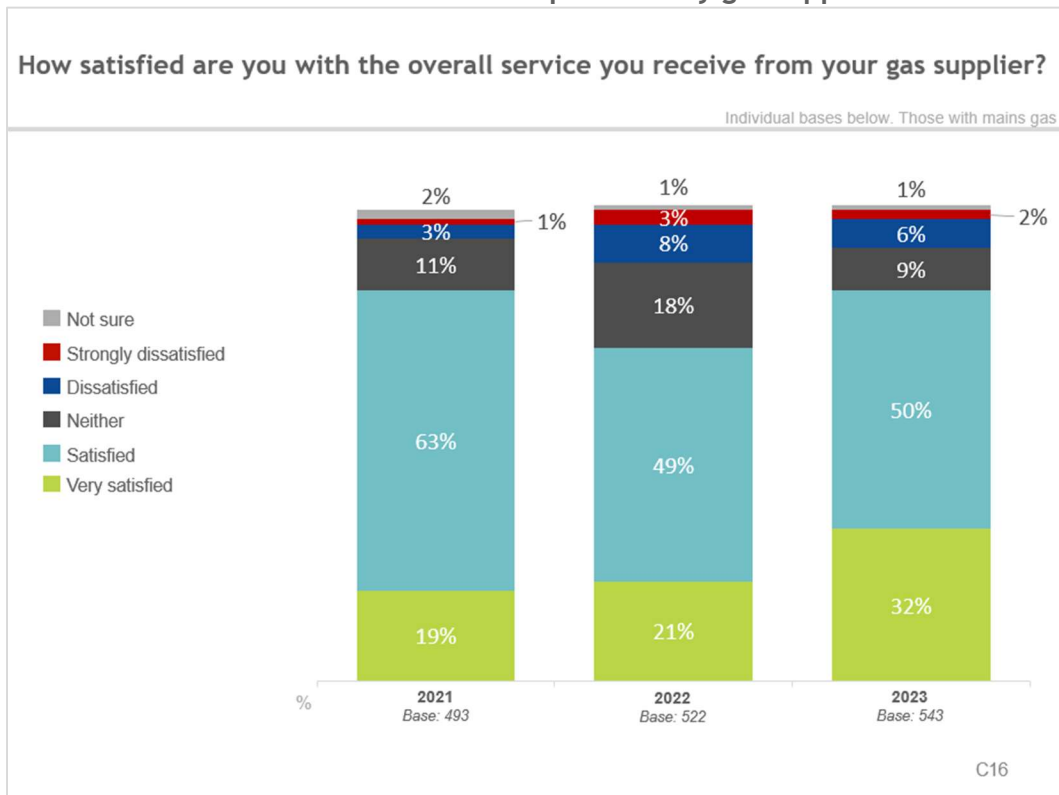
Table 6.9 Satisfaction with overall service provided by electricity supplier by demographics, tenure, children, and electricity self-disconnection

		Dissatisfied	Neither	Satisfied	Not sure	Total
Overall	All Base: 1502	7%	9%	84%	0%	100%
Age	Under 35 Base: 215	11%	8%	80%	-	100%
	35-44 Base: 263	8%	13%	79%	0%	100%
	45-64 Base: 572	7%	11%	81%	1%	100%
	65 plus Base: 422	3%	4%	92%	1%	100%
Tenure	Own home Base: 1078	6%	9%	85%	0%	100%
	Private renting Base: 163	11%	9%	80%	1%	100%
	Social housing Base: 231	9%	8%	82%	1%	100%
Children	Yes Base: 459	10%	11%	79%	1%	100%
	No Base: 1040	5%	8%	86%	0%	100%
Electricity self-disconnection	Yes Base: 168	17%	10%	73%	1%	100%
	No Base: 1325	6%	9%	85%	0%	100%

Gas

Overall, gas consumers were also satisfied with the service they receive from their supplier, with 82% saying this, compared to 8% who were dissatisfied. This compares with 70% who were satisfied and 11% who were dissatisfied in the 2022 Tracker (see Figure 6.12).

Figure 6.12 Satisfaction with overall service provided by gas supplier



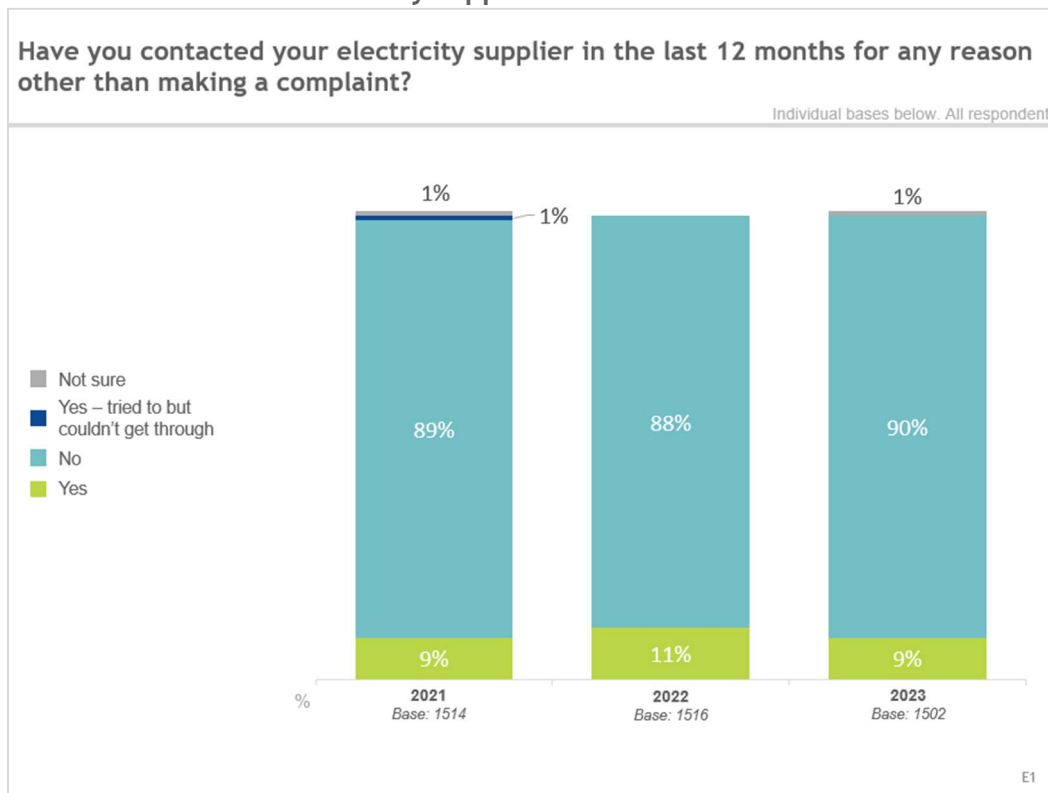
Contact with supplier

Respondents were asked whether they had contacted their energy supplier in the last year for any reason other than to make a complaint.

Electricity

9% of respondents had contacted their electricity supplier in the last 12 months (see Figure 6.13).

Figure 6.13 Contact with electricity supplier in the last 12 months



The following significant differences were observed between subgroups (see Table 6.10):

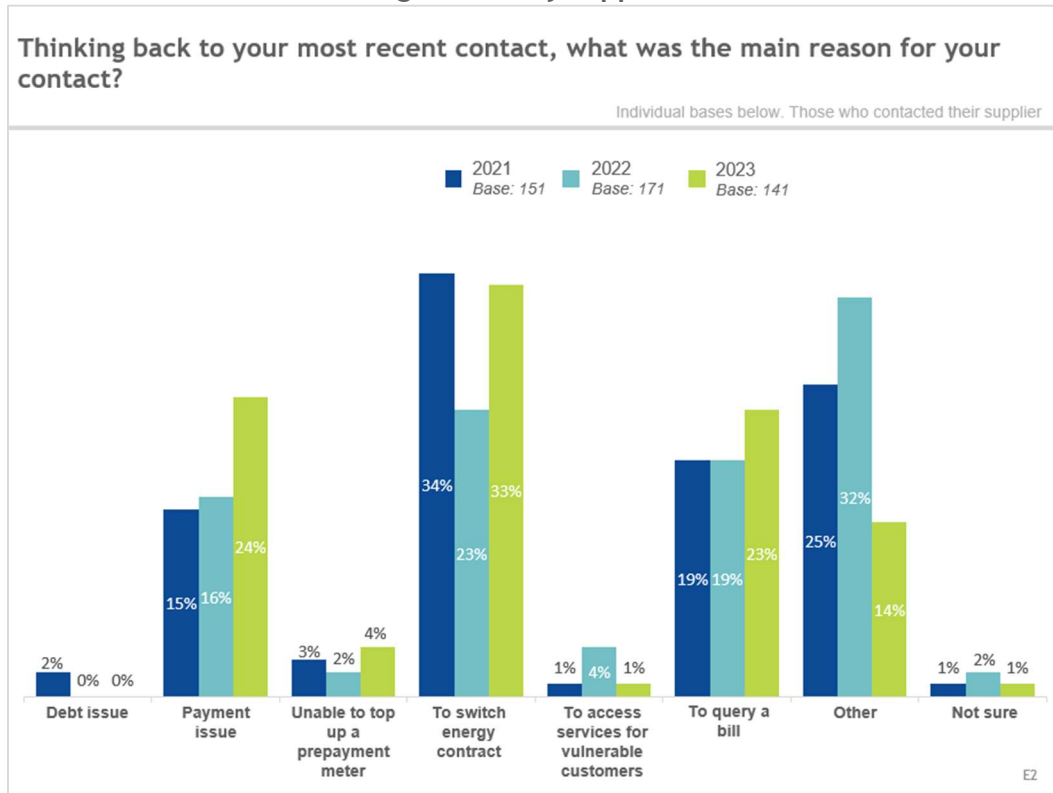
- Respondents aged 65 and over were the least likely age group to have contacted their electricity supplier in the last 12 months, with 5% saying this compared to 11% of those aged 18 to 34, 10% aged 35 to 44, and 11% aged 45 to 64;
- Those in the ABC1 group (12%) were more likely to have contacted their electricity supplier than those in the C2DE group (7%);
- 13% of respondents who have children in their household had contacted their electricity supplier, compared to 8% without children;
- 10% of those who have access to the internet indicated they had contacted their electricity supplier in the last 12 months, compared to 3% who do not have access to the internet; and
- Respondents who have switched their electricity supplier in the last three years (12%) were more likely to have been in contact with their supplier than those who have not switched (8%).

Table 6.10 Contact with electricity supplier in the last 12 months by demographics, children, internet access, and electricity switching

		Yes	No	Couldn't get through	Not sure	Total
Overall	All Base: 1502	9%	90%	0%	1%	100%
Age	Under 35 Base: 215	11%	89%	-	0%	100%
	35-44 Base: 263	10%	89%	0%	1%	100%
	45-64 Base: 572	11%	88%	0%	1%	100%
	65 plus Base: 422	5%	94%	-	1%	100%
SEG	ABC1 Base: 730	12%	88%	-	0%	100%
	C2DE Base: 727	7%	92%	0%	1%	100%
Children	Yes Base: 459	13%	86%	-	1%	100%
	No Base: 1040	8%	91%	0%	1%	100%
Internet access	Yes Base: 1401	10%	89%	0%	1%	100%
	No Base: 101	3%	96%	-	1%	100%
Electricity switching	Switchers Base: 541	12%	87%	0%	1%	100%
	Non-switchers Base: 968	8%	91%	0%	1%	100%

One third (33%) of those who had made contact did so to switch their energy contract, an increase from 23% in 2022. 24% had a payment issue they wanted to report, an increase from 16% in 2022. 23% made contact to query a bill, an increase from 19% in 2022. While there has been an increase in electricity consumers contacting their supplier to discuss payment issues, no consumers reported contacting their electricity supplier in relation to a debt issue this year.

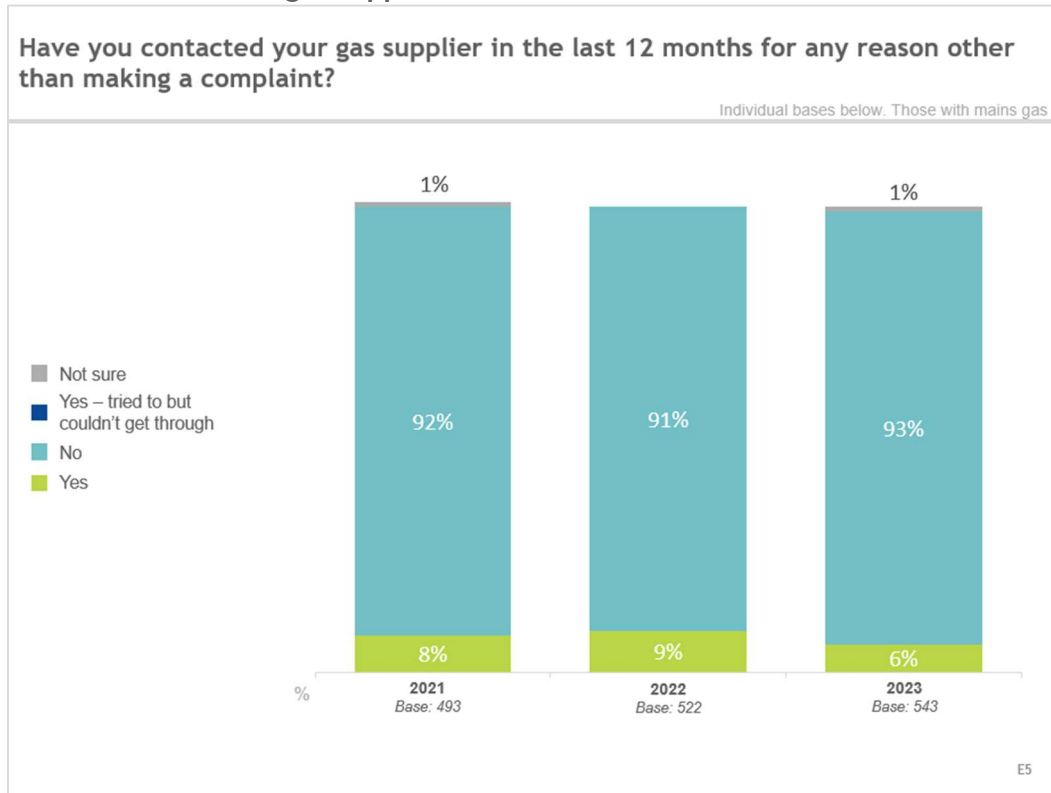
Figure 6.14 Reasons for contacting electricity supplier



Gas

6% of respondents with gas heating contacted their supplier in the last 12 months.

Figure 6.15 Contact with gas supplier in last 12 months



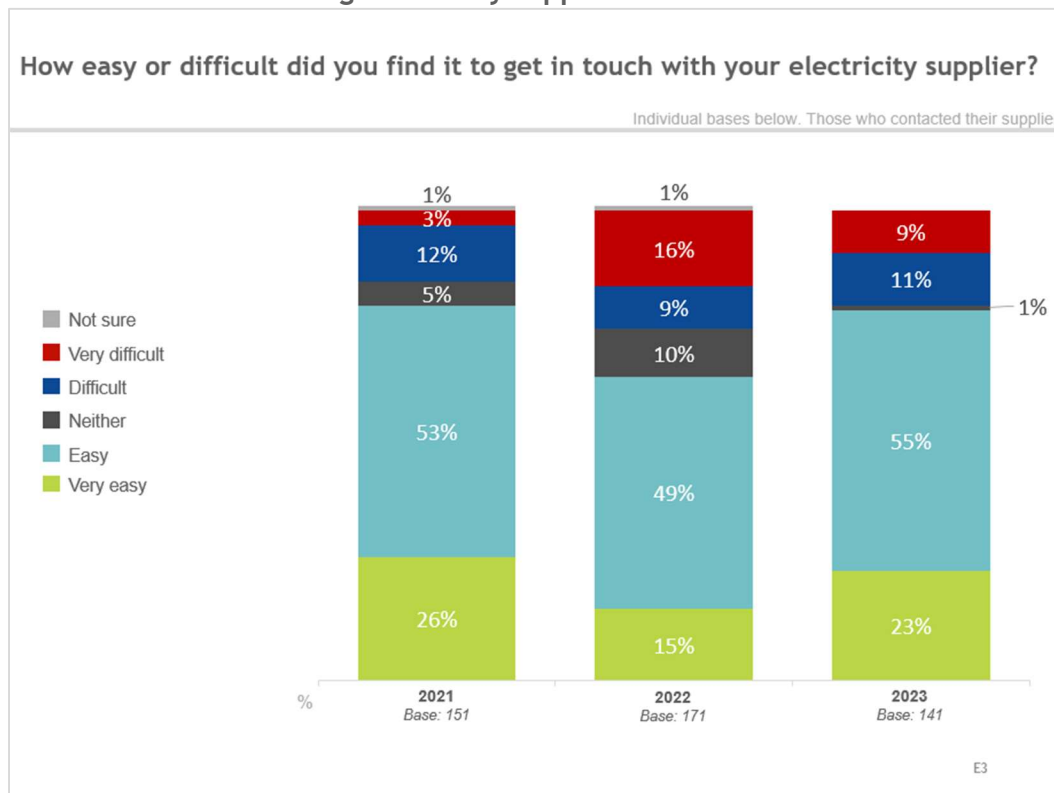
Ease of contacting supplier

Respondents were asked how easy or difficult it was to get in touch with their electricity or gas supplier.

Electricity

Of those respondents who contacted their supplier, over three quarters (78%, $n=110$) found it 'easy' or 'very easy', with 21% ($n=29$) finding it 'difficult' or 'very difficult' (see Figure 6.16).

Figure 6.16 Ease of contacting electricity supplier



Gas

Of the 33 respondents who contacted their gas supplier, 23 thought it was 'easy' or 'very easy' to make contact, while 8 respondents reported it was 'difficult' or 'very difficult'.

Experience of interacting with supplier

Respondents were asked to rate their level of agreement on a number of areas in relation to interactions with their supplier

Electricity

Over four in five (83%) respondents reported that their electricity supplier listened to and understood their issue when they made contact, however, 12% disagreed that this was the case. While four fifths (80%) thought their electricity supplier was supportive, 14% disagreed with this. 81% agreed that they were treated fairly and 13% disagreed.

Figure 6.17 Experience of interacting with electricity supplier - I felt that my electricity supplier listened to me and understood my issue

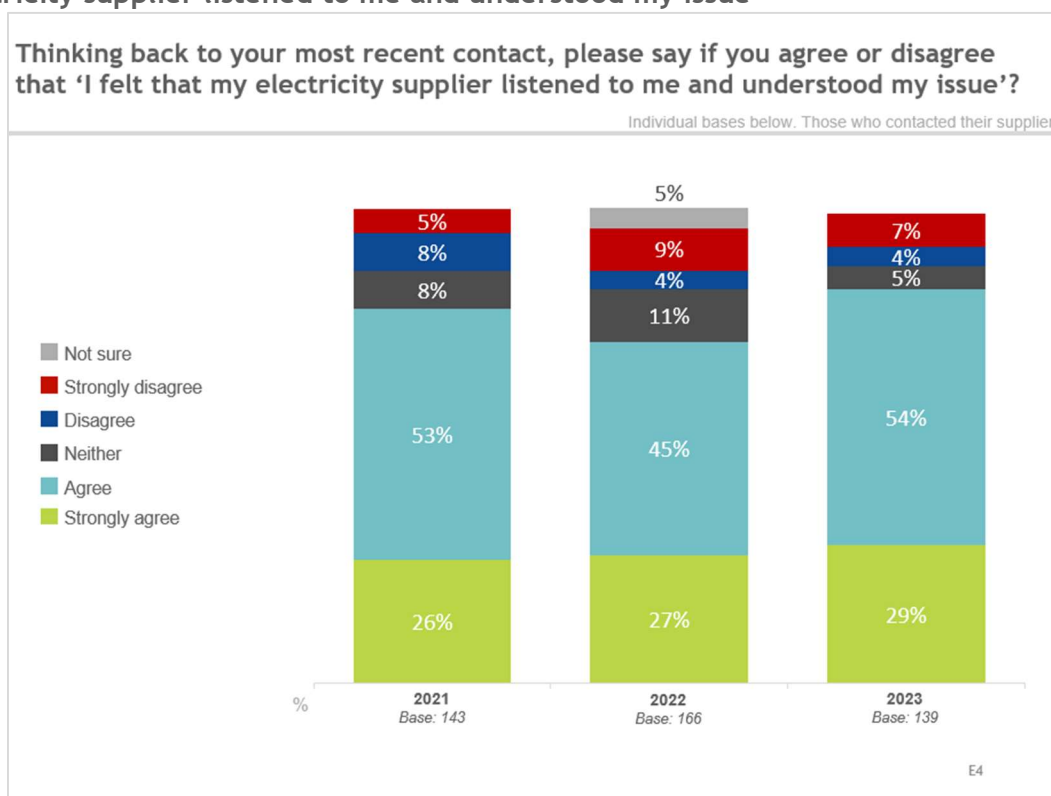


Figure 6.18 Experience of interacting with electricity supplier - my electricity supplier was supportive

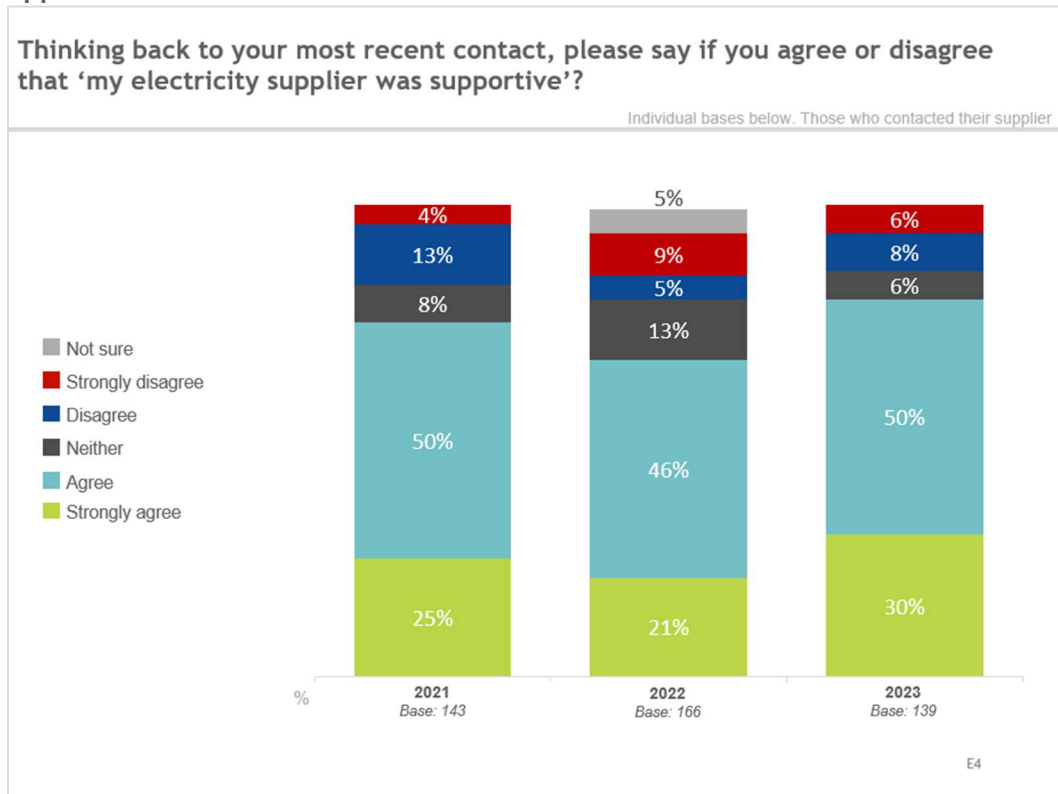
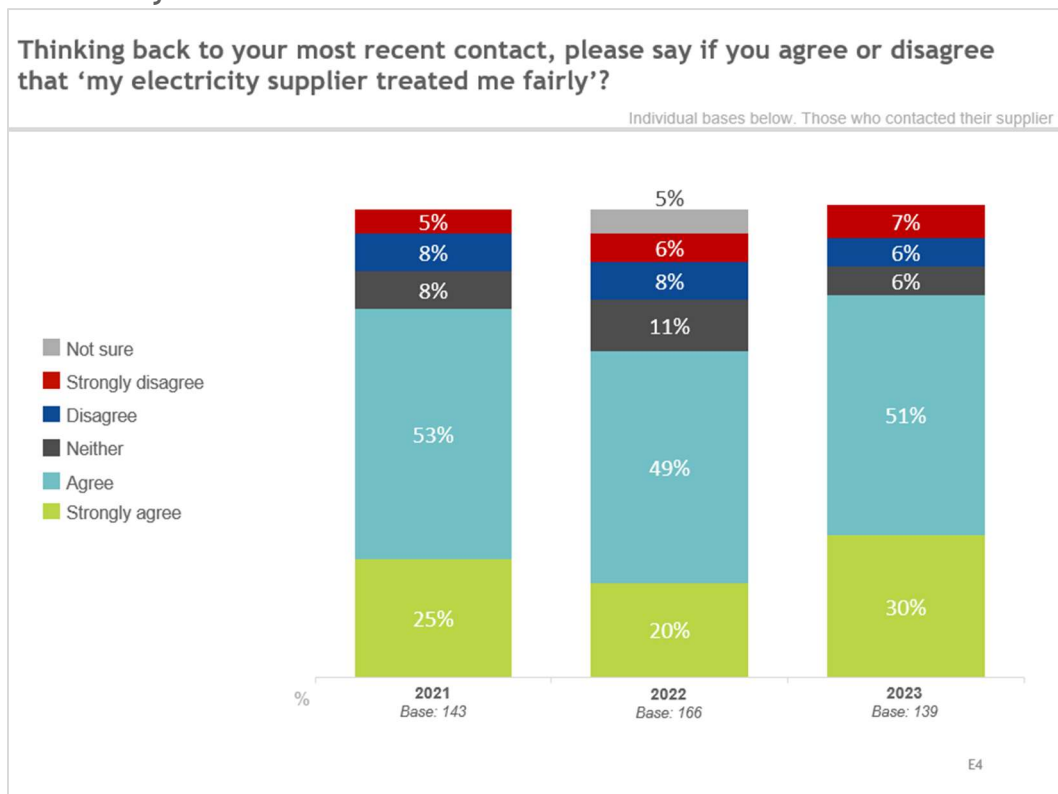


Figure 6.19 Experience of interacting with electricity supplier - my electricity supplier treated me fairly



Gas

20 of the 33 respondents who contacted their gas supplier reported they were listened to and understood when they made contact. 20 agreed that their supplier was supportive, and 20 respondents said they were treated fairly.

Percentages cited in this report were calculated using unrounded figures then rounded to the nearest whole percent. Percentages for categories in the charts therefore may not sum to 100% due to rounding. Percentages cited that combine multiple response categories may not be equal to the sum of the rounded percentages for these categories.

7. Complaint handling

In this section we explore the incidence and experience of making a complaint to an energy supplier. The section is structured under the following headings:

- Incidence of making a complaint;
- Ease of making complaint; and
- Incidence of unreported complaint.

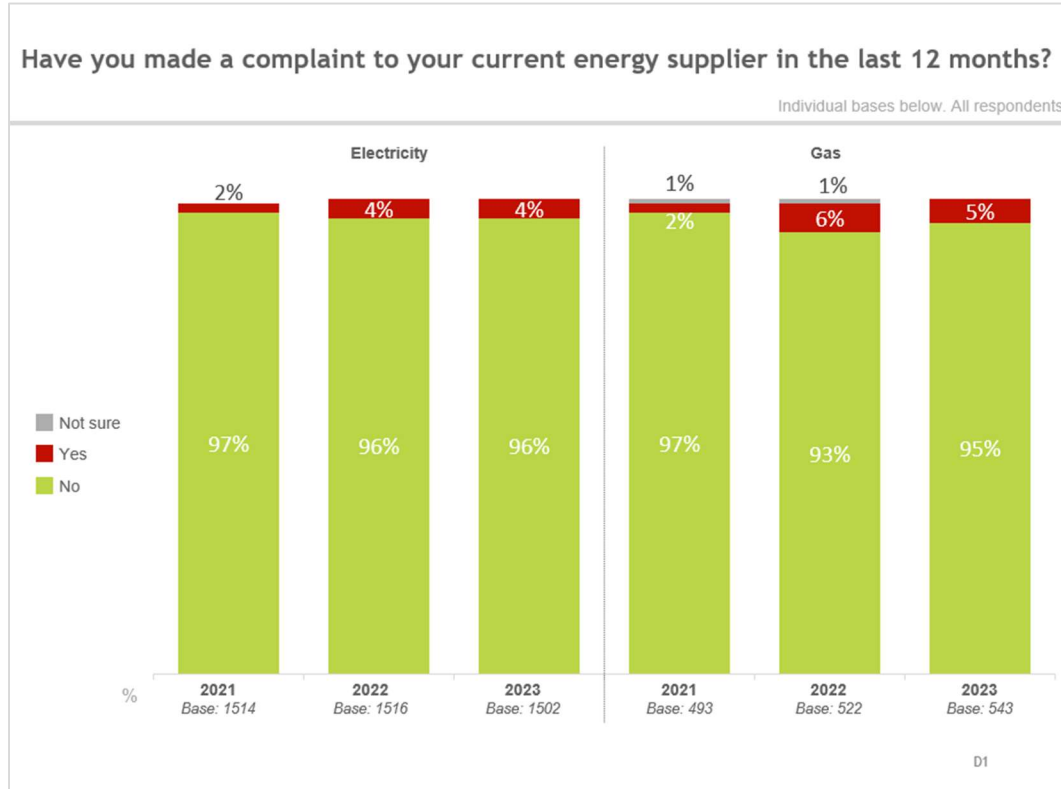
Key findings

- 4% of electricity and 5% of gas respondents had made a complaint to their electricity or gas supplier in the past year.
- 3% stated that they had wanted to make a complaint to their electricity supplier and 3% to their gas supplier in the past but left it unreported.

Incidence of making a complaint

4% of electricity and 5% of gas customers reported that they had made a complaint to their electricity supplier in the last 12 months. There were no significant differences between those who have prepayment meters and those who have credit meters for both electricity and gas customers (see Figure 7.1).

Figure 7.1 Incidence of making a complaint to energy supplier



Respondents who have someone with a disability or illness in their household (7%) were more likely to have made a complaint to their electricity supplier than those who do not have someone with a disability or illness in their household (4%), while those who have children in their household were also more likely to have made a complaint (7%, compared to 3% without children). 6% of electricity switchers had made a complaint to their supplier, compared to 3% who had not switched, and those who have self-disconnected from their electricity supply (10%) were more likely to have made a complaint than those who have not self-disconnected (see Table 7.1).

Table 7.1 Incidence of making a complaint to supplier by disability/illness, children, electricity switching, and electricity self-disconnection

		Yes	No	Not sure	Total
Overall	All Base: 1502	4%	96%	0%	100%
Disability/ illness	Yes Base: 283	7%	93%	-	100%
	No Base: 1168	4%	96%	0%	100%
Children	Yes Base: 459	7%	93%	0%	100%
	No Base: 1040	3%	97%	0%	100%
Electricity switching	Switchers Base: 541	6%	94%	-	100%
	Non-switchers Base: 961	3%	97%	0%	100%
Electricity self- disconnection	Yes Base: 168	10%	90%	-	100%
	No Base: 1325	4%	96%	0%	100%

Ease of making complaint

Those who had complained to either their electricity or gas supplier were asked how easy or difficult it was to make a complaint.

Electricity

Of 65 electricity customers who made a complaint to their supplier, 45 found it easy to make the complaint, while 15 respondents found it difficult.

Gas

14 of the 28 gas customers who made a complaint to their supplier found the complaint process easy, compared to 13 respondents who found it difficult.

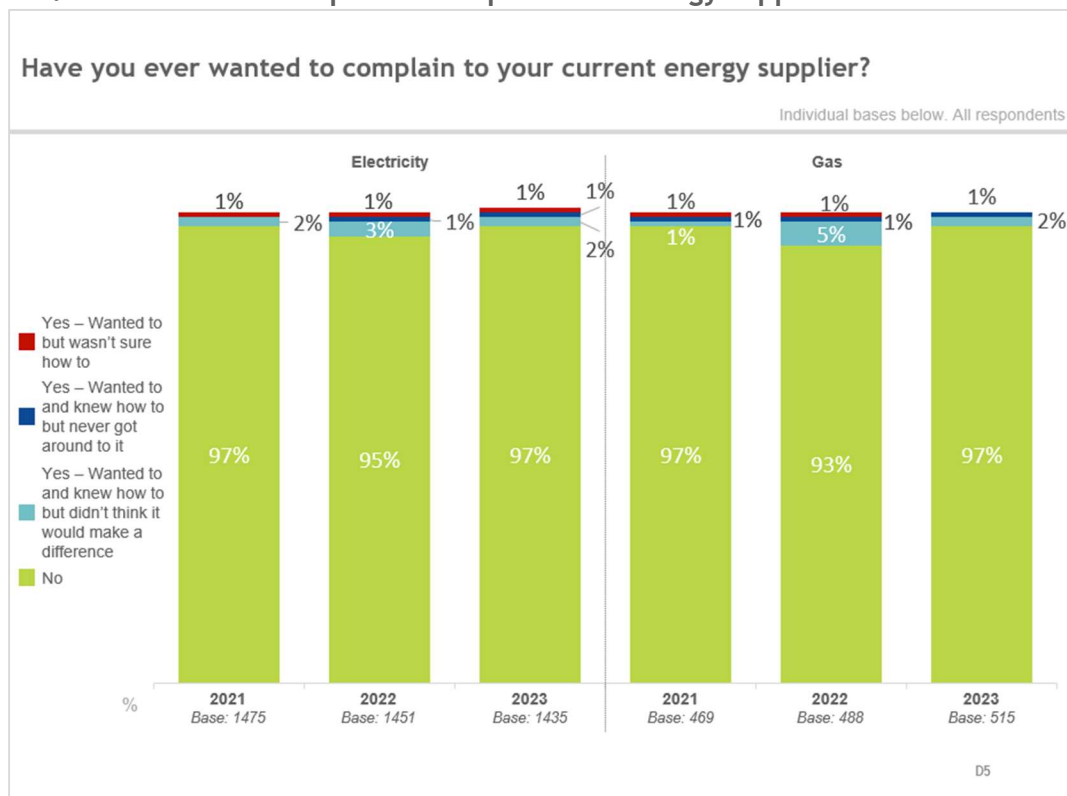
Incidence of unreported complaint

Respondents who had not made a complaint to their energy supplier were asked if they had ever wanted to make a complaint.

Electricity

The vast majority (97%) stated that they have never wanted to make a complaint to their electricity supplier, 2% had wanted to make a complaint but did not think it would make a difference, and a further 1% wanted to make a complaint but were unsure about how to do this. 1% wanted to make a complaint and knew how to, but never got round to doing it. Similarly, the vast majority (97%) of gas consumers confirmed that they have never wanted to make a complaint to their supplier. 2% knew how to make a complaint but did not think it would make a difference, while 1% never got round to making a complaint.

Figure 7.2 Incidence of unreported complaints to energy supplier



Percentages cited in this report were calculated using unrounded figures then rounded to the nearest whole percent. Percentages for categories in the charts therefore may not sum to 100% due to rounding. Percentages cited that combine multiple response categories may not be equal to the sum of the rounded percentages for these categories.

8. Switching

In this section we explore the views of respondents in relation to the following:

- Choosing between suppliers;
- Confidence in current energy deal;
- Comparing energy deals;
- Incidence of switching supplier;
- Reasons for switching;
- Experience of switching;
- Reasons for not switching; and
- Likelihood of switching in the future.

Key findings

- There was a high level of awareness (97%) of being able to choose between different electricity suppliers amongst respondents:
 - 83% of those consumers agreed that having this choice gives access to better deals;
 - over half (53%) had compared electricity deals to see if they could switch supplier or tariff. This is a slight decrease from 54% in the 2022 Tracker; and
 - 32% of those who have the option to switch between gas suppliers said that they had compared gas deals. This is down from 41% in the 2022 study.
- 50% of electricity consumers and 43% of gas customers were confident that they are on the best energy deal for them.
- 51% of domestic consumers have switched their electricity supplier at least once, an increase from 44% in the 2022 Tracker:
 - 71% have done so within the last three years;
 - In contrast, only 12% of those who have the option had switched gas suppliers.
- Feeling they were overpaying (45%) and reacting to an approach by a doorstep seller (28%) were the main drivers for switching electricity supplier. These indicators are consistent with those observed in the 2022 Tracker.
- 38% of electricity consumers who had switched did so through a doorstep seller, down from 48% in 2022.
- 86% of respondents agreed that they received the deal they were expecting when they switched electricity supplier, although 7% disagreed;
 - 83% reported a positive and 3% a negative experience when they switched.
- 63% of respondents had never switched electricity supplier due to satisfaction with their current service, an increase from 50% in 2022.
- 74% had never switched gas supplier for the same reason, which is consistent with the 2022 Tracker.
- 25% of electricity and 18% of gas customers said they were likely to switch their supplier in the next 12 months.
- Internet access and confidence using the internet appears to influence the likelihood of comparing energy deals and of switching:
 - Almost all (98%) of those with internet access were aware they could choose between electricity suppliers;

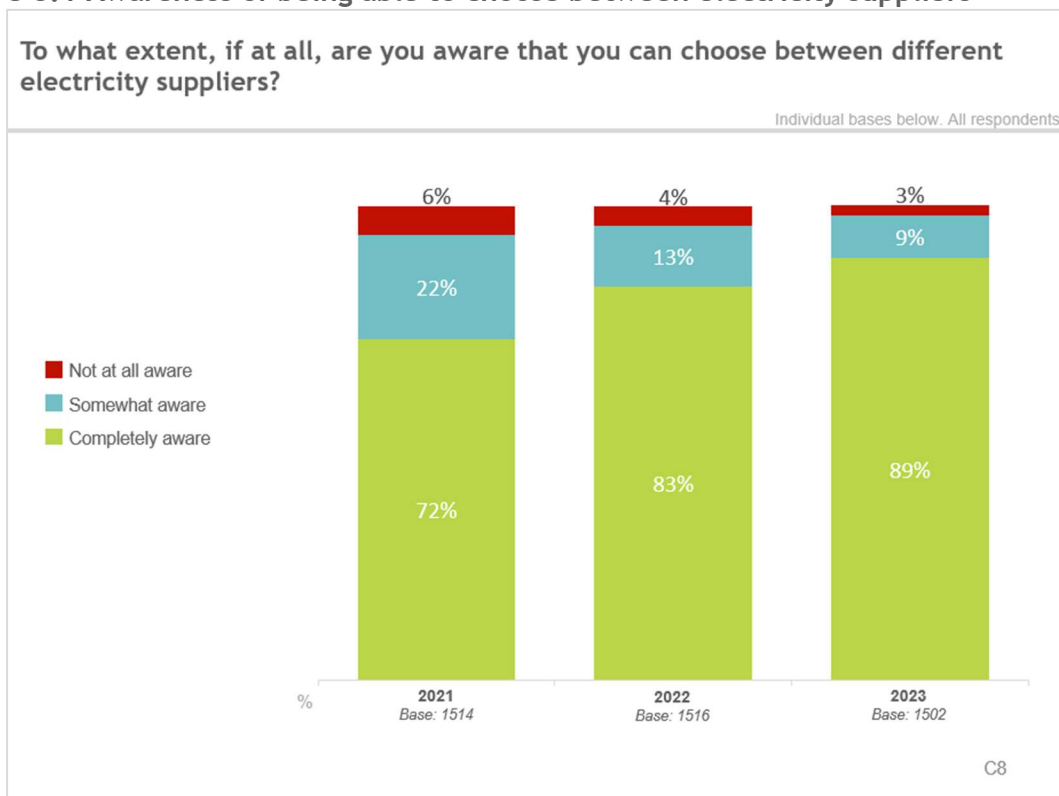
- 58% of those who are confident internet users said they had compared electricity deals compared to 35% who are not confident; and
- Over half (54%) of those who have internet access had switched electricity supplier at least once in contrast to 17% of those without internet access.

Choosing between electricity suppliers

Respondents were asked to what extent they are aware of the option to choose between electricity suppliers, and if they thought this choice would allow them to receive better deals on their energy.⁹

The majority (97%) of domestic consumers were aware that they can choose between different electricity suppliers, including 89% who were completely aware of this (see Figure 8.1).

Figure 8.1 Awareness of being able to choose between electricity suppliers



⁹ These questions were not asked of gas consumers as they only have the choice between one or two suppliers depending on their location.

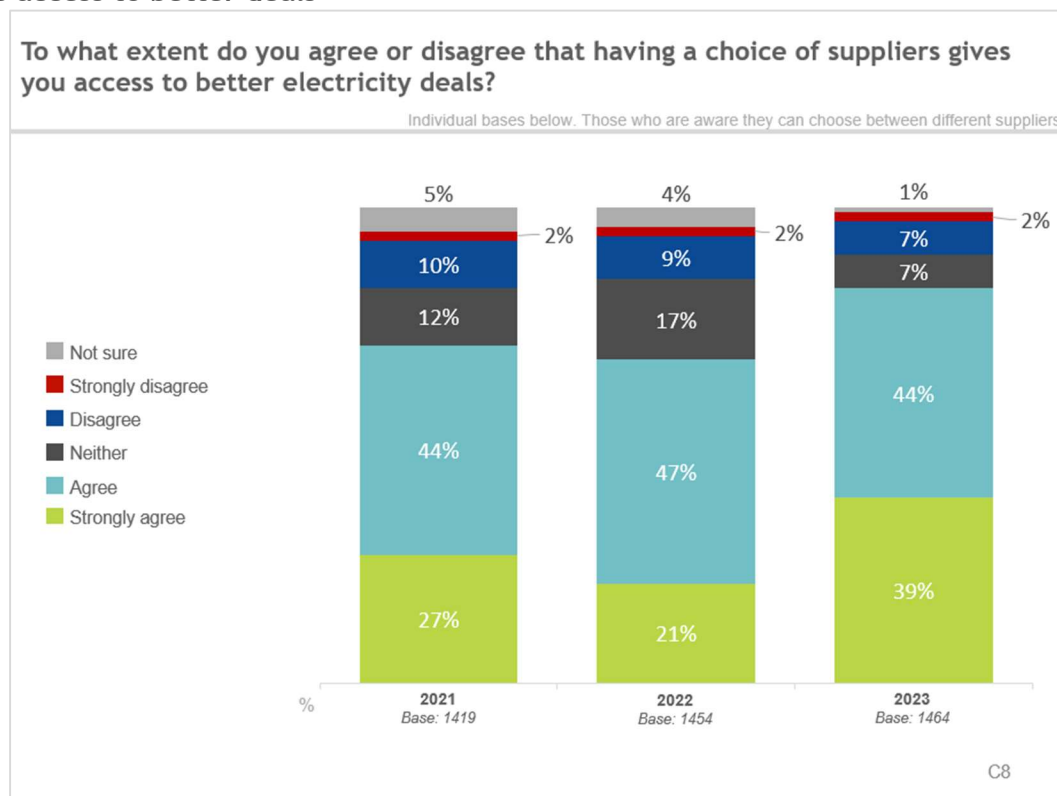
Respondents living in urban areas (99%) were more likely to be aware they can choose between electricity suppliers than rural respondents (96%), while those who have someone with a disability or illness in their household (82%) were not as likely to be completely aware than those who do not have or live with someone who has a disability or illness (91%). 92% of respondents who have children in their household were completely aware, compared to 88% with no children. Those who have access to the internet (98%) and who consider themselves confident internet users (99%) were also more likely than those who do not have internet access (90%) and who are not confident users (93%). Respondents who have a prepayment meter for electricity (91%) were more likely than those with a credit meter (87%) to be completely aware, while electricity switchers (94%) and those who have not self-disconnected from their electricity supply (90%) were more likely to be completely aware than those who have not switched (86%) and who have self-disconnected (84%) (see Table 8.1).

Table 8.1 Awareness of being able to choose between electricity suppliers by demographics, location and internet access

		Completely aware	Somewhat aware	Not at all aware	Total
Overall	All Base: 1502	89%	9%	3%	100%
Location	Urban Base: 905	92%	6%	1%	100%
	Rural Base: 597	84%	12%	4%	100%
Disability/ illness	Yes Base: 283	82%	14%	3%	100%
	No Base: 1168	91%	7%	2%	100%
Children	Yes Base: 459	92%	7%	1%	100%
	No Base: 1040	88%	9%	3%	100%
Internet access	Yes Base: 1401	90%	8%	2%	100%
	No Base: 101	72%	18%	10%	100%
Confidence using internet	Not confident Base: 268	78%	14%	7%	100%
	Neither Base: 221	85%	13%	3%	100%
	Confident Base: 1013	93%	6%	1%	100%
Electricity switching	Switchers Base: 541	94%	6%	1%	100%
	Non-switchers Base: 961	86%	10%	4%	100%
Electricity self-disconnection	Yes Base: 168	84%	13%	4%	100%
	No Base: 1325	90%	8%	2%	100%

83% of those who were aware that they can choose between suppliers agreed having a choice gives them access to better deals, compared to 9% who did not agree (see Figure 8.2).

Figure 8.2 Level of agreement that being able to choose between electricity suppliers gives access to better deals



Subgroup analysis revealed the following significant differences (see Table 8.2):

- Respondents aged 18 to 34 (92%) were more likely to agree that having a choice of supplier gives access to better electricity deals than those in all other age groups (82% aged 35 to 44, 80% aged 45 to 64, and 82% aged 65 plus);
- Those living in urban areas (85%) were more likely to agree than rural respondents (80%);
- Respondents who have or live with someone who has a disability or illness (16%) were more likely to disagree than those who do not have someone with a disability or illness in their household (7%), as were those who would be considered to be in the high or medium vulnerability group (11%) when compared with respondents who are not vulnerable (7%);
- Those who have access to the internet (84%) and those who consider themselves to be confident internet users (86%) were more likely to agree than those who do not have internet access (68%) and those who are not confident internet users (76%);
- 85% of respondents who have an electricity prepayment meter agreed, compared to 81% who have a credit meter;
- Electricity switchers (90%) were more likely to agree that having a choice between electricity suppliers gives access to better deals than those who have not switched supplier in the last three years (79%);
- Respondents who have self-disconnected from their electricity supply (76%) were not as likely to agree compared to those who have not self-disconnected (84%).

Table 8.2 Level of agreement that being able to choose between electricity suppliers gives access to better deals by demographics, location, disability/illness, vulnerability, internet access, confidence using the internet, electricity payment method, electricity switching, and electricity self-disconnection

		Disagree	Neither	Agree	Not sure	Total
Overall	All Base: 1464	9%	7%	83%	1%	100%
Age	Under 35 Base: 210	4%	3%	92%	0%	100%
	35-44 Base: 259	8%	8%	82%	1%	100%
	45-64 Base: 559	11%	7%	80%	1%	100%
	65 plus Base: 408	9%	8%	82%	1%	100%
Location	Urban Base: 893	7%	7%	85%	1%	100%
	Rural Base: 571	12%	7%	80%	2%	100%
Disability/ illness	Yes Base: 274	16%	8%	74%	2%	100%
	No Base: 1141	7%	6%	85%	1%	100%
Vulnerability	High/medium vulnerability Base: 688	11%	7%	80%	2%	100%
	Low vulnerability Base: 61	13%	7%	79%	2%	100%
	Not vulnerable Base: 715	7%	6%	86%	1%	100%
Internet access	Yes Base: 1371	9%	6%	84%	1%	100%
	No Base: 91	13%	13%	68%	5%	100%
Confidence using internet	Not confident Base: 248	13%	9%	76%	2%	100%
	Neither Base: 215	12%	10%	76%	2%	100%
	Confident Base: 1001	7%	6%	86%	1%	100%
Electricity payment method	Prepayment meter Base: 687	8%	6%	85%	1%	100%
	Credit meter Base: 777	10%	7%	81%	2%	100%
Electricity switching	Switchers Base: 537	5%	4%	90%	0%	100%
	Non-switchers Base: 927	11%	8%	79%	2%	100%
Electricity self- disconnection	Yes Base: 162	13%	10%	76%	1%	100%
	No Base: 1293	9%	7%	84%	1%	100%

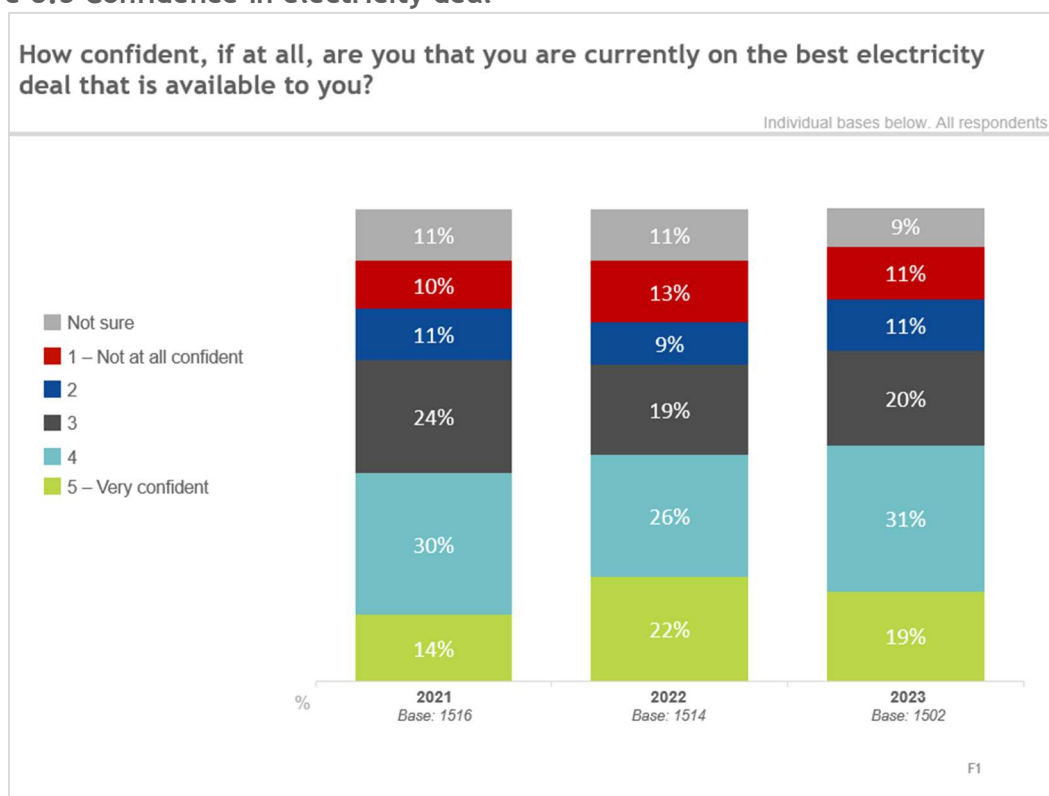
Confidence in current energy deal

Respondents were asked how confident they were that they were on the best deal for electricity or gas that is available to them. Confidence was rated on a 5-point scale, with 1 rated as 'not at all confident' and 5 as 'very confident'.

Electricity

Half (50%) of domestic consumers provided a rating of '4' or '5', including 19% who said they were 'very confident' that they were on the best electricity deal. One in five (20%) gave a rating of '3', while 21% were not confident in their current electricity deal (rating '1' or '2') (see Figure 8.3).

Figure 8.3 Confidence in electricity deal



The following significant subgroup differences were also evident (see Table 8.3):

- Respondents in the C2DE group (11%) were more likely to be unsure if they were on the best electricity deal than those in the ABC1 group (5%);
- Those living in urban areas (53%) were more likely to say they were confident than rural respondents (45%);
- 29% of respondents who have children in their household reported they were not confident they were on the best deal, compared to 18% that do not have children;
- Respondents who would be considered to be in the high or medium vulnerability group (10%) were more likely to be unsure whether they were on the best deal than those who are not vulnerable (7%);
- Those who have access to the internet (22%) were more likely than those without internet access (9%) to say they were not confident, with 19% of those who do not have internet access stating they were unsure about their electricity deal, compared to 8% who have access;

- Respondents who consider themselves confident internet users (7%) were less likely to be unsure than those who are not confident users (15%);
- Although electricity switchers (54%) were more likely than non-switchers (48%) to be confident in their electricity deal, they were also more likely to report not being confident (25%, compared to 19% of non-switchers). Those who had not switched electricity supplier in the last three years were instead more likely to be unsure if they were on the best electricity deal available (11%, compared to 4% of switchers);
- Almost one third (31%) of respondents who had self-disconnected from their electricity supply stated they were not confident about their electricity deal, compared to one fifth (20%) who have not self-disconnected.

Table 8.3 Confidence in electricity deal by demographics, internet access, vulnerability, electricity self-disconnection, electricity payment method and switching

		Not confident (1,2)	Neither (3)	Confident (4,5)	Don't know	Total
Overall	All Base: 1502	21%	20%	50%	9%	100%
SEG	ABC1 Base: 730	23%	22%	50%	5%	100%
	C2DE Base: 727	20%	18%	51%	11%	100%
Location	Urban Base:905	22%	17%	53%	8%	100%
	Rural Base:597	21%	24%	45%	10%	100%
Children	Yes Base: 459	29%	23%	41%	7%	100%
	No Base: 1040	18%	19%	54%	9%	100%
Vulnerability	High/medium vulnerability Base: 706	21%	20%	50%	10%	100%
	Low vulnerability Base: 63	32%	16%	40%	13%	100%
	Not vulnerable Base: 733	21%	21%	51%	7%	100%
Internet access	Yes Base: 1401	22%	20%	50%	8%	100%
	No Base: 101	9%	23%	50%	19%	100%
Confidence using internet	Not confident Base: 268	18%	17%	50%	15%	100%
	Neither Base: 221	24%	23%	45%	9%	100%
	Confident Base: 1013	22%	20%	51%	7%	100%
Electricity switching	Switchers Base: 541	25%	17%	54%	4%	100%
	Non-switchers Base: 961	19%	22%	48%	11%	100%
Electricity self-disconnection	Yes Base: 168	31%	21%	40%	8%	100%
	No Base: 1325	20%	20%	51%	8%	100%

Gas

Respondents with gas heating were slightly less likely to be confident that they were on the best deal compared to electricity consumers. Over two in five (43%) said that they were confident with the deal they were on (rating '4' or '5'), while 27% gave a rating of '1' or '2' (see Figure 8.3).

There were no significant differences in reported confidence between those who had and had not switched gas their gas supplier in the last three years, and between those with a prepayment meter and those with a credit meter.

Figure 8.3 Confidence in gas deal

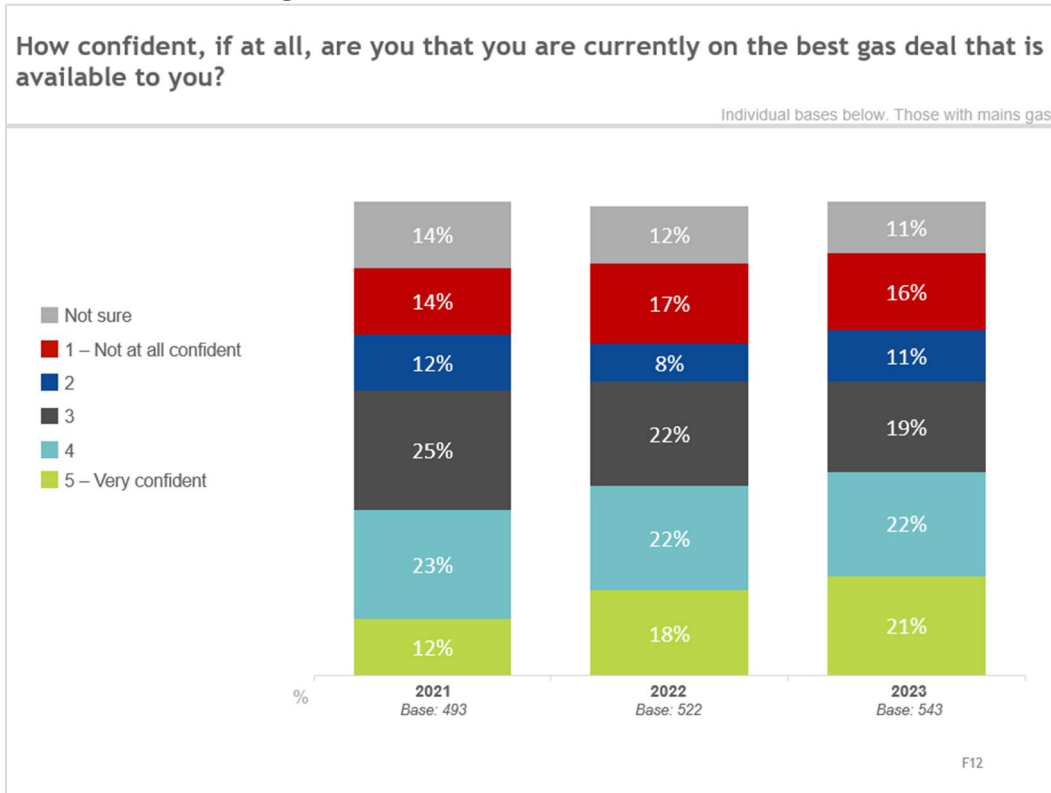


Table 8.4 Confidence in gas deal by payment method and switching behaviour

		Not confident (1,2)	Neither (3)	Confident (4,5)	Not sure	Total
Overall	All Base: 543	27%	19%	43%	11%	100%
Gas payment method	Prepayment meter Base: 374	28%	20%	41%	11%	100%
	Credit meter Base: 169	25%	17%	47%	11%	100%
Gas switching	Switchers Base: 27	37%	19%	44%	-	100%
	Non-switchers Base: 516	26%	19%	43%	12%	100%

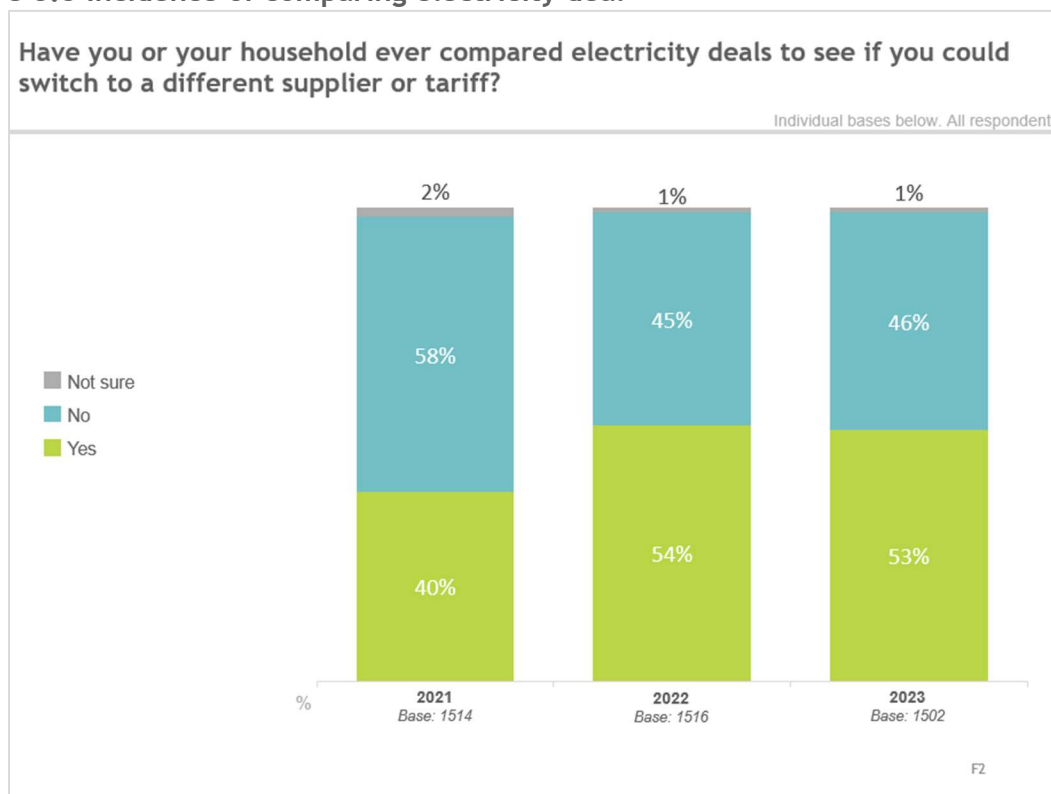
Comparing energy deals

Respondents were asked whether they had ever compared energy deals to see if they could switch supplier or tariff. Those who had were then asked how easy or difficult it was to compare deals.

Electricity

Over half (53%) of domestic consumers had compared their electricity deal. There were no significant differences between those with a prepayment meter and those with a credit meter when it comes to comparing electricity deals (see Figure 8.5).

Figure 8.5 Incidence of comparing electricity deal



Certain subgroups were also significantly more likely to have compared their electricity deal (see Table 8.5):

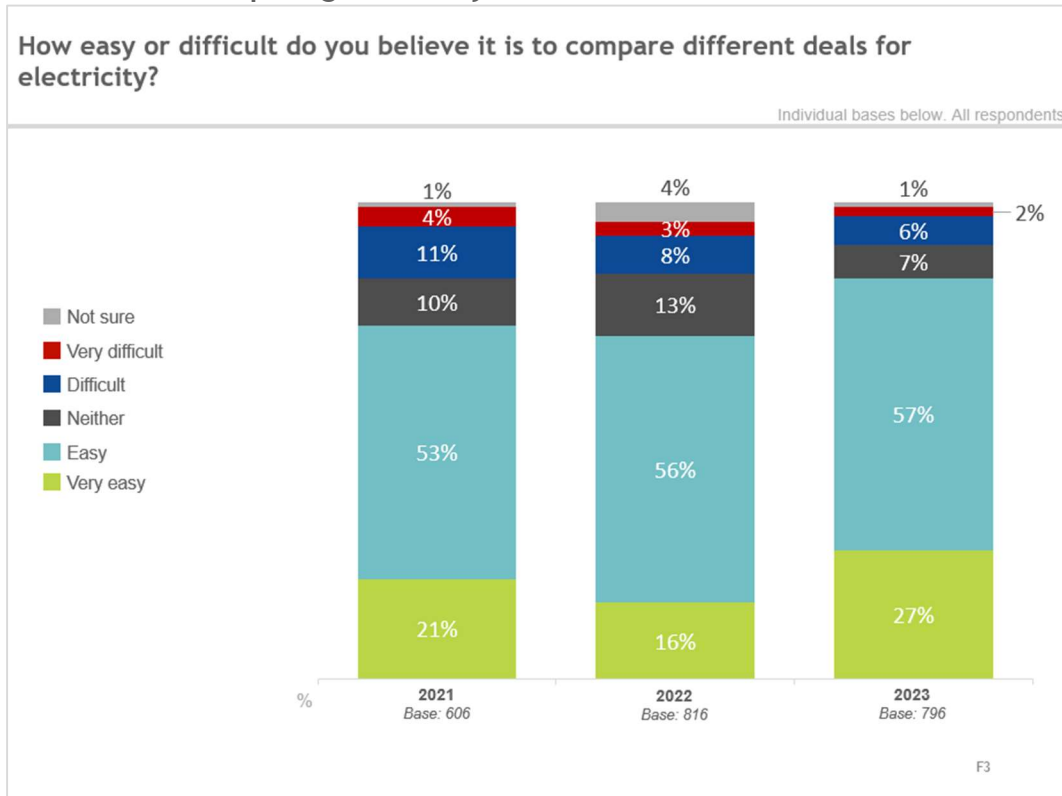
- Respondents living in urban areas (58%) were more likely to have compared their electricity deal than those living in rural areas (45%);
- 54% of those who do not have or live with someone who has a disability or illness had compared their electricity deal, compared to 48% of those who do have someone with a disability or illness in their household;
- Those who have children in their household (60%) were more likely to have compared their deal than those without children (50%);
- Respondents who have access to the internet (55%) and those who consider themselves to be confident internet users (58%) were more likely to report comparing their electricity deal than those without access (22%) and those who do not consider themselves to be confident internet users (35%); and
- Four in five (80%) electricity switchers had compared electricity deals, compared to under two in five (38%) who had not switched in the past three years.

Table 8.5 Incidence of comparing electricity deal by location, disability/illness, children, internet access, confidence using the internet, electricity payment method and electricity switching

		Yes	No	Not sure	Total
Overall	All Base: 1502	53%	46%	1%	100%
Location	Urban Base: 905	58%	41%	1%	100%
	Rural Base: 597	45%	54%	1%	100%
Disability/ illness	Yes Base: 283	48%	52%	1%	100%
	No Base: 1168	54%	45%	1%	100%
Children	Yes Base: 459	60%	39%	1%	100%
	No Base: 1040	50%	49%	1%	100%
Internet access	Yes Base: 1401	55%	44%	1%	100%
	No Base: 101	22%	76%	2%	100%
Confidence using internet	Not confident Base: 268	35%	64%	1%	100%
	Neither Base: 221	50%	48%	2%	100%
	Confident Base: 1013	58%	41%	1%	100%
Electricity payment method	Prepayment meter Base: 700	54%	45%	1%	100%
	Credit meter Base: 802	52%	47%	1%	100%
Electricity switching	Switchers Base: 541	80%	20%	-	100%
	Non-switchers Base: 961	38%	61%	1%	100%

Over four in five (84%) of those who had compared their deal found this 'easy' or 'very easy' to do, compared to 8% who said this was 'difficult' or 'very difficult' for them (see Figure 8.6).

Figure 8.6 Ease of comparing electricity deal



Respondents in the C2DE group (89%) who had compared electricity deals were more likely to find it easy than those in the ABC1 group (78%), while those living in urban areas (87%) were more likely to say it was easy to compare deals than those in rural areas (79%). 87% of those who would be considered to be in the high or medium vulnerability group found it easy to compare electricity deals, compared to four in five (81%) of those who are not vulnerable. Respondents who have a prepayment meter for electricity (88%) were more likely than those with a credit meter (81%) to say they found it easy to compare deals, while those who have switched electricity supplier in the last three years (88%) and who have not self-disconnected from their electricity supply (85%) were more likely to report finding it easy to compare deals than non-switchers (79%) and those who have self-disconnected (74%) (see Table 8.6).

Table 8.6 Ease of comparing electricity deal by demographics, location, vulnerability, electricity payment method, electricity switching, and electricity self-disconnection

		Difficult	Neither	Easy	Not sure	Total
Overall	All Base: 796	8%	7%	84%	1%	100%
SEG	ABC1 Base: 397	12%	8%	78%	2%	100%
	C2DE Base: 382	4%	6%	89%	1%	100%
Location	Urban Base: 529	7%	5%	87%	2%	100%
	Rural Base: 267	10%	9%	79%	1%	100%
Vulnerability	High/medium vulnerability Base: 370	6%	5%	87%	1%	100%
	Low vulnerability Base: 35	6%	6%	89%	-	100%
	Not vulnerable Base: 391	10%	8%	81%	2%	100%
Electricity payment method	Prepayment meter Base: 380	5%	6%	88%	1%	100%
	Credit meter Base: 416	11%	7%	81%	2%	100%
Electricity switching	Switchers Base: 434	6%	5%	88%	1%	100%
	Non-switchers Base: 362	10%	9%	79%	2%	100%
Electricity self-disconnection	Yes Base: 97	13%	12%	74%	-	100%
	No Base: 697	7%	6%	85%	2%	100%

Gas

41% of respondents with gas heating stated that they had the option to switch between gas suppliers in their area, with 39% saying they do not have this option. It should also be noted that one fifth (19%) were unsure whether they could switch their supplier.

Analysis of respondent's postcodes against the postcodes of areas that have the choice between suppliers showed that there are discrepancies between whether customers think they have the choice between suppliers and whether they actually do. 62% of respondents with gas were identified as living in an area which would allow them a choice of supplier. Over one quarter (29%) of those who did not think they had a choice of supplier actually did have a choice, while 27% of those who thought they could choose between gas suppliers are unable to.

Figure 8.7 Ability to switch gas supplier

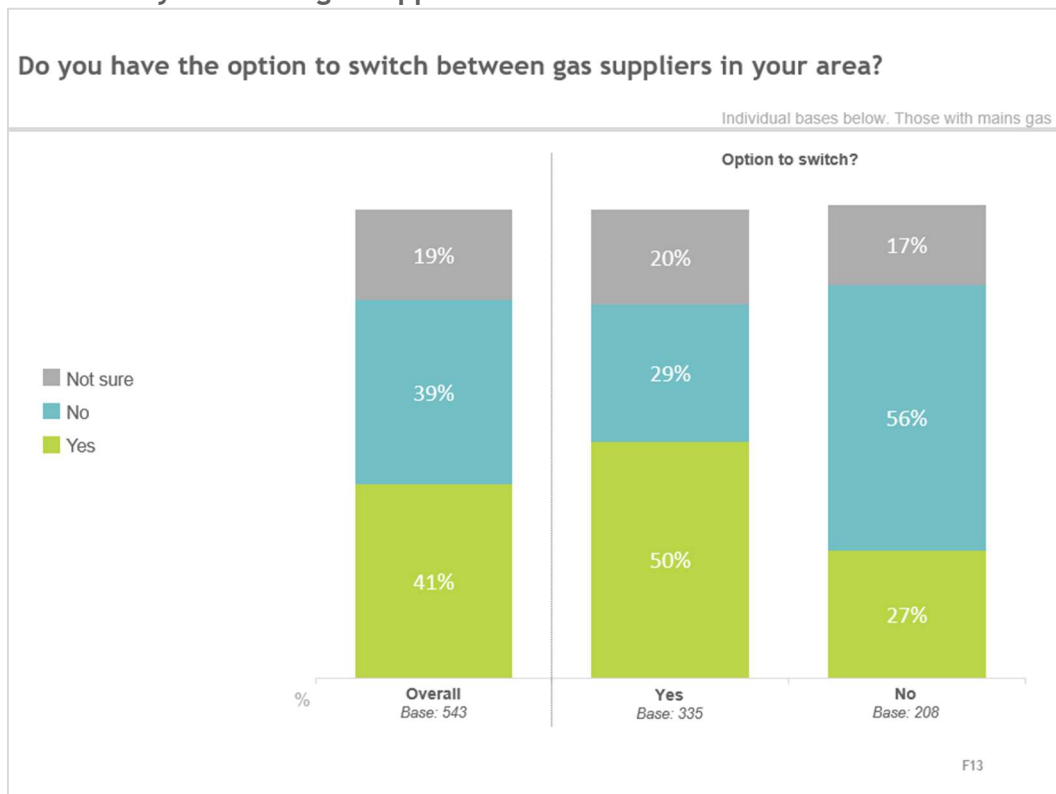
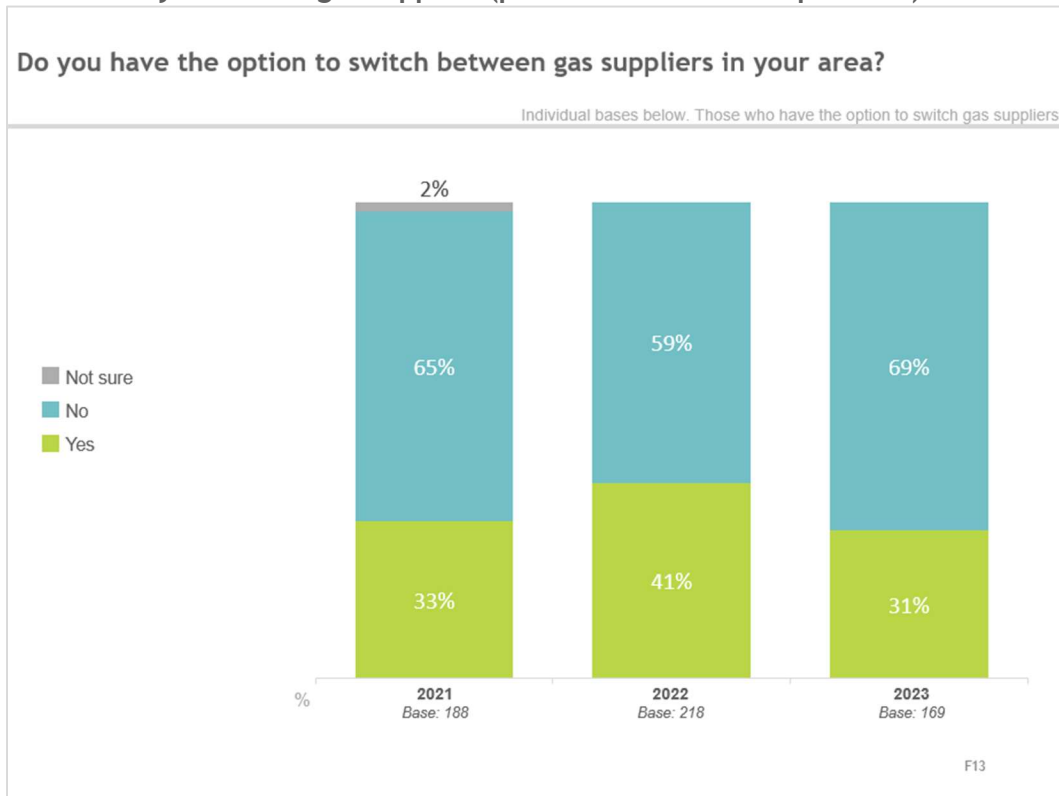


Figure 8.8 Ability to switch gas supplier (previous Tracker comparisons)



One third (32%) of those who believe they have the option to switch gas supplier reported that they have compared their current gas deal to see if they could switch. This compares to 41% of respondents in 2022 who said they had done this (see Figure 8.8).

Gas customers who had switched their supplier in the last three years ($n=24$) were more likely than non-switchers ($n=201$) to have compared deals (83% versus 26%) (see Table 8.7).

Figure 8.9 Incidence of comparing gas deal

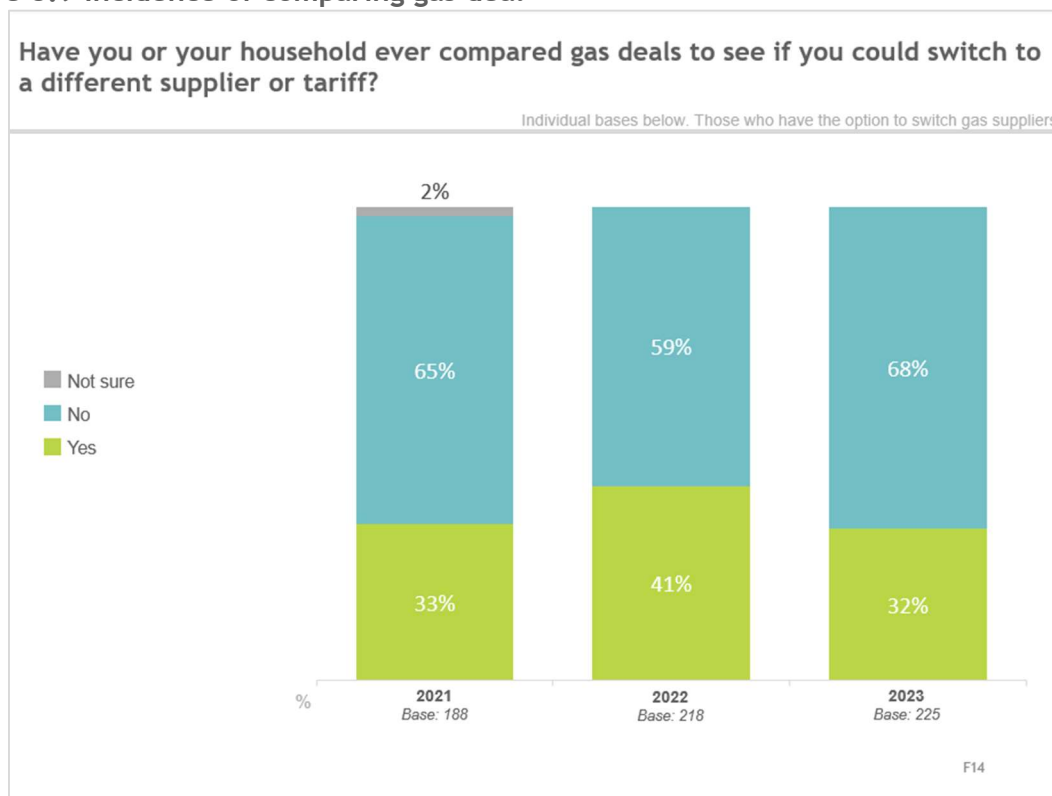


Table 8.7 Incidence of comparing gas deal by switching

		Yes	No	Total
Overall	All Base: 225	32%	68%	100%
Gas switching	Switchers Base: 24	83%	17%	100%
	Non-switchers Base: 201	26%	74%	100%

Of those who had compared their gas deal ($n=72$), the majority (93%, $n=67$) said that this was easy to do, whereas 3% ($n=2$) found it difficult.

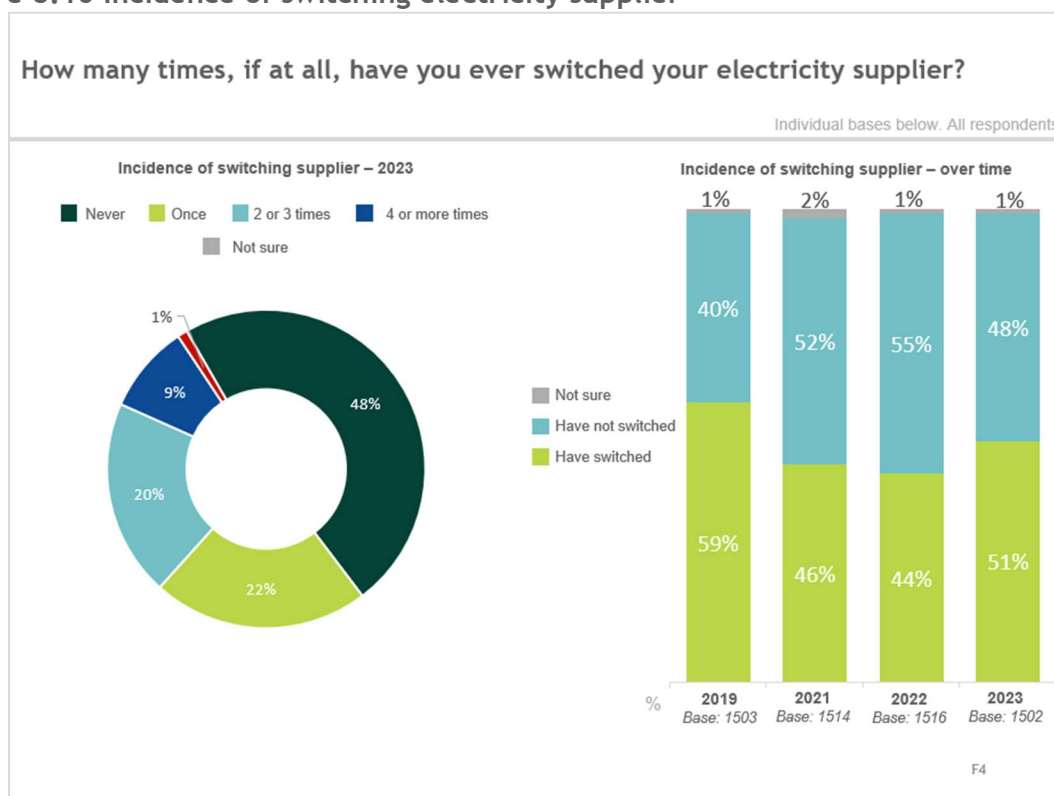
Incidence of switching supplier

Respondents were asked to outline how many times, if at all, they had switched energy supplier.

Electricity

Almost half (48%) of electricity customers reported that they have never switched their supplier. 22% said that they had switched once, and a further 20% had switched two or three times. 9% of respondents had switched at least four times (see Figure 8.10).

Figure 8.10 Incidence of switching electricity supplier



Incidence of switching was higher in several subgroups (see Table 8.8):

- While the difference was not statistically significant, those aged 65 and over (54%) were more likely to have never switched electricity supplier than those aged 35 to 44 (44%) and 45 to 64 (45%);
- 56% of respondents living in rural areas reported never switching their electricity supplier, significantly higher compared to 43% of those in urban areas;
- Those who privately rent their home (60%) were not as likely to have switched supplier compared to those who own their home (48%) and who live in social housing (41%);
- Respondents who have children (41%) were less likely to have never switched electricity supplier than those who do not have children in their household (51%);
- Of particular note, four in five (82%) of those who do not have internet access said they have never switched electricity suppliers, compared to 45% of those who do have internet access. Respondents who do not consider themselves as confident internet users (62%) were also more likely to have never switched than those who are confident users (44%);

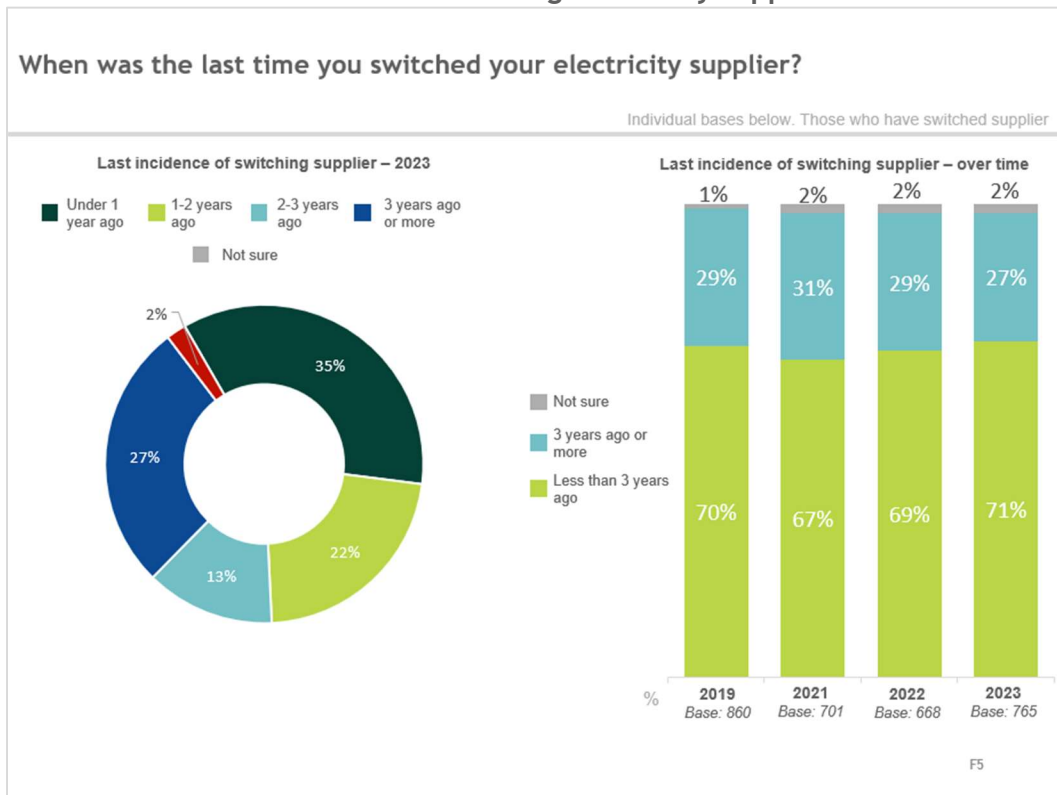
- Respondents who have a prepayment meter for electricity (22%) were more likely to say they had switched two or three times compared to those who have a credit meter (18%); and
- One quarter (26%) of respondents who have self-disconnected from their electricity supply stated they had switched two or three times, compared to 19% of those who have not self-disconnected.

Table 8.8 Incidence of switching electricity supplier by demographics, location, tenure, children, internet access, confidence using the internet, electricity payment method, and electricity self-disconnection

		Never	Once	2 or 3 times	4 or more times	Don't know	Total
Overall	All Base: 1502	48%	22%	20%	9%	1%	100%
Age	Under 35 Base: 215	51%	25%	18%	5%	1%	100%
	35-44 Base: 263	44%	22%	20%	13%	2%	100%
	45-64 Base: 572	45%	22%	23%	9%	1%	100%
	65 plus Base: 422	54%	22%	17%	7%	0%	100%
Location	Urban Base: 905	43%	24%	21%	11%	1%	100%
	Rural Base: 597	56%	20%	17%	6%	1%	100%
Tenure	Own home Base: 1078	48%	22%	19%	10%	1%	100%
	Private renting Base: 163	60%	21%	14%	4%	1%	100%
	Social housing Base: 231	41%	23%	27%	8%	2%	100%
Children	Yes Base: 459	41%	25%	23%	9%	2%	100%
	No Base: 1040	51%	21%	18%	8%	1%	100%
Internet access	Yes Base: 1401	45%	23%	21%	9%	1%	100%
	No Base: 101	82%	12%	4%	1%	1%	100%
Confidence using internet	Not confident Base: 258	62%	20%	12%	4%	1%	100%
	Neither Base: 221	49%	23%	22%	5%	1%	100%
	Confident Base: 1013	44%	23%	21%	11%	1%	100%
Electricity payment method	Prepayment meter Base: 700	48%	19%	22%	10%	1%	100%
	Credit meter Base: 802	48%	25%	18%	8%	1%	100%
Electricity self-disconnection	Yes Base: 168	41%	21%	26%	11%	1%	100%
	No Base: 1325	49%	23%	19%	8%	1%	100%

Respondents who had switched electricity supplier were then asked when was the last time they switched. Just less than three quarters (71%) had done so within the last three years, including 35% who had switched in the last year. A further 27% had switched at least three years ago.

Figure 8.11 Most recent instance of switching electricity supplier



Of those who had ever switched, the following subgroups were significantly more likely to be current 'switchers' (i.e. switched electricity supplier in the last three years) (see Table 8.9):

- Respondents aged 18 to 34 (87%) were more likely to have switched electricity supplier in the last three years than those aged 35 to 44 (67%), 45 to 64 (72%), and 65 plus (63%);
- Three quarters (75%) of those living in urban areas would be considered switchers, compared to three in five (62%) living in rural areas;
- Those living in social housing (80%) were more likely to have switched supplier in the last three years than those who own their home (69%); and
- Respondents who have a prepayment meter for electricity (76%) were more likely to be switchers than those who have a credit meter (66%).

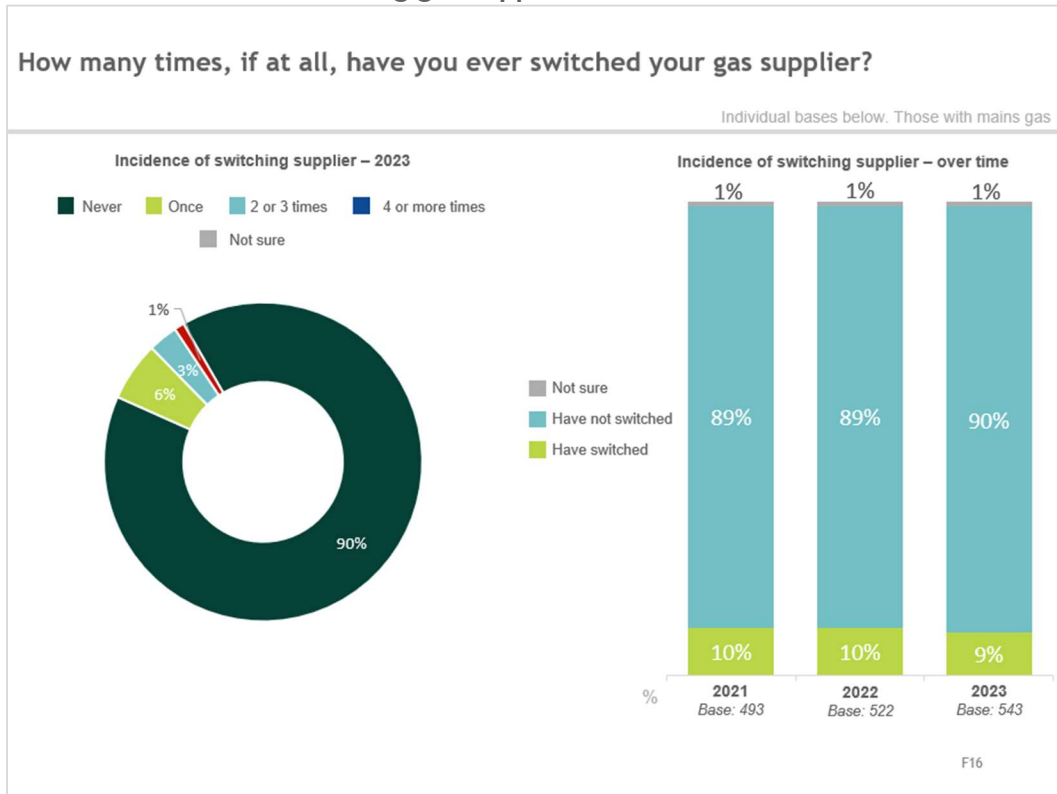
Table 8.9 Most recent instance of switching electricity supplier by demographics, location, tenure, and electricity payment method

		Under 1 year ago	1-2 years ago	2-3 years ago	3 years ago or more	Not sure	Total
Overall	All Base: 765	35%	22%	13%	27%	2%	100%
Age	Under 35 Base: 102	50%	19%	19%	13%	-	100%
	35-44 Base: 142	29%	26%	12%	31%	2%	100%
	45-64 Base: 312	36%	24%	12%	26%	2%	100%
	65 plus Base: 194	31%	19%	13%	35%	2%	100%
Location	Urban Base: 506	39%	23%	13%	23%	2%	100%
	Rural Base: 259	27%	21%	14%	36%	2%	100%
Tenure	Own home Base: 556	33%	22%	14%	30%	2%	100%
	Private renting Base: 64	34%	30%	9%	25%	2%	100%
	Social housing Base: 133	44%	23%	13%	18%	2%	100%
Electricity payment method	Prepayment meter Base: 357	40%	24%	12%	22%	2%	100%
	Credit meter Base: 408	31%	21%	14%	32%	2%	100%

Gas

The majority (90%) of gas customers with the option to switch have never switched their supplier, while 9% have switched at least once.

Figure 8.12 Incidence of switching gas supplier



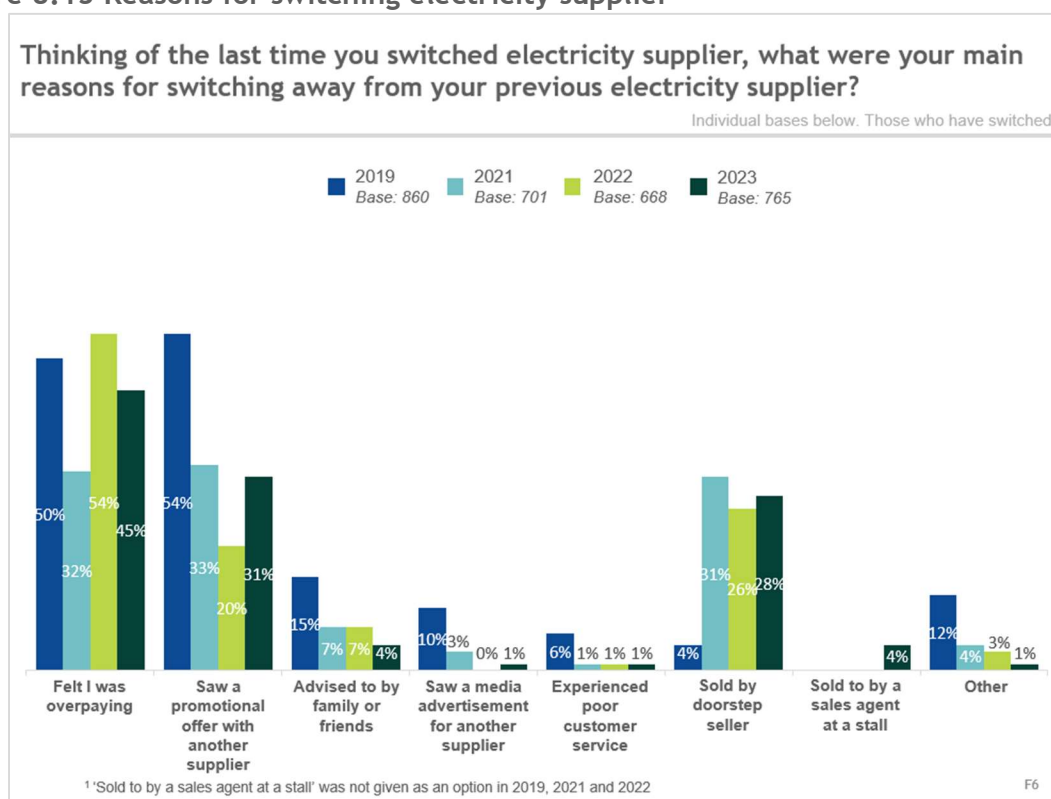
Of the 46 respondents who had switched their gas supplier, 27 had switched within the last three years, while 18 had switched at least three years ago.

Reasons for switching

Electricity

There were three main drivers for switching electricity supplier: i) reacting to feeling the respondent was paying too much; ii) reacting to a promotional offer from another supplier; and iii) reacting to an offer from a doorstep seller (see Figure 8.13). Almost half (45%) felt that they were overpaying on their previous deal (down from 54% in 2022), while one third (31%) had seen an offer from another supplier (up from 20% in 2022). Over one quarter (28%) received an offer from a doorstep seller, up slightly from 26% in 2022.

Figure 8.13 Reasons for switching electricity supplier



Gas

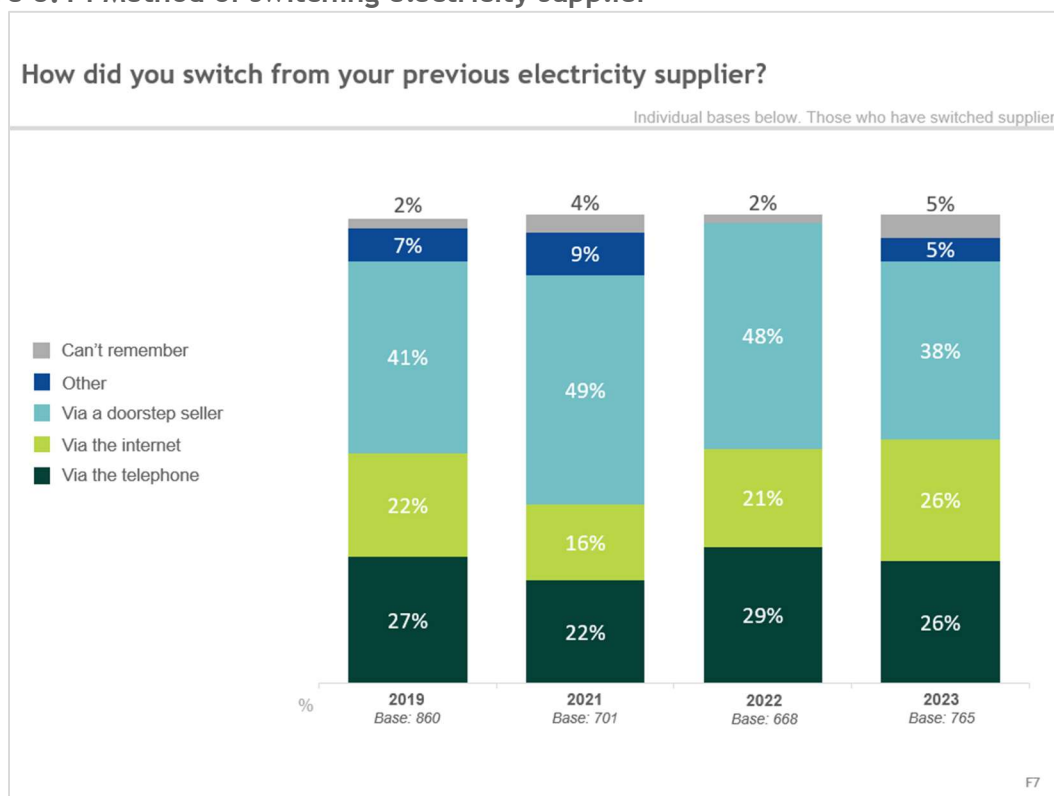
Gas customers have similar drivers for switching: i) reacting to feeling they were overpaying; ii) reacting to a promotional offer from another supplier; and iii) reacting to a deal offered by a doorstep seller. 25 of the 46 respondents who had switched gas supplier said they felt they were overpaying on their previous deal, and a further 14 respondents said it was because they saw a promotional offer from another supplier. Less than 5 respondents reported they had been sold their deal by a doorstep seller.

Experience of switching

Electricity

The most common method used to switch electricity supplier was through a doorstep seller, with two in five (38%) saying this. Telephone (26%) and using the internet (26%) were the next most popular methods. 5% switched using other methods, including 4% who switched at a stall in a shopping centre or at an event.

Figure 8.14 Method of switching electricity supplier



There were significant differences in the method of switching amongst a number of subgroups (Table 8.10):

- One third (34%) of respondents aged 18 to 34 switched electricity supplier via the internet, compared to 17% aged 65 and over, with those in the older age group more likely than all other respondents to report switching after being approached by a doorstep seller (47%, compared to 32% aged 18 to 34, 35% aged 35 to 44, and 35% aged 45 to 64);
- While respondents in the ABC1 group (30%, compared to 21% in the C2DE group) were more likely to say they switched over the internet, those in the C2DE group (43%, compared to 32% in the ABC1 group) were more likely to have switched through a doorstep seller;
- Respondents living in urban areas (45%) were more likely to have been approached by a doorstep seller than those in rural areas (24%), who were instead more likely to have switched via the telephone (34%, compared to 23% in urban areas);
- Those living in the most deprived areas (55%) were more likely to have switched via a doorstep seller than all other respondents;
- Half (50%) of respondents living in social housing said they were approached by a doorstep seller, compared to one third of both those who own their home (35%) and who privately rent (33%);

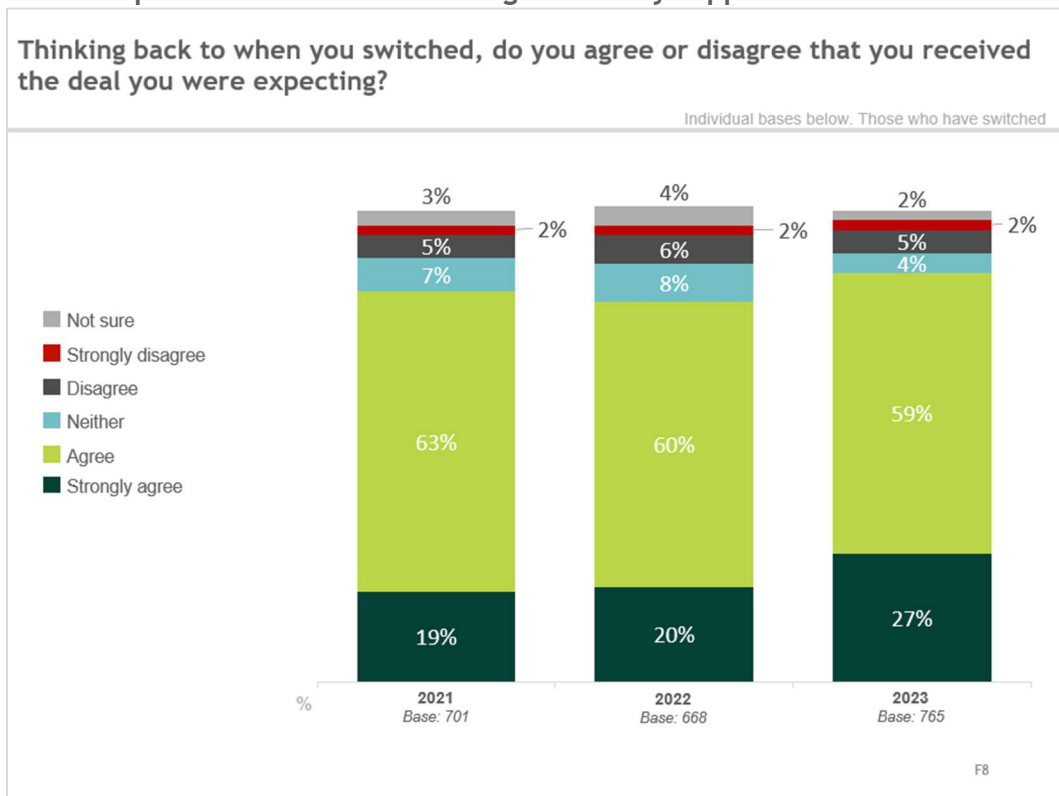
- Respondents who have someone with a disability or illness in their household (46%) were more likely to have switched supplier after being approached by a doorstep seller than those who do not have or live with someone who has a disability or illness (35%);
- Those who have children living in their household (33%) were less likely to have switched via a doorstep seller than those who do not have children (40%);
- Two in five (42%) respondents in the high or medium vulnerability group said they switched supplier through a doorstep seller, in comparison with one third (34%) who are not vulnerable;
- Respondents who consider themselves to be confident internet users (34%) were not as likely to have switched via a doorstep seller compared to those who are not confident internet users (49%); and
- Those who have a prepayment meter for electricity (43%) were more likely to have switched their supplier after being approached by a doorstep seller when compared with those who have a credit meter (33%).

Table 8.10 Method of switching electricity supplier by demographics, location, deprivation, tenure, disability/illness, children, vulnerability, confidence using the internet, and electricity payment method

		Via the telephone	Via the internet	Via a doorstep seller	Shopping centre, stall at an event etc	Other	Can't remember	Total
Overall	All Base: 765	26%	26%	38%	4%	1%	5%	100%
Age	Under 35 Base: 102	28%	34%	32%	3%	-	2%	100%
	35-44 Base: 142	28%	26%	35%	6%	2%	3%	100%
	45-64 Base: 312	25%	28%	35%	5%	0%	7%	100%
	65 plus Base: 194	26%	17%	47%	3%	1%	7%	100%
SEG	ABC1 Base: 371	29%	30%	32%	4%	1%	6%	100%
	C2DE Base: 373	24%	21%	43%	5%	1%	5%	100%
Location	Urban Base: 506	23%	24%	45%	3%	1%	5%	100%
	Rural Base: 259	34%	28%	24%	7%	0%	7%	100%
MDM Quintile	1 - Most deprived Base: 155	23%	15%	55%	3%	1%	2%	100%
	2 Base: 158	30%	25%	35%	3%	1%	6%	100%
	3 Base: 147	29%	28%	26%	7%	-	11%	100%
	4 Base: 132	26%	37%	29%	5%	-	3%	100%
	5 - Least deprived Base: 173	25%	25%	40%	3%	2%	5%	100%
Tenure	Own home Base: 556	26%	28%	35%	4%	1%	5%	100%
	Private renting Base: 64	39%	16%	33%	3%	2%	8%	100%
	Social housing Base: 133	22%	20%	50%	5%	-	3%	100%
Disability/illness	Yes Base: 143	28%	15%	46%	4%	2%	5%	100%
	No Base: 598	26%	28%	35%	4%	1%	5%	100%
Children	Yes Base: 264	27%	27%	33%	6%	2%	5%	100%
	No Base: 500	26%	25%	40%	3%	0%	5%	100%
Vulnerability	High/medium vulnerability Base: 352	28%	20%	42%	5%	1%	3%	100%
	Low vulnerability Base: 29	34%	21%	28%	7%	-	10%	
	Not vulnerable Base: 384	25%	31%	34%	3%	1%	7%	100%
Confidence using the internet	Not confident Base: 98	33%	10%	49%	1%	1%	6%	100%
	Neither Base: 110	24%	19%	45%	5%	1%	6%	100%
	Confident Base: 557	26%	30%	34%	5%	1%	5%	100%
Electricity payment method	Prepayment meter Base: 357	25%	23%	43%	4%	1%	4%	100%
	Credit meter Base: 408	27%	28%	33%	5%	1%	6%	100%

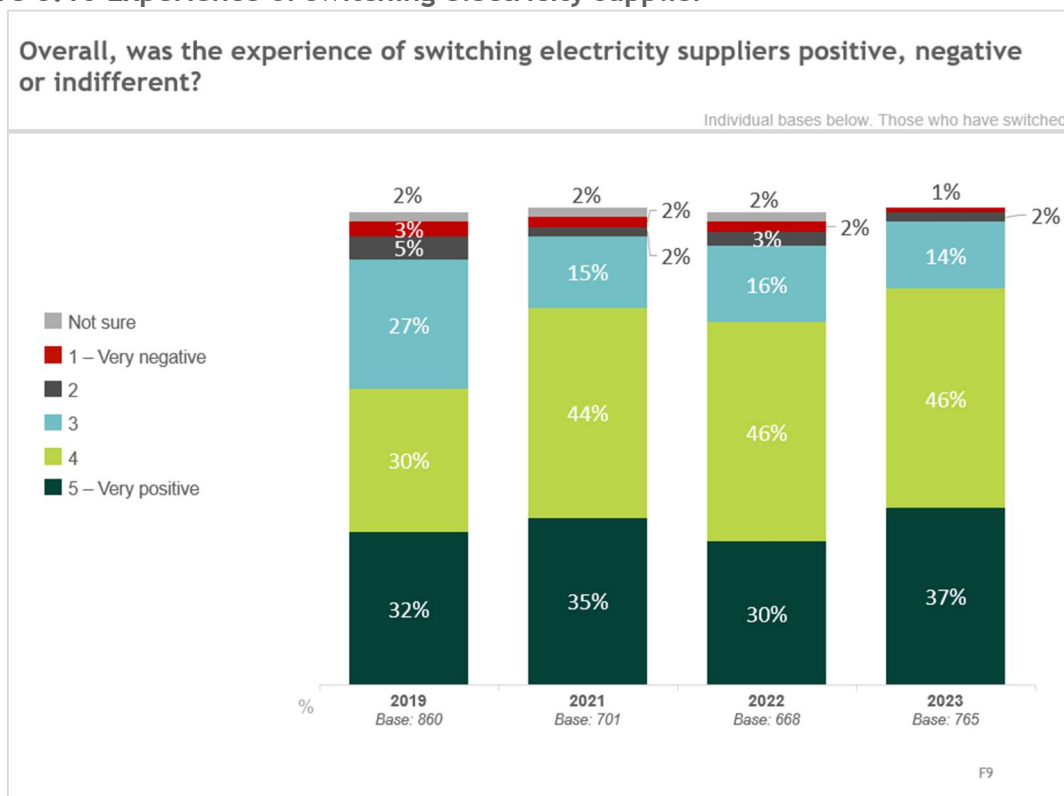
87% of respondents agreed that they received the deal they expected when they switched electricity supplier, compared to 8% who disagreed (see Figure 8.15).

Figure 8.15 Expected deal when switching electricity supplier



83% had a positive experience (rating '4' or '5') when they switched supplier, with 3% reporting a negative experience (rating '1' or '2') (see Figure 8.16).

Figure 8.16 Experience of switching electricity supplier



Gas

17 of the 46 respondents who had switched their gas supplier did so via the telephone. 14 respondents switched after being approached by a doorstep seller, and 9 respondents switched via the internet.

Almost all (41 respondents out of 46) who switched gas supplier agreed that they received the deal that they had expected.

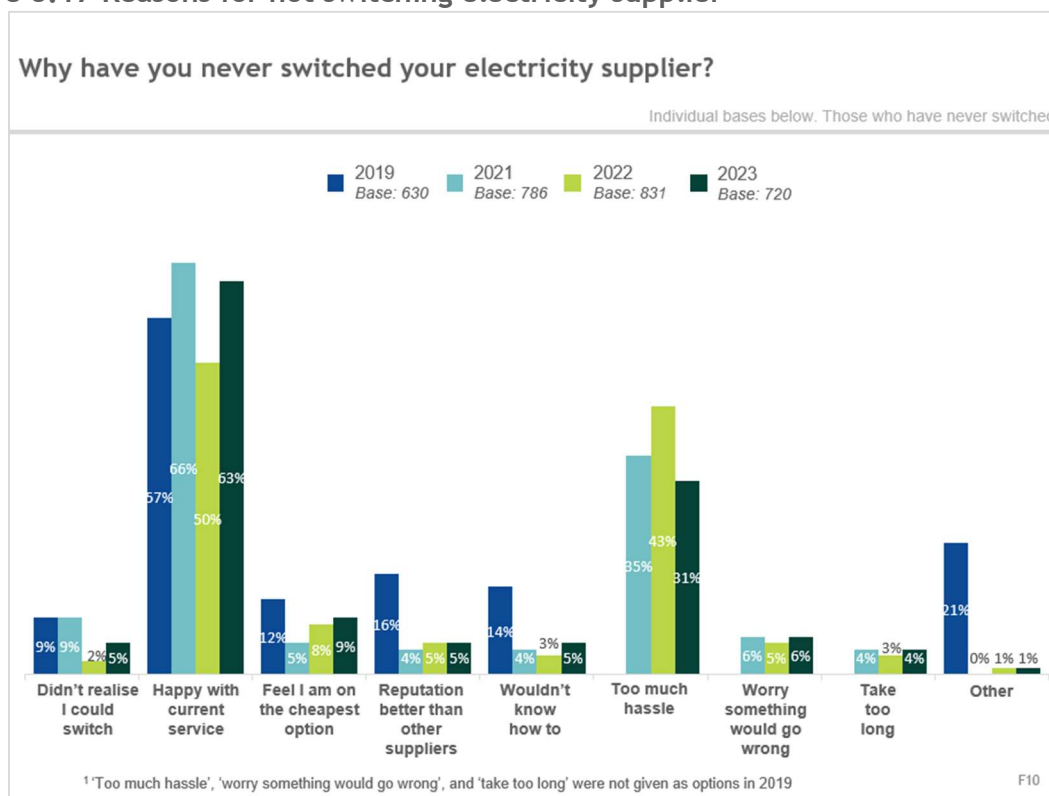
40 respondents had a positive (rating '4' or '5') experience of switching.

Reasons for not switching

Electricity

When asked why they had never switched electricity supplier, almost two thirds (63%) said it was because they were happy with their current service (an increase from 50% in 2022), while a further 31% thought it would be too much hassle to switch (decreasing from 43% in 2022). 5% of respondents were unaware that they could switch their electricity supplier (see Figure 8.17).

Figure 8.17 Reasons for not switching electricity supplier



There were significant differences in the reasons for not switching between the subgroups (see Table 8.11):

- Respondents aged 18 to 34 (8%) were more likely to say they were unaware they could switch than those aged 65 and over (3%);
- Those in the C2DE group (68%) were more likely to report they were happy with their current service than those in the ABC1 group (60%);
- 7% of those living in rural areas did not realise they could switch supplier, compared to 3% in urban areas;
- Respondents living in the most deprived areas (17%) were more likely to say they felt they were on the cheapest option than those in the least deprived areas (4%);
- Those living in social housing (15%) were more likely than those who own their home (8%) to report feeling they are on the cheapest option as the reason for not switching their electricity supplier;
- 17% of respondents who have or live with someone who has a disability or illness gave feeling they were on the cheapest option as a reason for not switching, compared to 7% of those who have no one with disability or illness in their household;
- Respondents with no children in their household (66%) were more likely to say they were happy with the current service than those who do have children (56%);
- Those who do not consider themselves to be confident internet users (37%) were more likely to suggest it would be too much hassle to switch than confident internet users (26%); and
- Respondents who have a prepayment meter for electricity (13%) were more likely to say they felt they were on the cheapest option already than those with a credit meter (6%), who were instead more likely to suggest the reputation of their supplier was better than others (6%, compared to 3% with a prepayment meter).

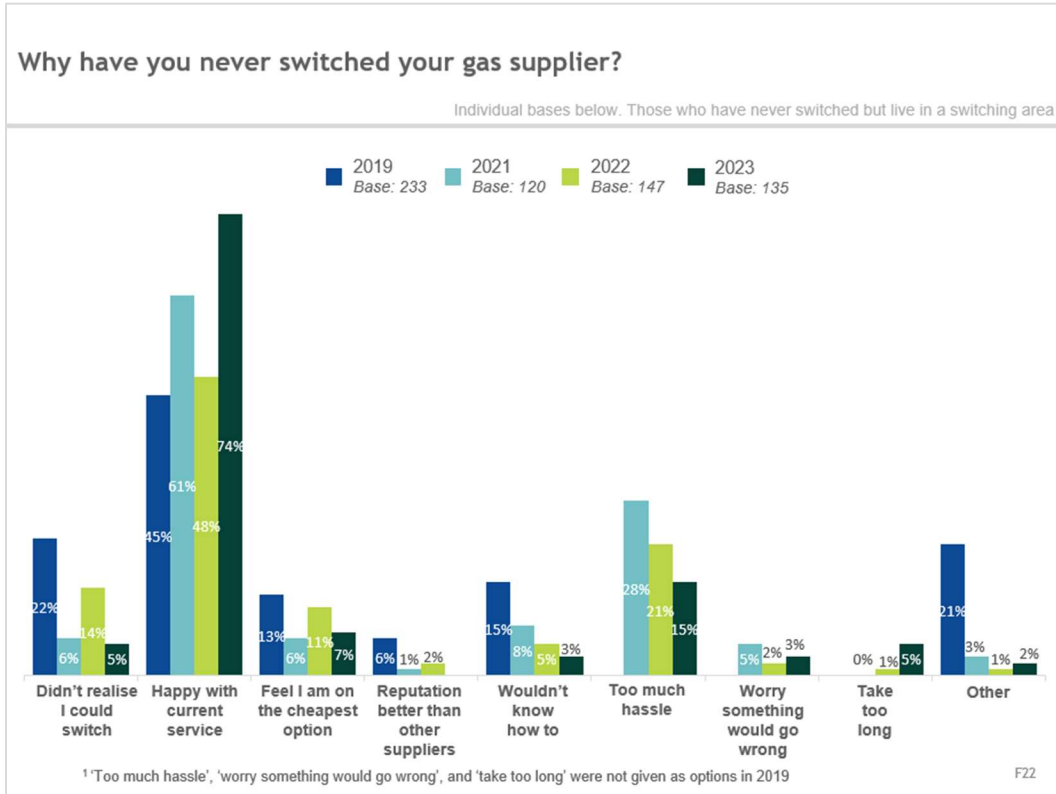
Table 8.11 Reasons for not switching electricity supplier by demographics, location, deprivation, tenure, disability/illness, children, confidence using the internet and electricity payment method

		Didn't realise I could switch	Happy with current service	Feel I am on the cheapest option	Reputation better than other suppliers	Wouldn't know how to	Too much hassle	Worry something would go wrong	Take too long	Other
Overall	All Base: 720	5%	63%	9%	5%	5%	31%	6%	4%	1%
Age	Under 35 Base: 110	8%	61%	14%	3%	3%	25%	3%	5%	5%
	35-44 Base: 115	3%	56%	4%	5%	6%	33%	8%	10%	3%
	45-64 Base: 256	6%	62%	11%	4%	5%	30%	9%	2%	0%
	65 plus Base: 226	3%	70%	8%	6%	5%	34%	4%	2%	-
SEG	ABC1 Base: 355	4%	60%	8%	5%	5%	34%	6%	4%	2%
	C2DE Base: 347	6%	68%	10%	4%	5%	27%	5%	3%	1%
Location	Urban Base: 388	3%	66%	10%	4%	4%	29%	5%	3%	2%
	Rural Base: 332	7%	60%	8%	6%	6%	34%	7%	5%	0%
MDM Quintile	1 - Most deprived Base: 128	3%	62%	17%	4%	7%	30%	5%	2%	2%
	2 Base: 139	5%	64%	9%	4%	5%	31%	6%	3%	2%
	3 Base: 159	6%	65%	8%	5%	6%	29%	6%	5%	-
	4 Base: 175	4%	63%	7%	6%	5%	33%	7%	6%	1%
	5 - Least deprived Base: 119	6%	62%	4%	3%	2%	33%	6%	3%	2%
Tenure	Own home Base: 513	5%	64%	8%	5%	5%	32%	6%	4%	0%
	Private renting Base: 97	6%	63%	10%	2%	5%	25%	2%	3%	7%
	Social housing Base: 94	3%	64%	15%	3%	5%	31%	9%	5%	1%
Disability/illness	Yes Base: 138	4%	65%	17%	7%	4%	36%	5%	2%	-
	No Base: 561	5%	63%	7%	4%	5%	30%	6%	4%	2%
Children	Yes Base: 187	5%	56%	12%	4%	7%	29%	7%	7%	2%
	No Base: 532	5%	66%	8%	5%	4%	32%	5%	3%	1%
Confidence using the internet	Not confident Base: 167	5%	60%	6%	5%	8%	37%	6%	3%	-
	Neither Base: 109	6%	58%	9%	6%	7%	40%	8%	3%	-
	Confident Base: 444	4%	66%	10%	4%	3%	26%	5%	4%	2%
Electricity payment method	Prepayment meter Base: 334	4%	64%	13%	3%	4%	29%	5%	4%	2%
	Credit meter Base: 386	5%	63%	6%	6%	6%	33%	6%	4%	1%

Gas

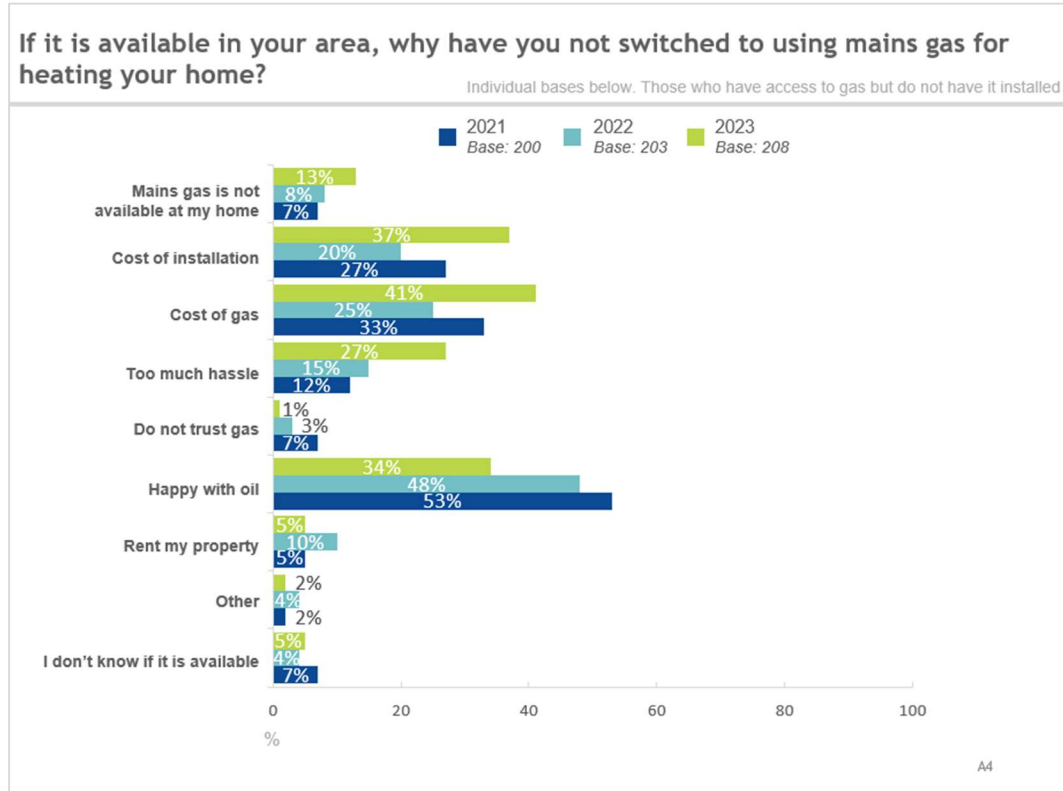
Gas customers who had the option to switch gave similar reasons for not switching supplier as electricity customers, with 75% saying they were happy with their current service and 16% believing it would be too much hassle to switch. This compares to 48% and 21% respectively who reported these reasons in the 2022 Tracker. 5% also claimed that they did not know they could switch their supplier, while 3% were unsure how to go about switching (see Figure 8.18).

Figure 8.18 Reasons for not switching gas supplier



22% of respondents confirmed that they had access to gas in their area but did not have it installed in their home. Two in five (41%) of these respondents said the reason for this was because of the cost of gas, with a further 37% mentioning the cost of installation. One third (34%) were content to remain with oil. 13% believed that mains gas is not available at their particular house and 5% did not know if gas was available at their home (see Figure 8.19).

Figure 8.19 Reasons for not switching to gas heating



Likelihood of switching in the future

One quarter (25%) of electricity customers and one fifth (18%) of gas customers who are able to switch suppliers said that they were quite or very likely to switch their supplier in the next 12 months (see Figures 8.20 and 8.21).

Figure 8.20 Likelihood of switching electricity supplier

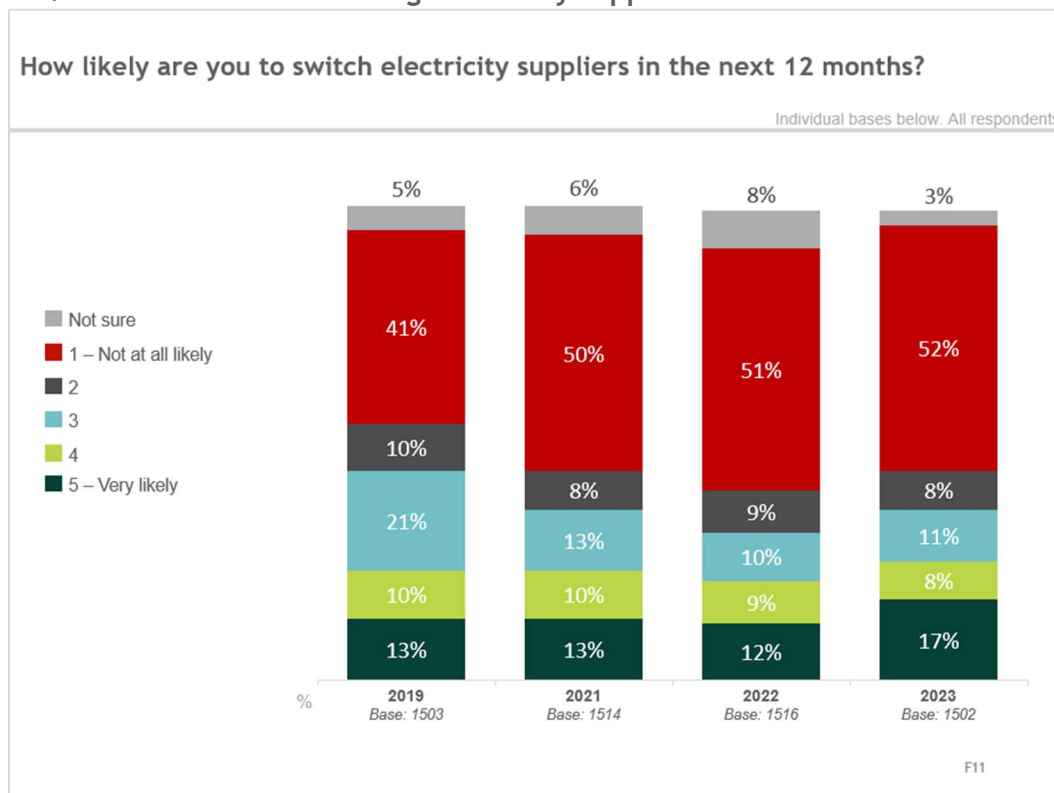
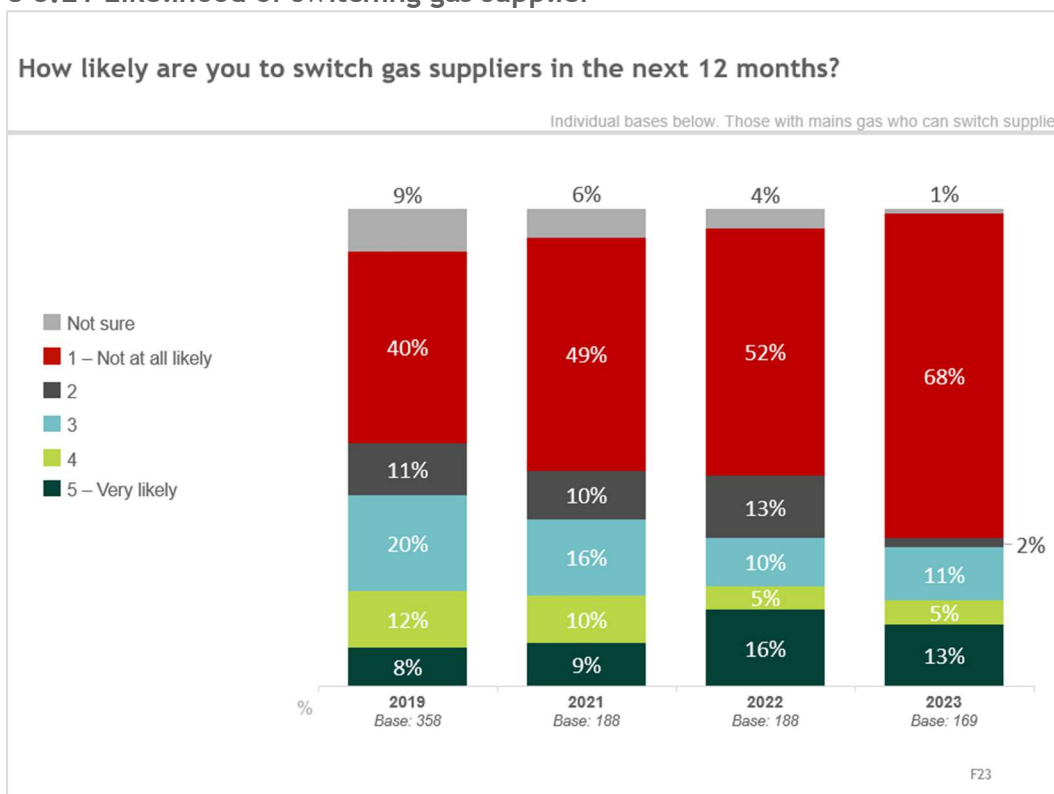


Figure 8.21 Likelihood of switching gas supplier



Some subgroups were significantly more likely to anticipate switching electricity supplier in the next year (see Table 8.12). These included:

- Respondents aged 18 to 34 (26%), 35 to 44 (33%), and 45 to 64 (27%) were more likely than those aged 65 and over (18%) to suggest they would be likely to switch electricity supplier in the next 12 month;
- Those living in urban areas (30%) were more likely to say they would switch their supplier than those in rural areas (19%);
- One third (32%) of respondents who have children in their household said they would be likely to switch electricity supplier, compared to under one quarter (23%) of those who do not have children;
- Respondents who have access to the internet (27%) and who consider themselves to be confident internet users (29%) were more likely to say they would switch electricity supplier in the next 12 months than those who do not have internet access (9%) and who do not consider themselves to be confident internet users (14%);
- Respondents who have switched their supplier in the past three years (44%) were more likely than those who had not switched (15%) to say they would switch again in the next 12 months; and
- Over one third (36%) of those who had self-disconnected from their electricity supply said they would be likely to switch supplier in the next 12 months, compared to one quarter (24%) who had not self-disconnected.

Table 8.12 Likelihood of switching electricity supplier by demographics, location, children, internet access, confidence using the internet, electricity switching, and electricity self-disconnection

		Not likely	Neither	Likely	Don't know	Total
Overall	All <i>Base: 1502</i>	60%	11%	25%	3%	100%
Age	Under 35 <i>Base: 215</i>	58%	14%	26%	1%	100%
	35-44 <i>Base: 263</i>	49%	14%	33%	3%	100%
	45-64 <i>Base: 572</i>	58%	12%	27%	4%	100%
	65 plus <i>Base: 422</i>	71%	7%	18%	3%	100%
Location	Urban <i>Base: 905</i>	57%	11%	30%	3%	100%
	Rural <i>Base: 597</i>	64%	12%	19%	4%	100%
Children	Yes <i>Base: 459</i>	51%	14%	32%	3%	100%
	No <i>Base: 1040</i>	64%	10%	23%	3%	100%
Internet access	Yes <i>Base: 1401</i>	58%	12%	27%	3%	100%
	No <i>Base: 101</i>	84%	5%	9%	2%	100%
Confidence using internet	Not confident <i>Base: 268</i>	75%	9%	14%	3%	100%
	Neither <i>Base: 221</i>	65%	6%	25%	4%	100%
	Confident <i>Base: 1013</i>	55%	13%	29%	3%	100%
Electricity switching	Switchers <i>Base: 541</i>	35%	17%	44%	4%	100%
	Non-switchers <i>Base: 961</i>	74%	8%	15%	2%	100%
Electricity self-disconnection	Yes <i>Base: 168</i>	47%	15%	36%	1%	100%
	No <i>Base: 1325</i>	62%	11%	24%	3%	100%

Percentages cited in this report were calculated using unrounded figures then rounded to the nearest whole percent. Percentages for categories in the charts therefore may not sum to 100% due to rounding. Percentages cited that combine multiple response categories may not be equal to the sum of the rounded percentages for these categories.

9. Payment difficulties

In this section we gain an insight into the extent to which domestic consumers experience issues with paying their energy bills in terms of:

- Current financial situation;
- Reasons for being without energy;
- Length of time without energy; and
- Methods to reduce spend on energy.

Key findings

- The proportion of respondents who sometimes struggle to pay their electricity bills has decreased from 39% to 33%:
 - The proportion who often or always struggle to pay has remained the same (4%).
- For gas, the proportion of consumers who sometimes struggle to pay has increased from 33% to 36%:
 - However, the proportions who often or always struggle has decreased from 7% to 5%.
- 20% of respondents with a prepayment meter reported that they had run out of money on their meter and had gone without electricity over the past year,
 - These figures are similar to those obtained in 2022, in which 18% with a prepayment meter had gone without electricity.
- 9% of consumers reported that they have had to delay or go without other essentials so that they could pay for electricity, a reduction from 11% in 2022.
- 10% reported delaying or going without other essentials to pay for gas. This is consistent with results from the 2022 Tracker.
- 71% of respondents have reduced their electricity usage over the last year, which represents a decrease from 85% in the 2022 Tracker. 6% had borrowed money to pay their electricity bills, the same as in 2022.
- This was also true for gas customers, with 71% reducing their usage (compared to 87% in 2022) and 10% borrowing money to pay their bill (8% in 2022).

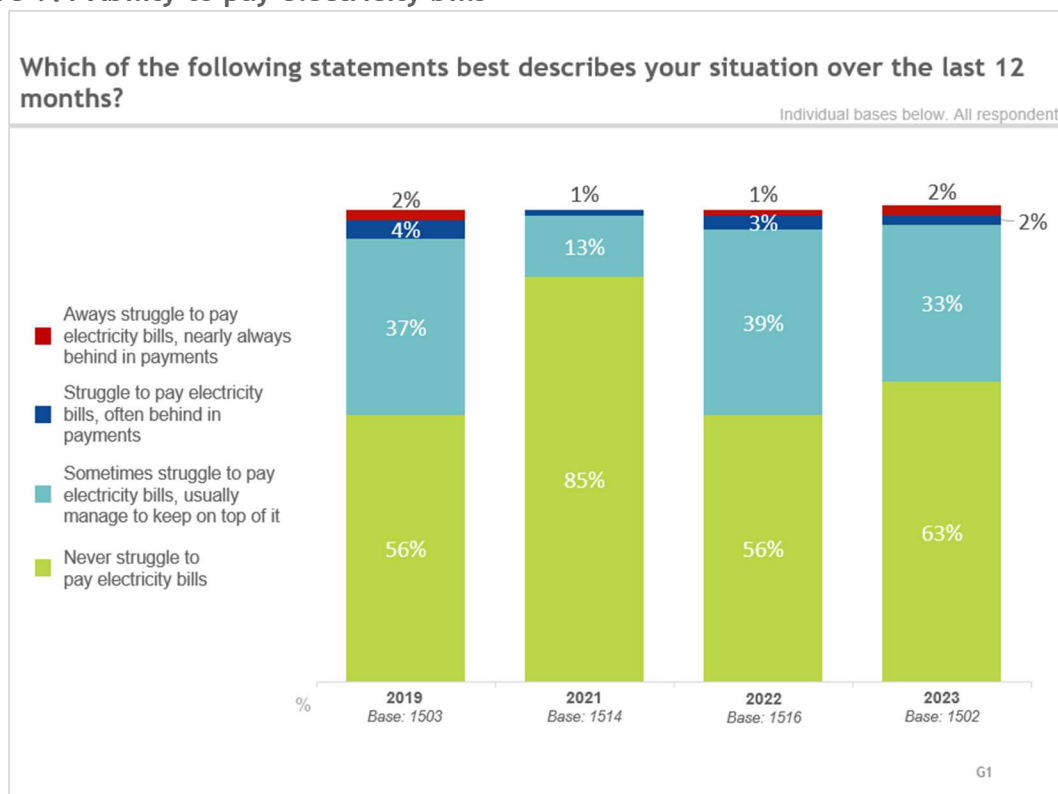
Current financial situation

Respondents were asked to describe their financial situation over the past 12 months in terms of their ability to pay their electricity and gas bills (see Figures 9.1 to 9.9).

Electricity

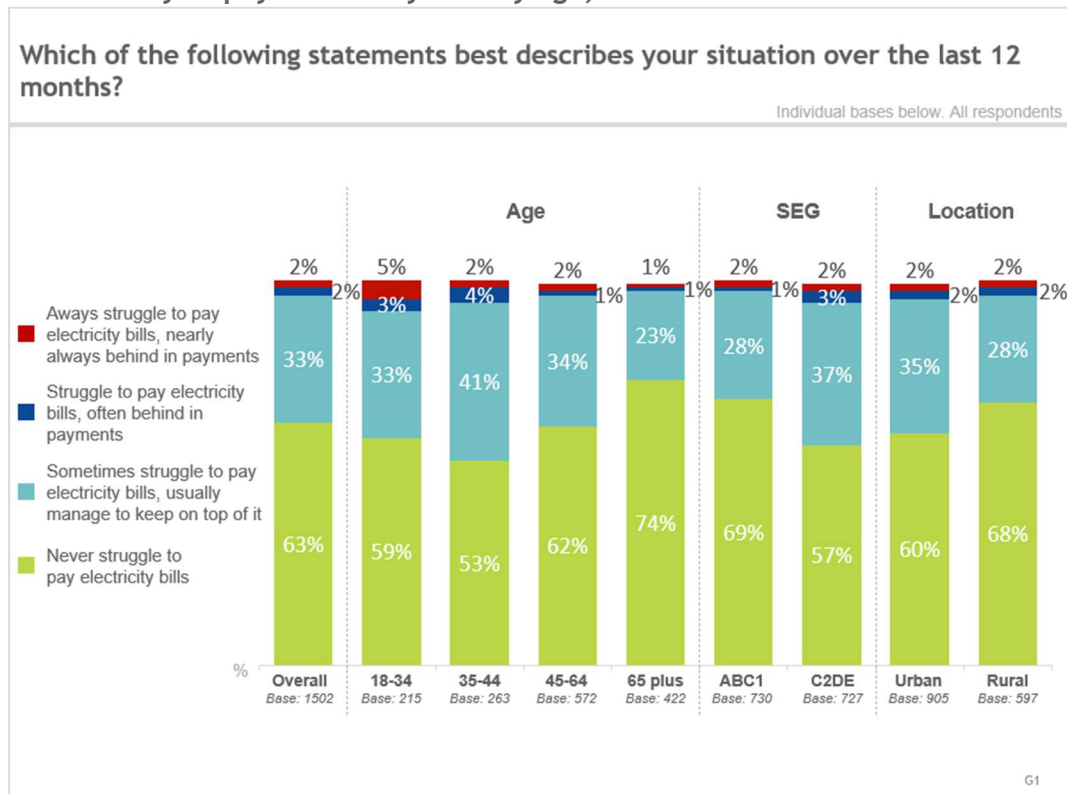
Under two thirds (63%) of respondents reported that they never struggle to pay their electricity bills, increasing from 56% in 2022. One third (33%) said they sometimes struggle to pay their bills but usually were able to keep on top of them, while 4% stated that they were often or always behind in their payments.

Figure 9.1 Ability to pay electricity bills



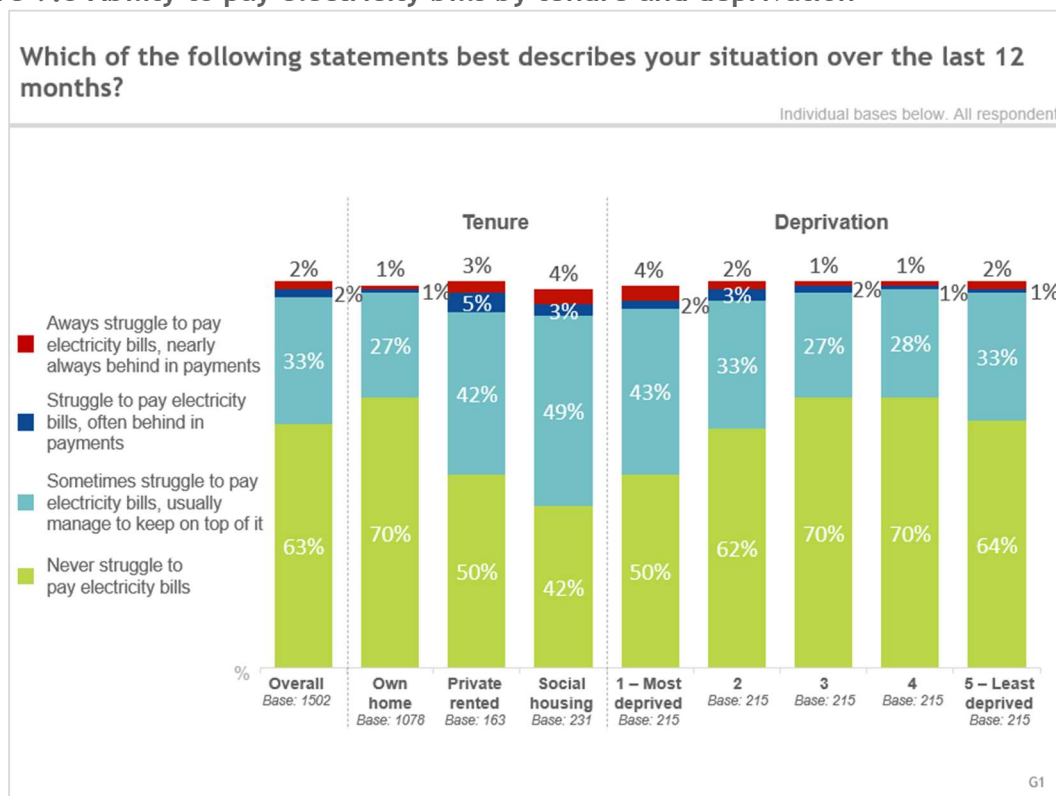
Respondents aged 65 and over (74%) were more likely than all other age groups to say they never struggle with their electricity bills, with those in the 18 to 34 age group more likely to state they sometimes struggle (33%, compared to 23% aged 65 plus), or that they are often or always behind on their bills (8%, compared to 2% aged 65 plus) than those in the older age group. 37% of those in the C2DE group reported that they sometimes struggle to pay, compared to 28% in the ABC1 group. Respondents living in urban areas (35%) were also more likely to say they sometimes struggle when compared to those living in rural areas (28%) (see Figure 9.2).

Figure 9.2 Ability to pay electricity bills by age, SEG and location



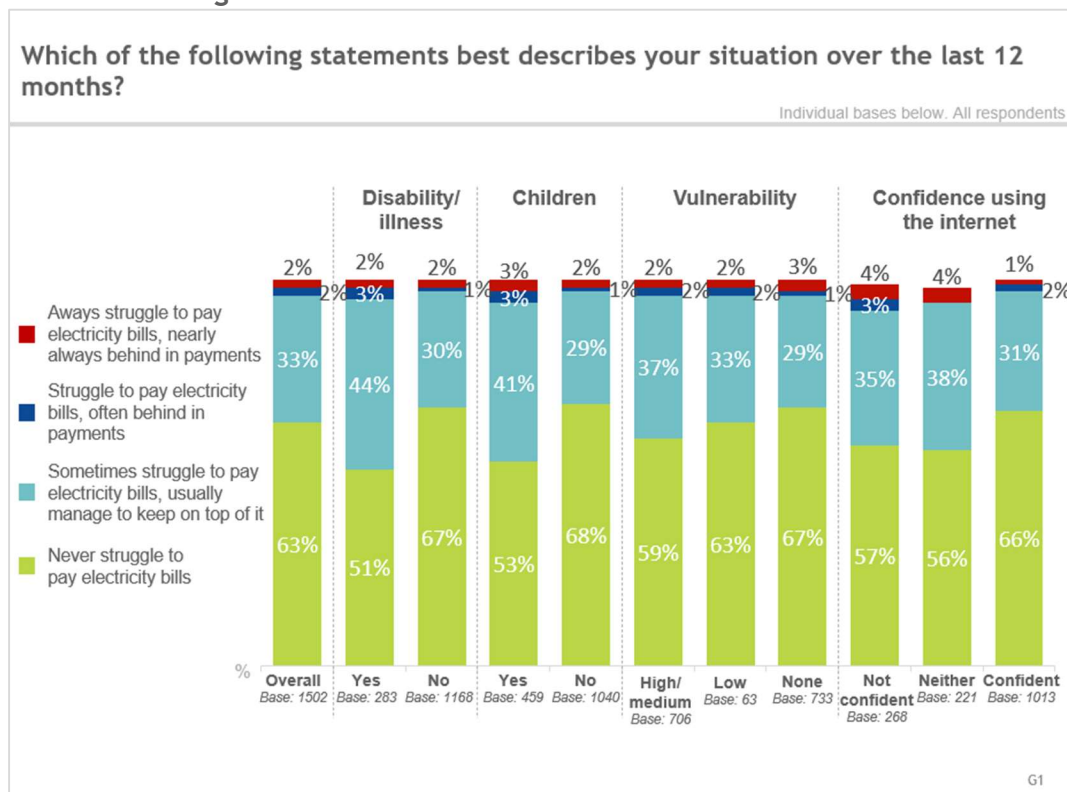
Those who live in social housing (49%) and who privately rent (42%) were more likely to say they sometimes struggle to pay their bills than those respondents who own their home (27%). 7% of respondents who live in social housing also stated that they often or always struggle to keep up with payments, compared to 2% of those who own their home. Respondents who live in the most deprived areas (43%) were more likely to report that they sometimes struggle to pay their electricity bill than those living in the least deprived areas (33%) (see Figure 9.3)

Figure 9.3 Ability to pay electricity bills by tenure and deprivation



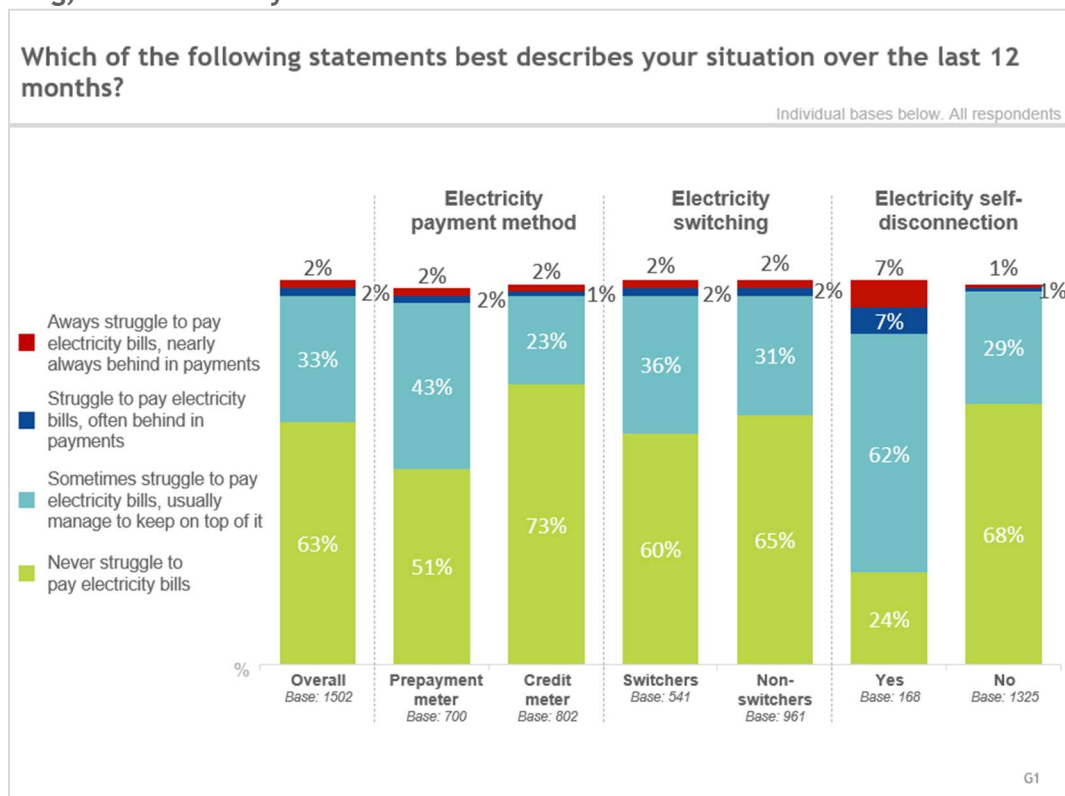
Respondents who have or live with someone who has a disability or illness (44%) were more likely than those who do not (30%) to say they sometimes struggle with their electricity bills, while those who have children in their household (41%) were more likely to state that they sometimes struggle when compared with those who do not have children (29%). Over one third (37%) of respondents who are considered to be in the high or medium vulnerability group said they sometimes struggle, compared to 29% of those who are not vulnerable. Those who are not confident internet users (7%) were more likely to say they often or always struggle to keep up with payments than respondents who consider themselves to be confident internet users (3%) (see Figure 9.4).

Figure 9.4 Ability to pay electricity bills by disability/illness, children, vulnerability, and confidence using the internet



Respondents who have a prepayment meter for electricity (43%) were more likely than those with a credit meter (23%) to say they sometimes struggle to pay their electricity bills. While the difference was not statistically significant, electricity switchers (60%) were not as likely as non-switchers (65%) to state they never struggle to pay their bills. Three in five (62%) of those who have self-disconnected from their electricity supply reported that they sometimes struggle to pay their electricity bill, with a further 14% saying they often or always struggle to keep up with payments. This compares to 29% and 2% respectively of those who have not self-disconnected (see Figure 9.5).

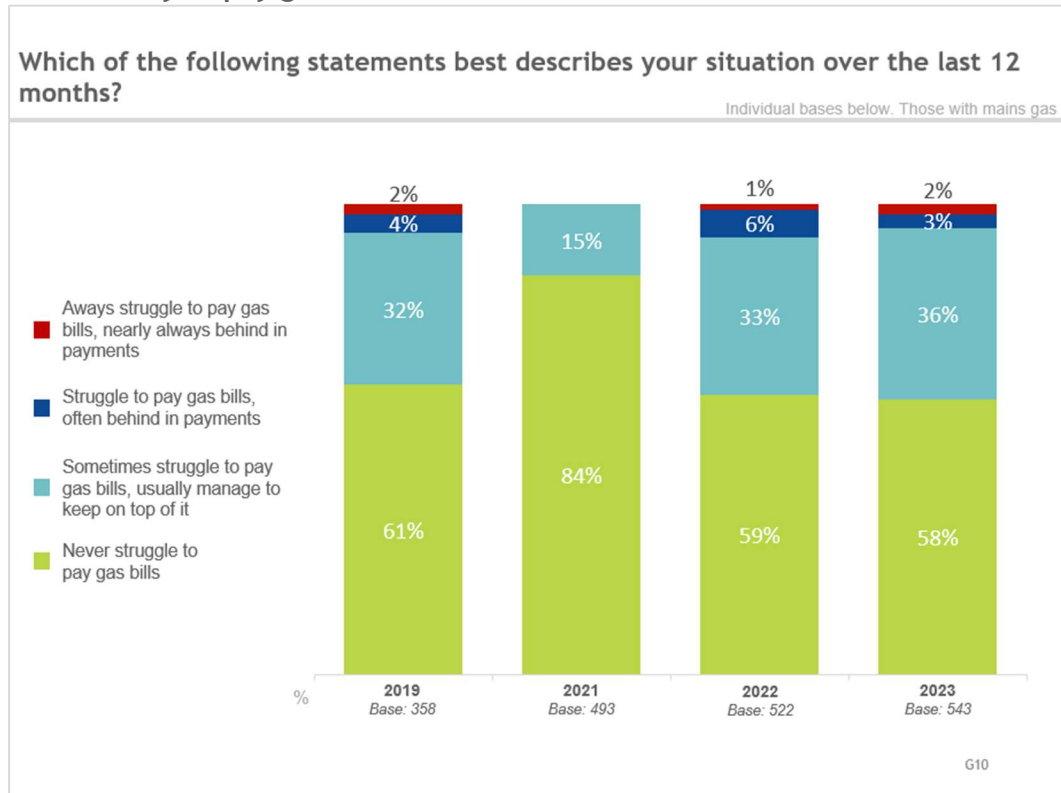
Figure 9.5 Ability to pay electricity bills by electricity payment method, electricity switching, and electricity self-disconnection



Gas

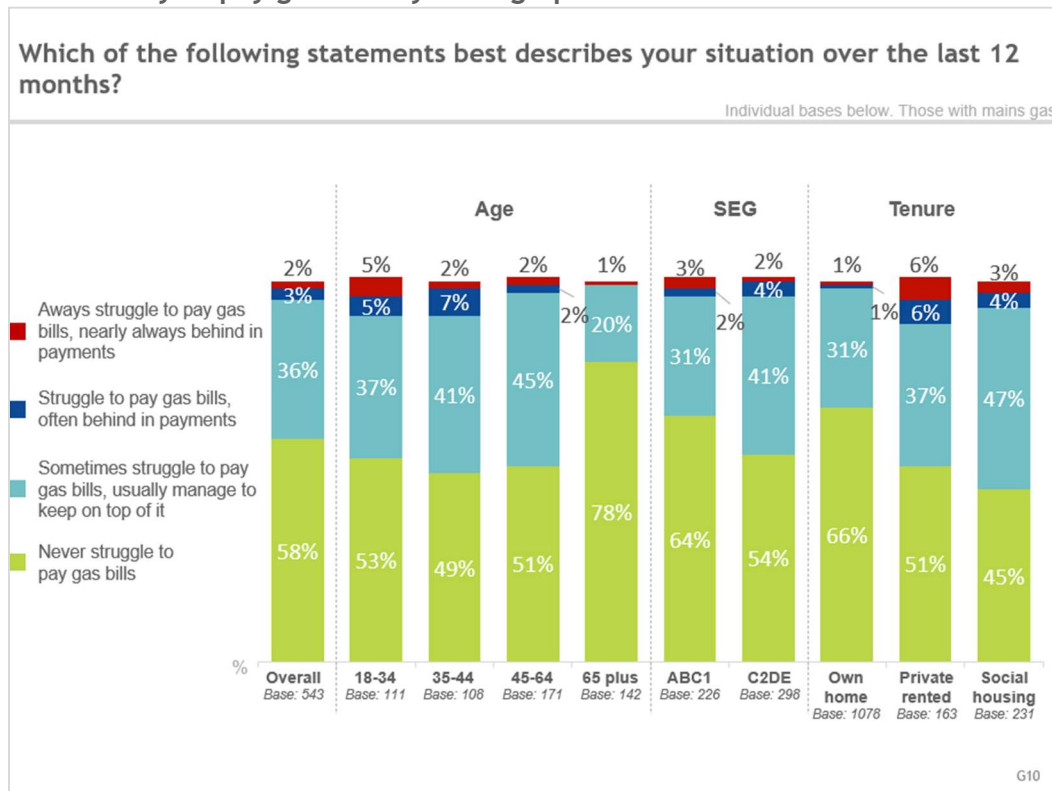
58% of gas consumers stated that they never struggle to pay their gas bills and one third (36%) said that they sometimes struggle but were able to manage their bills, with customers on a prepayment meter (44%, compared to 29% with a credit meter) again more likely to say they sometimes struggle to pay their bills. 5% reported that they are often or always behind in paying their bills (see Figure 9.6).

Figure 9.6 Ability to pay gas bills



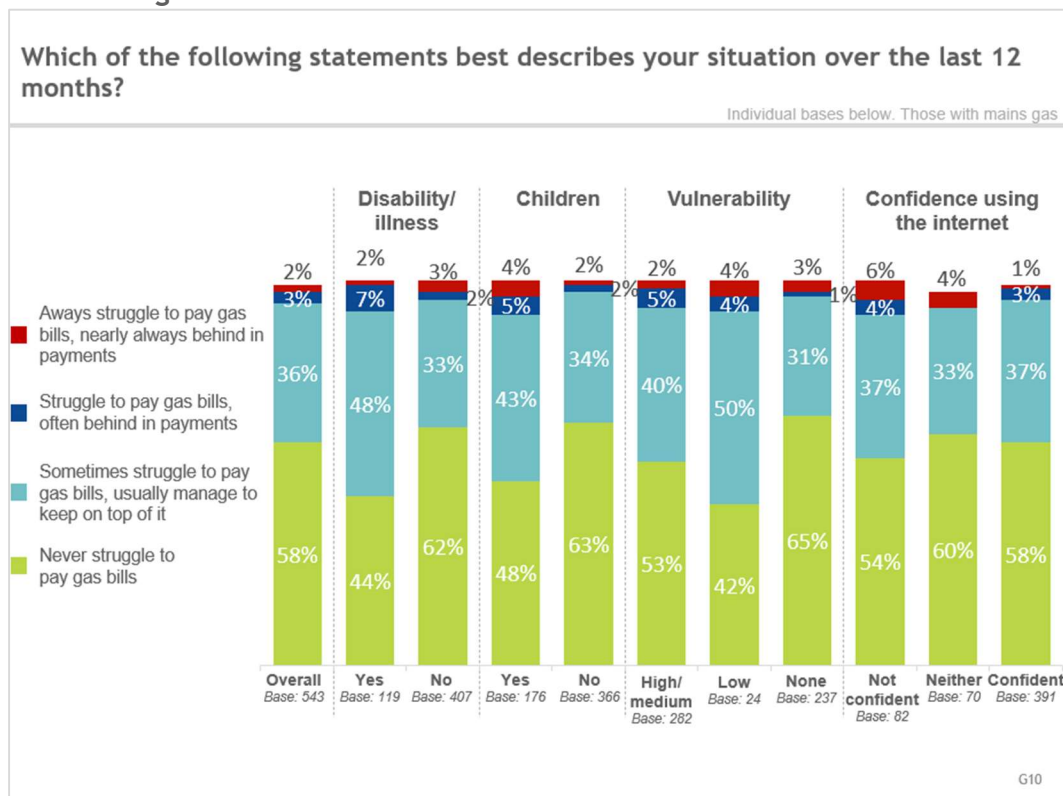
Gas customers aged 18 to 34 (37%), 35 to 44 (41%) and 45 to 64 (45%) were more likely to say they sometimes struggle to pay their gas bill than those aged 65 and over (20%), with respondents in the younger age group (10%) also more likely to say they often or always struggle to keep up with payments than those in the older group (1%). Two in five (41%) respondents in the C2DE group said they sometimes struggle, compared to under one third (31%) of those in the ABC1 group. Respondents living in social housing were both more likely to state they sometimes struggle (47%) and that they often or always struggle (7%) than those who own their home (31% and 2% respectively) (see Figure 9.7).

Figure 9.7 Ability to pay gas bills by demographics and tenure



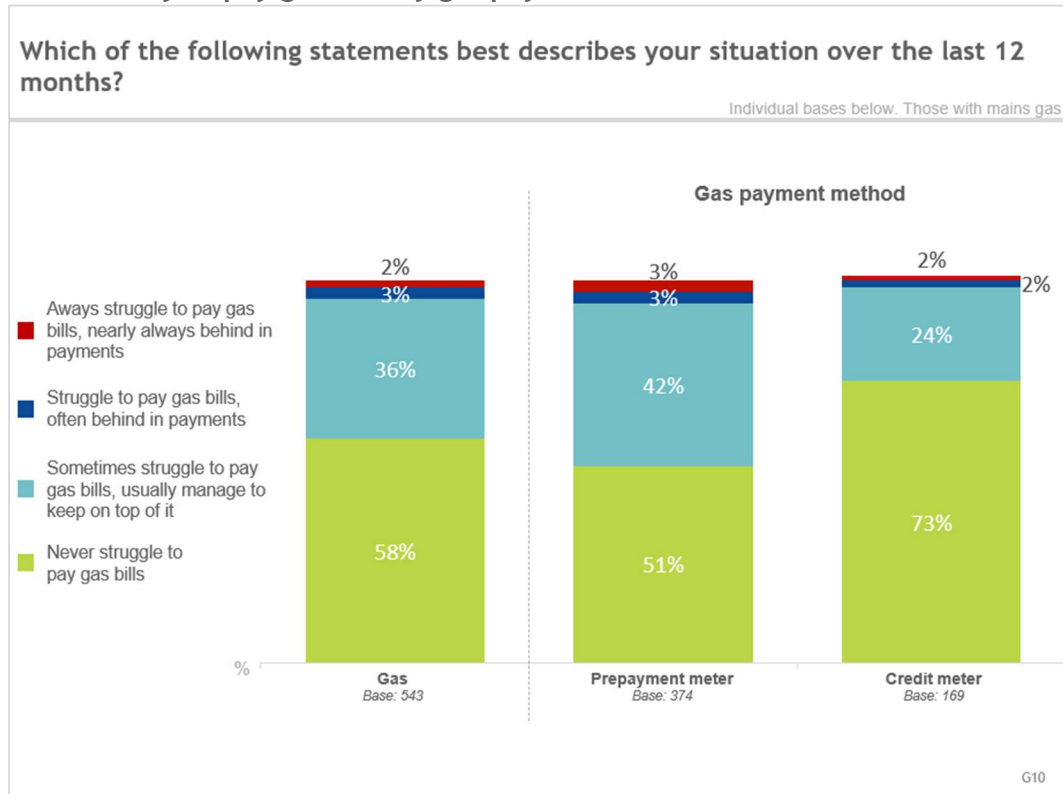
Respondents who have or live with someone who has a disability or illness (48%) were more likely to report that they sometimes struggle to pay their gas bill than those who do not have someone with a disability or illness in their household (33%). Those who have children (9%) were more likely to say they often or always struggle with their gas bill than those who do not have children (4%), as were those who would be considered to be in the high or medium vulnerability group (7%) when compared with respondents who are not vulnerable (4%). 10% of gas customers who are not confident internet users stated they often or always struggle, compared with 4% of confident internet users (see Figure 9.8).

Figure 9.8 Ability to pay gas bills by disability/illness, children, vulnerability, and confidence using the internet



Respondents who have a prepayment meter for gas (42%) were more likely than those who have a credit meter (24%) to report that they sometimes struggle with their gas bill (see Figure 9.9).

Figure 9.9 Ability to pay gas bills by gas payment method



Reasons for being without energy

Electricity

Almost all (97%) respondents with a credit meter said that in the past 12 months they had never gone without electricity that they needed because of the cost, with 3% saying this occurred a few times a year or once a month (see Figure 9.10). Respondents with an electricity prepayment meter were more likely than credit customers to have gone without electricity in the past 12 months. 14% had occasionally gone without electricity, 4% said this happened around once a month and 2% mentioned that they go without electricity most weeks (see Figure 9.11).

Figure 9.10 Incidence of going without electricity (no prepayment meter)

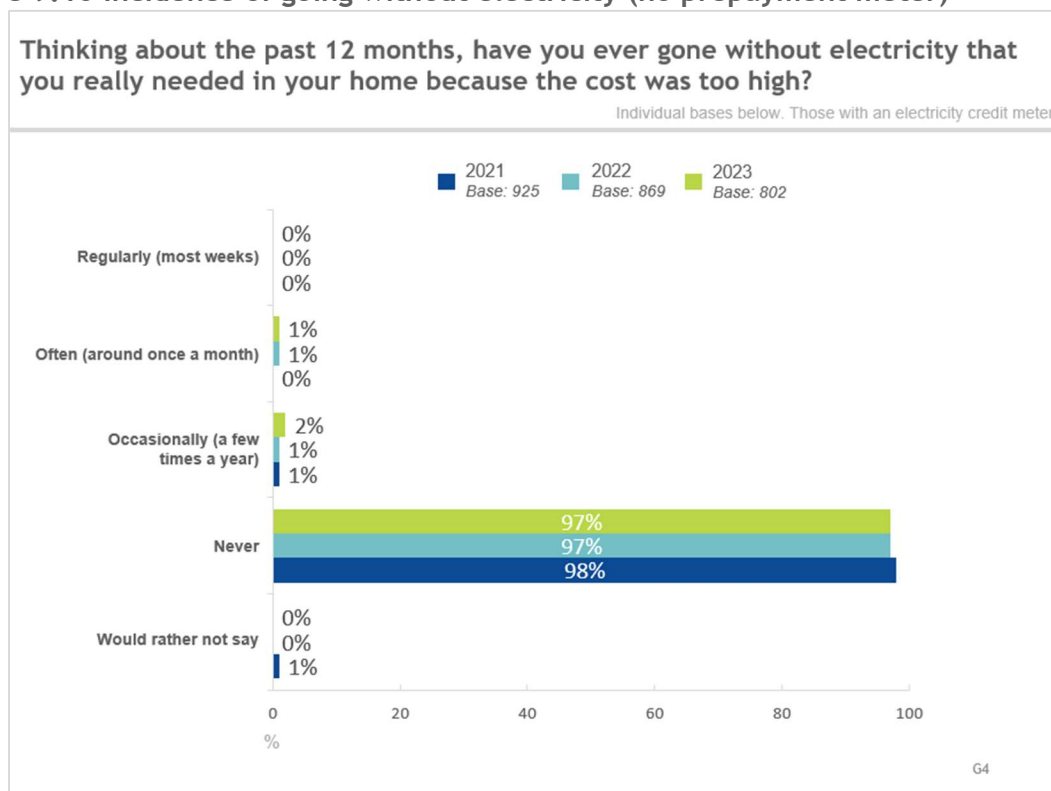
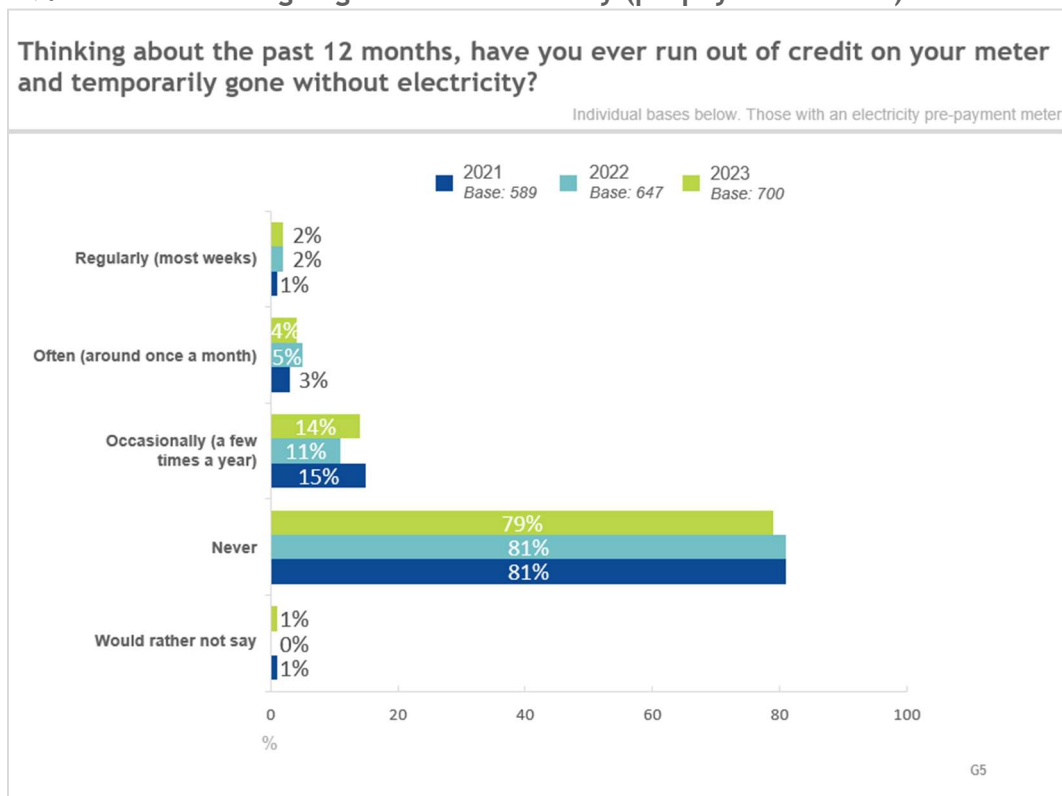
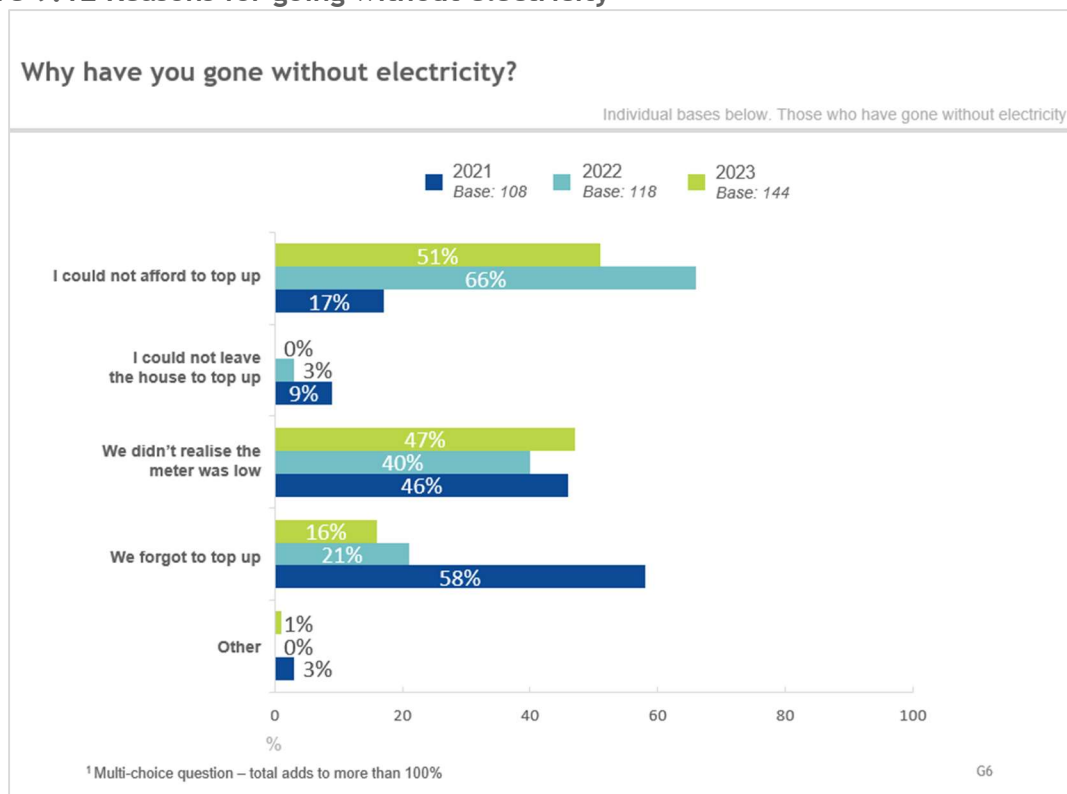


Figure 9.11 Incidence of going without electricity (prepayment meter)



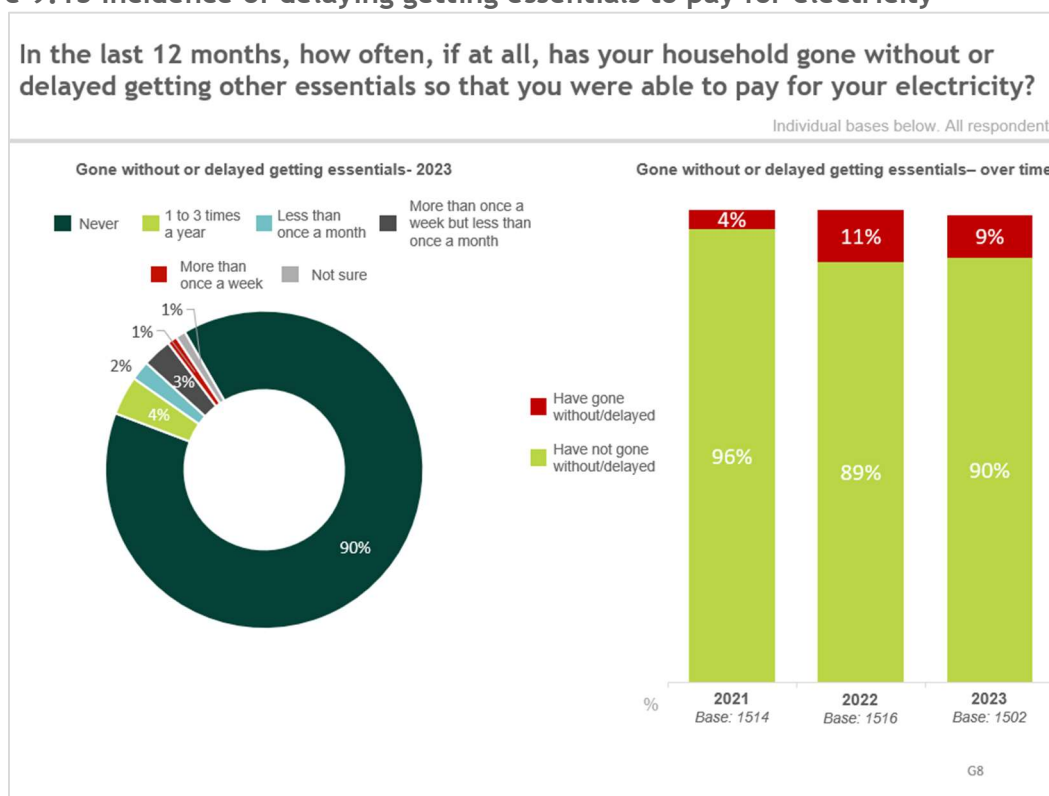
Of those respondents with a prepayment meter who had run out of credit on the meter and temporarily gone without electricity, 51% said that they could not afford to top up, and 47% did not realise their meter was low. 16% mentioned that they had forgot to top up (see Figure 9.12).

Figure 9.12 Reasons for going without electricity



All respondents were asked if they had gone without or had delayed getting other essentials so that they would be able to pay for electricity. While the majority (90%) confirmed that this was not something they had to do, 4% reported that they had to do this between one and three times a year, 2% had to do this less often than once a month but more than three times a year, and 1% had to do this less often than once a month but more than three times a year. A further 3% had to do this at least once a month, including 1% who reported it occurring more than once a week (see Figure 9.13).

Figure 9.13 Incidence of delaying getting essentials to pay for electricity



Those who were significantly more likely to have gone without getting other essentials to pay for electricity included the following (see Figures 9.14 to 9.17):

- Respondents aged 18 to 34 (11%), 35 to 44 (14%), and 45 to 64 (12%) were more likely to say they had gone without essentials at least once than those aged 65 and over (3%);
- 13% of those in the C2DE group reported having to go without essentials at least once, compared to 6% in the ABC1 group;
- Respondents living in the most deprived areas (16%) were more likely to have delayed getting essentials than those in the least deprived areas (5%);
- Those living in social housing (23%) were more likely to say they had delayed getting essentials than those who own their home (6%);
- Almost one in five (18%) of those who have or live with someone who has a disability or illness reported they had to go without essentials at least once, compared to 7% of those who do not have someone with a disability or illness in their household;
- Respondents who have children in their household (14%) were more likely than those without (7%) to say they had delayed getting essentials;
- Those who would be considered to be in the high or medium vulnerability group (12%) were more likely to have delayed getting essentials to pay for electricity than those who are not considered vulnerable (7%);

- 13% of respondents who do not consider themselves to be confident internet users said they had delayed getting essentials, compared to 8% who are confident users;
- Respondents who have a prepayment meter for electricity (15%) were more likely than credit customers (4%) to report they had gone without essentials in the past 12 months;
- 11% of electricity switchers stated they had gone without essentials, compared to 8% of non-switchers; and
- Over one third (37%) of those respondents who had self-disconnected from their electricity supply reported they had delayed or gone without essentials in the past 12 months to get electricity. This compares to 6% of those who had not self-disconnected from their supply in the last 12 months.

Figure 9.14 Incidence of delaying getting essentials to pay for electricity by demographics

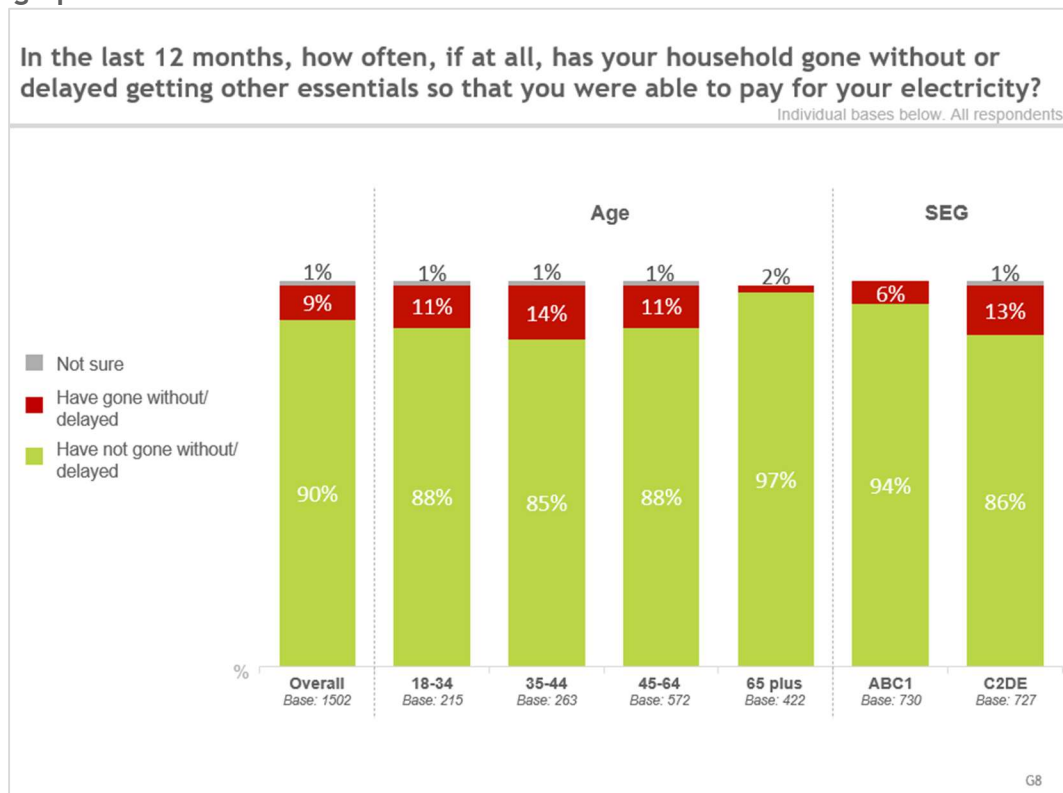


Figure 9.15 Incidence of delaying getting essentials to pay for electricity by deprivation and tenure

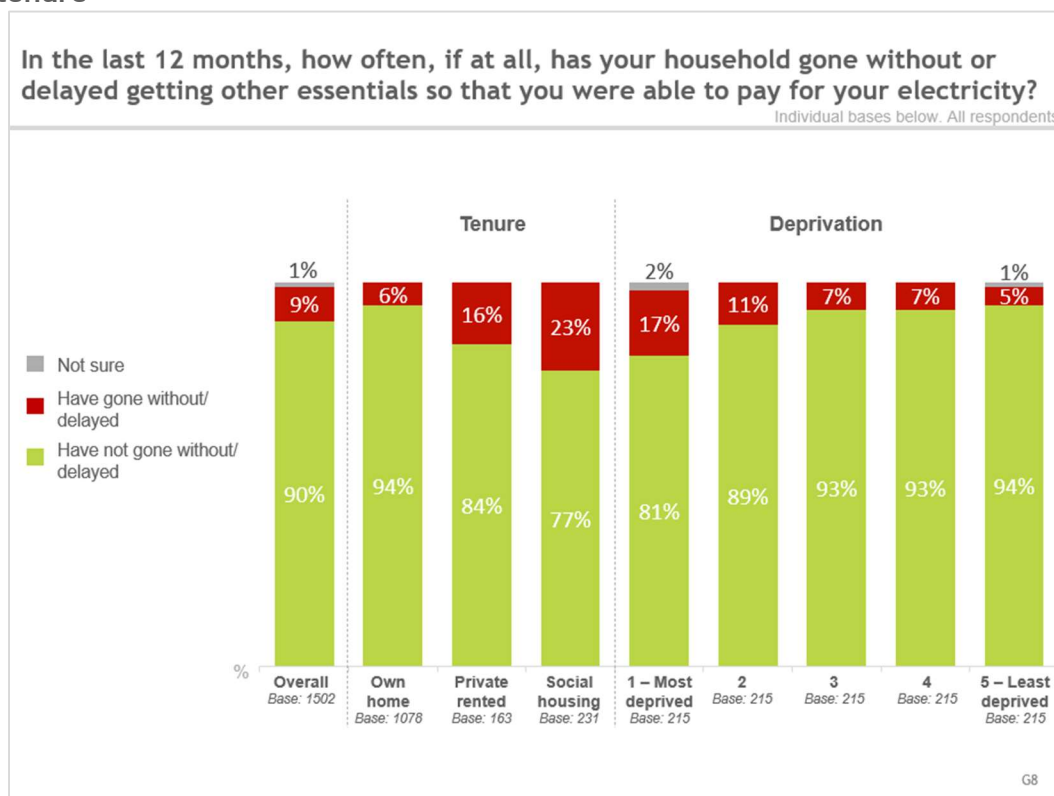


Figure 9.16 Incidence of delaying getting essentials to pay for electricity by disability/illness, children, vulnerability, and confidence using the internet

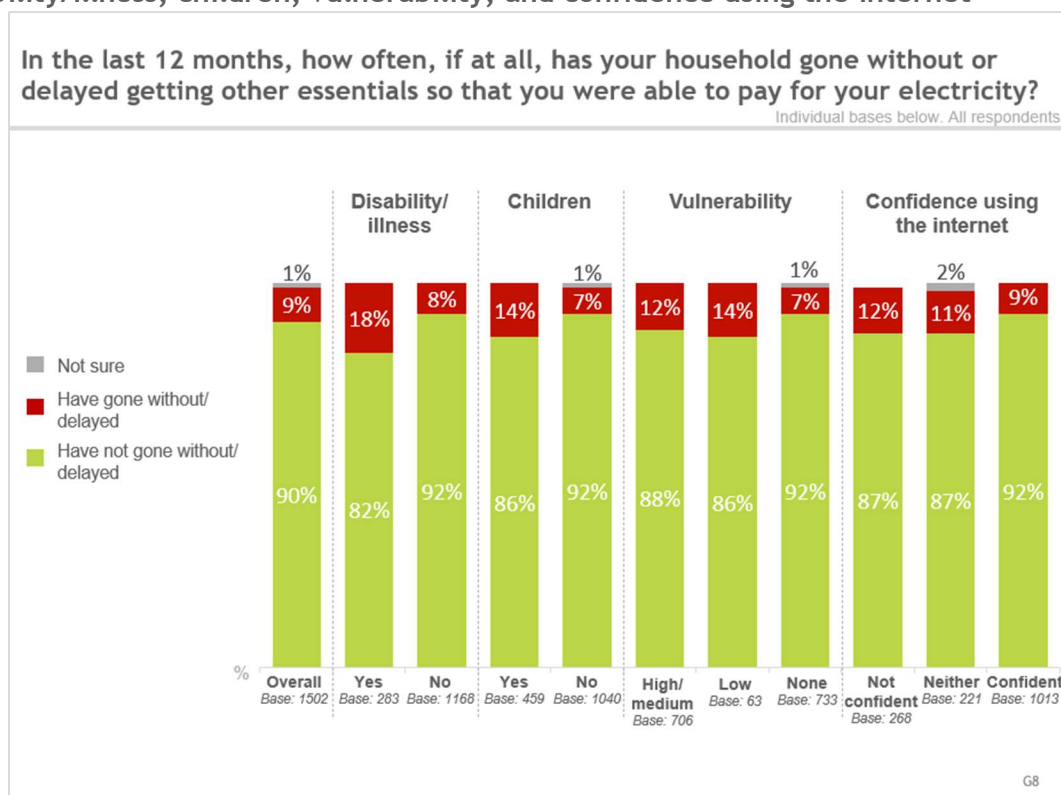
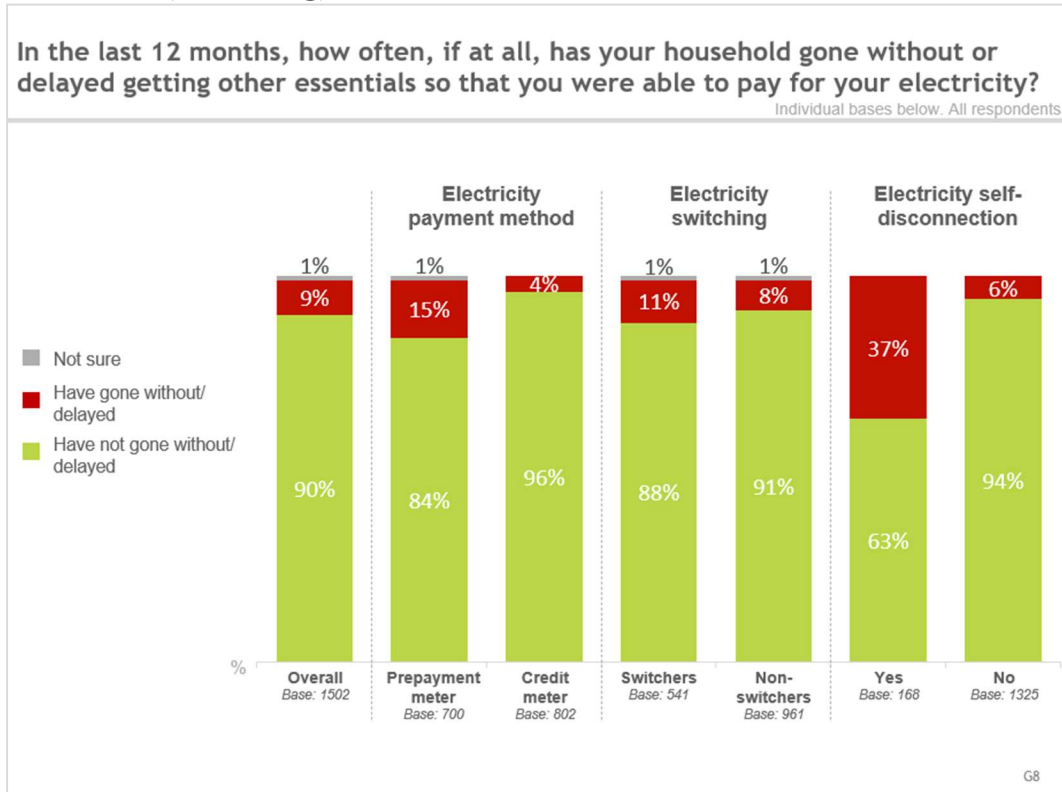
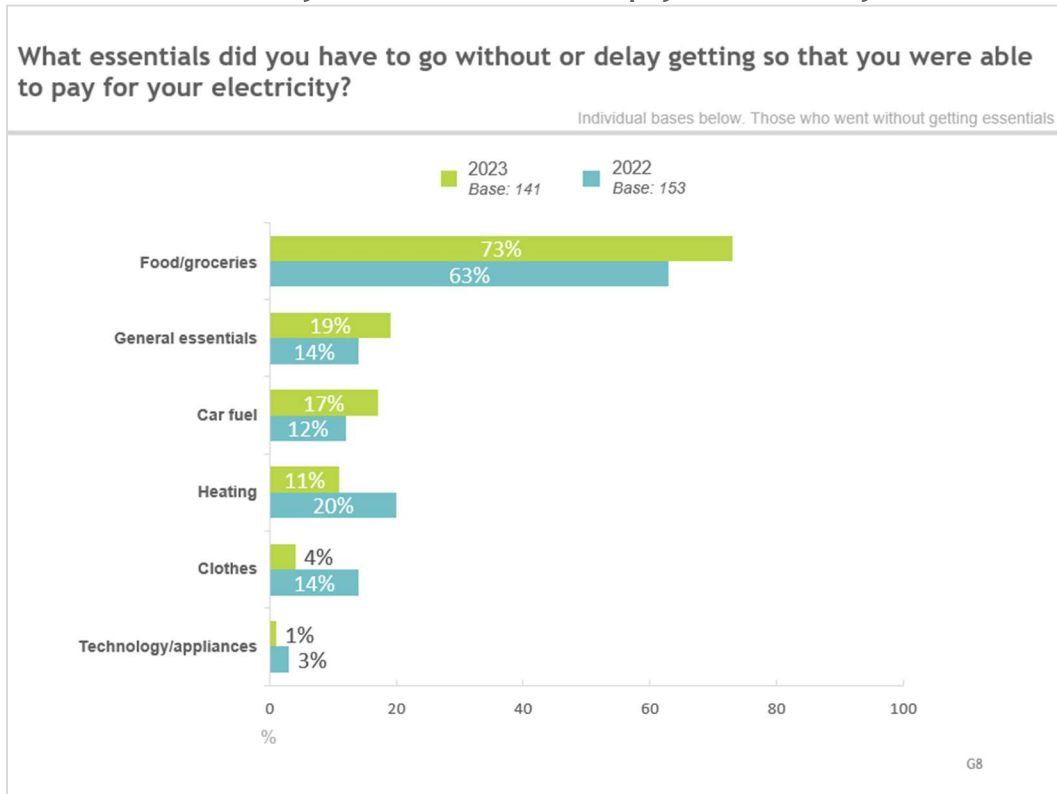


Figure 9.17 Incidence of delaying getting essentials to pay for electricity by electricity payment method, switching, and self-disconnection



Of those who had reported going without essentials, 73% said they had not bought food or groceries, while 19% did not pay for general essentials. A further 17% did not refuel their car, and 11% went without heating (see Figure 9.18).

Figure 9.18 Essentials delayed or went without to pay for electricity



Gas

Of those with a gas credit meter, 3% revealed that they have had to occasionally go without gas in the past 12 months because the cost was too high, with a further 2% saying they often or regularly had to do this (see Figure 9.19). Of those who have a gas prepayment meter, 15% reported having occasionally run out of credit, while 6% had done this often or regularly (see Figure 9.20).

Figure 9.19 Incidence of going without gas (no prepayment meter)

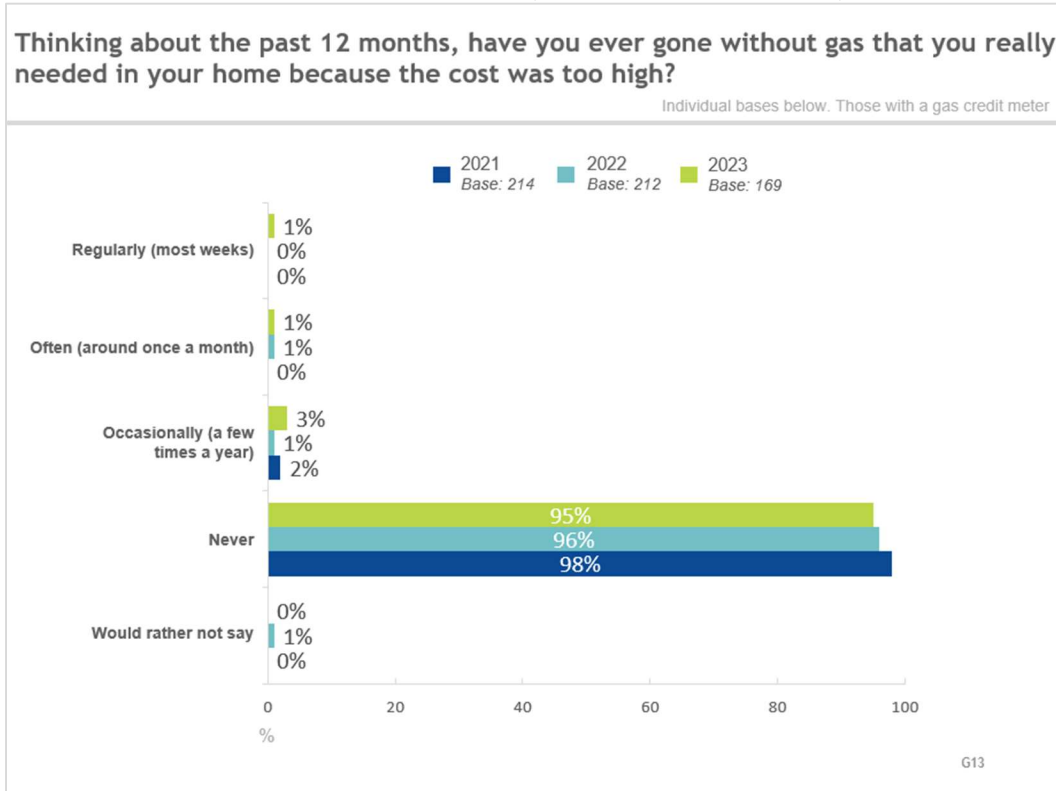
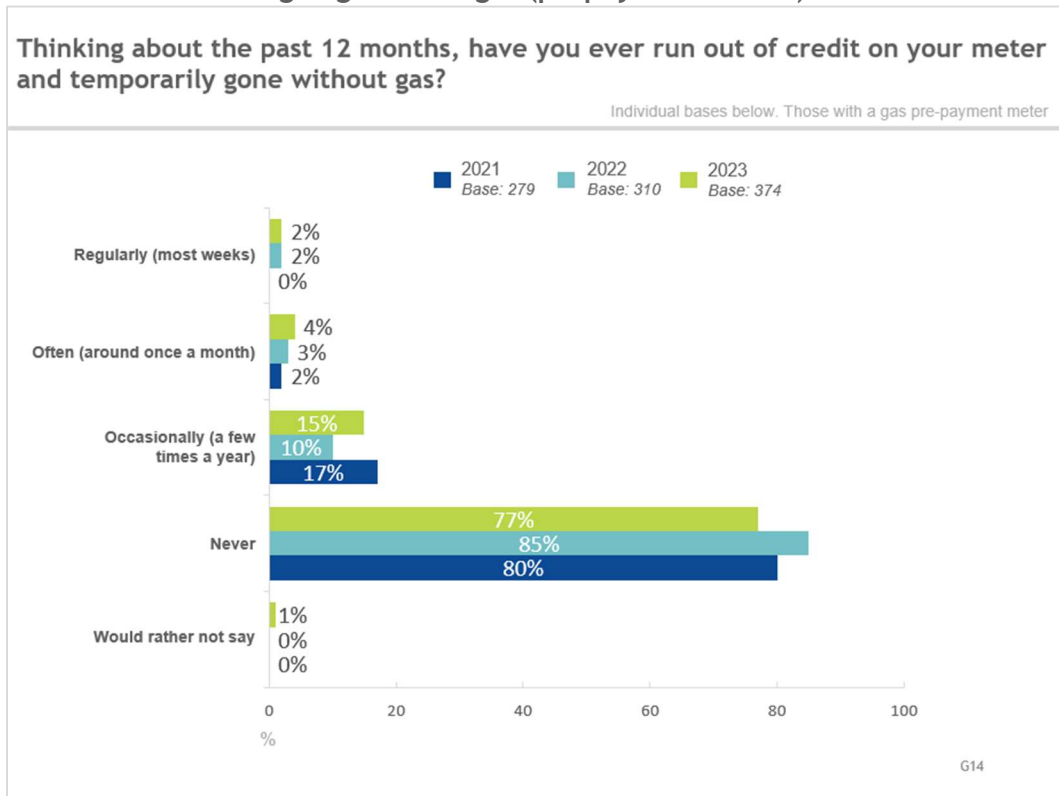
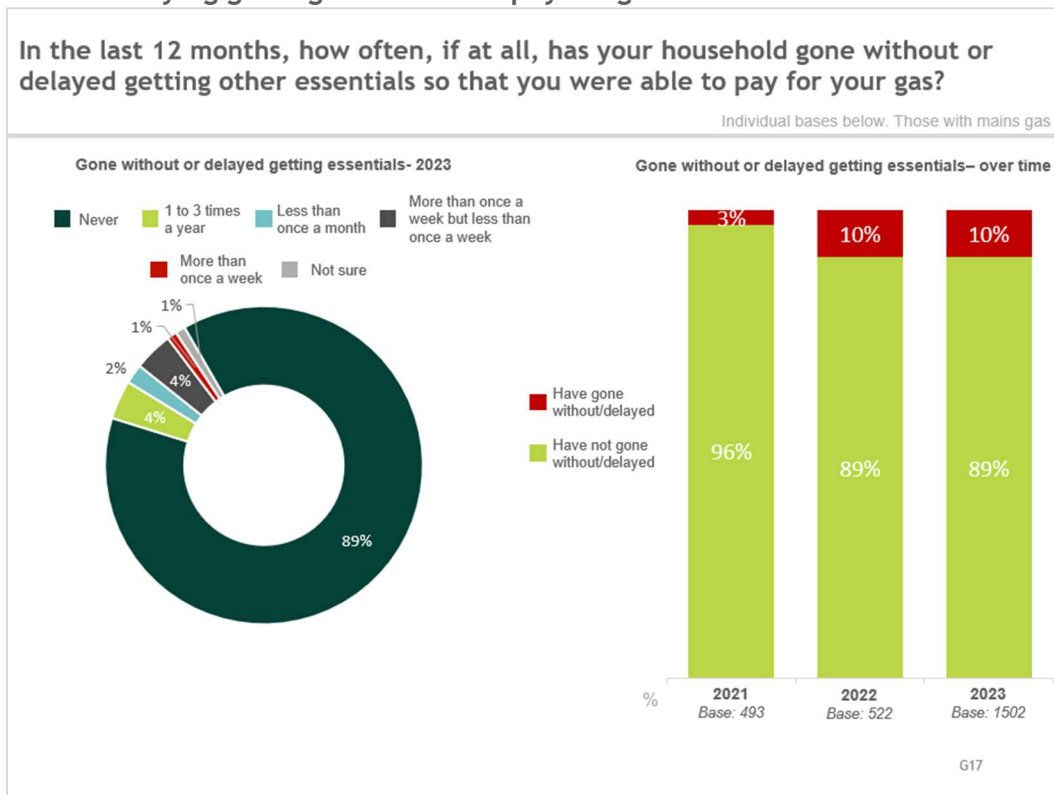


Figure 9.20 Incidence of going without gas (prepayment meter)



Those with mains gas were asked how often their household had gone without or delayed getting other essentials so that they could pay for their gas. 10% confirmed that this was the case for them on at least one occasion in the last 12 months, including 1% who said it happened more than once a week (see Figure 9.21).

Figure 9.21 Delaying getting essentials to pay for gas



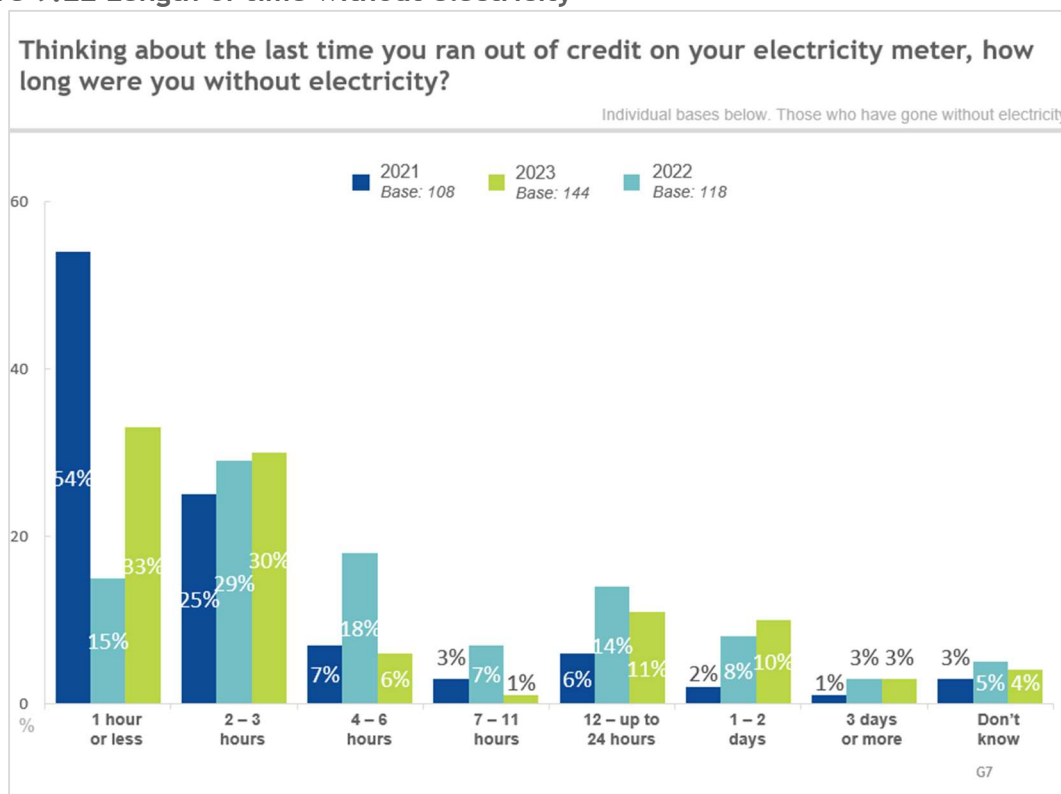
Length of time without energy

Those with a prepayment meter who had run out of credit were asked how long they were without electricity and/or gas on the last occasion that it happened.

Electricity

Four in five (83%) respondents who ran out of credit on their electricity prepayment meter reported that their supply was restored on the same day, including 33% who were without their electricity for up to one hour. However, 13% stated that they were without electricity for longer than a day (see Figure 9.22).

Figure 9.22 Length of time without electricity



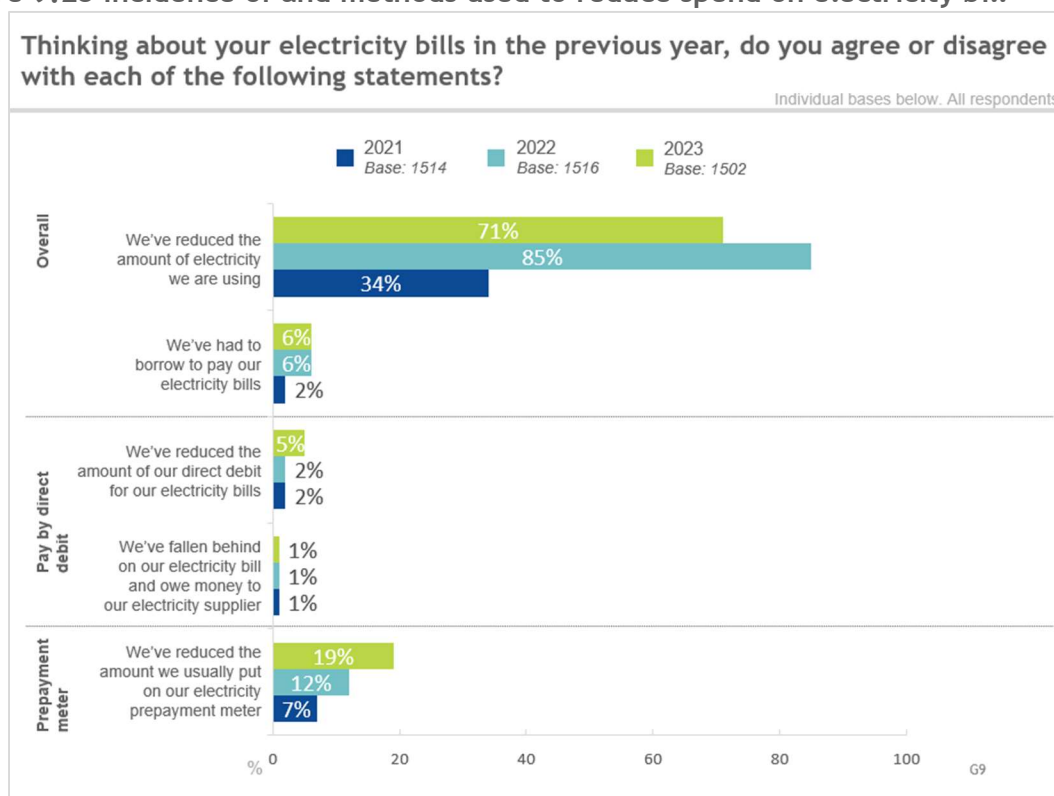
Methods to reduce spend on energy

Respondents were presented with a number of statements about their energy usage and the payment of bills and asked to confirm if any applied to their situation over the last 12 months.

Electricity

Under three quarters (71%) reported that they had reduced the amount of electricity they were using in the previous year (down from 85% in 2022), while 6% stated that they have had to borrow money to pay their electricity bills. 5% of those who pay their electricity bill by direct debit said that they have reduced the amount of direct debit on their bill, and 1% reported that they had fallen behind on their bills and owe money to their supplier. 19% of respondents with an electricity prepayment meter stated that they had reduced the amount they usually put on their meter.

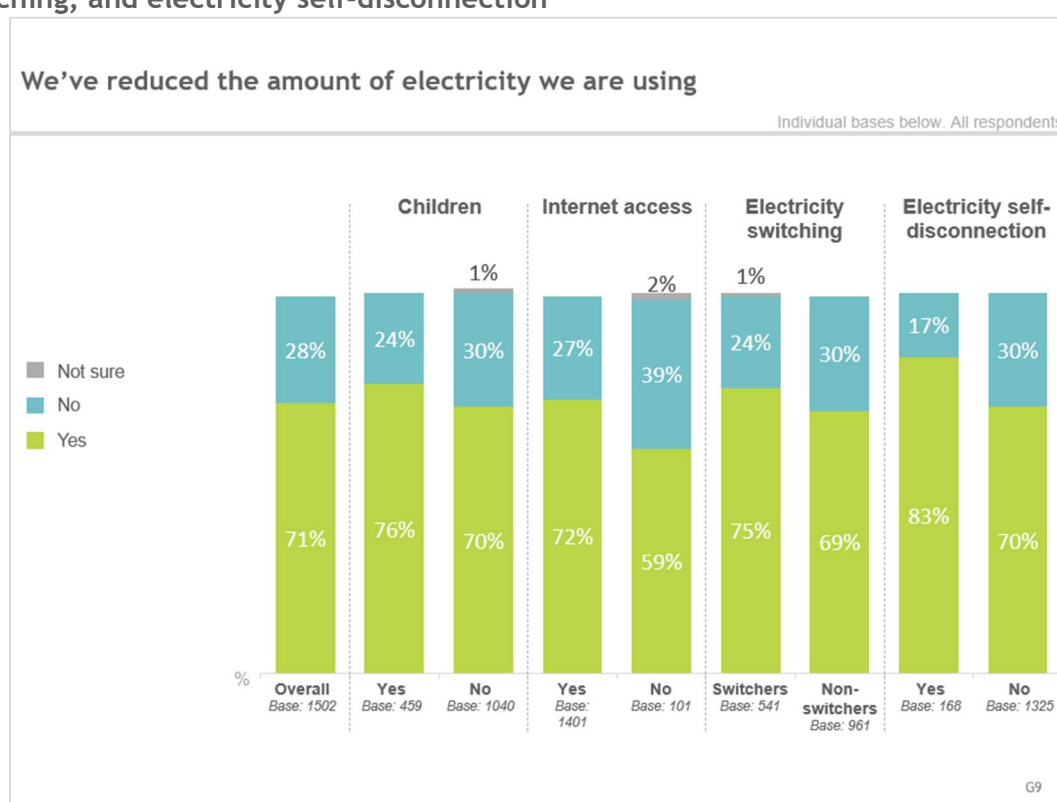
Figure 9.23 Incidence of and methods used to reduce spend on electricity bill



Several subgroups were significantly more likely to have reduced their electricity usage than others (see Figure 9.24):

- Three quarters (76%) of respondents who have children in their household said they had reduced their electricity usage, compared to 70% of those who do not have children in their household;
- Respondents who have access to the internet (72%) were more likely to have reduced their electricity usage than those who do not have access (59%);
- Electricity switchers (75%) were more likely than non-switchers (69%) to have reduced their electricity usage; and
- Over four in five (83%) of those who had self-disconnected from their electricity supply said they had reduced their electricity usage, compared to 70% who had not self-disconnected.

Figure 9.24 Reducing electricity usage by children internet access, electricity switching, and electricity self-disconnection



Similar patterns were observed amongst those who had to borrow money to pay their electricity bills (see Figures 9.25 to 9.27):

- Respondents aged 65 and over (2%) were less likely than all other age groups to say they had borrowed money to pay their electricity bills (10% aged 18 to 34, 10% aged 35 to 44, and 7% aged 45 to 64);
- Those in the C2DE group (10%) were more likely than those in the ABC1 group (3%) to report having borrowed money to pay their electricity bills;
- 8% of those who live in urban areas said they had borrowed money to pay their electricity bills, compared with 5% in rural areas;
- Those living in the most deprived areas (14%) were more likely to state they had borrowed money for their electricity bills than those in the least deprived areas (3%);

- Respondents who live in social housing (18%) and who privately rent (13%) were more likely than those who own their home (3%) to say they had borrowed money to cover their electricity bills;
- 13% of those who have or live with someone who has a disability or illness had borrowed money to pay their electricity bills, compared to 5% who do not have or live with someone who has a disability or illness;
- Those who have children in their household (10%) were more likely than those without children (5%) to say they had borrowed money for their electricity bills;
- Respondents who have a prepayment meter for electricity (11%) were more likely to report borrowing money for their electricity bills than those on a credit meter (2%); and
- Over one quarter (28%) of respondents who had self-disconnected from their electricity supply said they had to borrow money to cover their electricity bills, compared to 4% who had not self-disconnected.

Figure 9.25 Borrowing money to pay electricity bills by demographics and location

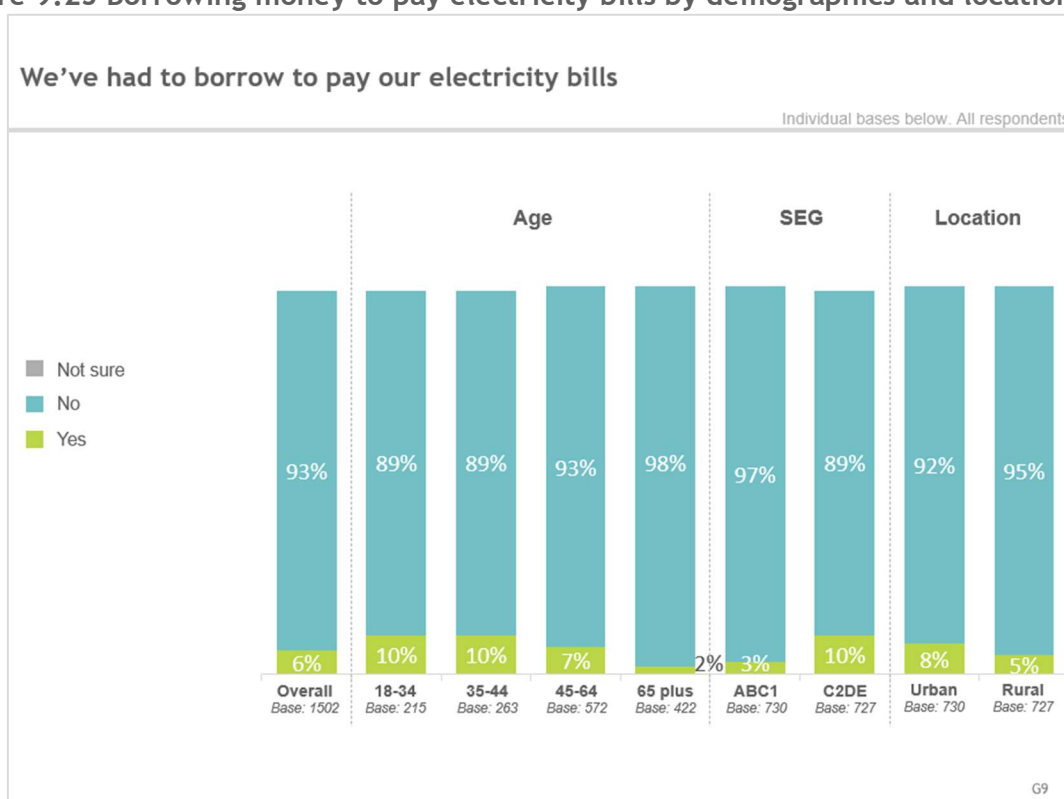


Figure 9.26 Borrowing money to pay electricity bills by tenure and deprivation

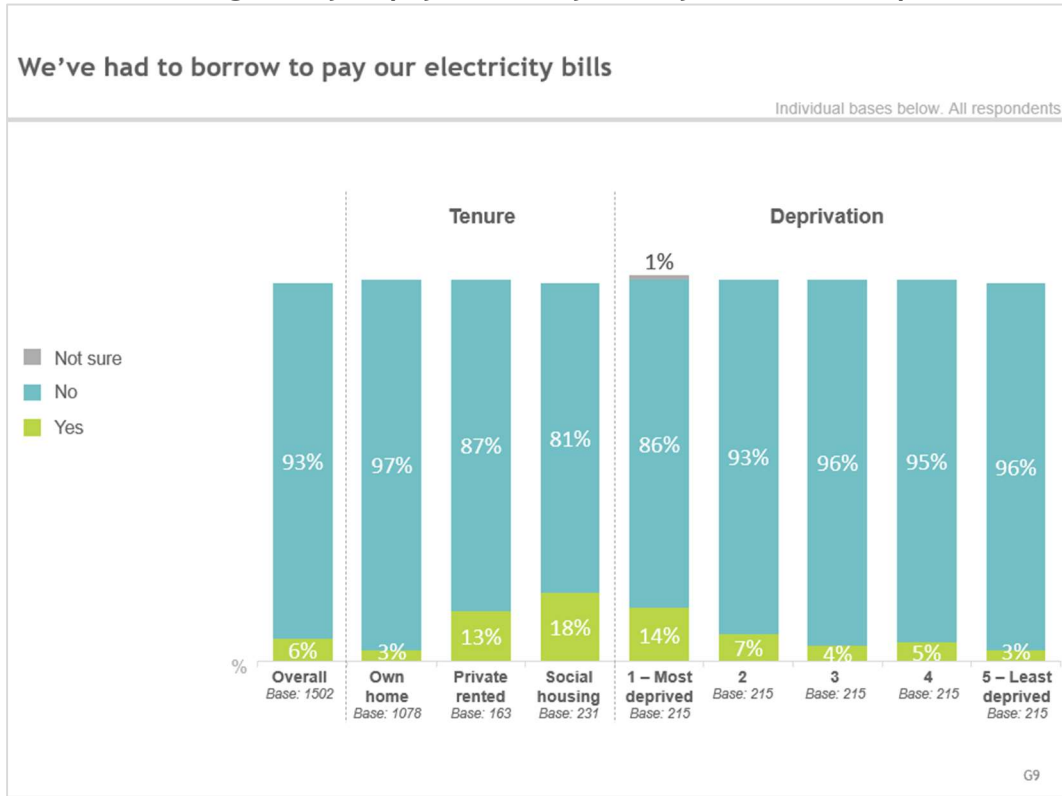
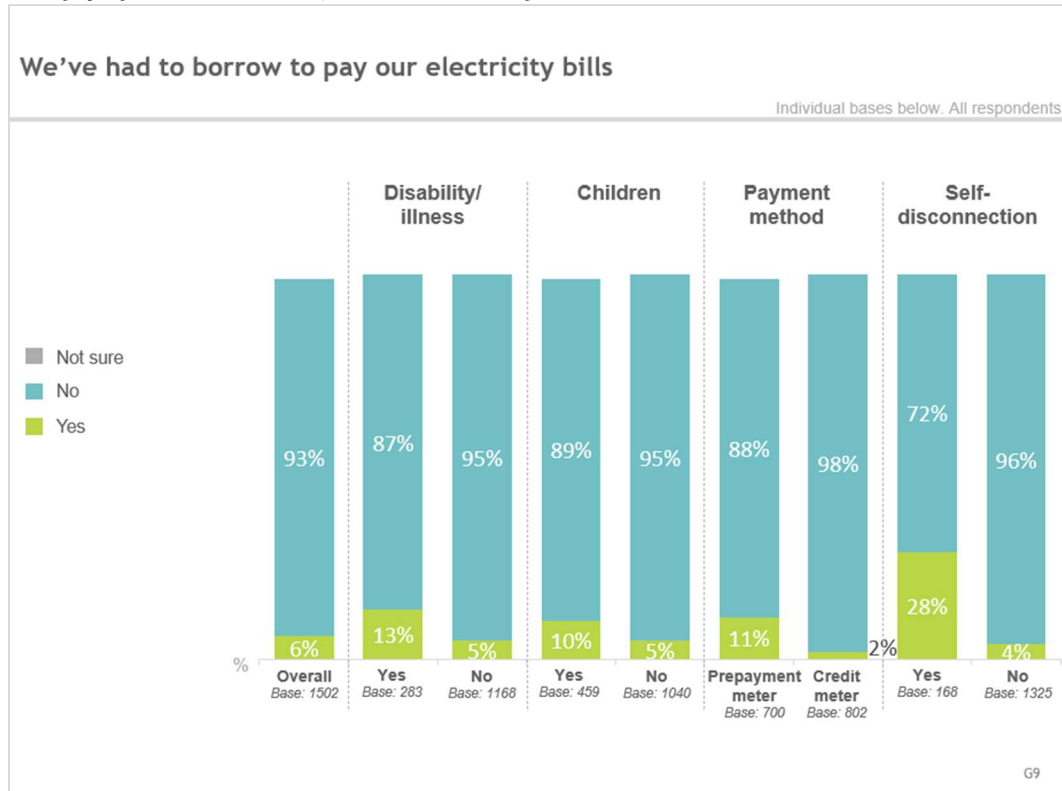


Figure 9.27 Borrowing money to pay electricity bills by disability/illness, children, electricity payment method, and electricity self-disconnection

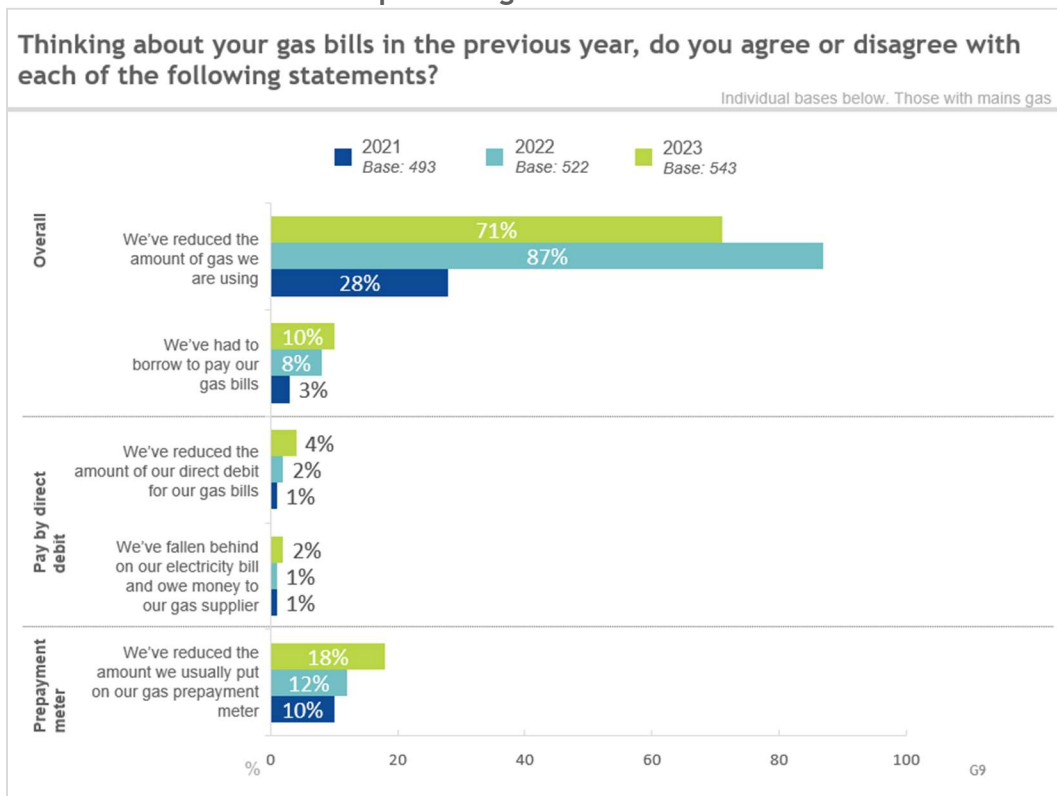


Gas

Those with gas were asked to confirm if the same set of statements applied to their situation over the last year (see Figure 9.28).

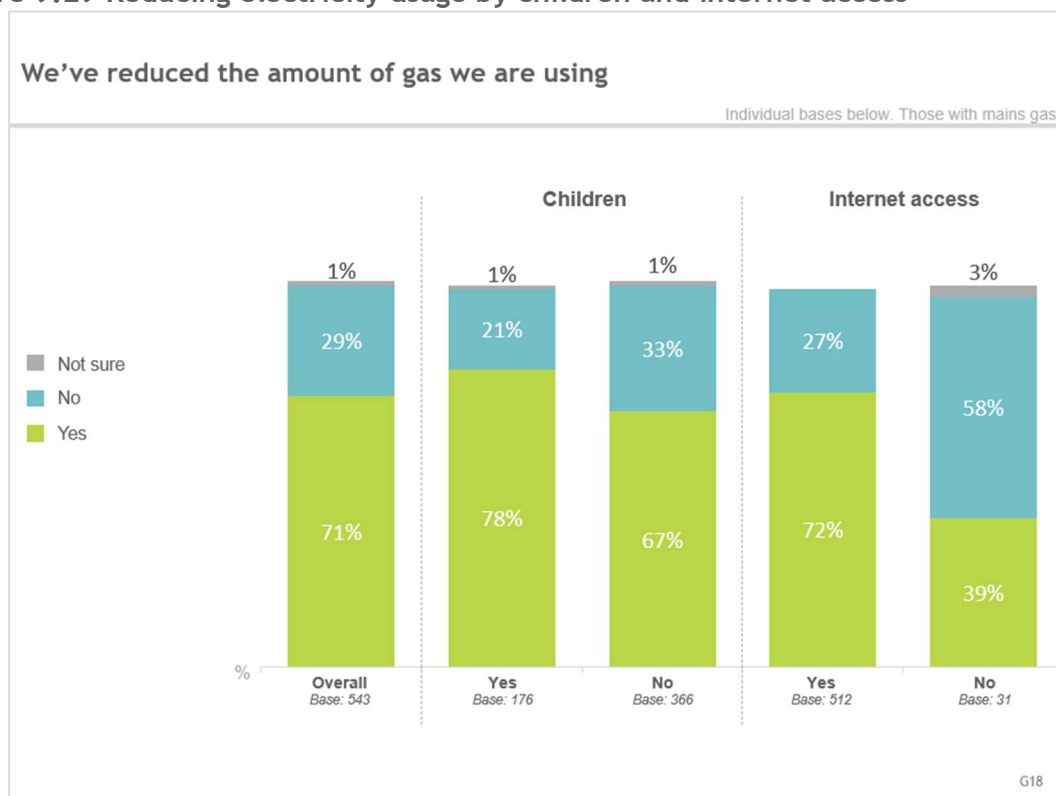
71% of gas customers stated that they had reduced the amount of gas they were using last year, compared to 87% who said they had done this in the 2022 Tracker. 10% reported that they had to borrow to cover their gas bills, up slightly from 8% in 2022. 4% of customers with direct debit for their gas bills said they have reduced the amount of direct debit on their bill, and a further 2% stated that they owe money to their supplier. 1% have asked their supplier for a bill payment holiday. 18% of those with a gas prepayment meter revealed that they have reduced the amount they usually put on their meter.

Figure 9.28 Methods to reduce spend on gas bill



Respondents who have children living in their household (78%) and who have access to the internet (72%) were more likely to report reducing their gas usage than those who do not have children (67%) and who do not have internet access (39%) (see Figure 9.29).

Figure 9.29 Reducing electricity usage by children and internet access



Subgroup analysis also revealed the following differences between those who had to borrow money to pay for their gas bills (see Figures 3.30 to 3.32):

- Respondents aged 18 to 34 (14%), 35 to 44 (17%), and 45 to 64 (11%) were more likely to have said they borrowed money to pay their gas bills than those aged 65 and over (1%);
- Those in the C2DE group (15%) were more likely than those in the ABC1 group (5%) to say they had borrowed money for their gas bills;
- 16% of those living in the most deprived areas said they had to borrow money to pay their gas bills, compared to 7% living in the least deprived areas;
- Those who privately rent (20%) and who live in social housing (18%) were more likely to state that they had borrowed money than those who own their home (4%);
- Respondents who have or live with someone who has a disability or illness (17%) were more likely to have borrowed money than those who do not have someone with a disability or illness in their household (9%); and
- 16% of respondents who have children in their household reported having to borrow money to pay their gas bills, compared to 7% without children.

Figure 9.30 Borrowing money to pay gas bills by demographics

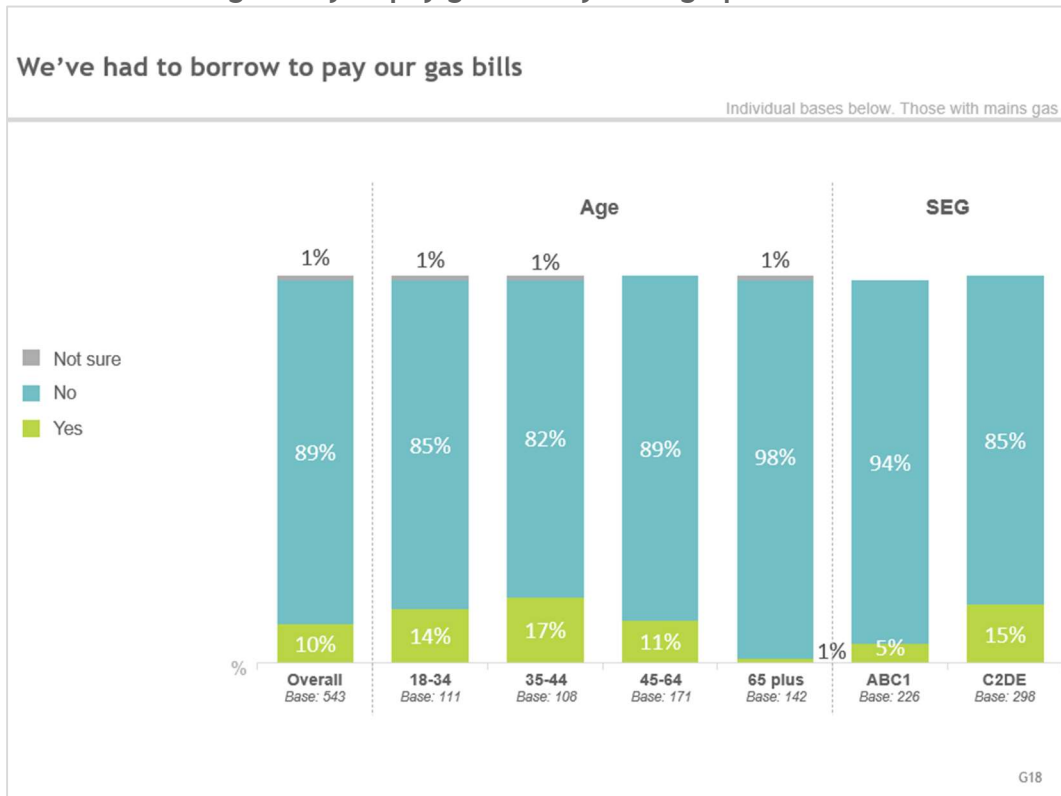


Figure 9.31 Borrowing money to pay gas bills by deprivation and tenure

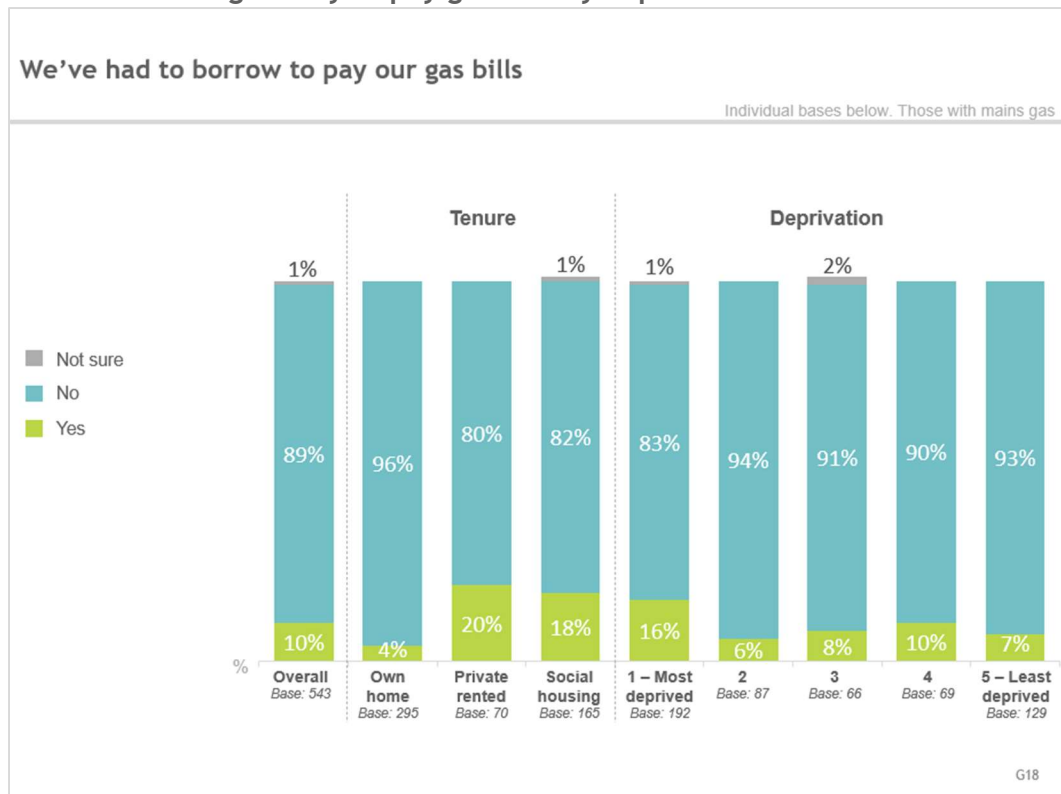
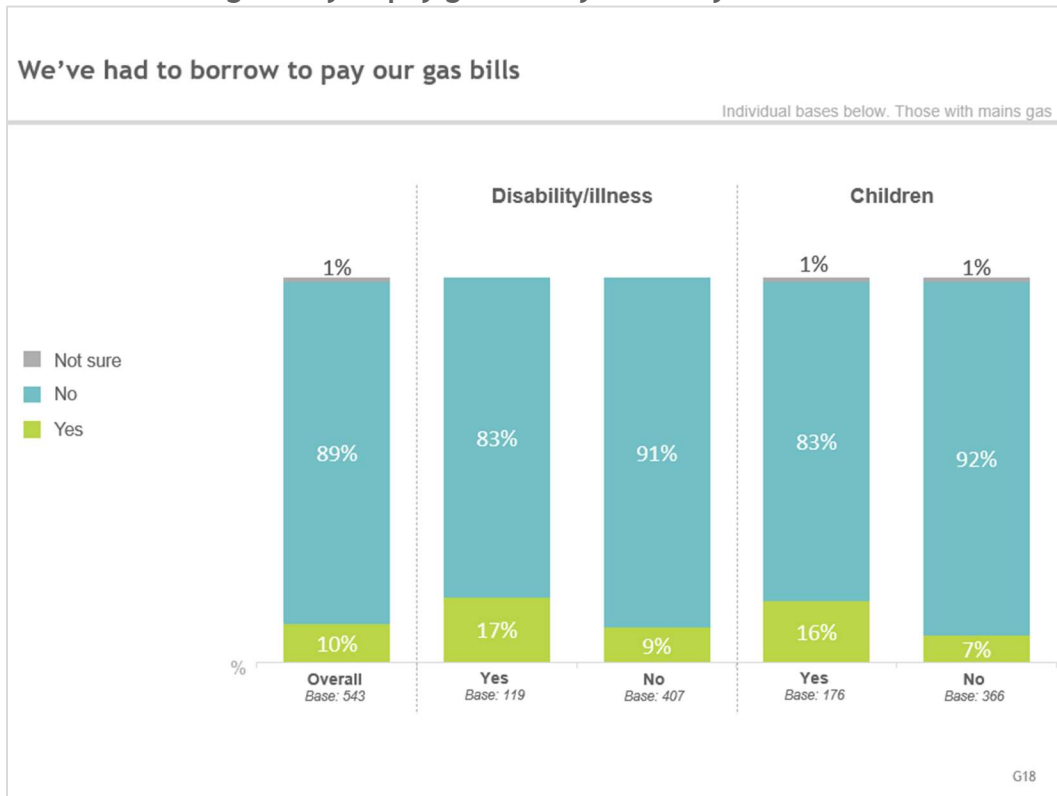


Figure 9.32 Borrowing money to pay gas bills by disability/illness and children



Percentages cited in this report were calculated using unrounded figures then rounded to the nearest whole percent. Percentages for categories in the charts therefore may not sum to 100% due to rounding. Percentages cited that combine multiple response categories may not be equal to the sum of the rounded percentages for these categories.

10. Consumer protections

In this section we determine the level of awareness of the obligations that energy suppliers have to protect domestic consumers, and if consumers know how to make a complaint when these obligations are not met.

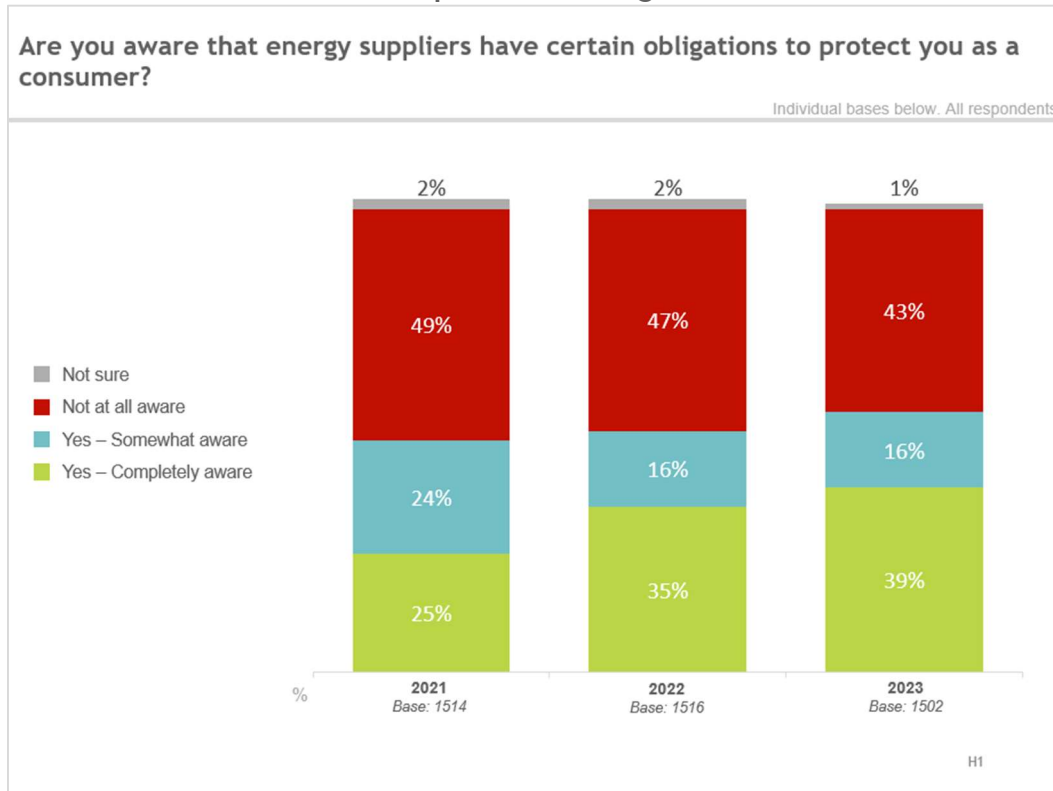
Key findings

- Over half (55%) of respondents were aware that energy suppliers have obligations to protect them. This represents an increase from 51% in 2022. 43% were not at all aware of these obligations.
- Four in five (80%) respondents who were aware of these obligations said that they would know how to make a complaint if their energy supplier was not meeting these obligations, compared to 68% in 2022.

Over half (55%) of domestic consumers were aware that their energy supplier has an obligation to protect them as a consumer, including two in five (39%) who were completely aware of this. However, 43% were not aware of the obligation.

Both electricity (48%) and gas (49%) customers who have a prepayment meter were more likely to not be aware of these obligations than those with a credit meter for electricity (39%) and gas (40%).

Figure 10.1 Awareness of consumer protection obligations



Level of awareness also differed significantly between various subgroups (see Figures 10.2 to 10.5):

- Over three in five (62%) of those in the ABC1 group said they were aware of these obligations, compared to half (50%) of those in the C2DE group;
- Respondents who own their home (58%) were more likely to say they were aware than those who live in social housing (51%) and who privately rent (47%);
- Those who have children (48%) were more likely to report they were not aware of these obligations than those who do not have children in their household (41%);
- 57% of respondents who have access to the internet and three in five (60%) who consider themselves to be confident internet users said they were aware of supplier's obligations. This compares to 37% and 44% respectively of those who do not have internet access and who do consider themselves to be confident internet users;
- Both those respondents who have a prepayment meter for electricity (48%) and for gas (49%) were more likely to say they were unaware than those with credit meters for electricity (39%) and gas (40%); and
- Respondents who have self-disconnected from their electricity supply (57%) were more likely to state they were unaware of supplier obligations than those who have not self-disconnected (42%). This was also the case for gas customers who had self-disconnected (66%, compared to 42% who had not self-disconnected).

Figure 10.2 Awareness of consumer protection obligations by demographics, tenure, and children

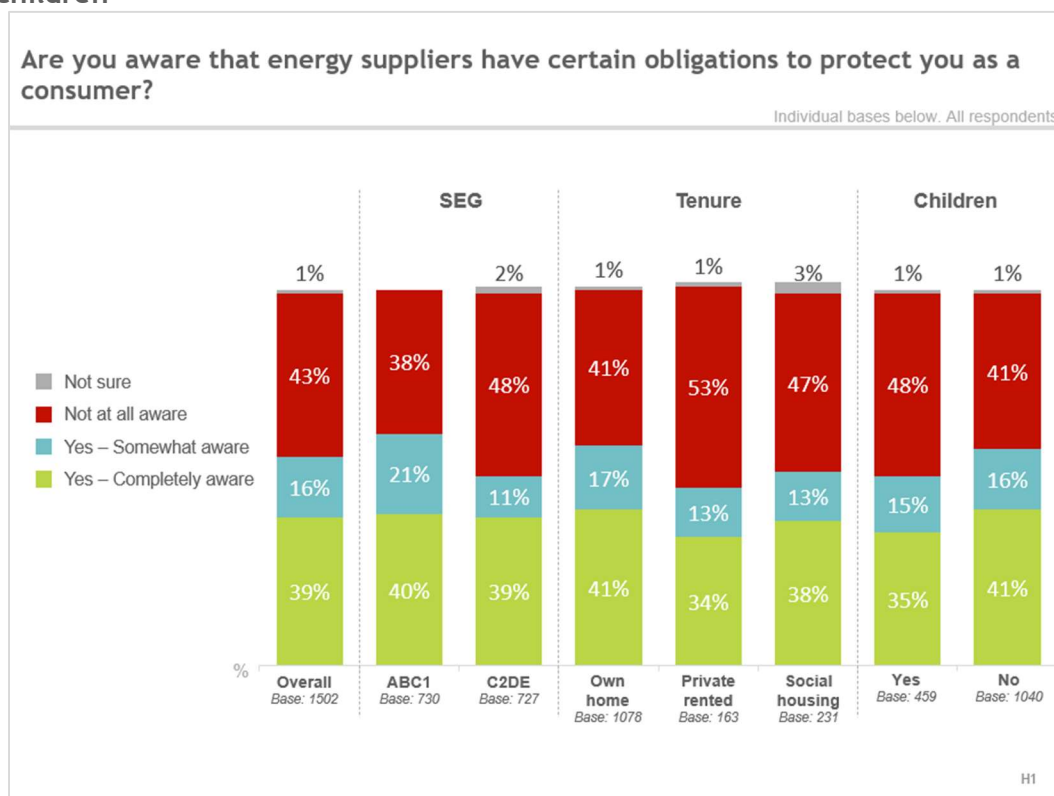


Figure 10.3 Awareness of consumer protection obligations by internet access and confidence using the internet

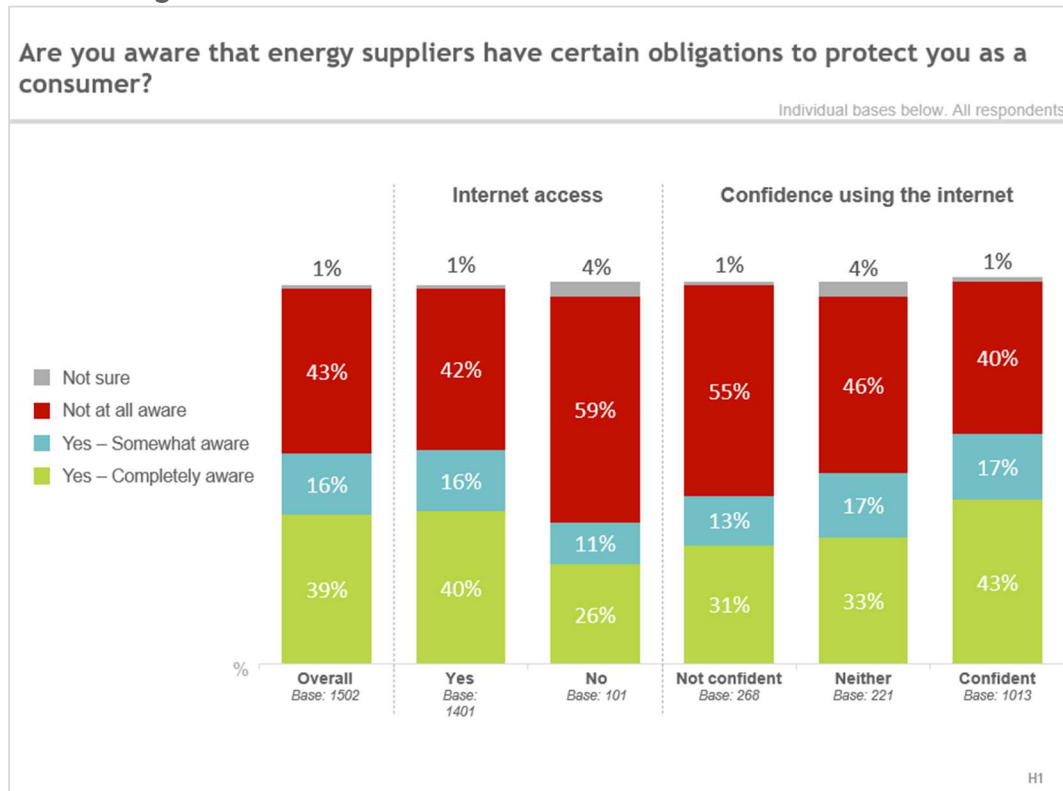


Figure 10.4 Awareness of consumer protection obligations by electricity payment method and electricity self-disconnection

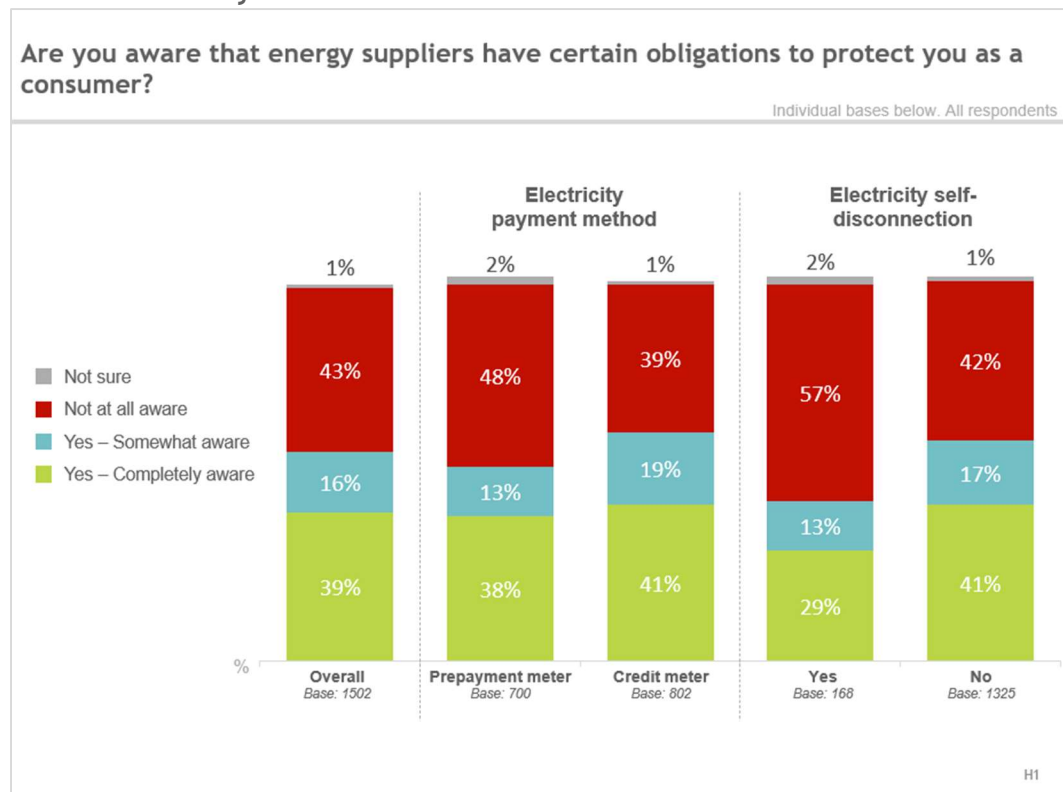
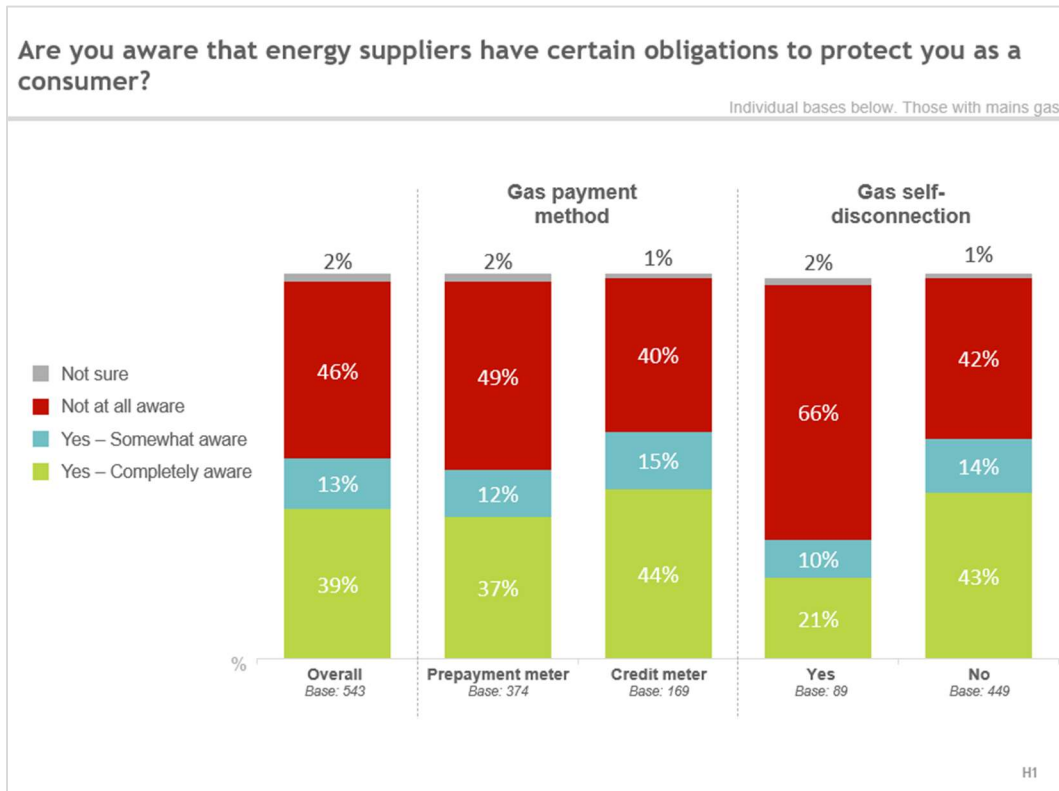
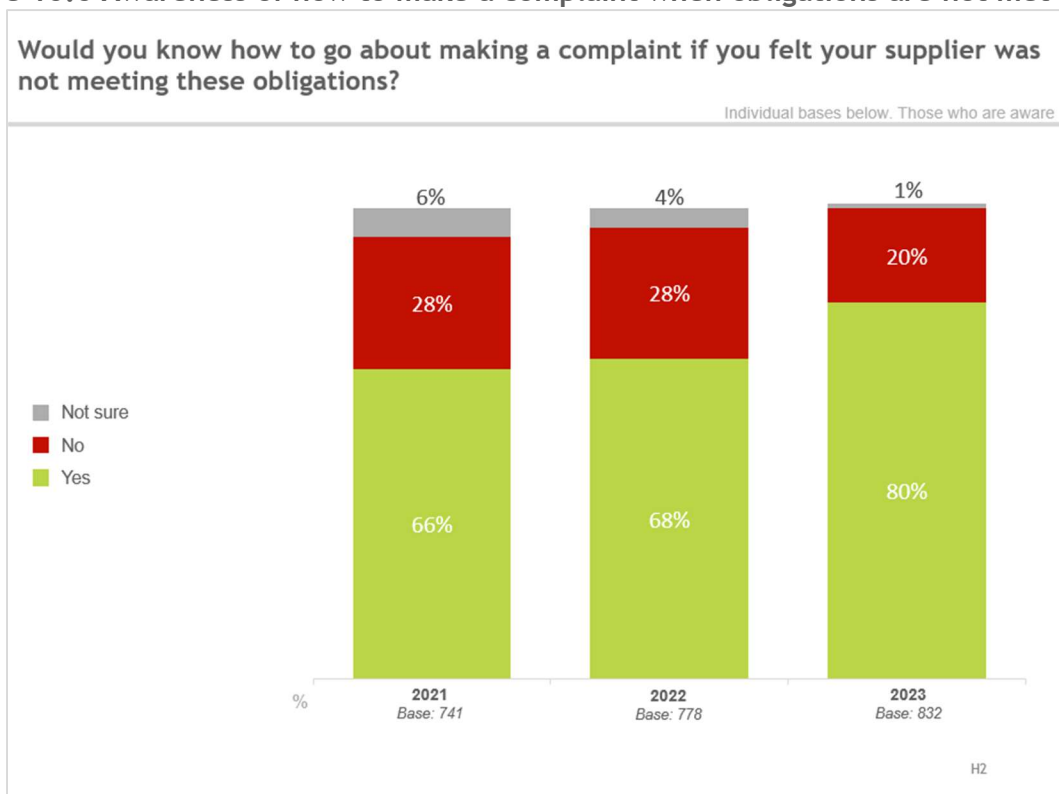


Figure 10.5 Awareness of consumer protection obligations by gas payment method and gas self-disconnection



Of those who were aware, four in five (80%) stated that they would know how to make a complaint if they felt their supplier was not meeting these obligations (see Figure 10.6).

Figure 10.6 Awareness of how to make a complaint when obligations are not met



Respondents who consider themselves to be confident internet users (82%) were more likely to say they would be aware of how to make a complaint than those who are not confident users (73%).

Table 10.2 Awareness of how to make a complaint when obligations are not met by internet use

		Yes	No	Not sure	Total
Overall	All <i>Base: 832</i>	80%	20%	1%	100%
Internet confidence	Not confident <i>Base: 117</i>	73%	25%	3%	100%
	Neither <i>Base: 111</i>	72%	27%	1%	100%
	Confident <i>Base: 604</i>	82%	17%	0%	100%

Percentages cited in this report were calculated using unrounded figures then rounded to the nearest whole percent. Percentages for categories in the charts therefore may not sum to 100% due to rounding. Percentages cited that combine multiple response categories may not be equal to the sum of the rounded percentages for these categories.

11. Support services

In this section we examine the support services offered by energy suppliers and NI Water in terms of the following:

- Awareness of support services;
- Use of support services; and
- Satisfaction with support services;

Key findings

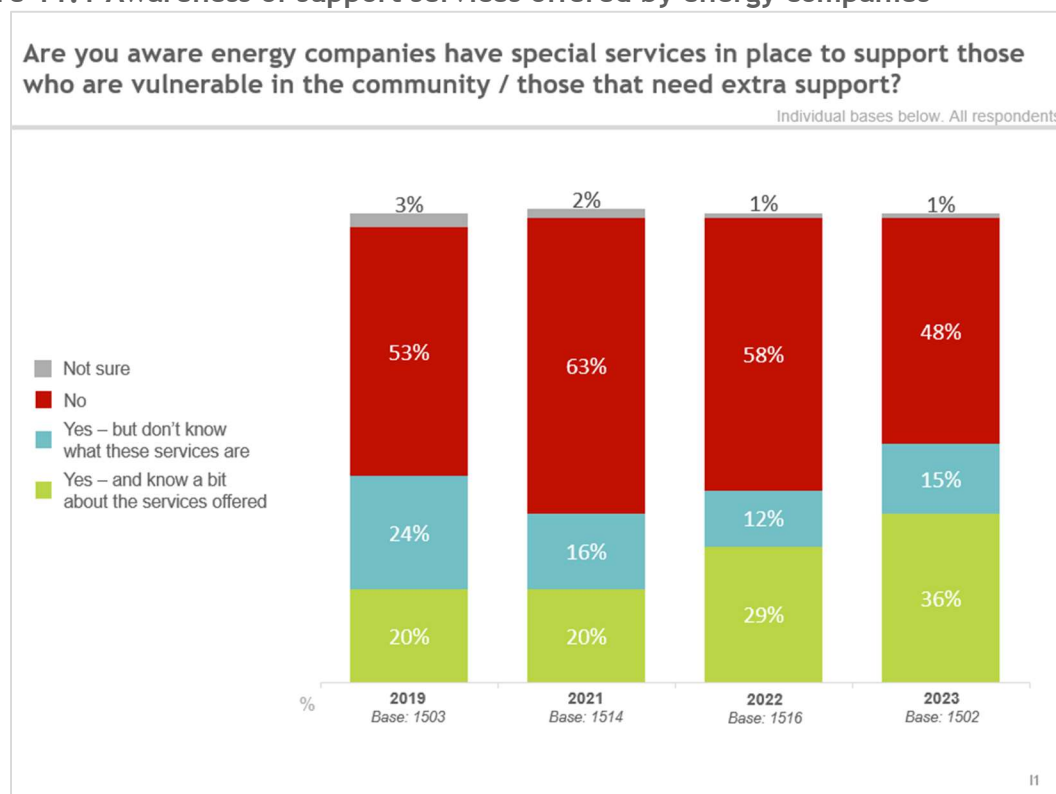
- 48% of respondents were not aware of the special services offered by energy companies to consumers who are vulnerable or who require extra support. This compares to 58% who were not aware of these services in 2022.
- 3% were signed up to or had utilised some of the support service offered by energy companies.
- The majority (96%) of those in the high or medium vulnerability group had not signed up to utilise any of the support services offered by energy companies. 93% who have or live with someone who has a disability or illness also had not signed up for any of these support services.
- One third (32%) were aware of the services for vulnerable consumers that NI Water provides, an increase from 18%.

Energy companies

Awareness of support offered by energy companies

Half (51%) of respondents indicated that they were aware that energy companies have support services for vulnerable customers, with 36% knowing something about what type of services are offered. However, 48% were not aware that support is available. The percentage who say they are aware to some extent has risen from 41% in 2022 to 51% in 2023. Respondents who have or live with someone who has a disability or illness (54%) and those who would be considered to be in the high or medium vulnerability group (52%) were more likely to say they were unaware of these support services than those who do not have someone with a disability or illness in their household (46%) and who are not vulnerable (43%) (see Figure 11.1)

Figure 11.1 Awareness of support services offered by energy companies



Other sub-groups who were significantly more likely to not be aware of support services included (see Figures 11.2 to 11.6):

- Over half (52%) of those in the C2DE group were unaware, compared to over two in five (42%) of those in the ABC1 group;
- Respondents living in the most deprived areas (51%) were more likely to be unaware compared to those in the least deprived areas (39%);
- Those who privately rent (58%) were more likely than those who own their home (46%) to be unaware of these services;
- 53% of respondents who have children in their household stated that they were unaware, compared to 46% who do not have children in their household;
- Respondents who do not have access to the internet (67%) and who do not consider themselves to be confident internet users (63%) were more likely to say they were unaware of the support services than those who have internet access (46%) and who are confident internet users (43%);

- Half (50%) of the respondents who had not switched electricity supplier in the last three years said that they were unaware of the support services, compared to over two in five (43%) of those who had switched; and
- Those respondents who had self-disconnected from their electricity supply (63%) and from their gas supply (71%) were more likely to say they were unaware of the support services than those who had not self-disconnected (46% for electricity, and 42% for gas customers).
- Those who have a prepayment meter for electricity (52%) and for gas (51%) were more likely to report they were unaware of these services than those who have a credit meter (45% for electricity, and 36% for gas);

Figure 11.2 Awareness of support services offered by energy companies by demographics, deprivation and tenure

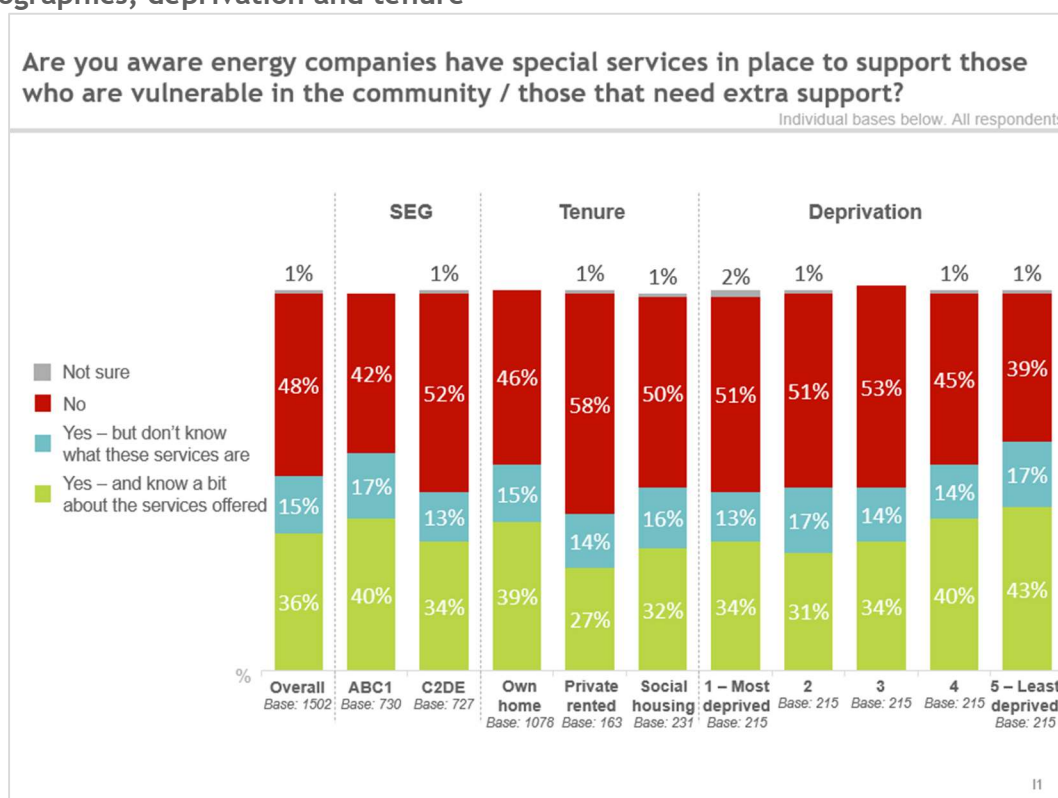


Figure 11.3 Awareness of support services offered by energy companies by disability, children, and vulnerability

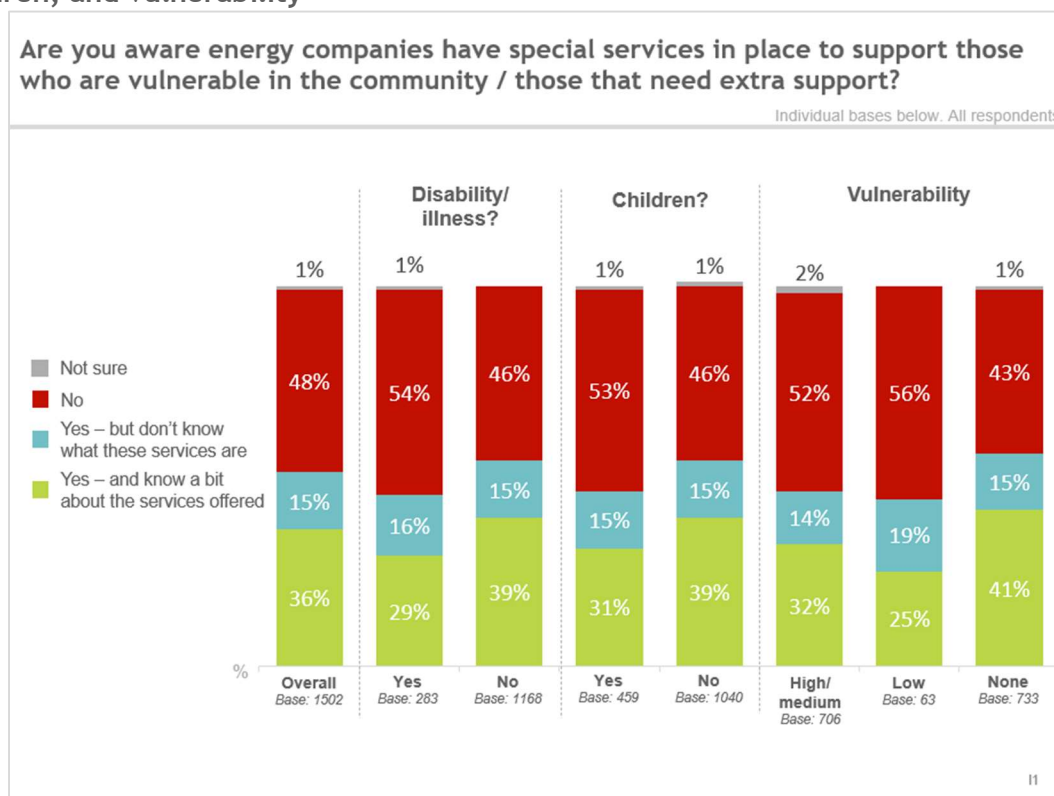


Figure 11.4 Awareness of support services offered by energy companies by internet access and confidence using the internet

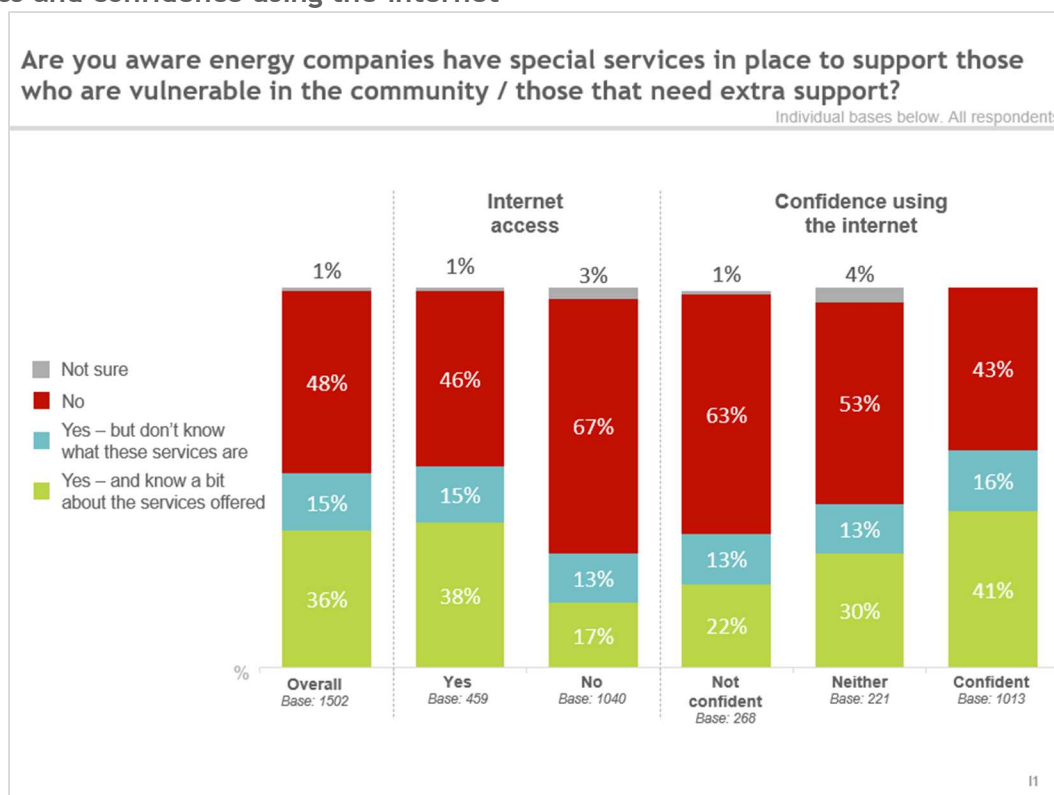


Figure 11.5 Awareness of support services offered by energy companies by electricity payment method, switching and self-disconnection

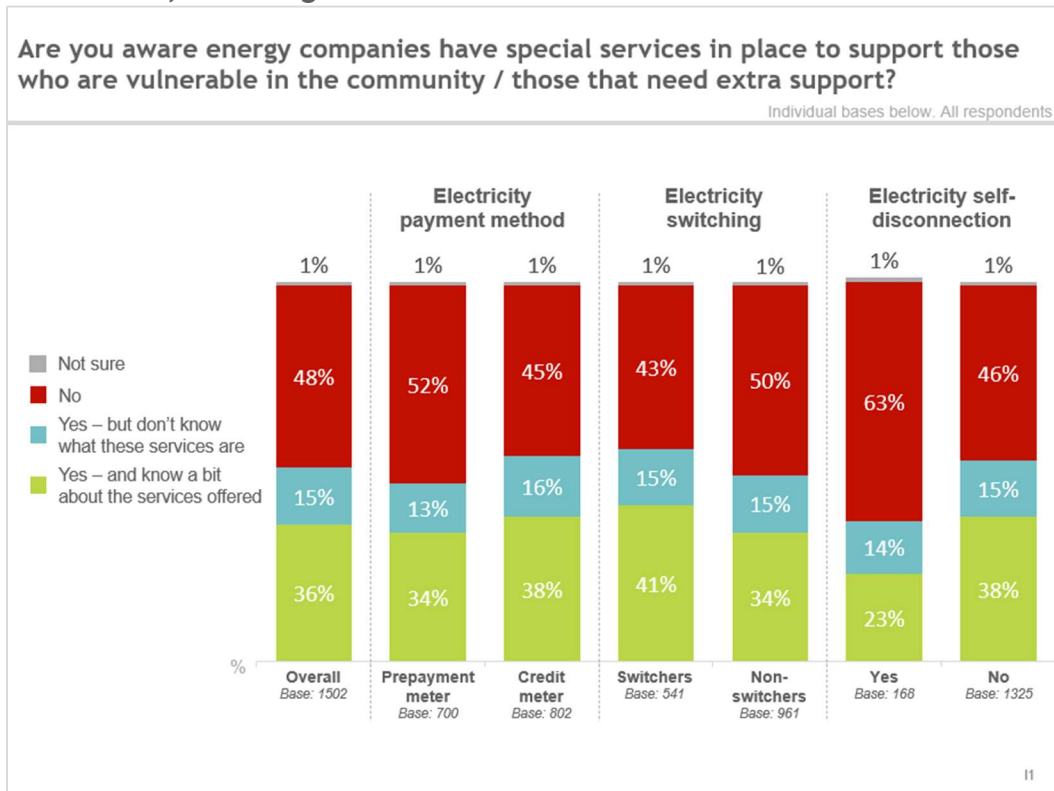
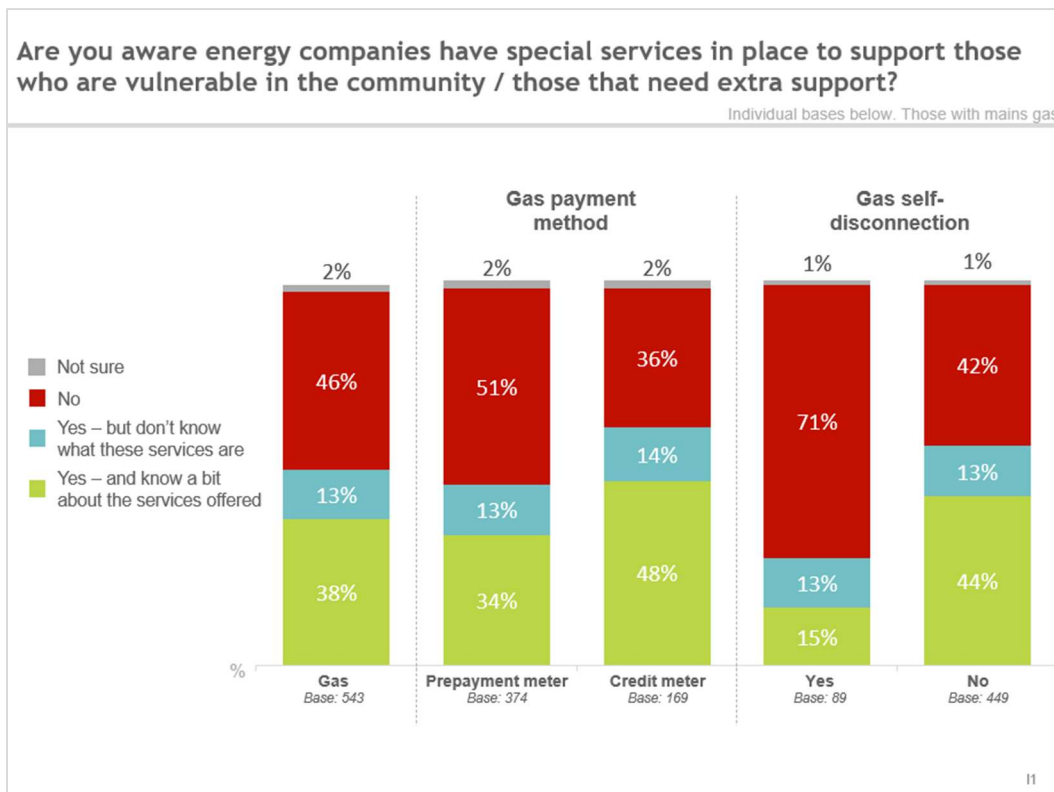


Figure 11.6 Awareness of support services offered by energy companies by gas payment method and self-disconnection



Use of support offered by energy companies

Respondents were asked whether or not they had used any of the following support services:

- **NIE Networks' Critical Care Register** for consumers who are medically dependent on electricity to operate equipment in their home;
- Their supplier's **Customer Care Register** which prioritises consumers on the register during service problems and allows access to additional free services;
- A **large print bill** for consumers with visual problems; and
- The **Password Scheme** which allows consumers to register a password that their supplier will use if they call.

The vast majority (97%) of domestic consumers had not used any of the support services. 2% were signed up to NIE Networks' Critical Care Register, and 1% were signed up to their supplier's Customer Care Register. Four requested a large print bill, while none had been included in the Password Scheme. 96% of those considered to be vulnerable had not signed up for any of the support services, while 93% of those who have or live with someone who has a disability or illness had not signed up.

32 of the 36 respondents identified as being dependent on electricity for medical equipment said that they were not signed up to the Critical Care Register, with 97% of those considered to be of high or medium vulnerability not signed up. Similarly, almost all (99%) of those in high or medium vulnerability groups had not signed up for their supplier's Customer Care Register.

Figure 11.7 Use of support services offered by energy companies

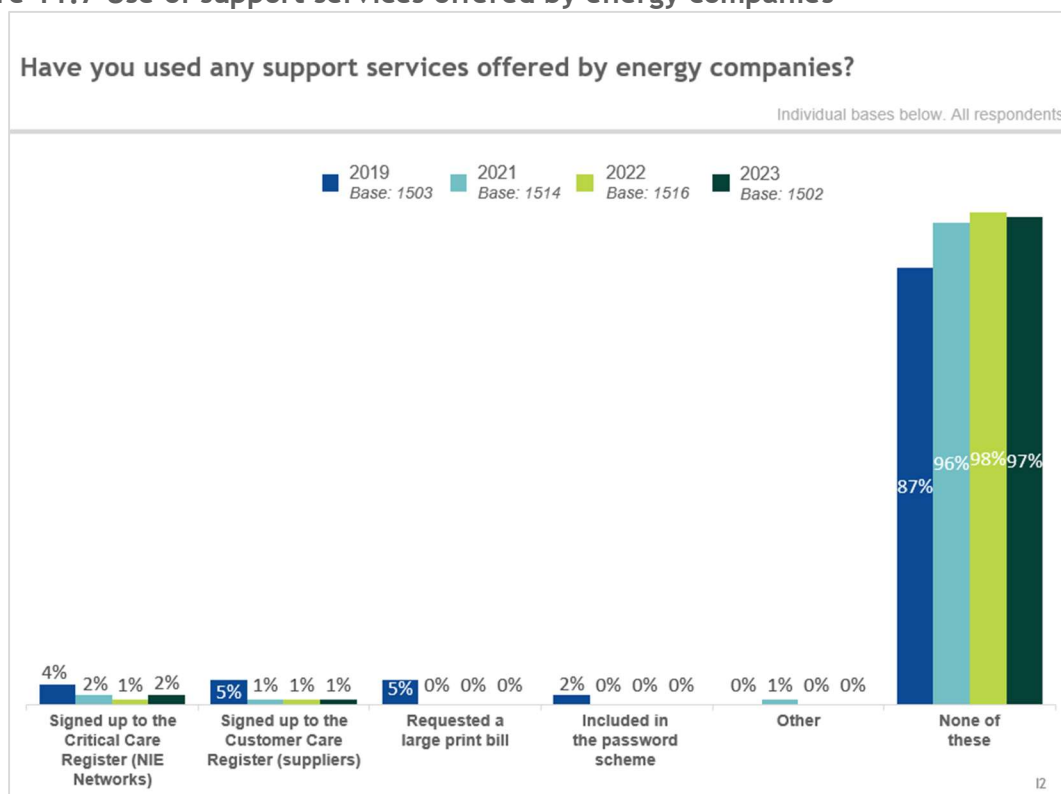


Table 11.1 Use of support services offered by energy companies by vulnerability

	Vulnerability				Disability/illness	
	Overall Base: 1502	High/medium vulnerability Base: 706	Low vulnerability Base: 63	Not vulnerable Base: 733	Yes Base: 283	No Base: 733
Signed up to the Critical Care Register	2%	3%	-	0%	5%	1%
Signed up to the customer care register	1%	1%	-	1%	3%	1%
Requested a large print bill	0%	1%	-	-	1%	0%
Included in the Password Scheme	-	-	-	-	-	-
None of these	97%	96%	100%	99%	93%	98%

As demonstrated in the 2021 and 2022 Domestic Trackers, the low awareness and take-up of these support services amongst vulnerable consumers may be due to their access to and confidence in using the internet (see Table 11.1). 9% of respondents considered to be in the high or medium vulnerability group reported that they did not have access to the internet, whereas all those in the low vulnerability group (100%) and the majority who are not vulnerable (95%) said they have access. Similarly, one fifth (21%) high or medium vulnerable consumers stated they were not confident internet users, compared to 8% and 16% of low vulnerable and non-vulnerable respondents respectively.

Age, SEG, deprivation and tenure were also indicators of internet access and use. Respondents aged 65 and over (85%) were the least likely group to say they had access to the internet, while being most likely to say they were not confident internet users (33%). Respondents in the ABC1 group were more likely to have internet access (96%) and to be confident users (78%) than those in the C2DE group (91% and 58% respectively). 97% of those living in the least deprived areas had access to the internet, compared with 92% in the most deprived areas, with those in the least deprived areas also more likely to report being confident users (72%, compared to 57% in the most deprived areas). Respondents who own their home (95%) and who privately rent (96%) were more likely to have internet access than those living in social housing (87%).

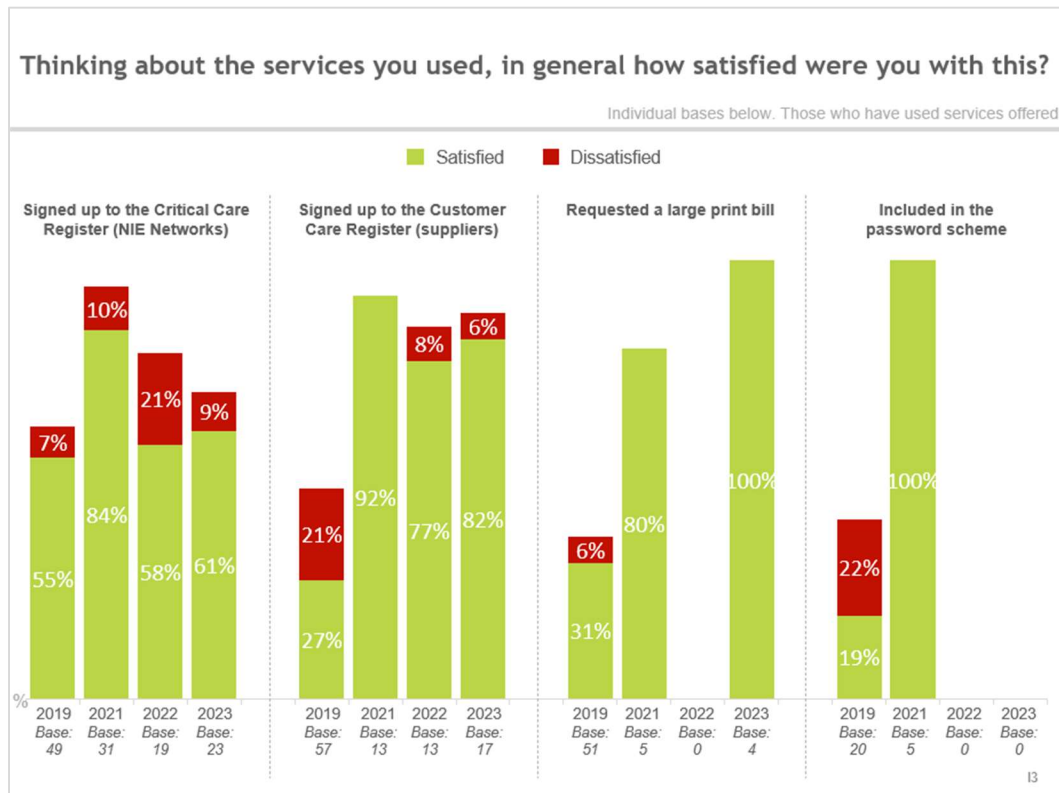
Table 11.2 Internet access and confidence using the internet by age, deprivation and vulnerability

		Internet access		Confidence using internet		
		Yes	No	Not confident	Neither	Confident
Overall	All Base: 1502	93%	7%	18%	15%	67%
Age	Under 35 Base: 257	98%	2%	4%	4%	92%
	35-44 Base: 317	98%	2%	7%	10%	83%
	45-64 Base: 548	95%	5%	17%	16%	67%
	65 plus Base: 376	85%	15%	33%	22%	46%
SEG	ABC1 Base: 730	96%	4%	9%	13%	78%
	C2DE Base: 727	91%	9%	26%	16%	58%
MDM Quintile	1 – Most deprived Base: 286	92%	8%	21%	16%	57%
	2 Base: 299	93%	7%	17%	15%	68%
	3 Base: 310	92%	8%	21%	13%	46%
	4 Base: 310	92%	8%	18%	13%	68%
	5 – Least deprived Base: 297	97%	3%	12%	16%	72%
Tenure	Own home Base: 1078	95%	5%	17%	14%	69%
	Private rented Base: 163	96%	4%	13%	10%	78%
	Social housing Base: 231	87%	13%	23%	18%	58%
Vulnerability	High/ medium vulnerability Base: 706	91%	9%	21%	15%	64%
	Low vulnerability Base: 63	100%	-	8%	10%	82%
	Not vulnerable Base: 733	95%	5%	16%	15%	70%

Satisfaction with support offered by energy companies

28 of the 39 domestic consumers who had used at least one of the support services said they were 'satisfied' or 'very satisfied' with the service. 14 of the 23 respondents who signed up to NIE Networks' Critical Customer Care Register reported satisfaction with the service, and 14 of the 17 who signed up to their suppliers Customer Care Register reported the same (see Figure 11.3).

Figure 11.8 Satisfaction with support services offered by energy companies N.B. Low bases*



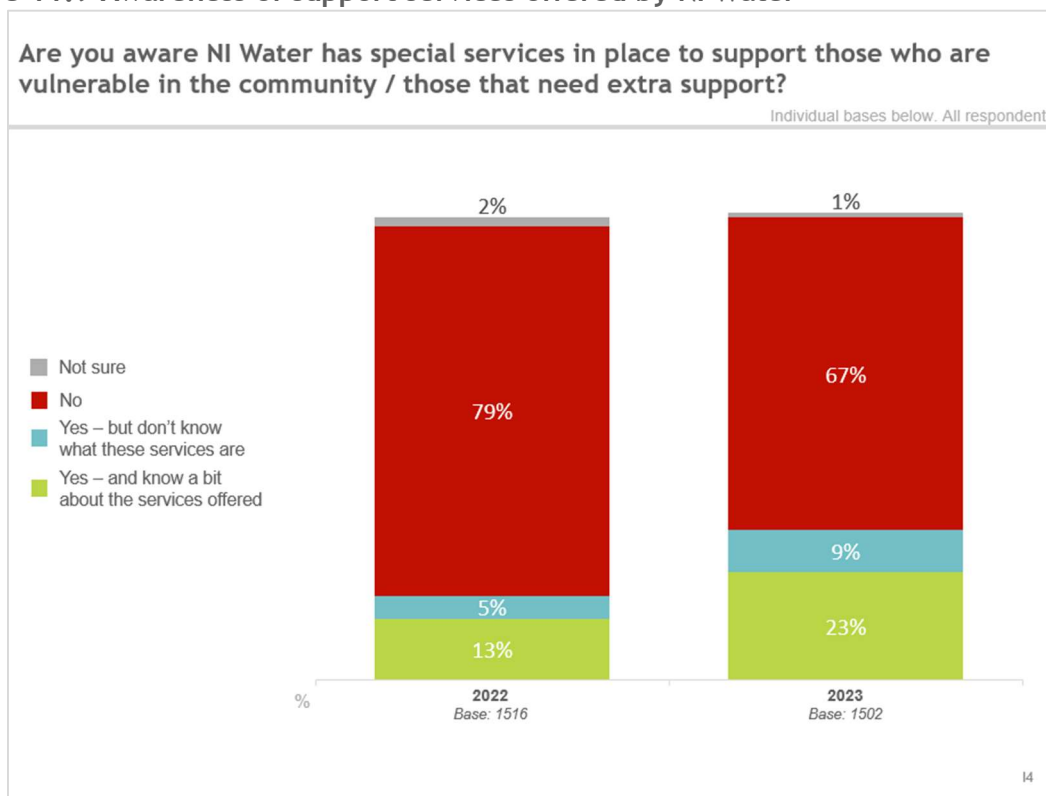
*Due to small sample sizes these findings are not generalisable.

NI Water

Awareness of support services offered by NI Water

One third (32%) of domestic consumers were aware that NI Water offered support services for vulnerable customers, including almost one quarter (23%) who knew a bit about the services offered. This has increased since 2022, when 18% indicated that they were aware of the support services (see Figure 11.9).

Figure 11.9 Awareness of support services offered by NI Water



Respondents in the high and medium vulnerability group (70%) and who have or live with someone who has a disability or illness (75%) were more likely to be unaware of these services than those who are not vulnerable (63%) and who do not have or live with someone who has a disability or illness (65%). Subgroup analysis revealed that certain groups were also more likely to not be aware of the services offered by NI Water (see Figures 11.10 and 11.11):

- 70% of those in the C2DE group, compared to 63% in the ABC1 group;
- 71% of those who have children in their household, compared to 65% without children; and
- 80% of those who do not consider themselves to be confident internet users, compared to 62% of confident users.

Figure 11.10 Awareness of support services offered by NI Water by disability/illness, children and vulnerability

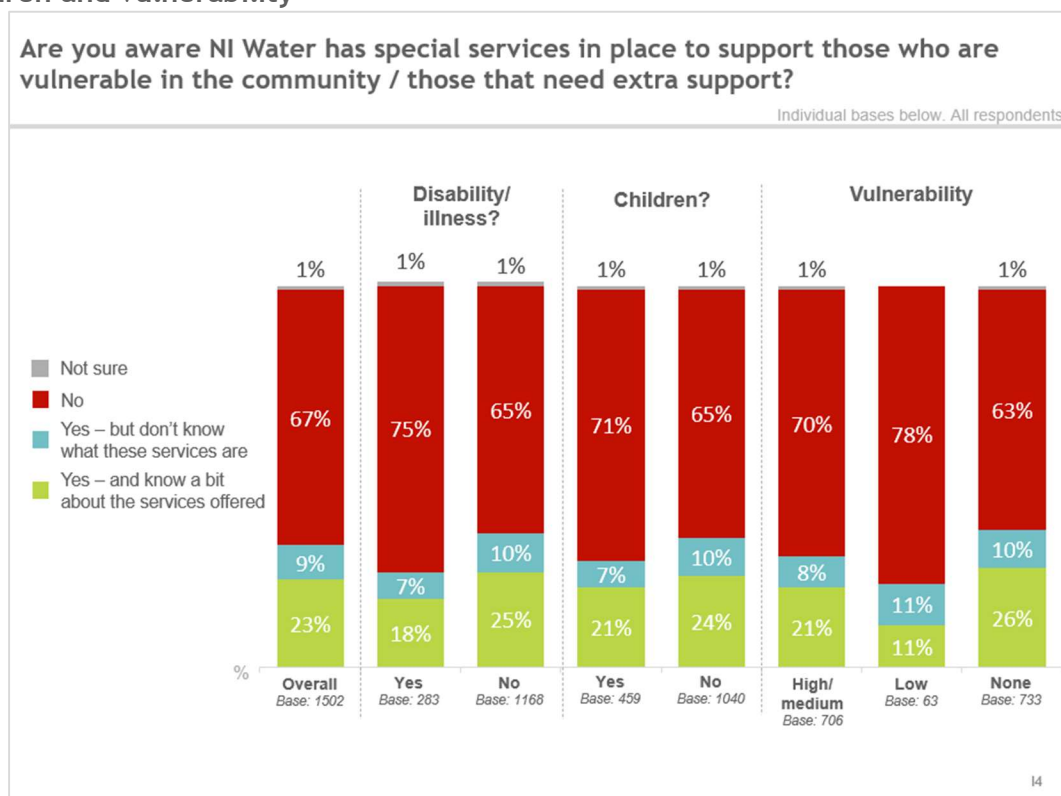
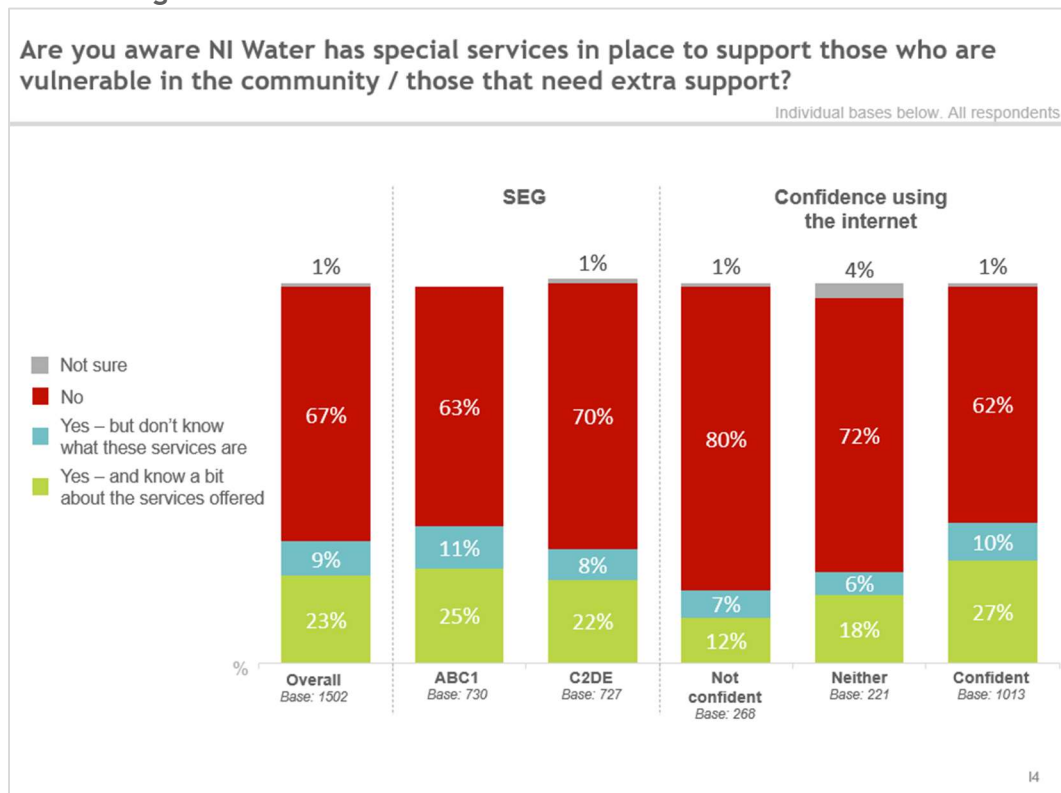


Figure 11.11 Awareness of support services offered by NI Water by demographics and confidence using the Internet



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12. Conclusions and areas for consideration

The follow paragraphs outline a number of overarching trends within the data and areas which the Utility Regulator may wish to explore further in order to improve outcomes when the survey is repeated in the future.

Energy costs remain high but stable

The amount that domestic consumers report spending on their electricity and heating has remained consistent with the 2022 findings following a steep increase from the 2021 Tracker. In 2021, 13% of respondents paid £100 or more per month for their electricity, with this rising to 43% in both 2022 and 2023. The 2023 Tracker did however see an increase in the proportion of respondents spending £150 or more per month from 12% in 2022 to 16%. In terms of the amount spent on heating, the proportion of respondents paying at least £100 per month has fallen from 44% in 2022 to 41% (although this is significantly higher than the 12% observed in the 2021 Tracker), while those that are unsure has remained consistent at 21% (compared to 22% in 2022). For gas customers, the proportion of respondents spending £100 or more has decreased from 48% in 2022 to 42% in 2023, however this remains high when compared to 9% in 2021.

The proportion of domestic consumers that 'sometimes', 'often', or 'always' struggle to pay their electricity bills has fallen since 2022. 37% reported they have struggled to keep on top of their electricity bills over the past 12 months, compared to 43% in 2022. However, the proportion that struggled to keep on top of their gas bill has remained consistent with the previous tracker, with 41% reporting they that 'sometimes', 'often', or 'always' struggle to pay their gas bills, compared to 40% in 2022. It should be noted that the proportion of consumers that were 'always' able to keep on top of their electricity bills has increased from 56% to 63%, which may explain why fewer domestic consumers reported having to reduce their electricity usage (85% in 2022, compared to 71% in 2023). While the proportion of gas consumers that are 'always' able to pay for their bill has remained similar to the previous tracker, there were also fewer respondents that reported having to reduce their gas usage (87% in 2022, compared to 71% in 2023).

Following on from the 2021 and 2022 Trackers there has been a further reduction in support amongst domestic consumers to pay extra on their bill for projects to protect the environment, for providing extra help for vulnerable consumers, and for improving the reliability of the network. This suggests that domestic consumers may struggle to cope with any further increases in their energy bills.

With the incidence of customers self-disconnecting from their energy supply, delaying getting other essentials to pay for energy, and borrowing money to pay energy bills remaining consistent with the 2022 Tracker, it would appear that while most domestic consumers have been able to adapt to higher energy costs, there is a section of customers for whom energy remains unaffordable.

35 to 44 year olds struggling most with rising costs

Respondents aged 35 to 44 were the age group who were most likely to spend at least £100 on their electricity (55%) and on their heating (51%). This may explain why this age group are more likely to struggle with keeping on top of their bills. 47% of respondents in this age group reported that they 'sometimes', 'often' or 'always' struggled to stay on top of their electricity bills over the past 12 months, while half (50%) said this about their gas bills. Respondents aged 35 to 44 were also more likely to have gone without or delayed getting other essentials to pay for their electricity and were joint most likely with those aged under 35 to say they had borrowed money to pay their electricity bills. The findings also suggest those aged 35 to 44 were more likely to have more negative experiences with their energy supplier, with this age group the most likely to: distrust their electricity and gas supplier to treat them fairly and to give them a fair price; to be dissatisfied with the overall service they receive from their gas supplier; and to be not confident that they are on the best electricity or gas deal available.

With 35 to 44 year olds appearing to struggle more with their energy bills and to have had more negative experiences with their energy supplier, there is evidence to suggest they take a more proactive approach to ensuring they are on the best deal for them. Respondents in this age group were among the most likely to have switched their electricity supplier at least four times and to say they were likely or very likely to switch supplier again in the next 12 months. However, while respondents in this age group were most likely to recall in what form they receive correspondence from their electricity supplier, they were also the most likely to report not reading or opening this correspondence.

Most deprived areas have similar energy spend to least deprived areas, but are more likely to show signs of struggling

As seen in the 2022 Tracker, there was little difference in electricity spend between respondents living in the most deprived areas and those living in the least deprived areas (although those in the most deprived areas were less likely to spend £100 or more per month on heating). Despite this, those in the most deprived areas were more likely to: sometimes struggle to pay their electricity bill; have to delay or go without getting essentials to pay for electricity; and borrow money to pay for their electricity and gas bill.

These findings are concerning due to the lack of engagement exhibited by consumers living in these areas, with those in the most deprived areas also more likely to: be unsure about what form they receive correspondence from their energy supplier; and more likely to say they never receive any correspondence or report reading the correspondence. This lack of engagement was also evident in their approach to switching energy supplier. Respondents living in the most deprived areas who had switched electricity supplier were more likely to have done so after being approached by a doorstep seller, while those who had not switched were more likely to say this was because they felt they were on the cheapest option already. While there were no significant differences in terms of being aware of the choice of electricity suppliers or in comparing electricity deals, it is important that those living in the most deprived areas are aware of the choices available to them, and so the Utility Regulator may wish to explore ways in which engagement with and understanding of energy deals can be increased amongst these consumers.

Prepayment meter customers

The prevalence of prepayment meters in domestic consumers homes has continued to increase. 47% now have a prepayment meter for electricity compared to 39% in 2021 and 43% in 2022, while 69% have a gas prepayment meter, compared to 57% in 2021 and 59% in 2022. The majority of electricity (96%) and gas (97%) consumers who use a prepayment meter are content to remain using this method. Convenience was the most often cited reason for having a prepayment meter for both electricity (78%) and gas (75%) consumers, followed by to monitor energy use (33% for electricity and 34% for gas).

Respondents who have a prepayment meter for electricity or gas were more likely than credit customers to be unaware of in what form they receive their correspondence, more likely to say they have not received any correspondence and less likely to read the correspondence that they received. This is to be expected since consumers with a prepayment meter are likely only to receive an annual statement or notices around tariff increases rather than regular correspondence from their supplier. In contrast, respondents with a prepayment meter were more likely than those who have a credit meter to have switched their electricity or gas suppliers.

Those who have a prepayment meter were more likely to report that they sometimes struggle to pay their electricity or gas bill and were more likely than those with a credit meter to have borrowed money to pay their electricity bills. 20% of respondents with an electricity prepayment meter had run out of money on their meter and gone without electricity in the past year. These difficulties may explain why customers on a prepayment meter are more likely to be 'switchers' as they are more encouraged to find the best deal. Nevertheless, with prepayment customers more likely to be unaware of energy supplier's consumer protection obligations it is important for them to be fully aware of the details of their current contract.

Decreased engagement with correspondence

The Domestic Tracker in 2022 found that consumers were more likely than in the previous Tracker in 2021 to engage with correspondence from their energy suppliers. In 2023, however, the proportion of respondents that could not recall in what form they received correspondence from their energy supplier increased from 11% to 19% for electricity customers, and from 18% to 27% for gas customers. The proportion of respondents that said they glanced at or read their correspondence in full has also fallen from 77% to 66% for electricity customers and from 70% to 64% for gas customers between 2022 and 2023. Those that suggested they had not received any correspondence also increased from 13% to 21% for electricity customers and 22% to 28% for gas customers. With regards to their energy contract and choice of suppliers, 89% of domestic consumers are now completely aware that they have a choice between electricity suppliers, compared to 83% in 2022. Over half (53%) of domestic consumers have also compared their electricity deal, compared to 54% in 2022.

Despite the decreased engagement with energy suppliers, domestic consumers are now more likely to have switched their electricity supplier. 51% have switched electricity supplier at least once, compared to 44% in 2022, with the proportion that switched in the last three years also increasing slightly from 69% to 71%. However, it was electricity switchers that were more likely to show engagement with their supplier. Switchers (those who had switched supplier in the

last three years) were more likely to have said they read the last piece of correspondence they received from their supplier and were more likely to have compared electricity deals and agree that having a choice between suppliers gives access to better deals. It may therefore be this greater engagement that has given electricity switchers more motivation to check that they are on the best deal when compared with non-switchers, and so the Utility Regulator may therefore wish to explore ways in which the benefits of increased engagement with energy suppliers can benefit domestic consumers.

Passiveness in rural areas

Rural domestic consumers have continued to have a more static approach to their energy contract, with 43% reporting that they had switched their electricity supplier and 27% of those who had switched doing so within the past year. This compares to 56% of urban customers who have switched and 39% that have done so in the past year. This could be explained by rural customers showing less interest in comparing electricity deals, or by them being less aware that they have a choice of suppliers. However, an alternative explanation could be found when looking at the ways in which domestic consumers switch their supplier. 45% of urban respondents who had switched had done so through a doorstep seller, compared to 24% of rural respondents. Rural consumers could therefore be less aware of their options as they do not receive as many (or any) direct approaches to switch their supplier.

Impact of self-disconnection¹⁰ on trust and overall satisfaction with energy supplier

20% of domestic customers with a prepayment meter and 3% with a credit meter had gone without electricity at least once over the past year. This appears to have impacted the trust these customers place in their energy supplier. One quarter (26%) of those who had gone without electricity did not trust their supplier to treat them fairly, while one third (33%) did not trust them to provide a fair price. This has also impacted on overall satisfaction, with under one fifth (17%) of those who had been self-disconnected from their supply reporting dissatisfaction with their energy supplier.

In addition to this, 31% of domestic consumers who had experienced self-disconnection were not confident they were on the best electricity deal. These negative perceptions may therefore explain why such respondents were more likely to have switched their electricity supplier. Three in five (58%) of those who had experienced self-disconnection had switched their supplier at least once, compared to half (50%) who had not experienced self-disconnection from their electricity supply. This further emphasises the need for domestic consumers to be aware of how to compare energy deals and determine which deal works best for their current circumstances.

¹⁰ Self-disconnection refers to respondents who have gone without electricity or gas because the cost was too high or because they had ran out of credit on their prepayment meter.

Awareness of supplier obligations remains low in vulnerable groups

There has been a further increase in the awareness of energy supplier's obligations to protect consumers. In 2021, one quarter (25%) of respondents were completely aware of these obligations, with this increasing to 35% in 2022 and 39% in 2023. There has also been an increase in the proportion of domestic consumers that know how to make a complaint if they felt these obligations were not being met. In 2021, two thirds (66%) said they would know how to go about making such a complaint, with this increasing slightly to 68% in 2022, and then to 80% in 2023. However, several subgroups who would be considered as being potentially vulnerable were more likely to not be aware of these obligations, including:

- Those in the C2DE socioeconomic group compared to those in the ABC1 group;
- Those who privately rent compared to those who own their home;
- Those who have children living in their household compared to those who do not; and
- Those who have self-disconnected from their electricity and gas supply compared to those who have not.

The Utility Regulator may therefore wish to explore the best methods of increasing awareness of energy supplier's obligations amongst these subgroups.

Low awareness and usage of support services aimed at vulnerable consumers

Awareness of support services offered by energy companies has continued to grow. In 2021, one fifth (20%) of respondents knew about the services offered, with this rising to 29% in 2022 and then to over one third (36%) in the 2023 Tracker. However, despite the increased awareness overall, respondents identified as having a disability or illness or as being vulnerable were less likely to be aware, and so uptake of these services remains low amongst those who could potentially avail of them. Only 4 of the 36 respondents, who are dependent or live with someone who is medically dependent on electricity, had signed up for NIE Networks' Critical Care Register (inferences should not be drawn from this finding alone due to the low base), while 99% of those in the high and medium vulnerability group were not signed up to their supplier's Customer Care Register.

The 2023 Tracker also examined awareness and uptake of NI Water's support services, and while awareness about these services has increased from 13% in 2022 to 23%, two thirds (67%) of respondents said they did not know about the services. Again, those respondents who could potentially avail of such services were more likely to be unaware of what they are.

As vulnerable domestic consumers were amongst the most likely respondents to report going without or delaying the purchase of essentials and to have had to borrow money to pay their electricity bills, it is important that they are fully aware of any support services that are available to them to help alleviate any energy pressures they face. Vulnerable customers remain less likely to be internet users or to be confident internet users, and so the Utility Regulator should consider alternative methods of increasing awareness.

Customers without access to the internet may be missing out on vital consumer information

Domestic consumers with no access to or lacking confidence in using the internet continue to show lower engagement with their energy contract, particularly in relation to switching. Those without access to the internet were more likely to be unaware they have a choice of electricity suppliers, while those who were not confident internet users were less likely to indicate confidence in their electricity deal (although there was no significant difference between those who said they were not confident with their deal). Domestic consumers who do not have internet access and who are not confident internet users were less likely to have compared their electricity deal. Therefore, it is not surprising that these customers were also less likely to have switched their electricity supplier while also being more likely to say they would not switch their supplier in the next year.

The lower engagement amongst older domestic consumers may also be explained by their tendency to not use the internet or not be confident internet users. Over one quarter (27%) of those aged 65 and older indicated they do not have any access to the internet, while 46% reported being not confident as an internet user. Along with those who would be considered vulnerable, deprivation was also an indicator of digital inclusion. 11% of those living in the most deprived areas do not have internet access, while 19% did not think of themselves as confident internet users. This compares to 5% of those in the least deprived areas who do not have internet access and 10% who are not confident internet users. It is therefore important for energy suppliers to ensure that those consumers who are digitally excluded are kept fully informed of their energy deal and of any possibilities to improve on it.

Low uptake of renewable energy sources

8% of respondents reported that they use renewables or low carbon technologies (LCTs) for electricity or heating in their home. With regards to heating specifically, fewer than 10 respondents indicated that they use renewable energy sources or LCTs.

The proportion of domestic consumers that have recently incorporated energy efficiency measures has fallen since the previous Tracker. 37% of respondents in 2022 said they had put energy efficiency measures in place in the last three years, with this falling to one quarter (26%) in 2023. However, those who had not installed such measures in the last three years were now more likely to have installed them more than three years ago, suggesting that having these measures in place has now become the norm for many domestic consumers.

Appendix A - Detailed methodology

Approach

Perceptive Insight undertook a statistically representative survey of domestic energy consumers in Northern Ireland using a telephone interviewing methodology. The representative nature of the research allows statistically significant comparisons to be made between subgroups, such as demographics and location. The survey represents a baseline study which will be repeated periodically over time to measure and track changes in consumer perceptions.

Interviewing took place during October and November 2023 with each interview taking, on average, 15 to 20 minutes to complete. Interviewing was carried out in compliance with UK GDPR and the Market Research Society Code of Conduct.

The following subsections outline the methodological approach taken to the study.

Questionnaire design

The questionnaire was designed in collaboration with the Utility Regulator project team. Where possible, questions were designed to allow for comparison with the 2019, 2021 and 2022 Domestic Consumer Insight Tracker surveys. The questionnaire was designed in a multi-stage approach which allowed the UR to provide regular feedback on development of the questionnaire to ensure the content met its objectives and provided insightful information from which to draw policy implications. A short pilot was conducted prior to implementation of the main survey fieldwork. This was to ensure that the survey questions were easily understood and that the survey itself was of the intended average duration. No significant changes were required following this process.

Sample design

Survey sample design is critical to ensuring the robustness, reliability, representativeness, and replicability of the research. As this is a tracker study, it is also important that there is consistency in the sampling approach over time so that future comparison of the data can be drawn.

Sampling frame

The sampling frame for this study includes all domestic energy bill payers. Table A1 shows the current structure of domestic energy consumers in Northern Ireland from published government sources¹¹.

Table A1: Demographics of NI domestic energy consumers

STRATIFICATION VARIABLE		PERCENTAGE IN NI POPULATION 18+
Age (HRP)	18 - 24	2%
	25 - 34	13%
	35 - 44	18%
	45 - 64	39%
	65 and over	28%
Gender	Male	49%
	Female	51%
SEG	ABC1	50%
	C2DE	50%
Urban/Rural	Urban	60%
	Rural/Mixed	40%
Total		100%

A stratified sampling approach was implemented to provide sufficient numbers for subgroup analysis. The table below illustrates the quotas set for this study for age, gender, socioeconomic group and location:

Table A2: Sample stratification

STRATIFICATION VARIABLE		TARGET
Age (HRP)	18 - 24	33
	25 - 34	190
	35 - 44	269
	45 - 64	591
	65 and over	417
Gender	Male	735
	Female	765
SEG	ABC1	750
	C2DE	750
Urban/Rural	Urban	900
	Rural/Mixed	600
Total		1500

Quotas were also set for District Council based on mid-year population estimates.

¹¹ Age, gender and urban/rural breakdown sourced from NISRA 2019 Mid-Year Population Estimates; SEG sourced from 2021 Census.

Respondent demographics

The table below indicates the final survey responses achieved by age, gender, socio-economic group and location. ¹²

STRATIFICATION VARIABLE		ACHIEVED NO.	ACHIEVED %
Age (HRP)	18 - 34	215	14%
	35 - 44	263	18%
	45 - 64	572	38%
	65 and over	422	28%
	Prefer not to say	30	2%
Gender	Male	730	49%
	Female	771	51%
	Other	1	0%
SEG ¹³	ABC1	730	49%
	C2DE	727	48%
	Prefer not to say	45	3%
Urban/Rural	Urban	905	60%
	Rural/Mixed	597	40%
Council	Antrim and Newtownabbey	120	8%
	Ards and North Down	128	9%
	Armagh City, Banbridge and Craigavon	167	11%
	Belfast	273	18%
	Causeway Coast and Glens	117	8%
	Derry City and Strabane	133	9%
	Fermanagh and Omagh	88	6%
	Lisburn and Castlereagh	120	8%
	Mid and East Antrim	101	7%
	Mid Ulster	123	8%
	Newry, Mourne and Down	132	9%
Multiple Deprivation Measure quintile	1 – Most deprived	286	19%
	2	299	20%
	3	310	21%
	4	310	21%
	5 – Least deprived	297	20%
Total		1502	100%

¹²Percentages cited in this report were calculated using unrounded figures then rounded to the nearest whole percent. Percentages for categories in the charts therefore may not sum to 100% due to rounding. Percentages cited that combine multiple response categories may not be equal to the sum of the rounded percentages for these categories.

¹³The socioeconomic group is based on the occupation of the chief income earner in the household. Those in the ABC1 group consist of people working in higher, intermediate and junior managerial, administrative, professional occupations. Those in the C2DE group consist of people working in skilled, semi-skilled, and unskilled manual occupations, as well as those who are unemployed.

Margin of error

The following table details the maximum margin of error, at 95% confidence levels, associated with various sample sizes.

Table A3: Margin of error

Sample size	Maximum margin of error (at 95% confidence limits)
100	±9.8%
200	±6.9%
300	±5.7%
400	±4.9%
500	±4.4%
1,000	±3.1%
1,500	±2.5%

This means that we can be 95% confident that the true value for the NI energy consumer population will lie in a range that is +/- the corresponding margin of error percentage from the survey estimate.

Implementation

Survey questionnaires were 'scripted' onto a specialised CATI (Computer Assisted Telephone Interviewing) system to facilitate optimum flow and accuracy during interviewing. All interviewers were fully briefed on the specific requirements of the project at hand prior to commencement.

Data cleaning and quality assurance

Telephone interviewing was quality assured in line with the **IQCS** (Interviewer Quality Control Scheme). As all interviewing was conducted in-house, consultants worked closely with interviewers and supervisors to monitor and assure quality responses throughout the fieldwork period.

On completion of interviewing, data integrity and validation checks were conducted on the data file. This included checking bases were correct, that filter questions had been adhered to, ensuring the data for each variable fell within the expected range, and checking outlier data for accuracy. Following this process of data cleaning, analysis was conducted on the data.

Appendix B - Detailed demographics

As part of the quantitative survey to determine domestic customer views of energy in NI, respondents were asked a number of questions about themselves in order to verify that the sample was indeed representative of the population as a whole. As such, the tables below summarise the demographic characteristics of the survey respondents.

Table B.1: Gender

Gender		
Gender	Count	Percentage
Male	730	49%
Female	771	51%
Other	1	0%
Total	1502	100%

Table B.2: Age

Age		
Age	Count	Percentage
18-34	215	14%
35-44	263	18%
45-64	572	38%
65 plus	422	28%
Refused	30	2%
Total	1502	100%

Table B.3: Tenure

Tenure		
Tenure	Count	Percentage
Rent from a private landlord	163	11%
Rent from NI Housing Executive	177	12%
Rent from a housing association	54	4%
Own your home or buying through a mortgage	1078	72%
Refused	30	2%
Total	1502	100%

Table B.4: Employment status

Employment status		
Employment status	Count	Percentage
Working full time	598	40%
Working part time	185	12%
Unemployed	196	13%
Retired	453	30%
Student	15	1%
Other	32	2%
Refused	23	2%
Total	1502	100%

Table B.5: Means tested benefit

Means tested benefit		
Means tested benefit	Count	Percentage
Yes	385	26%
No	1105	74%
Don't know	12	1%
Total	1502	100%

Table B.6: Socioeconomic group

Socioeconomic group		
SEG	Count	Percentage
AB	219	15%
C1	511	34%
C2	409	27%
DE	318	21%
Refused	45	3%
Total	1502	100%

Table B.7: Internet access*

Internet access		
Internet access	Count	Percentage
Access at home	1388	92%
Access outside of home	15	1%
Access using mobile data	28	2%
Do not have access	101	7%

*Multiple choice question

Table B.8: Method of accessing internet*

Method of accessing internet		
Method of accessing internet	Count	Percentage
Home computer/laptop	784	55%
Tablet/ iPad	521	37%
Public work computer/ laptop	174	12%
Mobile/ smartphone	1176	84%
Home of friends or family	10	1%
Smart TV	95	7%
Other	3	0%

*Multiple choice question

Table B.9: Confidence using the internet

Confidence using the internet		
Confidence using the internet	Count	Percentage
1 – Not at all confident	145	10%
2	123	8%
3	221	15%
4	337	22%
5 – Very confident	676	45%
Total	1502	100%

Table B.10: English as a first language

English as a first language		
English as a first language	Count	Percentage
Yes, and speak no other languages	1430	95%
Yes, and speak one or more other languages	44	3%
No	7	0%
Refused	21	1%
Total	1502	100%

Table B.11: Highest level of education achieved

Highest level of education achieved		
Highest level of education achieved	Count	Percentage
1 - 4 O levels / CSEs / GCSEs (any grades), Entry Level, Foundation Diploma	1282	19%
NVQ Level 1, Foundation GNVQ, Basic Skills	162	11%
5 or more O levels (passes) / CSEs (grade 1) / GCSEs (grades A* - C), School Certificate, 1 A level / 2 - 3 AS levels / VCEs, Higher Diploma	139	9%
NVQ Level 2, Intermediate GNVQ, City and Guilds Craft, BTEC First / General Diploma, RSA Diploma	37	2%
Apprenticeship	38	3%
2+ A levels / VCEs, 4+ AS levels, Higher School Certificate, Progression / Advanced Diploma	-	-
NVQ Level 3, Advanced GNVQ, City and Guilds Advanced Craft, ONC, OND, BTEC National, RSA Advanced Diploma	66	4%
Degree (for example BA, BSc), Higher degree (for example MA, PhD, PGCE)	338	23%
NVQ Level 4 - 5, HNC, HND, RSA Higher Diploma, BTEC Higher Level	55	4%
Professional qualifications (for example teaching, nursing, accountancy)	54	4%
Other vocational / work-related qualifications	13	1%
Foreign qualifications	9	1%
None of these	309	21%
Total	1502	100%

Table B.12: Disability, illness and other factors*

Disability, illness and other factors		
Disability, illness and other factors	Count	Percentage
Chronic/ serious illness	128	9%
Medically Dependent Equipment	36	2%
Oxygen use	11	1%
Physical impairment	91	6%
Unable to answer door	12	1%
Pensionable age	292	19%
Young children aged 5 or under	74	5%
Blind	**	0%
Partially sighted	9	1%
Hearing/ speech difficulties	17	1%
Unable to communicate in English	-	-
Dementia	12	1%
Developmental condition	12	1%
Mental health	69	5%
Bereavement	9	1%
Temporary life change	8	1%
Caring for an individual outside the household	40	3%
None of the above	872	58%
Prefer not to say	51	3%

*Multiple choice question

**Suppressed due to small numbers

Table B.13: Number of people in household

Number of people in household		
Number of people in household	Count	Percentage
Just me	357	24%
2	547	36%
3	231	15%
4	211	14%
5	119	8%
6+	37	2%
Total	1502	100%

Table B.14: Children under 18 in household

Children under 18 in household		
Children under 18 in household	Count	Percentage
None	1040	69%
1	148	10%
2	196	13%
3	90	6%
4	17	1%
5+	8	1%
Refused	3	0%
Total	1502	100%

Table B.16: Location

Location		
Location	Count	Percentage
Urban	905	60%
Rural	597	40%
Total	1502	100%

Appendix C - Questionnaire

Introduction questions

Good morning/afternoon. My name is ----- and I am calling on behalf of the market research company, Perceptive Insight. We are conducting a survey for NI's Utility Regulator on consumers' experiences of the gas and electricity markets. The Utility Regulator is a government department, responsible for promoting the interests of consumers in NI's electricity, gas, water and sewerage industries.

We would appreciate if we could have 20 minutes of your time to answer some questions. Please be assured that this is not a sales call and all of your responses are confidential. All interviews are conducted in accordance with Market Research Society Code of Conduct, and all data collected is held in compliance with the UK General Data Protection Regulation 2018 (UK GDPR). Your call may be monitored for training and quality purposes.

ASK ALL

Code one only

S1 Before we start, are you happy to proceed with the survey and for your answers to be collected?

Yes, happy to take part

No, I do not want to take part

ASK ALL

Code one only

S2 Are you responsible or jointly responsible for the electricity and/or gas bills in your household?

Yes – solely responsible

Yes – jointly responsible

No – not responsible CLOSE

Prefer not to say CLOSE

ASK ALL

S3 Please can you tell me your age?

Record exact age

Code to age category

Code one only

Under 18 – DO NOT INTERVIEW
18-25
25-44
45-64
65 +

ASK ALL

Code one only

S4 Please state your gender

Male
Female
Other
Rather not say

Section A: Fuel source

ASK ALL

Code one only

A1 Which of the following types of energy do you use to heat your home?

If you use more than one type, please select the one you predominantly use

Electricity heating/economy 7
Mains gas
Oil
Renewables/Low carbon technologies (LCTs) (UR to provide list for briefing)
Other fuel supply e.g. gas canisters /LPG/ coal/solid fuel
Not sure

ASK ALL

Code one only

A2 Thinking about your energy for heating your home, do you think you will switch from using <ANSWER AT Q1> to another energy source in the next 3 years? By this we mean the source such as gas or electricity, not your supplier.

Yes – within the next year
Yes – in the next 1-3 years
Yes – but not in the next 3 years
No
Not sure/ don't know

If YES at A2

Select all that apply

A3 Which energy type do you intend to switch to for heating your home?

Electricity heating/economy 7
Mains gas
Oil
Renewables/Low carbon technologies (LCTs)
Other fuel supply e.g. gas canisters /LPG/ coal/solid fuel
Not sure

If DO NOT use mains gas at A1

Select all that apply

A4 If it is available in your area, why have you not switched to using mains gas for heating your home?

Mains gas is not available at my home
Cost of installation
Cost of gas
Too much hassle
Do not trust gas
Happy with oil
Rent my property
Other
I don't know if it is available

ASK ALL

Code one only

A5 Have you put any energy efficiency measures in place in your home in the last three years?

For example, cavity wall insulation, loft insulation etc.

Please do not include smaller measures such as energy saving lightbulbs

Yes
No
Not sure

If YES at A5

Select all that apply

A6a What energy efficiency measures have you put in place?

Loft insulation
Cavity wall insulation
Solid wall insulation
Oil to gas central heating conversion
High energy efficiency oil boilers (where gas isn't available)
Other (please specify)

If NO at A5

Select all that apply

A6b Why have you not put any energy efficiency measures in place in your home in the last three years?

Cannot afford the initial outlay
Don't think they are needed
Lack of information
It would cause to much disruption
They were already in the home
Installed them more than three years ago
I rent my property/have no control over structural changes
Recently moved house
Other (please specify)
No reason
Not sure

ASK ALL

Select all that apply

A7 Do you use any renewable energy systems or low carbon technologies in your home for heating OR electricity?

Solar panels for electricity
Solar panels for water
Heat pump
Wind turbine
Other (please specify)
None

Section B: Payment

Electricity

ASK ALL

Code one only

B1 How much does your household spend on electricity in total (i.e. heating, lighting, appliances, etc.) each month?

If you are not sure of the exact figure then please estimate.

Up to £30
£30-59
£60-99
£100 or more
Don't know

ASK ALL

B2 How do you pay for your electricity (including heating, lighting, appliances, etc.)?

A pre-payment or 'pay as you go' meter is an energy meter that can be installed in homes.

With a pre-payment, or 'pay as you go' tariff, you pay for your energy before you use it - usually by adding money to a 'key', key pad or smart card

Code one only

Monthly direct debit (where your supplier takes the same amount of money from your bank account, each month, automatically)
Quarterly direct debit (where your supplier takes money from your bank account automatically, to cover your last three month's energy use)
Pay by cheque, cash or card on receipt of your bill
Prepayment or pay as you go meter (where you top up credit onto a key pad, key or card, or online, or using an app)
Other (specify)

If have electricity prepayment meter at B2

B3 Which of the following reasons describes why you have a prepayment meter for electricity?

Select all that apply

It is convenient for me
The property came with one
I was offered one by my supplier
To help my household budget energy costs
I don't need to worry about being cut off due to not paying a bill
To monitor energy use
I was given one voluntarily as part of debt collection
I was given one involuntarily as part of debt collection
I've never been given the option to move away from a prepayment meter
Other (please specify)
Don't know

If have electricity prepayment meter at B2

B4a Are you content to remain on an electricity PPM or would you prefer to switch to another type of payment such as quarterly bill payments or pay by monthly direct debit if you were able to? [ask all PPM customers]

Select one only

Yes – content to remain on electricity PPM
No – would prefer to switch to quarterly bill payments
No – would prefer to pay by monthly direct debit
I didn't know I could switch to a different payment option
Not sure

B4b If no, what is the main reason why you would prefer to switch to another payment type?

Open-ended

ASK ALL

Code one only

B5 Which of the following best describes the tariff you are on for your electricity?

Standard variable tariff (the suppliers default tariff)
A promotional tariff (e.g. fixed priced for a set amount of time, a promotional tariff with discount for a set amount of time, etc.)
Other (please specify)
Don't know

ASK ALL

Code one only

B6 How much does your household spend on <ANSWER AT Q1> to heat your home each month? [gas heating or other fuel supply]

If you are not sure of the exact figure then please estimate.

Up to £30
£30-59
£60-99
£100 or more
Don't know

Gas

If use mains gas at A1

Code one only

B7 How do you pay for your home heating? [only interested in mains gas heating]

A pre-payment or 'pay as you go' meter is an energy meter that can be installed in homes. With a pre-payment, or 'pay as you go' tariff, you pay for your energy before you use it - usually by adding money to a 'key', key pad or smart card

Monthly direct debit (where your supplier takes the same amount of money from your bank account, each month, automatically)
Quarterly direct debit (where your supplier takes money from your bank account automatically, to cover your last three month's energy use)
Pay by cheque, cash or card on receipt of your bill
Prepayment or pay as you go meter (where you top up credit onto a key pad, key or card, or online, or using an app)
Other (specify)

If have gas prepayment meter at B7

B8 Which of the following reasons describes why you have a prepayment meter for gas?

Select all that apply

It is convenient for me
The property came with one
I was offered one by my supplier
To help my household budget energy costs
I don't need to worry about being cut off due to not paying a bill
To monitor energy use
I was given one voluntarily as part of debt collection
I was given one involuntarily as part of debt collection
I've never been given the option to move away from a prepayment meter
Other (please specify)
Don't know

If have gas prepayment meter at B7

B9a Are you content to remain on a PPM or would you prefer to switch to another type of payment such as quarterly bill payments or pay by monthly direct debit if you were able to?

Code one only

Yes – content to remain on gas PPM
No – would prefer to switch to quarterly bill payments
No – would prefer to pay by monthly direct debit
I didn't know I could switch to a different payment option
Other - specify
Not sure

B9b If no, what is the main reason why you would prefer to switch to another payment type?

Open ended

Ask those who use mains gas at A1

Which of the following best describes the tariff you are on for your gas?

Code one only

Standard variable tariff (the suppliers default tariff)
A promotional tariff (e.g. fixed priced for a set amount of time, a promotional tariff with discount for a set amount of time, etc.)
Other (please specify)
Don't know

Section C: Your energy supplier

Electricity

ASK ALL

C1 Do you know who your current electricity supplier is?

(if yes please state)

Yes - please state
No
Not sure

ASK ALL

Code one only

C2 How do you receive written correspondence such as a bill or annual statement from your electricity supplier?

In the post
Via email or online
Through an app
I don't remember getting any/ Don't know
Other

ASK ALL

Code one only

C3 Thinking about the last time you received written correspondence such as a bill or annual statement from your electricity supplier....Did you read it?

Yes – I read it
Only glanced at it
Didn't look at it/read it
Didn't open it
N/A never received

Ask to those who read or glanced at

Code one only

C4 If yes, to what extent do you agree or disagree that the information was presented in a way which was clear and easy to understand?

Strongly disagree
Disagree
Neither
Agree
Strongly agree
Not sure

ASK ALL

Code one only

C5 To what extent do you trust your electricity supplier to treat you fairly in their dealings with you?

Strongly distrust
Tend to distrust
Neither trust nor distrust
Tend to trust
Completely trust
Prefer not to say
Not sure

ASK ALL

Code one only

C6 To what extent do you trust your electricity supplier to give you a fair price?

Strongly distrust
Tend to distrust
Neither trust nor distrust
Tend to trust
Completely trust
Prefer not to say
Not sure

ASK ALL

Code one only

C7 How satisfied are you with the overall service you receive from your electricity supplier?

Very dissatisfied
Dissatisfied
Neither satisfied nor dissatisfied
Satisfied
Very satisfied
Not sure

ASK ALL

Code one only

C8 To what extent, if at all, are you aware that you can choose between different electricity suppliers?

Completely aware
Somewhat aware
Not at all aware

C9 **If completely or somewhat aware:** To what extent do you agree or disagree that having a choice of suppliers gives you access to better electricity deals?

Code one only

Strongly disagree
Disagree
Neither
Agree
Strongly agree
Not sure

Gas

Ask those who use mains gas at A1

Code one only

C10 Do you know who your current gas supplier is?

Yes - please state
No
Don't know

Ask those who use mains gas at A1

Code one only

C11 How do you receive written correspondence such as a bill or annual statement from your gas supplier?

In the post
Via email or online
Through an app
I don't remember getting any/ don't know
Other

Ask those who use mains gas at A1

Code one only

C12 Thinking about the last time you received written correspondence such as a bill or annual statement from your gas supplier, did you read it?

Yes – I read it
Only glanced at it
Didn't look at it/read it
Didn't open it
N/A never received

Ask those who read or glanced at it

Code one only

C13 If yes, to what extent do you agree or disagree that the information was presented in a way which was clear and easy to understand?

Strongly disagree
Disagree
Neither
Agree
Strongly agree
Not sure

Ask those who use mains gas at A1

Code one only

C14 To what extent do you trust your gas supplier to treat you fairly in their dealings with you?

Strongly distrust
Tend to distrust
Neither trust nor distrust
Tend to trust
Completely trust
Prefer not to say
Not sure

Ask those who use mains gas at A1

Code one only

C15 To what extent do you trust your gas supplier to give you a fair price?

Strongly distrust
Tend to distrust
Neither trust nor distrust
Tend to trust
Completely trust
Prefer not to say
Not sure

Ask those who use mains gas at A1

Code one only

C16 How satisfied are you with the overall service you receive from your gas supplier?

Very dissatisfied
Dissatisfied
Neither satisfied nor dissatisfied
Satisfied
Very satisfied
Not sure

ASK ALL

Select one only

C17 There are different areas that your energy supplier might invest in over the coming years. The costs of these investments have not yet been determined but some additional costs could be passed on to customers. If this were to happen, which, if any, of the following would you be most willing to pay a little extra on your bill for?

1	Projects to protect the environment
2	Providing extra help for customers in vulnerable circumstances, for example, due to health or financial reasons
3	Improving reliability of the network to help reduce power cuts and maintain supply
4	I don't want to be charged anything extra

Section D: Complaint handling

Electricity

ASK ALL

Code one only

D1 Have you made a complaint to your current electricity supplier in the last 12 months?

Yes
No
Not sure

If complained at D1

Code one only

D2 How easy or difficult did you find it to make a complaint?

Very difficult
Difficult
Neither difficult nor easy
Easy
Very easy
Not sure

If complained at D1

Code one only

D3 How quickly was your complaint resolved?

Never and not expecting it to be
On-going
Within a day
Within two weeks
Within a month
Took longer than a month to resolve
Not sure

If complained at D1

Code one only

D4 How satisfied were you with the outcome of your complaint?

Very dissatisfied
Dissatisfied
Neither satisfied or dissatisfied
Satisfied
Very satisfied

Those who did NOT complain at D1

Code one only

D5 Have you ever wanted to complain to your current electricity supplier?

1) Yes – I wanted to but wasn't sure how to
2) Yes – I wanted to and knew how to, but never got around to it
3) Yes - I wanted to and knew how to, but I didn't think it would make a difference
4) No

Gas

Ask those who use mains gas at A1

Code one only

D6 Have made a complaint to your current gas supplier in the previous 12 months?

Yes
No
Not sure

If complained at D6

Code one only

D7 How easy or difficult did you find it to make a complaint?

Very difficult
Difficult
Neither difficult nor easy
Easy
Very easy
Not sure

If complained at D6

Code one only

D8 How quickly was your complaint resolved?

Never and not expecting it to be
On-going
Within a day
Within two weeks
Within a month
Took longer than a month to resolve
Not sure

If complained at D6

Code one only

D9 How satisfied were you with the outcome of your complaint?

Very dissatisfied
Dissatisfied
Neither satisfied or dissatisfied
Satisfied
Very satisfied

Those who did NOT complain at D6

Code one only

D10 Have you ever wanted to complain to your current gas supplier?

1) Yes – I wanted to but wasn't sure how to
2) Yes – I wanted to and knew how to, but never got around to it
3) Yes - I wanted to and knew how to, but I didn't think it would make a difference
4) No

Section E: General contact with your supplier

Electricity

ASK ALL

Code one only

E1 Have you contacted your electricity supplier in the last 12 months for any reason other than making a complaint?

Yes
No
'Yes tried to but couldn't make contact/get through'
Not sure

If Yes at E1

Code one only

E2 Thinking back to your most recent contact, what was the main reason for your contact?

Debt issue
Payment issue
Unable to top up a prepayment meter
To switch energy contract
To access services for vulnerable customers
To query a bill
Other (specify)
Not sure/ Can't remember

If Yes at E1

Code one only

E3a How easy or difficult did you find it to get in touch with your electricity supplier?

Very difficult
Difficult
Neither difficult nor easy
Easy
Very easy
Not sure

E3b **If dissatisfied**

What was the main reason why you were dissatisfied? **Open ended**

If Yes at E1

Code one only for each

E4 Again thinking back to your most recent contact, please say if you agree or disagree with each of the following statements?

I felt that my electricity supplier listened to me and understood my issue

Strongly disagree
Disagree
Neither
Agree
Strongly agree
Not sure

My electricity supplier was supportive

Strongly disagree
Disagree
Neither
Agree
Strongly agree
Not sure

My electricity supplier treated me fairly

Strongly disagree
Disagree
Neither
Agree
Strongly agree
Not sure

Gas

Ask those who use mains gas at A1

Code one only

E5 Have you contacted your gas supplier in the last 12 months for any reason other than making a complaint?

Yes
No
'Yes tried to but couldn't make contact/get through'
Not sure

If yes at E5

Code one only

E6 Thinking back to your most recent contact, what was the main reason for your contact?

For interviewers: Services for vulnerable customers include the

Debt issue
Payment issue
Unable to top up a prepayment meter
To switch energy contract
To access services for vulnerable customers
To query a bill
Other (specify)
Not sure/ Can't remember

If yes at E5

Code one only

E7 How easy or difficult did you find it to get in touch with your gas supplier?

Very difficult
Difficult
Neither difficult nor easy
Easy
Very easy
Not sure

E8 If dissatisfied

What was the main reason why you were dissatisfied? **Open response**

If yes at E5

Code one only for each

E9 Again thinking back to your most recent contact, please say if you agree or disagree with each of the following statements?

I felt that my gas supplier listened to me and understood my issue

Strongly disagree
Disagree
Neither
Agree
Strongly agree
Not sure

My gas supplier was supportive

Strongly disagree
Disagree
Neither
Agree
Strongly agree
Not sure

My gas supplier treated me fairly

Strongly disagree
Disagree
Neither
Agree
Strongly agree
Not sure

Section F: Switching

Electricity

ASK ALL

Code one only

F1 How confident, if at all, are you that you are currently on the best electricity deal that is available to you? Using a scale of 1 to 5 where 1 is Not at all confident and 5 is Very confident

1 - Not at all confident
2 -
3 -
4 -
5 - Very confident
Don't know

ASK ALL

Code one only

F2 Have you or your household ever compared electricity deals to see if you could switch to a different supplier or tariff?

Yes
No
Not sure

If yes at F2

Code one only

F3 How easy or difficult do you believe it is to compare different deals for electricity? Please use a scale of 1 to 5 where 1 is very difficult, and 5 is very easy.

Very difficult
Difficult
Neither
Easy
Very easy
Not sure

ASK ALL

Code one only

F4 How many times, if at all, have you ever switched your electricity supplier?

Never
Once
2 or 3 times
4 or more times
Don't know

Those who have switched at F4

Code one only

F5 When was the last time you switched your electricity supplier?

Under 1 year ago
1-2 years ago
2-3 years ago
3 years ago or more
Not sure

Those who have switched at F4

Select all that apply

F6 Thinking of the last time you switched electricity supplier, what were your main reasons for switching away from your previous electricity supplier?

Felt I was overpaying
Saw a promotional offer with another supplier
Advised to by family or friends
Saw a media advertisement (e.g. TV advert) for another supplier
Experienced poor customer service
Sold to by doorstep seller
Sold to by a sales agent at a stall for example in a shopping centre or event
Other (please specify)
Not sure

Those who have switched at F4

Code one only

F7 How did you switch from your previous electricity supplier?

Via the telephone
Via the internet
Via a doorstep seller
Other (please specify)
Cant remember

Those who have switched at F4

Code one only

F8 Thinking back to when you switched, do you agree or disagree that you received the deal you were expecting?

Strongly disagree
Disagree
Neither
Agree
Strongly agree
Not sure

Those who have switched at F4

Code one only

F9a Overall, was the experience of switching electricity suppliers positive, negative or indifferent? Please use a scale of 1-5 where 1 is very negative and 5 is very positive

1 - Very negative
2
3
4
5 - Very positive
Can't remember

If negative at F9a

F9b Why was this a negative experience for you? **Open response**

For those who have not switched F4

Select all that apply

F10 Why have you never switched your electricity supplier?

Didn't realise I could switch
Happy with current service
Feel I am on the cheapest option
Reputation of the supplier is better than other suppliers
Wouldn't know how to
Too much hassle
Worry something would go wrong
Take too long

ASK ALL

Code one only

F11 How likely are you to switch electricity suppliers in the next 12 months? Please use a scale of 1-5 where 1 is not at all likely and 5 is very likely [ask all]

1 - Not at all likely
2
3
4
5 - Very likely
Don't know

Gas

Ask those who use mains gas at A1

Code one only

F12 How confident, if at all, are you that you are currently getting the best gas deal that is available to you? Using a scale of 1 to 5 where 1 is Not at all confident and 5 is Very confident

1 - Not at all confident
2 -
3 -
4 -
5 - Very confident
Don't know

Ask those who use mains gas at A1

Code one only

F13 Do you have the option to switch between gas suppliers in your area?

1 - Yes
2 - No
3 - Not sure

If yes at F13

Code one only

F14 Have you or your household ever compared gas deals to see if you could switch to a different supplier or tariff?

Yes
No
Not sure

If yes at F14

Code one only

F15 How easy or difficult do you believe it is to compare different deals for gas? Please use a scale of 1 to 5 where 1 is very difficult, and 5 is very easy.

Very difficult
Difficult
Neither
Easy
Very easy
Not sure

Ask those who use mains gas at A1

Code one only

F16 How many times, if at all, have you ever switched your gas supplier?

Never
Once
2 or 3 times
4 or more times
Don't know

If switched at F16

Code one only

F17 When was the last time you switched your gas supplier?

Under 1 year ago
1-2 years ago
2-3 years ago
3 years ago or more
Not sure

If switched at F16

Select all that apply

F18 Thinking of the last time you switched gas supplier , what were your main reasons for switching away from your previous gas supplier?

Felt I was overpaying
Saw a promotional offer with another supplier
Advised to by family or friends
Saw a media advertisement (e.g. TV advert) for another supplier
Experienced poor customer service
Sold to by doorstep seller
Sold to by a sales agent at a stall for example in a shopping centre or event
Other (please specify)
Not sure

If switched at F16

Code one only

F19 How did you switch from your previous gas supplier?

Via the telephone
Via the internet
Via a doorstep seller
Other (please specify)
Can't remember

If switched at F16

Code one only

F20 Thinking back to when you switched, do you agree or disagree that you received the deal you were expecting?

Strongly disagree
Disagree
Neither
Agree
Strongly agree
Not sure

If switched at F16

Code one only

F21a Overall, was the experience of switching gas suppliers positive, negative or indifferent? Please use a scale of 1-5 where 1 is very negative and 5 is very positive

1 - Very negative
2
3
4
5 - Very positive
Can't remember

If negative at F21

F21b Why was this a negative experience for you? **Open response**

Those you have NOT switched at F16

Select all that apply

F22 Why have you never switched your gas supplier?

Didn't realise I could switch
Happy with current service
Feel I am on the cheapest option
Reputation of the supplier is better than other suppliers
Wouldn't know how to
Too much hassle
Worry something would go wrong
Take too long

Ask all who use mains gas at A1

Code one only

F23 How likely are you to switch electricity suppliers in the next 12 months? Please use a scale of 1-5 where 1 is not at all likely and 5 is very likely.

1 - Not at all likely
2
3
4
5 - Very likely
Don't know

Section G: Payment difficulties

Electricity

ASK ALL

Code one only

G1 We would like to understand a little more about how your financial situation is affected by your electricity costs. Which of the following statements best describes your situation over the last 12 months?

I never struggle to pay my electricity bills
I sometimes struggle to pay my electricity bills but I usually manage to keep on top of it
I struggle to pay my electricity bills and I am often behind in my payments
I always struggle to pay my electricity bills and I am nearly always behind in my payments
I would rather not say

To those who struggle at G1 (code 3 and 4)

Code one only

G2 Have you got a repayment plan in place with your electricity supplier?

This is where you pay fixed amounts over a set period of time, meaning you'll pay what you can afford. The payment plan will cover what you owe plus an amount for your current use.

Yes
Didn't know I could set up a payment plan
No
Not sure

If yes at G2

Code one only

G3 Did you discuss the repayment plan with your electricity supplier to ensure it was suitable for you?

Yes
No
Can't remember/ Not sure

ASK ALL (except those who use electricity prepayment meter)

Code one only

G4 Thinking about the past 12 months, have you ever gone without electricity that you really needed in your home because the cost was too high?

Never
Occasionally (a few times a year)
Often (around once a month)
Regularly (most weeks)
Would rather not say

Ask those who use an electricity prepayment meter

Code one only

G5 Thinking about the past 12 months, have you ever run out of credit on your meter and temporarily gone without electricity?

Never
Occasionally (a few times a year)
Often (around once a month)
Regularly (most weeks)
Would rather not say

If yes at G5 (options 2,3,4)

Select all that apply

G6 Why have you gone without electricity?

I could not afford to top up
I could not leave the house to top up
We didn't realise the meter was low
We forgot to top up
Other

If yes at G5 (options 2,3,4)

Code one only

G7 Thinking about the last time you ran out of credit on your electricity meter, how long were you without electricity?

1 hour or less
2-3 hours
4-6 hours
7-11 hours
12- up to 24 hours
1-2 days
3 days or more
Don't know

ASK ALL

Code one only

G8a In the last 12 month, has your household ever gone without or delayed getting other essentials (for example, food, phone credit, bus fare, car fuel, gas or oil) so that you were able to pay for your electricity?

Never
1 to 3 times a year
Less than once a month
More than once a month but less than once a week
More than once a week
Don't know

If G8a=2,3,4,5

Write in

G8b What essentials did you have to go without or delay getting so that you were able to pay for your electricity?

--

G9 Thinking about your electricity bills in the previous year. To what extent do you agree or disagree with each of the following statements?

Code one only for each

ASK ALL	
1	We've reduced the amount of electricity we are using
	Strongly disagree
	Disagree
	Neither
	Agree
	Strongly agree
	Not sure
2	We've had to borrow to pay our electricity bills
	Strongly disagree
	Disagree
	Neither
	Agree
	Strongly agree
	Not sure
Credit customers – code 1 or 2 at B2	
3	We've reduced the amount of our direct debit for our electricity bills
	Strongly disagree
	Disagree
	Neither
	Agree
	Strongly agree
	Not sure
4	We've fallen behind on our electricity bill and owe money to our electricity supplier
	Strongly disagree
	Disagree
	Neither
	Agree
	Strongly agree
	Not sure
5	We've asked our electricity supplier for a bill payment holiday
	Strongly disagree
	Disagree
	Neither
	Agree
	Strongly agree
	Not sure
6	We've cancelled the direct debit payment for our electricity bill
	Strongly disagree
	Disagree
	Neither
	Agree

Strongly agree
Not sure
Electricity PPM customers
7 We've reduced the amount we usually put on our electricity prepayment meter
Strongly disagree
Disagree
Neither
Agree
Strongly agree
Not sure

Gas

Mains gas at A1

Code one only

G10 We would like to understand a little more about how your financial situation is affected by your home heating costs. Which of the following statements best describes your situation over the last 12 months?

I never struggle to pay my gas bill
I sometimes struggle to pay my gas bill but I usually manage to keep on top of it
I struggle to pay my gas bill and I am often behind in my payments
I always struggle to pay my gas bill and I am nearly always behind in my payments
I would rather not say

If struggle at G10 (code 3 or 4)

Code one only

G11 Have you got a repayment plan in place with your gas supplier?

Yes
Didn't know I could set up a payment plan
No
Not sure

If yes at G11

Code one only

G12 Did you discuss the repayment plan with your gas supplier to ensure it was suitable for you?

Yes
No
Can't remember/ Not sure

Ask all who use mains gas at A1 (except those with gas PPM)

Code one only

G13 Thinking about the past 12 months, have you ever gone without heating that you really needed in your home because the cost was too high?

Never
Occasionally (a few times a year)
Often (around once a month)
Regularly (most weeks)
Would rather not say

Ask those with a gas PPM

Code one only

G14 In the past 12 months, have you ever run out of credit on your meter and temporarily gone without gas?

Never
Occasionally (a few times a year)
Often (around once a month)
Regularly (most weeks)
Would rather not say

If yes at G14 (options 2,3,4)

Select all that apply

G15 Why have you gone without gas?

I could not afford to top up
I could not leave the house to top up
We didn't realise the meter was low
We forgot to top up
Other

If yes at G14 (options 2,3,4)

Code one only

G16 Thinking about the last time you ran out of credit on your gas meter, for how long were you without gas?

1 hour or less
2-3 hours
4-6 hours
7-11 hours
12- up to 24 hours
1-2 days
3 days or more
Don't know

Ask all who use mains gas at A1

Code one only

G17a In the last 12 month, has your household ever gone without or delayed getting other essentials (for example, food, phone credit, bus fare, car fuel, gas or oil) so that you were able to pay for your gas?

Never
1 to 3 times a year
Less than once a month
More than once a month but less than once a week
More than once a week
Don't know

If G17a=2,3,4,5

Write in

G17b What essentials did you have to go without or delay getting so that you were able to pay for your gas?

--

G18 Thinking about your gas bills in the previous year. To what extent do you agree or disagree with each of the following statements?

ASK ALL	
1	We've reduced the amount of gas we are using
	Strongly disagree
	Disagree
	Neither
	Agree
	Strongly agree
	Not sure
2	We've had to borrow to pay our gas bills
	Strongly disagree
	Disagree
	Neither
	Agree
	Strongly agree
	Not sure
Credit customers – code 1 or 2 at B7	
3	We've reduced the amount of our direct debit for our gas bills
	Strongly disagree
	Disagree
	Neither

Agree
Strongly agree
Not sure
4 We've fallen behind on our gas bill and owe money to our gas supplier
Strongly disagree
Disagree
Neither
Agree
Strongly agree
Not sure
5 We've asked our gas supplier for a bill payment holiday
Strongly disagree
Disagree
Neither
Agree
Strongly agree
Not sure
6 We've cancelled the direct debit payment for our gas bill
Strongly disagree
Disagree
Neither
Agree
Strongly agree
Not sure
Gas PPM customers
7 We've reduced the amount we usually put on our gas prepayment meter
Strongly disagree
Disagree
Neither
Agree
Strongly agree
Not sure

Section H: Consumer protections

ASK ALL

Code one only

H1 Are you aware that energy suppliers have certain obligations to protect you as a consumer?

Yes – completely aware
Yes – somewhat aware
Not at all aware
Not sure

If Yes at H1

Code one only

H2 Would you know how to go about making a complaint if you felt your supplier was not meeting these obligations?

Yes
No
Not sure

Section I: Support services

ASK ALL

Code one only

I1 Are you aware energy companies have special services in place to support those who are vulnerable in the community / those that need extra support? For example, customers with disabilities, those with mental health issues, etc.

Yes – and know a bit about the services offered
Yes – but don't know what these services are
No
Not sure

ASK ALL

Select all that apply

I2 Have you used any support services offered by energy companies?

For interviewer: The Critical Care Register is the NI Electricity Networks' register while a Customer Care Register is used by gas and electricity suppliers (e.g. Budget Energy, SSE Airtricity, Firmus Energy).

Signed up to the Critical Care Register
Signed up to the Customer Care Register
Requested a large print bill
Included in the Password Scheme
Other (specify)
None of these

If used a service at I2

Code one only

I3 Thinking about the services you used, in general how satisfied were you with this? Please rate on a scale of 1-10, where 1 is very dissatisfied and 10 is very satisfied?

Very dissatisfied
Dissatisfied
Neither
Satisfied
Very satisfied
Don't know

ASK ALL

Code one only

I4 Are you aware NI Water have special services in place to support those who are vulnerable in the community / those that need extra support?

For example, customers with disabilities, those with mental health issues, etc.

Yes – and know a bit about the services offered
Yes – but don't know what these services are
No
Not sure

ASK ALL

Select all that apply

I5 Have you used any support services offered by NI Water?

Signed up to the Customer Care Register
Other (specify)
None of these

If used a service at I5

Code one only

I6 Thinking about the services you used, in general how satisfied were you with this? Please rate on a scale of 1-10, where 1 is very dissatisfied and 10 is very satisfied?

Very dissatisfied
Dissatisfied
Neither
Satisfied
Very satisfied
Don't know

Section J: Final Demographics

ASK ALL

Select one only

J1 Do you..?

Rent your home from a private landlord
Rent your home from the NI Housing Executive
Rent your home from a housing association (e.g. Radius, Clanmil, Choice Housing)
Own your home or buying through a mortgage
Other (specify)
Prefer not to say

ASK ALL

Select one only

J2 Which of the following best describes your current employment status?

Working full time
Working part time
Unemployed
Retired
Student
Other (please specify)
Prefer not to say

ASK ALL

Select one only

J3 Do you or anyone in your household receive a means tested benefits (other than Child Benefit)?

Yes
No
Don't know

ASK ALL

J4 What is the occupation of the chief income earner in your household?

Open ended (to code SEG)

ASK ALL

Select all that apply

J5 Do you or any member of your household have access to the internet?

Yes, have access to the internet at home
Yes, have access to the internet outside of home i.e. work, library, community centre etc.
Yes, have access to internet using mobile data
NO NOT have access to the internet

If yes at J5

Select all that apply

J6 How do you/ your household typically access the internet?

Home Computer/Laptop
Tablet/ iPad
Public/ work computer/ laptop etc
Mobile/ smartphone
Home of friends or family
Other (please specify)

ASK ALL

Code one only

J7 Overall, how confident are you as an internet user?

1 - Not at all confident
2 -
3 -
4 -
5 - Very confident

ASK ALL

Code one only

J8 Can I check, is English your first or main language?

Yes, and I speak no other language
Yes, but I speak one or more other languages
No PLEASE SPECIFY LANGUAGE
Rather not say

ASK ALL

Code one only

J9 What is the highest level of education you have completed?

1 - 4 O levels / CSEs / GCSEs (any grades), Entry Level, Foundation Diploma
NVQ Level 1, Foundation GNVQ, Basic Skills
5 or more O levels (passes) / CSEs (grade 1) / GCSEs (grades A*- C), School Certificate, 1 A level / 2 - 3 AS levels / VCEs, Higher Diploma
NVQ Level 2, Intermediate GNVQ, City and Guilds Craft, BTEC First / General Diploma, RSA Diploma
Apprenticeship
2+ A levels / VCEs, 4+ AS levels, Higher School Certificate, Progression / Advanced Diploma
NVQ Level 3, Advanced GNVQ, City and Guilds Advanced Craft, ONC, OND, BTEC National, RSA Advanced Diploma
Degree (for example BA, BSc), Higher degree (for example MA, PhD, PGCE)
NVQ Level 4 - 5, HNC, HND, RSA Higher Diploma, BTEC Higher Level
Professional qualifications (for example teaching, nursing, accountancy)
Other vocational / work-related qualifications
Foreign qualifications
None of these

ASK ALL

Select all that apply

J10 There are a wide range of factors that could mean anyone might need extra help or support. Do you feel that any of the following factors apply to you or anyone in your household at the moment?

Chronic/serious illness
Medically Dependant Equipment
Oxygen use
Physical Impairment
Unable to answer door
Pensionable Age
Young children aged 5 or under
Blind
Partially sighted
Hearing /speech difficulties (including deaf)
Unable to communicate in English
Dementia
Developmental condition
Mental Health
Bereavement
Temporary - life change for example post hospital recovery
Caring for an individual outside the household
None of the above
Prefer not to say

ASK ALL

Code one only

J11 How many members/people (including children) are there in your household altogether (that are currently living at home with you)?

Please include yourself in the total

Just me
2
3
4
5
6+

ASK ALL

J12 How many children under the age of 18 live in your household?

ASK ALL

Code one only

J13 In which type of location do you currently live?

Urban location
Sub-urban location
Rural location
Don't know

[Record postcode] - For deprivation quintile analysis