



## Research on The Impact of the Energy Crisis on Affordability and the Impact of Energy Transition on Consumers

**FINAL**

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## Executive Summary

The Consumer Council commissioned Social Market Research (SMR) to undertake research to explore the impact of the current energy crisis on affordability as well as to examine consumer awareness and understanding of decarbonisation and energy transition. The research is based on a large-scale survey of 1007 energy consumers, and was conducted in February and March 2023. The research was conducted independently by Social Market Research (SMR) in accordance with the ISO20252 Standard of which SMR is fully accredited.

### Key findings from the survey of energy consumers

#### Prevalence of fuel poverty

- 51% of households are classified as being in fuel poverty (*Note: this is an estimate based on the proportion of households spending more than 10% of net household income on energy. The methodology used is not the same as the official Northern Ireland House Condition survey figures and is not directly comparable. This research aims to compliment the official research and provide an estimate of consumers' experiences during the current energy crisis*).
- Fuel poverty was found to be more prevalent in lower income households, those living in social housing and households in receipt of Universal Credit. Consumers with a disability, those in lower social grades, older consumers and those with poor mental and physical health, were also more likely to report living in fuel poor households.

#### Current use of energy and affordability

- 48% say they cannot afford to heat their homes due to current cost of energy.
- Consumers more likely to say they cannot afford to heat their homes because of the cost of energy included: women; consumers with a disability; those in lower social grades; lower income consumers; those living in households in receipt of universal credit; those using food banks; and those living in fuel poor households.
- Most consumers report cutting back on their energy use this winter (electricity, 79%; gas, 84%; oil, 84%).
- 27% of consumers had run out of energy because they couldn't afford to top up (electric PPM, 34%; gas PPM, 33%; oil, 33%) [19% of electricity PPM and 27% of gas PPM consumers say they run out of energy on a weekly basis because of affordability].
- A majority of consumers are worried about not being able to pay their energy bills (electric PPM, 71%; gas PPM, 69%; electric direct debit, 56%; gas direct debit, 66%; oil, 71%).
- 19% of electricity consumers who pay their bills by direct debit say they are currently unable to afford the direct debit amount (gas direct debit customers, 25%).

#### Cost of energy

- 94% are concerned about the current cost of energy.
- 51% say they are coping well with energy bills at the moment with 49% not coping well.
- Those not coping well are more likely to be on lower incomes, be in fuel poverty, and live in urban areas.
- 74% say they struggle to some degree to pay their energy bills.

#### Consumers behaviours and the current cost of energy

- 47% report turning off radiators in some rooms to save on energy and reduce cost.
- 28% use an electric heater rather than using oil or gas to heat their home.
- 71% report heating their home for fewer hours than they would like.
- 42% heat their home to a lower temperature than they would like to.
- 75% say they wear extra layers of clothing to help save energy.
- 68% delay putting on their heating to save on cost.
- 18% are prioritising eating over heating their home (11% have cut down on hot meals to save on energy).

### Presence of mould or damp and ambient temperature of household in winter

- 44% say they have mould or damp in their home.
- Consumers living in fuel poor households were more likely to say they have mould or damp (49% vs. 38%).
- 49% said their home in winter is normally cold (50% said their home is normally warm) .
- 43% said their home is normally cold in winter because they can't afford to heat it.

### Awareness of help and support for consumers

- 58% have seen or heard information / publicity on help/ support for those struggling to pay their energy bills.
- 36% would turn to family / friends for help / support if they were struggling with their energy bills.
- 46% are aware that they can contact their energy supplier if they are worried about paying their energy bills.
- 20% are aware that suppliers may reassess debt payments for consumers in financial distress.
- 45% are unaware that their energy supplier can provide support for those struggling with energy bills.

### Contact with energy suppliers

- 23% had contacted an energy supplier because they needed advice/ information/support about their bills.
- 26% of gas customers had contacted their supplier about their bills (electricity consumers, 18%).
- 51% were satisfied with the help / support provided by their energy supplier (18% were dissatisfied).
- Not getting any help from energy suppliers when contacted was the main reason for dissatisfaction (66%).

### Switching suppliers

- 56% had switched energy supplier (21% in the last year and 35% more than a year ago).
- 25% had never switched because they believe suppliers are all the same (24% had never thought about it).

### Awareness of different energy schemes and consumer support

- 81% are aware of the Energy Bill Support Scheme.
- 79% are aware of the Pensioner Cost of Living Payment.
- 77% are aware of the Low Income Cost of Living Payment.
- 77% are aware of the Disability Cost of Living Payment.
- 56% are aware of the Energy Price Guarantee (either electricity or gas).
- 93% of those in receipt of scheme payment said that it made a difference to their household.
- 62% say a reduction in price / utility regulation is the single most important thing to help consumers cope.

### Decarbonisation and energy transition

- 23% rate their awareness / understanding of decarbonisation and energy transition as excellent/good.
- 63% are interested in decarbonisation and energy transition.
- 73% say that decarbonisation and energy transition is a priority for them personally (major, 22%; minor, 51%).
- 25% rate their awareness / understanding of the benefits of decarbonisation as excellent/good.
- 31% say cost is the biggest barrier to becoming more engaged in energy transition (lack of information, 24%).
- 58% would like to receive more information on decarbonisation and energy transition.
- 79% support financial incentives to encourage behaviour change.
- 36% support mandatory policies such as no oil boilers or banning diesel vehicles after a certain date.

## Conclusions

The research has found a fuel poverty level of 51% across Northern Ireland households, which is significantly higher than the 34% recorded in similar research undertaken by the Consumer Council in 2022. This increase reflects the financial challenges brought about by the current cost of living crisis.

The survey also profiles those consumers more likely report living in fuel poor households, with these consumers more likely to be: women; older; be living in lower social grade households; have a disability; be living in social housing; be living in households where gas is the main source of heating; be living in semi-detached and terraced properties; have low household incomes; and, to be living in households in receipt of Universal Credit. Those living in fuel poor households are also more likely to report poorer physical and mental health, and to be living in households where mould or damp is present. Taken collectively, this evidence supports the view that those experiencing fuel poverty represent more vulnerable consumers.

It should be of concern that almost half of consumers say they cannot afford to heat their homes due to the cost of energy, with the vast majority having had to cut back on their energy use during winter. Most say they are worried about not being able to pay their energy bills, with more than a quarter of consumers using pre-payment meters not being able to top up their PPM in the last 12 months because they couldn't afford to.

With high levels of concern about the cost of energy, and most struggling to pay their energy bills, it should be of no surprise that a significant number of consumers have had to reduce their use of energy by turning off radiators to save energy, heat their homes for fewer hours than they need, and wear extra layers of clothing. Almost one in five say they have had to prioritise eating instead of heating.

Although most consumers are aware of information / publicity on help/ support for those struggling to pay their energy bills, less than half are aware that they can contact their energy supplier if they are worried about paying their energy bills. Moreover, among those who had contacted their energy provider, just over half were satisfied with the outcome, with limited awareness among consumers that their energy suppliers may reassess debt payments for those in financial distress. This suggests that there is a real need for information to be made available to help support those are struggling with their energy bills, and in particular to those consumers who are vulnerable. It is however, encouraging to find that most consumers are aware of the different energy support schemes.

Finally, the survey found that consumer awareness and understanding of the benefits of decarbonisation and energy transition is relatively low, albeit most are interested, and see it as a priority. Consumers say that cost and lack of information are the most common barriers to them becoming more engaged with energy transition, with most consumers wanting more information on the subject. In terms of encouraging consumers to become more engaged with energy transition and decarbonisation, most support making financial incentives available to motivate behaviour change.

## 1. Introduction

In January 2023, The Northern Ireland Consumer Council commissioned Social Market Research (SMR) to undertake quantitative research on the impact of the energy crisis on affordability and the impact of energy transition on consumers. The research builds upon previous research undertaken by the Consumer Council in 2022 particularly in terms of generating an up to date estimate of the prevalence of fuel poverty in Northern Ireland.

### 1.1 Context and strategic drivers

The Consumer Council is concerned about the impact of the current energy crisis and wants to better understand the impact this is having on consumers, and in particular consumers who are vulnerable. The Consumer Council is also interested in issues associated with energy transition among Northern Ireland consumers. Specific drivers for the research include:

- The Northern Ireland House Conditions Survey (HCS) 2016<sup>1</sup> estimated that approximately 160,000 (22%) households in Northern Ireland are in fuel poverty, which is one of the highest rates in Europe and more than twice the fuel poverty rate of England (10%).
- The Consumer Council carried out quantitative research in early 2022 which provided an updated estimated percentage of households in fuel poverty<sup>2</sup>, and also explored the types of energy efficiency measures installed (including insulation, age and condition of boilers, etc.).
- The energy crisis has caused energy prices to increase significantly throughout 2021 and 2022, with gas and electricity prices around three times what they were before Covid-19. Consumers are currently protected against these high costs with the introduction of the Energy Price Guarantee (EPG), which was due to end in April 2023 but has now been extended. Even with the EPG and other supports, consumers are paying bills significantly higher than they did in previous years.
- It is important to understand the impact of the energy crisis on consumers' ability to afford their energy costs, and the ways that they are coping.
- The methodology used by the Consumer Council to measure the extent of fuel poverty is not the same as the official Northern Ireland House Condition survey figures and is not directly comparable. This research aims to compliment the official research and provide an estimate of consumers' experiences during the current energy crisis.

### 1.2 Research objectives

The research aim is to gather insight on the impact of the energy crisis on affordability, how consumers are coping, and the impact of the different government support packages. It is anticipated that the research may help to identify groups of consumers that are struggling more than others or who are currently missing out on current support packages and need further support.

The research builds upon previous research carried out by the Consumer Council in early 2022 which estimated that 34% of Northern Ireland households are living in fuel poverty. A key element of this current research is to provide an updated measure of the prevalence of fuel poverty in N Ireland. Furthermore, the survey also seeks to quantify the consumer impact of the energy transition, looking into the opportunities, costs and the potential social implications on Northern Ireland consumers, as we strive to meet net zero targets.

Within the overall aims of the survey, there were a number of attendant objectives:

- To understand the impact of the energy crisis on consumers' ability to afford their energy costs;
- To investigate all aspects of coping mechanisms i.e. reducing consumption, rationing fuel and self-disconnection;

<sup>1</sup> The Northern Ireland House Conditions Survey (HCS) 2016 <https://www.nihe.gov.uk/Documents/Research/HCS-2016-Main-Reports/HCS-Main-Report-2016.aspx>

<sup>2</sup> A Review of Fuel Poverty Levels in Northern Ireland (May 2022) [https://www.consumerCouncil.org.uk/sites/default/files/2022-10/Research\\_Report\\_Review\\_of\\_Fuel\\_Poverty\\_Levels\\_in\\_NI\\_1.pdf](https://www.consumerCouncil.org.uk/sites/default/files/2022-10/Research_Report_Review_of_Fuel_Poverty_Levels_in_NI_1.pdf)

- To explore the reasons why customers run out of home heating oil / electricity / natural gas, for how long and how frequently this happens;
- To investigate how the existing government support packages have helped consumers manage their energy costs;
- To provide an updated estimate of the extent of fuel poverty in Northern Ireland in Winter 2022/23;
- To determine overall awareness of help and support available to the fuel poor; and
- To inform policy by considering what improvements are needed to drastically reduce the number of households in fuel poverty and pinpoint what improvements are better needed to help support those in fuel poverty;
- To understand consumers experience of low carbon technology, the installation process and the impact on energy affordability;
- To carry out research into the opportunities, costs, and social impacts of energy transition on Northern Ireland consumers.

### 1.3 Research methodology

The research was based on large-scale quantitative survey of 1007 energy consumers in Northern Ireland. Data was collected using an online methodology. The research was conducted in line with ISO20252 of which Social Market Research is fully accredited. A copy of the survey questionnaire is included as Appendix 1. Fieldwork on the project was completed in February and March 2023.

#### 1.3.1 Survey of energy consumers

Table 1.1 presents an overview of the achieved sample profile based on 1007 Northern Ireland consumers.

		%	N
Sex	Male	49	489
	Female	51	518
Age	18-34	28	285
	35-59	44	444
	60+	28	278
SEG <sup>3</sup>	ABC1	46	467
	C2DE	54	540
Local government district	Antrim and Newtownabbey Borough Council	8	81
	Ards and North Down	9	91
	Armagh City, Banbridge and Craigavon	10	101
	Belfast	18	181
	Causeway Coast and Glens	8	80
	Derry and Strabane	8	80
	Fermanagh and Omagh	6	60
	Lisburn and Castlereagh	8	80
	Mid and East Antrim	7	71
	Mid Ulster	8	80
	Newry, Mourne and Down	10	101
Main fuel to heat home	Oil	54	539
	Gas	33	329
	Other	13	139
Location	Urban	66	669
	Rural	34	339

<sup>3</sup> Used as an indicator of social class with ABC1 grades including: higher managerial, administrative or professional; intermediate managerial, administrative or professional; and, supervisory or clerical, junior managerial, administrative or professional. C2DE social grades include: skilled manual workers; semi and unskilled manual workers; and, state pensioners or widows (no other earner), casual or lowest grade workers.

**1.4 Notes on survey reporting**

Please note that due to rounding, row and column totals in tables and figures may not sum to 100. Also, please note that any differences between sample subgroups (e.g. age, gender, social class etc.) alluded to in the report commentary are statistically significant to at least the 95% confidence level. The use of [-] within tables denotes less than 1%. Prior to analysis the data has been weighted by age, sex, social class, and local government district, and in line with NI census estimates.

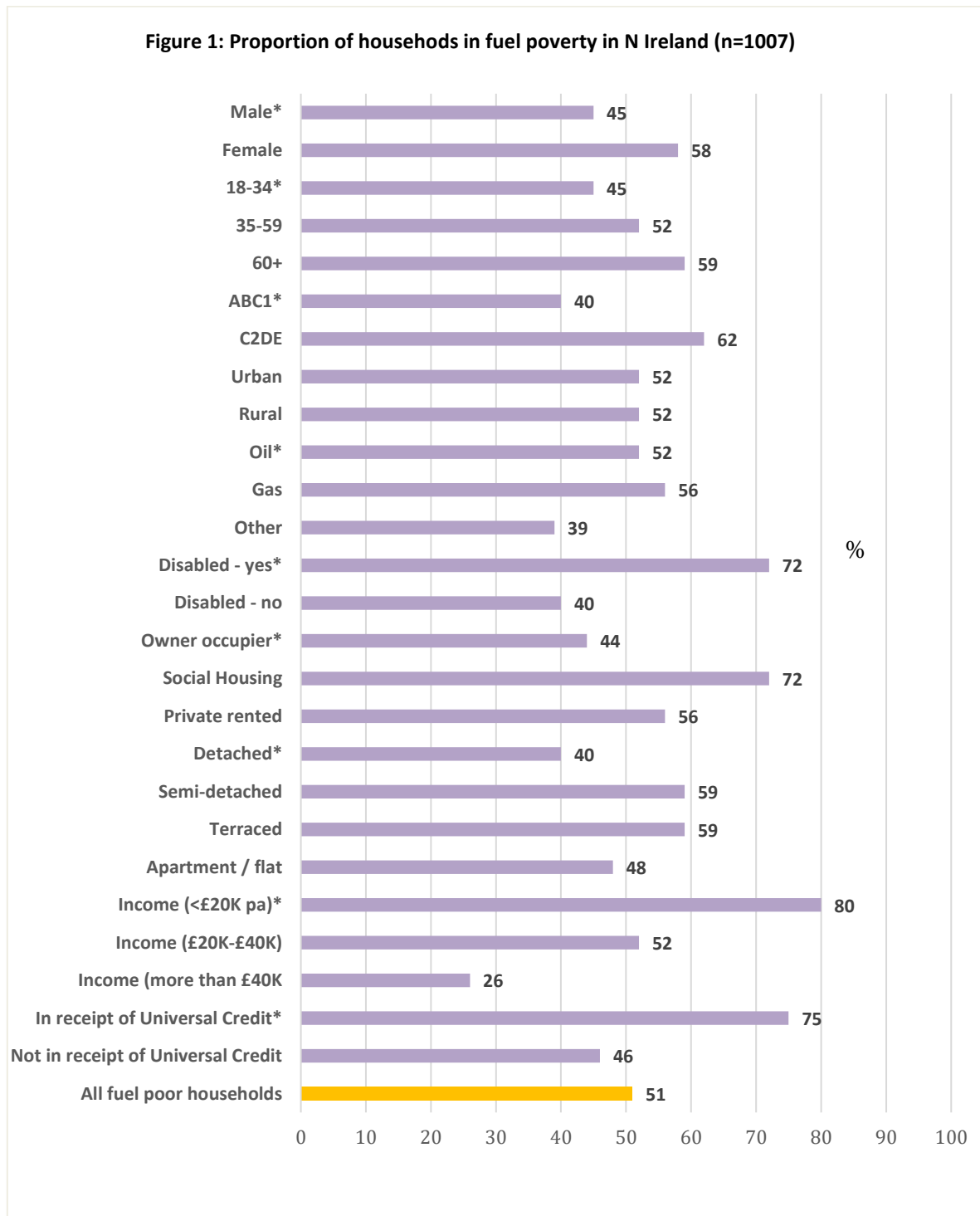


2. Survey Findings

2.1 Prevalence of fuel poverty

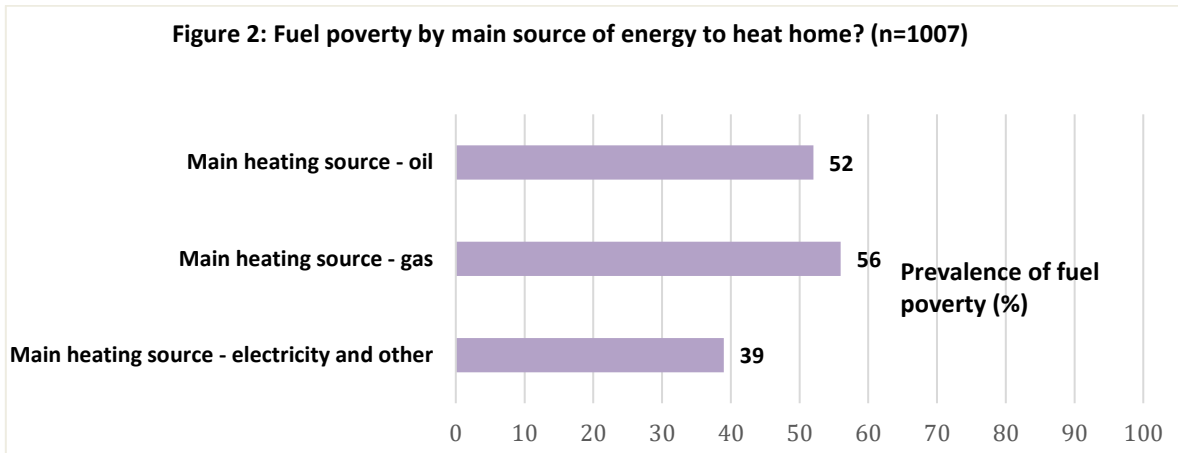
A key objective of this research is to provide a measure of the extent of fuel poverty among Northern Ireland consumers. For the purposes of the research fuel poverty has been defined as a household spending more than 10% of its income (take home wages, benefits, pension etc.) on energy bills.

Based on this definition it is estimated that 51% of households in Northern Ireland are living in fuel poverty. Note that Figure 1 highlights (using asterisk) statistically significant differences (e.g. a significantly higher proportion of those with a household income of less than £20K per annum [80%] are defined as living in fuel poverty compared with those with household incomes of more than £40K, 26%).



2.2.1 Fuel poverty and main source of heat in home

Figure 2 shows that the highest level of fuel poverty was recorded in homes where gas is the main heating source (56%), with households where oil is the main heating source recording a fuel poverty level of 52%. Fuel poverty levels were lowest in homes where the main fuel source was something other than gas or oil (39%).



2.2.2 Fuel poverty and self-reported health status

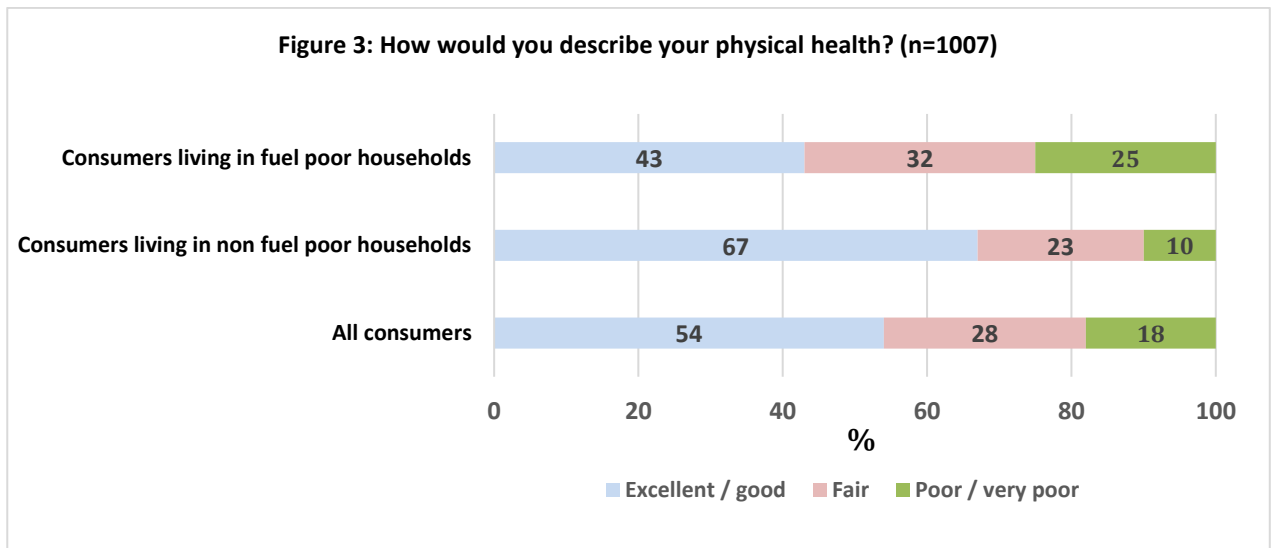
The survey also explored the association between fuel poverty and health status.

**Physical health**

Respondents were asked to describe their physical health.

Figure 3 shows that 54% of all respondents said their physical health was excellent or good, 28% said their physical health was fair, and 18% described their physical health as poor.

Proportionately more consumers living in fuel poor households described their physical health as poor or very poor (25% vs. 10%).

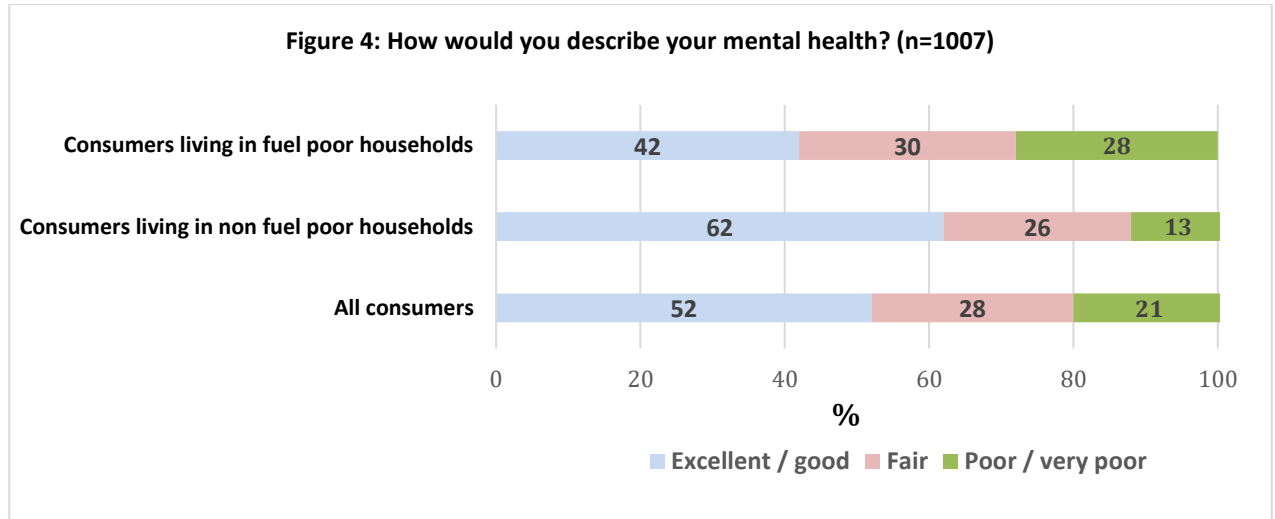


### Mental health

Respondents were asked to describe their mental health.

Figure 4 shows that 52% of respondents reported their mental health was excellent or good, 28% said their mental health was fair, and 21% said their mental health was poor.

Analysis by fuel poor and non-fuel poor households shows that proportionately more consumers living in fuel poor households described their mental health as poor or very poor (28% vs. 13%).

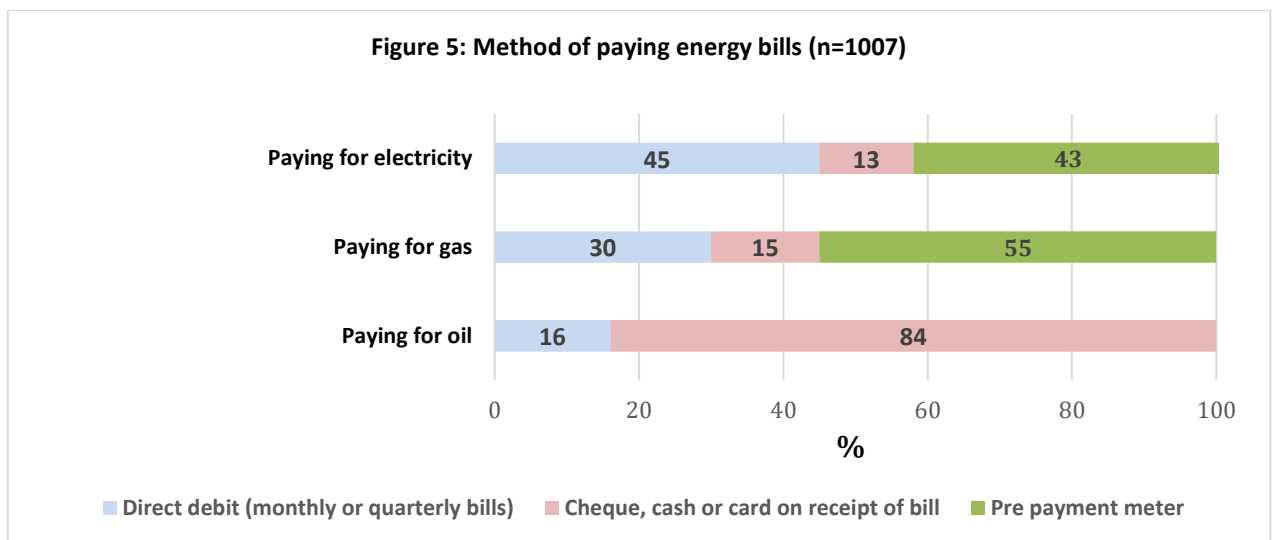


### 2.3 Payment methods for energy

Figure 5 shows that 45% of consumers said they pay for their electricity via direct debit (i.e. monthly or quarterly bills), with 13% paying by cheque, cash or check on receipt of their bill, and 43% paying via a prepayment meter.

Among gas customers, 45% said they pay their bill through direct debit or payment on receipt of bill, with 55% paying via a prepayment meter.

Sixteen percent (16%) who use home heating oil said they pay using direct debit, with most (84%) paying by cheque, cash or card on receipt of their bill.



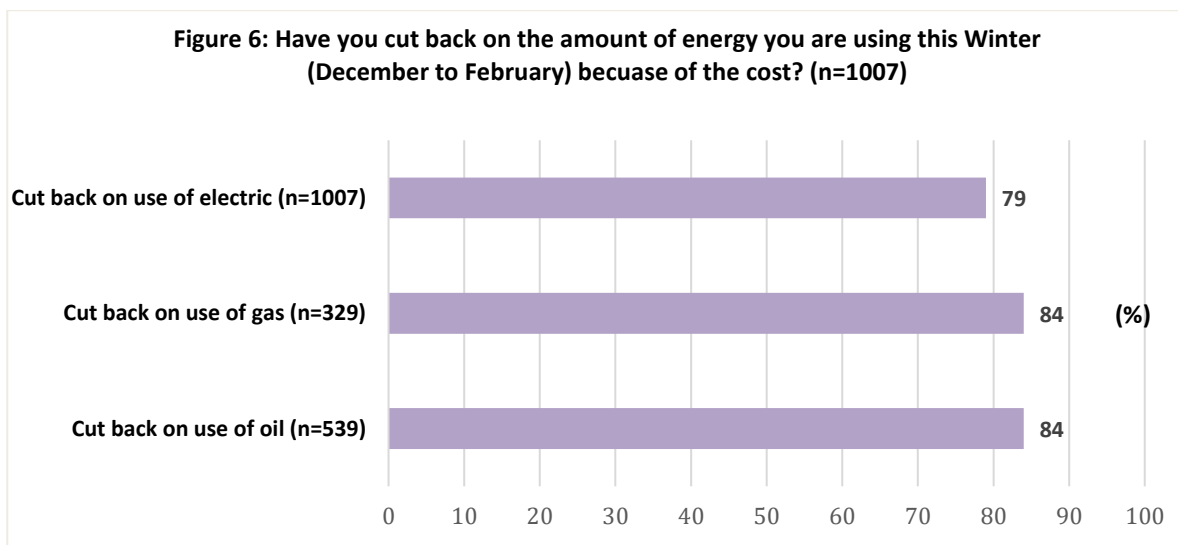
### Method of payment and fuel poverty

Analysis by fuel payment method shows that:

- Consumers with PPMs report a significantly higher level of fuel poverty (61% vs. 44%).
- Consumers with electricity PPMs report a significantly higher level of fuel poverty (64%) compared with those using a credit meter<sup>4</sup> (42%).
- Consumers with gas PPMs report a higher level of fuel poverty (57%) compared with those paying their gas bill via a credit meter (55%) albeit this difference is not statistically significant.

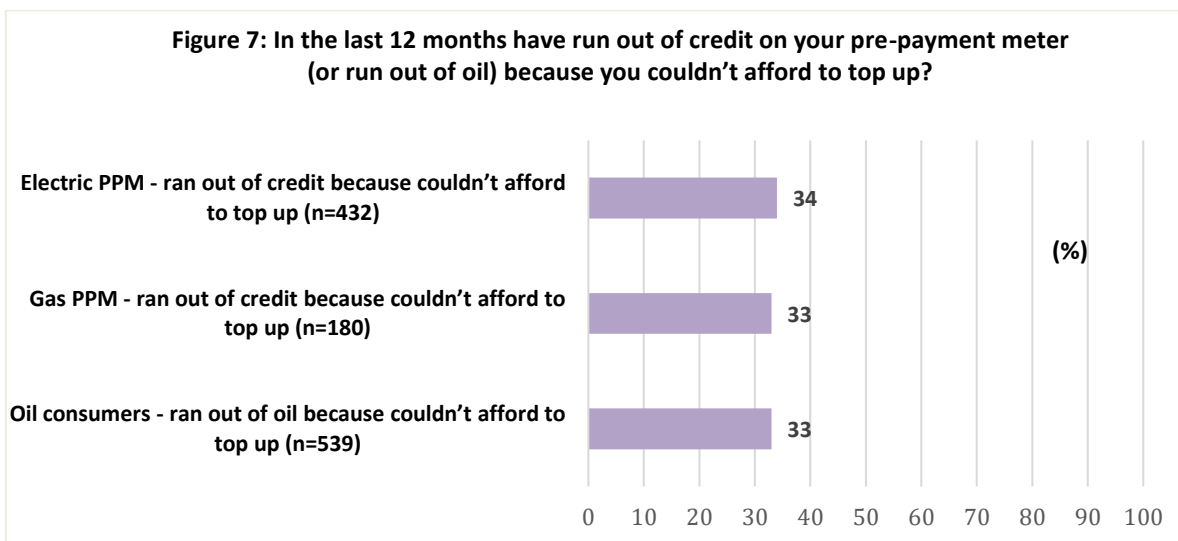
### 2.4 Reducing energy use because of the cost

Figure 6 shows that almost eight out of ten (79%) electricity consumers have cut back on their use of electric, with 84% having cut back on their use of gas and home heating oil.



### 2.5 Running out of fuel because of affordability

Similar numbers of consumers using electric (34%) and gas (33%) pre-payment meters said they had run out of credit on their PPM because they couldn't afford to top up. The proportion of oil consumers unable to refill their tank due to affordability was similar at 33%.



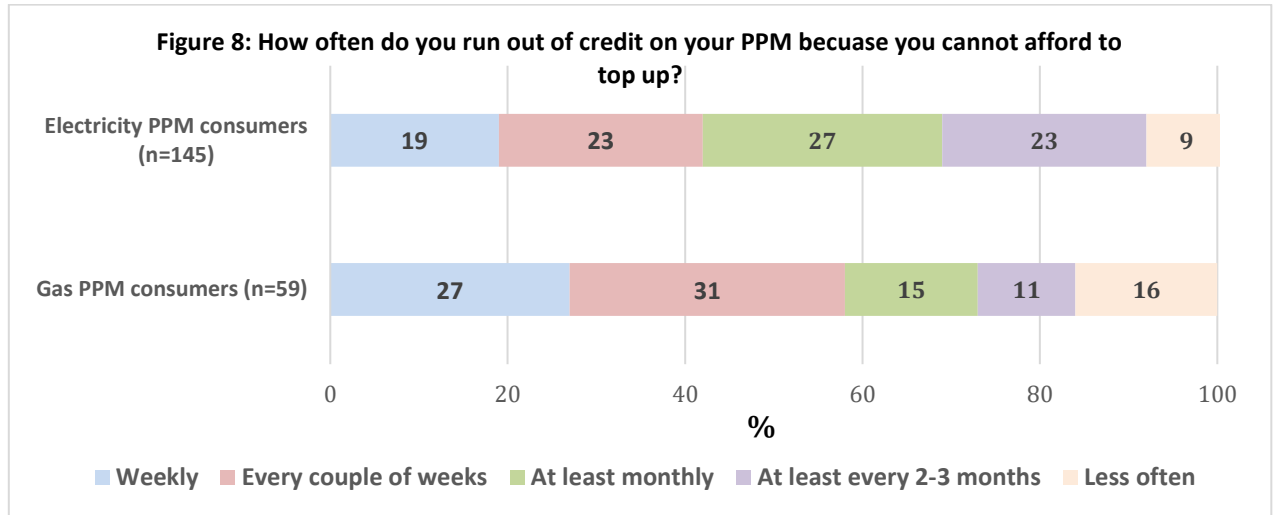
<sup>4</sup> Payment via direct debit or on receipt of bill

**2.5.1 Duration without electricity, gas or oil among those who had run out**

Approximately one in five (19%) consumers running out of credit on their electricity PPM in the last 12 months, did so on a weekly basis, with 27% of PPM gas consumers running out of credit doing so on a weekly basis.

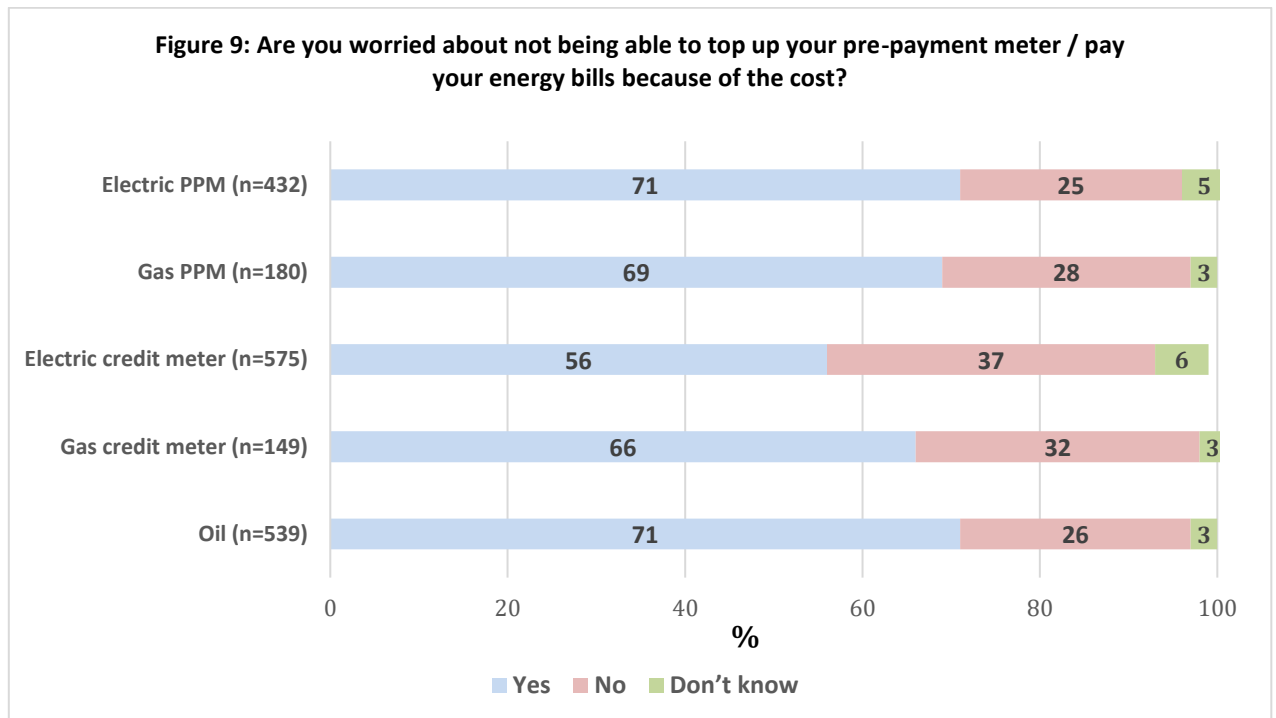
On the last occasion that electric and gas PPM consumers ran out of credit, 26% were without credit on their electric PPM for more than 12 hours, with 45% of gas consumers without credit on their gas PPM for more than 12 hours.

Among oil customers who had run out of oil in the last 12 months due to affordability, 41% said that on the last occasion they had run out they were without oil for more than week.



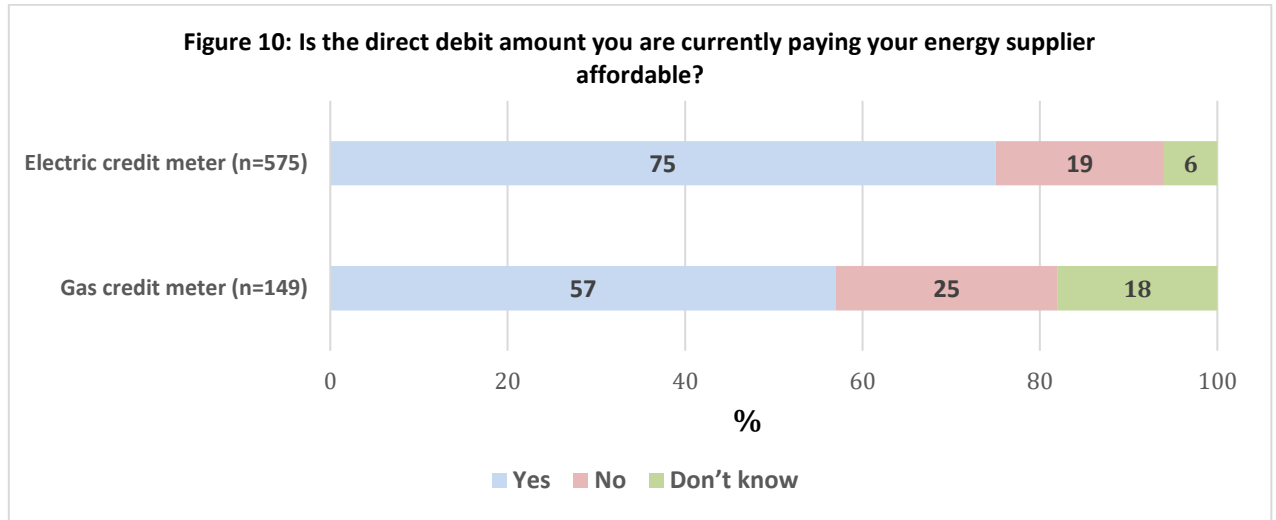
**2.6 Consumer worry about topping up their PPM or paying their energy bills**

Consumers were asked to say if they are worried about not being able to pay their energy bills. Regardless of payment method, most consumers said they are worried, with electricity PPM and oil consumers most likely (71%) to be worried, with electricity credit meter customers least likely to be worried (56%).



**2.7 Credit meter consumers and affordability**

Credit meter customers were asked to say if the amount they are paying in direct debit to their energy supplier is affordable, with 75% of electricity credit meter consumers, and 57% of gas credit meter consumers, saying their current direct debit is affordable.



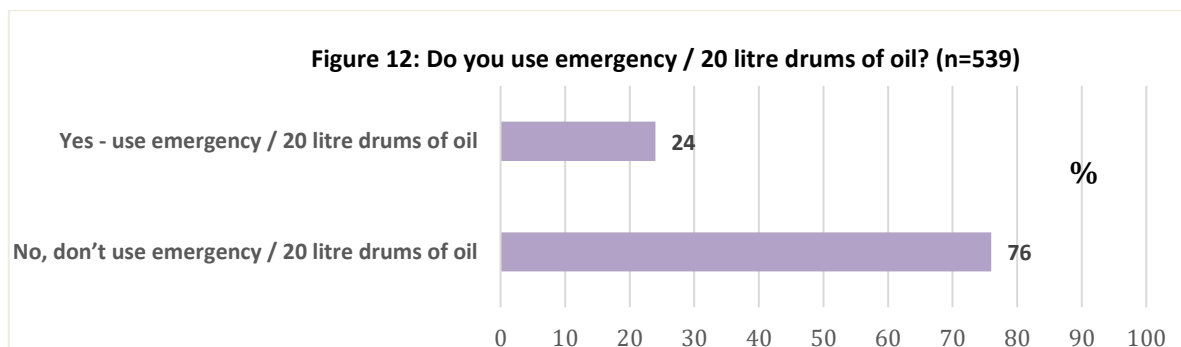
**2.8 Home heating oil customers shopping around**

Almost seven out of ten (68%) home heating oil consumers said they shop around when buying oil, with 4% saying they are in an oil buying club.



**12.8.1 Use of emergency 20 litre drums of oil**

Among all consumers who use oil to heat their homes, approximately one quarter (24%) said they use emergency 20 litre drums of oil.

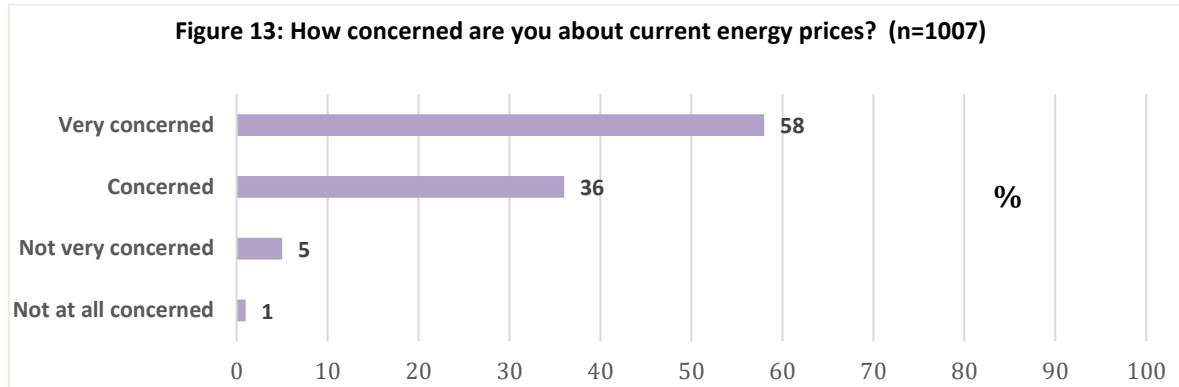


## 2.9 Energy prices

### 2.9.1 Concern about Energy Prices

Consumers were asked about their household energy bills compared with a year ago.

Figure 13 shows that more than nine out of ten (94%) consumers said they are concerned about current energy prices (very concerned, 58%: concerned, 36%). Just 6% say they are not concerned (not very concerned, 5%: not at all concerned, 1%).



#### Statistically significant differences between consumer groups:

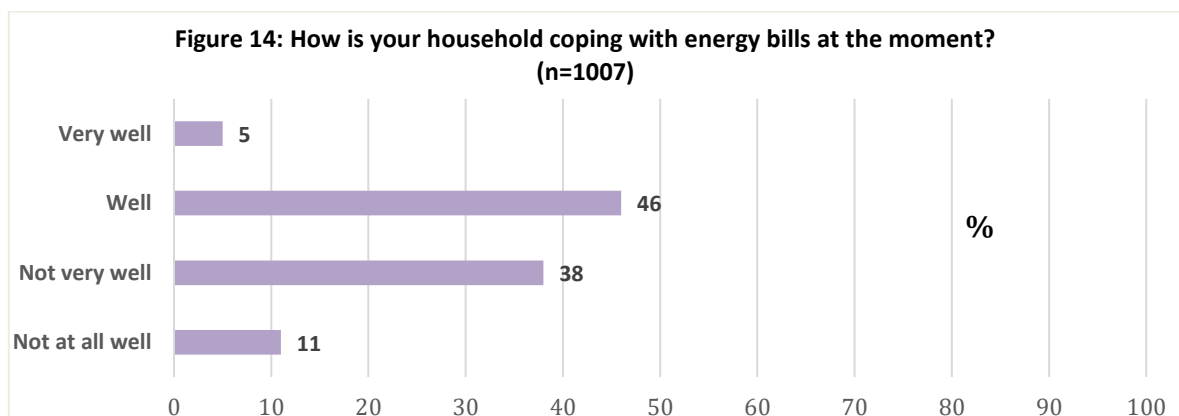
Those more likely to say they are concerned about current energy prices included:

- Women (96% vs. 91%)
- Households defined as being fuel poor (96% vs. 92%)

### 2.9.2 Coping with energy bills at the moment

Consumers were asked about how their household is coping with energy bills at the moment, with approximately half (51%) saying they are coping well (very well, 5%: well, 46%).

Just under half (49%) said they are not coping well (not very well, 38%: not at all well, 11%).



#### Statistically significant differences between consumer groups:

Those *less* likely to say they are coping with energy bills at the moment included:

- Women (48% vs. 54%)
- Consumers aged 35-59 (18-34, 50%: 35-59, 45%: 60+, 62%)
- Those in C2DE social classes (42% vs. ABC1, 62%)
- Consumers with a disability (39% vs. 58%)

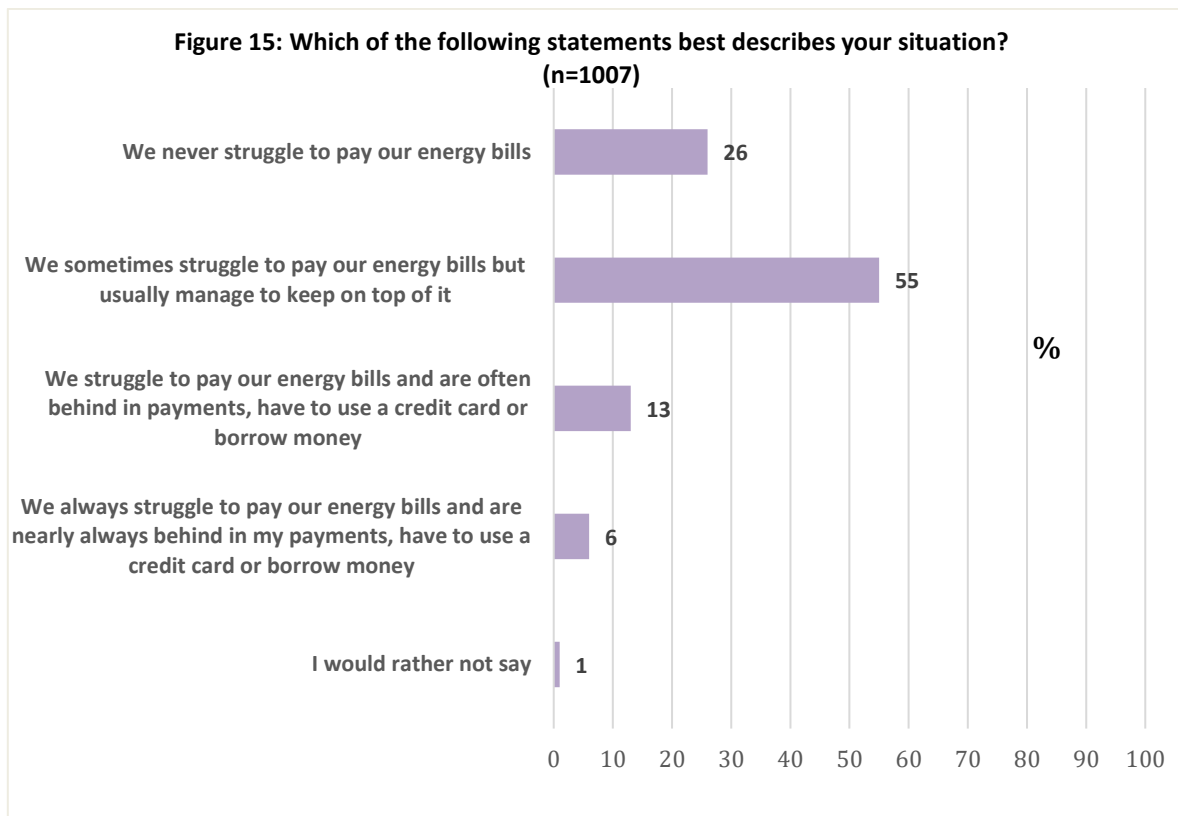
- Those with dependents under the age of 18 (45% vs. 55%)
- Lower income consumers (<=£20K, 29%; 20K-£40K, 53%; £40K+, 66%)
- Those living in households in receipt of Universal Credit (32% vs. 55%)
- Economically inactive consumers (43% vs. 56%)
- Those living in social housing (owner occupiers, 62%; social, 29%; private rented, 38%)
- Those living in terraced housing (detached, 65%; semi-detached, 47%; terraced, 39%; apartment, 44%)
- Those living in single adult households (single, 40%; two adults, 54%; 3+ adults, 55%)
- Those who have sought debt advice (25% vs. 55%)
- Those using foodbanks (19% vs. 54%)
- Those who describe their physical health as poor (excellent /good, 60%; fair, 49%; poor, 28%)
- Those who describe their mental health as poor (excellent /good, 67%; fair, 43%; poor, 25%)
- Consumers living in fuel poor households (38% vs. 64%)
- Consumers heating their homes with fuels other than gas or oil (oil, 52%; gas, 55%; other, 40%)
- Those living in Fermanagh and Omagh (38%) compared to an average of 51% for all areas
- Those living in urban areas (49% vs. 56%)

### 2.9.3 Paying Household Energy Bills

Consumers were asked about how their household financial situation is affected by their energy bills.

Although approximately one in five (26%) consumers said they never struggle to pay their energy bills, more than half (55%) said they sometimes struggle, with 13% often struggling and 6% always struggling to pay their energy bills.

The number of consumers who said they struggle to some degree (sometimes, often or always) to pay their energy bills was 74%.



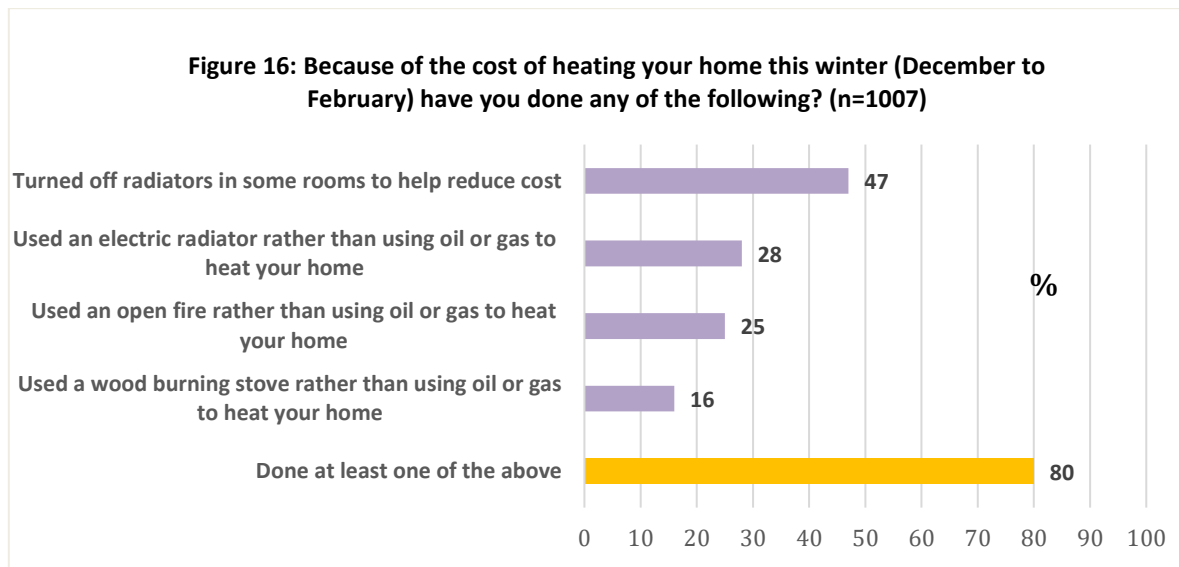


### 2.9.4 Consumer behaviours because of cost of heating the home

Figure 16 shows that because of the cost of heating this winter (December 2022 – February 2023) just under half (47%) of consumers said they had turned off radiators in some rooms to help reduce cost, with 28% using an electric radiator rather than using oil or gas to heat their home.

One in four (25%) consumers said they have used an open fire due to the cost of heating their home, with 16% using a wood burning stove rather than using oil or gas to heat their home.

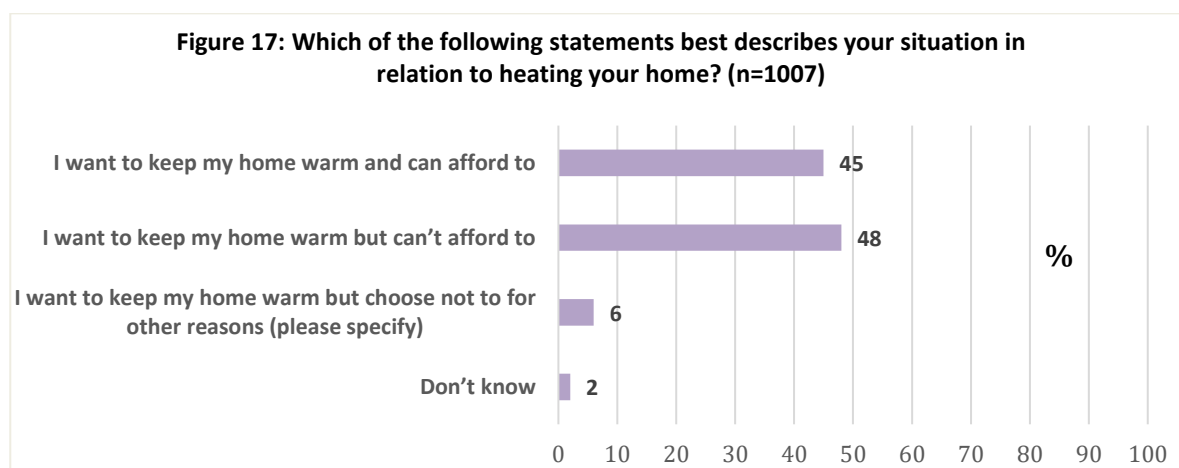
Most consumers (80%) reported doing at least one of the things listed in Figure 16 due to the cost of heating their home this winter.



### 2.9.5 Heating homes and affordability

Figure 17 shows that almost half (48%) of consumers said that they want to keep their home warm but can't afford to, with 45% saying they want to keep their home warm and can afford to.

Six percent say they want to keep their home warm but choose not to, and 2% were undecided.



#### Statistically significant differences between consumer groups:

Those more likely to say they want to keep their home warm but can't afford to included:

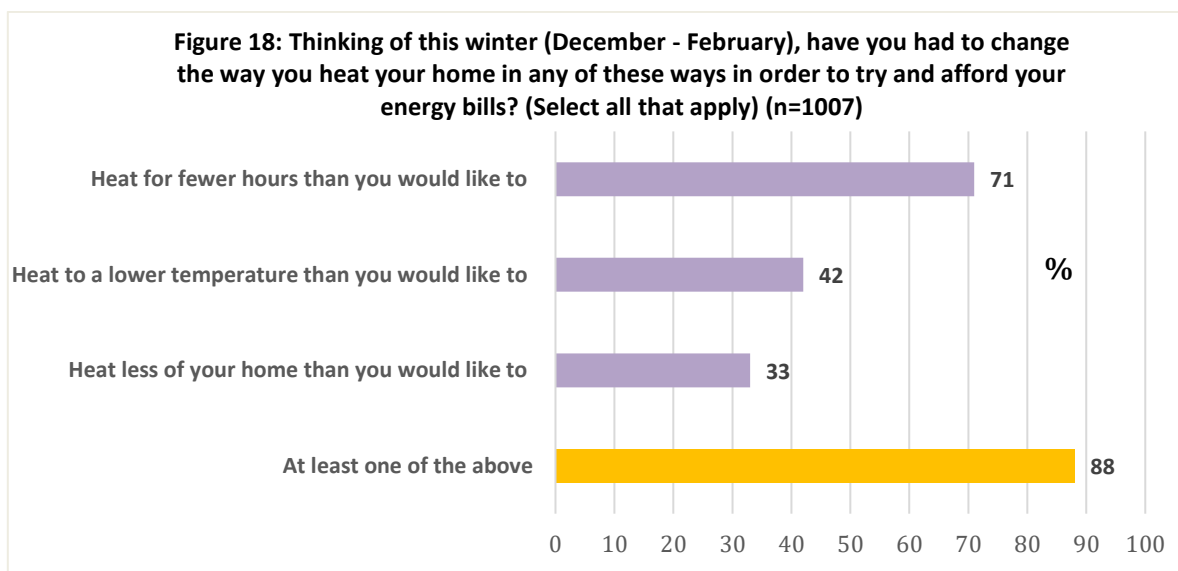
- Women (54% vs. 41%)
- Consumers aged 35-59 (18-34, 50%; 35-59, 55%; 60+, 34%)

- Those in C2DE social classes (57% vs. ABC1, 36%)
- Consumers with a disability (55% vs. 43%)
- Those with dependents under the age of 18 (52% vs. 44%)
  
- Lower income consumers (<=£20K, 67%: 20K-£40K, 49%: £40K+, 32%)
- Those living in households in receipt of Universal Credit (59% vs. 45%)
- Economically inactive consumers (55% vs. 44%)
  
- Those living in the private rented sector (owner occupiers, 39%: social, 60%: private rented, 64%)
- Those living in terraced housing (detached, 33%: semi-detached, 52%: terraced, 61%: flats, 52%)
- Those living in single adult households (single, 63%: two adults, 42%: 3+ adults, 44%)
  
- Those who have sought debt advice (57% vs. 46%)
- Those using foodbanks (70% vs. 45%)
  
- Those who describe their physical health as poor (excellent /good, 36%: fair, 55%: poor, 66%)
- Those who describe their mental health as poor (excellent /good, 39%: fair, 53%: poor, 64%)
  
- Consumers living in fuel poor households (58% vs. 38%)
  
- Those living in Derry and Strabane (54%) compared to an average of 48% for all areas

### 2.9.6 Heating home in different ways to afford energy bills

Consumers were asked to think of last winter (December 2021 – February 2022) and to say if they had to change the way they heated their home in order to try and afford their energy bills.

Figure 18 shows that approximately seven out of ten (71%) consumers said they heated their home for fewer hours than they would have liked, 42% said they had to heat their home to a lower temperature than they would have liked, and 33% said they heated less of their home than they would have liked. Note that most consumers (88%) said they made at least one of changes listed in Figure 18.

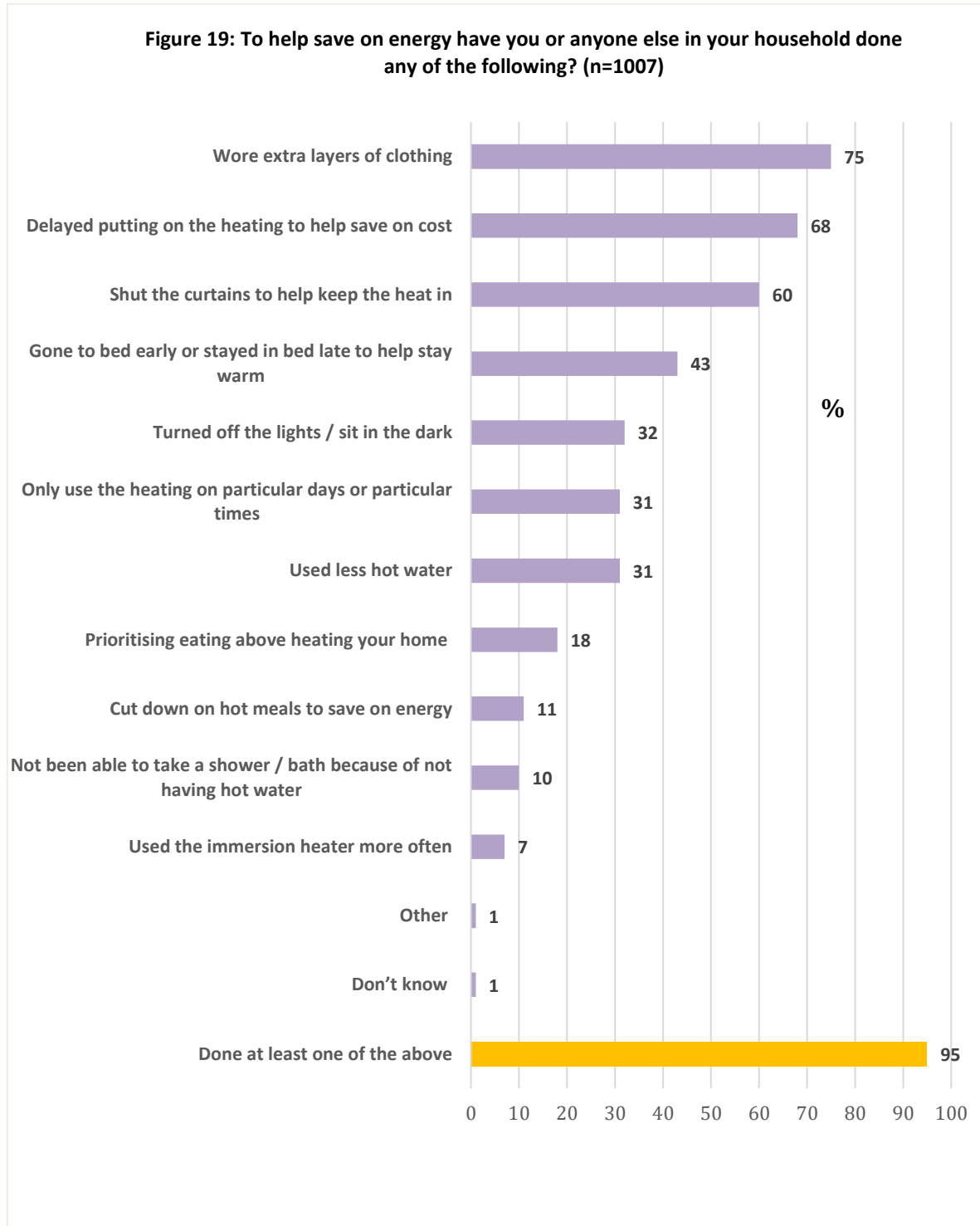


2.9.7 Actions to help save energy

Consumers were asked if they or others in their household had done a range of things to help save on energy.

Figure 19 shows that the most common things that consumers had done to save on energy included: wearing extra layers of clothing (75%); delaying putting on the heating to help save on cost (68%); shutting the curtains to keep the heat in (60%); and going to bed early or staying in bed late to help keep warm (43%).

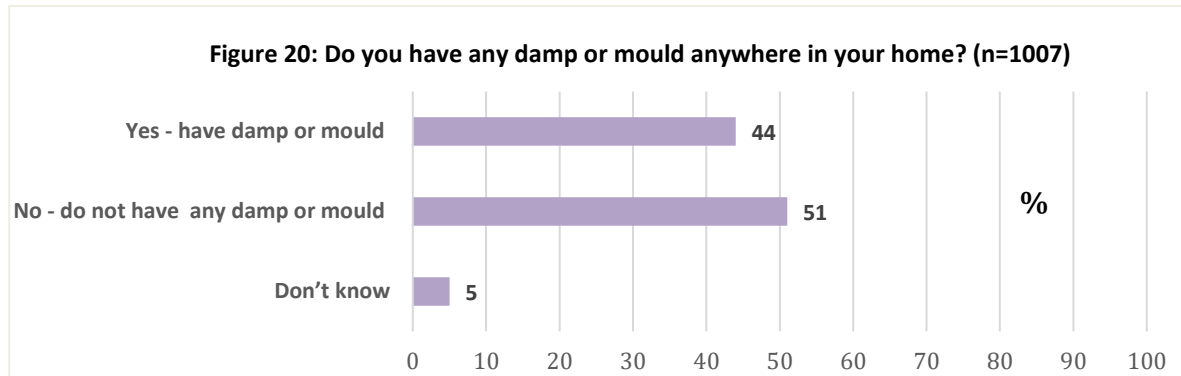
Relatively fewer consumers said they had: used the immersion heater more often (7%); and, had not being able to take a shower or bath because of not having hot water (10%).



## 2.10 Damp or mould and ambient temperature of homes

### 2.10.1 Prevalence of damp or mould

Forty four percent (44%) of consumers said they have damp or mould somewhere in their home, 51% said they do not, and 5% answered, 'don't know'.



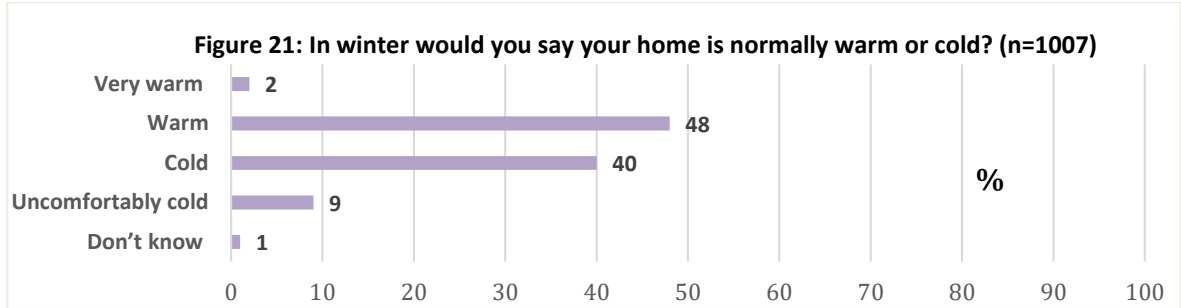
#### Statistically significant differences between consumer groups:

##### Those more likely to say they have damp or mould in their household included:

- Women (47% vs. 40%)
- Consumers aged under 35 (18-34, 52%: 35-59, 47%: 60+, 30%)
- Those in C2DE social classes (50% vs. ABC1, 36%)
- Consumers with a disability (53% vs. 39%)
- Those with dependents under the age of 18 (54% vs. 37%)
  
- Lower income consumers (<=£20K, 51%: 20K-£40K, 46%: £40K+, 36%)
- Those living in households in receipt of Universal Credit (63% vs. 40%)
  
- Those living in the private rented sector (owner occupiers, 37%: social, 52%: private rented, 60%)
- Those living in terraced housing (detached, 37%: semi-detached, 45%: terraced, 52%: flats, 44%)
  
- Those who have sought debt advice (67% vs. 40%)
- Those using foodbanks (70% vs. 41%)
  
- Those who describe their physical health as poor (excellent /good, 40%: fair, 42%: poor, 58%)
- Those who describe their mental health as poor (excellent /good, 36%: fair, 43%: poor, 63%)
  
- Consumers living in fuel poor households (49% vs. 38%)
  
- Those living in Newry, Mourne and Down (55%) compared to an average of 44% for all areas

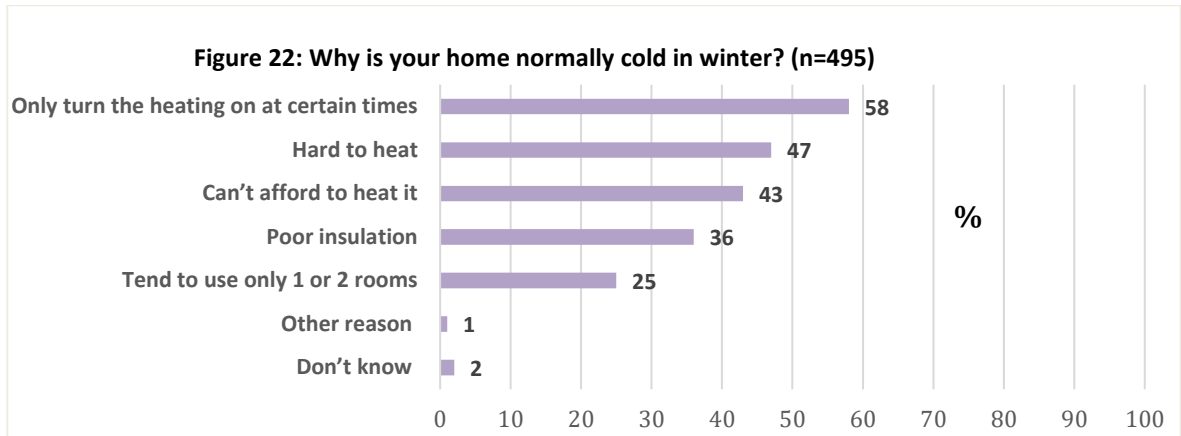
**2.10.2 Ambient temperature of home in winter**

Half (50%) of consumers said that in winter their home is normally warm (very warm, 2%: warm, 48%). Almost half (49%) said their home in winter is cold (cold, 40%: uncomfortably cold, 9%). One percent answered, ‘don’t know’.



**2.10.3 Reasons why home is cold in Winter**

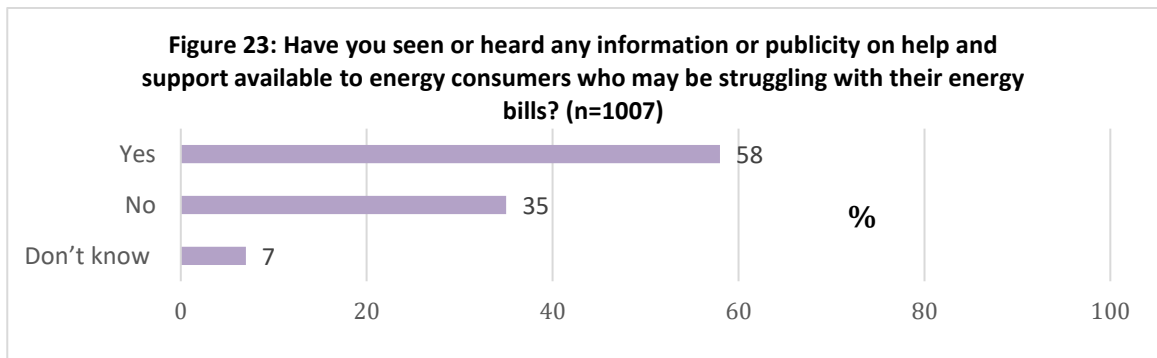
Figure 22 shows that the most common reasons why consumers said their home is cold during winter included: only turning the heating on at certain times (58%); their home being hard to heat (47%); and not being able to afford to heat their home (43%). Approximately one third cited poor insulation (36%), with 25% saying they tend to use only 1 or 2 rooms and 1% cited other reasons<sup>5</sup>.



**2.11 Awareness of help and support**

**2.11.1 Awareness of information or publicity on help / support available to energy consumers**

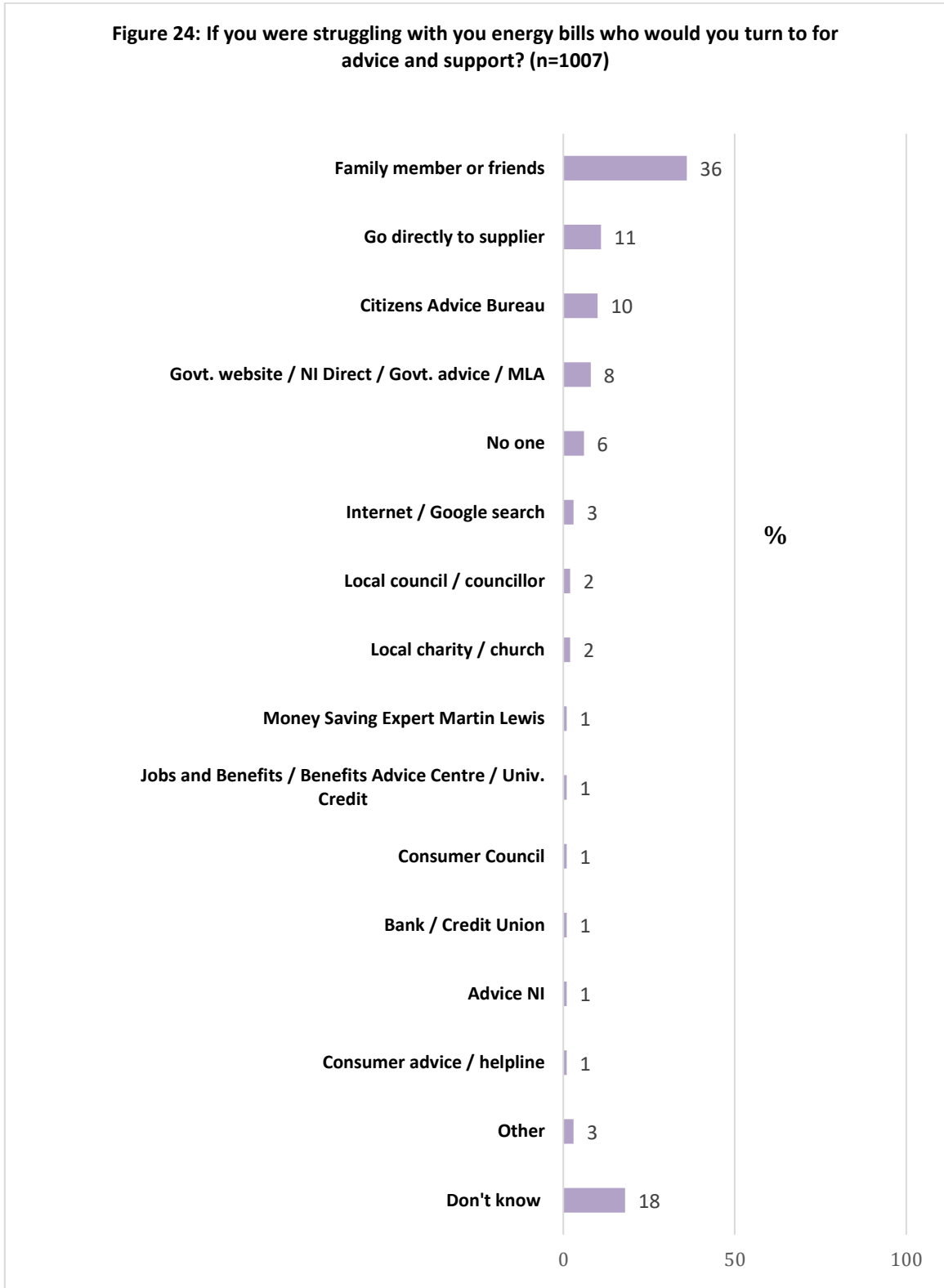
Most consumers (58%) surveyed had seen or heard information or publicity on help and support available to energy consumers who may be struggling with their energy bills.



<sup>5</sup> Included: damp and mould (n=1); poor heating system (n=1); single brick house / no cavity (n=2); difficult to keep heat in (n=1); rented house and don't want to spend money on it updating (n=1); stone walls (n=1); and wood framed windows (n=1).

2.11.2 Organisations consumers would turn to for help and support if struggling with energy bills

Consumers were asked who they would turn to for advice and support if they were struggling with their energy bills. Figure 24 shows that consumers would most commonly turn to family members or friends (36%), with 11% saying they would go direct to their supplier and 10% to the Citizens Advice Bureau<sup>6</sup>.

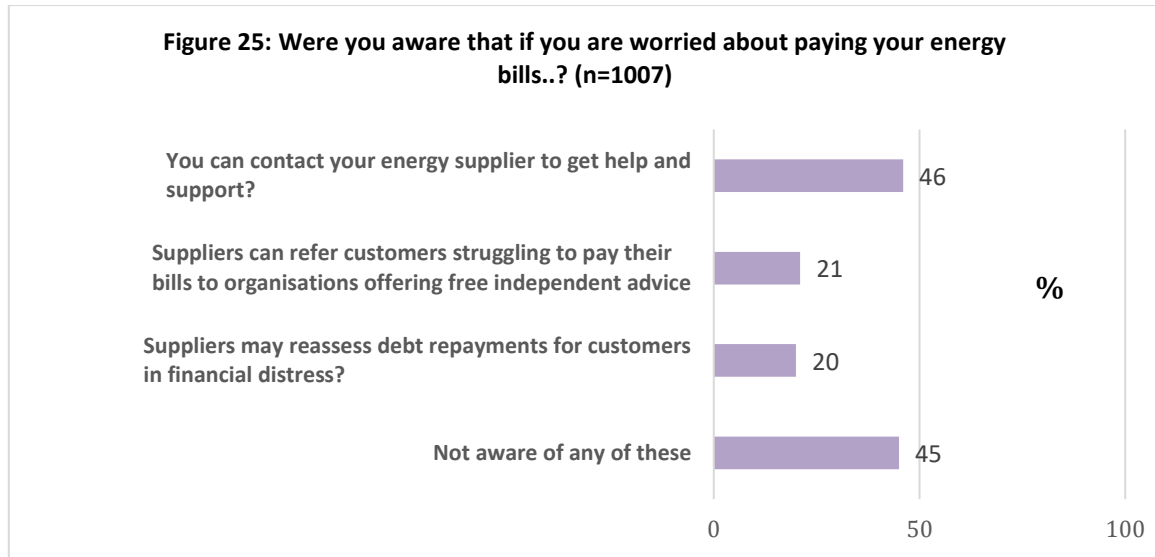


<sup>6</sup> Please note that the Citizens Advice Bureau no longer exists in Northern Ireland but consumers still have a significant level of recall of this former service.

**2.11.3 Awareness of options if worried about paying energy bills**

Consumers were asked if they are aware of different forms of support if they are worried about paying their energy bills. Figure 25 shows that consumers were more likely to be aware that you can contact your energy supplier to get help and support (46%), with 21% aware that suppliers can refer customers struggling to pay their bills to organisations offering free independent advice.

Approximately one in five (20%) consumers were aware that suppliers may reassess debt payments for customers in financial distress. Note that almost half (45%) of all consumers were unaware of any of these options.

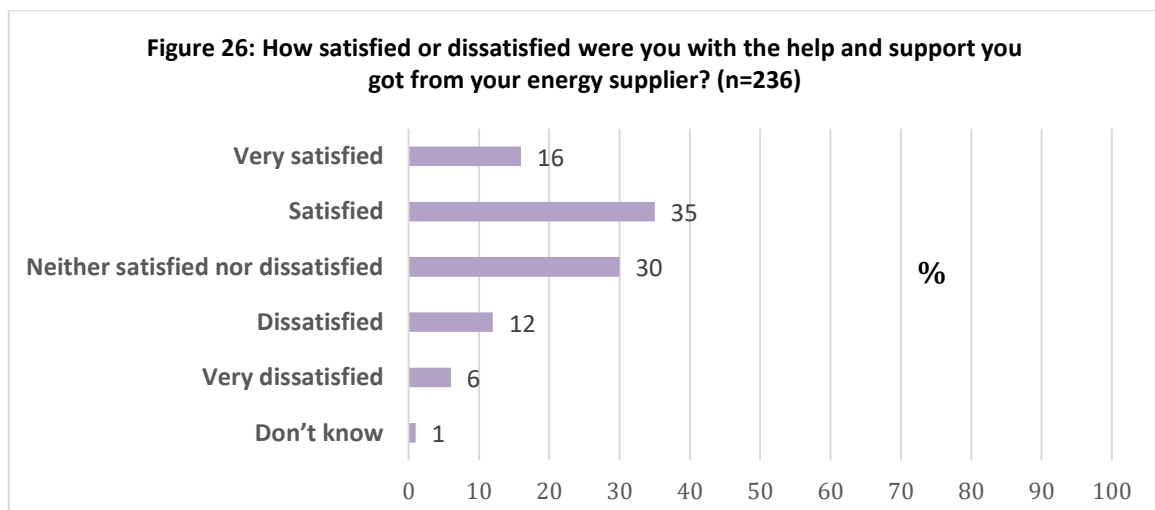


**2.11.4 Contact with electricity / gas suppliers for advice, information or support with energy bills**

Among all consumers, 23% had contacted their electricity or gas supplier because they needed advice, information or support in relation to their energy bills (26% of gas consumers had contacted their gas supplier and 18% had contacted their electricity supplier).

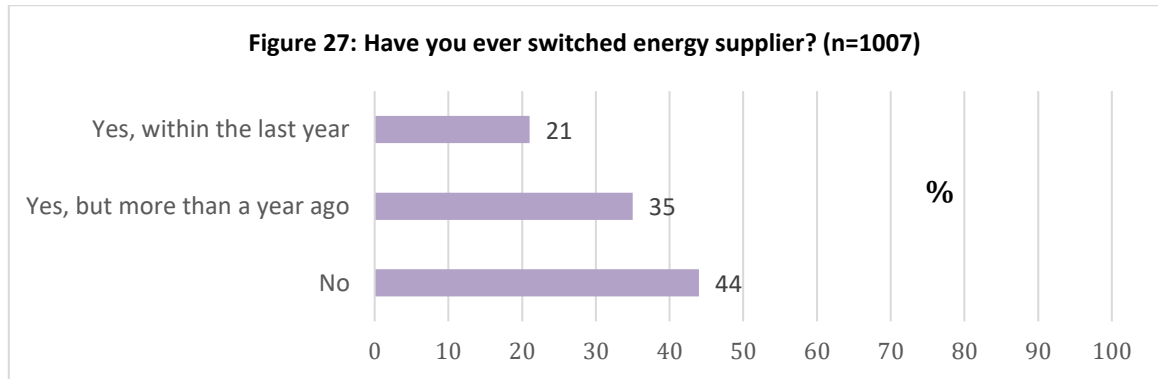
Among those who had contacted their electricity or gas supplier (n=236), 51% were satisfied with the help and support they got (very satisfied, 16%: satisfied, 35%). Thirty percent (30%) were neither satisfied nor dissatisfied, and 18% were dissatisfied (dissatisfied, 12%: very dissatisfied, 6%). One percent answered, 'don't know'.

The main reason for dissatisfaction was that consumers didn't get any help from their supplier (66%), with 14% commenting on poor service and it being difficult to get through. Other reasons for dissatisfaction included: monetary offer was withdrawn (n=1); and the energy supplier wouldn't amend a direct debit (n=4).



2.11.5 Switching energy suppliers

Most consumers (56%) said that they have switched energy supplier, with 21% having switched in the last year, and 35% switching more than a year ago.



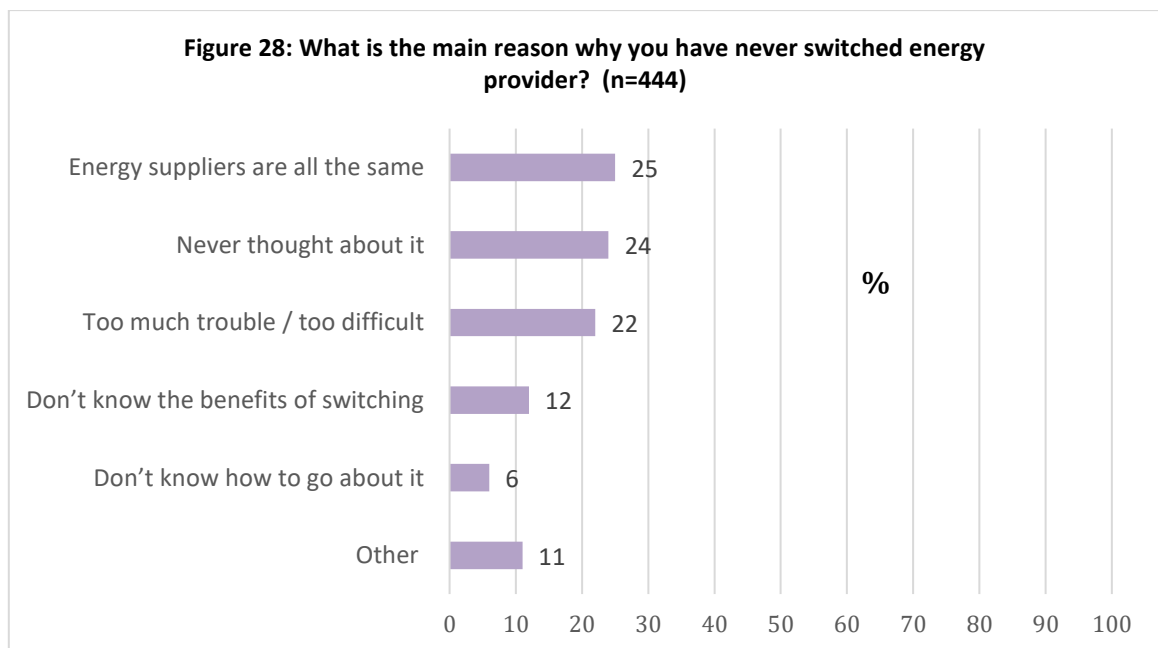
Statistically significant differences between consumer groups:

Customers *more* likely to have switched energy supplier in the last year included:

- Women (24% vs. 19%)
- ABC1 social grades (26% vs. C2DE, 18%)
- Higher income consumers (<=£20K, 18%; 20K-£40K, 19%; £40K+, 27%)
- Consumers with a disability (26% vs. 19%)
- Those living in households in receipt of Universal Credit (27% vs. 20%)
- Those living in households using foodbanks (37% vs. 20%)
- Consumers in Derry and Strabane (36%) compared to an average of 21% for all areas

2.11.6 Reasons never switched energy supplier

The most common reasons why consumers had not switched energy provider included: a view that energy suppliers are all the same (25%); never having thought about it (24%); and switching being too much trouble or too difficult (22%). Approximately one in ten (12%) said they are unaware of the benefits of switching with 6% saying they don't know how to go about switching.





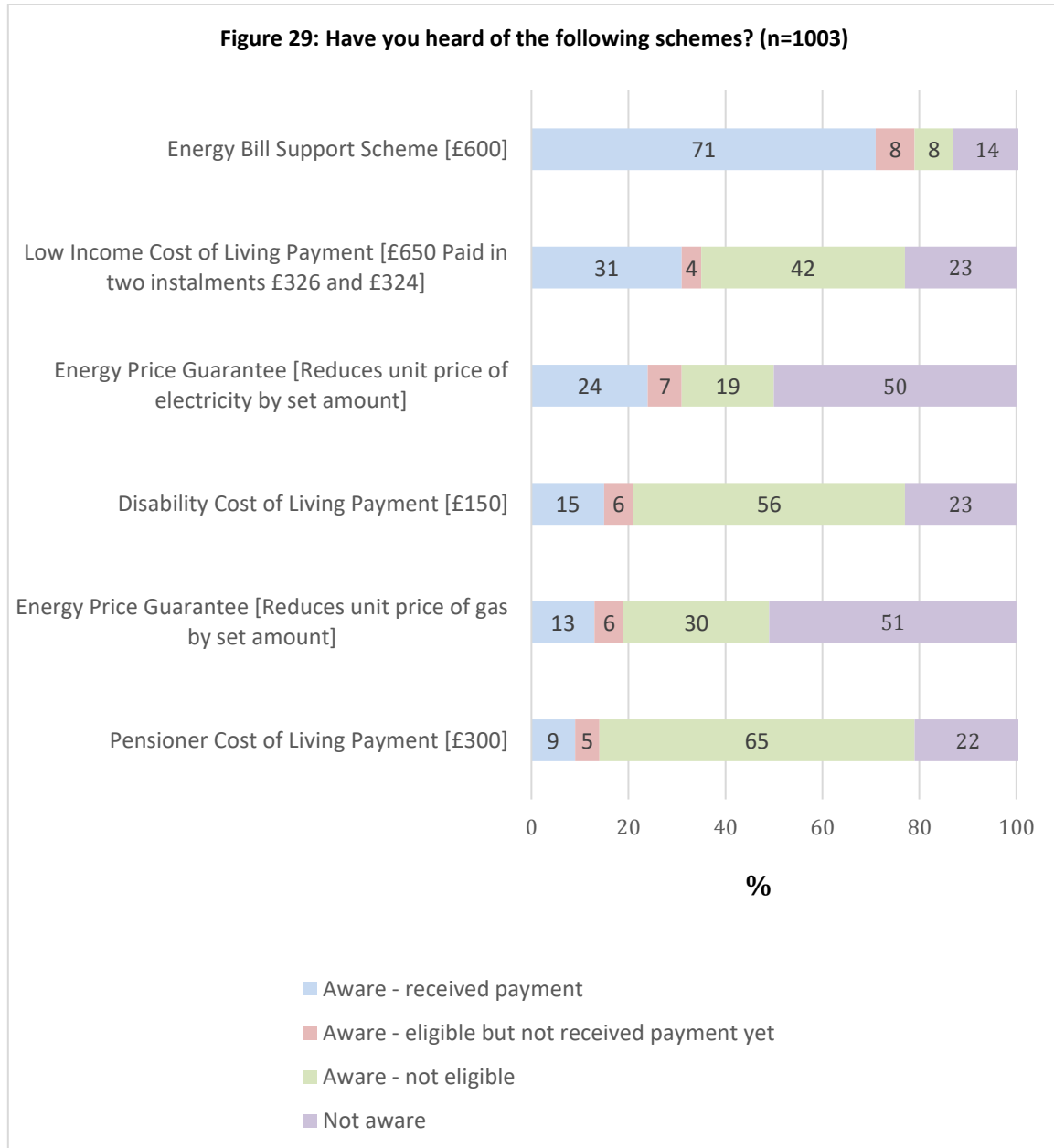
**2.12 Awareness of different energy schemes**

Respondents were asked if they had heard of different energy schemes available to consumers.

At the time of the survey, most consumers were aware of the Energy Bill Support Scheme with 71% having received the £600 payment and 8% waiting to receive the £600 payment. Eight percent said they are aware of the scheme but are ineligible with 14% unaware of the scheme.

Awareness of the other schemes was relatively lower: Low Income Cost of Living Payment (77%); Energy Price Guarantee (electricity, 50%; gas, 49%; either gas or electricity, 56%); Disability Cost of Living Payment (77%); Energy Price Guarantee (49%); and, the Pensioner Cost of Living Payment (79%).

Note that 95% of consumers were aware of at least one of the schemes listed in Figure 29.

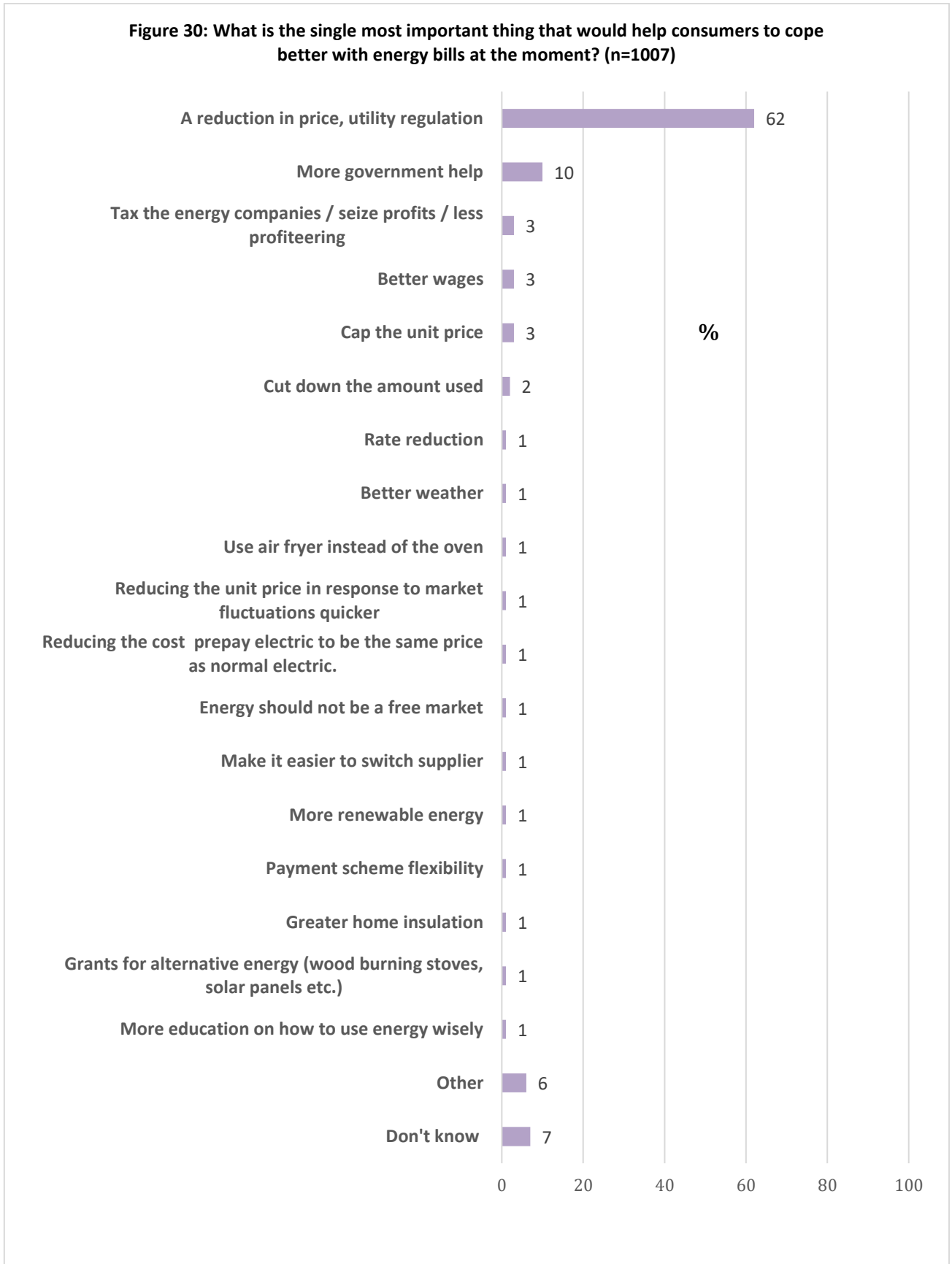


**2.12.1 Energy Support Schemes Making a Difference**

The overwhelming majority of consumers who availed of the various schemes said that they made a difference to their household, with 40% saying they were a big help and 53% saying they helped a little.

2.13 Single most important thing that would help consumers cope better with energy bills

Consumers were asked to list the **single most important thing** that would help consumers to cope better with energy bills at the moment, with most suggesting a price reduction / utility regulation (62%). Ten percent of consumers called for more government help, with taxation on energy companies suggested by 3%.

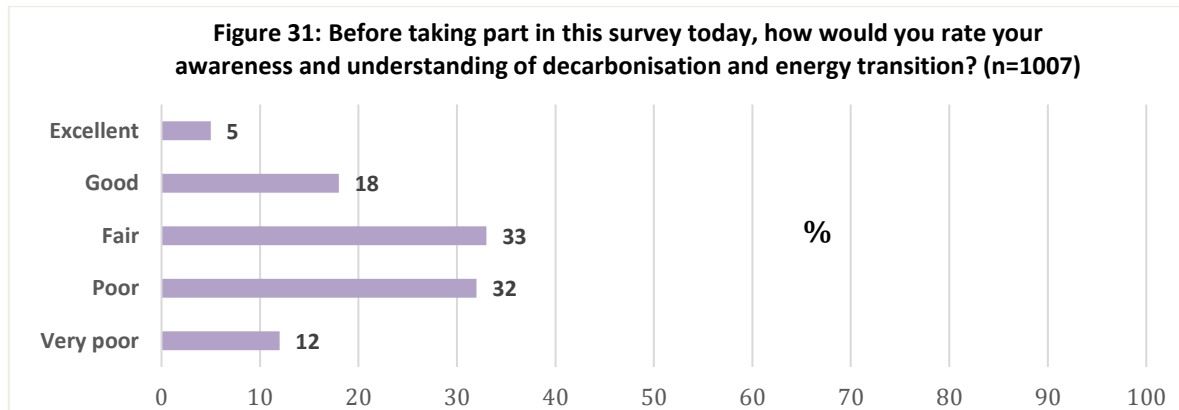


## 2.14 Decarbonisation and Energy Transition

Decarbonisation and energy transition is the process of replacing fossil fuels (e.g. oil and coal) with low carbon energy sources (e.g. solar, wind, renewable energy etc.). Northern Ireland is committed to having net zero carbon emissions by 2050. We will reach net zero when the amount of greenhouse gas we add to the atmosphere is no more than the amount we take away.

### 2.14.1 Awareness and understanding of decarbonisation and energy transition

Figure 31 shows that less than a quarter (23%) of consumers rated their awareness and understanding of decarbonisation and energy transition as either excellent (5%) or good (18%), with 33% self-rating as fair and 44% as either poor (32%) or very poor (12%).



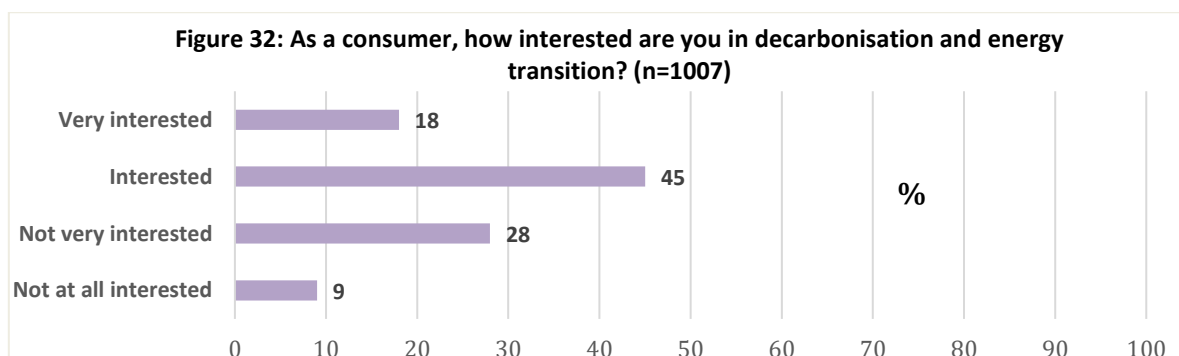
#### Statistically significant differences between consumer groups:

Those more likely to rate their awareness and understanding of decarbonisation and energy transition as either excellent or good included:

- Men (34% vs. 12%)
- Consumers aged under 60 (18-34, 27%; 35-59, 26%; 60+, 15%)
- ABC1s (29% vs. C2DE, 18%)

### 2.14.2 Interest in decarbonisation and energy transition

Figure 32 shows that most (63%) consumers say they are interested in decarbonisation and energy transition (very interested, 18%; interested, 45%), with 37% not interested (not very interested, 28%; not at all interested, 9%).



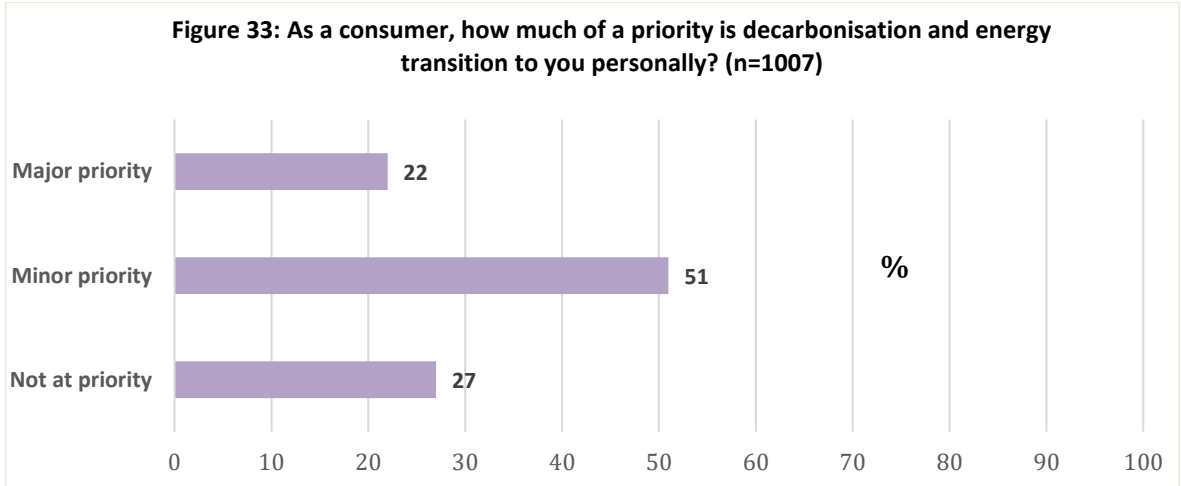
#### Statistically significant differences between consumer groups:

Those more likely to be interested in decarbonisation and energy transition included:

- Those with a disability (69% vs. 61%)
- Derry and Strabane residents (81%) compared with an average of 63% for all areas

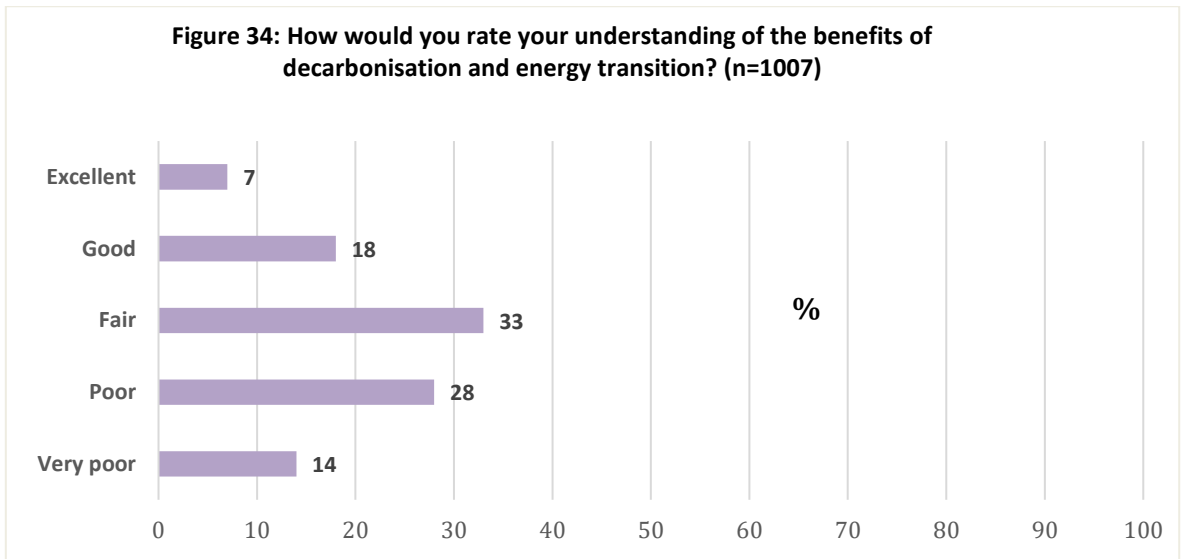
**2.14.3 Decarbonisation and energy transition as a priority for consumers**

More than seven out of ten (73%) consumers said that decarbonisation and energy transition is a priority for them personally, with 22% saying it a major priority and 51% a minor priority.



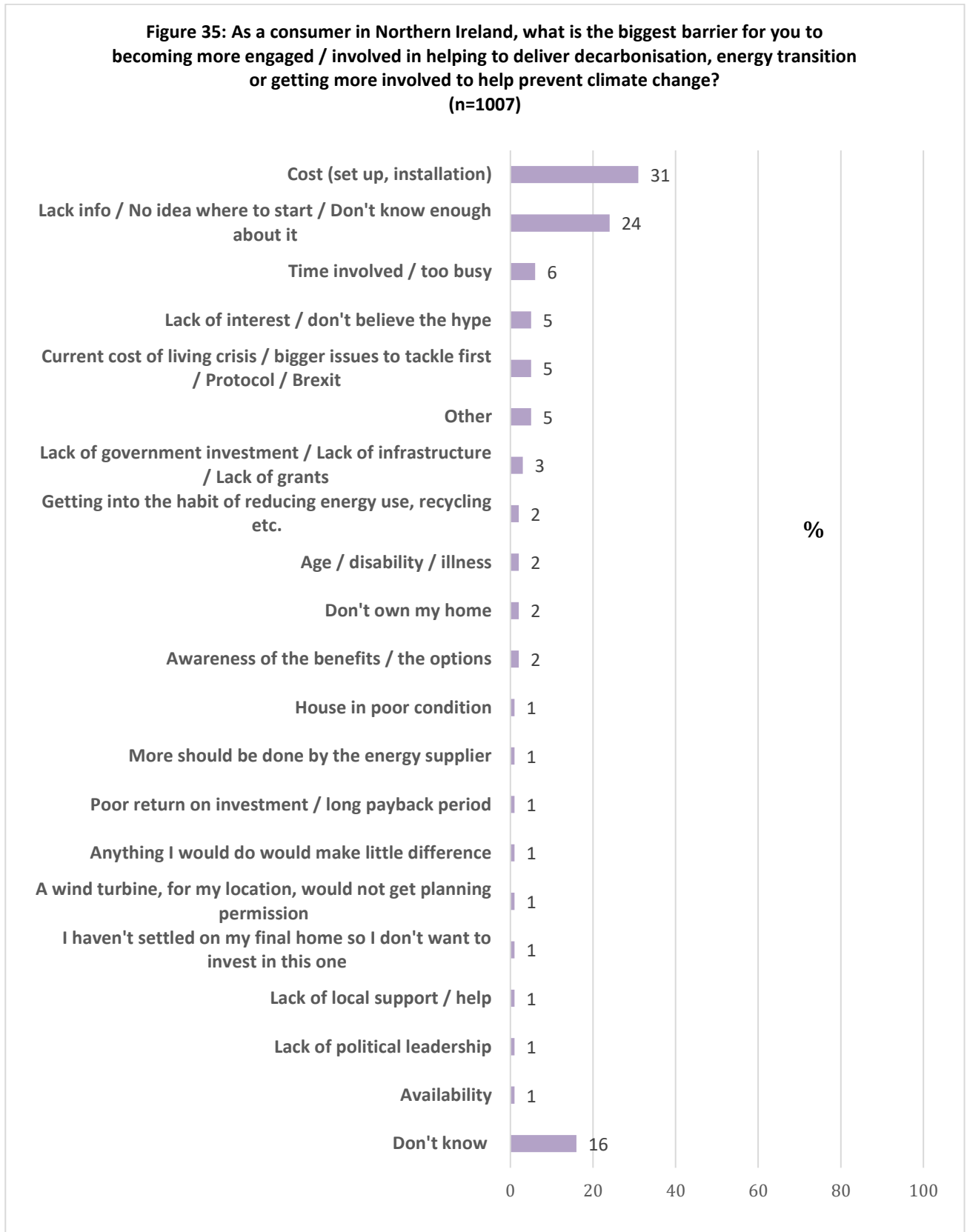
**2.14.4 Understanding of the benefits of decarbonisation and energy transition**

One in four consumers (25%) rated their understanding of the benefits of decarbonisation and energy transition as either excellent (7%) or good (18%), with 33% self-rating as fair and 42% as either poor (28%) or very poor (14%).



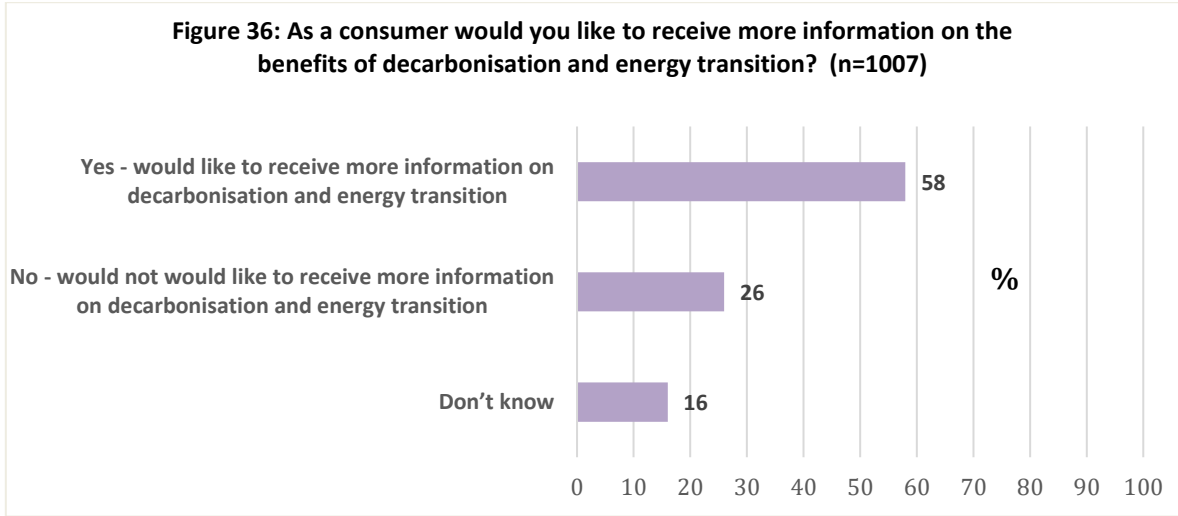
2.14.5 Biggest barrier to becoming more engaged / involved in decarbonisation and energy transition

Cost (31%), lack of information and knowledge (24%), and the time required (6%), were the most common barriers for consumers to be more engaged / involved in helping to deliver decarbonisation, energy transition or getting more involved to help prevent climate change.



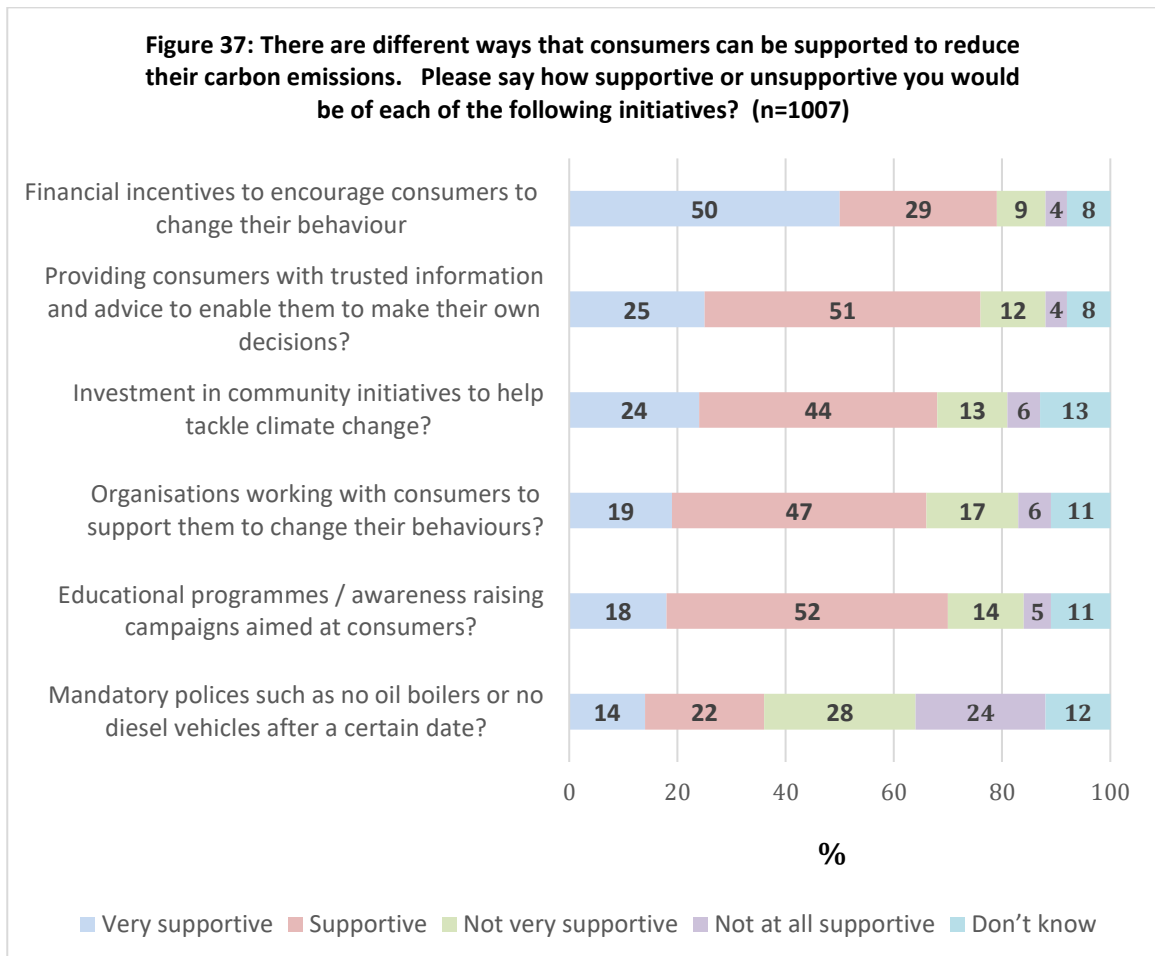
2.14.6 More information on decarbonisation and energy transition

Almost six out of ten (58%) consumers said they would like to receive more information on the benefits of decarbonisation and energy transition.



2.14.7 Consumer support for different options to reduce their carbon emissions

Consumers were presented with a number of different ways that they can be supported to reduce their carbon emissions, with the highest level of support for financial incentives to encourage behaviour change (79%). Relative to other forms of support, mandatory policies such as no oil boilers or no diesel vehicles after a certain date recorded the lowest level of support (36%).



## Appendices

## Appendix 1 (Questionnaire)





## QUESTIONNAIRE v2

# Quantitative Research on the Impact of the Energy Crisis on Affordability and the Impact of Energy Transition on Consumers

30 January 2023



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**SECTION A: Home Energy Bills**

A1. How concerned are you about current energy prices? **(Single code)**

Very concerned	1
Concerned	2
Not very concerned	3
Not at all concerned	4
Don't know	5

A2. How is your household coping with energy bills at the moment? **(Single Code)**

Very well	1
Well	2
Not very well	3
Not at all well	4
Don't know	5

A3. We would like to understand a little more about how your household's financial situation is affected by your energy bills. Which of the following statements best describes your situation? **(Select one only)**

We never struggle to pay our energy bills	1
We sometimes struggle to pay our energy bills but usually manage to keep on top of it	2
We struggle to pay our energy bills and are often behind in payments, have to use a credit card or borrow money	3
We always struggle to pay our energy bills and are nearly always behind in my payments, have to use a credit card or borrow money	4
I would rather not say	5

A4. Which of the following statements best describes your situation in relation to heating your home? **(Single Code)**

I want to keep my home warm and can afford to	1
I want to keep my home warm but can't afford to	2
I want to keep my home warm but choose not to for other reasons (please specify)	3
Don't know	4

A5. Are you actively or purposely using less energy now that you did this time last year because of the current cost of energy? **(Single Code)**

Yes	1
No	2
Don't know	3

A6. Thinking of this winter (December - February), have you had to change the way you heat your home in any of these ways in order to try and afford your energy bills? **(Select all that apply)**

Heat for fewer hours than you would like to	1
Heat to a lower temperature than you would like to	2
Heat less of your home than you would like to	3
None of the above	4

A7. Thinking about this winter (December to February) have you, or has anyone else in your household, done any of the following? **(Select all that apply)**

Wore extra layers of clothing	1
Shut the curtains to help keep the heat in	2
Gone to bed early or stayed in bed late to help stay warm	3
Delayed putting on the heating to help save on cost	4
Used the immersion heater more often	5
Cut down on hot meals to save on energy	6
Turned off the lights / sit in the dark	7
Used less hot water	8
Only use the heating on particular days or particular times	9
Not been able to take a shower / bath because of not having hot water	10
Prioritising eating above heating your home	11
Other (please specify)	12
Don't know	13
Not done any of these things	14

**SECTION B: Energy Use in Your Home**

B1. What is your main source of energy to heat your home? **(Single Code)**

Natural gas (mains gas)	1
Oil	2
Coal	3
Electricity	4
Bottled gas	5
Wood	6
Other (please specify)	7

**ELECTRICITY**

B2. How do you pay your electricity bills? **(Single Code)**

Direct debit	1
Pay by cheque, cash or card on receipt of your bill	2
Prepayment meter	3

B3. Have you cut back on the amount of electricity you are using this winter (December to February) because of the cost? **(Single Code)**

Yes	1
No	2
Don't know	3

**ASK IF B2 EQ 3 OTHERS GO TO B7**

B4a. In the last 12 months have run out of credit on our electricity pre-payment meter because you couldn't afford to top up? **(Single Code)**

Yes	1
No	2
No, but nearly did (I have to keep a close watch on what I'm using to make sure I don't run out of credit)	3
Don't know	4

**ASK IF B4a EQ 1 OTHERS GO TO B6**

B4b. In the last 12 months how often have you run out of credit on your electricity pre-payment meter because you couldn't afford to top up? **(Single Code)**

Weekly	1
Every couple of weeks	2
At least monthly	3
At least every 2-3 months	4
Less often	5

**ASK IF B4a EQ 1**

B5. On the last occasion that you ran out of credit on your electricity pre-payment meter, how long was this for? **(Single Code)**

Less than 12 hours	1
More than 12 hours	2
Don't know / can't remember	3

**ASK IF B2 EQ 3**

B6. Are you worried about not being able to top up your electricity pre-payment meter because of the cost? **(Single Code)**

Yes	1
No	2
Don't know	3

**ASK IF B2 EQ 1 OR 2 OTHERS GO TO B9**

B7. Are you worried about not being able to pay for electricity because of the cost? **(Single Code)**

Yes	1
No	2
Don't know	3

**ASK IF B2 EQ 1**

B8. Is the direct debit amount you are currently paying your electricity supplier affordable? **(Single Code)**

Yes	1
No	2
Don't know	3

**GAS**

**ASK IF B1 EQ 1**

B9. How do you pay your gas bills? **(Single Code)**

Direct debit	1
Pay by cheque, cash or card on receipt of your bill	2
Prepayment meter	3

**ASK IF B1 EQ 1**

B10. Have you cut back on the amount of gas you are using this winter (December to February) because of the cost? **(Single Code)**

Yes	1
No	2
Don't know	3

**ASK IF B9 EQ 3**

B11a. In the last 12 months have you run out of credit on your gas pre-payment meter because you couldn't afford to top up? **(Single Code)**

Yes	1
No	2
No, but nearly did (I have to keep a close watch on what I'm using to make sure I don't run out of credit)	3
Don't know	4

**ASK IF B11a eq 1**

B11b. In the last 12 months how often have you run out of credit on your gas pre-payment meter because you couldn't afford to top up? (Single Code)

Weekly	1
Every couple of weeks	2
At least monthly	3
At least every 2-3 months	4
Less often	5

**ASK IF B11a EQ 1**

B12. On the last occasion that you ran out of credit on your gas pre-payment meter, how long was this for? **(Single Code)**

Less than 12 hours	1
More than 12 hours	2
Don't know / can't remember	3

**ASK IF B9 EQ 3**

B13. Are you worried about not being able to top up your gas pre-payment meter because of the cost? **(Single Code)**

Yes	1
No	2
Don't know	3

**ASK IF B9 EQ 1 OR 2**

B14. Are you worried about not being able pay for your gas because of the cost? **(Single Code)**

Yes	1
No	2
Don't know	3

**ASK IF B9 EQ 1**

B15. Is the direct debit amount you are currently paying your gas supplier affordable? **(Single Code)**

Yes	1
No	2
Don't know	3

**OIL****ASK IF B1 EQ 2 OTHERS GO TO B23**B16. How do you normally pay for your oil? **(Single Code)**

Cash / cheque / debit card	1
Direct debit	2
Credit card	3
Other (please specify) [POP UP]	4

**ASK IF B1 EQ 2**B17. Have you cut back on the amount of home heating oil you are using this winter (December to February) because of the cost? **(Single Code)**

Yes	1
No	2
Don't know	3

**ASK IF B1 EQ 2**B18. In the last 12 months have run out of home heating oil because you couldn't afford to top up? **(Single Code)**

Yes	1
No	2
Don't know	3

**ASK IF B18 EQ 1**B19. On the last occasion that you ran out of oil, how long was this for? **(Single Code)**

A day	1
2-3 days	2
4-5 days	3
6-7 days	4
More than a week	5
More than a couple of weeks	6
Longer than a couple of weeks	7
Other reason (please specify)	8

**ASK IF B1 EQ 2**B20. Are you worried about not being able to refill you oil tank because of the cost? **(Single Code)**

Yes	1
No	2
Don't know	3

**ASK IF B1 EQ 2**B21. Do you shop around when buying oil? **(Single Code)**

Yes, I shop around	1
I am in an oil buying club	2
No, I don't shop around / use the same supplier	3
Other (please specify) [POP UP]	4

**ASK IF B1 EQ 2**B22. Do you use emergency / 20 litre drums of oil? (Single Code) **(Single Code)**

Yes	1
No	2

**ASK ALL**

- B23. Because of the cost of heating your home this winter (December to February) have you done any of the following? **(Select all that apply)**

Used an open fire rather than using oil or gas to heat your home	1
Used an electric radiator rather than using oil or gas to heat your home	2
Turned off radiators in some rooms to help reduce cost	3
Used a wood burning stove rather than using oil or gas to heat your home	4
Not done any of the above	5

**Section C: Awareness of Help and Support**

- C1. Have you seen or heard any information or publicity on help and support available to energy consumers who may be struggling with their energy bills? **(Single Code)**

Yes	1
No	2
Don't know	3

- C2. If you were struggling with you energy bills who would you turn to for advice and support?

- C3. Were you aware that if you are worried about paying your energy bills? **(Code all that apply)**

You can contact your energy supplier to get help and support?	1
Suppliers may reassess debt repayments for customers in financial distress?	2
Suppliers can refer customers struggling to pay their bills to organisations offering free independent advice ?	3
Not aware of any of these	4

- C4. Have you every contacted your electricity or gas supplier because you needed advice, information or support in relation to your energy bills? **(Single Code)**

Yes, contacted my electricity supplier	1
Yes, contacted my gas supplier	2
Yes, contacted both my electricity and gas supplier	3
No	4

**ASK IF C4 LE 3**

- C5. How satisfied or dissatisfied were you with the help and support you got from your energy supplier? **(Single Code)**

Very satisfied	1
Satisfied	2
Neither satisfied nor dissatisfied	3
Dissatisfied	4
Very dissatisfied	5
Don't know	6

**ASK IF C5 EQ 4 OR 5**

- C6. Please say why you were dissatisfied?

C7. Have you ever switched energy supplier? **(Single Code)**

Yes, within the last year	1
Yes, but more than a year ago	2
No	3

**ASK IF C7 EQ 3**

C8. What is the **main reason** why you have never switched energy provider? **(Single Code)**

Never thought about it	1
Too much trouble / too difficult	2
Don't know how to go about it	3
Don't know the benefits of switching	5
Energy suppliers are all the same	6
Other (please specify) POP UP	7

C9. There are a number of different schemes in Northern Ireland designed to help and support consumers who may be struggling with their energy bills. Please say which of the following schemes you are aware of? **(Select all that apply)**

Aware and received payment	1
Aware and eligible but not received payment yet	2
Aware but not eligible	3
Never heard of this scheme	4

A	Low Income Cost of Living Payment [£650 Paid in two instalments £326 and £324]
B	Disability Cost of Living Payment [£150]
C	Pensioner Cost of Living Payment [£300]
D	Energy Price Guarantee [Reduces unit price of <b>electricity</b> by set amount]
E	Energy Price Guarantee [Reduces unit price of <b>gas</b> by set amount]
F	Energy Bill Support Scheme [£600]

**ASK IF C9A TO C9F EQ 1**

C10. Did these schemes make a difference to your household?

Yes, a big help	1
Yes, helped a little bit	2
No	3

C11. What is the **single most important thing** that would help consumers to cope better with energy bills at the moment?

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**Section D: Measuring Fuel Poverty**

A key part of this research is to measure the level of fuel poverty in Northern Ireland. Fuel poverty is defined as a household spending 10% or more of its income (take home wages, benefits, pension etc.) on energy bills. The following questions will help provide a measure of how many households are living in fuel poverty in N Ireland.

- D1. I would now like to know how much you spend on electricity. Do you buy electricity on a weekly, monthly, quarterly or yearly basis? (Single Code)

Weekly	1
Monthly	2
Quarterly	3
Yearly	4

- D2. How much do you spend on **ELECTRICITY** on a [SUBSTITUTE FROM D1] basis? If you are struggling to remember, please put in an approximate amount.

£

**ASK IF B1 EQ 1 OTHER GO TO D5**

- D3. I would now like to know how much you spend on gas. Do you buy gas on a weekly, monthly, quarterly or yearly basis? (Single Code)

Weekly	1
Monthly	2
Quarterly	3
Yearly	4

**ASK IF B1 EQ 1**

- D4. How much do you spend on **GAS** [SUBSTITUTE FROM D4]? (£)

£

**ASK IF B1 EQ 2 OTHERS GO TO D9**

- D5. Approximately how much oil did you order in the last year? [Record response to the nearest 100 litres]

Litres

**ASK IF B1 EQ 2**

- D6. Approximately how much did you spend on home heating oil in the last year? [Record response to the nearest £100] [If you are struggling to remember, please put in an approximate amount].

£

**ASK IF B1 EQ 2**

- D7. How much do you normally spend each time you order oil (if respondent is struggling to remember please probe for an approximate amount spent (£))?

£

**ASK IF B1 EQ 2**

- D8. How often do you order oil in a year?

Number of times

D9. In the last year did you buy any other types of fuel to heat your home (e.g. coal, turf, wood, gas cannister etc.)? **(Single Code)**

Yes	1
No	2

**ASK IF D9 EQ 1**

D10. Approximately how much did your household spend on these other fuels to heat your home?

£

D11. To allow us to calculate the amount of fuel poverty in Northern Ireland we need to know your **total household income** per month (i.e. wages after tax but include pensions, benefits etc.). What is your total household income per month after tax? [please note that if you are struggling with the exact amount please provide an approximate amount].

£

D12. Do you have any damp or mould anywhere in your home? **(Single Code)**

Yes	1
No	2
Don't know	3

D13. In winter would you say your home is normally warm or cold? **(Single Code)**

Very warm	1
Warm	2
Cold	3
Uncomfortably cold	4
Don't know	5

**ASK IF D13 EQ 3 OR 4**

D14. Why is your home normally cold in winter? **(Select all that apply)**

Hard to heat	1
Poor insulation	2
Can't afford to heat it	3
Only turn the heating on at certain times	4
Tend to use only 1 or 2 rooms	5
Other reason (please specify)	6
Don't know	7

**Section E: Low Carbon Technologies**

Decarbonisation and energy transition is the process of replacing fossil fuels (e.g. oil and coal) with low carbon energy sources (e.g. solar, wind, renewable energy etc.). Northern Ireland is committed to having net zero carbon emissions by 2050. We will reach net zero when the amount of greenhouse gas we add to the atmosphere is no more than the amount we take away.

E1. Before taking part in this survey today, how would you rate your awareness and understanding of decarbonisation and energy transition? **(Single Code)**

Excellent	1
Good	2
Fair	3
Poor	4
Very poor	5

E2. As a consumer, how interested are you in decarbonisation and energy transition? **(Single Code)**

Very interested	1
Interested	2
Not very interested	3
Not at all interested	4

E3. As a consumer, how much of a priority is decarbonisation and energy transition to you personally? **(Single Code)**

Major priority	1
Minor priority	2
Not at priority	3

E4. How would you rate your understanding of the benefits of decarbonisation and energy transition? **(Single Code)**

Excellent	1
Good	2
Fair	3
Poor	4
Very poor	5

E5. As a consumer in Northern Ireland, what **is the biggest barrier for you to** becoming more engaged / involved in helping to deliver decarbonisation, energy transition or getting more involved to help prevent climate change?

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E6. As a consumer would you like to receive more information on the benefits of decarbonisation and energy transition? **(Single Code)**

Yes	1
No	2
Don't know	3

E7. There are different ways that consumers can be supported to reduce their carbon emissions. Please say how supportive or unsupportive you would be of each of the following initiatives? **(Answer for each)**

Very supportive	1
Supportive	2
Not very supportive	3
Not at all supportive	4
Don't know	5

1	Educational programmes / awareness raising campaigns aimed at consumers?
2	Providing consumers with trusted information and advice to enable them to make their own decisions?
3	Organisations working with consumers to support them to change their behaviours?
4	Financial incentives to encourage consumers to change their behaviour
5	Mandatory polices such as no oil boilers or no diesel vehicles after a certain date?
6	Investment in community initiatives to help tackle climate change?

**Section F: About You**

F1. Are you...? **(Single Code)**

Male	Female
1	2

F2. What age are you?

F3. How many dependent children live in your household...?

Aged under 5	
Aged between 6-11	
12-18	

F4. Including you how many adults live in your household?

F5. What is your occupation of the highest income earner in your household?

F6. INTERVIEWER RECORD SEG OF RESPONDENT: **(Single Code)**

ABC1	1
C2DE	2

F7. What is your current employment status? **(Single Code)**

Self-employed	1
Working full-time	2
Working part-time	4
Seeking work for the first time	5
Unemployed, i.e. not working but actively seeking work	6
Not actively seeking work but would like to work	7
Not working and not seeking work	8
Looking after home and family	9
Unable to work due to permanent illness or disability	10
Student (full time)	11
Student (part time)	12
On a government or other training scheme / apprenticeship	13
Retired	14
Other (please specify)	15

F8. What is your highest educational qualification? **(Single Code)**

Degree Level or higher	1
BTEC (Higher), BEC (Higher), TEC (Higher), HNC, HND	2
GCE A 'Level (including NVQ Level 3)	3
BTEC (National), BEC (National), TEC (National), ONC, OND	4
GCSE (including NVQ Level 2), GCE O' Level (including CSE Grade 1), Senior Certificate, BTEC (General), BEC (General)	5
CSE (Other than Grade 1)	6
Other (Please specify)	7
No formal qualification	8
Prefer not to say	9

F9. Are your day to day activities limited because of a health problem or disability which has lasted or is expected to last, at least 12 months? Include problems which are due to ageing. **(Single Code)**

Yes, limited a lot	1
Yes, limited a little	2
No	3
Prefer not to say	9

F10. How would you describe your physical and mental health? **(Code for each)**

	Physical health	Mental health
Excellent	1	1
Good	2	2
Fair	3	3
Poor	4	4
Very Poor	5	5
Prefer not to say	6	6

F11. Which area do you live in? **(Single Code)**

Antrim and Newtownabbey Borough Council	1
Ards and North Down	2
Armagh City, Banbridge and Craigavon	3
Belfast	4
Causeway Coast and Glens	5
Derry and Strabane	6
Fermanagh and Omagh	7
Lisburn and Castlereagh	8
Mid and East Antrim	9
Mid Ulster	10
Newry, Mourne and Down	11

F12. Is your home...? **(Single Code)**

Owned outright or owned with a mortgage	1
Northern Ireland Housing Executive	2
Housing Association	3
Private rented	4
Other (please specify)	5

F13. Is your home..? **(Single Code)**

Detached	1
Semi-detached	2
Terraced	3
Apartment / flat	4
Other (please specify)	5
Don't know	6

F14. What type of area do you live in? **(Single Code)**

City	1
A town	2
A village	3
Rural or countryside	4

F15. Could you please indicate the number that best describes **your total household income** per year (whether from employment, pensions, state benefits, investments, or any other sources) before the deduction of tax. **(Single code)**

Less than £10,000	1
£10,001 – £20,000	2
£20,001 – £30,000	3
£30,001 – £40,000	4
£40,001 – £50,000	5
£50,001 - £60,000	6
£60,001 - £70,000	7
£70,001 - £80,000	8
£80,001- £90,000	9
£90,001 - £99,999	10
£100,000+	11
Prefer not to answer/ Don't know	12

F16. Is your household in receipt of universal credit? **(Single Code)**

Yes	1
No	2
Don't know	3
Prefer not to say	9

D17. Finally, in the last 12 months have you..? (Code all that apply)

Sought advice for debt or financial problems	1
Used a food bank	2
No	3
Prefer not to say	4

**THANK AND CLOSE**