



# Domestic Consumer Insight Tracker Survey

Report prepared for the Utility Regulator

28<sup>th</sup> January 2022



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# 1. Key insights: an executive summary

The following paragraphs summarise the background and approach taken to the Utility Regulator's Domestic Insight Tracker 2021. This is followed by a brief outline of the key findings structured to reflect the main themes of the survey.

## 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 in line with best practice.

This is a follow-up survey to the Domestic Tracker conducted in 2019, and comparisons with that study have been made throughout this report, where appropriate.

## Methodology

A telephone methodology was used to conduct the surveys. In total, 1514 interviews were completed, which were representative of the household population in Northern Ireland. Interviewing took place during October 2021 and November 2021 with each interview taking, on average, 10 to 15 minutes to complete. Interviewing was carried out in compliance with the GDPR 2018 and the Market Research Society Code of Conduct.

It should be noted that the COP26 summit in Glasgow took place during the interviewing period, meaning there will have been increased media coverage of the topics covered in this survey.

## Key findings and recommendations

### Heating types and current energy supplier

- Almost two thirds (64%) use oil to heat their homes, followed by one third (33%) who have mains gas installed.
- 5% of domestic consumers have intentions to switch their home heating method in the next three years, with mains gas (43%) being the most likely energy source these respondents would switch to.
- 6% of electricity and 3% of gas customers stated that they were likely to switch from their current heating source within the next three years, with mains gas (43%) and renewables (27%) the more preferred heating sources to switch to.
- Almost all (95%) of domestic consumers are aware of who their electricity supplier is, with Power NI (48%) and SSE (25%) being the more common suppliers. 89% of those with mains gas were able to recall who their gas supplier is, with half (51%) using SSE and 42% using Firmus.

## Payment

- Less than half (47%) spend £60 or more on their electricity per month; an increase from 39% in 2019. In terms of heating, 43% of gas consumers have a monthly spend of £30 to £59, although 33% of gas consumers say they spend more than this
- A prepayment meter was the most common method of paying for both electricity (39%) and gas (57%). Convenience was the most often cited reason for having one (73% of those with an electricity prepayment meter and 68% of those with a gas prepayment meter). The majority of electricity (96%) and gas (94%) 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.
- Half of electricity (50%) and gas (51%) customers reported that they do not know how the price of electricity or gas compares to other regions.
- 54% of respondents stated that they would be unwilling to pay anything extra on their bill for future investment. However, support for paying more has increased since the 2019 survey. While one third (32%, 19% in 2019) would be willing to pay extra for investment in projects to protect the environment, 27% (19% in 2019) would do so to support vulnerable customers and 18% (8% in 2019) to improve reliability of the network.

## Interactions with energy suppliers

- Post was the most common method of receiving correspondence from both electricity (51%) and gas (47%) suppliers. 71% of electricity customers reported at least looking at the correspondence (either glancing at it or reading it in full), with 77% of those respondents saying they understood the information. Gas consumers were less likely to read or glance at the correspondence (63%), although 74% of those that did agree that the information was clear and understandable.
- Around two thirds said they trust their electricity supplier to treat them fairly (69%) and to give them a fair price (64%), with 10% and 13% respectively reporting that they distrust their electricity supplier in these regards. Less than two thirds (65%) of gas consumers said they trust their supplier to treat them fairly in any dealings and 12% stated that they distrust them, while 60% said they trust and 16% distrust them to offer a fair price.
- The majority (87%) of domestic consumers report satisfaction with their electricity supplier with 3% expressing dissatisfaction. 83% were satisfied with their gas supplier and 4% were dissatisfied.
- 9% contacted their electricity supplier in the last year, with switching energy contract (34%), querying a bill (19%) and payment issues (15%) the most common reasons for this. Of those that made contact, 79% found it easy to get in touch, 79% thought they were listened to, 78% felt they were treated fairly, and 75% said that their electricity supplier was supportive.



## Complaint handling

- 2% of both electricity and gas consumers 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 or gas supplier in the past but left it unreported.

## Switching

- There was a high level of awareness (94%) of being able to choose between different electricity suppliers amongst domestic consumers, with 71% of those consumers agreeing that having this choice gives access to better deals. Two fifths (40%) had compared electricity deals to see if they could switch supplier or tariff, while one third (33%) of those who have the option to switch between gas suppliers said that they had compared gas deals.
- 44% of electricity consumers and 35% of gas customers were confident that they are on the best energy deal for them.
- 46% of domestic consumers have switched their electricity supplier at least once, a decrease of 13 percentage points from 59% in the 2019 Tracker; of these, two thirds (67%) have done so within the last three years. In contrast, only 10% of those who have the option had switched gas suppliers.
- Reacting to a promotional offer from another supplier (33%) and feeling they were overpaying on their current deal (32%) were the main drivers for switching electricity supplier. While these drivers are also evident in the 2019 Tracker, the incidence of reacting to an offer from a doorstep seller has increased from 4% in 2019 to 31% in 2021.
- Almost half (49%) of electricity consumers who had switched did so through a doorstep seller.
- 82% of respondents agreed that they received the deal they were expecting when they switched electricity supplier, although 12% disagreed. 79% reported a positive and 2% a negative experience when they switched.
- Two thirds (66%) said that they had never switched electricity supplier because they were happy with their current service. Satisfaction with the current service (58%) was also the main reason cited for not switching gas supplier. This is consistent with the 2019 Tracker, in which 57% and 45% stated they were happy to remain with their current electricity and gas supplier respectively.
- 23% and 19% respectively said they were likely to switch their electricity and gas 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 (96%) of those with internet access were aware they could compare electricity deals, while 48% of those who are confident internet users said they had compared electricity deals compared to 23% who are not confident. Half (49%) of those who have internet access had switched electricity supplier at least once in contrast to 22% of those without internet access.

## Payment difficulties

- 98% of domestic consumers and 99% of gas customers report that they are always or usually able to keep up with their electricity and gas bills.
- 19% of respondents with a prepayment meter reported that they had run out of money on their meter and gone without electricity over the past year, compared to 1% of those with a credit meter (ie those who pay by direct debit or on receipt of bill) who were unable to afford electricity.
- 4% and 3% report that they have had to delay or go without other essentials so that they could pay for electricity and gas respectively.
- One third of domestic consumers stated that, over the last year, they have reduced the amount of electricity they use, while 28% of gas customers have reduced the amount of gas they use. This suggests that, rather than opting to not pay electricity and gas bills, consumers may be choosing to reduce their usage instead to ensure bills are affordable.

## Consumer protections

- Half (49%) of domestic consumers are aware that energy suppliers have obligations to protect them.
- Two thirds (66%) of 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.

## Support services

- Just under two thirds (63%) of domestic consumers were not aware of the special services offered by energy companies to consumers who are vulnerable or who require extra support.
- 4% were signed up to or had utilised some of the support service offered by energy companies.
- The majority (95%) of those in the high or medium vulnerability group had not signed up to utilise any of the support services offered by energy companies.

# Conclusions and recommendations

## Impact of rising energy costs

At the time of this survey price increases were announced by most energy suppliers in Northern Ireland<sup>1</sup> and comparisons with the previous tracker in 2019 reveal that domestic consumers are now spending more on their energy.

These price increases may have had an impact on consumer behaviour. Although only a small percentage of domestic consumers reported having difficulties paying their energy bills and maintaining their supply, one third (34%) stated that they have reduced their electricity use in the past year and 28% of gas customers have also done so. The findings suggest that consumers may be reducing their energy usage to offset potential rising energy prices and to ensure their bills remain affordable. It is therefore important that any future policy decisions

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<sup>1</sup> <https://www.bbc.co.uk/news/uk-northern-ireland-58558645>

are set within this context and the likely impact on consumers is evaluated. The rising prices of energy may also have a 'knock on' effect on the appetite of consumers for future investment. Over half of respondents did not wish to incur any further expenditure on their electricity and gas bills to support investment in protecting the environment, supporting vulnerable consumers, or in improving the reliability of the network to ensure a secure supply of energy.

## The convenience of inertia over cost savings when choosing energy supplier

It is interesting that although around one third of consumers have taken action to reduce their energy usage, the incidence of switching both electricity and gas supplier has fallen since the 2019 tracker. Over half (52%) of respondents reported having never switched their electricity supplier, compared to two in five (40%) in 2019. There was a more dramatic difference in the incidence of gas switching, with nine in ten (86%) of those who have the option to saying they had never switched compared to under two thirds (63%) in 2019.

Across both electricity and gas customers, satisfaction with their current service, and being worried about how much hassle switching would be, were the most common reasons given for not switching. This is despite switchers reporting a largely positive experience of the switching process. Both electricity and gas switchers were more likely than non-switchers to be confident that they were on the best deal available to them and that they received the deal they were expecting, while only a small percentage of non-switchers felt that they were already on the cheapest deal available. Switchers were also more likely to have intentions to switch again in the next 12 months.

The Utility Regulator may therefore wish to engage further with domestic consumers to ensure that they are aware of the best deal that is available to them, with older consumers and those who have no access to or confidence in using the internet requiring particular attention.

## Prevalence of doorstep sellers

The frequency of using doorstep sellers to access and switch energy deals has further increased since 2019. Half of those who switched electricity supplier did so through a doorstep seller, with almost one third saying that the main reason they switched was because they were sold to by a doorstep seller. Use of a doorstep seller to switch was particularly evident amongst domestic consumers who were not confident with using the internet.

The Utility Regulator may therefore wish to consider whether or not additional steps are needed to increase the awareness of potential issues of switching using doorstep sellers and the rights of the consumer in these circumstances. While signposting to relevant websites may be effective for those who have the confidence to search for this information, alternative methods would need to be considered for those who lack the confidence to use the internet, or who do not have access to the internet at all.

## Awareness of supplier obligations

Less than half of the respondents were aware of their supplier's obligations to them, with two thirds of those who are aware knowing how to go about making a complaint when these obligations have not been met. The Utility Regulator may therefore wish to consider how to ensure domestic consumers are aware of what the obligations are, and that they know the best procedure for making a complaint when these expectations have not been met.

## Engagement with younger consumers

There were several findings to suggest that younger consumers are less engaged with their energy suppliers. While there was a similar rate of not reading or only glancing at correspondence from suppliers across all age groups, those in the younger age group were more likely to say they either did not receive any correspondence or did not remember in what form they received it. Those in the youngest age group were also only behind the 65 plus age group in terms of the incidence of comparing electricity deals, switching electricity supplier and saying they were likely to switch; with those who had not switched being more likely to say they did not know that it was an option. Furthermore, younger respondents were the most likely age group to use a prepayment meter to pay for their electricity or gas, and so may be missing out on potential direct debit discounts that would be available to them if they used a credit meter.

The Utility Regulator may therefore wish to consider liaising with energy companies to ensure that younger people are aware of the options and opportunities available to them as energy consumers. With almost all (98%) of 18- to 34-year-olds saying they have access to the internet while also being the most likely to be confident internet users (92%), the most efficient method of engagement would appear to be online.

## Engagement with older consumers to overcome inertia

Respondents in the 65 plus age group were both more likely to recall receiving correspondence and reading correspondence from their energy supplier, potentially contributing to the to greater levels of trust in their supplier to treat them fairly and provide a fair price. However, despite this, those aged 65 and over were less likely to know what their monthly expenditure on electricity was. Knowledge of the electricity and gas tariff they were on was also lowest for these respondents.

One particular area where engagement was low was in relation to switching. Older consumers were less likely to have compared electricity deals, while those who were aware that this was possible were less likely to agree that comparing deals gives them access to better prices. Incidences of switching electricity and gas supplier was lowest amongst the 65 and over group. Willingness to switch was also lowest amongst these respondents, with over half reporting being confident that they were on the best deal for them. This more hands-off approach to their energy deals may be limiting the opportunities for older consumers to access the best deal for them, and so the Utility Regulator may wish to review the ways in which energy companies are current engaging with those aged 65 and over.

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

There were several findings throughout the survey which suggest that domestic consumers who are either unable to access the internet or are not confident in using the internet could be excluded from accessing information on their energy. This was particularly evident with regards to comparing energy deals and switching. Those who did not have access to the internet were less likely to have compared their electricity deal, and those people who were not confident internet users were not as likely to find it easy to compare electricity deals. Similarly, switching energy supplier was less likely amongst those with no access to the internet and who are not confident internet users. Respondents who were not confident with using the internet were also more likely to find it difficult to contact their electricity supplier.

The struggles of those without internet access and who do not feel confident using the internet may give explanation to why consumers aged 65 and over demonstrate less engagement with certain areas of their energy deal. One third (32%) of respondents in the 65 plus age group indicated that they had no access to the internet, with two thirds (67%) saying they had access from their own home. Over half (53%) also described themselves as not being confident internet users.

## Passiveness in rural and deprived areas

Domestic consumers living in rural areas appear to be more static in their approach to energy. When compared to those respondents living in urban areas there were fewer incidences of recent switching, with half (50%) of rural consumers saying they switched electricity supplier in the last three years compared to three quarters (74%) of urban consumers. Rural customers were also less likely to have compared their energy deal and demonstrated lower willingness to switch in the future. However, domestic consumers in rural areas appear to be more engaged in energy when it comes to communication with their supplier. Rural consumers (88%) were more likely than urban consumers (82%) to be aware of what form correspondence from their electricity supplier comes in, and with post being the most common form there are opportunities for energy companies to engage with such customers.

Similarly, domestic consumers living in areas that fall under the first quintile of deprivation (most deprived) also demonstrated a passiveness in their approach. Such consumers were less likely to intend to switch their energy source in the next three years and expressed less willingness to pay anything extra on their bill to support investment. Of particular note is the low levels of awareness of the obligations of energy suppliers. With these consumers also less likely to know what form they receive correspondence from their electricity and gas suppliers, potentially due to the prevalence of prepayment meters in these areas, it is important for the Utility Regulator and energy companies to devise more effective ways of engaging with consumers in deprived areas.

## The experience of vulnerable consumers in the energy market

Consumers in the high and medium vulnerability categories tend to take a more proactive approach to their energy deal. They were more likely to have read correspondence they received from their supplier and were more likely to have queried a bill when making contact

with their electricity supplier. Incidences of complaints were also highest amongst those in the high and medium vulnerability group. This more engaged approach may therefore have led to these consumers having greater confidence that they were on the best electricity deal for them, and as such were less likely to have switched supplier. However, one area for concern was the use of doorstep sellers amongst vulnerable consumers who had switched electricity supplier, with over half (55%) reporting using this method the last time they switched.

## Low awareness and usage of support services aimed at vulnerable consumers

There appears to be low awareness of the support available to vulnerable consumers, particularly amongst the target population for such support. Two thirds of those considered to be in the high or medium vulnerability group were not aware of the special services energy companies have in place to support those who are vulnerable. Similarly, almost all those who were of high or medium vulnerability were not signed up to NIE Networks Critical Care Register or their energy supplier's Customer Care Register. It may therefore be necessary to improve signposting and accessibility to these services to allow the target population to benefit from them. Strategies like these will need to take into account that consumers in the high and medium vulnerability groups are both less likely to have internet access (74% reported having access, compared to 97% in the low vulnerability group and 98% who are not vulnerable), and more likely to not be confident internet users (43% stated this, compared to 3% and 9% of low and non-vulnerable consumers respectively).

## Greater engagement leads to more negative perceptions

Engagement when measured by switching behaviour appears to be linked to more negative views of energy suppliers. Domestic consumers who had switched their energy supplier in the last three years were more likely than non-switchers to say they did not trust their supplier to treat them fairly or to provide a fair price, and they were less likely to express satisfaction with the overall service from their supplier. One potential explanation for this is the greater understanding amongst switchers of the energy market and the options available. For example, almost three quarters (73%) of electricity switchers had reported comparing their electricity deal, compared to one quarter (25%) of non-switchers. Further research may therefore be required to explore the specific drivers behind satisfaction and trust.

## Engagement with customers on a prepayment meter

The findings suggest there are mixed levels of engagement amongst domestic consumers who have a prepayment meter for electricity or gas. Respondents with a prepayment meter were less likely to say they have received correspondence from their electricity supplier and were less likely to have read any correspondence they did receive compared to those not on a prepayment meter. This is to be expected since consumers with a prepayment meter are likely only receive an annual statement or notices around tariff increases rather than regular correspondence from their supplier. Gas customers using a prepayment meter were also less likely to have thought the information presented in the correspondence was clear and understandable, and were more likely to not want to switch because they were satisfied with their current service.



On the other hand, comparing electricity deals and switching electricity supplier was more likely amongst those with an electricity prepayment meter. Those on a prepayment meter were also more likely to have intentions to switch again. With prepayment meters now becoming the most common electricity payment method and with continued growth amongst gas households, and the finding that prepayment meter users were more likely to say they struggle to pay their energy bills, it is important for the Utility Regulator and energy companies to understand the behaviours of these consumers.

## Opportunity for awareness-raising around environmental protection and renewables

The COP26 summit in Glasgow took place during the interviewing period, but despite the increased media coverage of the summit and the promotion of the need for action on Climate Change, there was evidence to suggest that use of Low Carbon Technologies (LCTs) among domestic consumers is low. Only 7 of the 1514 respondents surveyed said that they used renewable sources or low carbon technologies to heat their home, while only 2% of all respondents were considering switching to this source. Only a third of respondents were willing to pay anything extra on their electricity (32%) and gas (33%) bills to support investment in projects to protect the environment, although willingness to do this has increased from the 2019 tracker.

The Utility Regulator may therefore wish to explore ways to increase awareness of the opportunities available to domestic consumers to switch to more environmentally friendly energy sources. Further research may also be required to determine domestic consumer's willingness to support investment in projects to protect the environment and any potential barriers for not being willing.

# 2. Introduction

## Background

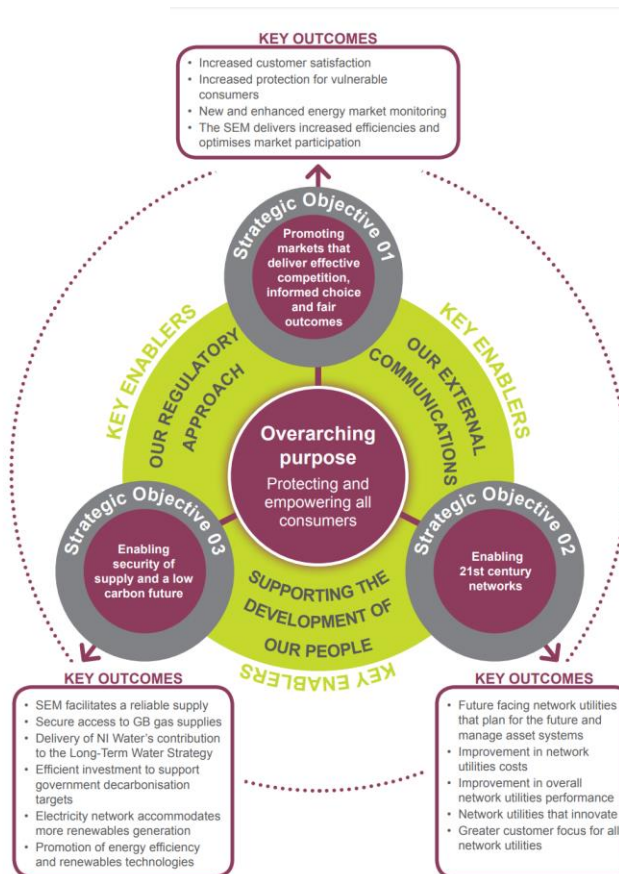
The Utility Regulator is the independent non-ministerial government department responsible for regulating Northern Ireland’s electricity, gas, water and sewerage industries. The Utility Regulator works to deliver a number of key statutory objects including, to protect the short and long-term interests 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 2021, the Utility Regulator commissioned Perceptive Insight, an independent market research company, to conduct the second phase of a tracker survey to measure consumer engagement, experience and attitudes on a number of areas within the domestic energy markets in Northern Ireland.

## Corporate strategy

The survey outcomes will be used to measure progress against key targets in the Utility Regulator’s Corporate Strategy 2019 - 2024 “Protecting Consumers Today and Tomorrow”.

Figure 1: Overview of the Utility Regulator’s Corporate Strategy 2019-2024



Relevant targets include those under 'promoting markets that deliver effective competition, informed choice and fair outcomes', measured in part by:

- % of customers who trust and are satisfied with their energy supplier;
- % of customers who are satisfied with consumer protection arrangements in NI; and
- % of customer who are satisfied with the switching process.

## 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 2019 – 2024.

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 2019 baseline tracker survey.

This is a follow-up survey to the 2019 Domestic Tracker. Comparisons between the results obtained in this survey have been compared with those from 2019 where appropriate. However, due to the Covid-19 pandemic interviewing for the 2021 Domestic Tracker was carried out by telephone, whereas the 2019 Tracker was conducted using a face-to-face methodology. This should be taken into account 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
- Support services

Where relevant statistically significant results exist at the 95% confidence level, these are clearly highlighted. Comparisons are made with the findings of the 2019 Domestic Consumer Insight Tracker where possible. It should be noted that a different methodological approach was taken to the 2019 tracker and included both online and telephone completion of the questionnaire. The 2021 study was conducted entirely by telephone. While the results from the 2019 survey have been included, some differences in the finding may be attributable to the different approaches taken to each study.

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 2021 and November 2021, with each interview taking, on average, 10 to 15 minutes to complete. Interviewing was carried out in compliance with the GDPR 2018 and the Market Research Society Code of Conduct.

It should be noted that the COP26 summit in Glasgow took place during the interviewing period, meaning there will have been increased media coverage of the topics covered in this survey.

## Questionnaire design

The questionnaire was designed in collaboration with the Utility Regulator project team and was initially based on the 2019 tracker questionnaire. On review it was decided to retain some of the tracker questions and add some new questions. 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)<sup>2</sup> we assigned each respondents, 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.

### **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 had not switched suppliers within the last three years and so may require more encouragement to switch in the future<sup>3</sup>. 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 had either never switched or have not switched in the last 3 years. These criteria were also used in the 2019 Domestic Tracker, which allows for comparisons over time.

### **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 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 Domestic Tracker.

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<sup>2</sup> <https://www.nisra.gov.uk/statistics/deprivation/northern-ireland-multiple-deprivation-measure-2017-nimdm2017>

<sup>3</sup> [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](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)

# Respondent demographics

## Age, gender, SEG and location

The table below indicates the final survey responses achieved by age, gender, socioeconomic group and location.

STRATIFICATION VARIABLE		ACHIEVED NO.	ACHIEVED %
Age (HRP)	18 - 34	254	17%
	35 - 44	284	19%
	45 - 64	564	37%
	65 and over	373	25%
	Prefer not to say	39	3%
Gender	Male	748	49%
	Female	765	51%
	Other	1	0%
SEG	ABC1	725	48%
	C2DE	738	49%
	Prefer not to say	51	3%
Urban/Rural	Urban	912	60%
	Rural/Mixed	602	40%
Council	Antrim and Newtownabbey	113	7%
	Ards and North Down	133	9%
	Armagh City, Banbridge and Craigavon	165	11%
	Belfast	270	18%
	Causeway Coast and Glens	119	8%
	Derry City and Strabane	122	8%
	Fermanagh and Omagh	100	7%
	Lisburn and Castlereagh	124	8%
	Mid and East Antrim	109	7%
	Mid Ulster	121	8%
	Newry, Mourne and Down	138	9%
Multiple Deprivation Measure quintile	1 – Most deprived	283	19%
	2	272	18%
	3	321	21%
	4	335	22%
	5 – Least deprived	303	20%
<b>Total</b>		<b>1514</b>	<b>100%</b>



# 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 household;
- Intention to switch heating source; and
- Energy supplier

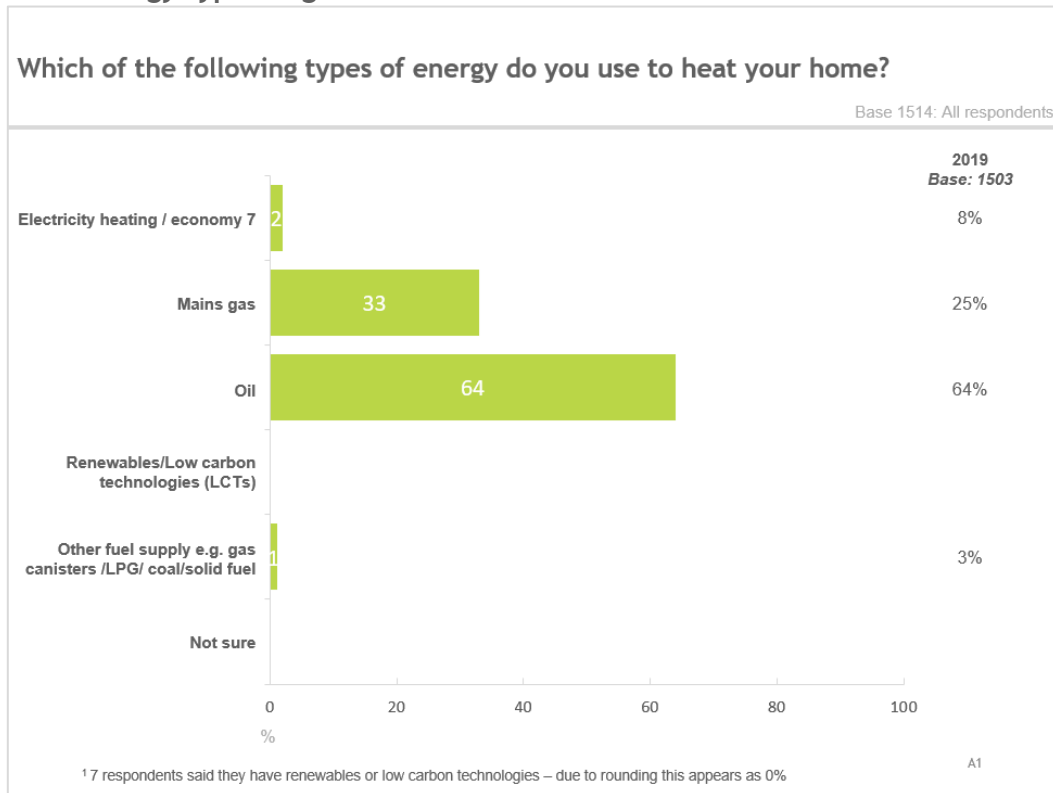
## Key findings

- Almost two thirds (64%) use oil to heat their homes, followed by one third (33%) who have mains gas installed.
- 5% of domestic consumers have intentions to switch their home heating method in the next three years, with mains gas (43%) being the most likely energy source these respondents would switch to.
- 6% of electricity and 3% of gas customers stated that they were likely to switch from their current heating source within the next three years, with mains gas (43%) and renewables (27%) the more preferred heating sources to switch to.
- Almost all (95%) of domestic consumers are aware of who their electricity supplier is, with Power NI (48%) and SSE (25%) being the more common suppliers. 89% of those with mains gas were able to recall who their gas supplier is, with half (51%) using SSE and 42% using Firmus.

## Type of energy used to heat household

The following charts provide a breakdown of respondents by the type of energy used to heat their household. The source of energy most likely to be used was oil with 64% of respondents confirming that they have this in their home. A further third (33%) reported that they had mains gas, an increase from 25% in 2019.

Figure 4.1 Energy type usage



### Mains gas use

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

Figure 4.2 Mains gas usage by gender, age and SEG

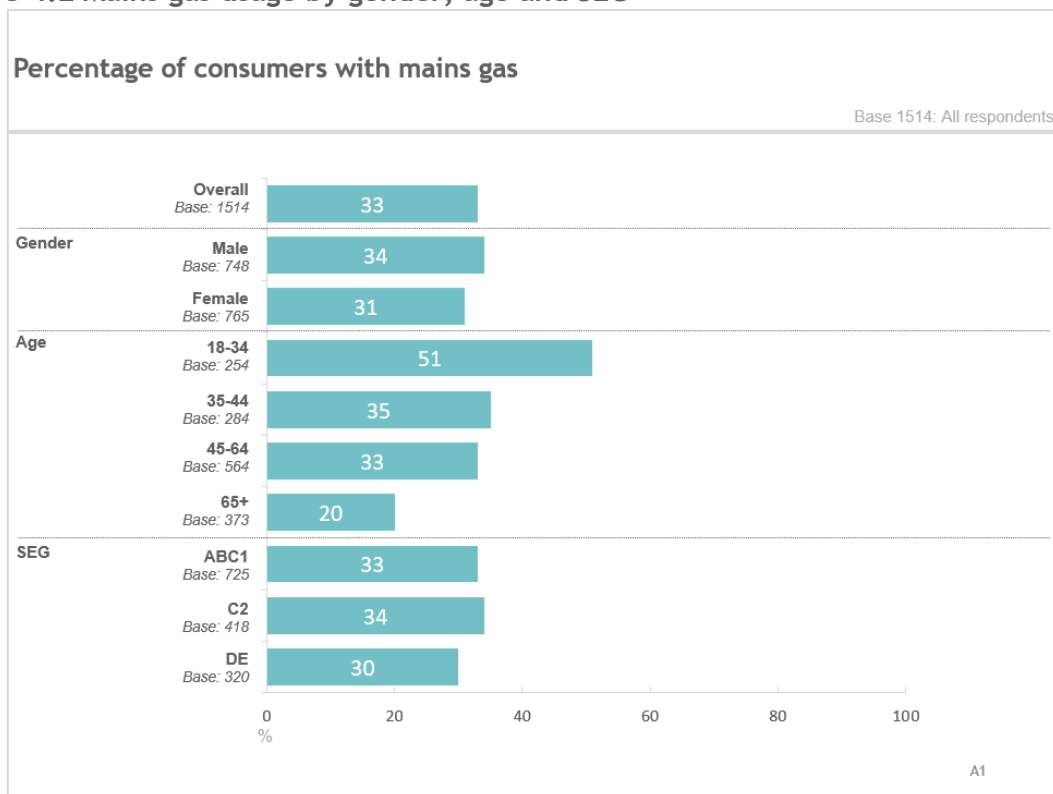
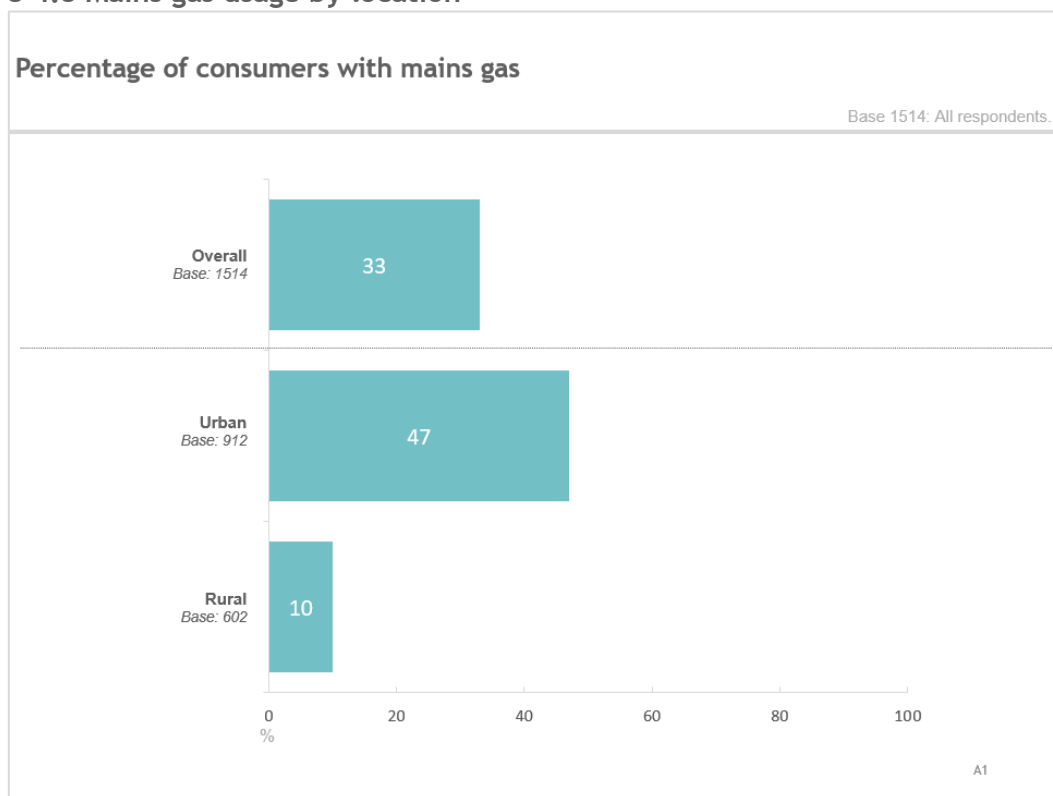


Figure 4.3 Mains gas usage by location



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

- Those aged 65 and over (79%) were more likely to have oil heating than those aged 18 to 34 (46%);
- Respondents who own their home (69%) were more likely to have oil than those in social housing (41%). In contrast, those living in social housing (57%) were more likely to have gas than those who own their home (27%);
- 85% of rural respondents had oil, compared to half (51%) of urban respondents; and
- Consumers in the low vulnerability group (41%) or who were not vulnerable (37%) were more likely to have gas heating than those considered to be of high or medium vulnerability (24%), who were more likely to have oil heating (71%, compared to 55% of low vulnerability and 60% who were not vulnerable).

**Table 4.1 Fuel source by demographics**

		Electricity heating	Mains gas	Oil	Renewables / LCTs	Other	Not sure	Total
Overall	All Base: 1514	2%	33%	64%	0%	1%	0%	100%
Age	Under 35 Base:254	2%	51%	46%	-	2%	-	100%
	35-44 Base:284	0%	35%	62%	1%	1%	-	100%
	45-64 Base:564	1%	33%	65%	-	1%	0%	100%
	65 plus Base: 373	3%	20%	75%	1%	2%	-	100%
	Urban Base: 912	1%	47%	51%	0%	1%	0%	100%
Location	Rural Base: 602	2%	10%	85%	1%	2%	-	100%
	1 - Most deprived Base: 283	2%	46%	52%	-	1%	-	100%
MDM Quintile	2 Base: 272	2%	23%	73%	-	2%	-	100%
	3 Base: 321	1%	23%	74%	0%	2%	-	100%
	4 Base: 335	1%	24%	72%	1%	1%	-	100%
	5 - Least deprived Base: 303	2%	49%	48%	1%	1%	0%	100%
	Owner occupied Base: 1167	1%	27%	69%	1%	2%	0%	100%
Tenure	Private rented Base: 149	3%	44%	53%	-	1%	-	100%
	Social rented Base: 175	2%	57%	41%	-	1%	-	100%
	High/medium vulnerability Base: 597	2%	24%	71%	1%	2%	0%	100%
Vulnerability	Low vulnerability Base: 133	2%	41%	55%	1%	2%	-	100%
	Not vulnerable Base: 784	1%	37%	60%	0%	1%	-	100%

## Intentions to switch energy type

When considering the type of energy used to heat their home, 6% of electricity customer and 3% of gas customers said that they thought they would switch from using their current energy source within the next three years. A further 4% of electricity and 2% of gas consumers expected to switch in over three years-time (see Figure 4.6).

Domestic consumers who were significantly more likely to consider switching energy source included (see Table 4.2):

- 7% of ABC1 respondents, compared to 3% of C2DE respondents; and
- 8% of those in living in the least deprived areas, compared to 2% in the most deprived areas.

Figure 4.4 Likelihood of switching energy source

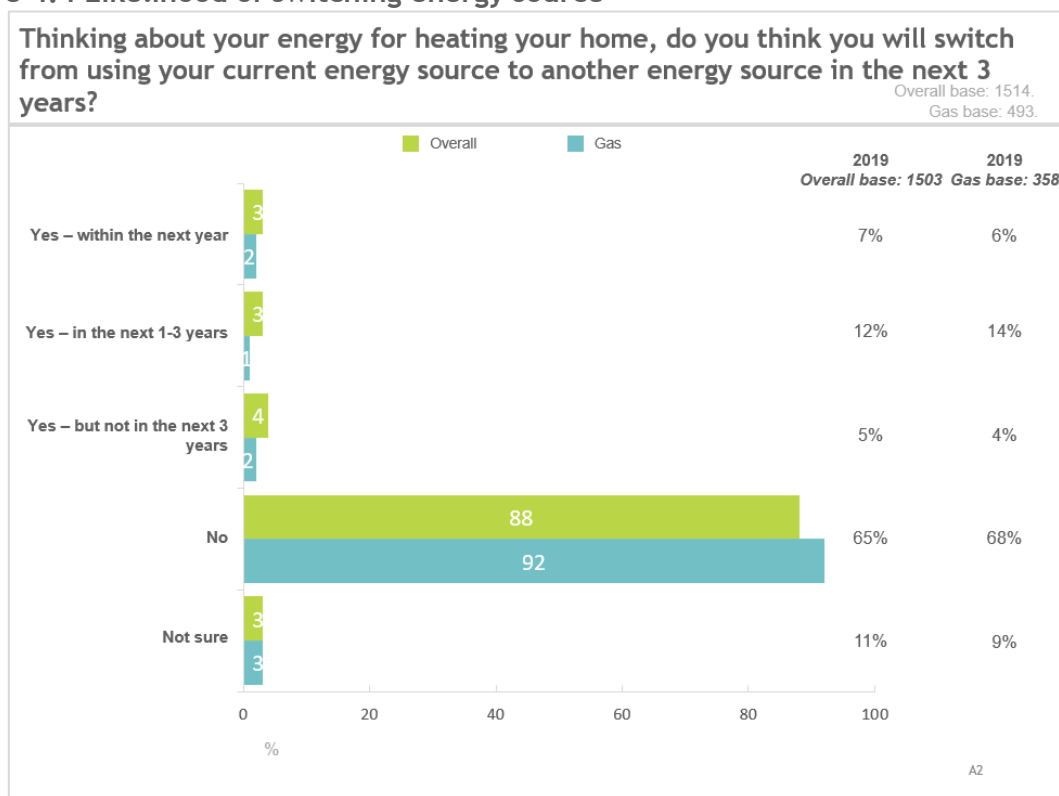


Table 4.2 Likelihood of switching energy source by demographics and deprivation

		Yes	No/not in next 3 years	Not sure	Total
Overall	All Base: 1514	5%	91%	3%	100%
Gas heating	Gas Base: 493	4%	93%	3%	100%
SEG	ABC1 Base: 725	7%	90%	3%	100%
	C2DE Base: 738	3%	93%	4%	100%
MDM Quintile	1 - Most deprived Base: 283	2%	93%	4%	100%
	2 Base: 272	6%	92%	2%	100%
	3 Base: 321	4%	92%	3%	100%
	4 Base: 335	7%	90%	4%	100%
	5 - Least deprived Base: 303	8%	89%	3%	100%

Of those who said they intend to switch their energy source, mains gas (43%) was the most common preference to switch to, followed by renewables or low carbon technologies (27%). 20% of respondents were unsure what energy they intend to switch to.

Younger respondents (aged 18 to 34, 56%) were more likely to want to switch to mains gas than older respondents (aged 65 plus, 19%). 45 to 64 years olds (38%) were the most likely age group to want to switch to a renewable energy or LCTs.

Figure 4.5 Preferred energy source to switch to

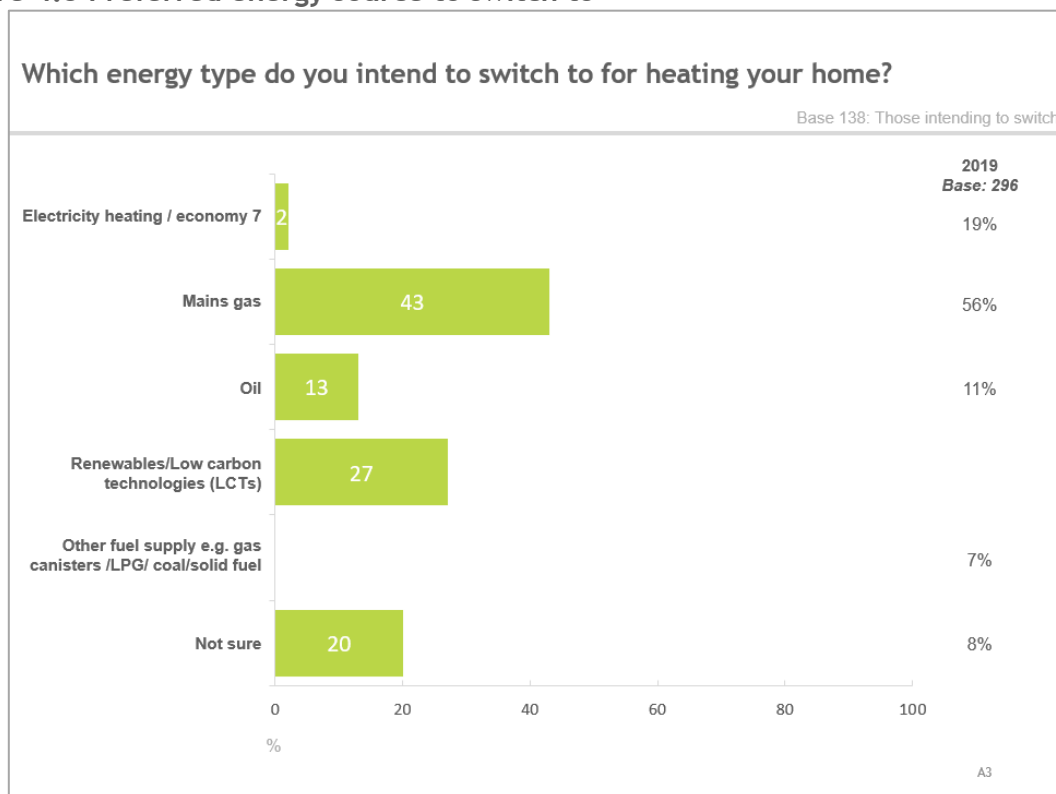


Table 4.3 Preferred energy source to switch to by demographics

		Electricity	Mains gas	Oil	Renewables/ LCTSs	Not sure	Total
Overall	All Base: 138	2%	43%	13%	27%	20%	100%
Age	Under 35 Base: 27	4%	56%	11%	19%	11%	100%
	35-44 Base: 36	-	42%	14%	31%	22%	100%
	45-64 Base: 47	2%	51%	9%	38%	11%	100%
	65 plus Base: 27	4%	19%	22%	11%	44%	100%

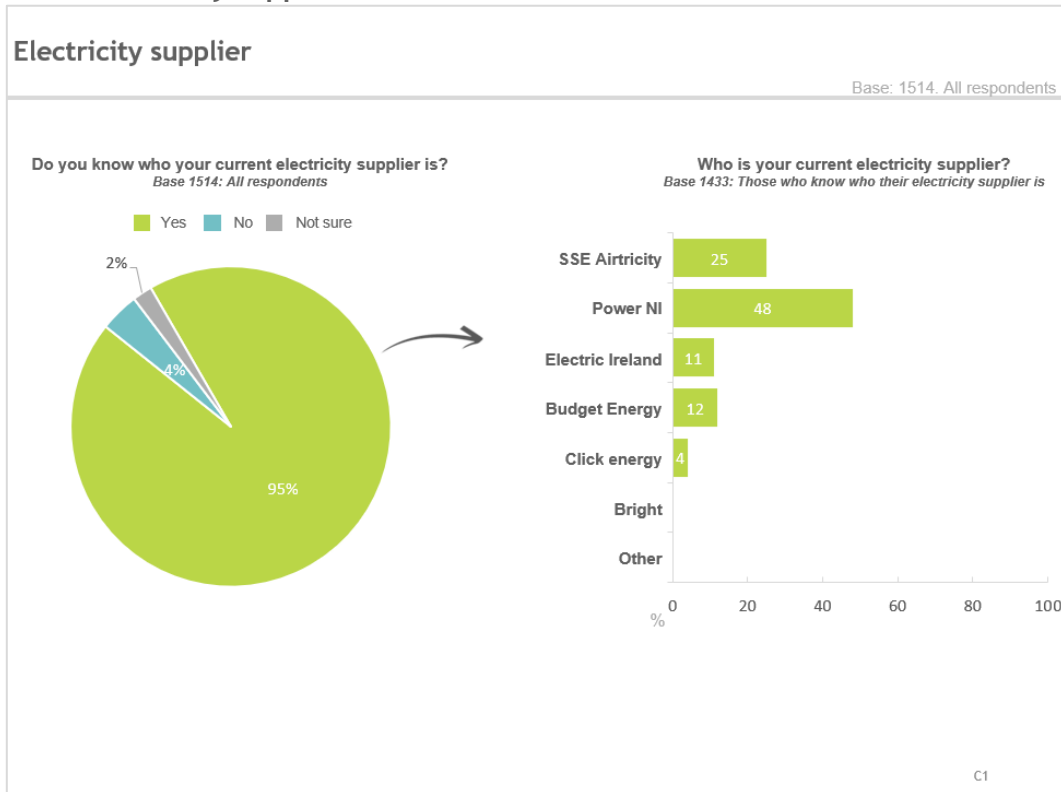


## Energy supplier

### Electricity supplier

The vast majority (95%) were aware of who their electricity supplier was. The most common electricity supplier was Power NI at 48%, followed by SSE Airtricity at 25%.

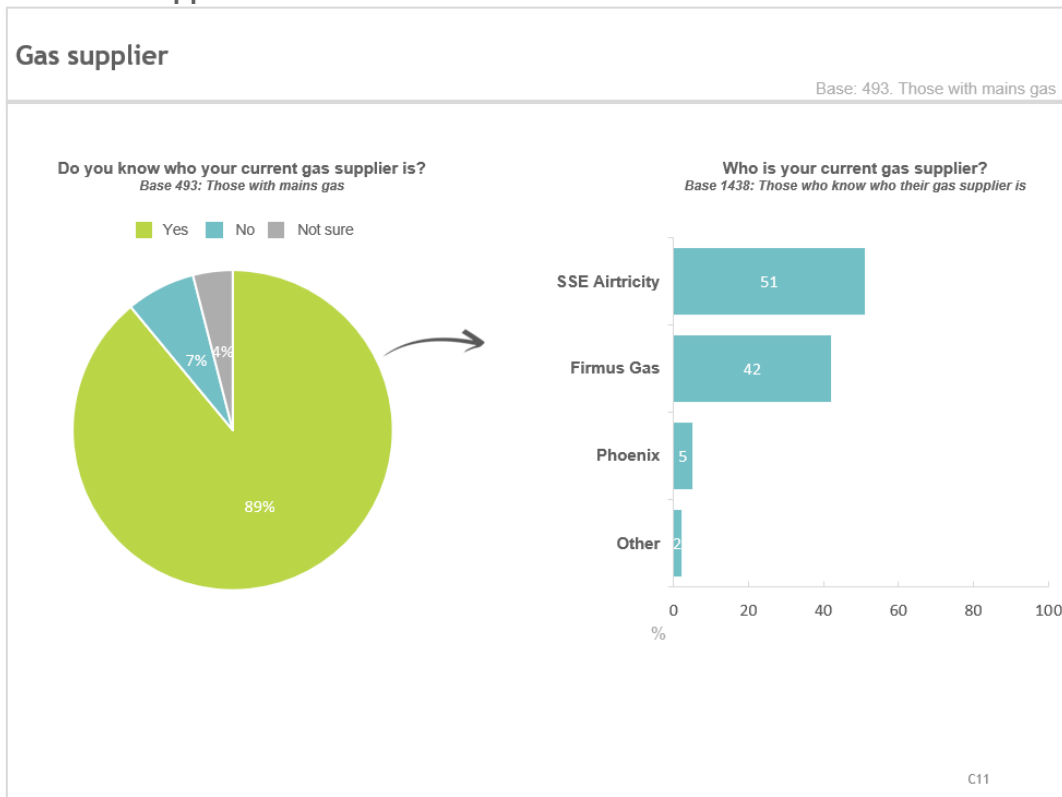
Figure 4.6 Electricity supplier



### Gas supplier

Of those who were aware of their gas supplier (89%), SSE Airtricity was the most common at 51% followed by Firmus Gas at 42%. One in 20 (5%) believed that Phoenix Gas was still their supplier and 2% cited other suppliers.

Figure 4.7 Gas supplier



# 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;
- Cost of electricity in Northern Ireland compared to GB and ROI; and
- Paying extra on bill.

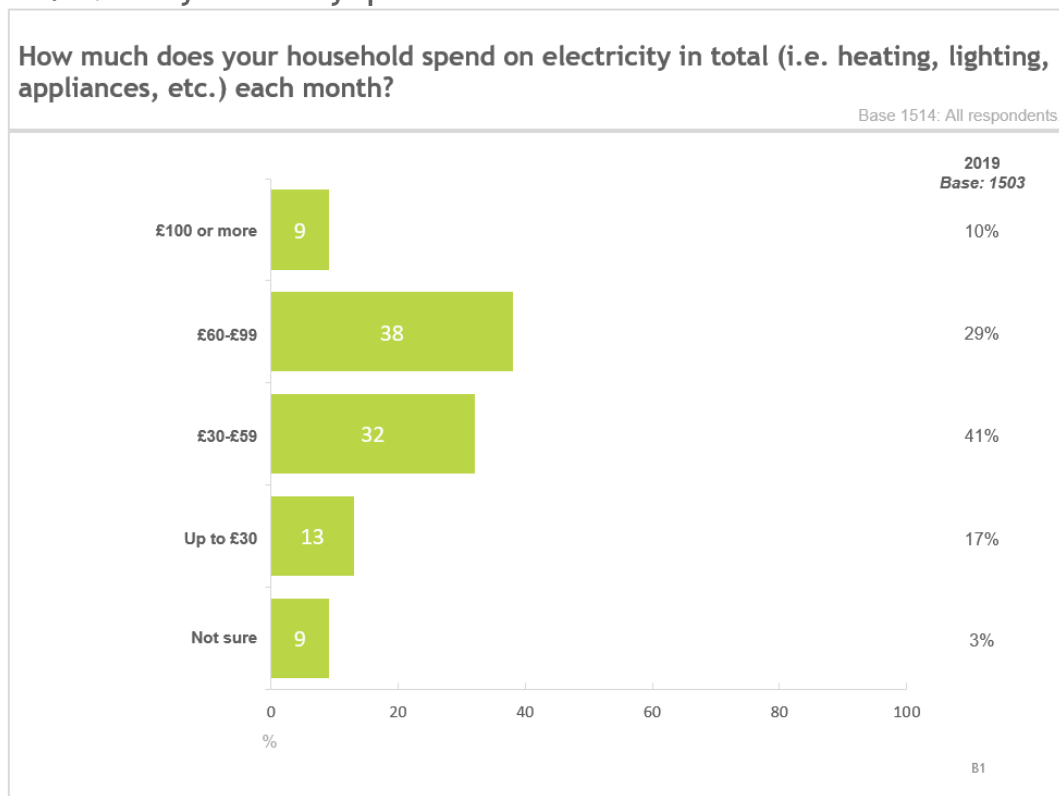
## Key findings

- Less than half (47%) spend £60 or more on their electricity per month; an increase from 39% in 2019. In terms of heating, 43% of gas consumers have a monthly spend of £30 to £59, although 33% of gas consumers say they spend more than this
- A prepayment meter was the most common method of paying for both electricity (39%) and gas (57%). Convenience was the most often cited reason for having one (73% of those with an electricity prepayment meter and 68% of those with a gas prepayment meter). The majority of electricity (96%) and gas (94%) 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.
- Half of electricity (50%) and gas (51%) customers reported that they do not know how the price of electricity or gas compares to other regions.
- 54% of respondents stated that they would be unwilling to pay anything extra on their bill for future investment. However, support for paying more has increased since the 2019 survey. While one third (32%, 19% in 2019) would be willing to pay extra for investment in projects to protect the environment, 27% (19% in 2019) would do so to support vulnerable customers and 18% (8% in 2019) to improve reliability of the network.

## Spend on electricity and heating

Respondents were asked what their monthly household spend on electricity was (see figure 5.1). 13% reported that they spend up to £30, with one third (32%) saying it was between £30 and £59. Respondents were most likely to spend between £60 and £99 (38%), while 9% said that they spend at least £100 per month.

Figure 5.1 Monthly electricity spend



Subgroup analysis revealed the following significant differences in the amount domestic consumers spend on electricity (see table 5.1):

- Younger respondents and those who rent privately spend less on electricity;
- Rural respondents (16%) were more likely to spend £100 or more per month than urban respondents (11%); and
- Respondents who had children (19%) were more likely than those without children (11%) to spend at least £100 per month.

**Table 5.1 Monthly electricity spend by demographics, location, tenure and children**

		Up to £30	£30-£59	£60-£99	£100 or more	Don't know	Total
Overall	All Base: 1514	9%	38%	32%	13%	9%	100%
Age	Under 35 Base:254	17%	52%	20%	7%	4%	100%
	35-44 Base:284	4%	38%	37%	15%	5%	100%
	45-64 Base:564	7%	34%	37%	16%	7%	100%
	65 plus Base: 373	9%	35%	30%	10%	16%	100%
	Urban Base: 912	9%	42%	30%	11%	8%	100%
Location	Rural Base: 602	8%	32%	34%	16%	10%	100%
	Owner occupied Base: 1167	7%	35%	34%	14%	10%	100%
Tenure	Private rented Base: 149	19%	54%	15%	9%	2%	100%
	Social rented Base: 175	9%	41%	32%	11%	7%	100%
	Children Base: 431	4%	35%	37%	19%	5%	100%
Children	No children Base: 1072	10%	39%	29%	11%	10%	100%



These findings suggest that spend on electricity has increased since the 2019 Domestic Tracker. 41% of respondents said that they spent between £30 and £59 in 2019 (compared to 32% in 2021), while 29% spent between £60 and £99 (38% in 2021) (see Figure 5.1).

### **Monthly spend on heating**

Respondents were asked how much they spend each month on heating their home (see Figure 5.2). Those with gas (91%) were more likely than those who use other means to heat their home (71%) to know how much their monthly spend was. The mode spend was between £30 and £59 for both gas users (43%) and those who used other means (29%). Approximately one in ten reported spending £100 or more per month on heating.

Figure 5.2 Monthly spend on heating

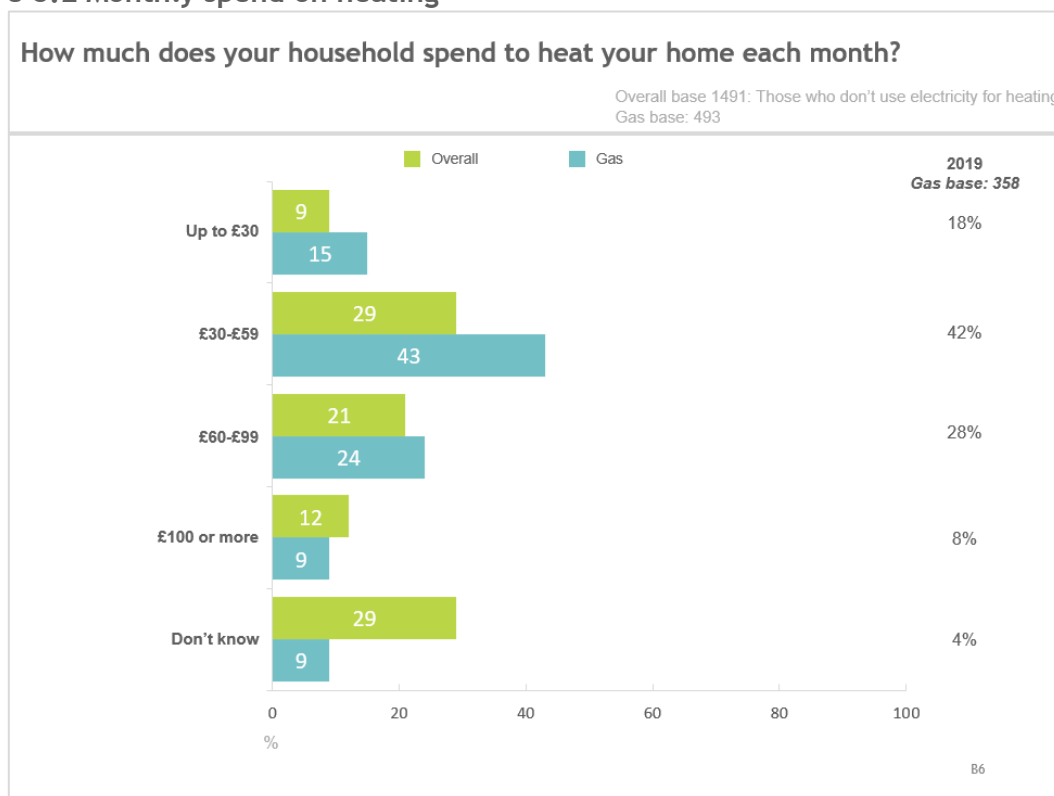


Table 5.2 Monthly spend on heating by method of payment

		Up to £30	£30-£59	£60-£99	£100 or more	Don't know	Total
Overall	All Base: 1491	9%	29%	21%	12%	29%	100%
Gas heating	Gas Base: 493	15%	43%	24%	9%	9%	100%
Gas payment method	Prepayment meter Base: 279	19%	47%	22%	7%	6%	100%
	Credit meter Base: 214	11%	38%	27%	12%	13%	100%
Oil heating	Oil Base: 970	5%	23%	20%	13%	38%	100%



Monthly spend on gas heating was similar to the 2019 study. 42% reported a monthly gas heating spend of £30 to £59 (42% in 2021), while 28% said that they spent between £60 and £99 (28% in 2021) (see Figure 5.2).

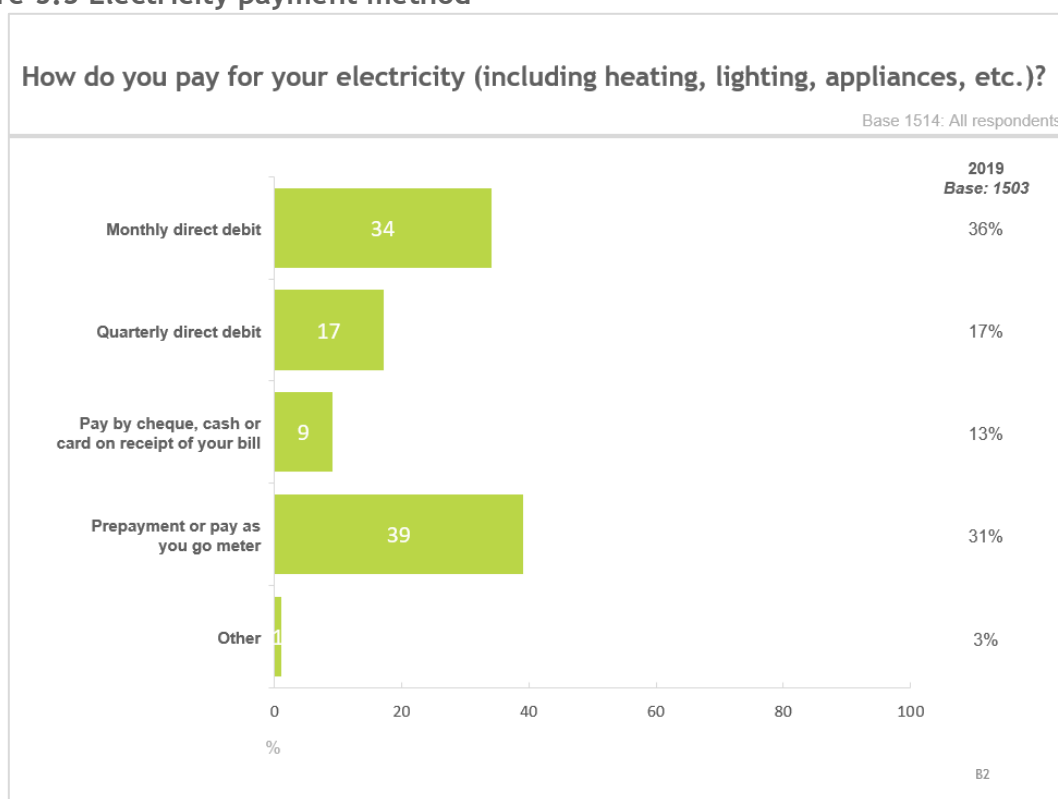
## Energy payment methods and tariff types

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 (39%) to pay for their electricity. In relation to credit meters, one third (34%) pay by monthly direct debit. 17% have a quarterly direct debit, while 9% pay by cheque, cash or card on receipt of their bill.

Figure 5.3 Electricity payment method



Methods of paying for electricity varied across various subgroups, with the following significant differences being observed (see Table 5.3):

- 18- to 34-year-olds (48%) were more likely to have an electricity prepayment meter than those aged 65 and over (20%). Respondents in the oldest age group (65 plus) were most likely to pay using cheque, cash or card (17%), therefore missing out on direct debit discounts;
- Those living in the most deprived areas (63%) were more likely to use a prepayment meter than those in the least deprived areas (22%). Monthly direct debit was the most popular method of payment for those living in the least deprived areas (51%, compared to 20% of those in the first quintile (most deprived));
- Domestic consumers living in social housing (79%) were more likely to use a prepayment meter than those who privately rent (64%) or own their home (30%);
- 26% of those who do not have access to the internet pay using cheque, cash or card, with 7% of those who do have access paying using this method; and
- Electricity customers with a prepayment meter were more likely to have switched supplier (50%) than customers with a credit meter.



**Table 5.3 Electricity payment method by demographics, deprivation, tenure, internet access and switching**

		Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment meter	Other	Total
Overall	All Base: 1514	34%	17%	9%	39%	1%	100%
Age	Under 35 Base:254	32%	14%	5%	48%	0%	100%
	35-44 Base:284	29%	11%	4%	56%	1%	100%
	45-64 Base:564	35%	18%	7%	39%	1%	100%
	65 plus Base: 373	38%	22%	17%	20%	3%	100%
	1 - Most deprived Base: 283	20%	7%	8%	63%	1%	100%
MDM Quintile	2 Base: 272	24%	19%	8%	47%	1%	100%
	3 Base: 321	31%	19%	11%	39%	1%	100%
	4 Base: 335	42%	19%	9%	27%	2%	100%
	5 - Least deprived Base: 303	51%	20%	6%	22%	1%	100%
	Tenure	Own home Base: 1167	40%	19%	9%	30%	1%
Private renting Base: 149		17%	10%	7%	64%	2%	100%
Social housing Base: 175		7%	7%	6%	79%	1%	100%
Internet access	Yes Base: 1366	35%	16%	7%	40%	1%	100%
	No Base: 148	24%	24%	26%	24%	2%	100%
Electricity switching	Switchers Base: 469	37%	10%	2%	50%	1%	100%
	Non-switchers Base: 1045	33%	20%	12%	34%	2%	100%

Over half (55%) reported that they were on their supplier's standard variable tariff, followed by 11% who were on a promotional tariff. One third (33%) were unsure what tariff they were on for electricity, with this more likely to be the case for those aged 65 and over (42%, compared to 24% of 18- to 34-years-olds). Respondents who had switched their electricity supplier in the last three years were more likely to be on a promotional tariff (25%) compared to non-switchers (5%).

Figure 5.4 Electricity tariff

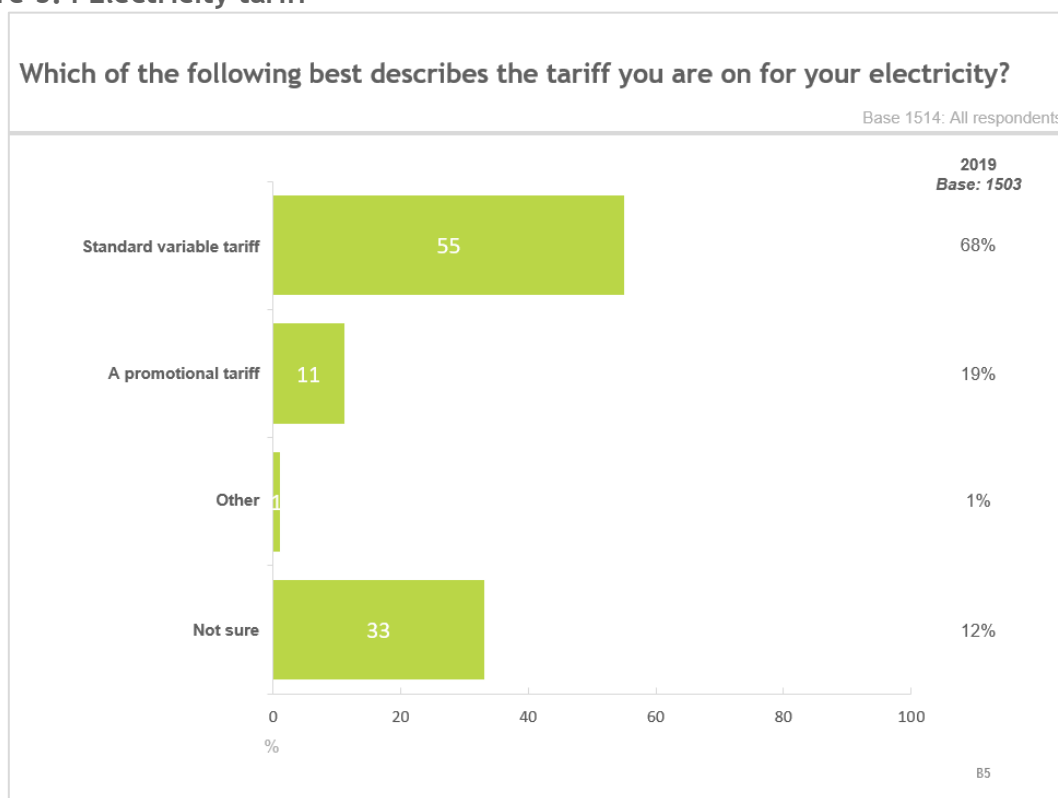


Table 5.4 Electricity tariff by demographics and switching

		Standard variable tariff	Promotional tariff	Other	Don't know	Total
Overall	All Base: 1514	55%	11%	1%	33%	100%
Age	Under 35 Base:254	60%	15%	1%	24%	100%
	35-44 Base:284	52%	13%	1%	34%	100%
	45-64 Base:564	56%	14%	1%	29%	100%
	65 plus Base: 373	51%	5%	1%	42%	100%
	Electricity switching	Switchers Base: 469	48%	26%	1%	25%
	Non-switchers Base: 1045	58%	5%	1%	37%	100%

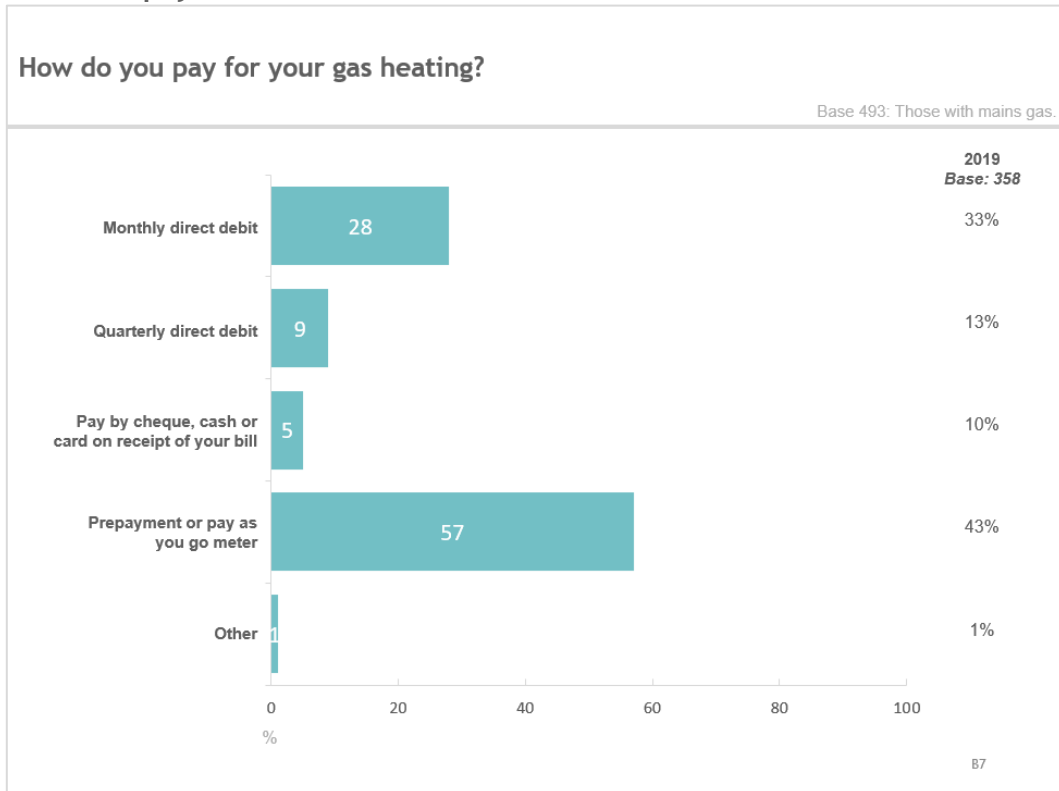


The use of direct debit has parallels with the responses obtained in the 2019 Domestic Tracker. 36% of respondents in the 2019 survey paid for electricity by monthly direct debit (34% in 2021), while 17% paid using quarterly direct debit (17% in 2021). However, prepayment meters are more prevalent in the present study (39%) compared to the 2019 study (31%) (see Figure 5.3). Also fewer households now report having a standard variable tariff (68% in 2019, 55% in 2021) or a promotional tariff (19% in 2019, 11% in 2021) (see Figure 5.4).

### Gas

Prepayment meters were also the most common method of paying for gas heating, with 57% of respondents saying they use one to pay for their gas. This was followed by one quarter (28%) who pay by monthly direct debit, and 9% who have a quarterly direct debit.

Figure 5.5 Gas payment method



There were similar differences in the method of payment for gas customers as for electricity customers (see Table 5.5):

- Two thirds (67%) of 18- to 34-year-olds have a prepayment meter for gas, compared to under one third (31%) of those aged 65 plus. In contrast, older respondents (38%) were more likely to be on a monthly direct debit than younger respondents (20%);
- Gas prepayment meters were more common in the most deprived areas (81%) than in the least deprived (35%); and
- Those living in social housing (89%) were more likely to have a prepayment meter than those who own their home (40%).

**Table 5.5 Gas payment method by demographics, deprivation and tenure**

		Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment meter	Other	Total
Overall	All Base: 493	28%	9%	5%	57%	1%	100%
Age	Under 35 Base: 129	20%	6%	5%	67%	1%	100%
	35-44 Base: 100	25%	8%	3%	64%	-	100%
	45-64 Base: 184	33%	7%	5%	55%	-	100%
	65 plus Base: 74	38%	18%	11%	31%	3%	100%
	1 - Most deprived Base: 129	11%	4%	5%	81%	-	100%
MDM Quintile	2 Base: 62	26%	3%	5%	66%	-	100%
	3 Base: 74	28%	5%	7%	58%	1%	100%
	4 Base: 81	30%	16%	5%	48%	1%	100%
	5 - Least deprived Base: 147	44%	14%	6%	35%	1%	100%
	Own home Base: 320	39%	13%	7%	40%	1%	100%
Tenure	Private renting Base: 65	11%	-	3%	85%	2%	100%
	Social housing Base: 99	5%	3%	3%	89%	-	100%

Two thirds (65%) of households with gas heating reported that they were on a standard variable tariff with their supplier, with 5% being on a promotional tariff. However, almost one third (30%) were unsure what tariff they were on (see Figure 5.6). Again, subgroup analysis of significant differences showed that older respondents (42%, compared to 26% of 18- to 34-year-olds) were the most likely age group to be unsure of what tariff they were on, while gas consumers who had switched suppliers in the last three years (29%) were more likely to be on a promotional tariff than those who had not switched (4%) (see Table 5.6).

Figure 5.6 Gas tariff

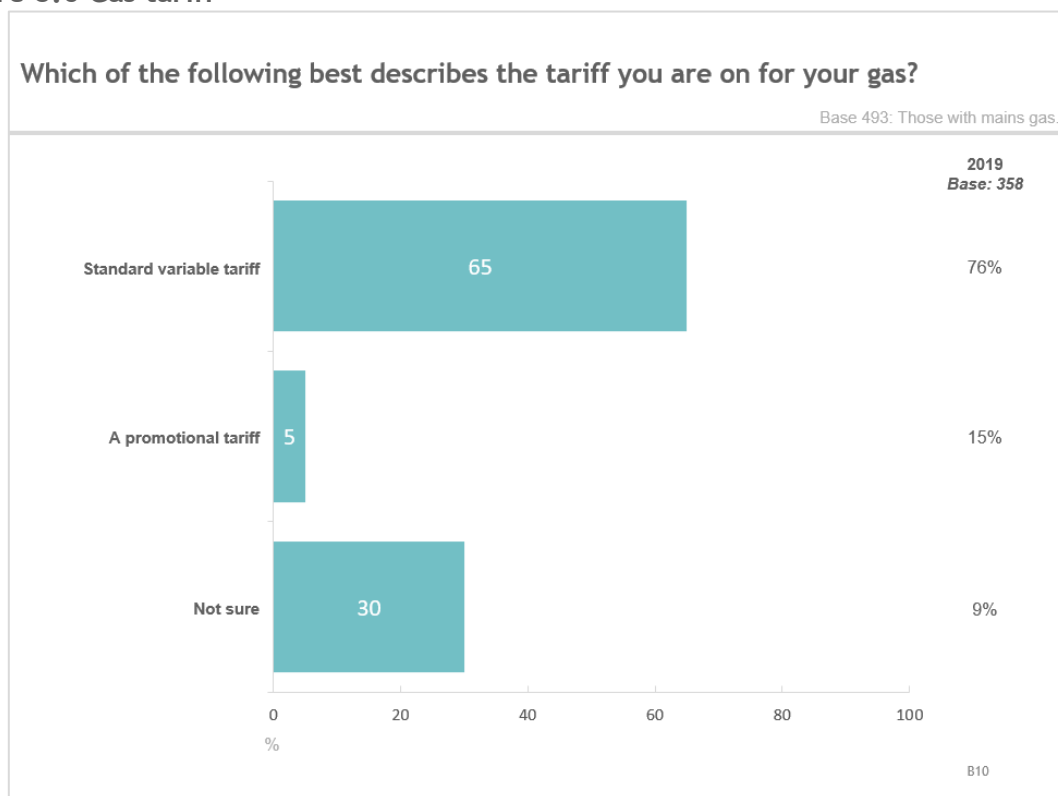


Table 5.6 Gas tariff by demographics and switching

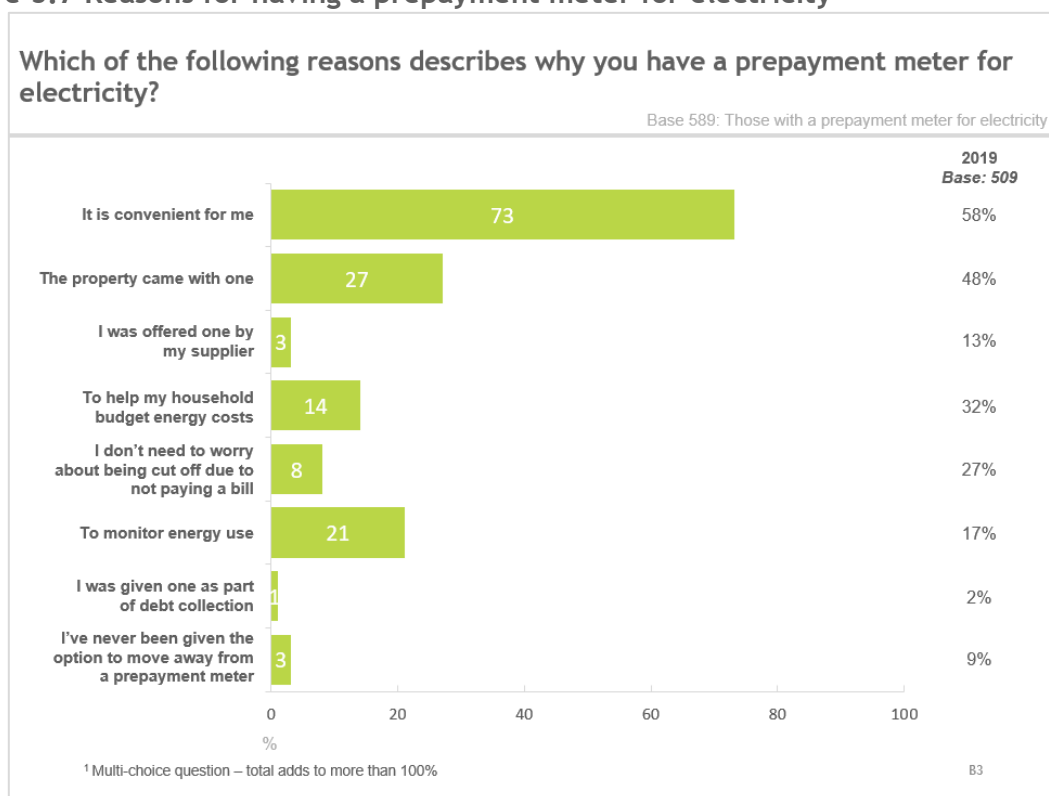
		Standard variable tariff	Promotional tariff	Don't know	Total
Overall	All Base: 493	65%	5%	30%	100%
Age	Under 35 Base: 129	71%	4%	26%	100%
	35-44 Base: 100	58%	6%	36%	100%
	45-64 Base: 184	70%	5%	25%	100%
	65 plus Base: 74	51%	7%	42%	100%
Gas switching	Switchers Base: 28	57%	29%	14%	100%
	Non-switchers Base: 465	65%	4%	31%	100%

## Prepayment meters

### Electricity

Of those respondents with a prepayment meter for electricity, three quarters (73%) reported that the reason they have one is because it is convenient for them, while one quarter (27%) said that the property came with one. Monitoring energy use (21%) and helping with budgeting energy costs (21%) were also mentioned as reasons for having a prepayment meter. Although convenience was the most popular reason for all age groups, those aged 65 plus (83%) were significantly more likely to give this a reason than those aged between 18 and 34 (56%), who were more likely to mention that their property came with one installed (50%, compared to 5% of 65 plus respondents) (see Table 5.7).

Figure 5.7 Reasons for having a prepayment meter for electricity

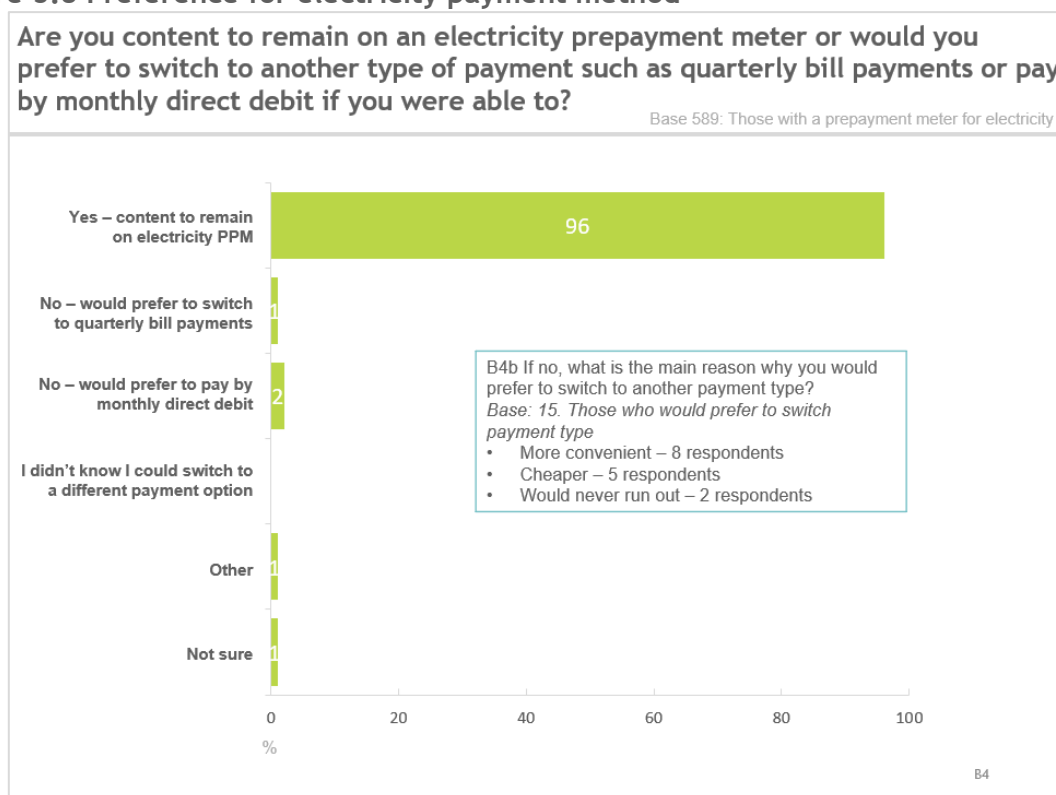


**Table 5.7 Reasons for having a prepayment meter for electricity by demographics**

	Age				
	Overall Base: 589	Under 35 Base: 123	35-44 Base: 159	45-64 Base: 221	65 plus Base: 76
It is convenient	73%	56%	74%	77%	83%
The property came with one	27%	50%	35%	16%	5%
Offered one by supplier	3%	3%	2%	4%	7%
To help budget energy costs	14%	11%	11%	19%	11%
Don't need to worry about being cut off due to not paying a bill	8%	7%	7%	11%	9%
To monitor energy use	21%	11%	21%	26%	24%
Given one as part of debt collection	1%	-	1%	0%	1%
Never been given the option to move away from a prepayment meter	3%	5%	5%	1%	-
Other	0%	-	-	0%	-
Don't know	0%	-	-	0%	-

The vast majority (96%) of respondents with a prepayment meter were content to remain with one, while 3% confirmed that they would prefer to switch to quarterly or monthly payments.

**Figure 5.8 Preference for electricity payment method**





## Gas

Convenience (68%) was also the most common reason for having a gas prepayment meter, with one third (31%) saying that their property came with one. Having a prepayment meter to monitor energy use (16%) and to help with household budgeting (11%) were again mentioned as less common reasons. As with electricity prepayment meters, older respondents (83%) were more likely than younger respondents (46%) to mention convenience.

Figure 5.9 Reasons for having a prepayment meter for gas

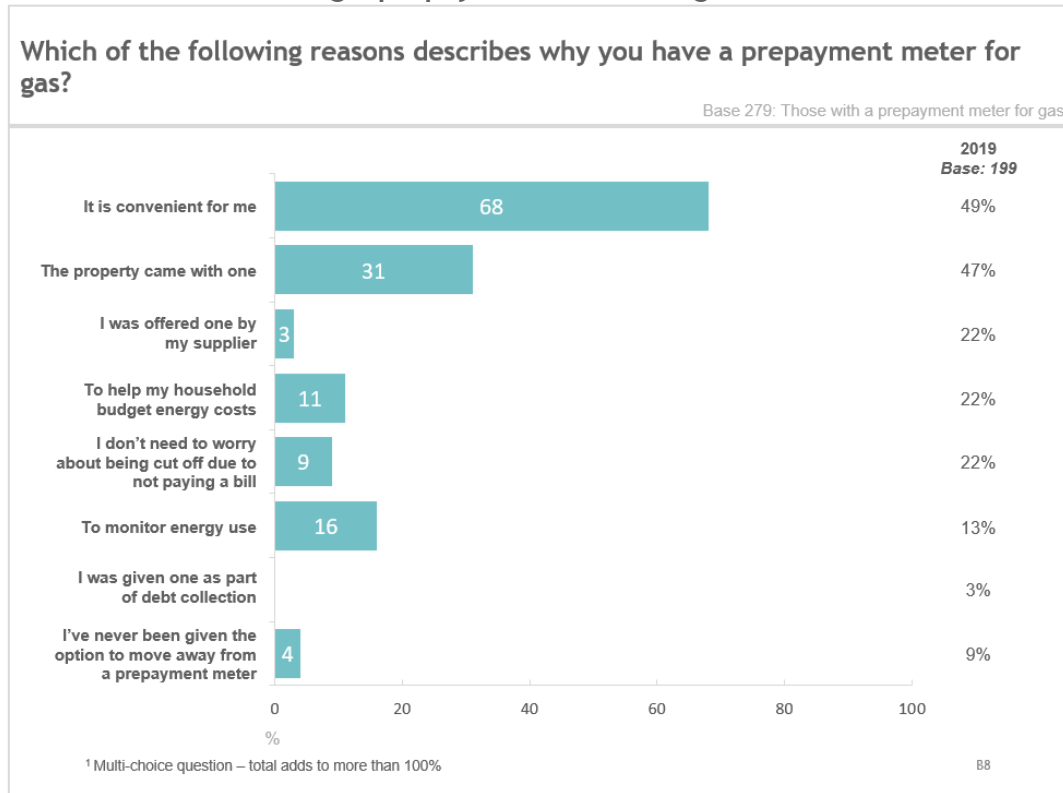
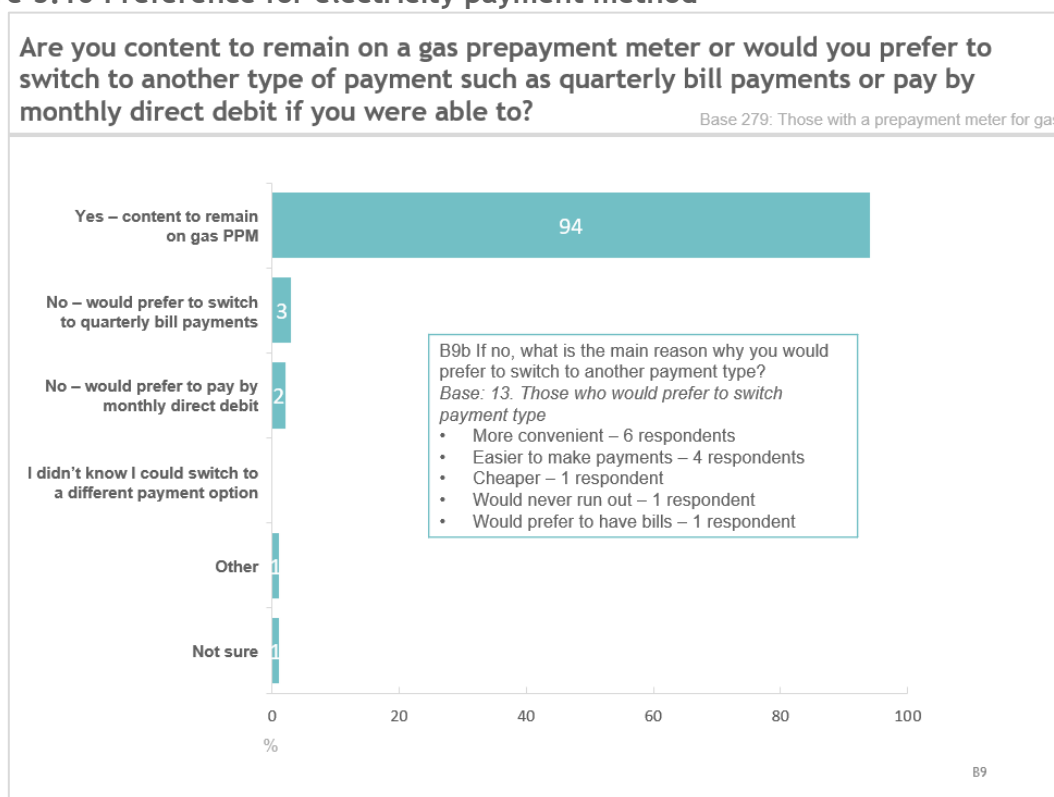


Table 5.9 Reasons for having a prepayment meter for gas by demographics

	Overall Base: 279	Age			
		Under 35 Base: 87	35-44 Base: 64	45-64 Base: 102	65 plus Base: 23
It is convenient	68%	46%	77%	78%	83%
The property came with one	31%	57%	19%	23%	4%
Offered one by supplier	3%	1%	3%	6%	-
To help budget energy costs	11%	9%	9%	14%	13%
Don't need to worry about being cut off due to not paying a bill	9%	7%	8%	14%	4%
To monitor energy use	16%	9%	16%	23%	22%
Given one as part of debt collection	0%	-	2%	-	-
Never been given the option to move away from a prepayment meter	4%	5%	5%	4%	4%
Don't know	0%	-	-	-	4%

The vast majority (94%) of respondents with a gas prepayment meter were content to remain using one, whereas 5% confirmed that they would prefer to switch to quarterly or monthly bill payments.

Figure 5.10 Preference for electricity payment method



## Cost of energy compared to other regions

Respondents were asked to compare the cost of electricity and gas in Northern Ireland to that in other regions such as the Republic of Ireland and Great Britain (see Figure 5.11). Half (50%) of respondents were unsure of how the cost of electricity compares, while 28% thought that electricity is more expensive in NI. 12% thought that the price is similar across regions, and 9% believe NI is cheaper for electricity.

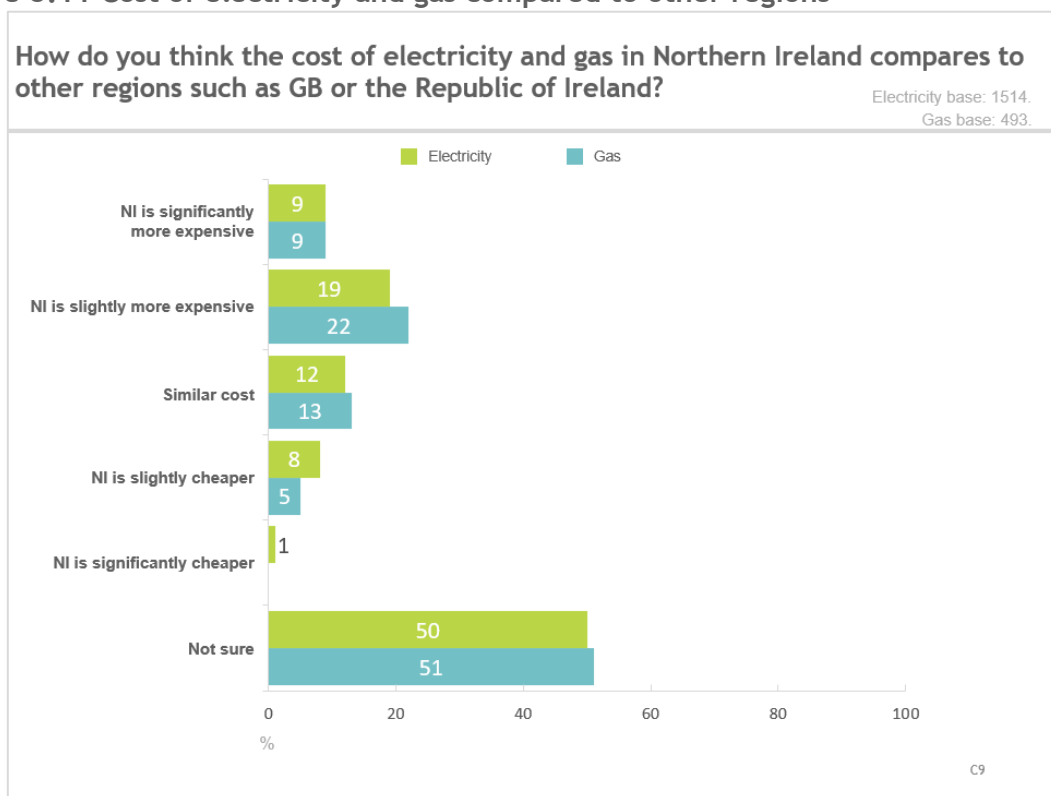
Those who pay for electricity using cheque, cash or card (63%) were more likely to not know how prices compare in different regions.

Almost one third (31%) of gas consumers thought that NI was 'slightly' or 'significantly' more expensive for gas than other regions, compared to 5% who believed it was cheaper. However, 51% did not know how gas prices compared between regions, with respondents who have a prepayment meter (58%) more likely to be unsure.

There were several significant differences identified among various subgroups (see Tables 5.10 and 5.11):

- 45- to 64-year-olds (35%) were the most likely to think electricity was more expensive in NI, while respondents aged 18 to 34 were the least likely to say NI is more expensive for both electricity and gas (20% and 21% respectively);
- One third (33%) of ABC1 respondents said that NI is more expensive for electricity, compared to one quarter (25%) of C2DE respondents;
- Those living in the least deprived areas (35%) were more likely than those living in the most deprived areas (27%) to say NI was more expensive for electricity; and
- Those who have no access to the internet (61%) and who were not confident internet users (59%) were more likely to not know how electricity prices compare across regions.

**Figure 5.11 Cost of electricity and gas compared to other regions**



**Table 5.10 Cost of electricity compared to other regions by demographics, deprivation and internet access**

		NI is more expensive	Similar cost	NI is cheaper	Not sure	Total
Overall	All Base: 1514	29%	12%	9%	50%	100%
Age	Under 35 Base: 254	21%	16%	13%	50%	100%
	35-44 Base: 284	23%	12%	12%	53%	100%
	45-64 Base: 564	35%	13%	8%	44%	100%
	65 plus Base: 373	29%	9%	6%	56%	100%
SEG	ABC1 Base: 725	33%	12%	10%	46%	100%
	C2DE Base: 738	25%	12%	8%	54%	100%
MDM Quintile	1 - Most deprived Base: 283	27%	13%	11%	50%	100%
	2 Base: 272	27%	12%	11%	50%	100%
	3 Base: 321	24%	12%	8%	56%	100%
	4 Base: 335	30%	8%	10%	52%	100%
	5 - Least deprived Base: 303	35%	15%	7%	43%	100%
Internet access	Yes Base: 1366	30%	12%	9%	49%	100%
	No Base: 148	18%	10%	11%	61%	100%
Confidence using internet	Not confident Base: 330	23%	12%	6%	59%	100%
	Neither Base: 233	27%	14%	8%	51%	100%
	Confident Base: 951	31%	11%	10%	47%	100%

**Table 5.11 Cost of gas compared to other regions by demographics**

		NI is more expensive	Similar cost	NI is cheaper	Not sure	Total
Overall	All Base: 493	30%	13%	5%	51%	100%
Age	Under 35 Base: 129	20%	17%	9%	54%	100%
	35-44 Base: 100	31%	12%	3%	54%	100%
	45-64 Base: 184	35%	12%	4%	48%	100%
	65 plus Base: 74	35%	14%	4%	47%	100%

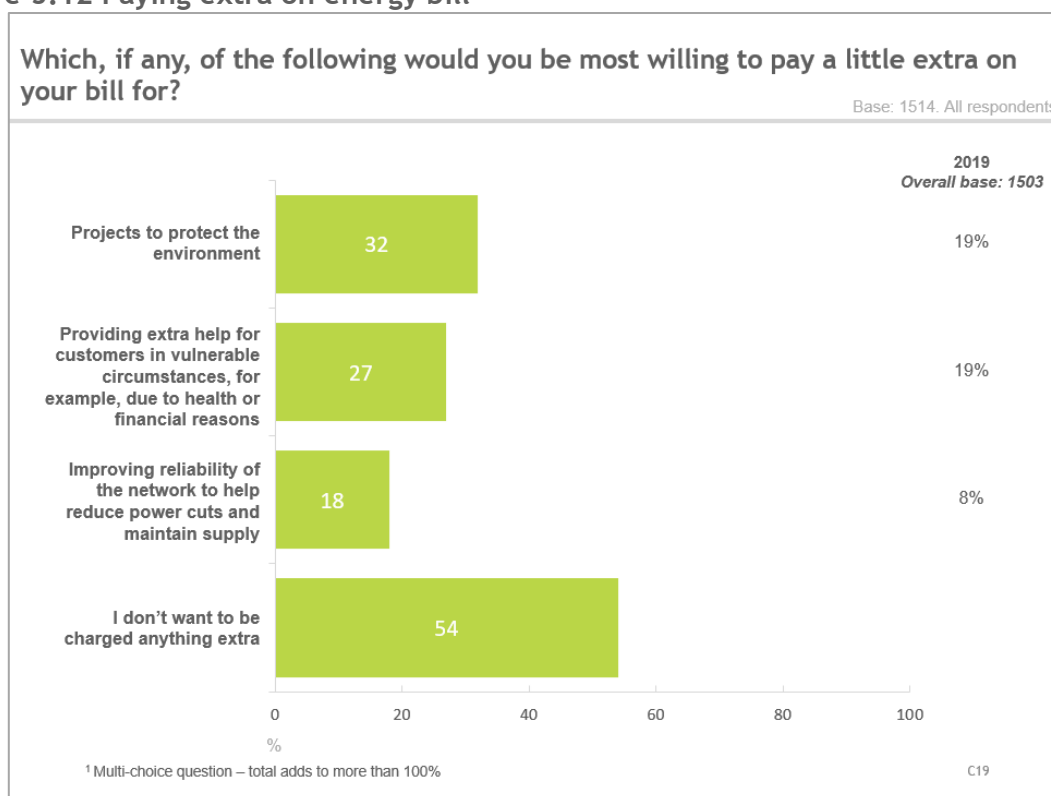
## Paying extra on bill

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 they would be willing to pay a little extra for on their bills (see Figure 5.12).

Over half of respondents overall (54%) reported that they would not be willing to pay anything extra. Around one third of consumers (32%) stated that they would be willing to pay extra on projects to protect the environment. Slightly fewer were willing to invest in extra help for vulnerable customers (27%), while 18% would be willing to pay extra to improve the reliability of the network.

Respondents in the 18-34 age group (39%) and those who were in the ABC1 category (37%) were significantly more likely to support paying extra to protect the environment than those aged 65 plus (24%) and those in the C2DE category (27%). Domestic consumers who live in the most deprived areas (63%) were less willing to pay extra on their bill than those in the least deprived areas (52%). Those on a prepayment meter for electricity (58%) and for gas (58%) were more likely to be unwilling to spend anything extra on their bill than those on a credit meter for electricity (52%) and gas (49%) (see Table 5.12).

Figure 5.12 Paying extra on energy bill



**Table 5.12 Paying extra on energy bill by demographics, MDM quintile 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 <i>Base: 1514</i>	32%	27%	18%	54%
Age	Under 35 <i>Base: 254</i>	39%	28%	20%	51%
	35-44 <i>Base: 284</i>	33%	32%	19%	52%
	45-64 <i>Base: 564</i>	31%	25%	15%	57%
	65 plus <i>Base: 373</i>	24%	27%	18%	57%
SEG	ABC1 <i>Base: 725</i>	37%	30%	19%	52%
	C2DE <i>Base: 738</i>	27%	25%	16%	57%
MDM Quintile	1 - Most deprived <i>Base: 283</i>	25%	23%	14%	63%
	2 <i>Base: 272</i>	31%	26%	19%	53%
	3 <i>Base: 321</i>	30%	30%	14%	55%
	4 <i>Base: 335</i>	37%	29%	19%	50%
	5 - Least deprived <i>Base: 303</i>	35%	27%	20%	52%
Electricity payment method	Prepayment meter <i>Base: 589</i>	29%	26%	16%	58%
	Credit meter <i>Base: 925</i>	33%	28%	19%	52%
Gas payment method	Prepayment meter <i>Base: 279</i>	29%	25%	14%	58%
	Credit meter <i>Base: 214</i>	38%	31%	18%	49%



Priority areas for investment remained consistent to the 2019 Domestic Tracker, but support for these extra costs has increased, with domestic consumers now more willing to pay extra for environmental protection projects (19%, compared to 32% in 2021) and to provide support for vulnerable customers (19%, compared to 27% in 2021) (see Figure 5.12).

# 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;
- Treatment;
- 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

- Post was the most common method of receiving correspondence from both electricity (51%) and gas (47%) suppliers. 71% of electricity customers reported at least looking at the correspondence (either glancing at it or reading it in full), with 77% of those respondents saying they understood the information. Gas consumers were less likely to read or glance at the correspondence (63%), although 74% of those that did agree that the information was clear and understandable.
- Around two thirds said they trust their electricity supplier to treat them fairly (69%) and to give them a fair price (64%), with 10% and 13% respectively reporting that they distrust their electricity supplier in these regards. Less than two thirds (65%) of gas consumers said they trust their supplier to treat them fairly in any dealings and 12% stated that they distrust them, while 60% said they trust and 16% distrust them to offer a fair price.
- The majority (87%) of domestic consumers report satisfaction with their electricity supplier with 3% expressing dissatisfaction. 83% were satisfied with their gas supplier and 4% were dissatisfied.
- 9% contacted their electricity supplier in the last year, with switching energy contract (34%), querying a bill (19%) and payment issues (15%) the most common reasons for this. Of those that made contact, 79% found it easy to get in touch, 79% thought they were listened to, 78% felt they were treated fairly, and 75% said that their electricity supplier was supportive.



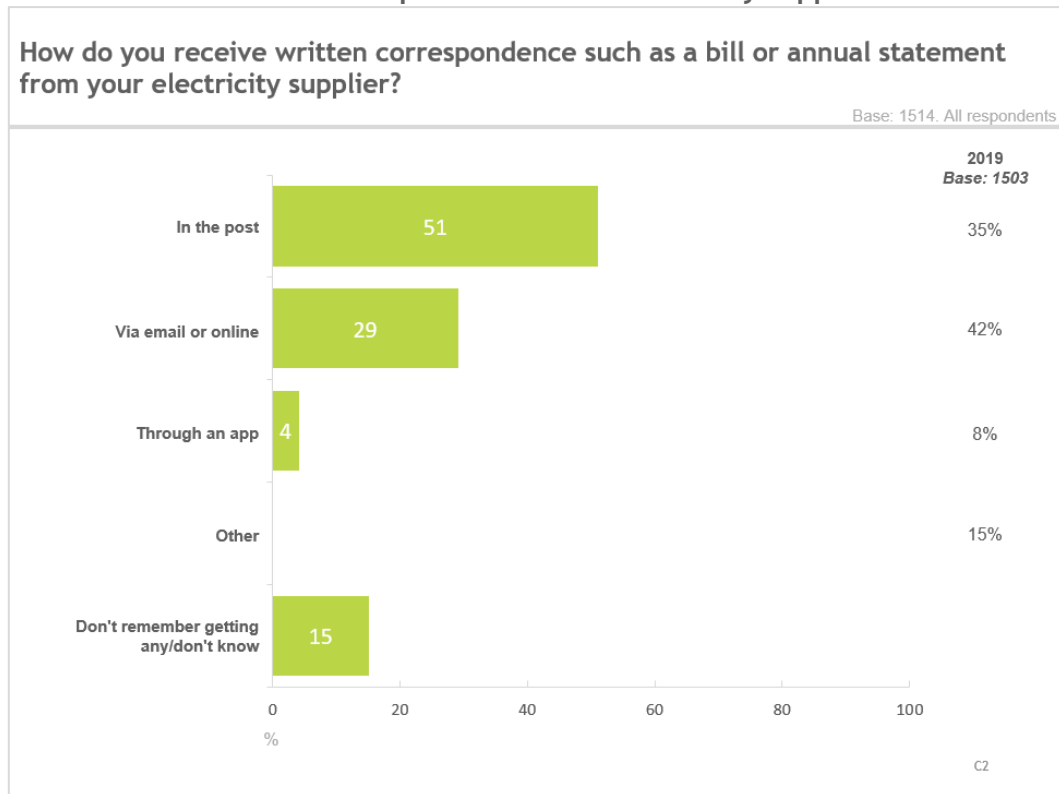
## Written correspondence

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

### **Electricity**

Half (51%) of domestic consumers receive written correspondence from their electricity supplier in the post, while 29% receive it via email or online. 15% of respondents did not remember receiving any correspondence or were unsure in what form it came.

**Figure 6.1 Form of written correspondence from electricity supplier**



Older respondents, aged 65 plus were most likely to receive their correspondence by post (67%), while those aged between 18 and 34 and between 45 and 64 were the most likely age groups to receive theirs through email or an app (both 34%). However, younger respondents were more likely to be unsure in what form they receive correspondence or if they receive it at all (21%).

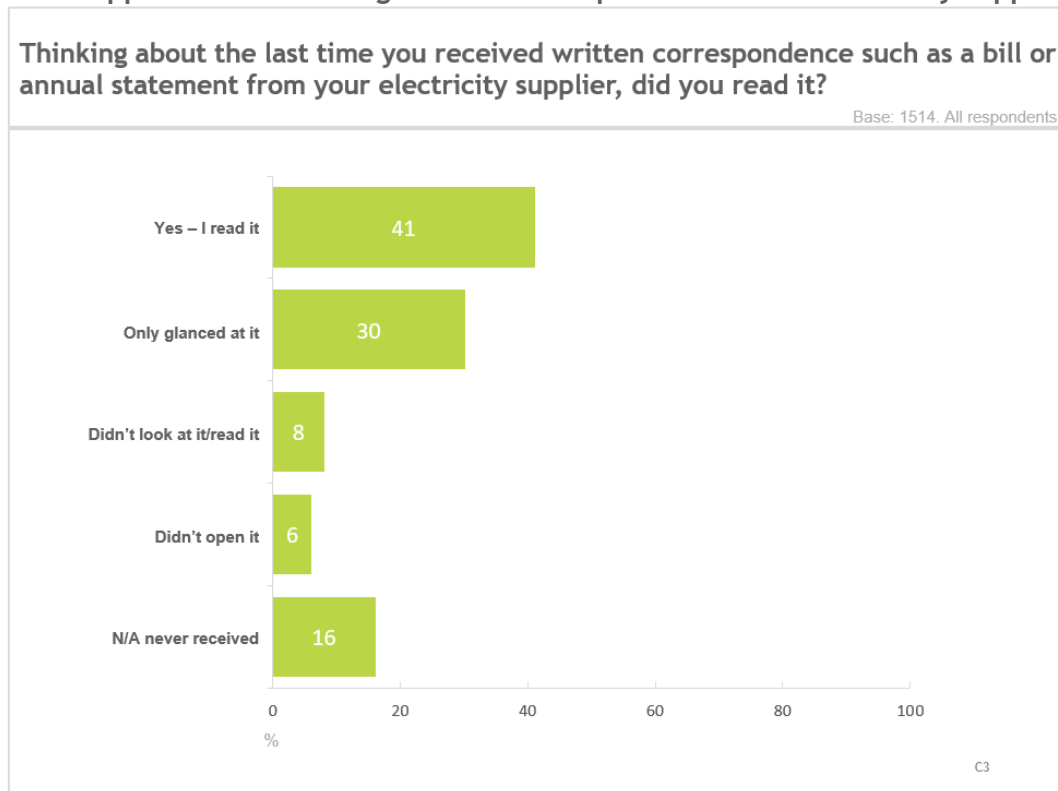
Further analysis also revealed that those living in the fifth quintile (least deprived) were most likely to receive correspondence via email or an app (44%) and least likely to receive theirs by post (40%).

**Table 6.1 Form of written correspondence from electricity supplier by demographics and quintile of deprivation**

		In the post	Email / online	Through an app	Other	Not sure	Total
Overall	All Base: 1514	51%	29%	4%	0%	15%	100%
Age	Under 35 Base:254	38%	34%	7%	-	21%	100%
	35-44 Base:284	43%	29%	8%	1%	20%	100%
	45-64 Base:564	49%	34%	3%	0%	15%	100%
	65 plus Base: 373	67%	23%	-	0%	10%	100%
Location	Urban Base: 912	47%	31%	4%	0%	18%	100%
	Rural Base: 602	58%	27%	2%	0%	12%	100%
MDM Quintile	1 - Most deprived Base: 283	52%	19%	5%	0%	24%	100%
	2 Base: 272	53%	26%	2%	-	19%	100%
	3 Base: 321	58%	24%	3%	1%	15%	100%
	4 Base: 335	53%	33%	4%	-	10%	100%
	5 - Least deprived Base: 303	40%	44%	4%	0%	11%	100%

The majority (71%) stated that they read or glanced at the latest correspondence they received from their electricity supplier, while 14% did not look at it or open it. 16% reported that they did not receive any written correspondence from their electricity supplier.

**Figure 6.2 Approach to receiving written correspondence from electricity supplier**



Those with a prepayment meter for electricity (30%) were less likely to say they read written correspondence than credit customers<sup>4</sup> (47%) but were more likely to say they never received any correspondence from their supplier (32% compared to 5% without).

Those who were in the high or medium vulnerability group (44%) were more likely to read the correspondence than those who were not vulnerable (39%), as were those aged 65 plus (47%) when compared to 18- to 34-year-olds (32%). Younger respondents (22% of 18- to 34-year-olds, 21% of 35- to 44- year olds) were also more likely to report that they did not receive any correspondence (see Table 6.2).

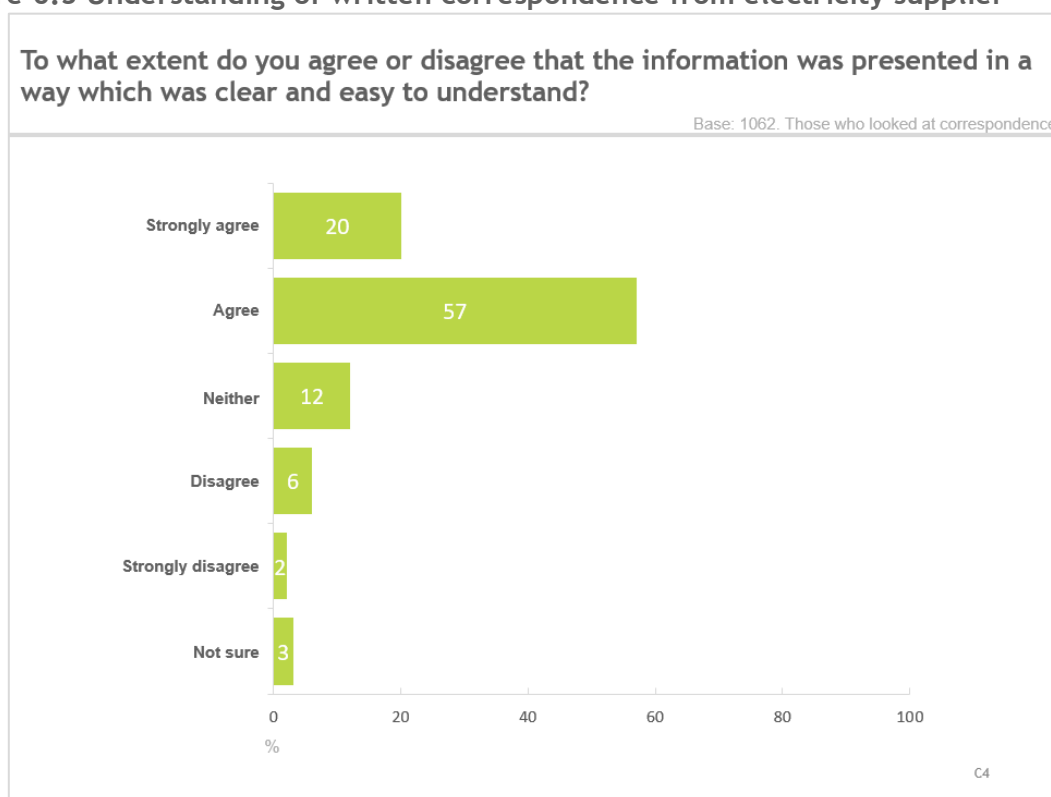
<sup>4</sup> Credit customers or those who have a credit meter refers to respondents who do not use a prepayment meter to pay for their electricity or gas.

**Table 6.2 Approach to receiving written correspondence from electricity supplier by demographics, vulnerability, payment method and supplier**

		Read it	Glanced at it	Didn't read it	Didn't open it	Never received	Total
Overall	All Base: 1514	41%	30%	8%	6%	16%	100%
Age	Under 35 Base:254	32%	28%	11%	7%	22%	100%
	35-44 Base:284	38%	26%	7%	7%	21%	100%
	45-64 Base:564	40%	32%	7%	6%	15%	100%
	65 plus Base: 373	47%	31%	8%	5%	9%	100%
Vulnerability	High/medium vulnerability Base: 597	44%	30%	8%	5%	13%	100%
	Low vulnerability Base: 133	36%	29%	7%	8%	20%	100%
	Not vulnerable Base: 784	39%	29%	8%	7%	17%	100%
Electricity payment method	Prepayment meter Base: 589	30%	25%	7%	6%	32%	100%
	Credit meter Base: 925	47%	33%	9%	6%	5%	100%

Of those who glanced at or read the written correspondence they received, three quarters (77%) agreed that the information had been presented in a way which was clear and easy to understand, compared to 8% who did not think that this was the case.

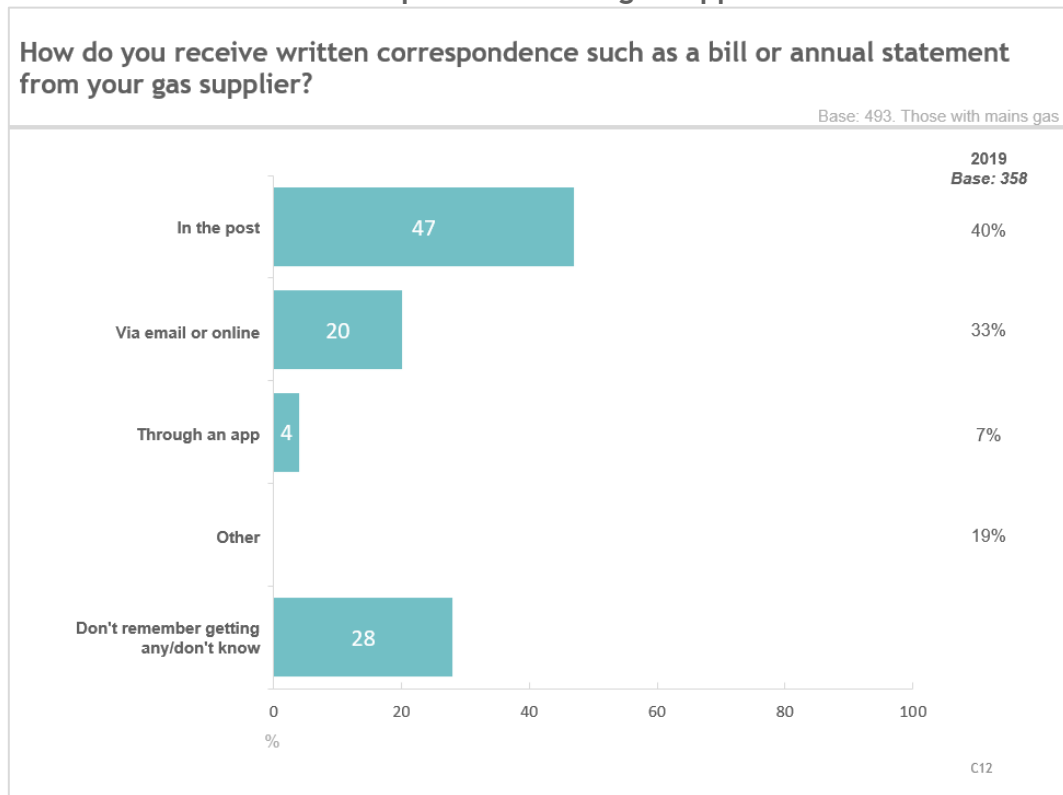
**Figure 6.3 Understanding of written correspondence from electricity supplier**



## Gas

Those with gas heating were more likely to receive correspondence from their supplier through the post (47%), while one in five (20%) obtain theirs in an email or online. 28% did not remember receiving any written correspondence from their supplier or in what form it came.

Figure 6.4 Form of written correspondence from gas supplier



Respondents who have a credit meter for gas (57%) were more likely to say they receive correspondence in the post compared to those with a prepayment meter (40%), who were again more likely to say they did not remember receiving any correspondence (44% compared to 7%).

The following significant differences among subgroups were also observed (see Table 6.3):

- 59% of gas customers aged 65 plus confirmed they receive their correspondence through the post, compared to 38% of 18- to 34-year-olds. Younger respondents (37%) were also more likely to not know in what form they receive correspondence compared to older respondents (22%);
- Email and online was a more common method amongst ABC1 respondents (30%, compared to 11% in the C2DE group); and
- Email and online was also more popular amongst those living in the least deprived areas (32%) than those in the most deprived areas (8%).

**Table 6.3 Form of written correspondence from gas supplier by demographics, deprivation and payment method**

		In the post	Email / online	Through an app	Other	Not sure	Total
Overall	All Base: 493	47%	20%	4%	0%	28%	100%
Age	Under 35 Base: 129	38%	19%	6%	-	37%	100%
	35-44 Base: 100	43%	21%	8%	-	28%	100%
	45-64 Base: 184	50%	22%	3%	1%	24%	100%
	65 plus Base: 74	59%	19%	-	-	22%	100%
	SEG	ABC1 Base: 242	48%	30%	2%	-	20%
	C2DE Base: 235	47%	11%	7%	0%	35%	100%
MDM Quintile	1 - Most deprived Base: 129	49%	8%	6%	-	37%	100%
	2 Base: 62	48%	21%	3%	-	27%	100%
	3 Base: 74	42%	18%	1%	-	39%	100%
	4 Base: 81	52%	21%	6%	-	21%	100%
	5 - Least deprived Base: 147	46%	32%	4%	1%	17%	100%
Gas payment method	Prepayment meter Base: 279	40%	10%	6%	0%	44%	100%
	Credit meter Base: 214	57%	34%	2%	-	7%	100%

Two in five (40%) gas customers stated that they read the last written correspondence they received from their supplier with 23% saying they only glanced at it. Although 9% said they did not read or open it, a further 29% reported to have never received any correspondence, including 44% of those with a gas prepayment meter and 40% of those aged 18 to 34 (see Figure 6.5 and Table 6.4).

Figure 6.5 Approach to receiving written correspondence from electricity supplier

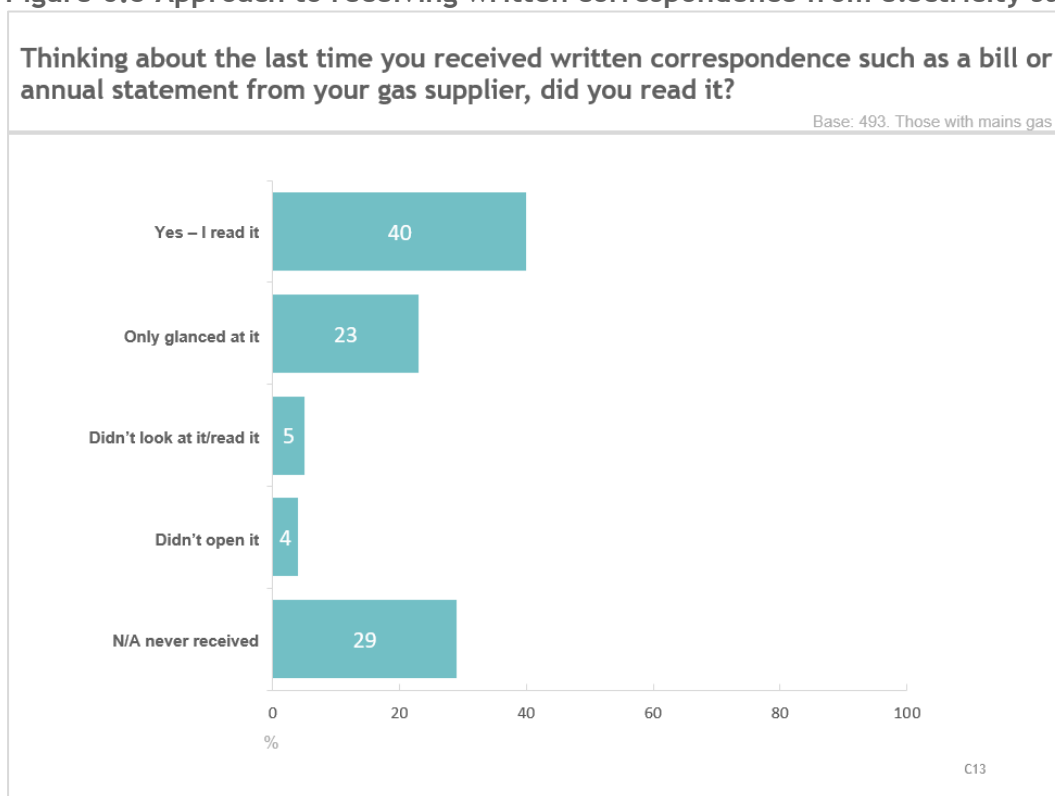


Table 6.4 Approach to receiving written correspondence from electricity supplier by demographics and payment method

		Read it	Glanced at it	Didn't read it	Didn't open it	Never received	Total
Overall	All Base: 493	40%	23%	5%	4%	29%	100%
Age	Under 35 Base: 129	29%	21%	5%	4%	40%	100%
	35-44 Base: 100	37%	24%	5%	4%	30%	100%
	45-64 Base: 184	44%	24%	4%	4%	24%	100%
	65 plus Base: 74	47%	22%	5%	5%	20%	100%
Gas payment method	Prepayment meter Base: 279	30%	19%	3%	4%	44%	100%
	Credit meter Base: 214	53%	28%	7%	4%	8%	100%

Three quarters (74%) agreed or strongly agreed that the information they had received was presented in a way which was clear and easy for them to understand. 13% disagreed with this, including 17% of customers with a credit meter and 14% of those on a prepayment meter (see Figure 6.6 and Table 6.5).



Figure 6.6 Understanding of written correspondence from electricity supplier

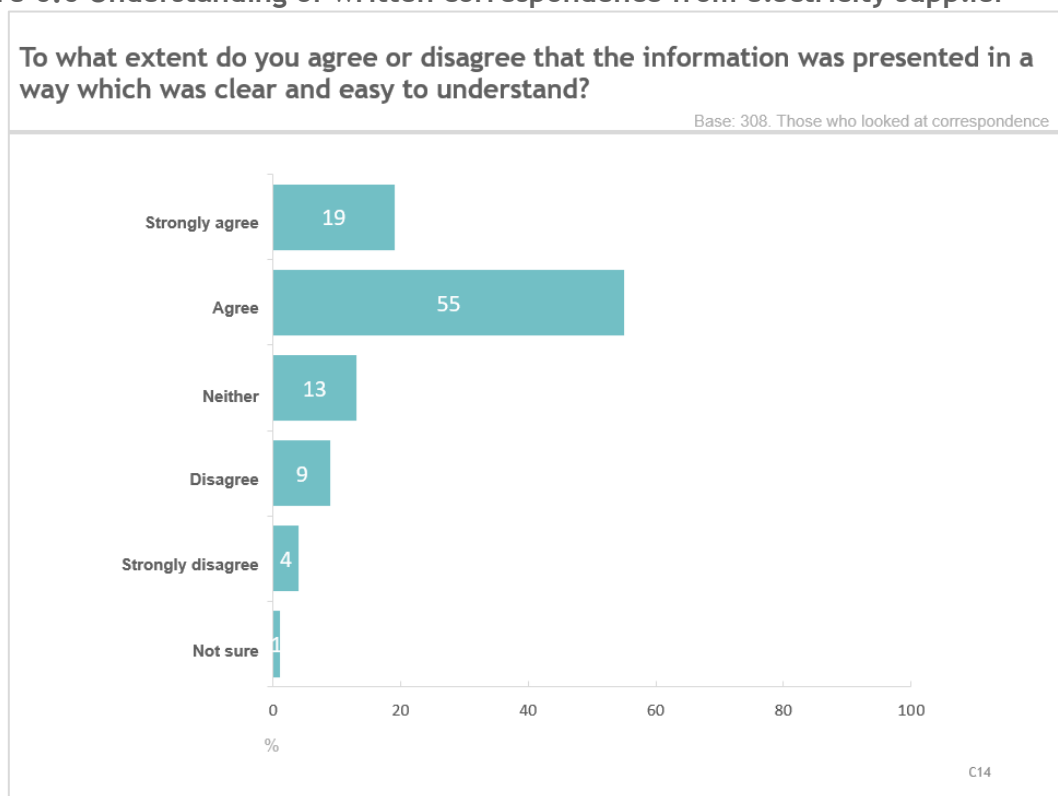


Table 6.5 Understanding of written correspondence from gas supplier by payment method

		Disagree	Neither	Agree	Not sure	Total
Overall	All Base: 308	12%	13%	74%	1%	100%
Gas payment method	Prepayment meter Base: 135	7%	16%	77%	1%	100%
	Credit meter Base: 173	17%	10%	72%	1%	100%

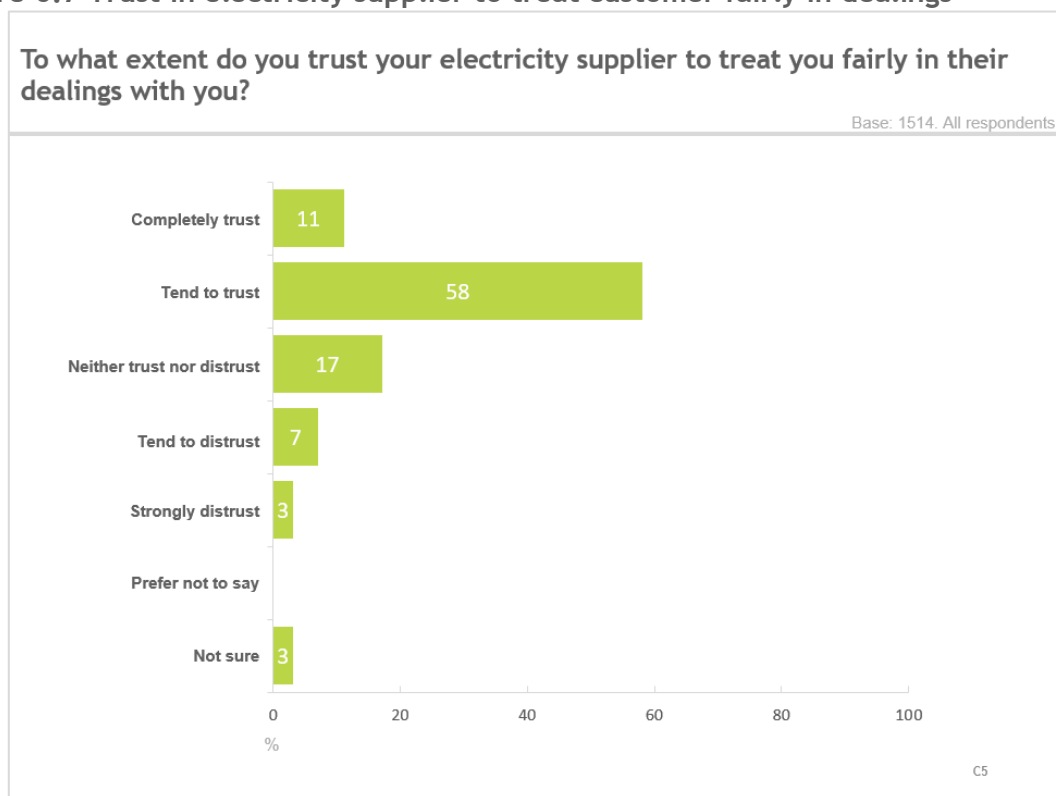
## Level of trust in electricity or gas supplier

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

### Electricity

Over two thirds (69%) of domestic consumers trust their electricity supplier to treat them fairly in their dealings, while 64% trust their supplier to give a fair price. This is compared to 10% and 13% respectively who did not trust their supplier to treat them fairly or to provide a fair price (see Figure 6.7).

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



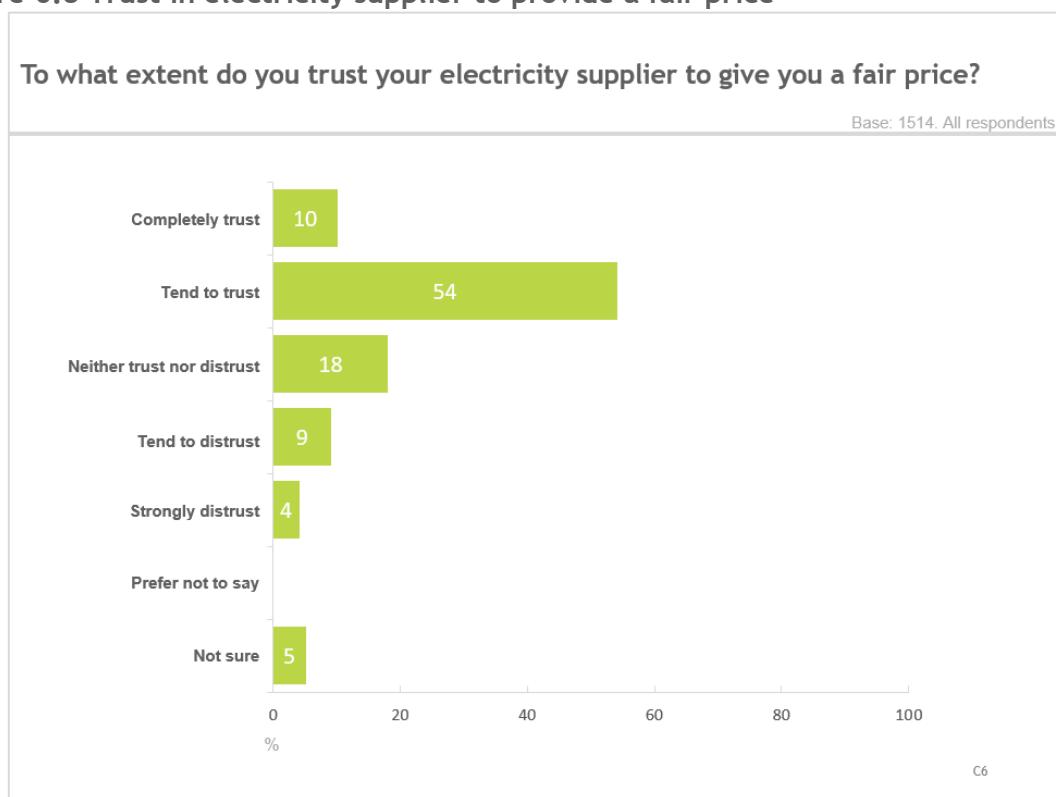
Subgroup analysis found the following significant differences (see Table 6.6). Respondents aged over 65 (79%) were more likely to trust their electricity supplier to treat them fairly, while those aged 35 to 44 and 45 to 64 (13%) were more likely to distrust their supplier in this regard. Those who had switched electricity supplier in the last three years (14%) were also more likely to not trust their supplier to treat them fairly compared to those that had not switched (9%).

**Table 6.6 Trust in electricity supplier to treat customers fairly by demographics and switching**

		Distrust	Neither	Trust	Prefer not to say	Not sure	Total
Overall	All Base: 1514	10%	17%	69%	0%	3%	100%
Age	Under 35 Base:254	8%	21%	67%	-	4%	100%
	35-44 Base:284	13%	18%	66%	0%	3%	100%
	45-64 Base:564	13%	18%	65%	0%	3%	100%
	65 plus Base: 373	6%	13%	79%	-	2%	100%
Electricity switching	Switchers Base: 469	14%	20%	62%	0%	4%	100%
	Non-switchers Base: 1045	9%	16%	72%	0%	3%	100%

Domestic consumers aged 65 and over (73%) were also more likely to trust their electricity supplier to offer a fair price than those aged between 45 and 64 and 35 and 44 (both 60%). 17% of switchers said that they distrust their supplier to offer a fair price compared to 11% of non-switchers.

**Figure 6.8 Trust in electricity supplier to provide a fair price**



**Table 6.7 Trust in electricity supplier to provide a fair price by demographics and switching**

		Distrust	Neither	Trust	Prefer not to say	Not sure	Total
Overall	All Base: 1514	13%	18%	64%	0%	5%	100%
Age	Under 35 Base:254	11%	20%	65%	-	4%	100%
	35-44 Base:284	14%	21%	60%	-	5%	100%
	45-64 Base:564	16%	19%	60%	0%	5%	100%
	65 plus Base: 373	8%	15%	73%	-	4%	100%
	Switchers Base: 469	17%	20%	57%	0%	5%	100%
Electricity switching	Non-switchers Base: 1045	11%	17%	67%	-	5%	100%

### Gas

Levels of trust in gas suppliers were similar to that for electricity suppliers. Almost two thirds (65%) of those with gas heating stated that they trust their supplier to treat them fairly in their dealings, compared to 12% who said they would distrust their supplier. Three in five (60%)

confirmed that they trust their supplier to provide a fair price, with 16% reporting that they would not trust their supplier to do this.

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

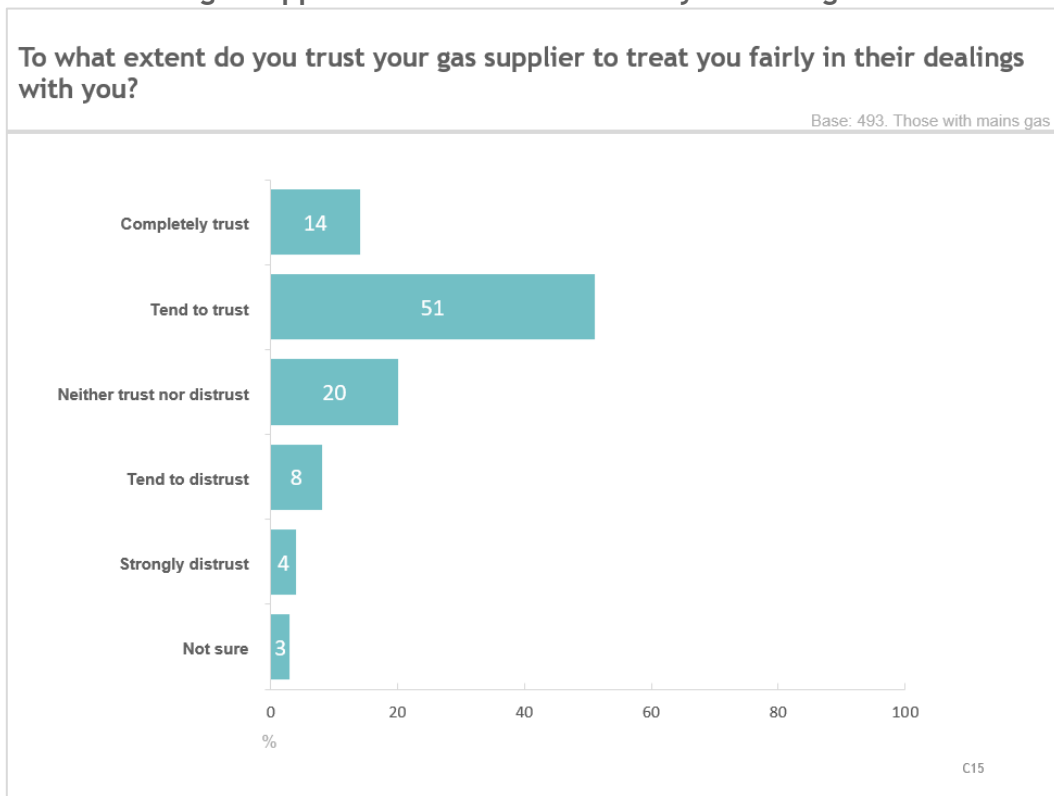
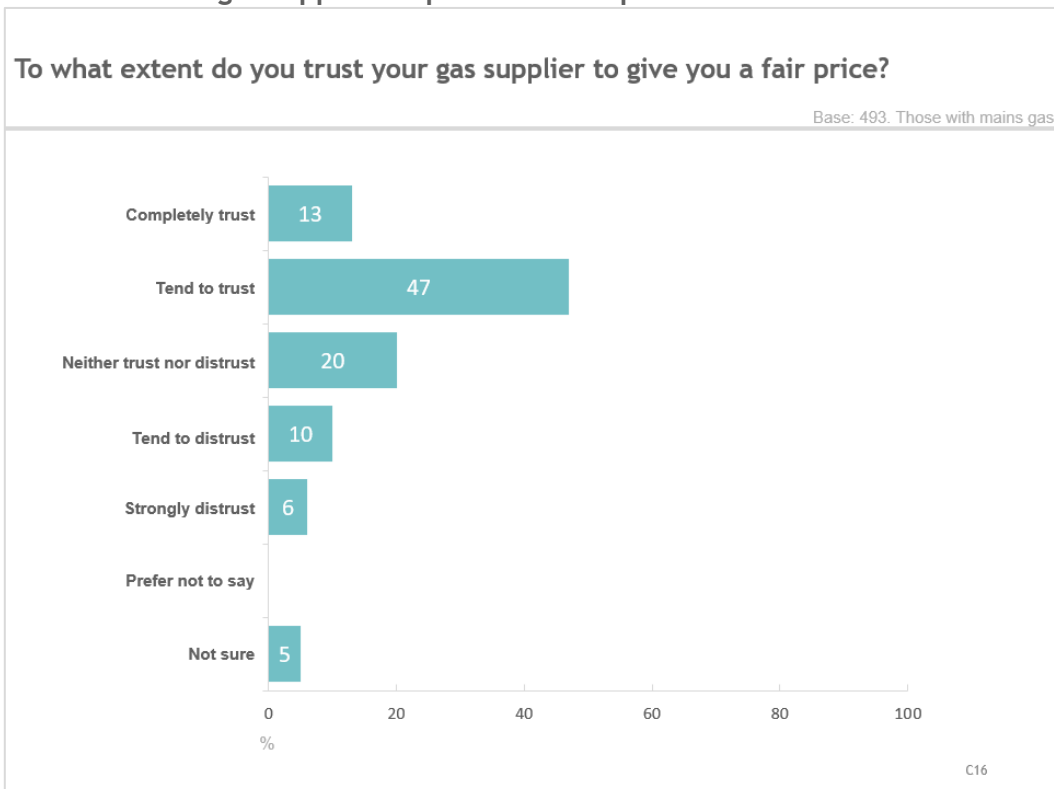


Figure 6.10 Trust in gas supplier to provide a fair price



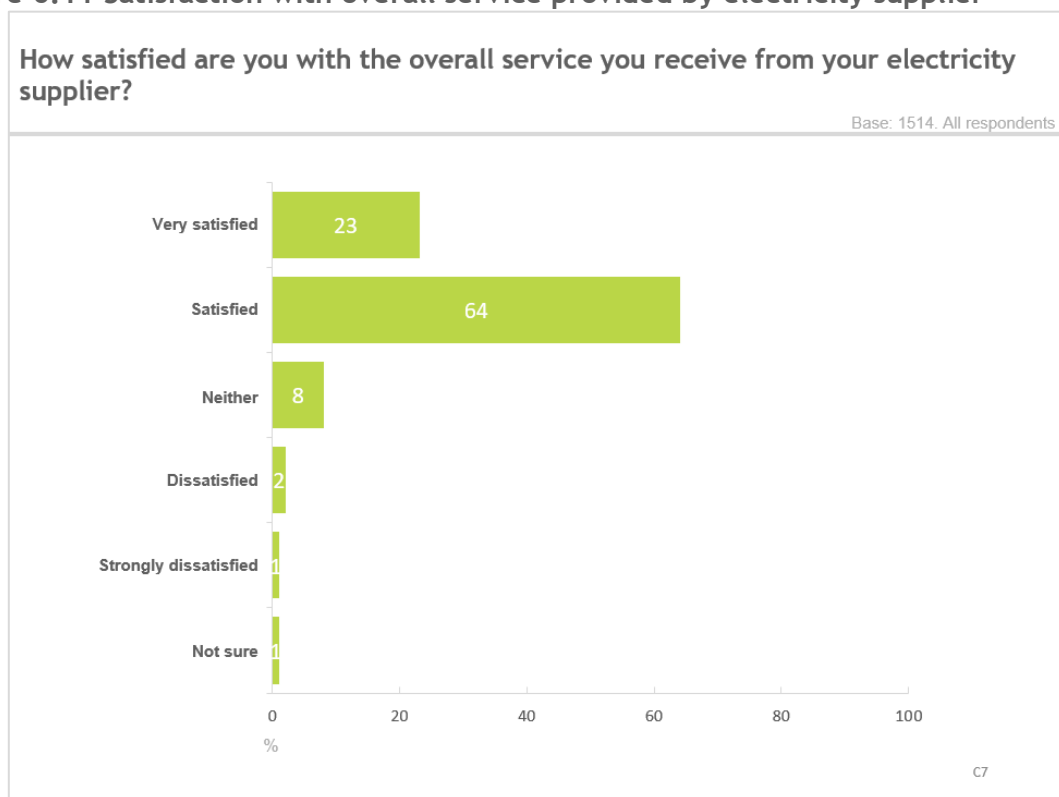
## Satisfaction with overall service provided by electricity and gas suppliers

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

### **Electricity**

The majority (87%) of domestic consumers were satisfied with the service they receive from their electricity supplier, with 3% reporting dissatisfaction. Despite satisfaction being high, there were some subgroups who were more likely than others to report dissatisfaction. 7% of 35- to 44-year-olds said that they were dissatisfied, compared to 3% of 45 to 64 year olds and 2% aged 65 and over. Respondents who had switched their electricity supplier in the last three years (5%) were more likely to express dissatisfaction with the service they receive than those who had not switched (3%) (see Table 6.8).

**Figure 6.11 Satisfaction with overall service provided by electricity supplier**



**Table 6.8 Satisfaction with overall service provided by electricity supplier by demographics and switching**

		Dissatisfied	Neither	Satisfied	Not sure	Total
Overall	All Base: 1514	4%	8%	87%	1%	100%
Age	Under 35 Base:254	4%	8%	87%	1%	100%
	35-44 Base:284	7%	8%	84%	1%	100%
	45-64 Base:564	3%	10%	86%	1%	100%
	65 plus Base: 373	2%	6%	92%	0%	100%
Electricity switching	Switchers Base: 469	5%	10%	83%	2%	100%
	Non-switchers Base: 1045	3%	7%	89%	0%	100%

**Gas**

Overall, gas consumers were also satisfied with the service they receive from their supplier, with 82% saying this, compared to 4% who were dissatisfied.

**Figure 6.12 Satisfaction with overall service provided by gas supplier**

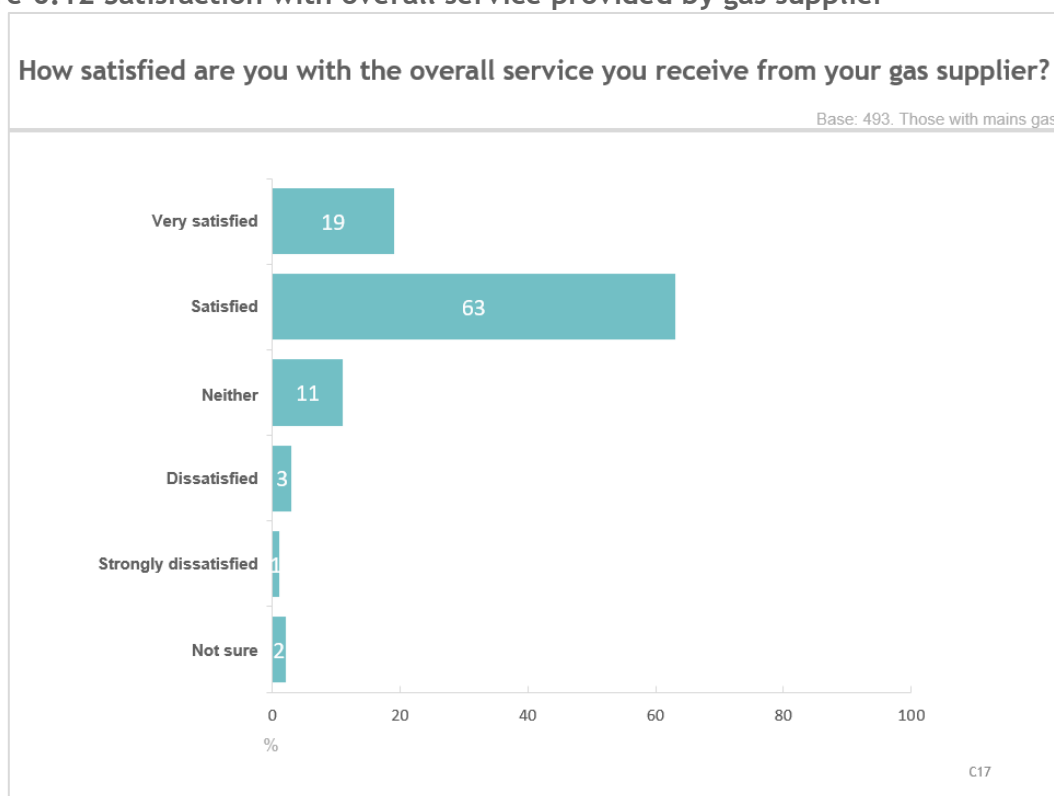


Table 6.9 highlights significant differences for a number of subgroups. Respondents who had a prepayment meter for gas (2%) were less likely to be dissatisfied with the service they receive than those with a credit meter (7%). Also those in deprivation quintile 2 were less likely to be satisfied than those located in other quintiles.

**Table 6.9 Satisfaction with overall service provided by gas supplier by deprivation and payment method**

		Dissatisfied	Neither	Satisfied	Not sure	Total
Overall	All Base: 493	4%	11%	83%	2%	100%
MDM Quintile	1 – Most deprived Base: 129	2%	15%	81%	2%	100%
	2 Base: 100	6%	15%	76%	3%	100%
	3 Base: 184	5%	11%	82%	1%	100%
	4 Base: 74	6%	10%	81%	2%	100%
	5 – Least deprived Base:	3%	6%	88%	2%	100%
Gas payment method	Prepayment meter Base: 279	2%	13%	82%	3%	100%
	Credit meter Base: 214	7%	8%	83%	-	100%

## 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, while a further 1% had tried to make contact but could not get through (see Figure 6.13).

Those in the ABC1 SEG (12%) were significantly more likely to have contacted their electricity supplier than those in the C2DE group (7%), while those who have access to the internet (10%) or who were confident in using the internet (11%) were more likely to have made contact than those who did not have internet access (3%) or who were not confident using the internet (5%). Domestic consumers who had switched their electricity supplier in the last three years (15%) were also more likely than those who had not switched (7%) to have contacted their supplier (see Table 6.10).

Figure 6.13 Contact with electricity supplier in the last 12 months

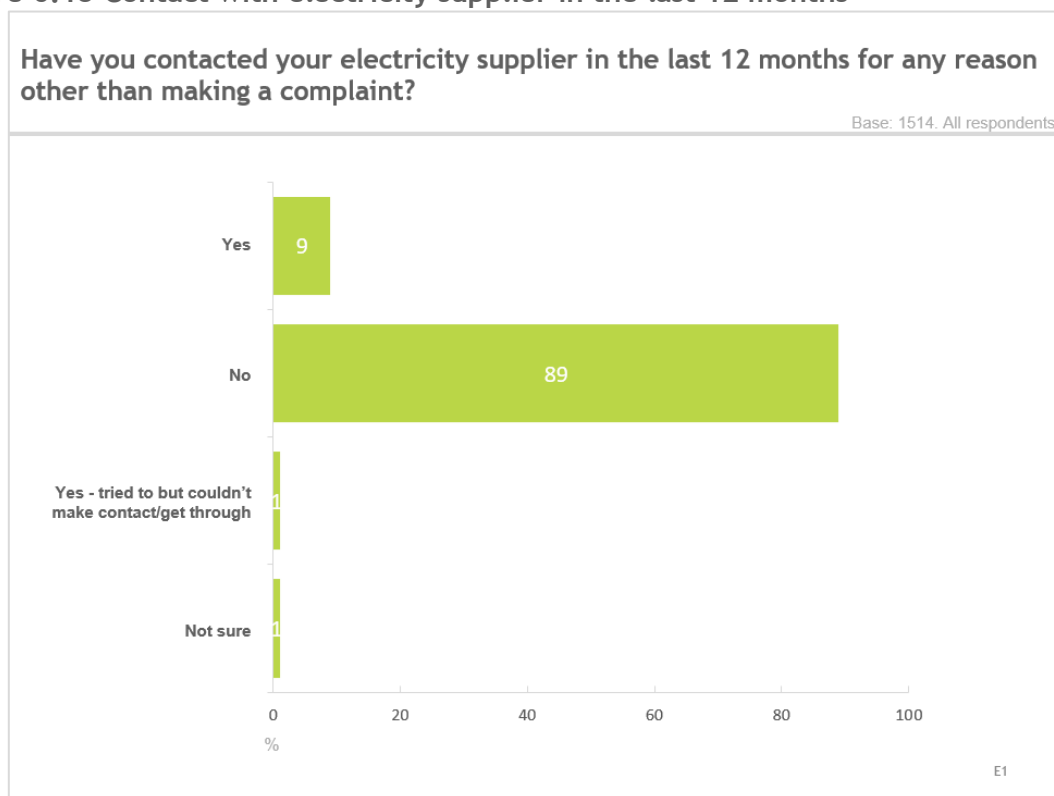


Table 6.10 Contact with electricity supplier in the last 12 months by demographics, digital inclusion and switching

		Yes	No	Couldn't get through	Not sure	Total
Overall	All Base: 1514	9%	89%	1%	1%	100%
Age	Under 35 Base:254	12%	87%	1%	-	100%
	35-44 Base:284	11%	89%	-	1%	100%
	45-64 Base:564	9%	90%	1%	1%	100%
	65 plus Base: 373	9%	90%	1%	1%	100%
	SEG	ABC1 Base: 725	12%	87%	0%	0%
	C2DE Base: 738	7%	92%	1%	0%	100%
Internet access	Yes Base: 1366	10%	89%	1%	0%	100%
	No Base: 148	3%	95%	-	2%	100%
Confidence using internet	Not confident Base: 330	5%	94%	1%	1%	100%
	Neither Base: 233	8%	90%	1%	1%	100%
	Confident Base: 951	11%	88%	0%	1%	100%
Electricity switching	Switchers Base: 469	15%	84%	1%	0%	100%
	Non-switchers Base: 1045	7%	92%	0%	1%	100%



One third (34%) of those who had made contact did so to switch their energy contract, with those defined as switchers more likely to have contacted their supplier for this purpose (49%, compared to 20% of non-switchers). 19% revealed that they made contact as they wanted to query a bill, including 30% of those in high or medium vulnerability groups (compared to 13% who were not vulnerable), and a further 15% said they had a payment issue that they wanted to report.

Figure 6.14 Reasons for contacting electricity supplier

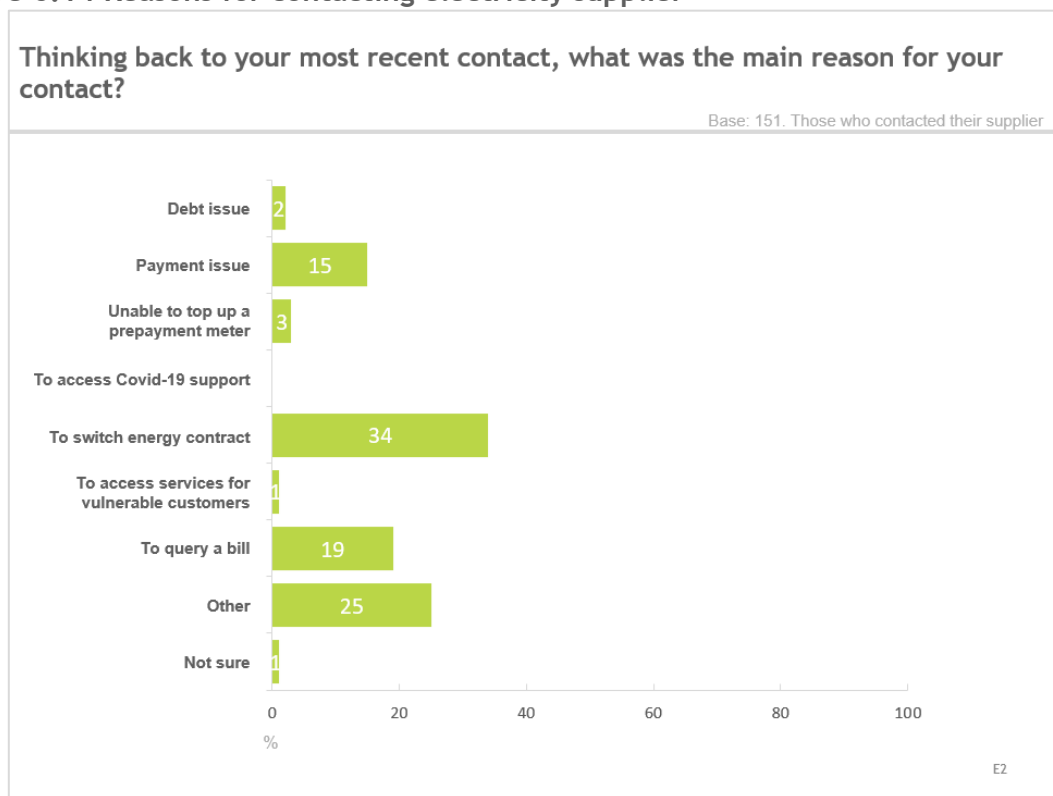


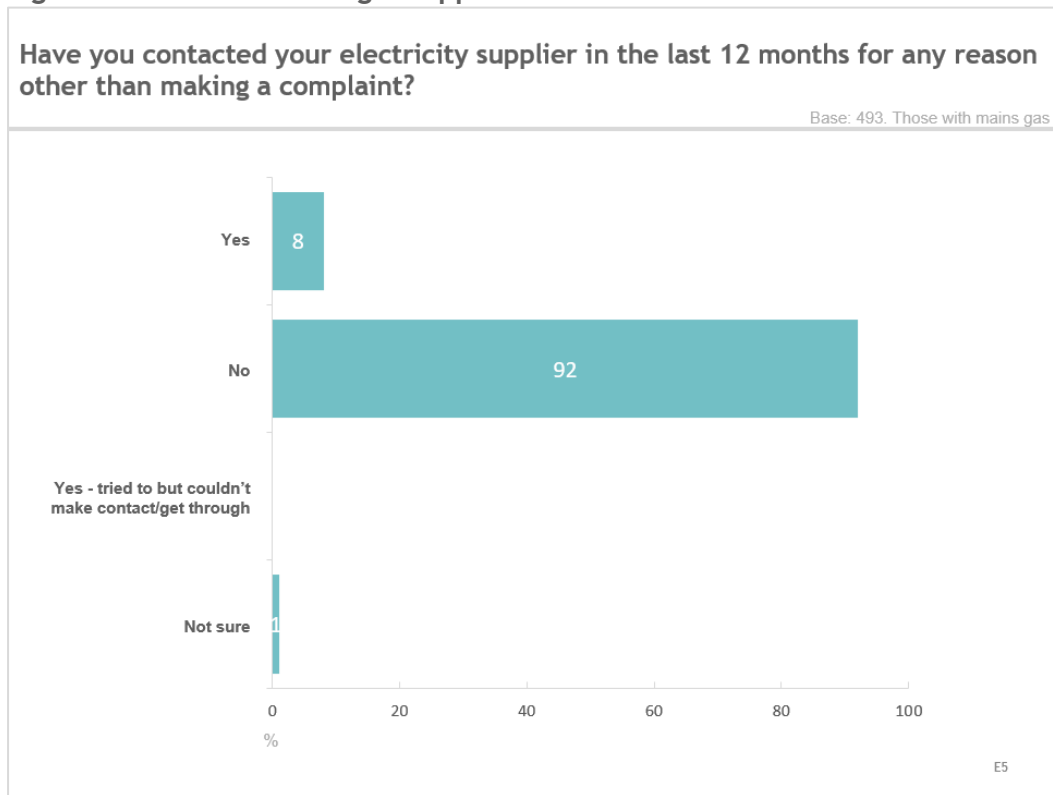
Table 6.11 Reasons for contacting electricity supplier by vulnerability and switching

	Overall Base: 151	Vulnerability			Electricity switchers	
		High/medium vulnerability Base: 61	Low vulnerability Base: 19	Not vulnerable Base: 71	Switchers Base: 75	Non- switchers Base: 76
Debt issue	2%	-	-	4%	1%	3%
Payment issue	15%	18%	21%	11%	13%	17%
Unable to top up a prepayment meter	3%	-	-	6%	3%	3%
To switch energy contract	34%	21%	37%	44%	49%	18%
To access services for vulnerable customers	1%	-	5%	-	1%	-
To query a bill	19%	30%	11%	13%	23%	16%
Other	25%	28%	26%	23%	9%	41%
Not sure/can't remember	1%	3%	-	-	-	3%
<i>Total</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>

## Gas

8% of respondents with gas heating contacted their supplier in the last 12 months. Of these, 18% said the reason was to report a payment issue, 16% wanted to query a bill, while 11% were unable to top up their prepayment meter.

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 (79%,  $n=120$ ) found it 'easy' or 'very easy', with 15% ( $n=22$ ) finding it 'difficult' or 'very difficult' (see Figure 6.16).

Those who were confident with using the internet (85%) were more likely to find contacting their supplier easy compared to those who were not confident (56%) (see Table 6.12).

Figure 6.16 Ease of contacting electricity supplier

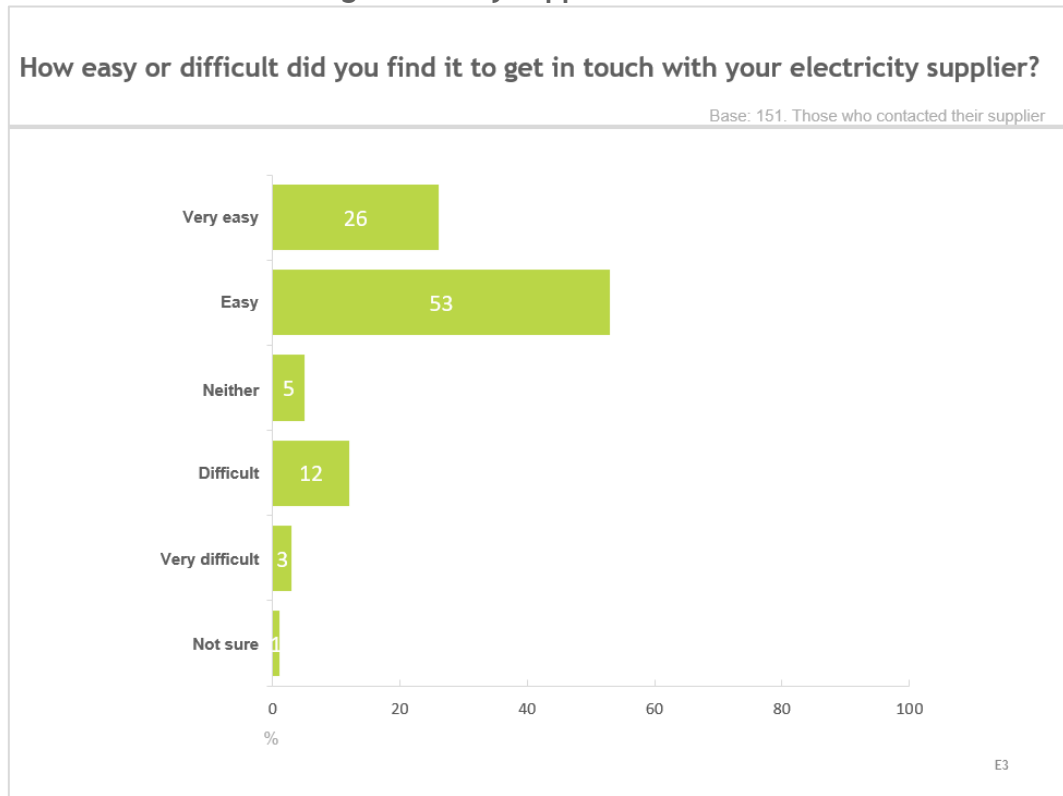


Table 6.12 Ease of contacting electricity supplier by internet confidence

		Difficult	Neither	Easy	Not sure	Total
Overall	All Base: 151	15%	5%	79%	1%	100%
Confidence using internet	Not confident Base: 18	28%	17%	56%	-	100%
	Neither Base: 21	24%	-	71%	5%	100%
	Confident Base: 112	11%	4%	85%	-	100%

**Gas**

Of the 38 respondents who contacted their gas supplier, 25 thought it was 'easy' or 'very easy' to make contact, while 11 respondents reported it was 'difficult' or 'very difficult'.

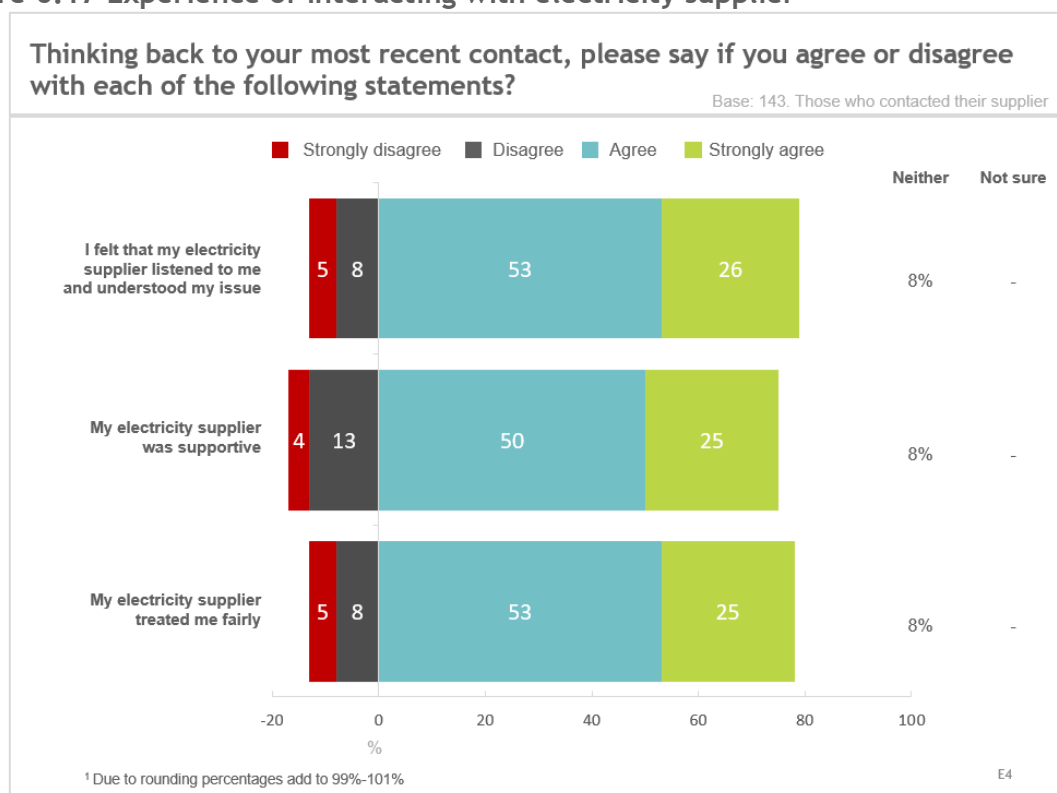
## Experience of interacting with supplier

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

### Electricity

Four in five (79%) respondents reported that their electricity supplier listened to and understood their issue when they made contact, however, 13% disagreed that this was the case. While three quarters (75%) thought their electricity supplier was supportive, 17% disagreed with this. 78% agreed that they were treated fairly and 12% disagreed.

Figure 6.17 Experience of interacting with electricity supplier



### Gas

29 of the 38 respondents who contacted their gas supplier reported they were listened to and understood when they made contact. 28 agreed that their supplier was supportive, and 30 respondents said they were treated fairly.

# 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;
- Time taken to resolve complaint;
- Satisfaction with the outcome; and
- Incidence of unreported complaint.

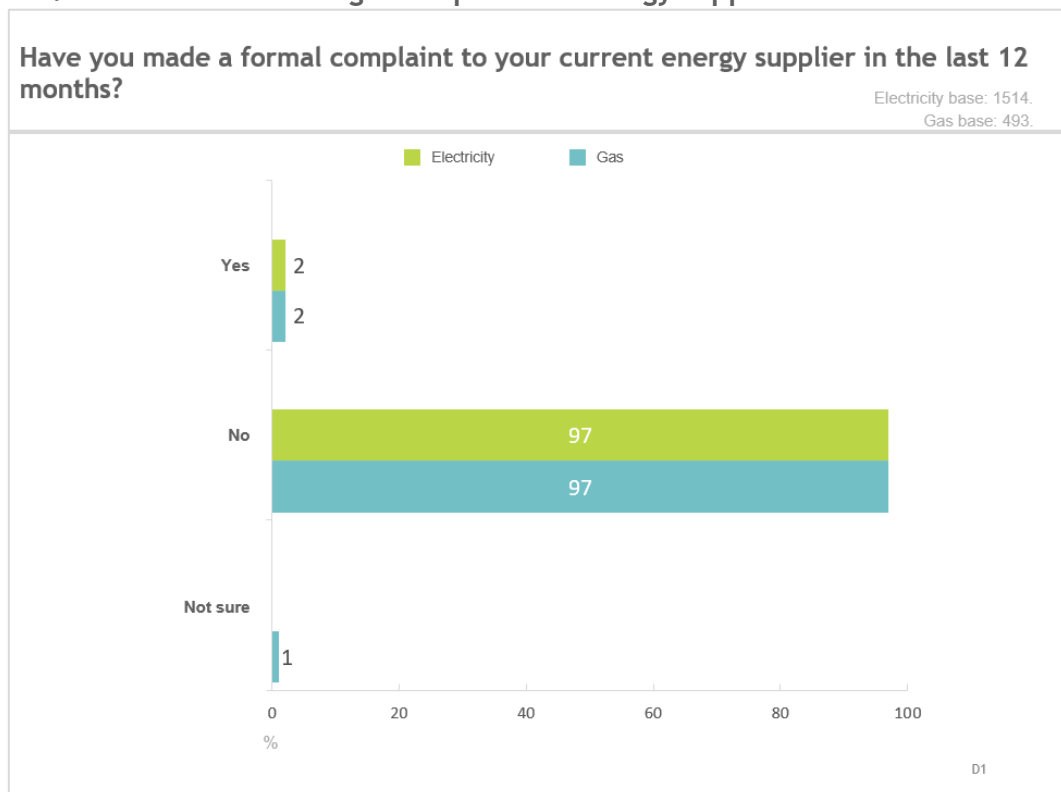
## Key findings

- 2% of both electricity and gas consumers 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 or gas supplier in the past but left it unreported.

## Incidence of making a complaint

2% of both electricity and gas customers reported that they had made a complaint to their electricity supplier in the last 12 months.

Figure 7.1 Incidence of making a complaint to energy supplier



As shown in table 7.1 vulnerable respondents were more likely to have made a complaint to their electricity supplier, with 4% reporting that they had complained in the last 12 months compared to 1% who were not vulnerable. However, no differences were observed in the incidence of complaints to gas suppliers (see Table 8.1).

**Table 7.1 Incidence of making a complaint to supplier by vulnerability**

		Yes	No	Not sure	Total
Overall	All Base: 1514	2%	97%	0%	100%
Vulnerability	High/medium vulnerability Base: 597	4%	96%	0%	100%
	Low vulnerability Base: 133	3%	97%	-	100%
	Not vulnerable Base: 784	1%	98%	0%	100%
Gas	All Base: 493	2%	97%	1%	100%
	High/medium vulnerability Base: 145	3%	97%	1%	100%
	Low vulnerability Base: 55	2%	98%	-	100%
	Not vulnerable Base: 293	2%	97%	1%	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 34 electricity customers who made a complaint to their supplier, 13 found it easy to make the complaint, while a further 16 respondents found it difficult.

### **Gas**

6 of the 11 gas customers who made a complaint to their supplier found the complaint process easy, compared to 3 respondents who found it difficult.

## Time taken to resolve complaint

Those who had complained to either their electricity or gas supplier were asked how long it took to resolve their most recent complaint.

### **Electricity**

11 respondents had their complaint to their electricity supplier resolved within the same day the complaint was made, and a further 5 respondents had the complaint resolved within two weeks. 12 respondents confirmed it took over a month to resolve their complaint, that their complaint was ongoing or that they didn't expect their complaint to be resolved.

### **Gas**

Of the 11 respondents who made a complaint to their gas supplier, 2 had been resolved within a day, 5 within two weeks, and 3 reported it took longer than a month to resolve or they did not expect it to be resolved.

## **Satisfaction with the outcome**

Consumers were then asked to describe their level of satisfaction with the complaint outcome.

### **Electricity**

21 respondents were satisfied with the outcome of the complaint to their electricity supplier, compared to 10 respondents who were dissatisfied.

### **Gas**

Of the 11 respondents who had complained to their mains gas supplier, 5 were either 'satisfied' or 'very satisfied', 3 were 'dissatisfied' and 2 were 'very dissatisfied'.

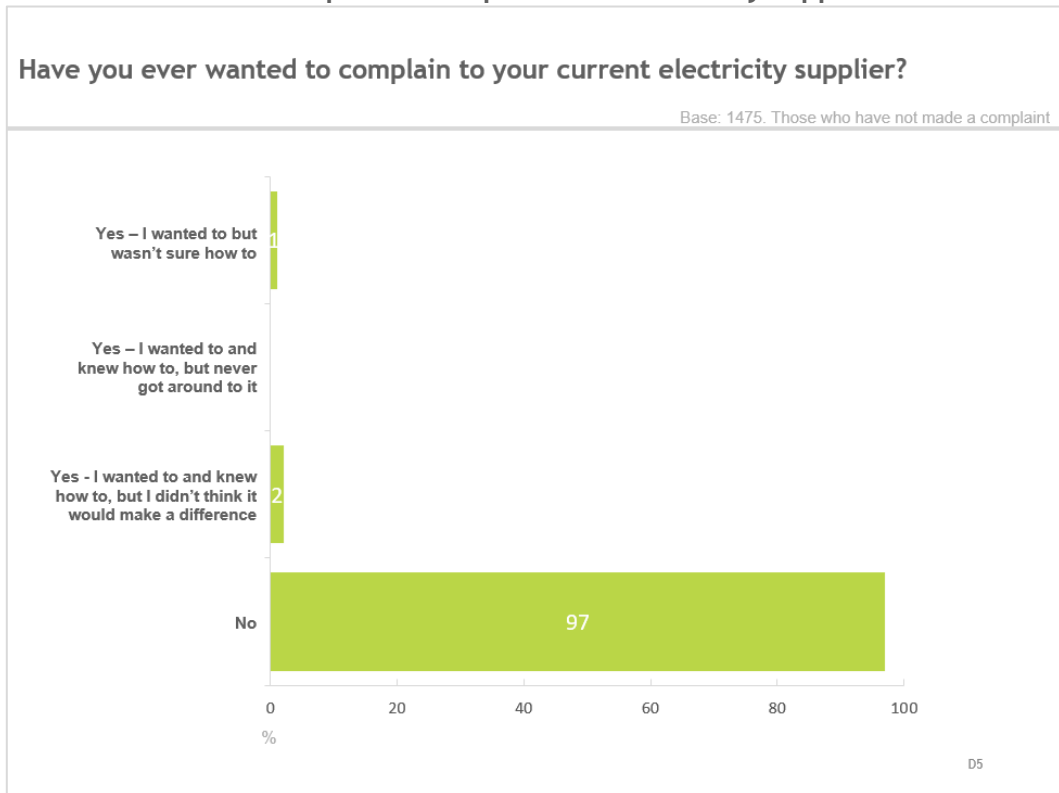
## **Incidence of unreported complaint**

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%) of respondents 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.

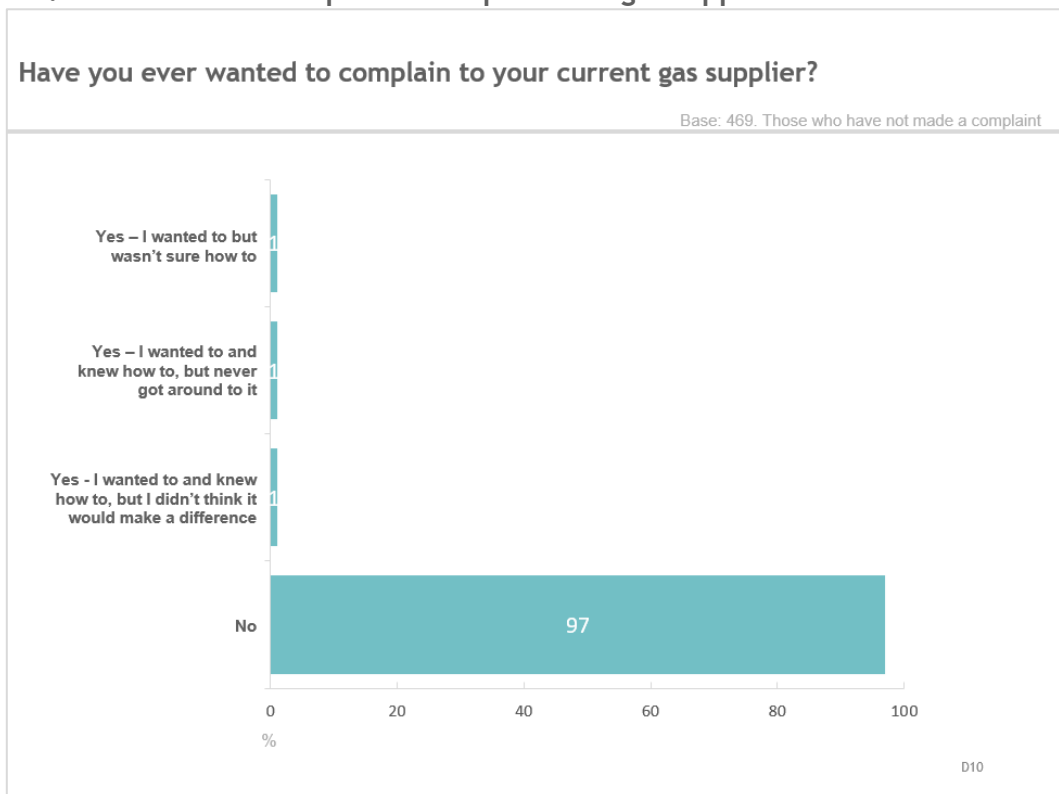
Figure 7.2 Incidence of unreported complaints to electricity supplier



**Gas**

Similarly, the vast majority (97%) of gas consumers confirmed that they have never wanted to make a complaint to their supplier. 3% have wanted to make a complaint but were either unsure how to, never got round to it, or did not think it would make a difference.

Figure 7.3 Incidence of unreported complaints to gas supplier





# 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 (94%) of being able to choose between different electricity suppliers amongst domestic consumers, with 71% of those consumers agreeing that having this choice gives access to better deals. Two fifths (40%) had compared electricity deals to see if they could switch supplier or tariff, while one third (33%) of those who have the option to switch between gas suppliers said that they had compared gas deals.
- 44% of electricity consumers and 35% of gas customers were confident that they are on the best energy deal for them.
- 46% of domestic consumers have switched their electricity supplier at least once, a decrease of 13 percentage points from 59% in the 2019 Tracker; of these, two thirds (67%) have done so within the last three years. In contrast, only 10% of those who have the option had switched gas suppliers.
- Reacting to a promotional offer from another supplier (33%) and feeling they were overpaying on their current deal (32%) were the main drivers for switching electricity supplier. While these drivers are also evident in the 2019 Tracker, the incidence of reacting to an offer from a doorstep seller has increased from 4% in 2019 to 31% in 2021.
- Almost half (49%) of electricity consumers who had switched did so through a doorstep seller.
- 82% of respondents agreed that they received the deal they were expecting when they switched electricity supplier, although 12% disagreed. 79% reported a positive and 2% a negative experience when they switched.
- Two thirds (66%) said that they had never switched electricity supplier because they were happy with their current service. Satisfaction with the current service (58%) was also the main reason cited for not switching gas supplier. This is consistent with the 2019 Tracker, in which 57% and 45% stated they were happy to remain with their current electricity and gas supplier respectively.
- 23% and 19% respectively said they were likely to switch their electricity and gas 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 (96%) of those with internet access were aware they could compare electricity deals, while 48% of those who are confident internet users said they had compared electricity deals compared to 23% who are not confident. Half (49%) of those who have internet access had switched electricity supplier at least once in contrast to 22% of those without internet access.

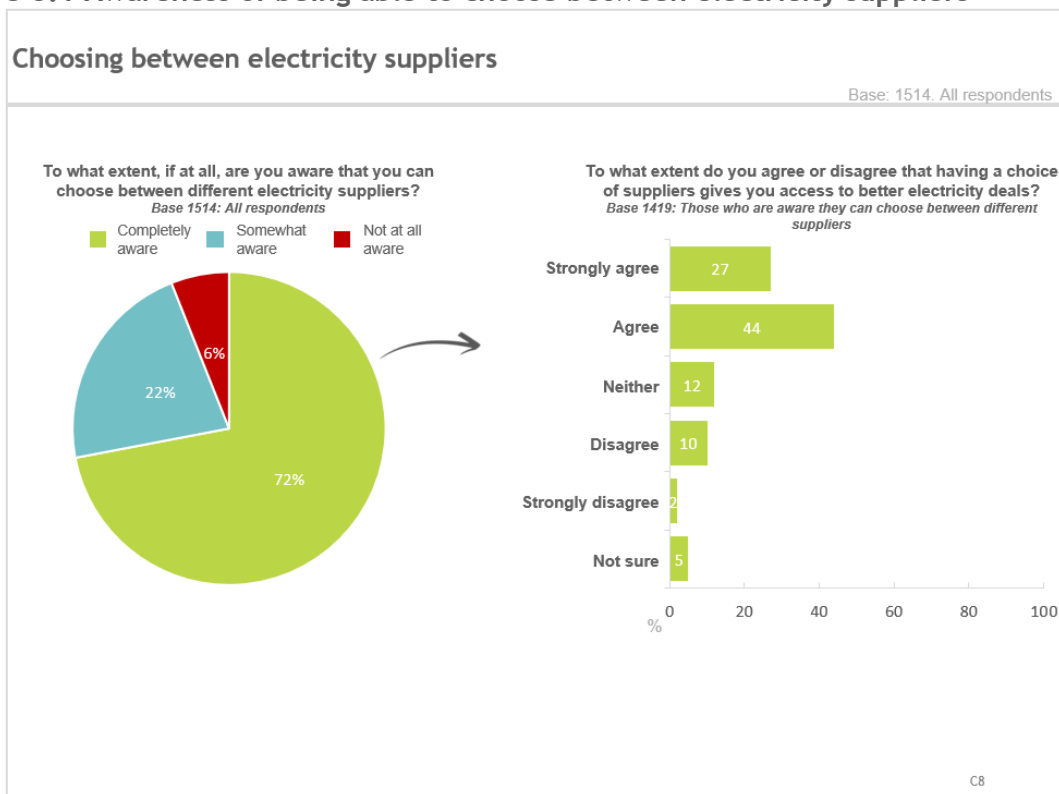
## Choosing between electricity suppliers

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.<sup>5</sup>

The majority (94%) of domestic consumers were aware that they can choose between different electricity suppliers, including nearly three quarters (72%) who were completely aware of this.

Almost all (96%) who have access to the internet stated that they were aware that they can compare deals, compared to 76% of those without access. Similarly, 96% of those who were confident as an internet user were aware, compared to 88% who were not confident.

Figure 8.1 Awareness of being able to choose between electricity suppliers



<sup>5</sup> These questions were not asked of gas consumers as they only have the choice between one or two suppliers depending on their location.

**Table 8.1 Awareness of being able to choose between electricity suppliers by internet access**

		Completely aware	Somewhat aware	Not at all aware	Total
Overall	All Base: 1514	72%	22%	6%	100%
Internet access	Yes Base: 1366	76%	20%	4%	100%
	No Base: 148	39%	37%	24%	100%
Confidence using internet	Not confident Base: 330	54%	34%	12%	100%
	Neither Base: 233	70%	21%	9%	100%
	Confident Base: 951	79%	18%	4%	100%

71% of those who were aware that they can choose between suppliers agreed having a choice gives them access to better deals, compared to 12% who did not agree.

Customers with a credit meter (14%) were more likely to disagree that a choice of suppliers gives them access to better deals than those who have a prepayment meter (8%). The following significant differences were also identified:

- 80% of 18 to 34 years olds agreed that having a choice of electricity supplier allows them access to a better deal, compared to 64% of those aged 65 plus;
- Urban respondents (73%) were more likely to agree than rural respondents (68%);
- Those who were confident as an internet user (74%) were more likely to agree than those who were not confident (68%).

**Table 8.2 Level of agreement that being able to choose between electricity suppliers gives access to better deals by demographics, location, internet confidence and payment method**

		Disagree	Neither	Agree	Not sure	Total
Overall	All Base: 1419	12%	12%	71%	5%	100%
Age	Under 35 Base: 236	7%	11%	80%	2%	100%
	35-44 Base: 270	10%	14%	73%	3%	100%
	45-64 Base: 543	13%	13%	69%	5%	100%
	65 plus Base: 335	15%	13%	64%	8%	100%
Location	Urban Base: 867	10%	12%	73%	4%	100%
	Rural Base: 552	14%	12%	68%	6%	100%
Confidence using internet	Not confident Base: 292	12%	14%	68%	5%	100%
	Neither Base: 211	19%	15%	62%	4%	100%
	Confident Base: 916	10%	11%	74%	5%	100%
Electricity payment method	Prepayment meter Base: 558	8%	13%	74%	5%	100%
	Credit meter Base: 861	14%	12%	69%	5%	100%

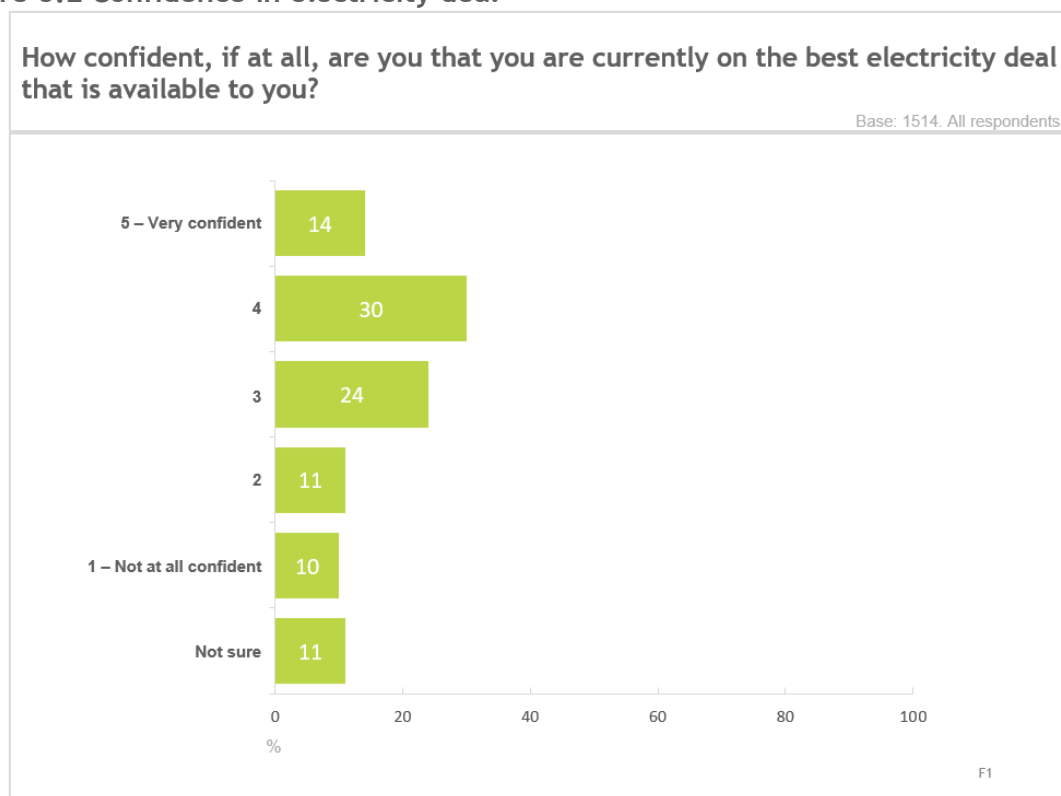
## Confidence in current energy deal

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

44% of domestic consumers provided a rating of '4' or '5', including 14% who said they were 'very confident' that they were on the best electricity deal. One quarter (24%) gave a rating of '3', while one in five (21%) were not confident in their current electricity deal (rating '1' or '2') (see Figure 9.2). Those who had switched their energy supplier (52%, compared to 41% who have never switched) were more likely to be confident (rating 4 or 5) with the deal they were currently on.

Figure 8.2 Confidence in electricity deal



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

- Domestic consumers aged 65 plus (55%) were most likely to be confident that they were on the best electricity deal compared to all other age groups (41% of 18- to 34-year-olds, 36% of 35- to 44-year-olds, and 42% of 45- to 64-year olds);
- One quarter (24%) of those in the ABC1 group were not confident with their current deal, compared to 19% in the C2DE group;
- Those living in the most deprived areas (48%) were more likely to be confident than those in the least deprived areas (40%);
- Private renters (32%) were less likely to say they were confident compared to respondents who own their home (45%) or live in social housing (51%);
- Respondents who have access to the internet (22%) and who were more confident using the internet (24%) were more likely to think they were on the best deal than those without

access (9%) and who were not confident (12%), suggesting that having access to the internet and being confident in using the internet allows domestic consumers more access to the different electricity deals available to them; and

- A higher proportion of high or medium vulnerable groups (51%) reported being confident with their deal compared to low vulnerable (34%) and non-vulnerable (41%) groups.

**Table 8.3 Confidence in electricity deal by demographics, deprivation, tenure, internet access, vulnerability and switching**

		Not confident (1,2)	Neither (3)	Confident (4,5)	Not sure	Total
Overall	All Base: 1514	21%	24%	44%	11%	100%
Age	Under 35 Base: 254	21%	25%	41%	14%	100%
	35-44 Base: 284	27%	29%	36%	8%	100%
	45-64 Base: 564	24%	25%	42%	9%	100%
	65 plus Base: 373	13%	19%	55%	13%	100%
SEG	ABC1 Base: 725	24%	25%	43%	8%	100%
	C2DE Base: 738	19%	22%	45%	14%	100%
MDM Quintile	1 – Most deprived Base: 283	19%	23%	48%	10%	100%
	2 Base: 272	21%	19%	49%	10%	100%
	3 Base: 321	18%	25%	45%	12%	100%
	4 Base: 335	22%	24%	39%	15%	100%
	5 – Least deprived Base: 303	26%	27%	40%	8%	100%
Tenure	Own home Base: 1167	22%	24%	45%	9%	100%
	Private renting Base: 149	21%	23%	32%	23%	100%
	Social housing Base: 175	19%	19%	51%	10%	100%
Internet access	Yes Base: 1366	22%	24%	43%	11%	100%
	No Base: 148	9%	24%	54%	13%	100%
Confidence using internet	Not confident Base: 330	12%	23%	50%	15%	100%
	Neither Base: 233	25%	30%	36%	9%	100%
	Confident Base: 951	24%	22%	44%	10%	100%
Vulnerability	High/medium vulnerability Base: 597	16%	23%	51%	11%	100%
	Low vulnerability Base: 133	25%	29%	34%	13%	100%
	Not vulnerable Base: 784	25%	24%	41%	11%	100%
Electricity switching	Switchers Base: 469	23%	19%	52%	6%	100%
	Non-switchers Base: 1045	21%	26%	41%	13%	100%

## Gas

Respondents with gas heating were slightly less likely to be confident that they were on the best deal compared to electricity consumers. One third (35%) said that they were confident with the deal they were on (rating '4' or '5'), while 26% gave a rating of '1' or '2' (see Figure 8.3).

Those who had switched gas supplier in the last three years (25%) were significantly more likely to say they were very confident with the gas deal they were on than those who had not switched (7%), while those with a prepayment meter (17%) were more likely to be unsure about their current deal than those with a credit meter (10%).

Figure 8.3 Confidence in gas deal

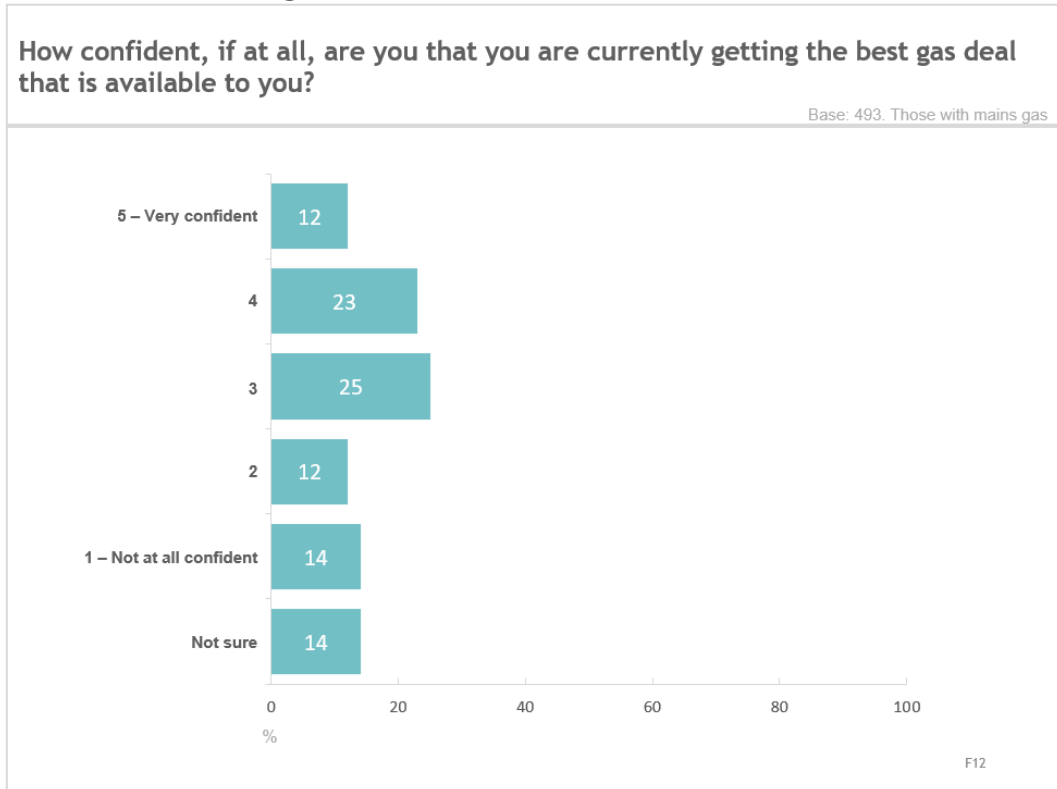


Table 8.4 Confidence in gas deal by payment method and switching behaviour

		Not confident (1,2)	Neither (3)	Confident (4,5)	Not sure	Total
Overall	All Base: 493	26%	25%	35%	14%	100%
Gas payment method	Prepayment meter Base: 279	24%	24%	35%	17%	100%
	Credit meter Base: 214	29%	26%	35%	10%	100%
Gas switching	Switchers Base: 28	7%	43%	50%	-	100%
	Non-switchers Base: 465	27%	24%	34%	15%	100%

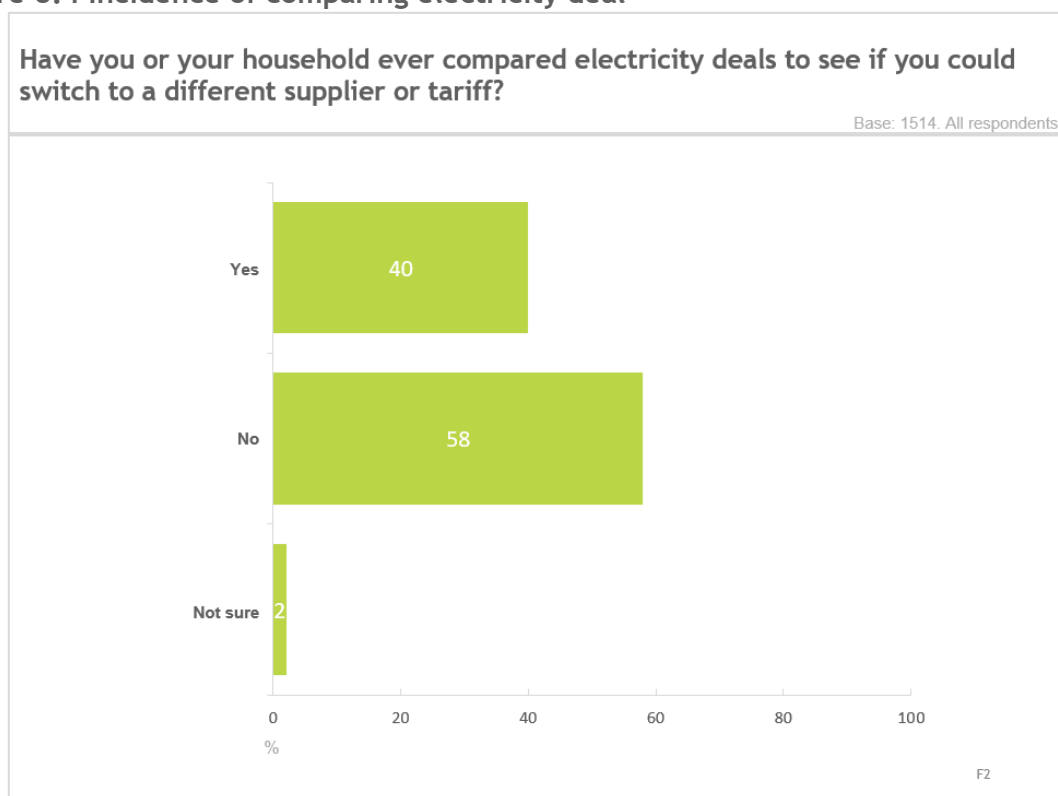
## Comparing energy deals

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**

Two in five (40%) domestic consumers had compared their electricity deal. Respondents who have a prepayment meter (45%) were more likely to have compared energy deals than those without (37%). Those who had switched energy supplier within the last three years (73%) were more likely to have compared electricity deals, compared to 25% of those who had not switched.

**Figure 8.4 Incidence of comparing electricity deal**



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

- Younger respondents aged 18 to 34 (37%) were more likely to have compared deals than older respondents aged 65 and over (28%);
- 47% of those in the ABC1 group had compared their deal, while one third (34%) of those in the C2DE group had done so;
- Half (50%) of domestic consumers living in the least deprived areas had compared deals, compared to 41% living in the most deprived areas;
- Respondents living in urban areas (46%) were more likely than those living in rural areas (30%) to have compared their electricity deal;
- 43% of those with access to the internet and 48% who were confident internet users said they had compared deals, compared to 16% who did not have internet access and 23% who were not confident users. This corresponds with the point that having access to the

internet also provides greater access to the variety of electricity deals available to domestic consumers

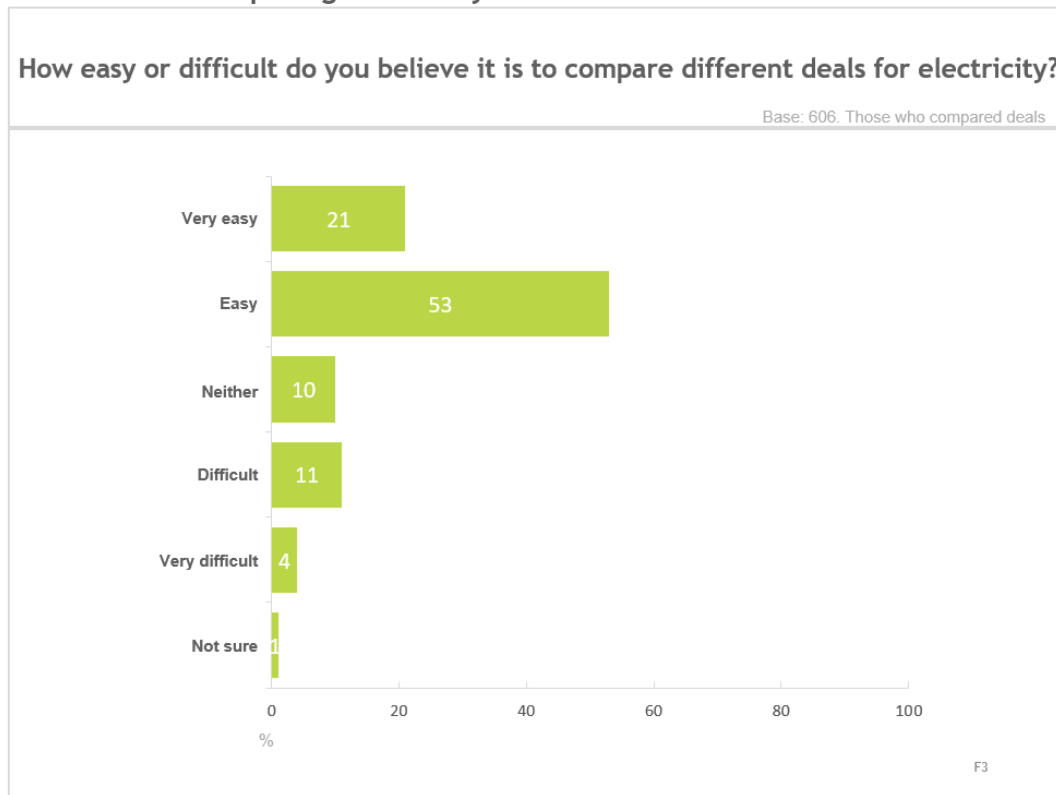
**Table 8.5 Incidence of comparing electricity deal by demographics, deprivation, location, internet access, payment method and switching**

		Yes	No	Not sure	Total
Overall	All Base: 1514	40%	58%	2%	100%
Age	Under 35 Base: 254	37%	60%	2%	100%
	35-44 Base: 284	45%	54%	1%	100%
	45-64 Base: 564	48%	52%	1%	100%
	65 plus Base: 373	28%	70%	2%	100%
	SEG	ABC1 Base: 725	47%	52%	1%
	C2DE Base: 738	34%	64%	2%	100%
MDM Quintile	1 – Most deprived Base: 283	41%	58%	1%	100%
	2 Base: 272	41%	57%	2%	100%
	3 Base: 321	34%	64%	2%	100%
	4 Base: 335	35%	64%	1%	100%
	5 – Least deprived Base: 303	50%	48%	2%	100%
Location	Urban Base: 912	46%	53%	1%	100%
	Rural Base: 602	30%	67%	3%	100%
Internet access	Yes Base: 1366	43%	56%	1%	100%
	No Base: 148	16%	79%	5%	100%
Confidence using internet	Not confident Base: 330	23%	74%	3%	100%
	Neither Base: 233	31%	67%	1%	100%
	Confident Base: 951	48%	51%	1%	100%
Electricity payment method	Prepayment meter Base: 589	45%	54%	2%	100%
	Credit meter Base: 925	37%	62%	1%	100%
Electricity switching	Switchers Base: 469	73%	26%	1%	100%
	Non-switchers Base: 1045	25%	73%	2%	100%



Three quarters (74%) of those who had compared their deal found this 'easy' or 'very easy' to do, compared to 15% who said this was 'difficult' or 'very difficult' for them. Respondents who were confident with using the internet (75%) were significantly more likely to find comparing electricity deals easy.

**Figure 8.5 Ease of comparing electricity deal**



**Table 8.6 Ease of comparing electricity deal by confidence of using the internet**

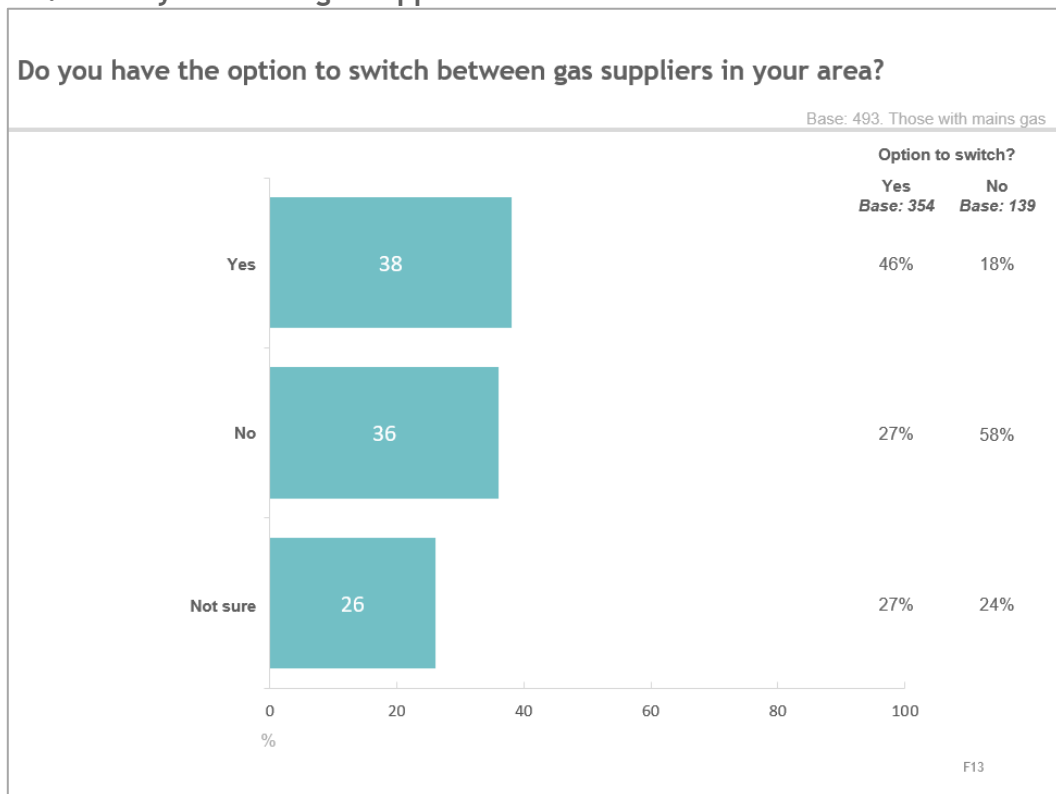
		Difficult	Neither	Easy	Not sure	Total
Overall	All Base: 606	15%	10%	73%	1%	100%
Confidence using internet	Not confident Base: 77	17%	17%	64%	3%	100%
	Neither Base: 73	16%	10%	73%	1%	100%
	Confident Base: 456	14%	9%	75%	1%	100%

## Gas

38% of respondents with gas heating stated that they had the option to switch between gas suppliers in their area, with 36% saying they do not have this option. It should also be noted that one quarter (26%) 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. 72% of respondents with gas were identified as living in an area which would allow them a choice of supplier. Over one quarter (27%) of those who did not think they had a choice of supplier actually did have a choice, while 18% of those who thought they could choose between gas suppliers are unable to.

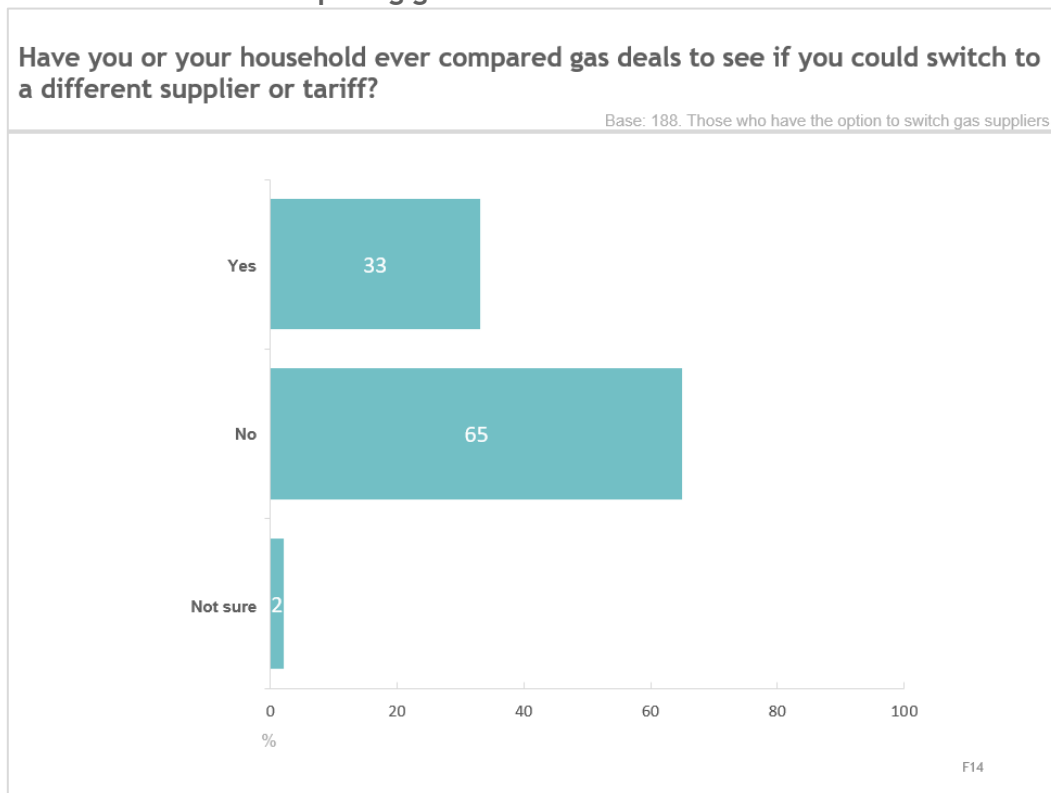
Figure 8.6 Ability to switch gas supplier



One third (33%) 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 (see Figure 9.7).

Those who have switched supplier in the last three years (42%) were also significantly more likely to have compared gas deals than those who have not switched their energy supplier (25%) (see Table 8.7).

**Figure 8.7 Incidence of comparing gas deal**

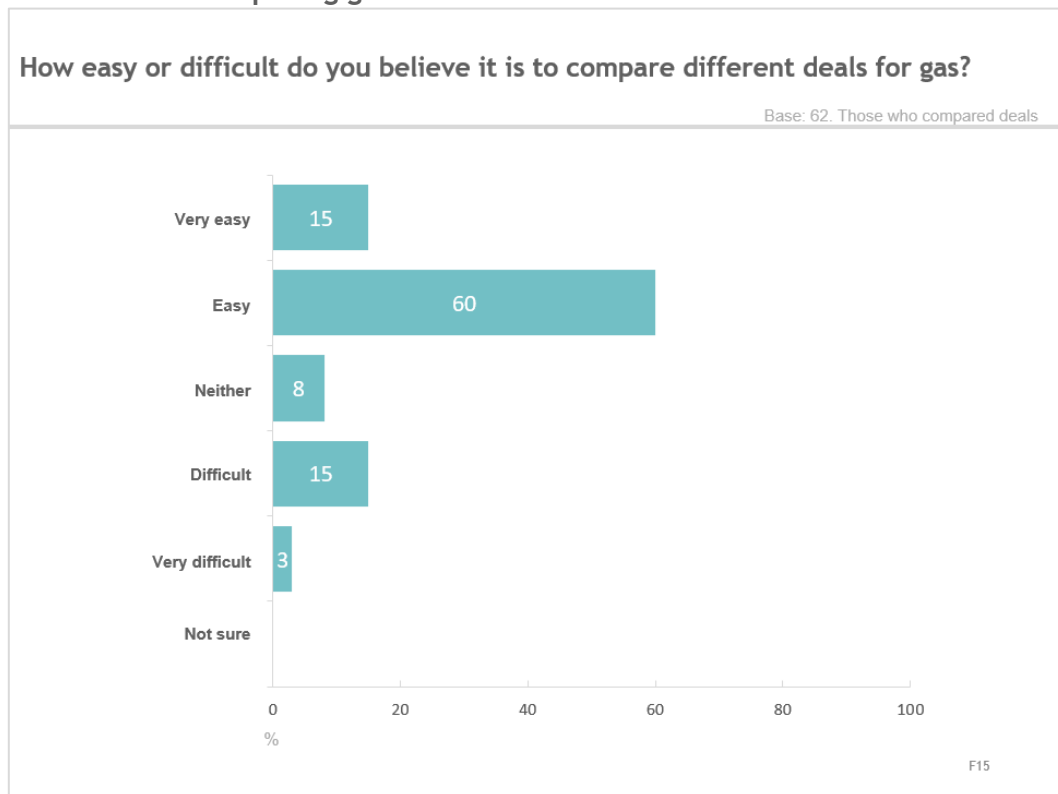


**Table 8.7 Incidence of comparing gas deal by switching**

		Yes	No	Not sure	Total
Overall	All Base: 188	33%	65%	2%	100%
Gas switching	Switchers Base: 26	81%	12%	8%	100%
	Non-switchers Base: 162	25%	74%	1%	100%

Of those who had compared their gas deal ( $N=62$ ), three quarters (75%,  $N=46$ ) said that this was easy to do, whereas 18% ( $N=11$ ) found it difficult.

Figure 8.8 Ease of comparing gas deal



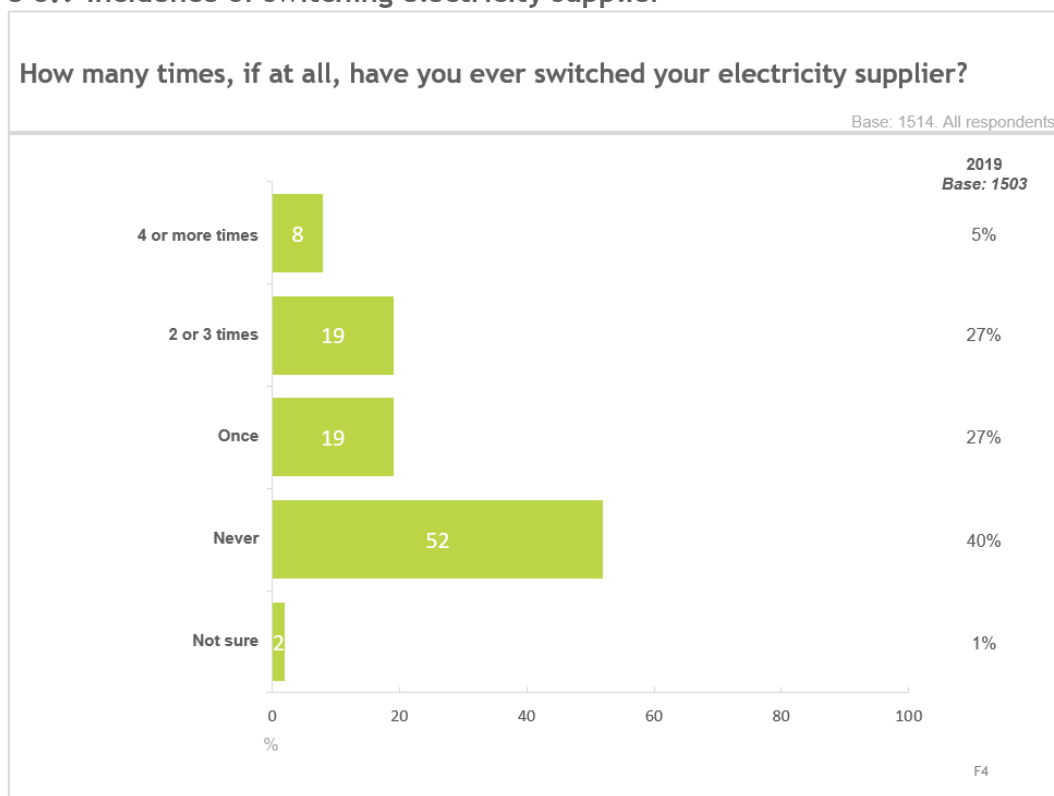
## Incidence of switching supplier

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

### *Electricity*

Over half (52%) of electricity customers reported that they have never switched their supplier. 19% said that they had switched once, and a further 19% had switched two or three times. 8% of respondents had switched at least four times (see Figure 8.9). Those who pay for their electricity using a prepayment meter (55%) were significantly the most likely to have switched at least once compared to those who pay using other methods (41%).

Figure 8.9 Incidence of switching electricity supplier



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

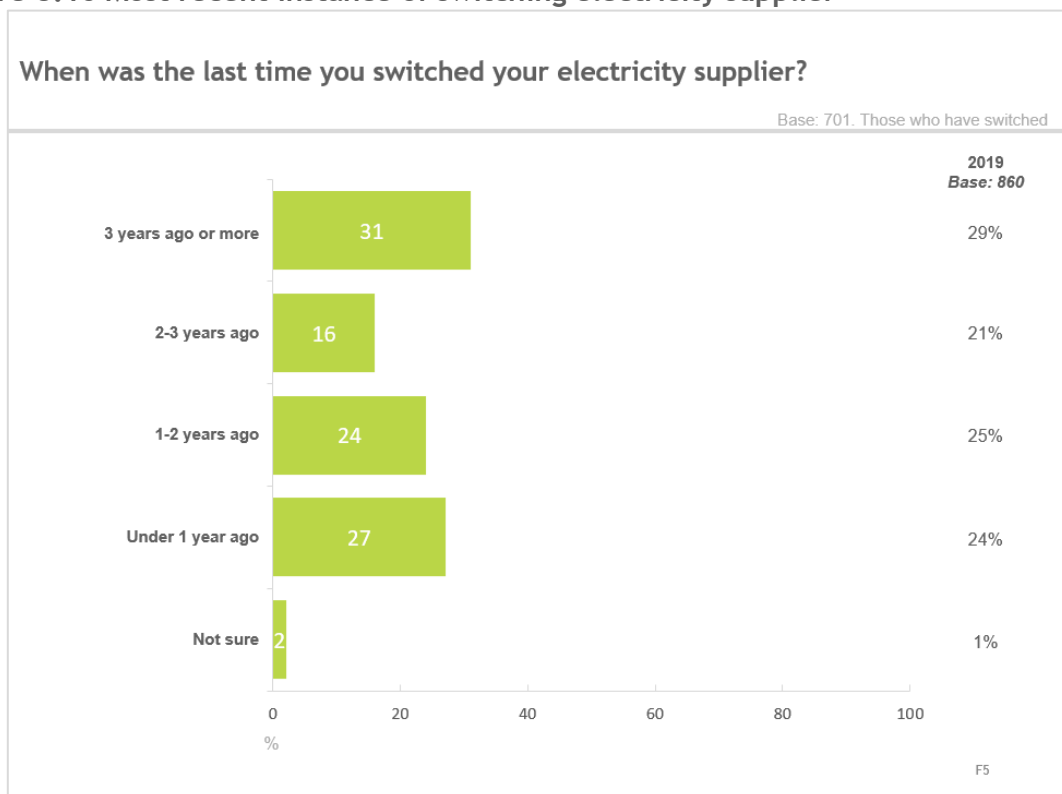
- Respondents aged between 35 and 44 (55%) and between 45 and 64 (56%) were more likely to say they had switched electricity supplier at least once, in comparison to 18- to 34-year-olds (38%) and 65 plus year olds (32%);
- 40% of respondents living in social housing had never switched, compared to 52% who owned their home and 63% who privately rent;
- Half (49%) of respondents who had internet access reported they had switched at least once, compared to 22% without access. Similarly, 50% of those who were confident internet users have switched, compared to 31% who were not confident users; and
- Those who were not in a vulnerable group (49%) were more likely to say they have switched electricity supplier than those in the high and medium vulnerability groups (42%).

**Table 8.8 Incidence of switching electricity supplier by demographics, tenure, internet access, vulnerability and payment method**

		Never	Once	2 or 3 times	4 or more times	Don't know	Total
Overall	All <i>Base: 1514</i>	52%	19%	19%	8%	2%	100%
Age	Under 35 <i>Base: 254</i>	60%	18%	15%	6%	2%	100%
	35-44 <i>Base: 284</i>	43%	17%	30%	9%	2%	100%
	45-64 <i>Base: 564</i>	43%	24%	22%	10%	1%	100%
	65 plus <i>Base: 373</i>	66%	14%	13%	5%	2%	100%
Tenure	Own home <i>Base: 1167</i>	52%	20%	19%	8%	1%	100%
	Private renting <i>Base: 149</i>	63%	10%	19%	6%	2%	100%
	Social housing <i>Base: 175</i>	40%	22%	26%	11%	1%	100%
Internet access	Yes <i>Base: 1366</i>	49%	20%	21%	8%	2%	100%
	No <i>Base: 148</i>	75%	12%	8%	2%	3%	100%
Confidence using internet	Not confident <i>Base: 330</i>	67%	15%	12%	4%	2%	100%
	Neither <i>Base: 233</i>	46%	24%	21%	6%	2%	100%
	Confident <i>Base: 951</i>	48%	19%	21%	10%	2%	100%
Vulnerability	High/medium vulnerability <i>Base: 597</i>	56%	17%	17%	8%	2%	100%
	Low vulnerability <i>Base: 133</i>	47%	14%	24%	11%	3%	100%
	Not vulnerable <i>Base: 784</i>	50%	21%	21%	7%	2%	100%
Electricity payment method	Prepayment meter <i>Base: 589</i>	43%	18%	25%	12%	2%	100%
	Credit meter <i>Base: 925</i>	58%	20%	16%	5%	1%	100%

Respondents who had switched electricity supplier were then asked when was the last time they switched. Two thirds (67%) had done so within the last three years, including 27% who had switched in the last year. A further 31% had switched at least three years ago.

**Figure 8.10 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):

- Four in five (81%) 18- to 34-year-olds and three quarters (73%) of 35 to 44 year olds were considered 'switchers', compared to 62% of 45 to 64 year olds and 58% of those aged 65 and over;
- Respondents living in social housing (78%) were more likely than those who own their home (64%) to have switched electricity supplier in the last three years; and
- 74% of urban respondents were considered electricity 'switchers', compared to 50% of those living in rural areas.

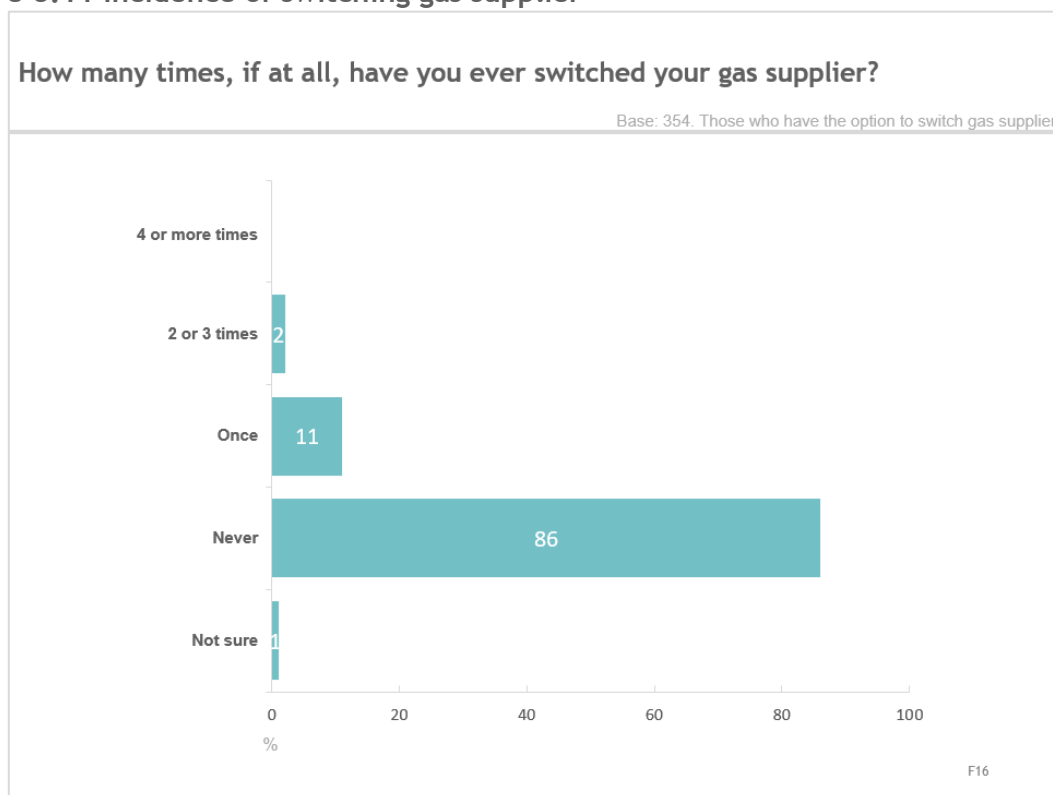
**Table 8.9 Most recent instance of switching electricity supplier by demographics, tenure and location**

		Under 1 year ago	1-2 years ago	2-3 years ago	3 years ago or more	Not sure	Total
Overall	All Base: 701	27%	24%	16%	31%	2%	100%
Age	Under 35 Base: 97	39%	25%	18%	12%	6%	100%
	35-44 Base: 158	31%	26%	16%	25%	2%	100%
	45-64 Base: 314	23%	24%	16%	37%	1%	100%
	65 plus Base: 120	23%	24%	12%	38%	3%	100%
Tenure	Own home Base: 541	26%	23%	16%	34%	2%	100%
	Private renting Base: 52	35%	17%	23%	17%	8%	100%
	Social housing Base: 103	33%	34%	11%	19%	3%	100%
Location	Urban Base: 493	32%	26%	15%	24%	2%	100%
	Rural Base: 208	15%	18%	17%	48%	2%	100%

### Gas

The majority (86%) of gas customers with the option to switch had never switched their supplier, while 13% have switched at least once.

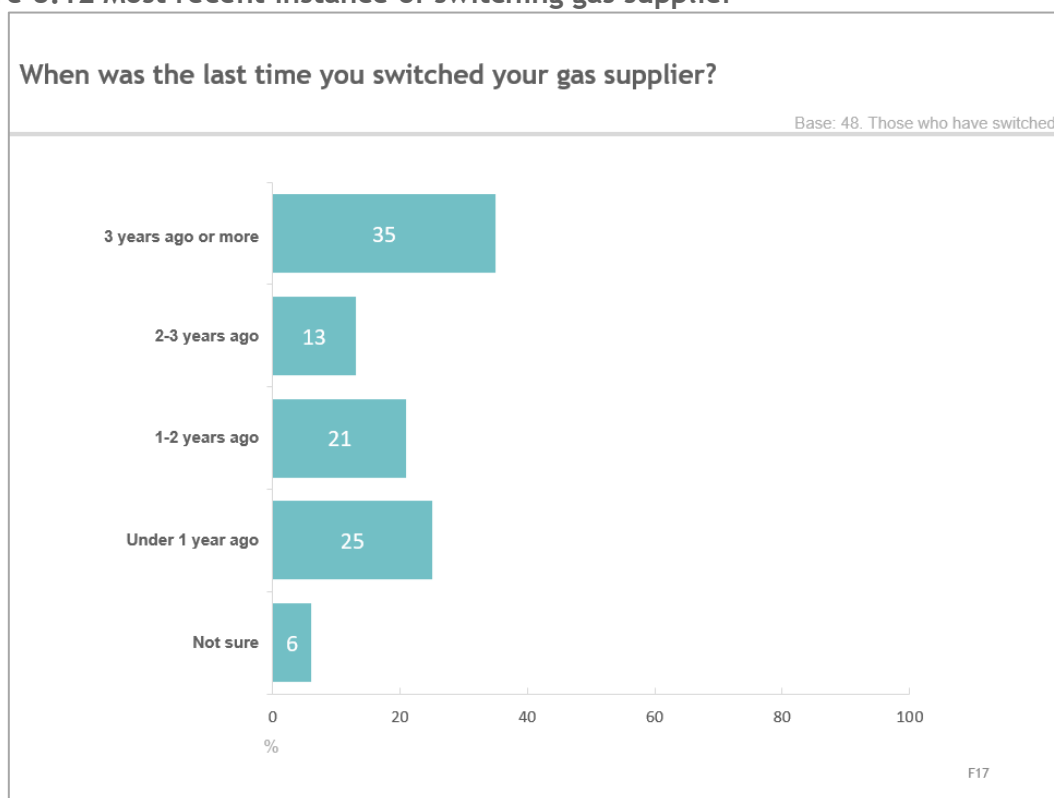
**Figure 8.11 Incidence of switching gas supplier**





Of the 48 respondents who had switched their gas supplier, 28 had switched within the last three years, while 17 had switched at least three years ago.

Figure 8.12 Most recent instance of switching gas supplier



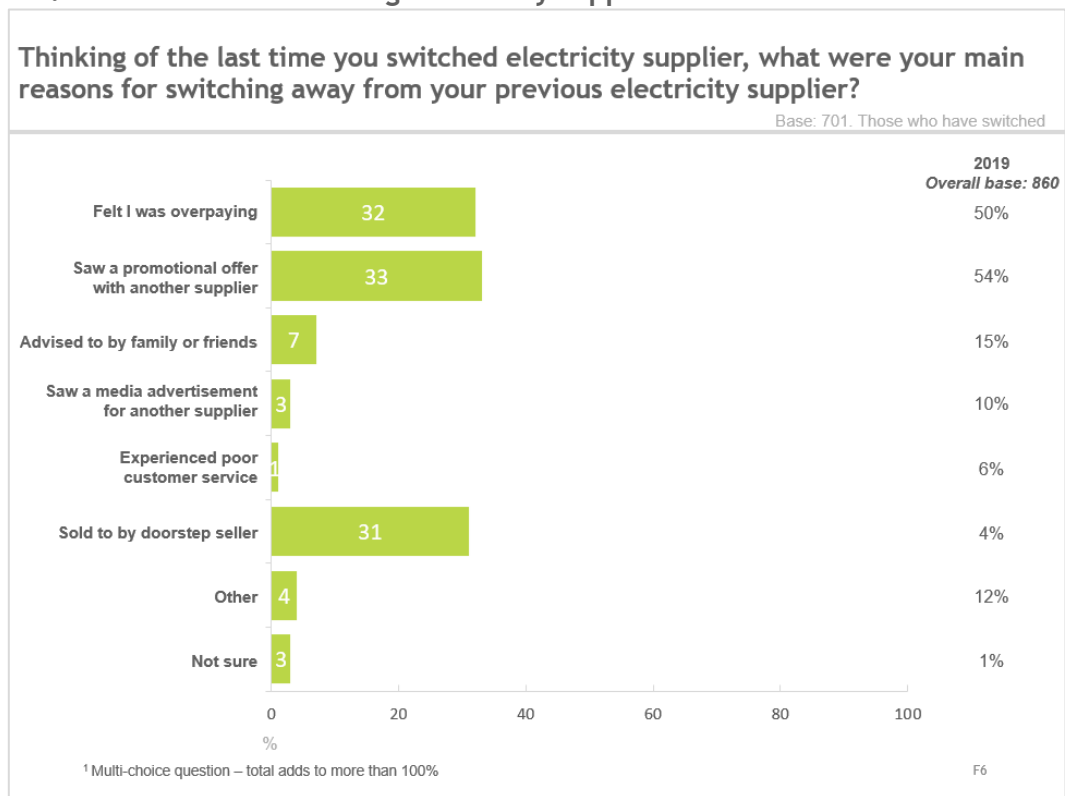
The number of domestic consumers who have never switched their electricity supplier has increased since 2019, when 40% said they had never switched their electricity supplier (52% in 2021) (see Figures 8.9). However, similar results were obtained with regards to the most recent instance of respondents switching supplier. Of those who had switched in the 2019 study, 70% of electricity consumers had done so in the previous three years (67% in 2021 respectively) (see Figures 8.10).

## Reasons for switching

### *Electricity*

There were three main drivers for switching electricity supplier: i) reacting to a promotional offer from another supplier; ii) reacting to feeling the respondent was paying too much; and iii) reacting to a deal offered by a doorstep seller (see Figure 8.13). One third (33%) of respondents who switched electricity supplier said it was because they saw a promotional offer, while 32% felt they were overpaying. 31% reported that they had been offered a deal by a doorstep seller.

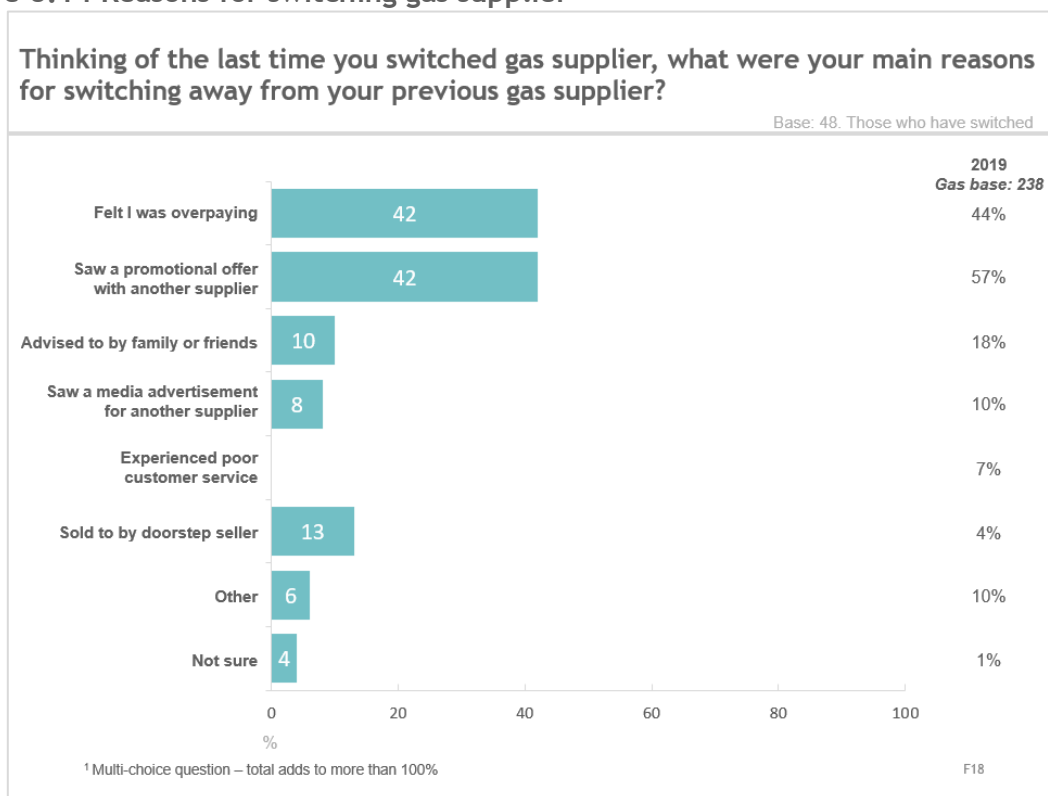
Figure 8.13 Reasons for switching electricity supplier



### Gas

Gas customers have similar drivers for switching: i) reacting to feeling they were overpaying; and ii) reacting to a promotional offer from another supplier (see Figure 8.14). 20 of the 48 respondents who had switched gas supplier said they felt they were overpaying on their previous deal, and a further 20 respondents said it was because they saw a promotional offer from another supplier. 6 respondents reported they had been sold their deal by a doorstep seller.

Figure 8.14 Reasons for switching gas supplier



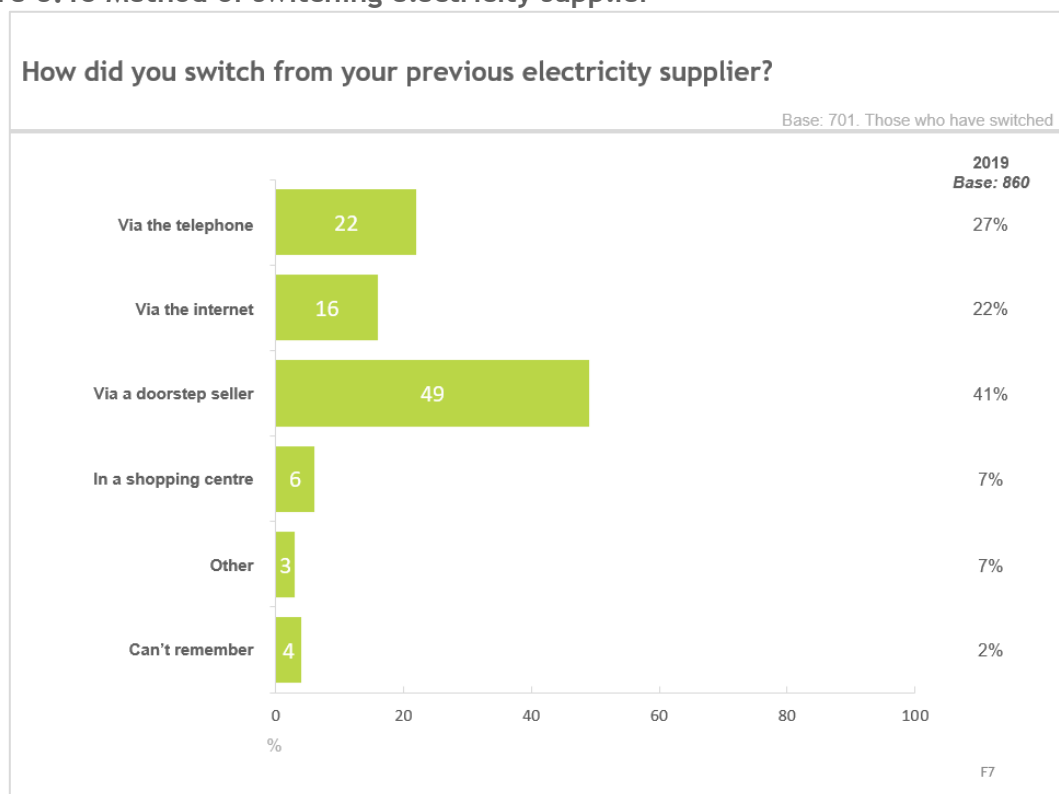
Although the drivers for switching energy supplier remain consistent, the commonality of the reasons has decreased since 2019. 54% said that they had seen a promotional offer (33% in 2021), and half (50%) felt they were overpaying (32% in 2021) (see Figure 8.15). Similarly, 57% of gas customers had seen a promotional offer (42% in 2021), but similar results were obtained for those who felt they were overpaying (44% compared to 42% in 2021) (see Figure 8.16). The percentage who were sold their deal by a doorstep seller has increased for both electricity (4% compared to 31% in 2021) and gas (4% compared to 13% in 2021) has increased.

## Experience of switching

### Electricity

The most common method used to switch electricity supplier was through a doorstep seller, with almost half (49%) saying this. Telephone (22%) was the next most common method, followed by using the internet (16%). Domestic consumers with a credit meter (22% monthly direct debit, 21% quarterly) were more likely to have used the internet to switch their supplier than those with a prepayment meter (11%).

Figure 8.15 Method of switching electricity supplier



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

- 18- to 34-year-olds (27%) were more likely to have switched via the internet than those aged 65 plus (8%);
- ABC1 respondents (22%) were also more likely to have used the internet compared to C2DE respondents (10%);
- Those living in urban areas (54%) were more likely to have switched supplier through a doorstep seller than those living in rural areas (38%);
- 79% of respondents who were not confident internet users had switched through a doorstep seller, compared to 44% who were confident;
- Doorstep sellers were more common for high or medium vulnerable consumers (55%) than for consumers who were not vulnerable (46%).

**Table 8.10 Method of switching electricity supplier by demographics, location, internet confidence and vulnerability**

		Telephone	Internet	Doorstep seller	Shopping centre	Other	Can't remember	Total
Overall	All Base: 701	22%	16%	49%	6%	3%	4%	100%
Age	Under 35 Base: 97	18%	27%	44%	7%	4%	-	100%
	35-44 Base: 158	26%	19%	44%	5%	3%	4%	100%
	45-64 Base: 314	22%	16%	50%	6%	3%	5%	100%
	65 plus Base: 120	20%	8%	58%	7%	3%	5%	100%
SEG	ABC1 Base: 361	22%	22%	41%	7%	3%	5%	100%
	C2DE Base: 326	21%	10%	57%	5%	3%	4%	100%
Confidence using internet	Not confident Base: 103	9%	2%	79%	4%	2%	5%	100%
	Neither Base: 120	26%	13%	44%	9%	3%	5%	100%
	Confident Base: 478	23%	21%	44%	6%	3%	4%	100%
Vulnerability	High/medium vulnerability Base: 254	20%	9%	55%	7%	4%	5%	100%
	Low vulnerability Base: 66	17%	26%	45%	9%	2%	2%	100%
	Not vulnerable Base: 381	24%	19%	46%	4%	3%	4%	100%

Four in five (79%) respondents agreed that they received the deal they expected when they switched electricity supplier, compared to 7% who disagreed (see Figure 8.16).

79% had a positive experience (rating '4' or '5') when they switched supplier, with 4% reporting a negative experience (rating '1' or '2') (see Figure 8.17).

Several respondents who had a negative experience said that this was because the price increased after they had switched, while others experienced poor customer service. Although there were no differences in experience between the methods of switching used, respondents who had access to the internet (80%) and who were confident internet users (80%) were significantly more likely to have had a positive experience than those without access (64%) and who were not confident users (70%) (see Table 9.11).

Figure 8.16 Expected deal when switching electricity supplier

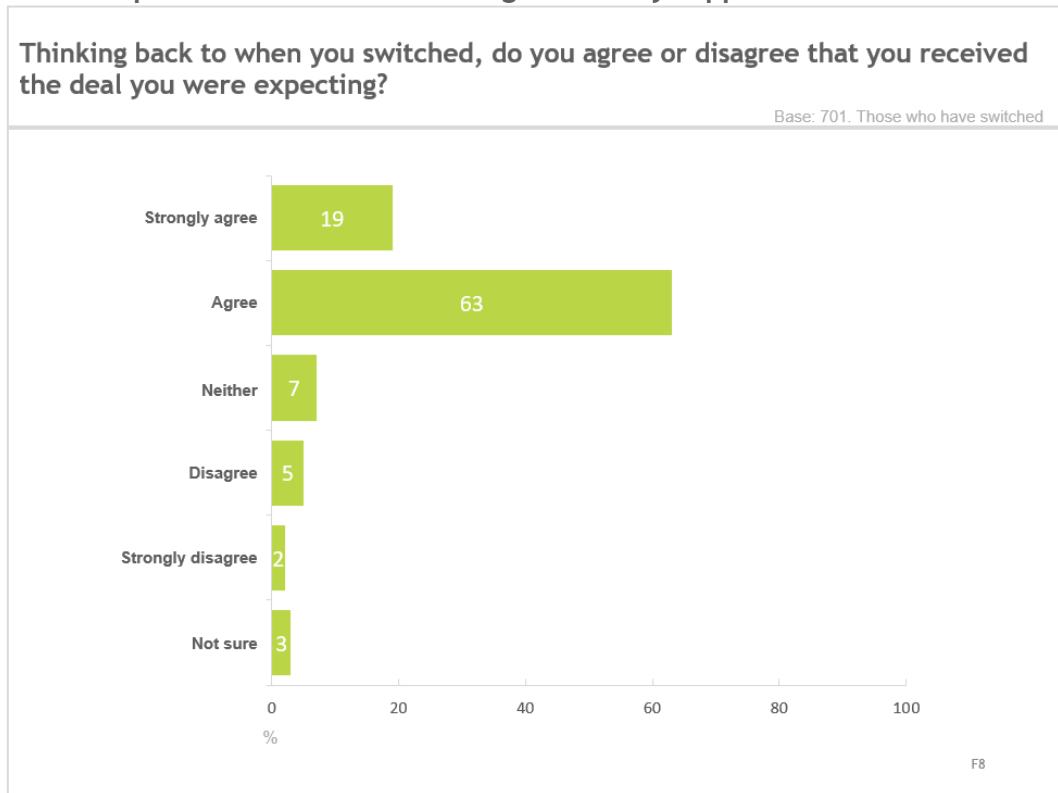
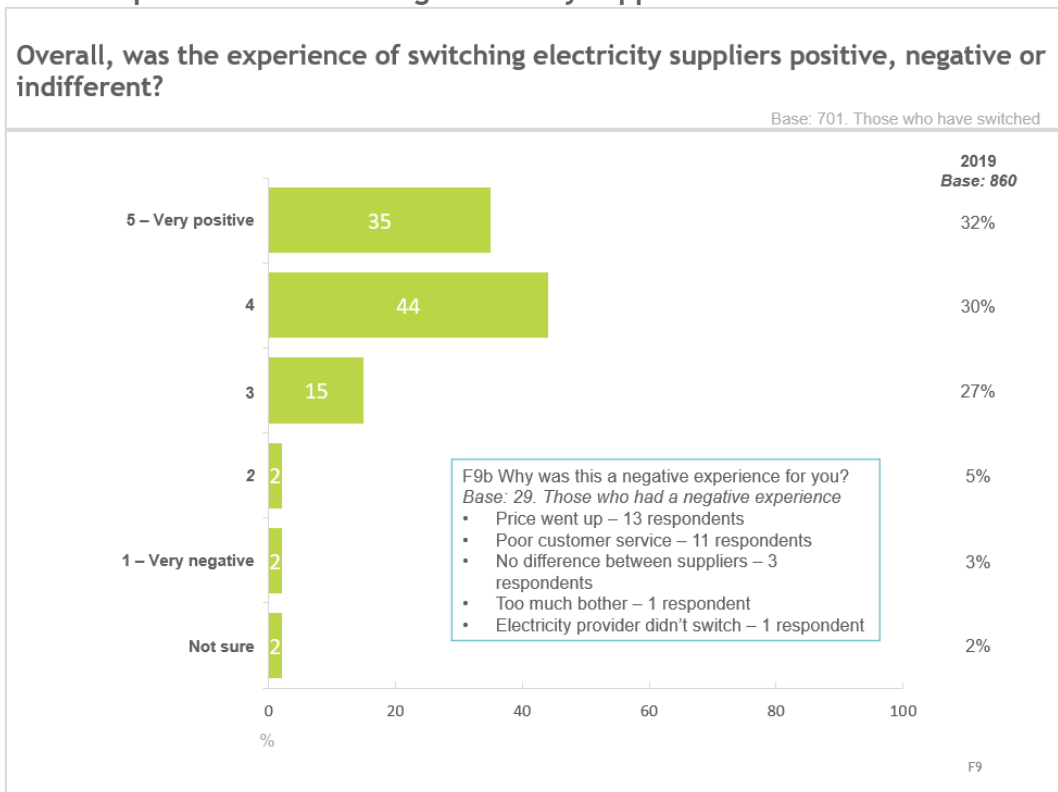


Figure 8.17 Experience of switching electricity supplier



**Table 8.11 Experience of switching electricity supplier by internet access and confidence**

		Negative	Neither	Positive	Can't remember	Total
Overall	All Base: 701	4%	15%	79%	2%	100%
Internet access	Yes Base: 668	3%	15%	80%	1%	100%
	No Base: 33	18%	12%	64%	6%	100%
Confidence using internet	Not confident Base: 103	8%	19%	70%	3%	100%
	Neither Base: 120	1%	11%	85%	3%	100%
	Confident Base: 478	4%	15%	80%	1%	100%

### Gas

Almost all (41 respondents out of 48) who switched gas supplier agreed that they received the deal that had expected.

34 respondents had a positive (rating '4' or '5') experience of switching compared to 1 respondent who had a negative experience.



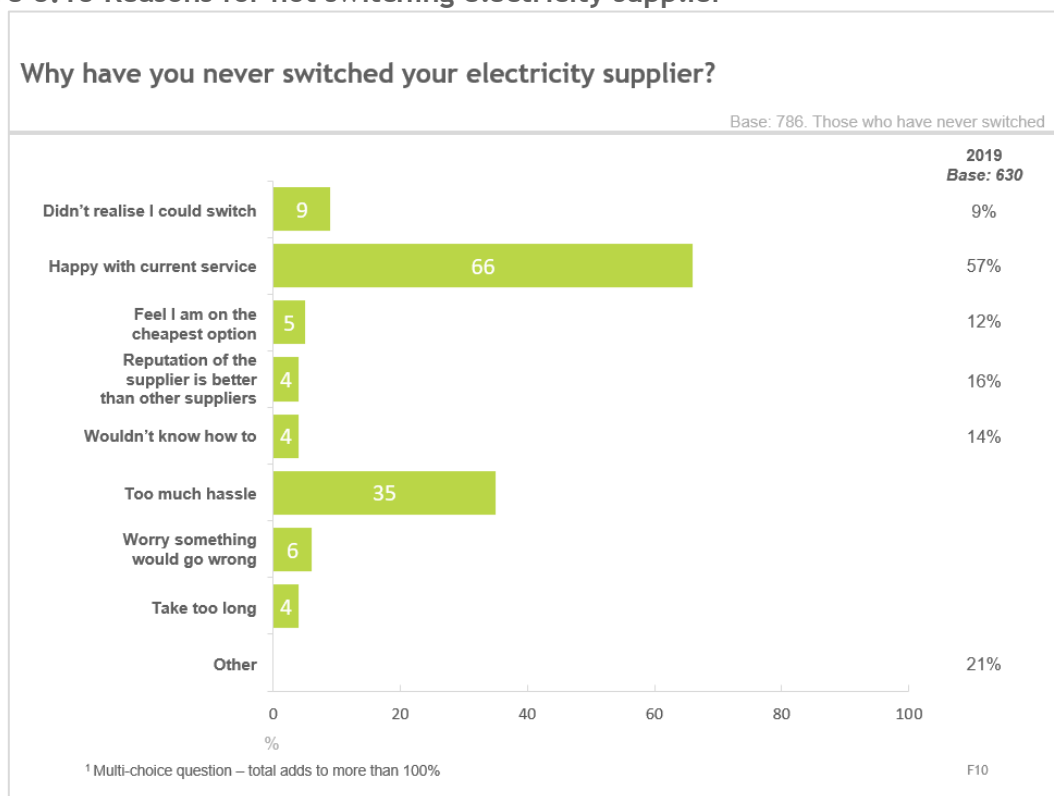
Electricity and gas customers were more likely to have had a positive experience of switching than in 2019, when 62% of those who switched electricity and 58% of those who switched gas supplier reported having a positive experience (79% and 66% in 2021 respectively) (see Figure 7.19).

### Reasons for not switching

#### Electricity

When asked why they had never switched electricity supplier, two thirds (66%) said it was because they were happy with their current service, while a further one third (35%) thought it would be too much hassle to switch. 9% of respondents were unaware that they could switch their electricity supplier (see Figure 8.18).

Figure 8.18 Reasons for not switching electricity supplier



There were significant differences in the reasons for not switching between the subgroups (see Table 8.12):

- Three quarters (74%) of 65 plus year olds who had not switched said they were happy with their current service, compared to 49% of 18- to 34-year-olds. Younger respondents were also more likely to say they were unaware they could switch (19%);
- C2DE respondents (11%) were more likely to say they did not realise they could switch compared to ABC1 respondents (5%); and
- Those living in the least deprived areas (46%) were more likely than those in the most deprived areas (30%) to think that switching would be too much hassle.



**Table 8.12 Reasons for not switching electricity supplier by demographics, deprivation and payment method**

		Didn't realise I could switch	Happy with current service	Cheapest option	Better reputation	Wouldn't know how to	Hassle	Worry something would go wrong	Take too long
Overall	All Base: 701	9%	66%	5%	4%	4%	35%	6%	4%
Age	Under 35 Base: 152	19%	49%	11%	3%	5%	31%	3%	5%
	35-44 Base: 121	7%	70%	3%	6%	2%	36%	7%	3%
	45-64 Base: 242	5%	65%	3%	6%	4%	36%	9%	6%
	65 plus Base: 246	7%	74%	3%	3%	4%	36%	6%	2%
Deprivation	1 – Most deprived Base: 122	9%	69%	5%	2%	6%	30%	7%	3%
	2 Base: 142	6%	69%	4%	3%	4%	31%	5%	2%
	3 Base: 186	11%	67%	4%	6%	4%	30%	3%	2%
	4 Base: 198	9%	67%	5%	5%	3%	37%	8%	4%
	5 – Least deprived Base: 138	9%	58%	6%	5%	3%	46%	10%	9%

### Gas

Gas customers who had the option to switch gave similar reasons for not switching supplier as electricity customers, with 61% saying they were happy with their current service and 28% believing it would be too much hassle to switch. 8% also claimed that they would not know how to go about switching, while 6% did not realise they could switch supplier (see Figure 8.19). Those with a prepayment meter for gas (72%) were significantly more likely to be happy with their current service compared to those with a credit meter (50%), while those with a credit meter were more likely to be concerned with the hassle switching would cause (34% compared to 22%) (see Table 8.13).

Figure 8.19 Reasons for not switching gas supplier

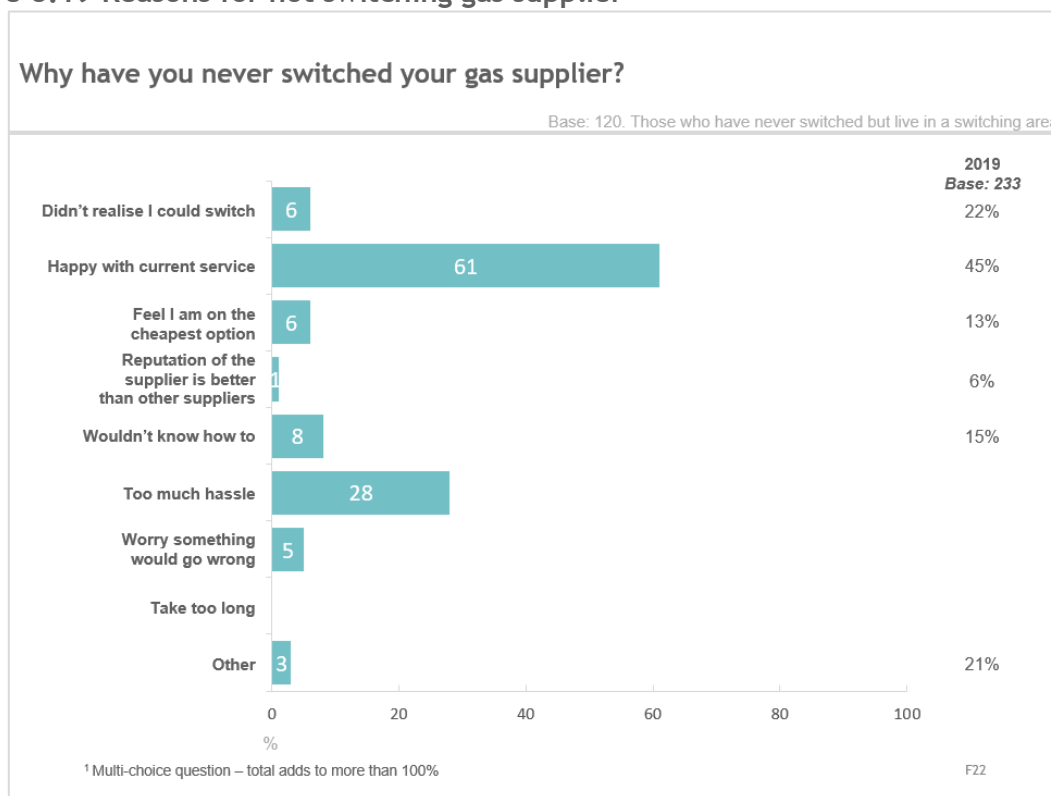


Table 8.13 Reasons for not switching gas supplier by payment method

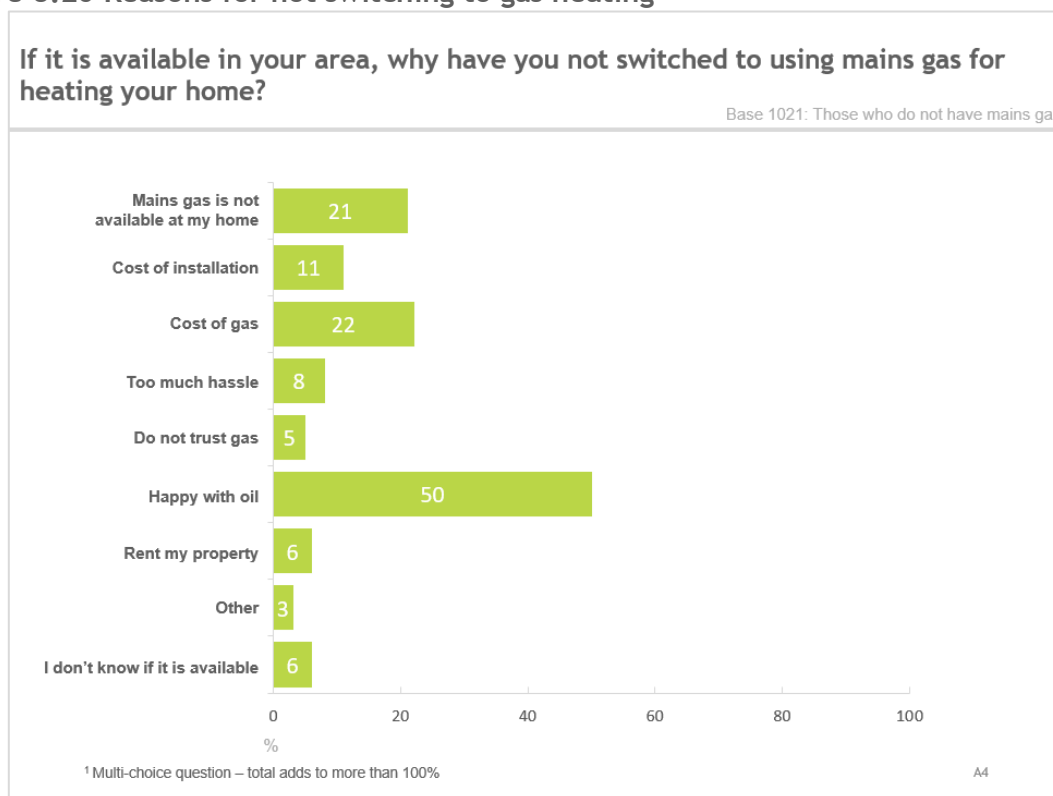
		Didn't realise I could switch	Happy with current service	Cheapest option	Better reputation	Wouldn't know how to	Hassle	Worry something would go wrong
Overall	All Base: 120	6%	61%	6%	1%	8%	28%	5%
Gas payment method	Prepayment meter Base: 58	7%	72%	-	2%	9%	22%	3%
	Credit meter Base: 62	5%	50%	11%	-	6%	34%	6%



Findings from the 2019 study show that being happy with the current service remains the most common reason for not switching electricity (57%, 66% in 2021) or gas (45%, 61% in 2021) suppliers. However, electricity customers were more likely to say the reputation of their current supplier is better (16%, 4% in 2021) and that they felt they were on the cheapest option (12%, 5% in 2021). The percentage of gas customers who were unaware that they could switch has also fallen from 22% to 6% (see Figures 8.12 and 8.13).

13% of respondents confirmed that they had access to gas in their area but did not have it installed in their home. Half (48%) of these respondents said the reason for this was because they were content with oil, while 25% and 20% respectively were concerned about the cost of gas and installation. 8% believed that mains gas is not available at their particular house and 4% did not know if gas was available at their home (see Figure 8.20).

Figure 8.20 Reasons for not switching to gas heating



The reasons for not wanting to switch to mains gas differed significantly between the various subgroups:

- Those aged 65 plus were more likely to think it would be too much hassle (28%) or were did not trust gas (10%) than those aged 18 to 34;
- Urban respondents (18%) were more likely to be concerned with the hassle of switching to gas, with no respondents living in rural areas giving this reason.

Table 8.14 Reasons for not switching gas heating by demographics and location

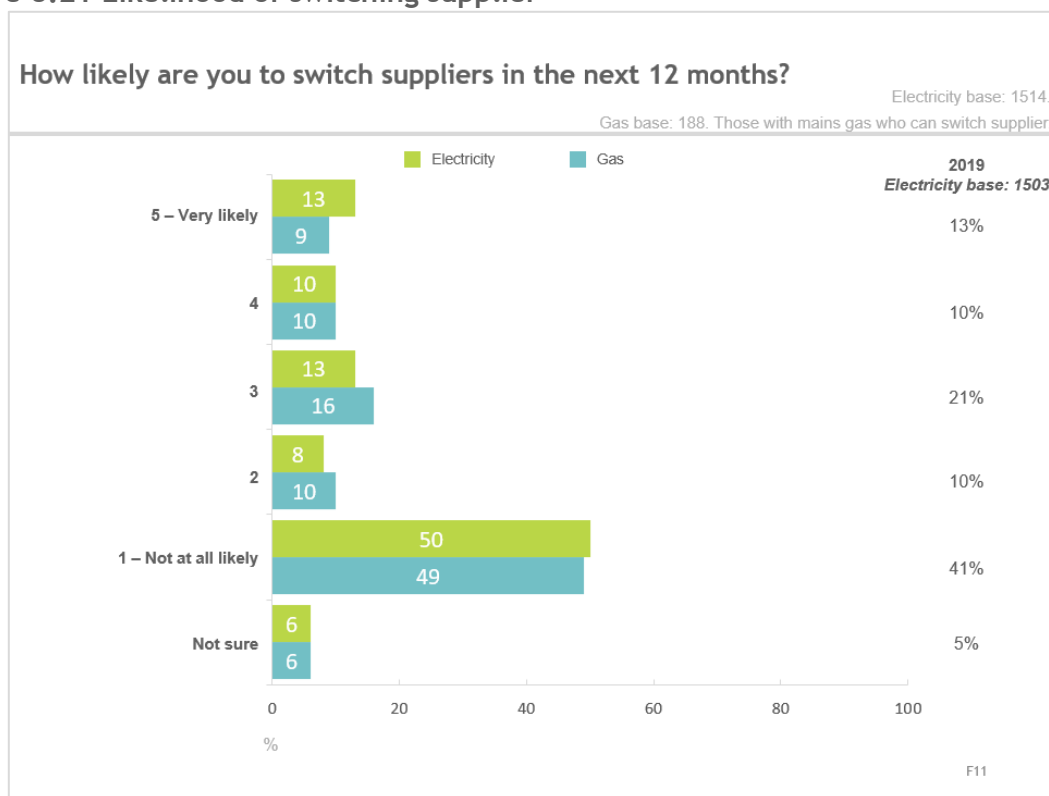
		Not available	Cost of installation	Cost of gas	Hassle	Don't trust gas	Happy with oil	Renting	Other	Don't know if it is available
Overall	All Base: 200	8%	20%	25%	15%	3%	48%	10%	4%	4%
Age	Under 35 Base: 45	7%	16%	18%	16%	-	38%	29%	7%	4%
	35-44 Base: 33	12%	21%	21%	6%	3%	36%	15%	6%	3%
	45-64 Base: 68	9%	25%	31%	10%	-	56%	1%	3%	4%
	65 plus Base: 50	6%	16%	28%	28%	10%	52%	2%	-	2%
Location	Urban Base: 169	7%	20%	24%	18%	3%	45%	11%	4%	4%
	Rural Base: 31	13%	19%	32%	-	3%	65%	6%	-	3%

## Likelihood of switching in the future

Just less than one quarter (23%) of electricity customers and 19% of gas customers said that they were quite or very likely to switch their supplier in the next 12 months.

One third (31%) of respondents with a prepayment meter for electricity confirmed that they were likely to switch suppliers, compared to 18% of with a credit meter.

Figure 8.21 Likelihood of switching supplier



Some subgroups were significantly more likely to switch supplier in the next year, with some similarities between electricity and gas consumers (see Tables 8.15 and 8.16). These included:

- 21% of 18 to 34 year olds said they would be likely to switch electricity supplier, compared to 11% of those aged 65 and over;
- Respondents living in urban areas (27%) were more likely to show intent to switch electricity supplier than rural respondents (18%);
- One quarter (25%) of those with internet access and 27% of confident internet users said they were likely to switch electricity supplier, compared to 7% without access and 11% who were not confident users. 86% of gas consumers who were not confident internet users said they it was unlikely that they would switch their supplier, compared to 57% of those who were confident users; and
- Both electricity and gas switchers were more likely to say they would switch again in the next year. 45% of electricity switchers and 35% of gas switchers said they were 'quite' or 'very' likely to switch, compared to 13% and 16% of electricity and gas customers respectively who had not switched.

**Table 8.15 Likelihood of switching electricity supplier by demographics, location, internet access, payment method and switching**

		Not likely	Neither	Likely	Don't know	Total
Overall	All <i>Base: 1514</i>	58%	13%	23%	6%	100%
Age	Under 35 <i>Base: 254</i>	55%	19%	21%	6%	100%
	35-44 <i>Base: 284</i>	44%	15%	35%	5%	100%
	45-64 <i>Base: 564</i>	56%	12%	26%	6%	100%
	65 plus <i>Base: 373</i>	77%	8%	11%	5%	100%
SEG	ABC1 <i>Base: 725</i>	57%	14%	25%	4%	100%
	C2DE <i>Base: 738</i>	60%	11%	22%	7%	100%
Location	Urban <i>Base: 912</i>	55%	13%	27%	5%	100%
	Rural <i>Base: 602</i>	64%	11%	18%	7%	100%
Internet access	Yes <i>Base: 1366</i>	56%	13%	25%	6%	100%
	No <i>Base: 148</i>	80%	7%	7%	6%	100%
Confidence using internet	Not confident <i>Base: 330</i>	74%	8%	11%	7%	100%
	Neither <i>Base: 233</i>	58%	15%	22%	5%	100%
	Confident <i>Base: 951</i>	53%	14%	27%	5%	100%
Electricity payment method	Prepayment meter <i>Base: 589</i>	52%	12%	31%	5%	100%
	Credit meter <i>Base: 925</i>	62%	13%	18%	6%	100%
Electricity switching	Switchers <i>Base: 469</i>	30%	19%	45%	5%	100%
	Non-switchers <i>Base: 1045</i>	71%	10%	13%	6%	100%

**Table 8.16 Likelihood of switching gas supplier by demographics, location, internet access, payment method and switching**

		Not likely	Neither	Likely	Don't know	Total
Overall	All <i>Base: 188</i>	60%	16%	18%	6%	100%
Age	Under 35 <i>Base: 40</i>	55%	23%	13%	10%	100%
	35-44 <i>Base: 37</i>	46%	19%	27%	8%	100%
	45-64 <i>Base: 76</i>	63%	18%	16%	3%	100%
	65 plus <i>Base: 32</i>	69%	3%	22%	6%	100%
SEG	ABC1 <i>Base: 111</i>	61%	16%	17%	5%	100%
	C2DE <i>Base: 75</i>	57%	16%	20%	7%	100%
Location	Urban <i>Base: 170</i>	59%	16%	18%	6%	100%
	Rural <i>Base: 18</i>	61%	22%	17%	-	100%
Internet access	Yes <i>Base: 181</i>	59%	17%	18%	6%	100%
	No <i>Base: 7</i>	86%	-	14%	-	100%
Confidence using internet	Not confident <i>Base: 29</i>	86%	-	14%	-	100%
	Neither <i>Base: 25</i>	40%	28%	28%	4%	100%
Gas switching	Confident <i>Base: 134</i>	57%	18%	17%	7%	100%
	Switchers <i>Base: 26</i>	31%	31%	35%	4%	100%
	Non-switchers <i>Base: 162</i>	64%	14%	15%	6%	100%



The likelihood of switching energy supplier in the next year has not changed from 2019, with 23% saying they were quite or very likely to switch in both the 2019 and 2021 Tracker (see Figure 8.20).

# 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

- 98% of domestic consumers and 99% of gas customers report that they are always or usually able to keep up with their electricity and gas bills.
- 19% of respondents with a prepayment meter reported that they had run out of money on their meter and gone without electricity over the past year, compared to 1% of those with a credit meter (ie those who pay by direct debit or on receipt of bill) who were unable to afford electricity.
- 4% and 3% report that they have had to delay or go without other essentials so that they could pay for electricity and gas respectively.
- One third of domestic consumers stated that, over the last year, they have reduced the amount of electricity they use, while 28% of gas customers have reduced the amount of gas they use. This suggests that, rather than opting to not pay electricity and gas bills, consumers may be choosing to reduce their usage instead to ensure bills are affordable.

## 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 Figure 9.1). The majority (85%) of respondents reported that they never struggle to pay their electricity bills. 13% sometimes struggle to pay their bills but usually were able to keep on top of them, while 1% said that they were often behind in their payments. Those who have a prepayment meter for electricity (21%) were more likely to say they sometimes struggle to pay their bills compared to those with a credit meter who pay using other methods (8%).

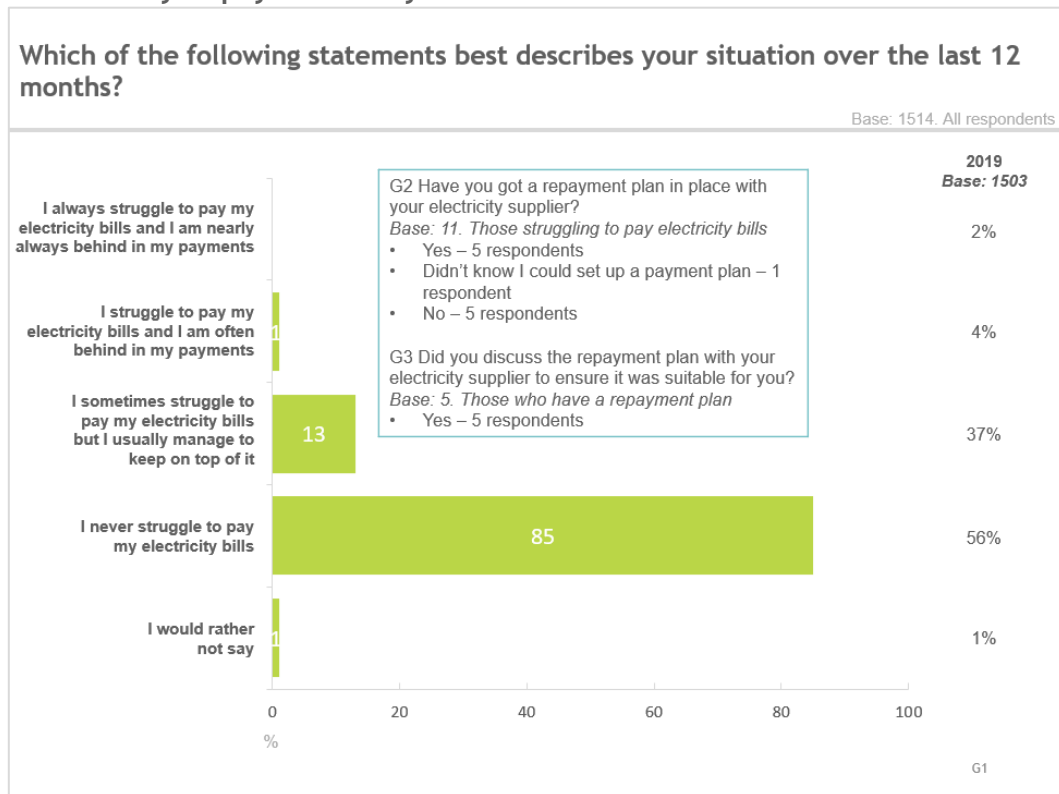
Of the 11 domestic consumers who often or always struggle to pay electricity bills, 5 of those had a repayment plan in place with their supplier, all of which had discussed this plan with their supplier to ensure it was suitable for them.

The majority (84%) of gas consumers also stated that they never struggle to pay their gas bills and 15% said that they sometimes struggle but were able to manage their bills, with customers on a prepayment meter (18%, compared to 10% with a credit meter) again more likely to say they sometimes struggle to pay their bills. Only 2 respondents said that they were often behind on their payments, neither of which reported having a repayment plan in place with their gas supplier (see Figure 9.2).

The following significant differences were observed in the demographics of respondents (see Tables 9.1 and 9.2):

- Respondents in the C2DE SEG (17%) were more likely to say they sometimes struggle to pay electricity bills than those in the ABC1 group (10%);
- C2DE respondents (21%) were also more likely to sometimes struggle to pay their gas bills than ABC1 respondents (9%);
- 17% and 20% of those living in the most deprived areas sometimes struggled to pay electricity and gas bills respectively, compared to 8% and 6% in the least deprived areas.

Figure 9.1 Ability to pay electricity bills

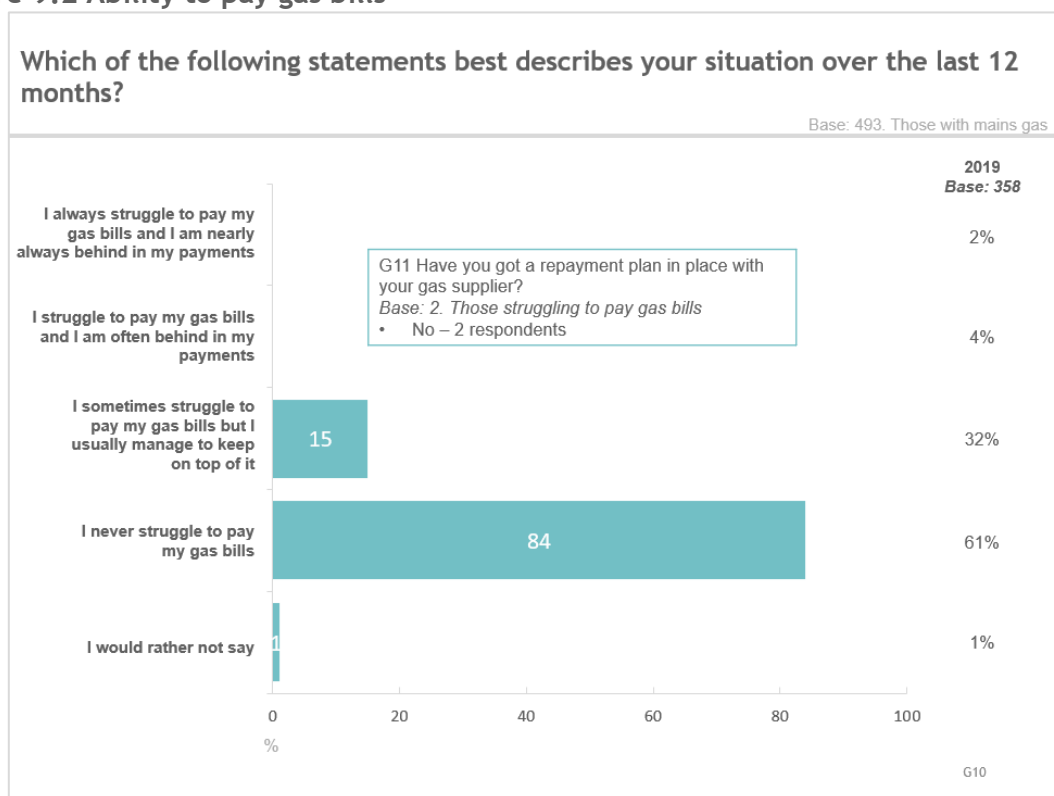




**Table 9.1 Ability to pay electricity bills by demographics, deprivation and payment method**

		Never struggle to pay electricity bills	Sometimes struggle to pay electricity bills but usually manage to keep on top of it	Struggle to pay electricity bills and are often behind in payments	Always struggle to pay electricity bills and are nearly always behind in payments	Prefer not to say	Total
Overall	All Base: 1514	85%	13%	1%	0%	1%	100%
SEG	ABC1 Base: 725	89%	10%	0%	0%	0%	100%
	C2DE Base: 738	81%	17%	1%	0%	1%	100%
MDM Quintile	1 - Most deprived Base: 283	81%	17%	1%	0%	1%	100%
	2 Base: 272	82%	18%	-	0%	-	100%
	3 Base: 321	87%	12%	0%	-	1%	100%
	4 Base: 335	85%	13%	1%	0%	1%	100%
	5 - Least deprived Base: 303	90%	8%	0%	-	1%	100%
Electricity payment method	Prepayment meter Base: 589	78%	21%	1%	0%	0%	100%
	Credit meter Base: 925	90%	8%	0%	0%	1%	100%

**Figure 9.2 Ability to pay gas bills**



**Table 9.2 Ability to pay gas bills by demographics, deprivation and payment method**

		Never struggle to pay gas bills	Sometimes struggle to pay gas bills but usually manage to keep on top of it	Struggle to pay gas bills and are often behind in payments	Always struggle to pay gas bills and are nearly always behind in payments	Prefer not to say	Total
Overall	All Base: 493	84%	15%	0%	-	1%	100%
SEG	ABC1 Base: 242	90%	9%	-	-	0%	100%
	C2DE Base: 235	78%	21%	0%	-	0%	100%
MDM Quintile	1 - Most deprived Base: 129	78%	20%	2%	-	1%	100%
	2 Base: 62	81%	19%	-	-	-	100%
	3 Base: 74	78%	20%	-	-	1%	100%
	4 Base: 81	86%	14%	-	-	-	100%
	5 - Least deprived Base: 147	93%	6%	-	-	1%	100%
Gas payment method	Prepayment meter Base: 279	80%	18%	1%	-	1%	100%
	Credit meter Base: 214	89%	10%	-	-	0%	100%



The 2021 survey respondents are more likely to state that they are able to pay their electricity bills compared to the 2019 Tracker. In 2019, 37% said that they sometimes struggle to pay their bills (compared to 13% in 2021), while 6% said that they were often or nearly always behind on their payments (1% in 2021) (see Figure 9.1). This is also true for gas customers, with one third (32%) saying that they usually manage to stay on top of their bills (15% in 2021) and 6% saying that they are often or always behind on payments (only 2 respondents in 2021) (see Figure 9.2).

## Reasons for being without energy

### Electricity

Almost all (98%) respondents with a credit meter said that they had never gone without electricity that they needed because of the cost, with 1% saying this occurred a few times a year (see Figure 7.3). Respondents with an electricity prepayment meter were more likely than credit customers to have run out of credit on their meter and gone without electricity in the past 12 months. 15% had occasionally gone without electricity, and 3% said this happened around once a month. 1% also mentioned that they go without electricity most weeks (see Figure 9.4).

Figure 9.3 Incidence of going without electricity (no prepayment meter)

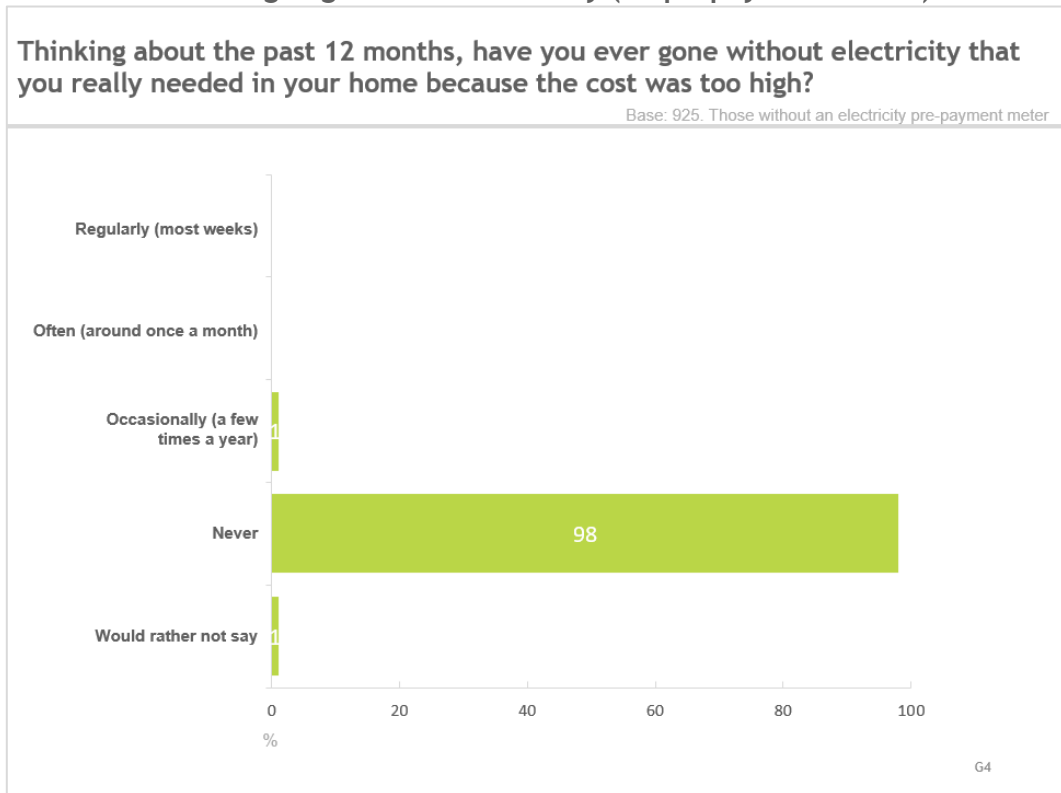
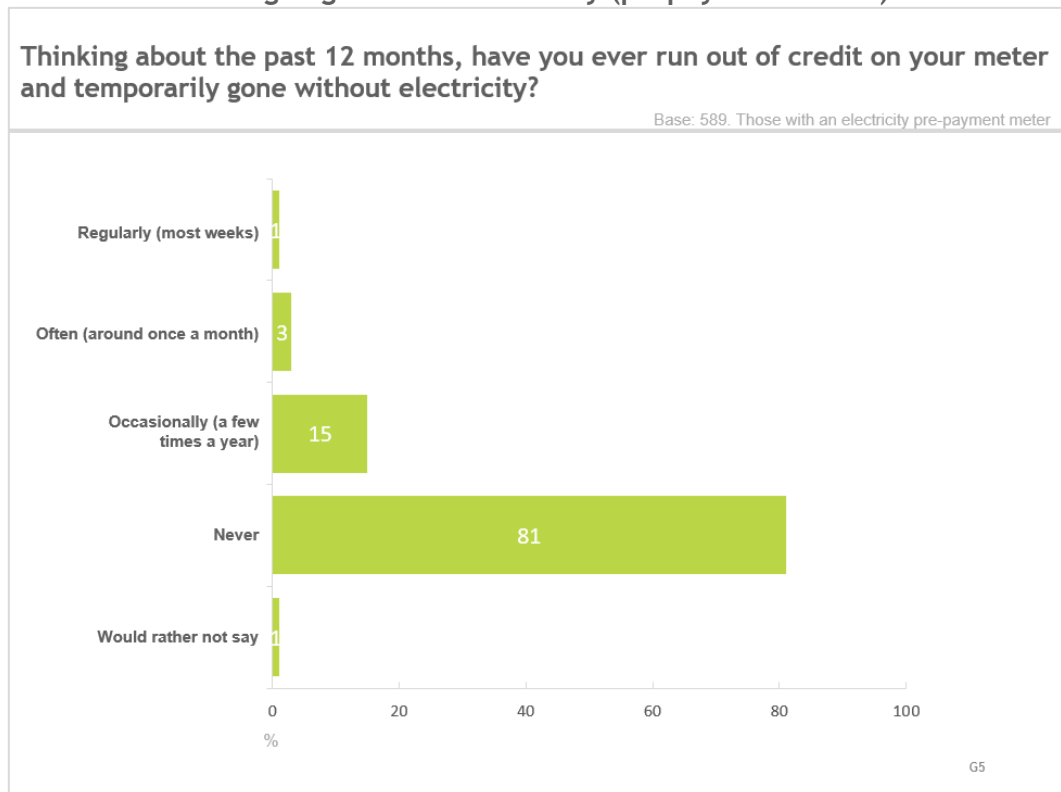
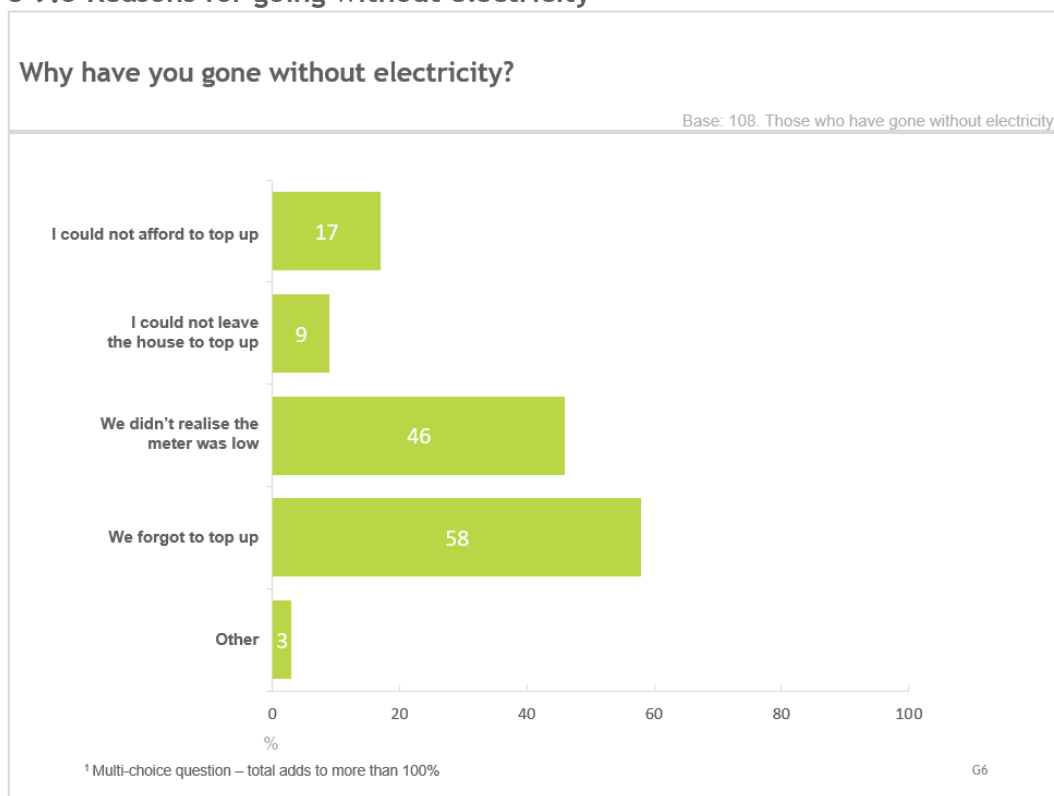


Figure 9.4 Incidence of going without electricity (prepayment meter)



Of those respondents with a prepayment meter who had run out of credit on the meter and temporarily gone without electricity, 58% said that they had forgotten to top up, and 46% did not realise that the meter was low. 17% reported that they could not afford to top up.

Figure 9.5 Reasons for going without electricity



All respondents were asked if they had gone without electricity or had delayed getting essentials so that they would be able to pay for electricity. While the vast majority (96%) confirmed that this was not something they had to do, 3% reported that they had to do this between one and three times this year, and 1% had to do this less often than once a month (see Figure 9.6).

Those who were significantly more likely to have gone without getting other essentials to pay for electricity included (see Table 9.3):

- 6% of C2DE respondents had gone without getting other essentials in the last 12 months, compared to ~0% of ABC1 respondents; and
- 7% of those living in the most deprived quintile had gone without getting essentials compared to 2%-3% in the least deprived quintiles.

Figure 9.6 Incidence of delaying getting essentials to pay for electricity

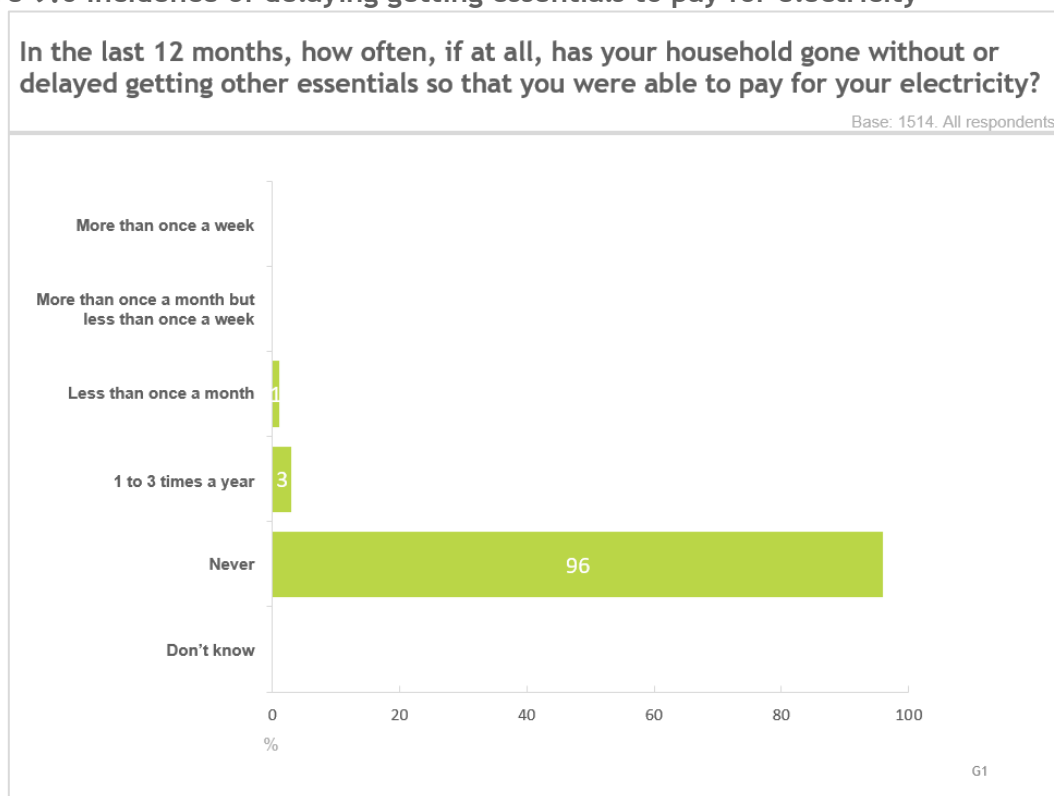


Table 9.3 Incidence of delaying getting essentials to pay for electricity by demographics and deprivation

		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	Total
Overall	All Base: 1514	96%	3%	1%	0%	0%	0%	100%
SEG	ABC1 Base: 725	99%	0%	0%	0%	0%	0%	100%
	C2DE Base: 738	94%	4%	1%	1%	0%	-	100%
	MDM Quintile							
	1 - Most deprived Base: 283	93%	5%	2%	0%	-	-	100%
	2 Base: 272	94%	4%	-	1%	1%	-	100%
	3 Base: 321	98%	2%	-	0%	-	0%	100%
	4 Base: 335	98%	1%	-	0%	-	1%	100%
	5 - Least deprived Base: 303	97%	2%	1%	-	-	0%	100%

### Gas

Of those with a gas credit meter, 2% revealed that they have had to occasionally go without gas in the past 12 months because the cost was too high (see Figure 7.7). Of those who have a gas prepayment meter, 17% reported having occasionally run out of credit (see Figure 7.8).

Of the 17% or 54 respondents with a PPM who had gone without gas, 23 said that they had forgotten to top up and 20 reported that they could not afford to top up.

Figure 9.7 Incidence of going without gas (no prepayment meter)

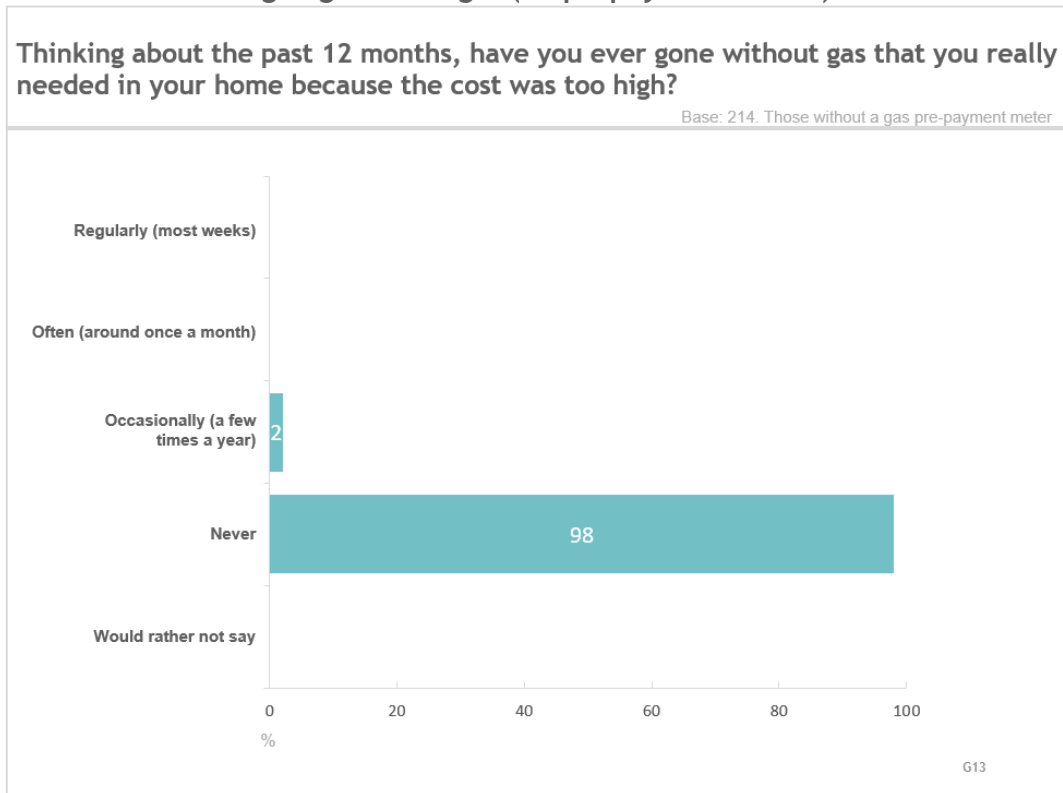
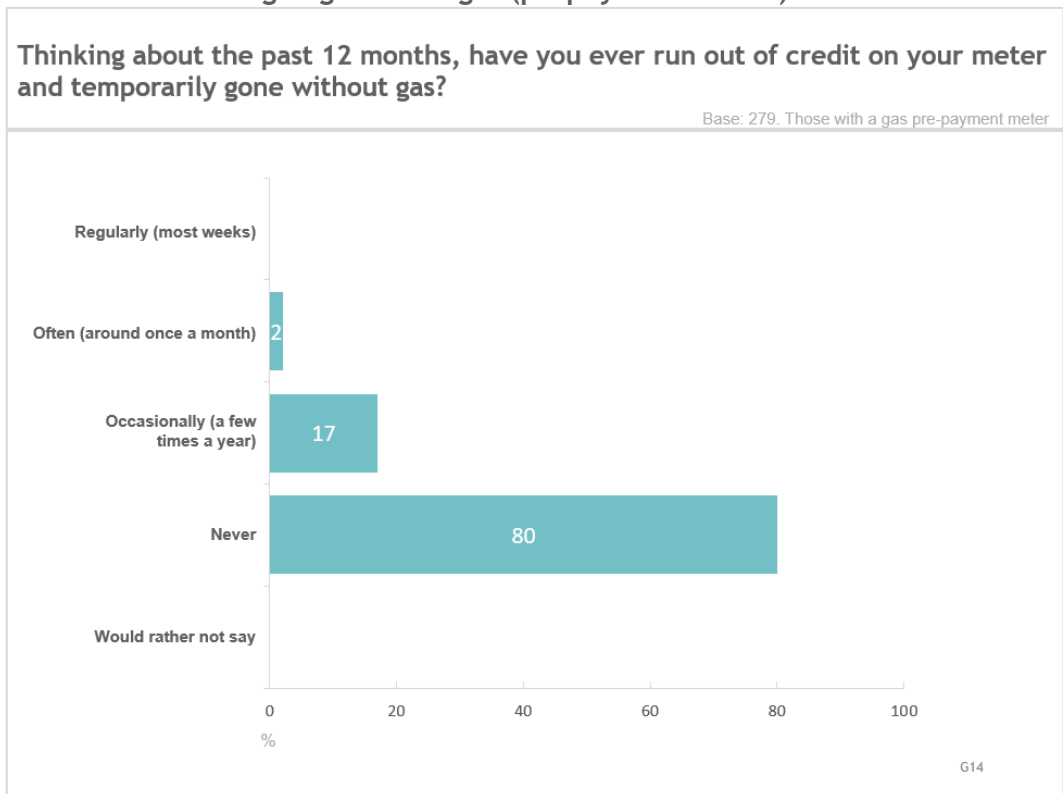
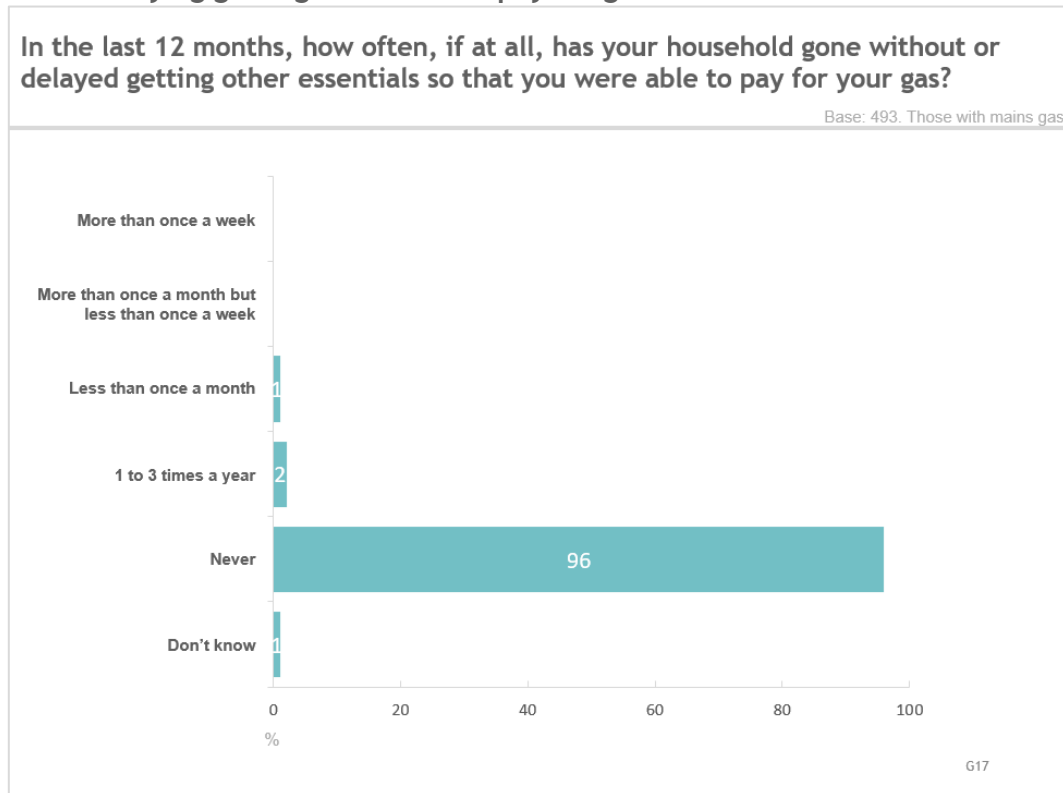


Figure 9.8 Incidence of going without gas (prepayment meter)



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. 3% confirmed that this was the case for them on at least one occasion in the last 12 months.

Figure 9.9 Delaying getting essentials to pay for gas



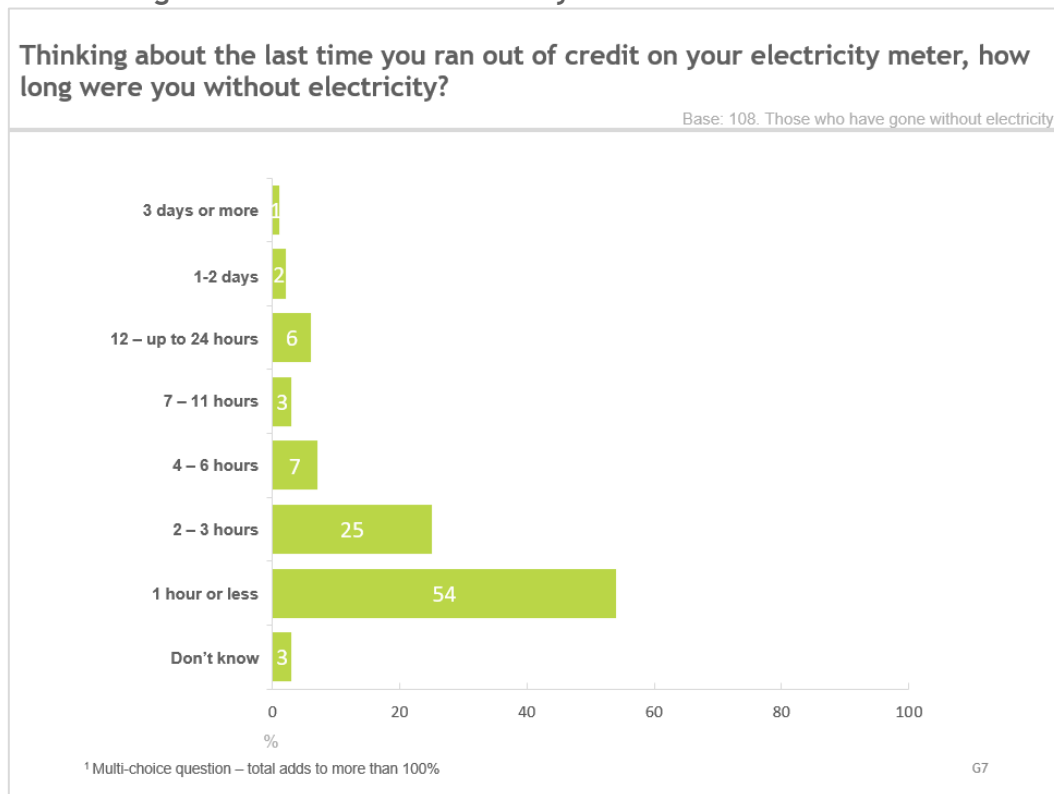
## Length of time without energy

Those with a prepayment meter who had run out of credit were asked how long they were without electricity and/or gas.

### **Electricity**

Almost all (95%) respondents who ran out of credit on their electricity prepayment meter reported that their supply was restored on the same day, including 54% who were without their electricity for up to one hour. However, 3% stated that they were without electricity for longer than a day.

Figure 9.10 Length of time without electricity



### Gas

40 of the 54 respondents who ran out of credit on their gas prepayment meter reported that they had their supply restored within the same day; 12 respondents stated they were without gas for longer than a day.

### Methods to reduce spend on energy

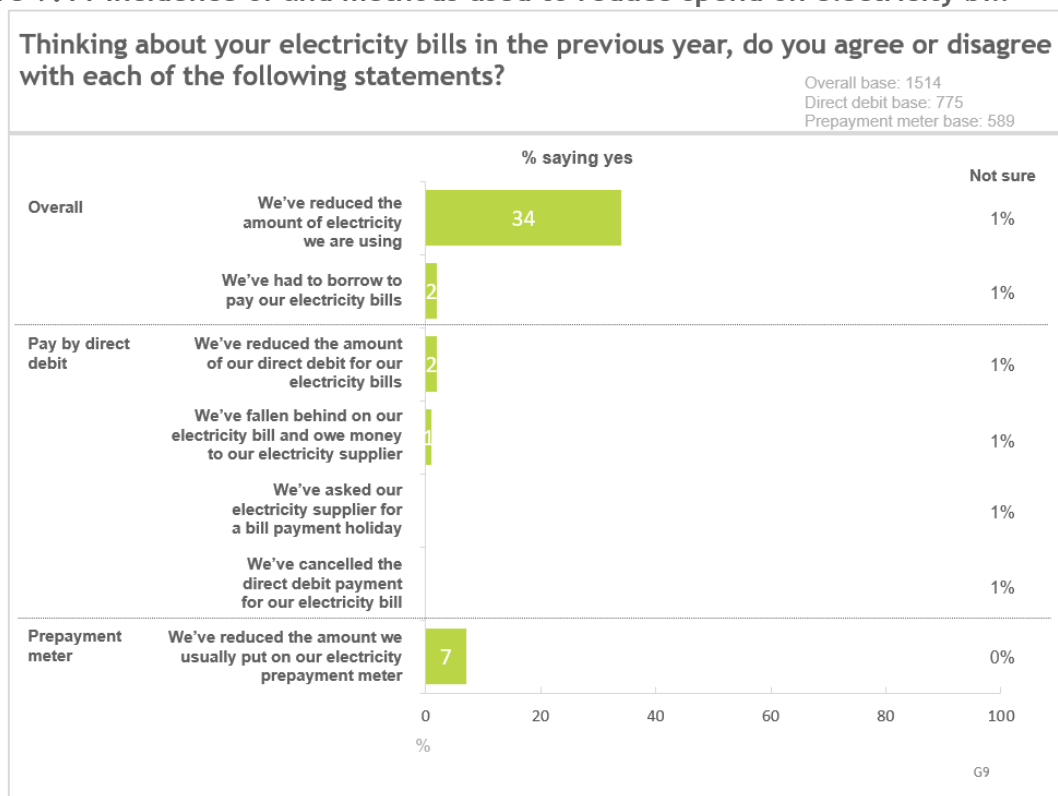
Respondents were presented with a number of statements about their energy usage and the payment of bills and asked to confirm if any applied to their situation over the last 12 months.

### Electricity

One third (34%) reported that they had reduced the amount of electricity they were using in the previous year, while 2% stated that they have had to borrow money to pay their electricity bills. 2% 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. 7% of respondents with an electricity prepayment meter stated that they had reduced the amount they usually put on their meter.



Figure 9.11 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 Table 9.4):

- Those aged 45 to 64 (39%) and over 65 (32%) were more likely to have reduced the amount of electricity they use compared to those aged between 18 and 34 (29%). It should be noted, as disclosed previously, younger respondents were also more likely to already have smaller energy bills;
- Respondents living in the most deprived areas (37%) were more likely to have reduced electricity usage compared to those living in the least deprived areas (27%);
- 38% of rural respondents confirmed that they have reduced their electricity usage, compared to 32% of urban respondents;
- Vulnerable consumers (37%) were more likely to have reduced usage compared to consumers who were not considered vulnerable (32%).

**Table 9.4 Reducing electricity usage by demographics, deprivation, location and vulnerability**

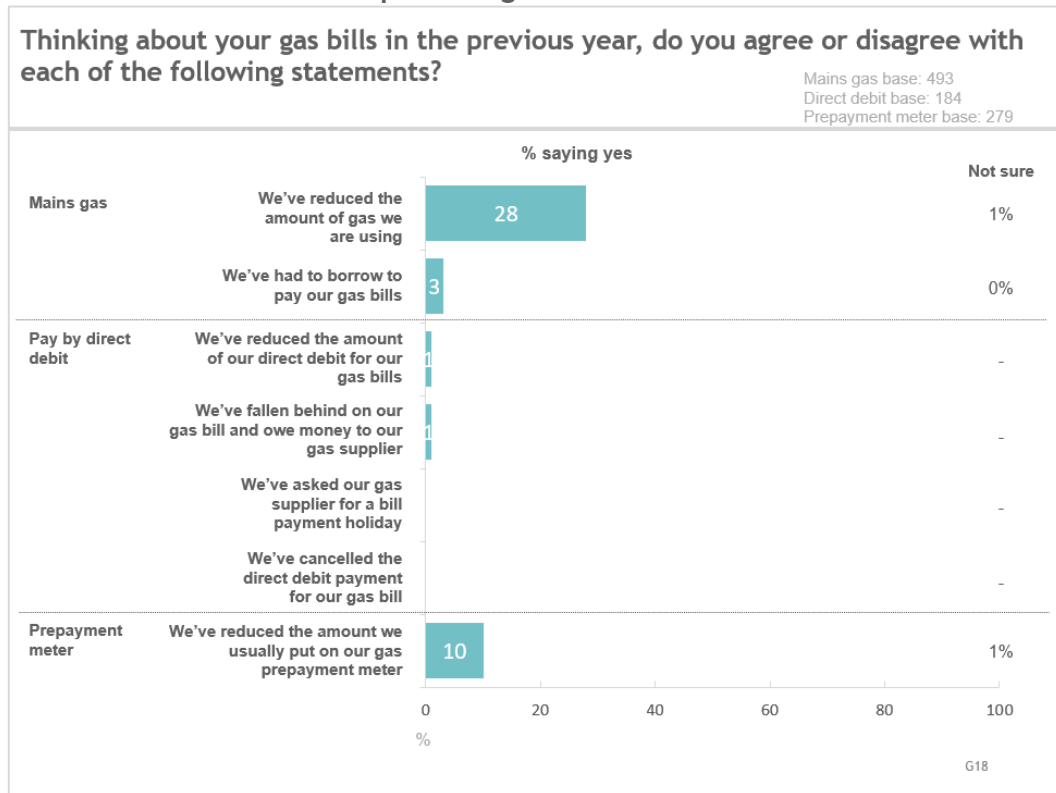
		Yes	No	Not sure	Total
Overall	All <i>Base: 1514</i>	34%	65%	1%	100%
Age	Under 35 <i>Base:254</i>	29%	70%	1%	100%
	35-44 <i>Base:284</i>	33%	67%	0%	100%
	45-64 <i>Base:564</i>	39%	61%	1%	100%
	65 plus <i>Base: 373</i>	32%	67%	1%	100%
	1 – Most deprived <i>Base: 283</i>	37%	62%	1%	100%
MDM Quintile	2 <i>Base: 272</i>	35%	65%	0%	100%
	3 <i>Base: 321</i>	36%	64%	1%	100%
	4 <i>Base: 335</i>	36%	63%	1%	100%
	5 – Least deprived <i>Base: 303</i>	27%	72%	1%	100%
	Location	Urban <i>Base: 912</i>	32%	68%	0%
Rural <i>Base: 602</i>		38%	61%	1%	100%
Vulnerability	High/medium vulnerability <i>Base: 597</i>	35%	64%	1%	100%
	Low vulnerability <i>Base: 133</i>	46%	54%	-	100%
	Not vulnerable <i>Base: 784</i>	32%	68%	1%	100%

### Gas

Those with gas were asked to confirm if the same set of statements applied to their situation over the last year (see Figure 9.12).

Over one quarter (28%) of gas customers stated that they had reduced the amount of gas they were using last year, while 3% reported that they had to borrow to cover their gas bills. 1% of customers with direct debit for their gas bills said they have reduced the amount of direct debit on their bill, and a further 1% stated that they owe money to their supplier. 10% of those with a gas prepayment meter revealed that they have reduced the amount they usually put on their meter.

Figure 9.12 Methods to reduce spend on gas bill



# 10. Consumer protections

In this section we determine the level of awareness among consumer 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.

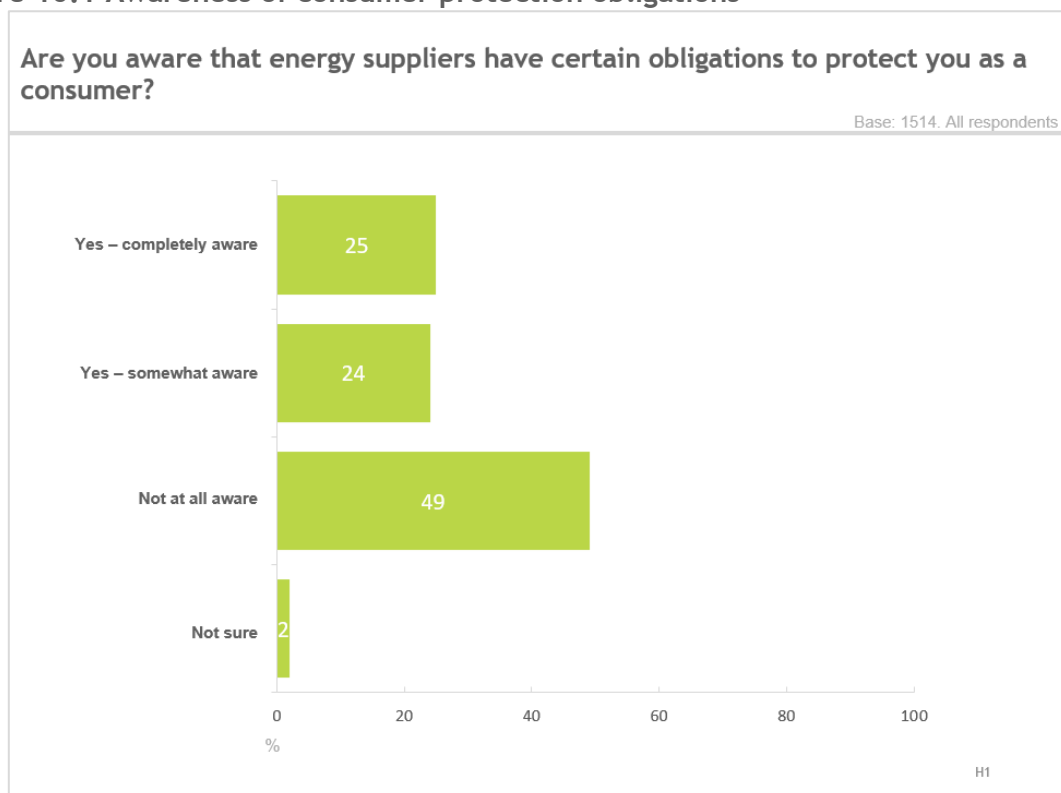
## Key findings

- Half (49%) of domestic consumers are aware that energy suppliers have obligations to protect them.
- Two thirds (66%) of 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.

Just under half (49%) of domestic consumers were aware that their energy supplier has an obligation to protect them as a consumer, including one quarter (25%) who were completely aware of this. However, 49% were not aware of the obligation.

Both electricity (53%) and gas (56%) customers who have a prepayment meter were more likely not to be aware of these obligations than those with a credit meter for electricity (46%) and gas (42%).

Figure 10.1 Awareness of consumer protection obligations



Awareness also differed significantly between various subgroups (see Table 10.1):

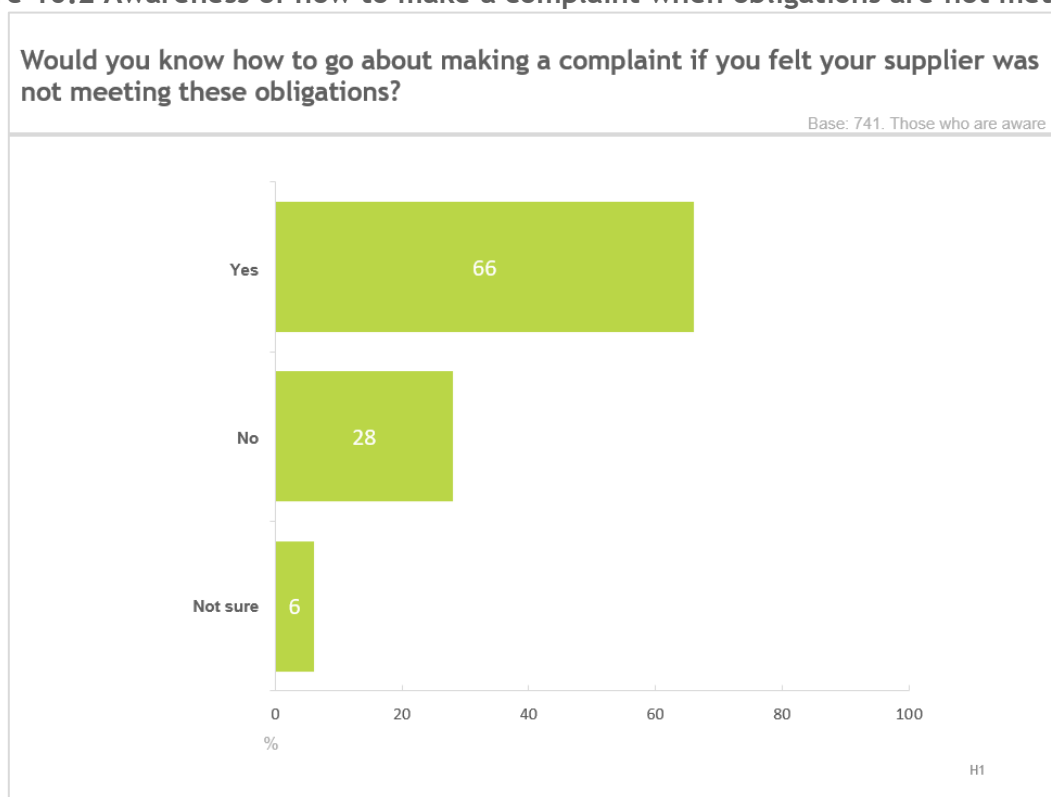
- Respondents aged 45 to 64 (54%) were most likely to report that they were aware of energy supplier's obligations;
- Over half (54%) of those in the ABC1 group were aware of their supplier's obligations to them, compared to 44% of C2DE respondents;
- Domestic consumers living in the most deprived areas (59%) were more likely than those in the least deprived areas (46%) to not be aware of the obligations;
- Those who owned their home (51%) tended to be aware of their supplier's obligations to them compared to those who privately rent (39%);
- Those with access to the internet (51%) and who were confident internet users (53%) were more likely to be aware than those without access (36%) and who were not confident as internet users (36%);
- 53% of those who were in the high or medium vulnerability category were not aware of their energy supplier's obligations, compared to 46% who were not vulnerable; and
- Domestic consumers who had switched either their electricity or gas supplier in the last three years (54%) were more likely to be aware of obligations than those who had not switched (47%).

**Table 10.1 Awareness of consumer protection obligations by demographics, deprivation, tenure, internet access, vulnerability, payment method and switching**

		Completely aware	Somewhat aware	Not aware	Not sure	Total
Overall	All Base: 1514	25%	24%	49%	2%	100%
Age	Under 35 Base: 254	20%	24%	54%	2%	100%
	35-44 Base: 284	24%	21%	54%	1%	100%
	45-64 Base: 564	27%	27%	44%	2%	100%
	65 plus Base: 373	21%	25%	51%	3%	100%
SEG	ABC1 Base: 725	28%	26%	44%	2%	100%
	C2DE Base: 738	22%	22%	55%	1%	100%
MDM Quintile	1 – Most deprived Base: 283	20%	19%	59%	2%	100%
	2 Base: 272	26%	26%	46%	1%	100%
	3 Base: 321	23%	25%	50%	2%	100%
	4 Base: 335	29%	23%	45%	3%	100%
	5 – Least deprived Base: 303	24%	28%	46%	2%	100%
Tenure	Own home Base: 1167	26%	25%	48%	1%	100%
	Private renting Base: 149	17%	21%	59%	2%	100%
	Social housing Base: 175	27%	17%	55%	1%	100%
Internet access	Yes Base: 1366	26%	25%	48%	2%	100%
	No Base: 148	16%	20%	59%	5%	100%
Confidence using internet	Not confident Base: 330	16%	20%	61%	2%	100%
	Neither Base: 233	22%	27%	50%	1%	100%
	Confident Base: 951	28%	25%	45%	2%	100%
Vulnerability	High/ medium vulnerability Base: 597	21%	24%	53%	2%	100%
	Low vulnerability Base: 133	23%	25%	51%	1%	100%
	Not vulnerable Base: 784	28%	24%	46%	2%	100%
Electricity payment method	Prepayment meter Base: 589	22%	23%	53%	1%	100%
	Credit meter Base: 925	26%	25%	46%	2%	100%
Gas payment method	Prepayment meter Base: 279	22%	21%	56%	2%	100%
	Credit meter Base: 214	28%	28%	42%	3%	100%
Switching	Switchers Base: 472	29%	25%	46%	1%	100%
	Non-switchers Base: 1042	23%	24%	51%	2%	100%

Of those who were aware, two thirds (66%) stated that they would know how to make a complaint if they felt their supplier was not meeting these obligations. Domestic consumers in the ABC1 group (71%), who live in urban areas (69%), and who were confident internet users (71%) were all more likely to know how to make a complaint.

**Figure 10.2 Awareness of how to make a complaint when obligations are not met**



**Table 10.2 Awareness of how to make a complaint when obligations are not met by demographics, location and internet use**

		Yes	No	Not sure	Total
Overall	All Base: 741	66%	28%	6%	100%
SEG	ABC1 Base: 392	71%	24%	5%	100%
	C2DE Base: 326	59%	33%	7%	100%
Location	Urban Base: 445	69%	25%	6%	100%
	Rural Base: 296	61%	33%	6%	100%
	Not confident Base: 120	58%	32%	11%	100%
Internet confidence	Neither Base: 113	53%	40%	7%	100%
	Confident Base: 508	71%	25%	4%	100%

# 11. Support services

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

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

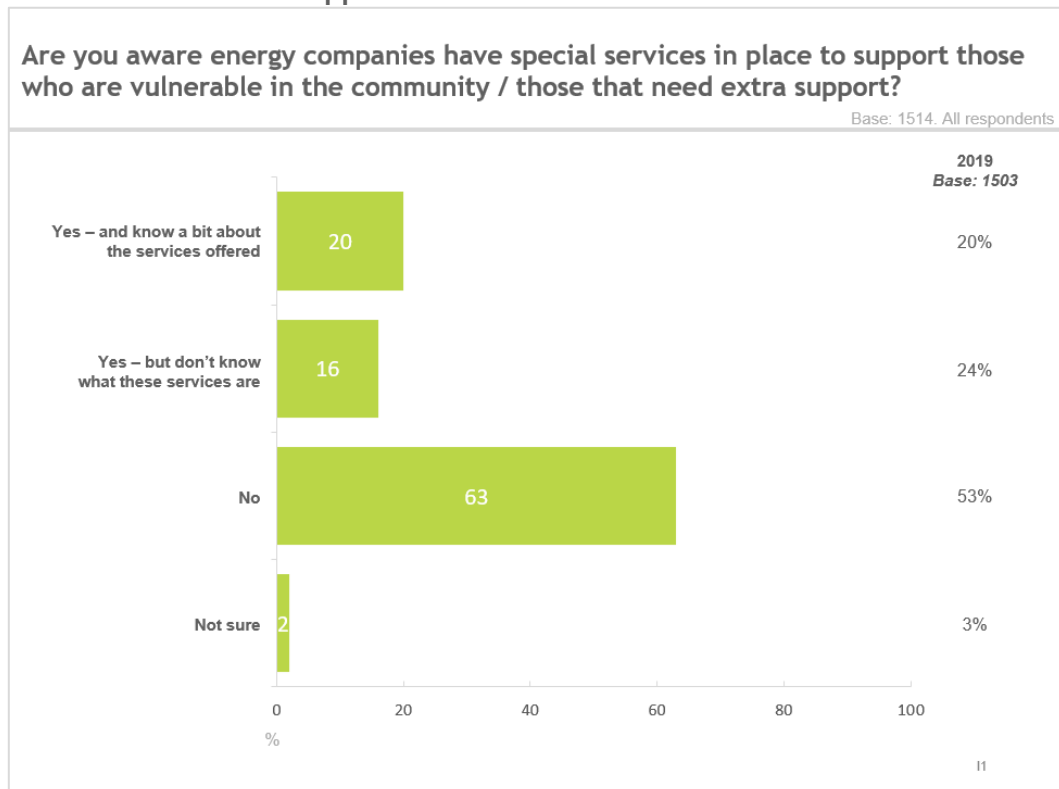
## Key findings

- Just under two thirds (63%) of domestic consumers were not aware of the special services offered by energy companies to consumers who are vulnerable or who require extra support.
- 4% were signed up to or had utilised some of the support service offered by energy companies.
- The majority (95%) of those in the high or medium vulnerability group had not signed up to utilise any of the support services offered by energy companies.

## Awareness of support services

Over one third (36%) of respondents indicated that they were aware that energy companies have support services for vulnerable customers, with 20% knowing something about what type of services are offered. However, 63% were not aware that support is available.

Figure 11.1 Awareness of support services





Domestic consumers who had an electricity prepayment meter (70%) were more likely not to be aware of the services compared to those using a credit meter (58%). This was also true for gas customers, with 68% on a prepayment meter reporting that they were unaware compared to 52% using a credit meter. While there were no differences between vulnerable and non-vulnerable respondents in terms of not being aware of these support services, respondents who were not vulnerable (23%) were significantly more likely to be aware of the services and know a bit about them than those in the high and medium vulnerable group (17%)

Other sub-groups who were significantly more likely to not be aware of support services included:

- 69% of C2DE respondents, compared to 57% of those in the ABC1 group;
- Two thirds (67%) of those living in the most deprived areas, compared to 57% in the least deprived areas; and
- Almost three quarters (71%) of those who were not at all confident using the internet, compared to 61% and 60% who were quite or very confident respectively.

**Table 11.1 Awareness of support services by demographics, deprivation, internet confidence and payment method**

		Yes – know about services	No – don't know what services are	No	Not sure	Total
Overall	All Base: 1514	20%	16%	63%	2%	100%
SEG	ABC1 Base: 725	23%	18%	57%	1%	100%
	C2DE Base: 738	17%	13%	69%	1%	100%
MDM Quintile	1 – Most deprived Base: 283	20%	12%	67%	1%	100%
	2 Base: 272	21%	14%	62%	3%	100%
	3 Base: 321	17%	15%	66%	2%	100%
	4 Base: 335	20%	18%	61%	1%	100%
	5 – Least deprived Base: 303	23%	19%	57%	1%	100%
Internet confidence	Not confident Base: 330	14%	14%	69%	2%	100%
	Neither Base: 233	19%	15%	64%	1%	100%
	Confident Base: 951	22%	16%	60%	1%	100%
Vulnerability	High/medium vulnerability Base: 597	17%	17%	65%	2%	100%
	Low vulnerability Base: 133	17%	15%	66%	2%	100%
	Not vulnerable Base: 784	23%	15%	60%	2%	100%
Electricity payment method	Prepayment meter Base: 589	17%	11%	70%	1%	100%
	Credit meter Base: 925	22%	18%	58%	2%	100%
Gas payment method	Prepayment meter Base: 279	19%	12%	68%	1%	100%
	Credit meter Base: 279	27%	18%	52%	3%	100%



Knowledge of the support services offered by suppliers has decreased from 2019. 53% of respondents in the 2019 Tracker were unaware of any such support services (63% in 2021), while 44% were at least aware that these services existed. However, 20% knew a bit about the services being offered – the same as in 2021 (see Figure 9.1).

## Use of support services

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

- **NIE Network's 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 (96%) of domestic consumers had not used any of the support services. 2% were signed up to NIE Network's Critical Care Register, and 1% were signed up to their supplier's Customer Care Register. 5 respondents had requested a large print bill, and a further 5 respondents were included in the Password Scheme. 95% of those considered to be in high or medium vulnerability groups had not signed up for any of the support services.

18 of the 26 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. None of the respondents who were either blind or partially sighted had requested their bills in large print format. Only 3 respondents who would be considered vulnerable were included in the Password Scheme.

Figure 11.2 Use of support services

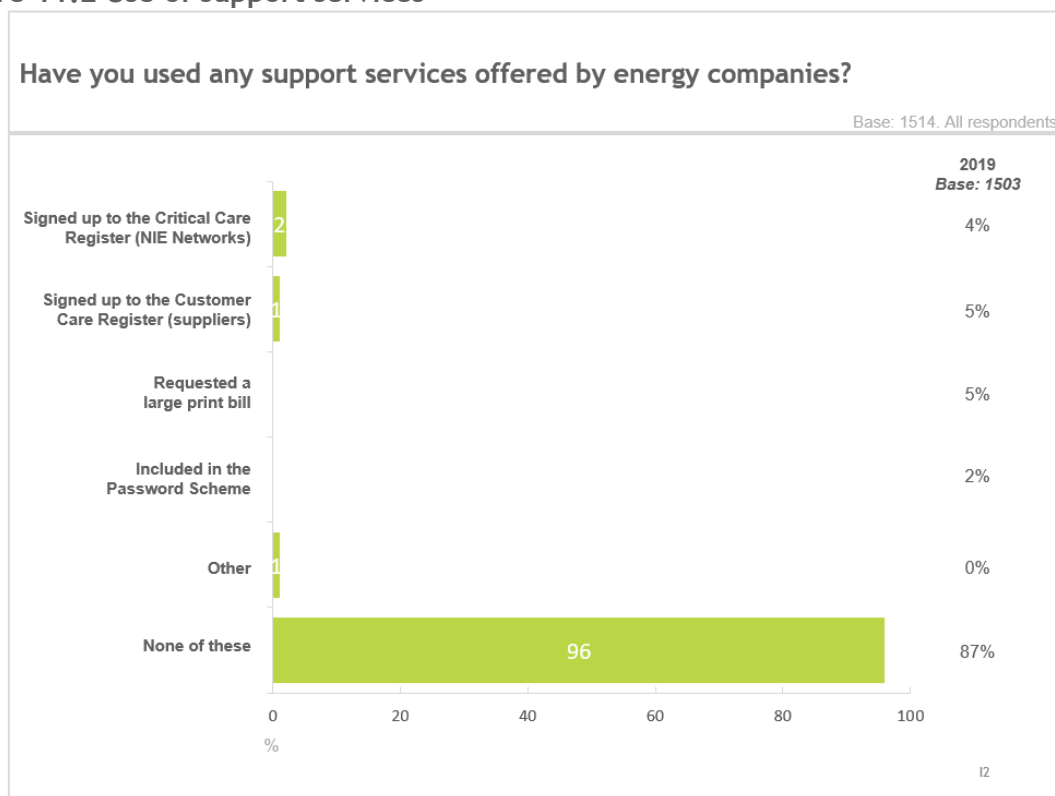


Table 11.2 Use of support services by vulnerability

	Overall Base: 1514	High/medium vulnerability Base 597	Low vulnerability Base: 133	Not vulnerable Base: 784
Signed up to the Critical Care Register	2%	3%	2%	1%
Signed up to the customer care register	1%	1%	1%	1%
Requested a large print bill	0%	1%	1%	0%
Included in the Password Scheme	0%	1%	-	0%
Other	1%	1%	-	1%
None of these	96%	95%	98%	98%



Domestic consumers in the 2019 Tracker were more likely to have used at least one of the support services, with 87% never using any of the services (compared to 96% in 2021). 5% were signed up to the Customer Care Register of their supplier (1% in 2021), and 5% had also requested a large print bill (5 respondents in 2021). 4% were signed up to the Critical Care Register (2% in 2021), while 2% had been included in the Password Scheme (5 respondents in 2021) (see Figure 9.2).

One potential explanation for the low awareness and take-up of these support services amongst vulnerable consumers is their access to and confidence in using the internet (see Table 11.3). Over one in five (22%) of respondents considered to be in the high or medium vulnerability group reported that they did not have access to the internet, whereas almost all those in the low vulnerability group (97%) and who are not vulnerable (98%) said they have access. Similarly, over two in five (43%) high or medium vulnerable consumers stated they

were not confident internet users, compared to 3% and 9% of low vulnerable and non-vulnerable respondents respectively.

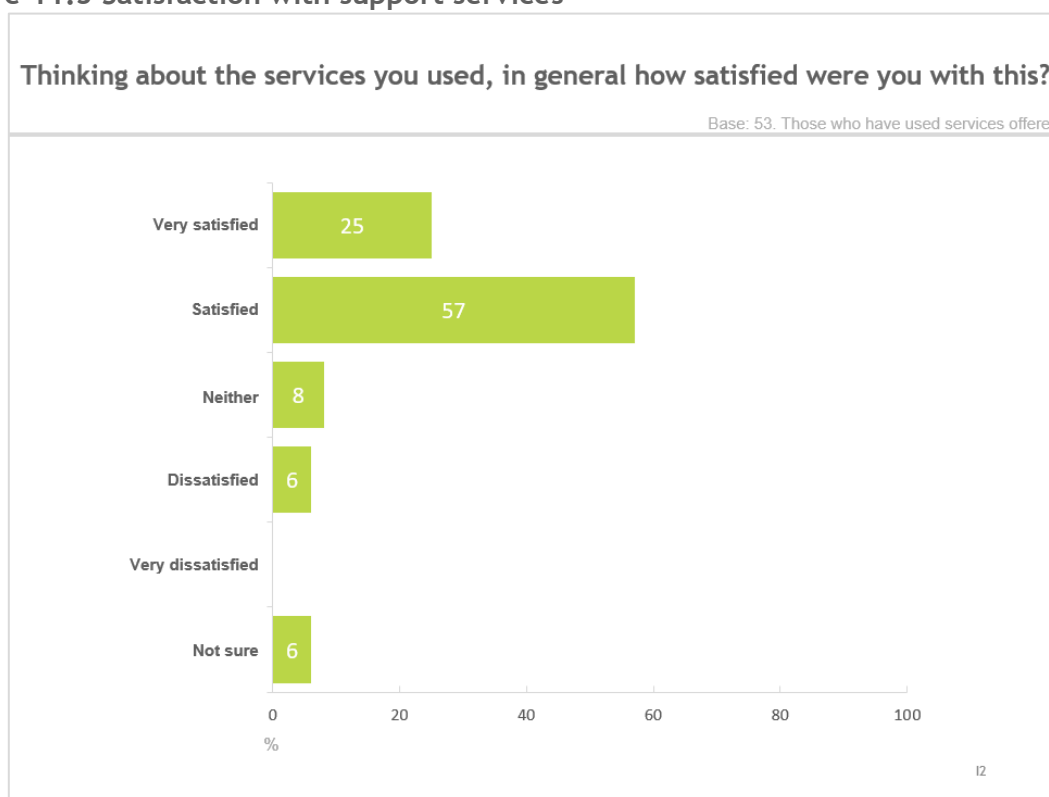
**Table 11.3 Internet access and confidence using the internet amongst vulnerable consumers**

		Overall Base: 1514	High/medium vulnerability Base 597	Low vulnerability Base: 133	Not vulnerable Base: 784
Internet access	Yes	90%	78%	97%	98%
	No	10%	22%	3%	2%
Internet confidence	Not confident	22%	43%	3%	9%
	Neither	15%	17%	17%	14%
	Confident	63%	40%	80%	77%

## Satisfaction with support services

43 of the 53 domestic consumers who had used at least one of the support services said they were 'satisfied' or 'very satisfied' with the service, with 3 respondents reporting dissatisfaction. 26 of the 31 respondents who signed up to NIE Network's Critical Customer Care Register reported satisfaction with the service, and 12 of the 13 who signed up to their suppliers Customer Care Register reported the same. 4 out of 5 respondents who requested a large print bill were satisfied, and all 5 of those included in the Password Scheme said they were 'satisfied' or 'very satisfied' (see Figure 11.3 and Table 11.3).

**Figure 11.3 Satisfaction with support services**



**Table 11.4 Satisfaction with support services (2021 vs. 2019)**

I3 Thinking about the services you used, in general how satisfied were you with this?	Signed up for the Critical Care Register		Signed up to the Customer Care Register		Requested a large print bill		Included in the Password Scheme	
	2021 <i>Base:31</i>	2019 <i>Base: 49</i>	2021 <i>Base: 13</i>	2019 <i>Base: 57</i>	2021 <i>Base: 5</i>	2019 <i>Base: 51</i>	2021 <i>Base: 5</i>	2019 <i>Base: 20</i>
<b>Satisfied</b>	84%	55%	92%	27%	80%	31%	100%	19%
<b>Dissatisfied</b>	10%	7%	-	21%	-	6%	-	22%

# 12. Conclusions and areas for consideration

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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. In highlighting the following areas, we have reflected on key priorities within the Utility Regulator's corporate strategy as follows:

- Improving consumer trust and satisfaction with energy suppliers;
- Improving knowledge and satisfaction with the consumer protection arrangements in NI; and
- Improving consumer satisfaction with the switching process.

## Impact of rising energy costs

At the time of this survey price increases were announced by most energy suppliers in Northern Ireland<sup>6</sup> and comparisons with the previous tracker in 2019 reveal that domestic consumers are now spending more on their energy.

These price increases may have had an impact on consumer behaviour. Although only a small percentage of domestic consumers reported having difficulties paying their energy bills and maintaining their supply, one third (34%) stated that they have reduced their electricity use in the past year and 28% of gas customers have also done so. The findings suggests that consumers may be reducing their energy usage to offset potential rising energy prices and to ensure their bills remain affordable. It is therefore important that any future policy decisions are set within this context and the likely impact on consumers is evaluated. The rising prices of energy may also have a 'knock on' effect on the appetite of consumers for future investment. Over half of respondents did not wish to incur any further expenditure on their electricity and gas bills to support investment in protecting the environment, supporting vulnerable consumers, or in improving the reliability of the network to ensure a secure supply of energy.

## The convenience of inertia over cost savings when choosing energy supplier

It is interesting that although around one third of consumers have taken action to reduce their energy usage, the incidence of switching both electricity and gas supplier has fallen since the 2019 tracker. Over half (52%) of respondents reported having never switched their electricity supplier, compared to two in five (40%) in 2019. There was a more dramatic difference in the incidence of gas switching, with nine in ten (86%) of those who have the option to saying they had never switched compared to under two thirds (63%) in 2019.

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<sup>6</sup> <https://www.bbc.co.uk/news/uk-northern-ireland-58558645>

Across both electricity and gas customers, satisfaction with their current service, and being worried about how much hassle switching would be, were the most common reasons given for not switching. This is despite switchers reporting a largely positive experience of the switching process. Both electricity and gas switchers were more likely than non-switchers to be confident that they were on the best deal available to them and that they received the deal they were expecting, while only a small percentage of non-switchers felt that they were already on the cheapest deal available. Switchers were also more likely to have intentions to switch again in the next 12 months.

The Utility Regulator may therefore wish to engage further with domestic consumers to ensure that they are aware of the best deal that is available to them, with older consumers and those who have no access to or confidence in using the internet requiring particular attention.

## Prevalence of doorstep sellers

The frequency of using doorstep sellers to access and switch energy deals has further increased since 2019. Half of those who switched electricity supplier did so through a doorstep seller, with almost one third saying that the main reason they switched was because they were sold to by a doorstep seller. Use of a doorstep seller to switch was particularly evident amongst domestic consumers who were not confident with using the internet.

The Utility Regulator may therefore wish to consider whether or not additional steps are needed to increase the awareness of potential issues of switching using doorstep sellers and the rights of the consumer in these circumstances. While signposting to relevant websites may be effective for those who have the confidence to search for this information, alternative methods would need to be considered for those who lack the confidence to use the internet, or who do not have access to the internet at all.

## Awareness of supplier obligations

Less than half of the respondents were aware of their supplier's obligations to them, with two thirds of those who are aware knowing how to go about making a complaint when these obligations have not been met. The Utility Regulator may therefore wish to consider how to ensure domestic consumers are aware of what the obligations are, and that they know the best procedure for making a complaint when these expectations have not been met.

## Engagement with younger consumers

There were several findings to suggest that younger consumers are less engaged with their energy suppliers. While there was a similar rate of not reading or only glancing at correspondence from suppliers across all age groups, those in the younger age group were more likely to say they either did not receive any correspondence or did not remember in what form they received it. Those in the youngest age group were also only behind the 65 plus age group in terms of the incidence of comparing electricity deals, switching electricity supplier and saying they were likely to switch; with those who had not switched being more likely to say they did not know that it was an option. Furthermore, younger respondents were the most likely age group to use a prepayment meter to pay for their electricity or gas, and so may be

missing out on potential direct debit discounts that would be available to them if they used a credit meter.

The Utility Regulator may therefore wish to consider liaising with energy companies to ensure that younger people are aware of the options and opportunities available to them as energy consumers. With almost all (98%) of 18- to 34-year-olds saying they have access to the internet while also being the most likely to be confident internet users (92%), the most efficient method of engagement would appear to be online.

## Engagement with older consumers to overcome inertia

Respondents in the 65 plus age group were both more likely to recall receiving correspondence and reading correspondence from their energy supplier, potentially contributing to the to greater levels of trust in their supplier to treat them fairly and provide a fair price. However, despite this, those aged 65 and over were less likely to know what their monthly expenditure on electricity was. Knowledge of the electricity and gas tariff they were on was also lowest for these respondents.

One particular area where engagement was low was in relation to switching. Older consumers were less likely to have compared electricity deals, while those who were aware that this was possible were less likely to agree that comparing deals gives them access to better prices. Incidences of switching electricity and gas supplier was lowest amongst the 65 and over group. Willingness to switch was also lowest amongst these respondents, with over half reporting being confident that they were on the best deal for them. This more hands-off approach to their energy deals may be limiting the opportunities for older consumers to access the best deal for them, and so the Utility Regulator may wish to review the ways in which energy companies are current engaging with those aged 65 and over.

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

There were several findings throughout the survey which suggest that domestic consumers who are either unable to access the internet or are not confident in using the internet could be excluded from accessing information on their energy. This was particularly evident with regards to comparing energy deals and switching. Those who did not have access to the internet were less likely to have compared their electricity deal, and those people who were not confident internet users were not as likely to find it easy to compare electricity deals. Similarly, switching energy supplier was less likely amongst those with no access to the internet and who are not confident internet users. Respondents who were not confident with using the internet were also more likely to find it difficult to contact their electricity supplier.

The struggles of those without internet access and who do not feel confident using the internet may give explanation to why consumers aged 65 and over demonstrate less engagement with certain areas of their energy deal. One third (32%) of respondents in the 65 plus age group indicated that they had no access to the internet, with two thirds (67%) saying they had access from their own home. Over half (53%) also described themselves as not being confident internet users.



## Passiveness in rural and deprived areas

Domestic consumers living in rural areas appear to be more static in their approach to energy. When compared to those respondents living in urban areas there were fewer incidences of recent switching, with half (50%) of rural consumers saying they switched electricity supplier in the last three years compared to three quarters (74%) of urban consumers. Rural customers were also less likely to have compared their energy deal and demonstrated lower willingness to switch in the future. However, domestic consumers in rural areas appear to be more engaged in energy when it comes to communication with their supplier. Rural consumers (88%) were more likely than urban consumers (82%) to be aware of what form correspondence from their electricity supplier comes in, and with post being the most common form there are opportunities for energy companies to engage with such customers.

Similarly, domestic consumers living in areas that fall under the first quintile of deprivation (most deprived) also demonstrated a passiveness in their approach. Such consumers were less likely to intend to switch their energy source in the next three years and expressed less willingness to pay anything extra on their bill to support investment. Of particular note is the low levels of awareness of the obligations of energy suppliers. With these consumers also less likely to know what form they receive correspondence from their electricity and gas suppliers, potentially due to the prevalence of prepayment meters in these areas, it is important for the Utility Regulator and energy companies to devise more effective ways of engaging with consumers in deprived areas.

## The experience of vulnerable consumers in the energy market

Consumers in the high and medium vulnerability categories tend to take a more proactive approach to their energy deal. They were more likely to have read correspondence they received from their supplier and were more likely to have queried a bill when making contact with their electricity supplier. Incidences of complaints were also highest amongst those in the high and medium vulnerability group. This more engaged approach may therefore have led to these consumers having greater confidence that they were on the best electricity deal for them, and as such were less likely to have switched supplier. However, one area for concern was the use of doorstep sellers amongst vulnerable consumers who had switched electricity supplier, with over half (55%) reporting using this method the last time they switched.

## Low awareness and usage of support services aimed at vulnerable consumers

There appears to be low awareness of the support available to vulnerable consumers, particularly amongst the target population for such support. Two thirds of those considered to be in the high or medium vulnerability group were not aware of the special services energy companies have in place to support those who are vulnerable. Similarly, almost all those who were of high or medium vulnerability were not signed up to NIE Networks Critical Care Register or their energy supplier's Customer Care Register. It may therefore be necessary to improve signposting and accessibility to these services to allow the target population to benefit from them. Strategies like these will need to take into account that consumers in the high and medium vulnerability groups are both less likely to have internet access (74% reported having access, compared to 97% in the low vulnerability group and 98% who are not vulnerable), and

more likely to not be confident internet users (43% stated this, compared to 3% and 9% of low and non-vulnerable consumers respectively).

## Greater engagement leads to more negative perceptions

Engagement when measured by switching behaviour appears to be linked to more negative views of energy suppliers. Domestic consumers who had switched their energy supplier in the last three years were more likely than non-switchers to say they did not trust their supplier to treat them fairly or to provide a fair price, and they were less likely to express satisfaction with the overall service from their supplier. One potential explanation for this is the greater understanding amongst switchers of the energy market and the options available. For example, almost three quarters (73%) of electricity switchers had reported comparing their electricity deal, compared to one quarter (25%) of non-switchers. Further research may therefore be required to explore the specific drivers behind satisfaction and trust.

## Engagement with customers on a prepayment meter

The findings suggest there are mixed levels of engagement amongst domestic consumers who have a prepayment meter for electricity or gas. Respondents with a prepayment meter were less likely to say they have received correspondence from their electricity supplier and were less likely to have read any correspondence they did receive compared to those not on a prepayment meter. This is to be expected since consumers with a prepayment meter are likely only receive an annual statement or notices around tariff increases rather than regular correspondence from their supplier. Gas customers using a prepayment meter were also less likely to have thought the information presented in the correspondence was clear and understandable, and were more likely to not want to switch because they were satisfied with their current service.

On the other hand, comparing electricity deals and switching electricity supplier was more likely amongst those with an electricity prepayment meter. Those on a prepayment meter were also more likely to have intentions to switch again. With prepayment meters now becoming the most common electricity payment method and with continued growth amongst gas households, and the finding that prepayment meter users were more likely to say they struggle to pay their energy bills, it is important for the Utility Regulator and energy companies to understand the behaviours of these consumers.

## Opportunity for awareness-raising around environmental protection and renewables

The COP26 summit in Glasgow took place during the interviewing period, but despite the increased media coverage of the summit and the promotion of the need for action on Climate Change, there was evidence to suggest that use of Low Carbon Technologies (LCTs) among domestic consumers is low. Only 7 of the 1514 respondents surveyed said that they used renewable sources or low carbon technologies to heat their home, while only 2% of all respondents were considering switching to this source. Only a third of respondents were willing to pay anything extra on their electricity (32%) and gas (33%) bills to support investment

in projects to protect the environment, although willingness to do this has increased from the 2019 tracker.

The Utility Regulator may therefore wish to explore ways to increase awareness of the opportunities available to domestic consumers to switch to more environmentally friendly energy sources. Further research may also be required to determine domestic consumer's willingness to support investment in projects to protect the environment and any potential barriers for not being willing.

# Appendix A - Detailed methodology

## Approach

Perceptive Insight undertook a statistically representative telephone 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 2021 with each interview taking, on average, 10 to 15 minutes to complete. Interviewing was carried out in compliance with the GDPR 2018 and the Market Research Society Code of Conduct. It should be noted that interviewing took place during the Covid-19 pandemic. This should be taken into consideration when the survey is repeated in the future.

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 Domestic Consumer Insight Tracker survey. 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 1 shows the current structure of domestic energy consumers in Northern Ireland from published government sources<sup>7</sup>.

Table A1: Demographics of NI domestic energy consumers

STRATIFICATION VARIABLE		PERCENTAGE IN NI POPULATION 18+
Age (HRP)	18 - 34	18%
	35 - 44	20%
	45 - 64	38%
	65 and over	25%
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 - 34	270
	35 - 44	300
	45 - 64	570
	65 and over	375
Gender	Male	735
	Female	765
SEG	ABC1	750
	C2DE	750
Urban/Rural	Urban	900
	Rural/Mixed	600
Total		100%

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

<sup>7</sup> Age, gender and urban/rural breakdown sourced from NISRA 2019 Mid-Year Population Estimates; SEG sourced from 2011 Census.

## Respondent demographics

The table below indicates the final survey responses achieved by age, gender, SEG and location.

STRATIFICATION VARIABLE		ACHIEVED NO.	ACHIEVED %
Age (HRP)	18 - 34	254	17%
	35 - 44	284	19%
	45 - 64	564	37%
	65 and over	373	25%
	Prefer not to say	39	3%
Gender	Male	748	49%
	Female	765	51%
	Other	1	0%
SEG	ABC1	725	48%
	C2DE	738	49%
	Prefer not to say	51	3%
Urban/Rural	Urban	912	60%
	Rural/Mixed	602	40%
Council	Antrim and Newtownabbey	113	7%
	Ards and North Down	133	9%
	Armagh City, Banbridge and Craigavon	165	11%
	Belfast	270	18%
	Causeway Coast and Glens	119	8%
	Derry City and Strabane	122	8%
	Fermanagh and Omagh	100	7%
	Lisburn and Castlereagh	124	8%
	Mid and East Antrim	109	7%
	Mid Ulster	121	8%
	Newry, Mourne and Down	138	9%
Multiple Deprivation Measure quintile	1 – Most deprived	283	19%
	2	272	18%
	3	321	21%
	4	335	22%
	5 – Least deprived	303	20%
<b>Total</b>		<b>1514</b>	<b>100%</b>

## 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	748	49%
Female	765	51%
Other	1	0%
<b>Total</b>	<b>1514</b>	<b>100%</b>

**Table B.2: Age**

Age		
Age	Count	Percentage
18-34	254	17%
35-44	284	19%
45-64	564	37%
65 plus	373	25%
Refused	39	3%
<b>Total</b>	<b>1514</b>	<b>100%</b>

**Table B.3: Tenure**

Tenure		
Tenure	Count	Percentage
Rent from a private landlord	149	10%
Rent from NI Housing Executive	128	8%
Rent from a housing association	47	3%
Own your home or buying through a mortgage	1167	77%
Refused	23	2%
<b>Total</b>	<b>1514</b>	<b>100%</b>



**Table B.4: Employment status**

Employment status		
Employment status	Count	Percentage
Working full time	660	44%
Working part time	185	12%
Unemployed	126	8%
Retired	430	28%
Student	36	2%
Other	63	4%
Refused	14	1%
<b>Total</b>	<b>1514</b>	<b>100%</b>

**Table B.5: Impact of coronavirus pandemic on employment status**

Impact of coronavirus pandemic on employment status		
Impact of coronavirus pandemic on employment status	Count	Percentage
Continued to work normal hours from home	178	18%
Continued to work normal hours rotating between home and workplace	44	5%
Employer reduced working hours	20	2%
Self employed and working hours reduced	52	5%
Furloughed and paid 80% of wages	111	11%
Furloughed but employer made up wages to 100%	25	3%
Lost job	22	2%
Hours increased	31	3%
No impact	388	40%
Other	36	4%
Refused	64	7%
<b>Total</b>	<b>971</b>	<b>100%</b>

**Table B.6: Means tested benefit**

Means tested benefit		
Means tested benefit	Count	Percentage
Yes	277	18%
No	1200	79%
Don't know	37	2%
<b>Total</b>	<b>1514</b>	<b>100%</b>

**Table B.7: Socioeconomic group**

Socioeconomic group		
SEG	Count	Percentage
AB	284	19%
C1	441	29%
C2	418	28%
DE	320	21%
Refused	51	3%
<b>Total</b>	<b>1514</b>	<b>100%</b>

**Table B.8: Internet access\***

Internet access		
Internet access	Count	Percentage
Access at home	1345	89%
Access outside of home	58	4%
Access using mobile data	116	8%
Do not have access	148	10%

\*Multiple choice question

**Table B.9: Method of accessing internet\***

Method of accessing internet		
Method of accessing internet	Count	Percentage
Home computer/laptop	910	67%
Tablet/ iPad	772	57%
Public work computer/ laptop	245	18%
Mobile/ smartphone	1098	80%
Home of friends or family	19	1%
Other	10	1%
Do not personally use internet	16	1%

\*Multiple choice question

**Table B.10: Confidence using the internet**

Confidence using the internet		
Confidence using the internet	Count	Percentage
1 – Not at all confident	213	14%
2	117	8%
3	233	15%
4	295	19%
5 – Very confident	656	43%
<b>Total</b>	<b>1514</b>	<b>100%</b>

**Table B.11: English as a first language**

English as a first language		
English as a first language	Count	Percentage
Yes, and speak no other languages	1388	92%
Yes, and speak one or more other languages	110	7%
No	16	1%
<b>Total</b>	<b>1514</b>	<b>100%</b>

**Table B.12: 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	91	6%
NVQ Level 1, Foundation GNVQ, Basic Skills	14	1%
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	163	11%
NVQ Level 2, Intermediate GNVQ, City and Guilds Craft, BTEC First / General Diploma, RSA Diploma	60	4%
Apprenticeship	32	2%
2+ A levels / VCEs, 4+ AS levels, Higher School Certificate, Progression / Advanced Diploma	162	11%
NVQ Level 3, Advanced GNVQ, City and Guilds Advanced Craft, ONC, OND, BTEC National, RSA Advanced Diploma	96	6%
Degree (for example BA, BSc), Higher degree (for example MA, PhD, PGCE)	333	22%
NVQ Level 4 - 5, HNC, HND, RSA Higher Diploma, BTEC Higher Level	66	4%
Professional qualifications (for example teaching, nursing, accountancy)	67	4%
Other vocational / work-related qualifications	42	3%
Foreign qualifications	15	1%
None of these	373	25%
<b>Total</b>	<b>1514</b>	<b>100%</b>

**Table B.13: Disability, illness and other factors\***

Disability, illness and other factors		
Disability, illness and other factors	Count	Percentage
Chronic/ serious illness	145	10%
Medically Dependent Equipment	26	2%
Oxygen use	17	1%
Physical impairment	64	4%
Unable to answer door	12	1%
Pensionable age	265	18%
Young children aged 5 or under	95	6%
Blind	3	0%
Partially sighted	14	1%
Hearing/ speech difficulties	26	2%
Unable to communicate in English	-	-
Dementia	10	1%
Developmental condition	19	1%
Mental health	65	4%
Temporary life change	9	1%
Caring for another member of family outside household	60	4%
None of the above	873	58%
Prefer not to say	48	3%
<b>Total</b>	<b>1514</b>	<b>100%</b>

\*Multiple choice question

**Table B.14: Number of people in household**

Number of people in household		
Number of people in household	Count	Percentage
Just me	292	19%
2	567	37%
3	253	17%
4	251	17%
5	109	7%
6+	42	3%
<b>Total</b>	<b>1514</b>	<b>100%</b>

**Table B.15: Children under 18 in household**

Children under 18 in household		
Children under 18 in household	Count	Percentage
None	1072	71%
1	151	10%
2	186	12%
3	72	5%
4	14	1%
5+	8	1%
Refused	11	1%
<b>Total</b>	<b>1514</b>	<b>100%</b>

Table B.16: Location

Location		
Location	Count	Percentage
Urban	912	60%
Rural	602	40%
<b>Total</b>	<b>1514</b>	<b>100%</b>

# 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 General Data Protection Regulation 2018 (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

**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 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 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

**ASK ALL**

**Code one only**

C10 How do you think the cost of electricity in NI compares to the Republic of Ireland? And how about Great Britain?

**NI is –**

Significantly more expensive
Slightly more expensive
Similar cost
Slightly cheaper
Significantly cheaper
Don't know

**Gas**

**Ask those who use mains gas at A1**

**Code one only**

C11 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**

C12 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**

C13 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**

C14 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**

C15 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**

C16 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

C17 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 those who use mains gas at A1

#### Code one only

C18 How do you think the cost of gas in NI compares to the Republic of Ireland? And how about Great Britain?

NI is –

Significantly more expensive
Slightly more expensive
Similar cost
Slightly cheaper
Significantly cheaper
Don't know

### ASK ALL

#### Select one only

C19 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 formal 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 formal 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 access Covid-19 support
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 access Covid-19 support
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
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
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**

G8 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

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**

<b>ASK ALL</b>	
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
<b>Credit customers – code 1 or 2 at B2</b>	
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
<b>Electricity PPM customers</b>
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**

H16 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**

G17 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

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

<b>ASK ALL</b>	
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
<b>Credit customers – code 1 or 2 at B7</b>	
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	
<b>Gas PPM customers</b>	
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 J2

#### 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

## 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 those who work or are unemployed at J2

#### Select one only

J3 What impact, if any, did the coronavirus pandemic have on your employment?

I continued to work my normal hours from home
I continued to work my normal hours rotating between home and my workplace
My employer reduced my working hours
I am self-employed and my working hours reduced
I was furloughed and paid 80% of my wages.
I was furloughed but my employer made up my wages to 100%.
I lost my job
My hours increased
No impact
Other
Prefer not to say

**ASK ALL**

**Select one only**

J4 Do you or anyone in your household receive a means tested benefits (other than Child Benefit)?

Yes
No
Don't know

**ASK ALL**

J5 What is the occupation of the chief income earner in your household?

**Open ended (to code SEG)**

**ASK ALL**

**Select all that apply**

J6 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 K6**

**Select all that apply**

J7 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**

J8 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**

J9 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**

J10 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**

J11 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
Temporary - life change for example post hospital recovery
Caring for another member of your family outside the household
None of the above
Prefer not to say

**ASK ALL**

**Code one only**

J12 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**

J13 How many children under the age of 18 live in your household?



**ASK ALL**

**Code one only**

J14 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