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Domestic Consumer Insight Tracker Survey

Report prepared for the Utility Regulator

March 2023

Utility Regulator
ELECTRICITY GAS WATER

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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 2022. 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 Trackers conducted in 2019 and 2021, and comparisons with those studies have been made throughout this report, where appropriate.

Methodology

A telephone methodology was used to conduct the surveys. In total, 1516 interviews were completed, which were representative of the household population in Northern Ireland. Interviewing took place during October 2022 and November 2022 with each interview taking, on average, 10 to 15 minutes to complete. Interviewing was carried out in compliance with UK GDPR and the Market Research Society Code of Conduct.

Key findings and recommendations

Heating types and current energy supplier

- Three in five (62%) use oil to heat their homes, followed by one third (34%) who have mains gas installed.
- 2% of domestic consumers have intentions to switch their home heating method in the next three years, with renewables or low carbon technologies (48%) being the most likely energy source these respondents would switch to.
- Almost all (99%) domestic consumers are aware of who their electricity supplier is, with Power NI (52%) and SSE (25%) being the more common suppliers. 98% of those with mains gas were able to recall who their gas supplier is, with 56% using SSE and 39% using Firmus.
- 37% had installed energy efficiency measures in their home within the last three years, with loft insulation (57%), cavity wall insulation (50%) and double glazing (26%) the most common measures implemented. Of those who had not installed any measures, 44% said that their home came with them installed already, followed by one quarter (25%) who had installed them more than three years ago.

Payment

- Over two in five (43%) have electricity bills of at least £100 per month, an increase from 13% in 2021. In terms of heating, almost half (48%) of gas consumers have a monthly spend of at least £100, compared to 9% who reported this in 2021.
- A prepayment meter was the most common method of paying for both electricity (43%) and gas (59%). Convenience was the most often cited reason for having one (73% of those with an electricity prepayment meter and 73% of those with a gas prepayment meter). The majority of electricity (98%) and gas (97%) consumers who use a prepayment meter indicated that they are content to remain using this method rather than change to alternative payments methods such as direct debit.
- 41% of electricity and 43% of gas customers reported that they do not know how the price of electricity or gas compares to other regions.
- Support has fallen for paying more on bills since 2021, with almost two thirds (63%, compared to 54% in 2021) of respondents stating that they would be unwilling to pay anything extra on their bill for future investment. One quarter would pay extra for projects to support the environment (24%, 32% in 2021) and to provide extra help for vulnerable customers (24%, 27% in 2021), while 13% would pay more to improve the reliability of the network (compared to 18% in 2021).

Interactions with energy suppliers

- Post was the most common method of receiving correspondence from both electricity (46%) and gas (58%) suppliers. 77% of electricity customers reported at least looking at the correspondence (either glancing at it or reading it in full), with 73% of those respondents saying they understood the information. Gas consumers were less likely to read or glance at the correspondence (70%), although 78% of those that did, agreed that the information was clear and understandable.
- Almost two thirds said they trust their electricity supplier to treat them fairly (63%), and just over half (52%) stated they trust their supplier to give them a fair price, with 19% and 23% respectively reporting that they distrust their electricity supplier in these regards. This compares to 10% of respondents in the 2021 Tracker who did not trust their electricity supplier to treat them fairly and 13% who do not trust them to provide a fair price. A similar pattern can be observed with gas customers not trusting their supplier to treat them fairly (25% distrust compared to 12% in 2021) and provide a fair price (31%, compared to 16% in 2021).
- Three quarters (74%) of domestic consumers reported satisfaction with their electricity supplier with 8% expressing dissatisfaction. 70% were satisfied with their gas supplier and 11% were dissatisfied. This represents a decrease in satisfaction since the 2021 Tracker, in which 87% and 83% were satisfied with the service provided by their electricity and gas supplier respectively.
- 11% contacted their electricity supplier in the last year. The most common reasons for this was switching their energy contract (23%), querying a bill (19%) and payment issues (16%). Of those that made contact, 64% found it easy to get in touch, 72% thought they were listened to, 69% felt they were treated fairly, and 67% said that their electricity supplier was supportive.

Complaint handling

- 4% of both electricity and 6% of gas consumers had made a complaint to their electricity or gas supplier in the past year.
- 5% stated that they had wanted to make a complaint to their electricity and 7% to their gas supplier in the past but left it unreported.

Switching

- There was a high level of awareness (96%) of being able to choose between different electricity suppliers amongst domestic consumers, with 68% of those consumers agreeing that having this choice gives access to better deals. Over half (54%) had compared electricity deals to see if they could switch supplier or tariff. This is up from 40% in the 2021 Tracker. Two in five (41%) of those who have the option to switch between gas suppliers said that they had compared gas deals. This is up from 33% in the 2021 study.
- 48% of electricity consumers and 40% of gas customers were confident that they are on the best energy deal for them.
- 44% of domestic consumers have switched their electricity supplier at least once, a decrease from 46% in the 2021 Tracker; of these, three quarters (72%) have done so within the last three years. In contrast, only 11% of those who have the option had switched gas suppliers.
- Feeling they were overpaying (54%) and reacting to an approach by a doorstep seller (26%) were the main drivers for switching electricity supplier. While these drivers are also evident in the 2021 Tracker, the incidence of reacting to an offer from a doorstep seller has decreased from 31% in 2021 to 26% in 2022.
- Almost half (48%) of electricity consumers who had switched did so through a doorstep seller.
- 80% of respondents agreed that they received the deal they were expecting when they switched electricity supplier, although 8% disagreed. 76% reported a positive and 5% a negative experience when they switched.
- Half (50%) said that they have never switched electricity supplier because they were happy with their current service. Satisfaction with the current service (48%) was also the main reason cited for not switching gas supplier. This is lower than the 2021 Tracker, in which 66% and 61% stated they were happy to remain with their current electricity and gas supplier respectively.
- 21% of both electricity and gas customers said they were likely to switch their supplier in the next 12 months.
- Internet access and confidence using the internet appears to influence the likelihood of comparing energy deals and of switching. Almost all (97%) of those with internet access were aware they could choose between electricity suppliers, while 59% of those who are confident internet users said they had compared electricity deals compared to 35% who are not confident. Half (47%) of those who have internet access had switched electricity supplier at least once in contrast to 16% of those without internet access.

Payment difficulties

- 56% of domestic electricity consumers and 59% of gas consumers reported that they are always able to keep up with their bills. This represents a notable decrease from 85% and 84% in the 2021 Tracker. The proportion of consumers who sometimes struggle to pay their bills has increased from 13% to 39% of electricity consumers and from 15% to 33% of gas consumers. The proportions who often or always struggle to pay their bills have also increased from 1% to 4% for electricity consumers and from 0% to 7% for gas consumers.
- 18% of respondents with a prepayment meter reported that they had run out of money on their meter and had gone without electricity over the past year, compared to 2% of those with a credit meter (i.e. those who pay by direct debit or on receipt of bill) who were unable to afford electricity. These figures are similar to those obtained in 2021, in which 18% with a prepayment meter had gone without electricity, compared to 1% with a credit meter.
- 11% and 10% reported that they have had to delay or go without other essentials so that they could pay for electricity and gas respectively. In the 2021 Tracker it was 4% for electricity and 3% for gas.
- 85% of respondents have reduced their electricity usage over the last year, while 6% had borrowed money to pay their electricity bills. This represents a large increase from the 2021 Tracker, in which 34% had reduced electricity usage and 2% had borrowed money. This was also true for gas customers, with 87% reducing their usage (compared to 28% in 2021) and 8% borrowing money to pay their bill (3% in 2021).

Consumer protections

- Half (51%) of domestic consumers are aware that energy suppliers have obligations to protect them.
- Two thirds (68%) 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

- Three in five (58%) domestic consumers were not aware of the special services offered by energy companies to consumers who are vulnerable or who require extra support.
- 2% 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.
- One fifth (18%) were aware of the services for vulnerable consumers that NI Water provides.

Conclusions and recommendations

Impact of rising energy costs

Since the last Domestic Tracker there have been steep increases in the price of energy[1]. The impact of these increases on consumers is shown in this current report. The proportion of respondents spending £100 or more per month on electricity has increased from 13% to 43% between 2021 and 2022, while 44% now spend at least £100 or more per month on their heating bill[2] compared to 12% in 2021.

While the majority of electricity (95%) and gas (92%) customers are able to keep on top of their energy bills, domestic consumers confirmed that they have made changes to their behaviour. 85% have reduced their electricity usage (compared to 34% in 2021) and 87% have reduced the amount of gas they use (compared to 28% in 2021). It should also be noted that a greater percentage indicated they sometimes struggle with their bill compared to the 2021 Tracker study; 39% said this in relation to their electricity bill compared to 13% in 2021, and 33% in relation to their gas bill compared to 15% in 2021.

The incidence of borrowing money to pay energy bills has also increased since 2021, while a greater percentage of consumers are now having to resort to going without or delaying buying essentials in order to pay for their energy. Since the previous Tracker, there has also been a further reduction in support amongst domestic consumers to pay extra on their bill for projects to protect the environment, for providing extra help for vulnerable consumers, and for improving the reliability of the network.

It may be the case that domestic consumers are not aware of any support services offered by their energy suppliers or other agencies that can help them cope with rising bills. Only 11% had contacted their electricity supplier in the last year, with the most common reasons for contact being related to their bill or contract. The Utility Regulator may therefore wish to examine how much support energy suppliers provide to their customers, and whether there are ways to increase awareness of the services available to customers who may be struggling with their energy bill.

Increased engagement but inertia with switching energy supplier

One potential impact of rising energy costs is that domestic customers are now more likely to engage with correspondence from their energy supplier. 56% and 54% had read the last written correspondence they received from their electricity and gas supplier respectively, compared to 41% and 40% in the 2021 Domestic Tracker. With regards to their energy contract and choice of suppliers, 83% of domestic consumers are now completely aware that they have a choice between electricity suppliers, compared to 72% in 2021. Over half (54%) of domestic consumers have also compared their electricity deal, an increase of 14 percentage points from 2021.

Despite this increased engagement there is still an inertia amongst domestic consumers to switch their electricity supplier, with the proportion of respondents who reported never

[1] https://www.bbc.co.uk/news/uk-northern-ireland-58558645
[2] This includes all heating sources.

switching their electricity supplier increasing slightly from 52% to 55%. Although contentment with their current service is the main driver for remaining with their supplier, there has been an increase in the percentage of respondents who are worried about the hassle of switching supplier. It may therefore be useful to provide domestic consumers with information on what the switching process entails and what sort of disruption, if any, they can expect.

Prevalence of doorstep sellers

While being approached by a doorstep seller has become less of a driver to switch energy supplier since the 2021 Tracker, the proportion of respondents who have switched via a doorstep seller has remained consistent, with almost half (48%, compared to 49% in 2021) using a doorstep seller to switch their electricity supplier.

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, with just under half (47%) being unaware of the obligations their suppliers have to protect consumers. 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

There has been an increase in the proportion of respondents who indicated they are completely aware of the obligations that energy companies have to protect their customers, with 35% reporting this compared to 25% in 2021. However, domestic consumers are still largely unaware of the obligations that energy suppliers have to protect their customers, with 47% not at all aware of these (49% in 2021). One quarter (28%) are also unaware of how to make a complaint when these obligations have not been met – the same result as observed in 2021. 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.

Younger customers struggling more with rising costs

Findings from the survey suggest that younger respondents were more likely to spend more on their electricity and gas bills than their older counterparts. 40% of consumers aged 18 to 34 spend more than £100 per month on their electricity bill, compared to 30% of those aged 65 and over. These increased costs have had several impacts on younger consumers as demonstrated throughout this report. Compared to domestic consumers aged 65 and over, those aged 18 to 34 were more likely: to distrust their supplier to treat them fairly and provide a fair price; to say they struggle to pay their electricity bill; to have delayed or put off getting essentials to afford their electricity; to have reduced their electricity and gas usage; and to have borrowed money to pay their electricity bill.

With younger consumers appearing to struggle more, there is evidence to suggest they take a more proactive approach to ensuring they are on the best deal for them. Those aged 18 to 34 were also more likely: to be aware they can compare electricity deals and agree that doing

so gives access to better deals; to have compared their electricity deal and found this easy to do so; and to have switched their electricity supplier within the last three years. However, it is still important for energy suppliers to ensure their younger customers are fully aware of their current deal, with those aged 18 to 34 more likely to report never receiving any correspondence from their electricity or gas supplier.

Older consumers not as affected by rising costs

As found in the 2021 Tracker, older domestic consumers showed less engagement with their energy supplier and deal. While they were more likely to know in which form they receive correspondence from their energy supplier, they were less likely to agree that they understood the information in the correspondence. They were also less likely to report having compared their energy deal and subsequently switching energy supplier, and were less likely to be aware of how electricity and gas prices in NI compare to other regions.

One possible explanation for this low engagement is that domestic consumers aged 65 and over have not struggled as much with rising costs. Indeed, only 30% of older consumers reported spending at least £100 per month on their electricity bill, and were not as likely to struggle to pay their electricity bills or take measures to reduce their energy costs (although over three quarters have had to reduce their electricity usage). Incidence of making complaints to their energy supplier were also lowest amongst this age group. With older domestic consumers more likely to be happy with their current service, their inertia is not surprising, but it is still an area that needs to be looked at closely.

Passiveness in rural areas

Rural domestic consumers have continued to have a more static approach to their energy contract, with 30% reporting that they had switched their electricity supplier and 20% of those who had switched doing so within the past year. This compares to 52% of urban customers who have switched and 31% that have done so in the past year. This could be explained by rural customers showing less interest in comparing electricity deals, or by them being less aware that they have a choice of suppliers. However, an alternative explanation could be found when looking at the ways in which domestic consumers switch their supplier. Half (51%) of urban respondents who had switched had done so through a doorstep seller, compared to 37% of rural respondents. Rural consumers could therefore be less aware of their options as they do not receive as many (or any) direct approaches to switch their supplier.

Most deprived areas have trust in their suppliers, but are more likely to show signs of struggling

Although there is little difference in the amount spent on electricity and heating between those living in the first (most deprived) and fifth (least deprived) quintiles of deprivation, there is evidence to suggest that those living in deprived areas are struggling more. While respondents living in the first quintile were more likely to trust their electricity supplier to provide a fair price, they were also more likely to indicate that they sometimes struggle to pay their bills. These consumers are also more likely to have borrowed money to pay for their electricity and gas bills. It is therefore important that these customers are fully aware of their supplier's obligations towards them, and so the Utility Regulator and energy suppliers may wish to explore ways in

which they can improve knowledge of these obligations amongst consumers living in the most deprived areas.

Low awareness and usage of support services aimed at vulnerable consumers

While the 2022 Tracker exhibited increased awareness of support services for vulnerable customers, uptake of these services remains low amongst those who could potentially avail of them, despite there being no evidence that vulnerable customers are less likely to be aware of the services. Only 9 of the 38 respondents, who are dependent or live with someone who is medically dependent on electricity, had signed up for NIE Networks' Critical Care Register (inferences should not be drawn from this finding alone due to the low base), while 98% of those in the high and medium vulnerability group were not signed up to their supplier's Customer Care Register.

The 2022 Tracker also examined awareness and uptake of NI Water's support services, but awareness of this was again low, with 81% of those identified as having some level of vulnerability reporting they were unaware.

As vulnerable domestic consumers were amongst the most likely respondents to report going without or delaying the purchase of essentials, it is important that they are fully aware of any support services that are available to them to help alleviate any energy pressures they face. Vulnerable customers remain less likely to be internet users or to be confident internet users, and so the Utility Regulator should consider alternative methods of increasing awareness. With regards to any future Tracker surveys, it may be useful to signpost respondents to relevant organisations that can help them with accessing support services, such as by providing telephone contact numbers.

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

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

The lower engagement amongst older domestic consumers may also be explained by their tendency to not use the internet or not be confident internet users. Over one quarter (27%) of those aged 65 and older indicated they do not have any access to the internet, while 46% reported being not confident as an internet user. Along with those who would be considered vulnerable, deprivation was also an indicator of digital inclusion. 11% of those living in the

most deprived areas do not have internet access, while 19% did not think of themselves as confident internet users. This compares to 5% of those in the least deprived areas who do not have internet access and 10% who are not confident internet users. It is therefore important for energy suppliers to ensure that those consumers who are digitally excluded are kept fully informed of their energy deal and of any possibilities to improve on it.

Impact of self-disconnection[3] on trust and overall satisfaction with energy supplier

18% of domestic customers with a prepayment meter and 2% with a credit meter had gone without electricity at least once over the past year. This appears to have impacted the trust these customers place in their energy supplier. One third (32%) of those who had gone without electricity did not trust their supplier to treat them fairly, while 39% did not trust them to provide a fair price. This has also impacted on overall satisfaction, with one fifth (20%) of those who had been self-disconnected from their supply reporting dissatisfaction with their energy supplier.

In addition to this, 31% of domestic consumers who had experienced self-disconnection were not confident they were on the best electricity deal. These negative perceptions may therefore explain why such respondents were more likely to have switched their electricity supplier. Two thirds (66%) of those who had experienced self-disconnection had switched their supplier at least once, compared to 42% who had not experienced self-disconnection from their electricity supply. This further emphasises the need for domestic consumers to be aware of how to compare energy deals and determine which deal works best for their current circumstances.

Engagement with customers on a prepayment meter

The prevalence of prepayment meters in domestic consumers homes has continued to increase from the previous tracker. 43% now have a prepayment meter for electricity compared to 39% in 2021, while three in five (59%) have a gas prepayment meter, compared to 57% in 2021. The results from the 2022 Domestic Tracker exhibit similar trends between those with a prepayment meter and those with a credit meter with regards to their respective engagement with their energy contracts. Those who have a prepayment meter for electricity or gas were more likely to be unaware of what form they receive their correspondence in and more likely to say they have not received any correspondence. This is to be expected since consumers with a prepayment meter are likely only to receive an annual statement or notices around tariff increases rather than regular correspondence from their supplier. In contrast, respondents with a prepayment meter were more likely than those who have a credit meter to have compared their deals and to have then switched their electricity or gas suppliers.

Domestic consumers with a prepayment meter for gas also now appear to be more affected by rising costs. Over one third (35%) of customers with a prepayment meter for gas spend in excess of £100 on their heating bill per month, compared to 7%[4] from the 2021 Tracker. Those

[3] Self-disconnection refers to respondents who have gone without electricity or gas because the cost was too high or because they had ran out of credit on their prepayment meter.
[4] Table 5.2 of 2021 Domestic Consumer Insight Tracker Report. Report can be accessed at https://www.uregni.gov.uk/files/uregni/documents/2022-03/niaur-domestic-tracker-written-report-28feb22.pdf

who have a prepayment meter were also more likely to suggest that they struggle to pay their electricity or gas bill, and were more likely than those with a credit meter to have borrowed money to pay their bills. These difficulties may explain why customers on a prepayment meter are more likely to be 'switchers' as they are more encouraged to find the best deal. Nevertheless, with prepayment customers more likely to be unaware of energy supplier's consumer protection obligations it is important for them to be fully aware of the details of their current contract.

Low uptake of renewable energy sources

The COP27 summit in Egypt took place during the interviewing period, but much of the media coverage leading up to the event was focussed on the rising cost of living across the UK. This type of uncertainty may have resulted in an unwillingness for domestic consumers to switch or consider switching to renewable energy sources. Fewer than 10 respondents currently use renewable energy to heat their home, while 3% of all respondents indicated they would be willing to switch to renewables.

However, the findings suggest customers are willing to incorporate energy efficiency measures into their homes. When considering those respondents who reported they moved into a home with such measures already installed or had installed them more than three years ago, almost four in five (78%) domestic consumers have energy efficiency measures integrated into their home.

As mentioned previously, domestic consumers were concerned about the disruption associated with switching energy supplier which may also be the case when switching energy source. Further research into the specific reasons for consumers unwillingness to switch to renewables may therefore be required in order to devise methods to alleviate concerns.

2. Introduction

Background

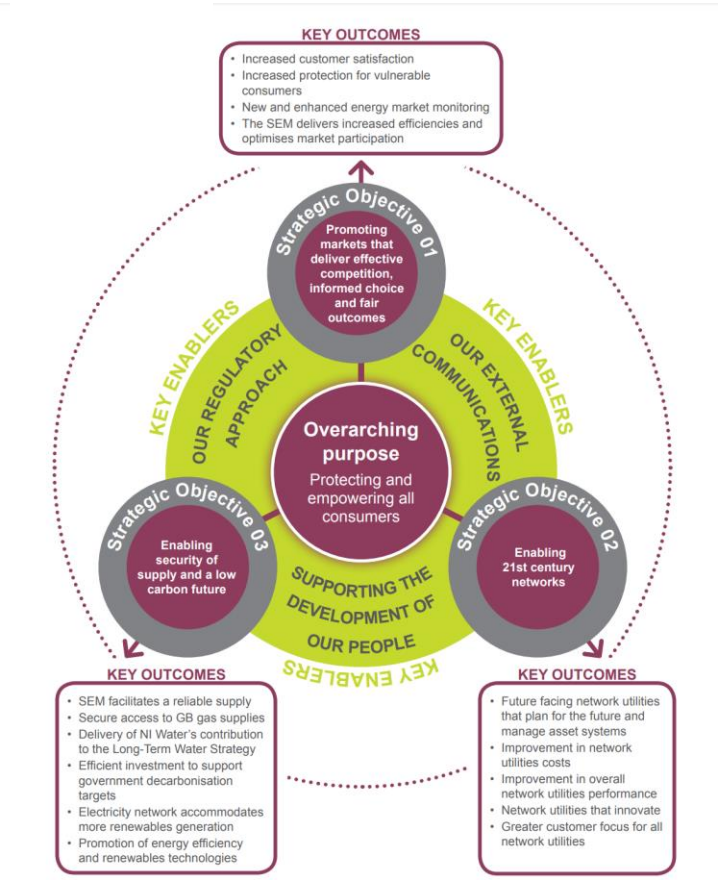
The Utility Regulator is the independent non-ministerial government department responsible for regulating Northern Ireland's electricity, gas, water and sewerage industries. The Utility Regulator works to deliver a number of key statutory objects including, to protect the short and long-term interests 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 2022, 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 2021 and 2019 baseline tracker surveys.

This is a follow-up survey to the 2019 and 2021 Domestic Trackers. Comparisons between the results obtained in this survey have been compared with those from 2019 and 2021 where appropriate. While interviewing for the 2021 and 2022 Domestic Trackers were carried out by telephone, 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

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

The report concludes by highlighting areas for further consideration and with possible implications for the Utility Regulator Corporate Strategy.

3. Methodology

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

Approach

Perceptive Insight undertook a statistically representative survey of domestic energy consumers in Northern Ireland using a telephone interviewing methodology. Interviewing took place during October 2022 and November 2022, with each interview taking, on average, 15 to 20 minutes to complete. Interviewing was carried out in compliance with the UK GDPR 2018 and the Market Research Society Code of Conduct.

Questionnaire design

The questionnaire was designed in collaboration with the Utility Regulator project team and was initially based on the 2019 tracker questionnaire. 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)[5] we assigned each respondent, based on their postcode, to one of five quintiles of deprivation. Again this was monitored throughout project implementation to ensure good representation alongside other factors including location by local council and housing tenure.

Definitions

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

Socioeconomic group

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

Switchers

Respondents were asked whether they had switched their energy supplier and, if so, when was the last time they had switched. The Consumer Council of NI considers domestic consumers to be 'sticky' if they have not switched suppliers within the last three years and so may require more encouragement to switch in the future[6]. For the purpose of this report, respondents that are referred to as 'switchers' have switched their energy supplier in the last three years, while 'non-switchers' are those who have either never switched or have not switched in the last 3 years. These criteria were also used in the 2021 and 2019 Domestic Trackers, 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 are unable to answer the door;
- *Low vulnerability* – includes consumers with children aged under 5; who are unable to communicate in English; and those who have caring responsibilities for another member of their family.

For the purpose of this report, those respondents in the 'high' and 'medium' vulnerability category are grouped together, while those in the 'low' vulnerability group and those with no

[5] https://www.nisra.gov.uk/statistics/deprivation/northern-ireland-multiple-deprivation-measure-2017-nimdm2017

[6] 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

vulnerabilities will be considered separately. This approach replicates that taken for the 2019 and 2021 Domestic Trackers.

Respondent demographics

Age, gender, SEG and location

The table below indicates the final survey responses achieved by age, gender, socio-economic group and location.[7]

STRATIFICATION VARIABLE		ACHIEVED NO.	ACHIEVED %
Age (HRP)	18 - 34	257	17%
	35 - 44	317	21%
	45 - 64	548	36%
	65 and over	376	25%
	Prefer not to say	18	1%
Gender	Male	736	49%
	Female	780	51%
SEG[8]	ABC1	743	49%
	C2DE	747	49%
	Prefer not to say	26	2%
Urban/Rural	Urban	966	64%
	Rural/Mixed	550	36%
Council	Antrim and Newtownabbey	137	9%
	Ards and North Down	143	9%
	Armagh City, Banbridge and Craigavon	166	11%
	Belfast	257	17%
	Causeway Coast and Glens	116	8%
	Derry City and Strabane	132	9%
	Fermanagh and Omagh	75	5%
	Lisburn and Castlereagh	123	8%
	Mid and East Antrim	109	7%
	Mid Ulster	132	9%
	Newry, Mourne and Down	126	8%
Multiple Deprivation Measure quintile	1 – Most deprived	287	19%
	2	297	20%
	3	310	20%
	4	315	21%
	5 – Least deprived	307	20%
Total		1516	100%

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

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

4. Heating types and current energy supplier

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

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

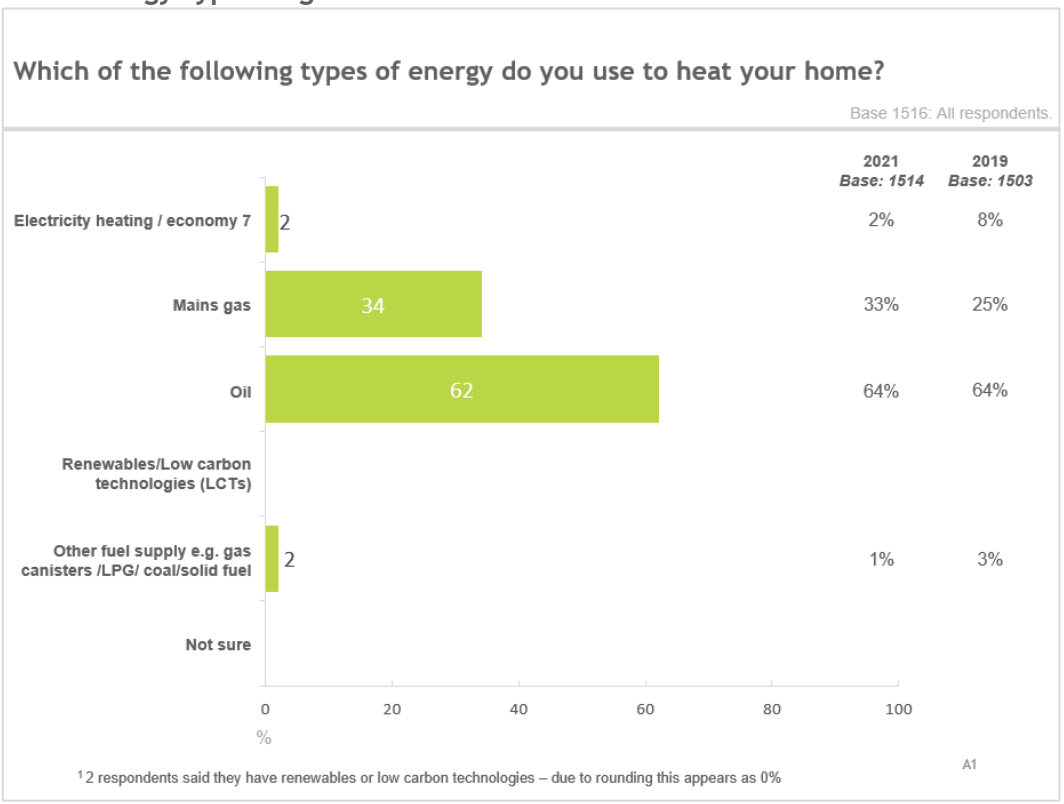
Key findings

- Three in five (62%) use oil to heat their homes, followed by one third (34%) who have mains gas installed.
- 2% of domestic consumers have intentions to switch their home heating method in the next three years, with renewables or low carbon technologies (48%) being the most likely energy source these respondents would switch to.
- Almost all (99%) domestic consumers are aware of who their electricity supplier is, with Power NI (52%) and SSE (25%) being the more common suppliers. 98% of those with mains gas were able to recall who their gas supplier is, with 56% using SSE and 39% using Firmus.
- 37% had installed energy efficiency measures in their home within the last three years, with loft insulation (57%), cavity wall insulation (50%) and double glazing (26%) the most common measures implemented. Of those who had not installed any measures, 44% said that their home came with them installed already, followed by one quarter (25%) who had installed them more than three years ago.

Type of energy used to heat the household

The following charts provide a breakdown of respondents by the type of energy used to heat their household. The source of energy most likely to be used was oil with 62% of respondents confirming that they have this in their home. A further third (34%) reported that they had mains gas, a slight increase from 33% in 2021.

Figure 4.1 Energy type usage



Mains gas use

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

Figure 4.2 Mains gas usage by gender, age and SEG

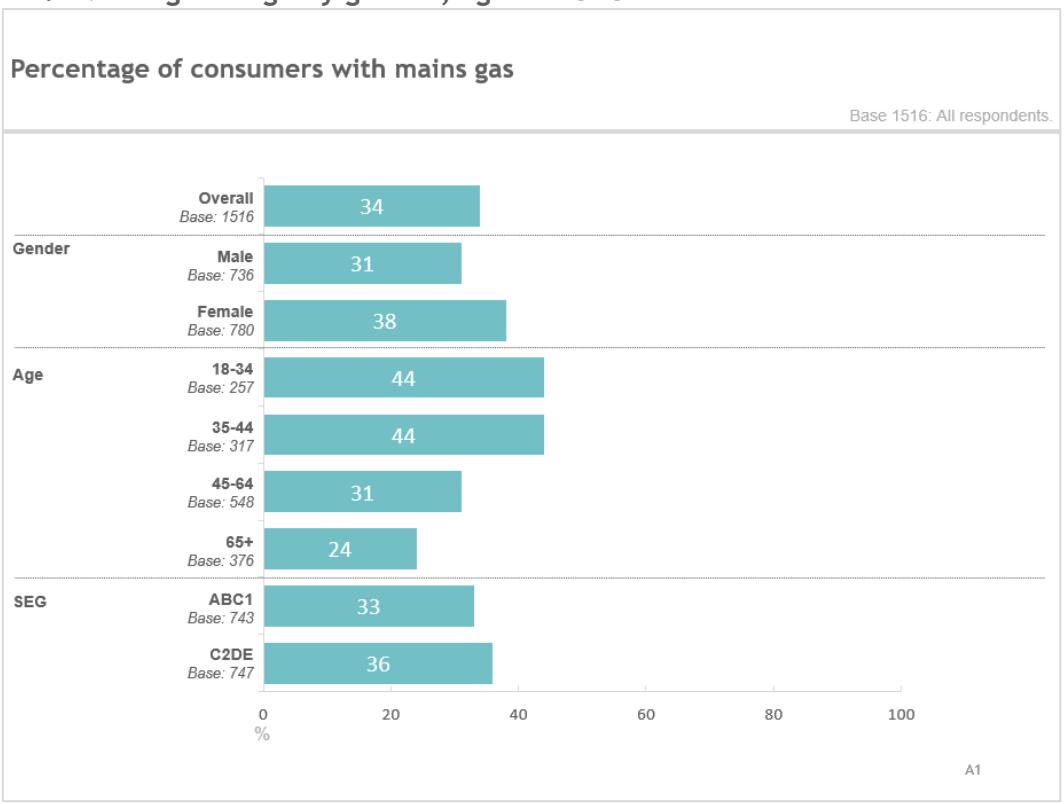
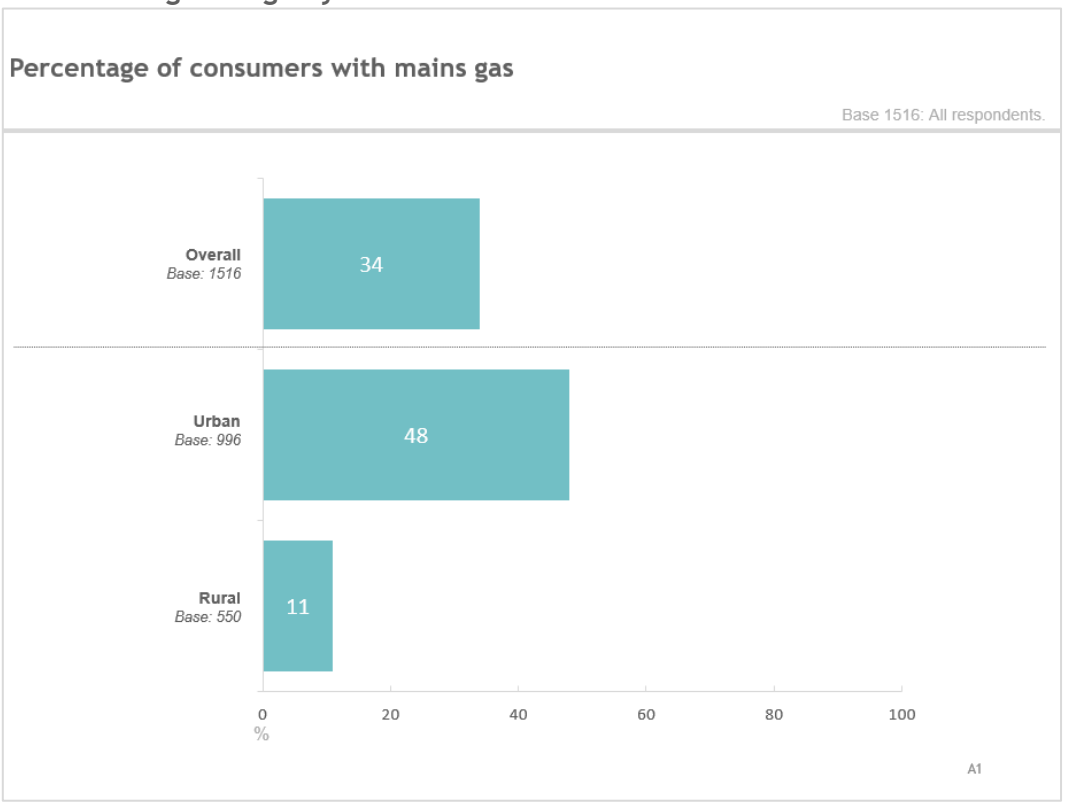


Figure 4.3 Mains gas usage by location



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

- Those aged 65 and over (72%) were more likely to have oil heating than those aged 18 to 34 (54%);
- Respondents who own their home (67%) were more likely to have oil than those who privately rent (56%) and those in social housing (35%). In contrast, those living in social housing (61%) were more likely to have gas than those who privately rent (40%) or own their home (30%);
- 84% of rural respondents had oil, compared to half (50%) of urban respondents; and
- Consumers who were not vulnerable (38%) were more likely to have gas heating than those considered to be of high or medium vulnerability (28%), who were more likely to have oil heating (68%, compared to 52% of low vulnerability and 59% who were not vulnerable).

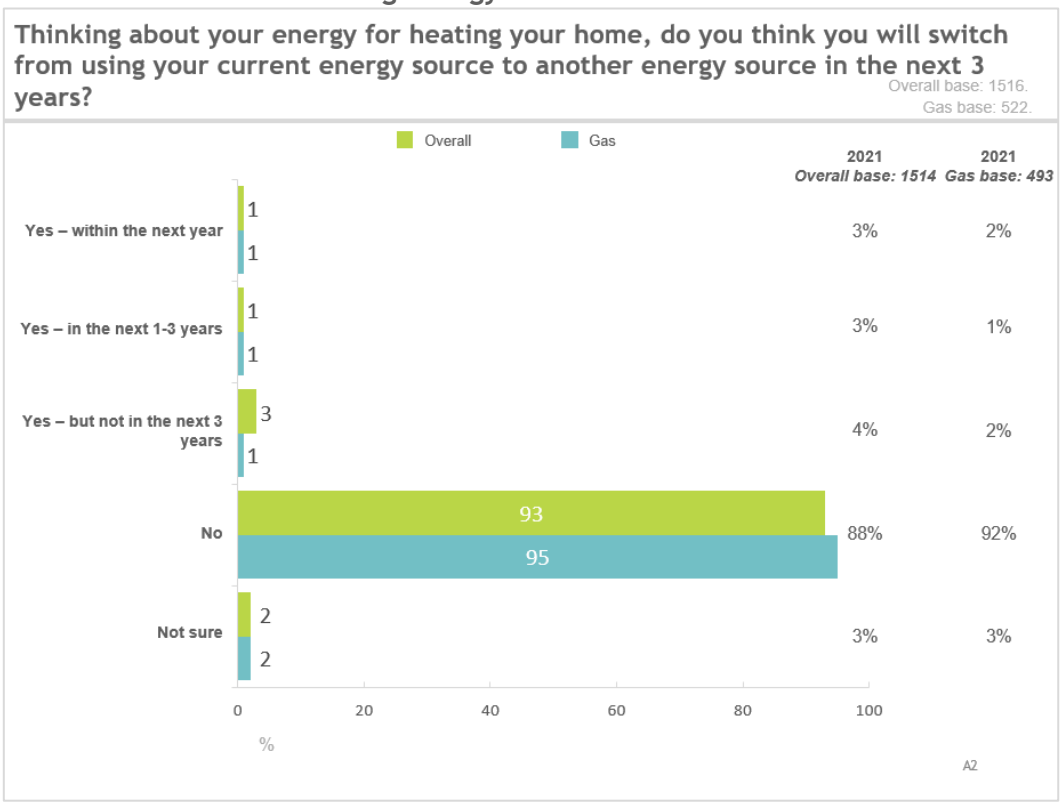
Table 4.1 Fuel source by demographics, location, deprivation, tenure and vulnerability

		Electricity heating	Mains gas	Oil	Renewables / LCTs	Other	*Total*
Overall	All *Base: 1516*	2%	34%	62%	0%	2%	*100%*
Age	Under 35 *Base:257*	1%	44%	54%	-	1%	*100%*
	35-44 *Base:317*	2%	44%	51%	1%	2%	*100%*
	45-64 *Base:548*	1%	31%	66%	-	2%	*100%*
	65 plus *Base: 376*	2%	24%	72%	-	1%	*100%*
Location	Urban *Base: 966*	2%	48%	50%	-	1%	*100%*
	Rural *Base: 550*	1%	11%	84%	0%	3%	*100%*
MDM Quintile	1 - Most deprived *Base: 287*	3%	51%	45%	-	1%	*100%*
	2 *Base: 297*	1%	27%	70%	-	2%	*100%*
	3 *Base: 310*	2%	22%	74%	-	3%	*100%*
	4 *Base: 315*	1%	26%	71%	1%	1%	*100%*
	5 - Least deprived *Base: 307*	1%	48%	50%	-	2%	*100%*
Tenure	Owner occupied *Base: 1180*	1%	30%	67%	0%	2%	*100%*
	Private rented *Base: 163*	2%	40%	56%	-	2%	*100%*
	Social rented *Base: 160*	3%	61%	35%	-	1%	*100%*
Vulnerability	High/medium vulnerability *Base: 610*	2%	28%	68%	-	1%	*100%*
	Low vulnerability *Base: 109*	1%	41%	52%	1%	5%	*100%*
	Not vulnerable *Base: 797*	1%	38%	59%	0%	1%	*100%*

Intentions to switch energy type

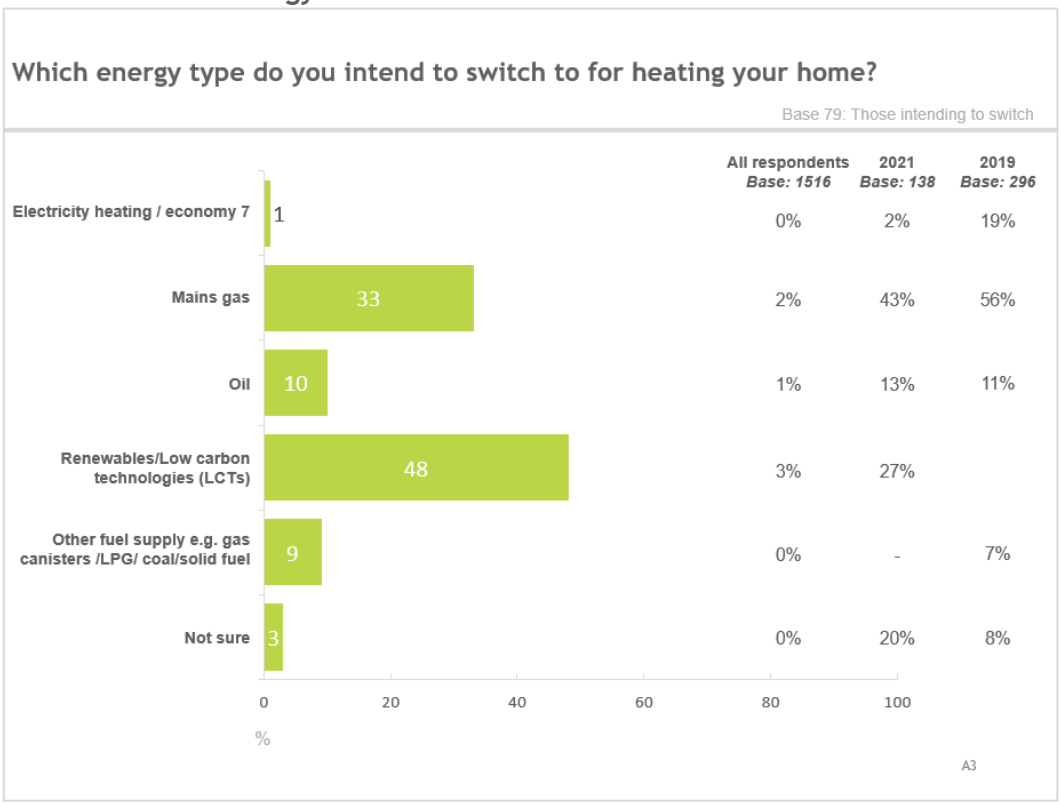
When considering the type of energy used to heat their home, 2% (down from 6% in 2021) of electricity customers and 2% (down from 3% in 2021) of gas customers said that they were thinking about switching their current energy source within the next three years. A further 3% of electricity and 1% of gas consumers expected to switch in over three years-time (see Figure 4.4).

Figure 4.4 Likelihood of switching energy source



Of those who said they intend to switch their energy source, renewables or low carbon technologies (48%) were the most preferred sources, followed by mains gas (33%). 3% were unsure which energy source they would like to switch to, although it should be noted that this has fallen from 20% in 2021 (see Figure 4.5).

Figure 4.5 Preferred energy source to switch to

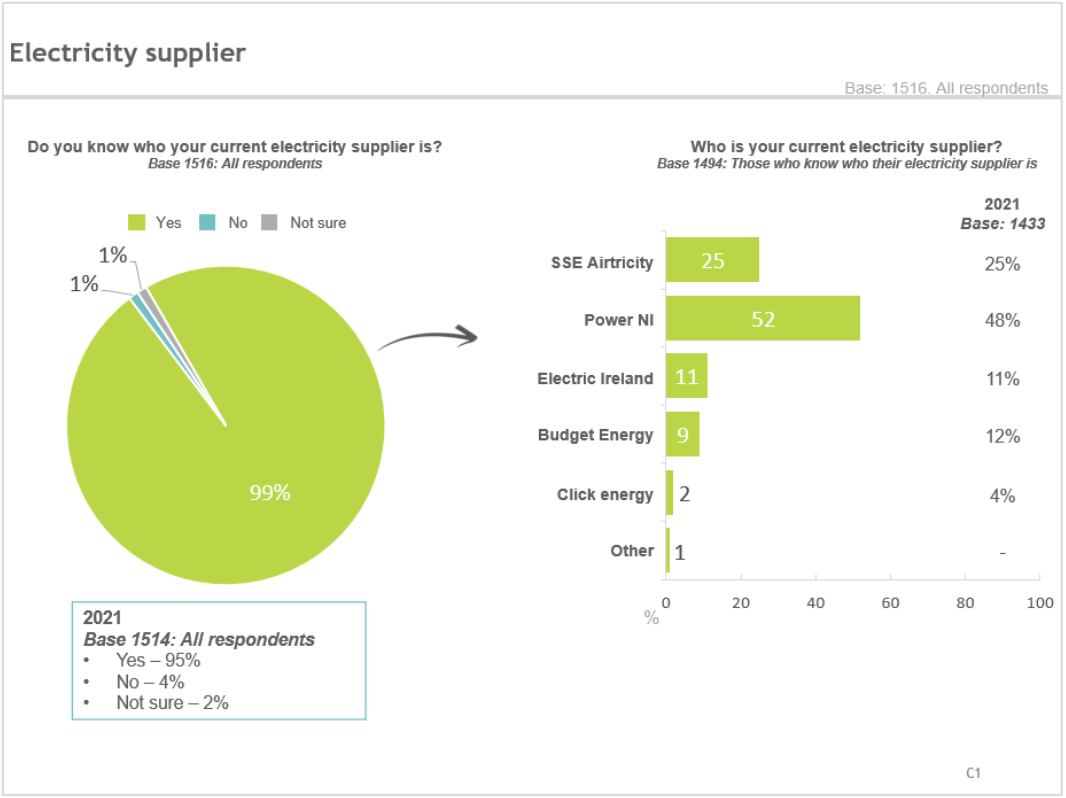


Energy supplier

Electricity supplier

The vast majority (99%) were aware of who their electricity supplier was. The most common electricity supplier was Power NI at 52%, followed by SSE Airtricity at 25% (see Figure 4.6).

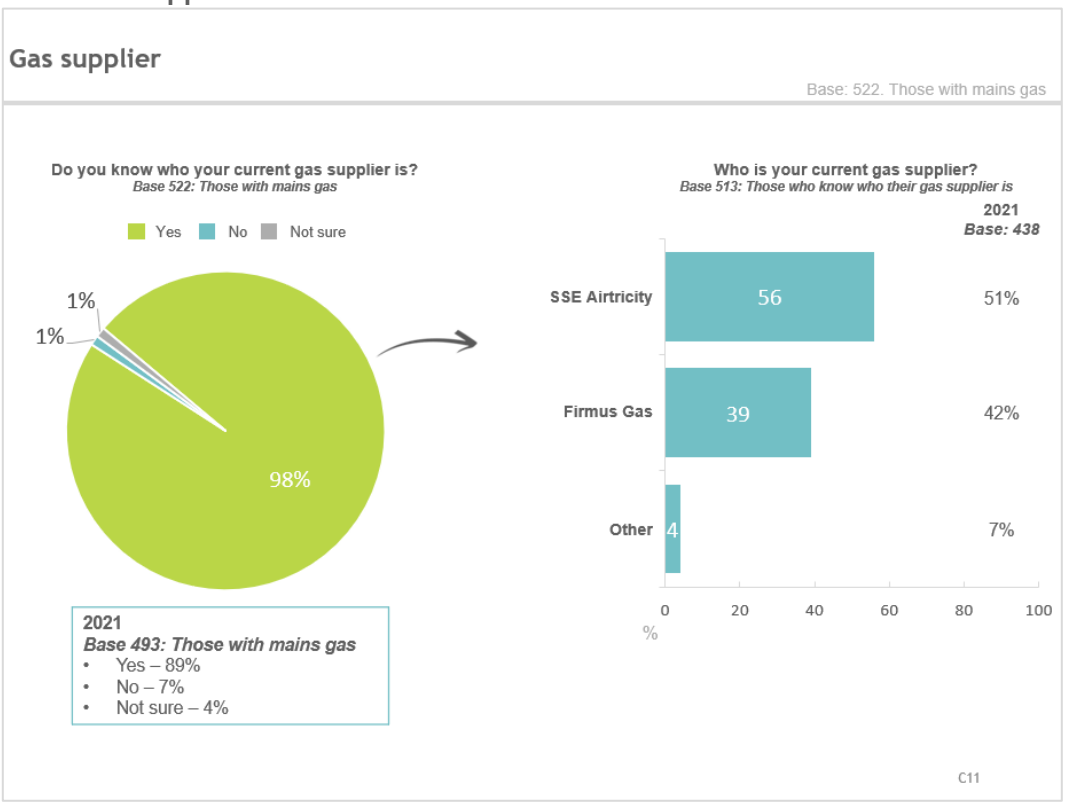
Figure 4.6 Electricity supplier



Gas supplier

Of those who were aware of their gas supplier (98%), SSE Airtricity was the most common at 56% followed by Firmus Gas at 39%. 3% believed that Phoenix Gas was still their supplier and 1% cited other suppliers (see Figure 4.7).

Figure 4.7 Gas supplier



Energy efficiency measures

Respondents were asked whether they had put any energy efficiency measures in place in their home in the last three years (see Figure 4.8).

37% of domestic consumers have installed energy efficiency measures in their homes in the last three years, with loft insulation (57%), cavity wall insulation (50%), and double glazing windows (26%) the most common measures. Those who had not switched their electricity supplier in the last three years (39%) and who had not self-disconnected from their gas or electricity supply (39%) were more likely to have installed energy efficiency measures when compared with those who had switched (32%) and who had self-disconnected from their supply (20%). Four in five (40%) respondents who owned their home confirmed they had put measures in place, in comparison to one quarter of those living in social housing (27%) and who privately rent (26%), while those who would not be considered vulnerable (41%) were more likely to have installed energy efficiency measures than those in the high or medium vulnerability group (32%) (see table 4.2).

Figure 4.8 Energy efficiency measures

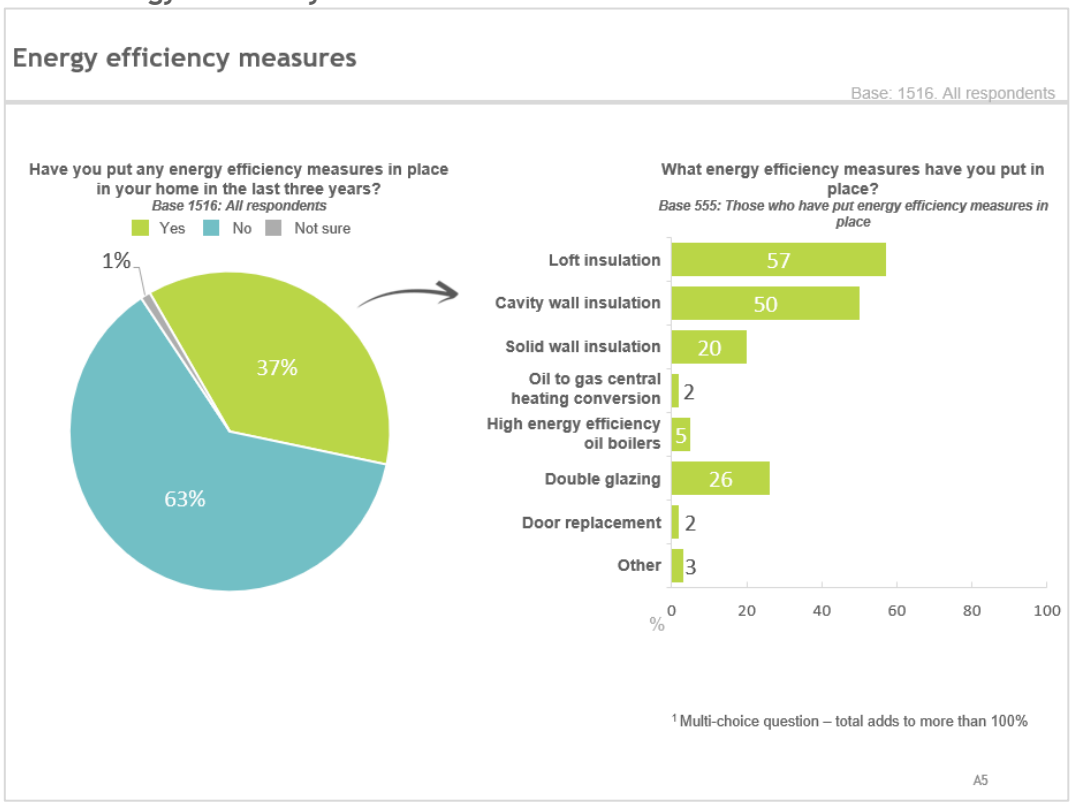
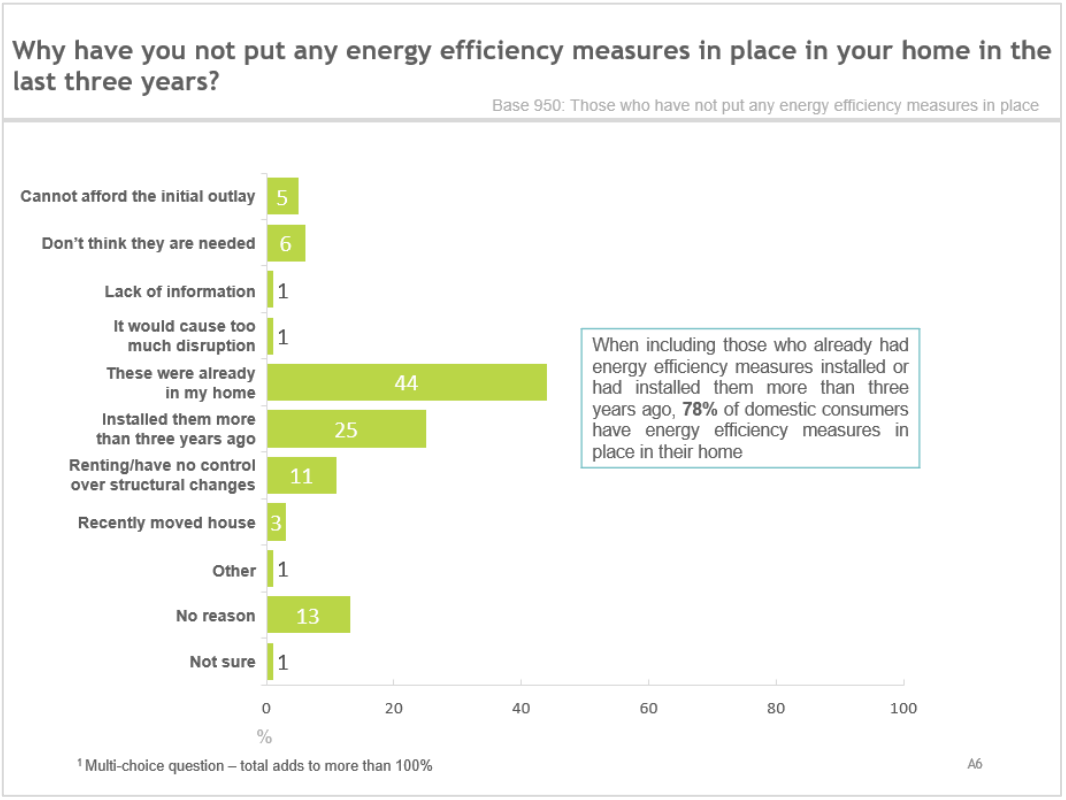


Table 4.2 Energy efficiency measures by tenure, self-disconnection, electricity switching and vulnerability

		Yes	No	Not sure	*Total*
Overall	All *Base: 1516*	37%	63%	1%	*100%*
Tenure	Owner occupied *Base: 1180*	40%	60%	0%	*100%*
	Private rented *Base: 163*	26%	71%	3%	*100%*
	Social rented *Base: 160*	27%	73%	-	*100%*
Self-disconnection	Yes *Base: 156*	20%	79%	1%	*100%*
	No *Base: 1354*	39%	61%	0%	*100%*
Electricity switching	Switchers *Base: 478*	32%	68%	0%	*100%*
	Non-switchers *Base: 1038*	39%	60%	1%	*100%*
Vulnerability	High/medium vulnerability *Base: 610*	32%	67%	1%	*100%*
	Low vulnerability *Base: 109*	35%	65%	-	*100%*
	Not vulnerable *Base: 797*	41%	59%	1%	*100%*

Those who had not put any measures in place were asked for their reasons for not doing so. 44% said that there were already measures in place when they moved into their home, while one quarter (25%) had measures installed more than three years ago. 11% mentioned they had no control over structural changes to their home, and 6% did not think they needed to put any measures in place (see Figure 4.9).

Figure 4.9 Reasons for not installing energy efficiency measures



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

5. Payment

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

- Spending on electricity and gas;
- Payment methods and tariff types;
- Reasons for using a prepayment meter for electricity or gas;
- Cost of electricity in Northern Ireland compared to GB and ROI; and
- Paying extra on bill.

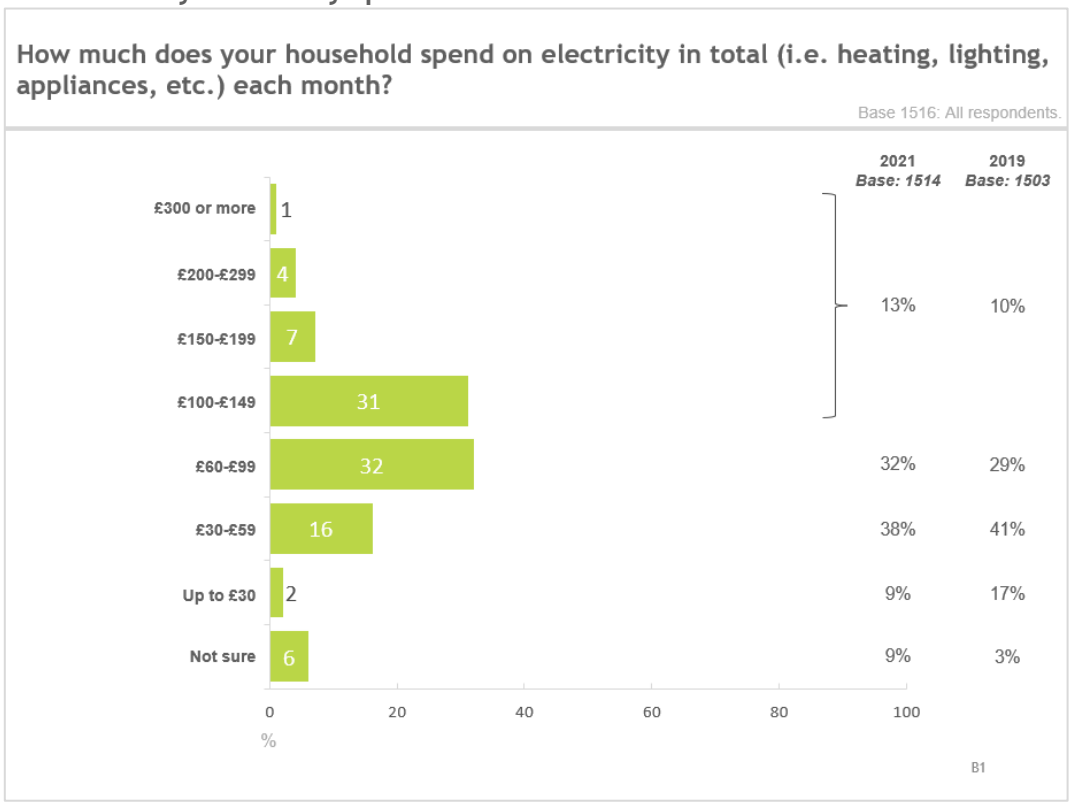
Key findings

- Over two in five (43%) have electricity bills of at least £100 per month, an increase from 13% in 2021. In terms of heating, almost half (48%) of gas consumers have a monthly spend of at least £100, compared to 9% who reported this in 2021.
- A prepayment meter was the most common method of paying for both electricity (43%) and gas (59%). Convenience was the most often cited reason for having one (73% of those with an electricity prepayment meter and 73% of those with a gas prepayment meter). The majority of electricity (98%) and gas (97%) consumers who use a prepayment meter indicated that they are content to remain using this method rather than change to alternative payments methods such as direct debit.
- 41% of electricity and 43% of gas customers reported that they do not know how the price of electricity or gas compares to other regions.
- Support has fallen for paying more on bills since 2021, with almost two thirds (63%, compared to 54% in 2021) of respondents stating that they would be unwilling to pay anything extra on their bill for future investment. One quarter would pay extra for projects to support the environment (24%, 32% in 2021) and to provide extra help for vulnerable customers (24%, 27% in 2021), while 13% would pay more to improve the reliability of the network (compared to 18% in 2021).

Spend on electricity and heating

Respondents were asked what was their monthly household spend on electricity was (see figure 5.1). 2% reported that they spend up to £30, with 16% saying it was between £30 and £59. Respondents were most likely to spend between £60 and £99 (32%) and £100-£149 (31%), while 12% said that they spend at least £150 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):

- 46% of respondents who have a prepayment meter for electricity spend at least £100 per month on their bill, compared to 40% of those with a credit meter;
- Those aged 65 or over were least likely to spend £100 or more on electricity (30%, compared to 40% of those aged 18 to 30, 55% of those aged 35 to 44, and 46% of those aged 45 to 64);
- Respondents who had children (58%) were more likely than those without children (35%) to spend over £100 per month; and
- 64% of those who have self-disconnected from their electricity supply spend £100 or more on electricity per month, compared to 40% of those who have not self-disconnected from their electricity supply.

Table 5.1 Monthly electricity spend by demographics, electricity self-disconnection and children

		Up to £30	£30-£59	£60-£99	£100-£149	£150-£199	£200-£299	£300 or more	Don't know	*Total*
Overall	All *Base: 1516*	2%	16%	32%	31%	7%	4%	1%	6%	*100%*
Age	Under 35 *Base:257*	3%	21%	33%	30%	6%	3%	1%	2%	*100%*
	35-44 *Base: 317*	2%	13%	27%	39%	9%	5%	2%	4%	*100%*
	45-64 *Base: 548*	2%	13%	34%	32%	8%	5%	1%	5%	*100%*
	65 plus *Base: 376*	4%	20%	35%	22%	4%	3%	1%	12%	*100%*
Electricity self-disconnection	Yes *Base: 138*	1%	10%	25%	37%	13%	12%	2%	1%	*100%*
	No *Base: 1372*	3%	17%	33%	30%	6%	3%	1%	6%	*100%*
Electricity payment method	Prepayment meter *Base: 647*	2%	18%	31%	33%	8%	4%	1%	3%	*100%*
	Credit meter *Base: 869*	3%	15%	34%	29%	6%	4%	1%	8%	*100%*
Children	Children *Base: 546*	1%	9%	29%	40%	11%	5%	2%	3%	*100%*
	No children *Base: 963*	3%	20%	34%	26%	4%	4%	1%	7%	*100%*

This represents a large increase from the 2021 Domestic Tracker in the number of consumers spending at least £100 on their electricity bill, from 13% in 2021 to 43% in 2022, while 2% now spend up to £30 compared to 9% 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 (89%) were more likely than those who use other means to heat their home (78%) to know how much their monthly spend was. The mode spend was between £100 and £149 for both gas users (26%) and those who used other means (27%). Overall, 44% reported spending £100 or more per month on heating, with 48% of gas users reporting this.

Figure 5.2 Monthly spend on heating

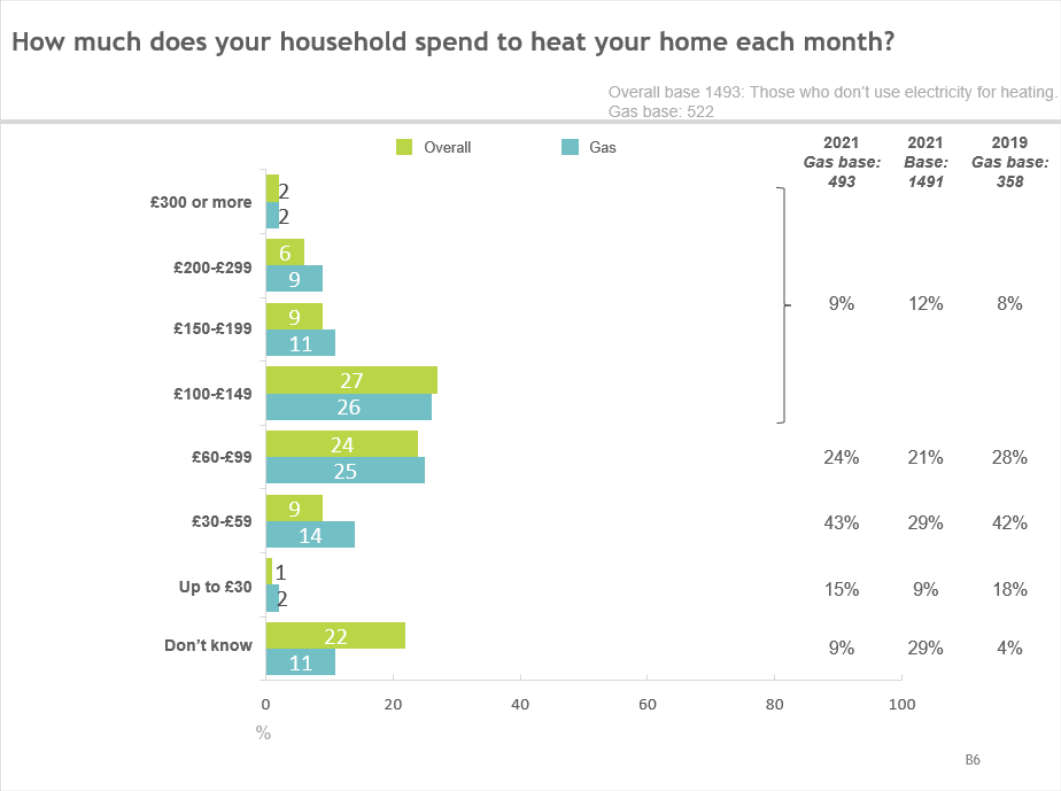


Table 5.2 Monthly spend on heating by method of payment

		Up to £30	£30-£59	£60-£99	£100-£149	£150-£199	£200-£299	£300 or more	Don't know	*Total*
Overall	All *Base: 1493*	1%	9%	24%	27%	9%	6%	2%	22%	*100%*
Gas heating	Gas *Base: 522*	2%	14%	25%	26%	11%	9%	2%	11%	*100%*
Gas payment method	Prepayment meter *Base: 310*	2%	17%	28%	27%	12%	4%	1%	10%	*100%*
	Credit meter *Base: 212*	2%	10%	21%	24%	9%	16%	5%	12%	*100%*
Oil heating	Oil *Base: 945*	1%	7%	24%	28%	8%	4%	1%	27%	*100%*

Monthly spend on gas heating has also increased from the 2021 study, with 48% spending at least £100 compared to 9% in 2021. Heating prices have also increased, with almost half (44%) spending £100 or more, compared to 12% in 2021 (see Figure 5.2).

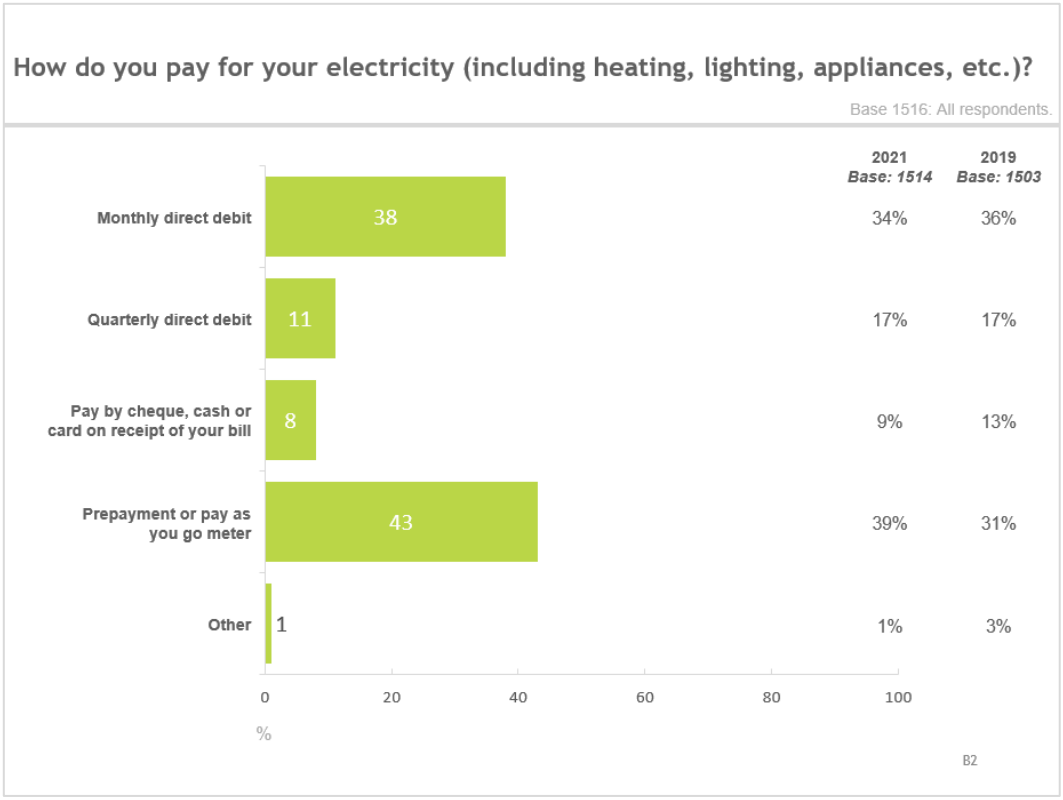
Energy payment methods and tariff types

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 (43%) to pay for their electricity. In relation to credit meters, one third (38%) pay by monthly direct debit. 11% have a quarterly direct debit, while 8% 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 (60%) were more likely to have an electricity prepayment meter than those aged 65 and over (22%). Respondents in the oldest age group (65 plus) were most likely to pay using cheque, cash or card (18%), therefore missing out on direct debit discounts;
- Respondents living in urban areas (48%) were more likely to have a prepayment meter than those living in rural areas (34%) who were more likely to pay using cheque, cash or card (12%, compared to 5% in urban areas);
- Those living in the most deprived areas (60%) were more likely to use a prepayment meter than those in the least deprived areas (33%). Monthly direct debit was the most popular method of payment for those living in the least deprived areas (50%, compared to 26% of those in the first quintile (most deprived));
- Domestic consumers living in social housing (81%) and who privately rent (77%) were more likely to use a prepayment meter than those who own their home (33%);

- 24% of those who do not have access to the internet pay using cheque, cash or card, with 6% of those who do have access paying using this method; and
- Electricity customers with a prepayment meter were more likely to have switched supplier (48%) than customers with a credit meter.

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

		Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment meter	Other	*Total*
Overall	All *Base: 1516*	38%	11%	8%	43%	1%	*100%*
Age	Under 35 *Base:257*	29%	9%	2%	60%	1%	*100%*
	35-44 *Base: 317*	33%	9%	3%	55%	0%	*100%*
	45-64 *Base:548*	38%	11%	7%	43%	1%	*100%*
	65 plus *Base: 376*	45%	15%	18%	22%	1%	*100%*
Location	Urban *Base:966*	37%	9%	5%	48%	0%	*100%*
	Rural *Base:550*	38%	14%	12%	34%	2%	*100%*
MDM Quintile	1 - Most deprived *Base: 287*	26%	6%	7%	60%	1%	*100%*
	2 *Base: 297*	29%	13%	7%	49%	1%	*100%*
	3 *Base: 310*	40%	11%	9%	38%	1%	*100%*
	4 *Base: 315*	42%	14%	10%	34%	0%	*100%*
	5 - Least deprived *Base: 307*	50%	11%	6%	33%	1%	*100%*
Tenure	Own home *Base: 1180*	45%	13%	9%	33%	1%	*100%*
	Private renting *Base: 163*	15%	5%	3%	77%	1%	*100%*
	Social housing *Base: 160*	8%	6%	5%	81%	-	*100%*
Internet access	Yes *Base: 1377*	39%	10%	6%	44%	1%	*100%*
	No *Base: 139*	27%	18%	24%	29%	1%	*100%*
Electricity switching	Switchers *Base: 478*	40%	9%	3%	48%	0%	*100%*
	Non-switchers *Base: 1038*	37%	12%	10%	40%	1%	*100%*

Three quarters (76%) reported that they were on their supplier's standard variable tariff, followed by 9% who were on a promotional tariff. 15% were unsure what tariff they were on for electricity, with this more likely to be the case for those aged 65 and over (18%, compared to 10% of 18 to 34 year olds). Respondents who had switched their electricity supplier in the last three years were more likely to be on a promotional tariff (19%) compared to non-switchers (4%).

Figure 5.4 Electricity tariff

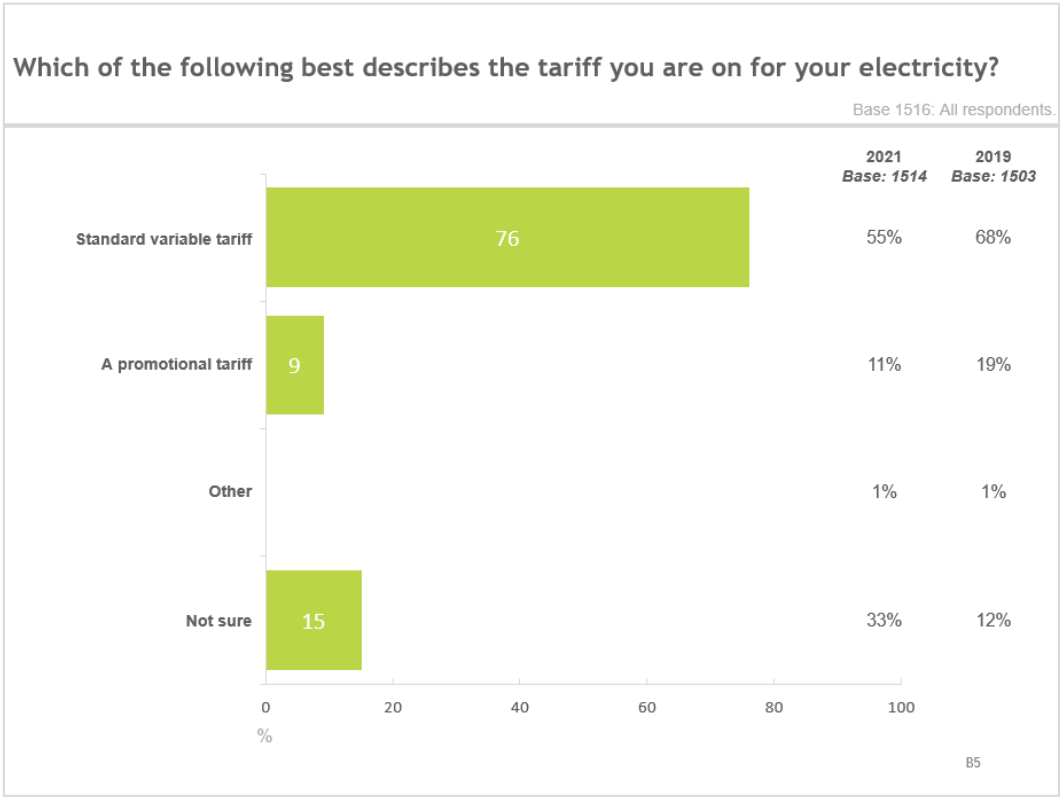


Table 5.4 Electricity tariff by demographics and switching

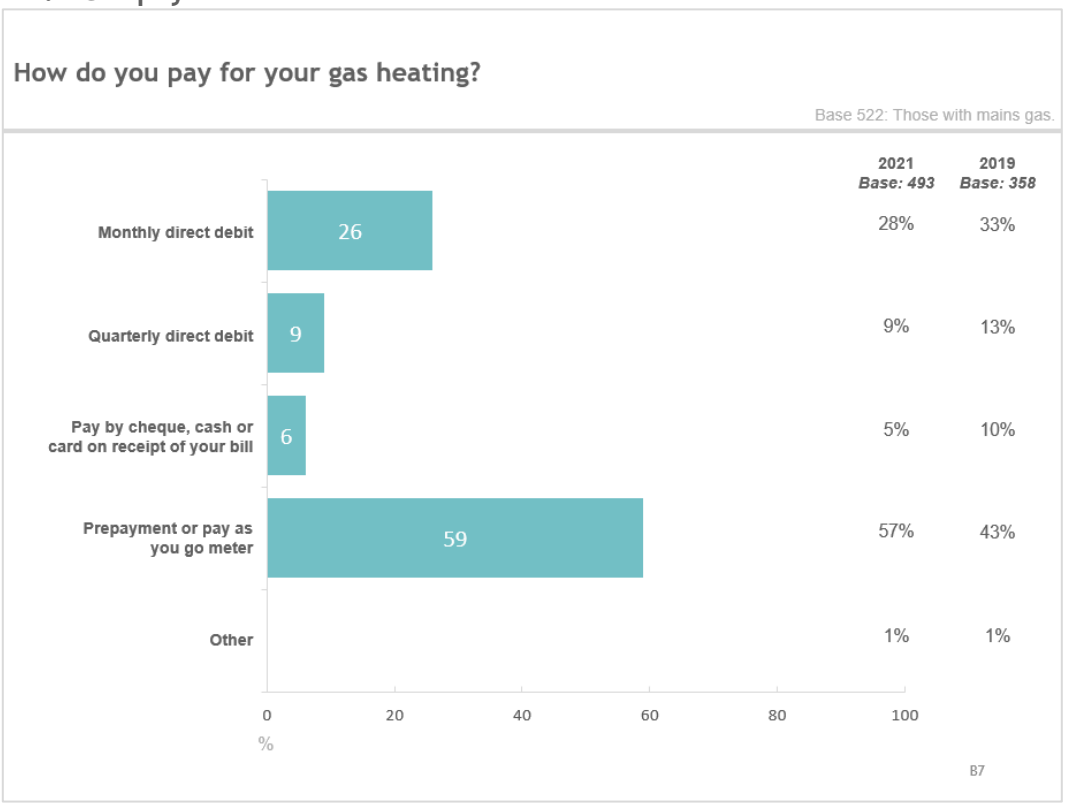
		Standard variable tariff	Promotional tariff	Other	Don't know	*Total*
Overall	All *Base: 1516*	76%	9%	0%	15%	*100%*
Age	Under 35 *Base:257*	77%	12%	0%	10%	*100%*
	35-44 *Base:317*	77%	8%	-	15%	*100%*
	45-64 *Base:548*	75%	10%	1%	15%	*100%*
	65 plus *Base: 376*	77%	5%	1%	18%	*100%*
Electricity switching	Switchers *Base: 478*	66%	19%	0%	14%	*100%*
	Non-switchers *Base: 1038*	80%	4%	0%	15%	*100%*

Prepayment meters have remained the most common method of paying for electricity, with their prevalence increasing from 39% in 2021 to 43%. The use of monthly direct debit has also increased (38%, from 34% in 2021), while the use of quarterly direct debit has fallen (11%, compared to 17% in 2021) (see Figure 5.3). More households are now also reporting being on their electricity supplier's standard variable tariff (76%, compared to 55% in 2021). It should also be noted that the number of respondents who were unsure of the tariff they were on has decreased from one third (33%) in 2021 to 15% (see Figure 5.4).

Gas

Prepayment meters were also the most common method of paying for gas heating, with 59% of respondents saying they use one to pay for their gas. This was followed by one quarter (26%) 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):

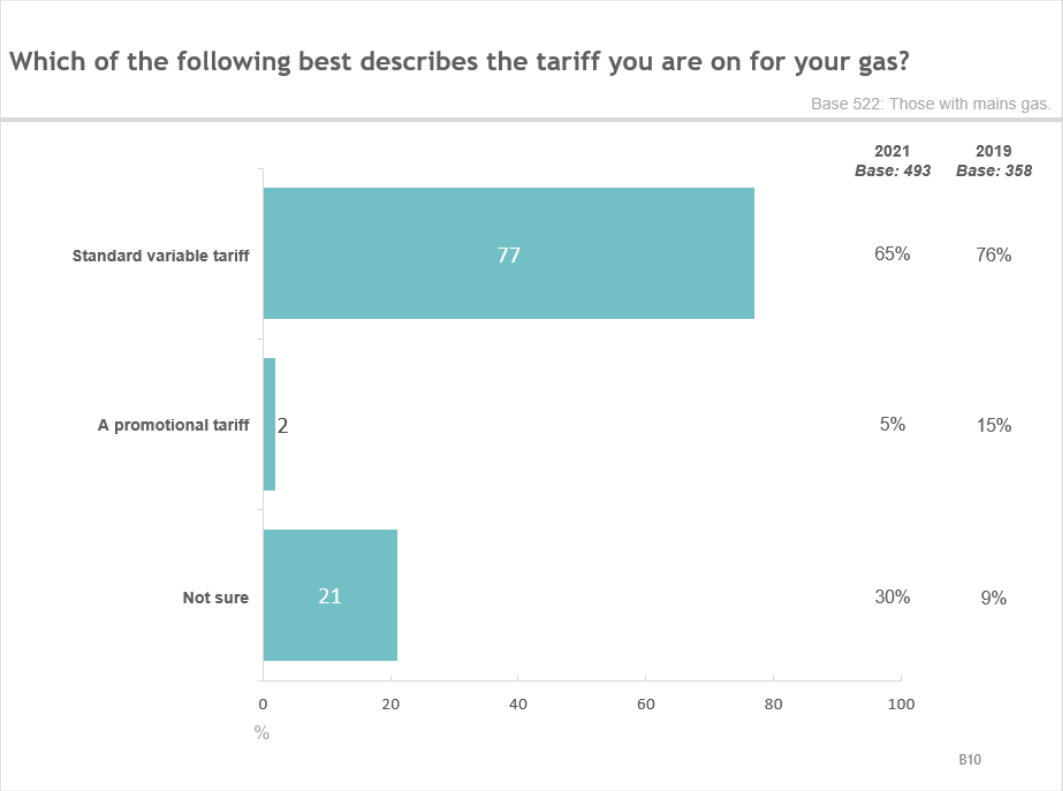
- 71% of 18 to 34 year olds have a prepayment meter for gas, compared to 37% of those aged 65 plus. In contrast, older respondents (43%) were more likely to be on a monthly direct debit than younger respondents (17%);
- Gas prepayment meters were more common in the most deprived areas (81%) than in the least deprived (40%); and
- Those living in social housing (90%) were more likely to have a prepayment meter than those who own their home (47%).

Table 5.5 Gas payment method by demographics, deprivation and tenure

		Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment meter	*Total*
Overall	All *Base: 522*	26%	9%	6%	59%	*100%*
Age	Under 35 *Base:112*	17%	10%	2%	71%	*100%*
	35-44 *Base: 140*	20%	11%	4%	65%	*100%*
	45-64 *Base: 171*	26%	7%	7%	60%	*100%*
	65 plus *Base: 92*	43%	10%	10%	37%	*100%*
MDM Quintile	1 - Most deprived *Base: 145*	12%	4%	3%	81%	*100%*
	2 *Base: 81*	17%	7%	5%	70%	*100%*
	3 *Base: 68*	25%	10%	7%	57%	*100%*
	4 *Base: 82*	37%	9%	9%	46%	*100%*
	5 - Least deprived *Base: 146*	38%	16%	5%	40%	*100%*
Tenure	Own home *Base: 354*	33%	13%	7%	47%	*100%*
	Private renting *Base: 65*	14%	3%	3%	80%	*100%*
	Social housing *Base: 98*	6%	1%	3%	90%	*100%*

Three quarters (77%) of households with gas heating reported that they were on a standard variable tariff with their supplier, with 2% being on a promotional tariff. However, one fifth (21%) were unsure what tariff they were on (see Figure 5.6).

Figure 5.6 Gas tariff



The number of respondents who are unsure of which gas tariff they are on has decreased from just under a third (30%) in 2021, to one fifth (21%) in 2022. However, it should be noted that awareness of tariffs is still low when compared with the 2019 Tracker (9% unsure) (see Figure 5.6).

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 two in five (38%) said that it was to help their household budget energy costs. 15% mentioned that the property came with a prepayment meter already installed. Those aged 45 and 64 (49%) were more likely to say that having a prepayment meter helps them budget their energy costs than those aged between 18 and 34 (21%), who were more likely to mention that their property came with one (20%, compared to 11% aged 45 to 64). However, convenience was the most common reason for having a prepayment meter across all age groups (see Table 5.6).

Figure 5.7 Reasons for having a prepayment meter for electricity

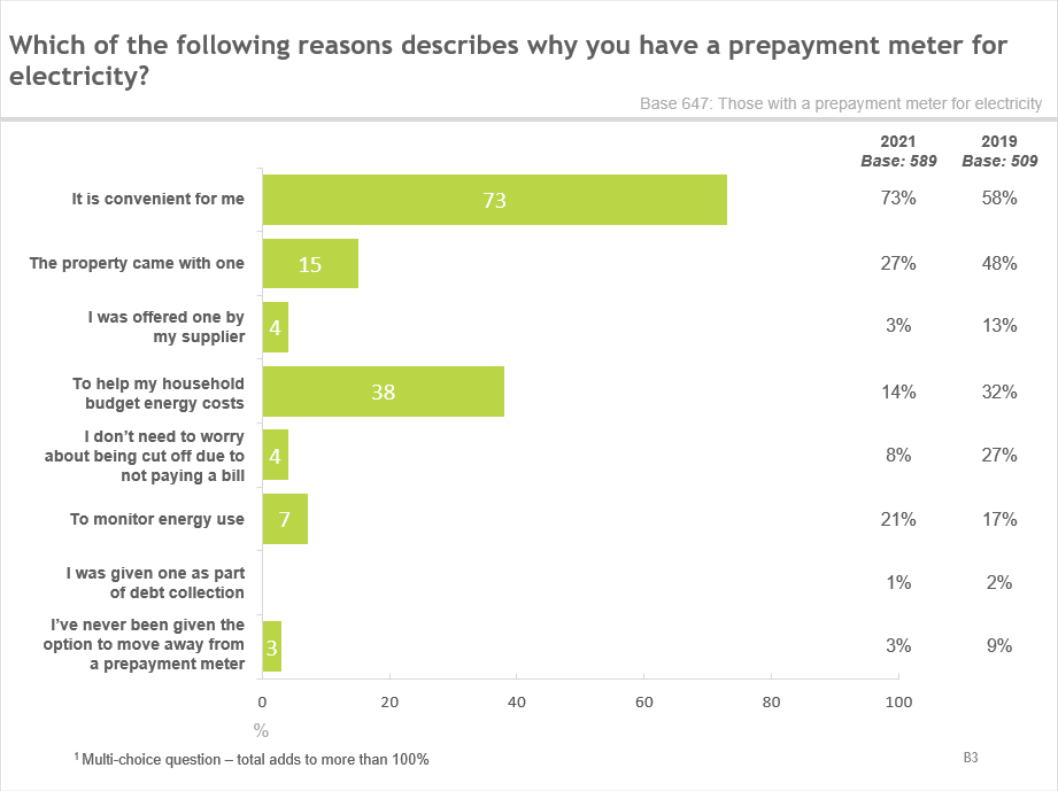
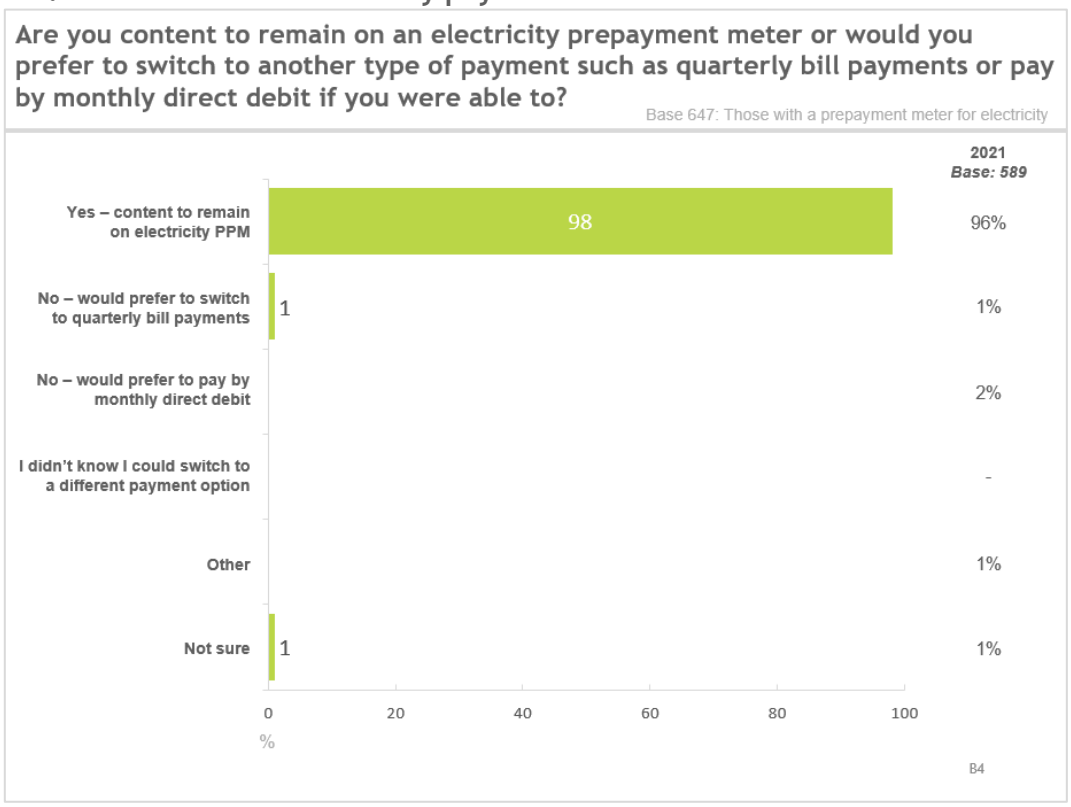


Table 5.6 Reasons for having a prepayment meter for electricity by demographics

		Age			
	Overall *Base: 647*	Under 35 *Base: 153*	35-44 *Base: 173*	45-64 *Base: 236*	65 plus *Base: 81*
It is convenient	73%	73%	72%	73%	77%
The property came with one	15%	20%	18%	11%	6%
Offered one by supplier	4%	1%	5%	3%	7%
To help budget energy costs	38%	21%	39%	49%	32%
Don't need to worry about being cut off due to not paying a bill	4%	3%	4%	3%	5%
To monitor energy use	7%	7%	5%	10%	4%
Given one as part of debt collection	0%	-	1%	0%	-
Never been given the option to move away from a prepayment meter	3%	5%	3%	3%	-
Don't know	0%	-	-	-	1%

The vast majority (98%) of respondents with a prepayment meter stated they were content to remain with one, while 1% confirmed that they would prefer to switch to quarterly payments.

Figure 5.8 Preference for electricity payment method



Gas

Convenience (73%) was also the most common reason for having a gas prepayment meter, with over one third (36%) saying that it was to help their household budget energy costs. 15% said that their property came with a prepayment meter. While convenience was the most common reason given across all age groups, older respondents (53%) were more likely to mention that having a prepayment meter helps to budget their energy costs when compared with younger respondents (18%) (see Figure 5.9 and Table 5.7).

Figure 5.9 Reasons for having a prepayment meter for gas

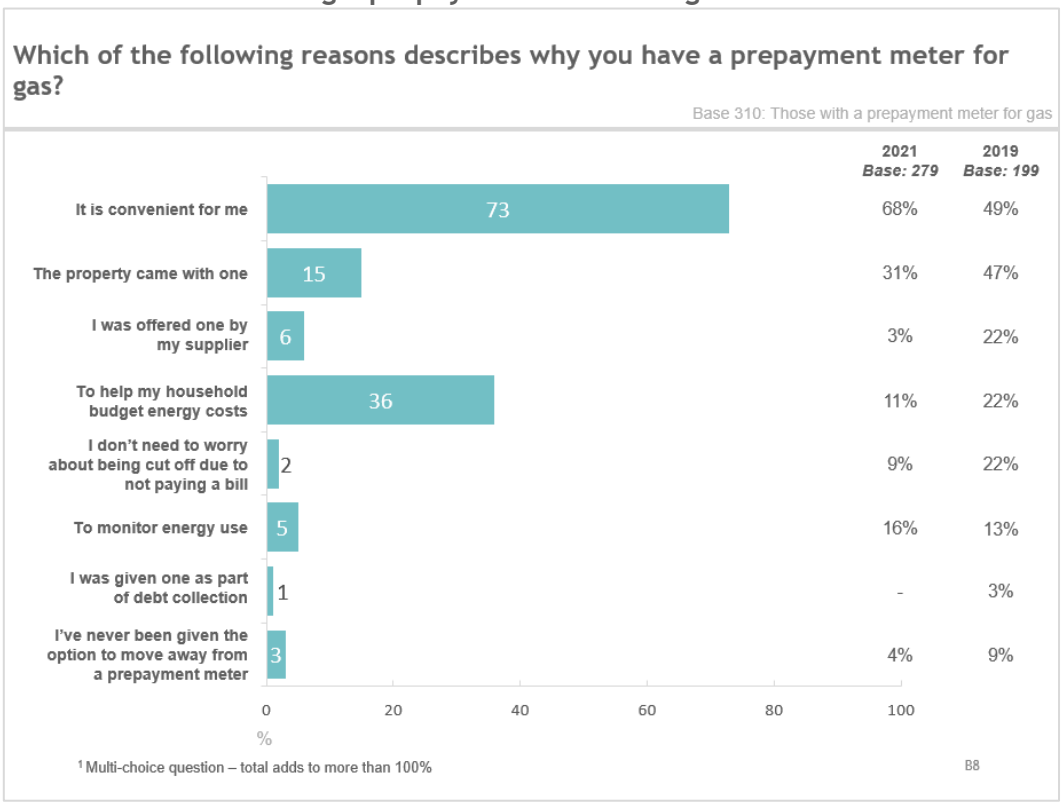
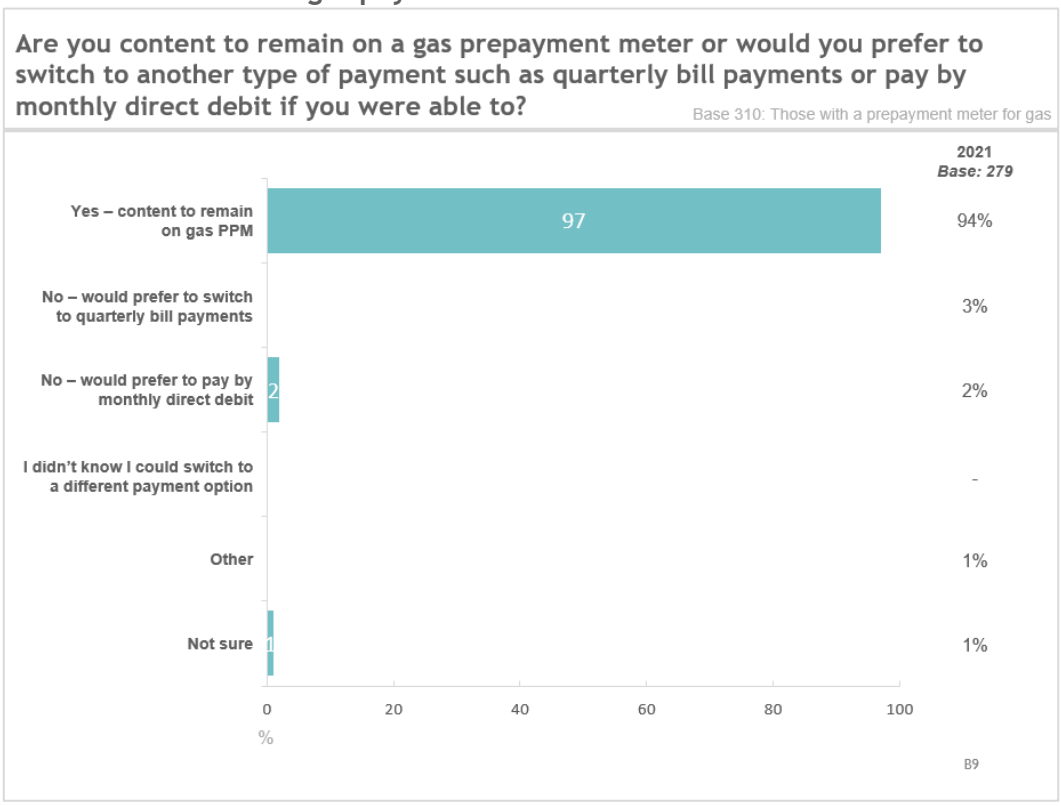


Table 5.7 Reasons for having a prepayment meter for gas by demographics

		Age			
	Overall *Base: 310*	Under 35 *Base: 80*	35-44 *Base: 91*	45-64 *Base: 103*	65 plus *Base: 34*
It is convenient	73%	74%	78%	68%	76%
The property came with one	15%	28%	16%	6%	6%
Offered one by supplier	6%	2%	5%	11%	3%
To help budget energy costs	36%	18%	33%	50%	53%
Don't need to worry about being cut off due to not paying a bill	2%	1%	1%	4%	-
To monitor energy use	5%	5%	1%	9%	6%
Given one as part of debt collection	1%	-	1%	2%	-
Never been given the option to move away from a prepayment meter	3%	5%	-	4%	-

The vast majority (97%) of respondents with a gas prepayment meter stated they were content to remain using one, whereas 2% confirmed that they would prefer to switch to monthly bill payments.

Figure 5.10 Preference for gas payment method

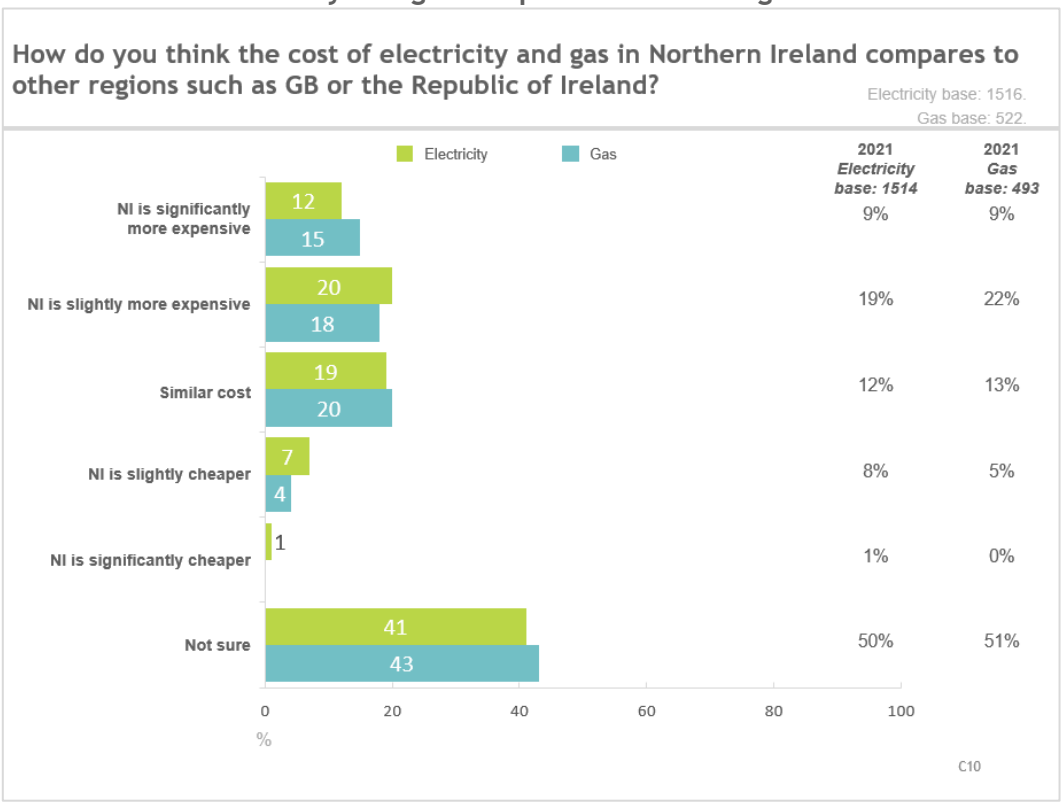


Cost of energy compared to other regions

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). Two in five (41%) respondents were unsure of how the cost of electricity compares, while just under one third (31%) thought that electricity is more expensive in NI. 19% thought that the price is similar across regions, and 8% believe NI is cheaper for electricity.

One third (33%) of gas consumers thought that NI was 'slightly' or significantly' more expensive for gas than other regions, compared to 4% who believed it was cheaper. However, 43% did not know how gas prices compared between regions, with respondents who have a prepayment meter (46%) more likely to be unsure.

Figure 5.11 Cost of electricity and gas compared to other regions



There were several significant differences identified among various subgroups (see Tables 5.8 and 5.9):

- 45 to 64 year olds (38%) were the most likely to think electricity was more expensive in NI when compared with all other age groups, while those aged 65 and over (47%) were more likely to not know how electricity prices compare than 18 to 34 year olds (35%). Younger respondents (39%) were also more likely to believe gas prices in NI are similar to other regions; and
- One third (32%) of those who have access to the internet thought that NI was more expensive for electricity, compared to one quarter (24%) of those who do not have access. Respondents who did not consider themselves to be confident internet users (48%) were more likely to not know how electricity prices compare than those who are confident users (41%).

Table 5.8 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: 1516*	32%	19%	8%	41%	*100%*
Age	Under 35 *Base:257*	27%	28%	10%	35%	*100%*
	35-44 *Base: 317*	27%	16%	9%	48%	*100%*
	45-64 *Base: 548*	38%	16%	8%	37%	*100%*
	65 plus *Base: 376*	27%	21%	5%	47%	*100%*
Internet access	Yes *Base: 1377*	32%	19%	8%	41%	*100%*
	No *Base: 139*	24%	23%	6%	47%	*100%*
Confidence using internet	Not confident *Base: 272*	29%	16%	7%	48%	*100%*
	Neither *Base: 211*	37%	18%	8%	37%	*100%*
	Confident *Base: 1033*	31%	20%	8%	41%	*100%*

Table 5.9 Cost of gas compared to other regions by demographics

		NI is more expensive	Similar cost	NI is cheaper	Not sure	*Total*
Overall	All *Base: 522*	33%	20%	4%	43%	*100%*
Age	Under 35 *Base:112*	29%	39%	3%	29%	*100%*
	35-44 *Base: 140*	26%	16%	7%	51%	*100%*
	45-64 *Base: 171*	39%	12%	3%	46%	*100%*
	65 plus *Base: 92*	38%	18%	1%	42%	*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).

Almost two thirds of respondents overall (63%) reported that they would not be willing to pay anything extra. Around one quarter of consumers (24%) stated that they would be willing to pay extra on projects to protect the environment or to provide extra help for consumers in vulnerable circumstances. 13% indicated they would be willing to pay extra to improve the reliability of the network.

Respondents aged 35 to 44 years old (73%) were more likely to be against extra charges than all other age groups. Respondents in the ABC1 socioeconomic group were more likely than those in the C2DE group to be in support of being charged extra for projects to support the environment (27%, compared to 21%) and for improving the reliability of the network (15%, compared to 11%). Respondents who do not have a prepayment meter for electricity (27%) and gas (33%) were more likely to be in support of being charged extra for projects to support the environment than those who do have prepayment meters (21% and 24% respectively). (see Table 5.10).

Figure 5.12 Paying extra on energy bill

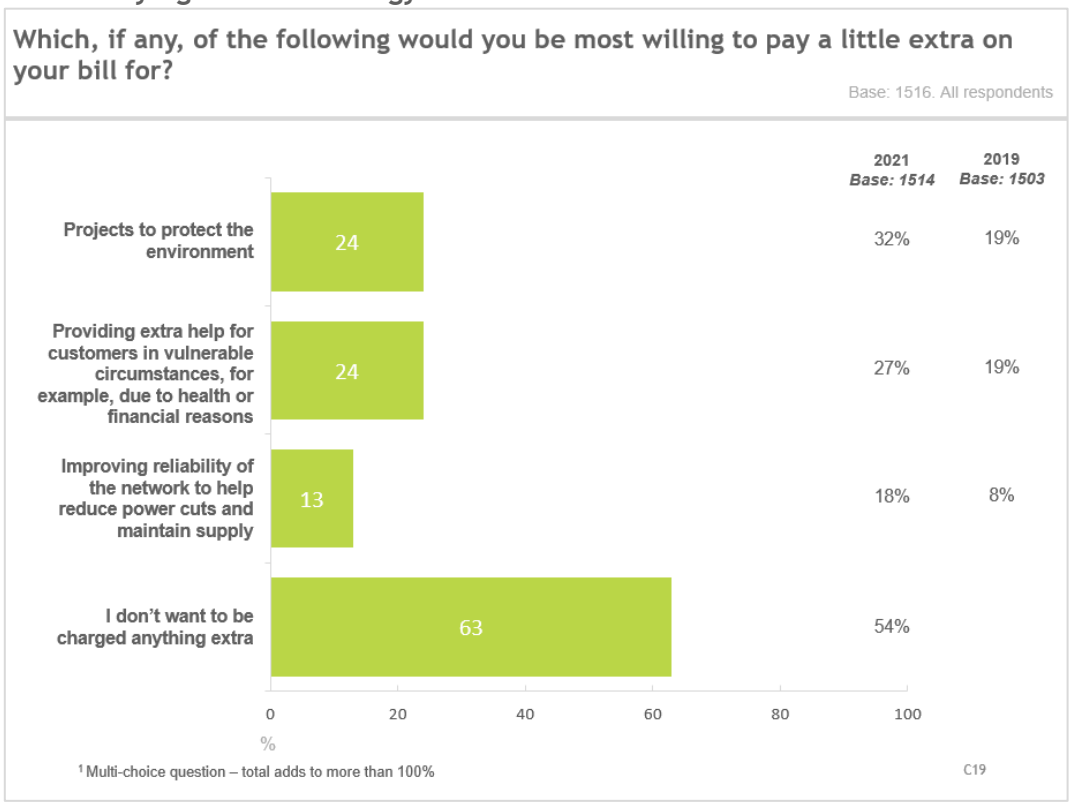


Table 5.10 Paying extra on energy bill by demographics, and payment method

		Projects to protect the environment	Providing extra help for vulnerable customers	Improving reliability of network	I don't want to be charged anything extra
Overall	All *Base: 1516*	24%	24%	13%	63%
Age	Under 35 *Base:257*	25%	23%	10%	60%
	35-44 *Base: 317*	20%	18%	9%	73%
	45-64 *Base: 548*	26%	31%	17%	59%
	65 plus *Base: 376*	26%	20%	12%	61%
SEG	ABC1 *Base: 743*	27%	23%	15%	62%
	C2DE *Base: 747*	21%	24%	11%	64%
Electricity payment method	Prepayment meter *Base: 647*	21%	23%	12%	65%
	Credit meter *Base: 869*	27%	25%	13%	61%
Gas payment method	Prepayment meter *Base: 310*	24%	29%	14%	61%
	Credit meter *Base: 212*	33%	28%	15%	55%

Priority areas for investment remained consistent to the 2021 and 2019 Domestic Trackers, but support for these extra costs has decreased, with domestic consumers now less willing to be charged anything extra on their bill (63%, compared to 54% in 2021) (see Figure 5.12).

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

6. Interactions with energy suppliers

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

- Understanding of written correspondence;
- 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 (46%) and gas (58%) suppliers. 77% of electricity customers reported at least looking at the correspondence (either glancing at it or reading it in full), with 73% of those respondents saying they understood the information. Gas consumers were less likely to read or glance at the correspondence (70%), although 78% of those that did, agreed that the information was clear and understandable.
- Almost two thirds said they trust their electricity supplier to treat them fairly (63%), and just over half (52%) stated they trust their supplier to give them a fair price, with 19% and 23% respectively reporting that they distrust their electricity supplier in these regards. This compares to 10% of respondents in the 2021 Tracker who did not trust their electricity supplier to treat them fairly and 13% who do not trust them to provide a fair price. A similar pattern can be observed with gas customers not trusting their supplier to treat them fairly (25% distrust compared to 12% in 2021) and provide a fair price (31%, compared to 16% in 2021).
- Three quarters (74%) of domestic consumers reported satisfaction with their electricity supplier with 8% expressing dissatisfaction. 70% were satisfied with their gas supplier and 11% were dissatisfied. This represents a decrease in satisfaction since the 2021 Tracker, in which 87% and 83% were satisfied with the service provided by their electricity and gas supplier respectively.
- 11% contacted their electricity supplier in the last year. The most common reasons for this was switching their energy contract (23%), querying a bill (19%) and payment issues (16%). Of those that made contact, 64% found it easy to get in touch, 72% thought they were listened to, 69% felt they were treated fairly, and 67% said that their electricity supplier was supportive.

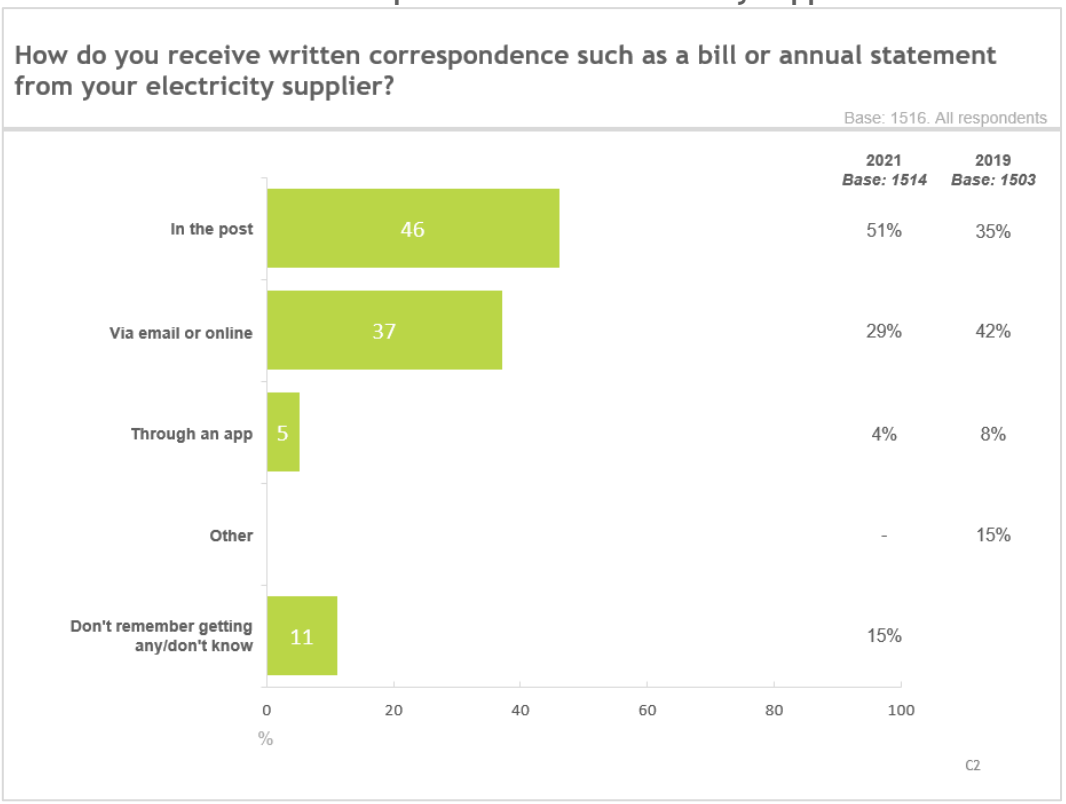
Written correspondence

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

Electricity

Under half (46%) of domestic consumers receive written correspondence from their electricity supplier in the post, while 37% receive it via email or online. 11% 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 (66%), while all other age groups were the most likely age groups to receive theirs through email. However, younger respondents were more likely to be unsure in what form they receive correspondence or if they receive it at all (15%) when compared with older respondents (8%).

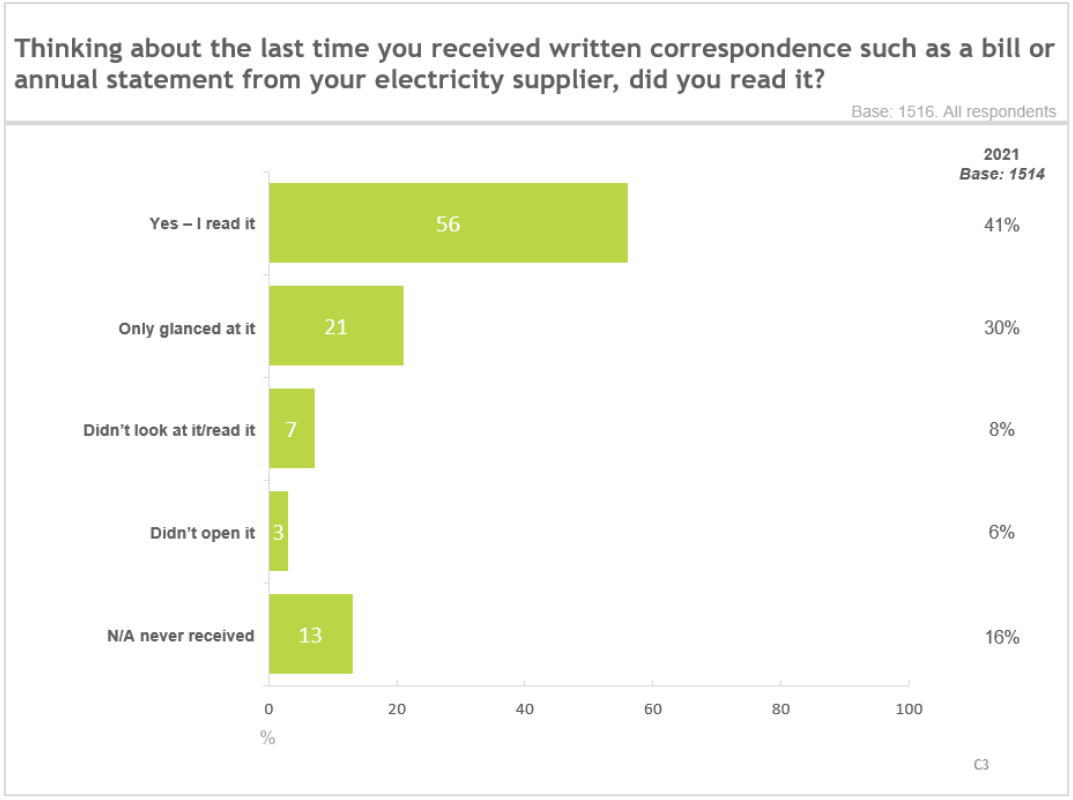
Further analysis also revealed that those living in the fifth quintile (least deprived) were most likely to receive correspondence via email or an app (47%) and less likely to receive theirs by post (44%) when compared with those in the first quintile (most deprived). Respondents with prepayment meters for electricity (20%) were more likely to be unaware of what form they receive their bill in when compared with those who have a credit meter (4%).

Table 6.1 Form of written correspondence from electricity supplier by demographics and payment method

		In the post	Email / online	Through an app	Other	Not sure	*Total*
Overall	All *Base: 1516*	46%	37%	5%	0%	11%	*100%*
Age	Under 35 *Base:257*	35%	40%	10%	0%	15%	*100%*
	35-44 *Base: 317*	36%	45%	8%	-	12%	*100%*
	45-64 *Base: 548*	44%	41%	5%	-	10%	*100%*
	65 plus *Base: 376*	66%	24%	1%	0%	8%	*100%*
MDM Quintile	1 - Most deprived *Base: 287*	52%	32%	5%	-	11%	*100%*
	2 *Base: 297*	47%	34%	6%	0%	12%	*100%*
	3 *Base: 310*	47%	38%	6%	0%	9%	*100%*
	4 *Base: 315*	42%	43%	3%	-	11%	*100%*
	5 - Least deprived *Base: 307*	44%	40%	7%	-	10%	*100%*
Electricity payment method	Prepayment meter *Base: 647*	40%	33%	7%	0%	20%	*100%*
	Credit meter *Base: 869*	51%	41%	4%	-	4%	*100%*

Three quarters (77%) stated that they read or glanced at the latest correspondence they received from their electricity supplier, while 10% did not look at it or open it. 13% 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 (50%) were less likely to say they read written correspondence than credit customers[9] (61%) but were more likely to say they never received any correspondence from their supplier (21% compared to 6% without).

Those aged 65 and over (7%) were less likely than other age groups to say that they had not received any correspondence from their electricity supplier. Three in five (60%) respondents in the ABC1 socioeconomic group said they had read the correspondence, compared to 53% in the C2DE group (see Table 6.2).

Table 6.2 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: 1516*	56%	21%	7%	3%	13%	*100%*
Age	Under 35 *Base:257*	58%	14%	6%	2%	19%	*100%*
	35-44 *Base: 317*	51%	22%	9%	5%	13%	*100%*
	45-64 *Base: 548*	56%	22%	7%	3%	13%	*100%*
	65 plus *Base: 376*	60%	23%	6%	3%	7%	*100%*
SEG	ABC1 *Base: 743*	60%	21%	6%	3%	9%	*100%*
	C2DE *Base: 747*	53%	20%	8%	4%	16%	*100%*
Electricity payment method	Prepayment meter *Base: 647*	50%	19%	7%	3%	21%	*100%*
	Credit meter *Base: 869*	61%	22%	7%	4%	6%	*100%*

Of those who glanced at or read the written correspondence they received, three quarters (73%) agreed or strongly agreed that the information had been presented in a way which was clear and easy to understand, compared to 10% who did not think that this was the case, including 13% of those aged 18 to 34 years old.

[9] 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.

Figure 6.3 Understanding of written correspondence from electricity supplier

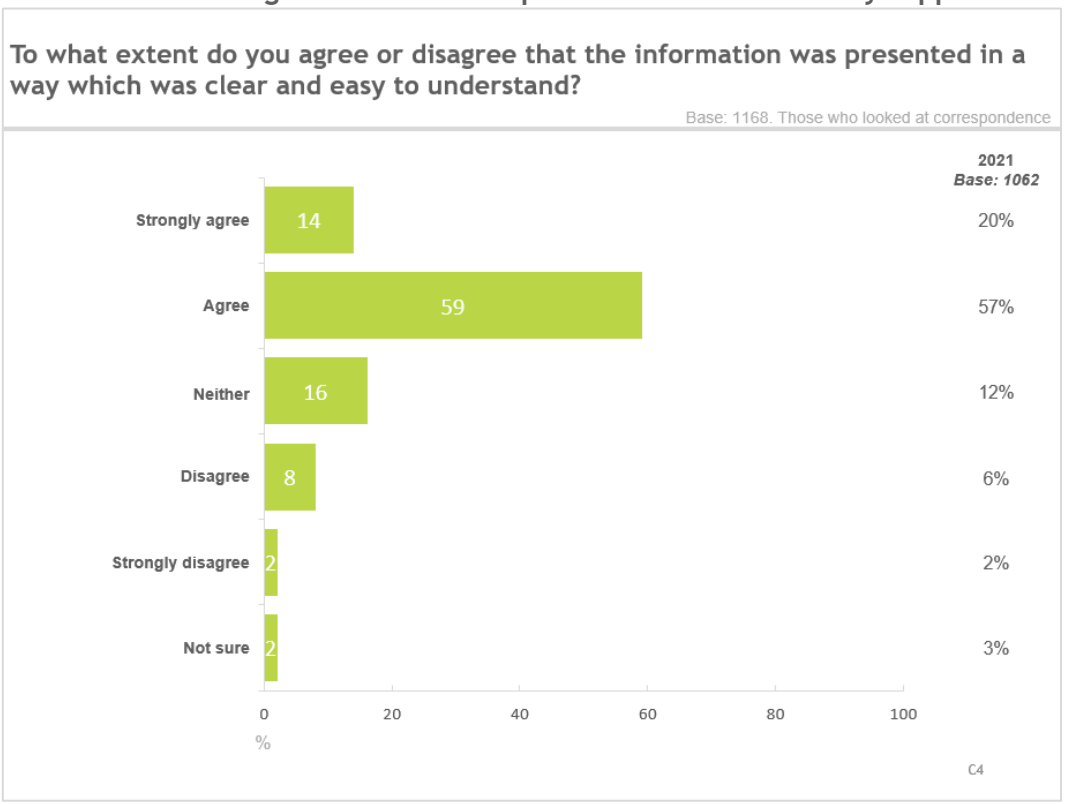


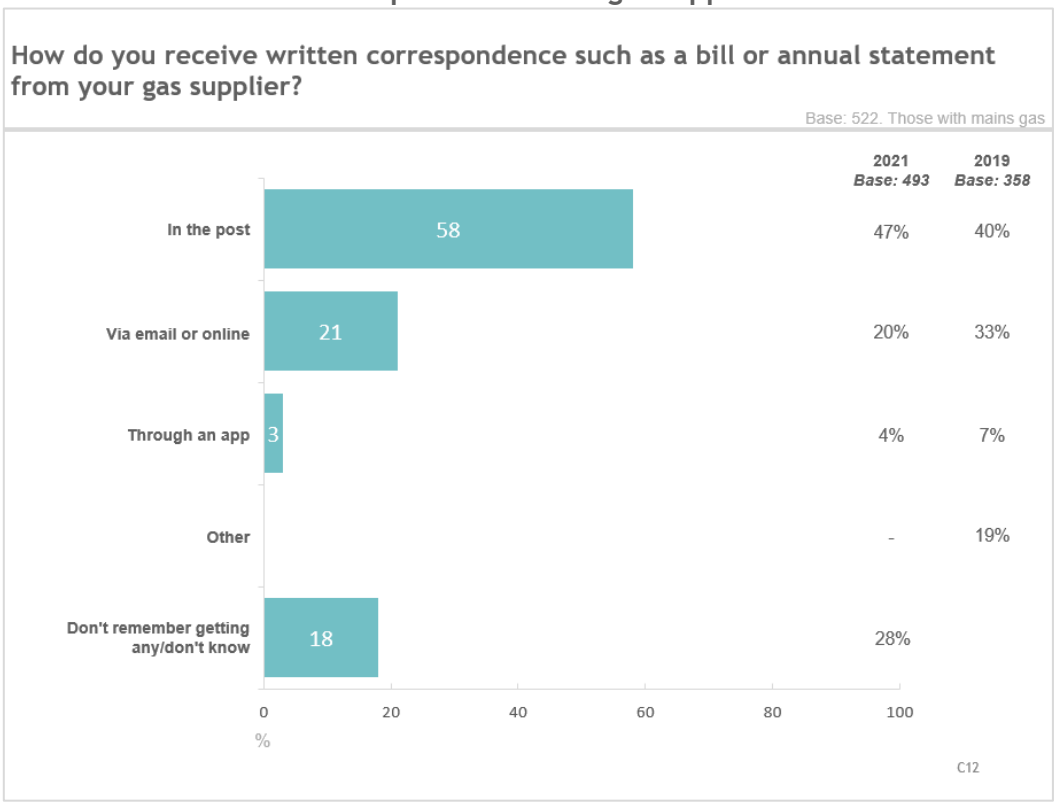
Table 6.3 Understanding of written correspondence from electricity supplier by demographics

		Disagree	Neither	Agree	Not sure	*Total*
Overall	All *Base: 1168*	10%	16%	73%	2%	*100%*
Age	Under 35 *Base:186*	13%	15%	72%	1%	*100%*
	35-44 *Base: 234*	9%	17%	71%	3%	*100%*
	45-64 *Base: 424*	11%	14%	73%	2%	*100%*
	65 plus *Base: 312*	7%	17%	75%	1%	*100%*

Gas

Those with gas heating were more likely to receive correspondence from their supplier through the post (58%), while one in five (21%) obtain theirs in an email or online. 18% stated that they 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 (32%) were more likely to say they receive correspondence via email or online than those with a prepayment meter (14%), who were more likely to report not receiving any correspondence (28%, compared to 4% of credit customers).

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

- 67% of gas customers aged 65 plus confirmed they receive their correspondence through the post, compared to 51% of 18 to 34 year olds;
- Email and online was a more common method amongst ABC1 respondents (28%, compared to 15% in the C2DE group); and
- Email and online was also more popular amongst those living in the least deprived areas (29%) than those in the most deprived areas (15%).

Table 6.4 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: 522*	58%	21%	3%	0%	18%	*100%*
Age	Under 35 *Base:112*	51%	24%	1%	-	24%	*100%*
	35-44 *Base:140*	54%	19%	8%	-	19%	*100%*
	45-64 *Base: 171*	59%	22%	1%	-	18%	*100%*
	65 plus *Base: 92*	67%	17%	1%	1%	13%	*100%*
SEG	ABC1 *Base: 245*	55%	28%	2%	-	15%	*100%*
	C2DE *Base: 266*	60%	15%	3%	0%	21%	*100%*
MDM Quintile	1 - Most deprived *Base: 145*	63%	15%	1%	-	21%	*100%*
	2 *Base: 81*	62%	15%	4%	-	20%	*100%*
	3 *Base: 68*	51%	18%	10%	1%	19%	*100%*
	4 *Base: 82*	57%	26%	1%	-	16%	*100%*
	5 - Least deprived *Base: 146*	53%	29%	1%	-	16%	*100%*
Gas payment method	Prepayment meter *Base: 310*	55%	14%	3%	0%	28%	*100%*
	Credit meter *Base: 212*	62%	32%	2%	-	4%	*100%*

Over half (54%) of gas customers stated that they read the last written correspondence they received from their supplier with 16% saying they only glanced at it. Although 8% said they neither read nor opened it, a further 22% reported to have never received any correspondence, including 33% of those with a gas prepayment meter and 29% of those aged 18 to 34 (see Figure 6.5 and Table 6.6).

Figure 6.5 Approach to receiving written correspondence from gas supplier

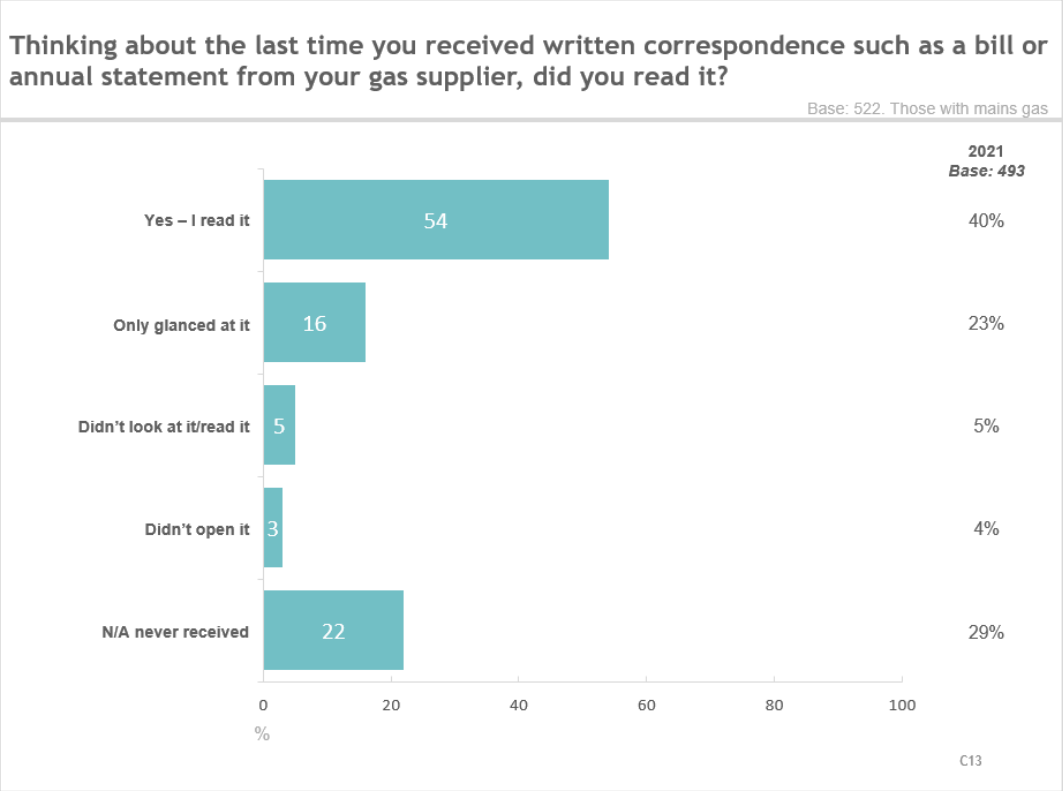


Table 6.5 Approach to receiving written correspondence from electricity supplier by demographics and payment method

		Read it	Glanced at it	Didn't read it	Didn't open it	Never received	*Total*
Overall	All *Base: 522*	54%	16%	5%	3%	22%	*100%*
Age	Under 35 *Base:112*	54%	12%	4%	2%	29%	*100%*
	35-44 *Base:140*	46%	16%	10%	4%	24%	*100%*
	45-64 *Base: 171*	56%	19%	2%	3%	20%	*100%*
	65 plus *Base: 92*	63%	15%	3%	4%	14%	*100%*
Gas payment method	Prepayment meter *Base: 310*	45%	14%	5%	3%	33%	*100%*
	Credit meter *Base: 212*	68%	19%	4%	3%	6%	*100%*

Three quarters (78%) agreed or strongly agreed that the information they had received was presented in a way which was clear and easy for them to understand. 11% disagreed or strongly disagreed with this, including 16% of customers with a credit meter and 7% of those on a prepayment meter (see Figure 6.6 and Table 6.5).

Figure 6.6 Understanding of written correspondence from gas supplier

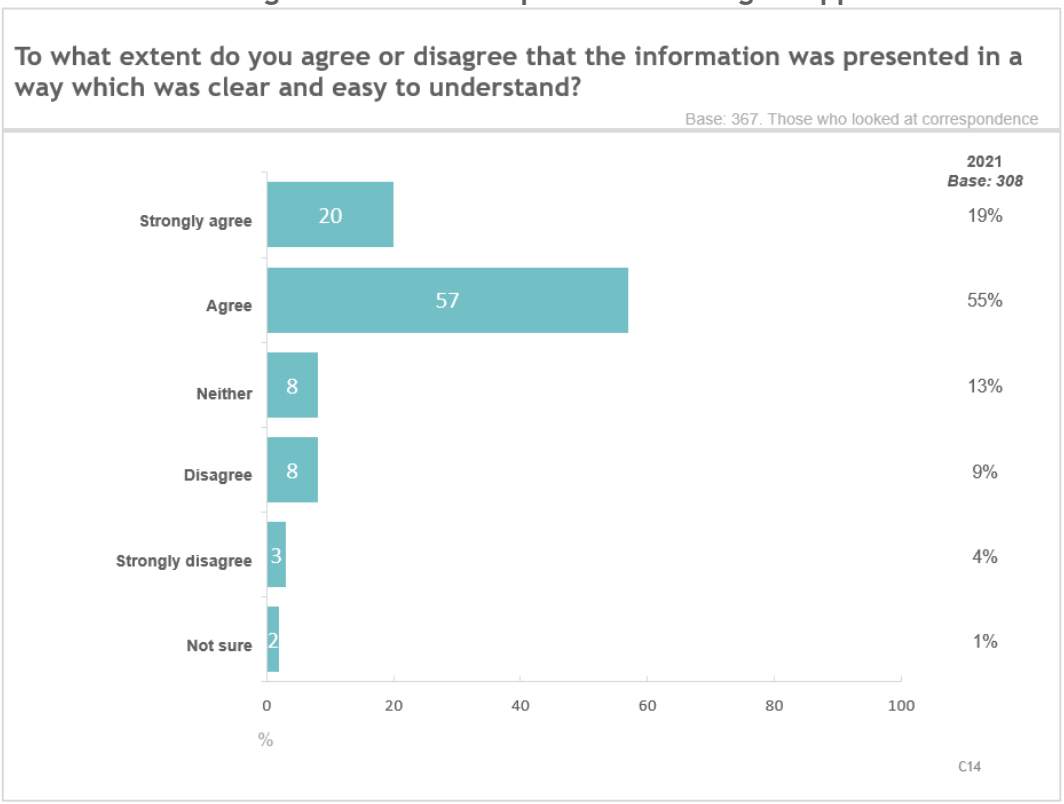


Table 6.6 Understanding of written correspondence from gas supplier by payment method

		Disagree	Neither	Agree	Not sure	*Total*
Overall	All *Base: 367*	11%	8%	77%	2%	*100%*
Gas payment method	Prepayment meter *Base: 182*	7%	7%	84%	2%	*100%*
	Credit meter *Base: 185*	16%	10%	71%	3%	*100%*

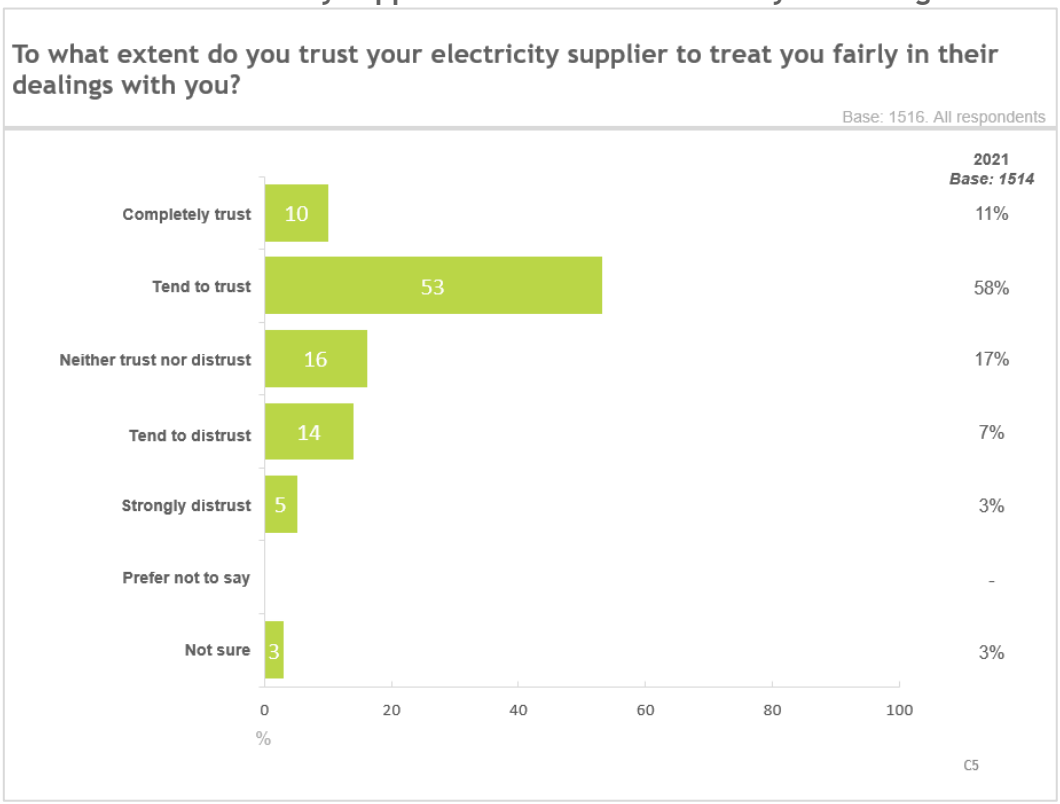
Level of trust in electricity or gas supplier

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

Electricity

Almost two thirds (63%) of domestic consumers trust their electricity supplier to treat them fairly in their dealings, while 52% trust their supplier to give a fair price. This is compared to 19% and 23% 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 6.7). Respondents aged over 65 (71%) were more likely to trust their electricity supplier to treat them fairly, while those in all other age groups were more likely to distrust their supplier in this regard. One third (32%) who had gone without electricity or ran out of credit reported distrust, compared to under one in five (18%) of those who had not experienced this, while those living in urban areas (65%) were more likely to say they trusted their supplier when compared with those in rural areas (58%).

Table 6.7 Trust in electricity supplier to treat customers fairly by demographics, location and electricity self-disconnection

		Distrust	Neither	Trust	Prefer not to say	Not sure	*Total*
Overall	All *Base: 1516*	19%	16%	63%	0%	3%	*100%*
Age	Under 35 *Base:257*	21%	19%	58%	-	2%	*100%*
	35-44 *Base:317*	21%	19%	56%	0%	3%	*100%*
	45-64 *Base:548*	22%	14%	61%	-	2%	*100%*
	65 plus *Base: 376*	11%	14%	71%	0%	3%	*100%*
Location	Urban *Base:966*	17%	14%	65%	0%	3%	*100%*
	Rural *Base:550*	21%	19%	58%	0%	1%	*100%*
Electricity self-disconnection	Yes *Base: 138*	32%	17%	48%	-	3%	*100%*
	No *Base: 1372*	18%	16%	64%	0%	2%	*100%*

Domestic consumers aged 65 and over (61%) were also more likely to trust their electricity supplier to offer a fair price than younger age groups, as were those in the C2DE socioeconomic group (55%) when compared with those in the ABC1 group (49%). Rural respondents (26%) were more likely to distrust their supplier than those in urban areas (21%), as were those who had gone without electricity (39%) when compared with those who had not (21%). Over three in five (62%) respondents living in the most deprived areas had trust in their supplier to provide a fair price, compared to under half (48%) of those in the least deprived areas.

Figure 6.8 Trust in electricity supplier to provide a fair price

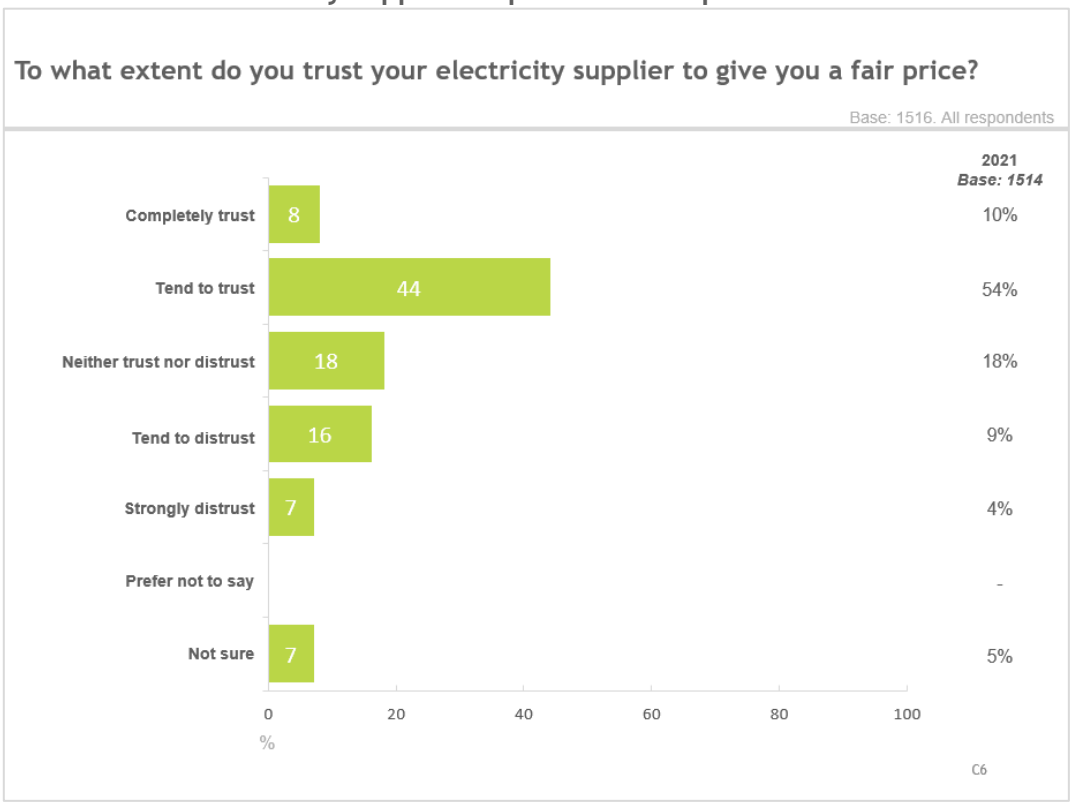


Table 6.8 Trust in electricity supplier to provide a fair price by demographics, location, MDM Quintile, and electricity self-disconnection

		Distrust	Neither	Trust	Not sure	*Total*
Overall	All *Base: 1516*	23%	18%	52%	7%	*100%*
Age	Under 35 *Base:257*	25%	23%	49%	4%	*100%*
	35-44 *Base:317*	26%	21%	47%	7%	*100%*
	45-64 *Base:548*	27%	16%	50%	7%	*100%*
	65 plus *Base: 376*	13%	16%	61%	10%	*100%*
SEG	ABC1 *Base: 743*	24%	20%	49%	7%	*100%*
	C2DE *Base: 747*	22%	16%	55%	7%	*100%*
Location	Urban *Base:966*	21%	17%	55%	7%	*100%*
	Rural *Base:550*	26%	20%	46%	7%	*100%*
MDM Quintile	1 – Most deprived *Base: 287*	19%	14%	62%	5%	*100%*
	2 *Base: 297*	26%	17%	53%	4%	*100%*
	3 *Base: 310*	25%	20%	46%	10%	*100%*
	4 *Base: 315*	23%	18%	51%	7%	*100%*
	5 – Least deprived *Base: 307*	21%	21%	48%	10%	*100%*
Electricity self-disconnection	Yes *Base: 138*	39%	19%	36%	6%	*100%*
	No *Base: 1372*	21%	18%	53%	8%	*100%*

Gas

Levels of trust in gas suppliers were similar to that for electricity suppliers. Half (52%) of those with gas heating stated that they trust their supplier to treat them fairly in their dealings, compared to one quarter (25%) who said they would distrust their supplier. 45% confirmed that they trust their supplier to provide a fair price, with 31% reporting that they would not trust their supplier to do this.

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

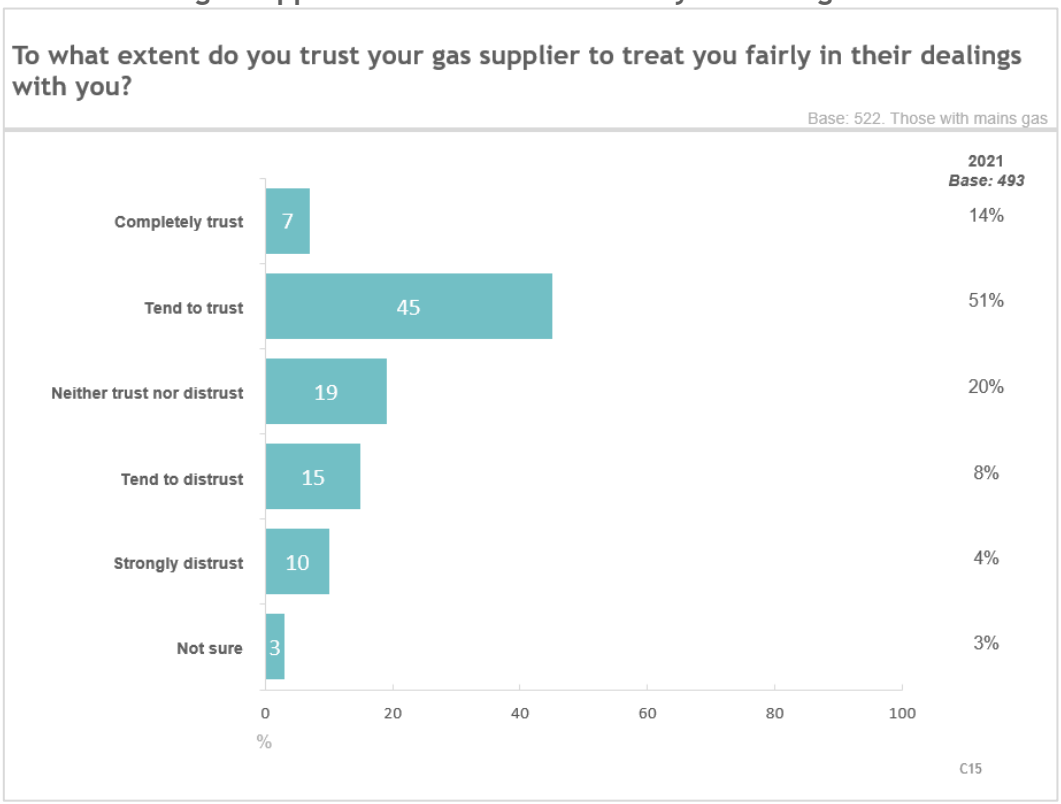
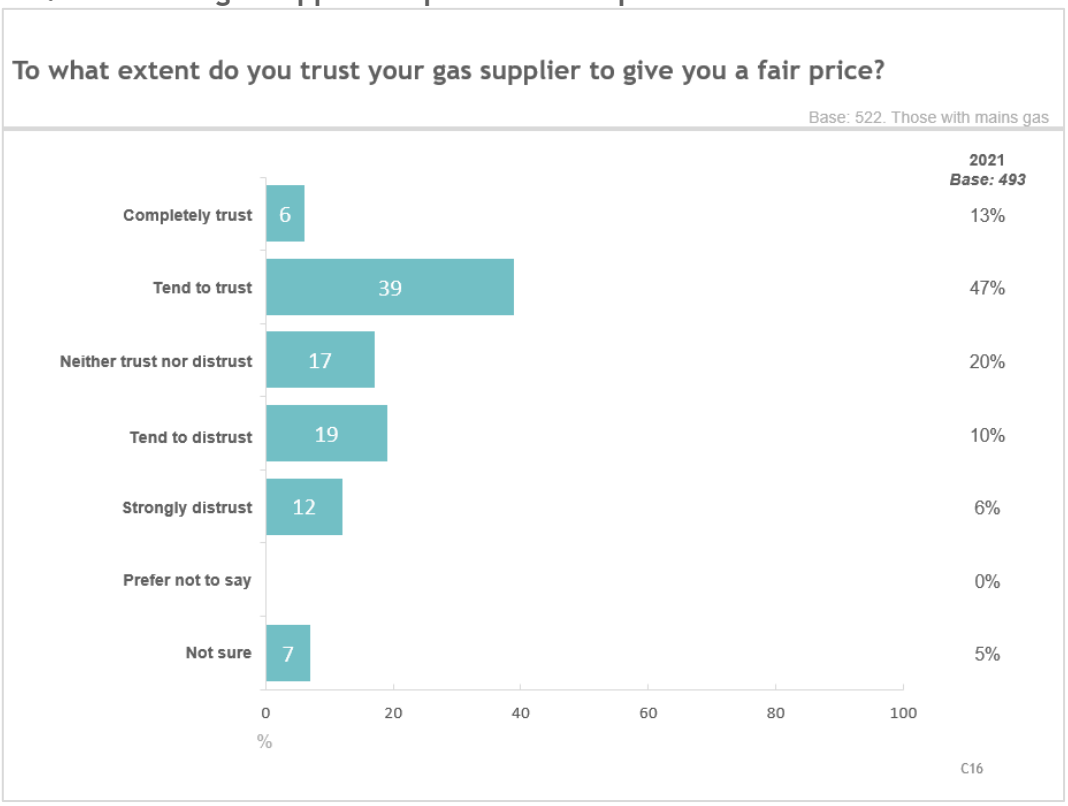


Figure 6.10 Trust in gas supplier to provide a fair price



While domestic consumers are still more likely to trust their energy suppliers to treat them fairly and provide a fair price, the results suggest there is also a growing distrust. In 2021 10% said that they do not trust their electricity supplier to treat them fairly, compared to 19% in 2022, while the number of domestic consumers who do not trust their electricity supplier to provide a fair price has risen from 13% to 23%. A similar pattern can be observed with gas customers not trusting their supplier to treat them fairly (25% distrust compared to 12% in 2021) and provide a fair price (31%, compared to 16% in 2021) (see Figures 6.6 to 6.10).

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

Three quarters (74%) of domestic consumers were satisfied or very satisfied with the service they receive from their electricity supplier, with 8% reporting dissatisfaction. Despite satisfaction being high, there were some subgroups who were more likely than others to report dissatisfaction, including those living in rural areas (11%, compared to 7% in urban areas). Those who had gone without electricity (20%, compared to 7% who had not gone without) were more likely to be dissatisfied with the service received (see Table 6.9).

Figure 6.11 Satisfaction with overall service provided by electricity supplier

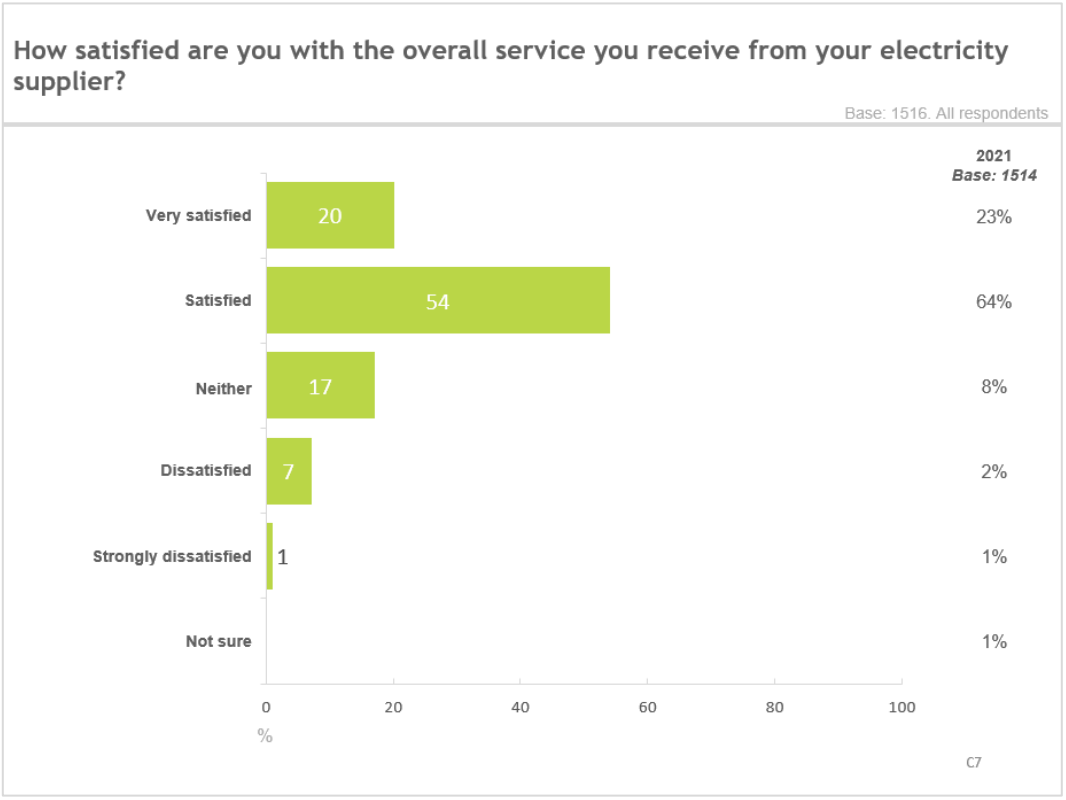


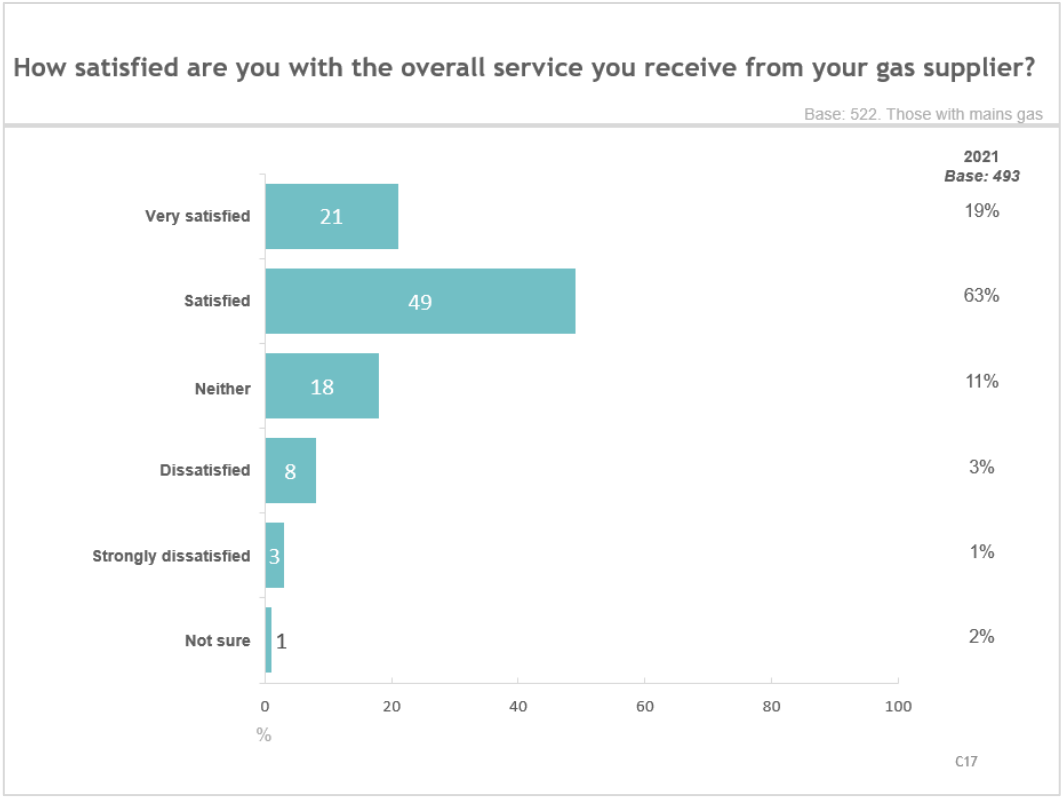
Table 6.9 Satisfaction with overall service provided by electricity supplier by demographics, location and electricity self-disconnection

		Dissatisfied	Neither	Satisfied	Not sure	*Total*
Overall	All *Base: 1516*	8%	17%	74%	0%	*100%*
SEG	ABC1 *Base: 743*	9%	17%	74%	0%	*100%*
	C2DE *Base: 747*	7%	17%	75%	1%	*100%*
Location	Urban *Base: 966*	7%	16%	76%	1%	*100%*
	Rural *Base: 550*	11%	18%	71%	0%	*100%*
Electricity self-disconnection	Yes *Base: 138*	20%	21%	59%	-	*100%*
	No *Base: 1372*	7%	17%	76%	1%	*100%*

Gas

Overall, gas consumers were also satisfied with the service they receive from their supplier, with 70% saying this, compared to 11% who were dissatisfied.

Figure 6.12 Satisfaction with overall service provided by gas supplier



Although it is still more likely that domestic consumers are satisfied with their electricity and gas supplier, the results from the 2022 Domestic Tracker demonstrate a decrease in satisfaction from 2021. In 2021, 87% indicated that they were satisfied with their electricity supplier, compared to 74% in 2022, while dissatisfaction has risen from 3% to 8%. Satisfaction with gas suppliers has also decreased from 83% to 70% in 2022, while dissatisfaction has increased from 4% to 11% (see Figures 6.11 to 6.12).

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

11% of respondents had contacted their electricity supplier in the last 12 months (see Figure 6.13).

Respondents who had gone without electricity or run out of credit (22%) were more likely to have contacted their electricity supplier when compared with those who had not (10%), as were those who had switched their electricity supplier in the last three years (16%, compared to 8% of those who had not).

Figure 6.13 Contact with electricity supplier in the last 12 months

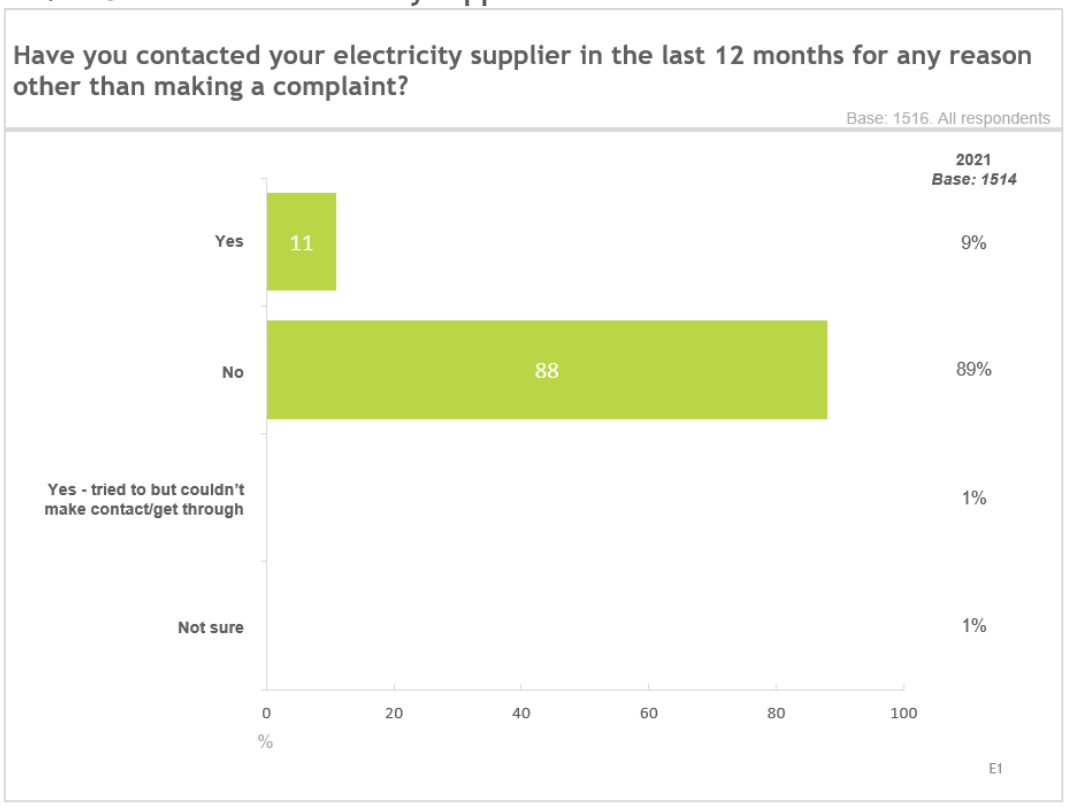


Table 6.10 Contact with electricity supplier in the last 12 months by electricity self-disconnection and switching

		Yes	No	Couldn't get through	Not sure	*Total*
Overall	All *Base: 1516*	11%	88%	0%	0%	*100%*
Electricity self-disconnection	Yes *Base: 138*	22%	78%	-	-	*100%*
	No *Base: 1372*	10%	90%	0%	0%	*100%*
Electricity switching	Switchers *Base: 478*	16%	84%	0%	-	*100%*
	Non-switchers *Base: 1038*	9%	91%	0%	0%	*100%*

One quarter (23%) 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 (35%, compared to 13% of non-switchers). Those who had gone without electricity (39%) were also more likely to have contacted their supplier to switch contract. 19% reported that they made contact as they wanted to query a bill, and a further 16% said they had a payment issue that they wanted to report.

Figure 6.14 Reasons for contacting electricity supplier

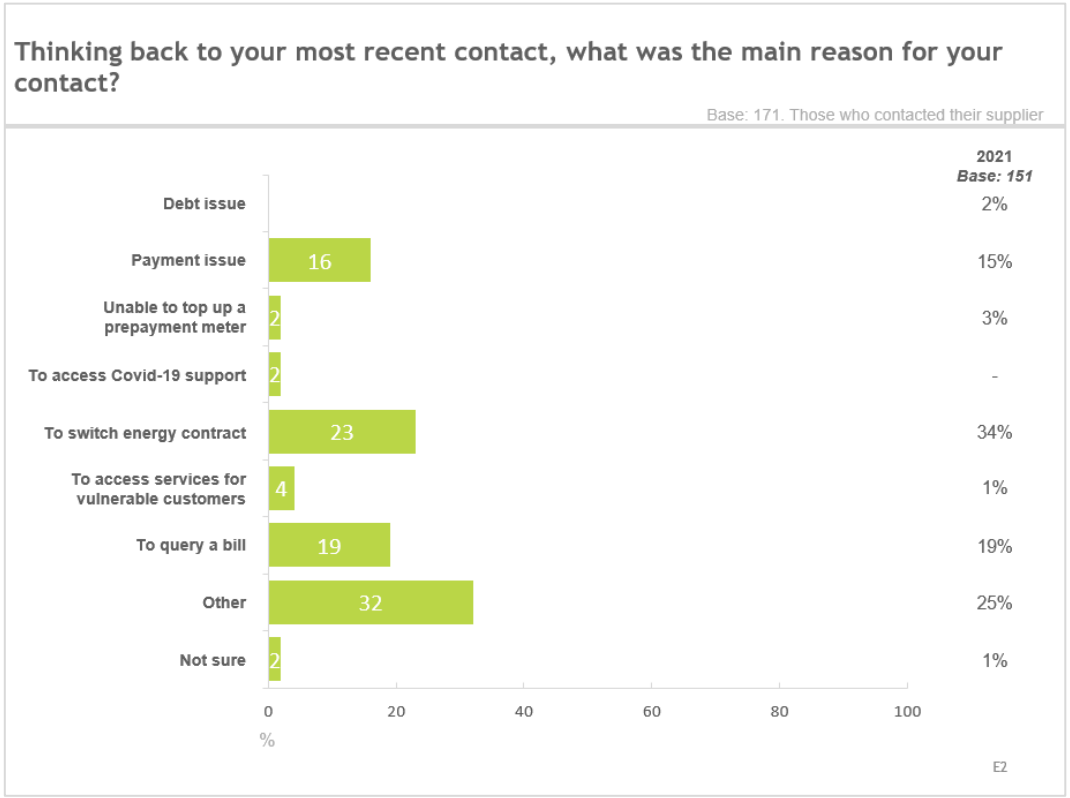


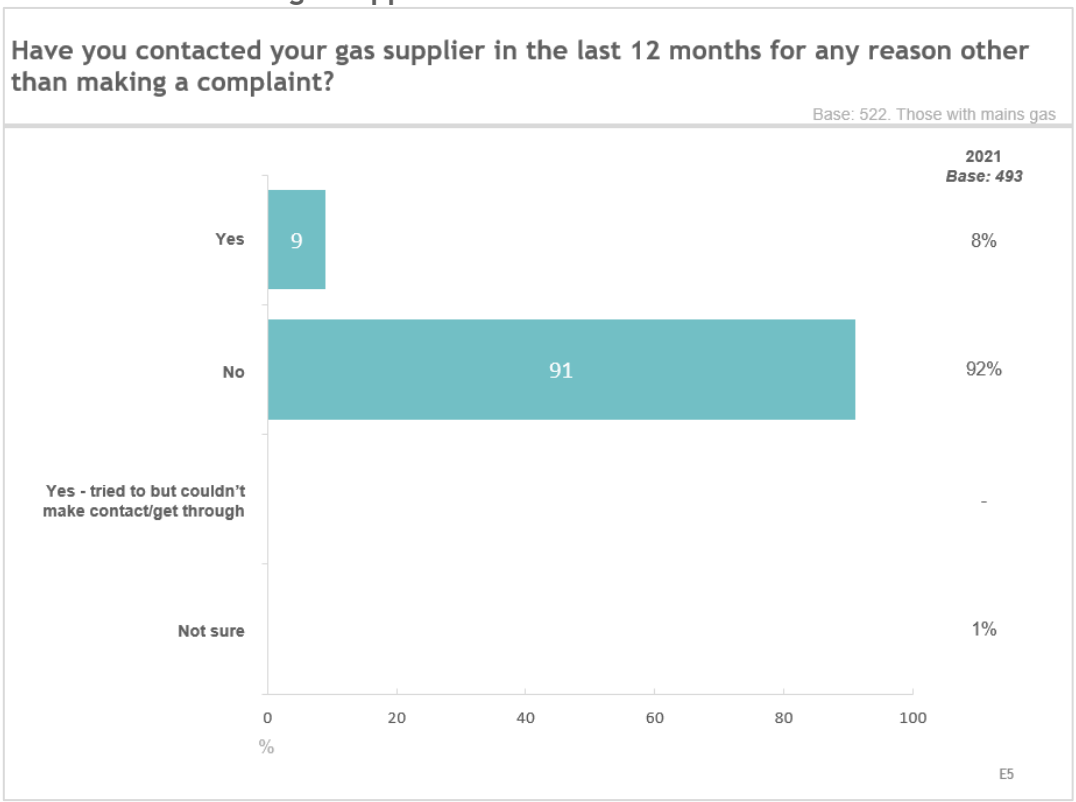
Table 6.11 Reasons for contacting electricity supplier by electricity self-disconnection and switching

		Electricity self-disconnection		Electricity switchers	
	Overall *Base: 171*	Yes *Base: 31*	No *Base: 138*	Switchers *Base: 78*	Non-switchers *Base: 93*
Payment issue	16%	16%	17%	15%	17%
Unable to top up a prepayment meter	2%	3%	2%	3%	2%
To access Covid-19 support	2%	-	2%	1%	2%
To switch energy contract	23%	39%	20%	35%	13%
To access services for vulnerable customers	4%	6%	3%	-	6%
To query a bill	19%	16%	20%	17%	22%
Other	32%	19%	34%	27%	35%
Not sure/can't remember	2%	-	3%	3%	2%
Total	*100%*	*100%*	*100%*	*100%*	*100%*

Gas

9% of respondents with gas heating contacted their supplier in the last 12 months. Of these, 23% said the reason was to report a payment issue, 21% wanted to query a bill, while 10% wanted to switch their energy contract.

Figure 6.15 Contact with gas supplier in last 12 months



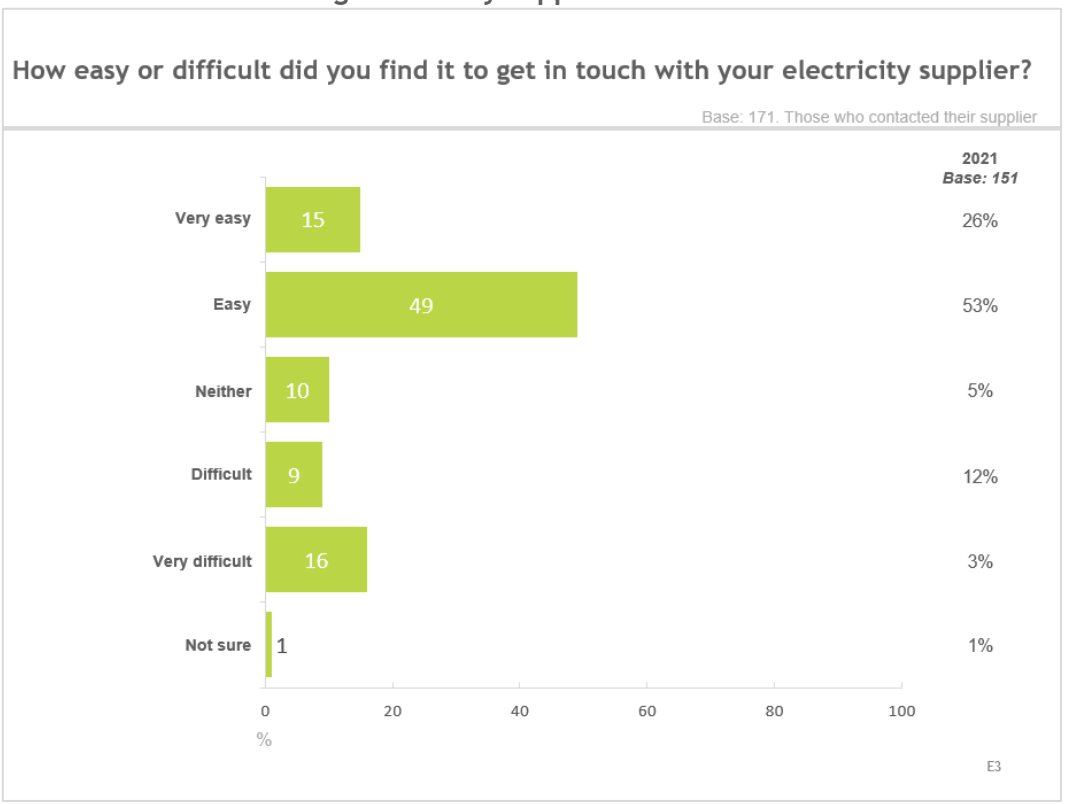
Ease of contacting supplier

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 two thirds (64%, *n=109*) found it 'easy' or 'very easy', with 25% (*n=43*) finding it 'difficult' or 'very difficult' (see Figure 6.16).

Figure 6.16 Ease of contacting electricity supplier



Gas

Of the 48 respondents who contacted their gas supplier, 25 thought it was 'easy' or 'very easy' to make contact, while 21 respondents reported it was 'difficult' or 'very difficult'.

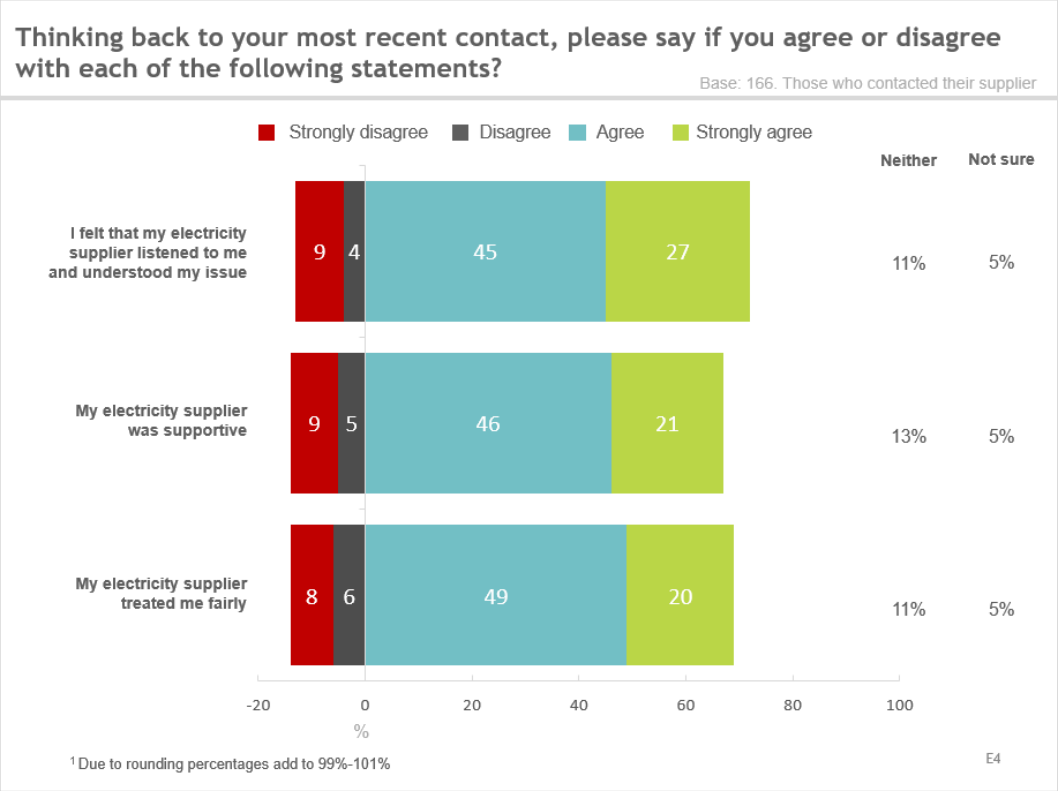
Experience of interacting with supplier

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

Electricity

Almost three quarters (72%) of 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 two thirds (67%) thought their electricity supplier was supportive, 14% disagreed with this. 69% agreed that they were treated fairly and 14% disagreed.

Figure 6.17 Experience of interacting with electricity supplier



Gas

33 of the 46 respondents who contacted their gas supplier reported they were listened to and understood when they made contact. 29 agreed that their supplier was supportive, and 31 respondents said they were treated fairly.

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

7. Complaint handling

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

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

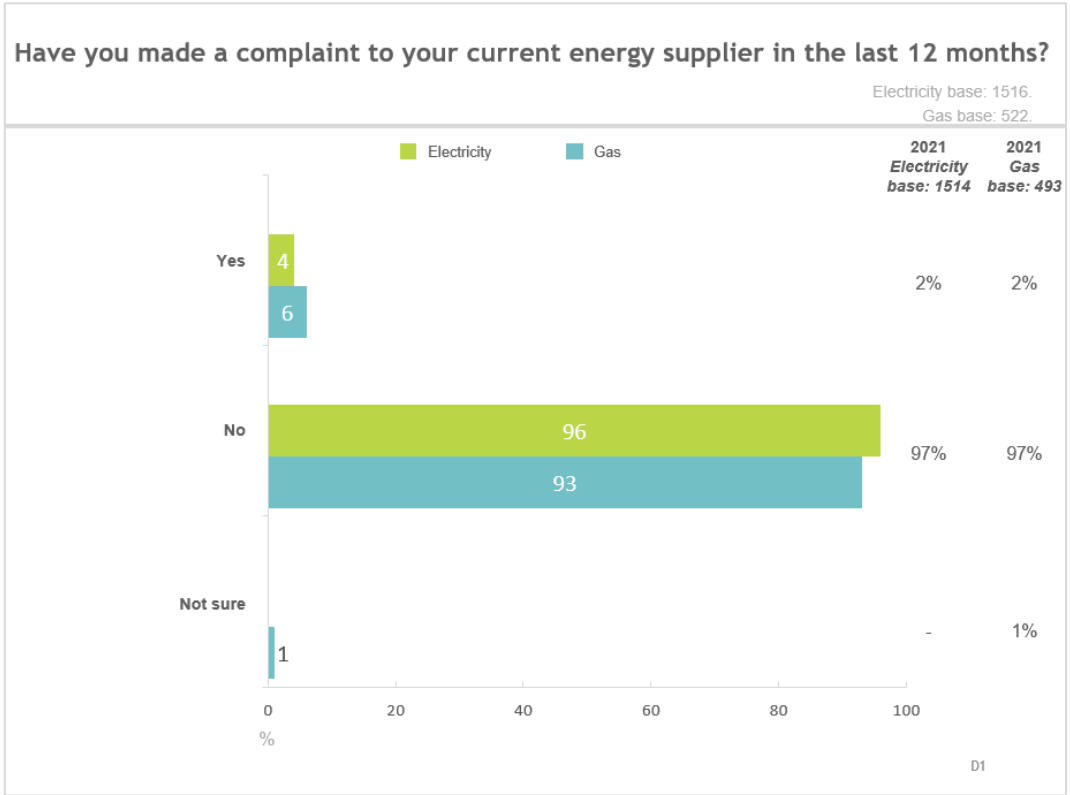
Key findings

- 4% of both electricity and 6% of gas consumers had made a complaint to their electricity or gas supplier in the past year.
- 5% stated that they had wanted to make a complaint to their electricity and 7% to their gas supplier in the past but left it unreported.

Incidence of making a complaint

4% of electricity and 6% of 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, those aged 18 to 34 (6%) were more likely to have made a complaint to their electricity supplier than those aged 65 and over (1%), as were those living in social housing (8%) when compared with those who own their home (3%). 14% of those who had gone without electricity and 7% of those who had switched electricity supplier said they had complained, compared to 3% who had not gone without electricity and 3% of those who had not switched.

With regards to gas customers, 10% of those with a credit meter had complained to their gas supplier, compared to 3% of those with a prepayment meter (see Table 8.1).

Table 7.1 Incidence of making a complaint to supplier by demographics, tenure, electricity self-disconnection, electricity switching, and gas payment method

		Yes	No	Not sure	*Total*
Overall	All *Base: 1516*	4%	96%	0%	*100%*
Age	Under 35 *Base:257*	6%	94%	0%	*100%*
	35-44 *Base:317*	3%	97%	-	*100%*
	45-64 *Base:548*	5%	95%	0%	*100%*
	65 plus *Base: 376*	1%	98%	1%	*100%*
Tenure	Own home *Base: 1180*	3%	96%	0%	*100%*
	Private rented *Base: 163*	5%	95%	-	*100%*
	Social housing *Base: 160*	8%	92%	1%	*100%*
Electricity self-disconnection	Yes *Base: 138*	14%	86%	-	*100%*
	No *Base: 1372*	3%	97%	0%	*100%*
Electricity switching	Switchers *Base: 478*	7%	93%	0%	*100%*
	Non-switchers *Base: 1038*	3%	97%	0%	*100%*
Gas	All *Base: 522*	6%	93%	1%	*100%*
Gas payment method	Prepayment meter *Base: 310*	3%	97%	0%	*100%*
	Credit meter *Base: 212*	10%	89%	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 60 electricity customers who made a complaint to their supplier, 29 found it easy to make the complaint, while 28 respondents found it difficult.

Gas

15 of the 31 gas customers who made a complaint to their supplier found the complaint process easy, compared to 14 respondents who found it difficult.

There has been a slight increase in the incidence of complaints to energy suppliers. 2% of respondents in the 2021 Tracker reported that they had made a complaint to their electricity supplier, while 2% of those with gas had complained to their supplier. This compares to 4% and 6% of respondents who had made a complaint to their electricity and gas supplier respectively. While the bases are too small to draw inferences from, it is also noteworthy that around half of those who had complained to their electricity or gas supplier found it difficult, with similar proportions observed in the 2021 Tracker.

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

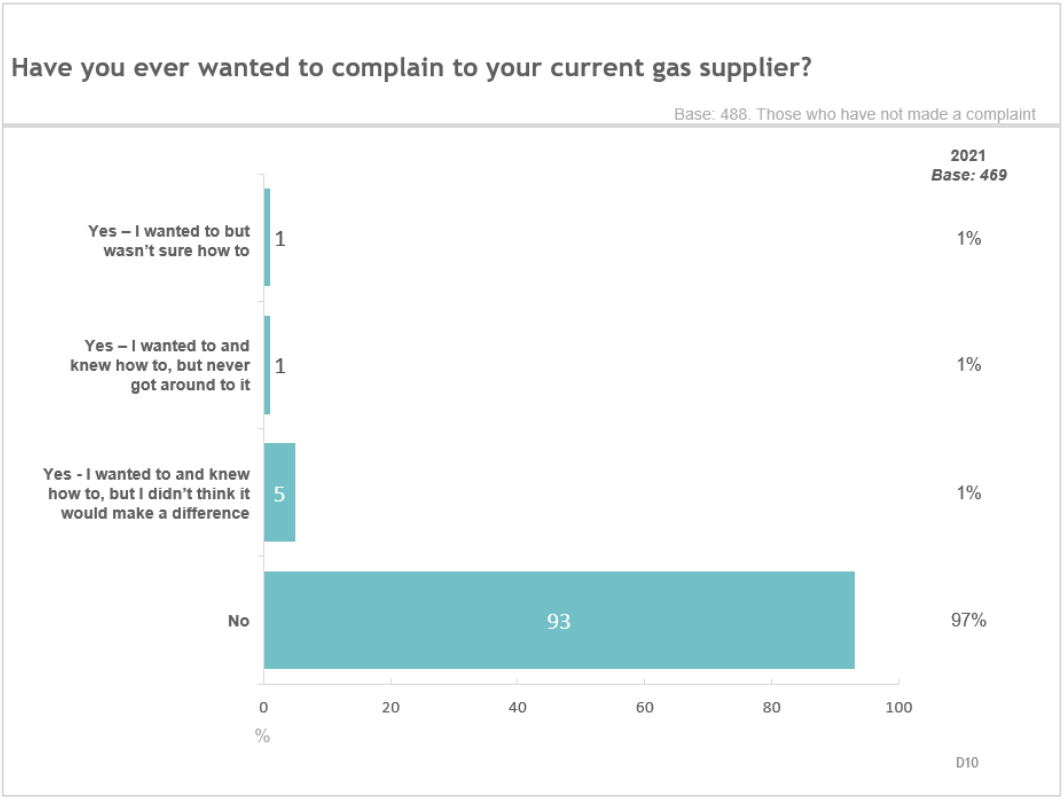
The vast majority (95%) stated that they have never wanted to make a complaint to their electricity supplier, 3% had wanted to make a complaint but did not think it would make a difference, and a further 1% wanted to make a complaint but were unsure about how to do this. 1% wanted to make a complaint and knew how to, but never got round to doing it.

Figure 7.2 Incidence of unreported complaints to electricity supplier

Gas

Similarly, the vast majority (93%) of gas consumers confirmed that they have never wanted to make a complaint to their supplier. 5% knew how to make a complaint but did not think it would make a difference, while 1% either were not sure how to or never got round to making a complaint.

Figure 7.3 Incidence of unreported complaints to gas supplier



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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 (96%) of being able to choose between different electricity suppliers amongst domestic consumers, with 68% of those consumers agreeing that having this choice gives access to better deals. Over half (54%) had compared electricity deals to see if they could switch supplier or tariff. This is up from 40% in the 2021 Tracker. Two in five (41%) of those who have the option to switch between gas suppliers said that they had compared gas deals. This is up from 33% in the 2021 study.
- 48% of electricity consumers and 40% of gas customers were confident that they are on the best energy deal for them.
- 44% of domestic consumers have switched their electricity supplier at least once, a decrease from 46% in the 2021 Tracker; of these, three quarters (72%) have done so within the last three years. In contrast, only 11% of those who have the option had switched gas suppliers.
- Feeling they were overpaying (54%) and reacting to an approach by a doorstep seller (26%) were the main drivers for switching electricity supplier. While these drivers are also evident in the 2021 Tracker, the incidence of reacting to an offer from a doorstep seller has decreased from 31% in 2021 to 26% in 2022.
- Almost half (48%) of electricity consumers who had switched did so through a doorstep seller.
- 80% of respondents agreed that they received the deal they were expecting when they switched electricity supplier, although 8% disagreed. 76% reported a positive and 5% a negative experience when they switched.
- Half (50%) said that they have never switched electricity supplier because they were happy with their current service. Satisfaction with the current service (48%) was also the main reason cited for not switching gas supplier. This is lower than the 2021 Tracker, in which 66% and 61% stated they were happy to remain with their current electricity and gas supplier respectively.
- 21% of both electricity and gas customers said they were likely to switch their supplier in the next 12 months.
- Internet access and confidence using the internet appears to influence the likelihood of comparing energy deals and of switching. Almost all (97%) of those with internet access were aware they could choose between electricity suppliers, while 59% of those who are

confident internet users said they had compared electricity deals compared to 35% who are not confident. Half (47%) of those who have internet access had switched electricity supplier at least once in contrast to 16% of those without internet access.

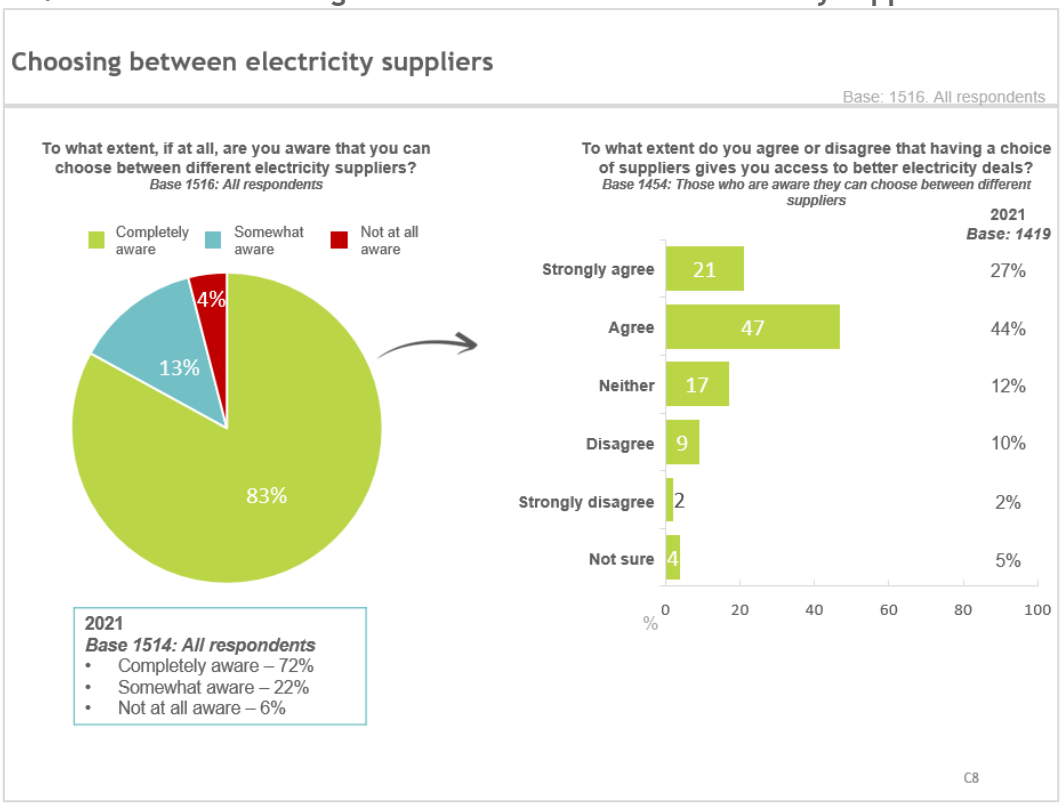
Choosing between electricity suppliers

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. [10]

The majority (96%) of domestic consumers were aware that they can choose between different electricity suppliers, including four in five (83%) who were completely aware of this.

Almost all (99%) of those aged 18 to 34 were aware they could choose between electricity suppliers, compared to 93% of those aged 65 and over. 98% of those in urban areas reported they were aware of this option, compared to 93% living in rural areas, while those who had access to the internet (97%) and who consider themselves to be confident internet users (97%) were more likely to be aware than those without access (86%) and who would not be confident internet users (90%).

Figure 8.1 Awareness of being able to choose between electricity suppliers



[10] 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 demographics, location and internet access

		Completely aware	Somewhat aware	Not at all aware	*Total*
Overall	All *Base: 1516*	83%	13%	4%	*100%*
Age	Under 35 *Base:257*	85%	14%	1%	*100%*
	35-44 *Base:317*	90%	7%	3%	*100%*
	45-64 *Base:548*	85%	11%	3%	*100%*
	65 plus *Base: 376*	74%	19%	7%	*100%*
Location	Urban *Base: 966*	89%	9%	3%	*100%*
	Rural *Base: 550*	74%	19%	7%	*100%*
Internet access	Yes *Base: 1377*	85%	12%	3%	*100%*
	No *Base: 139*	63%	23%	14%	*100%*
Confidence using internet	Not confident *Base: 272*	69%	21%	10%	*100%*
	Neither *Base: 211*	76%	20%	4%	*100%*
	Confident *Base: 1033*	88%	9%	3%	*100%*

68% of those who were aware that they can choose between suppliers agreed having a choice gives them access to better deals, compared to 11% who did not agree.

79% of those who had switched their electricity supplier in the last three years agreed that having a choice provides access to better deals, compared to 63% who had not switched. The following significant differences were identified:

- 72% of 18 to 34 years olds agreed that having a choice of electricity supplier allows them access to a better deal, compared to 61% of those aged 65 plus;
- Urban respondents (72%) were more likely to agree than rural respondents (61%);
- Three quarters (73%) of those who would not be considered vulnerable agreed, compared to 61% in the high or medium vulnerability group (61%);
- Those who were confident as an internet user (73%) were more likely to agree than those who were not confident (57%).

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 vulnerability

		Disagree	Neither	Agree	Not sure	*Total*
Overall	All *Base: 1454*	11%	17%	68%	4%	*100%*
Age	Under 35 *Base: 254*	7%	18%	72%	3%	*100%*
	35-44 *Base: 306*	10%	12%	75%	3%	*100%*
	45-64 *Base: 529*	12%	18%	67%	4%	*100%*
	65 plus *Base: 348*	13%	18%	61%	7%	*100%*
Location	Urban *Base: 941*	10%	14%	72%	4%	*100%*
	Rural *Base: 513*	13%	21%	61%	5%	*100%*
Confidence using internet	Not confident *Base: 246*	15%	20%	57%	7%	*100%*
	Neither *Base: 203*	13%	23%	58%	6%	*100%*
	Confident *Base: 1005*	9%	15%	73%	3%	*100%*
Vulnerability	High/medium vulnerability *Base: 578*	13%	18%	61%	8%	*100%*
	Low vulnerability *Base: 106*	8%	17%	74%	2%	*100%*
	Not vulnerable *Base: 770*	9%	16%	73%	2%	*100%*

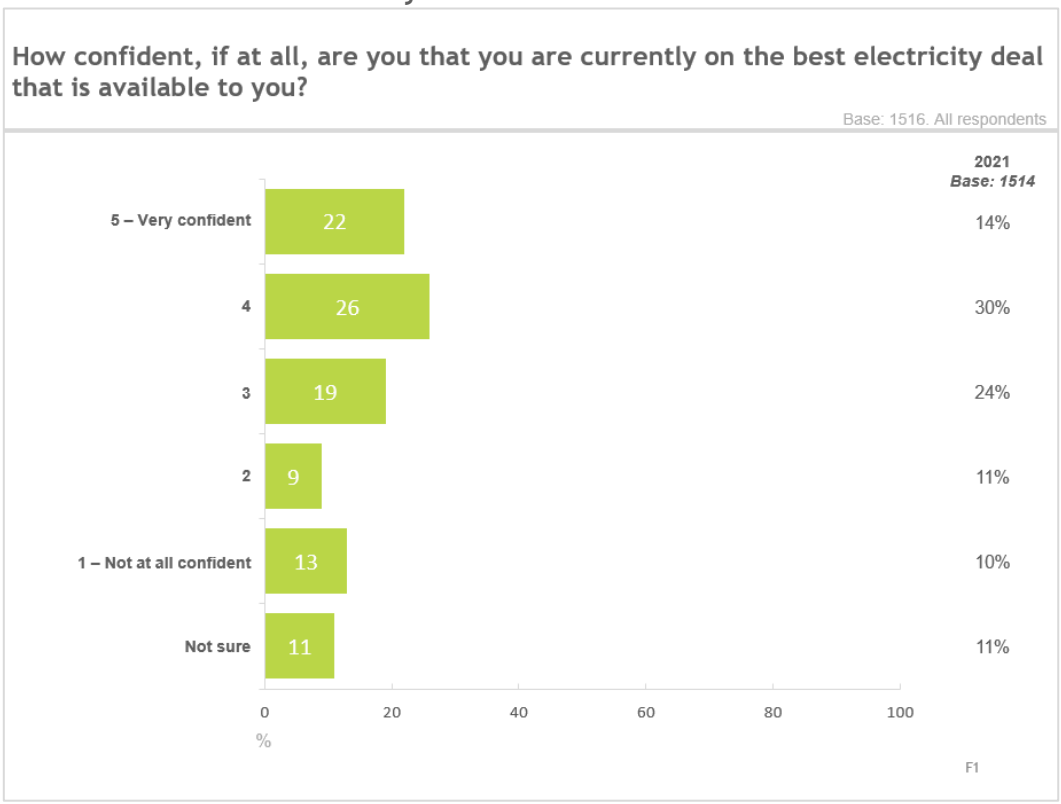
Confidence in current energy deal

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

Almost half (48%) of domestic consumers provided a rating of ‘4’ or ‘5’, including 22% who said they were ‘very confident’ that they were on the best electricity deal. One in five (19%) gave a rating of ‘3’, while 22% were not confident in their current electricity deal (rating ‘1’ or ‘2’) (see Figure 9.2). While those who had switched their electricity supplier in the last three years were more likely to give a rating of ‘4’ (29%, compared to 24% who had not switched), those who had not switched were more likely to give a rating of ‘5’ (24%, compared to 18% who had switched). However, there was no significant difference in overall confidence between these two groups.

Figure 8.2 Confidence in electricity deal



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

- Domestic consumers aged 18 to 34 (24%) were more likely to not be confident that they were on the best electricity deal compared to those aged 65 and over (17%);
- Respondents who were confident using the internet (51%) were more likely to think they were on the best deal than those who were not confident using the internet (44%), suggesting that being confident in using the internet allows domestic consumers more access to the different electricity deals available to them;
- A higher proportion of non-vulnerable respondents (51%) reported being confident with their deal compared to high and medium vulnerability groups (44%);
- 31% of those who had gone without electricity stated they were not confident that they were on the best deal, compared to 20% who had not gone without electricity; and
- Those with a prepayment meter for electricity (51%) were more likely to be confident that they were on the best deal in comparison with those with a credit meter (45%).

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

		Not confident (1,2)	Neither (3)	Confident (4,5)	Not sure	*Total*
Overall	All *Base: 1516*	22%	19%	48%	11%	*100%*
Age	Under 35 *Base: 257*	24%	21%	49%	6%	*100%*
	35-44 *Base: 317*	20%	14%	55%	12%	*100%*
	45-64 *Base: 548*	24%	19%	47%	10%	*100%*
	65 plus *Base: 376*	17%	24%	44%	14%	*100%*
Confidence using internet	Not confident *Base: 272*	21%	20%	44%	15%	*100%*
	Neither *Base: 211*	17%	34%	36%	13%	*100%*
	Confident *Base: 1033*	23%	16%	51%	10%	*100%*
Vulnerability	High/medium vulnerability *Base: 610*	19%	22%	44%	14%	*100%*
	Low vulnerability *Base: 109*	28%	17%	43%	12%	*100%*
	Not vulnerable *Base: 797*	22%	17%	51%	9%	*100%*
Electricity self-disconnection	Yes *Base: 138*	31%	27%	36%	7%	*100%*
	No *Base: 1372*	20%	19%	49%	12%	*100%*
Electricity payment method	Prepayment meter *Base: 647*	22%	17%	51%	10%	*100%*
	Credit meter *Base: 869*	22%	21%	45%	12%	*100%*
Electricity switching	Switchers *Base: 478*	23%	18%	47%	12%	*100%*
	Non-switchers *Base: 1038*	21%	20%	48%	11%	*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 (40%) said that they were confident with the deal they were on (rating '4' or '5'), while 25% gave a rating of '1' or '2' (see Figure 8.3).

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

Figure 8.3 Confidence in gas deal

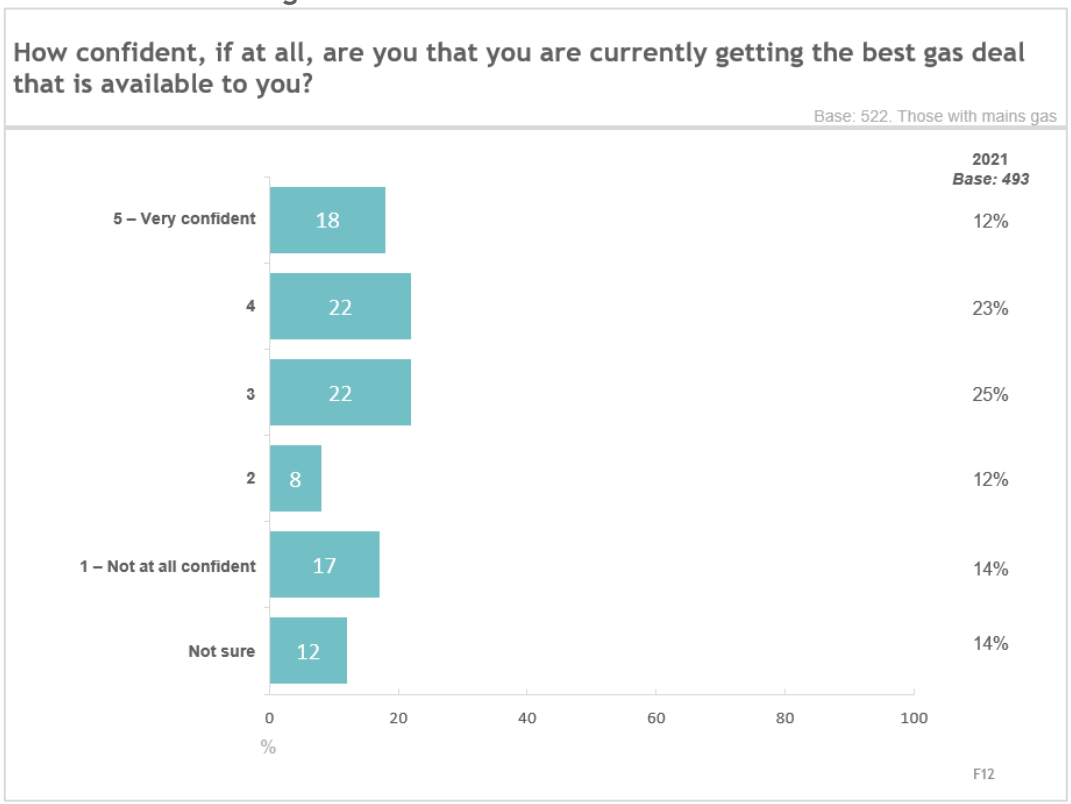


Table 8.4 Confidence in gas deal by payment method and switching behaviour

		Not confident (1,2)	Neither (3)	Confident (4,5)	Not sure	*Total*
Overall	All *Base: 522*	25%	22%	40%	12%	*100%*
Gas payment method	Prepayment meter *Base: 310*	25%	22%	42%	12%	*100%*
	Credit meter *Base: 212*	26%	24%	38%	12%	*100%*
Gas switching	Switchers *Base: 32*	28%	12%	53%	6%	*100%*
	Non-switchers *Base: 490*	25%	23%	40%	12%	*100%*

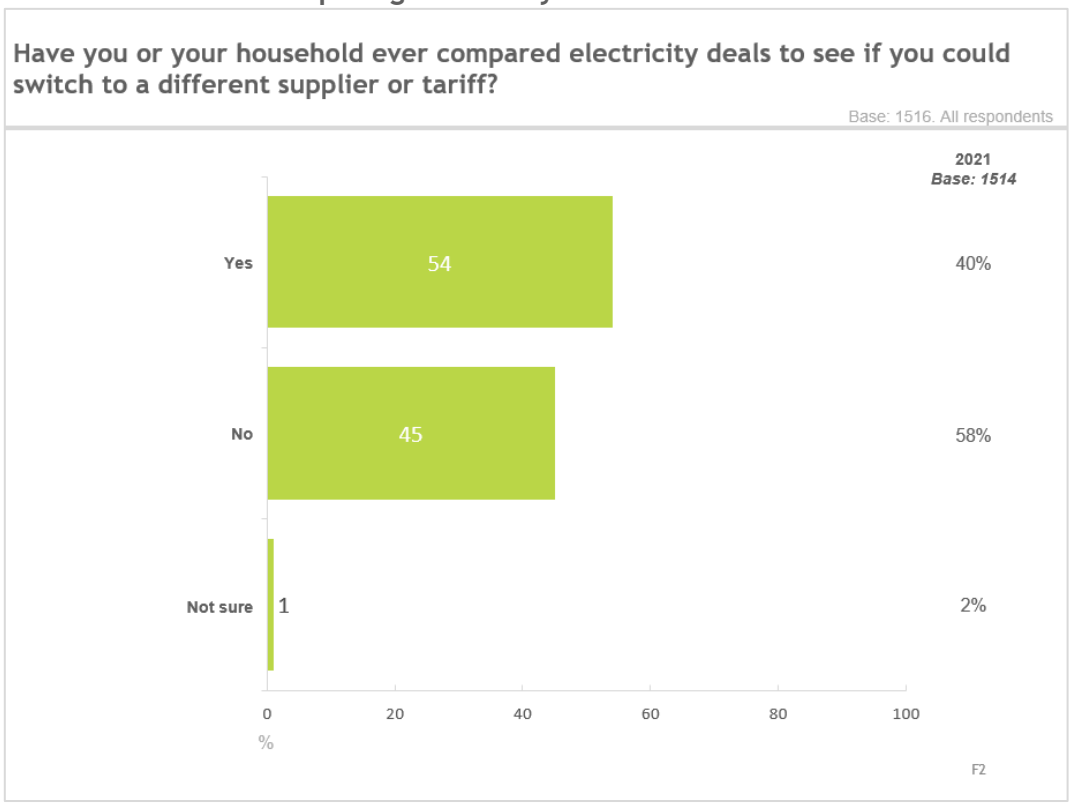
Comparing energy deals

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

Electricity

Over half (54%) of domestic consumers had compared their electricity deal. Respondents who have a prepayment meter (60%) were more likely to have compared energy deals than those without (50%). Those who had switched electricity supplier within the last three years (83%) were more likely to have compared electricity deals, compared to 40% 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 (59%) were more likely to have compared deals than older respondents aged 65 and over (42%);
- 58% of those in the ABC1 group had compared their deal, while half (50%) of those in the C2DE group had done so;
- Respondents living in urban areas (58%) were more likely than those living in rural areas (47%) to have compared their electricity deal;
- 56% of those with access to the internet and 59% who were confident internet users said they had compared deals, compared to 32% who did not have internet access and 35% 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, location, internet access, payment method and switching

		Yes	No	Not sure	*Total*
Overall	All *Base: 1516*	54%	45%	1%	*100%*
Age	Under 35 *Base: 257*	59%	40%	1%	*100%*
	35-44 *Base: 317*	62%	37%	1%	*100%*
	45-64 *Base: 548*	55%	44%	1%	*100%*
	65 plus *Base: 376*	42%	56%	1%	*100%*
SEG	ABC1 *Base: 743*	58%	42%	1%	*100%*
	C2DE *Base: 747*	50%	49%	1%	*100%*
Location	Urban *Base: 966*	58%	42%	1%	*100%*
	Rural *Base: 550*	47%	52%	1%	*100%*
Internet access	Yes *Base: 1377*	56%	43%	1%	*100%*
	No *Base: 139*	32%	66%	1%	*100%*
Confidence using internet	Not confident *Base: 272*	35%	64%	2%	*100%*
	Neither *Base: 211*	51%	47%	1%	*100%*
	Confident *Base: 1033*	59%	40%	1%	*100%*
Electricity payment method	Prepayment meter *Base: 647*	60%	40%	0%	*100%*
	Credit meter *Base: 869*	50%	49%	1%	*100%*
Electricity switching	Switchers *Base: 478*	83%	16%	1%	*100%*
	Non-switchers *Base: 1038*	40%	59%	1%	*100%*

Three quarters (72%) of those who had compared their deal found this ‘easy’ or ‘very easy’ to do, compared to 11% who said this was ‘difficult’ or ‘very difficult’ for them. While a similar proportion of respondents across all age groups found comparing deals easy, those aged 65 and over were less likely to find it easy (62%, compared to 75% of 18 to 34 year olds, 74% aged 35 to 44, and 73% aged 45 to 64). Respondents with access to the internet (73%) and those who were confident with using the internet (76%) were significantly more likely to find comparing electricity deals easy.

Figure 8.5 Ease of comparing electricity deal

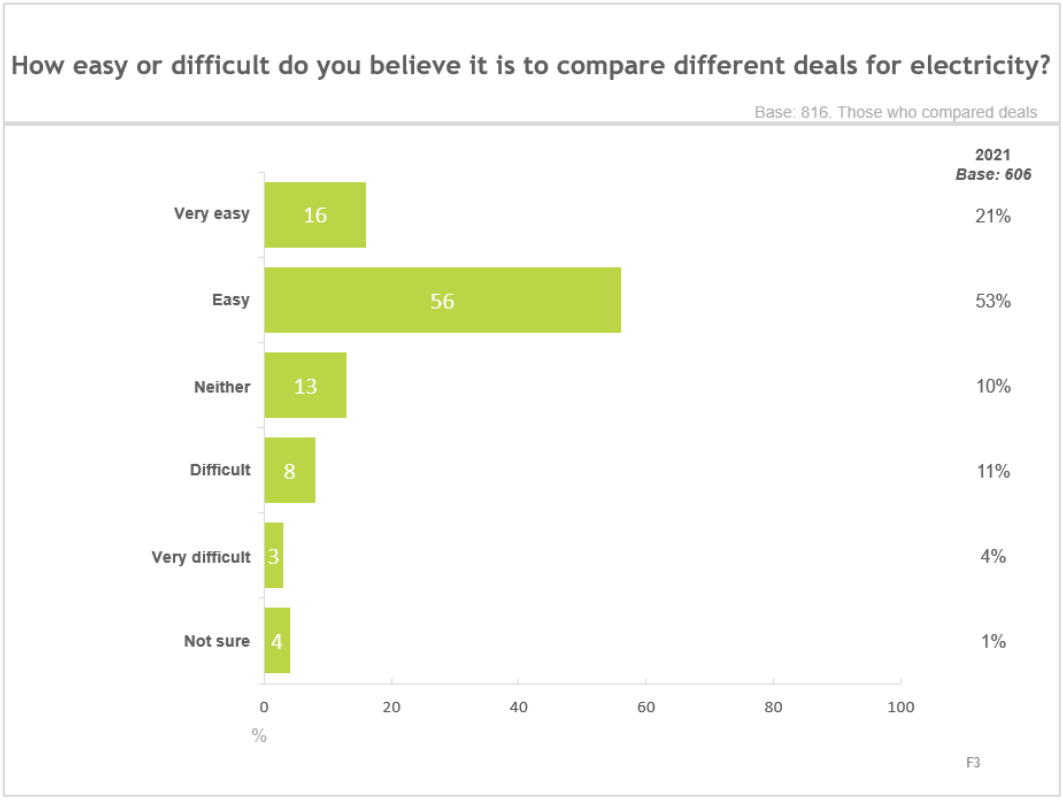


Table 8.6 Ease of comparing electricity deal by demographics and confidence of using the internet

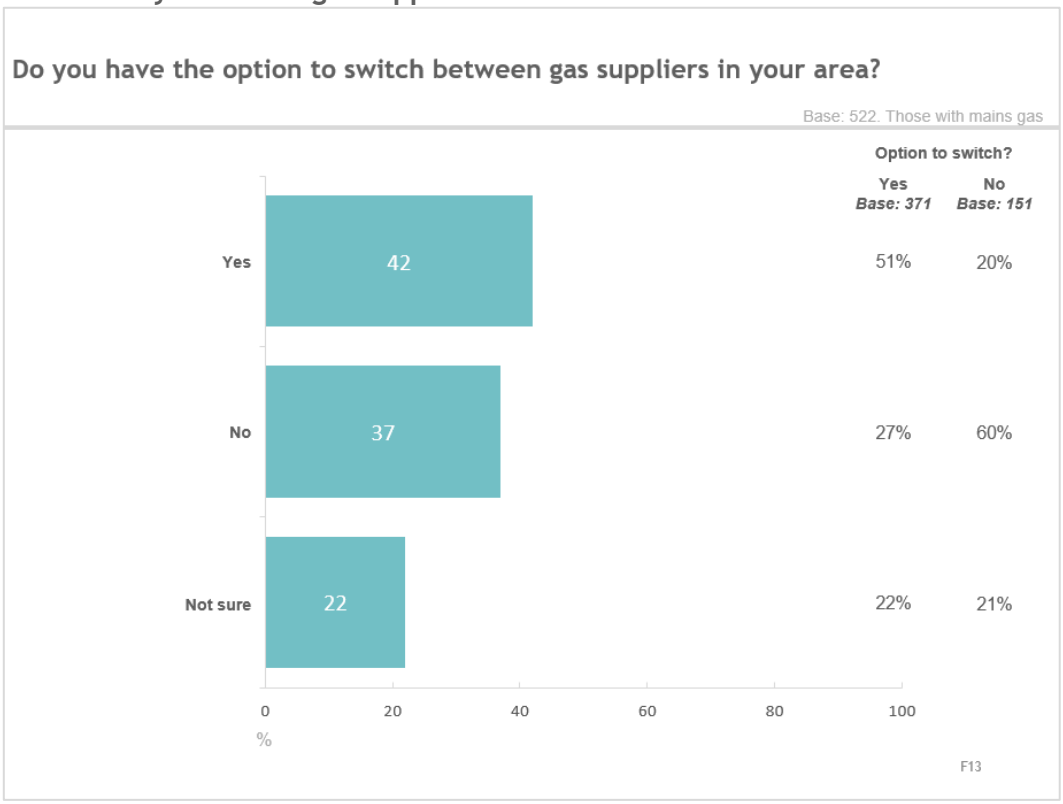
		Difficult	Neither	Easy	Not sure	*Total*
Overall	All *Base: 816*	11%	13%	72%	4%	*100%*
Age	Under 35 *Base: 152*	12%	12%	75%	1%	*100%*
	35-44 *Base: 195*	11%	9%	74%	6%	*100%*
	45-64 *Base: 304*	11%	13%	73%	3%	*100%*
	65 plus *Base: 159*	11%	20%	62%	6%	*100%*
Internet access	Yes *Base: 771*	11%	12%	73%	4%	*100%*
	No *Base: 45*	7%	36%	53%	4%	*100%*
Confidence using internet	Not confident *Base: 94*	16%	24%	54%	5%	*100%*
	Neither *Base: 108*	14%	19%	62%	6%	*100%*
	Confident *Base: 614*	10%	10%	76%	4%	*100%*

Gas

42% of respondents with gas heating stated that they had the option to switch between gas suppliers in their area, with 37% saying they do not have this option. It should also be noted that one fifth (22%) 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. 71% 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 20% of those who thought they could choose between gas suppliers are unable to.

Figure 8.6 Ability to switch gas supplier



Two fifths (41%) 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 (85%) were also significantly more likely to have compared gas deals than those who have not switched their energy supplier (35%) (see Table 8.7).

Figure 8.7 Incidence of comparing gas deal

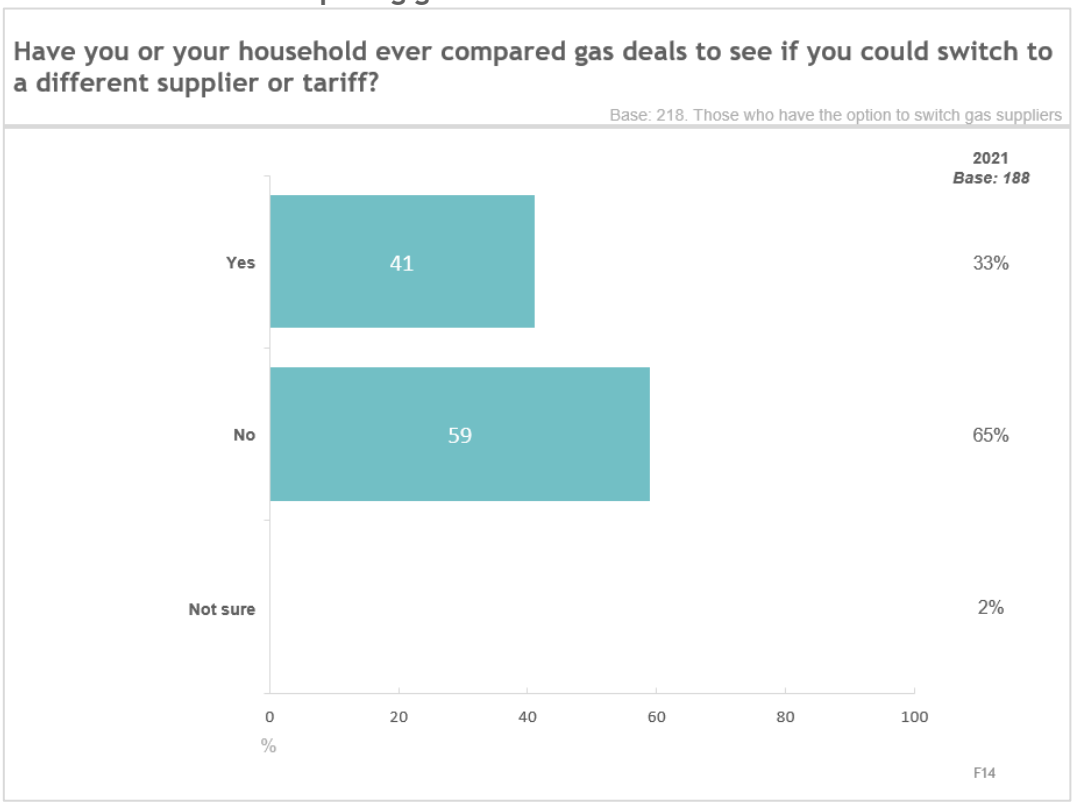


Table 8.7 Incidence of comparing gas deal by switching

		Yes	No	Not sure	*Total*
Overall	All *Base: 218*	41%	59%	0%	*100%*
Gas switching	Switchers *Base: 27*	85%	15%	-	*100%*
	Non-switchers *Base: 191*	35%	65%	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.

The incidence of comparing energy deals has increased from the 2021 Domestic Tracker. While two in five (40%) had compared their electricity deal in 2021, over half (54%) reported comparing their electricity deal in 2022. Similarly, two in five (41%) said that they had compared their gas deal in 2022, compared to one third (33%) in 2021 (see Figures 8.4 to 8.7).

Incidence of switching supplier

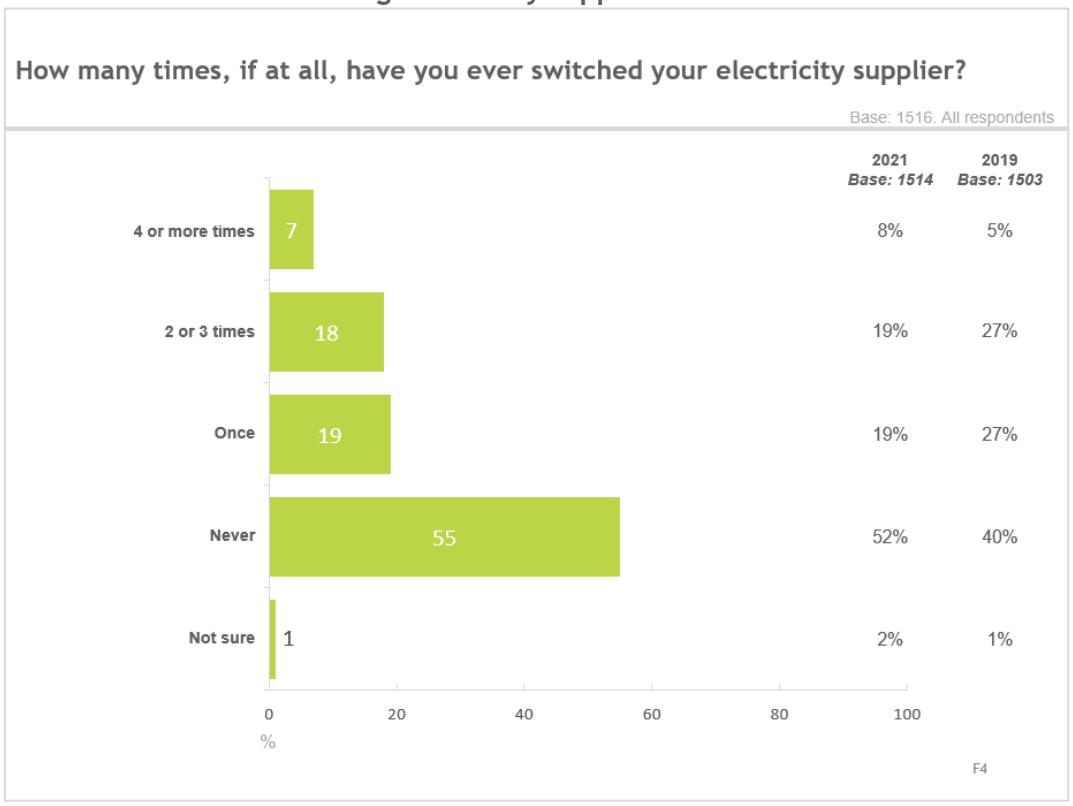
Respondents were asked to outline how many times, if at all, they had switched energy supplier.

Electricity

Over half (55%) of electricity customers reported that they have never switched their supplier. 19% said that they had switched once, and a further 18% had switched two or three times.

7% of respondents had switched at least four times (see Figure 8.8). Those who pay for their electricity using a prepayment meter (50%) were significantly the most likely to have switched at least once compared to those who pay using other methods (40%).

Figure 8.8 Incidence of switching electricity supplier



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

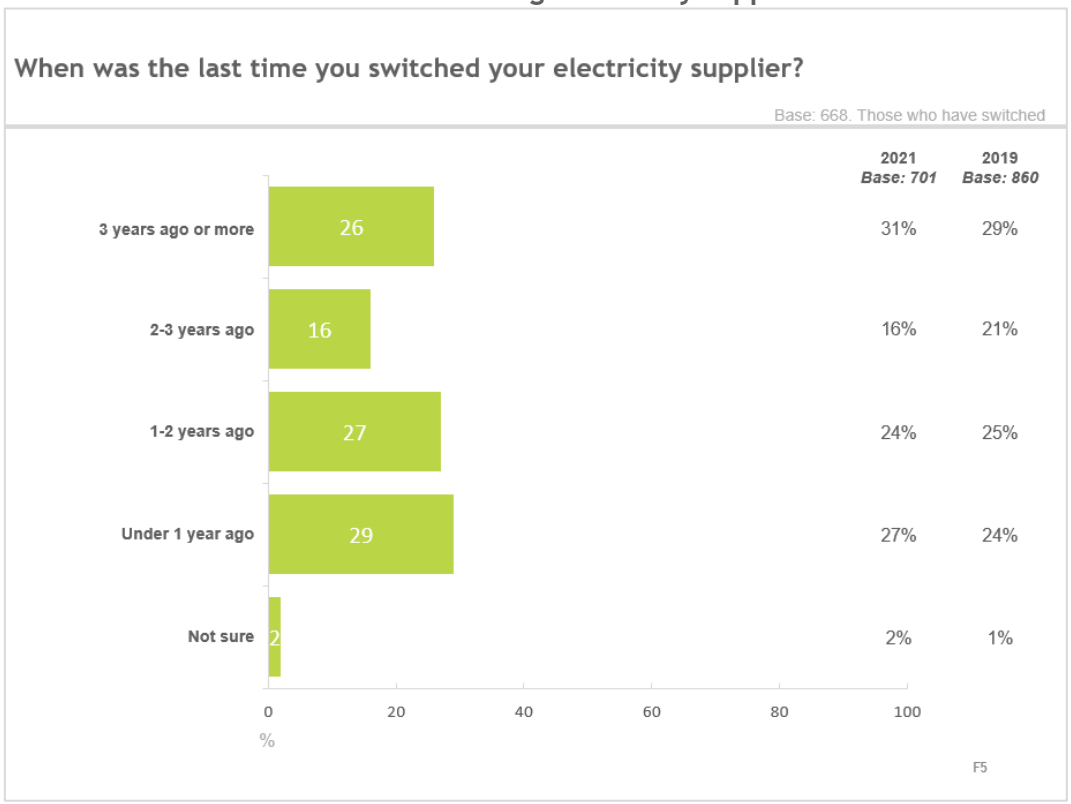
- Respondents aged 65 and over (65%) were more likely to have never switched when compared with 35 to 44 year olds (47%) and 45 to 64 year olds (51%);
- Over two thirds (69%) of respondents living in rural areas have never switched their electricity supplier, compared to just under half (47%) living in urban areas;
- 39% of respondents living in social housing had never switched, compared to 58% who owned their home and 51% who privately rent;
- Those living in the 2nd quintile of deprivation (65%) were more likely to have not switched their supplier than respondents living in the other four quintiles;
- 47% of respondents who had internet access reported they had switched at least once, compared to 16% without access. Similarly, 49% of those who were confident internet users have switched, compared to 29% who were not confident users; and
- Two thirds (66%) who have gone without electricity had switched their supplier, compared to two in five (41%) of those who had not experienced this.

Table 8.8 Incidence of switching electricity supplier by demographics, tenure, MDM quintile, internet access, electricity self-disconnection and payment method

		Never	Once	2 or 3 times	4 or more times	Don't know	*Total*
Overall	All *Base: 1516*	55%	19%	18%	7%	1%	*100%*
Age	Under 35 *Base: 257*	57%	23%	16%	4%	0%	*100%*
	35-44 *Base: 317*	47%	20%	21%	10%	2%	*100%*
	45-64 *Base: 548*	51%	18%	21%	10%	0%	*100%*
	65 plus *Base: 376*	65%	18%	12%	3%	2%	*100%*
Location	Urban *Base: 966*	47%	22%	21%	9%	1%	*100%*
	Rural *Base: 550*	69%	15%	11%	4%	1%	*100%*
Tenure	Own home *Base: 1180*	58%	20%	15%	7%	1%	*100%*
	Private renting *Base: 163*	51%	18%	24%	7%	1%	*100%*
	Social housing *Base: 160*	39%	18%	32%	10%	2%	*100%*
Internet access	Yes *Base: 1377*	52%	20%	19%	8%	1%	*100%*
	No *Base: 139*	83%	10%	5%	1%	1%	*100%*
Confidence using internet	Not confident *Base: 272*	70%	17%	9%	3%	1%	*100%*
	Neither *Base: 211*	57%	17%	21%	3%	2%	*100%*
	Confident *Base: 1033*	50%	20%	19%	9%	1%	*100%*
Electricity self-disconnection	Yes *Base: 138*	34%	17%	40%	9%	-	*100%*
	No *Base: 1372*	57%	19%	15%	7%	1%	*100%*
Electricity payment method	Prepayment meter *Base: 647*	49%	18%	24%	8%	0%	*100%*
	Credit meter *Base: 869*	59%	20%	13%	7%	2%	*100%*

Respondents who had switched electricity supplier were then asked when the last time they switched was. Almost three quarters (72%) had done so within the last three years, including 29% who had switched in the last year. A further 26% had switched at least three years ago.

Figure 8.9 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 (83%) 18 to 34 year olds were considered 'switchers', compared to 68% of 45 to 64 year olds and 68% of those aged 65 and over;
- Those living in urban areas (31%) were more likely to have switched in the last year than rural respondents (20%); and
- 72% of those who had access to the internet had switched in the last three years, compared to 41% of those without access.

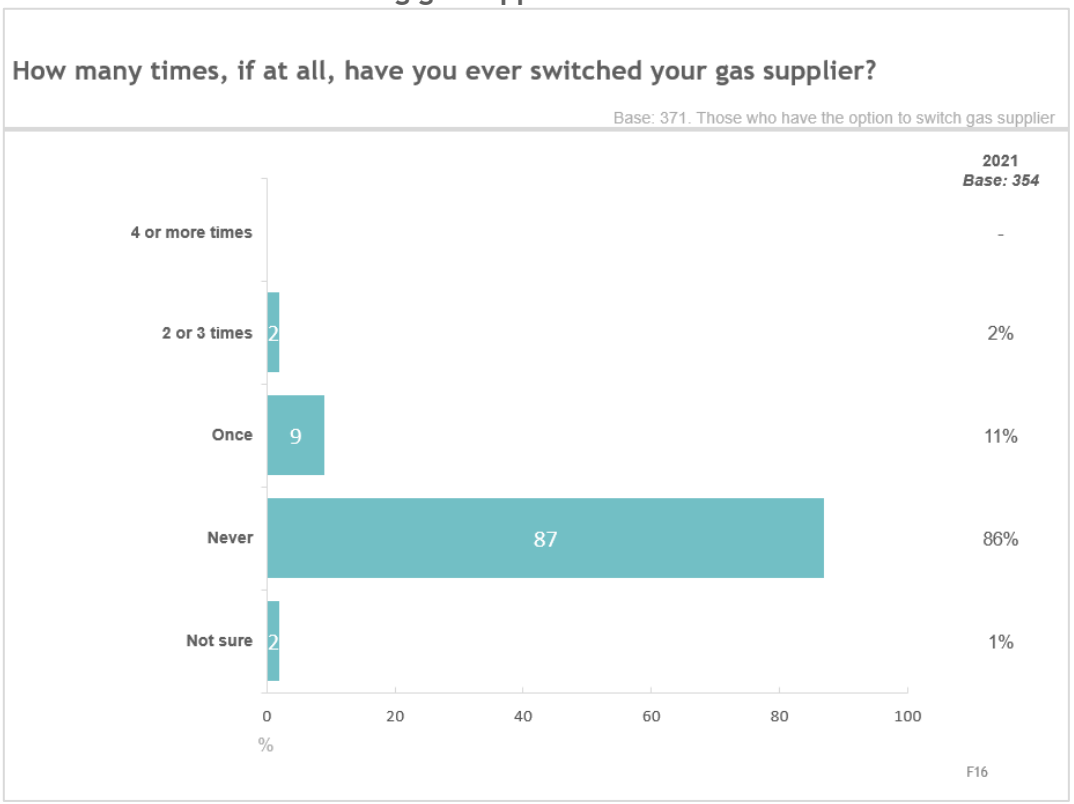
Table 8.9 Most recent instance of switching electricity supplier by demographics and internet access

		Under 1 year ago	1-2 years ago	2-3 years ago	3 years ago or more	Not sure	*Total*
Overall	All *Base: 668*	29%	27%	16%	26%	2%	*100%*
Age	Under 35 *Base: 109*	36%	28%	19%	17%	1%	*100%*
	35-44 *Base: 162*	30%	27%	14%	26%	2%	*100%*
	45-64 *Base: 265*	28%	26%	14%	29%	2%	*100%*
	65 plus *Base: 124*	20%	27%	21%	29%	3%	*100%*
Location	Urban *Base: 501*	31%	27%	15%	25%	2%	*100%*
	Rural *Base: 167*	20%	26%	21%	32%	1%	*100%*
Access to internet	Yes *Base: 646*	29%	27%	16%	26%	2%	*100%*
	No *Base: 22*	9%	18%	14%	41%	18%	*100%*

Gas

The majority (87%) of gas customers with the option to switch have never switched their supplier, while 11% have switched at least once.

Figure 8.10 Incidence of switching gas supplier



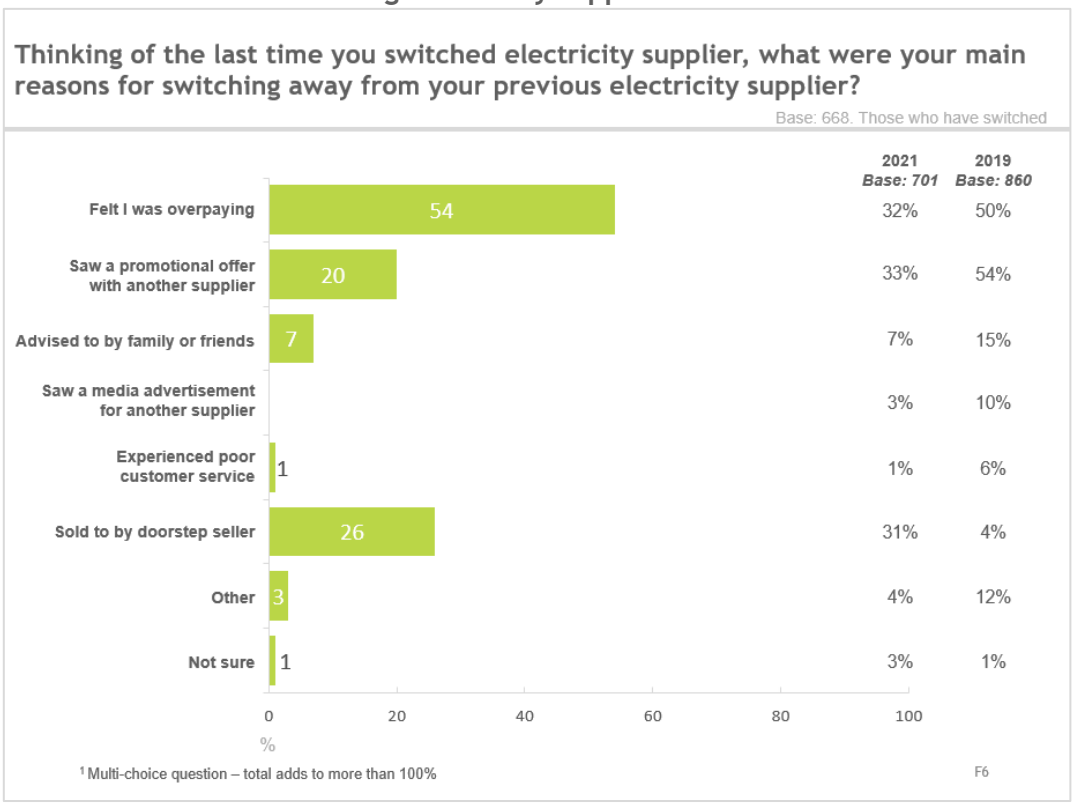
Of the 52 respondents who had switched their gas supplier, 32 had switched within the last three years, while 18 had switched at least three years ago.

Reasons for switching

Electricity

There were three main drivers for switching electricity supplier: i) reacting to feeling the respondent was paying too much; ii) reacting to a deal offered by a doorstep seller; and iii) reacting to a promotional offer from another supplier (see Figure 8.11). Over half (54%) felt that they were overpaying on their previous deal, while one quarter (26%) had been approached by a doorstep seller. One in five (20%) had seen a promotional offer with another supplier.

Figure 8.11 Reasons for switching electricity supplier



Gas

Gas customers have similar drivers for switching: i) reacting to feeling they were overpaying; ii) reacting to a promotional offer from another supplier; and iii) reacting to a deal offered by a doorstep seller. 39 of the 52 respondents who had switched gas supplier said they felt they were overpaying on their previous deal, and a further 6 respondents said it was because they saw a promotional offer from another supplier. 5 respondents reported they had been sold their deal by a doorstep seller.

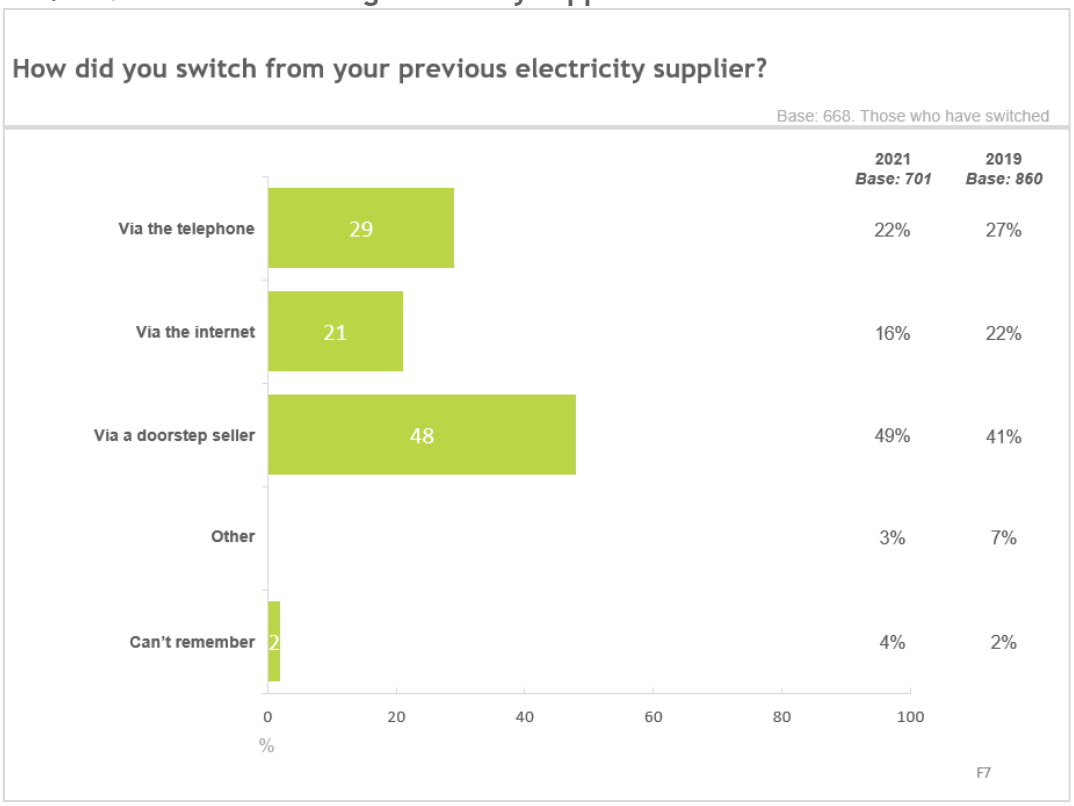
Although the drivers for switching electricity supplier remain consistent, there have been changes in the commonality of the reasons since 2021. 54% said that they felt they were overpaying on their previous deal, compared to 32% in 2021, whereas 20% had seen a promotional offer, compared to 33% in 2021. The prevalence of domestic consumers being influenced to switch by a doorstep seller has also decreased from 31% in 2021 to 26% in 2022 (see Figure 8.11).

Experience of switching

Electricity

The most common method used to switch electricity supplier was through a doorstep seller, with almost half (48%) saying this. Telephone (29%) was the next most common method, followed by using the internet (21%).

Figure 8.12 Method of switching electricity supplier



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

- Respondents in the C2DE socioeconomic group (56%, compared to 41% in the ABC1 group) were more likely to have switched after being approached by a doorstep seller, while those in the ABC1 group were more likely to have switched over the phone (34%, compared to 24% in the C2DE group);
- Those living in urban areas (51%) were more likely to have switched supplier through a doorstep seller than those living in rural areas (37%); and
- 60% of respondents who had gone without electricity used a doorstep seller to switch, compared to 46% who had not experienced this.

Table 8.10 Method of switching electricity supplier by demographics, location, electricity self-disconnection

		Telephone	Internet	Doorstep seller	Can't remember	*Total*
Overall	All *Base: 668*	29%	21%	48%	2%	*100%*
SEG	ABC1 *Base: 347*	34%	22%	41%	3%	*100%*
	C2DE *Base: 313*	24%	19%	56%	1%	*100%*
Location	Urban *Base: 501*	25%	21%	51%	3%	*100%*
	Rural *Base: 167*	42%	20%	37%	1%	*100%*
Electricity self-disconnection	Yes *Base: 91*	26%	13%	60%	-	*100%*
	No *Base: 573*	30%	22%	46%	2%	*100%*

Four in five (80%) respondents agreed that they received the deal they expected when they switched electricity supplier, compared to 8% who disagreed (see Figure 8.13).

76% had a positive experience (rating '4' or '5') when they switched supplier, with 5% reporting a negative experience (rating '1' or '2') (see Figure 8.14).

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.

Figure 8.13 Expected deal when switching electricity supplier

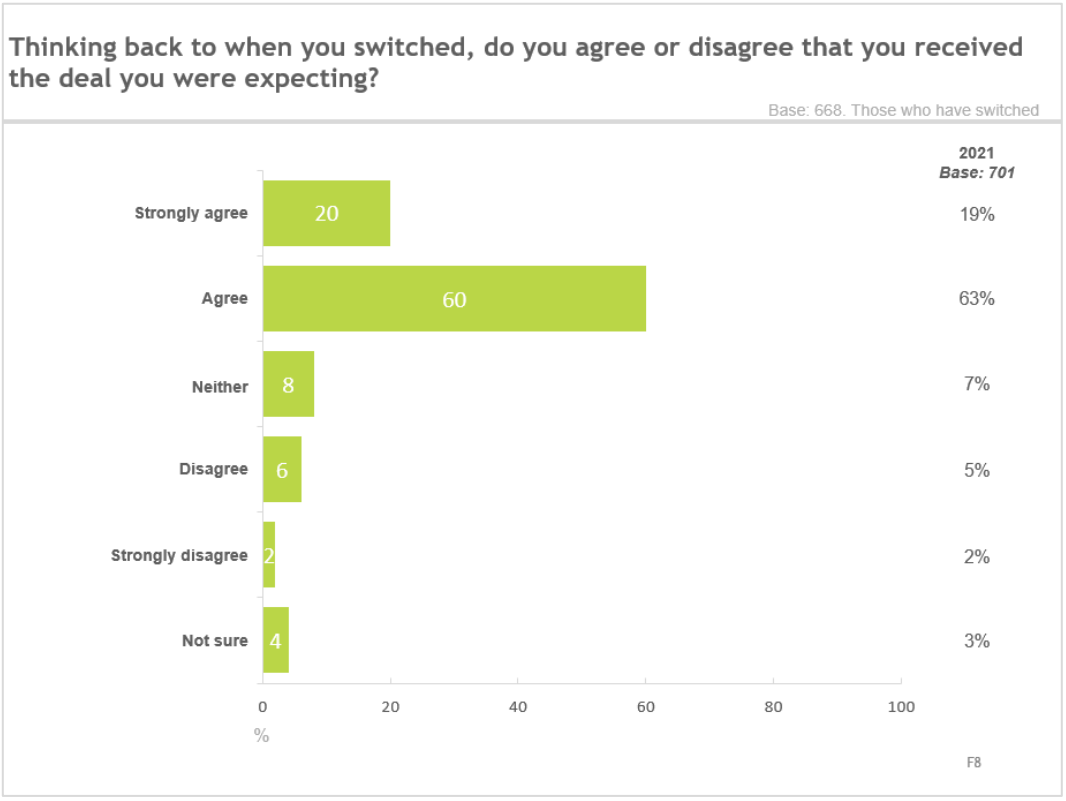
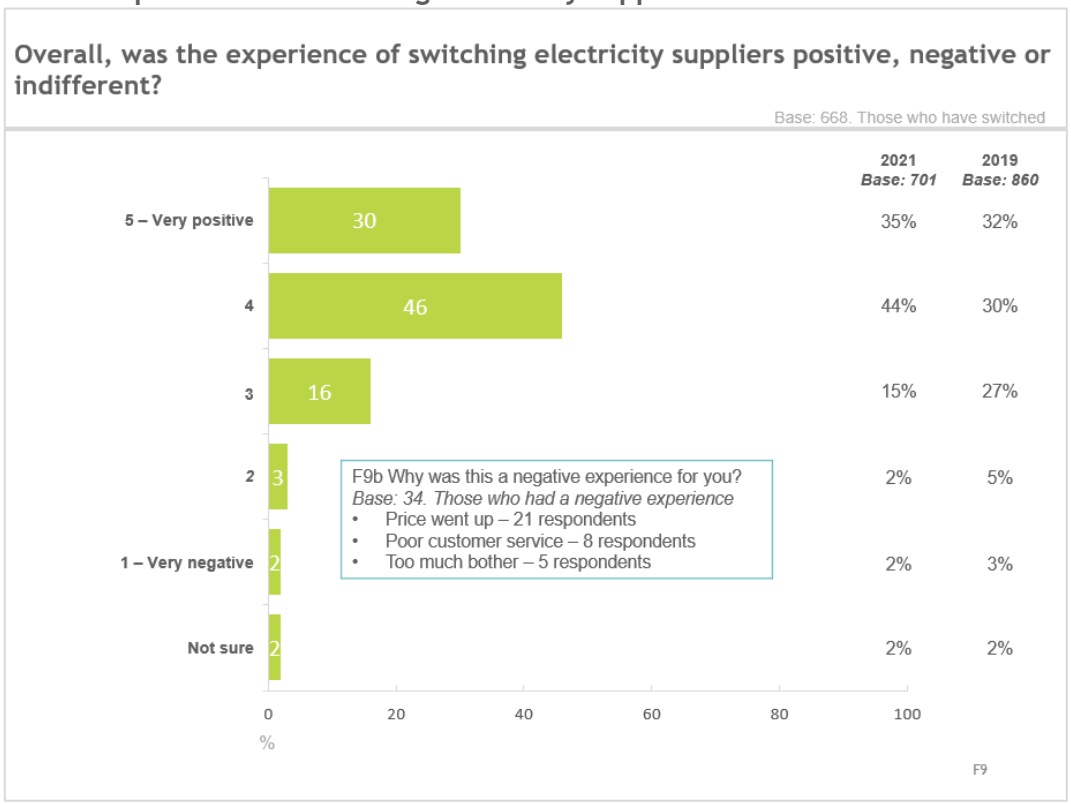


Figure 8.14 Experience of switching electricity supplier



Gas

19 of the 52 respondents who had switched their gas supplier did so via the internet. 16 did so over the telephone, and 15 respondents switched after being approached by a doorstep seller.

Almost all (39 respondents out of 52) who switched gas supplier agreed that they received the deal that they had expected.

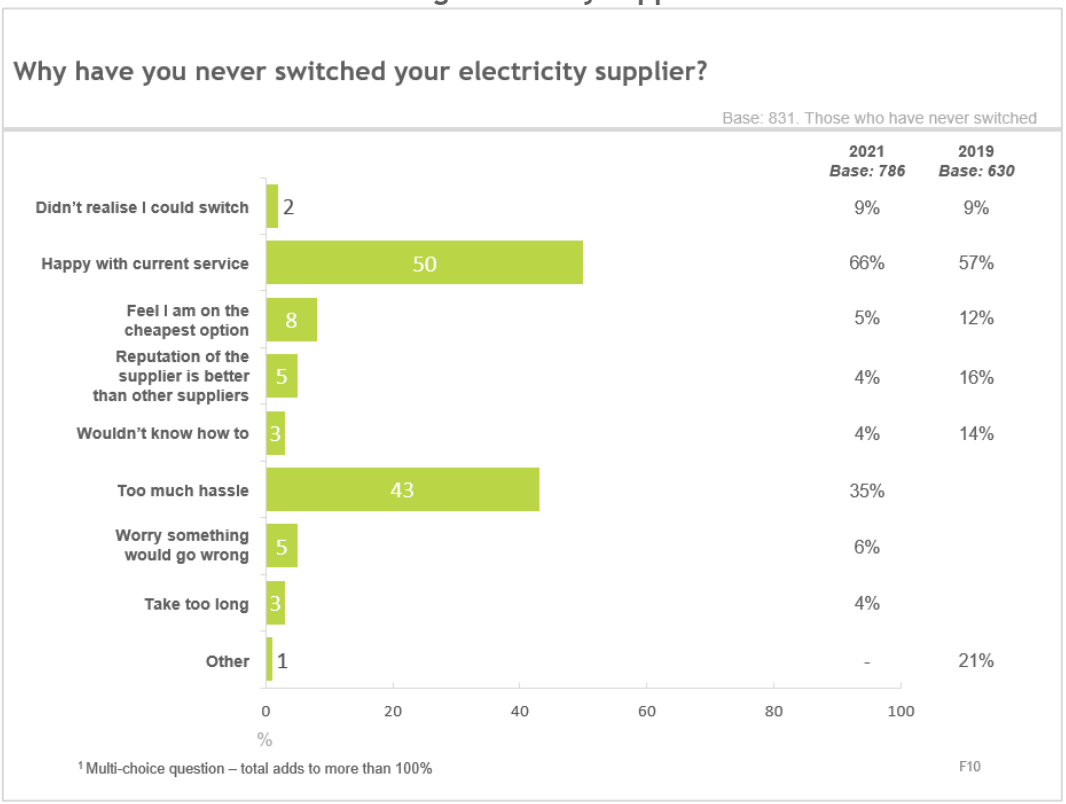
42 respondents had a positive (rating '4' or '5') experience of switching.

Reasons for not switching

Electricity

When asked why they had never switched electricity supplier, half (50%) said it was because they were happy with their current service, while a further 43% thought it would be too much hassle to switch. 2% of respondents were unaware that they could switch their electricity supplier (see Figure 8.15).

Figure 8.15 Reasons for not switching electricity supplier



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

- 57% of 65 plus year olds who had not switched said they were happy with their current service, compared to 44% of 18 to 34 year olds;
- C2DE respondents (3%) were more likely to say they did not realise they could switch compared to ABC1 respondents (1%), who were more likely to be concerned that it would take too long (4%, compared to 1% in the C2DE group);
- Respondents who own their home (46%) were more likely to be concerned about the inconvenience of switching when compared with those who privately rent (31%) and those living in social housing (29%); and
- Those living in the least deprived areas (9%) were more likely than those in the most deprived areas (1%) to worry that something may go wrong.

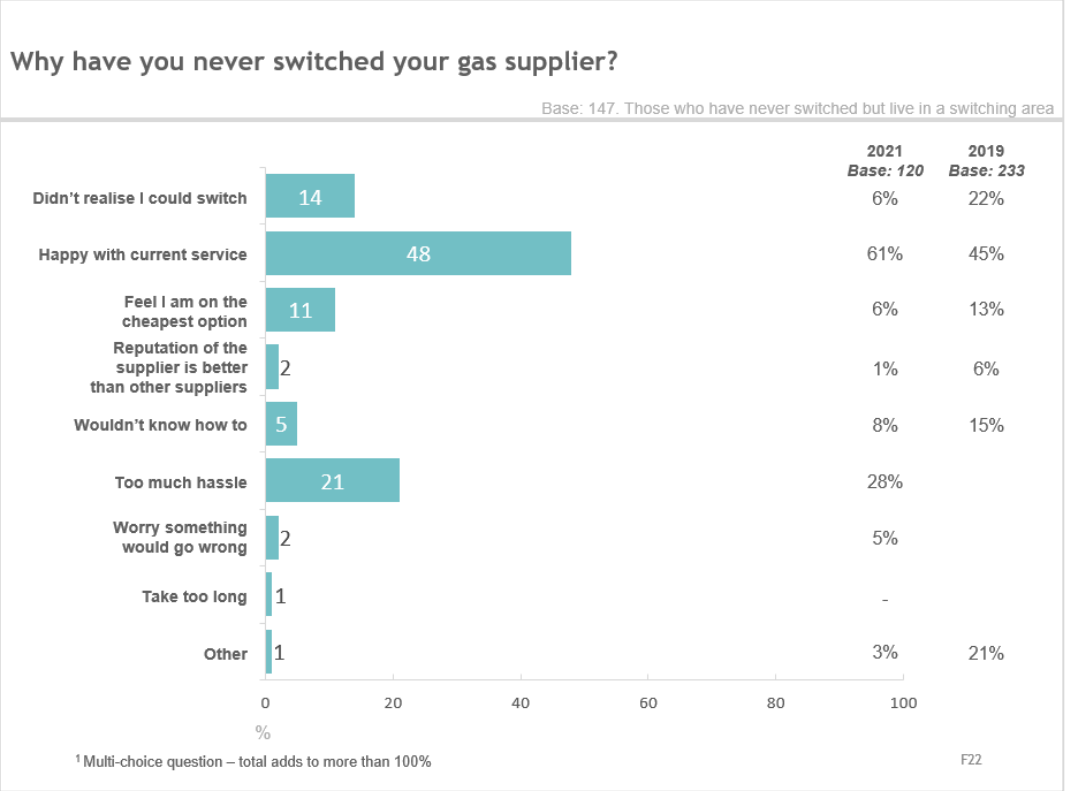
Table 8.11 Reasons for not switching electricity supplier by demographics, deprivation and payment method

		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: 831*	2%	50%	8%	5%	3%	43%	5%	3%
Age	Under 35 *Base: 147*	1%	44%	10%	3%	4%	41%	7%	3%
	35-44 *Base: 148*	3%	36%	7%	3%	1%	49%	3%	3%
	45-64 *Base: 281*	3%	53%	10%	6%	4%	39%	5%	1%
	65 plus *Base: 245*	1%	57%	7%	4%	2%	45%	5%	4%
SEG	ABC1 *Base: 392*	1%	46%	9%	4%	3%	46%	6%	4%
	C2DE *Base: 421*	3%	52%	8%	5%	3%	40%	4%	1%
Tenure	Own home *Base: 679*	2%	48%	9%	5%	3%	46%	5%	3%
	Private rented *Base: 83*	2%	58%	6%	1%	2%	31%	2%	-
	Social housing *Base: 62*	2%	55%	11%	8%	5%	29%	5%	-
Deprivation	1 – Most deprived *Base: 144*	1%	53%	10%	7%	1%	38%	1%	1%
	2 *Base: 192*	3%	49%	8%	6%	4%	44%	4%	4%
	3 *Base: 171*	4%	46%	7%	4%	4%	47%	3%	-
	4 *Base: 174*	2%	49%	8%	5%	3%	44%	7%	3%
	5 – Least deprived *Base: 150*	2%	53%	9%	3%	2%	40%	9%	5%

Gas

Gas customers who had the option to switch gave similar reasons for not switching supplier as electricity customers, with 48% saying they were happy with their current service and 21% believing it would be too much hassle to switch. 14% also claimed that they did not know they could switch their supplier, while 5% were unsure how to go about switching (see Figure 8.16).

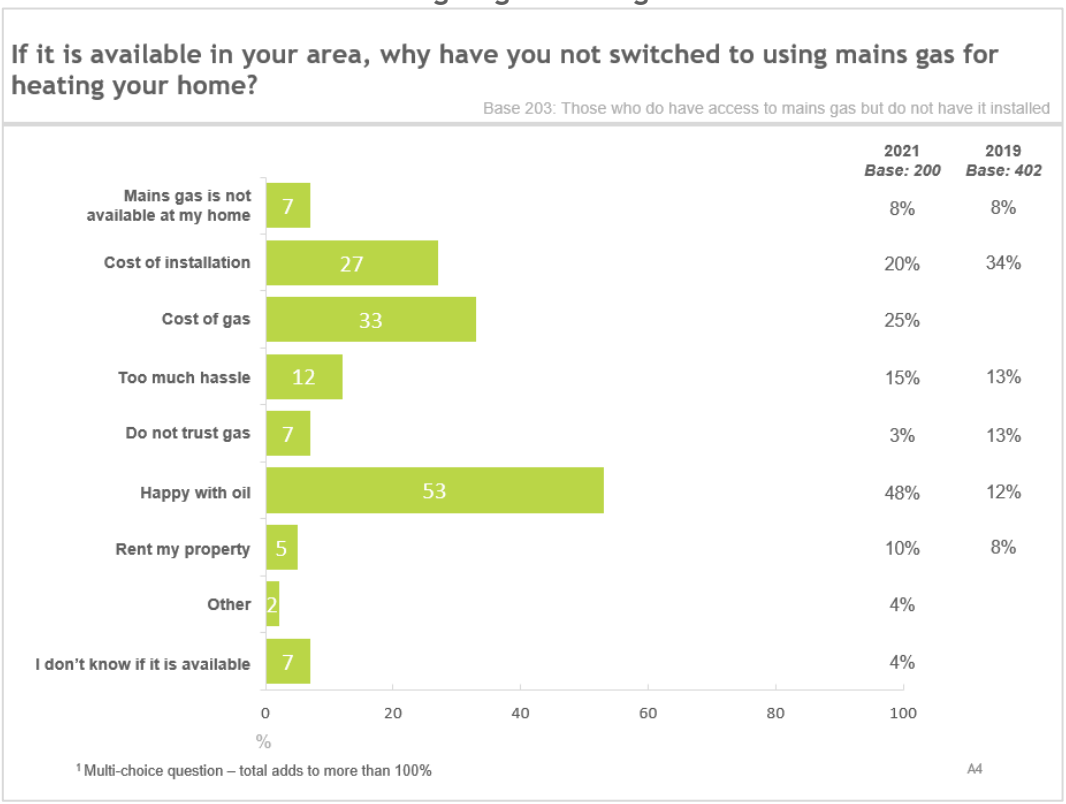
Figure 8.16 Reasons for not switching gas supplier



Findings from the 2022 study show that while the number of respondents saying they are happy with their current service has decreased, this still remains the most common reason for not switching electricity (50%, 66% in 2021) or gas (48%, 61% in 2021) suppliers. In contrast, the number of respondents who believe it would be too much hassle to switch their electricity supplier has increased (43%, compared to 35% in 2021). (see Figures 8.15 and 8.16).

20% of respondents confirmed that they had access to gas in their area but did not have it installed in their home. Half (53%) of these respondents said the reason for this was because they were content with oil, while 33% and 27% respectively were concerned about the cost of gas and installation. 7% believed that mains gas is not available at their particular house and 7% did not know if gas was available at their home (see Figure 8.18).

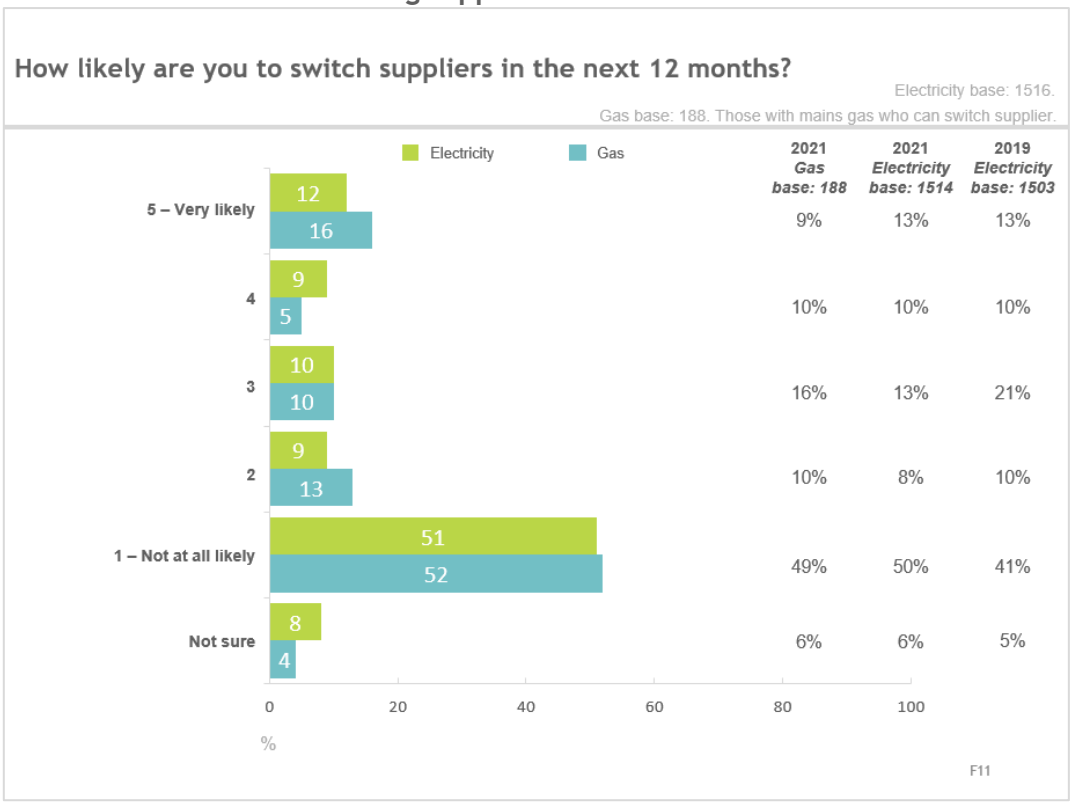
Figure 8.18 Reasons for not switching to gas heating



Likelihood of switching in the future

Just over one fifth (21%) of electricity customers and 21% of gas customers who are able to switch suppliers said that they were quite or very likely to switch their supplier in the next 12 months.

Figure 8.19 Likelihood of switching supplier



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

- 26% 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 (23%) were more likely to show intent to switch electricity supplier than rural respondents (18%);
- One quarter (23%) of those with internet access and 26% of confident internet users said they were likely to switch electricity supplier, compared to 7% without access and 10% who were not confident users; and
- Electricity switchers were more likely to say they would switch again in the next year. 37% of electricity switchers said they were 'quite' or 'very' likely to switch, compared to 14% of electricity customers who had not switched.

Table 8.12 Likelihood of switching electricity supplier by demographics, location, and internet access

		Not likely	Neither	Likely	Don't know	*Total*
Overall	All *Base: 1516*	61%	10%	21%	8%	*100%*
Age	Under 35 *Base: 257*	55%	18%	23%	5%	*100%*
	35-44 *Base: 317*	50%	11%	26%	13%	*100%*
	45-64 *Base: 548*	59%	9%	25%	6%	*100%*
	65 plus *Base: 376*	74%	7%	11%	7%	*100%*
Location	Urban *Base: 966*	59%	10%	23%	8%	*100%*
	Rural *Base: 550*	64%	11%	18%	7%	*100%*
Internet access	Yes *Base: 1377*	58%	11%	23%	8%	*100%*
	No *Base: 139*	83%	4%	7%	6%	*100%*
Confidence using internet	Not confident *Base: 272*	79%	5%	10%	7%	*100%*
	Neither *Base: 211*	59%	15%	15%	11%	*100%*
	Confident *Base: 1033*	56%	11%	26%	7%	*100%*
Electricity switching	Switchers *Base: 478*	36%	14%	37%	13%	*100%*
	Non-switchers *Base: 1038*	72%	8%	14%	5%	*100%*

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

9. Payment difficulties

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

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

Key findings

- 56% of domestic electricity consumers and 59% of gas consumers reported that they are always able to keep up with their bills. This represents a notable decrease from 85% and 84% in the 2021 Tracker. The proportion of consumers who sometimes struggle to pay their bills has increased from 13% to 39% of electricity consumers and from 15% to 33% of gas consumers. The proportions who often or always struggle to pay their bills have also increased from 1% to 4% for electricity consumers and from 0% to 7% for gas consumers.
- 18% of respondents with a prepayment meter reported that they had run out of money on their meter and had gone without electricity over the past year, compared to 2% of those with a credit meter (i.e. those who pay by direct debit or on receipt of bill) who were unable to afford electricity. These figures are similar to those obtained in 2021, in which 18% with a prepayment meter had gone without electricity, compared to 1% with a credit meter.
- 11% and 10% reported that they have had to delay or go without other essentials so that they could pay for electricity and gas respectively. In the 2021 Tracker it was 4% for electricity and 3% for gas.
- 85% of respondents have reduced their electricity usage over the last year, while 6% had borrowed money to pay their electricity bills. This represents a large increase from the 2021 Tracker, in which 34% had reduced electricity usage and 2% had borrowed money. This was also true for gas customers, with 87% reducing their usage (compared to 28% in 2021) and 8% borrowing money to pay their bill (3% in 2021).

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). Over half (56%) of respondents reported that they never struggle to pay their electricity bills. 39% said they sometimes struggle to pay their bills but usually were able to keep on top of them, while 4% stated that they were often or always behind in their payments. Those who have a prepayment meter for electricity (48%) were more likely to say they sometimes struggle to pay their bills compared to those with a credit meter who pay using other methods (32%).

Three in five (59%) gas consumers also stated that they never struggle to pay their gas bills and one third (33%) said that they sometimes struggle but were able to manage their bills, with customers on a prepayment meter (38%, compared to 26% with a credit meter) again

more likely to say they sometimes struggle to pay their bills. 7% reported that they are often or always behind in paying their bills (see Figure 9.2).

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

- 47% of those aged 18 to 34 reported that they sometimes struggle to pay their electricity bill, compared to 30% aged 65 and over;
- Respondents in the C2DE SEG (45%) were more likely to say they sometimes struggle to pay electricity bills than those in the ABC1 group (33%);
- 47% of those living in the most deprived areas sometimes struggled to pay electricity bills, compared to 31% in the least deprived areas; and
- 59% of those who have had to go without electricity reported that they sometimes struggle to pay their bills, with a further 20% saying they are often behind in their payments. This compares to 37% and 2% of those who have not gone without electricity respectively.

Figure 9.1 Ability to pay electricity bills

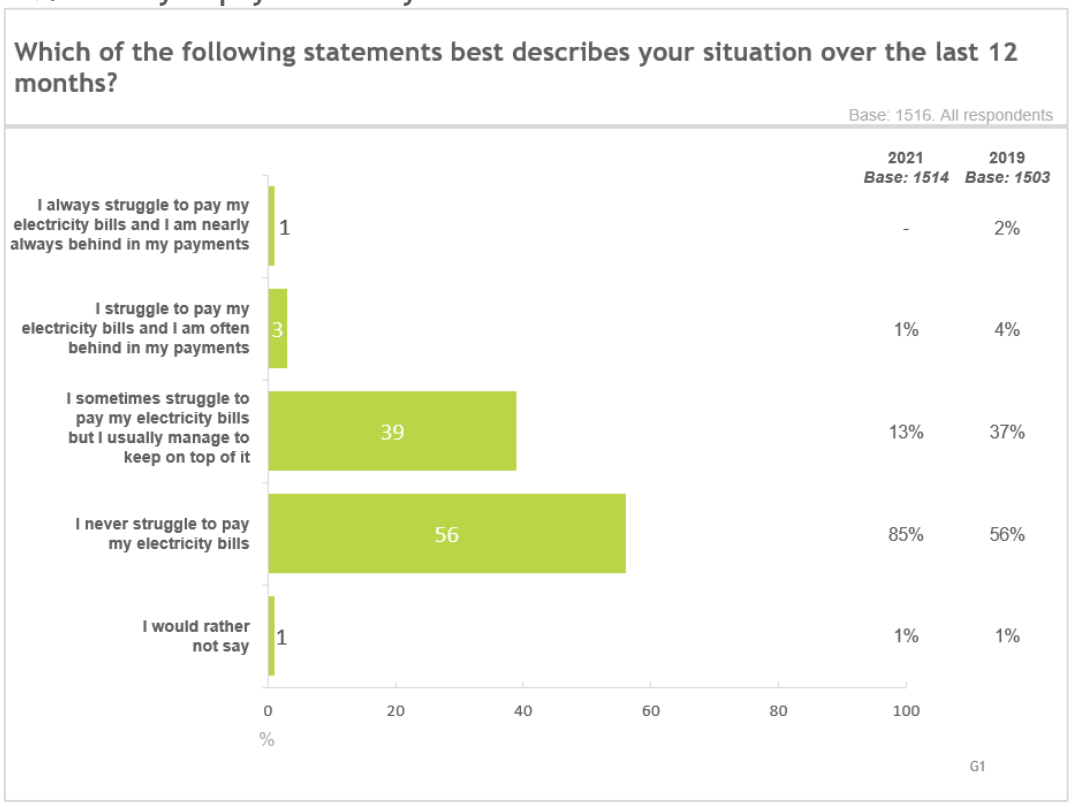


Table 9.1 Ability to pay electricity bills by demographics, deprivation, electricity self-disconnection and payment method

		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: 1516*	56%	39%	3%	1%	1%	*100%*
Age	Under 35 *Base: 257*	47%	47%	5%	0%	1%	*100%*
	35-44 *Base: 317*	51%	43%	4%	1%	2%	*100%*
	45-64 *Base: 548*	55%	40%	4%	1%	0%	*100%*
	65 plus *Base: 376*	66%	30%	2%	0%	2%	*100%*
SEG	ABC1 *Base: 743*	63%	33%	3%	0%	1%	*100%*
	C2DE *Base: 747*	48%	45%	5%	1%	1%	*100%*
MDM Quintile	1 - Most deprived *Base: 287*	44%	47%	8%	0%	1%	*100%*
	2 *Base: 297*	54%	41%	3%	1%	1%	*100%*
	3 *Base: 310*	56%	43%	1%	0%	-	*100%*
	4 *Base: 315*	59%	36%	2%	1%	2%	*100%*
	5 - Least deprived *Base: 307*	65%	31%	3%	0%	2%	*100%*
Electricity self-disconnection	Yes *Base: 138*	20%	59%	20%	1%	-	*100%*
	No *Base: 1372*	59%	37%	2%	0%	1%	*100%*
Electricity payment method	Prepayment meter *Base: 647*	45%	48%	6%	0%	1%	*100%*
	Credit meter *Base: 869*	64%	32%	2%	1%	1%	*100%*

Figure 9.2 Ability to pay gas bills

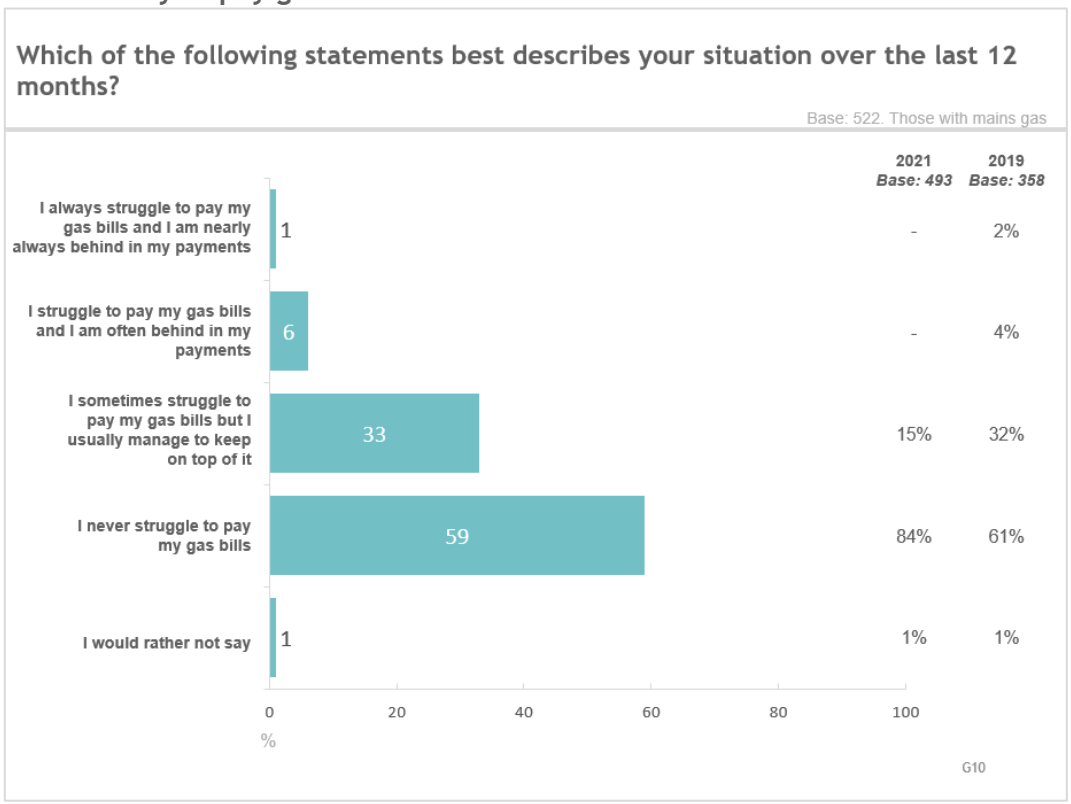


Table 9.2 Ability to pay gas bills by payment method

		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: 522*	59%	33%	6%	1%	1%	*100%*
Gas payment method	Prepayment meter *Base: 310*	53%	38%	8%	1%	1%	*100%*
	Credit meter *Base: 212*	68%	26%	3%	-	2%	*100%*

The number of respondents who reported they sometimes struggle to pay their electricity bill has increased from the 2021 Domestic Tracker to similar levels seen in 2019 (39%, compared to 13% in 2021 and 37% in 2019) (see Figure 9.1). This is also true for gas customers, with one third (33%) saying that they sometimes struggle, compared to 15% in 2021 and 32% in 2019 (see Figure 9.2).

Reasons for being without energy

Electricity

Almost all (97%) respondents with a credit meter said that they had never gone without electricity that they needed because of the cost, with 2% saying this occurred a few times a year or once a month (see Figure 7.3). Respondents with an electricity prepayment meter were more likely than credit customers to have gone without electricity in the past 12 months. 11% had occasionally gone without electricity, 5% said this happened around once a month and 2% mentioned that they go without electricity most weeks (see Figure 9.4).

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

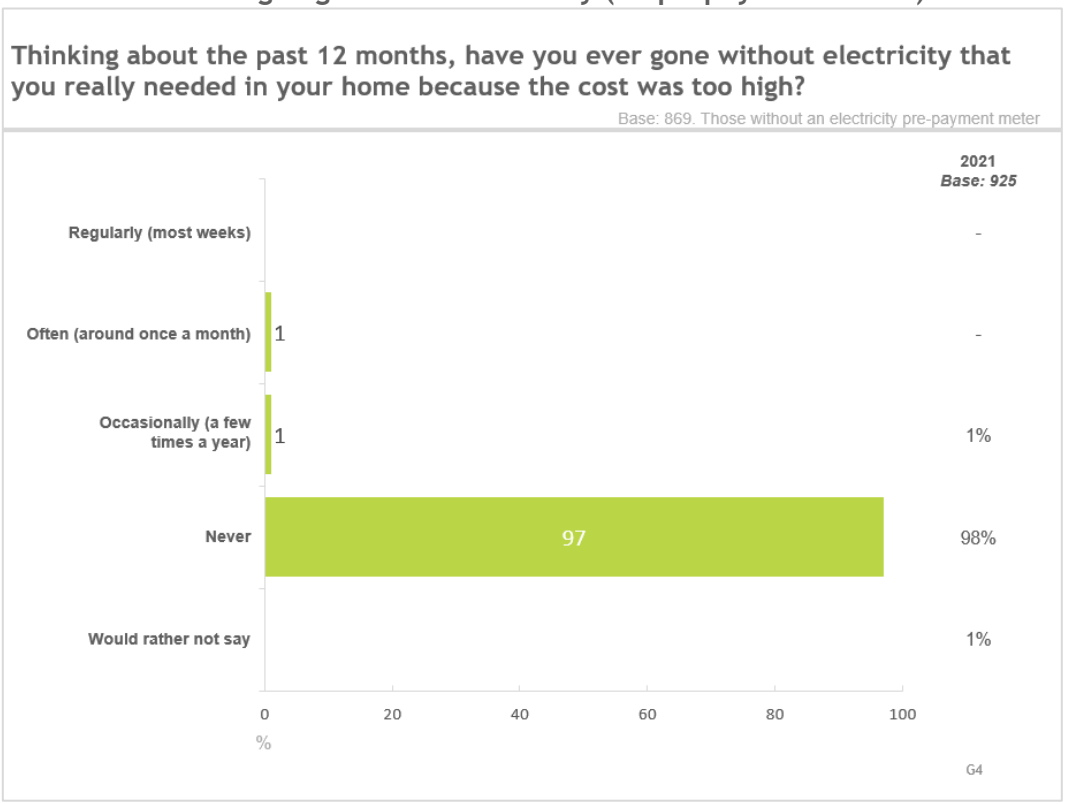
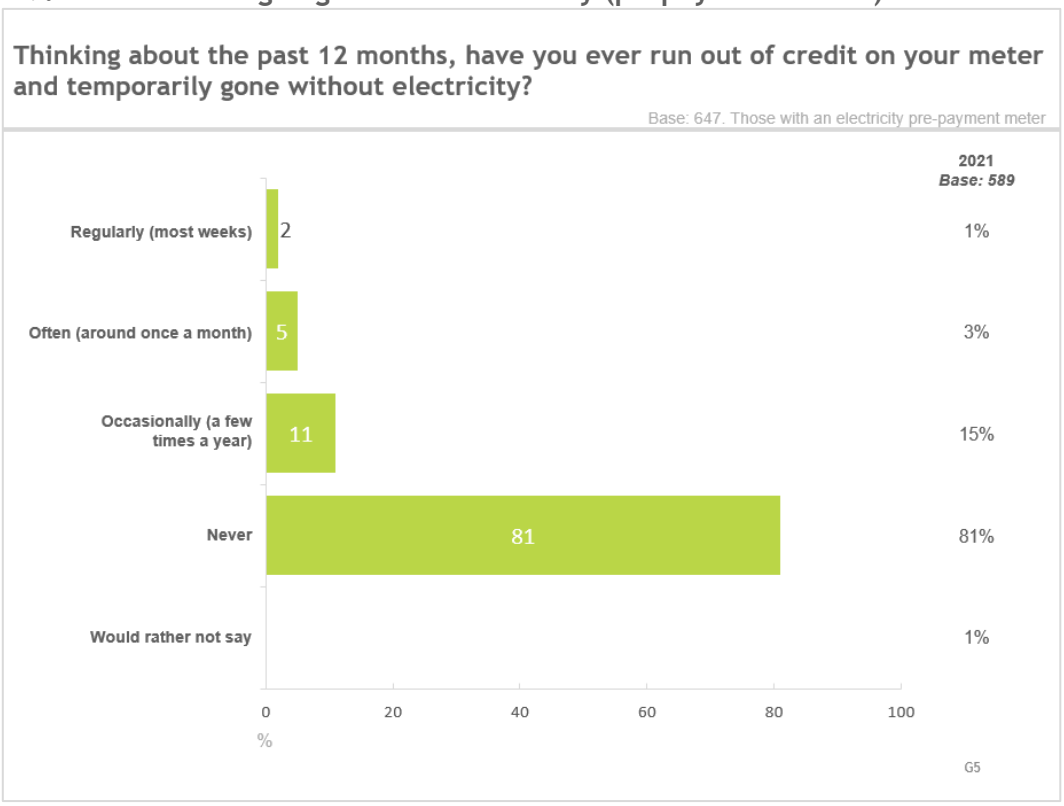
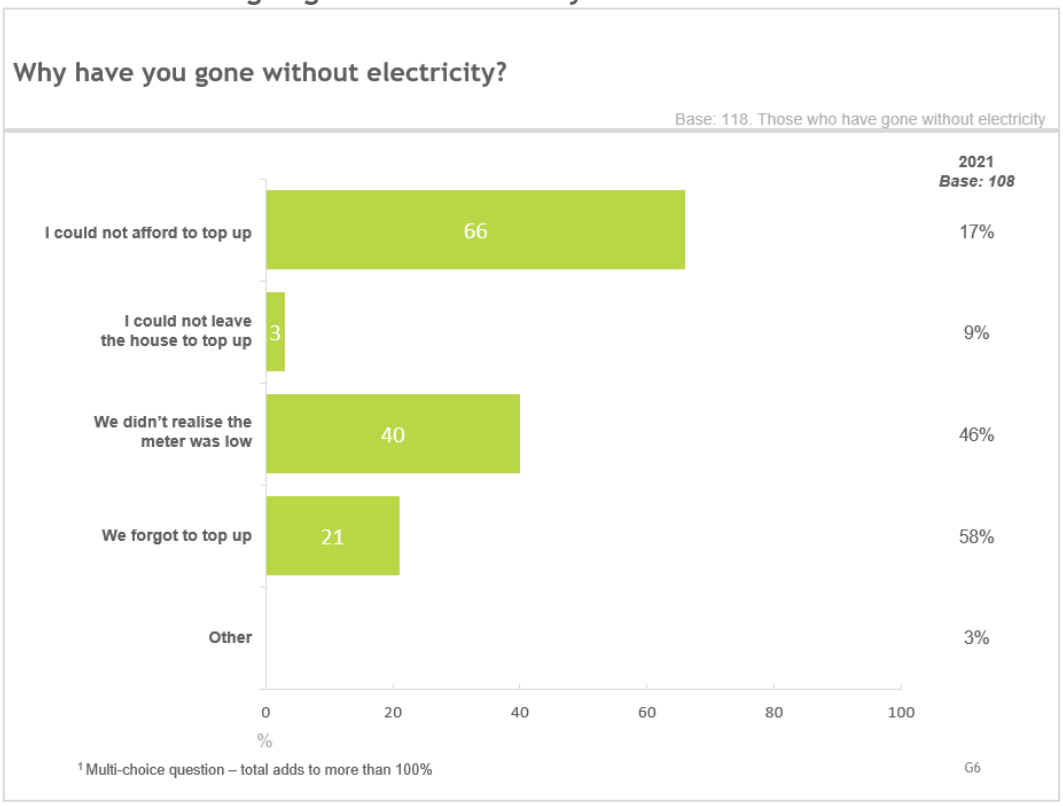


Figure 9.4 Incidence of going without electricity (prepayment meter)



Of those respondents with a prepayment meter who had run out of credit on the meter and temporarily gone without electricity, 66% said that they could not afford to top up, and 40% did not realise their meter was low. One fifth (21%) mentioned that they had forgot to top up (see Figure 9.5).

Figure 9.5 Reasons for going without electricity



All respondents were asked if they had gone without or had delayed getting other essentials so that they would be able to pay for electricity. While the majority (89%) confirmed that this was not something they had to do, 4% reported that they had to do this between one and three times a year, and 3% had to do this less than once a month. A further 4% had to do this at least once a month, including 1% who reported it occurring more than once a week (see Figure 9.6). Over half (53%) of those who had gone without electricity or ran out of credit have had to delay buying essentials, compared to 6% who have not experienced this.

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

- 16% of 18 to 34 year olds, compared to 6% of those aged 65 and over;
- 14% of C2DE respondents had gone without getting other essentials in the last 12 months, compared to 7% of ABC1 respondents; and
- 13% of those in the high or medium vulnerability groups, compared to 8% in the non-vulnerable group; and
- 16% of those with a prepayment meter for electricity, compared to 5% with a credit meter.

Figure 9.6 Incidence of delaying getting essentials to pay for electricity

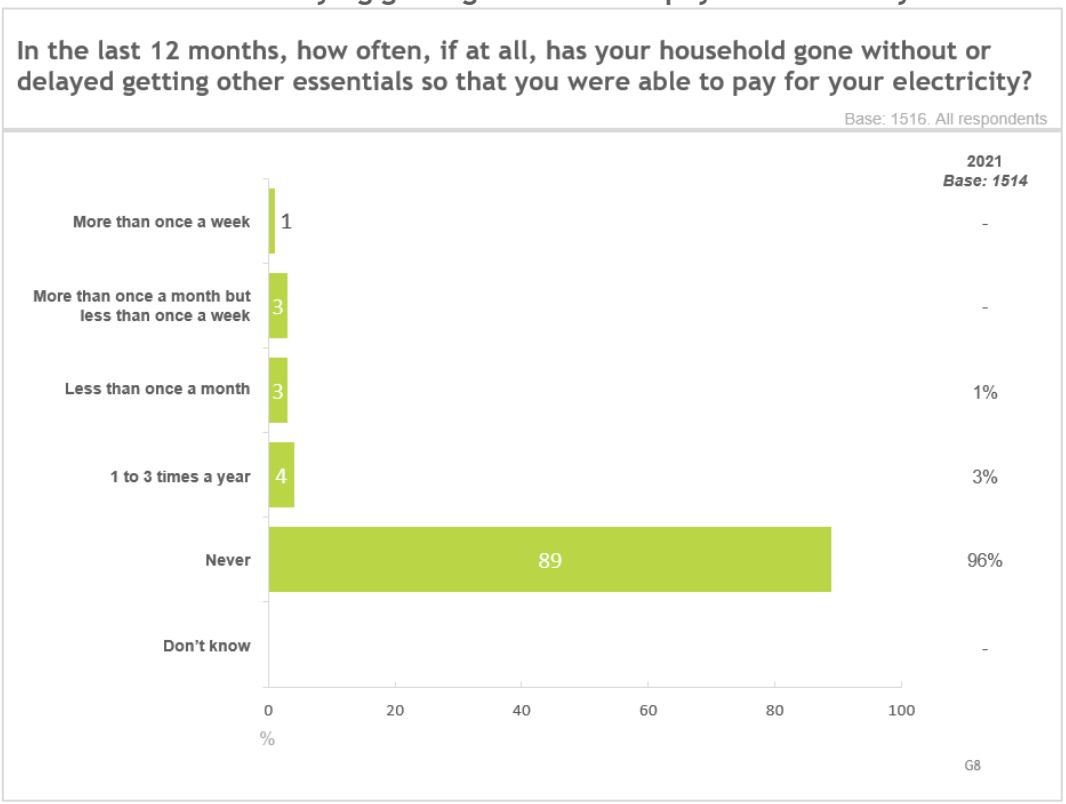
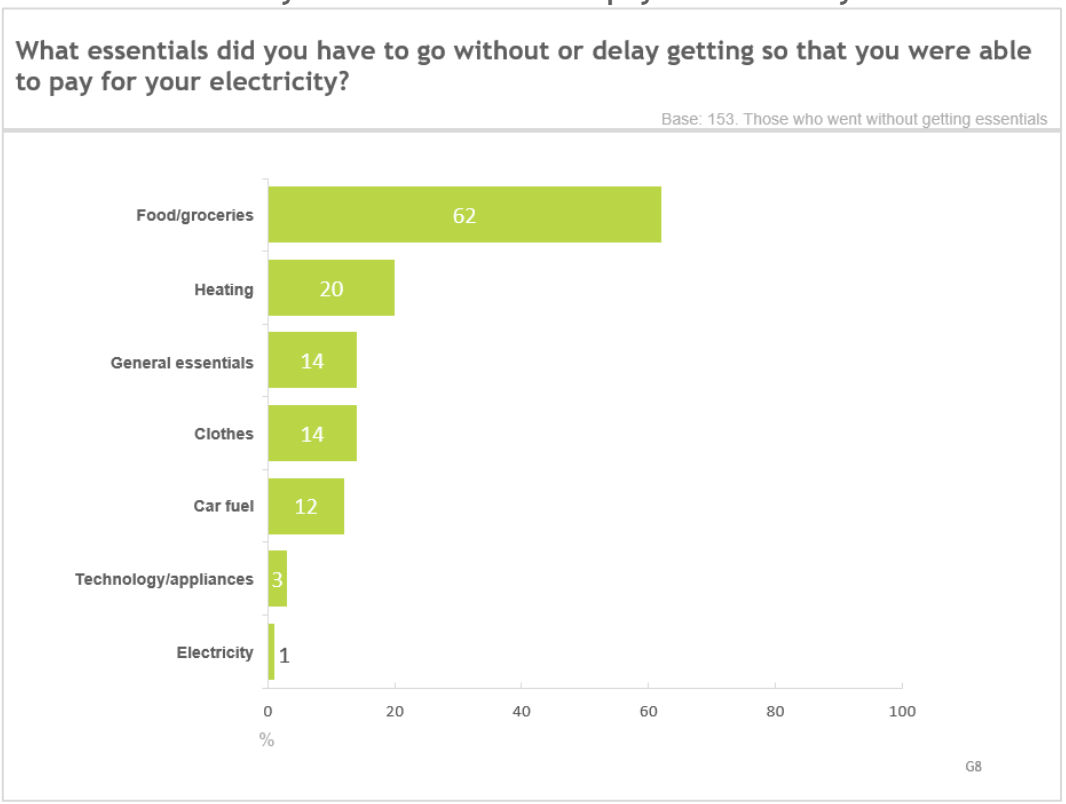


Table 9.3 Incidence of delaying getting essentials to pay for electricity by demographics, vulnerability, electricity self-disconnection and electricity payment method

		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: 1516*	89%	4%	3%	3%	1%	0%	*100%*
Age	Under 35 *Base: 257*	84%	4%	3%	7%	2%	-	*100%*
	35-44 *Base: 317*	91%	3%	3%	2%	1%	0%	*100%*
	45-64 *Base: 548*	89%	5%	3%	2%	1%	1%	*100%*
	65 plus *Base: 376*	93%	3%	2%	1%	0%	1%	*100%*
SEG	ABC1 *Base: 743*	94%	2%	2%	2%	1%	0%	*100%*
	C2DE *Base: 747*	86%	6%	4%	3%	1%	0%	*100%*
Vulnerability	High/medium vulnerability *Base: 610*	86%	5%	3%	4%	1%	0%	*100%*
	Low vulnerability *Base: 109*	93%	-	2%	4%	2%	-	*100%*
	Not vulnerable *Base: 797*	92%	3%	2%	2%	1%	1%	*100%*
Electricity self-disconnection	Yes *Base: 138*	46%	17%	13%	17%	5%	1%	*100%*
	No *Base: 1372*	94%	2%	2%	1%	1%	-	*100%*
Electricity payment method	Prepayment meter *Base: 647*	84%	6%	4%	5%	1%	0%	*100%*
	Credit meter *Base: 869*	94%	2%	1%	1%	1%	1%	*100%*

Of those who had reported going without essentials, 62% said they had not bought food or groceries, while 20% did not pay for heating. A further 14% did not purchase new clothes, and 12% did not refuel their car (see Figure 9.7).

Figure 9.7 Essentials delayed or went without to pay for electricity



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, 15% reported having occasionally run out of credit (see Figure 7.8).

Figure 9.8 Incidence of going without gas (no prepayment meter)

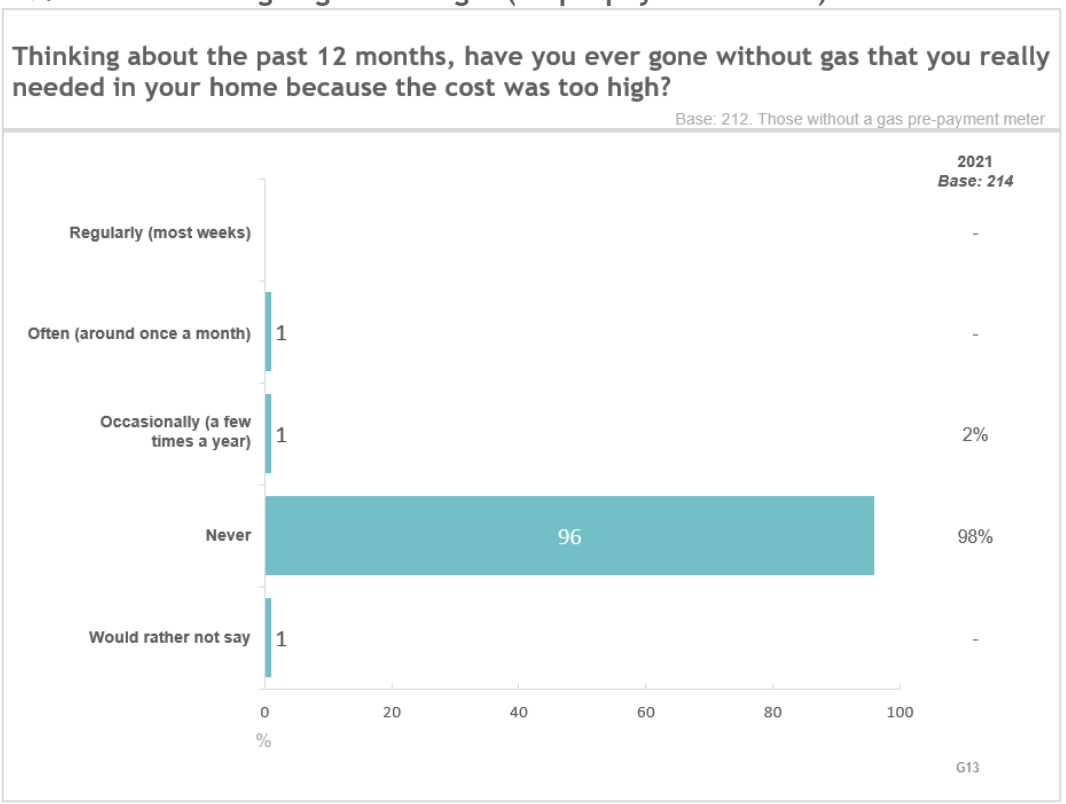
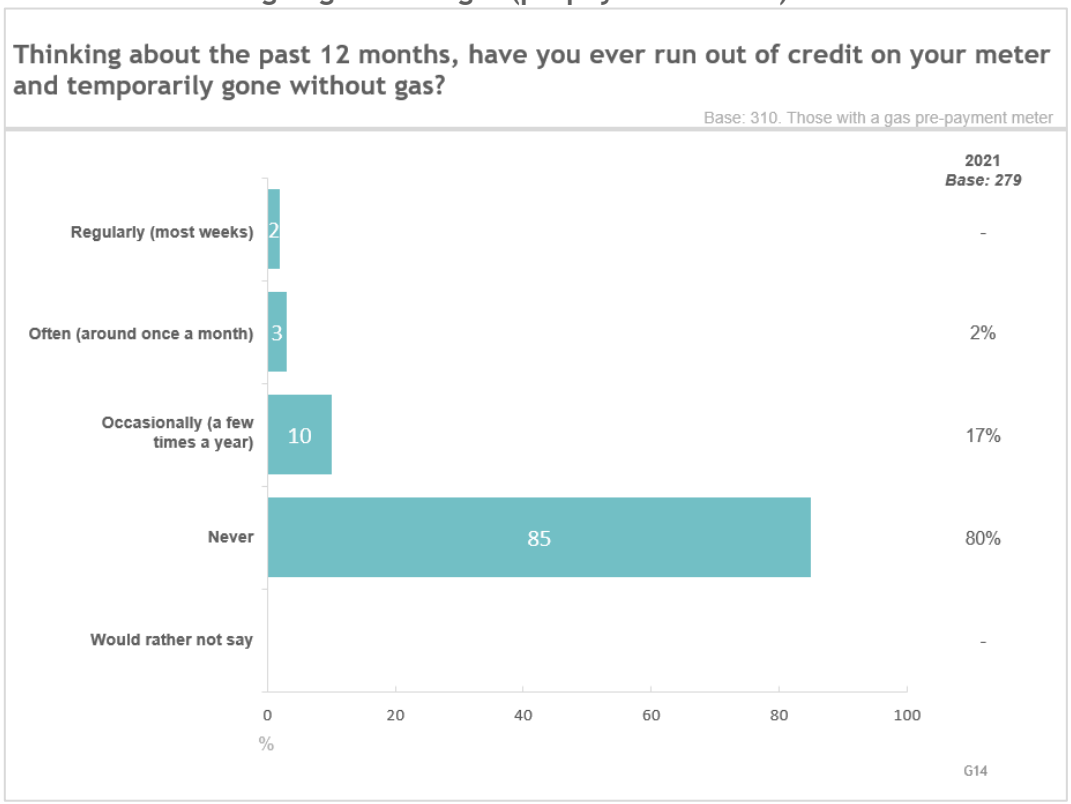
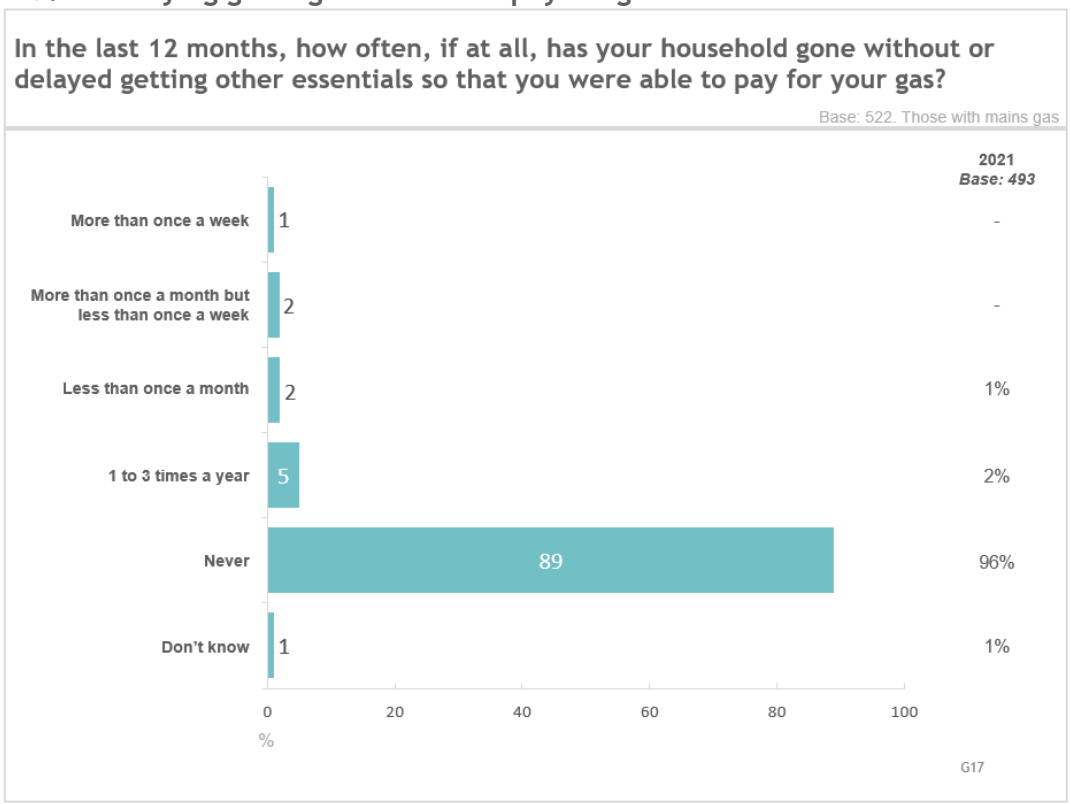


Figure 9.9 Incidence of going without gas (prepayment meter)



Those with mains gas were asked how often their household had gone without or delayed getting other essentials so that they could pay for their gas. 10% confirmed that this was the case for them on at least one occasion in the last 12 months, including 1% who said it happened more than once a week (see Figure 9.10).

Figure 9.10 Delaying getting essentials to pay for gas



The proportion of respondents who have had to go without or delay getting other essentials to pay for electricity has increased from 4% in 2021 to 11%. A similar pattern can also be observed with gas customers, with 3% reporting they had gone without getting essentials at least once to pay for their gas in the 2021 Tracker, compared to 10% in 2022 (see Figures 9.6 and 9.10).

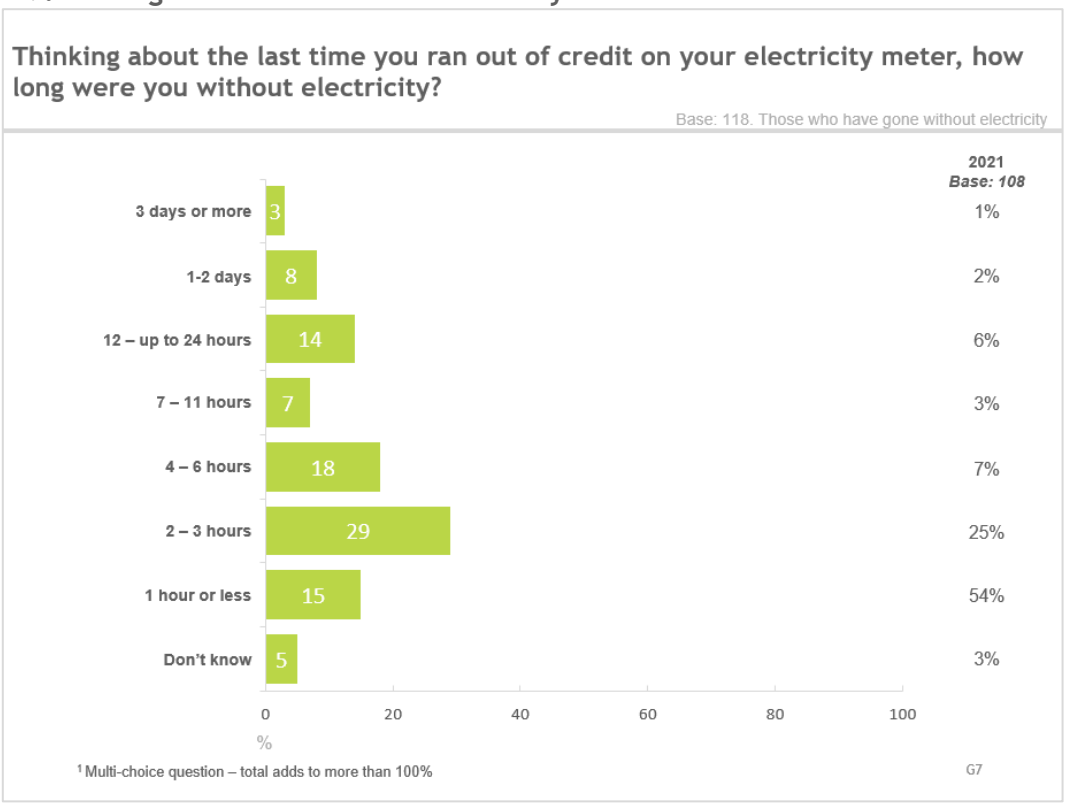
Length of time without energy

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

Electricity

Four in five (83%) respondents who ran out of credit on their electricity prepayment meter reported that their supply was restored on the same day, including 15% who were without their electricity for up to one hour. However, 11% stated that they were without electricity for longer than a day.

Figure 9.11 Length of time without electricity



Methods to reduce spend on energy

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

Electricity

Over four in five (85%) reported that they had reduced the amount of electricity they were using in the previous year, while 6% 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. 12% of respondents with an electricity prepayment meter stated that they had reduced the amount they usually put on their meter.

Figure 9.12 Incidence of and methods used to reduce spend on electricity bill

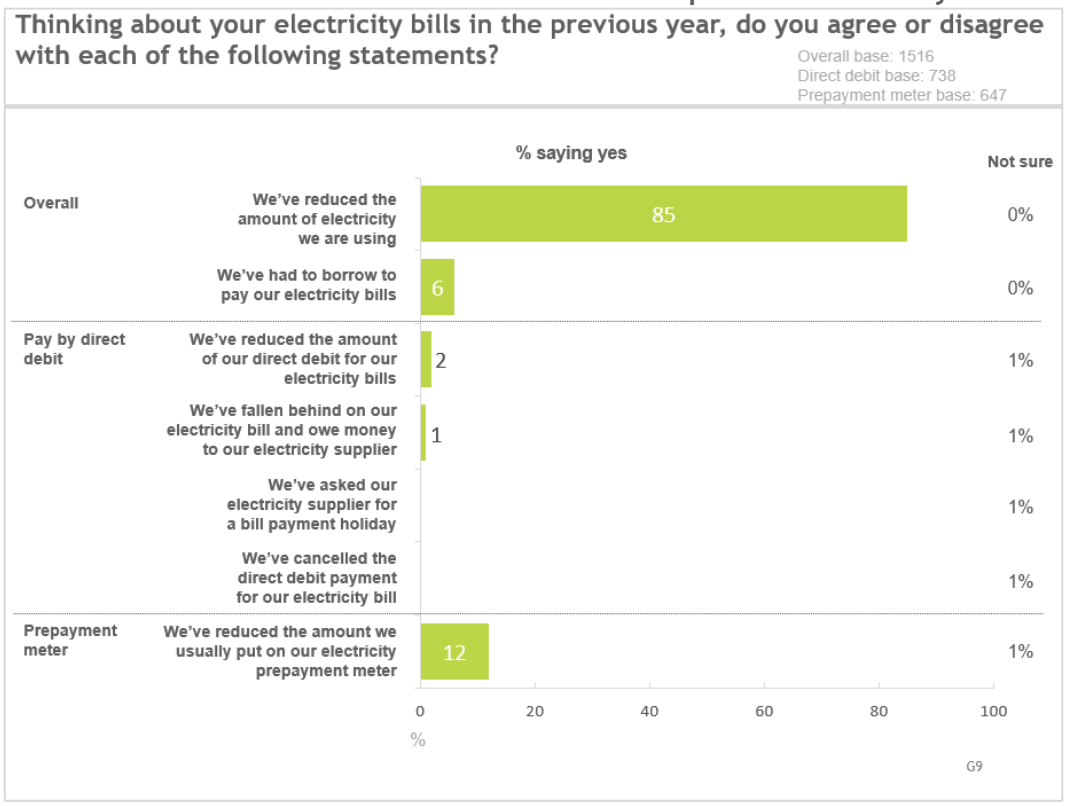


Table 9.4 Incidence of and methods used to reduce spend on electricity bill (2022 vs 2021)

G9 Thinking about your electricity bills in the previous year, do you agree or disagree with each of the following statements?	Overall		Direct debit		Prepayment meter	
	2022 *Base: 1516*	2021 *Base:1514*	2022 *Base: 738*	2021 *Base: 775*	2022 *Base: 647*	2021 *Base: 589*
We've reduced the amount of electricity we are using	85%	34%				
We've had to borrow to pay our electricity bills	6%	2%				
We've reduced the amount of our direct debit for our electricity bills			2%	2%		
We've fallen behind on our electricity bill and owe money to our electricity supplier			1%	1%		
We've asked our electricity supplier for a bill payment holiday			0%	-		
We've cancelled the direct debit payment for our electricity bill			0%	0%		
We've reduced the amount we usually put on our electricity prepayment meter					12%	7%

Several subgroups were significantly more likely to have reduced their electricity usage than others (see Table 9.5):

- Those in the 18 to 34 (87%), 35 to 44 (89%) and 45 to 64 (88%) age groups were more likely to report reducing their electricity usage than those aged 65 and over (78%);
- Non-vulnerable customers (87%) were more likely to report reducing their usage than those in the high or medium vulnerability group (83%); and
- 93% of those who said they had gone without electricity also had to reduce their usage over the last year, compared to 85% of those who did not go without electricity.

Table 9.5 Reducing electricity usage by demographics, vulnerability, and electricity self-disconnection

		Yes	No	Not sure	*Total*
Overall	All *Base: 1516*	85%	14%	0%	*100%*
Age	Under 35 *Base:257*	87%	13%	-	*100%*
	35-44 *Base: 317*	89%	10%	0%	*100%*
	45-64 *Base:548*	88%	12%	-	*100%*
	65 plus *Base: 376*	78%	21%	1%	*100%*
Vulnerability	High/medium vulnerability *Base: 610*	83%	16%	1%	*100%*
	Low vulnerability *Base: 109*	88%	12%	-	*100%*
	Not vulnerable *Base: 797*	87%	13%	0%	*100%*
Electricity self-disconnection	Yes *Base: 138*	93%	7%	-	*100%*
	No *Base: 1372*	85%	15%	0%	*100%*

Similar patterns were observed amongst those who had to borrow money to pay their electricity bills (see Table 9.6):

- Those in the 18 to 34 (11%), 35 to 44 (8%) and 45 to 64 (6%) age groups were more likely to state they have borrowed money than those aged 65 and over (1%);
- 10% of respondents in the C2DE socioeconomic group stated they had to borrow money, in comparison with 2% in the ABC1 group;
- Respondents living in the first quintile of deprivation (11%) were more likely to report having borrowed in comparison with those living in the fifth quintile (4%).
- 7% of those considered to be in the high or medium vulnerability group and 12% in the low vulnerability group said they had borrowed money, compared to 4% who were not considered to be vulnerable;
- 39% of respondents who had gone without electricity said they had to borrow to pay their bills, compared to 2% who had not experienced this;
- Respondents with a prepayment meter for electricity (11%) were more likely to report having borrowed money than those with a credit meter (2%);
- 10% of those who had switched their supplier in the last three years said they had to borrow money, compared to 4% of non-switchers.

Table 9.6 Borrowing money to pay electricity bills by demographics, deprivation, vulnerability, electricity self-disconnection, electricity payment and electricity switching

		Yes	No	Not sure	*Total*
Overall	All *Base: 1516*	6%	94%	0%	*100%*
Age	Under 35 *Base:257*	11%	88%	1%	*100%*
	35-44 *Base: 317*	8%	92%	1%	*100%*
	45-64 *Base:548*	6%	94%	0%	*100%*
	65 plus *Base: 376*	1%	99%	0%	*100%*
SEG	ABC1 *Base:743*	2%	98%	0%	*100%*
	C2DE *Base:747*	10%	90%	0%	*100%*
MDM quintile	1 – Most deprived *Base:287*	11%	89%	0%	*100%*
	2 *Base:297*	6%	93%	1%	*100%*
	3 *Base: 310*	4%	95%	0%	*100%*
	4 *Base: 315*	4%	95%	0%	*100%*
	5 – Least deprived *Base: 307*	4%	96%	0%	*100%*
Vulnerability	High/medium vulnerability *Base: 610*	7%	93%	0%	*100%*
	Low vulnerability *Base: 109*	12%	87%	1%	*100%*
	Not vulnerable *Base: 797*	4%	95%	1%	*100%*
Electricity self-disconnection	Yes *Base: 138*	39%	60%	1%	*100%*
	No *Base: 1372*	2%	97%	0%	*100%*
Electricity payment method	Prepayment meter *Base: 647*	11%	88%	0%	*100%*
	Credit meter *Base: 869*	2%	98%	0%	*100%*
Electricity switching	Switchers *Base: 478*	10%	90%	0%	*100%*
	Non-switchers *Base: 1038*	4%	95%	0%	*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 9.13).

87% of gas customers stated that they had reduced the amount of gas they were using last year, while 8% reported that they had to borrow to cover their gas bills. 2% 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. 1% have asked their supplier for a bill payment holiday, with 2% saying that they cancelled the direct debit payment for their

gas bill. 12% of those with a gas prepayment meter revealed that they have reduced the amount they usually put on their meter.

Figure 9.13 Methods to reduce spend on gas bill

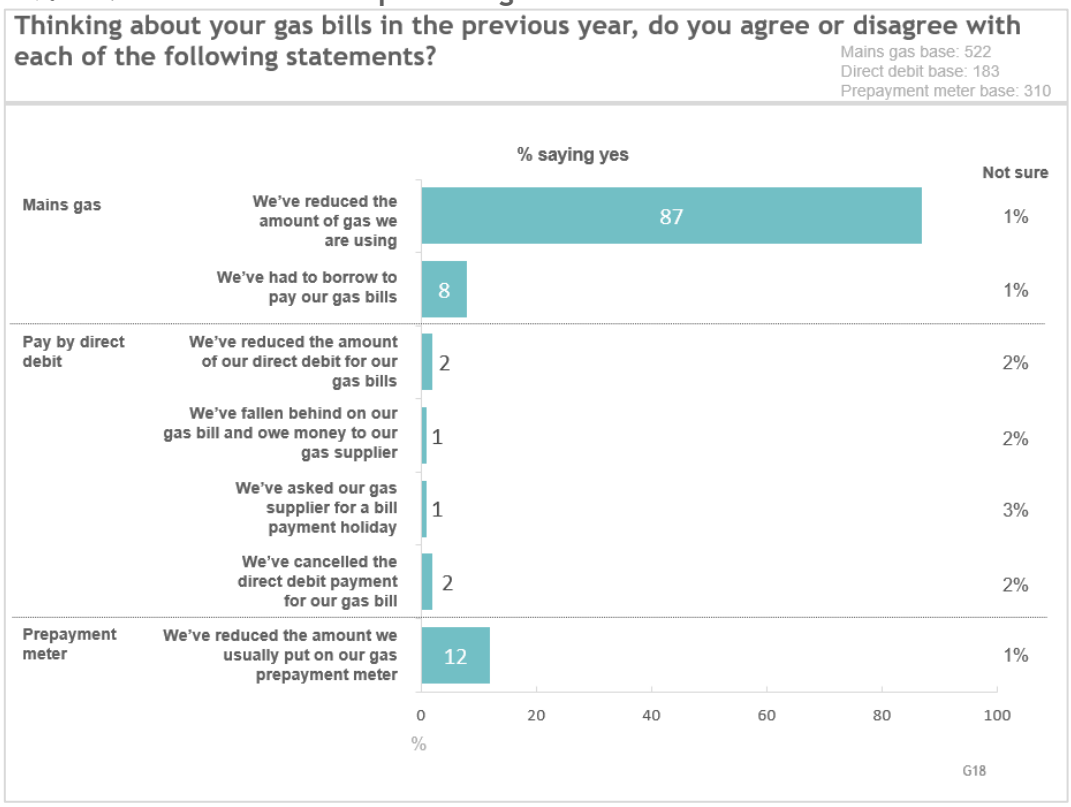


Table 9.7 Incidence of and methods used to reduce spend on gas bill (2022 vs 2021)

G18 Thinking about your gas bills in the previous year, do you agree or disagree with each of the following statements?	Overall		Direct debit		Prepayment meter	
	2022 *Base: 522*	2021 *Base:493*	2022 *Base: 183*	2021 *Base: 184*	2022 *Base: 310*	2021 *Base: 279*
We've reduced the amount of gas we are using	87%	28%				
We've had to borrow to pay our gas bills	8%	3%				
We've reduced the amount of our direct debit for our gas bills			2%	1%		
We've fallen behind on our gas bill and owe money to our gas supplier			1%	1%		
We've asked our gas supplier for a bill payment holiday			1%	-		
We've cancelled the direct debit payment for our gas bill			2%	-		
We've reduced the amount we usually put on our gas prepayment meter					12%	10%

While no significant differences were observed regarding those who had to reduce their gas usage, subgroup analysis revealed the following differences between those who had to borrow money to pay for their gas bills (see Table 9.8):

- 14% of those aged 18 to 34 said they had to borrow money, compared to 3% aged 65 and over;
- Those in the C2DE socioeconomic group (12%) were more likely to say they have borrowed money than those in the ABC1 group (3%);
- Respondents who live in social housing (27%) were more likely to say they have borrowed money to pay for their gas bills when compared with those who privately rent (9%) and who own their home (3%);
- 12% of respondents living in the first quintile of deprivation reported borrowing money, compared to 2% living in the fifth quintile; and
- Those who have a prepayment meter for gas (12%) were more likely to report having borrowed money to pay their gas bills, with only 2% who have a credit meter reporting doing this.

Table 9.8 Borrowing money to pay gas bills by demographics, deprivation, vulnerability and gas payment

		Yes	No	Not sure	*Total*
Overall	All *Base: 522*	8%	92%	1%	*100%*
Age	Under 35 *Base: 112*	14%	86%	-	*100%*
	35-44 *Base: 140*	6%	93%	1%	*100%*
	45-64 *Base: 171*	8%	92%	1%	*100%*
	65 plus *Base: 92*	3%	96%	1%	*100%*
SEG	ABC1 *Base:245*	3%	97%	0%	*100%*
	C2DE *Base:266*	12%	88%	-	*100%*
MDM quintile	1 – Most deprived *Base: 145*	12%	88%	-	*100%*
	2 *Base: 81*	10%	89%	1%	*100%*
	3 *Base: 68*	9%	91%	-	*100%*
	4 *Base: 82*	7%	90%	2%	*100%*
	5 – Least deprived *Base: 146*	2%	98%	-	*100%*
Vulnerability	High/medium vulnerability *Base: 172*	12%	87%	1%	*100%*
	Low vulnerability *Base: 45*	13%	87%	-	*100%*
	Not vulnerable *Base: 305*	5%	95%	1%	*100%*
Gas payment method	Prepayment meter *Base: 310*	12%	88%	0%	*100%*
	Credit meter *Base: 212*	2%	97%	1%	*100%*

The 2022 Domestic Tracker exhibited a large rise in the number of consumers who have had to take measures to reduce spend on their electricity and gas bills. In 2021 one third (34%) of respondents said they had reduced their electricity usage, while 2% mentioned they had to borrow money. In comparison, 85% of respondents in the 2022 Domestic Tracker have reduced their electricity usage, and 6% have borrowed money to pay their bill (see Table 9.4). 28% of gas customers in 2021 said they had reduced their gas bill, compared to 87% in the 2022 Tracker. The amount of gas customers who have had to borrow money to pay their bills has also risen from 3% in 2021 to 8% in 2022.

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

10. Consumer protections

In this section we determine the level of awareness 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.

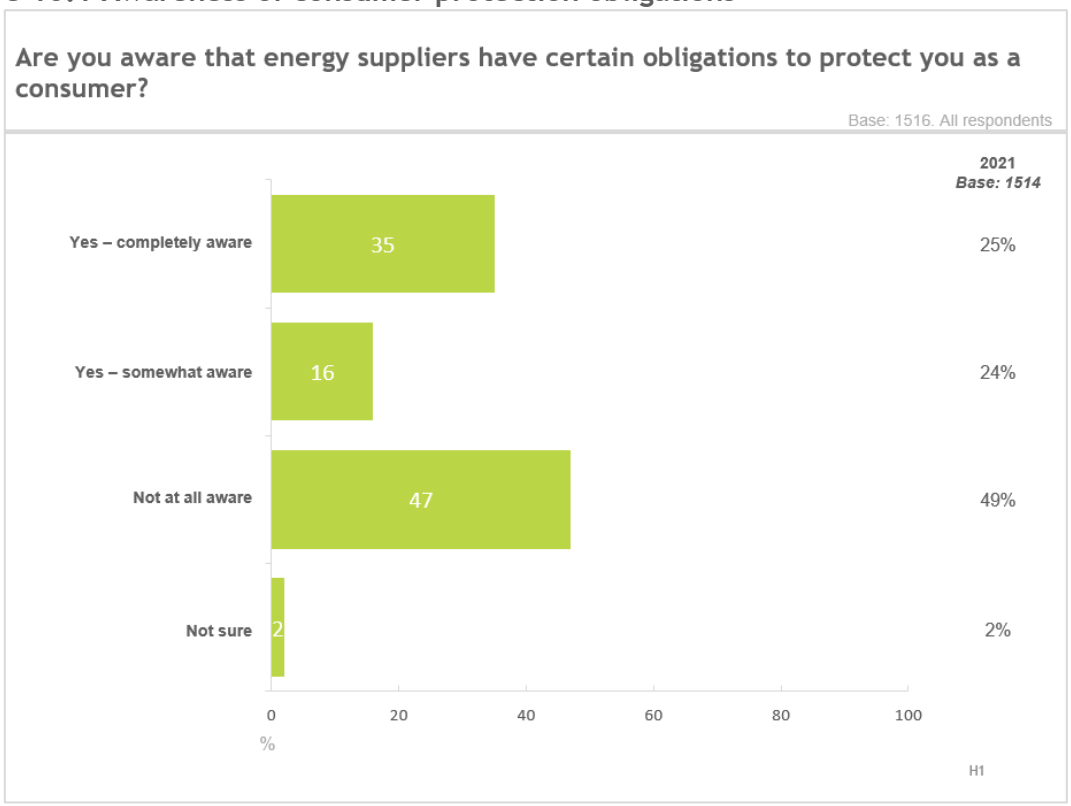
Key findings

- Half (51%) of domestic consumers are aware that energy suppliers have obligations to protect them.
- Two thirds (68%) 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.

Half (51%) of domestic consumers were aware that their energy supplier has an obligation to protect them as a consumer, including one third (35%) who were completely aware of this. However, 47% were not aware of the obligation.

Both electricity (54%) and gas (51%) customers who have a prepayment meter were more likely not to be aware of these obligations than those with a credit meter for electricity (42%) and gas (37%).

Figure 10.1 Awareness of consumer protection obligations



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

- Over half (57%) of those in the ABC1 group were aware of their supplier's obligations to them, compared to 46% of C2DE respondents;
- Domestic consumers living in the most deprived areas (50%) were more likely than those in the least deprived areas (40%) to not be aware of the obligations;
- Those who owned their home (54%) tended to be aware of their supplier's obligations to them compared to those who live in social housing (40%);
- Those with access to the internet (53%) and who were confident internet users (55%) were more likely to be aware than those without access (38%) and who were not confident as internet users (38%); and
- 52% of those who were in the high or medium vulnerability category were not aware of their energy supplier's obligations, compared to 42% who were not vulnerable.

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: 1516*	35%	16%	47%	2%	*100%*
SEG	ABC1 *Base: 743*	39%	18%	42%	1%	*100%*
	C2DE *Base: 747*	32%	14%	52%	2%	*100%*
MDM Quintile	1 – Most deprived *Base: 287*	41%	9%	50%	1%	*100%*
	2 *Base: 297*	34%	15%	47%	4%	*100%*
	3 *Base: 310*	30%	20%	49%	0%	*100%*
	4 *Base: 315*	31%	19%	49%	1%	*100%*
	5 – Least deprived *Base: 307*	42%	16%	40%	2%	*100%*
Tenure	Own home *Base: 1180*	37%	17%	45%	1%	*100%*
	Private renting *Base: 163*	37%	9%	53%	2%	*100%*
	Social housing *Base: 160*	26%	14%	58%	2%	*100%*
Internet access	Yes *Base: 1377*	37%	16%	46%	2%	*100%*
	No *Base: 139*	24%	14%	60%	1%	*100%*
Confidence using internet	Not confident *Base: 272*	25%	13%	61%	1%	*100%*
	Neither *Base: 211*	31%	20%	46%	3%	*100%*
	Confident *Base: 1033*	39%	16%	44%	1%	*100%*
Vulnerability	High/ medium vulnerability *Base: 610*	30%	17%	52%	1%	*100%*
	Low vulnerability *Base: 109*	26%	17%	55%	2%	*100%*
	Not vulnerable *Base: 797*	41%	15%	42%	2%	*100%*
Electricity payment method	Prepayment meter *Base: 647*	32%	11%	54%	3%	*100%*
	Credit meter *Base: 869*	38%	19%	42%	1%	*100%*
Gas payment method	Prepayment meter *Base: 310*	37%	9%	51%	3%	*100%*
	Credit meter *Base: 212*	45%	17%	37%	1%	*100%*

Of those who were aware, two thirds (68%) stated that they would know how to make a complaint if they felt their supplier was not meeting these obligations. Domestic consumers who consider themselves to be confident internet users (71%) were more likely to be aware of how to make a complaint than those who are not confident users (56%).

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

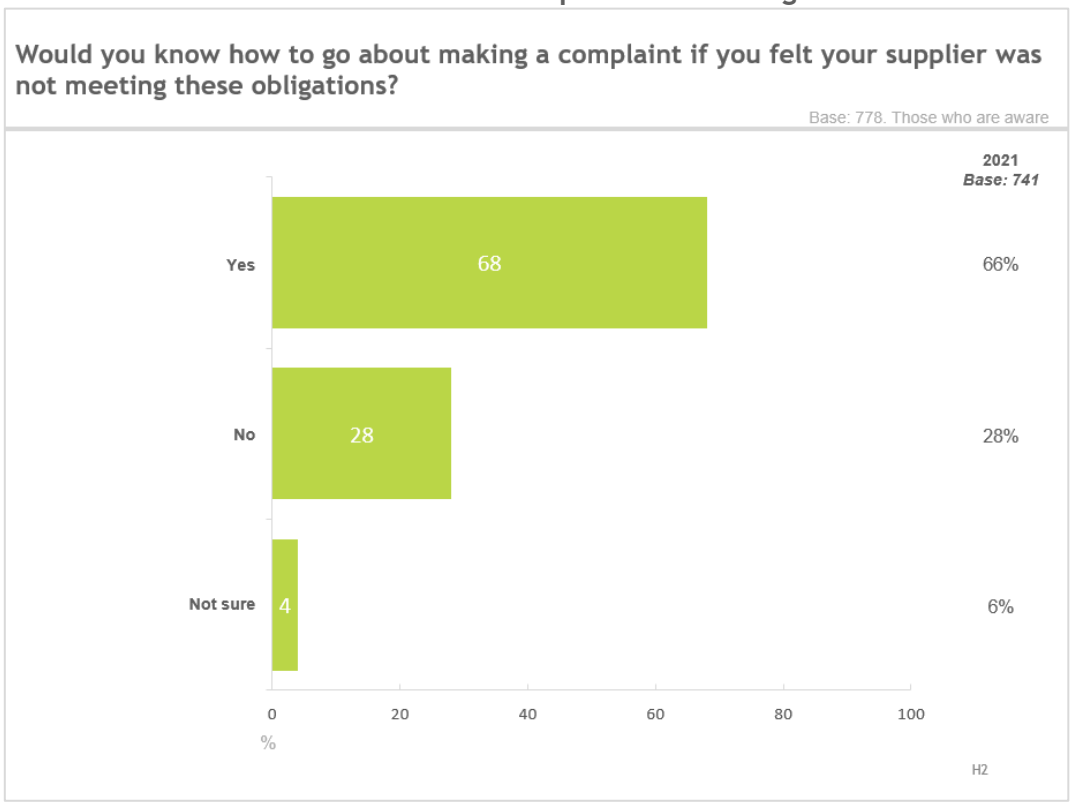


Table 10.2 Awareness of how to make a complaint when obligations are not met by internet use

		Yes	No	Not sure	*Total*
Overall	All *Base: 778*	68%	28%	4%	*100%*
Internet confidence	Not confident *Base: 103*	56%	34%	10%	*100%*
	Neither *Base: 108*	67%	31%	3%	*100%*
	Confident *Base: 567*	71%	26%	4%	*100%*

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

11. Support services

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

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

Key findings

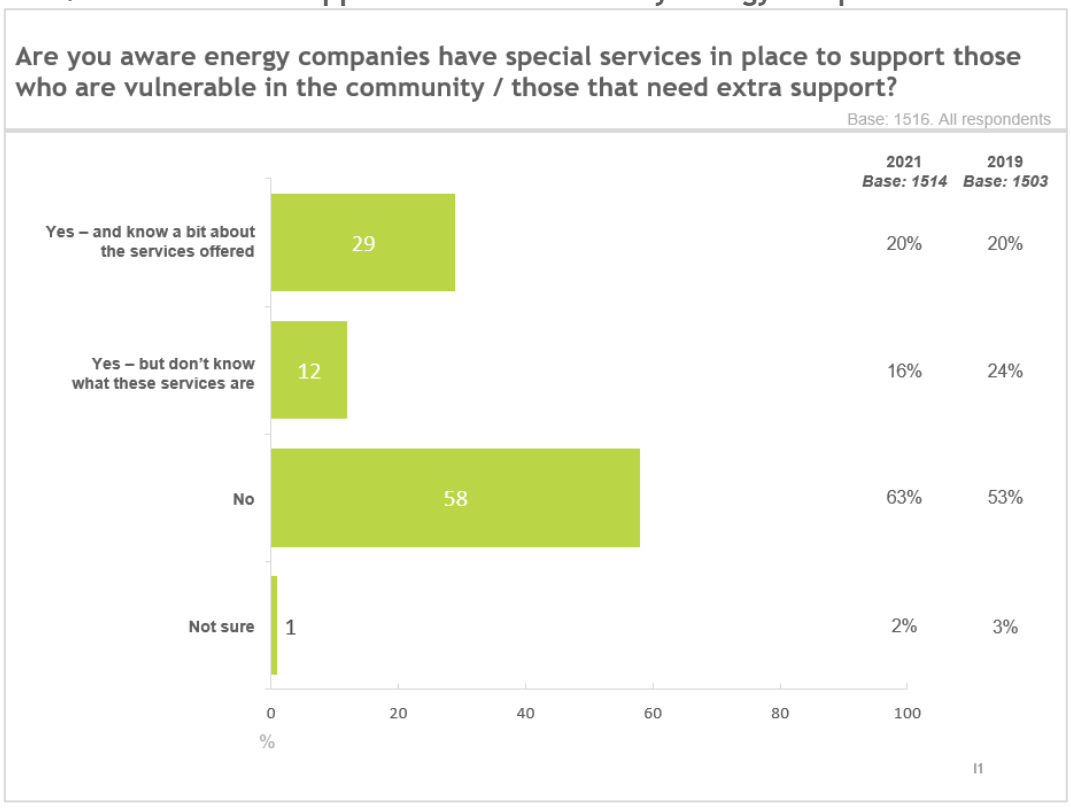
- Three in five (58%) domestic consumers were not aware of the special services offered by energy companies to consumers who are vulnerable or who require extra support.
- 2% were signed up to or had utilised some of the support service offered by energy companies.
- The majority (95%) of those in the high or medium vulnerability group had not signed up to utilise any of the support services offered by energy companies.
- One fifth (18%) were aware of the services for vulnerable consumers that NI Water provides.

Energy companies

Awareness of support offered by energy companies

Four in five (41%) respondents indicated that they were aware that energy companies have support services for vulnerable customers, with 29% knowing something about what type of services are offered. However, 58% were not aware that support is available.

Figure 11.1 Awareness of support services offered by energy companies



Domestic consumers who had an electricity prepayment meter (62%) were more likely not to be aware of the services compared to those using a credit meter (55%). This was also true for gas customers, with 59% on a prepayment meter reporting that they were unaware compared to 49% using a credit meter, while respondents who had not switched their electricity or gas supplier (60%) were more likely to not be aware compared to those who had switched (53%).

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

- 68% of those aged 18 to 34, compared to 57% aged 65 and over
- 61% of C2DE respondents, compared to 55% of those in the ABC1 group;
- Three in five (61%) of those living in the most deprived areas, compared to 50% in the least deprived areas;
- Almost three quarters (72%) of those who do not have access to the internet and two thirds (67%) of those who are not confident internet users, compared to 56% who have access and 55% who are confident users of the internet; and
- 70% of those who have gone without either electricity or gas, compared to 57% who have not done so.

Table 11.1 Awareness of support services offered by energy companies by demographics, deprivation, internet access, energy self-disconnection and payment method

		Yes – know a bit about services	Yes – but don't know what services are	No	Not sure	*Total*
Overall	All *Base: 1516*	29%	12%	58%	1%	*100%*
Age	Under 35 *Base:257*	20%	11%	68%	1%	*100%*
	35-44 *Base: 317*	30%	14%	55%	2%	*100%*
	45-64 *Base:548*	34%	11%	55%	1%	*100%*
	65 plus *Base: 376*	29%	12%	57%	2%	*100%*
SEG	ABC1 *Base: 743*	31%	13%	55%	1%	*100%*
	C2DE *Base: 747*	28%	10%	61%	1%	*100%*
MDM Quintile	1 – Most deprived *Base: 287*	31%	7%	61%	-	*100%*
	2 *Base: 297*	25%	9%	64%	2%	*100%*
	3 *Base: 310*	28%	13%	58%	1%	*100%*
	4 *Base: 315*	25%	17%	57%	2%	*100%*
	5 – Least deprived *Base: 307*	37%	12%	50%	2%	*100%*
Internet access	Yes *Base: 1377*	30%	12%	56%	1%	*100%*
	No *Base: 139*	18%	9%	72%	1%	*100%*
Internet confidence	Not confident *Base: 272*	22%	9%	67%	2%	*100%*
	Neither *Base: 211*	24%	15%	59%	2%	*100%*
	Confident *Base: 1033*	32%	12%	55%	1%	*100%*
Energy self-disconnection	Yes *Base: 156*	14%	14%	70%	2%	*100%*
	No *Base: 1354*	31%	11%	57%	1%	*100%*
Electricity payment method	Prepayment meter *Base: 647*	27%	10%	62%	1%	*100%*
	Credit meter *Base: 869*	31%	13%	55%	2%	*100%*
Gas payment method	Prepayment meter *Base: 310*	31%	9%	59%	1%	*100%*
	Credit meter *Base: 212*	34%	15%	49%	2%	*100%*
Switching	Switchers *Base: 488*	33%	14%	53%	1%	*100%*
	Non-switchers *Base: 1028*	28%	11%	60%	2%	*100%*

Knowledge of the support services offered by suppliers has increased from 2021. 41% of respondents reported that they were aware of support services compared to 36% in the 2021 Tracker (see Figure 11.1).

Use of support offered by energy companies

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

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

The vast majority (98%) of domestic consumers had not used any of the support services. 1% were signed up to NIE Networks' Critical Care Register, and 1% were signed up to their supplier's Customer Care Register. No respondents had requested a large print bill or had been 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.

29 of the 38 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 (98%) of those in high or medium vulnerability groups had not signed up for their supplier's Customer Care Register.

Figure 11.2 Use of support services offered by energy companies

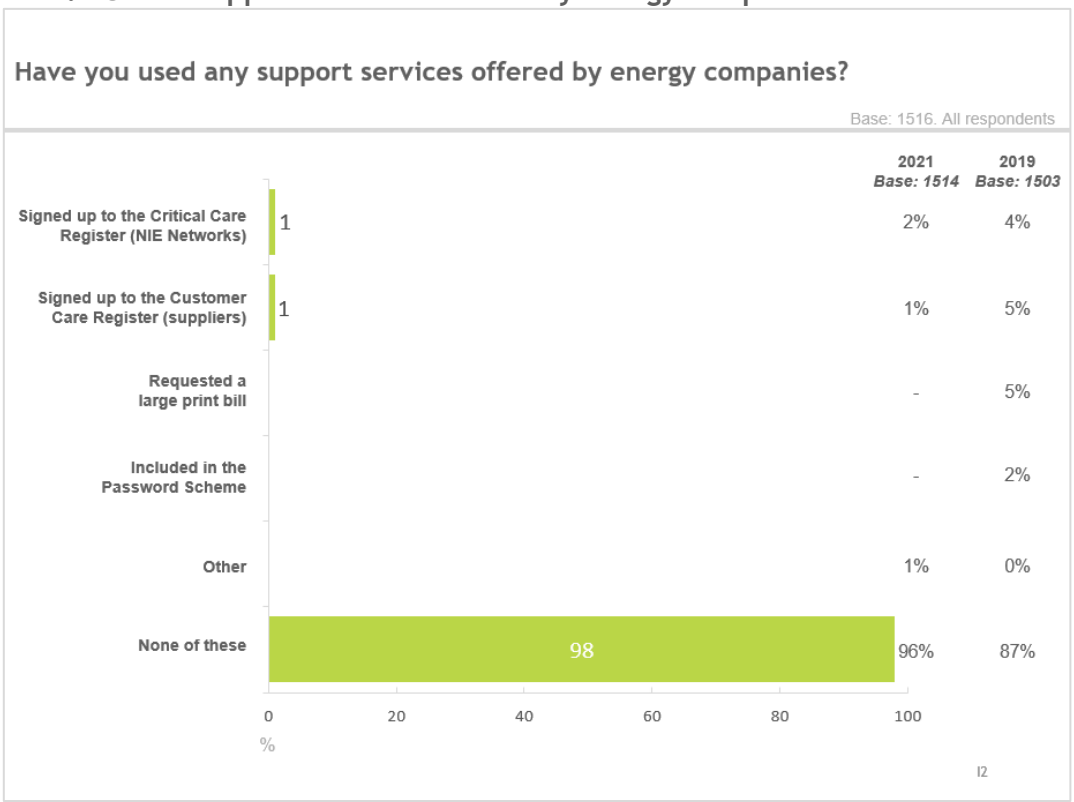


Table 11.2 Use of support services offered by energy companies by vulnerability

	Overall *Base: 1516*	High/medium vulnerability *Base 597*	Low vulnerability *Base: 133*	Not vulnerable *Base: 784*
Signed up to the Critical Care Register	1%	3%	-	0%
Signed up to the customer care register	1%	2%	-	0%
Requested a large print bill	-	-	-	-
Included in the Password Scheme	-	-	-	-
Other	0%	0%	-	0%
None of these	98%	95%	100%	99%

As demonstrated in the 2021 Domestic Tracker, the low awareness and take-up of these support services amongst vulnerable consumers may be due to their access to and confidence in using the internet (see Table 11.3). One in five (19%) 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 (97%) said they have access. Similarly, over one third (36%) high or medium vulnerable consumers stated they were not confident internet users, compared to 2% and 7% of low vulnerable and non-vulnerable respondents respectively.

Age and deprivation were also indicators of internet access and use. Almost all (98%) of those aged 18 to 34 years old have internet access, compared to under three quarters (73%) of those aged 65 and over. 46% aged over 65 rated themselves as not confident internet users, compared to 3% aged 18 to 34. Of those living in the most deprived areas, 89% had access to the internet and 68% were confident internet users, compared to 95% and 78% of those in the least deprived areas respectively.

Table 11.3 Internet access and confidence using the internet by age, deprivation and vulnerability

		Internet access		Confidence using internet		
		Yes	No	Not confident	Neither	Confident
Overall	All *Base: 1516*	91%	9%	18%	14%	68%
Age	Under 35 *Base:257*	98%	2%	3%	7%	89%
	35-44 *Base: 317*	97%	3%	4%	8%	88%
	45-64 *Base:548*	96%	4%	14%	18%	69%
	65 plus *Base: 376*	73%	27%	46%	18%	36%
MDM Quintile	1 – Most deprived *Base: 287*	89%	11%	19%	14%	68%
	2 *Base: 297*	88%	12%	21%	16%	63%
	3 *Base: 310*	89%	11%	20%	16%	63%
	4 *Base: 315*	93%	7%	20%	11%	69%
	5 – Least deprived *Base: 307*	95%	5%	10%	12%	78%
Vulnerability	High/ medium vulnerability *Base: 610*	81%	19%	35%	19%	46%
	Low vulnerability *Base: 109*	97%	3%	2%	8%	90%
	Not vulnerable *Base: 797*	97%	3%	7%	11%	82%

Satisfaction with support offered by energy companies

21 of the 32 domestic consumers who had used at least one of the support services said they were 'satisfied' or 'very satisfied' with the service. 11 of the 19 respondents who signed up to NIE Networks' Critical Customer Care Register reported satisfaction with the service, and 10 of the 13 who signed up to their suppliers Customer Care Register reported the same. (see Table 11.4).

Table 11.4 Satisfaction with support services offered by energy companies (2022 vs. 2021 vs. 2019) N.B. Low bases

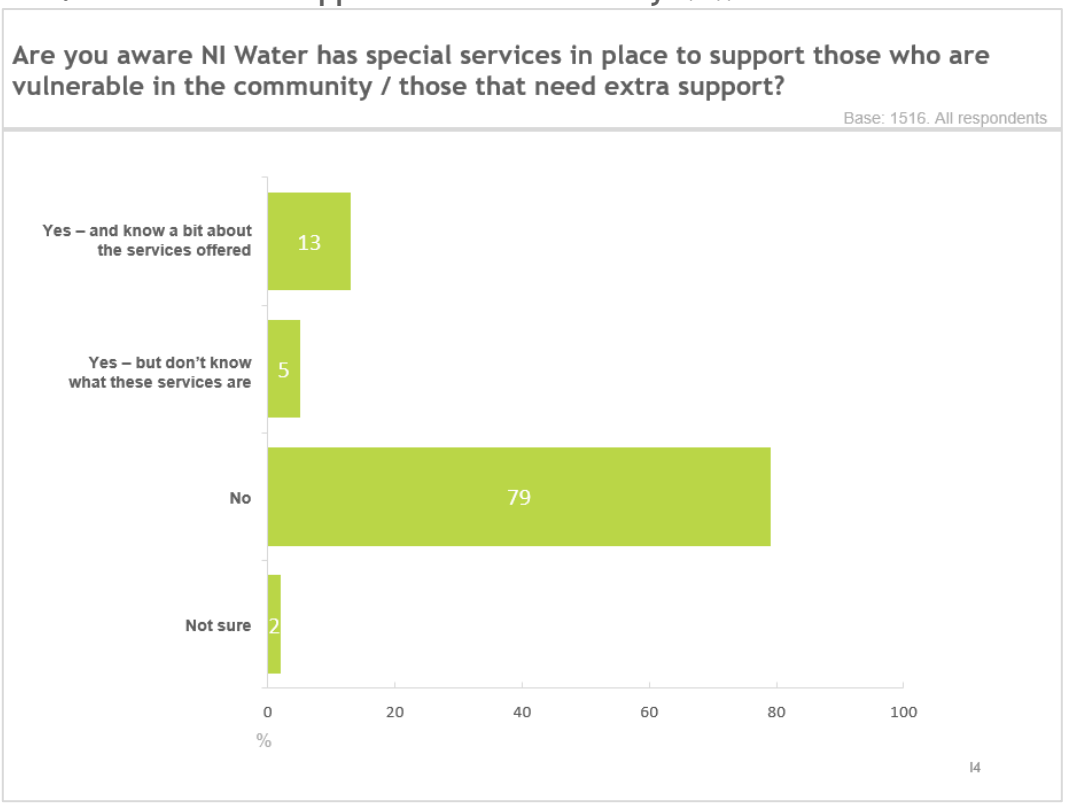
I3 Thinking about the services you used, in general how satisfied were you with this?	Signed up for the Critical Care Register			Signed up to the Customer Care Register			Requested a large print bill			Included in the Password Scheme		
	2022 *Base: 19*	2021 *Base:31*	2019 *Base: 49*	2022 *Base: 13*	2021 *Base: 13*	2019 *Base: 57*	2022 *Base: 0*	2021 *Base: 5*	2019 *Base: 51*	2022 *Base: 0*	2021 *Base: 5*	2019 *Base: 20*
Satisfied	58%	84%	55%	77%	92%	27%	-	80%	31%	-	100%	19%
Dissatisfied	21%	10%	7%	8%	-	21%	-	-	6%	-	-	22%

NI Water

Awareness of support services offered by NI Water

Under one in five (18%) domestic consumers were aware that NI Water offered support services for vulnerable customers, including 13% who knew a bit about the services offered.

Figure 11.3 Awareness of support services offered by NI Water



Although those who are not vulnerable (16%) were more likely to know a bit about these services than those in the high and medium vulnerability group (10%), there were no significant differences observed between those who were not aware. However, subgroup analysis revealed that certain groups were more likely to not be aware of the services offered by NI Water (see Table 11.5):

- 86% of those aged 18 to 34, compared to 80% aged 65 and over;
- 83% of respondents who live in rural areas, compared to 77% in urban areas;
- 83% who live in the most deprived areas, compared to 74% in the least deprived; and
- 86% of those who do not have internet access and 87% who would not consider themselves to be confident internet users, compared to 79% who do have access to the internet and 77% who consider themselves to be confident internet users.

Table 11.5 Awareness of support services offered by NI Water by demographics, location, deprivation, internet access and vulnerability

		Yes – know about services	No – don't know what services are	No	Not sure	*Total*
Overall	All *Base: 1516*	13%	5%	79%	2%	*100%*
Age	Under 35 *Base:257*	8%	5%	86%	0%	*100%*
	35-44 *Base: 317*	16%	5%	77%	2%	*100%*
	45-64 *Base:548*	16%	5%	78%	1%	*100%*
	65 plus *Base: 376*	11%	7%	80%	3%	*100%*
Location	Urban *Base: 966*	15%	5%	77%	2%	*100%*
	Rural *Base: 550*	10%	5%	83%	2%	*100%*
MDM Quintile	1 – Most deprived *Base: 287*	13%	3%	83%	1%	*100%*
	2 *Base: 297*	11%	6%	80%	3%	*100%*
	3 *Base: 310*	14%	6%	80%	0%	*100%*
	4 *Base: 315*	14%	5%	79%	2%	*100%*
	5 – Least deprived *Base: 307*	16%	7%	74%	3%	*100%*
Internet access	Yes *Base: 1377*	14%	5%	79%	2%	*100%*
	No *Base: 139*	5%	6%	86%	3%	*100%*
Internet confidence	Not confident *Base: 272*	6%	4%	87%	3%	*100%*
	Neither *Base: 211*	9%	8%	80%	4%	*100%*
	Confident *Base: 1033*	16%	5%	77%	1%	*100%*
Vulnerability	High/medium vulnerability *Base: 610*	10%	6%	81%	3%	*100%*
	Low vulnerability *Base: 109*	13%	6%	81%	1%	*100%*
	Not vulnerable *Base: 797*	16%	5%	78%	1%	*100%*

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

12. Conclusions and areas for consideration

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

Since the last Domestic Tracker there have been steep increases in the price of energy[11]. The impact of these increases on consumers is shown in this current report. The proportion of respondents spending £100 or more per month on electricity has increased from 13% to 43% between 2021 and 2022, while 44% now spend at least £100 or more per month on their heating bill[12] compared to 12% in 2021.

While the majority of electricity (95%) and gas (92%) customers are able to keep on top of their energy bills, domestic consumers confirmed that they have made changes to their behaviour. 85% have reduced their electricity usage (compared to 34% in 2021) and 87% have reduced the amount of gas they use (compared to 28% in 2021). It should also be noted that a greater percentage indicated they sometimes struggle with their bill compared to the 2021 Tracker study; 39% said this in relation to their electricity bill compared to 13% in 2021, and 33% in relation to their gas bill compared to 15% in 2021.

The incidence of borrowing money to pay energy bills has also increased since 2021, while a greater percentage of consumers are now having to resort to going without or delaying buying essentials in order to pay for their energy. Since the previous Tracker, there has also been a further reduction in support amongst domestic consumers to pay extra on their bill for projects to protect the environment, for providing extra help for vulnerable consumers, and for improving the reliability of the network.

It may be the case that domestic consumers are not aware of any support services offered by their energy suppliers or other agencies that can help them cope with rising bills. Only 11% had contacted their electricity supplier in the last year, with the most common reasons for contact being related to their bill or contract. The Utility Regulator may therefore wish to examine how much support energy suppliers provide to their customers, and whether there

[11] https://www.bbc.co.uk/news/uk-northern-ireland-58558645
[12] This includes all heating sources.

are ways to increase awareness of the services available to customers who may be struggling with their energy bill.

Increased engagement but inertia with switching energy supplier

One potential impact of rising energy costs is that domestic customers are now more likely to engage with correspondence from their energy supplier. 56% and 54% had read the last written correspondence they received from their electricity and gas supplier respectively, compared to 41% and 40% in the 2021 Domestic Tracker. With regards to their energy contract and choice of suppliers, 83% of domestic consumers are now completely aware that they have a choice between electricity suppliers, compared to 72% in 2021. Over half (54%) of domestic consumers have also compared their electricity deal, an increase of 14 percentage points from 2021.

Despite this increased engagement there is still an inertia amongst domestic consumers to switch their electricity supplier, with the proportion of respondents who reported never switching their electricity supplier increasing slightly from 52% to 55%. Although contentment with their current service is the main driver for remaining with their supplier, there has been an increase in the percentage of respondents who are worried about the hassle of switching supplier. It may therefore be useful to provide domestic consumers with information on what the switching process entails and what sort of disruption, if any, they can expect.

Prevalence of doorstep sellers

While being approached by a doorstep seller has become less of a driver to switch energy supplier since the 2021 Tracker, the proportion of respondents who have switched via a doorstep seller has remained consistent, with almost half (48%, compared to 49% in 2021) using a doorstep seller to switch their electricity supplier.

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, with just under half (47%) being unaware of the obligations their suppliers have to protect consumers. 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

There has been an increase in the proportion of respondents who indicated they are completely aware of the obligations that energy companies have to protect their customers, with 35% reporting this compared to 25% in 2021. However, domestic consumers are still largely unaware of the obligations that energy suppliers have to protect their customers, with 47% not at all aware of these (49% in 2021). One quarter (28%) are also unaware of how to make a complaint when these obligations have not been met – the same result as observed in 2021. 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.

Younger customers struggling more with rising costs

Findings from the survey suggest that younger respondents were more likely to spend more on their electricity and gas bills than their older counterparts. 40% of consumers aged 18 to 34 spend more than £100 per month on their electricity bill, compared to 30% of those aged 65 and over. These increased costs have had several impacts on younger consumers as demonstrated throughout this report. Compared to domestic consumers aged 65 and over, those aged 18 to 34 were more likely: to distrust their supplier to treat them fairly and provide a fair price; to say they struggle to pay their electricity bill; to have delayed or put off getting essentials to afford their electricity; to have reduced their electricity and gas usage; and to have borrowed money to pay their electricity bill.

With younger consumers appearing to struggle more, there is evidence to suggest they take a more proactive approach to ensuring they are on the best deal for them. Those aged 18 to 34 were also more likely: to be aware they can compare electricity deals and agree that doing so gives access to better deals; to have compared their electricity deal and found this easy to do so; and to have switched their electricity supplier within the last three years. However, it is still important for energy suppliers to ensure their younger customers are fully aware of their current deal, with those aged 18 to 34 more likely to report never receiving any correspondence from their electricity or gas supplier.

Older consumers not as affected by rising costs

As found in the 2021 Tracker, older domestic consumers showed less engagement with their energy supplier and deal. While they were more likely to know in which form they receive correspondence from their energy supplier, they were less likely to agree that they understood the information in the correspondence. They were also less likely to report having compared their energy deal and subsequently switching energy supplier, and were less likely to be aware of how electricity and gas prices in NI compare to other regions.

One possible explanation for this low engagement is that domestic consumers aged 65 and over have not struggled as much with rising costs. Indeed, only 30% of older consumers reported spending at least £100 per month on their electricity bill, and were not as likely to struggle to pay their electricity bills or take measures to reduce their energy costs (although over three quarters have had to reduce their electricity usage). Incidence of making complaints to their energy supplier were also lowest amongst this age group. With older domestic consumers more likely to be happy with their current service, their inertia is not surprising, but it is still an area that needs to be looked at closely.

Passiveness in rural areas

Rural domestic consumers have continued to have a more static approach to their energy contract, with 30% reporting that they had switched their electricity supplier and 20% of those who had switched doing so within the past year. This compares to 52% of urban customers who have switched and 31% that have done so in the past year. This could be explained by rural customers showing less interest in comparing electricity deals, or by them being less aware that they have a choice of suppliers. However, an alternative explanation could be found when looking at the ways in which domestic consumers switch their supplier. Half (51%) of

urban respondents who had switched had done so through a doorstep seller, compared to 37% of rural respondents. Rural consumers could therefore be less aware of their options as they do not receive as many (or any) direct approaches to switch their supplier.

Most deprived areas have trust in their suppliers, but are more likely to show signs of struggling

Although there is little difference in the amount spent on electricity and heating between those living in the first (most deprived) and fifth (least deprived) quintiles of deprivation, there is evidence to suggest that those living in deprived areas are struggling more. While respondents living in the first quintile were more likely to trust their electricity supplier to provide a fair price, they were also more likely to indicate that they sometimes struggle to pay their bills. These consumers are also more likely to have borrowed money to pay for their electricity and gas bills. It is therefore important that these customers are fully aware of their supplier's obligations towards them, and so the Utility Regulator and energy suppliers may wish to explore ways in which they can improve knowledge of these obligations amongst consumers living in the most deprived areas.

Low awareness and usage of support services aimed at vulnerable consumers

While the 2022 Tracker exhibited increased awareness of support services for vulnerable customers, uptake of these services remains low amongst those who could potentially avail of them, despite there being no evidence that vulnerable customers are less likely to be aware of the services. Only 9 of the 38 respondents, who are dependent or live with someone who is medically dependent on electricity, had signed up for NIE Networks' Critical Care Register (inferences should not be drawn from this finding alone due to the low base), while 98% of those in the high and medium vulnerability group were not signed up to their supplier's Customer Care Register.

The 2022 Tracker also examined awareness and uptake of NI Water's support services, but awareness of this was again low, with 81% of those identified as having some level of vulnerability reporting they were unaware.

As vulnerable domestic consumers were amongst the most likely respondents to report going without or delaying the purchase of essentials, it is important that they are fully aware of any support services that are available to them to help alleviate any energy pressures they face. Vulnerable customers remain less likely to be internet users or to be confident internet users, and so the Utility Regulator should consider alternative methods of increasing awareness. With regards to any future Tracker surveys, it may be useful to signpost respondents to relevant organisations that can help them with accessing support services, such as by providing telephone contact numbers.

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

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

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

Impact of self-disconnection[13] on trust and overall satisfaction with energy supplier

18% of domestic customers with a prepayment meter and 2% with a credit meter had gone without electricity at least once over the past year. This appears to have impacted the trust these customers place in their energy supplier. One third (32%) of those who had gone without electricity did not trust their supplier to treat them fairly, while 39% did not trust them to provide a fair price. This has also impacted on overall satisfaction, with one fifth (20%) of those who had been self-disconnected from their supply reporting dissatisfaction with their energy supplier.

In addition to this, 31% of domestic consumers who had experienced self-disconnection were not confident they were on the best electricity deal. These negative perceptions may therefore explain why such respondents were more likely to have switched their electricity supplier. Two thirds (66%) of those who had experienced self-disconnection had switched their supplier at least once, compared to 42% who had not experienced self-disconnection from their electricity supply. This further emphasises the need for domestic consumers to be aware of how to compare energy deals and determine which deal works best for their current circumstances.

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

Engagement with customers on a prepayment meter

The prevalence of prepayment meters in domestic consumers homes has continued to increase from the previous tracker. 43% now have a prepayment meter for electricity compared to 39% in 2021, while three in five (59%) have a gas prepayment meter, compared to 57% in 2021. The results from the 2022 Domestic Tracker exhibit similar trends between those with a prepayment meter and those with a credit meter with regards to their respective engagement with their energy contracts. Those who have a prepayment meter for electricity or gas were more likely to be unaware of what form they receive their correspondence in and more likely to say they have not received any correspondence. This is to be expected since consumers with a prepayment meter are likely only to receive an annual statement or notices around tariff increases rather than regular correspondence from their supplier. In contrast, respondents with a prepayment meter were more likely than those who have a credit meter to have compared their deals and to have then switched their electricity or gas suppliers.

Domestic consumers with a prepayment meter for gas also now appear to be more affected by rising costs. Over one third (35%) of customers with a prepayment meter for gas spend in excess of £100 on their heating bill per month, compared to 7%[14] from the 2021 Tracker. Those who have a prepayment meter were also more likely to suggest that they struggle to pay their electricity or gas bill, and were more likely than those with a credit meter to have borrowed money to pay their bills. These difficulties may explain why customers on a prepayment meter are more likely to be 'switchers' as they are more encouraged to find the best deal. Nevertheless, with prepayment customers more likely to be unaware of energy supplier's consumer protection obligations it is important for them to be fully aware of the details of their current contract.

Low uptake of renewable energy sources

The COP27 summit in Egypt took place during the interviewing period, but much of the media coverage leading up to the event was focussed on the rising cost of living across the UK. This type of uncertainty may have resulted in an unwillingness for domestic consumers to switch or consider switching to renewable energy sources. Fewer than 10 respondents currently use renewable energy to heat their home, while 3% of all respondents indicated they would be willing to switch to renewables.

However, the findings suggest customers are willing to incorporate energy efficiency measures into their homes. When considering those respondents who reported they moved into a home with such measures already installed or had installed them more than three years ago, almost four in five (78%) domestic consumers have energy efficiency measures integrated into their home.

As mentioned previously, domestic consumers were concerned about the disruption associated with switching energy supplier which may also be the case when switching energy source. Further research into the specific reasons for consumers unwillingness to switch to renewables may therefore be required in order to devise methods to alleviate concerns.

[14] Table 5.2 of 2021 Domestic Consumer Insight Tracker Report. Report can be accessed at https://www.uregni.gov.uk/files/uregni/documents/2022-03/niaur-domestic-tracker-written-report-28feb22.pdf

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 2022 with each interview taking, on average, 15 to 20 minutes to complete. Interviewing was carried out in compliance with UK GDPR and the Market Research Society Code of Conduct.

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

Questionnaire design

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

Sample design

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

Sampling frame

The sampling frame for this study includes all domestic energy bill payers. Table A1 shows the current structure of domestic energy consumers in Northern Ireland from published government sources[15].

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.

[15] 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, socio-economic group and location.[16]

STRATIFICATION VARIABLE		ACHIEVED NO.	ACHIEVED %
Age (HRP)	18 - 34	257	17%
	35 - 44	317	21%
	45 - 64	548	36%
	65 and over	376	25%
	Prefer not to say	18	1%
Gender	Male	736	49%
	Female	780	51%
SEG[17]	ABC1	743	49%
	C2DE	747	49%
	Prefer not to say	26	2%
Urban/Rural	Urban	966	64%
	Rural/Mixed	550	36%
Council	Antrim and Newtownabbey	137	9%
	Ards and North Down	143	9%
	Armagh City, Banbridge and Craigavon	166	11%
	Belfast	257	17%
	Causeway Coast and Glens	116	8%
	Derry City and Strabane	132	9%
	Fermanagh and Omagh	75	5%
	Lisburn and Castlereagh	123	8%
	Mid and East Antrim	109	7%
	Mid Ulster	132	9%
	Newry, Mourne and Down	126	8%
Multiple Deprivation Measure quintile	1 – Most deprived	287	19%
	2	297	20%
	3	310	20%
	4	315	21%
	5 – Least deprived	307	20%
Total		**1516**	**100%**

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

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

Margin of error

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

Table A3: Margin of error

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

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

Implementation

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

Data cleaning and quality assurance

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

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

Appendix B - Detailed demographics

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

Table B.1: Gender

Gender		
Gender	**Count**	**Percentage**
Male	736	49%
Female	770	51%
Other	-	-
Total	***1516***	***100%***

Table B.2: Age

Age		
Age	**Count**	**Percentage**
18-34	257	17%
35-44	317	21%
45-64	548	36%
65 plus	376	25%
Refused	18	1%
Total	***1516***	***100%***

Table B.3: Tenure

Tenure		
Tenure	**Count**	**Percentage**
Rent from a private landlord	163	11%
Rent from NI Housing Executive	113	7%
Rent from a housing association	47	3%
Own your home or buying through a mortgage	1180	78%
Refused	13	1%
Total	***1516***	***100%***

Table B.4: Employment status

Employment status		
Employment status	**Count**	**Percentage**
Working full time	723	48%
Working part time	140	9%
Unemployed	179	12%
Retired	448	30%
Student	7	0%
Other	-	-
Refused	19	1%
Total	***1516***	***100%***

Table B.5: Means tested benefit

Means tested benefit		
Means tested benefit	**Count**	**Percentage**
Yes	318	21%
No	1172	77%
Don't know	26	2%
Total	***1516***	***100%***

Table B.6: Socioeconomic group

Socioeconomic group		
SEG	**Count**	**Percentage**
AB	285	19%
C1	458	30%
C2	394	26%
DE	353	23%
Refused	26	2%
Total	***1516***	***100%***

Table B.7: Internet access*

Internet access		
Internet access	**Count**	**Percentage**
Access at home	1372	91%
Access outside of home	56	4%
Access using mobile data	88	6%
Do not have access	139	9%

*Multiple choice question

Table B.8: Method of accessing internet*

Method of accessing internet		
Method of accessing internet	**Count**	**Percentage**
Home computer/laptop	753	53%
Tablet/ iPad	565	41%
Public work computer/ laptop	198	14%
Mobile/ smartphone	1007	73%
Home of friends or family	25	2%
Other	22	2%

*Multiple choice question

Table B.9: Confidence using the internet

Confidence using the internet		
Confidence using the internet	**Count**	**Percentage**
1 – Not at all confident	171	11%
2	101	7%
3	211	14%
4	369	24%
5 – Very confident	664	44%
Total	***1516***	***100%***

Table B.10: English as a first language

English as a first language		
English as a first language	**Count**	**Percentage**
Yes, and speak no other languages	1410	93%
Yes, and speak one or more other languages	63	4%
No	14	1%
Refused	29	2%
Total	***1516***	***100%***

Table B.11: Highest level of education achieved

Highest level of education achieved		
Highest level of education achieved	**Count**	**Percentage**
1 - 4 O levels / CSEs / GCSEs (any grades), Entry Level, Foundation Diploma	169	11%
NVQ Level 1, Foundation GNVQ, Basic Skills	11	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	206	14%
NVQ Level 2, Intermediate GNVQ, City and Guilds Craft, BTEC First / General Diploma, RSA Diploma	56	4%
Apprenticeship	36	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	74	5%
Degree (for example BA, BSc), Higher degree (for example MA, PhD, PGCE)	344	23%
NVQ Level 4 - 5, HNC, HND, RSA Higher Diploma, BTEC Higher Level	37	2%
Professional qualifications (for example teaching, nursing, accountancy)	73	5%
Other vocational / work-related qualifications	20	1%
Foreign qualifications	10	1%
None of these	318	21%
Total	***1516***	***100%***

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

Disability, illness and other factors		
Disability, illness and other factors	**Count**	**Percentage**
Chronic/ serious illness	156	10%
Medically Dependent Equipment	38	3%
Oxygen use	19	1%
Physical impairment	74	5%
Unable to answer door	6	0%
Pensionable age	239	16%
Young children aged 5 or under	109	7%
Blind	**	0%
Partially sighted	7	0%
Hearing/ speech difficulties	19	1%
Unable to communicate in English	-	-
Dementia	16	1%
Developmental condition	15	1%
Mental health	54	4%
Temporary life change	10	1%
Caring for another member of family outside household	22	1%
None of the above	854	56%
Prefer not to say	97	6%
Total	***1516***	***100%***

*Multiple choice question

**Suppressed due to small numbers

Table B.13: Number of people in household

Number of people in household		
Number of people in household	**Count**	**Percentage**
Just me	314	21%
2	546	36%
3	252	17%
4	253	17%
5	96	6%
6+	55	4%
Total	***1516***	***100%***

Table B.14: Children under 18 in household

Children under 18 in household		
Children under 18 in household	**Count**	**Percentage**
None	963	64%
1	172	11%
2	240	16%
3	97	6%
4	27	2%
5+	10	1%
Refused	7	0%
Total	***1516***	***100%***

Table B.16: Location

Location		
Location	**Count**	**Percentage**
Urban	966	64%
Rural	550	36%
Total	***1516***	***100%***

Appendix C - Questionnaire

Introduction questions

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

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

ASK ALL
Code one only

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

Yes, happy to take part
No, I do not want to take part

ASK ALL
Code one only

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

Yes – solely responsible
Yes – jointly responsible
No – not responsible CLOSE
Prefer not to say CLOSE

ASK ALL

S3 Please can you tell me your age?

Record exact age ☐

Code to age category

Code one only

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

ASK ALL

Code one only

S4 Please state your gender

Male
Female
Other
Rather not say

Section A: Fuel source

ASK ALL

Code one only

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

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

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

ASK ALL

Code one only

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

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

If YES at A2

Select all that apply

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

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

If DO NOT use mains gas at A1

Select all that apply

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

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

ASK ALL

Code one only

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

For example, cavity wall insulation, loft insulation etc.
Please do not include smaller measures such as energy saving lightbulbs

Yes
No
Not sure

If YES at A5

Select all that apply

A6a What energy efficiency measures have you put in place?

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

If NO at A5

Select all that apply

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

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

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 complaint to your current electricity supplier in the last 12 months?

Yes
No
Not sure

If complained at D1
Code one only
D2 How easy or difficult did you find it to make a complaint?

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

If complained at D1
Code one only
D3 How quickly was your complaint resolved?

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

If complained at D1
Code one only
D4 How satisfied were you with the outcome of your complaint?

Very dissatisfied
Dissatisfied
Neither satisfied or dissatisfied
Satisfied
Very satisfied

Those who did NOT complain at D1
Code one only
D5 Have you ever wanted to complain to your current electricity supplier?

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

Gas

Ask those who use mains gas at A1

Code one only

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

Yes
No
Not sure

If complained at D6

Code one only

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

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

If complained at D6

Code one only

D8 How quickly was your complaint resolved?

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

If complained at D6

Code one only

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

Very dissatisfied
Dissatisfied
Neither satisfied or dissatisfied
Satisfied
Very satisfied

Those who did NOT complain at D6

Code one only

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

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

Section E: General contact with your supplier

Electricity

ASK ALL

Code one only

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

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

If Yes at E1

Code one only

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

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

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

If G8a=2,3,4,5
Write in
G8b What essentials did you have to go without or delay getting so that you were able to pay for your electricity?

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

Code one only for each

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

Strongly agree
Not sure

Electricity PPM customers	
7	We've reduced the amount we usually put on our electricity prepayment meter

Strongly disagree
Disagree
Neither
Agree
Strongly agree
Not sure

Gas

Mains gas at A1

Code one only

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

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

If struggle at G10 (code 3 or 4)

Code one only

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

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

If yes at G11

Code one only

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

Yes
No
Can't remember/ Not sure

Ask all who use mains gas at A1 (except those with gas PPM)
Code one only
G13 Thinking about the past 12 months, have you ever gone without heating that you really needed in your home because the cost was too high?

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

Ask those with a gas PPM
Code one only
G14 In the past 12 months, have you ever run out of credit on your meter and temporarily gone without gas?

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

If yes at G14 (options 2,3,4)
Select all that apply
G15 Why have you gone without gas?

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

If yes at G14 (options 2,3,4)
Code one only
G16 Thinking about the last time you ran out of credit on your gas meter, for how long were you without gas?

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

Ask all who use mains gas at A1
Code one only

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

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

If G17a=2,3,4,5
Write in

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

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

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

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

Section H: Consumer protections

ASK ALL

Code one only

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

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

If Yes at H1

Code one only

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

Yes
No
Not sure

Section I: Support services

ASK ALL

Code one only

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

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

ASK ALL

Select all that apply

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

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

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

If used a service at I2

Code one only

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

Very dissatisfied
Dissatisfied
Neither
Satisfied
Very satisfied
Don't know

ASK ALL

Code one only

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

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

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

ASK ALL

Select all that apply

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

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

If used a service at I5

Code one only

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

Very dissatisfied
Dissatisfied
Neither
Satisfied
Very satisfied
Don't know

Section J: Final Demographics

ASK ALL

Select one only

J1 Do you..?

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

ASK ALL

Select one only

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

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

ASK ALL

Select one only

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

Yes
No
Don't know

ASK ALL

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

Open ended (to code SEG)

ASK ALL

Select all that apply

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

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

If yes at J5

Select all that apply

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

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

ASK ALL

Code one only

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

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

ASK ALL

Code one only

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

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

ASK ALL

Code one only

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

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

ASK ALL

Select all that apply

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

Chronic/serious illness
Medically Dependant Equipment
Oxygen use
Physical Impairment
Unable to answer door
Pensionable Age
Young children aged 5 or under
Blind
Partially sighted
Hearing /speech difficulties (including deaf)
Unable to communicate in English
Dementia
Developmental condition
Mental Health
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

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

Please include yourself in the total

Just me
2
3
4
5
6+

ASK ALL

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

ASK ALL

Code one only

J13 In which type of location do you currently live?

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

[Record postcode] - For deprivation quintile analysis