



DOMESTIC CONSUMER INSIGHT TRACKER SURVEY 2024

Highlight Report

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Utility
Regulator 

INTRODUCTION

The Domestic Consumer Insight Tracker survey provides insight into the engagement, attitudes and experiences of electricity and gas consumers and how these change over time. The tracker has been completed annually since 2019 with domestic electricity and gas consumers in Northern Ireland.

The survey allows us to build an evidence-based understanding of domestic consumers' experiences of the energy market under key themes, such as payment difficulties, switching, support services and engagement with suppliers.

1,502 participants took part in this year's annual survey between October 2024 and January 2025. This paper highlights some of the key findings from the 2024 survey and accompanies the full report prepared for the Utility Regulator by Perceptive Insight.

KEY FINDINGS

Within this report we have highlighted some of the key findings on the themes of engagement, payment difficulties, awareness of protections and supports, and willingness to pay extra on bills. The report also includes a spotlight section on the difference in experiences of electricity and gas consumers by tenure (whether someone lives in social housing, is a private renter or owns their own home).

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01. ENGAGEMENT WITH SUPPLIERS

Survey participants were asked questions covering different areas of engagement with their suppliers. This includes questions on their interactions with suppliers, switching behaviours, trust and satisfaction.

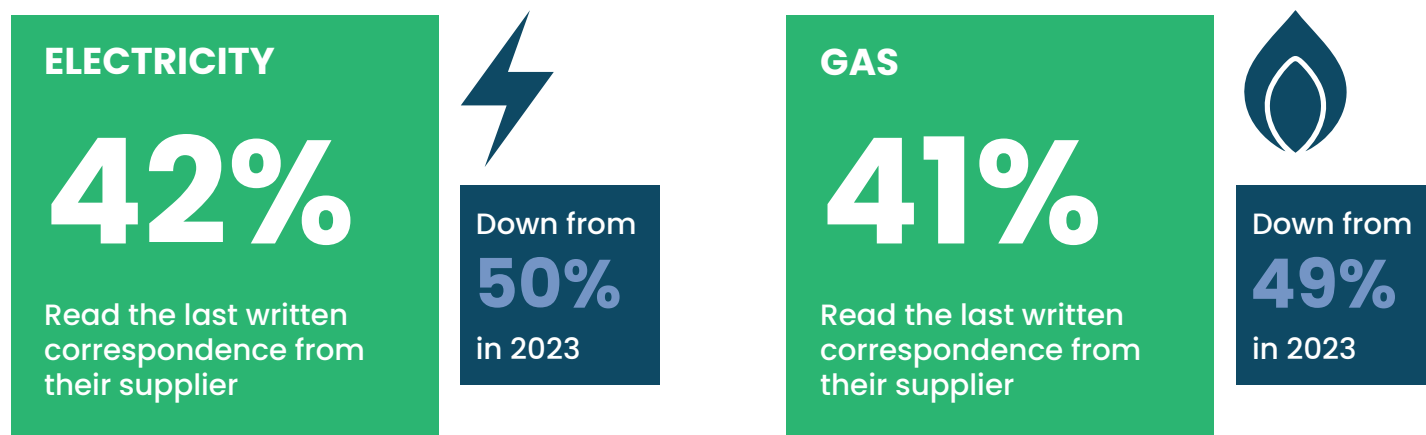
The findings this year suggest that consumers may have become less engaged with their energy contracts. Compared to findings from the previous tracker, respondents were less likely to read correspondence from their supplier, less likely to compare energy deals and less likely to switch.

Overall satisfaction levels with the service from their supplier was high for both gas and electricity. However, a notably larger percentage of respondents reported feeling 'satisfied' than 'very satisfied' for both electricity and gas.

ENGAGEMENT WITH ENERGY CORRESPONDENCE

Compared to findings from the previous tracker, respondents for both electricity and gas were less likely to have read correspondence from their supplier.

- **42%** of electricity consumers read the last written correspondence from their supplier, compared to 50% in 2023. **41%** of gas consumers read the last written correspondence from their supplier, compared to **49%** in 2023.



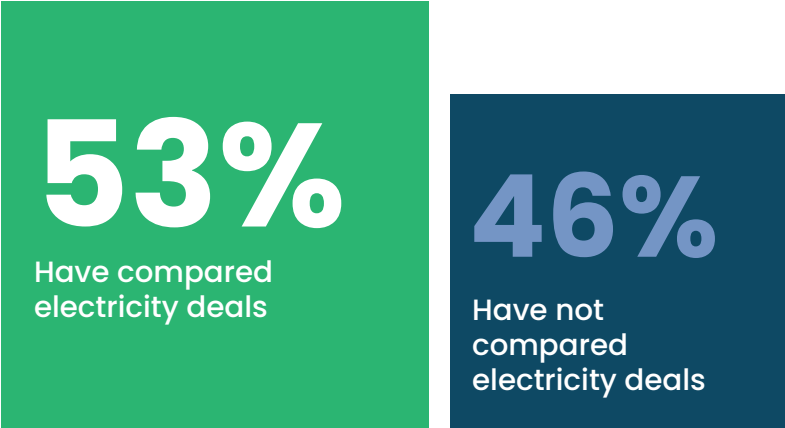
Of those who had read or glanced at their correspondence, there was a decrease in understanding of this correspondence.

- **76%** of electricity consumers agreed or strongly agreed that the information was clear and understandable, compared to **83%** in 2023.
- **73%** of gas consumers agreed or strongly agreed that the information was clear and understandable, compared to **81%** in 2023.

COMPARING ENERGY DEALS AND SWITCHING

Fewer consumers this year reported that they had compared electricity deals at least once at any time to see if they could switch supplier or tariff. **46%** of households had compared electricity deals at some point, down from **53%** in 2023.

PERCENTAGE OF RESPONDENTS WHO HAD EVER COMPARED ELECTRICITY DEALS 2024



47% of electricity respondents reported that they had switched supplier at some point. Of those **47%** who had ever switched, **29%** had done so within the previous year and **75%** had done so within the last three years.

The proportion of respondents who said they would be likely to switch electricity supplier in the next 12 months has decreased from **25%** in 2023 to **16%** in 2024.

PERCENTAGE OF CONSUMERS WHO WOULD BE LIKELY TO SWITCH ELECTRICITY SUPPLIER IN THE NEXT 12 MONTHS



Respondents who had switched supplier in the last three years were more likely to say they would switch again in the next year. They were also more likely to demonstrate engagement in other areas, such as awareness of supplier obligations to their customers.

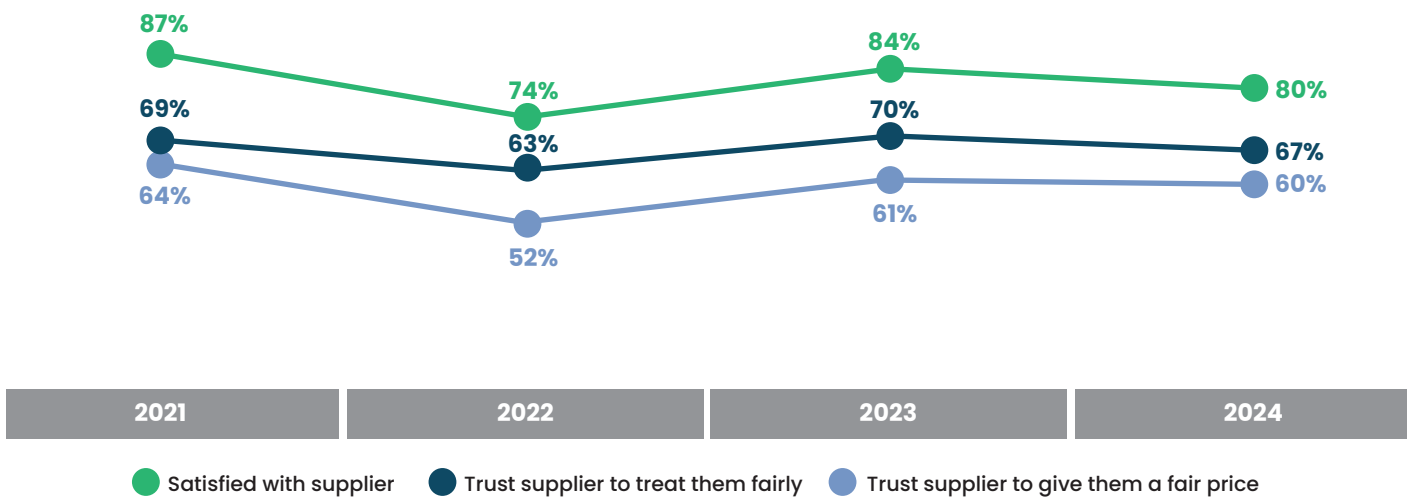
SATISFACTION WITH SERVICE AND TRUST

Overall satisfaction (those who were either satisfied or very satisfied) with service from their supplier was high for both electricity and gas. However, the proportions of respondents who said that they were ‘very satisfied’ with their suppliers were lower in 2024 than in 2023. Overall levels of trust in electricity and gas suppliers were similar to those in 2023.

ELECTRICITY

Overall satisfaction (those who were either satisfied or very satisfied) with service from electricity suppliers remains high (80%). However, a notably larger portion of consumers reported feeling ‘satisfied’ (64%) than ‘very satisfied’ (16%).

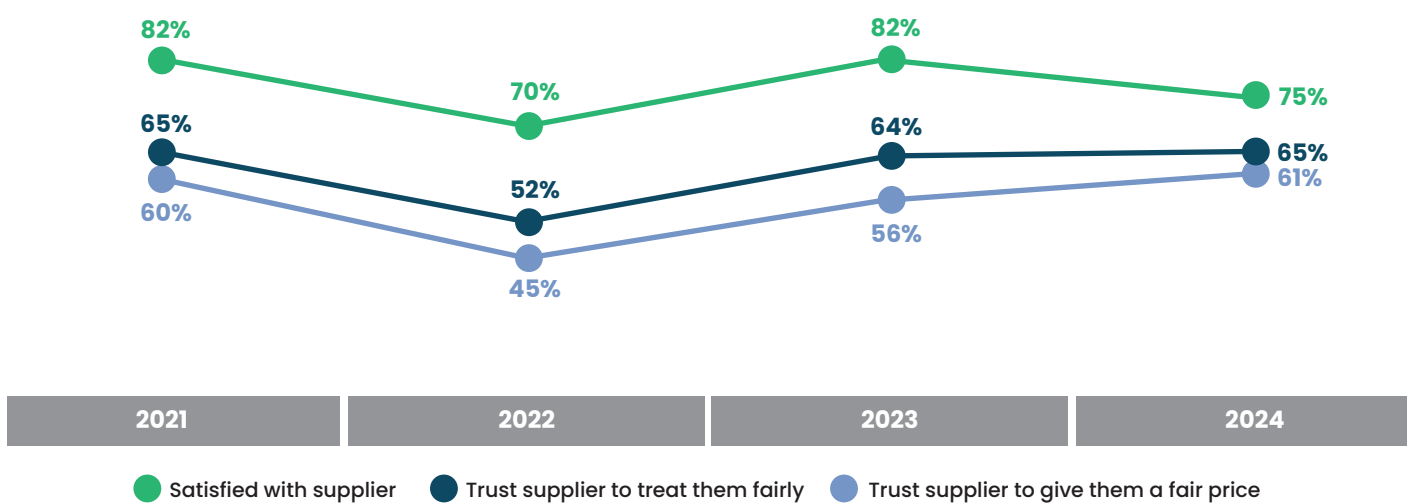
ELECTRICITY SUPPLIER SATISFACTION AND TRUST LEVELS



GAS

Overall satisfaction with service from gas suppliers also remained high (75%). Similar to electricity, more respondents reported feeling ‘satisfied’ (61%) than ‘very satisfied’ (13%) with the service they had received.

GAS SUPPLIER SATISFACTION AND TRUST LEVELS



02. PAYMENT DIFFICULTIES

Participants were asked questions to help understand their experiences of payment difficulties. This included questions on their ability to pay for their electricity or gas, whether they had borrowed money to pay for their energy and whether they had gone without other essentials to pay for their energy.

The overall proportions of respondents who said that they were struggling to pay for their electricity or gas have fallen this year. However, some groups were found to be struggling more than others.

PAYMENT DIFFICULTIES

Overall, fewer electricity and gas consumers reported struggling to pay their bills compared to 2023 and 2022.

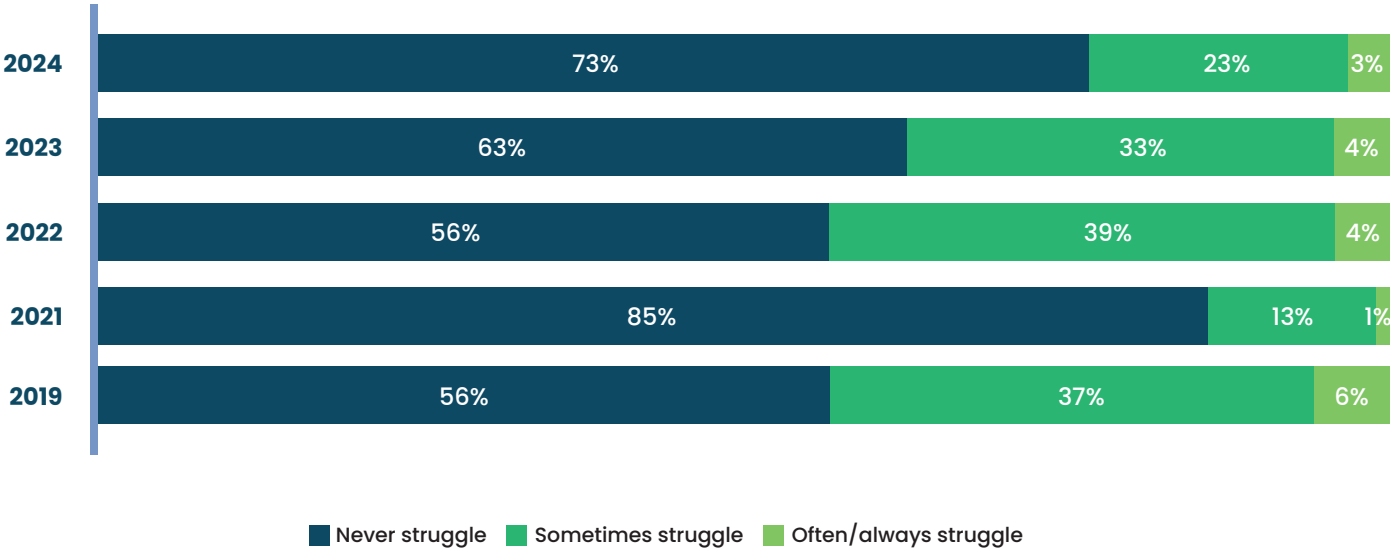
- **23%** of electricity respondents said that they had sometimes struggled to pay for their electricity over the last year. A further **3%** often or always struggled.
- **27%** of gas respondents said that they had sometimes struggled to pay for their gas over the last year. A further **2%** often or always struggled.

ELECTRICITY

RESPONDENTS' ABILITY TO PAY THEIR ELECTRICITY BILL

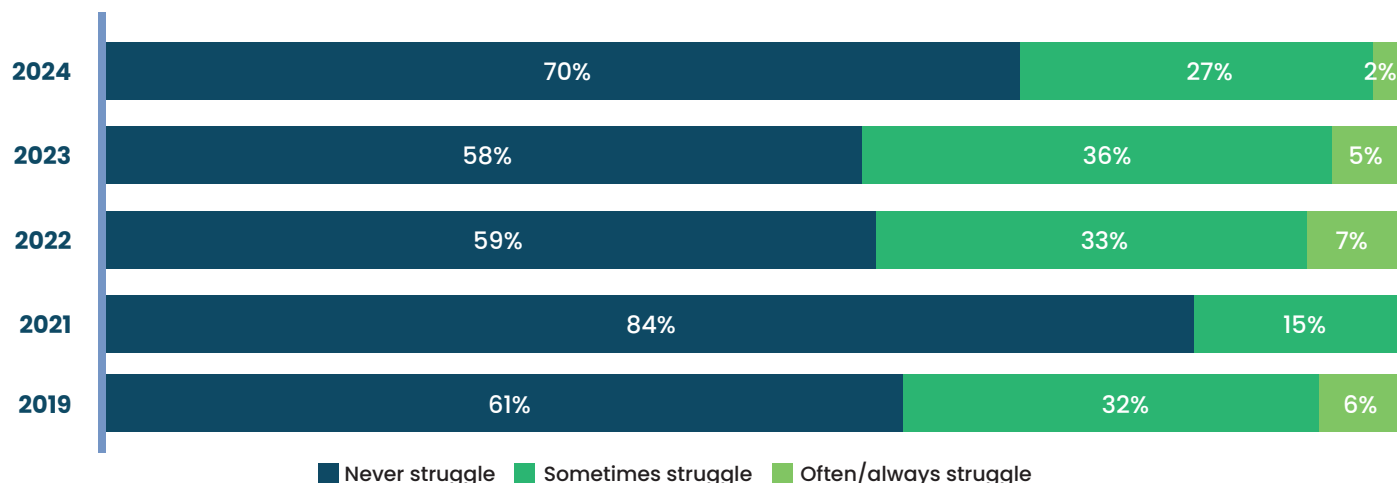
23% Sometimes struggle to pay their bill
DOWN FROM 33% IN 2023

3% Often or always struggle to pay
SIMILAR TO 4% IN 2023



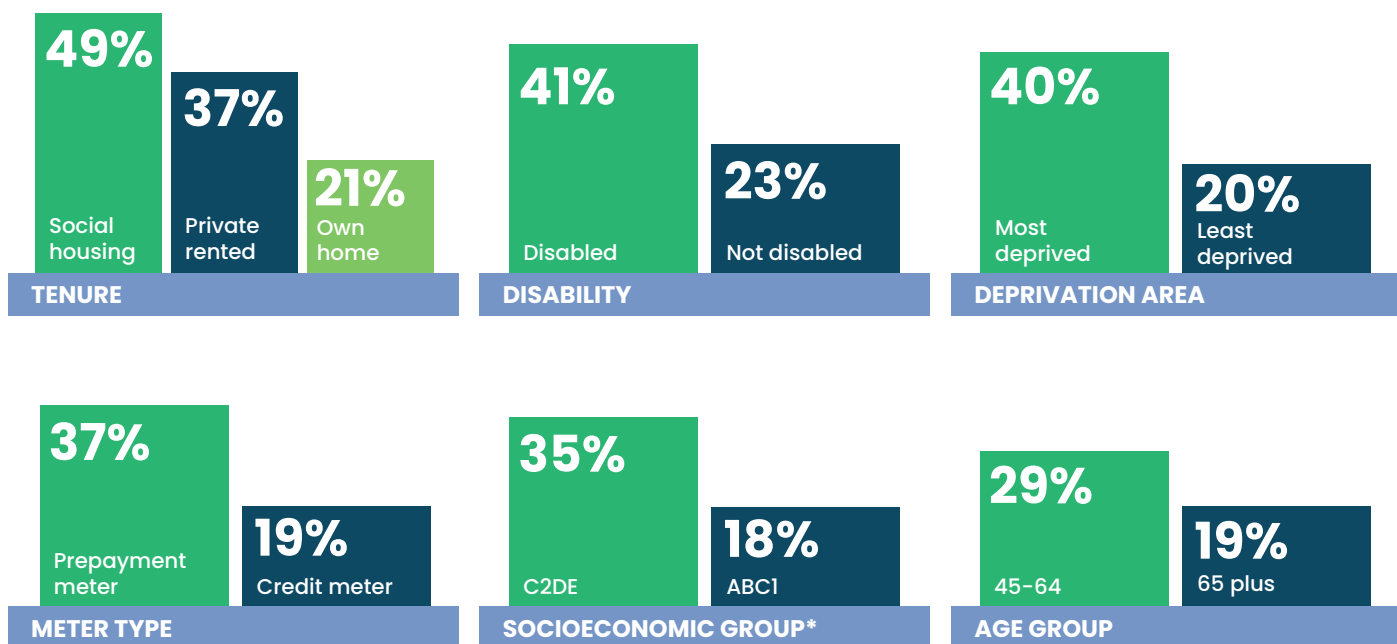
27% Sometimes struggle
to pay their bill
DOWN FROM 36% IN 2023

2% Often or always
struggle to pay
SIMILAR TO 5% IN 2023



GROUPS STRUGGLING TO PAY

Further analysis found that some groups were significantly more likely to sometimes, often or always struggle to pay for their energy than others¹. Those who were disabled, prepayment meter customers, those who live in social housing, private renters, those in the most deprived areas and those aged 45–64 were more likely to struggle to pay for their electricity.



¹ Full breakdowns of all subgroup analysis for payment difficulties are included in the main report in chapter 9.

* The ABC1 group consists of people working in higher, intermediate and junior managerial, administrative, professional occupations. The C2DE group consists of people working in skilled, semi-skilled, and unskilled manual occupations, as well as those who are unemployed.

Some participants had gone without other essentials or borrowed money so that they could pay for their energy:

6% of electricity and 8% of gas respondents had to **delay or go without other essentials** so that they could pay for their energy bills.



5% of electricity respondents and 6% of gas respondents had **borrowed money** to pay their energy bills.



16% of those who have or live with someone who has a disability or illness reported they had to go without essentials at least once to pay for their electricity, compared to 4% of those who do not have someone with a disability or illness in their household.

REDUCED ENERGY USAGE

Fewer consumers have reduced their energy usage this year, but this follows several years of considerable reductions in energy usage.

- **42%** of respondents reported that they have reduced their electricity usage over the last year. This follows on from **71%** who had reduced their usage in 2023 and **85%** who had reduced their usage in 2022.
- **42%** of respondents had reduced their gas usage, following on from **71%** who had reduced their gas usage in 2023 and **87%** who had reduced usage in 2022.

24%



of respondents with an electricity prepayment meter reported that they had run out of credit on their meter and had gone without electricity over the past year. Of those who had gone without electricity, 38% reported that it was because they could not afford to top up.

67%



of respondents indicated that they would be content for their supplier to contact them to discuss if they needed any supports if they noticed they had reduced their energy usage. This is the first time we have asked this question.

03. PROTECTIONS AND SUPPORTS

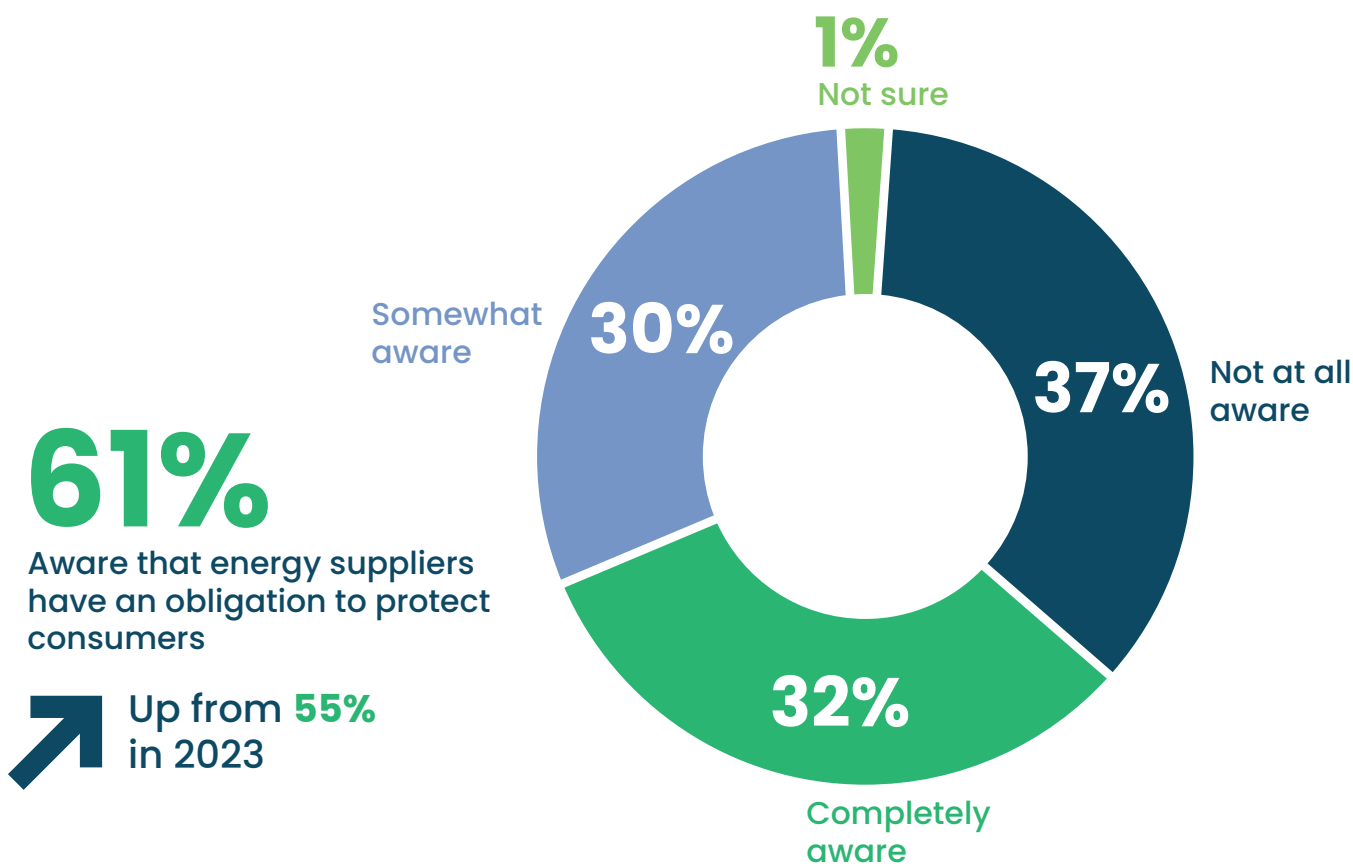
Participants were asked questions about their awareness of the protections and supports offered by suppliers and about their use of available support services.

There has been an increase in overall awareness that suppliers have obligations to protect consumers.

The proportion of respondents who are aware that their energy supplier has supports in place for vulnerable consumers and who also know a bit about the services offered has decreased. The number of vulnerable consumers availing of these support services remains very low.

OVERALL AWARENESS OF PROTECTIONS

There has been an increase in the percentage of consumers who are aware that energy suppliers have an obligation to protect consumers. **61%** of all respondents were somewhat or completely aware that energy suppliers have obligations to protect them. This represents an increase from **55%** in 2023.

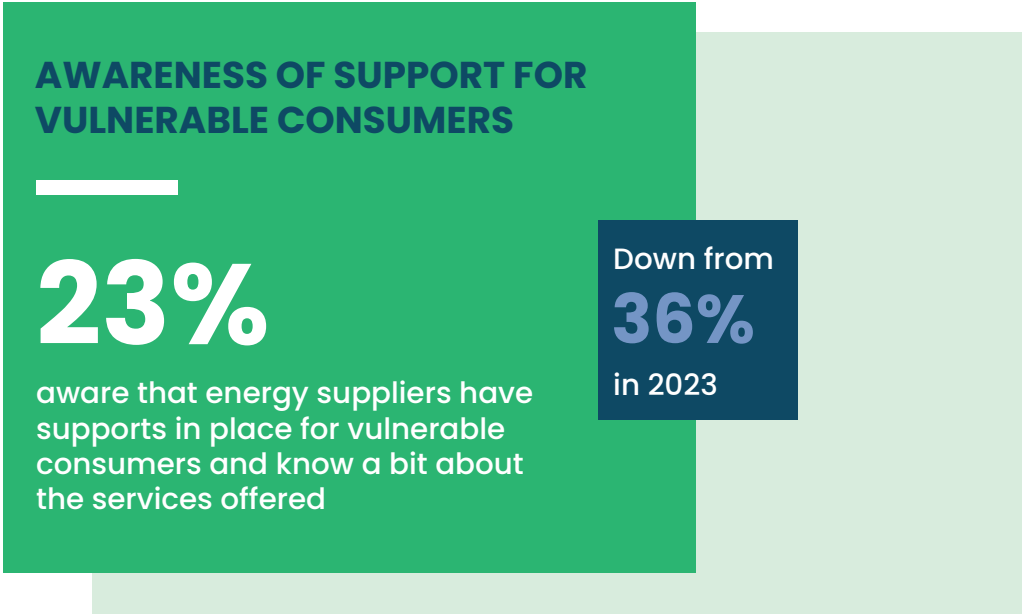


The proportion of consumers who reported that they are completely aware that energy suppliers have obligations to protect them has decreased slightly from **39%** in the previous tracker to **32%** in 2024.





* Percentages in this chart have been rounded to the nearest whole percent. Totals combining percentages may not sum due to rounding.

AWARENESS OF SUPPORTS AND UPTAKE AMONG VULNERABLE CONSUMERS

The percentage of domestic consumers who are aware that their energy supplier has supports in place for vulnerable consumers and who know a bit about the services offered has decreased from **36%** in 2023 to **23%** in 2024.



UPTAKE OF THESE SERVICES REMAINS VERY LOW:

-  **1%** of respondents overall reported that they had signed up to Northern Ireland Electricity Network’s Critical Care Register.
-  **1%** of respondents overall reported that they had signed up to their supplier’s Customer Care Register.
-  **2%** of respondents who would be considered vulnerable had signed up for support services.
-  **7%** of those who have or live with someone who has a disability or illness had signed up for support services.

Awareness of the support services offered to vulnerable customers by Northern Ireland Water has also decreased, with **9%** saying they knew about the services compared to **23%** in 2023.

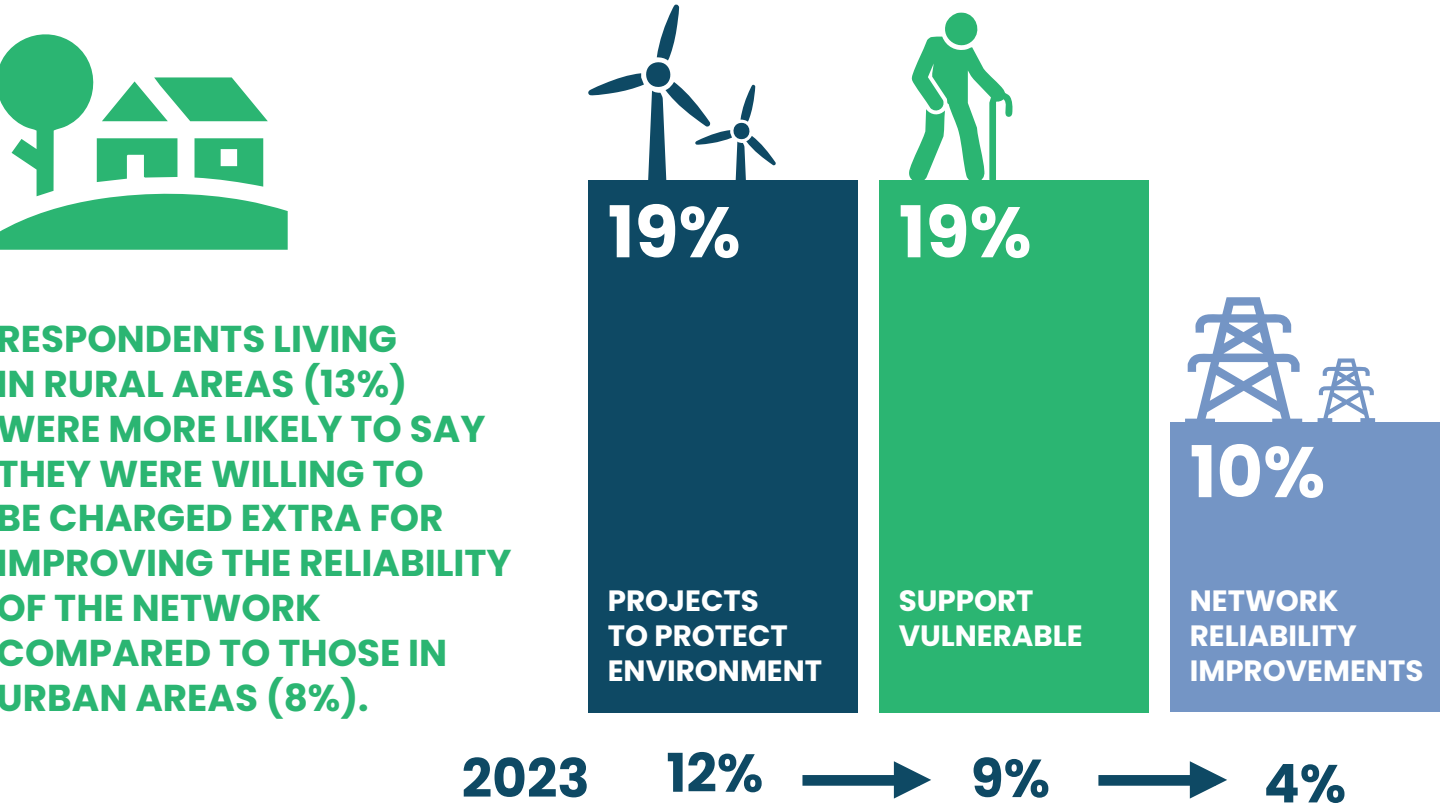
04. WILLINGNESS TO PAY EXTRA ON BILLS

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.

Overall, there was a greater willingness to spend extra on all the areas they were asked about, including paying extra on bills to allow certain consumer groups to avail of a discounted tariff.

WILLINGNESS TO PAY EXTRA ON THEIR BILLS FOR PROJECTS AND PROTECTIONS

Respondents were asked if they would be willing to pay a little extra on their bills for future investments including for projects to protect the environment, extra help for vulnerable consumers and to improve the reliability of the network. There was an increase in willingness to pay more for these projects from 2023.



For the first time, respondents were asked if they would be willing to pay extra on their bill to provide a discounted tariff for certain consumer groups.

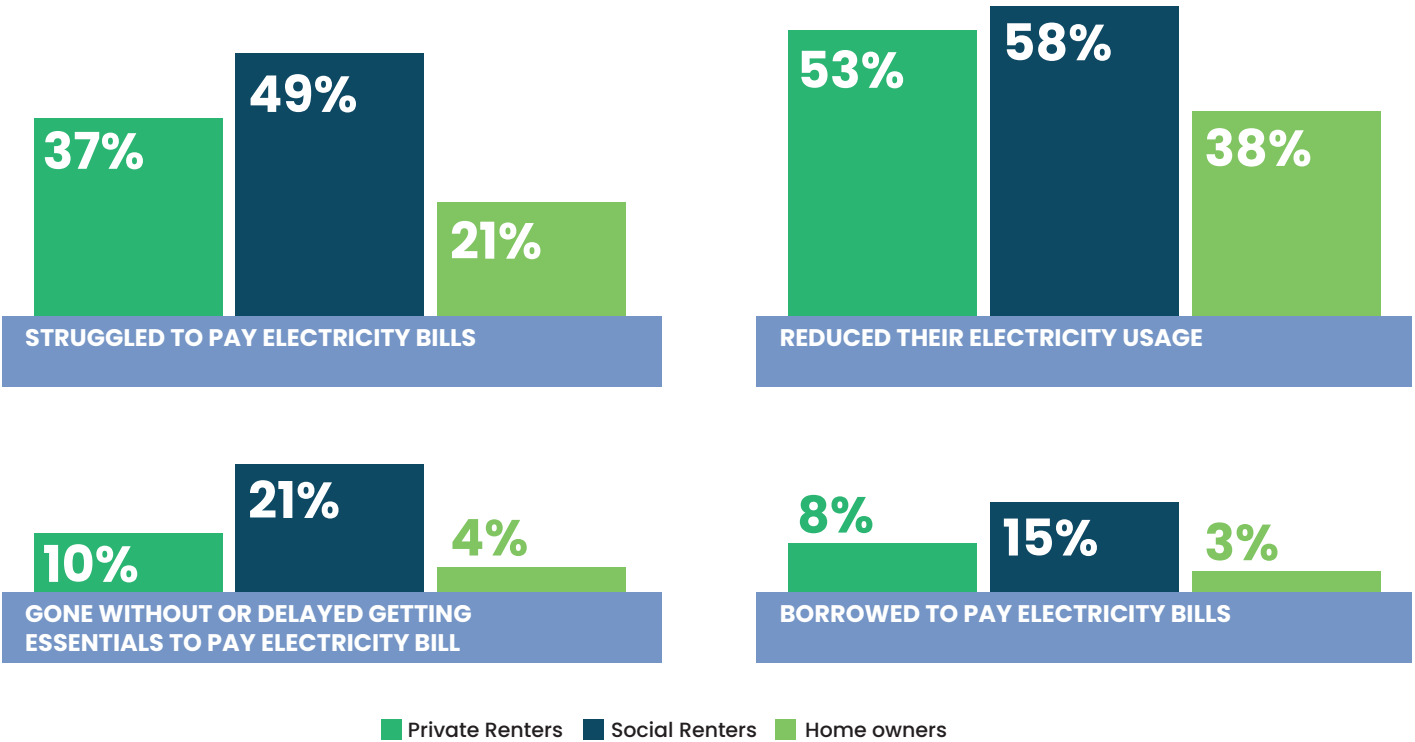
27% would be willing to pay extra on their bill to provide a discounted tariff for certain groups

05. SPOTLIGHT ON HOUSING TENURE

Analysis was completed to understand any differences in experiences between different consumer groups. This section looks specifically at any significant differences by housing tenure. Private renters and those living in social housing were significantly more likely than homeowners to experience payment difficulties, less likely to engage with their energy contract and less likely to be aware of protections and supports.

PAYMENT DIFFICULTIES

Social³ and private renters were more likely to report struggling to pay for their electricity. They were also more likely to report reducing their electricity usage, delaying getting essentials to pay their electricity bill and borrowing to pay their electricity bill.



AWARENESS OF PROTECTIONS

Private renters and those living in social housing were less likely to be aware that suppliers have obligations to offer protections to consumers than those who own their own home.

64% of those who own their own home were aware that energy suppliers have obligations to protect consumers compared to 55% of those who privately rent and 53% of those who live in social housing.



³ Social renters were defined as those who rent their home from the Northern Ireland Housing Executive or from a Housing Association.

AWARENESS OF SUPPORT SERVICES

63% of those who privately rent had not heard of the support services offered by energy suppliers, in comparison with 54% living in social housing and 50% of homeowners.

OVERALL



PRIVATE RENTERS



SOCIAL RENTERS



OWNER OCCUPIED



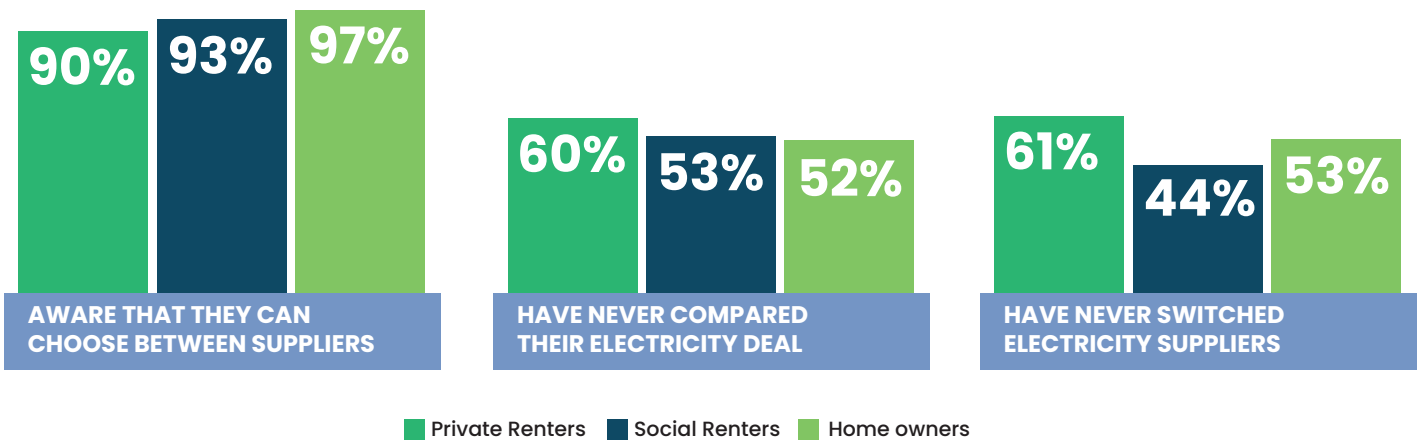
* Totals do not add to 100% as 'not sure' responses are not included.

Respondents who privately rent (18%) and who live in social housing (15%) were also less likely to be aware of the support services offered by NI Water when compared to those who own their home (23%).

ENGAGEMENT WITH SUPPLIERS

Private renters were less likely than those who live in social housing or who own their own home to have read the latest correspondence from their electricity or gas provider. They were most likely to not open this correspondence.

Private renters also were less likely to be aware that they can choose between electricity deals than homeowners or those living in social housing. Additionally, they are more likely to have never compared their electricity deal or to have never switched suppliers.



METHODOLOGY

In total, 1,502 participants completed a telephone survey interview between October 2024 and January 2025. Participants in the survey were domestic energy bill payers. A stratified random sampling approach was used, which ensures that the participants who took part in the survey are representative of households in Northern Ireland. Demographic 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.

Subgroup analysis was completed where sample size allowed. This enables us to understand if there are any statistically significant differences between the experiences or attitudes of different groups.

The confidence level for the survey was 95%. The margin of error for the overall survey (1,502 respondents) was plus or minus 2.5%. This means that we can be 95% confident that the true value for the Northern Ireland population will lie within a range that is plus or minus 2.5% of the survey estimate. For filter questions, including those asked only to gas consumers (542 respondents), margin of error is wider.

Percentages in the report have been rounded. Some totals may not sum to 100% due to rounding.

CONSUMER PROTECTION PROGRAMME

The domestic consumer insight tracker survey is completed each year as part of UR's Consumer Protection Programme. Further information on our Consumer Protection Programme for 2024 to 2029 (CPP 2024) can be found on our website.

A copy of the full domestic consumer insight tracker survey report prepared by Perceptive Insight can be accessed on our website.

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