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Domestic Consumer Insight Tracker Survey

Report prepared for the Utility Regulator

June 2025

Utility Regulator

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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 valuable insight into consumer[1] engagement, experience and attitudes in the domestic energy market in Northern Ireland.

This is a follow-up survey to the Domestic Trackers conducted in 2019, 2021, 2022, and 2023 and comparisons with those studies have been made throughout this report, where appropriate.

Methodology

A telephone methodology was used to conduct the surveys. In total, 1502 interviews were completed, which were representative of the household population in Northern Ireland. Based on a 95% confidence level, a margin of error of +/- 2.5% is expected[2]. Interviewing took place between October 2024 and January 2025 with each interview taking, on average, 20 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

- 58% of respondents use oil to heat their homes, followed by 36% who have mains gas installed.
  - The proportion of domestic consumers with oil in their homes has decreased steadily from the first Tracker in 2019, in which under two thirds (64%) used oil heating.
  - The proportion who use gas heating has increased across the Trackers, with one quarter (25%) in 2019 stating that they have mains gas.
- 3% of domestic consumers have intentions to switch their home heating method in the next three years.
- 92% of domestic consumers are aware of who their electricity supplier is, with the most common being Power NI (56%) and SSE (22%).
- 94% of those with mains gas were able to recall who their gas supplier is, with the most common being SSE (60%) and then Firmus (35%).

[1] Where we refer to 'consumers' in the report, we are referring to survey respondents.
[2] For filter questions, including those asked only to gas consumers, margin of error is wider. Margin of error breakdowns are included at Table A3 in Appendix A.

- 25% had installed energy efficiency measures in their home within the last three years, similar to 26% in 2023. Of those who had not installed energy efficiency measures over the last three years, 37% said that their home came with them installed already and 37% had installed them more than three years ago. Loft insulation (65%), cavity wall insulation (47%) and double glazing (27%) were the most common measures implemented.
- 7% of domestic consumers use renewable energy systems or low carbon technologies in their home for heating or electricity, similar to 8% in 2023.

Payment

- 42% have electricity bills of at least £100 per month, similar to 43% in both 2023 and 2022, but higher than the 13% observed in 2021.
- The proportion of respondents paying £150 or more per month for their electricity has decreased slightly from 16% in 2023 to 13%.
- 41% of gas respondents have a monthly spend of at least £100, compared to 42% who reported this in 2023 and 48% in 2022, but still considerably higher than the 9% who reported spending £100 or more on gas in 2021.
- 39% of respondents use a prepayment meter for electricity, while 54% of respondents with mains gas pay for their heating via a prepayment meter.
- Convenience was the most often cited reason for having a prepayment meter (79% of those with an electricity prepayment meter and 75% of those with a gas prepayment meter).
- The proportion of consumers who reported that one of the reasons they use a prepayment meter is to monitor their energy usage has fallen from 2023, for both electricity and gas:
  - 9% of electricity consumers (compared to 33% in 2023); and
  - 8% of gas consumers (compared to 34% in 2023).
- The majority of electricity (96%) and gas (95%) consumers who use a prepayment meter indicated that they are content to remain using this method rather than change to alternative payment methods such as direct debit.
- 79% of electricity and 85% of gas customers stated that they were on a standard variable tariff, the same proportions as the 2023 Tracker.
- Support has increased for paying extra on bills for future investment since 2023:
  - 27% of respondents stated that they would be willing to pay extra on their bill for future investment (compared to 17% in 2023);
  - 19% would pay extra to provide help to vulnerable customers (12% in 2023);
  - 19% would pay extra for projects to protect the environment (9% in 2023); and
  - 10% would be willing to pay extra to improve the reliability of the network (4% in 2023).
  - Rural respondents (13%) were more likely than urban respondents (8%) to say they would be willing to pay extra to improve the reliability of the network.
- 27% indicated they would be willing to pay extra on their bill to allow particular consumer groups to avail of a discounted tariff.

Interactions with energy suppliers

- There has been a decrease in customer engagement with written communications received from their supplier. 42% of electricity customers reported reading their correspondence in full (compared to 50% in 2023), while 41% of gas consumers reported reading their correspondence in full (compared to 49% in 2023).
- Similar proportions reported receiving correspondence from their electricity supplier in the post (38%) and via email or online (38%), while gas customers were more likely to receive correspondence through the post (49%, compared to 27% through email or online).
- Of those respondents who had glanced at or read their written correspondence, there has been a decrease in understanding of this correspondence.
  - 76% of electricity respondents agreed or strongly agreed that the information was clear and understandable (compared to 83% in 2023); and
  - 73% of gas consumers agreed or strongly agreed that the information was clear and understandable (compared to 81% in 2023).
- Overall levels of trust in electricity suppliers were similar to those in 2023:
  - 67% trusted their supplier to treat them fairly (compared to 70% in 2023); and
  - 60% trusted their supplier to give them a fair price (compared to 61% in 2023).
- There has been a decrease in consumers who completely trust their electricity suppliers:
  - 16% of electricity consumers said they completely trust their supplier to treat them fairly (compared to 24% in 2023); and
  - 13% stated they completely trust their supplier to give them a fair price (compared to 22% in 2023).
- Similar levels of trust as in the previous Tracker were observed with gas consumers:
  - 65% trusted their supplier to treat them fairly (compared to 64% in 2023); and
  - 61% trusted their supplier to give them a fair price (compared to 56% in 2023).
- There has been a slight decrease in consumer satisfaction with overall service from suppliers:
  - 80% of domestic consumers reported being satisfied or very satisfied with their electricity supplier (compared to 84% in 2023); and
  - 75% were satisfied or very satisfied with their gas supplier (compared to 82% in 2023).
- 9% contacted their electricity supplier in the last year for a reason other than making a complaint. The most common reasons for this was; querying a bill (32%), switching energy contract (30%), and a payment issue (11%).
- Of those that made contact; 82% found it easy to get in touch, 77% thought they were listened to, 72% felt they were treated fairly, and 72% said that their electricity supplier was supportive.

Complaint handling

- 3% of electricity and 6% of gas respondents had made a complaint to their electricity or gas supplier in the past year.
- 3% stated that they had wanted to make a complaint to their electricity supplier and 4% to their gas supplier in the past but left it unreported.

Switching

- There was a high level of overall awareness (95% were completely or somewhat aware) of being able to choose between different electricity suppliers amongst respondents:
  - 75% of those consumers agreed that having this choice gives access to better deals (down from 83% in 2023);
  - 46% had compared electricity deals to see if they could switch supplier or tariff. This is a decrease from 53% in the 2023 Tracker; and
  - 36% of those who have the option to switch between gas suppliers said that they had compared gas deals. This is up from 32% in 2023.
- 48% of electricity consumers and 44% of gas customers were confident that they are on the best energy deal for them.
- 47% of domestic consumers have switched their electricity supplier at least once at any time, a decrease from 51% in the 2023 Tracker:
  - Of those who have ever switched, 75% have done so within the last three years (up from 71% in 2023);
  - In contrast, only 11% of those who have the option had switched gas suppliers.
- Respondents aged under 35, who privately rent, and who live in rural areas were among the subgroups who were less likely to have switched their electricity supplier at any time.
- Feeling they were overpaying (46%) and reacting to a promotional offer from another supplier (35%) were the main drivers for switching electricity supplier.
- 40% of electricity consumers who had switched did so through a doorstep seller, up slightly from 38% in 2023.
- 82% reported a positive experience with switching electricity supplier.
- Of those respondents who had never switched electricity supplier, 60% had never switched due to satisfaction with their current service, while 40% thought it would be too much hassle, increasing from 31% in 2023[3].
- Of those respondents who had never switched gas supplier 54% had never switched due to satisfaction with their current service, which is a decrease from 74% in 2023. 28% said it would be too much hassle, increasing from 15% in 2023.
- 16% of electricity and 10% of gas customers said they were likely to switch their supplier in the next 12 months.
- Confidence using the internet appears to influence the likelihood of comparing energy deals and of switching:
  - Almost all (96%) confident internet users were aware they could choose between electricity suppliers;
  - 52% of those who are confident internet users said they had compared electricity deals compared to 27% who are not confident; and
  - Two thirds (65%) of respondents who are not confident internet users said they had never switched electricity supplier, compared to 51% of confident users.

[3] Multiple choice question, therefore respondents could select more than one reason for never switching.

Payment difficulties

- The proportion of respondents who sometimes struggle to pay their electricity bills has decreased from 33% in 2023 to 23%:
  - 3% often or always struggle to pay, similar to 2023 (4%).
- For gas, the proportion of consumers who sometimes struggle to pay has also decreased from 36% to 27%:
  - The proportions who often or always struggle to pay has decreased from 5% to 2%.
- 24% of respondents with a prepayment meter reported that they had run out of credit on their meter and had gone without electricity over the past year.
  - This is an increase from 2023 in which 20% with a prepayment meter had gone without electricity.
  - Of those who had gone without electricity, 38% reported that it was because they could not afford to top up.
- 6% of consumers reported that they have had to delay or go without other essentials so that they could pay for electricity, a reduction from 9% in 2023.
- 8% reported delaying or going without other essentials to pay for gas compared to 10% in the 2023 Tracker.
- 42% of respondents have reduced their electricity usage over the last year, which follows on from 71% in the 2023 Tracker and 85% in 2022.
- 5% of electricity respondents had borrowed money to pay their electricity bills, similar to 6% in 2023.
- This was also true for gas customers, with 42% reducing their usage (71% in 2023 and 87% in 2022) and 6% borrowing money to pay their bill (10% in 2023).
- Respondents who have someone in their household with a disability or illness and who would be considered to be in the high or medium vulnerability group were more likely to indicate that they were sometimes struggling with their electricity bills, had gone without essentials to pay for electricity, had reduced their electricity usage, and had borrowed to pay their electricity bills.
  - This was also the case for those on a prepayment meter for electricity, who had switched electricity supplier in the last three years, and who had self-disconnected from their electricity supply in the last year.

Consumer protections

- Awareness of consumer protections has increased across the Trackers, with 61% indicating awareness in 2024 compared to 55% in 2023, 51% in 2022, and 49% in 2021.
  - However, the proportion who are completely aware has decreased from 39% in the previous Tracker to 32% in 2024.
  - Respondents living in social housing (47%) and who privately rent (43%) were less likely to be aware of these protections, as were those who have a prepayment meter for electricity (43%) and for gas (41%) and who had self-disconnected from their electricity supply (46%).
- Three quarters (76%) 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, compared to 80% in 2023.
- Respondents who have someone in their household with a disability or illness (30%), who are in the high or medium vulnerability group (25%), and who had self-disconnected from their electricity supply (35%) were less likely to know how to make a complaint.

Support services

- 47% of respondents were aware of the support services offered by energy companies, including 23% who knew a bit about the services offered.
  - This compares to 51% who were aware overall and 36% who knew about the services offered in the 2023 Tracker.
  - Respondents in the C2DE group (55%), who privately rent (63%) and who have children in their household (58%) were less likely to be aware of the support services.
  - 2% of all participants were signed up to or had utilised some of the support services offered by energy companies.
- The majority (98%) of those in the high or medium vulnerability group had not signed up to utilise any of the support services offered by energy companies. 93% who have or live with someone who has a disability or illness had not signed up for any of these support services.
- One fifth (20%) were aware of the services for vulnerable consumers that NI Water provides, a decrease from 32%.
- 67% of respondents indicated that, if they had reduced their energy usage, they would be content for their energy supplier to contact them to discuss if they needed any support services.

Just Transition to Net Zero

- Half (50%) of respondents had never heard of the term 'Just Transition to Net Zero.'
- One fifth (20%) of respondents said they have a 'fair' or 'good' understanding of what is meant by the 'Just Transition to Net Zero', with a further 13% reporting they have 'a little' understanding of the term. A further 18% had heard of the term but didn't know much about it.
- 28% thought that the NI Assembly was most responsible for supporting the Just Transition, and one quarter (25%) thought the responsibility was with Westminster.

Conclusions and recommendations

Consumers may have adapted to higher energy costs

Electricity spend has remained consistent with the previous two Trackers, with 42% reporting a monthly electricity spend of £100 or more compared to 43% that was observed in both 2022 and 2023; considerably higher than the 13% who stated this in 2021. It should also be noted that the proportion spending £150 or more decreased from 16% in 2023 to 13%. Those spending £100 or more on their heating[4] per month increased from 41% to 45%, although more consumers are now aware of their monthly heating spend compared to the 2023 Tracker.

Fewer respondents reported that they were struggling to pay their electricity and gas bills, while the proportion that said they had reduced their electricity and gas usage has also decreased from the 2023 Tracker. One possible explanation for this is that respondents had already reduced their energy usage in response to higher energy costs in previous years.

[4] All types of heating, including gas.

There is also greater willingness to spend extra on energy bills to support future investment with over one quarter (27%) indicating that they would be willing to pay extra on their bill to support investment, compared to 17% in 2023. 27% said they would be willing to pay extra on their bill to allow particular consumer groups to avail of a discounted tariff. There was a slight decrease in the amount of respondents who stated they had gone without or delayed getting essentials to pay for their energy.

Consumer engagement with energy suppliers has fallen

One potential impact of domestic consumers adapting to higher energy spends is that they may have become less engaged in their energy bill. In 2023, half (50%) said they read the last written correspondence they received from their electricity supplier, and half (49%) read the last written correspondence from their gas supplier. In 2024, the corresponding figures fell to 42% for electricity and 41% for gas. Those that only glanced at the correspondence increased from 16% to 26% for electricity customers and 15% to 20% for gas customers between 2023 and 2024. The percentage of gas customers who said they did not look at or open the correspondence increased from 8% to 17%.

The proportion of electricity customers who said they distrust their electricity supplier to treat them fairly in their dealings fell from 17% in 2023 to 12%, while those that said they distrust their supplier to provide a fair price decreased from 21% to 17%. However, rather than an increase in the proportion who said they trusted their supplier in these areas, there was instead an increase in those that said they neither trusted nor distrusted their supplier. This was also evident when respondents were asked to rate their satisfaction with the overall service their supplier provides. In 2023, 9% of both electricity and gas customers said they were neither satisfied nor dissatisfied with the service provided, compared to 14% for electricity and 17% for gas customers in 2024. This increase in apathy was also evident in respondent's attitudes to comparing energy deals. 15% neither agreed nor disagreed that having a choice of suppliers gives access to better electricity deals, compared to 7% who stated this in 2023. Under one fifth (18%) reported that they found it neither easy nor difficult to compare different deals for electricity, increasing from 7% in 2023.

Another area in which engagement has fallen is in levels of awareness in comparing energy deals. 89% of respondents in 2023 said they were completely aware that they could choose between different electricity suppliers, with this falling to 70% in 2024. Incidence of comparing electricity deals decreased from 53% in 2023 to 46%.

Domestic consumers who had self-disconnected from their electricity supply were less likely to be aware of the format that they receive written correspondence from their supplier and to report that they only glanced at the correspondence. These respondents were also less likely to be aware of supplier obligations to protect customers, and to know how to make a complaint if these obligations are not being met. Other subgroups who were more likely to demonstrate lower engagement included those on prepayment meters and older consumers aged 65 and over. Further discussion on these groups is included later in the conclusions.

Fall in awareness of support services

The percentage of domestic consumers who are aware of services offered by energy companies to support vulnerable customers has decreased from 51% in 2023 to 47% in 2024, while the proportion who know about the services offered decreased from 36% in 2023 to 23% in the current Tracker. The uptake of these services also remains very low, with 98% of respondents saying they had not used any support services, including 98% of respondents who would be considered vulnerable and 93% of those who have or live with someone who has a disability or illness.

Awareness of the support services offered to vulnerable customers by NI Water has also decreased, with almost 9% saying they knew about the services compared to under one quarter (23%) in 2023, while overall awareness decreased from one third (32%) to one fifth (20%) between 2023 and 2024. Respondents in the high and medium vulnerability group and those who have someone in their household with a disability or illness were less likely to report that they knew about these services.

Vulnerable subgroups more likely to be struggling with energy bills

Subgroup analysis revealed that vulnerable subgroups were more likely to report that they were struggling with their energy bills. Despite there being no significant differences with their counterparts in terms of their electricity spend, respondents who have someone living in their household with a disability or illness (36%, compared to 21% without) and those who are in the high or medium vulnerability group (26%, compared to 20% not considered to be vulnerable) were more likely to state that they sometimes struggle to pay their electricity bills.

These groups were also more likely to have changed their behaviours to help pay their electricity bills. 16% of those who have someone in their household with a disability or illness had delayed or gone without essentials to pay for electricity compared to 4% without someone with a disability or illness in the household, while 9% of those in the high or medium vulnerability group had done the same in comparison with 4% who are not considered to be vulnerable. Respondents who have someone in their household with a disability or illness (55%) and those in the high or medium vulnerability group (45%) were more likely to have reduced their electricity usage in the last 12 months than those without someone with a disability or illness in their household (38%) and who are not considered vulnerable (39%). 13% who have someone in their household with a disability or illness and 6% in the high or medium vulnerability group reported that they had borrowed to pay their electricity bills in the past 12 months, compared to 3% without someone in their household with a disability and 3% who are not considered vulnerable.

It is notable that these subgroups were less likely to engage with the correspondence they receive from their supplier. Respondents who have someone in their household with a disability or illness (22%) and those in the high or medium vulnerability group (20%) were more likely than those without (16%) and those not considered to be vulnerable (15%) to not know how they receive correspondence from their electricity supplier.

Respondents who have children living in their household were also more likely to suggest that they were struggling, with this group more likely to report that they spend £100 or more per

month on electricity (57%, compared to 35% without children) and on heating (52%, compared to 41% without children). Those with children were more likely than those without to report that they sometimes struggle with their electricity bill (29%, compared to 21% without children), that they had gone without or delayed getting essentials to pay for electricity (9%, compared to 5% without children), and that they have had to borrow to pay their electricity (7%, compared to 4% without children) and gas bills (10%, compared to 4% without children).

Prepayment meter customers

The 2024 Tracker found that two in five (39%) respondents use a prepayment meter for electricity, while 54% of gas customers have a prepayment meter for heating.

Respondents who live in social housing and who privately rent were more likely to use a prepayment meter for electricity, as were those living in urban areas and those who had switched electricity supplier in the last three years. The following subgroups were more likely to have a prepayment meter for both electricity and their gas heating:

- Respondents aged 18 to 34 compared to those aged 65 and over;
- Respondents in the C2DE socio-economic group compared to those in the ABC1 group;
- Respondents living in the most deprived areas compared to those in the least deprived areas;
- Respondents who have someone in their household with a disability or illness compared to those who do not;
- Respondents who have children living in their household compared to those who do not; and
- Respondents in the high or medium vulnerability group compared to those who are not considered to be vulnerable.

Respondents who have a prepayment meter for electricity were more likely to be unaware of how they receive written correspondence from their supplier but were more likely to have switched electricity supplier at least once and within the last three years when compared to those on a credit meter. One third (33%) of those with a prepayment meter for electricity said that they sometimes struggle with their bill compared to 17% on a credit meter, while 35% of those with a prepayment meter for gas reported that they sometimes struggle compared to 17% on a gas credit meter. 12% of those with an electricity prepayment meter said they had gone without or delayed getting essentials to pay for their electricity bill. Both those who have a prepayment meter for electricity and for gas were more likely to have reduced their energy usage and to have borrowed to pay their respective bills.

Drivers for switching remain the same

47% of respondents reported that they had ever switched their electricity supplier. Of these consumers, 75% had switched within the last three years (‘switchers’). As in 2023, the most common drivers for switching electricity supplier were reacting to feeling they were overpaying, reacting to a promotional offer from another supplier, and reacting to an approach by a doorstep seller. Switching via a doorstep seller was also the most likely method of switching electricity supplier.

The proportion of respondents who said they would be likely to switch electricity supplier in the next 12 months decreased to 16% from 25% in 2023, again suggesting there may now be less engagement in the energy market among domestic consumers. Those who had already switched supplier in the last three years were more likely to say they would switch again in the next year and were also more likely to demonstrate engagement in other areas. Electricity switchers were more likely to be aware they can choose between different suppliers and that having a choice gives access to better deals, as well as being more likely to have compared deals and to have found it easy to do so. Greater awareness of supplier obligations to their customers and of energy supplier support services was also evident in electricity switchers when compared with non-switchers.

Almost half (48%) of those who switched electricity supplier in the last three years said they spend £100 or more on electricity per month, compared to 38% of non-switchers. Electricity switchers were more likely to report that they are struggling; 31% of switchers said they sometimes struggled with their bill over the past year compared to 19% of non-switchers. Switchers were also more likely to have gone without or delayed getting essentials in order to pay for electricity, and to have reduced their electricity usage and borrowed to pay their electricity bill in the past 12 months.

Older consumers struggling less but have similar engagement with their energy contract as younger respondents

One third (34%) of domestic consumers aged 18 to 34 and of those aged 65 and over reported that they spend £100 or more on electricity per month, but it is consumers in the older age group who were less likely to be struggling with their electricity bill. 17% of those aged 65 plus said they sometimes struggle with their electricity bill compared to 25% in the younger age group. Older respondents were also less likely to have gone without or delayed getting essentials in order to pay for electricity, reduced their electricity usage, and to have borrowed to pay their electricity bill than those aged under 35.

Older respondents demonstrated more engagement with the correspondence received from their electricity supplier, with those aged 65 and over more likely to read it compared to those aged 18 to 34, who were more likely to report that they did not open the last piece of correspondence they received. Younger respondents were also less likely than all other age groups to report that they were aware that they can choose between different electricity suppliers.

However, the results from the 2024 Tracker found that younger consumers were more proactive with their electricity deal. While those aged under 35 and 65 and over were more likely to say they had never switched electricity supplier, of those who had switched supplier, it was those in the younger age group that were more likely to report switching within the last three years. Those aged 65 and over were more likely to report being happy with their current service as a reason for not switching, with 84% in the older age group saying they were satisfied with the overall service provided by their electricity supplier compared to 77% in the younger age group.

Private renters and social housing occupants struggling with their bills

Domestic consumers who privately rent their home and who live in social housing were more likely to report difficulties with their energy bills. Private renters (31%) and social housing occupants (42%) were more likely to sometimes struggle to pay their electricity bill, with those in social housing also more likely to always struggle to pay their bills (5%). Both groups were also more likely to have gone without or delayed getting essentials to pay for their electricity, and to have reduced their electricity usage and borrowed to pay their electricity bills in the past year. In terms of respondents who had gas heating, those who live in social housing were more likely than those who own their home to sometimes struggle with their gas bill; to have gone without or delayed getting essentials, to have reduced their gas usage, and to have borrowed to pay their gas bills in the past year. This is despite respondents who own their home being more likely to spend £100 or more per month on electricity and heating than those in social housing.

Compared with those who own their home, respondents who privately rent and live in social housing were less likely to show engagement with their energy deal. Both groups were less likely to be aware of how they receive written correspondence from their electricity and gas supplier, with private renters more likely to say they did not open the correspondence they received. Private renters were also less likely to be aware that they can compare electricity deals, to have actually compared their deal, and were more likely to have never switched their electricity supplier.

In terms of awareness of supplier obligations to protect their customers, 53% of those in social housing and 55% of private renters said they were aware of these obligations, compared to 64% of respondents who own their home. 36% of those who privately rent had heard of the support services offered by energy suppliers, in comparison with 46% living in social housing and half (50%) of homeowners. Social housing occupants and private renters were also less likely to be aware of NI Water's support services.

Impact of low confidence in using the internet

16% of respondents rated themselves as being not confident as an internet user (i.e. rated 1 or 2 on a five-point scale). Respondents who rated themselves as being not confident with using the internet were more likely to be unaware of how much they spend on electricity or heating and were less likely to know the format in which they receive correspondence from their electricity supplier. Of those who did report receiving correspondence, it was those who rated themselves as confident internet users who were more likely to say the information was presented in a clear way to understand.

Those who are not confident internet users were more likely to report having to reduce their electricity usage. With regards to consumer protections, those who are not confident internet users were less likely to be aware of supplier obligations and how to make a complaint if these obligations are not met. It is therefore important that resources are made available to those who do not have access or who do not feel comfortable using the internet to allow them to remain engaged with their energy contract.

Low uptake of renewables

Less than 1% of domestic consumers reported that they use renewables or LCTs as their main heating source, while 7% use renewable energy systems for either heating or electricity in their home. The proportion of respondents who use energy efficiency measures has remained consistent, with one quarter (25%) putting measures in place in the last three years compared to 26% in 2023, while those who had not put any measures in place were more likely to say this was because they were already in the home or they had been installed more than three years ago.

Lack of knowledge about the 'Just Transition to Net Zero'

One of the objectives outlined in the Utility Regulator's Corporate Strategy 2024-2029 was 'Supporting the Just Transition to Net Zero'. In order to measure the level of knowledge of the just transition among domestic consumers a new section was added to the 2024 Tracker. Half (50%) of respondents had never heard of the 'Just Transition to Net Zero', with one fifth (20%) saying they had a fair to good understanding. Several subgroups were less likely to be aware of the term:

- 65 plus years olds compared to all other age groups;
- Those in the C2DE group compared to those in the ABC1 group;
- Those living in social housing compared to those who privately rent and own their home;
- Those who consider themselves to not be confident internet users compared to confident users;
- Those in the most deprived areas compared to those in the least deprived areas;
- Those on a prepayment meter for electricity compared to those on a credit meter; and
- Those who have not self-disconnected from their electricity supply compared to those who had self-disconnected.

It is notable that subgroups that were less likely to be engaged in their energy contract, namely over 65s and those on a prepayment meter, were also less likely to be knowledgeable about the 'Just Transition to Net Zero', and so it is important that domestic consumers are kept well informed of any changes to their energy deal following the push towards net zero.

2. Introduction

Background

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

To support its mission, the Utility Regulator has identified a need to better understand the domestic energy consumer perspective in Northern Ireland, in line with best practice, through direct interaction and statistically robust research with the segment. In August 2024, the Utility Regulator commissioned Perceptive Insight, an independent market research company, to conduct two annual domestic consumer insight Tracker surveys. The Tracker surveys measure consumer engagement, experience and attitudes on a number of areas within the domestic energy markets in Northern Ireland.

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

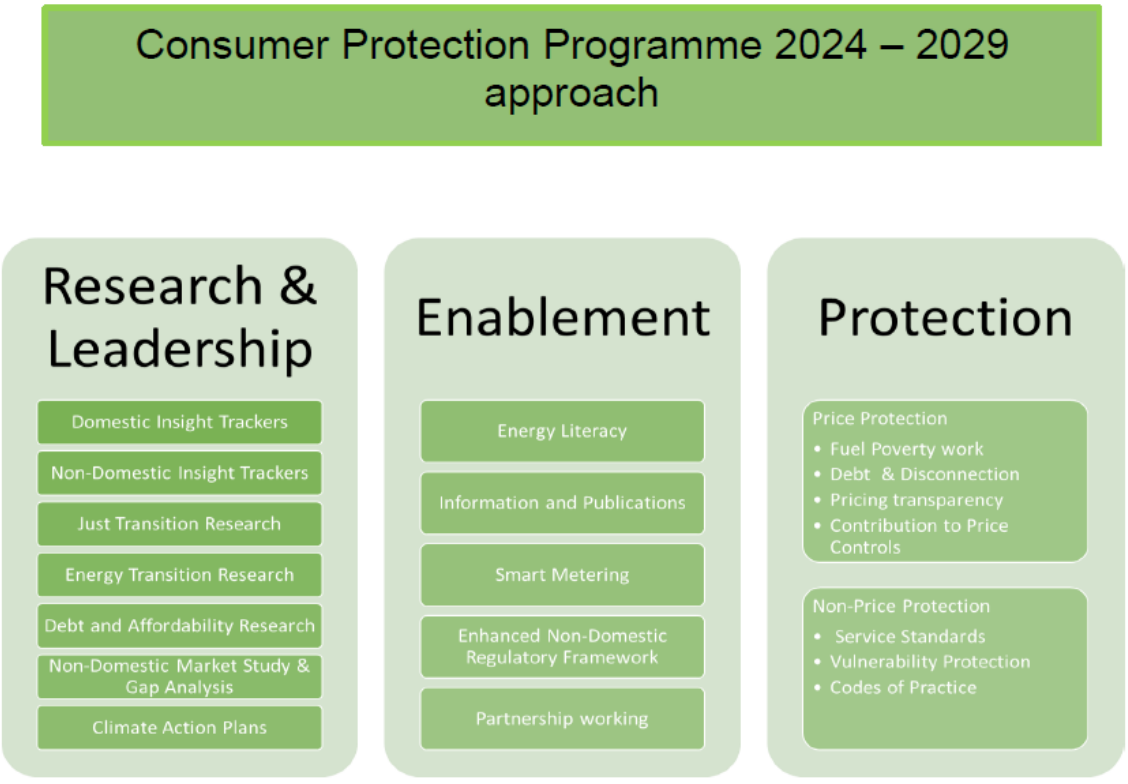
The research conducted through the Domestic Tracker aligns to the themes in both the Utility Regulator's Corporate Strategy 2024 - 2029 "Protecting Consumers on the way to Net Zero" and Consumer Protection Programme 2024 - 2029.

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

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

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

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



Research aims & objectives

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

The aims of the research were as follows:

- To measure consumer engagement, experience and attitudes in the domestic markets in Northern Ireland; and
- To highlight the issues that impact this consumer group and track how these may have changed over time based on the findings from the 2023, 2022, 2021 and 2019 baseline Tracker surveys.

This is a follow-up survey to the 2019, 2021, 2022 and 2023 Domestic Trackers. Comparisons between the results obtained in this survey have been compared with those from previous years where appropriate. While interviewing for the 2021, 2022, 2023 and 2024 Domestic Trackers were carried out by telephone, the 2019 Tracker was conducted using a face-to-face methodology. This should be considered when interpreting any differences in results between 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;
- Just Transition to Net Zero; and
- Support services;

Percentages cited in this report were calculated using unrounded figures then rounded to the nearest whole percent. Percentages for categories in the charts therefore may not sum to 100% due to rounding. Percentages cited that combine multiple response categories may not be equal to the sum of the rounded percentages for these categories. Results displayed within the tables as '-' indicate that no participants provided this response. Results displayed as 0% indicate that at least one participant gave this response, but due to rounding it equates to less than 1% of the base. Where relevant statistically significant results exist at the 95% confidence level, these are clearly highlighted.

Margin of error is used to determine precision within research by indicating the extent to which the results obtained differ from what would be expected in the real world. 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 between October 2024 and January 2025, with each interview taking, on average, 20 minutes to complete. Interviewing was carried out in compliance with the UK GDPR 2018 and the Market Research Society Code of Conduct.

Questionnaire design

The questionnaire was designed in collaboration with the Utility Regulator project team and was initially based on the 2019 Tracker questionnaire. The questionnaire is reviewed each year and minor changes may be made to either add new questions or to remove 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 46% of electricity customers and 67% of gas customers use prepayment meters[5]. 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.

[5] https://www.uregni.gov.uk/files/uregni/documents/2024-12/Q3%202024%20QREMM%20report_1.pdf

Quintiles of deprivation

Using the Northern Ireland Multiple Deprivation Measure (2017)[6] 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[7]. 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 2023, 2022, 2021 and 2019 Domestic Trackers, which allows for comparisons over time.

Disability or illness

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

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

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

[7] http://www.consumercouncil.org.uk/sites/default/files/original/Consumer_Council_response_to_UR_consultation_on_the_review_of_the_effectiveness_of_competition_FINAL.pdf

Vulnerability

Three levels of vulnerability are identified within the report:

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

For the purpose of this report, those respondents in the 'high' and 'medium' vulnerability category are grouped together, while those in the 'low' vulnerability group and those with no vulnerabilities will be considered separately. This approach replicates that taken for the 2019, 2021, 2022 and 2023 Domestic Trackers.

Self-disconnection

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

Respondent demographics

Age, gender, SEG, location and deprivation

The table below indicates the final survey responses achieved by age, gender, socio-economic group, location and deprivation.[8]

STRATIFICATION VARIABLE		ACHIEVED NO.	ACHIEVED %
Age (HRP)	18 - 34	213	14%
	35 - 44	271	18%
	45 - 64	592	39%
	65 and over	426	28%
	Prefer not to say	0	-
Gender	Male	773	51%
	Female	729	49%
	Other	0	-
SEG[9]	ABC1	731	49%
	C2DE	733	49%
	Prefer not to say	38	3%
Urban/Rural	Urban	929	62%
	Rural/Mixed	573	38%
Council	Antrim and Newtownabbey	123	8%
	Ards and North Down	139	9%
	Armagh City, Banbridge and Craigavon	164	11%
	Belfast	269	18%
	Causeway Coast and Glens	122	8%
	Derry City and Strabane	121	8%
	Fermanagh and Omagh	88	6%
	Lisburn and Castlereagh	123	8%
	Mid and East Antrim	99	7%
	Mid Ulster	123	8%
	Newry, Mourne and Down	131	9%
Multiple Deprivation Measure quintile	1 – Most deprived	271	18%
	2	301	20%
	3	315	21%
	4	314	21%
	5 – Least deprived	301	20%
Total		**1502**	**100%**

[8]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]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

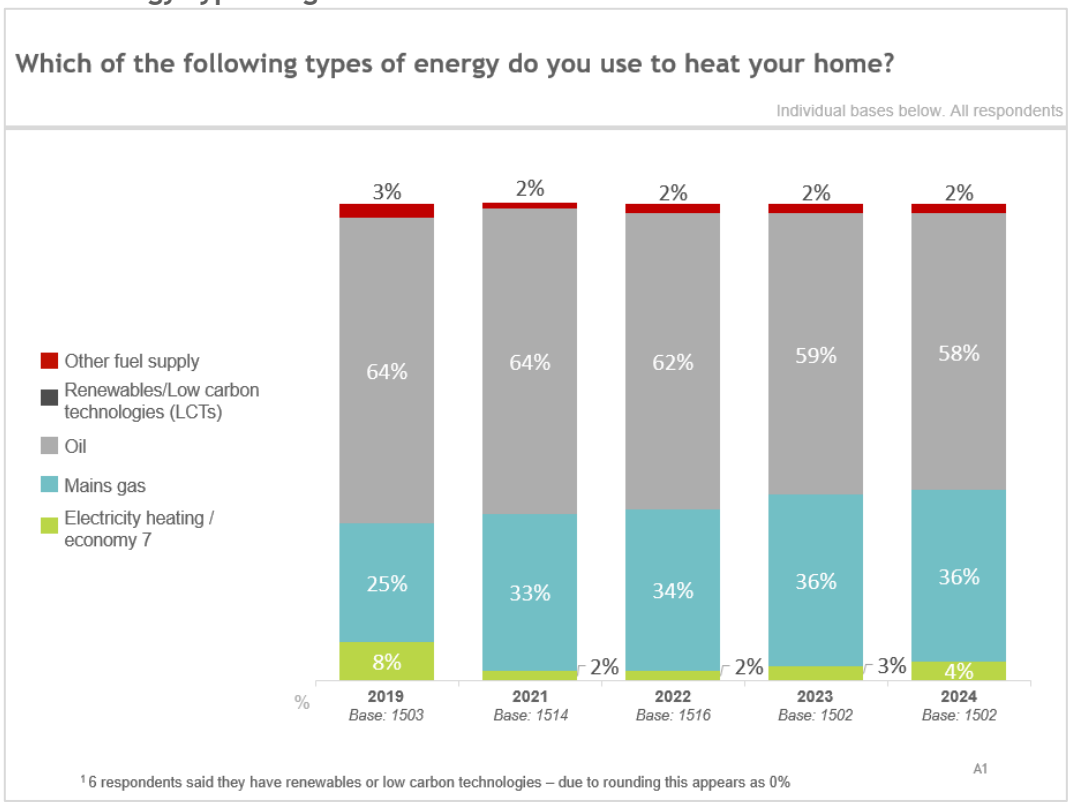
Key findings

- 58% of respondents use oil to heat their homes, followed by 36% who have mains gas installed.
  - The proportion of domestic consumers with oil in their homes has decreased steadily from the first Tracker in 2019, in which under two thirds (64%) used oil heating.
  - The proportion who use gas heating has increased across the Trackers, with one quarter (25%) in 2019 stating that they have mains gas.
- 3% of domestic consumers have intentions to switch their home heating method in the next three years.
- 92% of domestic consumers are aware of who their electricity supplier is, with the most common being Power NI (56%) and SSE (22%).
- 94% of those with mains gas were able to recall who their gas supplier is, with the most common being SSE (60%) and then Firmus (35%).
- 25% had installed energy efficiency measures in their home within the last three years, similar to 26% in 2023. Of those who had not installed energy efficiency measures over the last three years, 37% said that their home came with them installed already and 37% had installed them more than three years ago. Loft insulation (65%), cavity wall insulation (47%) and double glazing (27%) were the most common measures implemented.
- 7% of domestic consumers use renewable energy systems or low carbon technologies in their home for heating or electricity, similar to 8% in 2023.

Type of energy used to heat the household

The following charts provide a breakdown of respondents by the type of energy used to heat their household. Respondents who used more than one type of energy to heat their home were asked to select the source of heating that they predominantly used. The source of energy most likely to be used was oil, with 58% of respondents confirming that they have this in their home. Over one third (36%) reported that they had mains gas, no change from the 2023 Tracker.

Figure 4.1 Energy type usage

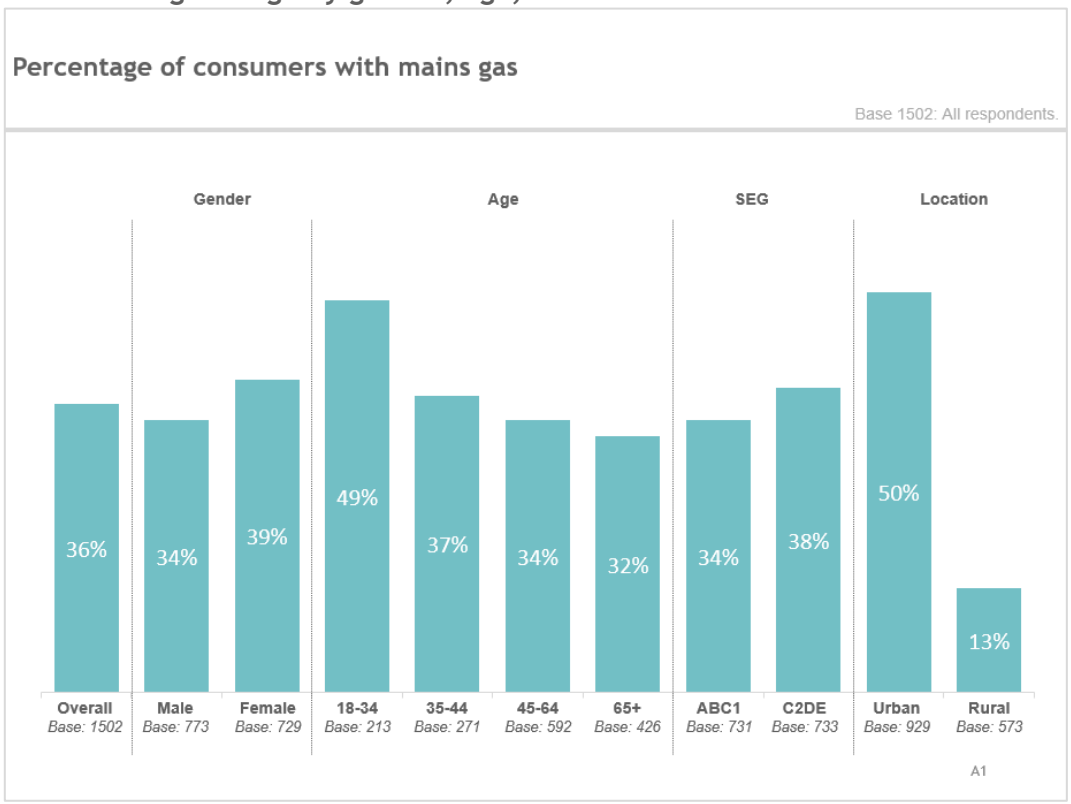


[1] 6 respondents said they have renewables or low carbon technologies – due to rounding this appears as 0%

Mains gas use

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

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



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

- Respondents aged 65 and over (62%) were more likely to have oil heating in their home when compared with those aged 18 to 34 (43%);
- Three in five (61%) of those in the ABC1 socioeconomic group (SEG) had oil heating installed, compared to 55% in the C2DE group;
- 64% of respondents who own their home use oil heating, compared to 48% who privately rent and 27% living in social housing; and
- Respondents living in rural areas (80%) were more likely to have oil heating in their home than those in urban areas (44%).

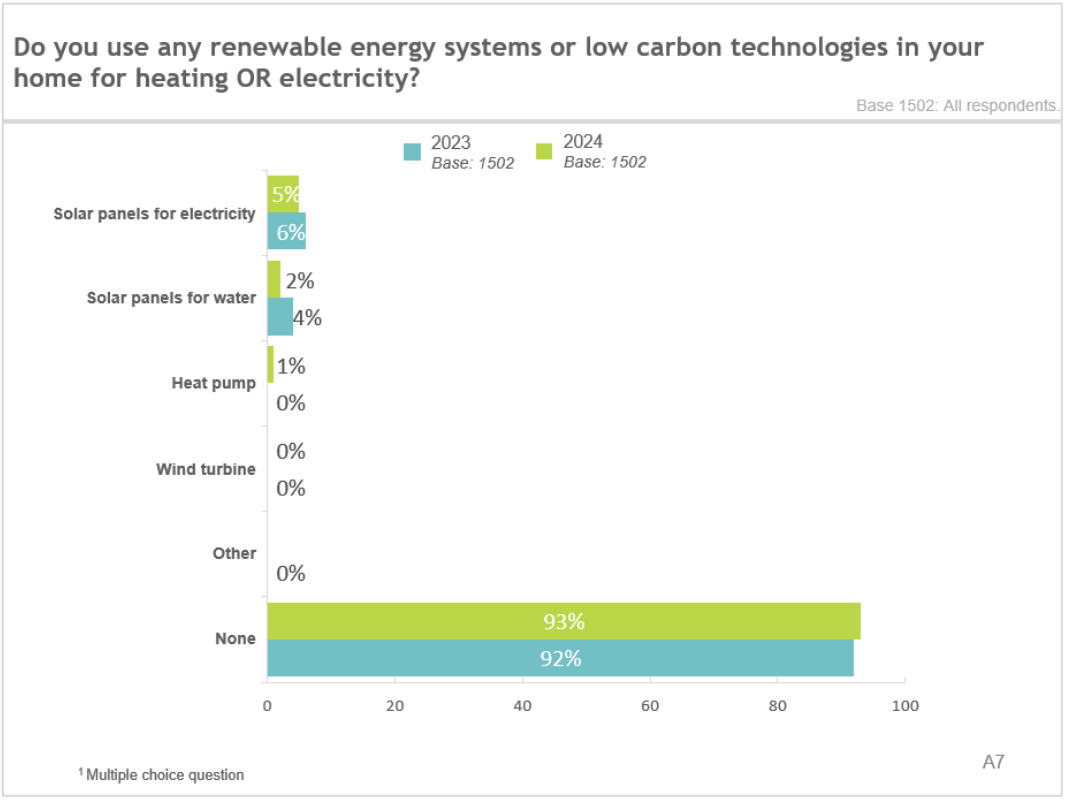
Table 4.1 Fuel source by demographics, tenure and location

		Electricity heating	Mains gas	Oil	Renewables / LCTs	Other	*Total*
Overall	All *Base: 1502*	4%	36%	58%	0%	2%	*100%*
Age	Under 35 *Base:213*	7%	49%	43%	-	1%	*100%*
	35-44 *Base:271*	3%	37%	59%	-	1%	*100%*
	45-64 *Base:592*	4%	34%	60%	1%	2%	*100%*
	65 plus *Base: 426*	4%	32%	62%	1%	2%	*100%*
SEG	ABC1 *Base: 731*	4%	34%	61%	0%	1%	*100%*
	C2DE *Base: 733*	5%	38%	55%	0%	2%	*100%*
Tenure	Owner occupied *Base: 1148*	3%	31%	64%	0%	2%	*100%*
	Private rented *Base: 174*	9%	40%	48%	-	3%	*100%*
	Social rented *Base: 161*	6%	67%	27%	1%	-	*100%*
Location	Urban *Base: 929*	4%	50%	44%	0%	1%	*100%*
	Rural *Base: 573*	4%	13%	80%	1%	3%	*100%*

Respondents were asked whether they use any renewable energy systems or low carbon technologies (LCTs) in their home for heating or electricity (see figure 4.3).

7% reported that they use renewable energy systems or LCTs similar to the 8% observed in the 2023 Tracker. Solar panels for electricity (5%) and water (2%) are the most commonly used types.

Figure 4.3 Renewable energy systems or LCTs



There were several subgroups that were significantly less likely to have any renewable energy systems or LCTs installed (see Table 4.2):

- 2% of younger respondents reported that they use LCTs, compared to 8% aged 65 and over;
- Respondents in the C2DE (5%) group were less likely to use LCTs than those in the ABC1 group (9%);
- 2% of those who privately rent their home have LCTs, compared to 8% who own their home;
- Those living in urban areas (5%) were less likely to use LCTs when compared to respondents living in rural areas (10%);
- Respondents living in the most deprived areas (4%) were less likely have any of these technologies installed when compared with those in the least deprived areas (9%);
- Those who have gas heating (4%) were less likely than respondents using other heating methods (8%) to have these technologies in their home;
- 4% of respondents with a prepayment meter for electricity stated they use LCTs, compared to 9% who have a credit meter.

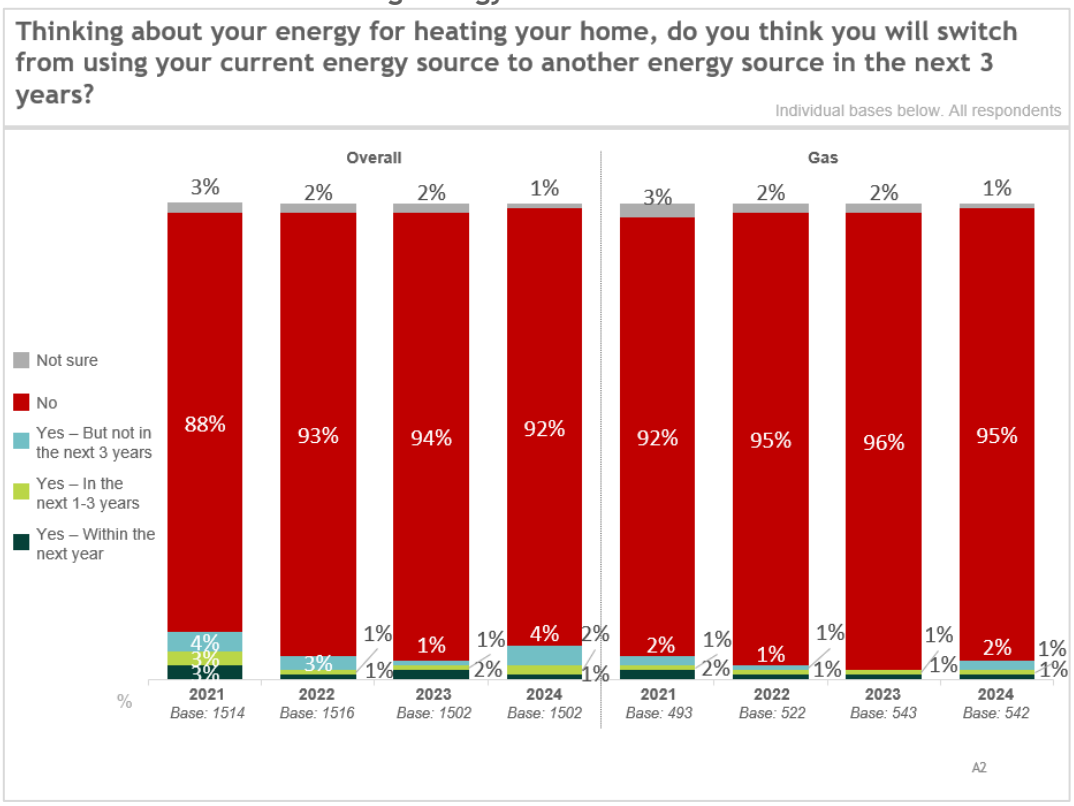
Table 4.2 Renewable energy systems or LCTs demographics, tenure, location, deprivation, heating, and electricity payment method

		Any renewable energy systems/ LCTs	None	*Total*
Overall	All *Base: 1502*	7%	93%	*100%*
Age	Under 35 *Base:213*	2%	98%	*100%*
	35-44 *Base:271*	7%	93%	*100%*
	45-64 *Base:592*	8%	92%	*100%*
	65 plus *Base: 426*	8%	92%	*100%*
SEG	ABC1 *Base: 731*	9%	91%	*100%*
	C2DE *Base: 733*	5%	95%	*100%*
Tenure	Owner occupied *Base: 1148*	8%	92%	*100%*
	Private rented *Base: 174*	2%	98%	*100%*
	Social rented *Base: 161*	5%	95%	*100%*
Location	Urban *Base: 929*	5%	95%	*100%*
	Rural *Base: 573*	10%	90%	*100%*
MDM Quintile	1 - Most deprived *Base: 271*	4%	96%	*100%*
	2 *Base: 301*	4%	96%	*100%*
	3 *Base: 315*	8%	92%	*100%*
	4 *Base: 314*	9%	91%	*100%*
	5 - Least deprived *Base: 301*	9%	91%	*100%*
Heating	Gas heating *Base: 542*	4%	96%	*100%*
	Other methods *Base: 960*	8%	92%	*100%*
Electricity payment method	Prepayment meter *Base: 593*	4%	96%	*100%*
	Credit meter *Base: 909*	9%	91%	*100%*

Intentions to switch energy type

When considering the type of energy used to heat their home, 3% (the same as in 2023) of electricity customers and 2% (the same as in 2023) of gas customers said that they were thinking about switching their current energy source within the next three years. A further 4% of electricity consumers expected to switch in over three years-time, with 2% of gas customers expecting this (see Figure 4.4).

Figure 4.4 Likelihood of switching energy source



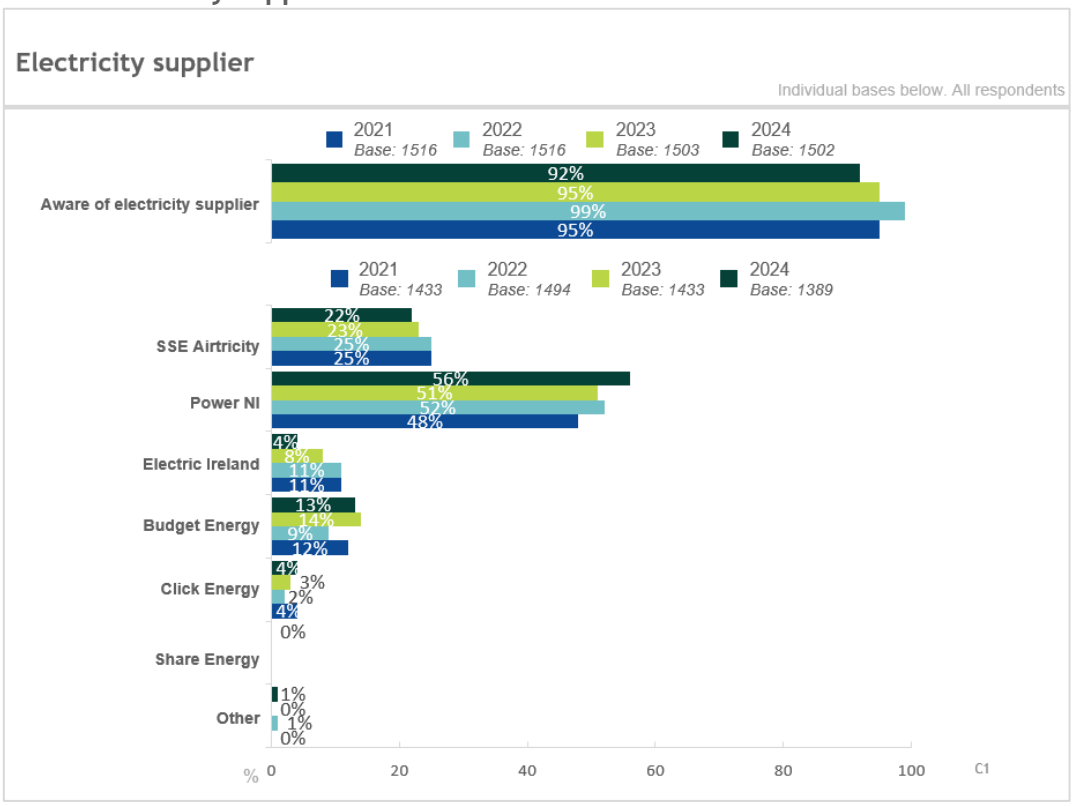
Of those who said they intend to switch their energy source, mains gas (51%, *n=50*) was the most preferred source, followed by renewables or low carbon technologies (33%, *n=33*).

Energy supplier

Electricity supplier

92% of respondents were aware of who their electricity supplier was, although this has fallen from 99% in 2022 and 95% in 2023. The most common electricity supplier was Power NI at 56%, followed by SSE Airtricity at 22% (see Figure 4.5).

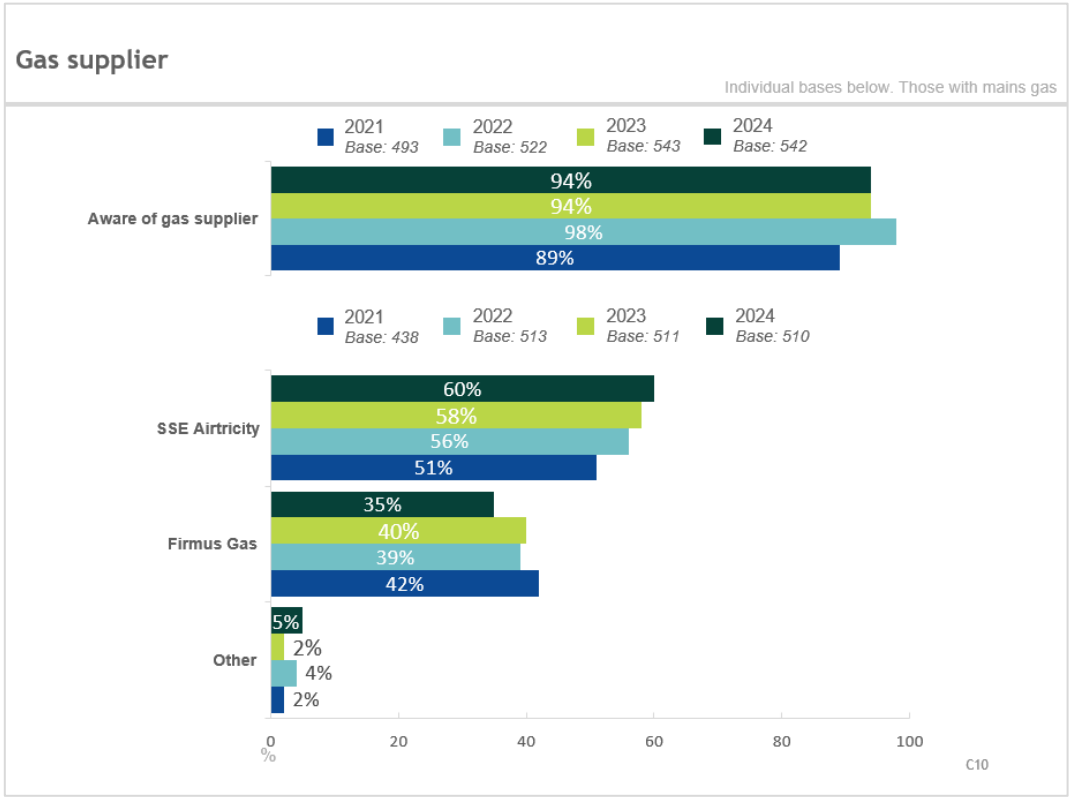
Figure 4.5 Electricity supplier



Gas supplier

The proportion of respondents who are aware of who their gas supplier remained the same as the 2023 Tracker at 94%, although this is lower than 98% observed in the 2022 Tracker. Of those who are aware, SSE Airtricity was the most common supplier at 60% followed by Firmus Gas at 35% (see Figure 4.6).

Figure 4.6 Gas supplier

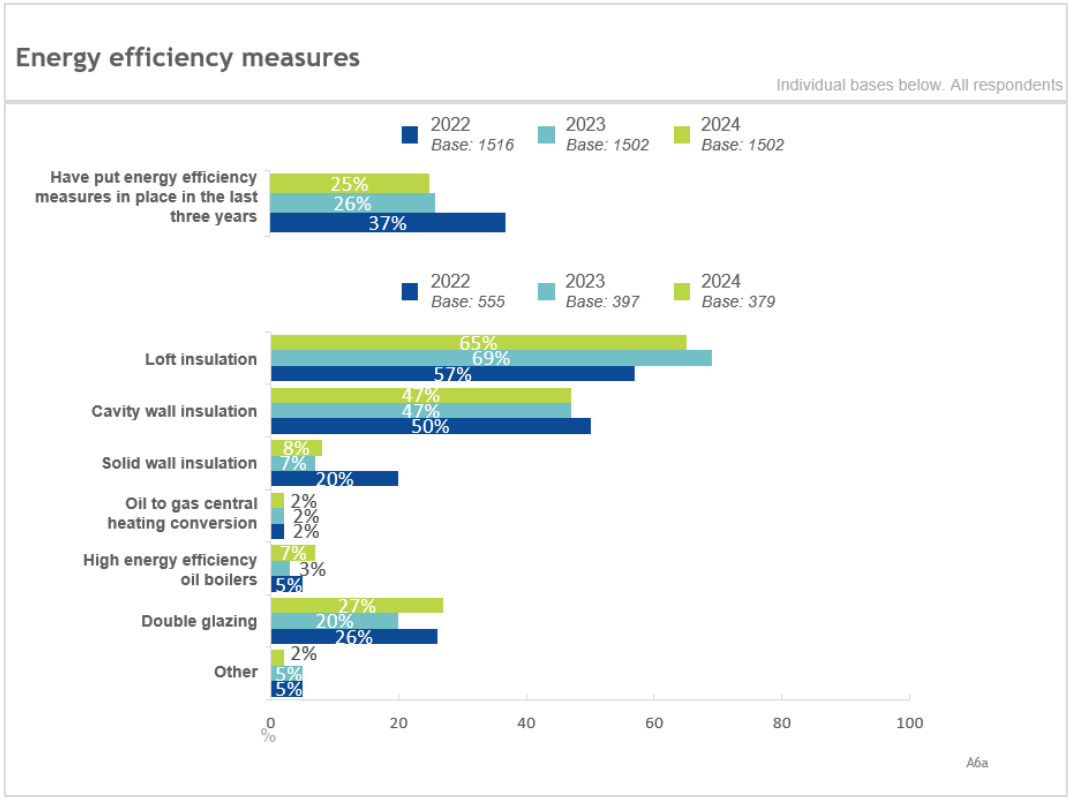


Energy efficiency measures

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

One quarter (25%) of domestic consumers have installed energy efficiency measures in their homes in the last three years, compared to 26% of respondents in 2023. Loft insulation (65%), cavity wall insulation (47%), and double glazing windows (27%) were the most common measures implemented.

Figure 4.7 Energy efficiency measures



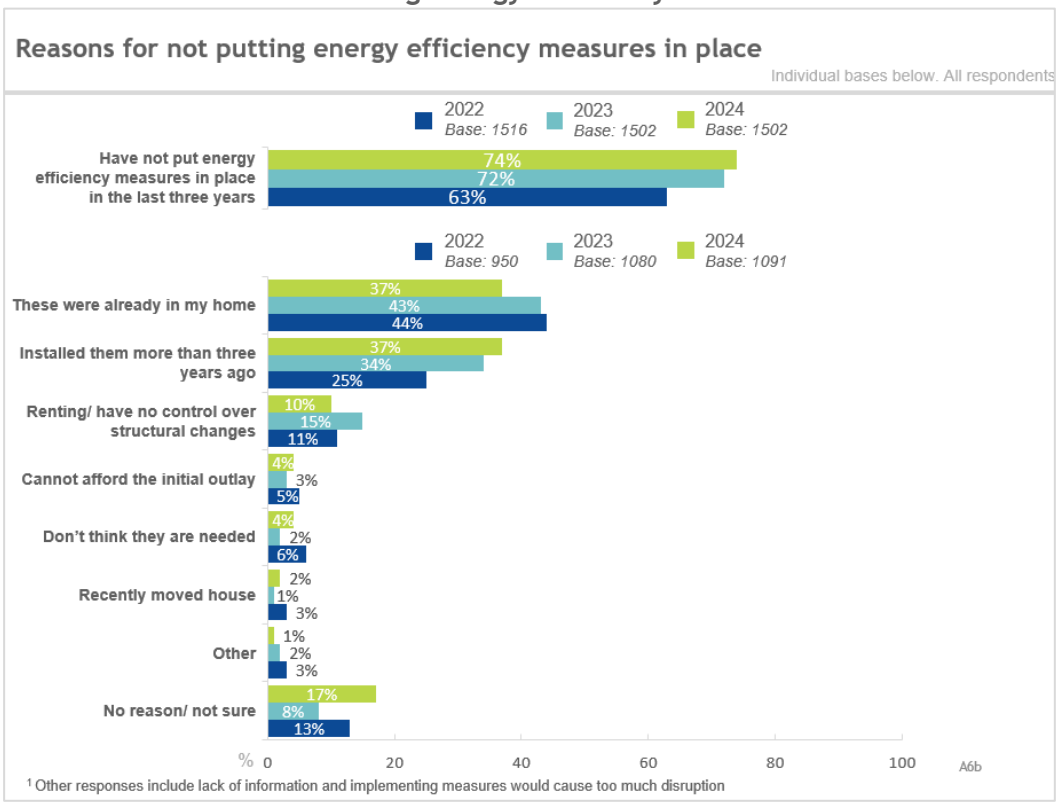
One third (33%) of respondents aged 65 and over reported that they had put energy efficiency measures in place in the last three years, compared to 15% aged 18 to 34. Those who own their home (27%) were more likely to have put energy efficiency measures in place than respondents who privately rent (16%), while those living in urban areas (29%) were more likely to have done this than those in rural areas (19%). Respondents who do not have children in their household (27%) were more likely to have put energy efficiency measures in place than those who have children in their household (21%). Almost one third (31%) of respondents who would not be considered vulnerable said they have put such measures in place, compared to 19% considered to be in the high or medium vulnerability group.

Table 4.3 Energy efficiency measures by age, tenure, location, children, and vulnerability

		Yes	No	Not sure	*Total*
Overall	All *Base: 1502*	25%	74%	1%	*100%*
Age	Under 35 *Base:213*	15%	83%	2%	*100%*
	35-44 *Base:271*	18%	82%	1%	*100%*
	45-64 *Base:592*	27%	72%	1%	*100%*
	65 plus *Base: 426*	33%	67%	0%	*100%*
Tenure	Owner occupied *Base: 1148*	27%	72%	0%	*100%*
	Private rented *Base: 174*	16%	80%	4%	*100%*
	Social rented *Base: 161*	20%	80%	1%	*100%*
Location	Urban *Base: 929*	29%	70%	1%	*100%*
	Rural *Base: 573*	19%	80%	0%	*100%*
Children	Yes *Base: 449*	21%	79%	-	*100%*
	No *Base: 1027*	27%	72%	1%	*100%*
Vulnerability	High/medium vulnerability *Base: 623*	19%	80%	0%	*100%*
	Low vulnerability *Base: 57*	12%	86%	2%	*100%*
	Not vulnerable *Base: 822*	31%	68%	1%	*100%*

Those who had not put any measures in place were asked for their reasons for not doing this. 37% said that there were already measures in place when they moved into their home, 37% had measures installed more than three years ago. 10% mentioned they had no control over structural changes to their home, and 4% cannot afford the initial outlay (see Figure 4.8).

Figure 4.8 Reasons for not installing energy efficiency measures



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

5. Payment

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

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

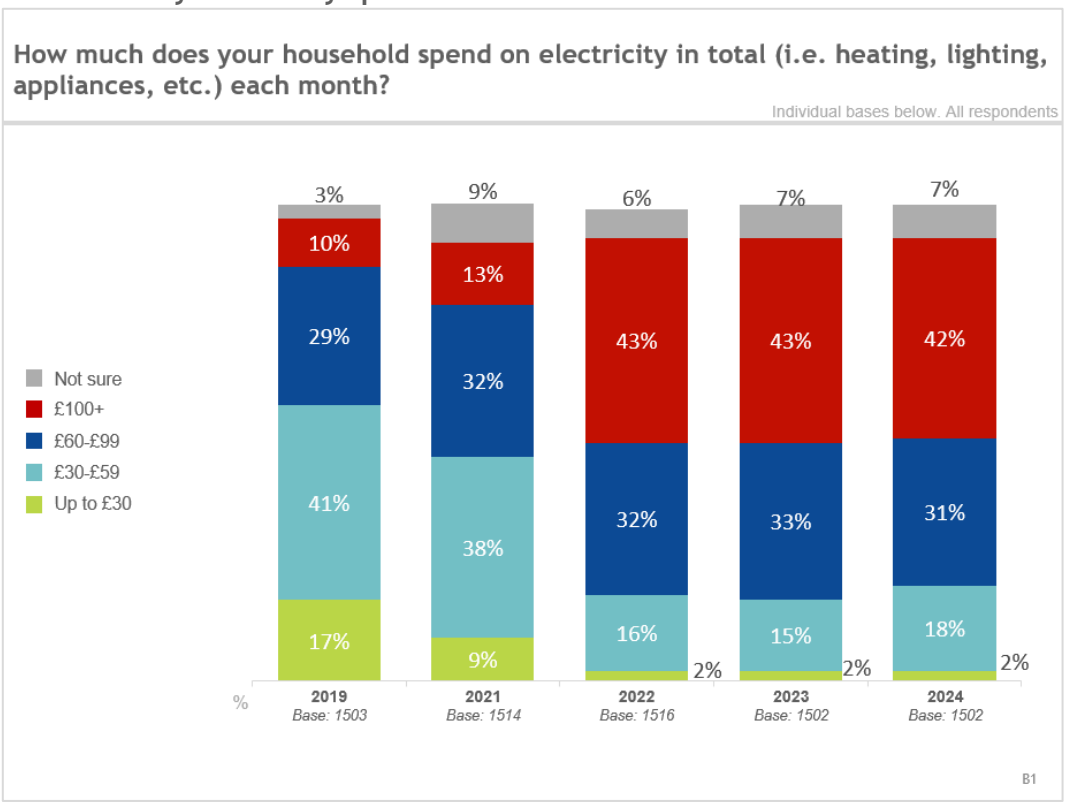
Key findings

- 42% have electricity bills of at least £100 per month, similar to 43% in both 2023 and 2022, but higher than the 13% observed in 2021.
- The proportion of respondents paying £150 or more per month for their electricity has decreased slightly from 16% in 2023 to 13%.
- 41% of gas respondents have a monthly spend of at least £100, compared to 42% who reported this in 2023 and 48% in 2022, but still considerably higher than the 9% who reported spending £100 or more on gas in 2021.
- 39% of respondents use a prepayment meter for electricity, while 54% of respondents with mains gas pay for their heating via a prepayment meter.
- Convenience was the most often cited reason for having a prepayment meter (79% of those with an electricity prepayment meter and 75% of those with a gas prepayment meter).
- The proportion of consumers who reported that one of the reasons they use a prepayment meter is to monitor their energy usage has fallen from 2023, for both electricity and gas:
  - 9% of electricity consumers (compared to 33% in 2023); and
  - 8% of gas consumers (compared to 34% in 2023).
- The majority of electricity (96%) and gas (95%) consumers who use a prepayment meter indicated that they are content to remain using this method rather than change to alternative payment methods such as direct debit.
- 79% of electricity and 85% of gas customers stated that they were on a standard variable tariff, the same proportions as the 2023 Tracker.
- Support has increased for paying extra on bills for future investment since 2023:
  - 27% of respondents stated that they would be willing to pay extra on their bill for future investment (compared to 17% in 2023);
  - 19% would pay extra to provide help to vulnerable customers (12% in 2023);
  - 19% would pay extra for projects to protect the environment (9% in 2023); and
  - 10% would be willing to pay extra to improve the reliability of the network (4% in 2023).
  - Rural respondents (13%) were more likely than urban respondents (8%) to say they would be willing to pay extra to improve the reliability of the network.
- 27% indicated they would be willing to pay extra on their bill to allow particular consumer groups to avail of a discounted tariff.

Spend on electricity and heating

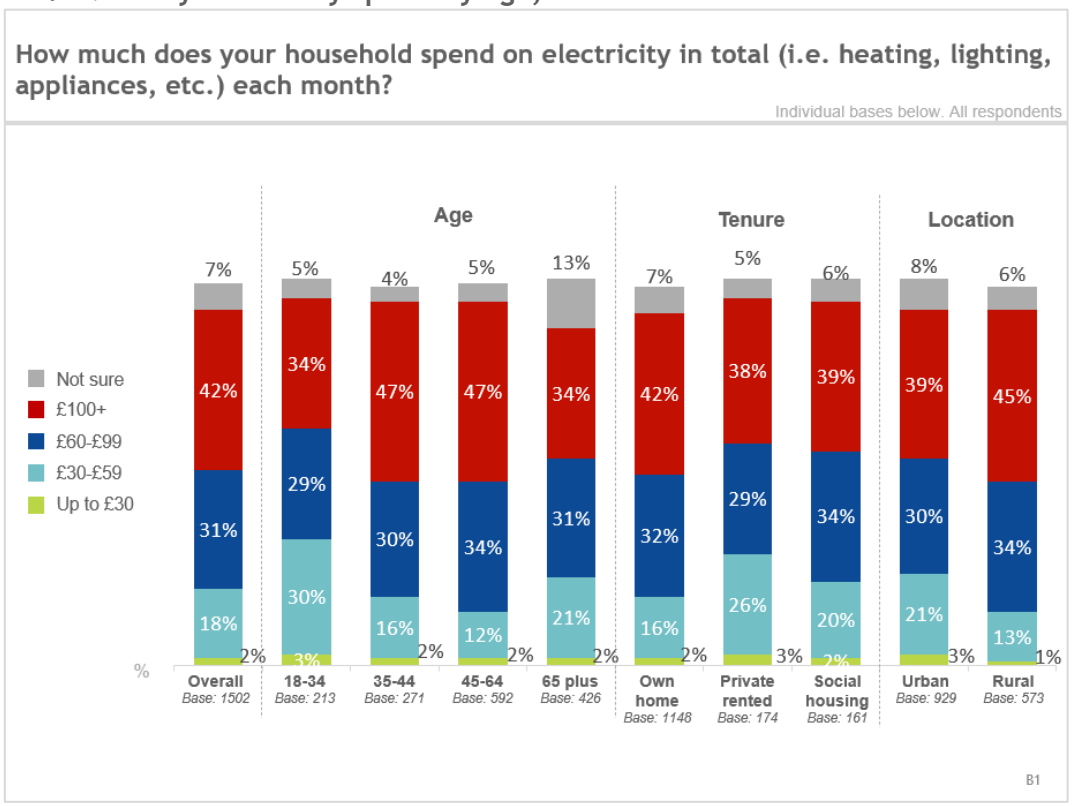
Respondents were asked what their monthly household spend on electricity was (see figure 5.1). 2% reported that they spend up to £30, with 18% saying it was between £30 and £59. Respondents were most likely to spend between £60 and £99 (31%) and £100-£149 (28%). These findings are consistent with those observed in the 2023 Tracker, although those paying £150 or more per month has decreased from 16% to 13%.

Figure 5.1 Monthly electricity spend



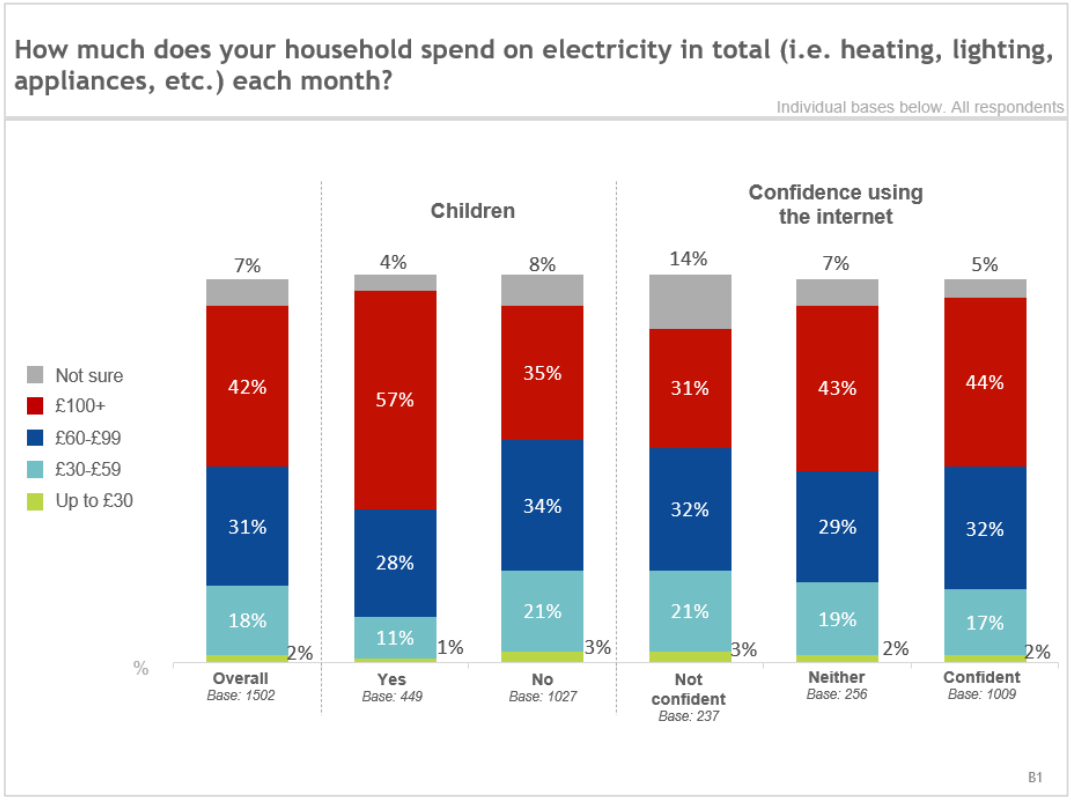
While respondents aged 18 to 34 (30%) were more likely than those aged 65 and over (21%) to report spending £30 to £59 per month on electricity, the same proportion of each group said they spend £100 or more (34%). One quarter (26%) of those who privately rent stated that they spend £30 to £59 per month on electricity compared to 16% who own their home, while those living in rural areas were more likely to say they spend £100 or more than those in urban areas (39%) (see Figure 5.2).

Figure 5.2 Monthly electricity spend by age, tenure and location



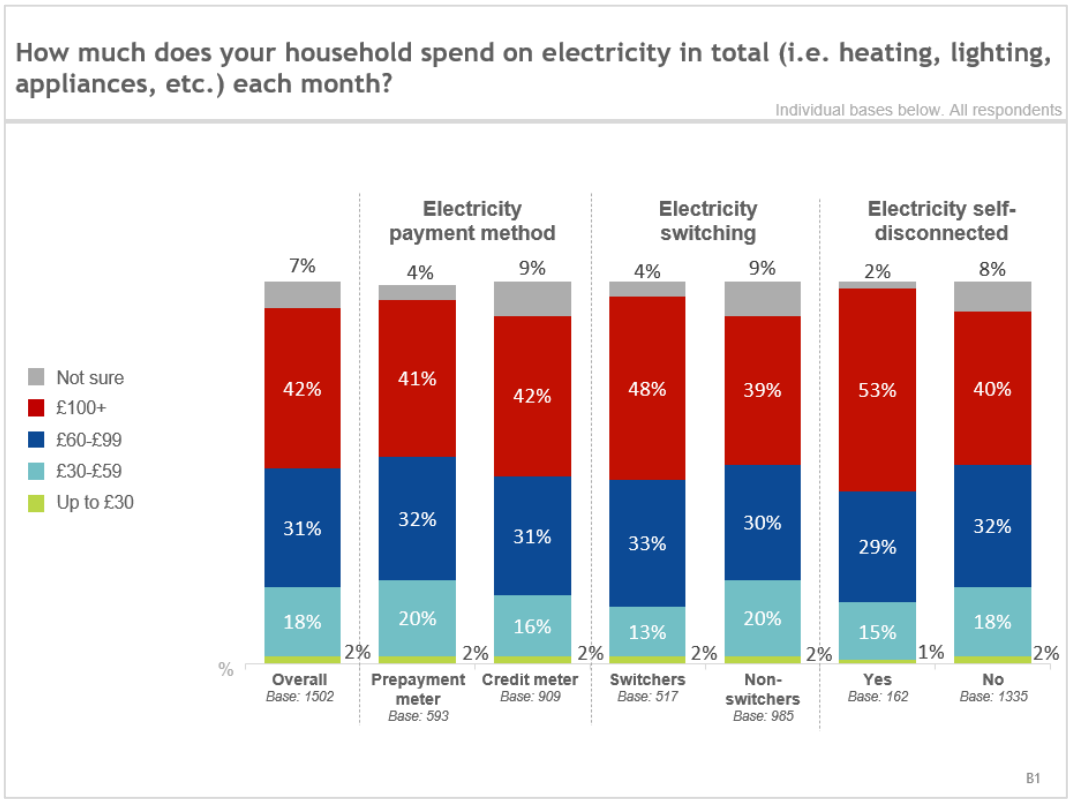
Respondents who have children in their household (57%) were more likely than those without children (35%) to say they spend £100 or more per month on electricity. 44% of respondents who consider themselves to be confident internet users reported that they spend £100 or more, compared to 31% who do not consider themselves to be confident internet users (see Figure 5.3).

Figure 5.3 Monthly electricity spend by children and confidence using the internet



9% of those who have a credit meter[10] for electricity (9%) said they did not know how much they spend per month on electricity compared to 4% with a prepayment meter. Respondents who had switched electricity supplier in the last three years (48%) were more likely to say they spend £100 or more per month when compared with non-switchers (39%). 53% of those who have self-disconnected from their electricity supply spend at least £100 per month on electricity, compared to 40% who have not self-disconnected (see Figure 5.4).

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



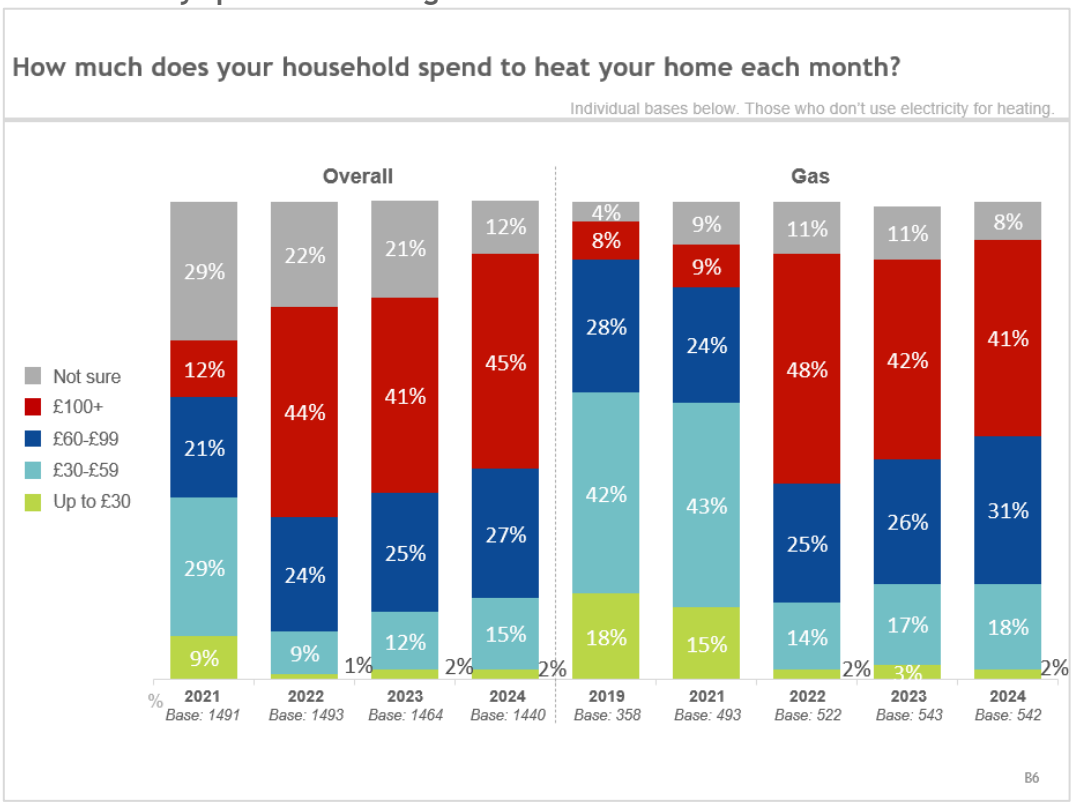
[10] Credit customers or those who have a credit meter refers to respondents who do not use a prepayment meter to pay for their electricity or gas.

Monthly spend on heating

Respondents were asked how much they spend each month on heating their home (see Figure 5.5). Those with gas (92%) were more likely than those who use other means (86%) to know how much their monthly spend was on heating. Overall awareness of monthly heating spend has increased however, with 12% reporting they were unsure of their heating spend compared to 21% in the 2023 Tracker.

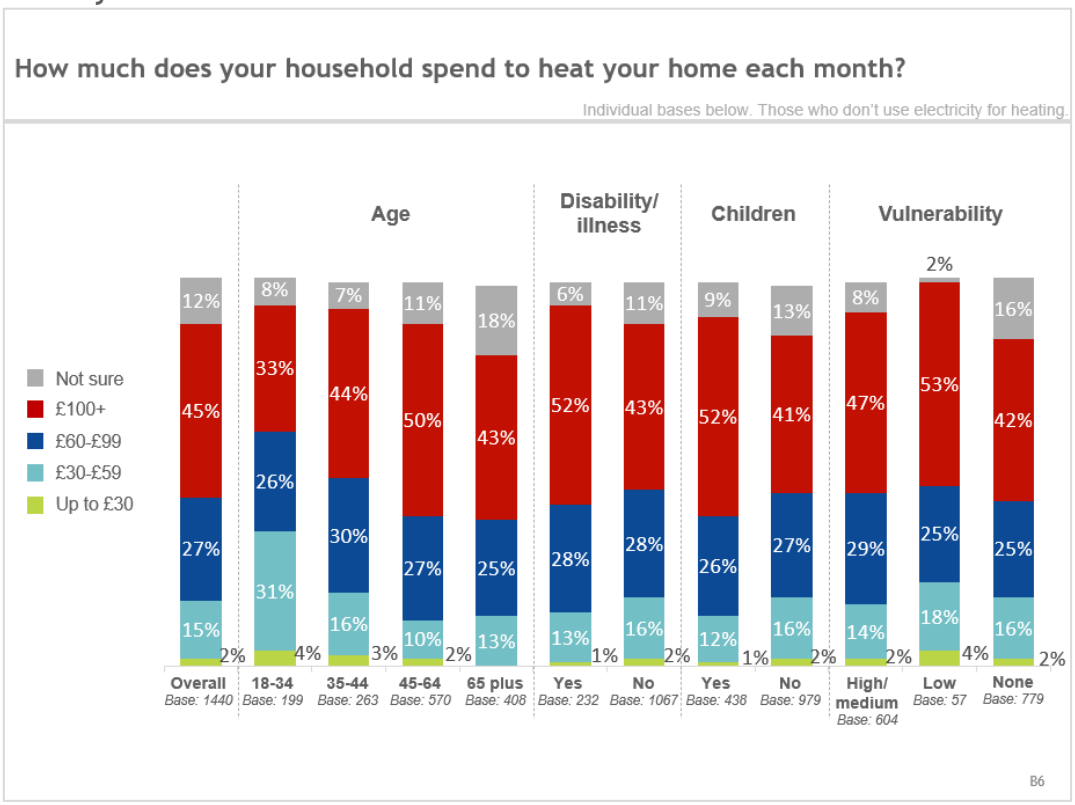
The most common spend was between £60 to £99 for gas users (31%) and £100 to £149 for those who used other means (33%). Overall, 45% reported spending £100 or more per month on heating, up from 41% in the 2023 Tracker, with 41% of gas users reporting this in 2024.

Figure 5.5 Monthly spend on heating



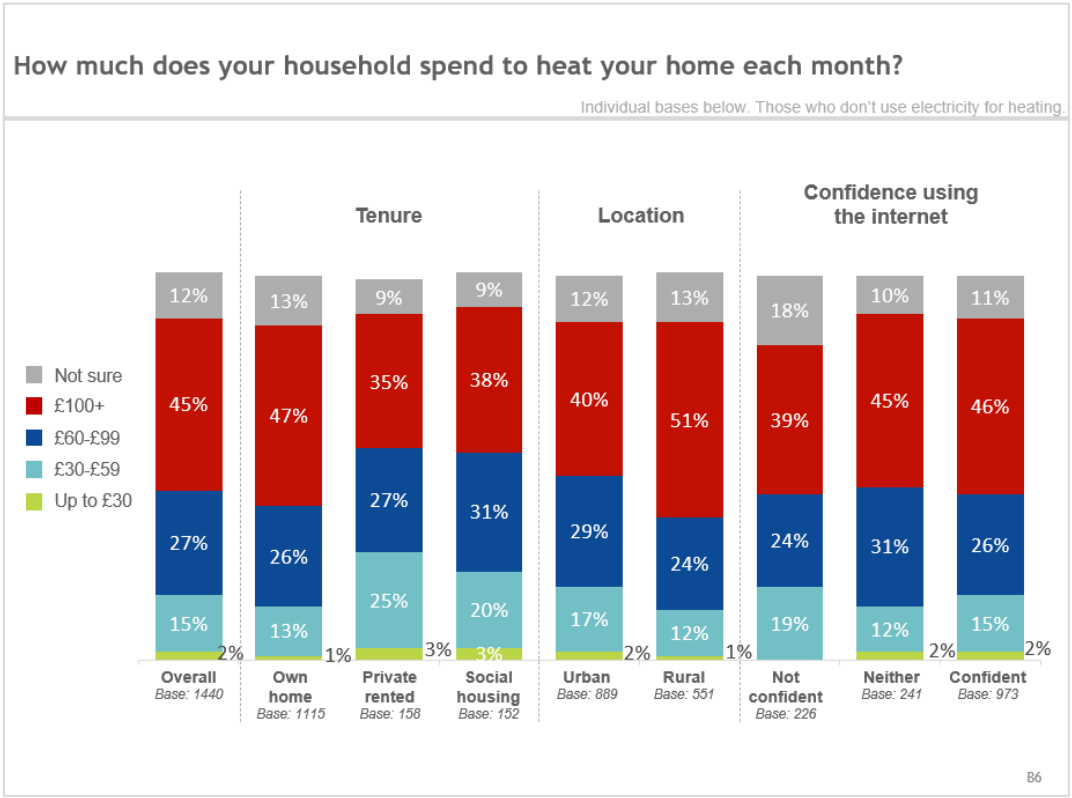
Respondents aged 65 and over (18%) were less likely to know how much they spend on heating per month than all other age groups. Older respondents (43%) were also more likely to report spending £100 or more per month than younger respondents (33%). Those who have someone with a disability or illness in their household (52%) and those who have children in their household (52%) were also more likely to say they spend at least £100 per month on heating than those who do not have a disability or illness in their household (43%) and who do not have children in their household (41%). 16% of respondents who would not be considered vulnerable stated that they did not know how much they spend on heating per month, compared to 8% in the high or medium vulnerability group (see Figure 5.6).

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



Respondents who own their home (47%) were more likely to report spending £100 or more per month on heating than private renters (35%). Those who live in rural areas (51%) were more likely to spend at least £100 per month when compared with those in urban areas (40%). 18% of respondents who were not confident internet users were not sure about their monthly heating spend, compared to 11% of those who consider themselves confident internet users (see Figure 5.7).

Figure 5.7 Monthly spend on heating by tenure, location and confidence using the internet



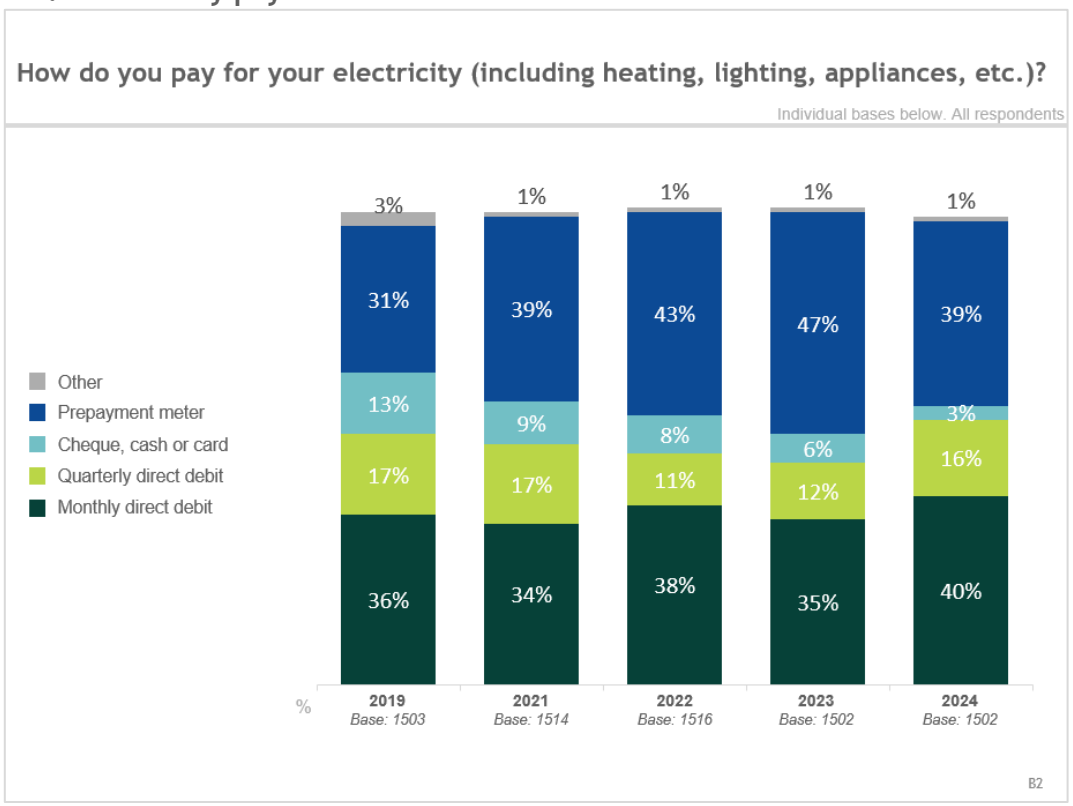
Energy payment methods and tariff types

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

Electricity

39% of respondents said they use a prepayment meter to pay for electricity. Of those on a credit meter, two in five (40%) said they are on a monthly direct debit and 16% on a quarterly direct debit. 3% reported that they pay for electricity using cheque, cash or card on receipt of their bill (see Figure 5.8).

Figure 5.8 Electricity payment method



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

- Half (50%) of those aged 18 to 34 said that they have a prepayment meter for electricity, compared to one quarter (26%) of those aged 65 and over. Respondents in the 65 and over group (6%) were also more likely to report paying by cheque, cash or card than those aged 18 to 34 (1%);
- Respondents in the C2DE socioeconomic group (53%) were more likely to report having a prepayment meter than those in the ABC1 group (27%). 51% of those in the ABC1 group stated that they are on monthly direct debit for their electricity, compared to 29% in the C2DE group;
- Those living in social housing (75%) and who privately rent (61%) were much more likely to say they have a prepayment meter for electricity than those who own their home (32%);
- Two in five (42%) urban respondents reported having a prepayment meter for electricity, compared to over one third (35%) living in rural areas;
- Respondents living in the most deprived areas (62%) were most likely to have a prepayment meter for electricity than those in the least deprived areas (24%);
- Respondents who have someone with a disability or illness in their household (55%) and those who have children (49%) were more likely to have an electricity prepayment meter than those who do not have someone with a disability or illness in their household (37%) and who do not have children in their household (36%);
- Those considered to be in the high and medium vulnerability group (45%) were more likely to say they have a prepayment meter for electricity than those who are not considered vulnerable (33%);
- 9% of respondents who do not consider themselves to be confident internet users pay for their electricity using cheque, cash or card, compared to 2% who consider themselves confident internet users;
- Electricity switchers (46%) were more likely to state that they have a prepayment meter for electricity than those who would not be considered switchers (36%); and
- Respondents who have self-disconnected from their electricity (88%) were more likely to report having a prepayment meter in their home than those who have not done so (34%).

Table 5.1 Electricity payment method by demographics, tenure, location, deprivation, disability or illness, children, vulnerability, confidence using the internet, electricity switchers, and electricity self-disconnection

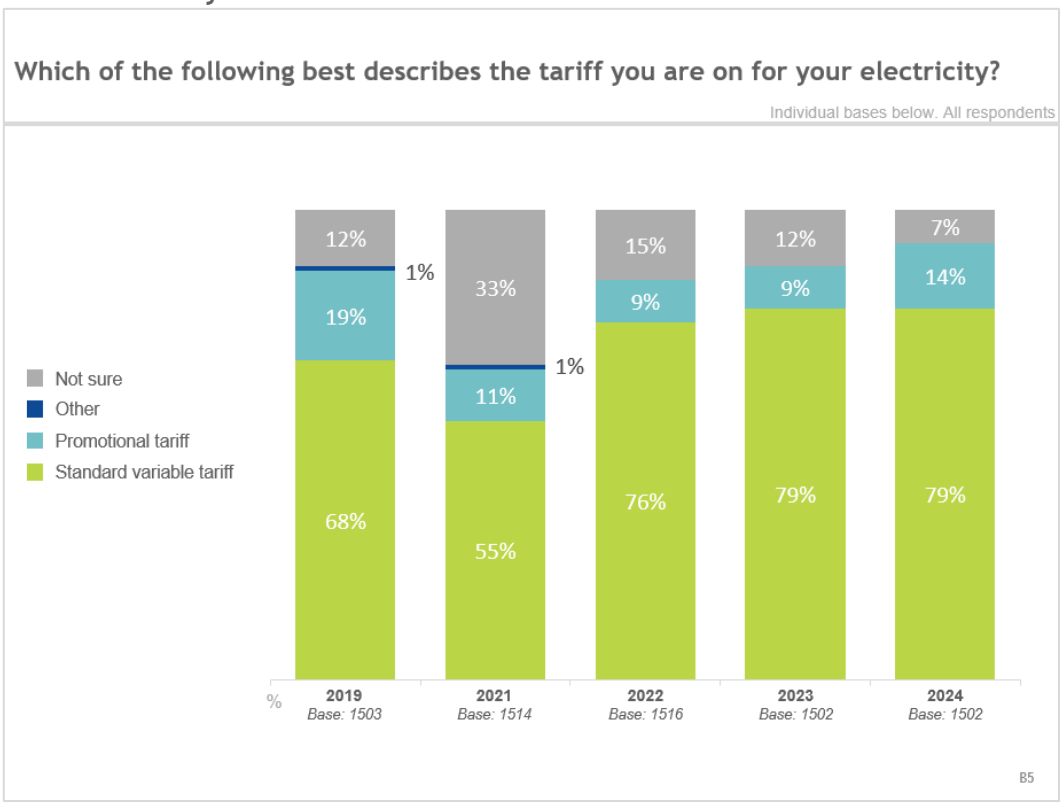
		Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment meter	Other	*Total*
Overall	All *Base: 1502*	40%	16%	3%	39%	1%	*100%*
Age	Under 35 *Base:213*	36%	12%	1%	50%	0%	*100%*
	35-44 *Base:271*	33%	19%	0%	48%	-	*100%*
	45-64 *Base:592*	40%	15%	3%	41%	1%	*100%*
	65 plus *Base: 426*	49%	18%	6%	26%	1%	*100%*
SEG	ABC1 *Base: 731*	51%	18%	3%	27%	1%	*100%*
	C2DE *Base: 733*	29%	13%	4%	53%	1%	*100%*
Tenure	Owner occupied *Base: 1148*	46%	18%	4%	32%	1%	*100%*
	Private rented *Base: 174*	29%	8%	1%	61%	1%	*100%*
	Social rented *Base: 161*	14%	7%	4%	75%	1%	*100%*
Location	Urban *Base: 929*	41%	13%	3%	42%	1%	*100%*
	Rural *Base: 573*	39%	21%	4%	35%	0%	*100%*
MDM Quintile	1 - Most deprived *Base: 271*	21%	12%	4%	62%	1%	*100%*
	2 *Base: 301*	40%	12%	2%	46%	0%	*100%*
	3 *Base: 315*	37%	20%	5%	37%	1%	*100%*
	4 *Base: 314*	45%	18%	4%	32%	1%	*100%*
	5 - Least deprived *Base: 301*	57%	16%	3%	24%	1%	*100%*
Disability/ illness	Yes *Base: 242*	29%	11%	4%	55%	2%	*100%*
	No *Base: 1107*	42%	17%	3%	37%	1%	*100%*
Children	Yes *Base: 449*	35%	14%	1%	49%	-	*100%*
	No *Base: 1027*	42%	16%	4%	36%	1%	*100%*
Vulnerability	High/medium vulnerability *Base: 623*	35%	16%	3%	45%	1%	*100%*
	Low vulnerability *Base: 57*	32%	5%	-	63%	-	*100%*
	Not vulnerable *Base: 822*	45%	17%	4%	33%	1%	*100%*

Table 5.1 (cont.) Electricity payment method by demographics, tenure, location, deprivation, disability or illness, children, vulnerability, confidence using the internet, electricity switchers, and electricity self-disconnection

		Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment meter	Other	*Total*
Overall	All *Base: 1502*	40%	16%	3%	39%	1%	*100%*
Confidence using the internet	Not confident *Base: 237*	30%	19%	9%	41%	1%	*100%*
	Neither *Base: 256*	39%	12%	5%	42%	2%	*100%*
	Confident *Base: 1009*	43%	16%	2%	38%	1%	*100%*
Electricity switching	Switchers *Base: 517*	44%	8%	1%	46%	1%	*100%*
	Non-switchers *Base: 985*	39%	20%	5%	36%	1%	*100%*
Electricity self-disconnection	Yes *Base: 162*	9%	2%	1%	88%	1%	*100%*
	No *Base: 1335*	44%	18%	4%	34%	1%	*100%*

Almost four in five (79%) reported that they were on their supplier's standard variable tariff, the same proportion as in 2023. This is followed by 14% who were on a promotional tariff, an increase from 9% in 2023. 7% were unsure what tariff they were on for electricity, falling from 12% in 2023. Those who have switched their electricity supplier in the last three years (29%) were more likely to be on a promotional tariff than non-switchers (6%) (see Figure 5.9 and Table 5.2).

Figure 5.9 Electricity tariff



The following significant differences were observed (see Table 5.2):

- Respondents aged 65 and over (83%) were more likely to be on a standard variable tariff with their electricity supplier than those aged 18 to 34 (75%);
- Those in the ABC1 group (16%) were more likely to be on a promotional tariff when compared with those in the C2DE group (12%);
- 16% of respondents living in social housing and 15% who own their home were on a promotional tariff, compared to 7% of private renters;
- Urban respondents (16%) were more likely to be on a promotional tariff than those living in rural areas (10%);
- Respondents who have someone in their household with a disability or illness (19%) were more likely than those without (13%) to be on a promotional tariff, as were those in the high and medium vulnerability group (17%) when compared with those who are not considered vulnerable (12%);
- 15% of those who said they were confident internet users reported having a promotional tariff, compared with 10% who do not consider themselves to be confident internet users;
- Respondents who had self-disconnected from their electricity supply (22%) were more likely than those who had not self-disconnected (13%) to be on a promotional tariff for electricity.

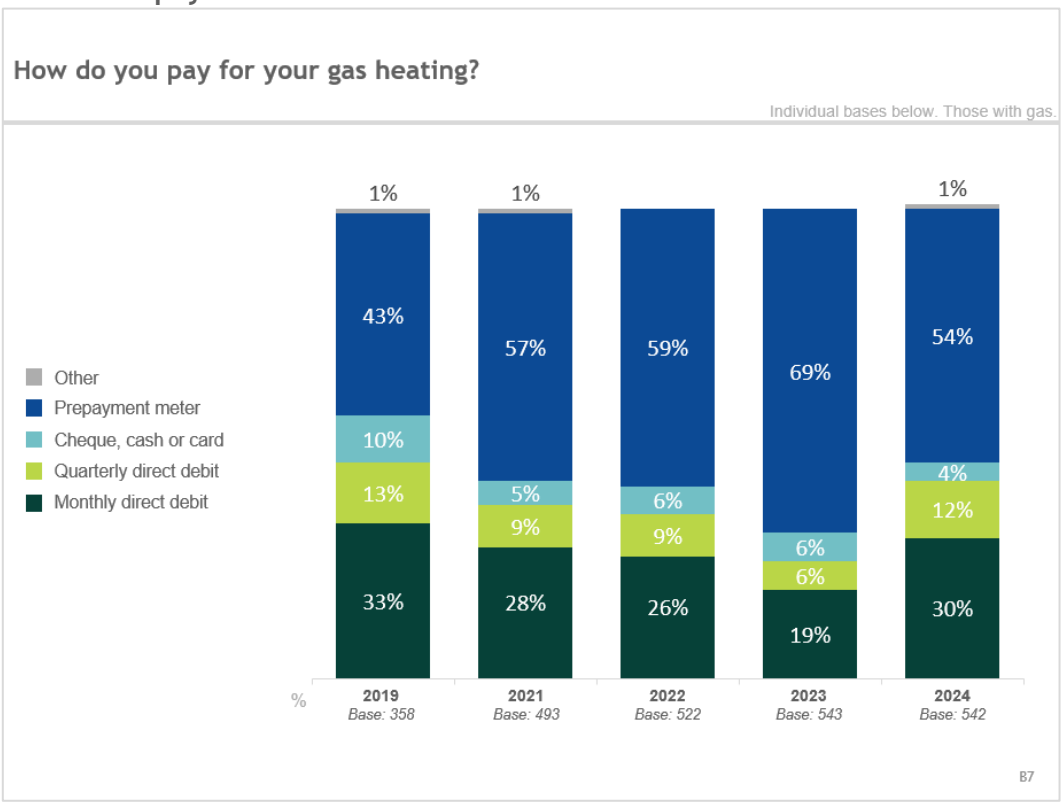
Table 5.2 Electricity tariff by demographics, tenure, location, disability or illness status, vulnerability, confidence using the internet, electricity switching, and electricity self-disconnection

		Standard variable tariff	Promotional tariff	Don't know	*Total*
Overall	All *Base: 1502*	79%	14%	7%	*100%*
Age	Under 35 *Base:213*	75%	15%	11%	*100%*
	35-44 *Base:271*	76%	17%	6%	*100%*
	45-64 *Base:592*	79%	16%	5%	*100%*
	65 plus *Base: 426*	83%	9%	8%	*100%*
SEG	ABC1 *Base: 731*	78%	16%	5%	*100%*
	C2DE *Base: 733*	79%	12%	8%	*100%*
Tenure	Owner occupied *Base: 1148*	79%	15%	6%	*100%*
	Private rented *Base: 174*	80%	7%	13%	*100%*
	Social rented *Base: 161*	80%	16%	5%	*100%*
Location	Urban *Base: 929*	77%	16%	6%	*100%*
	Rural *Base: 573*	81%	10%	8%	*100%*
Disability/ illness	Yes *Base: 242*	74%	19%	8%	*100%*
	No *Base: 1107*	79%	13%	7%	*100%*
Vulnerability	High/medium vulnerability *Base: 623*	76%	17%	7%	*100%*
	Low vulnerability *Base: 57*	79%	19%	2%	*100%*
	Not vulnerable *Base: 822*	81%	12%	7%	*100%*
Confidence using the internet	Not confident *Base: 237*	82%	10%	8%	*100%*
	Neither *Base: 256*	81%	13%	6%	*100%*
	Confident *Base: 1009*	78%	15%	7%	*100%*
Electricity switching	Switchers *Base: 517*	66%	29%	5%	*100%*
	Non-switchers *Base: 985*	86%	6%	8%	*100%*
Electricity self-disconnection	Yes *Base: 162*	73%	22%	5%	*100%*
	No *Base: 1335*	80%	13%	7%	*100%*

Gas

54% of respondents say they use a prepayment meter to pay for their gas. This was followed by 30% who pay by monthly direct debit, and 12% who have a quarterly direct debit. 4% pay for gas with cheque, cash or card on receipt of the bill (see figure 5.10).

Figure 5.10 Gas payment method



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

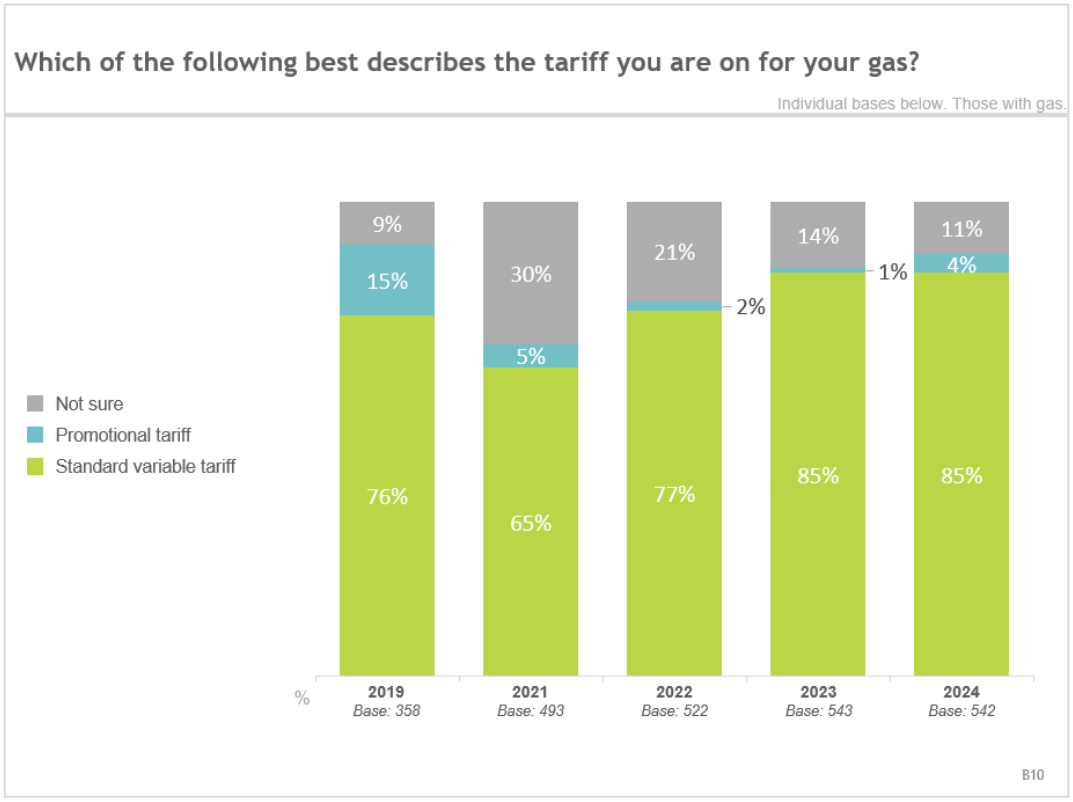
- 68% of those aged 18 to 34 have a prepayment meter for gas, compared to two in five (39%) of those aged 65 and over;
- Respondents in the C2DE group (69%) were more likely to have a prepayment meter for gas than those in the ABC1 group (39%);
- Respondents living in the most deprived areas (77%) were more likely than those living in all other areas to have a prepayment meter for gas;
- 73% of gas customers who have or live with someone who has a disability or illness have a prepayment meter, compared to over half (52%) of those who do not have someone with a disability or illness in their household;
- Respondents who have children in the household (64%) were more likely to have a prepayment meter for gas than those without children (51%);
- Three in five (61%) respondents in the high or medium vulnerability group had a prepayment meter for gas, compared to half (49%) who are not considered vulnerable;
- Those who have self-disconnected from their gas supply (87%) were more likely to have a prepayment meter than those who have not self-disconnected (48%).

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

		Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment meter	Other	*Total*
Overall	All *Base: 542*	30%	12%	4%	54%	1%	*100%*
Age	Under 35 *Base:105*	17%	12%	3%	68%	-	*100%*
	35-44 *Base:99*	19%	16%	1%	64%	-	*100%*
	45-64 *Base:202*	32%	11%	3%	53%	0%	*100%*
	65 plus *Base: 136*	43%	10%	6%	39%	1%	*100%*
SEG	ABC1 *Base: 248*	40%	17%	3%	39%	1%	*100%*
	C2DE *Base: 276*	19%	8%	4%	69%	0%	*100%*
MDM Quintile	1 - Most deprived *Base: 145*	11%	8%	4%	77%	1%	*100%*
	2 *Base: 81*	26%	10%	5%	59%	-	*100%*
	3 *Base: 68*	25%	16%	3%	54%	1%	*100%*
	4 *Base: 86*	38%	12%	-	50%	-	*100%*
	5 - Least deprived *Base: 162*	46%	15%	4%	34%	1%	*100%*
Disability/ illness	Yes *Base: 91*	18%	5%	3%	73%	1%	*100%*
	No *Base: 389*	31%	13%	4%	52%	0%	*100%*
Children	Yes *Base: 166*	22%	13%	2%	64%	-	*100%*
	No *Base: 362*	32%	11%	4%	51%	1%	*100%*
Vulnerability	High/medium vulnerability *Base: 215*	22%	13%	4%	61%	0%	*100%*
	Low vulnerability *Base: 28*	39%	7%	-	54%	-	*100%*
	Not vulnerable *Base: 299*	34%	12%	4%	49%	1%	*100%*
Gas self-disconnection	Yes *Base: 89*	4%	7%	2%	87%	-	*100%*
	No *Base: 450*	35%	13%	4%	48%	1%	*100%*

85% of households with gas heating reported that they were on a standard variable tariff with their supplier (no change from 2023), with 4% being on a promotional tariff. 11% were unsure what tariff they were on, down slightly from 14% in the 2023 Tracker (see Figure 5.11).

Figure 5.11 Gas tariff



Prepayment meters

Electricity

Of those respondents with a prepayment meter for electricity, four in five (79%) reported that the reason they have one is because it is convenient for them. The number of respondents who said they have a prepayment meter to monitor their energy usage fell from 33% in 2023 to 9% in 2024. One third (33%) mentioned that the property came with a prepayment meter already installed (see Figure 5.11). Those aged 65 and over (88%) were more likely than those in the younger age group (68%) to cite convenience as the reason for having a prepayment meter for electricity. Those aged 18 to 34 (55%) were more likely to mention that the property already came with a prepayment meter than those in the older age group (16%) (see Table 5.4).

Figure 5.12 Reasons for having a prepayment meter for electricity

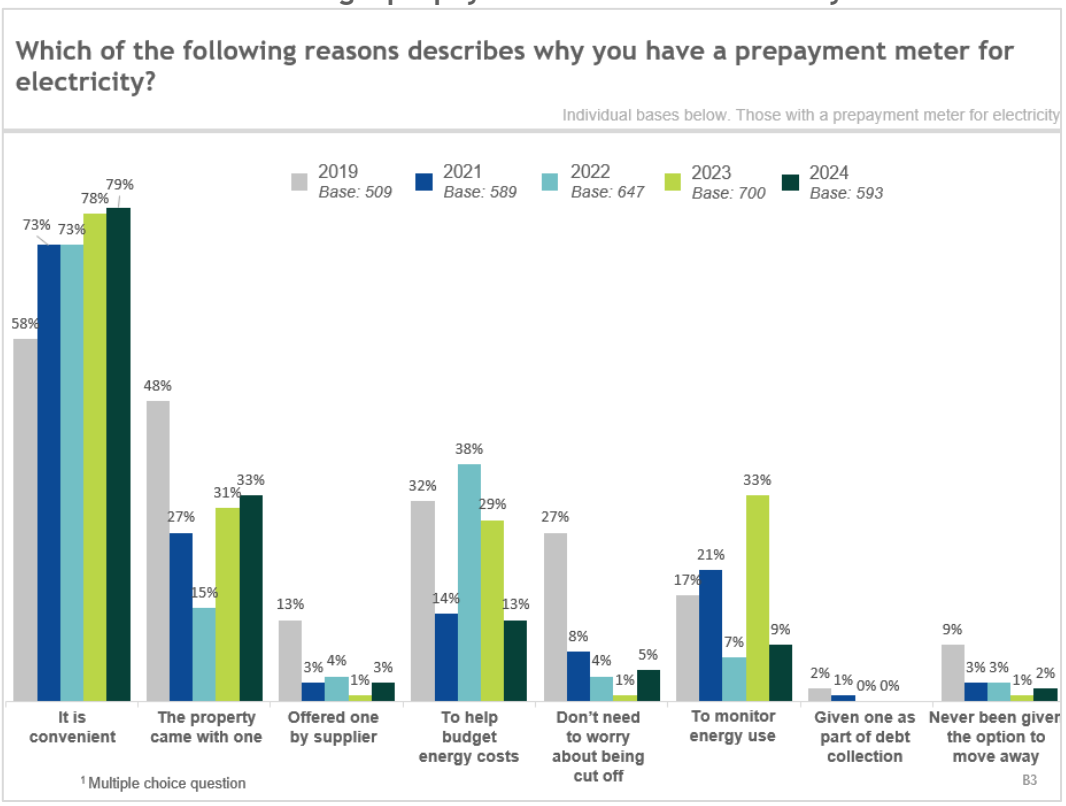
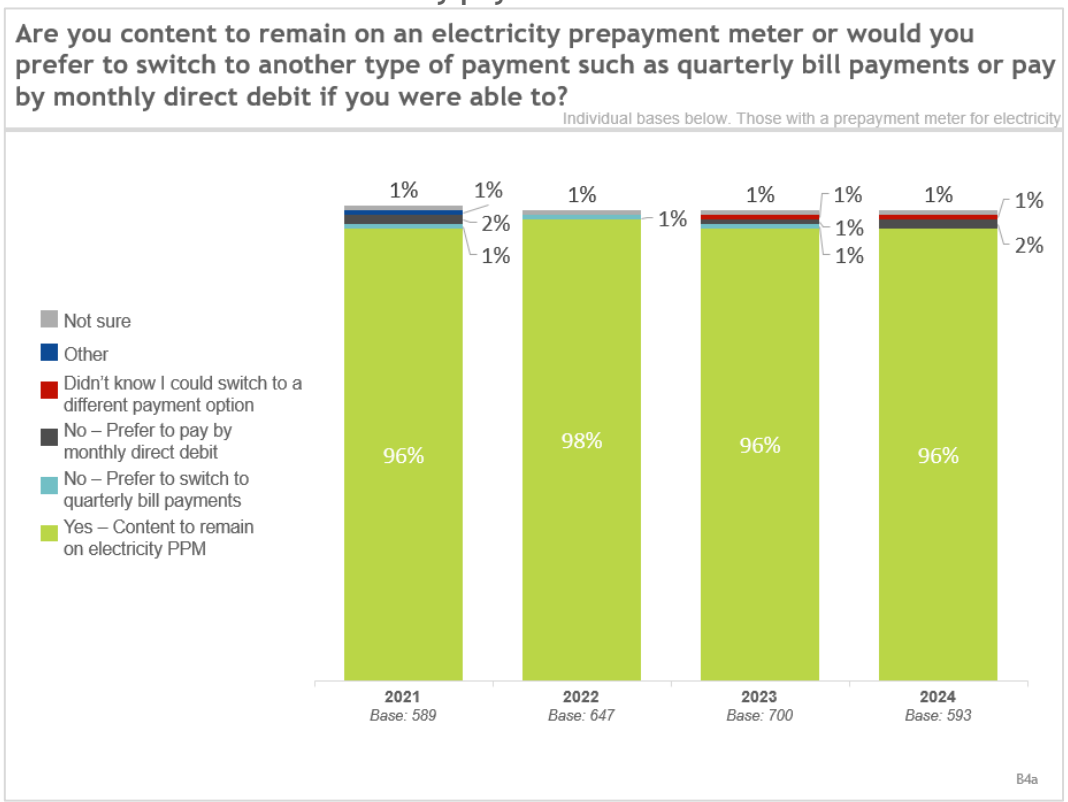


Table 5.4 Reasons for having a prepayment meter for electricity by age

		Age			
	Overall *Base: 593*	Under 35 *Base: 107*	35-44 *Base: 129*	45-64 *Base: 245*	65 plus *Base: 112*
It is convenient	79%	68%	74%	83%	88%
The property came with one	33%	55%	38%	29%	16%
Offered one by supplier	3%	5%	4%	2%	1%
To help budget energy costs	13%	14%	9%	16%	13%
Don't need to worry about being cut off due to not paying a bill	5%	4%	5%	5%	4%
To monitor energy use	9%	7%	7%	10%	11%
Never been given the option to move away from a prepayment meter	2%	3%	3%	1%	-
Other	0%	-	-	0%	-
Don't know	1%	-	-	0%	2%

The vast majority (96%) of respondents with a prepayment meter stated they were content to remain with one, while 2% confirmed that they would prefer to switch to monthly payments (see figure 5.13).

Figure 5.13 Preference for electricity payment method



Gas

Convenience (75%) was also the most common reason for having a gas prepayment meter. Much like with electricity, the percentage of respondents using a prepayment meter to monitor their energy usage has fallen from 34% in 2023 to 8% in 2024. 36% said that their property came with a prepayment meter. Older respondents (85%) were more likely to mention convenience as a reason for having a gas prepayment meter than younger respondents (65%) (see Figure 5.14 and Table 5.5).

Figure 5.14 Reasons for having a prepayment meter for gas

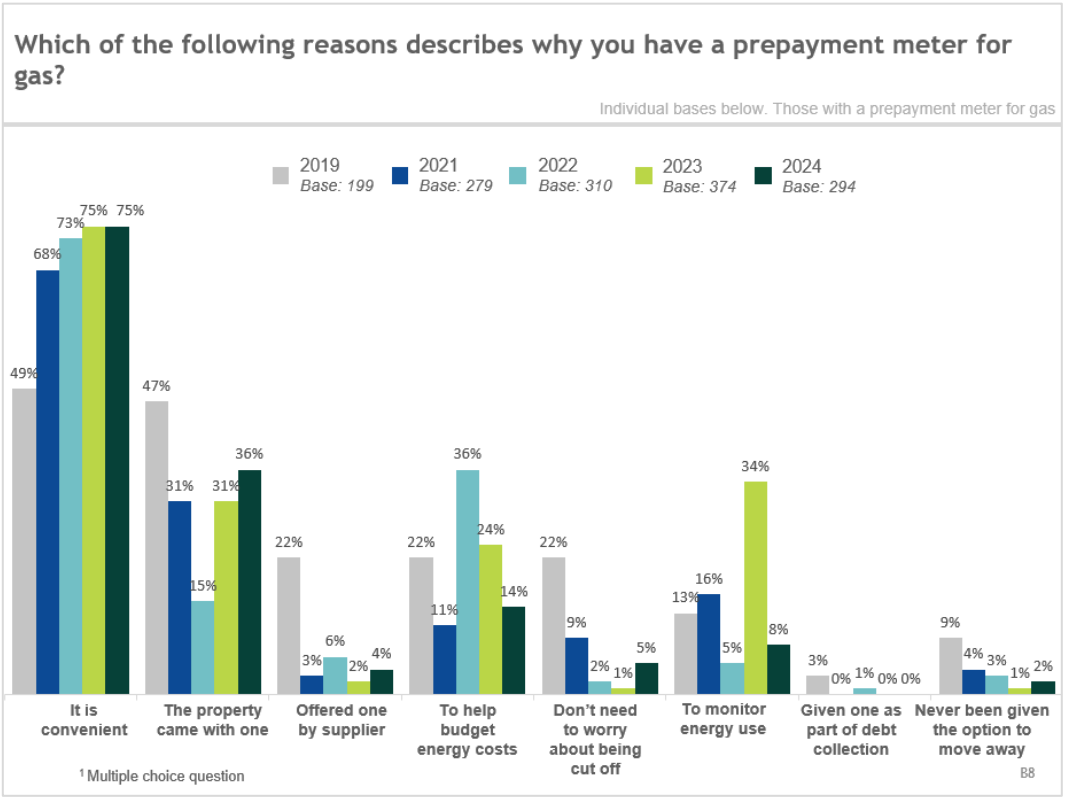
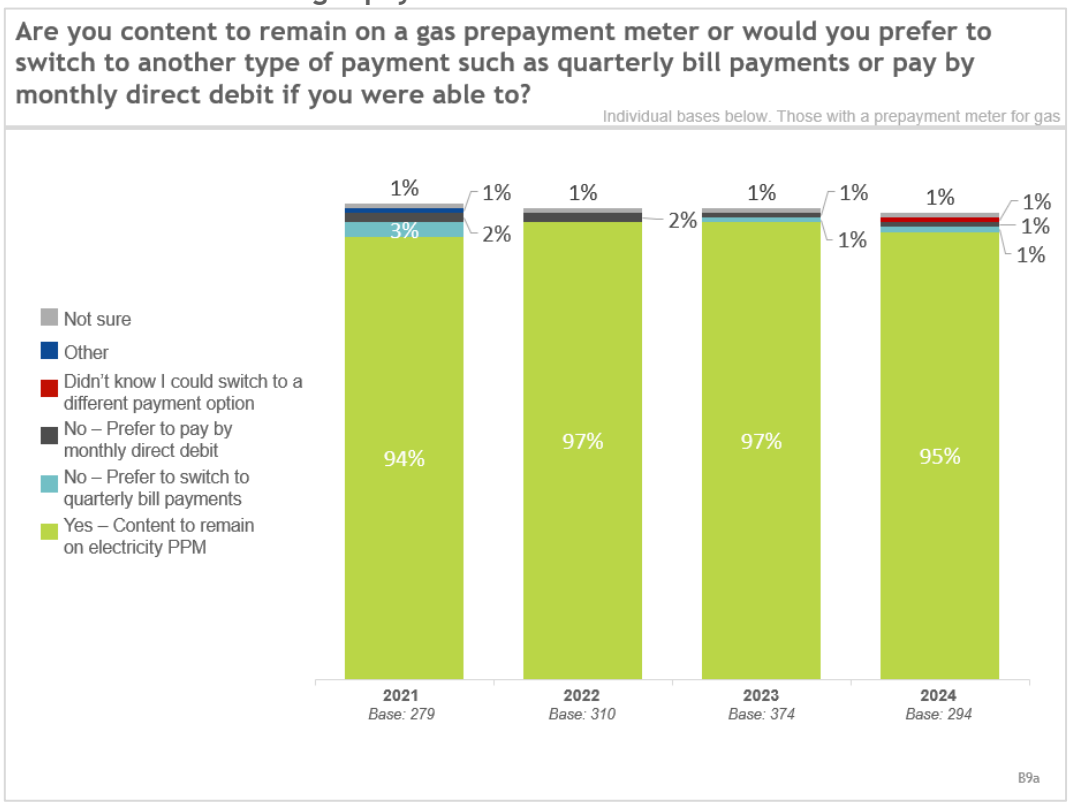


Table 5.5 Reasons for having a prepayment meter for gas by demographics

		Age			
	Overall *Base: 294*	Under 35 *Base: 71*	35-44 *Base: 63*	45-64 *Base: 107*	65 plus *Base: 53*
It is convenient	75%	65%	73%	79%	85%
The property came with one	36%	58%	37%	26%	26%
Offered one by supplier	4%	3%	2%	7%	2%
To help budget energy costs	14%	8%	13%	21%	11%
Don't need to worry about being cut off due to not paying a bill	5%	6%	5%	7%	-
To monitor energy use	8%	4%	8%	9%	11%
Given one as part of debt collection	0%	-	-	1%	-
Never been given the option to move away from a prepayment meter	2%	3%	3%	2%	-

The majority (95%) 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 either monthly or quarterly bill payments (see Figure 5.15).

Figure 5.15 Preference for gas payment method

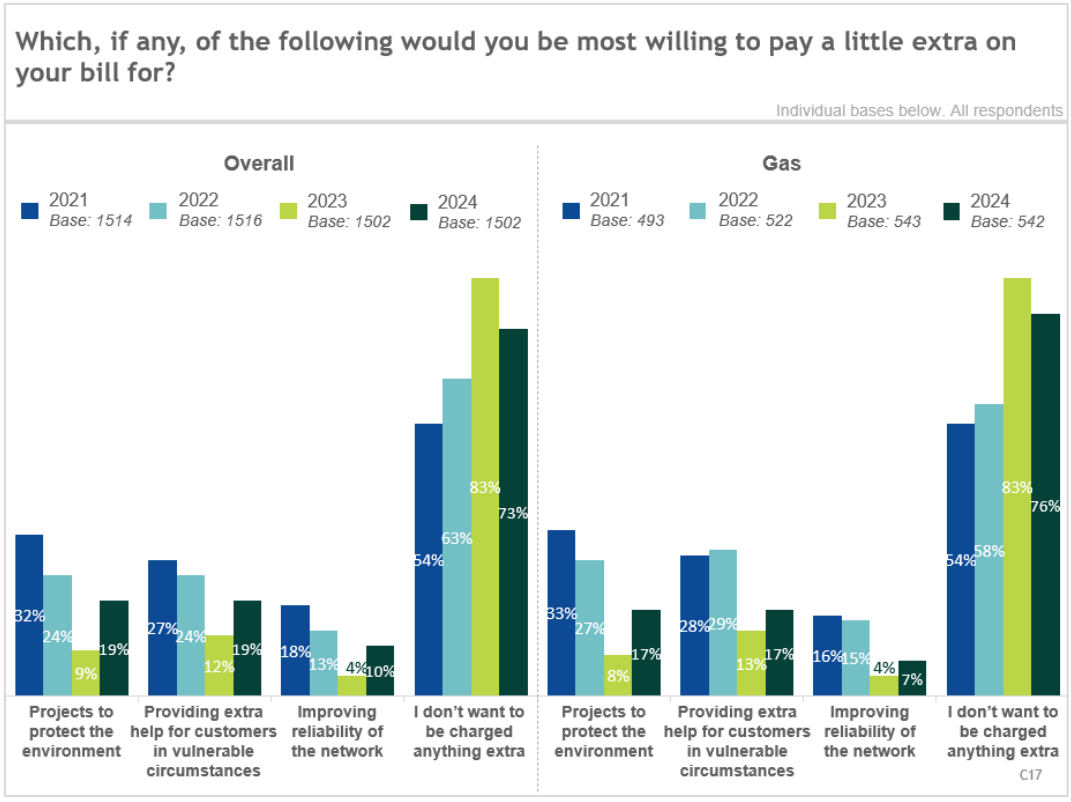


Paying extra on bill

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

Under three quarters of respondents overall (73%) reported that they would not be willing to pay anything extra; this is down from 83% in 2023. 19% would be willing to pay extra for projects that protect the environment (up from 9% in 2023), while 19% would be willing to pay extra for providing extra help to vulnerable customers (up from 12% in 2023). 10% would be willing to pay extra to improve the reliability of the network (up from 4% in 2023).

Figure 5.16 Paying extra on energy bill



Several significant differences were observed between subgroups (see table 5.9):

- Three quarters (76%) of respondents in the C2DE group did not want to be charged anything extra, compared to 70% in the ABC1 group;
- Respondents who live in social housing (14%) were less likely to say they would be willing to be charged extra compared to those who own their home (28%) and who privately rent (30%);
- Respondents living in rural areas (13%) were more likely to say they were willing to be charged extra for improving the reliability of the network compared to those in urban areas (8%);
- Four in five (81%) respondents who do not consider themselves to be confident internet users said they did not want to be charged extra on their bill, compared to 69% of confident internet users;
- Those who have a prepayment meter for electricity (24%) were less likely to state that they would be willing to be charged extra when compared with those on a credit meter (29%).

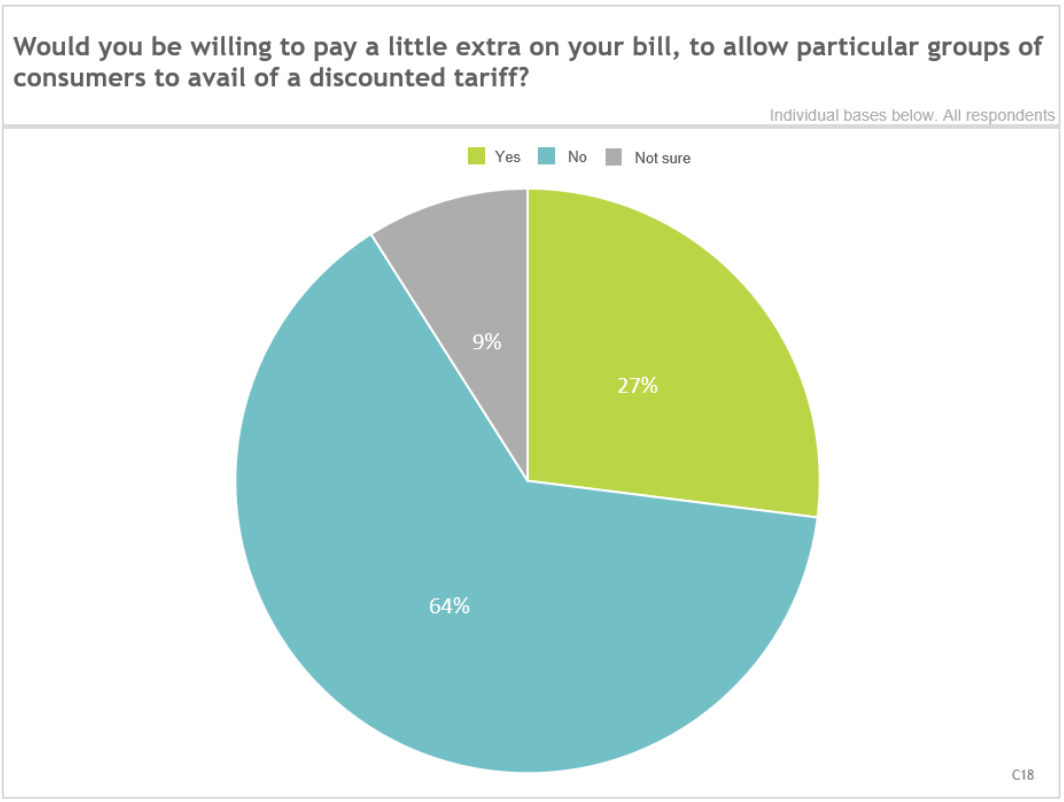
Table 5.9 Paying extra on energy bill by SEG, tenure, location, confidence using the internet, and payment method

		Projects to protect the environment	Providing extra help for vulnerable customers	Improving reliability of network	I don't want to be charged anything extra
Overall	All *Base: 1502*	19%	19%	10%	73%
SEG	ABC1 *Base: 731*	22%	23%	12%	70%
	C2DE *Base: 733*	16%	17%	8%	76%
Tenure	Owner occupied *Base: 1148*	21%	21%	11%	72%
	Private rented *Base: 174*	17%	24%	10%	70%
	Social rented *Base: 161*	9%	7%	4%	86%
Location	Urban *Base: 929*	18%	20%	8%	74%
	Rural *Base: 573*	21%	19%	13%	73%
Confidence using the internet	Not confident *Base: 237*	12%	12%	8%	81%
	Neither *Base: 256*	15%	11%	9%	81%
	Confident *Base: 1009*	22%	23%	11%	69%
Electricity payment method	Prepayment meter *Base: 593*	17%	18%	10%	76%
	Credit meter *Base: 909*	21%	20%	10%	71%

A new question was added to the 2024 Tracker in which respondents were asked whether they would be willing to pay extra on their bill to allow particular groups of consumers to avail of a discounted tariff (see figure 5.17).

Under two thirds (64%) of respondents would not be willing to pay extra on their bill for this purpose, compared to over one quarter (27%) who reported that they would be willing.

Figure 5.17 Paying extra on energy bill to allow particular consumer groups to avail of a discounted tariff



The following subgroups were more likely to say they were willing to be charged extra on their bill (see table 5.10):

- Respondents aged 18 to 34 (36%) when compared with those aged 65 and over (21%);
- Respondents in the ABC1 group (32%) when compared with those in the C2DE group (22%);
- Respondents who own their home (28%) and who privately rent (28%) when compared to those living in social housing (17%);
- Respondents living in the least deprived areas (31%) when compared to those living in the most deprived areas (21%);
- Respondents who do not have someone with a disability or illness in their household (29%) when compared with those that do (22%);
- Respondents who are not considered to be vulnerable (28%) when compared with those in the high or medium vulnerability group (23%);
- Respondents who say they are confident internet users (31%) when compared with those who are not confident users (17%).

Table 5.10 Paying extra on energy bill to allow particular consumer groups to avail of a discounted tariff by demographics, tenure, deprivation, disability/illness, vulnerability, and confidence using the internet

		Yes	No	Not sure	*Total*
Overall	All *Base: 1502*	27%	64%	9%	*100%*
Age	Under 35 *Base:213*	36%	53%	11%	*100%*
	35-44 *Base: 271*	27%	64%	9%	*100%*
	45-64 *Base: 592*	28%	66%	7%	*100%*
	65 plus *Base: 426*	21%	69%	10%	*100%*
SEG	ABC1 *Base: 731*	32%	60%	8%	*100%*
	C2DE *Base: 733*	22%	69%	9%	*100%*
Tenure	Own home *Base: 1148*	28%	64%	8%	*100%*
	Private renting *Base: 174*	28%	61%	11%	*100%*
	Social housing *Base: 161*	17%	71%	12%	*100%*
MDM Quintile	1 - Most deprived *Base: 271*	21%	69%	10%	*100%*
	2 *Base: 301*	25%	66%	9%	*100%*
	3 *Base: 315*	22%	70%	8%	*100%*
	4 *Base: 314*	33%	57%	10%	*100%*
	5 - Least deprived *Base: 301*	31%	61%	8%	*100%*
Disability/ illness	Yes *Base: 242*	22%	70%	8%	*100%*
	No *Base: 1107*	29%	64%	7%	*100%*
Vulnerability	High/medium vulnerability *Base: 623*	23%	68%	9%	*100%*
	Low vulnerability *Base: 57*	40%	46%	14%	*100%*
	Not vulnerable *Base: 822*	28%	63%	9%	*100%*
Confidence using the internet	Not confident *Base: 237*	17%	73%	11%	*100%*
	Neither *Base: 256*	17%	74%	9%	*100%*
	Confident *Base: 1009*	31%	60%	9%	*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.

6. Interactions with energy suppliers

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

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

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

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

Key findings

- There has been a decrease in customer engagement with written communications received from their supplier. 42% of electricity customers reported reading their correspondence in full (compared to 50% in 2023), while 41% of gas consumers reported reading their correspondence in full (compared to 49% in 2023).
- Similar proportions reported receiving correspondence from their electricity supplier in the post (38%) and via email or online (38%), while gas customers were more likely to receive correspondence through the post (49%, compared to 27% through email or online).
- Of those respondents who had glanced at or read their written correspondence, there has been a decrease in understanding of this correspondence.
  - 76% of electricity respondents agreed or strongly agreed that the information was clear and understandable (compared to 83% in 2023); and
  - 73% of gas consumers agreed or strongly agreed that the information was clear and understandable (compared to 81% in 2023).
- Overall levels of trust in electricity suppliers were similar to those in 2023:
  - 67% trusted their supplier to treat them fairly (compared to 70% in 2023); and
  - 60% trusted their supplier to give them a fair price (compared to 61% in 2023).
- There has been a decrease in consumers who completely trust their electricity suppliers:
  - 16% of electricity consumers said they completely trust their supplier to treat them fairly (compared to 24% in 2023); and
  - 13% stated they completely trust their supplier to give them a fair price (compared to 22% in 2023).
- Similar levels of trust as in the previous Tracker were observed with gas consumers:
  - 65% trusted their supplier to treat them fairly (compared to 64% in 2023); and
  - 61% trusted their supplier to give them a fair price (compared to 56% in 2023).
- There has been a slight decrease in consumer satisfaction with overall service from suppliers:
  - 80% of domestic consumers reported being satisfied or very satisfied with their electricity supplier (compared to 84% in 2023); and
  - 75% were satisfied or very satisfied with their gas supplier (compared to 82% in 2023).

- 9% contacted their electricity supplier in the last year for a reason other than making a complaint. The most common reasons for this was; querying a bill (32%), switching energy contract (30%), and a payment issue (11%).
- Of those that made contact; 82% found it easy to get in touch, 77% thought they were listened to, 72% felt they were treated fairly, and 72% said that their electricity supplier was supportive.

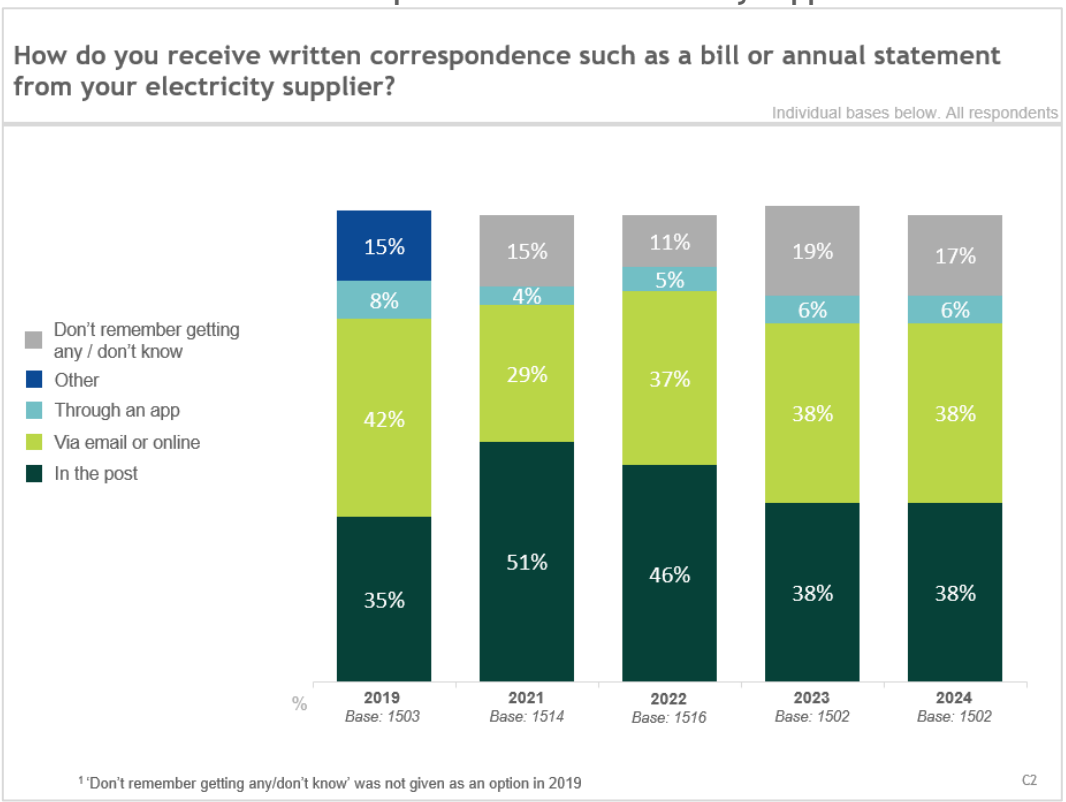
Written correspondence

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

Electricity

Around two in five (38%) of domestic consumers say they receive written correspondence from their electricity supplier in the post, while a further 38% receive it via email or online. 17% of respondents did not remember receiving any correspondence or were unsure in what form it came. Respondents who have a prepayment meter for electricity (33%) were more likely to be unsure how they receive written correspondence from their supplier than those who have a credit meter (7%) (see Figure 6.1).

Figure 6.1 Form of written correspondence from electricity supplier



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

- 46% of respondents aged 65 and over said they receive their correspondence in the post, compared to over one third (35%) of those in the 18 to 34 year old group;
- Those in the C2DE group (42%) were more likely to say they receive correspondence through the post compared to those in the ABC1 group (34%), who were instead more likely to receive theirs electronically (46%, compared to 30% in the C2DE group). One fifth (22%) of C2DE respondents did not remember receiving correspondence in comparison with 13% in the ABC1 group;
- Two fifths (42%) of those who own their home said they receive correspondence electronically, compared to 28% who privately rent and 23% living in social housing. Home owners were also less likely to not know in what format they receive correspondence (14%, compared to 26% of private renters and 33% in social housing);
- Respondents living in the least deprived areas (52%) were more likely to mention that they receive correspondence online than those in the most deprived areas (30%), who were more likely to receive theirs in the post (41%, compared to 32% in the least deprived areas);
- 22% of those who have someone in the household with a disability or illness were unsure what form they receive written correspondence in, compared to 16% of those who do not have someone in their household with a disability or illness;
- Respondents who do not have children living in their household (41%) were more likely to receive written correspondence in the post when compared to those that do have children in their household (31%);
- Respondents in the high or medium vulnerability group (20%, compared to 15% who are not vulnerable) were less likely to know how they receive written correspondence;
- Those who do not consider themselves to be confident internet users (25%) were less likely to be know what format they receive written correspondence in when compared with those who are confident internet users (15%);
- 47% of those who have switched electricity supplier in the last three years reported that they receive written correspondence via email or online, compared to 33% of non-switchers;
- Respondents who have self-disconnected from their electricity supply (25%) were more likely to say they did not remember receiving written correspondence from their electricity supplier than those who have not self-disconnected (16%).

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

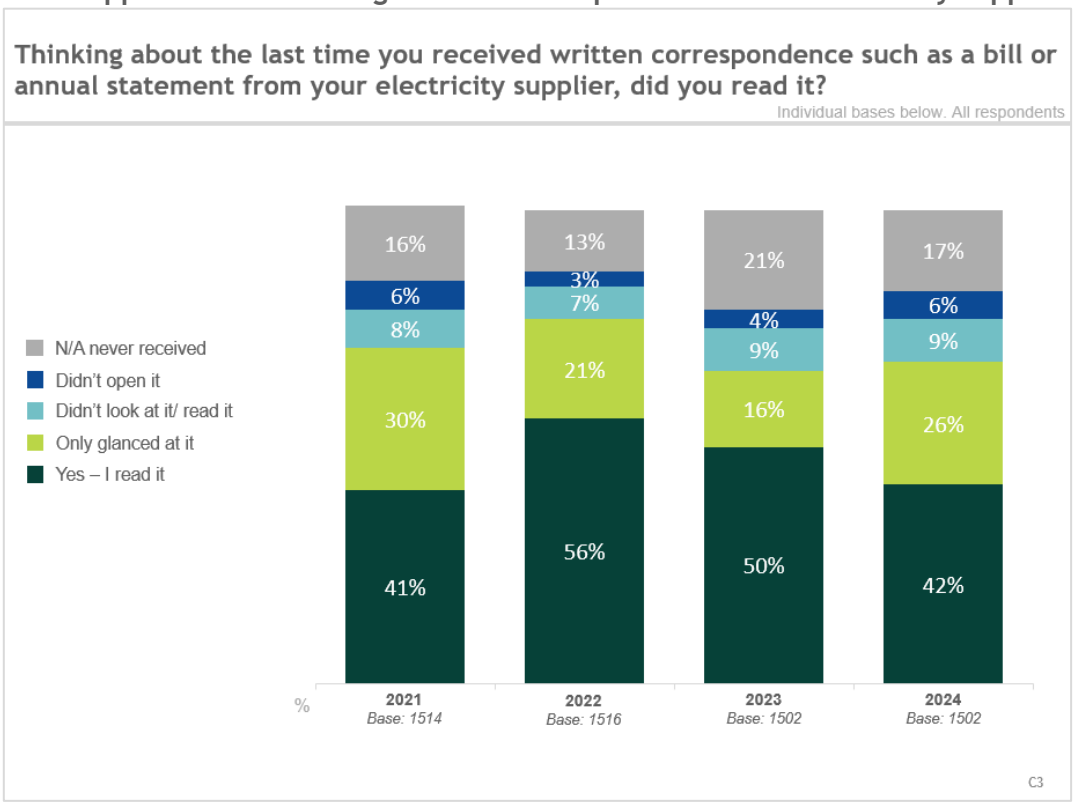
		In the post	Email / online	Through an app	Other	Not sure	*Total*
Overall	All *Base: 1502*	38%	38%	6%	0%	17%	*100%*
Age	Under 35 *Base:213*	35%	37%	10%	-	18%	*100%*
	35-44 *Base:271*	32%	42%	8%	-	17%	*100%*
	45-64 *Base:592*	37%	41%	6%	-	16%	*100%*
	65 plus *Base: 426*	46%	32%	3%	0%	19%	*100%*

Table 6.1 (cont.) Form of written correspondence from electricity supplier by demographics, tenure, deprivation, disability/illness, children, vulnerability, confidence using the internet, payment method, switching, self-disconnection

		In the post	Email / online	Through an app	Other	Not sure	*Total*
Overall	All *Base: 1502*	38%	38%	6%	0%	17%	*100%*
SEG	ABC1 *Base: 731*	34%	46%	7%	0%	13%	*100%*
	C2DE *Base: 733*	42%	30%	6%	-	22%	*100%*
Tenure	Owner occupied *Base: 1148*	37%	42%	7%	0%	14%	*100%*
	Private rented *Base: 174*	44%	28%	2%	-	26%	*100%*
	Social rented *Base: 161*	39%	23%	5%	-	33%	*100%*
MDM Quintile	1 - Most deprived *Base: 271*	41%	30%	4%	-	25%	*100%*
	2 *Base: 301*	40%	34%	6%	-	20%	*100%*
	3 *Base: 315*	42%	34%	11%	-	12%	*100%*
	4 *Base: 314*	37%	39%	8%	-	17%	*100%*
	5 - Least deprived *Base: 301*	32%	52%	2%	0%	13%	*100%*
Disability/ illness	Yes *Base: 242*	40%	29%	8%	-	22%	*100%*
	No *Base: 1107*	38%	38%	7%	0%	16%	*100%*
Children	Yes *Base: 449*	31%	41%	9%	-	19%	*100%*
	No *Base: 1027*	41%	37%	5%	0%	17%	*100%*
Vulnerability	High/medium vulnerability *Base: 623*	38%	35%	7%	-	20%	*100%*
	Low vulnerability *Base: 57*	28%	47%	9%	-	16%	*100%*
	Not vulnerable *Base: 822*	39%	40%	6%	0%	15%	*100%*
Confidence using the internet	Not confident *Base: 237*	54%	17%	3%	-	25%	*100%*
	Neither *Base: 256*	40%	37%	6%	-	17%	*100%*
	Confident *Base: 1009*	34%	43%	7%	0%	15%	*100%*
Electricity payment method	Prepayment meter *Base: 593*	35%	22%	9%	0%	33%	*100%*
	Credit meter *Base: 909*	40%	48%	5%	-	7%	*100%*
Electricity switching	Switchers *Base: 517*	26%	47%	7%	0%	19%	*100%*
	Non-switchers *Base: 985*	45%	33%	6%	-	16%	*100%*
Electricity self-disconnection	Yes *Base: 162*	41%	28%	7%	-	25%	*100%*
	No *Base: 1335*	38%	39%	6%	0%	16%	*100%*

Two thirds (68%) stated that they read or glanced at the latest correspondence they received from their electricity supplier (up slightly from 66% in 2023), while 15% did not look at it or open it. 17% reported that they did not receive any written correspondence from their electricity supplier, compared to 21% in 2023. Half (52%) of credit customers said that they read the last piece of written correspondence they received from their supplier, compared to one quarter (27%) of those with a prepayment meter for electricity. Those on a prepayment meter (35%) were also more likely to report that they had not received any correspondence when compared with those who have a credit meter (6%) (see Figure 6.2 and Table 6.2).

Figure 6.2 Approach to receiving written correspondence from electricity supplier



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

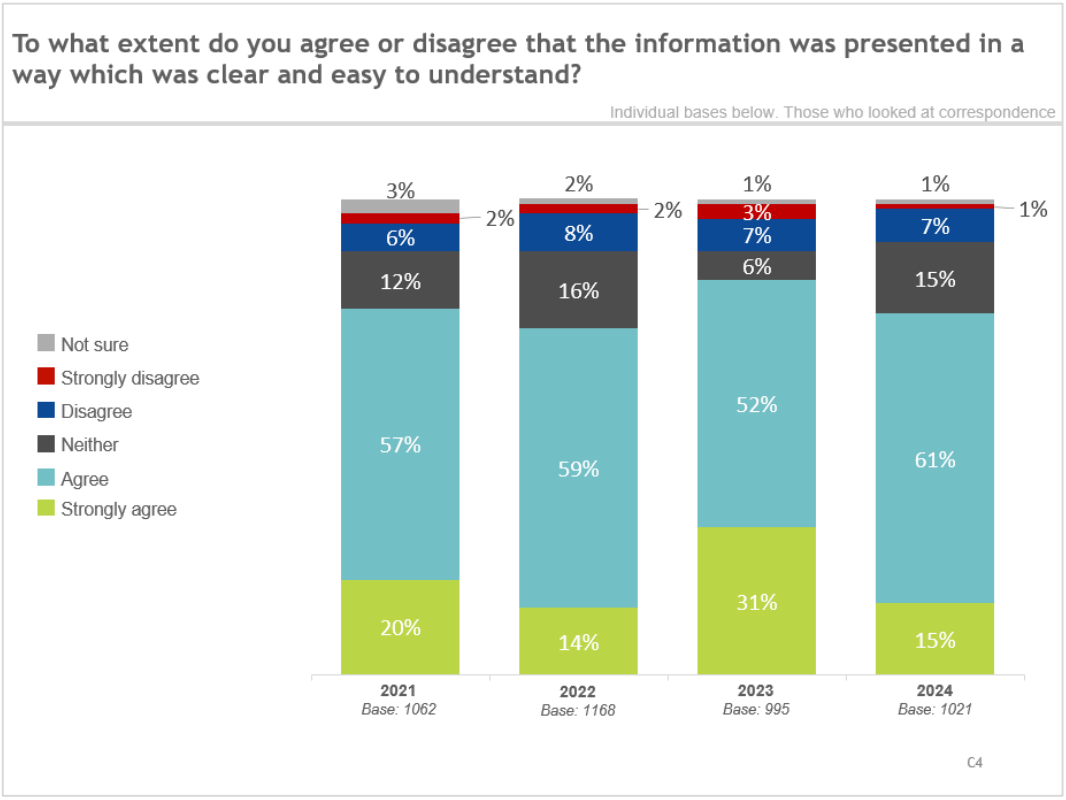
- Respondents aged 65 and over (48%) were more likely than those aged 18 to 34 (28%) to say they read the last piece of correspondence from their electricity supplier;
- Those in the ABC1 group (46%) were more likely to read the last piece of correspondence they received than those in the C2DE group (38%), who were instead more likely to suggest they had not received any correspondence (22%, compared to 13% in the ABC1 group);
- Those who own their home (46%) were more likely than respondents who live in social housing (34%) and who privately rent (24%) to say that they read the correspondence they last received from their electricity supplier;
- Respondents living in the most deprived areas (26%) were more likely than those living in the least deprived areas (13%) to report that they did not receive any written correspondence from their electricity supplier;
- Those who have someone in their household with a disability or illness (22%) were more likely to say they did not receive written correspondence than those respondents who do not have someone in their household with a disability or illness (17%);
- One fifth (21%) of those in the high or medium vulnerability group stated that they did not receive written correspondence from their electricity supplier, compared to 15% who are not considered vulnerable;
- Those who do not consider themselves confident internet users were also more likely to suggest they did not receive any correspondence (24%, compared to 16% of confident users); and
- Respondents who had self-disconnected from their electricity supply (33%) were more likely to confirm that they only glanced at the last piece of written correspondence when compared to those who had not self-disconnected (25%).

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

		Read it	Only glanced at it	Didn't look at it / read it	Didn't open it	N/A never received	*Total*
Overall	All *Base: 1502*	42%	26%	9%	6%	17%	*100%*
Age	Under 35 *Base:213*	28%	31%	12%	14%	15%	*100%*
	35-44 *Base:271*	40%	25%	12%	5%	18%	*100%*
	45-64 *Base:592*	44%	25%	9%	5%	17%	*100%*
	65 plus *Base: 426*	48%	24%	4%	5%	19%	*100%*
SEG	ABC1 *Base: 731*	46%	27%	8%	5%	13%	*100%*
	C2DE *Base: 733*	38%	25%	9%	7%	22%	*100%*
Tenure	Owner occupied *Base: 1148*	46%	26%	9%	5%	14%	*100%*
	Private rented *Base: 174*	24%	29%	9%	14%	24%	*100%*
	Social rented *Base: 161*	34%	24%	6%	4%	32%	*100%*
MDM Quintile	1 - Most deprived *Base: 271*	36%	24%	9%	5%	26%	*100%*
	2 *Base: 301*	45%	23%	5%	8%	19%	*100%*
	3 *Base: 315*	41%	27%	11%	6%	15%	*100%*
	4 *Base: 314*	45%	26%	9%	5%	16%	*100%*
	5 - Least deprived *Base: 301*	44%	29%	8%	7%	13%	*100%*
Disability/ illness	Yes *Base: 242*	38%	29%	5%	6%	22%	*100%*
	No *Base: 1107*	42%	26%	9%	6%	17%	*100%*
Vulnerability	High/medium vulnerability *Base: 623*	41%	25%	8%	5%	21%	*100%*
	Low vulnerability *Base: 57*	26%	33%	19%	5%	16%	*100%*
	Not vulnerable *Base: 822*	44%	26%	8%	7%	15%	*100%*
Confidence using the internet	Not confident *Base: 237*	40%	24%	7%	5%	24%	*100%*
	Neither *Base: 256*	41%	26%	10%	5%	18%	*100%*
	Confident *Base: 1009*	43%	26%	9%	7%	16%	*100%*
Electricity payment method	Prepayment meter *Base: 593*	27%	21%	10%	7%	35%	*100%*
	Credit meter *Base: 909*	52%	29%	8%	5%	6%	*100%*
Electricity switching	Switchers *Base: 517*	44%	23%	9%	6%	18%	*100%*
	Non-switchers *Base: 985*	41%	27%	9%	6%	17%	*100%*
Electricity self-disconnection	Yes *Base: 162*	29%	33%	12%	4%	22%	*100%*
	No *Base: 1335*	44%	25%	8%	6%	17%	*100%*

Of those who glanced at or read the written correspondence they received, three quarters (76%) agreed or strongly agreed that the information had been presented in a way which was clear and easy to understand, compared to 8% who did not think that this was the case. This compares to 83% and 10% respectively from the 2023 Tracker. It should also be noted that the proportion of respondents who neither agreed nor disagreed increased from 6% in 2023 to 15% (see Figure 6.3).

Figure 6.3 Understanding of written correspondence from electricity supplier



Subgroup analysis revealed the following significant differences (see Table 6.3):

- Those respondents who live in social housing (17%) were more likely to say they disagree than those who own their home (8%) and who privately rent (5%);
- Respondents living in urban areas were more likely to disagree (10%, compared to 6% in rural areas);
- Those who do not have someone living in their household with a disability or illness (78%) were more likely to agree when compared with those who do have someone in their household with a disability or illness (67%);
- Those who consider themselves to be confident internet users (80%) were more likely to agree than those who are not confident users (66%);
- Respondents who have a credit meter for electricity (79%) were more likely to agree than those on a prepayment meter (71%);
- Electricity switchers (12%) and those who had self-disconnected from their electricity supply (22%) were more likely to disagree than non-switchers (6%) and respondents who had not self-disconnected (7%).

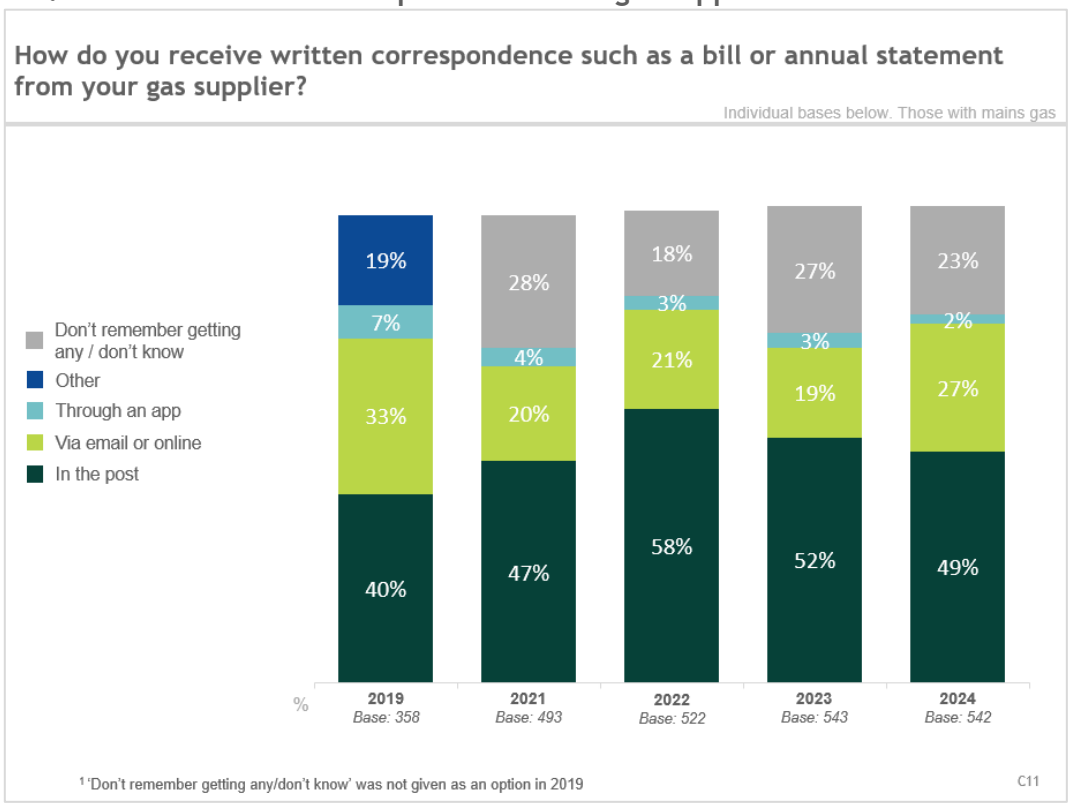
Table 6.3 Understanding of written correspondence from electricity supplier by age, tenure, location, disability/illness, confidence using the internet, electricity payment method, switching and self-disconnection

		Disagree	Neither	Agree	Not sure	*Total*
Overall	All *Base: 1021*	8%	15%	76%	1%	*100%*
Age	Under 35 *Base: 126*	10%	15%	73%	2%	*100%*
	35-44 *Base: 176*	6%	11%	82%	1%	*100%*
	45-64 *Base: 412*	10%	16%	74%	0%	*100%*
	65 plus *Base: 307*	7%	15%	78%	1%	*100%*
Tenure	Owner occupied *Base: 824*	8%	15%	77%	0%	*100%*
	Private rented *Base: 92*	5%	14%	77%	3%	*100%*
	Social rented *Base: 94*	17%	16%	66%	1%	*100%*
Location	Urban *Base: 616*	10%	13%	76%	0%	*100%*
	Rural *Base: 405*	6%	17%	76%	1%	*100%*
Disability/ illness	Yes *Base: 162*	12%	20%	67%	1%	*100%*
	No *Base: 757*	8%	14%	78%	0%	*100%*
Confidence using the internet	Not confident *Base: 153*	11%	22%	66%	1%	*100%*
	Neither *Base: 171*	6%	22%	70%	2%	*100%*
	Confident *Base: 697*	8%	11%	80%	0%	*100%*
Electricity payment method	Prepayment meter *Base: 286*	10%	18%	71%	1%	*100%*
	Credit meter *Base: 735*	7%	14%	79%	1%	*100%*
Electricity switching	Switchers *Base: 349*	12%	15%	73%	-	*100%*
	Non-switchers *Base: 672*	6%	15%	78%	1%	*100%*
Electricity self-disconnection	Yes *Base: 101*	22%	24%	53%	1%	*100%*
	No *Base: 917*	7%	14%	79%	1%	*100%*

Gas

Those with gas heating were more likely to receive correspondence from their supplier through the post (49%), while one quarter (27%) obtain theirs in an email or online. 23% stated that they did not remember receiving any written correspondence from their supplier or in what form it came, decreasing from 27% in 2023. 36% of respondents who have a gas prepayment meter stated that they were not sure whether they had received any correspondence, compared to 7% of credit customers (see Figure 6.4 and Table 6.4).

Figure 6.4 Form of written correspondence from gas supplier



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

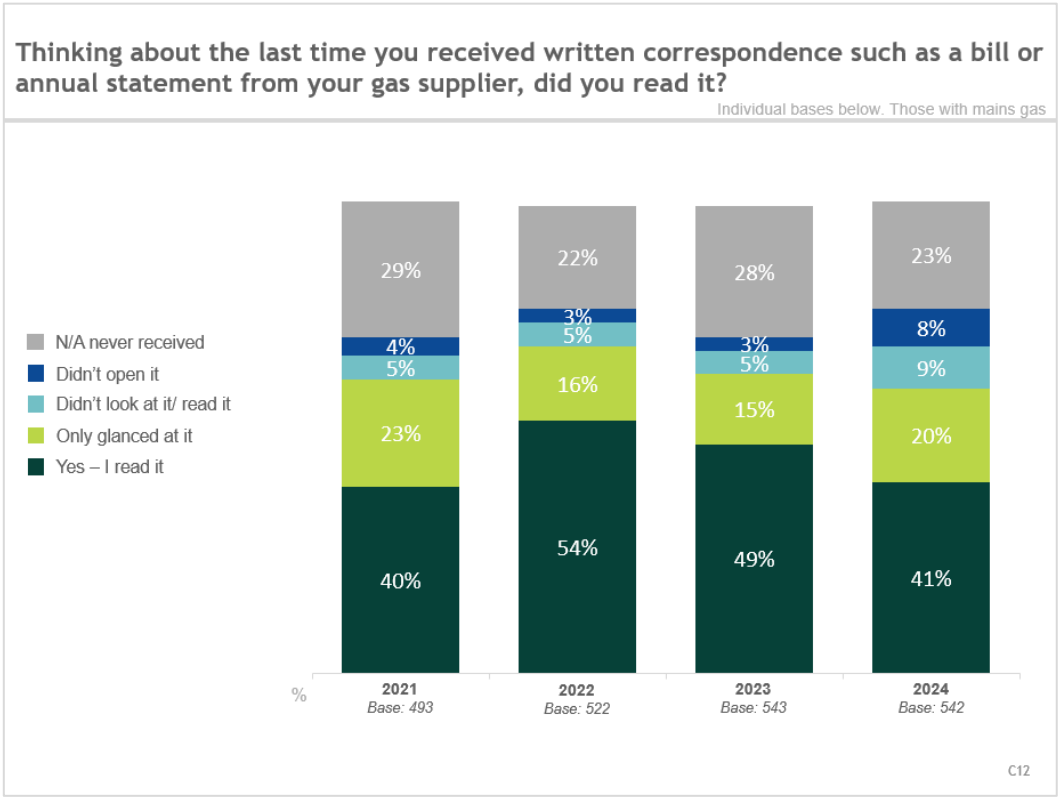
- 30% of gas customers in the C2DE group did not know the form of correspondence, compared to 15% in the ABC1 group;
- Those who privately rent (39%) and who live in social housing (35%) were less likely to be aware of the correspondence format, compared to 16% of those who own their home;
- Respondents living in the most deprived areas (29%) were more likely than those in the least deprived areas (17%) to not remember what format they receive written correspondence in.

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

		In the post	Email / online	Through an app	Not sure	*Total*
Overall	All *Base: 542*	49%	27%	2%	23%	*100%*
SEG	ABC1 *Base: 248*	49%	35%	2%	15%	*100%*
	C2DE *Base: 276*	48%	20%	1%	30%	*100%*
Tenure	Owner occupied *Base: 355*	49%	33%	2%	16%	*100%*
	Private rented *Base: 70*	34%	27%	-	39%	*100%*
	Social rented *Base: 108*	56%	7%	2%	35%	*100%*
MDM Quintile	1 - Most deprived *Base: 145*	57%	14%	-	29%	*100%*
	2 *Base: 81*	44%	25%	5%	26%	*100%*
	3 *Base: 68*	62%	19%	3%	16%	*100%*
	4 *Base: 86*	38%	36%	1%	24%	*100%*
	5 - Least deprived *Base: 162*	44%	38%	1%	17%	*100%*
Gas payment method	Prepayment meter *Base: 294*	48%	15%	2%	36%	*100%*
	Credit meter *Base: 248*	50%	41%	2%	7%	*100%*

Two in five (41%) gas customers stated that they read the last written correspondence they received from their supplier with one fifth (20%) saying they only glanced at it. 17% said they neither read nor opened it, increasing from 8% in 2023, and a further 23% reported to have never received any correspondence. One third (34%) of respondents who have a prepayment meter for gas said they never received any correspondence, compared to 9% of those on a credit meter. (see Figure 6.5 and Table 6.6).

Figure 6.5 Approach to receiving written correspondence from gas supplier



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

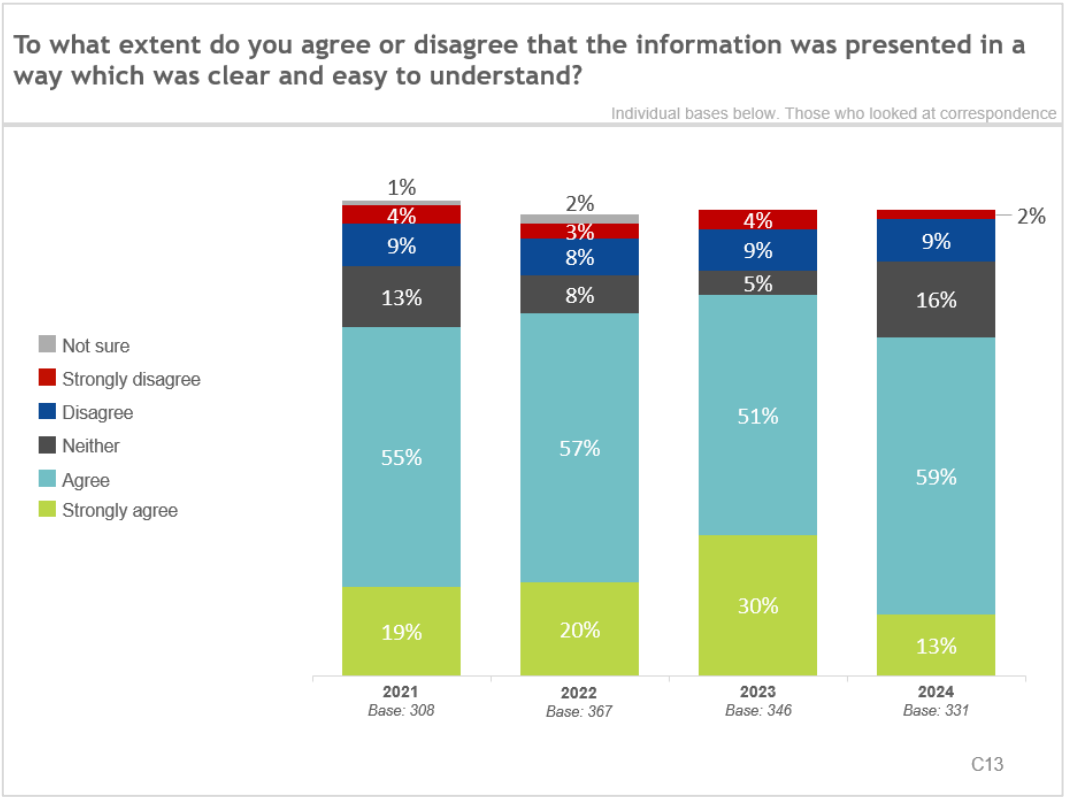
- Respondents aged 18 to 34 (23%) were least likely to confirm that they read the correspondence compared to all other age groups (48% aged 35 to 44, 43% aged 45 to 64, and 45% aged 65 plus);
- Those in the C2DE group (28%) were more likely to say they never received any written correspondence when compared to those in the ABC1 group (16%);
- 34% of respondents living in social housing and 34% who privately rent said that never received written correspondence, compared to 17% who own their home;
- Those living in the most deprived areas (30%) were more likely than those living in the least deprived areas (17%) to say they never received correspondence.

Table 6.5 Approach to receiving written correspondence from gas supplier by demographics, tenure, deprivation, and gas payment method

		Read it	Glanced at it	Didn't read it	Didn't open it	Never received	*Total*
Overall	All *Base: 542*	41%	20%	9%	8%	23%	*100%*
Age	Under 35 *Base: 105*	23%	24%	12%	13%	28%	*100%*
	35-44 *Base: 99*	48%	16%	10%	8%	17%	*100%*
	45-64 *Base: 202*	43%	22%	8%	5%	21%	*100%*
	65 plus *Base: 136*	45%	19%	5%	7%	24%	*100%*
SEG	ABC1 *Base: 248*	44%	26%	8%	6%	16%	*100%*
	C2DE *Base: 276*	37%	17%	9%	9%	28%	*100%*
Tenure	Owner occupied *Base: 355*	46%	22%	9%	6%	17%	*100%*
	Private rented *Base: 70*	17%	17%	11%	20%	34%	*100%*
	Social rented *Base: 108*	37%	19%	5%	5%	34%	*100%*
MDM Quintile	1 - Most deprived *Base: 145*	39%	21%	8%	3%	30%	*100%*
	2 *Base: 81*	46%	12%	6%	11%	25%	*100%*
	3 *Base: 68*	40%	21%	13%	9%	18%	*100%*
	4 *Base: 86*	34%	17%	13%	13%	23%	*100%*
	5 - Least deprived *Base: 162*	44%	26%	6%	7%	17%	*100%*
Gas payment method	Prepayment meter *Base: 294*	33%	16%	10%	7%	34%	*100%*
	Credit meter *Base: 248*	50%	26%	8%	8%	9%	*100%*

Three quarters (73%, down from 81% in 2023) agreed or strongly agreed that the information they had received was presented in a way which was clear and easy for them to understand, with no significant difference between gas customers with a prepayment meter or a credit meter. 11% disagreed or strongly disagreed with this. The proportion of respondents who neither agreed nor disagreed increased from 5% in 2023 to 16% in 2024 (see Figure 6.6 and Table 6.5).

Figure 6.6 Understanding of written correspondence from gas supplier



Respondents living in the most deprived areas (21%) were more likely to disagree that the information was clear and easy to understand in comparison with those in the least deprived areas (8%). Those who have children living in their household (17%) were also more likely to disagree than those without children (8%).

Table 6.6 Understanding of written correspondence from gas supplier by deprivation, children, and gas payment method

		Disagree	Neither	Agree	Not sure	*Total*
Overall	All *Base: 331*	11%	16%	73%	0%	*100%*
MDM Quintile	1 - Most deprived *Base: 86*	21%	13%	66%	-	*100%*
	2 *Base: 47*	13%	13%	74%	-	*100%*
	3 *Base: 41*	2%	17%	78%	2%	*100%*
	4 *Base: 44*	9%	11%	80%	-	*100%*
	5 - Least deprived *Base: 113*	8%	20%	72%	-	*100%*
Children	Yes *Base: 98*	17%	13%	69%	-	*100%*
	No *Base: 224*	8%	17%	75%	0%	*100%*
Gas payment method	Prepayment meter *Base: 144*	12%	16%	72%	-	*100%*
	Credit meter *Base: 187*	11%	16%	73%	1%	*100%*

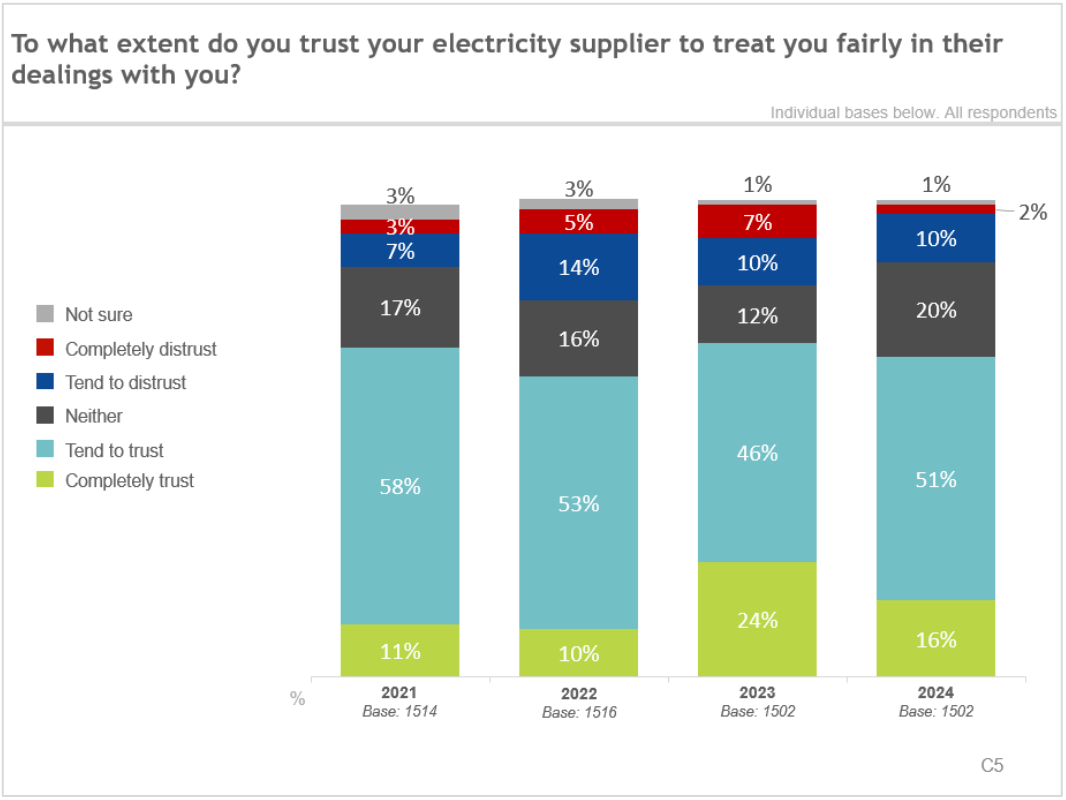
Level of trust in electricity or gas supplier

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

Electricity

67% of domestic consumers trust their electricity supplier to treat them fairly in their dealings, compared to 12% who do not trust their supplier to treat them fairly. The proportion of respondents who 'completely trust' their supplier has decreased from 24% in 2023 to 16% (see Figure 6.7).

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



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

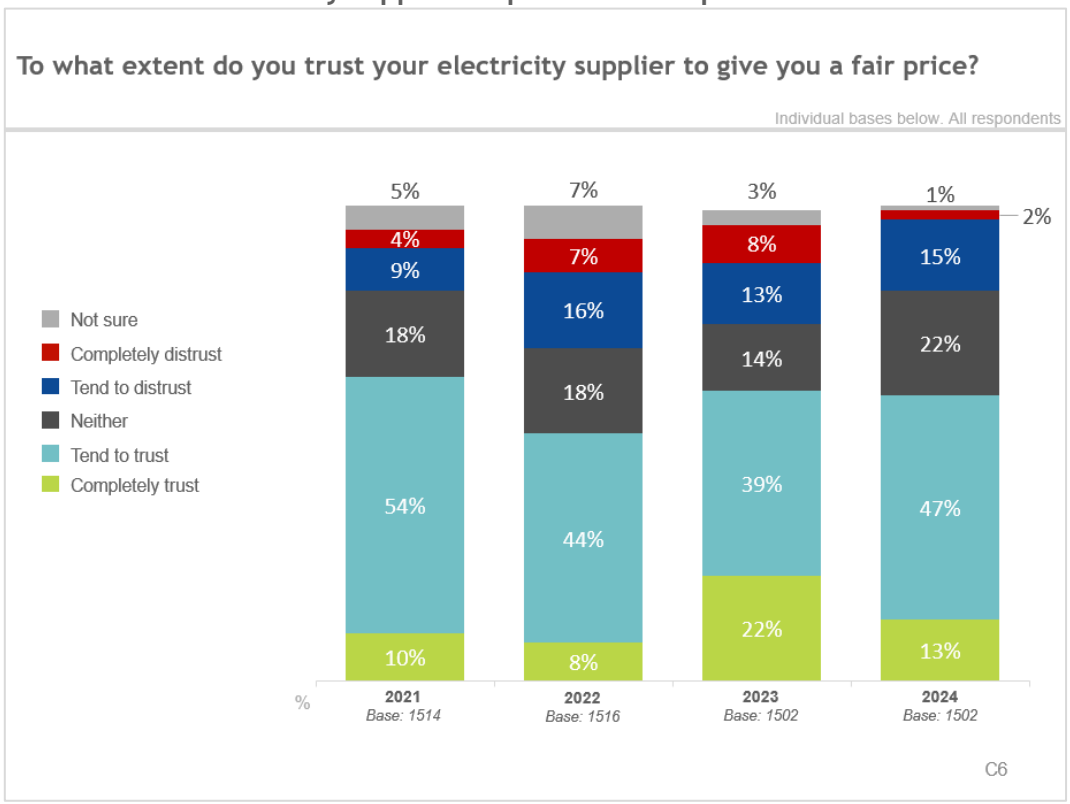
- Respondents who do not have someone in their household with a disability or illness (70%) were more likely to say they trust their supplier to treat them fairly than those who do have someone in their household with a disability or illness (60%);
- Those who are not considered vulnerable (70%) were more likely to say they trust their supplier than respondents in the high or medium vulnerability group (64%);
- Respondents who have switched electricity supplier in the last three years (64%) were less likely to trust their supplier to treat them fairly than those who have not switched (69%);
- Those who have self-disconnected from their electricity supply (53%) were less likely to indicate that they trust their supplier than those who have not self-disconnected (69%).

Table 6.7 Trust in electricity supplier to treat customers fairly by disability/illness, vulnerability, electricity switching, electricity self-disconnection

		Distrust	Neither	Trust	Not sure	*Total*
Overall	All *Base: 1502*	12%	20%	67%	1%	*100%*
Disability/ illness	Yes *Base: 242*	15%	24%	60%	1%	*100%*
	No *Base: 1107*	11%	19%	70%	1%	*100%*
Vulnerability	High/medium vulnerability *Base: 623*	13%	22%	64%	1%	*100%*
	Low vulnerability *Base: 57*	7%	23%	70%	-	*100%*
	Not vulnerable *Base: 822*	11%	18%	70%	1%	*100%*
Electricity switching	Switchers *Base: 517*	15%	21%	64%	0%	*100%*
	Non-switchers *Base: 985*	10%	19%	69%	1%	*100%*
Electricity self-disconnection	Yes *Base: 162*	25%	21%	53%	1%	*100%*
	No *Base: 1335*	10%	20%	69%	1%	*100%*

Three in five (60%) respondents said they trust their supplier to give a fair price, including 13% who 'completely trust' their supplier (compared to 22% in 2023). This compares to one fifth (17%) who did not trust their supplier to provide a fair price. 22% stated that they neither trust nor distrust their electricity supplier, compared to 14% in 2023 (see Figure 6.8).

Figure 6.8 Trust in electricity supplier to provide a fair price



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

- Respondents who do not have someone in their household with a disability or illness (62%) were more likely to say they trust their supplier compared to those who do have someone with a disability or illness in their household (54%);
- Those who are not considered to be vulnerable (63%) were more likely to state that they trust their electricity supplier compared to those in the high or medium vulnerability group (57%);
- Electricity switchers (56%) and those who self-disconnected from their electricity supply (40%) were less likely to indicate that they trust their supplier than those who have not switched electricity supplier in the last three years (62%) and who have not self-disconnected (63%).

Table 6.8 Trust in electricity supplier to provide a fair price by disability/illness, vulnerability, electricity switching, and electricity self-disconnection

		Distrust	Neither	Trust	Not sure	*Total*
Overall	All *Base: 1502*	17%	22%	60%	1%	*100%*
Disability/ illness	Yes *Base: 242*	20%	26%	54%	0%	*100%*
	No *Base: 1107*	15%	22%	62%	1%	*100%*
Vulnerability	High/medium vulnerability *Base: 623*	18%	24%	57%	1%	*100%*
	Low vulnerability *Base: 57*	11%	32%	58%	-	*100%*
	Not vulnerable *Base: 822*	17%	20%	63%	1%	*100%*
Electricity switching	Switchers *Base: 517*	21%	23%	56%	-	*100%*
	Non-switchers *Base: 985*	15%	21%	62%	1%	*100%*
Electricity self-disconnection	Yes *Base: 162*	35%	24%	40%	1%	*100%*
	No *Base: 1335*	15%	22%	63%	1%	*100%*

Gas

Levels of trust in gas suppliers were similar to that for electricity suppliers. Under two thirds (65%) of those with gas heating stated that they trust their supplier to treat them fairly in their dealings, compared to 15% who said they would distrust their supplier. This compares to 64% and 19% respectively from the 2023 Tracker. Three in five (61%) confirmed that they trust their supplier to provide a fair price (56% in 2023), with one fifth (21%) reporting that they would not trust their supplier to do this (23% in 2023).

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

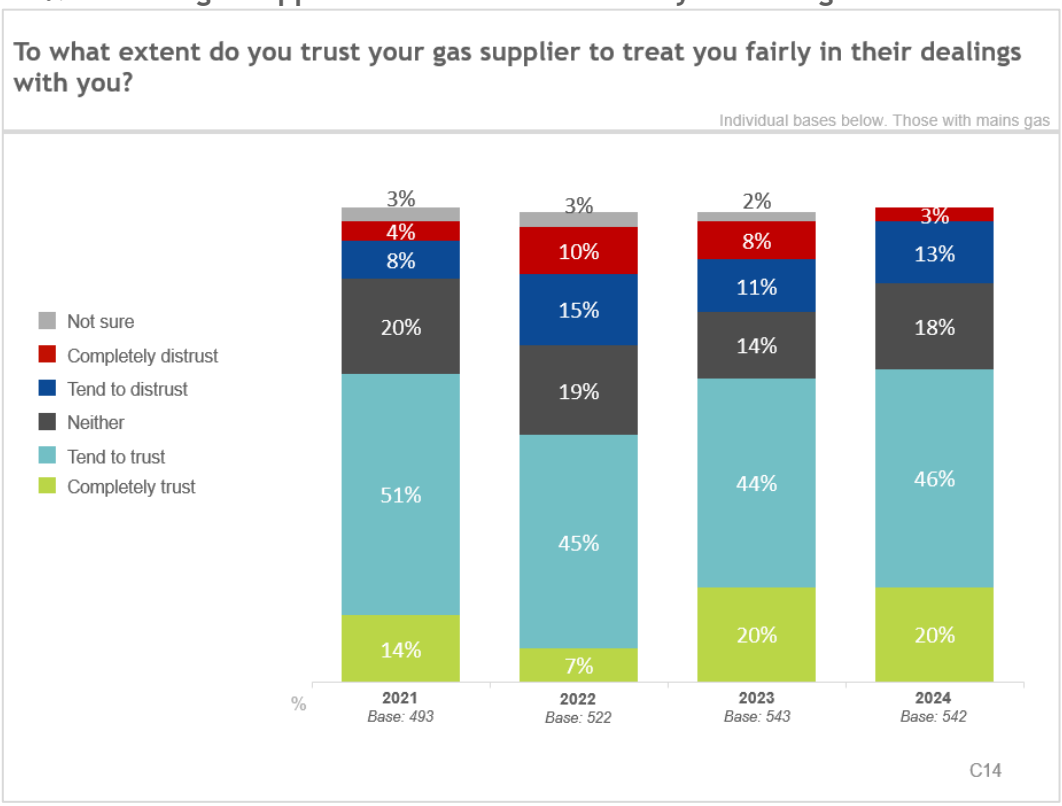
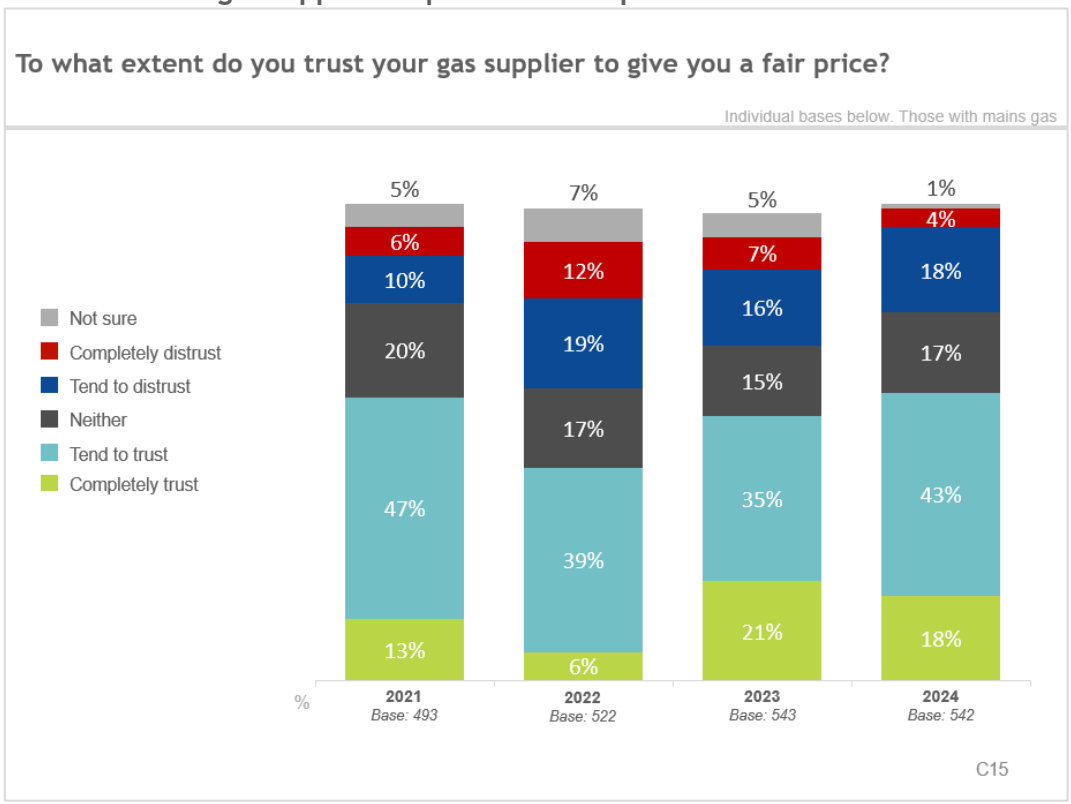


Figure 6.10 Trust in gas supplier to provide a fair price



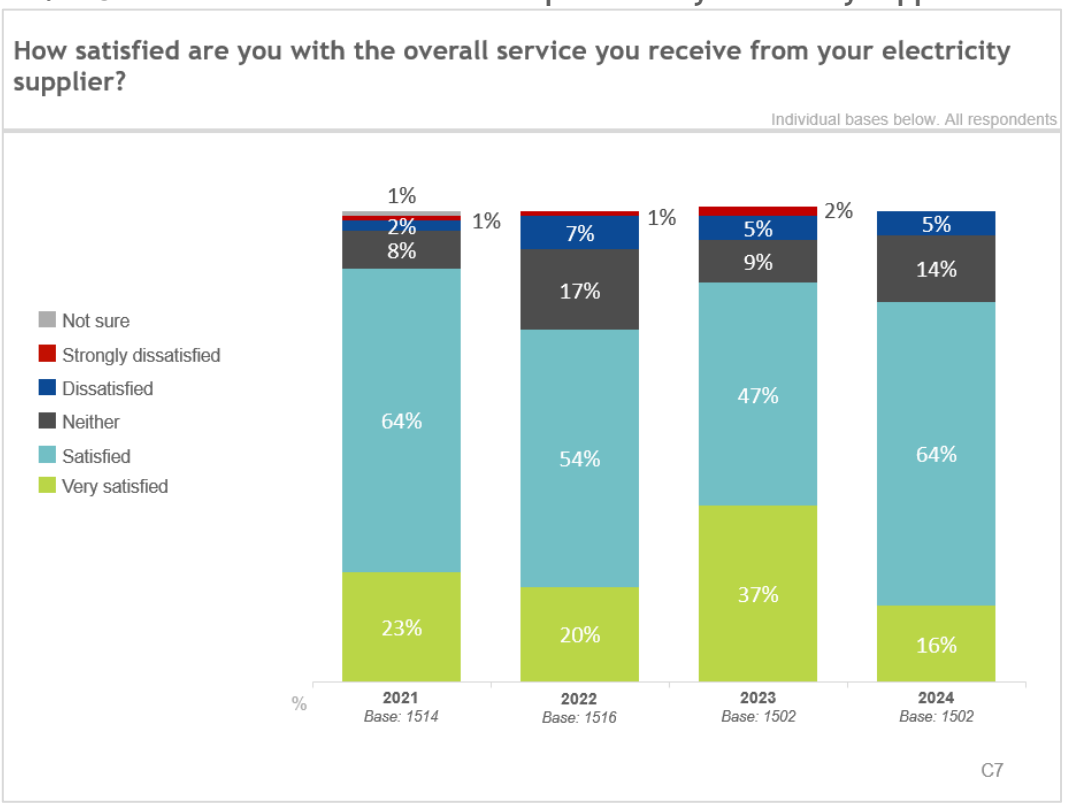
Satisfaction with overall service provided by electricity and gas suppliers

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

Electricity

Four in five (80%) domestic consumers were satisfied or very satisfied with the service they receive from their electricity supplier, with 6% reporting dissatisfaction. This is compared to 84% who reported satisfaction and 7% who reported dissatisfaction in the 2023 Tracker (see Figure 6.11).

Figure 6.11 Satisfaction with overall service provided by electricity supplier



Respondents aged 65 and over (84%) were more likely to say they were satisfied with the overall service than those aged 18 to 34 (77%), while those who had self-disconnected from their electricity supply (69%) were less likely to be satisfied than those who had not self-disconnected (82%) (see Table 6.9).

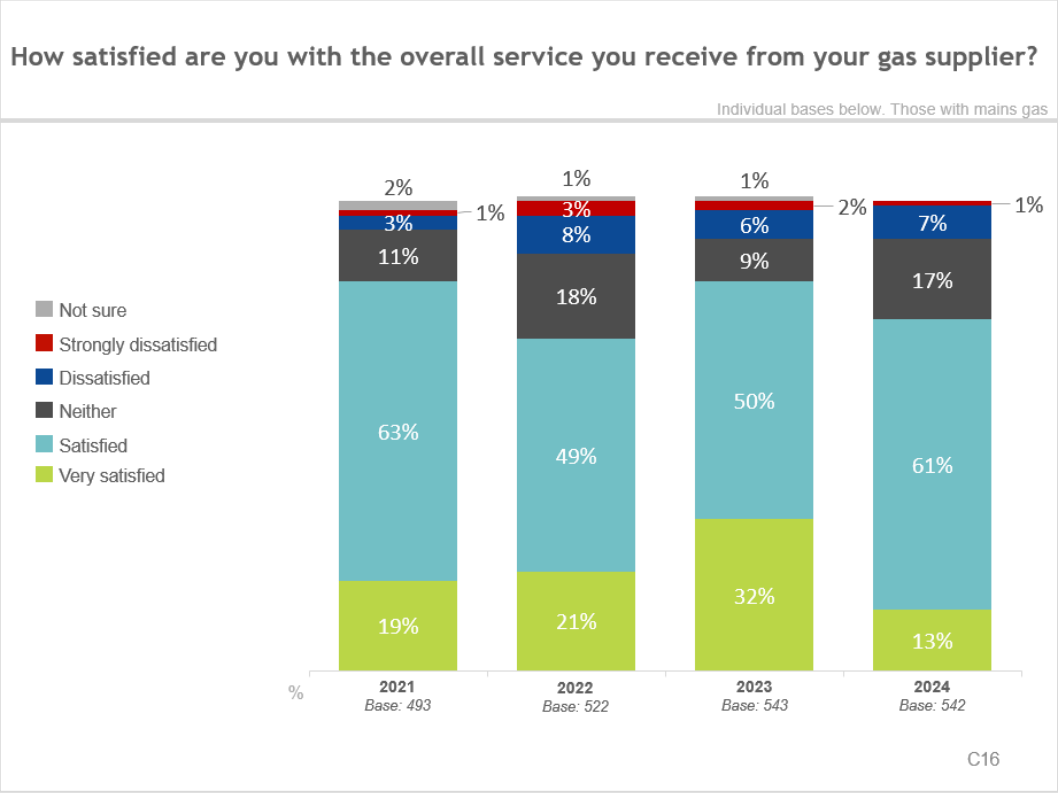
Table 6.9 Satisfaction with overall service provided by electricity supplier by age and electricity self-disconnection

		Dissatisfied	Neither	Satisfied	Not sure	*Total*
Overall	All *Base: 1502*	6%	14%	80%	0%	*100%*
Age	Under 35 *Base:213*	6%	16%	77%	0%	*100%*
	35-44 *Base:271*	6%	15%	79%	0%	*100%*
	45-64 *Base:592*	6%	14%	79%	0%	*100%*
	65 plus *Base: 426*	5%	11%	84%	0%	*100%*
Electricity self-disconnection	Yes *Base: 162*	12%	20%	69%	-	*100%*
	No *Base: 1335*	5%	13%	82%	0%	*100%*

Gas

Overall, gas consumers were also satisfied with the service they receive from their supplier, with 75% saying this, compared to 8% who were dissatisfied. This compares with 82% who were satisfied and 8% who were dissatisfied in the 2023 Tracker (see Figure 6.12).

Figure 6.12 Satisfaction with overall service provided by gas supplier



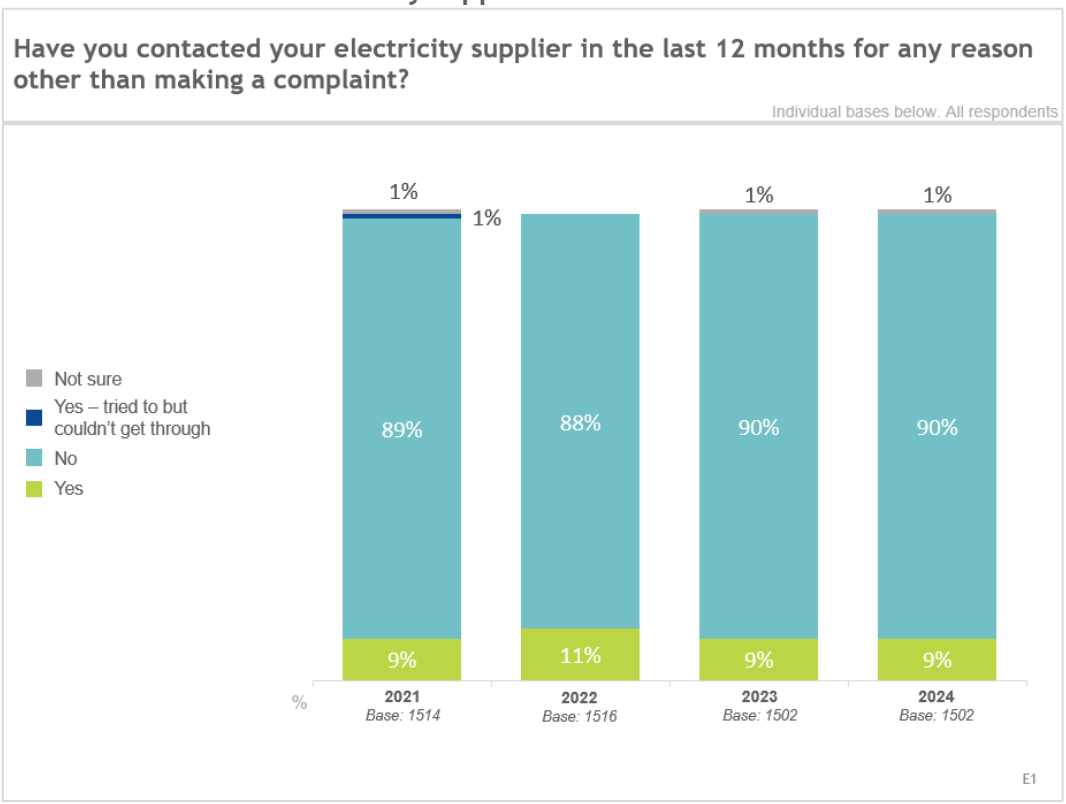
Contact with supplier

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

Electricity

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

Figure 6.13 Contact with electricity supplier in the last 12 months



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

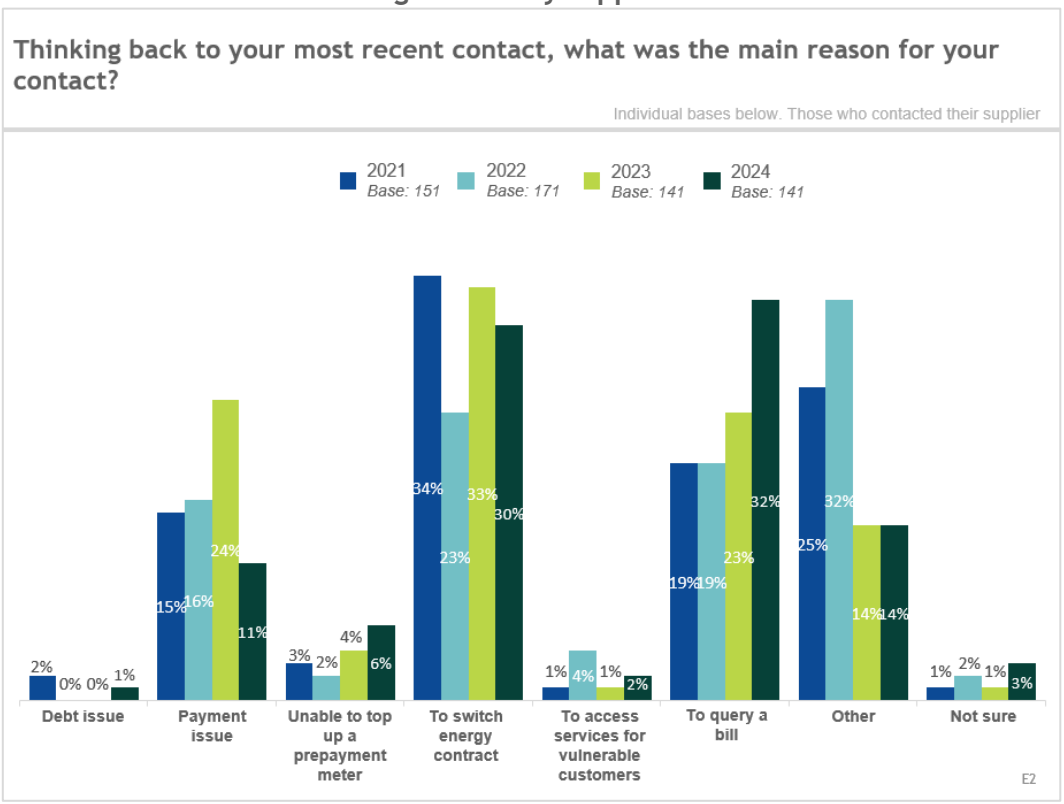
- Respondents aged 18 to 34 (11%) were more likely to have contacted their electricity supplier in the last 12 months than those aged 65 and over (6%);
- Those living in the least deprived areas (13%) were more likely to say they contacted their electricity supplier compared to those living in the most deprived areas (7%);
- Respondents who have switched their electricity supplier in the last three years (15%) were more likely to have been in contact with their supplier than those who have not switched (6%);
- 16% of respondents who self-disconnected from their electricity supply said they had contacted their electricity supplier in the past year, compared to 8% who had not self-disconnected.

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

		Yes	No	Couldn't get through	Not sure	*Total*
Overall	All *Base: 1502*	9%	90%	0%	1%	*100%*
Age	Under 35 *Base:213*	11%	89%	-	-	*100%*
	35-44 *Base:271*	10%	90%	-	0%	*100%*
	45-64 *Base:592*	10%	89%	1%	1%	*100%*
	65 plus *Base: 426*	6%	93%	0%	1%	*100%*
MDM Quintile	1 - Most deprived *Base: 271*	7%	93%	0%	-	*100%*
	2 *Base: 301*	6%	93%	1%	0%	*100%*
	3 *Base: 315*	10%	90%	-	0%	*100%*
	4 *Base: 314*	10%	89%	-	1%	*100%*
	5 - Least deprived *Base: 301*	13%	85%	0%	1%	*100%*
Electricity switching	Switchers *Base: 517*	15%	85%	0%	0%	*100%*
	Non-switchers *Base: 985*	6%	93%	0%	1%	*100%*
Electricity self-disconnection	Yes *Base: 162*	16%	81%	2%	1%	*100%*
	No *Base: 1335*	8%	91%	0%	0%	*100%*

One third (32%) of those who had made contact did so to query a bill, an increase from 23% in 2023. 30% made contact to switch their energy contract, a slight decrease from 33% in 2023. 11% wanted to report a payment issue, down from 24% in 2023. 1% made contact as they were struggling to pay or had a debt issue.

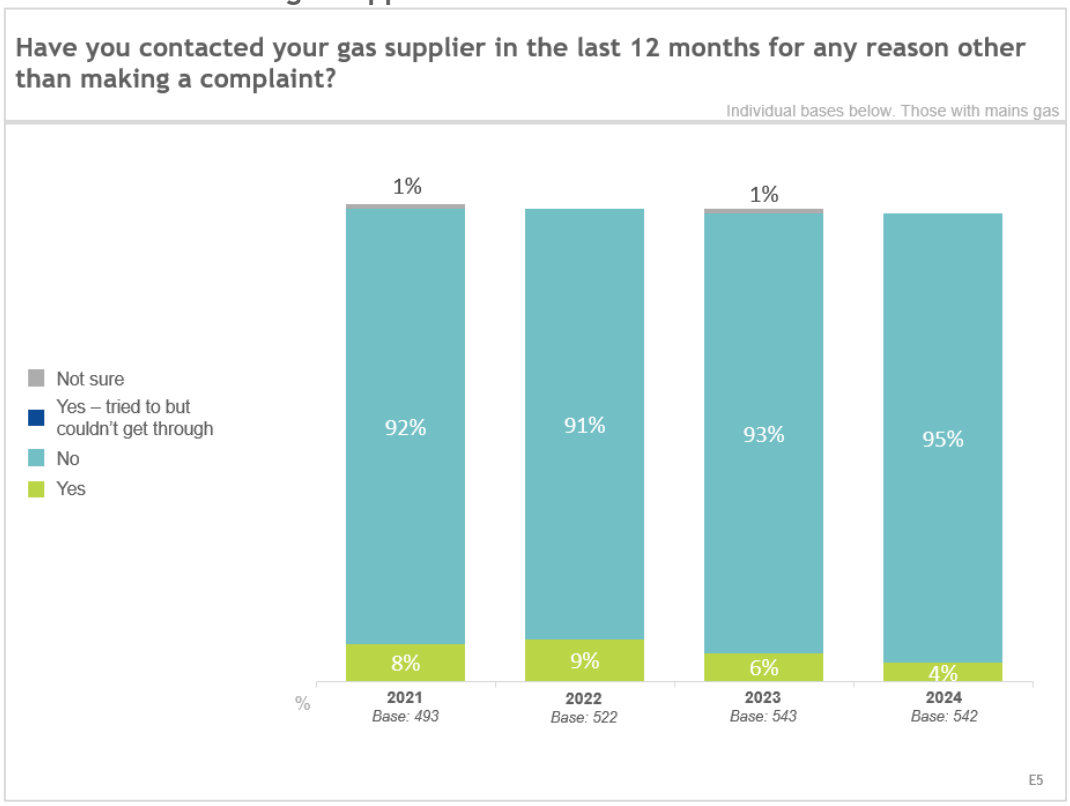
Figure 6.14 Reasons for contacting electricity supplier



Gas

4% of respondents with gas heating contacted their supplier in the last 12 months (see figure 6.15).

Figure 6.15 Contact with gas supplier in last 12 months



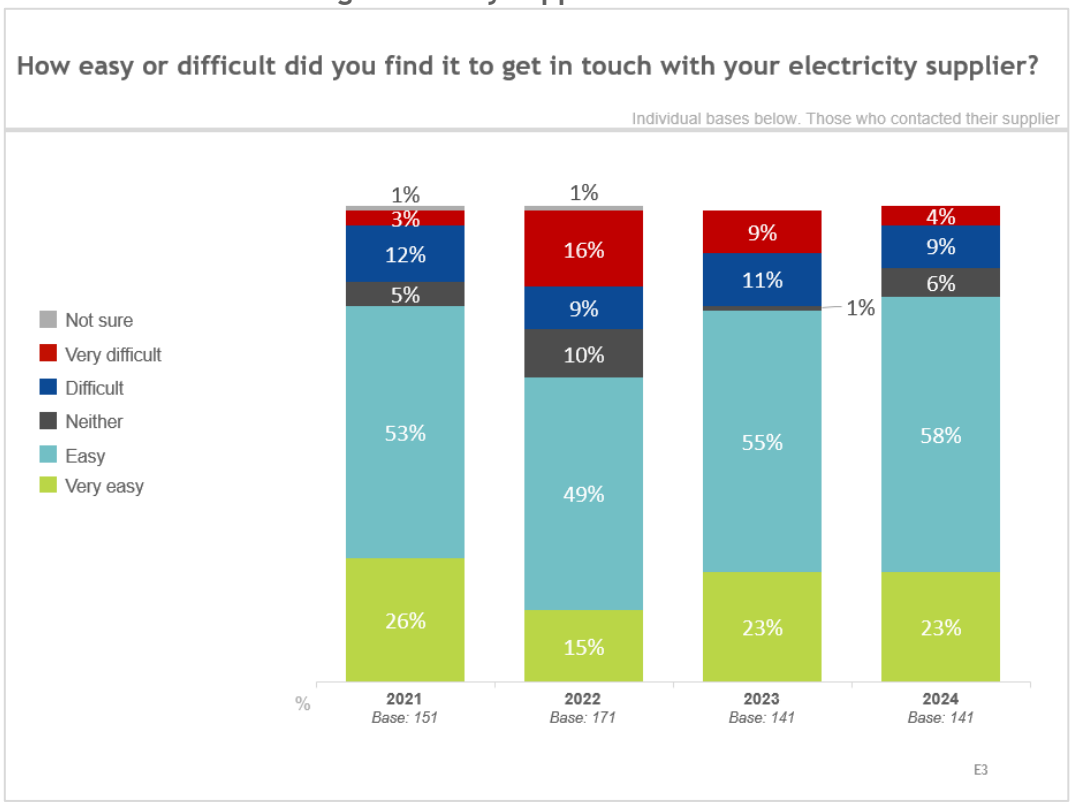
Ease of contacting supplier

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, four in five (82%, *n=115*) found it 'easy' or 'very easy', with 13% (*n=18*) finding it 'difficult' or 'very difficult' (see Figure 6.16).

Figure 6.16 Ease of contacting electricity supplier



Gas

Of the 23 respondents who contacted their gas supplier, 17 thought it was 'easy' or 'very easy' to make contact, while 3 respondents reported it was 'difficult' or 'very difficult'.

Experience of interacting with supplier

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

Electricity

Over three quarters (77%) 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 72% thought their electricity supplier was supportive, 15% disagreed with this. 72% agreed that they were treated fairly and 14% disagreed.

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

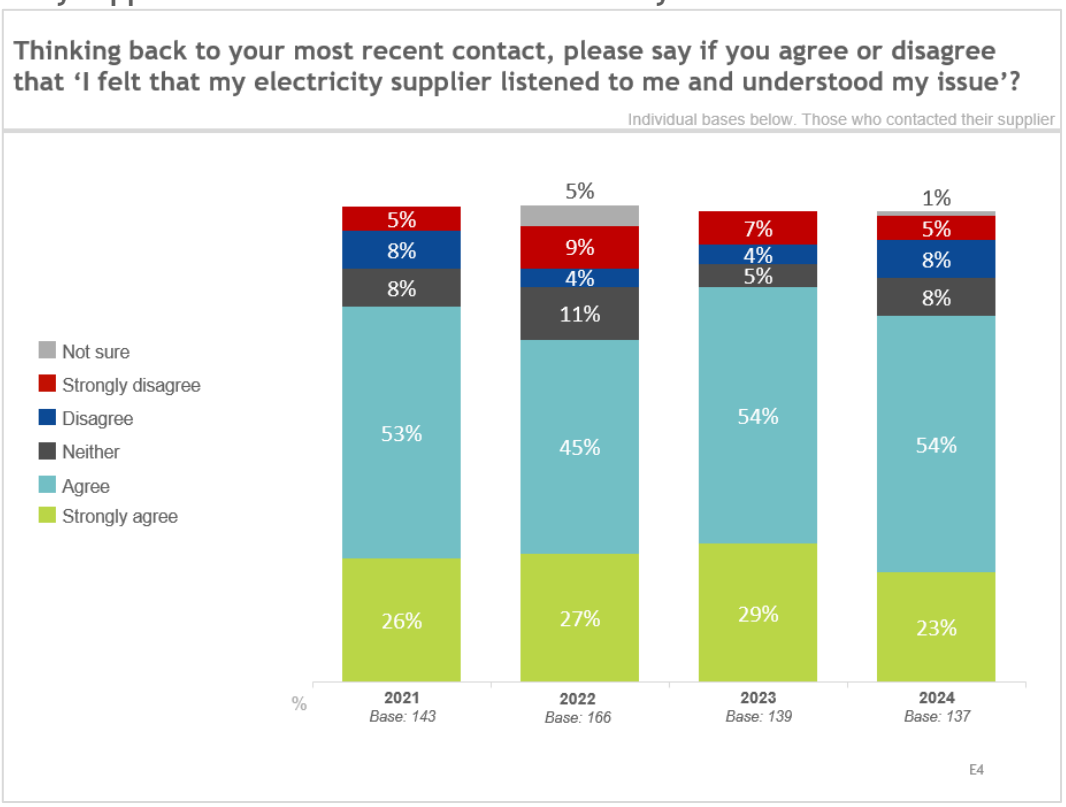


Figure 6.18 Experience of interacting with electricity supplier - my electricity supplier was supportive

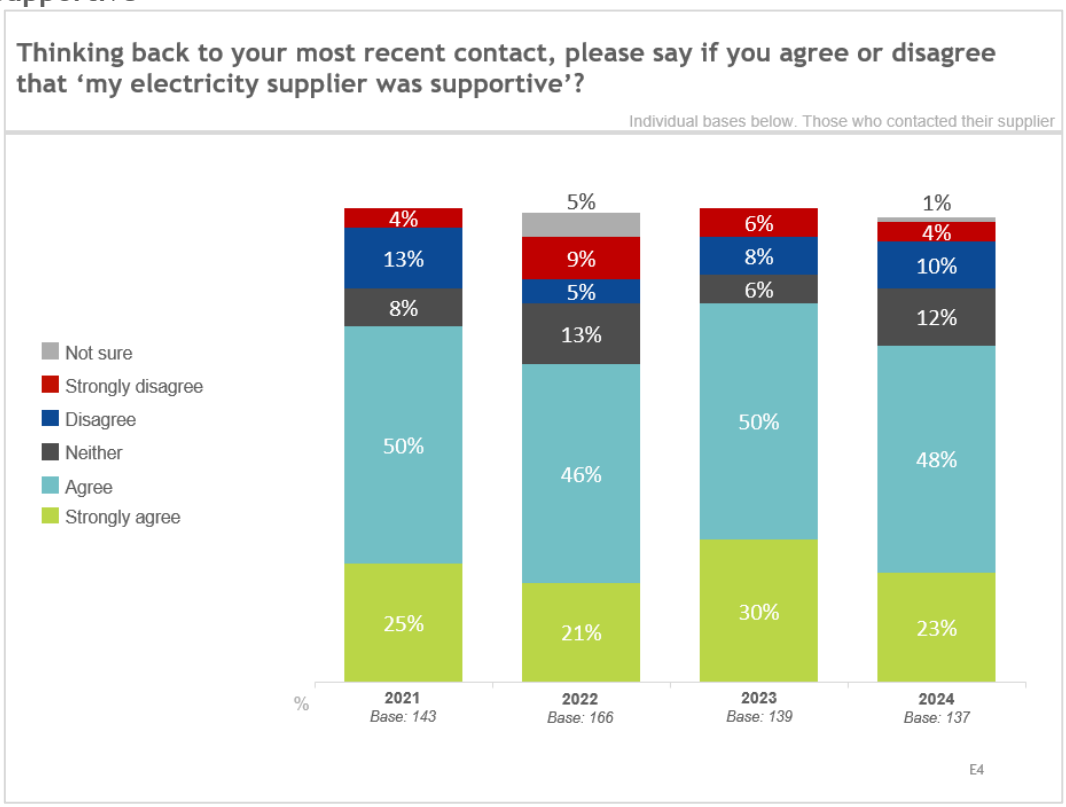
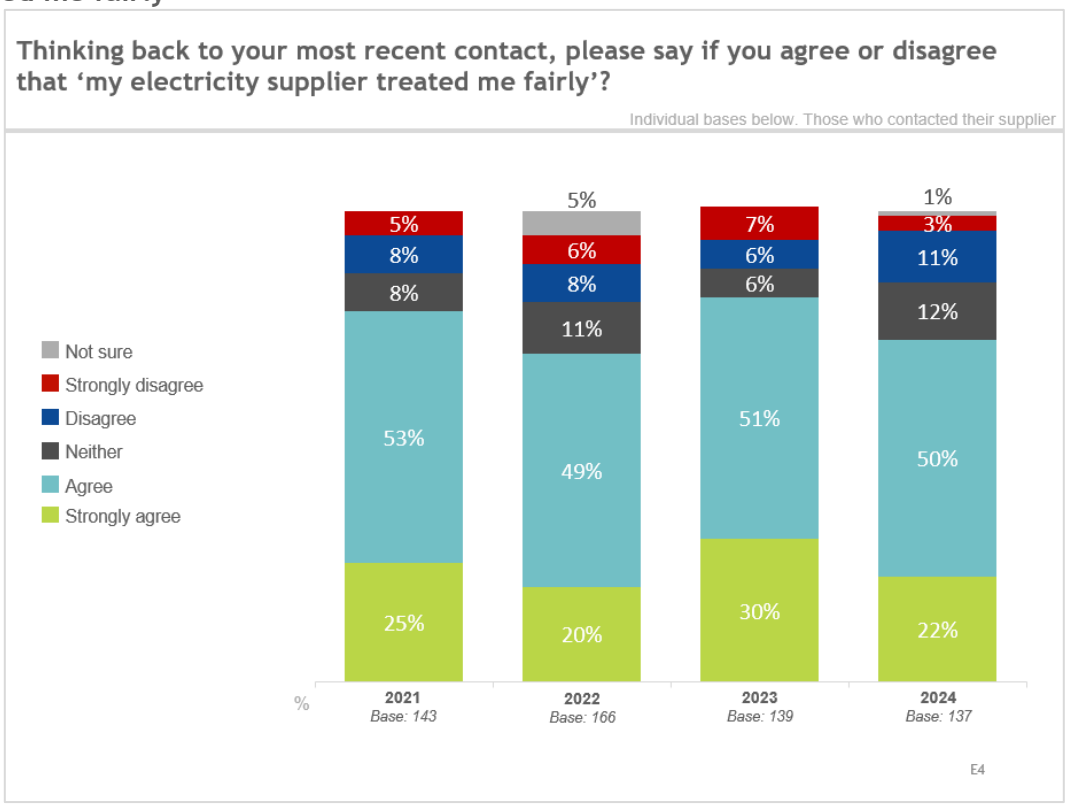


Figure 6.19 Experience of interacting with electricity supplier - my electricity supplier treated me fairly



Gas

18 of the 23 respondents who contacted their gas supplier reported they were listened to and understood when they made contact. 18 agreed that their supplier was supportive, and 20 respondents said they were treated fairly.

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

7.Complaint handling

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

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

Key findings

- 3% of electricity and 6% of gas respondents had made a complaint to their electricity or gas supplier in the past year.
- 3% stated that they had wanted to make a complaint to their electricity supplier and 4% to their gas supplier in the past but left it unreported.

Incidence of making a complaint

3% of electricity and 6% of gas customers reported that they had made a complaint to their electricity supplier in the last 12 months. There were no significant differences between those who have prepayment meters and those who have credit meters for both electricity and gas customers. 5% of electricity switchers had made a complaint to their supplier, compared to 3% who had not switched (see Figure 7.1 and Table 7.1).

Figure 7.1 Incidence of making a complaint to energy supplier

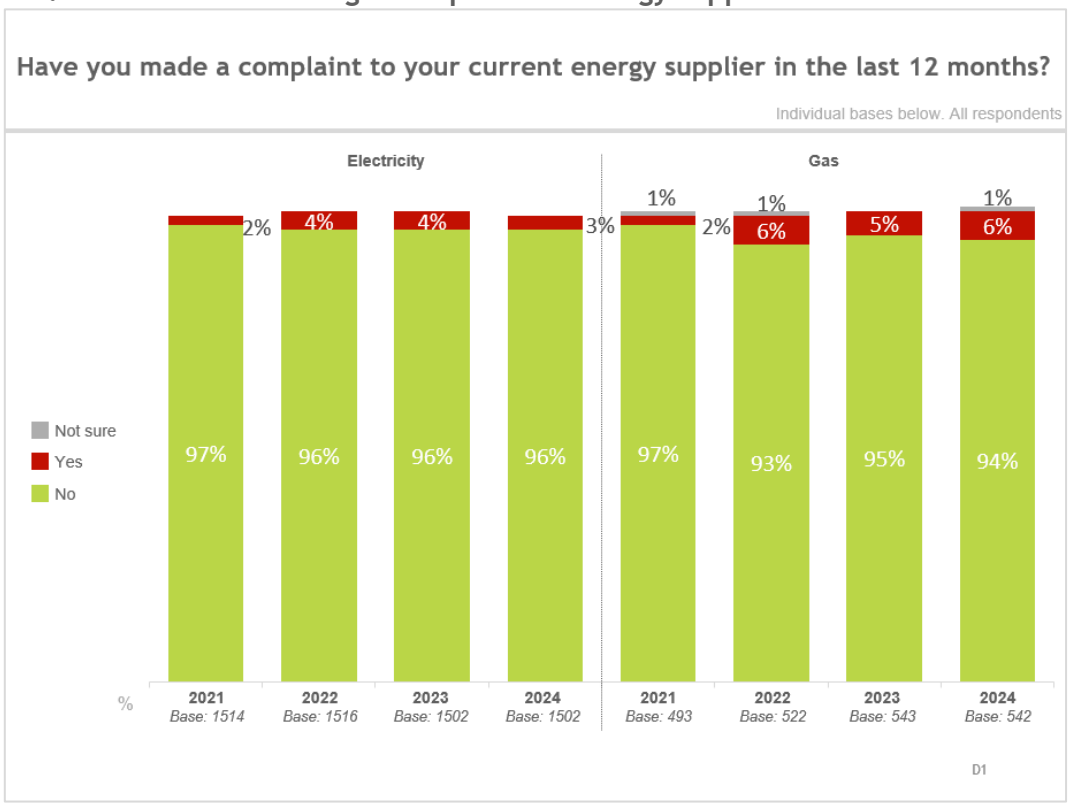


Table 7.1 Incidence of making a complaint to supplier electricity switching

		Yes	No	Not sure	*Total*
Overall	All *Base: 1502*	3%	96%	0%	*100%*
Electricity switching	Switchers *Base: 517*	5%	95%	0%	*100%*
	Non-switchers *Base: 985*	3%	97%	0%	*100%*

Ease of making complaint

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

Electricity

Of 50 electricity customers who made a complaint to their supplier, 29 found it easy to make the complaint, while 15 respondents found it difficult.

Gas

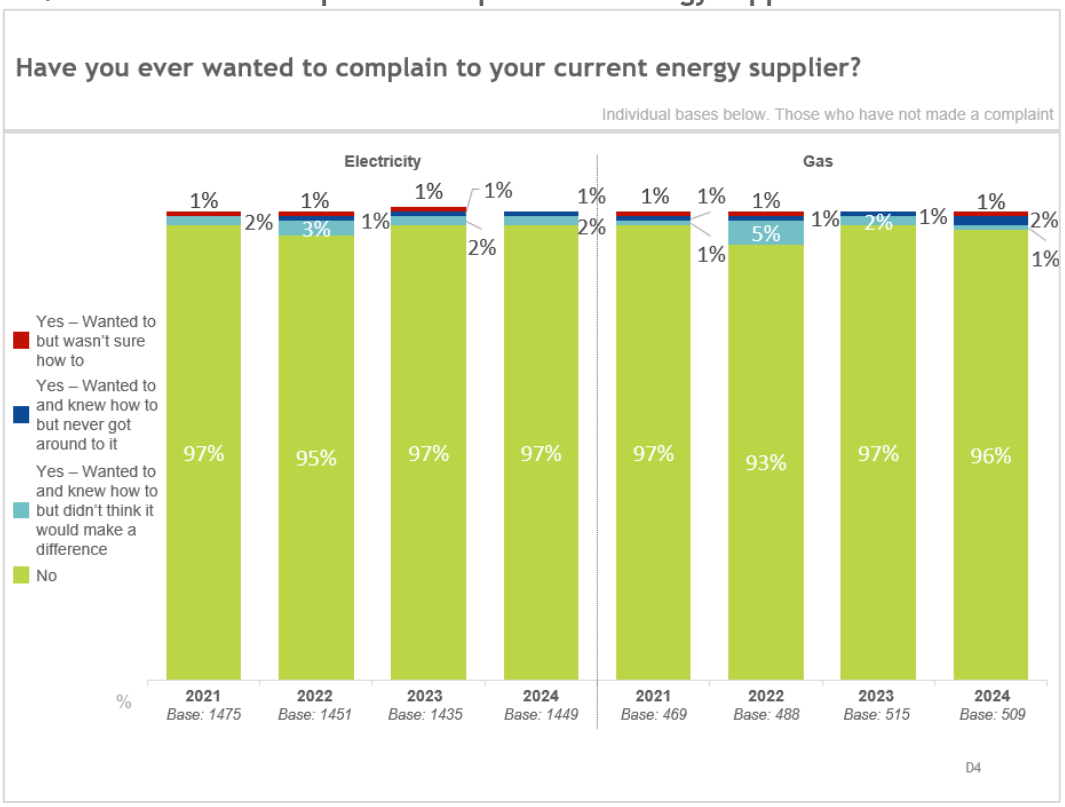
16 of the 30 gas customers who made a complaint to their supplier found the complaint process easy, compared to 12 respondents who found it difficult.

Incidence of unreported complaint

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

The vast majority (97%) stated that they have never wanted to make a complaint to their electricity supplier, 2% had wanted to make a complaint but did not think it would make a difference, and a further 1% wanted to make a complaint but never got around to doing it. Similarly, the vast majority (96%) of gas consumers confirmed that they have never wanted to make a complaint to their supplier. 2% knew how to make a complaint but never got around to it, while 1% said they did not think it would make a difference.

Figure 7.2 Incidence of unreported complaints to energy 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 overall awareness (95% were completely or somewhat aware) of being able to choose between different electricity suppliers amongst respondents:
  - 75% of those consumers agreed that having this choice gives access to better deals (down from 83% in 2023);
  - 46% had compared electricity deals to see if they could switch supplier or tariff. This is a decrease from 53% in the 2023 Tracker; and
  - 36% of those who have the option to switch between gas suppliers said that they had compared gas deals. This is up from 32% in 2023.
- 48% of electricity consumers and 44% of gas customers were confident that they are on the best energy deal for them.
- 47% of domestic consumers have switched their electricity supplier at least once at any time, a decrease from 51% in the 2023 Tracker:
  - Of those who have ever switched, 75% have done so within the last three years (up from 71% in 2023);
  - In contrast, only 11% of those who have the option had switched gas suppliers.
- Respondents aged under 35, who privately rent, and who live in rural areas were among the subgroups who were less likely to have switched their electricity supplier at any time.
- Feeling they were overpaying (46%) and reacting to a promotional offer from another supplier (35%) were the main drivers for switching electricity supplier.
- 40% of electricity consumers who had switched did so through a doorstep seller, up slightly from 38% in 2023.
- 82% reported a positive experience with switching electricity supplier.
- Of those respondents who had never switched electricity supplier, 60% had never switched due to satisfaction with their current service, while 40% thought it would be too much hassle, increasing from 31% in 2023[11].
- Of those respondents who had never switched gas supplier 54% had never switched due to satisfaction with their current service, which is a decrease from 74% in 2023. 28% said it would be too much hassle, increasing from 15% in 2023.

[11] Multiple choice question, therefore respondents could select more than one reason for never switching.

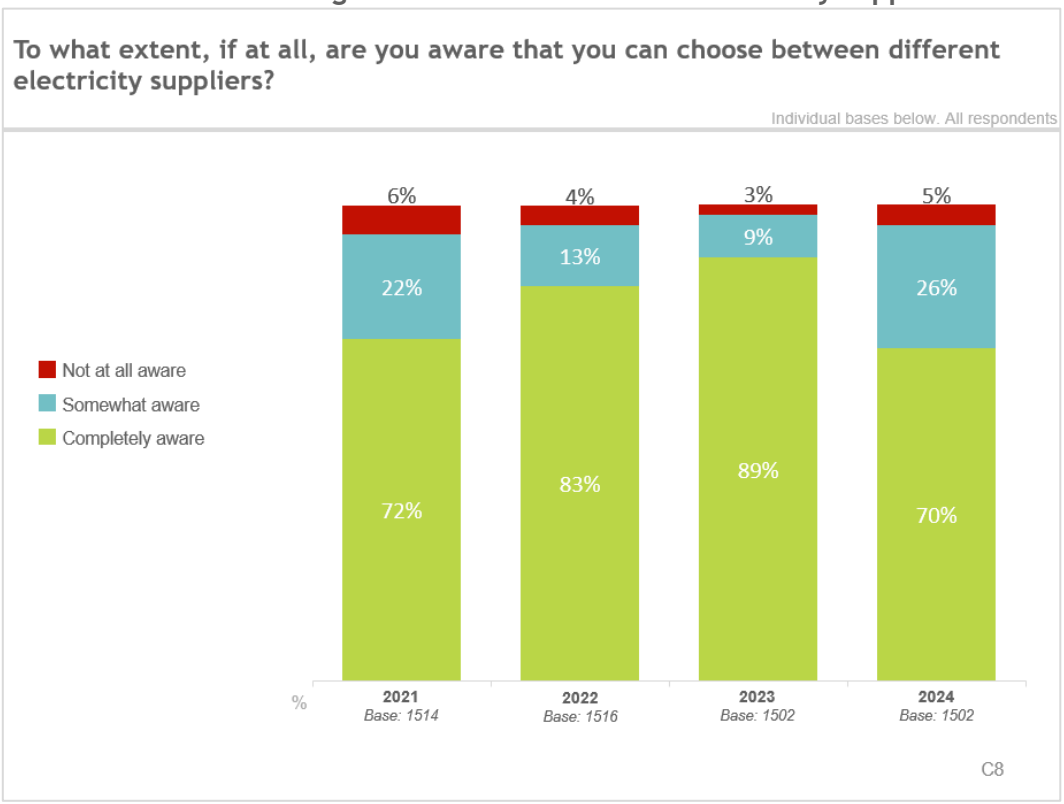
- 16% of electricity and 10% of gas customers said they were likely to switch their supplier in the next 12 months.
- Confidence using the internet appears to influence the likelihood of comparing energy deals and of switching:
  - Almost all (96%) confident internet users were aware they could choose between electricity suppliers;
  - 52% of those who are confident internet users said they had compared electricity deals compared to 27% who are not confident; and
  - Two thirds (65%) of respondents who are not confident internet users said they had never switched electricity supplier, compared to 51% of confident users.

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. [12]

The majority (95%) of domestic consumers were aware that they can choose between different electricity suppliers. However, while there was only a slight increase from the 2023 Tracker in those who stated they were not aware (3% in 2023 to 5%), the proportion of respondents who said they were completely aware decreased from 89% to 70% (see Figure 8.1).

Figure 8.1 Awareness of being able to choose between electricity suppliers



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

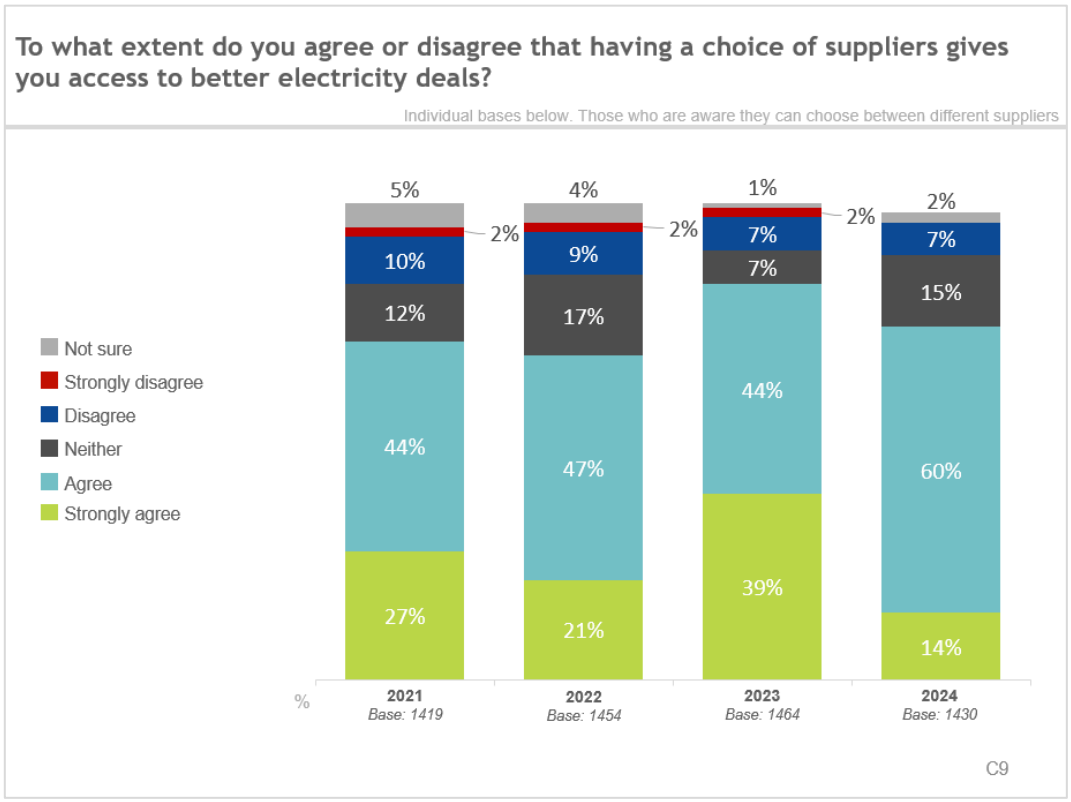
Respondents aged 18 to 34 (91%) were less likely than all other age groups to say they were aware that they can choose between electricity suppliers, while those in the C2DE group (93%) were less likely to be aware than those in the ABC1 group (97%). 90% of respondents who privately rent said they were aware, compared to 97% who own their home. Respondents who consider themselves confident internet users (96%) were more likely to say they were aware than those who are not confident users (91%). Almost all (98%) electricity switchers stated that they were aware, compared to 94% of non-switchers (see Table 8.1).

Table 8.1 Awareness of being able to choose between electricity suppliers by demographics, tenure, confidence using the internet, and electricity switching

		Completely aware	Somewhat aware	Not at all aware	*Total*
Overall	All *Base: 1502*	70%	26%	5%	*100%*
Age	Under 35 *Base:213*	65%	25%	9%	*100%*
	35-44 *Base:271*	77%	19%	4%	*100%*
	45-64 *Base:592*	70%	27%	3%	*100%*
	65 plus *Base: 426*	67%	28%	5%	*100%*
SEG	ABC1 *Base: 731*	76%	21%	3%	*100%*
	C2DE *Base: 733*	64%	30%	7%	*100%*
Tenure	Owner occupied *Base: 1148*	70%	26%	3%	*100%*
	Private rented *Base: 174*	67%	23%	10%	*100%*
	Social rented *Base: 161*	70%	23%	7%	*100%*
Confidence using internet	Not confident *Base: 237*	54%	37%	9%	*100%*
	Neither *Base: 256*	58%	38%	4%	*100%*
	Confident *Base: 1009*	76%	20%	4%	*100%*
Electricity switching	Switchers *Base: 517*	79%	18%	2%	*100%*
	Non-switchers *Base: 985*	64%	29%	6%	*100%*

75% of those who were aware that they can choose between suppliers agreed having a choice gives them access to better deals, compared to 8% who did not agree. While the proportion of respondents who agree decreased from 83% in the 2023 Tracker, there was only a slight decrease in those who disagree (9%), with the proportion who neither agreed nor disagreed increasing from 7% to 15% (see Figure 8.2).

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



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

- Although there were no significant differences between those who agreed that having a choice of supplier gives them access to better deals, respondents who would be considered to be in the high or medium vulnerability group (10%) were more likely to disagree when compared with respondents who are not vulnerable (6%);
- Those who are not confident internet users (64%) were less likely to agree than those who consider themselves to be confident users (79%);
- Electricity switchers (82%) were more likely to agree that having a choice between electricity suppliers gives access to better deals than those who have not switched supplier in the last three years (71%).

Table 8.2 Level of agreement that being able to choose between electricity suppliers gives access to better deals by vulnerability, confidence using the internet, and electricity switching

		Disagree	Neither	Agree	Not sure	*Total*
Overall	All *Base: 1430*	8%	15%	75%	2%	*100%*
Vulnerability	High/medium vulnerability *Base: 599*	10%	15%	73%	2%	*100%*
	Low vulnerability *Base: 57*	5%	18%	75%	2%	*100%*
	Not vulnerable *Base: 774*	6%	16%	76%	2%	*100%*
Confidence using internet	Not confident *Base: 215*	12%	21%	64%	2%	*100%*
	Neither *Base: 247*	9%	21%	67%	3%	*100%*
	Confident *Base: 968*	6%	13%	79%	2%	*100%*
Electricity switching	Switchers *Base: 506*	7%	10%	82%	1%	*100%*
	Non-switchers *Base: 924*	8%	19%	71%	3%	*100%*

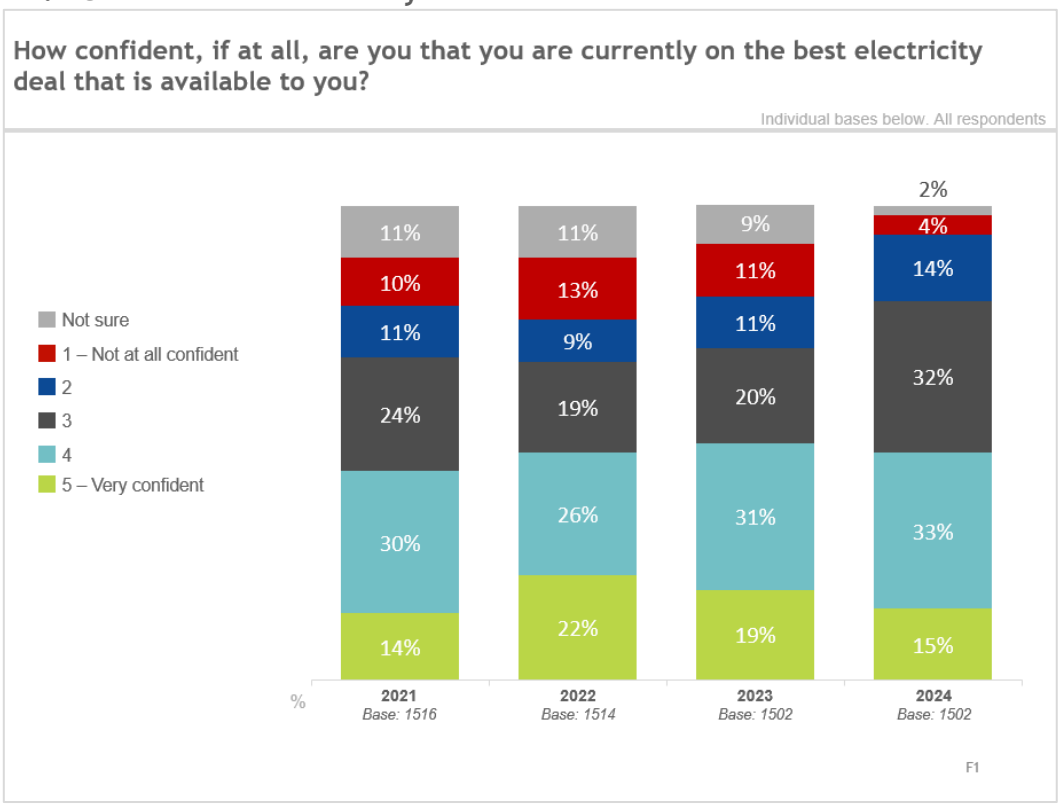
Confidence in current energy deal

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

Under half (48%) of domestic consumers provided a rating of '4' or '5', including 15% who said they were 'very confident' that they were on the best electricity deal. One third (32%, up from 20% in 2023) gave a rating of '3', while 18% were not confident in their current electricity deal (rating '1' or '2') (see Figure 8.3).

Figure 8.3 Confidence in electricity deal



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

- 13% of respondents aged 65 and over stated that they were not confident that they were on the best electricity deal, compared to 19% aged 18 to 34, 19% aged 35 to 44, and 21% aged 45 to 64;
- Those living in urban areas (51%) were more likely to say they were confident than rural respondents (43%);
- Respondents living in the least deprived areas (53%) were less likely to report that they were confident than those in the most deprived areas (45%);
- Electricity switchers (57%) were more likely to be confident they were on the best deal than non-switchers (43%);
- Half (49%) of those who had not self-disconnected from their electricity supply said they were confident, compared to two in five (40%) who had self-disconnected.

Table 8.3 Confidence in electricity deal by age, location, deprivation, electricity switching, and electricity self-disconnection

		Not confident (1,2)	Neither (3)	Confident (4,5)	Don't know	*Total*
Overall	All *Base: 1502*	18%	32%	48%	2%	*100%*
Age	Under 35 *Base:213*	19%	31%	49%	0%	*100%*
	35-44 *Base:271*	19%	33%	45%	3%	*100%*
	45-64 *Base:592*	21%	32%	45%	2%	*100%*
	65 plus *Base: 426*	13%	32%	53%	2%	*100%*
Location	Urban *Base: 929*	16%	31%	51%	2%	*100%*
	Rural *Base: 573*	21%	34%	43%	2%	*100%*
MDM Quintile	1 - Most deprived *Base: 271*	13%	33%	53%	1%	*100%*
	2 *Base: 301*	16%	31%	50%	3%	*100%*
	3 *Base: 315*	19%	33%	45%	3%	*100%*
	4 *Base: 314*	19%	31%	48%	2%	*100%*
	5 - Least deprived *Base: 301*	21%	34%	45%	1%	*100%*
Electricity switching	Switchers *Base: 517*	15%	27%	57%	1%	*100%*
	Non-switchers *Base: 985*	19%	35%	43%	2%	*100%*
Electricity self-disconnection	Yes *Base: 162*	19%	40%	40%	1%	*100%*
	No *Base: 1335*	18%	31%	49%	2%	*100%*

Gas

Respondents with gas heating were slightly less likely to be confident that they were on the best deal compared to electricity consumers. 44% said that they were confident with the deal they were on (rating '4' or '5'), while 24% 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 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

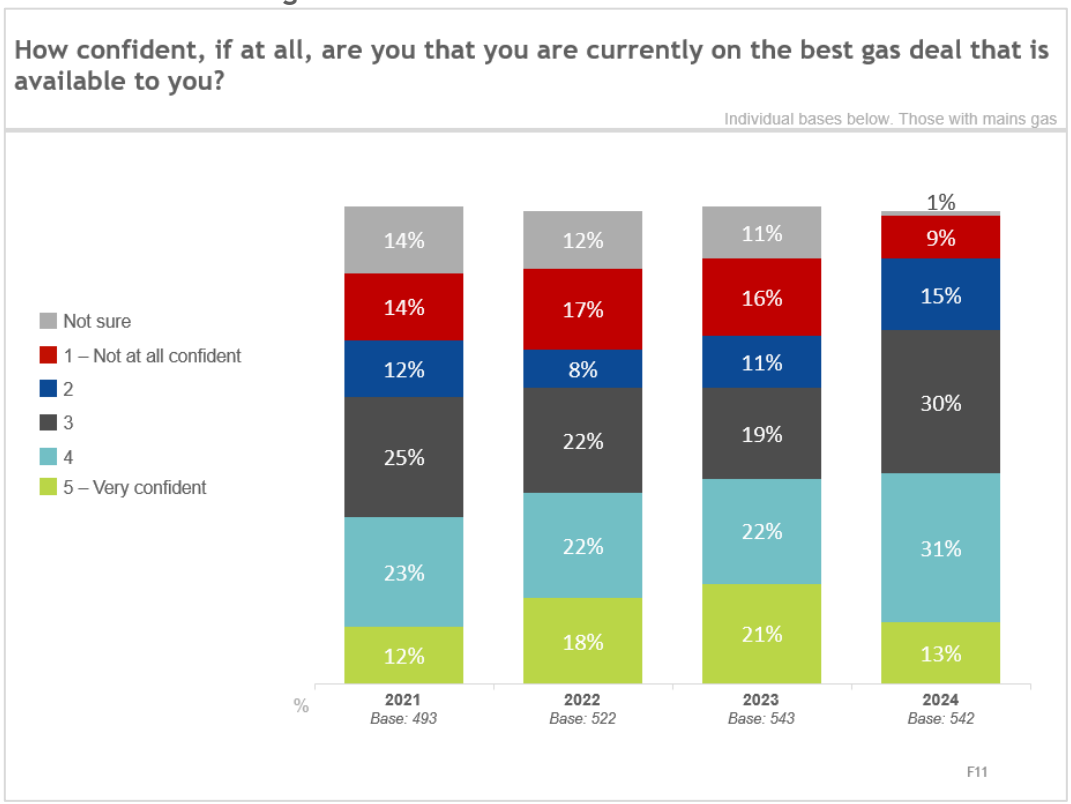


Table 8.4 Confidence in gas deal by payment method and switching behaviour

		Not confident (1,2)	Neither (3)	Confident (4,5)	Not sure	*Total*
Overall	All *Base: 542*	24%	30%	44%	1%	*100%*
Gas payment method	Prepayment meter *Base: 294*	24%	28%	46%	2%	*100%*
	Credit meter *Base: 248*	24%	32%	43%	1%	*100%*
Gas switching	Switchers *Base: 37*	14%	27%	57%	3%	*100%*
	Non-switchers *Base: 505*	25%	30%	43%	1%	*100%*

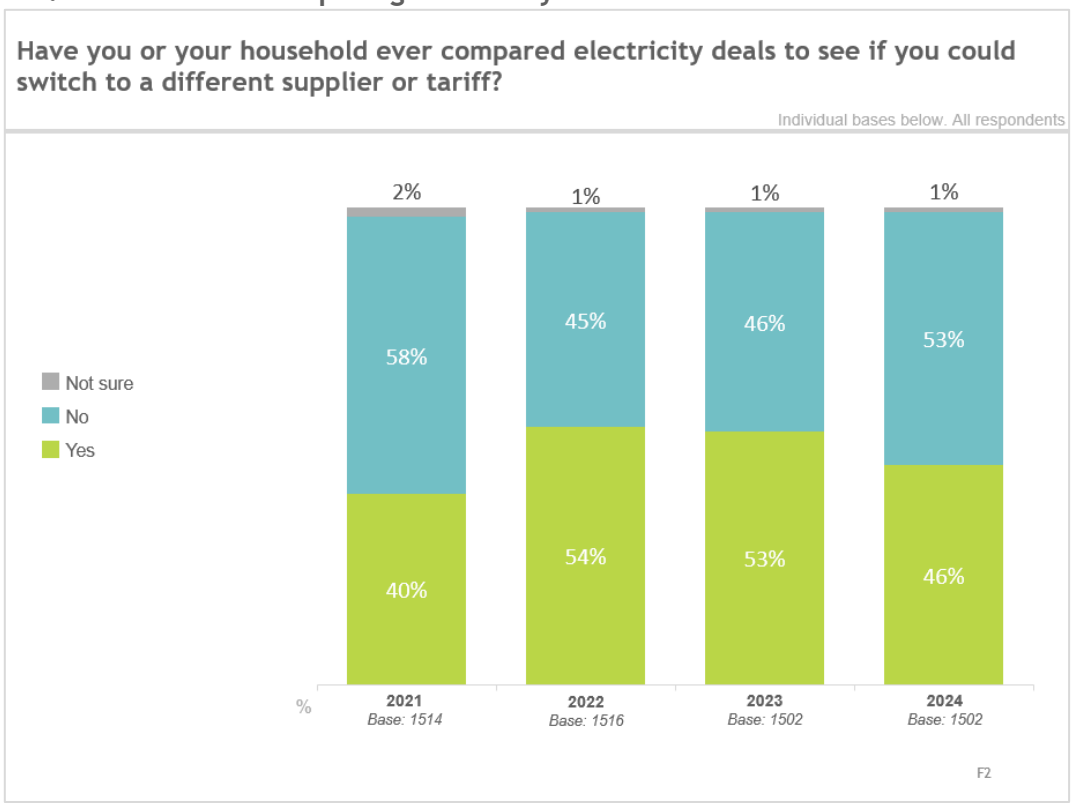
Comparing energy deals

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

46% of domestic consumers had compared their electricity deal, decreasing from 53% in 2023. There were no significant differences between those with a prepayment meter and those with a credit meter when it comes to comparing electricity deals (see Figure 8.5).

Figure 8.5 Incidence of comparing electricity deal



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

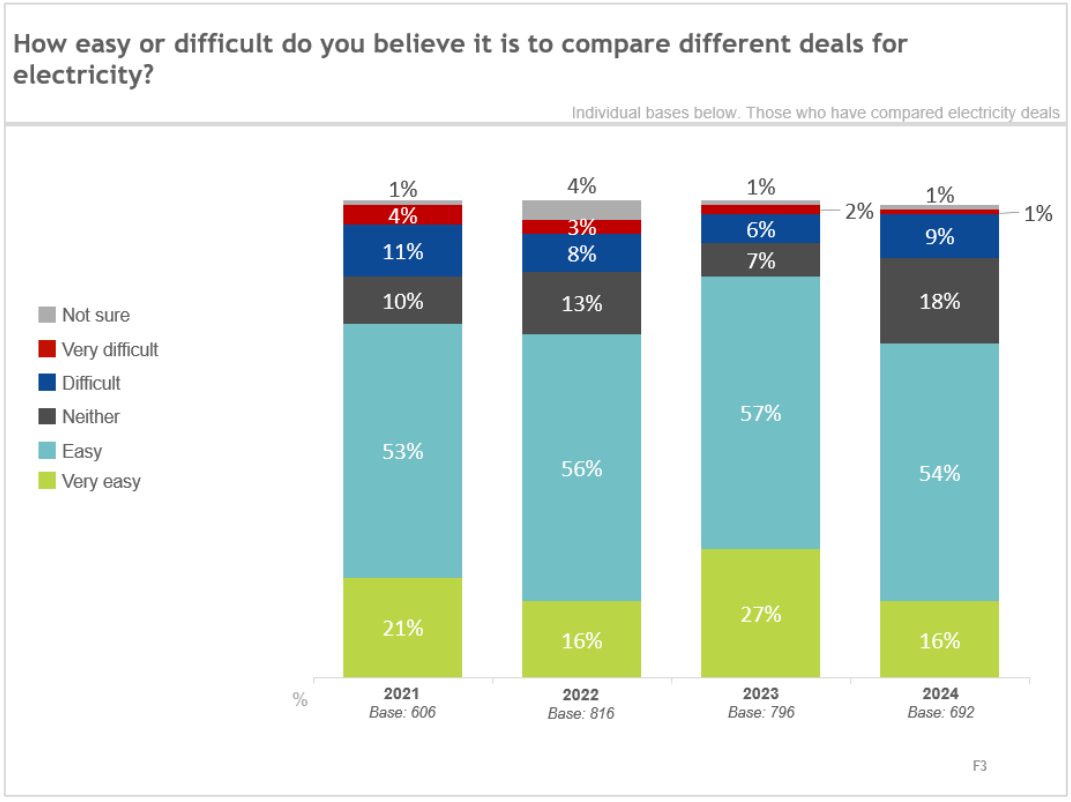
- 52% of respondents in the ABC1 group reported that they had compared their electricity deal, compared to 41% in the C2DE group;
- Respondents who own their home (47%) were more likely to confirm that they had compared electricity deals than those who privately rent (38%);
- Respondents living in urban areas (50%) were more likely to have compared their electricity deal than those living in rural areas (40%);
- Those who have children in their household (59%) were more likely to have compared their deal than those without children (40%);
- Respondents who consider themselves to be confident internet users (52%) were more likely to report comparing their electricity deal than those who do not consider themselves to be confident internet users (27%); and
- Under four in five (78%) electricity switchers had compared electricity deals, compared to 29% who had not switched in the past three years.

Table 8.5 Incidence of comparing electricity deal by SEG, tenure, location, children, confidence using the internet, electricity payment method and electricity switching

		Yes	No	Not sure	*Total*
Overall	All *Base: 1502*	46%	53%	1%	*100%*
SEG	ABC1 *Base: 731*	52%	47%	1%	*100%*
	C2DE *Base: 733*	41%	58%	1%	*100%*
Tenure	Owner occupied *Base: 1148*	47%	52%	1%	*100%*
	Private rented *Base: 174*	38%	60%	2%	*100%*
	Social rented *Base: 161*	46%	53%	1%	*100%*
Location	Urban *Base: 929*	50%	49%	1%	*100%*
	Rural *Base: 573*	40%	60%	1%	*100%*
Children	Yes *Base: 449*	59%	41%	0%	*100%*
	No *Base: 1027*	40%	59%	1%	*100%*
Confidence using internet	Not confident *Base: 237*	27%	71%	2%	*100%*
	Neither *Base: 256*	39%	60%	0%	*100%*
	Confident *Base: 1009*	52%	47%	1%	*100%*
Electricity payment method	Prepayment meter *Base: 593*	45%	54%	1%	*100%*
	Credit meter *Base: 909*	47%	52%	1%	*100%*
Electricity switching	Switchers *Base: 517*	78%	21%	0%	*100%*
	Non-switchers *Base: 985*	29%	69%	1%	*100%*

71% of those who had compared their deal found this ‘easy’ or ‘very easy’ to do, compared to 10% who said this was ‘difficult’ or ‘very difficult’ for them. This compares to 84% who found it easy and 8% who said it was difficult in 2023. It should also be noted that respondents who said comparing deals was neither easy nor difficult increased from 7% in 2023 to 18% (see Figure 8.6).

Figure 8.6 Ease of comparing electricity deal



Several subgroups were more likely to find it easy to compare electricity deals (see Table 8.6):

- Respondents aged 18 to 34 (81%) were more likely to say it was easy to compare electricity deals than those aged 45 to 64 (70%) and those aged 65 and over (64%);
- Three quarters (74%) of those who do not have someone in their household with a disability or illness stated it was easy to compare electricity deals, compared to three in five (59%) of those who do have someone with a disability or illness in their household;
- Those who have children living in their household (76%) were more likely to find comparing deals easy in comparison with those without children (68%);
- Those who consider themselves to be confident internet users (75%) were more likely to say it is easy when compared with those who are not confident users (52%);
- Three quarters (74%) of electricity switchers stated that comparing deals was easy, compared to two thirds (66%) of non-switchers.

Table 8.6 Ease of comparing electricity deal by age, disability/illness, children, confidence using the internet, and electricity switching

		Difficult	Neither	Easy	Not sure	*Total*
Overall	All *Base: 692*	10%	18%	71%	1%	*100%*
Age	Under 35 *Base: 94*	7%	10%	81%	2%	*100%*
	35-44 *Base: 152*	7%	17%	74%	2%	*100%*
	45-64 *Base: 282*	11%	20%	70%	0%	*100%*
	65 plus *Base: 164*	12%	23%	64%	1%	*100%*
Disability/ illness	Yes *Base: 110*	13%	27%	59%	1%	*100%*
	No *Base: 508*	9%	16%	74%	1%	*100%*
Children	Yes *Base: 263*	6%	16%	76%	2%	*100%*
	No *Base: 412*	11%	20%	68%	1%	*100%*
Confidence using internet	Not confident *Base: 64*	14%	33%	52%	2%	*100%*
	Neither *Base: 101*	13%	25%	60%	2%	*100%*
	Confident *Base: 527*	8%	16%	75%	1%	*100%*
Electricity switching	Switchers *Base: 405*	9%	16%	74%	1%	*100%*
	Non-switchers *Base: 287*	10%	22%	66%	1%	*100%*

Gas

37% of respondents with gas heating stated that they had the option to switch between gas suppliers in their area, with 44% saying they do not have this option. It should also be noted that one fifth (19%) were unsure whether they could switch their supplier.

Analysis of respondent's postcodes revealed that 67% of those with gas live in an area which would allow them a choice of supplier. Over one third (36%) of those who did not think they had a choice of supplier actually did have a choice, while 21% of those who thought they could choose between gas suppliers are unable to switch.

Figure 8.7 Ability to switch gas supplier

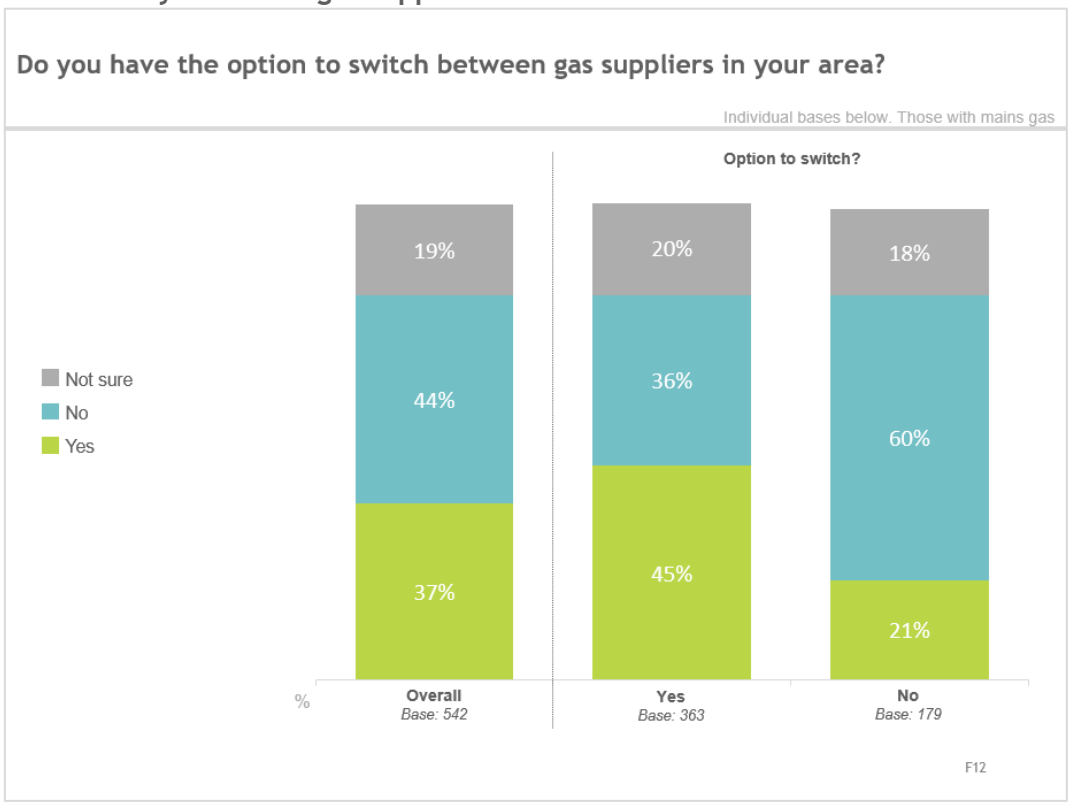
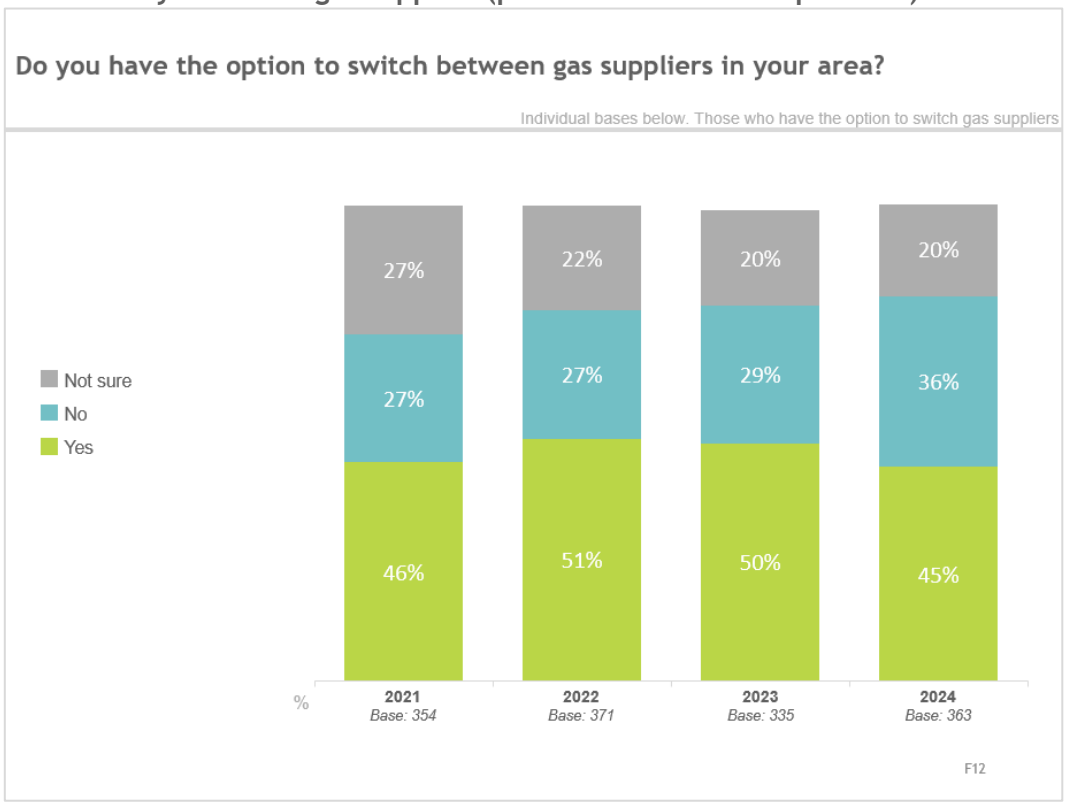


Figure 8.8 Ability to switch gas supplier (previous Tracker comparisons)



Over one third (36%) of those who believe they have the option to switch gas supplier reported that they have compared their current gas deal to see if they could switch. This compares to 32% of respondents in 2023 who said they had done this (see Figure 8.8).

Gas customers who had switched their supplier in the last three years (*n=29*) were more likely than non-switchers (*n=171*) to have compared deals (90% versus 26%) (see Table 8.7).

Figure 8.9 Incidence of comparing gas deal

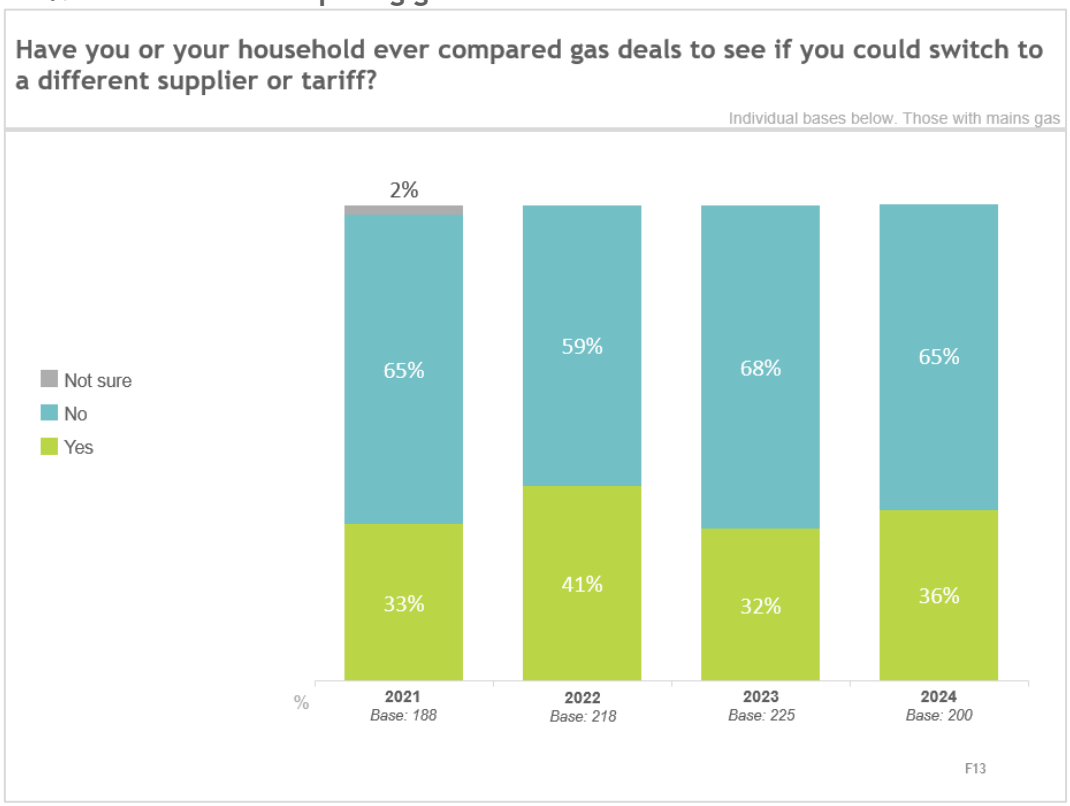


Table 8.7 Incidence of comparing gas deal by switching

		Yes	No	*Total*
Overall	All *Base: 200*	36%	65%	*100%*
Gas switching	Switchers *Base: 29*	90%	10%	*100%*
	Non-switchers *Base: 171*	26%	74%	*100%*

Of those who had compared their gas deal (*n=71)*, the majority (69%, *n=49*) said that this was easy to do, whereas 10% (*n=7)* found it difficult.

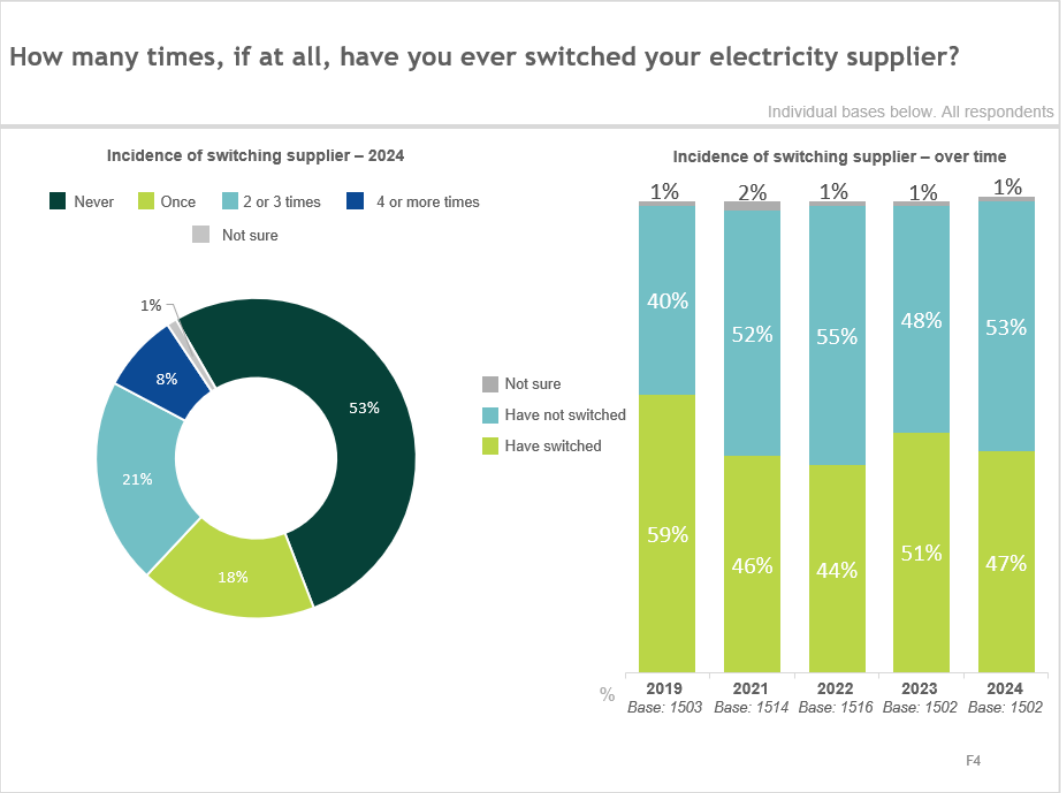
Incidence of switching supplier

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

Electricity

Over half (53%) of electricity customers reported that they have never switched their supplier. 18% said that they had switched once, and a further 21% had switched two or three times. 8% of respondents had switched at least four times (see Figure 8.10).

Figure 8.10 Incidence of switching electricity supplier



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

- Respondents aged 18 to 34 (36%) and 65 and over (40%) were less likely to have switched their electricity supplier at least once when compared with those aged 35 to 44 (54%) and 45 to 64 (50%);
- Those who own their home (46%) and who live in social housing (55%) were more likely to have switched at least once compared to those who privately rent (38%);
- 39% of respondents living in rural areas reported switching their electricity supplier at least once, which was significantly lower when compared to 51% of those in urban areas;
- Respondents who have children (57%) were more likely to have switched their electricity supplier at least once than those who do not have children in their household (41%);
- 43% of respondents who are not considered vulnerable reported that they had switched supplier at least once, compared to 49% in the high or medium vulnerability group;
- Respondents who do not consider themselves as confident internet users (33%) were less likely to have switched at least once than those who are confident users (48%);

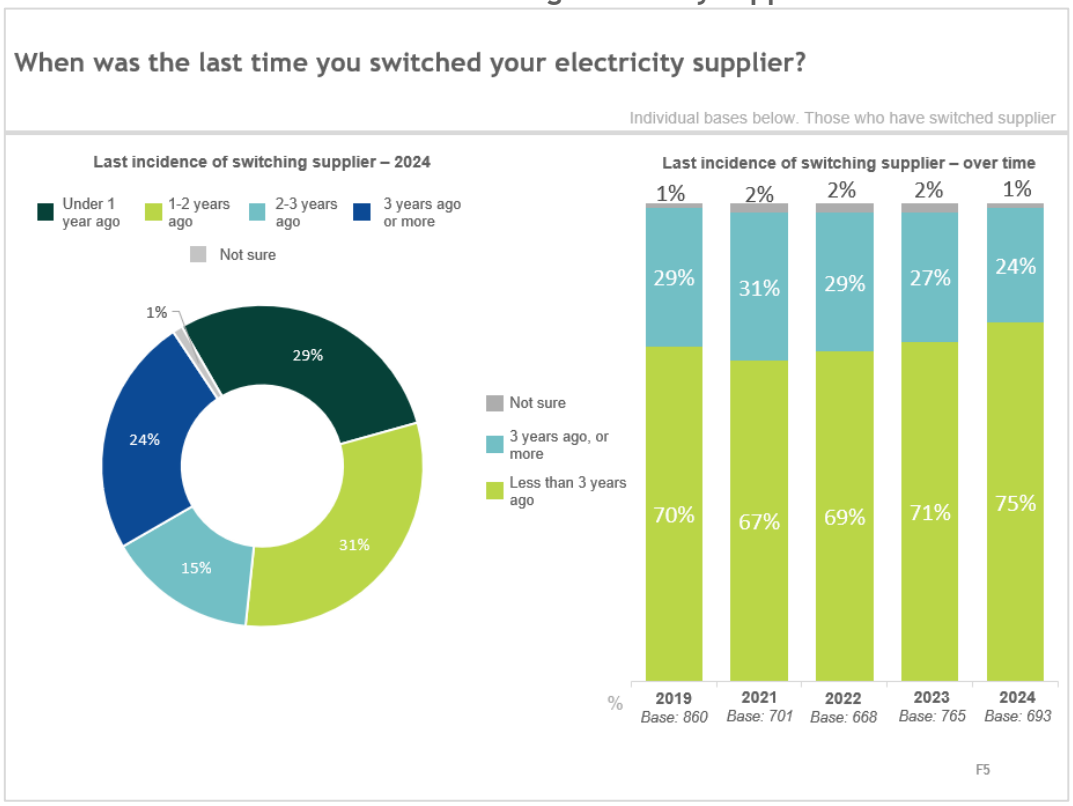
- Respondents who have a credit meter for electricity (43%) were less likely to state they had switched supplier at least once when compared with those on a prepayment meter (50%); and
- 31% of respondents who have self-disconnected from their electricity supply stated they had switched two or three times, compared to 20% of those who had not self-disconnected.

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

		Never	Once	2 or 3 times	4 or more times	Don't know	*Total*
Overall	All *Base: 1502*	53%	18%	21%	8%	1%	*100%*
Age	Under 35 *Base:213*	64%	18%	13%	4%	0%	*100%*
	35-44 *Base:271*	45%	21%	24%	9%	1%	*100%*
	45-64 *Base:592*	49%	18%	23%	9%	1%	*100%*
	65 plus *Base: 426*	59%	14%	19%	6%	1%	*100%*
Tenure	Owner occupied *Base: 1148*	53%	18%	21%	8%	1%	*100%*
	Private rented *Base: 174*	61%	15%	20%	3%	1%	*100%*
	Social rented *Base: 161*	44%	19%	25%	11%	1%	*100%*
Location	Urban *Base: 929*	48%	18%	23%	10%	1%	*100%*
	Rural *Base: 573*	61%	18%	17%	4%	0%	*100%*
Children	Yes *Base: 449*	43%	21%	25%	10%	0%	*100%*
	No *Base: 1027*	58%	16%	19%	7%	1%	*100%*
Vulnerability	High/medium vulnerability *Base: 623*	50%	18%	22%	9%	1%	*100%*
	Low vulnerability *Base: 57*	44%	35%	16%	5%	-	*100%*
	Not vulnerable *Base: 822*	56%	16%	20%	7%	1%	*100%*
Confidence using internet	Not confident *Base: 237*	65%	11%	16%	6%	2%	*100%*
	Neither *Base: 256*	52%	19%	20%	9%	0%	*100%*
	Confident *Base: 1009*	51%	19%	22%	8%	1%	*100%*
Electricity payment method	Prepayment meter *Base: 593*	49%	18%	24%	8%	1%	*100%*
	Credit meter *Base: 909*	56%	17%	19%	7%	1%	*100%*
Electricity self-disconnection	Yes *Base: 162*	39%	19%	31%	11%	-	*100%*
	No *Base: 1335*	55%	17%	20%	7%	1%	*100%*

Respondents who had switched electricity supplier were then asked when was the last time they switched. Three quarters (75%) had done so within the last three years, including 29% who had switched in the last year. A further 24% had switched at least three years ago.

Figure 8.11 Most recent instance of switching electricity supplier



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

- Respondents aged 18 to 34 (88%) were more likely to have switched electricity supplier in the last three years than those aged 45 to 64 (72%) and 65 plus (69%);
- Over three quarters (78%) of those living in urban areas would be considered switchers, compared to over two thirds (68%) living in rural areas;
- Those who consider themselves to be confident internet users (77%) were more likely to have switched electricity supplier in the last three years than those who are not confident users (65%);
- Respondents who have a prepayment meter for electricity (80%) were more likely to be switchers than those who have a credit meter (71%).

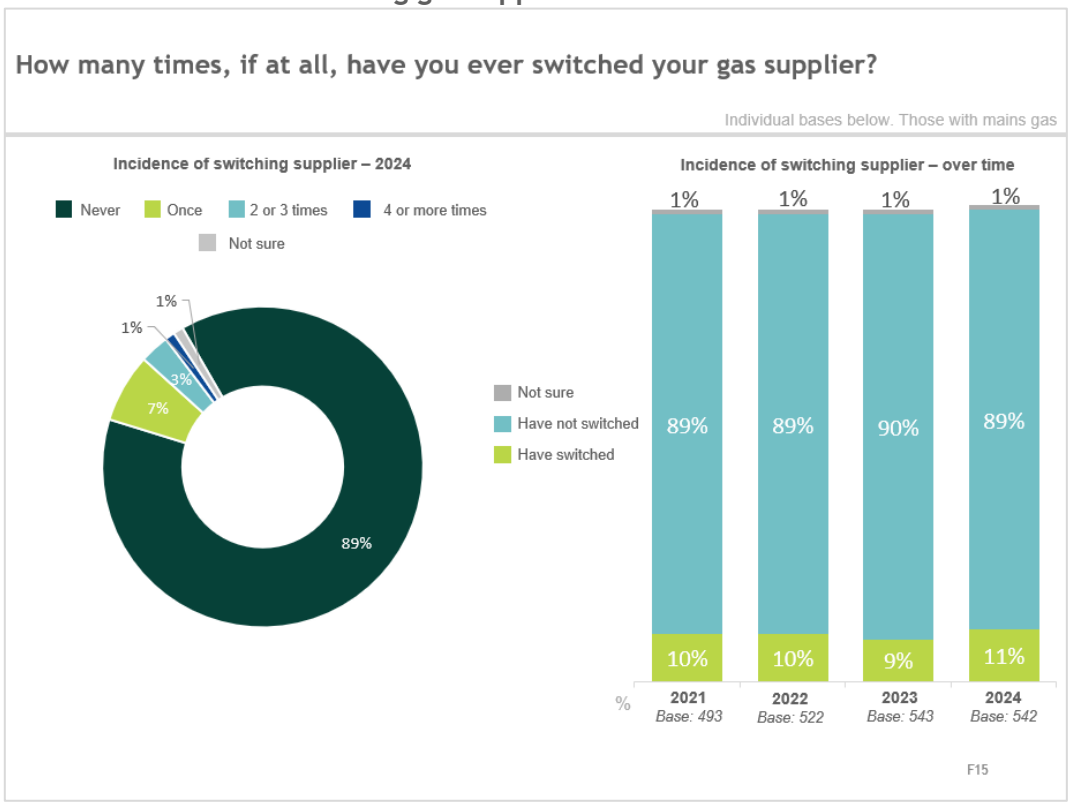
Table 8.9 Most recent instance of switching electricity supplier by age, location, confidence using the internet, and electricity payment method

		Under 1 year ago	1-2 years ago	2-3 years ago	3 years ago or more	Not sure	*Total*
Overall	All *Base: 693*	29%	31%	15%	24%	1%	*100%*
Age	Under 35 *Base: 76*	32%	47%	9%	11%	1%	*100%*
	35-44 *Base: 148*	30%	36%	13%	20%	1%	*100%*
	45-64 *Base: 300*	27%	28%	17%	27%	1%	*100%*
	65 plus *Base: 169*	32%	23%	14%	29%	2%	*100%*
Location	Urban *Base: 470*	31%	31%	15%	21%	2%	*100%*
	Rural *Base: 223*	26%	29%	13%	31%	0%	*100%*
Confidence using the internet	Not confident *Base: 78*	26%	27%	13%	33%	1%	*100%*
	Neither *Base: 122*	21%	30%	18%	30%	2%	*100%*
	Confident *Base: 493*	32%	31%	14%	21%	1%	*100%*
Electricity payment method	Prepayment meter *Base: 300*	29%	34%	17%	19%	1%	*100%*
	Credit meter *Base: 393*	30%	28%	13%	28%	2%	*100%*

Gas

89% of gas customers with the option to switch have never switched their supplier, while 11% have switched at least once.

Figure 8.12 Incidence of switching gas supplier



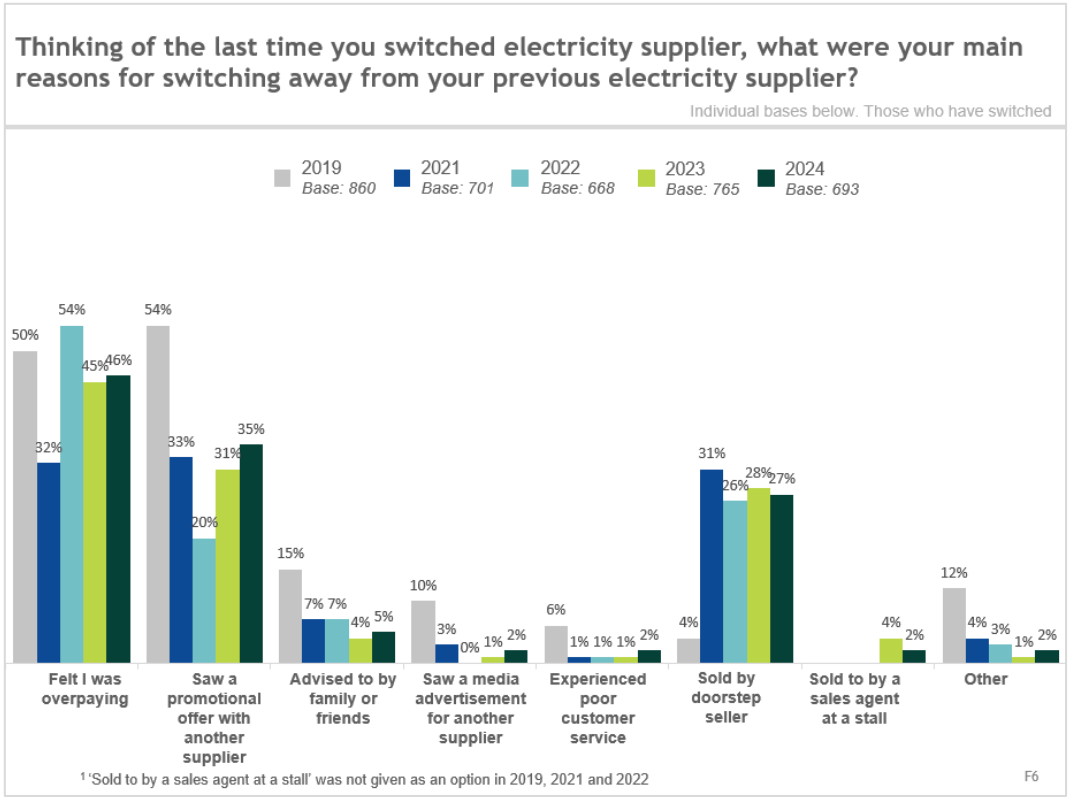
Of the 57 respondents who had switched their gas supplier, 37 had switched within the last three years, while 20 had switched at least three years ago.

Reasons for switching

Electricity

There were three main drivers for switching electricity supplier: i) reacting to feeling the respondent was paying too much; ii) reacting to a promotional offer from another supplier; and iii) reacting to an offer from a doorstep seller (see Figure 8.13). Almost half (46%) felt that they were overpaying on their previous deal (up slightly from 45% in 2022), while one third (35%) had seen an offer from another supplier (up from 31% in 2023). One quarter (27%) received an offer from a doorstep seller, down slightly from 28% in 2023.

Figure 8.13 Reasons for switching electricity supplier



Gas

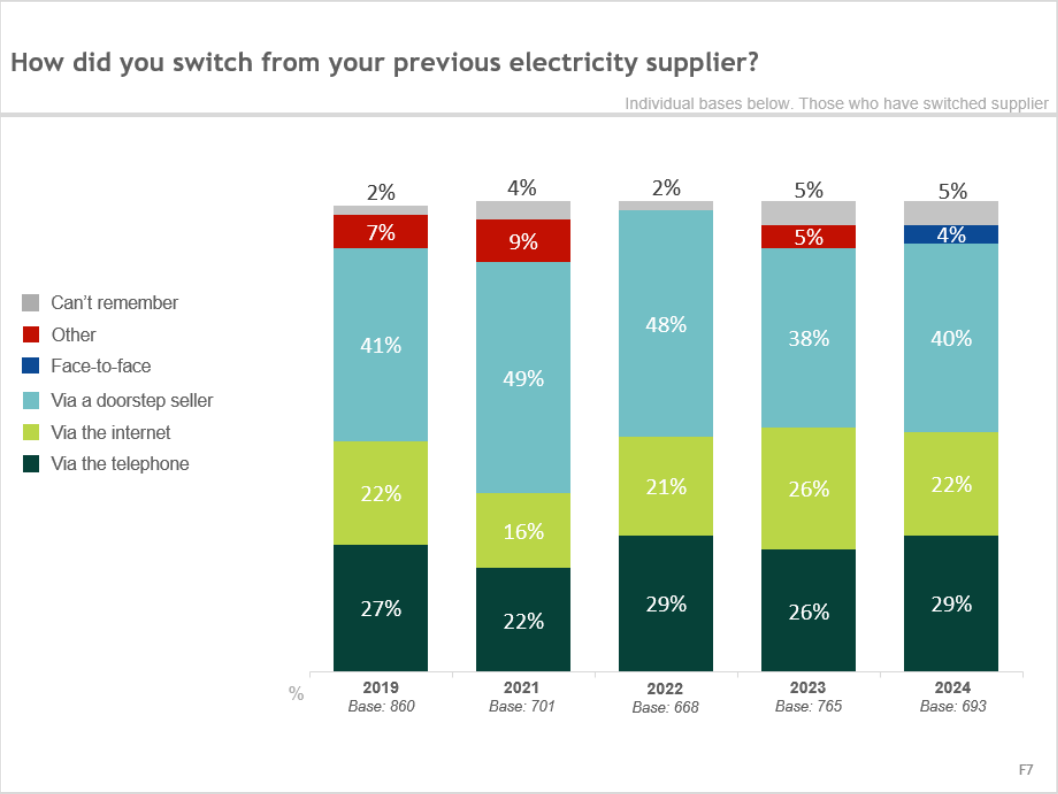
Gas customers have similar drivers for switching: i) reacting to feeling they were overpaying; ii) reacting to a promotional offer from another supplier; and iii) reacting to a deal offered by a doorstep seller. 34 of the 57 respondents who had switched gas supplier said they felt they were overpaying on their previous deal, and a further 14 respondents said it was because they saw a promotional offer from another supplier. 11 respondents reported they had been sold their deal by a doorstep seller.

Experience of switching

Electricity

The most common method used to switch electricity supplier was through a doorstep seller, with two in five (40%) saying this. Telephone (29%) and using the internet (22%) were the next most popular methods. 4% switched at a stall in a shopping centre or at an event (see Figure 8.14).

Figure 8.14 Method of switching electricity supplier



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

- One third (32%) of respondents aged 18 to 34 switched electricity supplier via the internet, compared to 15% aged 65 and over;
- While respondents in the ABC1 group (27%, compared to 18% in the C2DE group) were more likely to say they switched over the internet, those in the C2DE group (46%, compared to 35% in the ABC1 group) were more likely to have switched through a doorstep seller;
- Three in five (61%) respondents living in social housing said they were approached by a doorstep seller, compared to 38% who own their home and 32% who privately rent;
- Respondents living in urban areas (45%) were more likely to have been approached by a doorstep seller than those in rural areas (31%), who were instead more likely to have switched via the internet (30%, compared to 19% in urban areas);
- Respondents who have someone with a disability or illness in their household (53%) were more likely to have switched supplier after being approached by a doorstep seller than those who do not have or live with someone who has a disability or illness (38%);
- Those who have children living in their household (35%) were less likely to have switched via a doorstep seller than those who do not have children (44%);

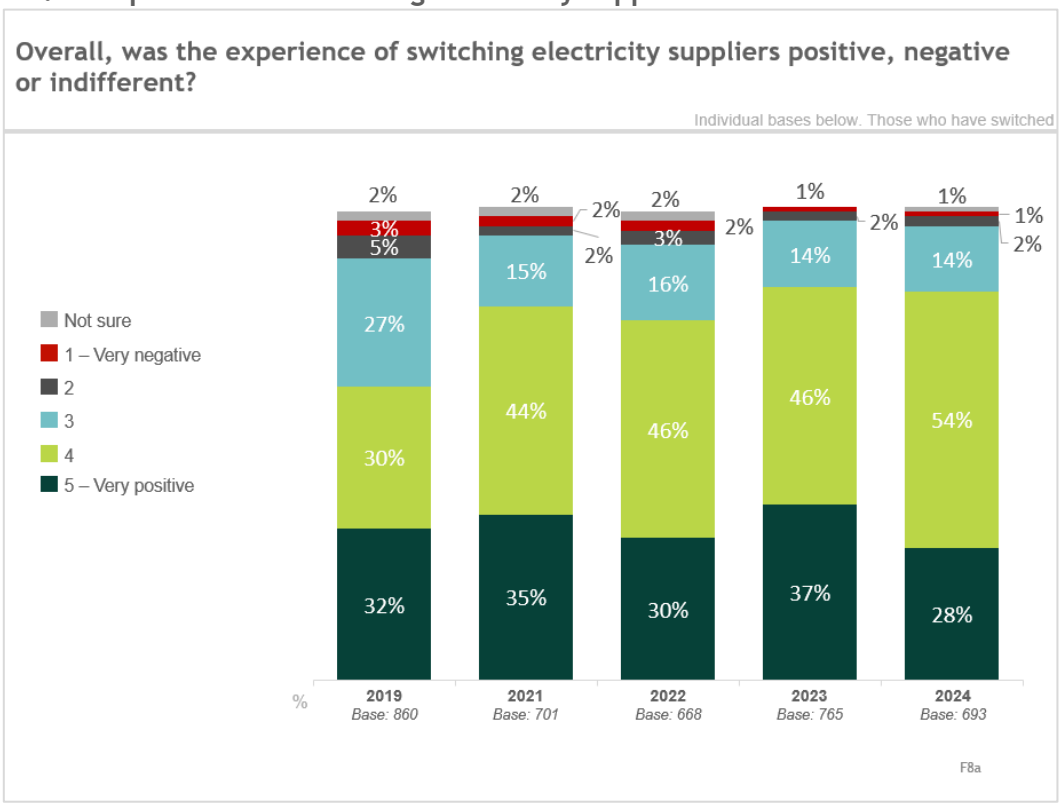
- Respondents who consider themselves to be confident internet users (37%) were not as likely to have switched via a doorstep seller compared to those who are not confident internet users (53%); and
- Those who have a credit meter for electricity (25%) were more likely to have switched their supplier via the internet when compared with those who have a prepayment meter (18%).

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

		Via the telephone	Via the internet	Via a doorstep seller	Shopping centre, stall at an event etc	Can't remember	*Total*
Overall	All *Base: 693*	29%	22%	40%	4%	5%	*100%*
Age	Under 35 *Base: 76*	32%	32%	29%	4%	4%	*100%*
	35-44 *Base: 148*	24%	35%	32%	4%	4%	*100%*
	45-64 *Base: 300*	26%	18%	46%	5%	5%	*100%*
	65 plus *Base: 169*	36%	15%	43%	2%	5%	*100%*
SEG	ABC1 *Base: 350*	30%	27%	35%	3%	5%	*100%*
	C2DE *Base: 333*	27%	18%	46%	5%	5%	*100%*
Tenure	Owner occupied *Base: 533*	29%	25%	38%	4%	5%	*100%*
	Private rented *Base: 65*	37%	23%	32%	5%	3%	*100%*
	Social rented *Base: 88*	24%	6%	61%	5%	5%	*100%*
Location	Urban *Base: 470*	29%	19%	45%	4%	4%	*100%*
	Rural *Base: 223*	29%	30%	31%	4%	5%	*100%*
Disability/ illness	Yes *Base: 117*	24%	15%	53%	6%	3%	*100%*
	No *Base: 501*	30%	25%	38%	3%	5%	*100%*
Children	Yes *Base: 252*	25%	30%	35%	5%	5%	*100%*
	No *Base: 426*	30%	17%	44%	3%	5%	*100%*
Vulnerability	High/medium vulnerability *Base: 306*	27%	24%	41%	4%	4%	*100%*
	Low vulnerability *Base: 32*	38%	22%	34%	-	6%	*100%*
	Not vulnerable *Base: 355*	29%	21%	40%	5%	5%	*100%*
Confidence using the internet	Not confident *Base: 78*	28%	5%	53%	5%	9%	*100%*
	Neither *Base: 122*	29%	15%	46%	4%	7%	*100%*
	Confident *Base: 493*	29%	27%	37%	4%	3%	*100%*
Electricity payment method	Prepayment meter *Base: 300*	29%	18%	43%	4%	5%	*100%*
	Credit meter *Base: 393*	29%	25%	38%	4%	4%	*100%*

82% had a positive experience (rating ‘4’ or ‘5’) when they switched supplier, with 3% reporting a negative experience (rating ‘1’ or ‘2’) (see Figure 8.15).

Figure 8.15 Experience of switching electricity supplier



Gas

22 of the 57 respondents who had switched their gas supplier did so after being approached by a doorstep seller. 18 respondents switched via the telephone, and 13 respondents switched via the internet.

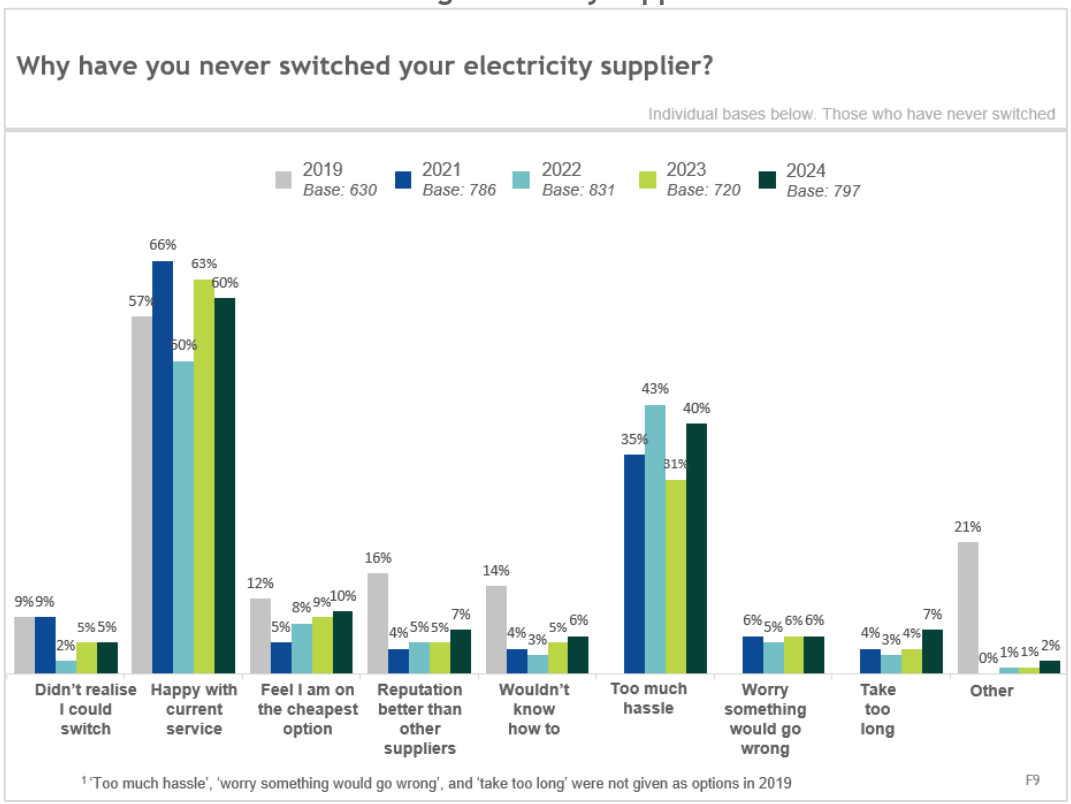
39 respondents had a positive (rating ‘4’ or ‘5’) experience of switching.

Reasons for not switching

Electricity

When asked why they had never switched electricity supplier, three in five (60%) said it was because they were happy with their current service (a slight decrease from 63% in 2023), while a further two fifths (40%) thought it would be too much hassle to switch (increasing from 31% in 2023). 5% of respondents were unaware that they could switch their electricity supplier (see Figure 8.16).

Figure 8.16 Reasons for not switching electricity supplier



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

- Respondents aged 65 and over (71%) were more likely than all other age groups (54% aged 18 to 34, 49% aged 35 to 44, and 57% aged 45 to 64) to say they had not switched because they were happy with their current service;
- Those who own their home (61%) were more likely to say they were happy with their current service than those who privately rent (49%);
- 9% of those living in rural areas said they would not know how to switch supplier, compared to 4% in urban areas;
- Respondents who have someone in the household with a disability or illness were more likely to say they were worried something would go wrong (14%) and that they would not know how to switch supplier (13%) when compared with those without someone with a disability or illness in the household (5% and 6% respectively);
- Respondents with no children in their household (62%) were more likely to say they were happy with the current service than those who do have children (51%); and
- Respondents in the high or medium vulnerability group were more likely to say they feel they are on the cheapest option (13%, compared to 8% who are not vulnerable), their current supplier's reputation is better than others (11%, compared to 4% who are not vulnerable), and that they were worried something would go wrong (10%, compared to 4% who are not vulnerable).

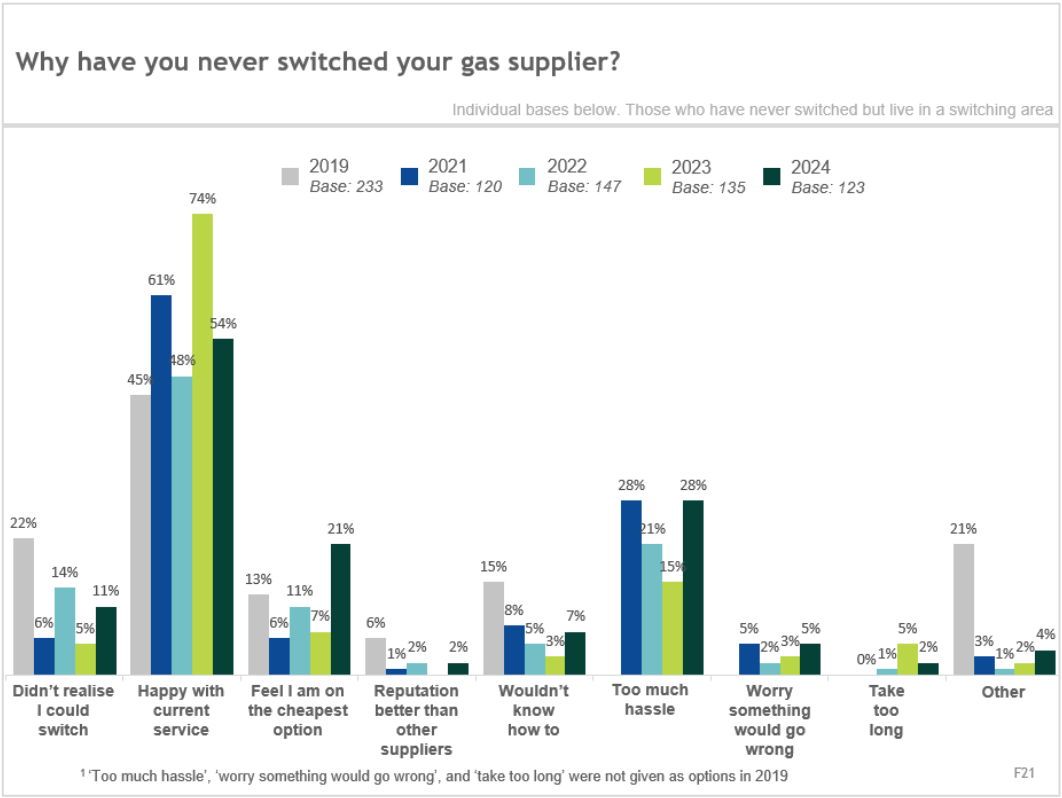
Table 8.11 Reasons for not switching electricity supplier by age, tenure, location, disability/illness, children, and vulnerability

		Didn't realise I could switch	Happy with current service	Feel I am on the cheapest option	Reputation better than other suppliers	Wouldn't know how to	Too much hassle	Worry something would go wrong	Take too long	Other
Overall	All *Base: 797*	5%	60%	10%	7%	6%	40%	6%	7%	2%
Age	Under 35 *Base: 136*	4%	54%	8%	1%	10%	43%	4%	10%	6%
	35-44 *Base: 121*	3%	49%	15%	12%	6%	40%	11%	12%	2%
	45-64 *Base: 289*	5%	57%	9%	9%	5%	43%	8%	6%	1%
	65 plus *Base: 251*	6%	71%	8%	4%	6%	33%	3%	6%	1%
Tenure	Owner occupied *Base: 609*	5%	61%	9%	7%	5%	39%	7%	7%	2%
	Private rented *Base: 107*	4%	49%	9%	4%	12%	42%	3%	9%	5%
	Social rented *Base: 71*	4%	61%	11%	3%	10%	38%	4%	8%	1%
Location	Urban *Base: 449*	4%	62%	10%	5%	4%	38%	5%	7%	2%
	Rural *Base: 348*	6%	57%	9%	8%	9%	41%	7%	7%	2%
Disability/ illness	Yes *Base: 124*	6%	60%	7%	10%	13%	44%	14%	4%	3%
	No *Base: 598*	5%	58%	11%	7%	6%	41%	5%	8%	2%
Children	Yes *Base: 195*	5%	51%	10%	6%	7%	45%	7%	10%	3%
	No *Base: 593*	5%	62%	9%	7%	6%	38%	6%	6%	2%
Vulnerability	High/medium vulnerability *Base: 312*	6%	55%	13%	11%	9%	42%	10%	8%	2%
	Low vulnerability *Base: 25*	4%	48%	4%	4%	12%	52%	8%	8%	12%
	Not vulnerable *Base: 460*	4%	63%	8%	4%	4%	37%	4%	7%	1%

Gas

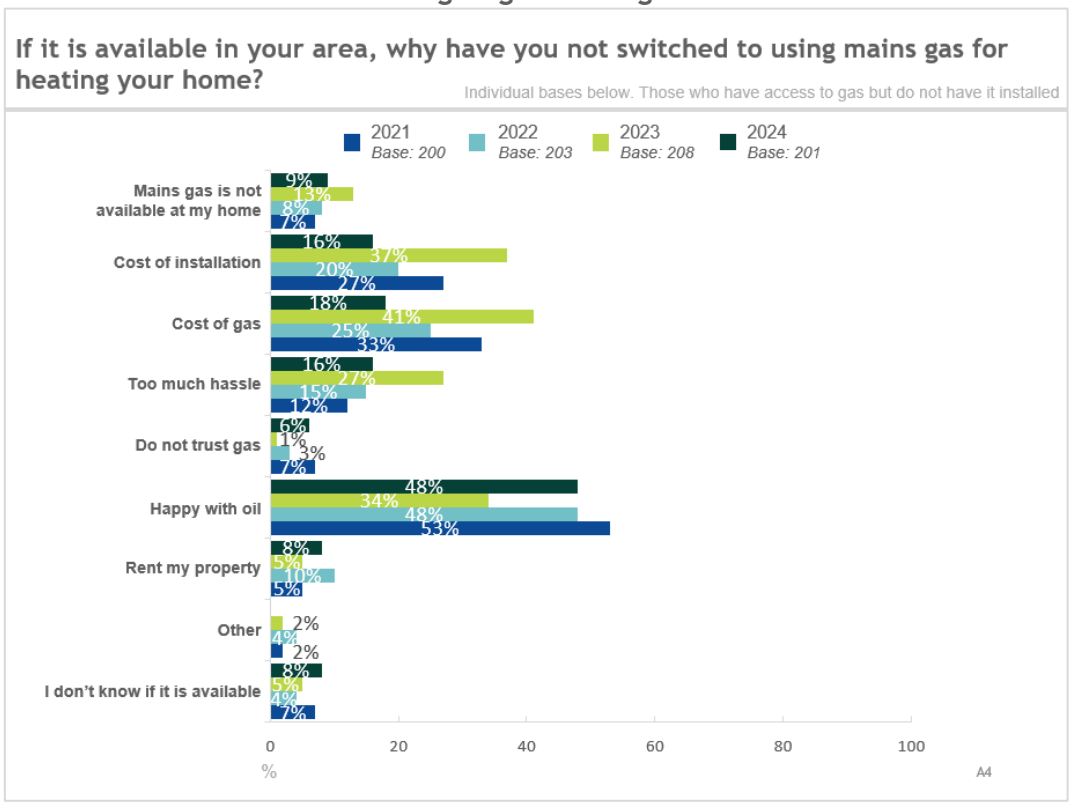
Gas customers who had the option to switch gave similar reasons for not switching supplier as electricity customers, with 54% saying they were happy with their current service and 28% believing it would be too much hassle to switch. This compares to 74% and 15% respectively who reported these reasons in the 2023 Tracker. 11% also claimed that they did not know they could switch their supplier, while 7% were unsure how to go about switching (see Figure 8.17).

Figure 8.17 Reasons for not switching gas supplier



35% of respondents confirmed that they had access to gas in their area but did not have it installed in their home. Half (48%) of these respondents said the reason for this was because they were content to remain on oil. 18% mentioned the cost of gas and 16% gave the cost of installation as a reason for not having gas in their home (see Figure 8.18).

Figure 8.18 Reasons for not switching to gas heating



Likelihood of switching in the future

16% of electricity customers and 10% of gas customers who are able to switch suppliers said that they were quite or very likely to switch their supplier in the next 12 months (see Figures 8.19 and 8.20).

Figure 8.19 Likelihood of switching electricity supplier

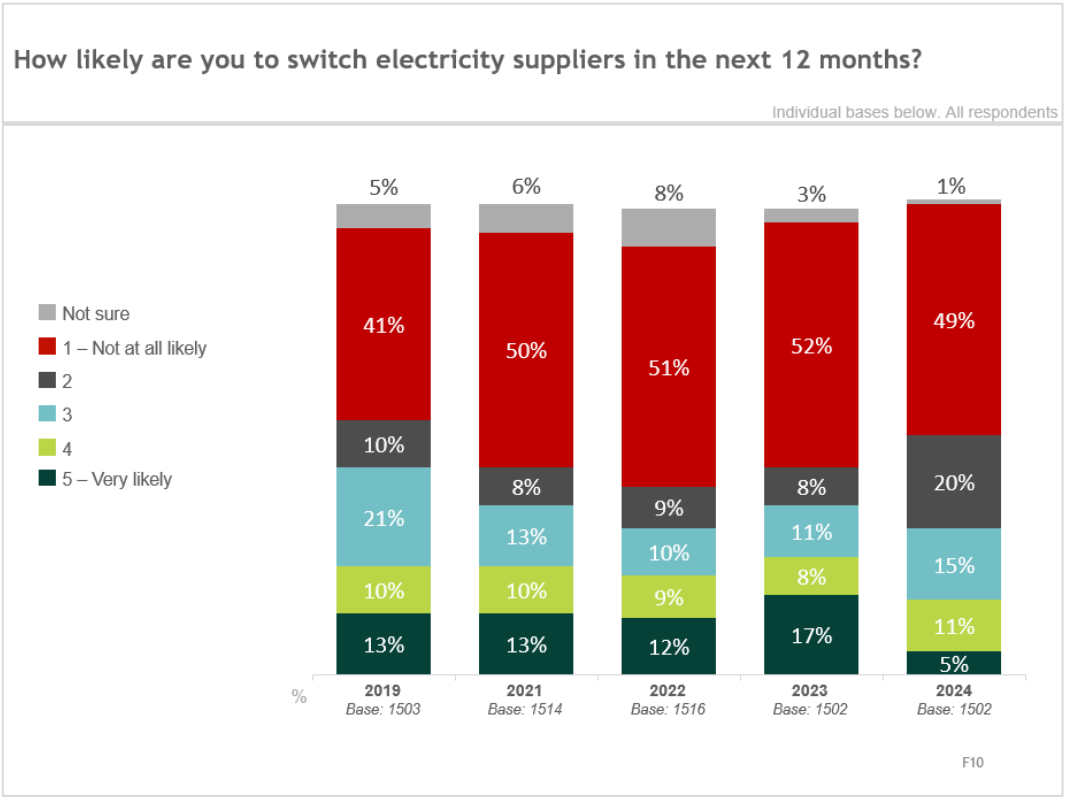
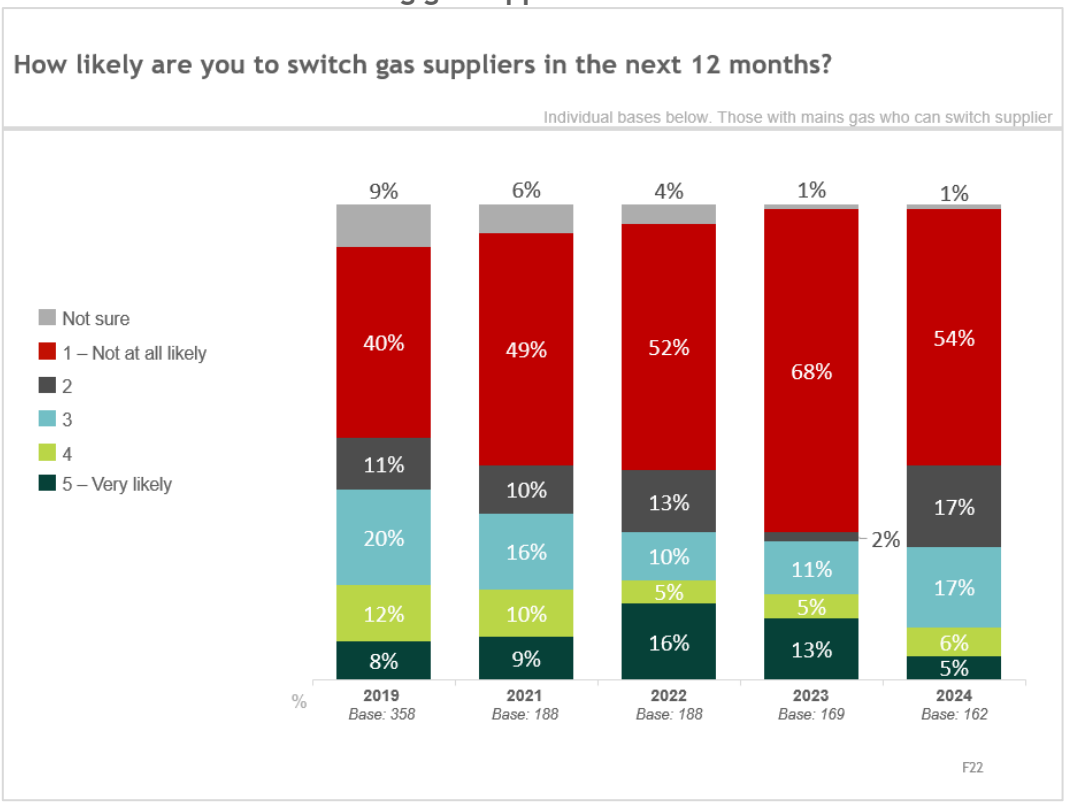


Figure 8.20 Likelihood of switching gas supplier



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

- One fifth (20%) of respondents who have children in their household said they would be likely to switch electricity supplier, compared to 14% of those who do not have children;
- Respondents who consider themselves to be confident internet users (19%) were more likely to say they would switch electricity supplier in the next 12 months than those who do not consider themselves to be confident internet users (8%);
- Respondents who have switched their supplier in the past three years (31%) were more likely than those who had not switched (8%) to say they would switch again in the next 12 months; and
- Although there was no significant difference between those who said they were likely to switch in the next year, respondents who had not self-disconnected from their electricity supply (69%) were more likely to say they would not switch when compared with those who had self-disconnected (59%).

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

		Not likely	Neither	Likely	Don't know	*Total*
Overall	All *Base: 1502*	68%	15%	16%	1%	*100%*
Children	Yes *Base: 449*	61%	18%	20%	1%	*100%*
	No *Base: 1027*	72%	13%	14%	1%	*100%*
Confidence using internet	Not confident *Base: 237*	82%	8%	8%	1%	*100%*
	Neither *Base: 256*	68%	18%	12%	2%	*100%*
	Confident *Base: 1009*	65%	15%	19%	1%	*100%*
Electricity switching	Switchers *Base: 517*	44%	24%	31%	2%	*100%*
	Non-switchers *Base: 985*	81%	10%	8%	1%	*100%*
Electricity self-disconnection	Yes *Base: 162*	59%	21%	20%	-	*100%*
	No *Base: 1335*	69%	14%	15%	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.

9. Payment difficulties

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

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

Key findings

- The proportion of respondents who sometimes struggle to pay their electricity bills has decreased from 33% in 2023 to 23%:
  - 3% often or always struggle to pay, similar to 2023 (4%).
- For gas, the proportion of consumers who sometimes struggle to pay has also decreased from 36% to 27%:
  - The proportions who often or always struggle to pay has decreased from 5% to 2%.
- 24% of respondents with a prepayment meter reported that they had run out of credit on their meter and had gone without electricity over the past year.
  - This is an increase from 2023 in which 20% with a prepayment meter had gone without electricity.
  - Of those who had gone without electricity, 38% reported that it was because they could not afford to top up.
- 6% of consumers reported that they have had to delay or go without other essentials so that they could pay for electricity, a reduction from 9% in 2023.
- 8% reported delaying or going without other essentials to pay for gas compared to 10% in the 2023 Tracker.
- 42% of respondents have reduced their electricity usage over the last year, which follows on from 71% in the 2023 Tracker and 85% in 2022.
- 5% of electricity respondents had borrowed money to pay their electricity bills, similar to 6% in 2023.
- This was also true for gas customers, with 42% reducing their usage (71% in 2023 and 87% in 2022) and 6% borrowing money to pay their bill (10% in 2023).
- Respondents who have someone in their household with a disability or illness and who would be considered to be in the high or medium vulnerability group were more likely to indicate that they were sometimes struggling with their electricity bills, had gone without essentials to pay for electricity, had reduced their electricity usage, and had borrowed to pay their electricity bills.
  - This was also the case for those on a prepayment meter for electricity, who had switched electricity supplier in the last three years, and who had self-disconnected from their electricity supply in the last year.

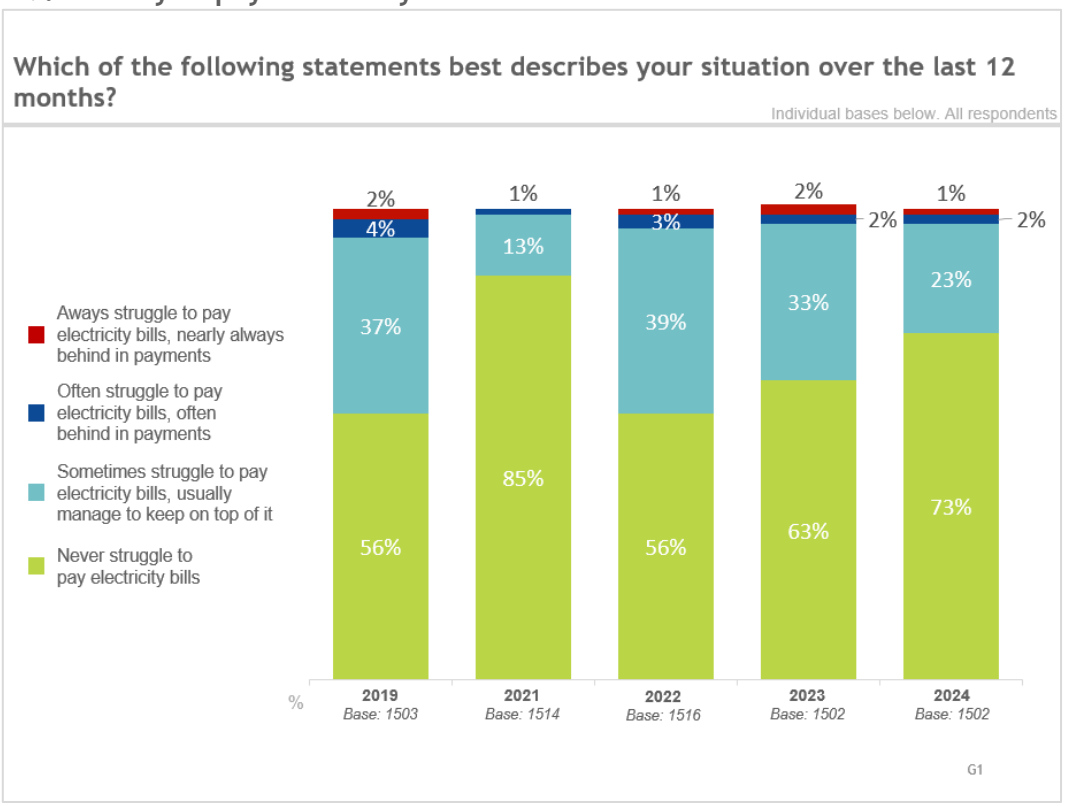
Current financial situation

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

Electricity

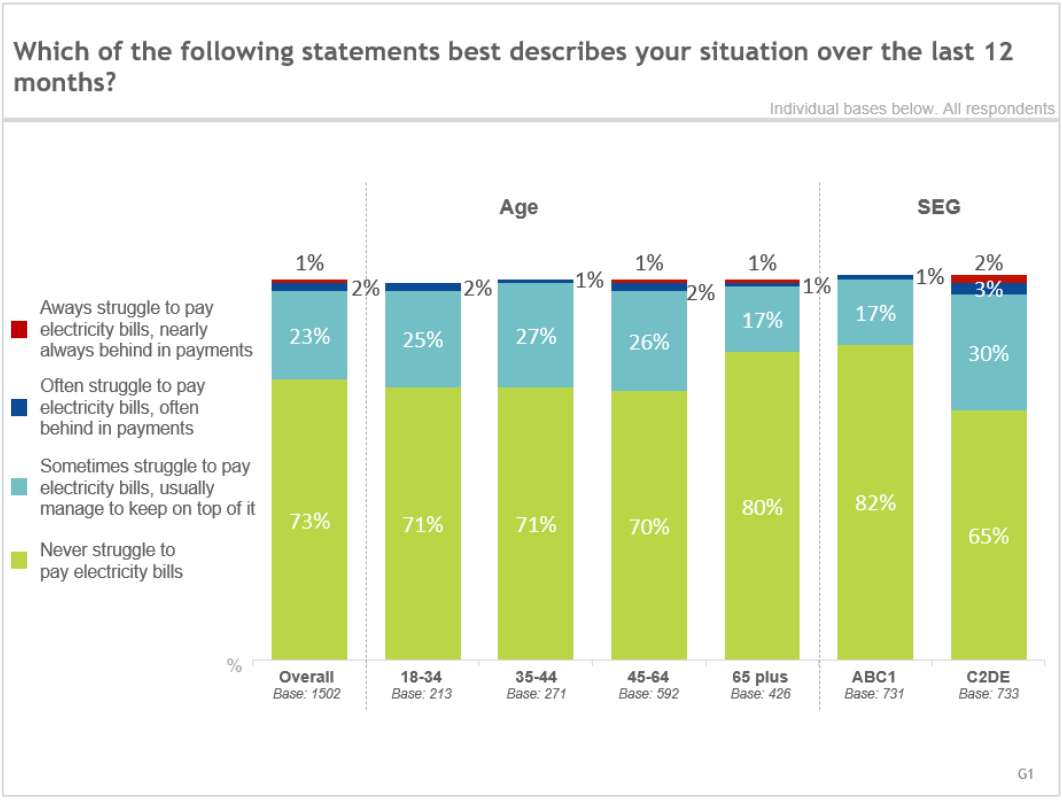
Three quarters (73%) of respondents reported that they never struggle to pay their electricity bills, increasing from 63% in 2023. One quarter (23%) said they sometimes struggle to pay their bills but usually were able to keep on top of them (down from 33% in 2023), while 3% stated that they were often or always behind in their payments.

Figure 9.1 Ability to pay electricity bills



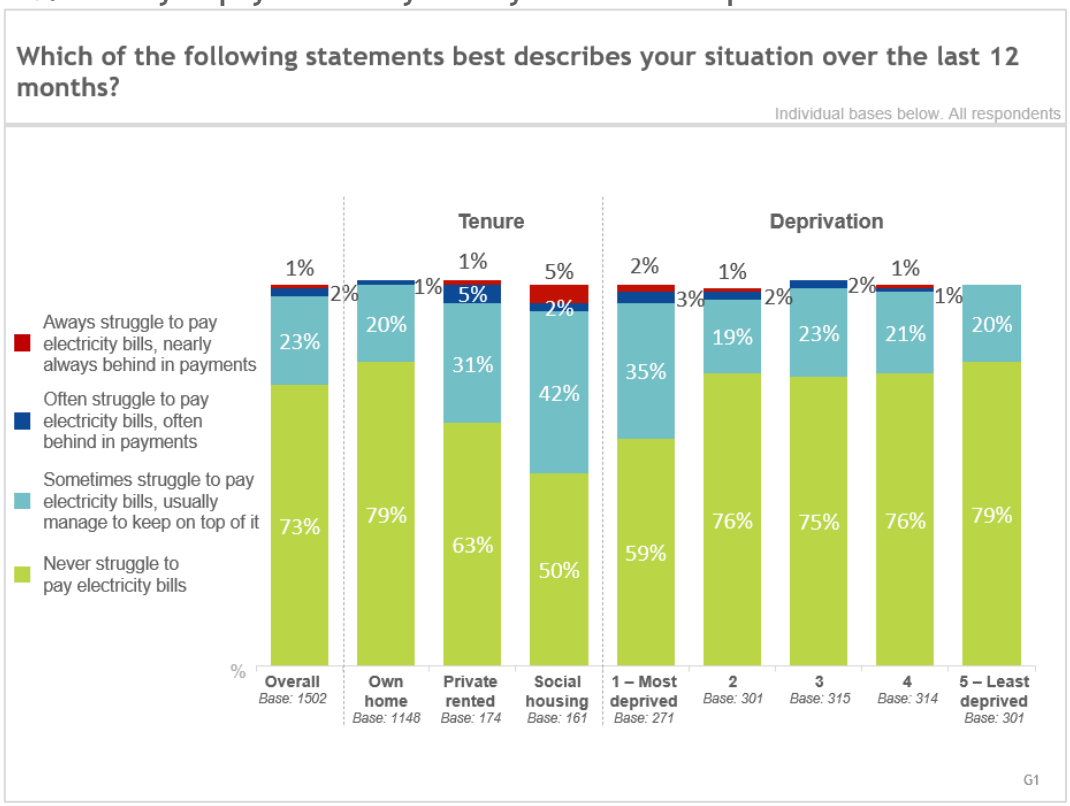
Respondents aged 65 and over (80%) were more likely than all other age groups to say they never struggle with their electricity bills, with those in the 18 to 34 age group more likely to state they sometimes struggle (25%) than those in the older age group (17%). 30% of those in the C2DE group reported that they sometimes struggle to pay, compared to 17% in the ABC1 group (see Figure 9.2).

Figure 9.2 Ability to pay electricity bills by age and SEG



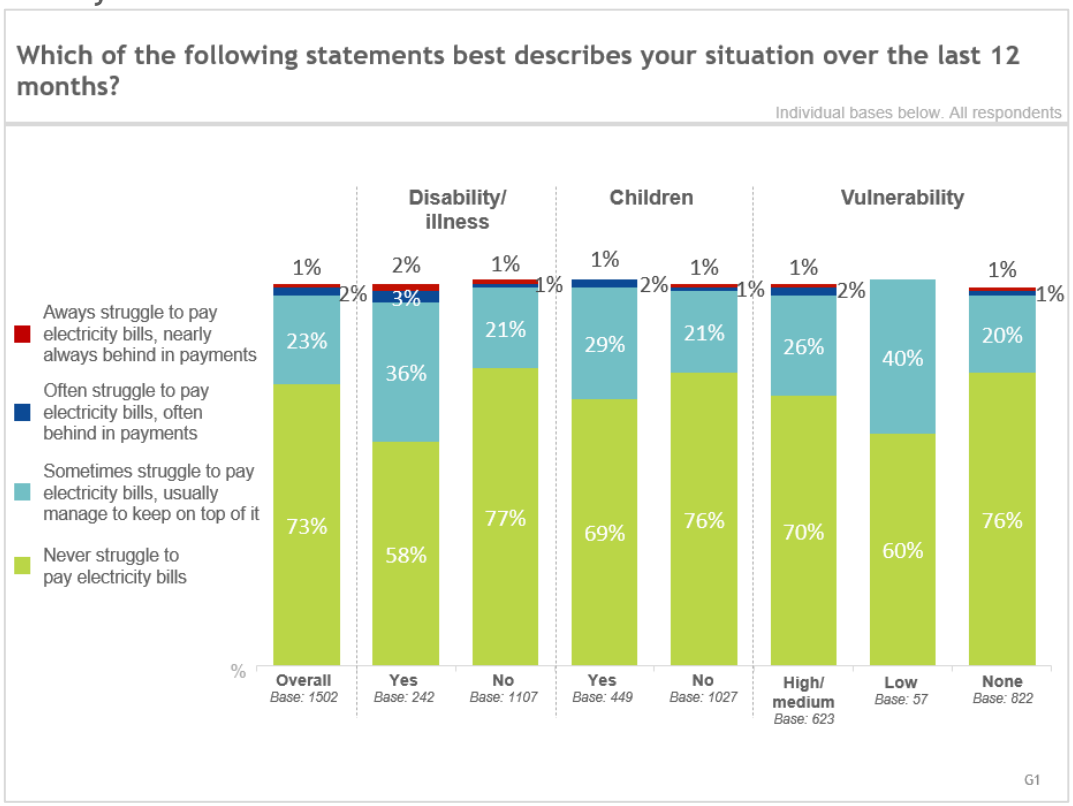
Those who live in social housing (42%) and who privately rent (31%) were more likely to say they sometimes struggle to pay their bills than those respondents who own their home (20%). 7% of respondents who live in social housing and 6% who privately rent also stated that they often or always struggle to keep up with payments, compared to 1% of those who own their home. Respondents who live in the most deprived areas (35%) were more likely to report that they sometimes struggle to pay their electricity bill than those living in the least deprived areas (20%) (see Figure 9.3).

Figure 9.3 Ability to pay electricity bills by tenure and deprivation



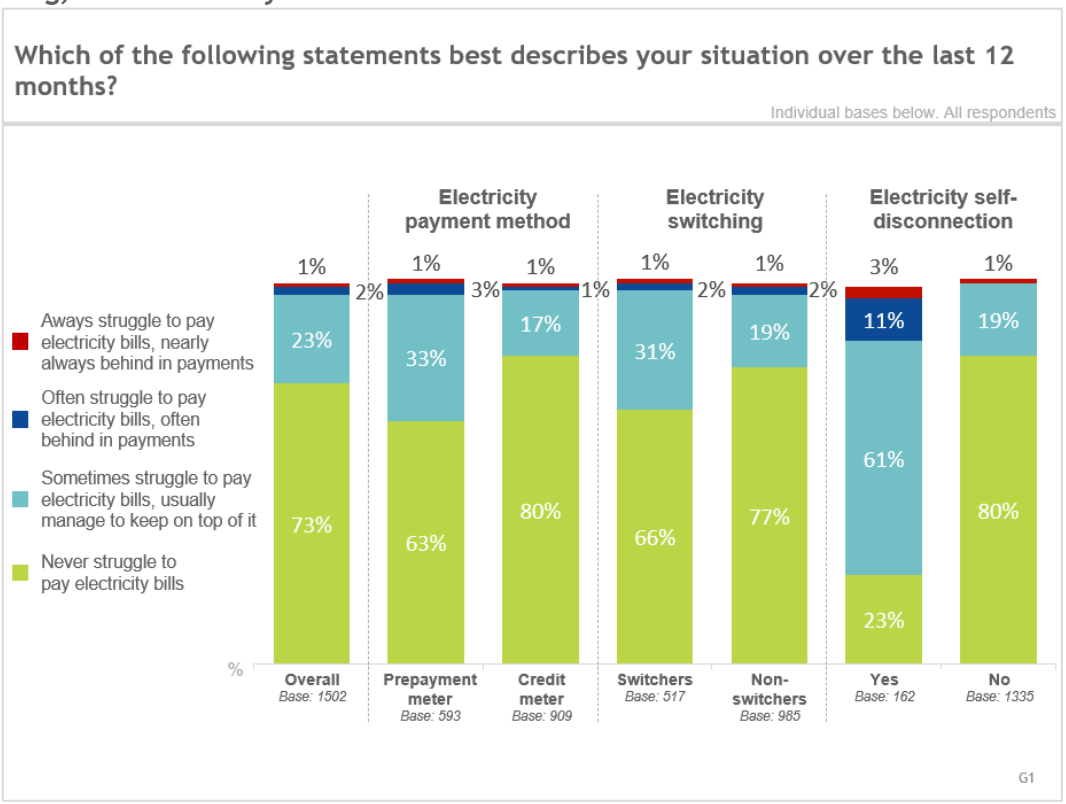
Respondents who have or live with someone who has a disability or illness (36%) were more likely than those who do not (21%) to say they sometimes struggle with their electricity bills, while those who have children in their household (29%) were more likely to state that they sometimes struggle when compared with those who do not have children (21%). One quarter (26%) of respondents who are considered to be in the high or medium vulnerability group said they sometimes struggle, compared to 20% of those who are not vulnerable (see Figure 9.4).

Figure 9.4 Ability to pay electricity bills by disability/illness, children, and vulnerability



Respondents who have a prepayment meter for electricity (33%) were more likely than those with a credit meter (17%) to say they sometimes struggle to pay their electricity bills. Electricity switchers (31%) were more likely to indicate that they sometimes struggle than non-switchers (19%). Three in five (61%) of those who have self-disconnected from their electricity supply reported that they sometimes struggle to pay their electricity bill, with a further 14% saying they often or always struggle to keep up with payments. This compares to 19% and 1% respectively of those who have not self-disconnected (see Figure 9.5).

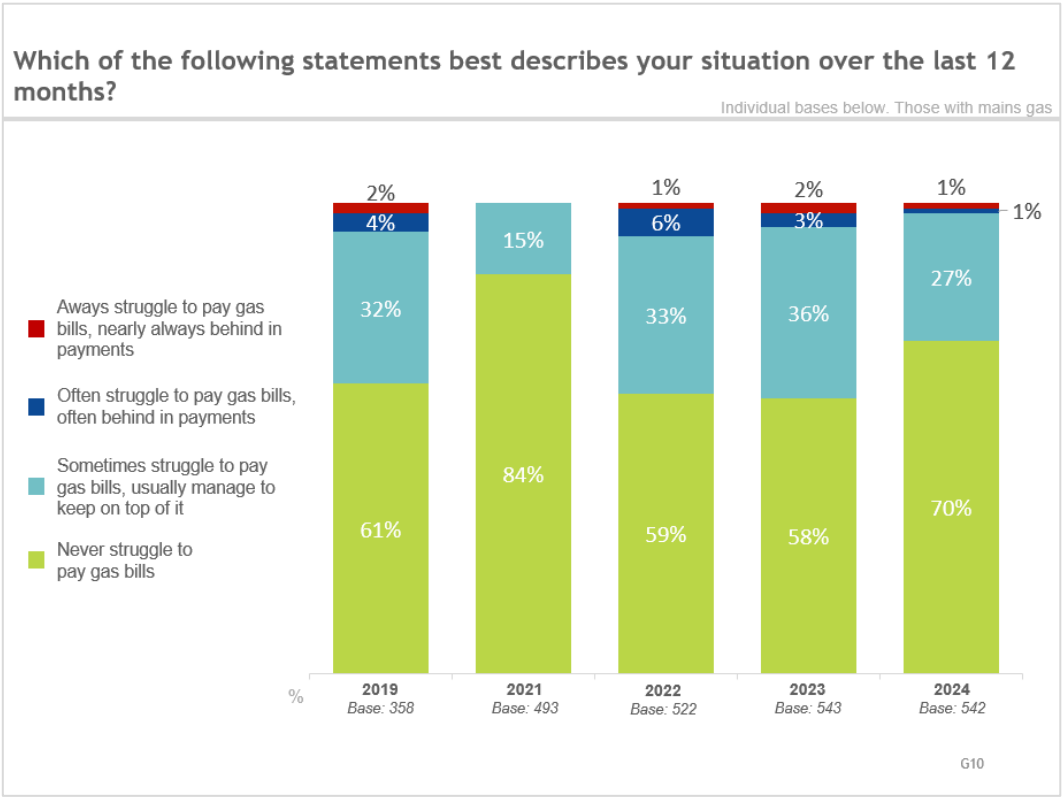
Figure 9.5 Ability to pay electricity bills by electricity payment method, electricity switching, and electricity self-disconnection



Gas

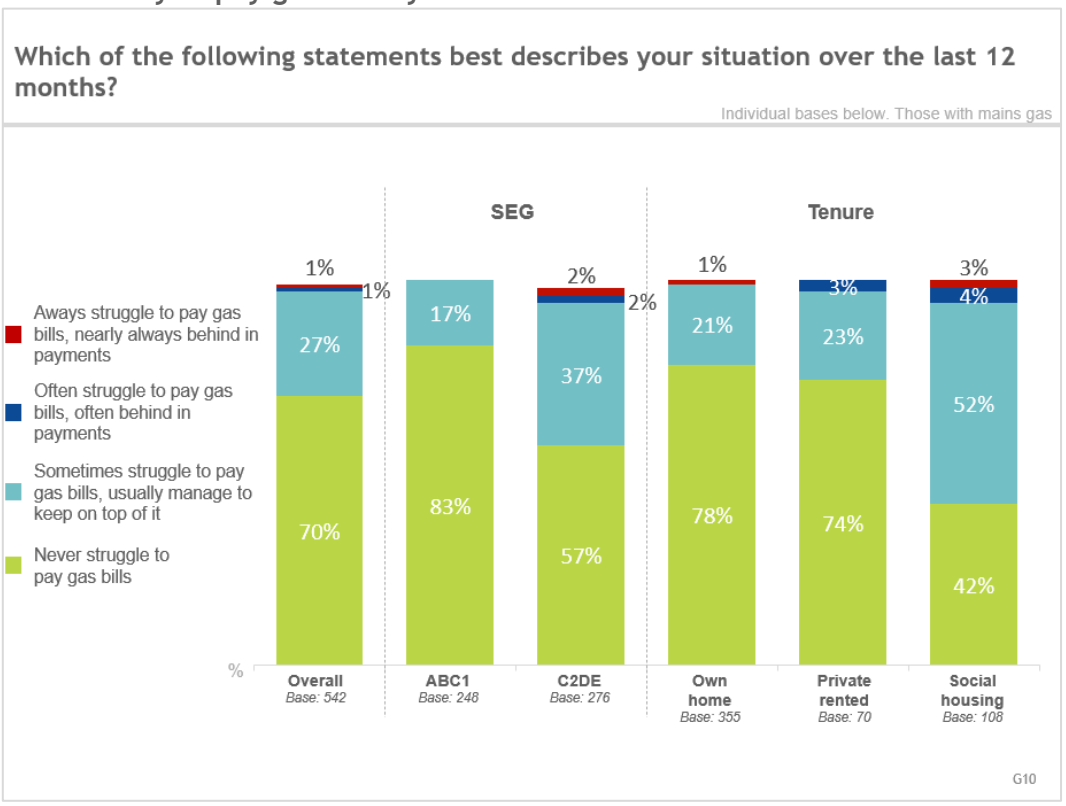
70% of gas consumers stated that they never struggle to pay their gas bills and one quarter (27%) said that they sometimes struggle but were able to manage their bills. This compares to 58% who said they never struggle and 36% who sometimes struggle in the 2023 Tracker. Gas customers on a prepayment meter (35%, compared to 17% with a credit meter) were again more likely to say they sometimes struggle to pay their bills. 2% of gas customers reported that they are often or always behind in paying their bills (see Figure 9.6).

Figure 9.6 Ability to pay gas bills



37% of gas customers in the C2DE group said they sometimes struggle, compared to 17% of those in the ABC1 group. Respondents living in social housing (52%) were more likely to sometimes struggle with their gas bill than those who privately rent (23%) and who own their home (21%) (see Figure 9.7).

Figure 9.7 Ability to pay gas bills by SEG and tenure

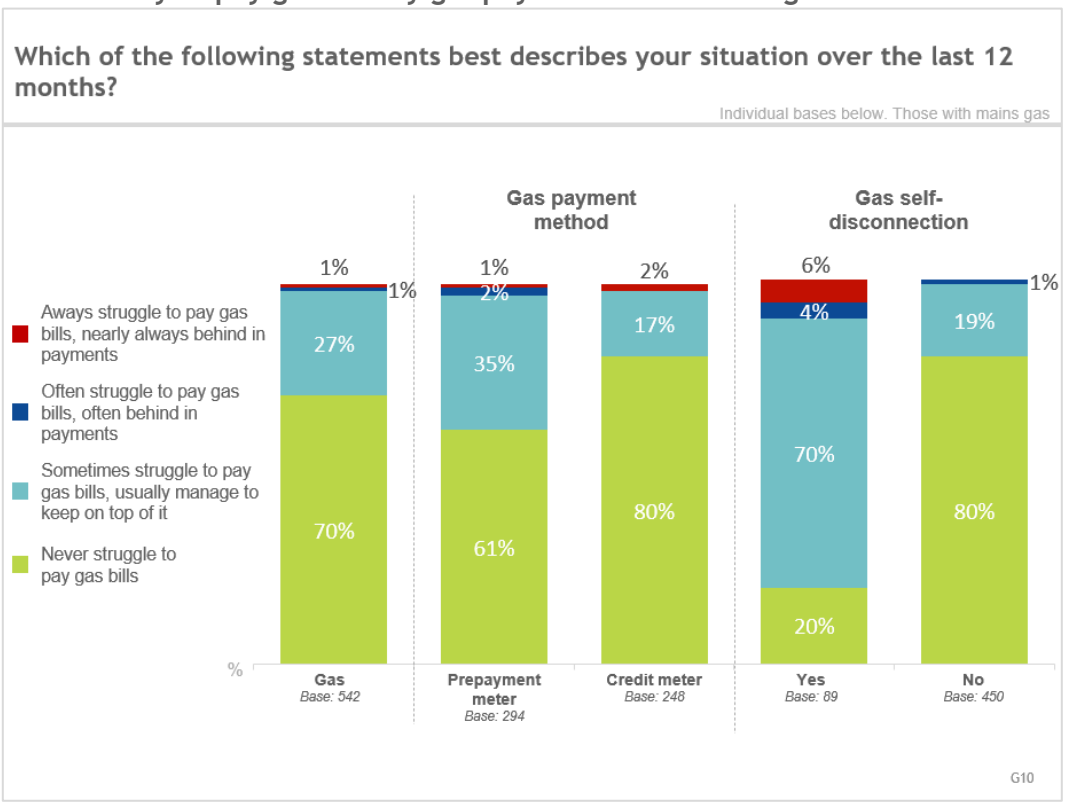


Respondents who have or live with someone who has a disability or illness (47%) were more likely to report that they sometimes struggle to pay their gas bill than those who do not have someone with a disability or illness in their household (23%). Those who would be considered to be in the high or medium vulnerability group (33%) were also more likely to sometimes struggle when compared with those who are not vulnerable (21%) (see Figure 9.8).

Figure 9.8 Ability to pay gas bills by disability/illness and vulnerability

Respondents who have self-disconnected from their gas supply were more likely to report that they sometimes struggle (70%) and are often or always behind in their payments (10%) when compared with those who had not self-disconnected (19% and 1% respectively) (see Figure 9.9).

Figure 9.9 Ability to pay gas bills by gas payment method and gas self-disconnection



Reasons for being without energy

Electricity

Almost all (97%) respondents with a credit meter said that in the past 12 months they had never gone without electricity that they needed because of the cost, with 1% saying this occurred a few times a year (see Figure 9.10). Respondents with an electricity prepayment meter were more likely than credit customers to have gone without electricity in the past 12 months. 16% had occasionally gone without electricity, 7% said this happened around once a month and 2% mentioned that they go without electricity most weeks (see Figure 9.11).

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

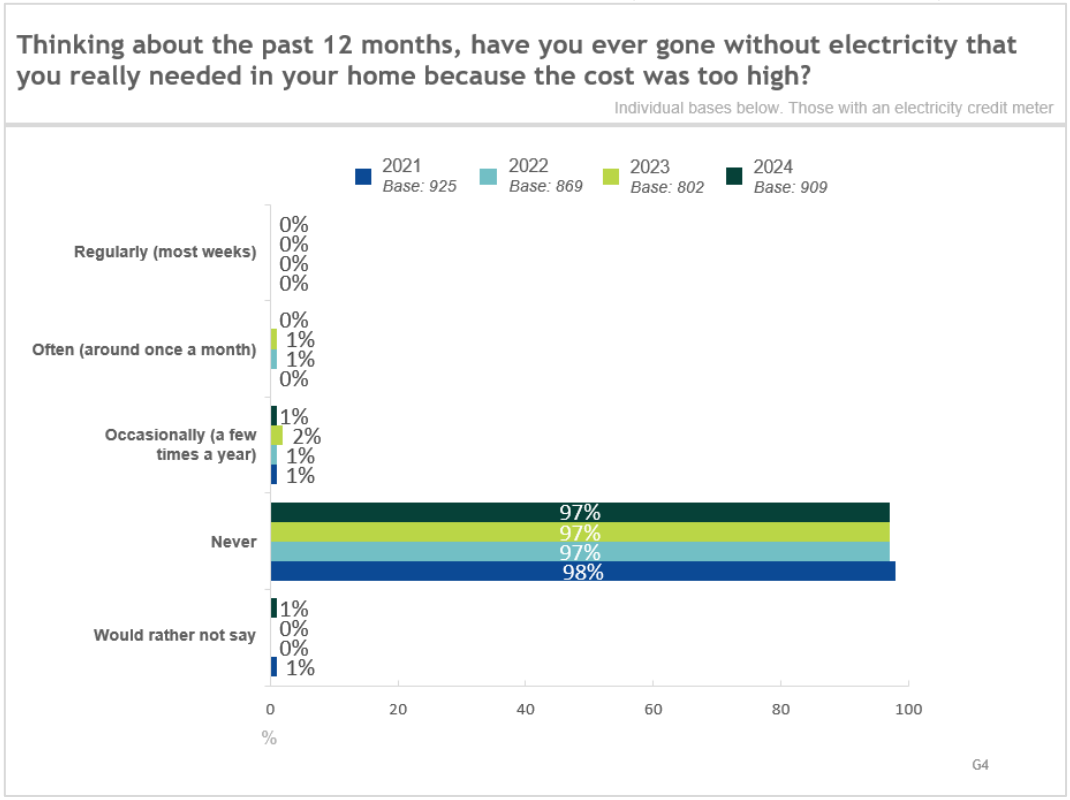
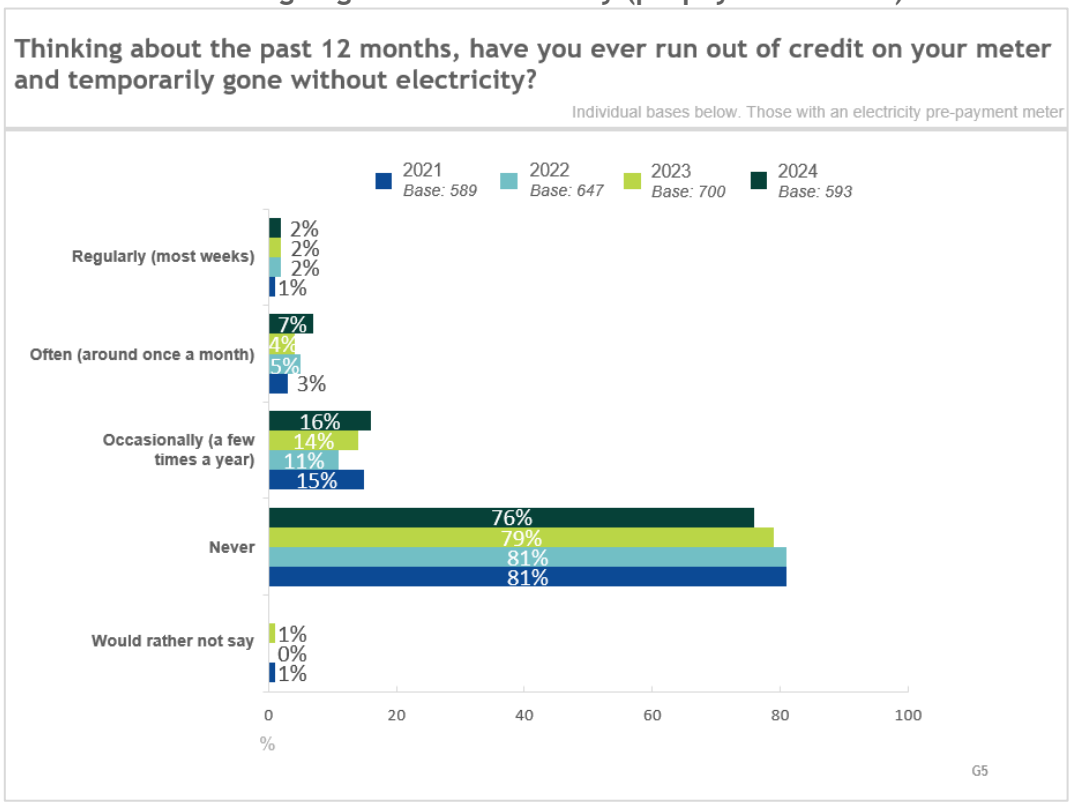
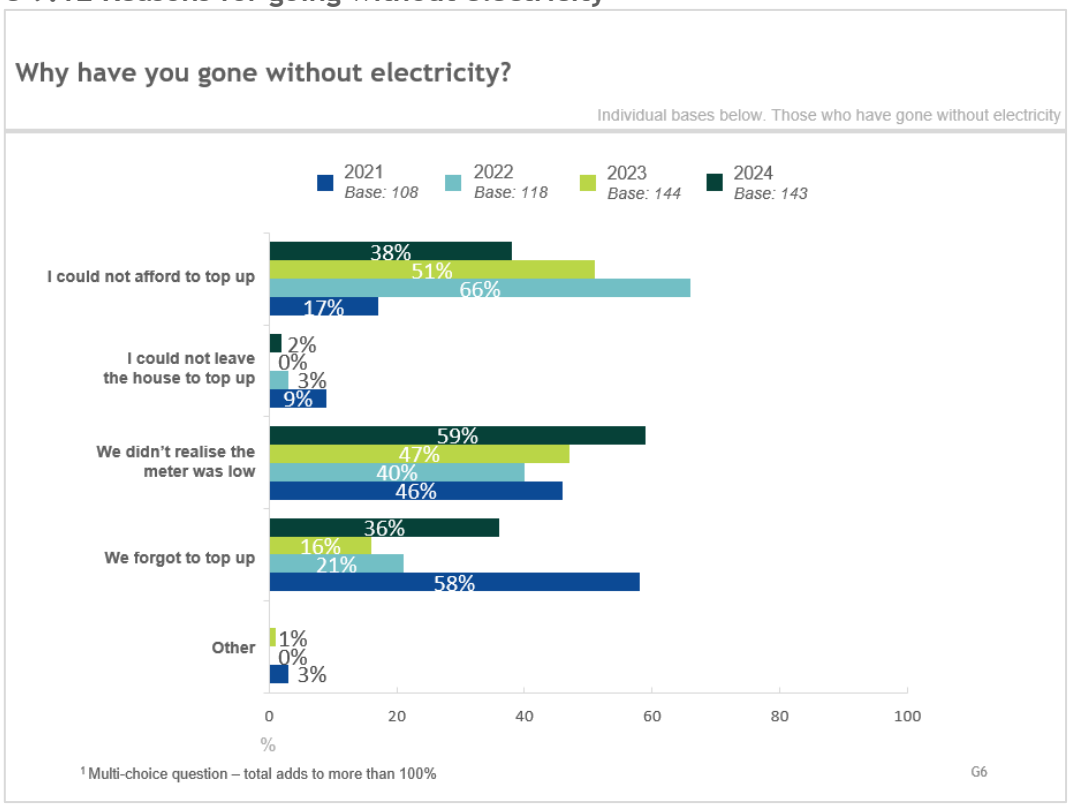


Figure 9.11 Incidence of going without electricity (prepayment meter)



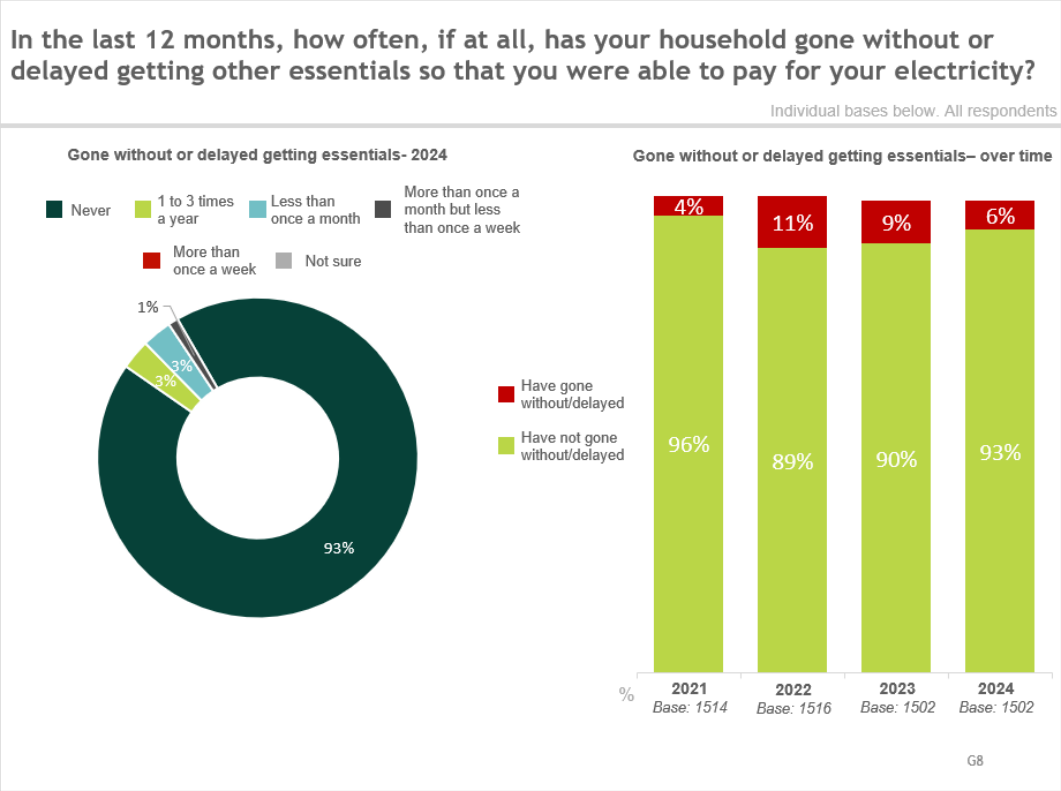
Of those respondents with a prepayment meter who had run out of credit on the meter and temporarily gone without electricity, 59% said that they did not realise the meter was low, while 38% stated that they could not afford to top up (see Figure 9.12).

Figure 9.12 Reasons for going without electricity



All respondents were asked if they had gone without or had delayed getting other essentials so that they would be able to pay for electricity. While the majority (93%) confirmed that this was not something they had to do, 3% reported that they had to do this between one and three times a year, and 3% had to do this less often than once a month but more than three times a year. A further 1% had to do this at least once a month (see Figure 9.13).

Figure 9.13 Incidence of delaying getting essentials to pay for electricity



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

- Respondents aged 18 to 34 (8%), 35 to 44 (9%), and 45 to 64 (7%) were more likely to say they had gone without essentials at least once than those aged 65 and over (4%);
- 11% of those in the C2DE group reported having to go without essentials at least once, compared to 2% in the ABC1 group;
- Those living in social housing (21%) were more likely to say they had delayed getting essentials than those who privately rent (10%) and who own their home (4%);
- Respondents living in the most deprived areas (15%) were more likely to have delayed getting essentials than those in the least deprived areas (3%);
- 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, compared to 4% of those who do not have someone with a disability or illness in their household;
- Respondents who have children in their household (9%) were more likely than those without (5%) to say they had delayed getting essentials;
- Those who would be considered to be in the high or medium vulnerability group (9%) were more likely to have delayed getting essentials to pay for electricity than those who are not considered vulnerable (4%);

- Respondents who have a prepayment meter for electricity (12%) were more likely than credit customers (3%) to report they had gone without essentials in the past 12 months;
- 11% of electricity switchers stated they had gone without essentials, compared to 4% of non-switchers; and
- 38% of those respondents who had self-disconnected from their electricity supply reported they had delayed or gone without essentials in the past 12 months to get electricity. This compares to 3% of those who had not self-disconnected from their supply in the last 12 months.

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

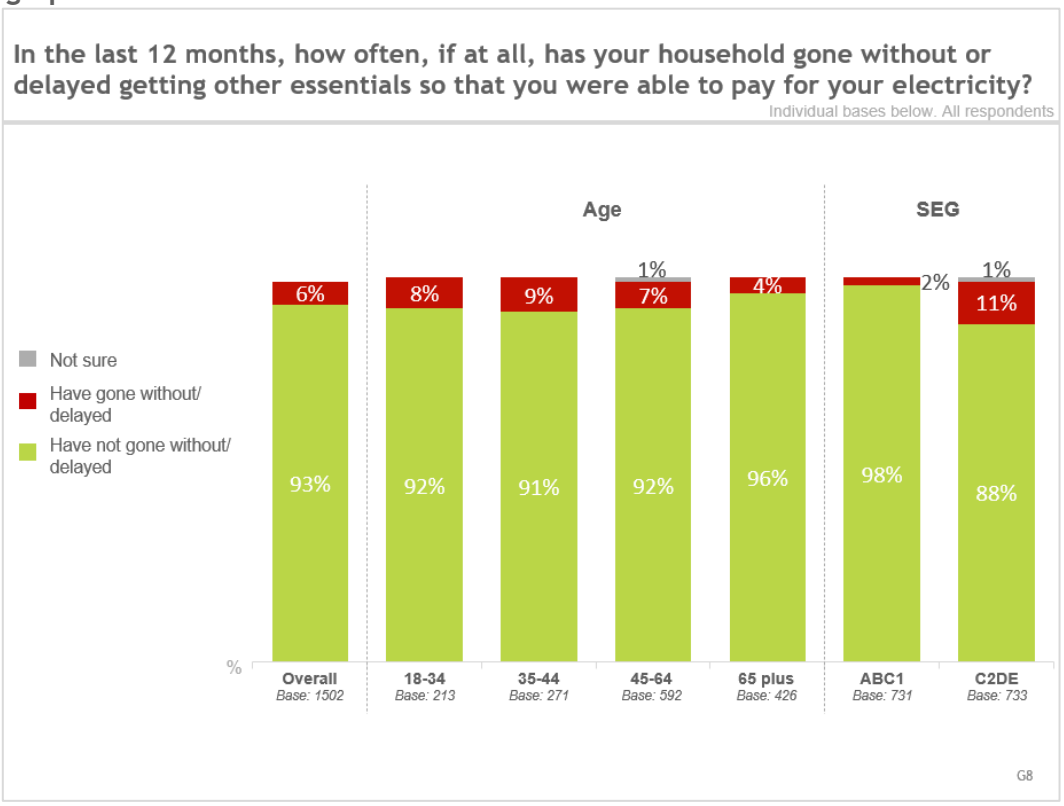


Figure 9.15 Incidence of delaying getting essentials to pay for electricity by tenure and deprivation

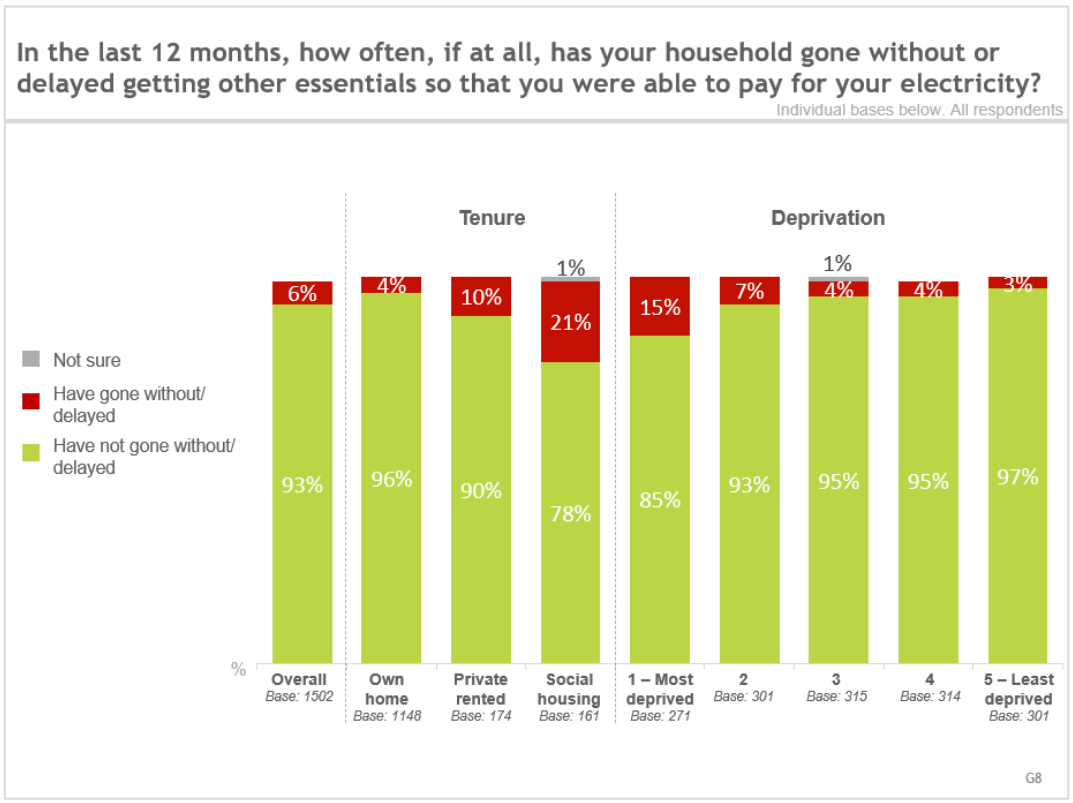


Figure 9.16 Incidence of delaying getting essentials to pay for electricity by disability/illness, children, and vulnerability

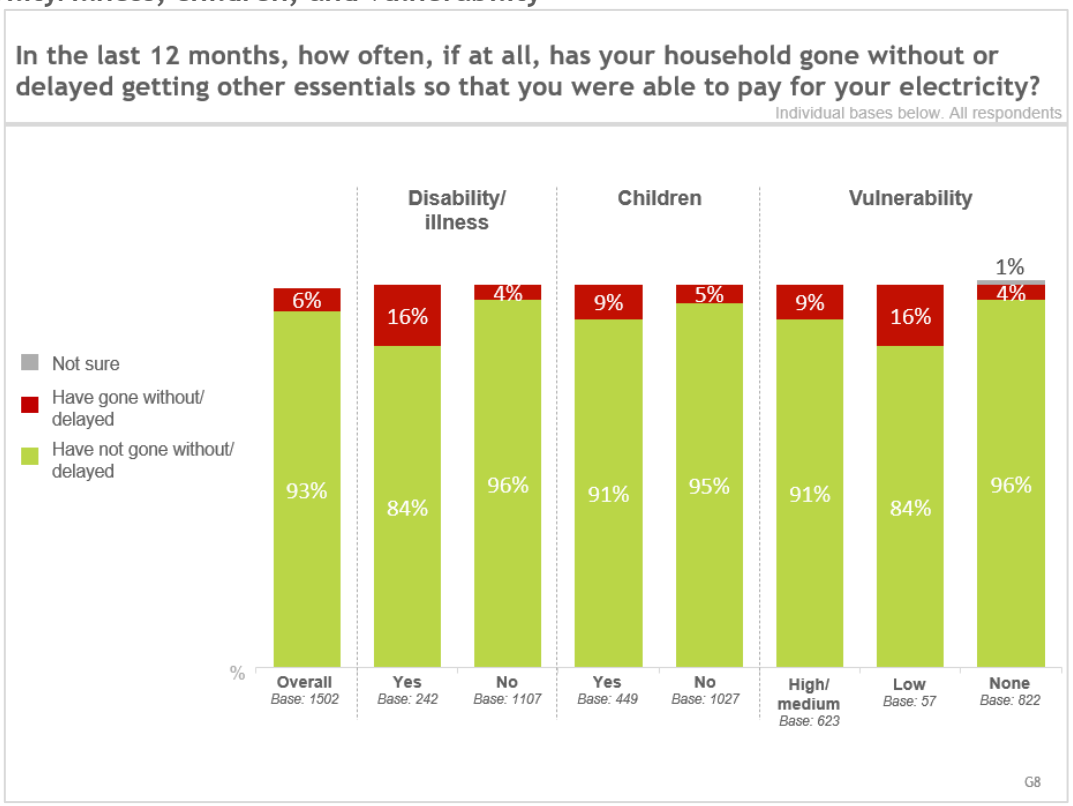
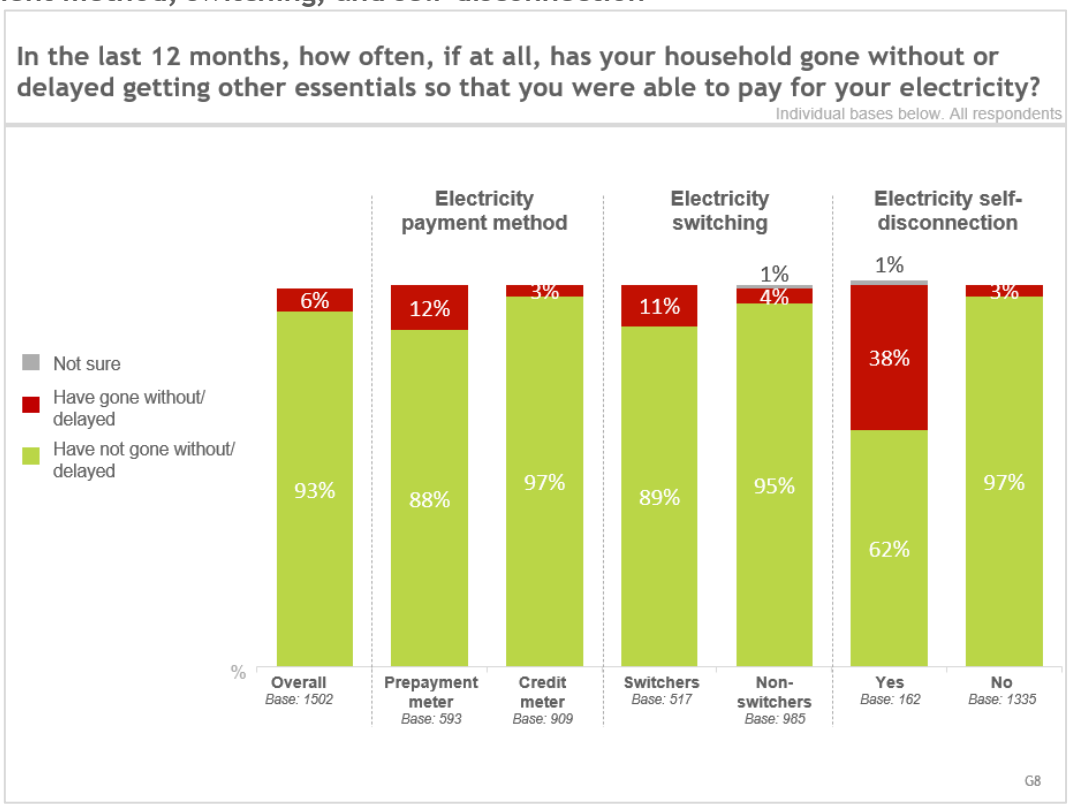
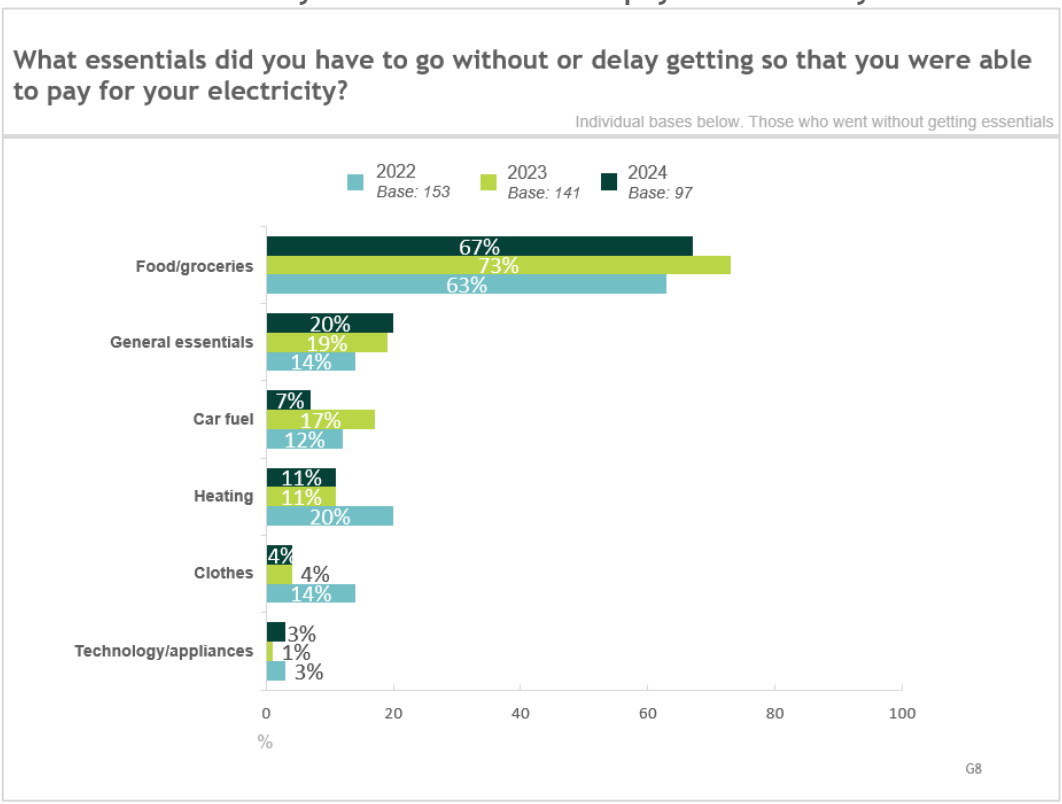


Figure 9.17 Incidence of delaying getting essentials to pay for electricity by electricity payment method, switching, and self-disconnection



Of those who had reported going without essentials, 67% said they had not bought food or groceries, while 20% did not pay for general essentials. A further 11% went without heating, and 7% went without car fuel (see Figure 9.18).

Figure 9.18 Essentials delayed or went without to pay for electricity



Gas

Of those with a gas credit meter, 4% revealed that they have had to occasionally go without gas in the past 12 months because the cost was too high, with a further 1% saying they often or regularly had to do this (see Figure 9.19). Of those who have a gas prepayment meter, 17% reported having occasionally run out of credit, while 8% had done this often or regularly (see Figure 9.20).

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

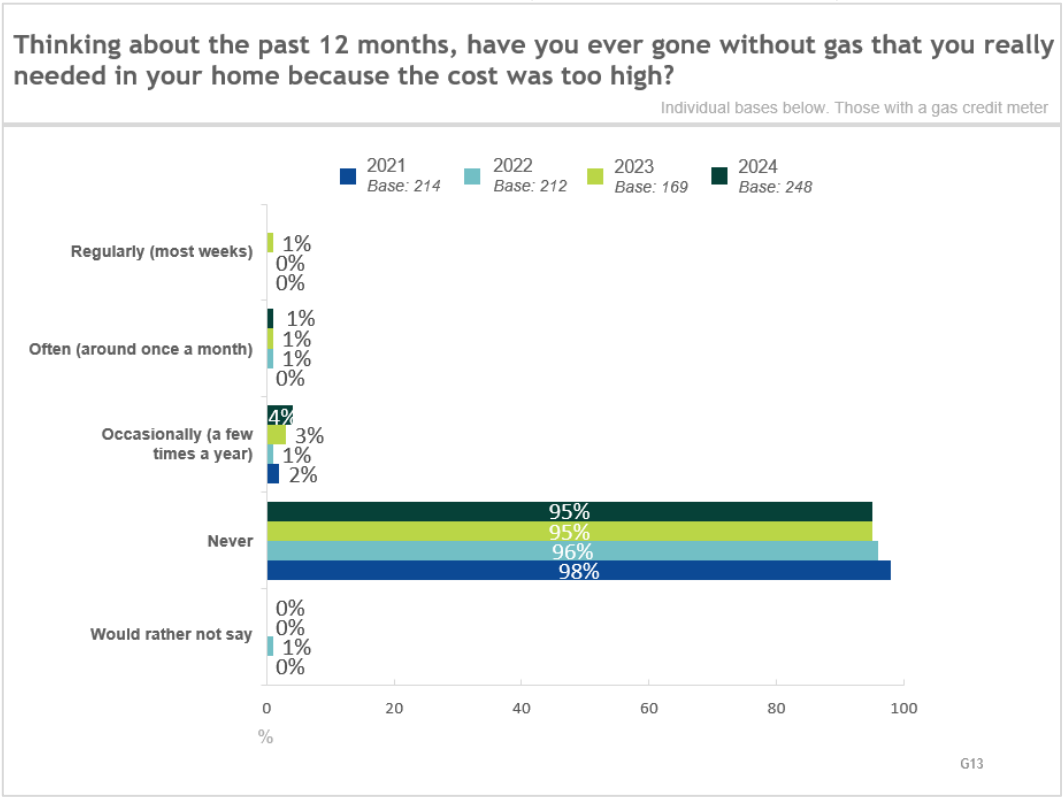
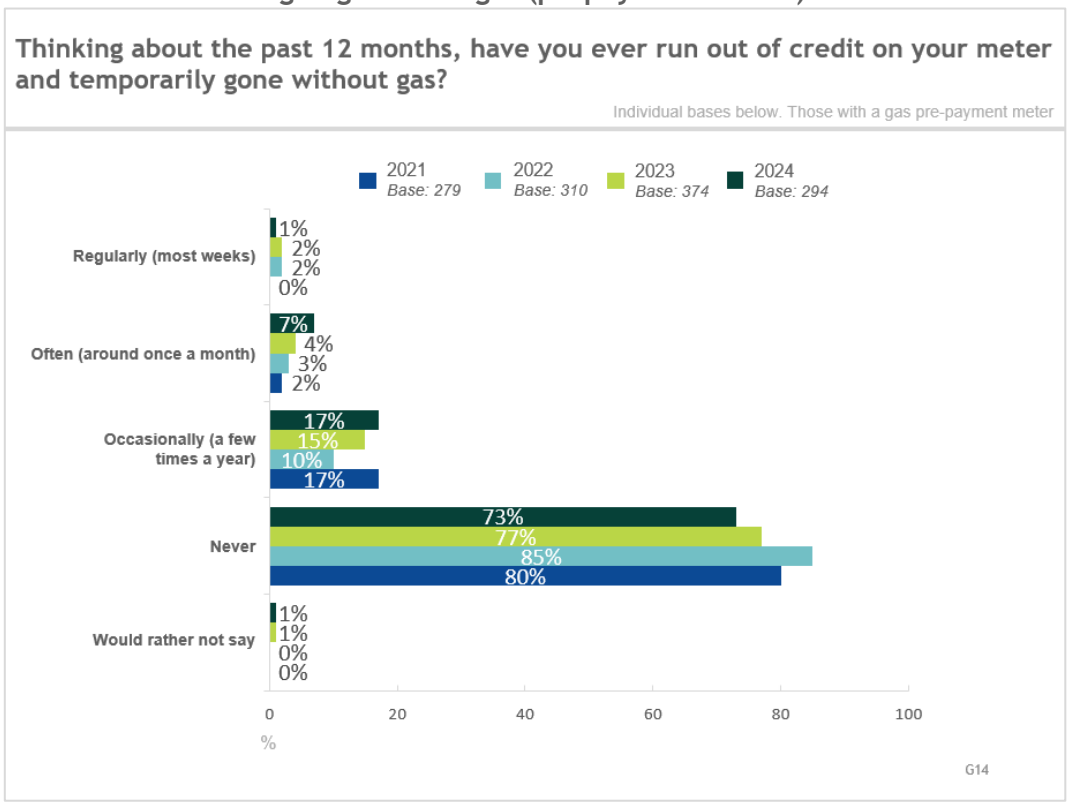
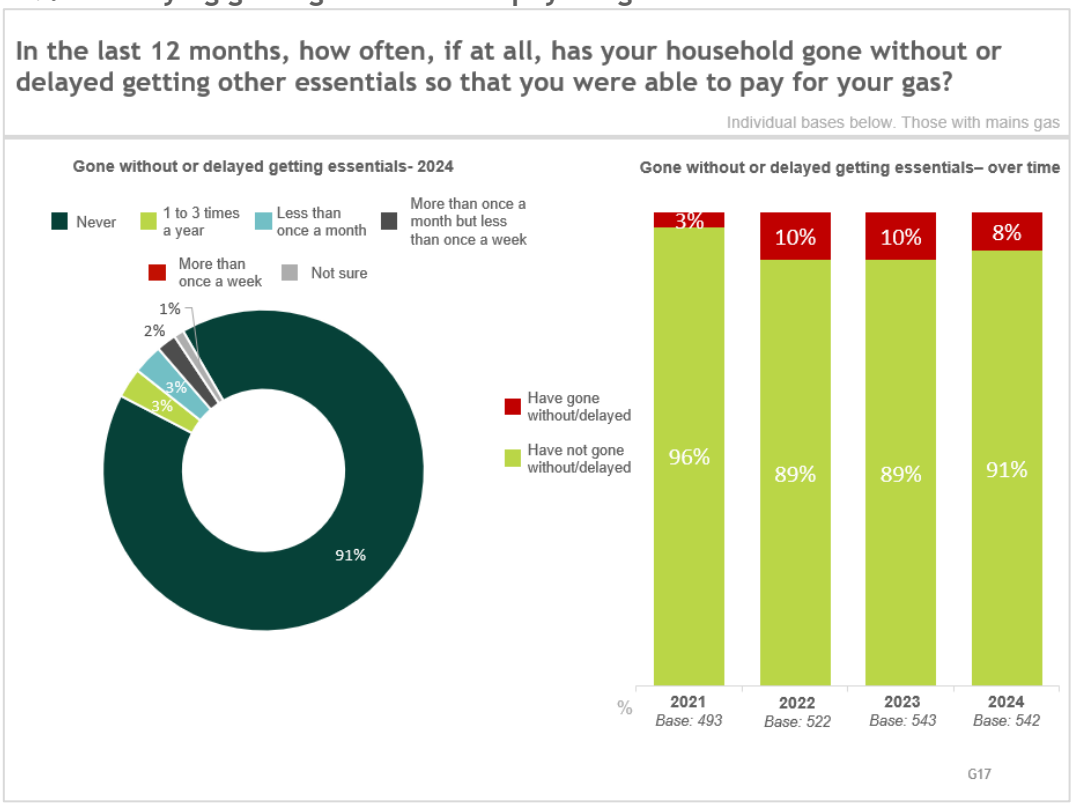


Figure 9.20 Incidence of going without gas (prepayment meter)



Those with mains gas were asked how often their household had gone without or delayed getting other essentials so that they could pay for their gas. 8% confirmed that this was the case for them on at least one occasion in the last 12 months (see Figure 9.21).

Figure 9.21 Delaying getting essentials to pay for gas



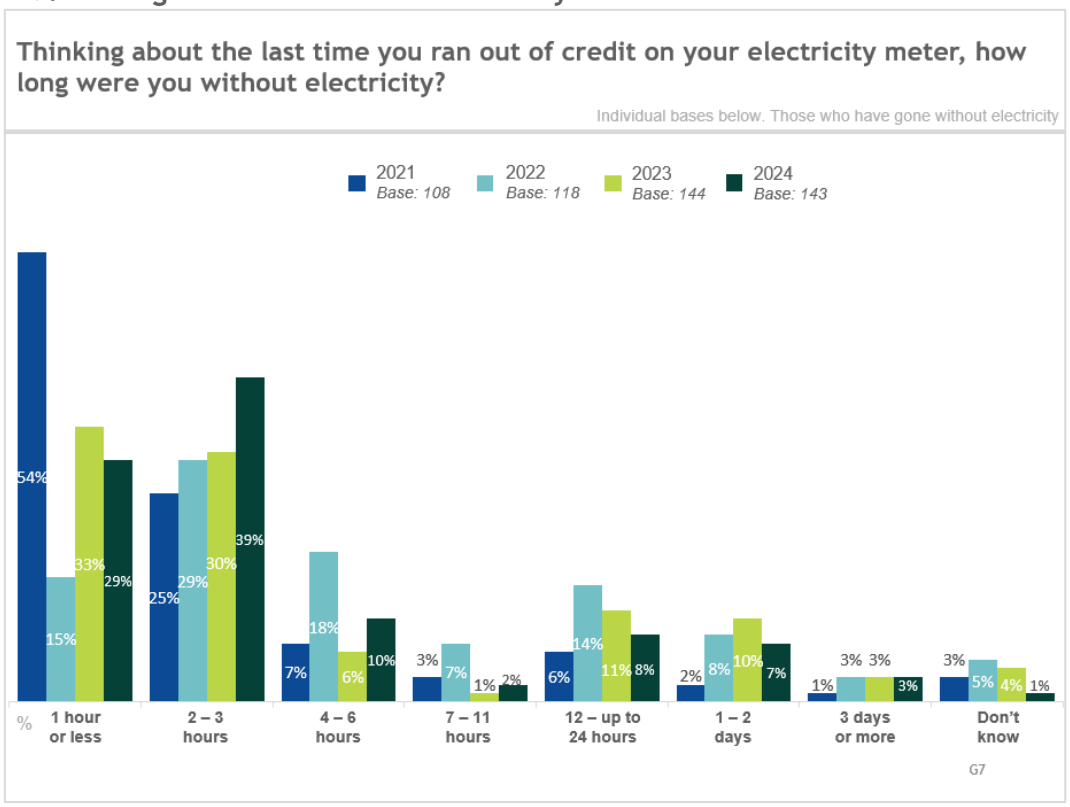
Length of time without energy

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

Electricity

89% of respondents who ran out of credit on their electricity meter reported that their supply was restored on the same day, including 29% who were without their electricity for up to one hour. However, 11% stated that they were without electricity for longer than a day (see Figure 9.22).

Figure 9.22 Length of time without electricity



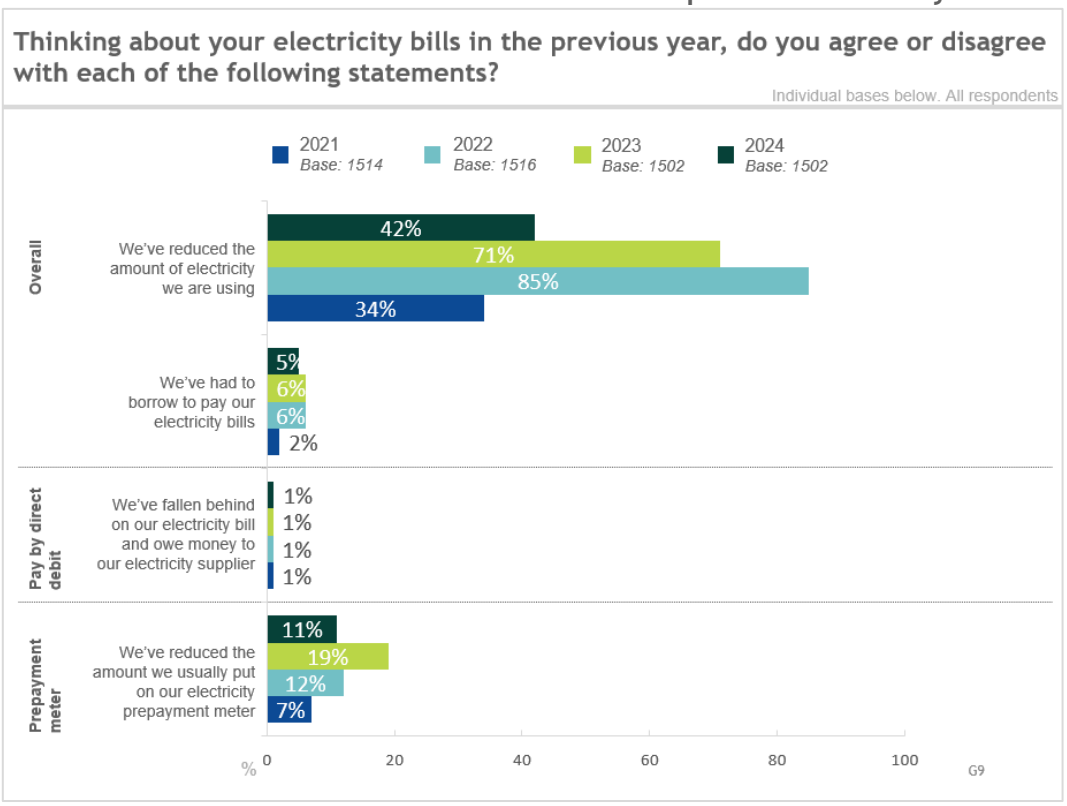
Methods to reduce spend on energy

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

Electricity

Two in five (42%) respondents reported that they had reduced the amount of electricity they were using in the previous year (down from 71% in 2023), while 5% stated that they have had to borrow money to pay their electricity bills. 1% of those who pay their electricity bill by direct debit reported that they had fallen behind on their bills and owe money to their supplier. 11% of respondents with an electricity prepayment meter stated that they had reduced the amount they usually put on their meter.

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



Several subgroups were significantly more likely to have reduced their electricity usage than others (see Figures 9.24 to 9.27):

- 43% of those aged 18 to 34, 43% aged 35 to 44, and 48% aged 45 to 64 said they had reduced their electricity usage, compared with 34% aged 65 and over;
- Respondents in the C2DE group (49%) were more likely to have reduced their electricity usage than those in the ABC1 group (35%);
- Those who do not consider themselves to be confident internet users (48%) were more likely to have reduced their electricity usage than those who are confident users (39%);
- Those who live in social housing (58%) and who privately rent (53%) were more likely to report they reduced the amount of electricity they are using than those who own their home (38%);
- 55% of those living in the most deprived areas say they had reduced their electricity usage, compared to 38% in the least deprived areas;
- Respondents who have someone in their household with a disability or illness (55%) were more likely to have reduced their electricity usage than those who do not have someone with a disability or illness in the household (38%);
- Those in the high or medium vulnerability group (45%) were more likely to report that they reduced their electricity usage than those who are not considered vulnerable (39%);
- Under half (48%) of those who have an electricity prepayment meter said they reduced the amount of electricity they use, compared to 38% of those on a credit meter;
- Electricity switchers (49%) were more likely than non-switchers (38%) to have reduced their electricity usage; and
- Four in five (80%) of those who had self-disconnected from their electricity supply said they had reduced their electricity usage, compared to 38% who had not self-disconnected.

Figure 9.24 Reducing electricity usage by demographics and confidence using the internet

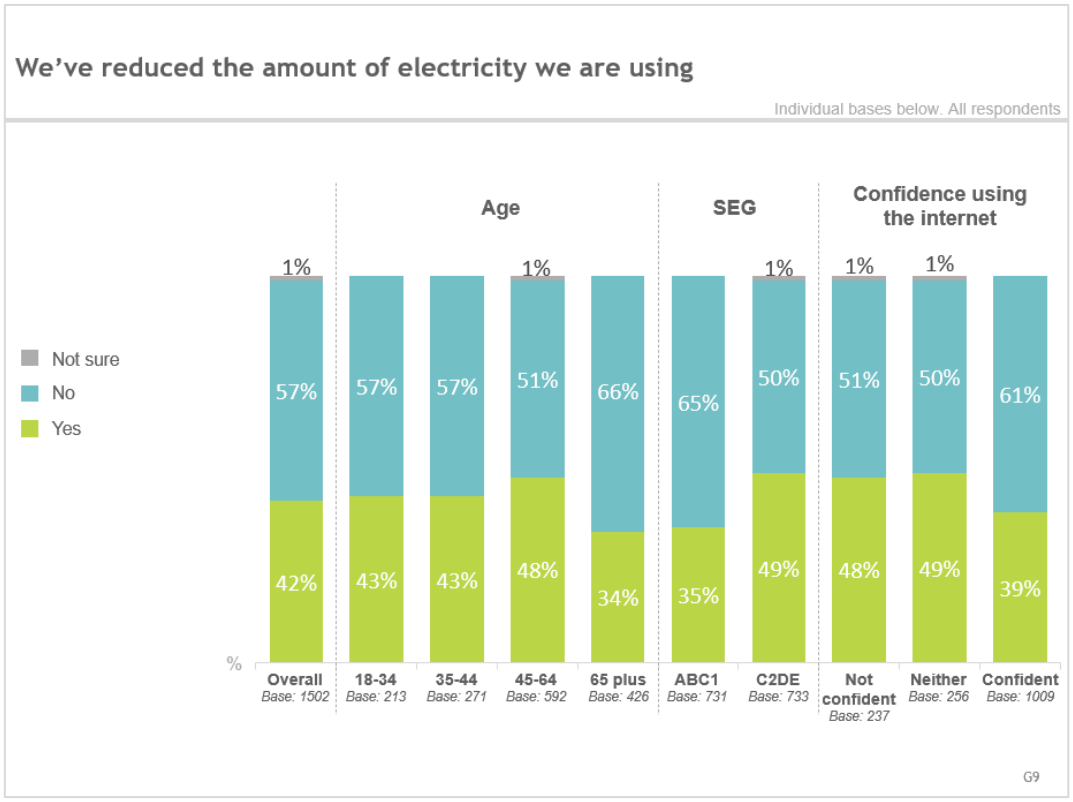


Figure 9.25 Reducing electricity usage by tenure and deprivation

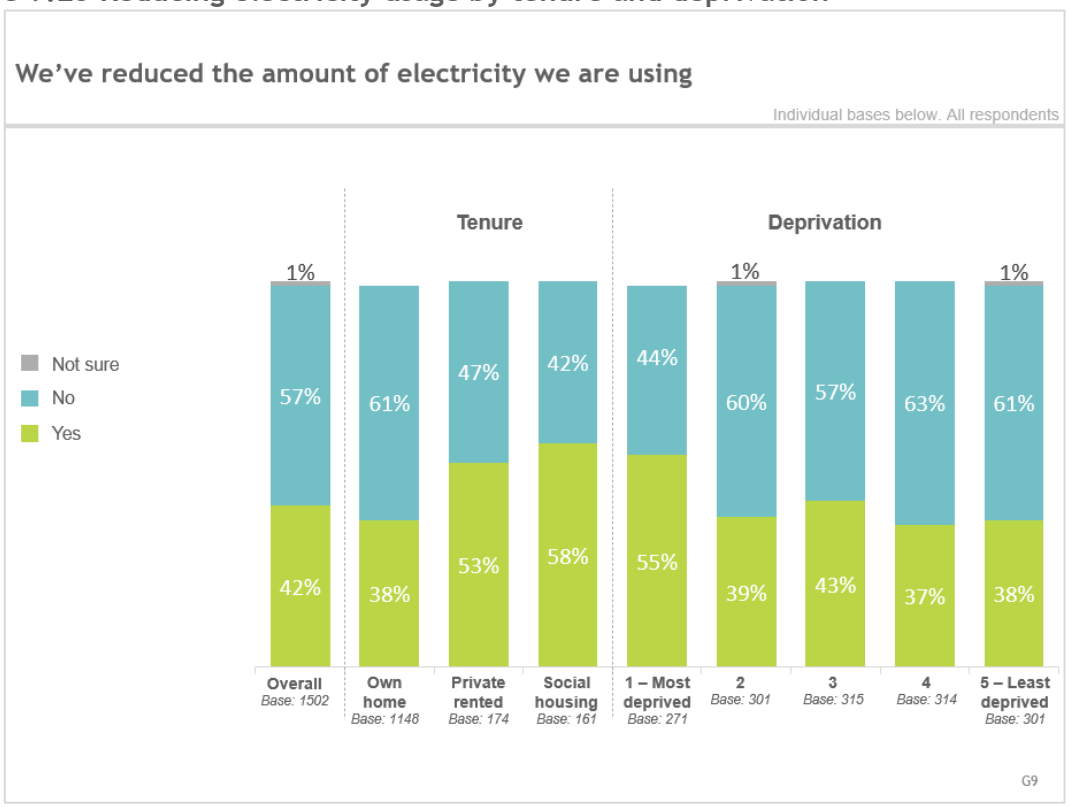


Figure 9.26 Reducing electricity usage by disability/illness and vulnerability

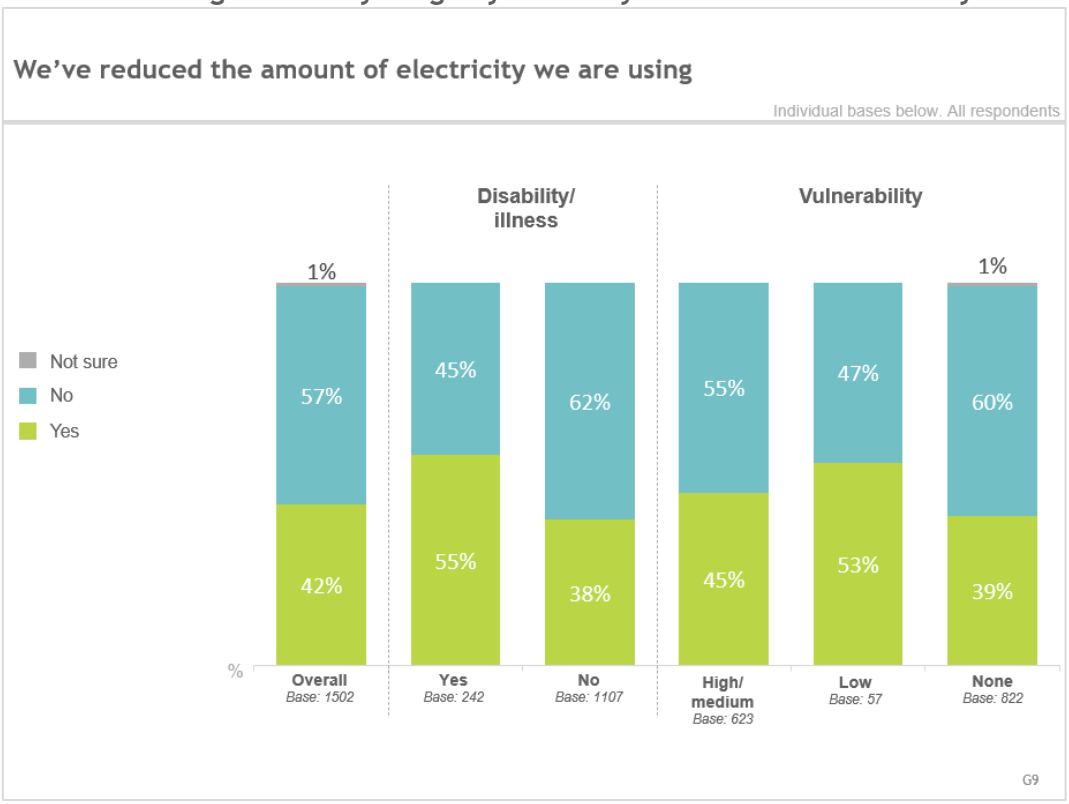
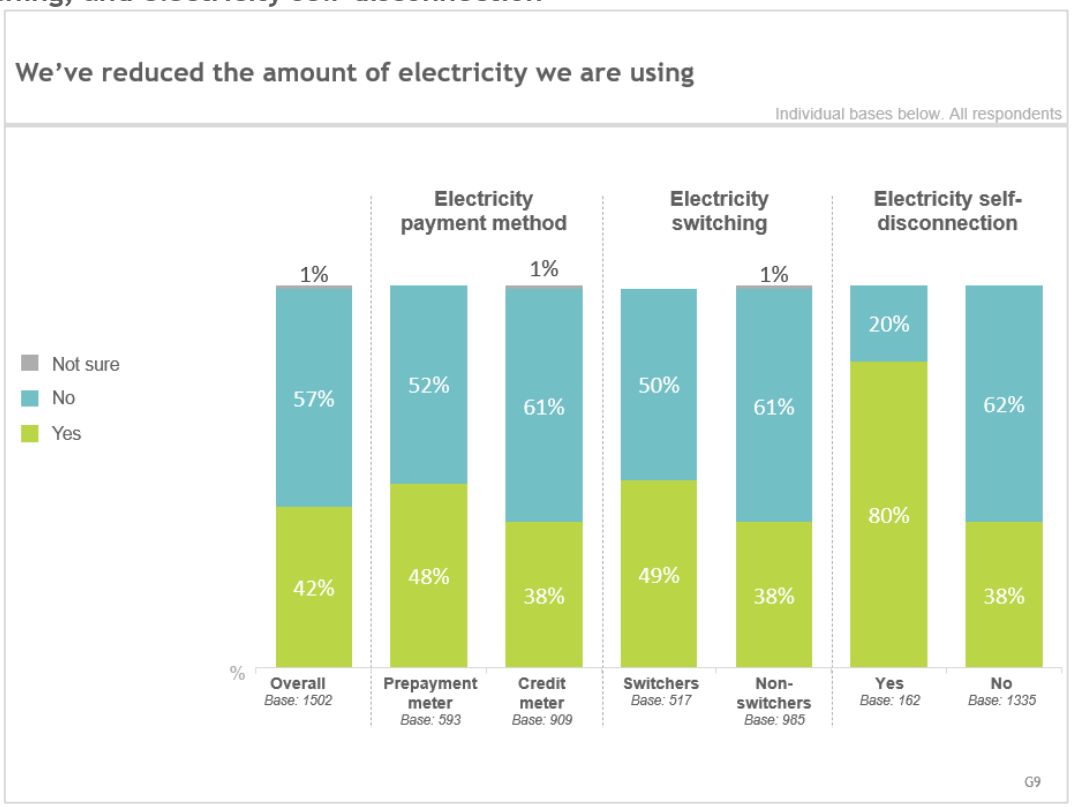


Figure 9.27 Reducing electricity usage by electricity payment method, electricity switching, and electricity self-disconnection



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

- Respondents aged 65 and over (2%) were less likely than all other age groups to say they had borrowed money to pay their electricity bills (8% aged 18 to 34, 5% aged 35 to 44, and 6% aged 45 to 64);
- Those in the C2DE group (8%) were more likely than those in the ABC1 group (2%) to report having borrowed money to pay their electricity bills;
- Respondents who live in social housing (15%) and who privately rent (8%) were more likely than those who own their home (3%) to say they had borrowed money to cover their electricity bills;
- Those living in the most deprived areas (13%) were more likely to state they had borrowed money for their electricity bills than those in the least deprived areas (2%);
- 13% of those who have or live with someone who has a disability or illness had borrowed money to pay their electricity bills, compared to 3% who do not have or live with someone who has a disability or illness;
- Those who have children in their household (7%) were more likely than those without children (4%) to say they had borrowed money for their electricity bills;
- 6% of those in the high or medium vulnerability group said they had to borrow to pay their bills, compared to 3% who are not considered to be vulnerable;
- Respondents who have a prepayment meter for electricity (9%) were more likely to report borrowing money for their electricity bills than those on a credit meter (2%);
- Electricity switchers (7%) were more likely to say they borrowed to pay their electricity bills than non-switchers (4%);
- 30% of respondents who had self-disconnected from their electricity supply said they had to borrow money to cover their electricity bills, compared to 2% who had not self-disconnected.

Figure 9.28 Borrowing money to pay electricity bills by demographics

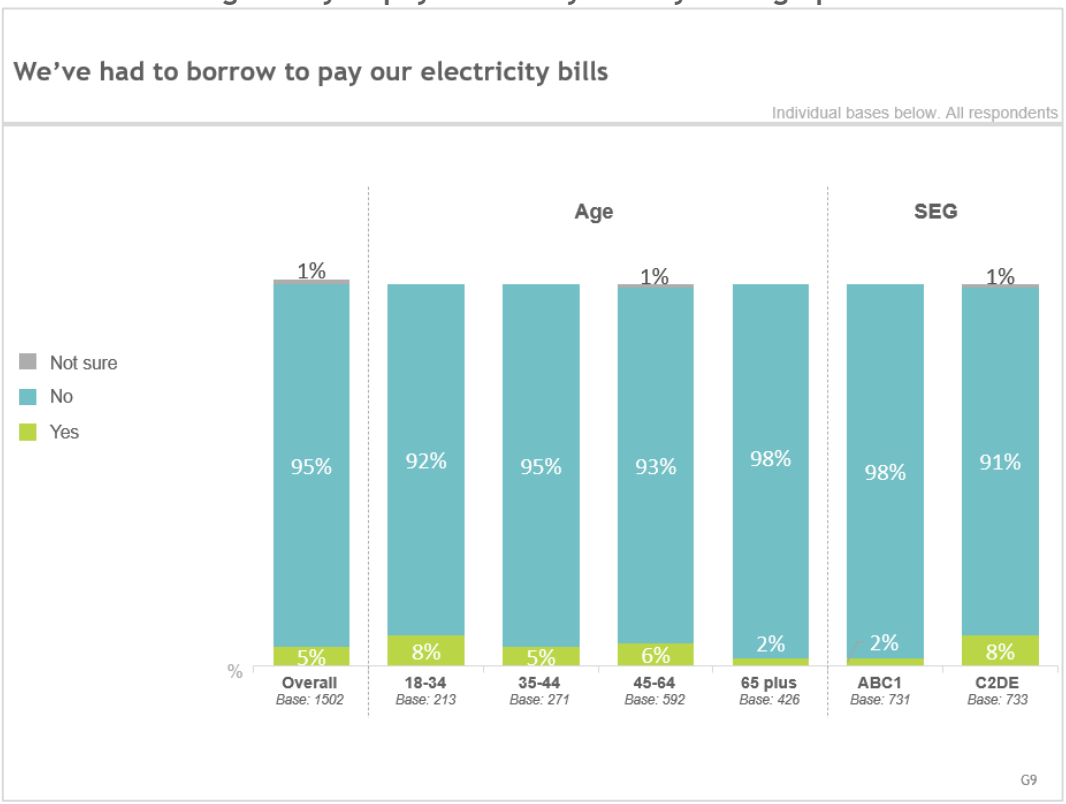


Figure 9.29 Borrowing money to pay electricity bills by tenure and deprivation

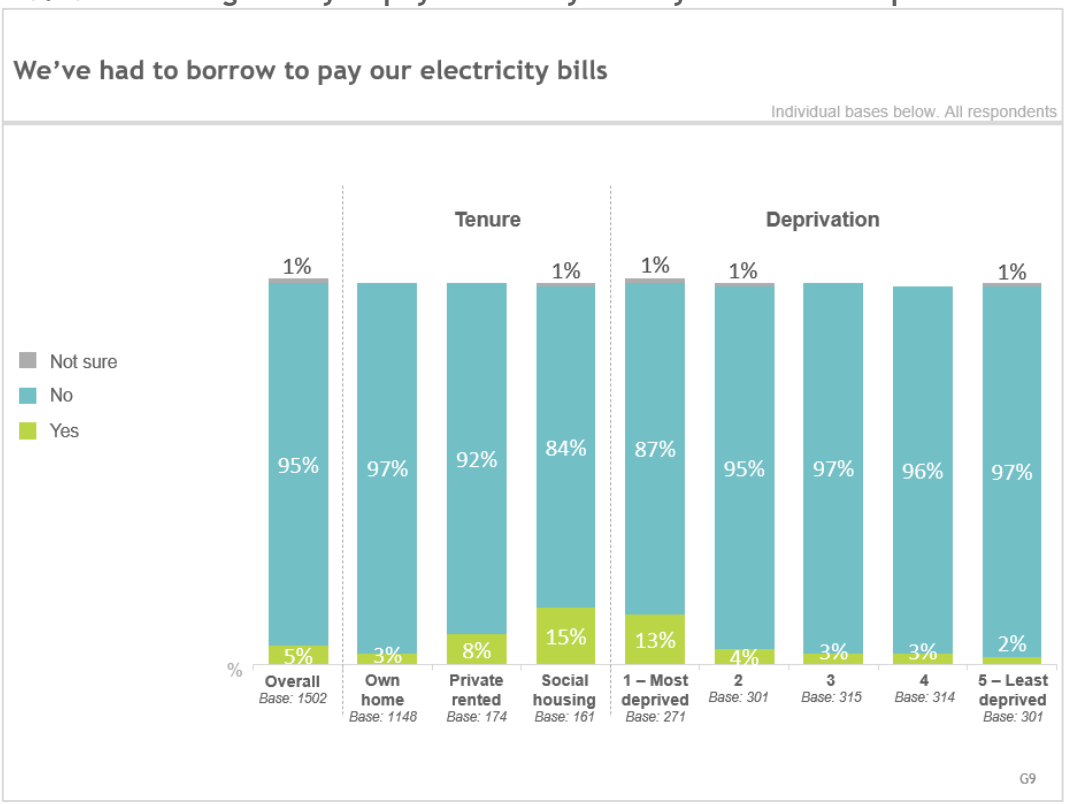


Figure 9.30 Borrowing money to pay electricity bills by disability/illness, children, and vulnerability

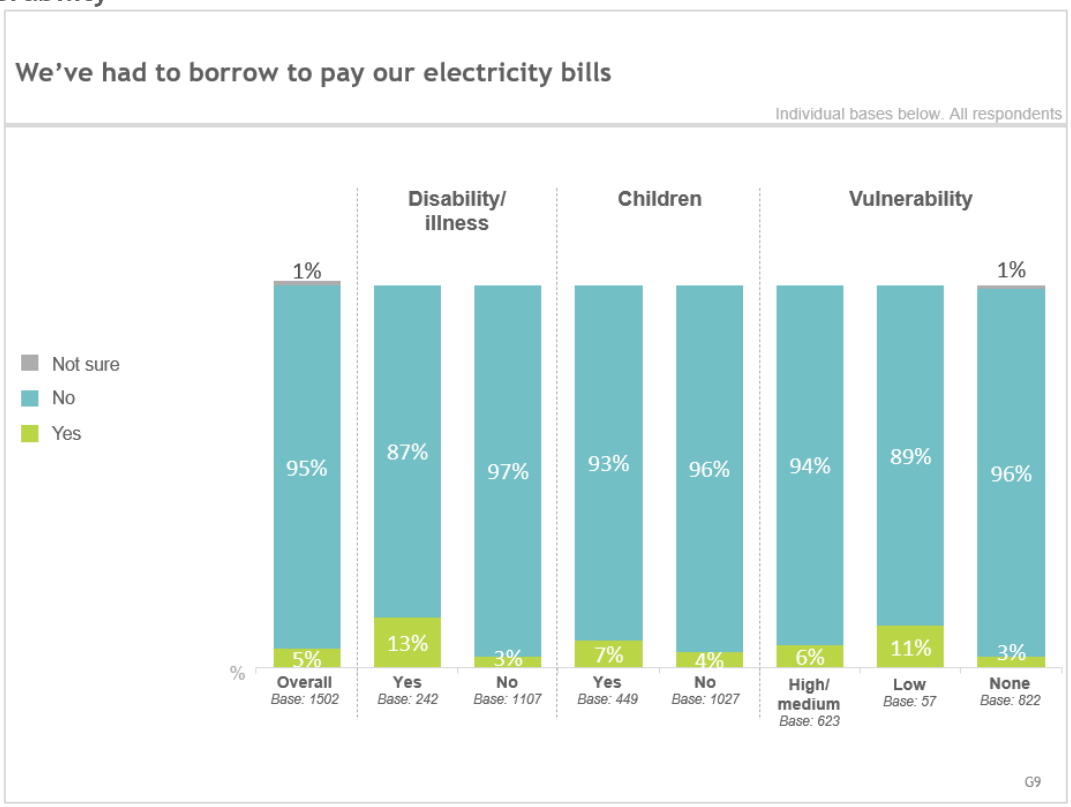
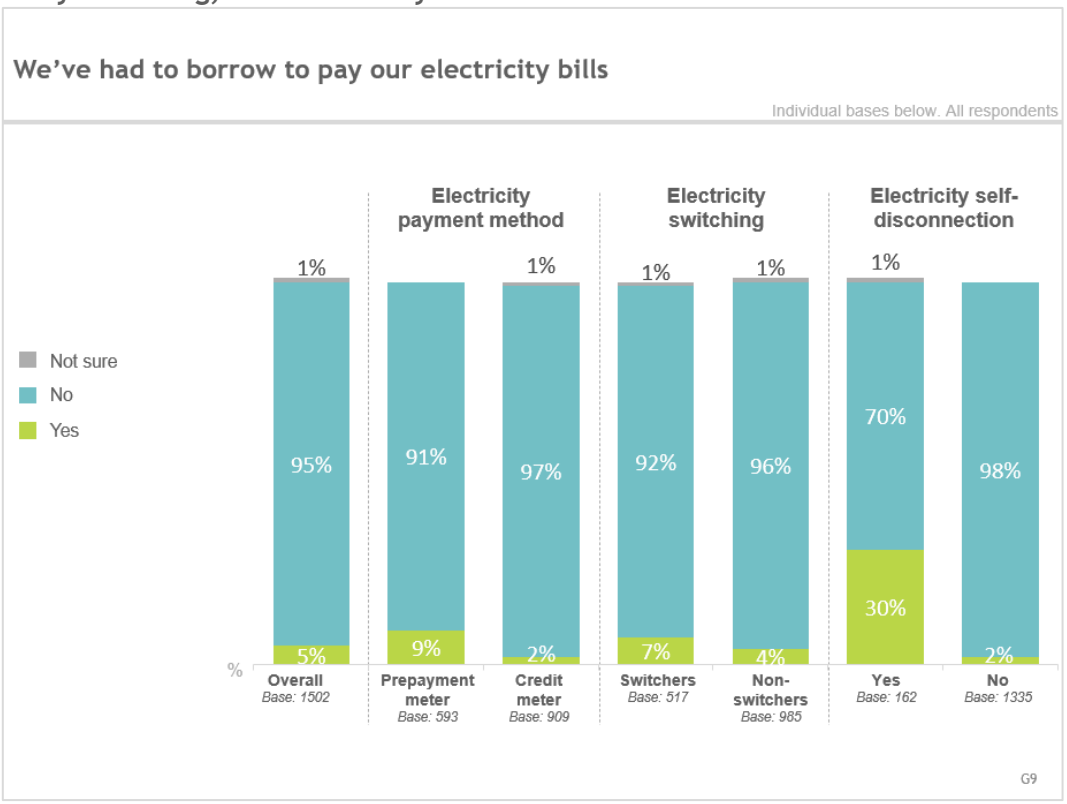


Figure 9.31 Borrowing money to pay electricity bills by electricity payment method, electricity switching, and electricity self-disconnection

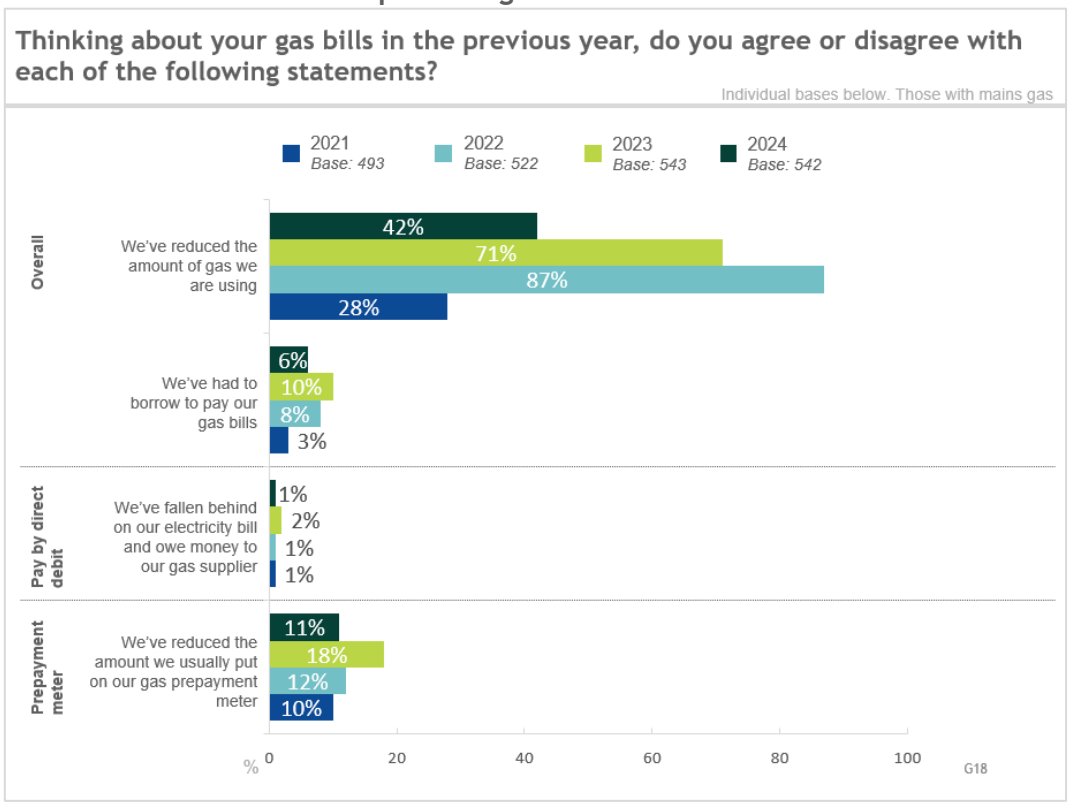


Gas

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

42% of gas customers stated that they had reduced the amount of gas they were using last year, compared to 71% who said they had done this in the 2023 Tracker. 6% reported that they had to borrow to cover their gas bills, down from 10% in 2023. 1% of customers with direct debit for their gas bills said they owe money to their supplier. 11% of those with a gas prepayment meter revealed that they have reduced the amount they usually put on their meter (see Figure 9.32).

Figure 9.32 Methods to reduce spend on gas bill



The following significant differences were observed (see Figures 9.33 and 9.34):

- Gas customers in the C2DE group (49%) were more likely to report reducing their gas usage than those in the ABC1 group (35%);
- Those who live in social housing (57%) were more likely to have reduced their gas usage than those who own their home (39%) and who privately rent (37%);
- 53% of those who have someone in their household with a disability or illness stated they had reduced their gas usage, in comparison with 39% without someone in their household with a disability or illness;
- Those who have a prepayment meter for gas (46%) and who have self-disconnected from their gas supply (74%) were more likely to say they reduced their gas usage than those on a credit meter (38%) and who have not self-disconnected (36%).

Figure 9.33 Reducing electricity usage by SEG, tenure, and disability/illness

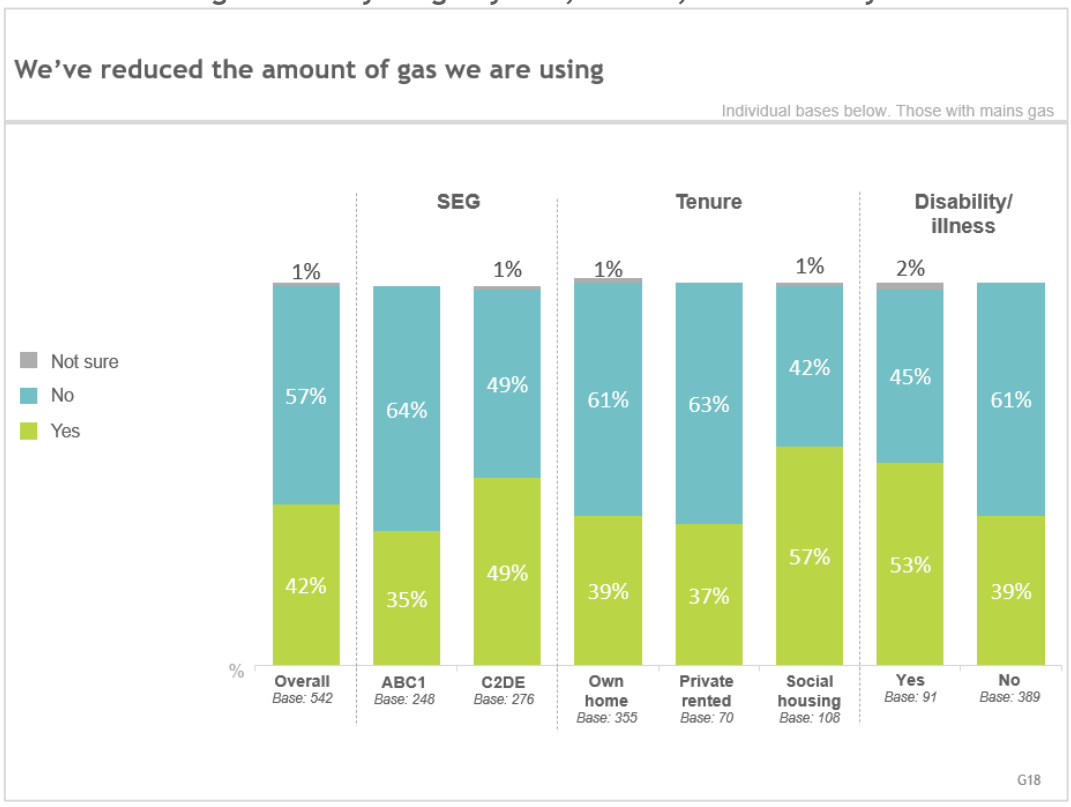
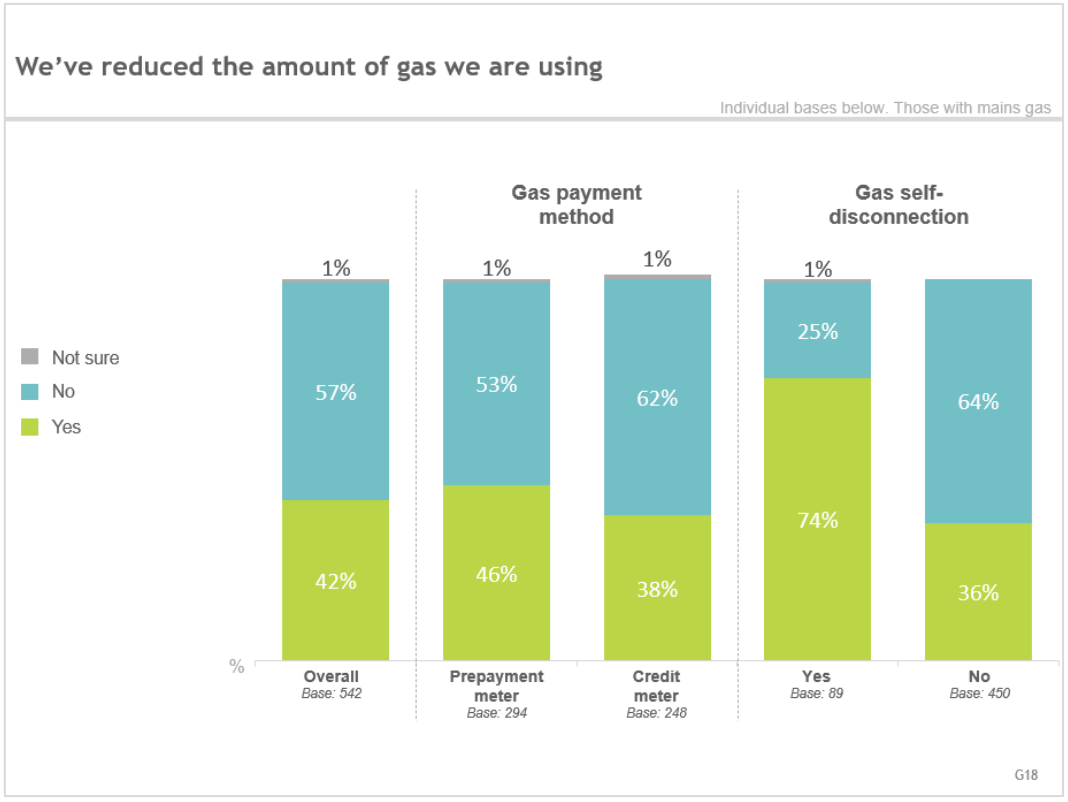


Figure 9.34 Reducing electricity usage by gas payment method and gas self-disconnection



Subgroup analysis also revealed the following differences between those who had to borrow money to pay for their gas bills (see Figures 3.35 to 3.37):

- Respondents aged 18 to 34 (8%), 35 to 44 (7%), and 45 to 64 (8%) were more likely to have said they borrowed money to pay their gas bills than those aged 65 and over (1%);
- Those in the C2DE group (10%) were more likely than those in the ABC1 group (2%) to say they had borrowed money for their gas bills;
- Those who live in social housing (18%) and who privately rent (7%) were more likely to state that they had borrowed money than those who own their home (2%);
- Respondents who have or live with someone who has a disability or illness (14%) were more likely to have borrowed money than those who do not have someone with a disability or illness in their household (3%); and
- 10% of respondents who have children in their household reported having to borrow money to pay their gas bills, compared to 4% without children; and
- Respondents who have a prepayment meter for gas (9%) and those who self-disconnected from their gas supply (28%) were more likely to report they had to borrow to pay their gas bills than those on a credit meter (3%) and those who had not self-disconnected (2%).

Figure 9.35 Borrowing money to pay gas bills by demographics

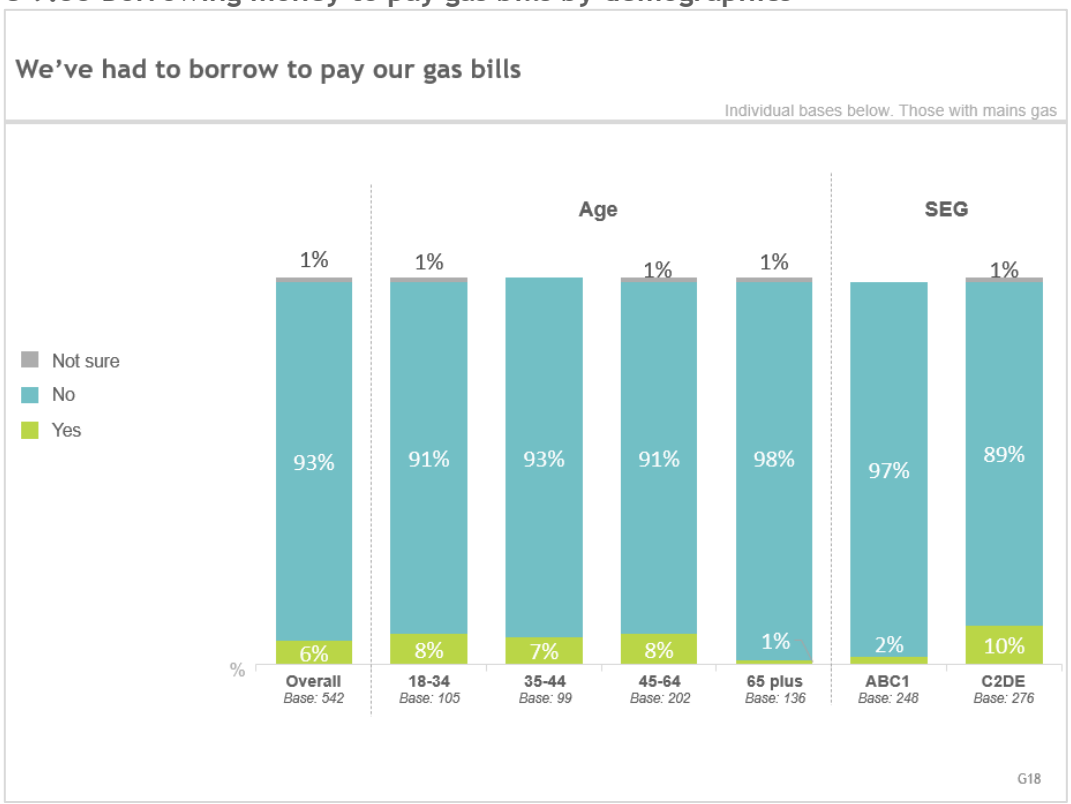


Figure 9.36 Borrowing money to pay gas bills by tenure, disability/illness, and children

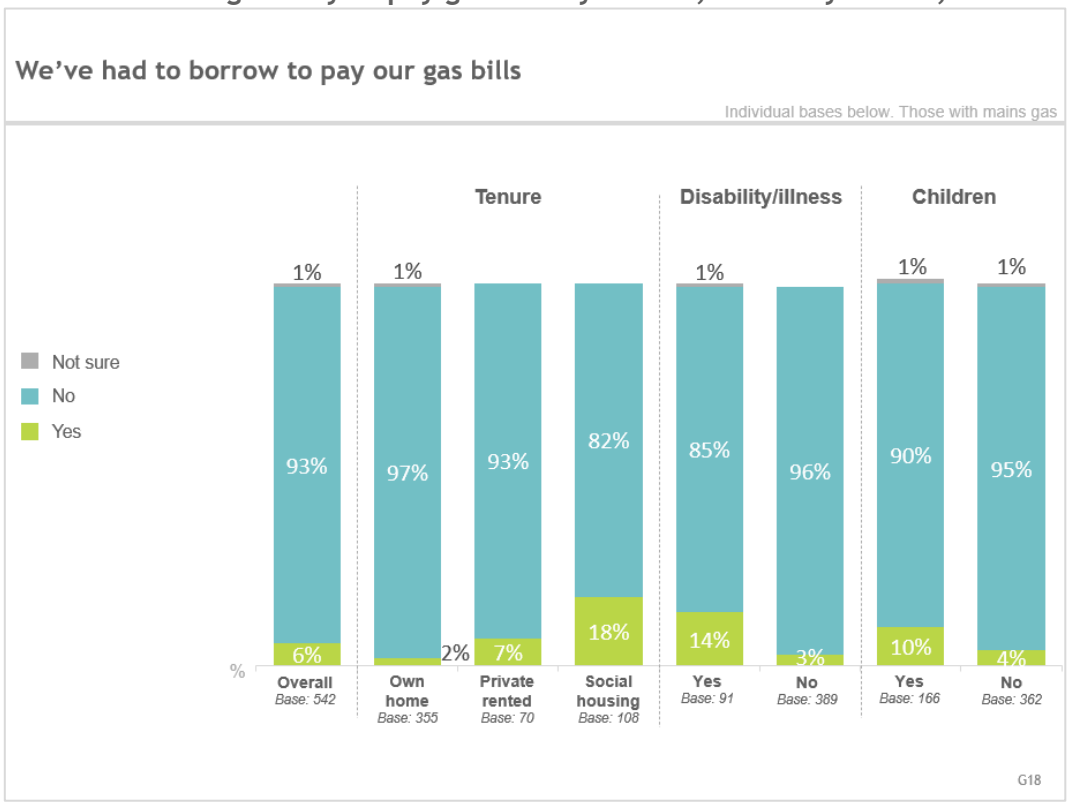
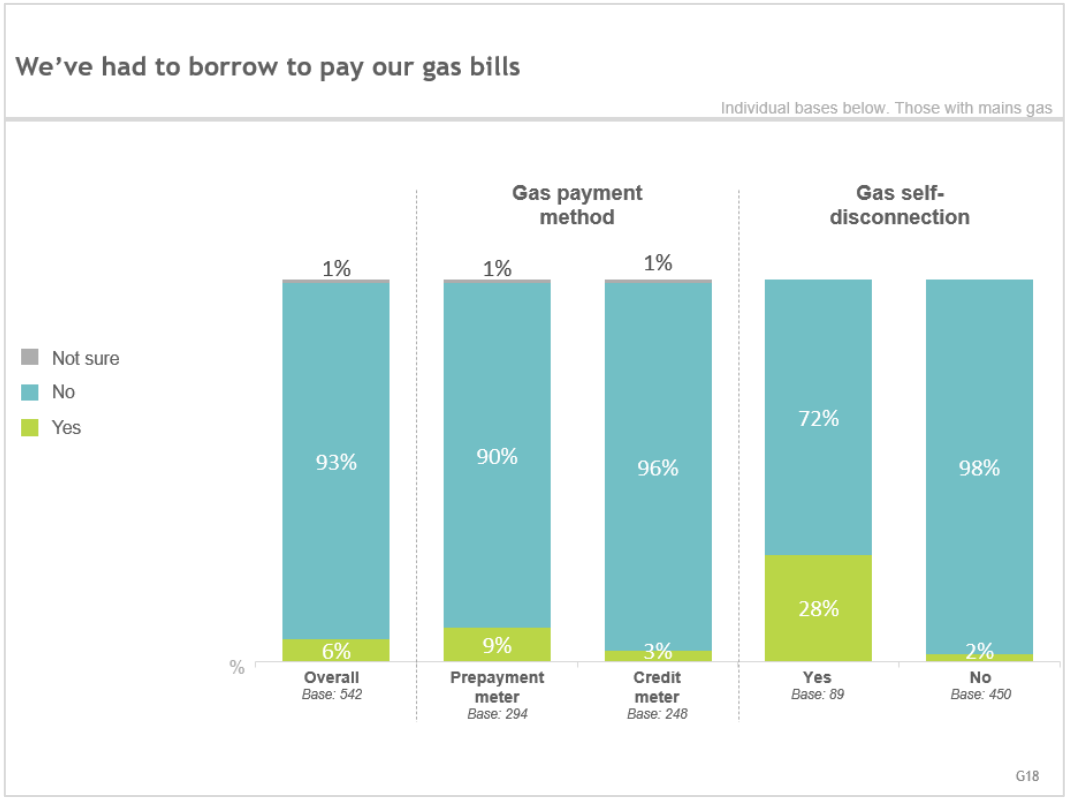


Figure 9.37 Borrowing money to pay gas bills by gas payment method and gas self-disconnection



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10. Consumer protections

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

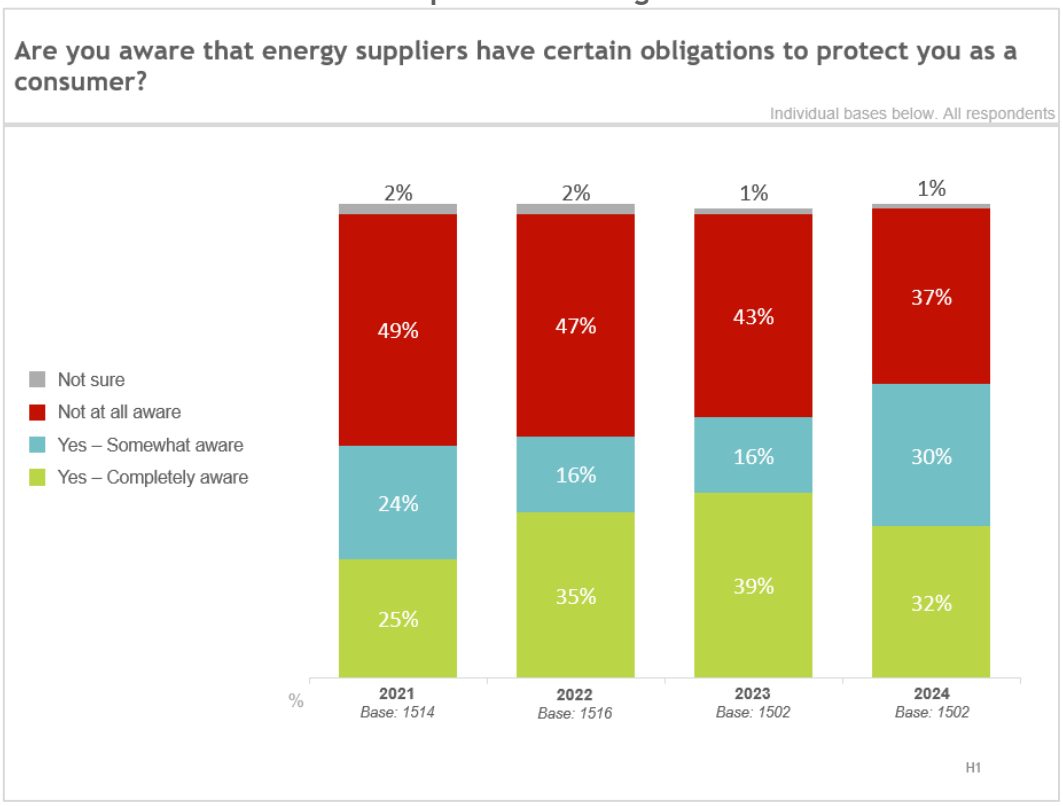
Key findings

- Awareness of consumer protections has increased across the Trackers, with 61% indicating awareness in 2024 compared to 55% in 2023, 51% in 2022, and 49% in 2021.
  - However, the proportion who are completely aware has decreased from 39% in the previous Tracker to 32% in 2024.
  - Respondents living in social housing (47%) and who privately rent (43%) were less likely to be aware of these protections, as were those who have a prepayment meter for electricity (43%) and for gas (41%) and who had self-disconnected from their electricity supply (46%).
- Three quarters (76%) 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, compared to 80% in 2023.
- Respondents who have someone in their household with a disability or illness (30%), who are in the high or medium vulnerability group (25%), and who had self-disconnected from their electricity supply (35%) were less likely to know how to make a complaint.

Three in five (61%) domestic consumers were aware that their energy supplier has an obligation to protect them as a consumer, including one third (32%) who were completely aware of this. However, 37% were not aware of the obligation. This compares to 55% who said they were aware and 43% that said they were not aware in the 2023 Tracker (see Figure 10.1).

Both electricity (56%) and gas (59%) customers who have a prepayment meter were less likely to be aware of these obligations than those with a credit meter for electricity (65%) and gas (73%).

Figure 10.1 Awareness of consumer protection obligations



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

- Respondents who own their home (64%) were more likely to say they were aware than those who privately rent (55%) and who live in social housing (53%);
- 64% of respondents living in urban areas said they were aware of supplier obligations, compared to 58% in rural areas;
- Respondents who consider themselves to be confident internet users (65%) were more likely to state that they were aware of supplier obligations when compared to those who are not confident users (51%);
- Respondents who live in the least deprived areas (68%) were more likely to report they were aware than those in the most deprived areas (57%); and
- Electricity switchers (68%) and those who had not self-disconnected from their electricity supply (63%) were more likely to say they were aware of supplier obligations than non-switchers (58%) and those who had self-disconnected (53%).

Figure 10.2 Awareness of consumer protection obligations by tenure and location

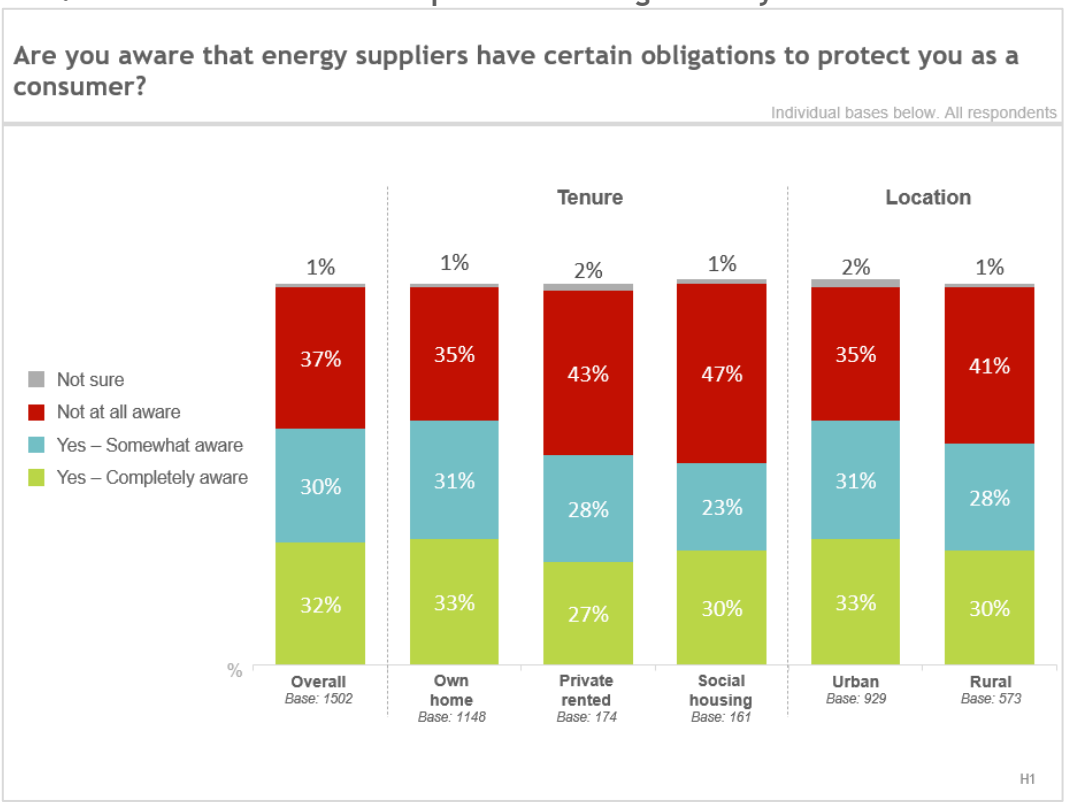


Figure 10.3 Awareness of consumer protection obligations by confidence using the internet and deprivation

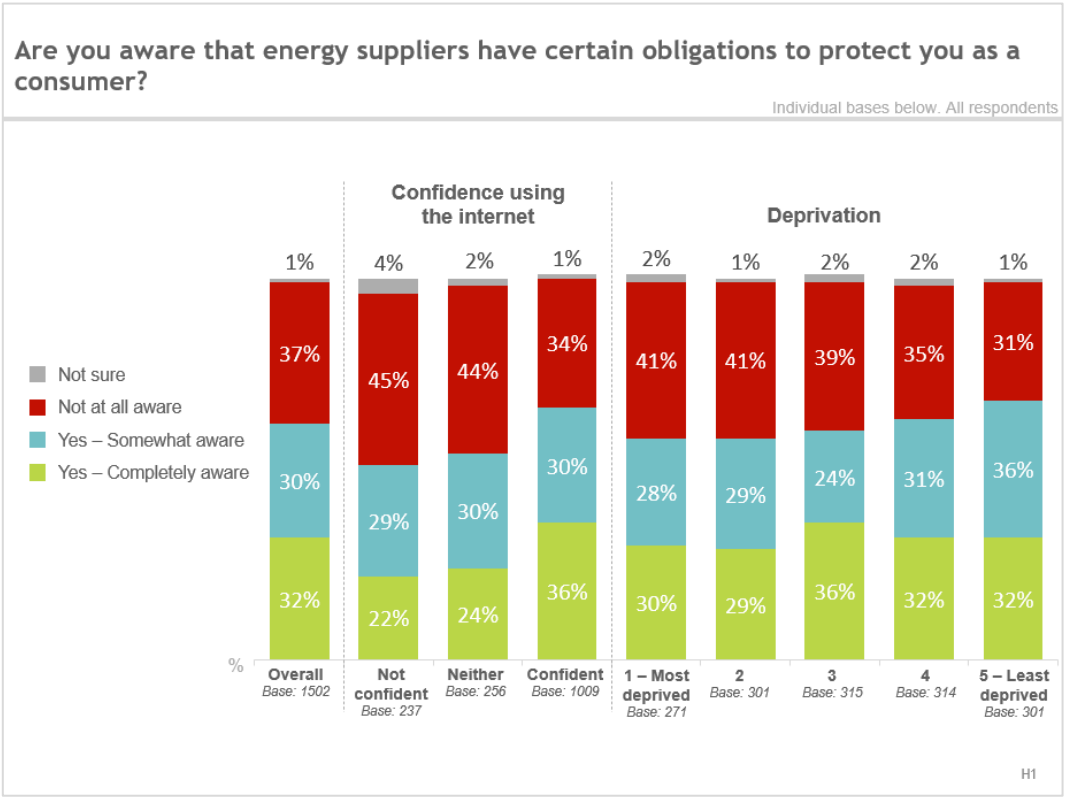


Figure 10.4 Awareness of consumer protection obligations by electricity payment method, electricity switching and electricity self-disconnection

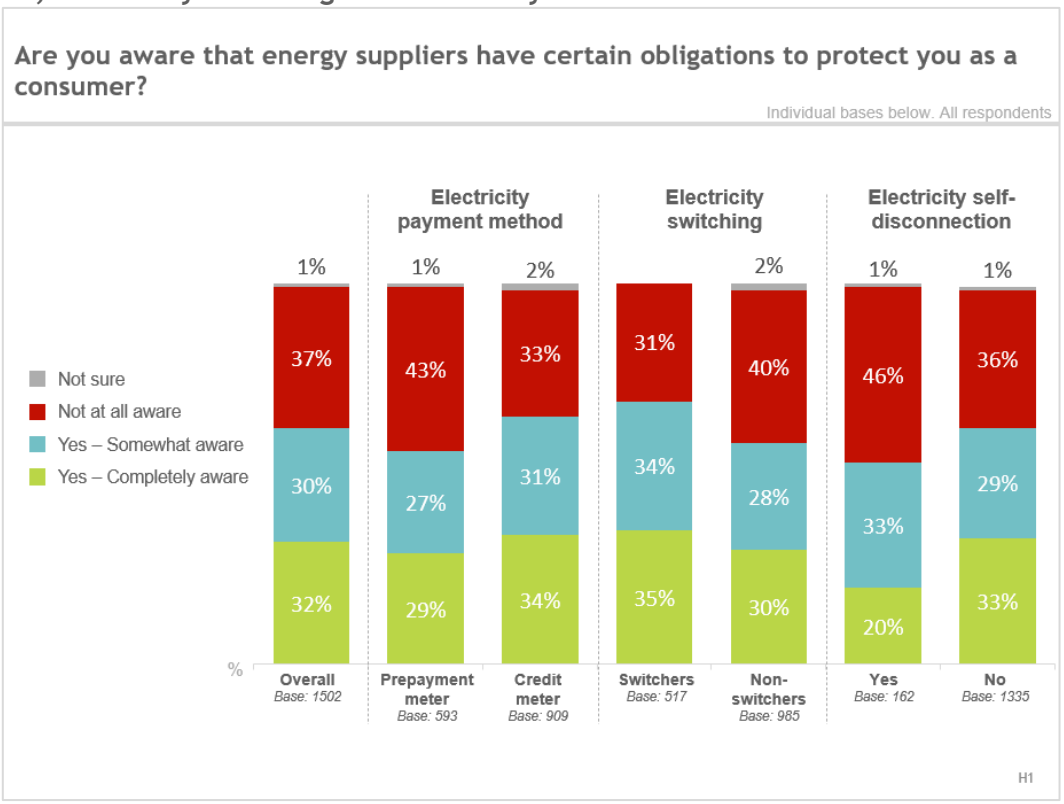
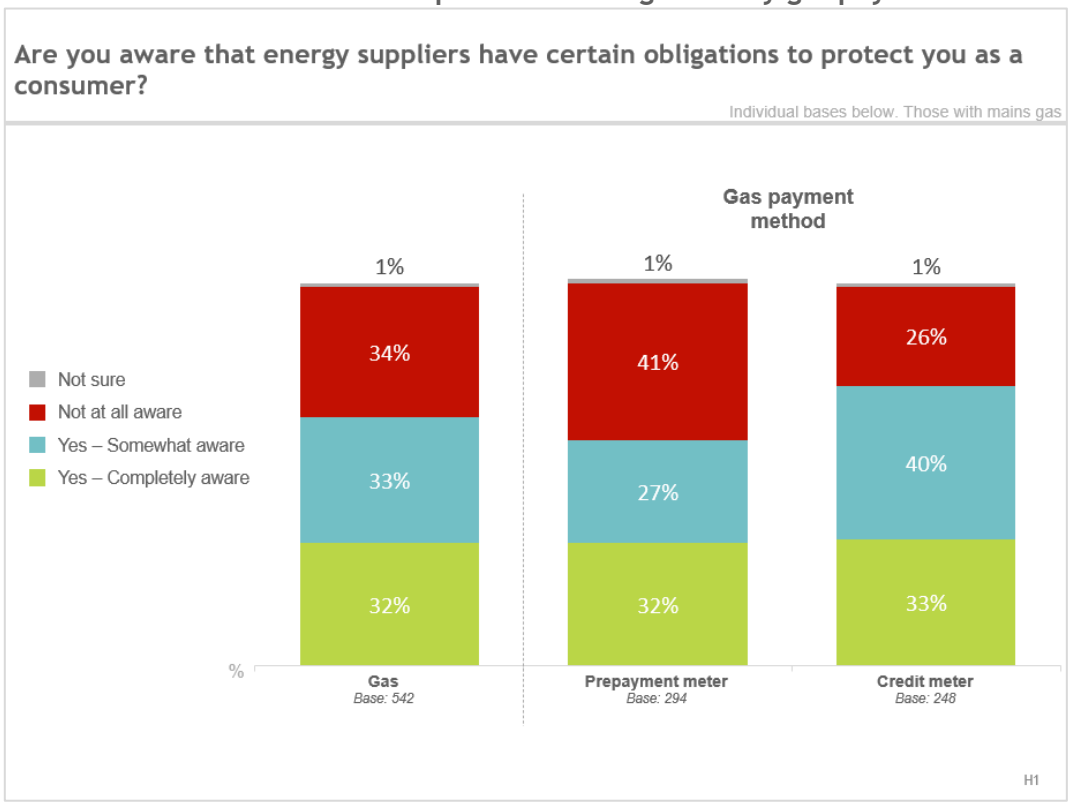
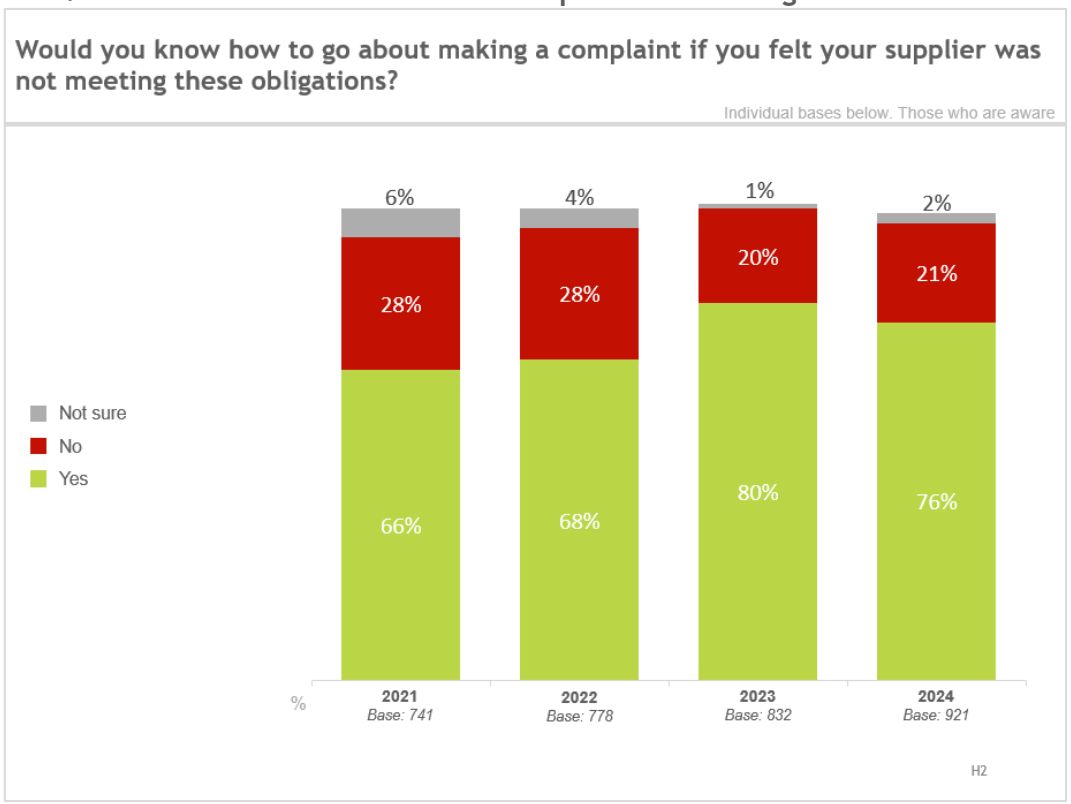


Figure 10.5 Awareness of consumer protection obligations by gas payment method



Of those who were aware, three quarters (76%) stated that they would know how to make a complaint if they felt their supplier was not meeting these obligations, decreasing from 80% in 2023 (see Figure 10.6).

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



There were several significant differences between subgroups in knowing how to make a complaint (see Table 10.2):

- Respondents in the ABC1 group (80%) were more likely to say they would know how to make a complaint than those in the C2DE group (72%);
- Those who own their home (79%) were more likely to know than those living in social housing (65%);
- Four in five (82%) respondents who live in the least deprived areas reported that they would know how to make a complaint, compared to two thirds (66%) who live in the least deprived areas;
- Respondents who have someone in their household with a disability or illness (68%) were less likely than those without (78%) to state that they would know how to make a complaint, as were those in the high or medium vulnerability group (73%) when compared with those who are not considered to be vulnerable (80%);
- Almost four in five (78%) of those who consider themselves to be confident internet users said they would know how to make a complaint, compared to two thirds (67%) who do not consider themselves confident users;
- Those who had self-disconnected from their electricity supply (62%) were less likely to say they would know how to make a complaint, compared to those who had not self-disconnected (78%).

Table 10.2 Awareness of how to make a complaint when obligations are not met by SEG, tenure, deprivation, disability/illness, vulnerability, confidence using the internet, electricity self-disconnection

		Yes	No	Not sure	*Total*
Overall	All *Base: 921*	76%	21%	2%	*100%*
SEG	ABC1 *Base: 480*	80%	18%	2%	*100%*
	C2DE *Base: 412*	72%	25%	3%	*100%*
Tenure	Owner occupied *Base: 731*	79%	19%	2%	*100%*
	Private rented *Base: 96*	71%	25%	4%	*100%*
	Social rented *Base: 85*	65%	32%	4%	*100%*
MDM Quintile	1 – Most deprived *Base: 155*	66%	30%	3%	*100%*
	2 *Base: 175*	74%	22%	3%	*100%*
	3 *Base: 188*	78%	21%	1%	*100%*
	4 *Base: 198*	77%	22%	2%	*100%*
	5 – Least deprived *Base: 205*	82%	15%	3%	*100%*
Disability/ illness	Yes *Base: 136*	68%	30%	1%	*100%*
	No *Base: 696*	78%	20%	3%	*100%*
Vulnerability	High/medium vulnerability *Base: 369*	73%	25%	2%	*100%*
	Low vulnerability *Base: 43*	60%	30%	9%	*100%*
	Not vulnerable *Base: 509*	80%	18%	2%	*100%*
Confidence using the internet	Not confident *Base: 121*	67%	32%	1%	*100%*
	Neither *Base: 140*	73%	25%	2%	*100%*
	Confident *Base: 660*	78%	19%	3%	*100%*
Electricity self-disconnection	Yes *Base: 86*	62%	35%	3%	*100%*
	No *Base: 835*	78%	20%	2%	*100%*

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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;
- Satisfaction with support services; and
- Contact about support services

Key findings

- 47% of respondents were aware of the support services offered by energy companies, including 23% who knew a bit about the services offered.
  - This compares to 51% who were aware overall and 36% who knew about the services offered in the 2023 Tracker.
  - Respondents in the C2DE group (55%), who privately rent (63%) and who have children in their household (58%) were less likely to be aware of the support services.
  - 2% of all participants were signed up to or had utilised some of the support services offered by energy companies.
- The majority (98%) of those in the high or medium vulnerability group had not signed up to utilise any of the support services offered by energy companies. 93% who have or live with someone who has a disability or illness had not signed up for any of these support services.
- One fifth (20%) were aware of the services for vulnerable consumers that NI Water provides, a decrease from 32%.
- 67% of respondents indicated that, if they had reduced their energy usage, they would be content for their energy supplier to contact them to discuss if they needed any support services.

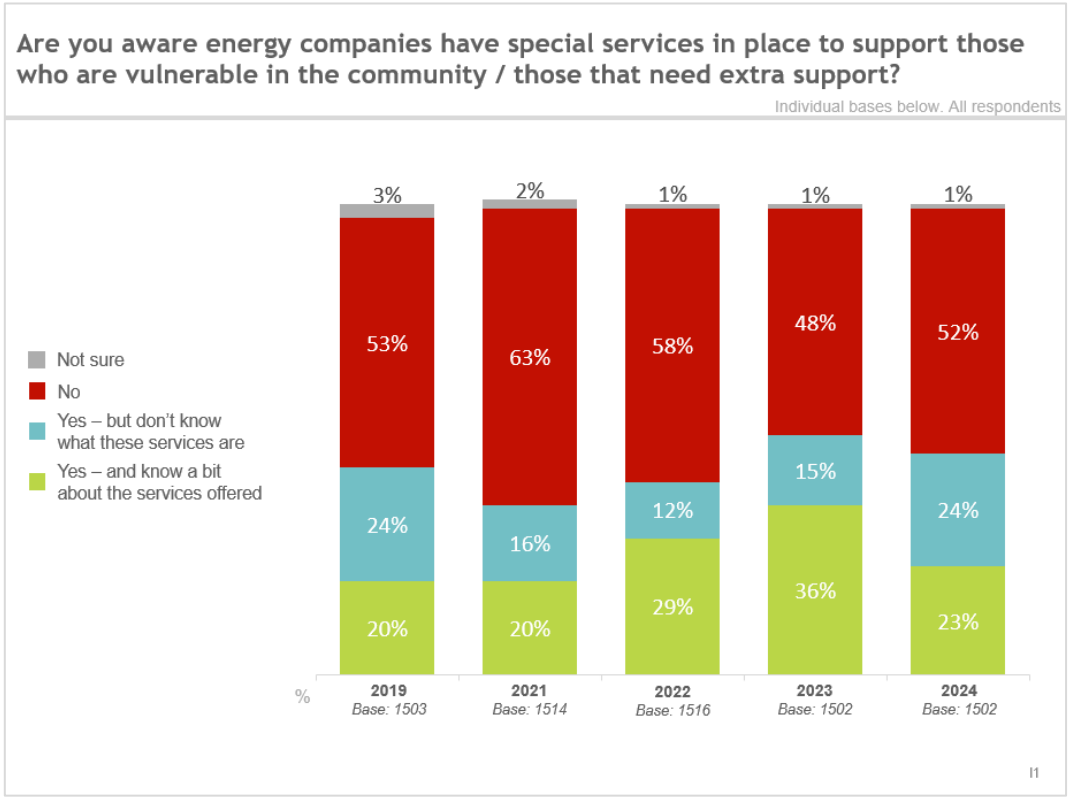
Energy companies

Awareness of support offered by energy companies

Under half (47%) of respondents indicated that they were aware that energy companies have support services for vulnerable customers, with 23% knowing something about what type of services are offered. This compares to 51% who were at least aware of the services and 36% who knew something about the services in the 2023 Tracker. The proportion who were not aware of the services increased to 52% from 48% in 2023.

There were no significant differences observed between those who have someone in their household with a disability or illness and those who do not, and also between those who are in the high or medium vulnerability group and those who are not considered vulnerable.

Figure 11.1 Awareness of support services offered by energy companies



Other sub-groups who were significantly less likely to be aware of support services included (see Figures 11.2 to 11.6):

- Respondents aged 18 to 34 (37%) were less likely to be aware than those aged 65 and over (49%);
- 43% of those in the C2DE group were aware, compared to half (50%) of those in the ABC1 group;
- Those who privately rent (36%) were less likely than those who live in social housing (45%) and who own their home (49%) to be aware of these services;
- 41% of respondents who have children in their household stated that they were aware, compared to 50% who do not have children in their household;
- Respondents who have a prepayment meter for electricity (44%) were less likely to be aware than those on a credit meter (49%);

- 43% of the respondents who had not switched electricity supplier in the last three years said that they were aware of the support services, compared to 55% of those who had switched, with switchers also more likely to know a bit about the services offered (28%, compared to 20% of non-switchers); and
- Although there were no significant differences in those saying they knew a bit about the services offered, respondents who had self-disconnected from their electricity supply (31%, compared to 23% who had not self-disconnected) were more likely to say they were aware of the services but did not know what they were.

Figure 11.2 Awareness of support services offered by energy companies by demographics

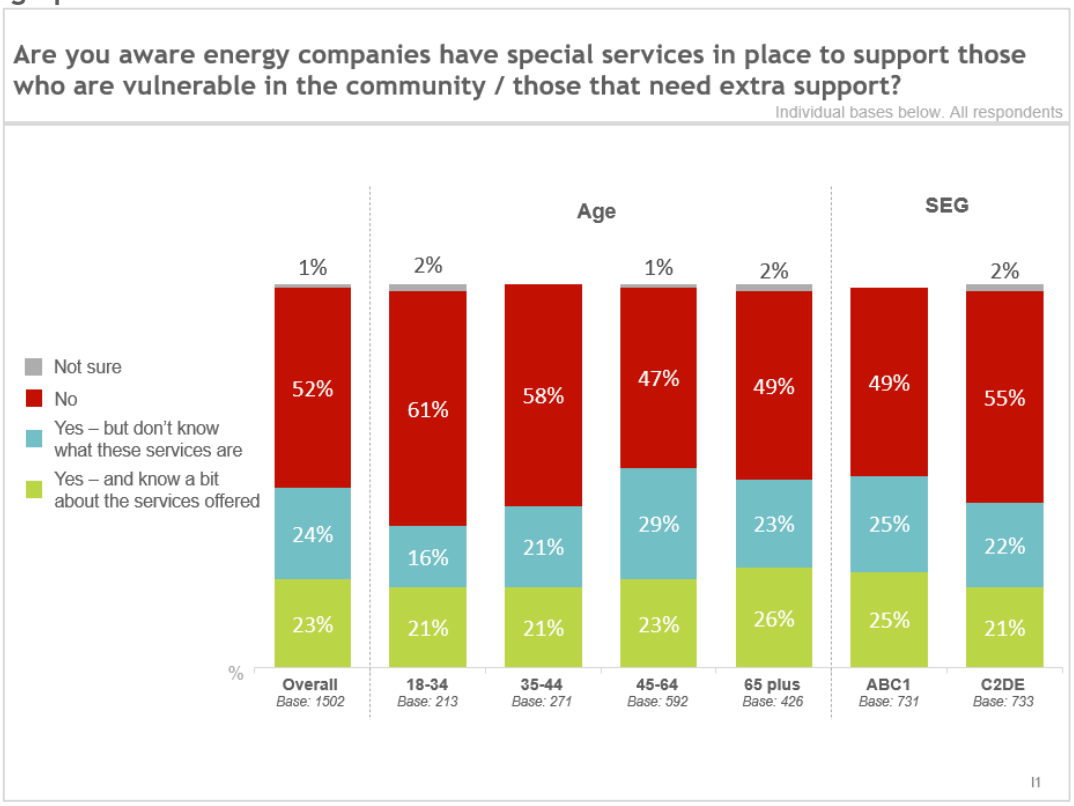


Figure 11.3 Awareness of support services offered by energy companies by tenure and children

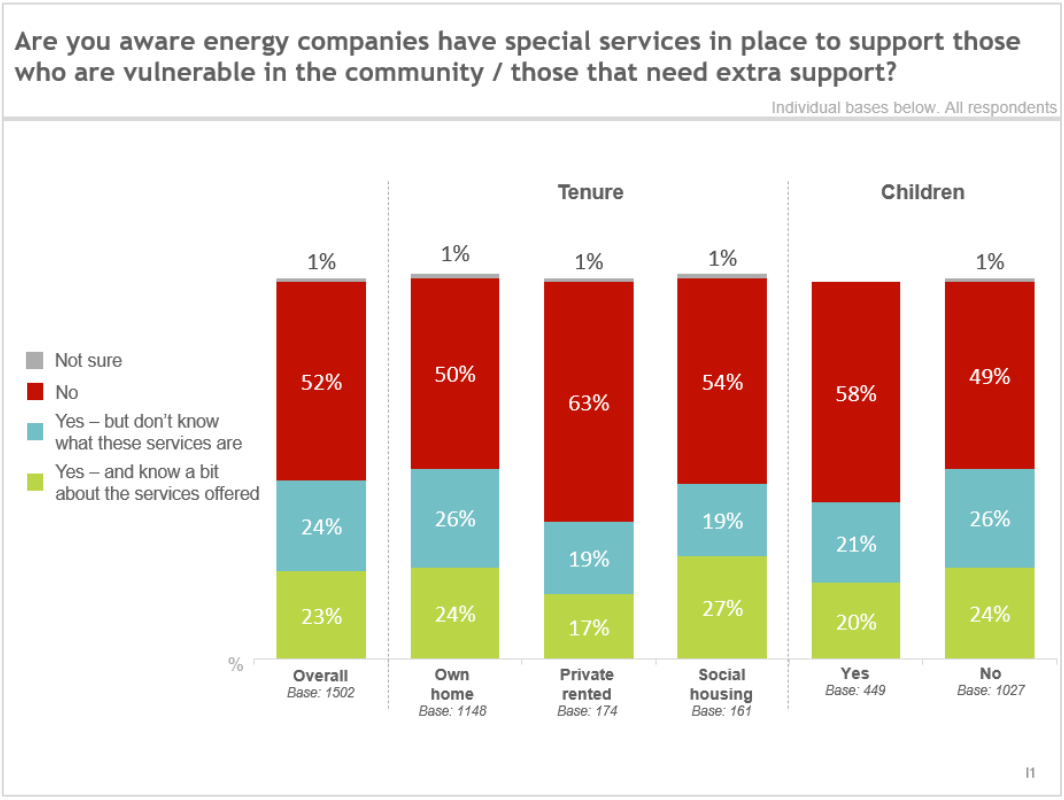
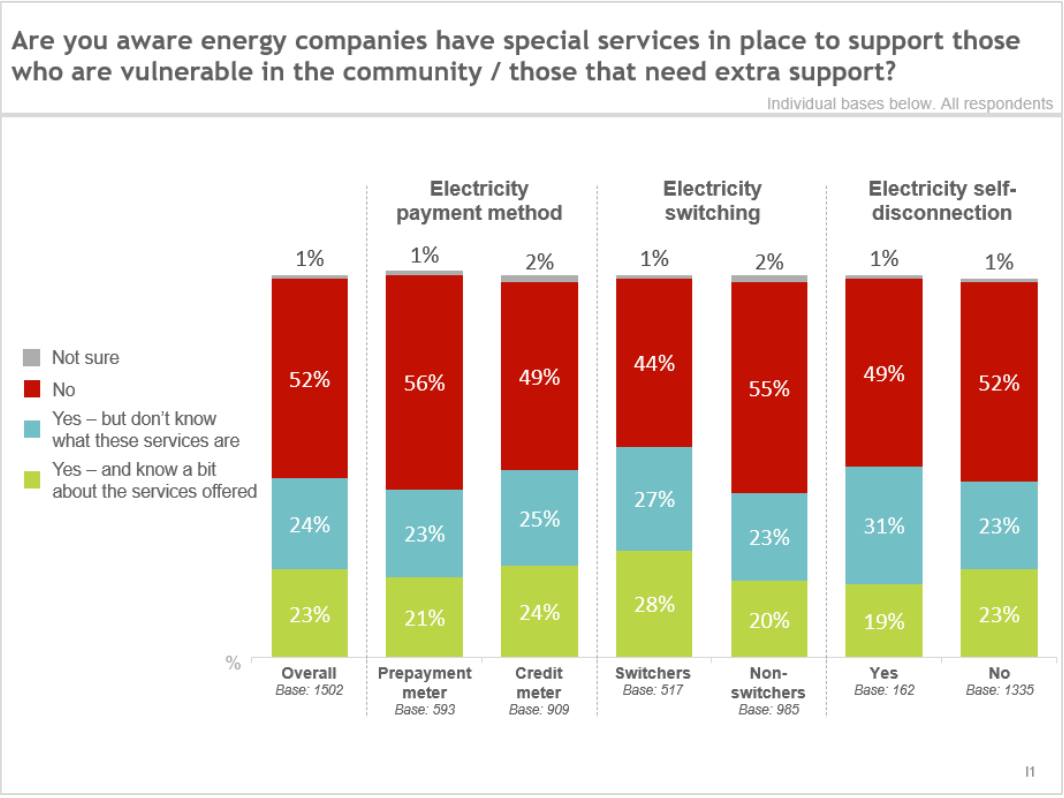


Figure 11.5 Awareness of support services offered by energy companies by electricity payment method, switching and self-disconnection



Use of support offered by energy companies

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

- **NIE Networks' Medical 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. Two respondents requested a large print bill, while three had been included in the Password Scheme. 98% of those considered to be vulnerable had not signed up for any of the support services, while 93% of those who have or live with someone who has a disability or illness had not signed up.

Figure 11.7 Use of support services offered by energy companies

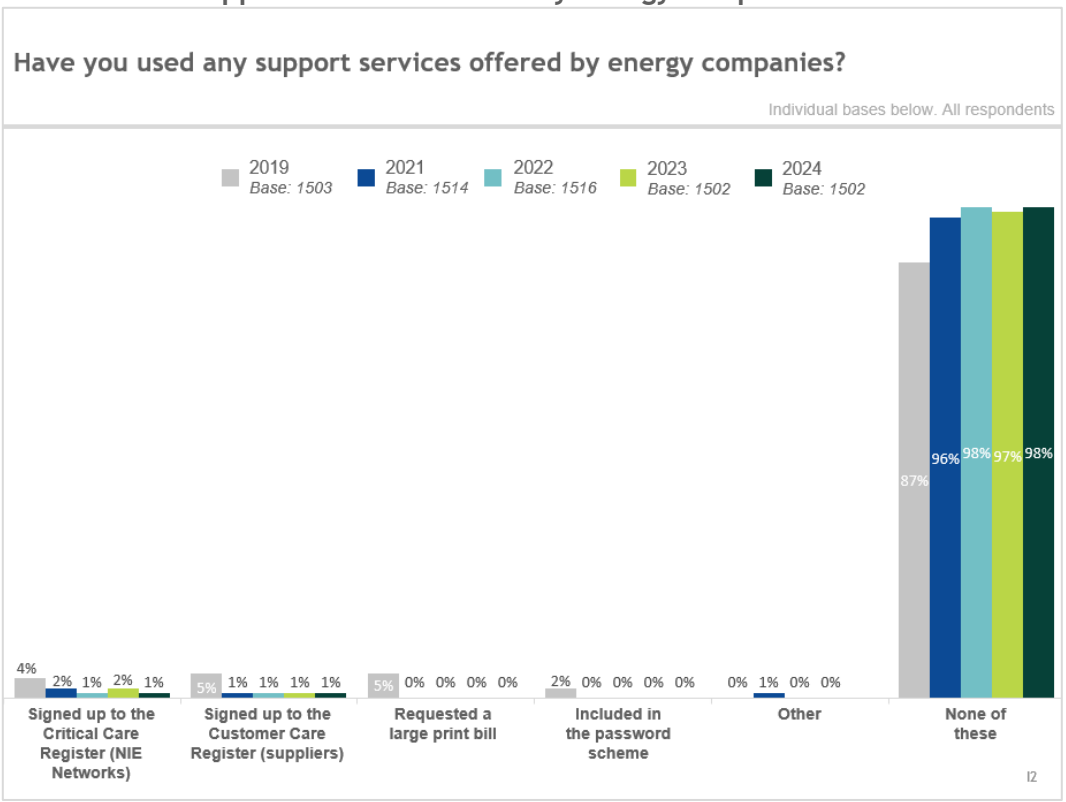


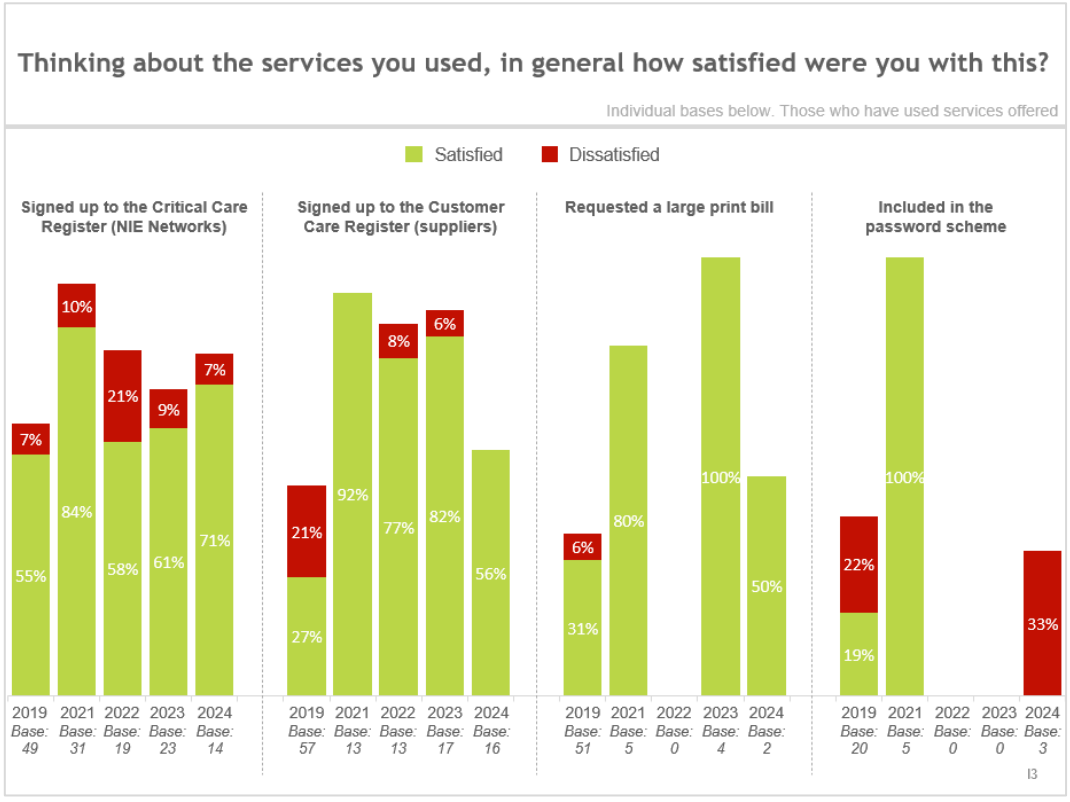
Table 11.1 Use of support services offered by energy companies by vulnerability and disability/illness

		Vulnerability			Disability/illness	
	Overall *Base: 1502*	High/medium vulnerability *Base: 623*	Low vulnerability *Base: 57*	Not vulnerable *Base: 822*	Yes *Base: 242*	No *Base: 1107*
Signed up to the NIE Networks Medical Care Register	1%	1%	-	1%	3%	1%
Signed up to the customer care register	1%	2%	-	0%	5%	0%
Requested a large print bill	0%	0%	-	-	1%	-
Included in the Password Scheme	0%	0%	-	0%	1%	0%
None of these	98%	97%	100%	99%	93%	99%

Satisfaction with support offered by energy companies

17 of the 28 domestic consumers who had used at least one of the support services said they were 'satisfied' or 'very satisfied' with the service. 10 of the 14 respondents who signed up to NIE Networks' Medical Customer Care Register reported satisfaction with the service, and 9 of the 16 who signed up to their suppliers Customer Care Register reported the same (see Figure 11.3).

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



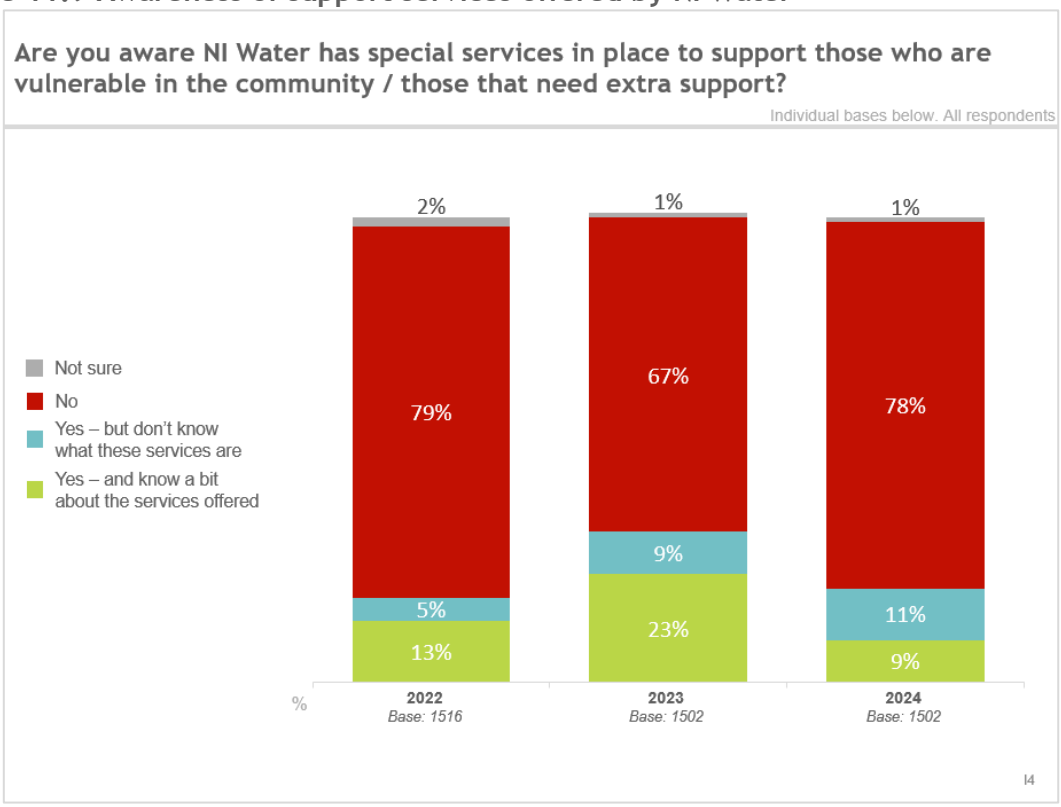
*Due to small sample sizes these findings are not generalisable.

NI Water

Awareness of support services offered by NI Water

One fifth (20%) of domestic consumers were aware that NI Water offered support services for vulnerable customers, including 9% who knew a bit about the services offered. This has decreased since 2023, when 32% indicated that they were aware of the support services (see Figure 11.9).

Figure 11.9 Awareness of support services offered by NI Water



Respondents in the high and medium vulnerability group (19%) and who have or live with someone who has a disability or illness (13%) were less likely to be aware of these services than those who are not vulnerable (21%) and who do not have or live with someone who has a disability or illness (23%). Subgroup analysis revealed that certain groups were also less likely to be aware of the services offered by NI Water (see Figures 11.10 to 11.12):

- 15% of those in the C2DE group, compared to 25% in the ABC1 group;
- 14% of those living in social housing and 17% who privately rent, compared to 22% who own their home;
- 13% of those who do not consider themselves to be confident internet users, compared to 23% of confident users;
- 17% of those who have children in their household, compared to 22% without children;
- 16% of those with a prepayment meter for electricity, compared to 23% on a credit meter; and
- 11% of those who had self-disconnected from their electricity supply, compared to 22% who had not.

Figure 11.10 Awareness of support services offered by NI Water by SEG, tenure, and confidence using the internet

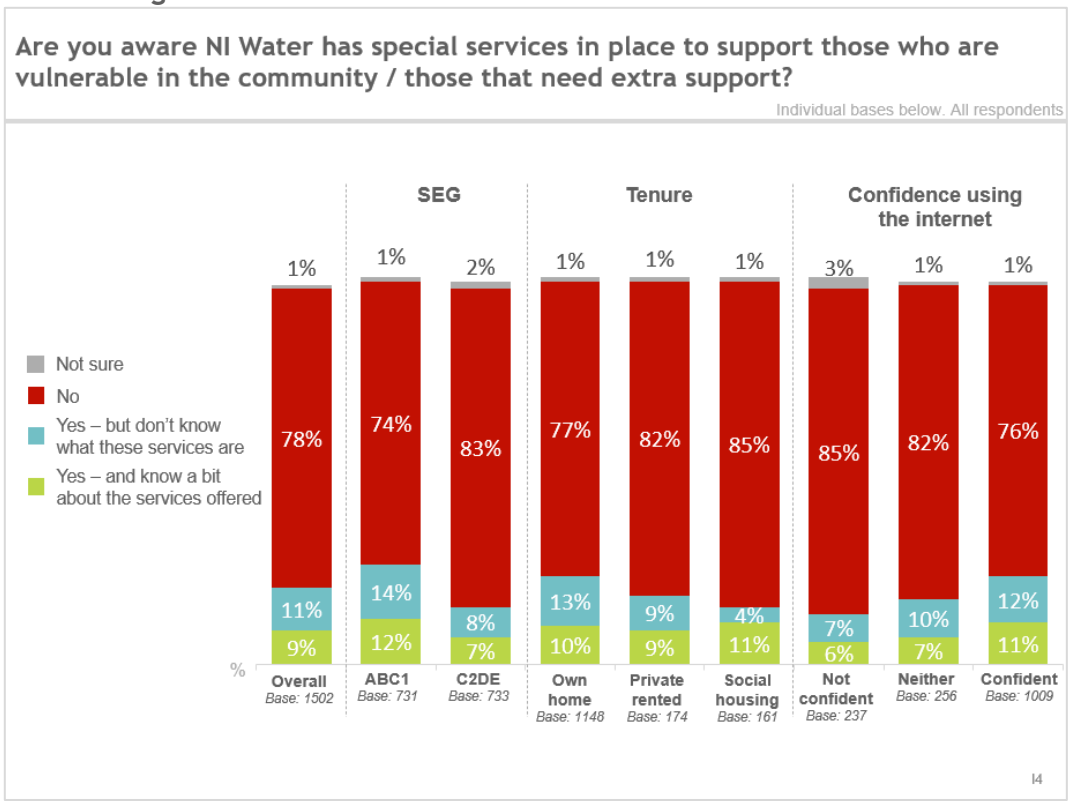


Figure 11.11 Awareness of support services offered by NI Water by disability/illness, children, and vulnerability

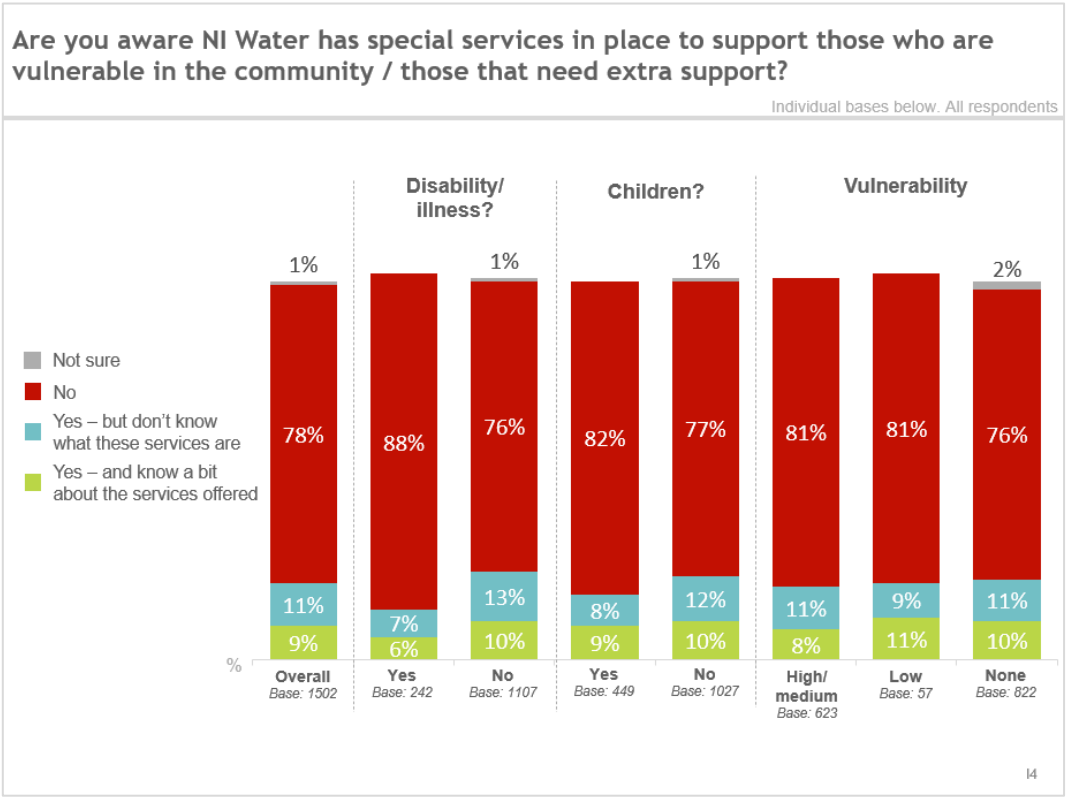
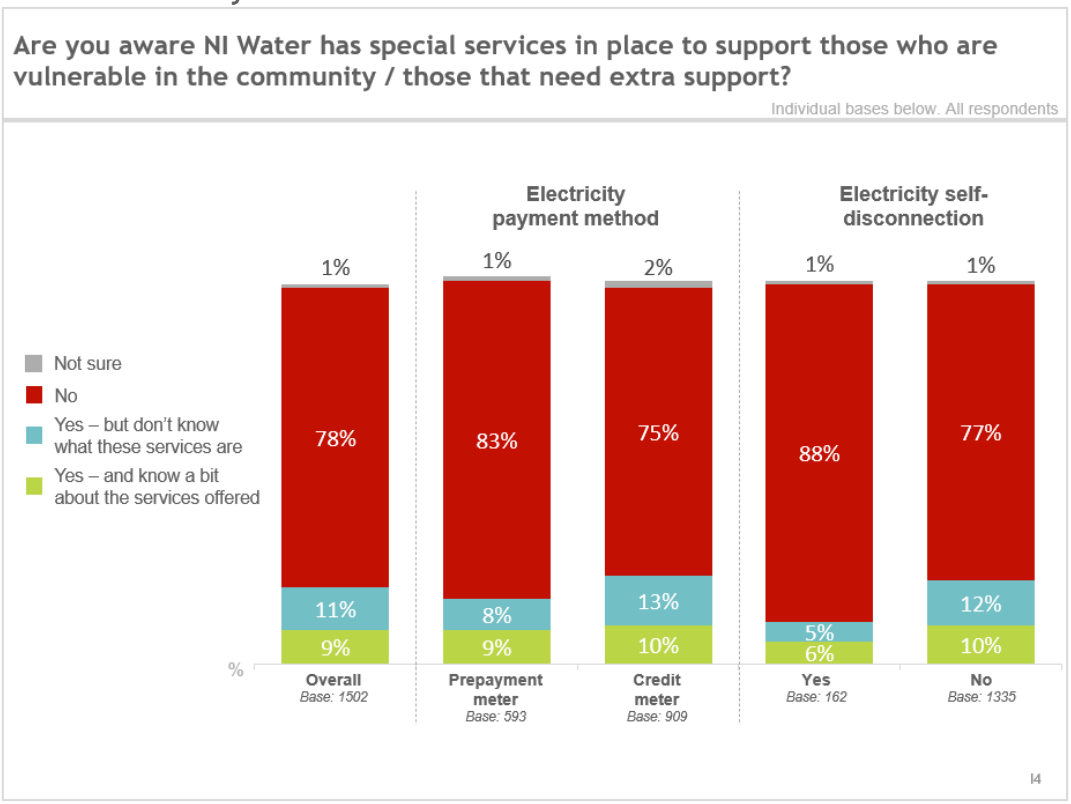


Figure 11.12 Awareness of support services offered by NI Water by electricity payment method and electricity self-disconnection

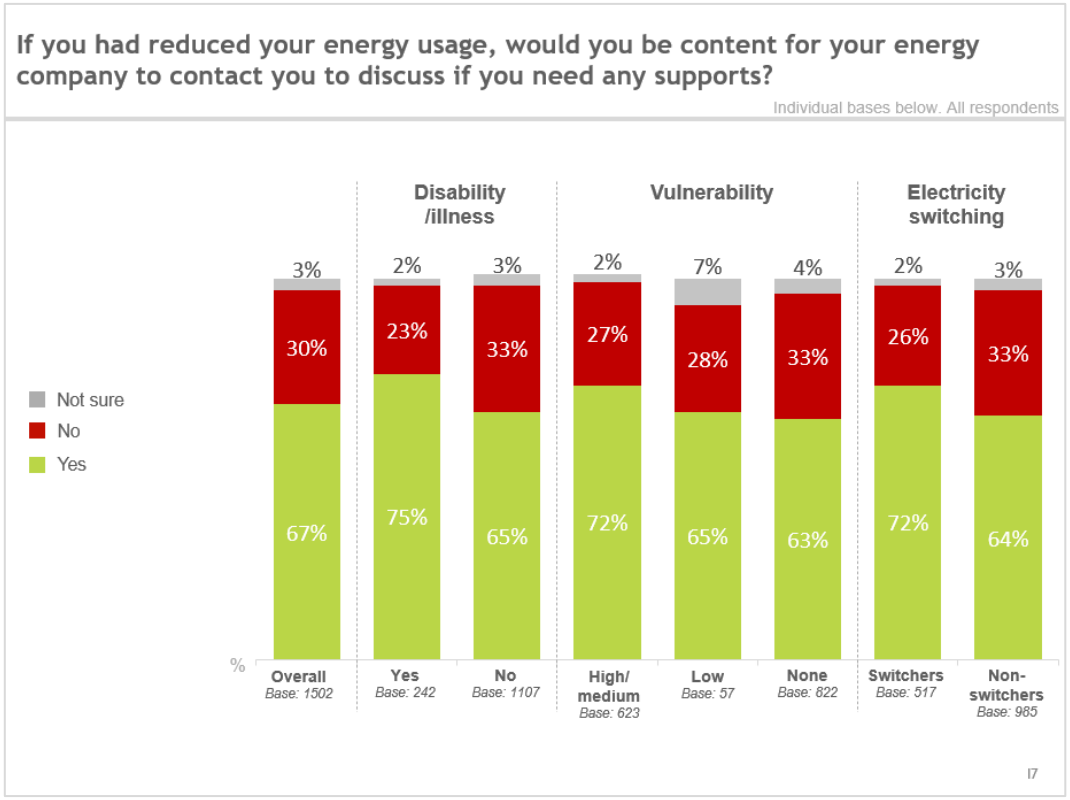


Contact about support services

A new question was added to the 2024 Tracker survey, asking had the respondent reduced their energy usage would they be content for their energy company to contact them to discuss if they needed any supports.

Two thirds (67%) of respondents indicated that they would be content for their supplier to contact them about supports, compared to 30% who would not want their supplier to do this. Respondents who have someone in their household with a disability or illness (75%) were more likely than those without (65%) to say they would be happy for their energy supplier to contact them about support services, as were those in the high or medium vulnerability group (72%) when compared to those who are not considered vulnerable (63%). 72% of electricity switchers also stated they would be content for their supplier to contact them about support services, compared to 64% of non-switchers.

Figure 11.13 Contacting to discuss support services by disability/illness, vulnerability, and electricity switching



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. Just Transition to Net Zero

A new section was added to the 2024 Domestic Tracker Survey which measured domestic consumer's knowledge of the term 'the Just Transition to Net Zero'. This section will cover the following:

- Understanding of the 'Just Transition to Net Zero'; and
- Responsibility for the 'Just Transition to Net Zero'.

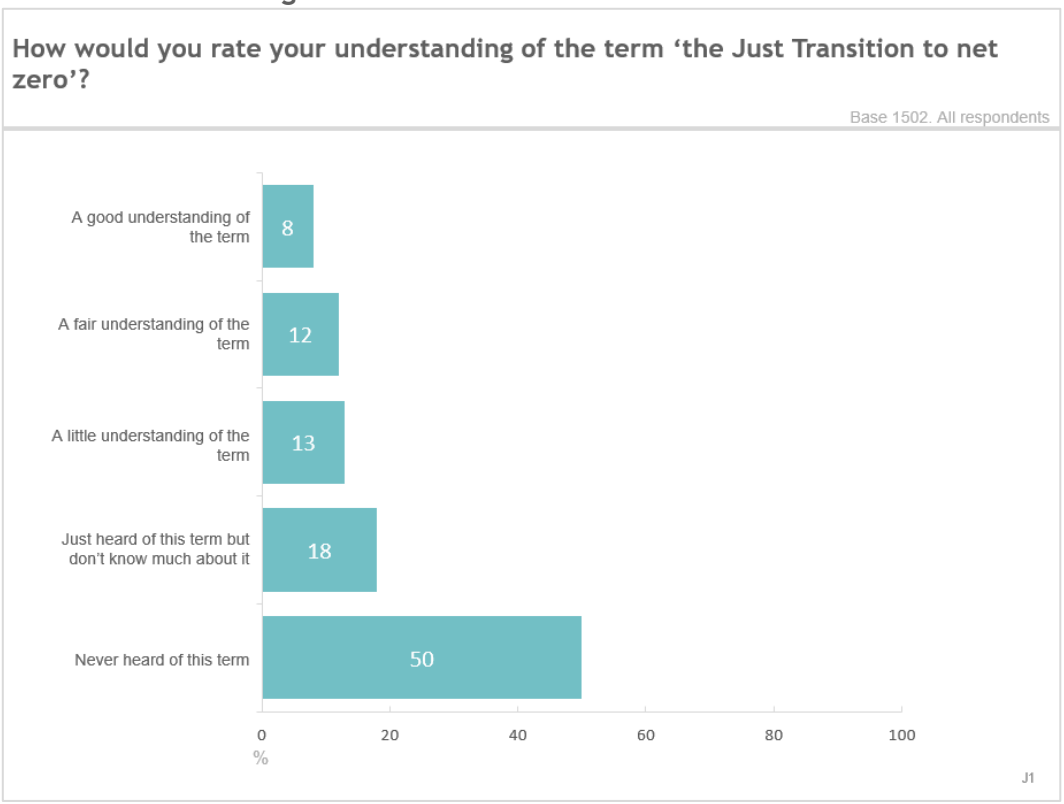
Key findings

- Half (50%) of respondents had never heard of the term 'Just Transition to Net Zero.'
- One fifth (20%) of respondents said they have a 'fair' or 'good' understanding of what is meant by the 'Just Transition to Net Zero', with a further 13% reporting they have 'a little' understanding of the term. A further 18% had heard of the term but didn't know much about it.
- 28% thought that the NI Assembly was most responsible for supporting the Just Transition, and one quarter (25%) thought the responsibility was with Westminster.

Understanding of ‘the Just Transition to Net Zero’

Respondents were first asked to rate how well they understood the term ‘the Just Transition to Net Zero’. Half (50%) said they had never heard of the term, while a further 18% had only just heard of the term but did not know much about it. In comparison, one fifth (20%) rated their understanding as being fair to good, while 13% stated that they had a little understanding (see Figure 12.1).

Figure 12.1 Understanding of ‘the Just Transition to Net Zero’



Several subgroups were more likely to have heard of the 'Just Transition to Net Zero' and have at least a little understanding of the term than others (see Figures 12.2 to 12.4):

- Respondents aged 18 to 34 (42%) were more likely to say they had an understanding of the term than those aged 65 and over (24%);
- Those in the ABC1 group (40%) were more likely to report having an understanding of the term than those in the C2DE group (26%);
- Respondents who own their home (35%) and who privately rent (32%) were more likely to state having at least a little understanding than those living in social housing (14%);
- 37% of those who consider themselves to be confident internet users said they have some understanding, compared to 16% of those who are not confident users;
- Respondents living in the least deprived areas (42%) were more likely to report having an understanding of the term than those in the most deprived areas (22%);
- 37% of respondents who have a credit meter for electricity said they have some understanding of the term, compared to 26% of respondents on a prepayment meter;
- Those who had not self-disconnected from their electricity supply (51%) were more likely to report that they had never heard of the term when compared to those who have self-disconnected (41%), although no significant differences were observed in those who did have an understanding.

Figure 12.2 Understanding of 'the Just Transition to Net Zero' by demographics and tenure

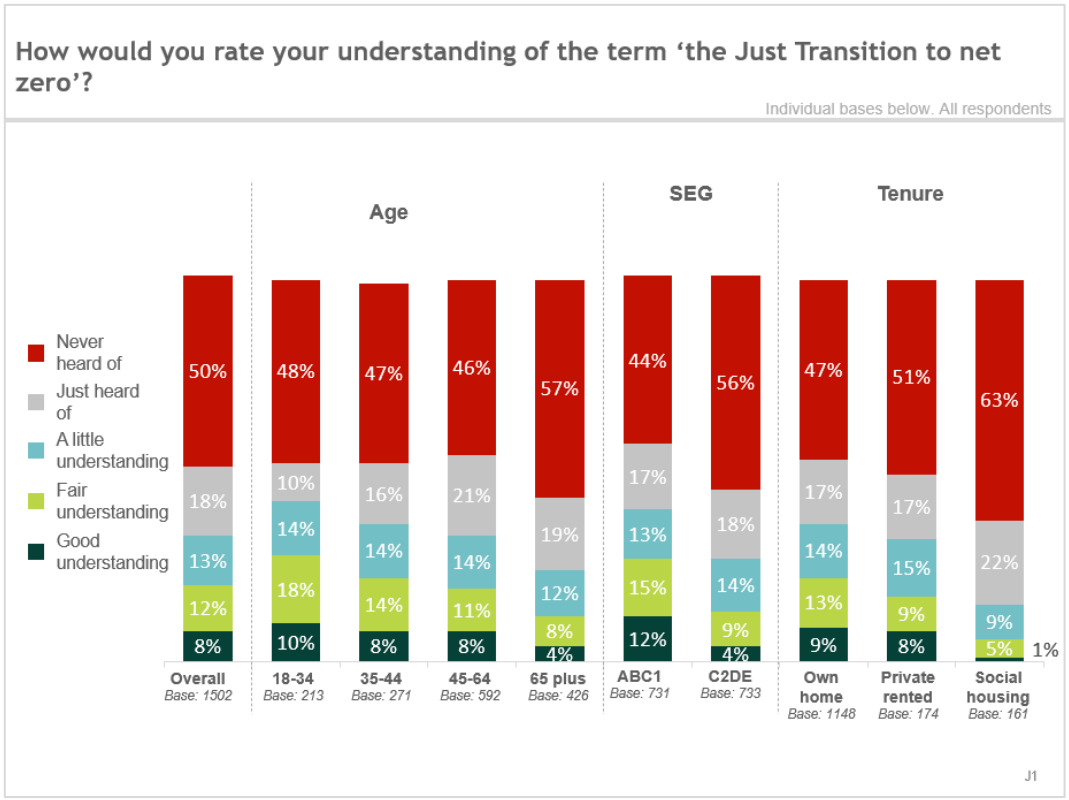


Figure 12.3 Understanding of 'the Just Transition to Net Zero' by confidence using the internet and deprivation

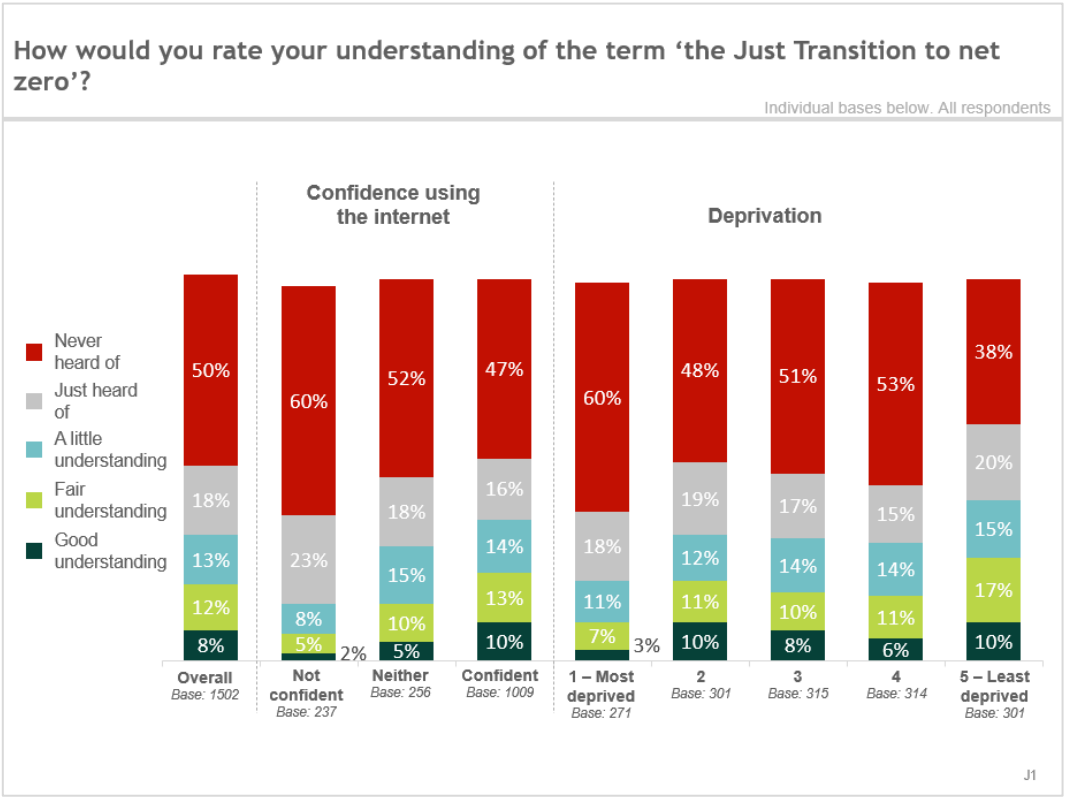
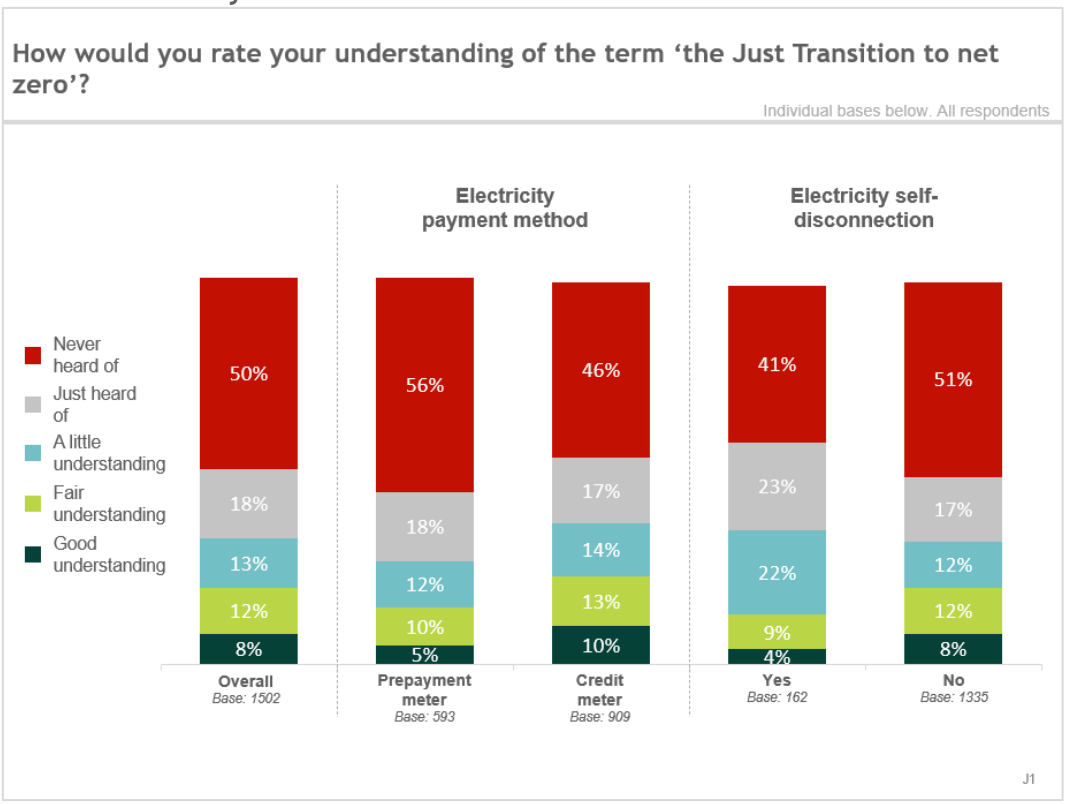


Figure 12.4 Understanding of 'the Just Transition to Net Zero' by electricity payment method and electricity self-disconnection

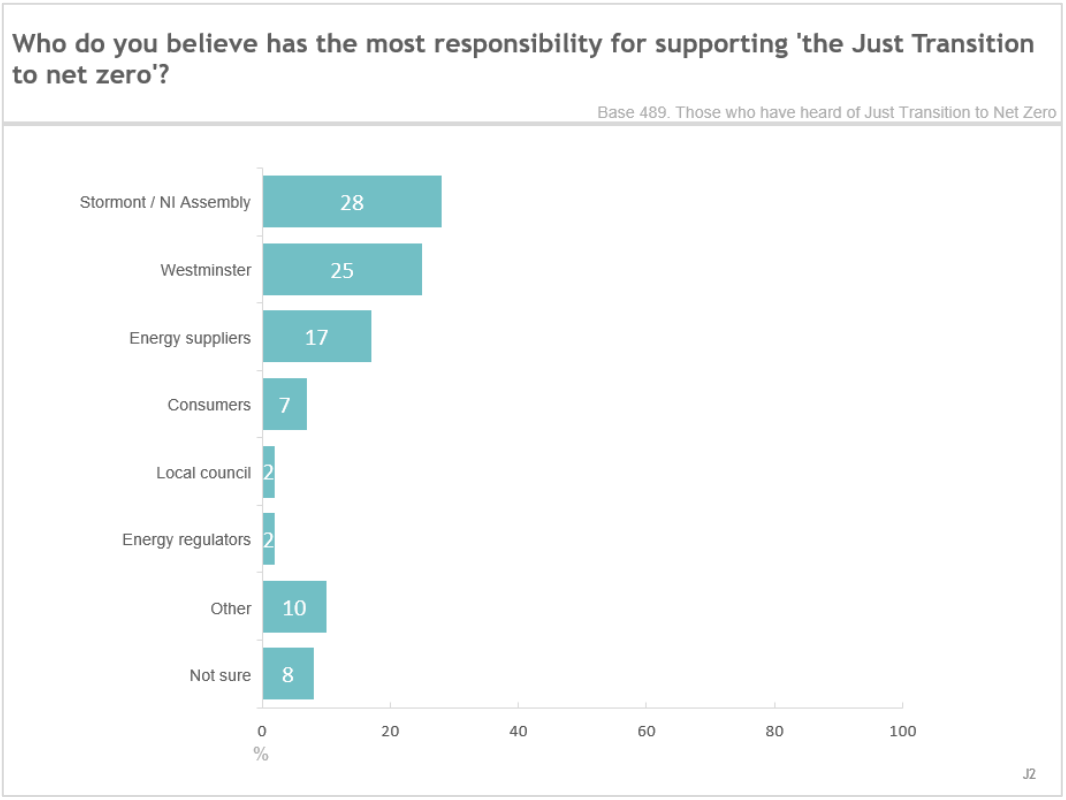


Responsibility for the 'Just Transition to Net Zero'

Respondents who had heard of 'the Just Transition to Net Zero' were asked who they thought had the most responsibility for supporting the transition (see Figure 12.5).

Respondents were more likely to mention Stormont or the NI Assembly (28%) and Westminster (25%) as being most responsible for supporting the 'Just Transition to Net Zero'. 17% said it was the responsibility of energy suppliers, while 2% stated it was the responsibility of energy regulators. 8% were unsure who should be responsible.

Figure 12.5 Responsibility for the 'Just Transition to Net Zero'



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13. 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.

Consumers may have adapted to higher energy costs

Electricity spend has remained consistent with the previous two Trackers, with 42% reporting a monthly electricity spend of £100 or more compared to 43% that was observed in both 2022 and 2023; considerably higher than the 13% who stated this in 2021. It should also be noted that the proportion spending £150 or more decreased from 16% in 2023 to 13%. Those spending £100 or more on their heating[13] per month increased from 41% to 45%, although more consumers are now aware of their monthly heating spend compared to the 2023 Tracker.

Fewer respondents reported that they were struggling to pay their electricity and gas bills, while the proportion that said they had reduced their electricity and gas usage has also decreased from the 2023 Tracker. One possible explanation for this is that respondents had already reduced their energy usage in response to higher energy costs in previous years. There is also greater willingness to spend extra on energy bills to support future investment with over one quarter (27%) indicating that they would be willing to pay extra on their bill to support investment, compared to 17% in 2023. 27% said they would be willing to pay extra on their bill to allow particular consumer groups to avail of a discounted tariff. There was a slight decrease in the amount of respondents who stated they had gone without or delayed getting essentials to pay for their energy.

Consumer engagement with energy suppliers has fallen

One potential impact of domestic consumers adapting to higher energy spends is that they may have become less engaged in their energy bill. In 2023, half (50%) said they read the last written correspondence they received from their electricity supplier, and half (49%) read the last written correspondence from their gas supplier. In 2024, the corresponding figures fell to 42% for electricity and 41% for gas. Those that only glanced at the correspondence increased from 16% to 26% for electricity customers and 15% to 20% for gas customers between 2023 and 2024. The percentage of gas customers who said they did not look at or open the correspondence increased from 8% to 17%.

The proportion of electricity customers who said they distrust their electricity supplier to treat them fairly in their dealings fell from 17% in 2023 to 12%, while those that said they distrust their supplier to provide a fair price decreased from 21% to 17%. However, rather than an increase in the proportion who said they trusted their supplier in these areas, there was instead

[13] All types of heating, including gas.

an increase in those that said they neither trusted nor distrusted their supplier. This was also evident when respondents were asked to rate their satisfaction with the overall service their supplier provides. In 2023, 9% of both electricity and gas customers said they were neither satisfied nor dissatisfied with the service provided, compared to 14% for electricity and 17% for gas customers in 2024. This increase in apathy was also evident in respondent's attitudes to comparing energy deals. 15% neither agreed nor disagreed that having a choice of suppliers gives access to better electricity deals, compared to 7% who stated this in 2023. Under one fifth (18%) reported that they found it neither easy nor difficult to compare different deals for electricity, increasing from 7% in 2023.

Another area in which engagement has fallen is in levels of awareness in comparing energy deals. 89% of respondents in 2023 said they were completely aware that they could choose between different electricity suppliers, with this falling to 70% in 2024. Incidence of comparing electricity deals decreased from 53% in 2023 to 46%.

Domestic consumers who had self-disconnected from their electricity supply were less likely to be aware of the format that they receive written correspondence from their supplier and to report that they only glanced at the correspondence. These respondents were also less likely to be aware of supplier obligations to protect customers, and to know how to make a complaint if these obligations are not being met. Other subgroups who were more likely to demonstrate lower engagement included those on prepayment meters and older consumers aged 65 and over. Further discussion on these groups is included later in the conclusions.

Fall in awareness of support services

The percentage of domestic consumers who are aware of services offered by energy companies to support vulnerable customers has decreased from 51% in 2023 to 47% in 2024, while the proportion who know about the services offered decreased from 36% in 2023 to 23% in the current Tracker. The uptake of these services also remains very low, with 98% of respondents saying they had not used any support services, including 98% of respondents who would be considered vulnerable and 93% of those who have or live with someone who has a disability or illness.

Awareness of the support services offered to vulnerable customers by NI Water has also decreased, with almost 9% saying they knew about the services compared to under one quarter (23%) in 2023, while overall awareness decreased from one third (32%) to one fifth (20%) between 2023 and 2024. Respondents in the high and medium vulnerability group and those who have someone in their household with a disability or illness were less likely to report that they knew about these services.

Vulnerable subgroups more likely to be struggling with energy bills

Subgroup analysis revealed that vulnerable subgroups were more likely to report that they were struggling with their energy bills. Despite there being no significant differences with their counterparts in terms of their electricity spend, respondents who have someone living in their household with a disability or illness (36%, compared to 21% without) and those who are in the high or medium vulnerability group (26%, compared to 20% not considered to be vulnerable) were more likely to state that they sometimes struggle to pay their electricity bills.

These groups were also more likely to have changed their behaviours to help pay their electricity bills. 16% of those who have someone in their household with a disability or illness had delayed or gone without essentials to pay for electricity compared to 4% without someone with a disability or illness in the household, while 9% of those in the high or medium vulnerability group had done the same in comparison with 4% who are not considered to be vulnerable. Respondents who have someone in their household with a disability or illness (55%) and those in the high or medium vulnerability group (45%) were more likely to have reduced their electricity usage in the last 12 months than those without someone with a disability or illness in their household (38%) and who are not considered vulnerable (39%). 13% who have someone in their household with a disability or illness and 6% in the high or medium vulnerability group reported that they had borrowed to pay their electricity bills in the past 12 months, compared to 3% without someone in their household with a disability and 3% who are not considered vulnerable.

It is notable that these subgroups were less likely to engage with the correspondence they receive from their supplier. Respondents who have someone in their household with a disability or illness (22%) and those in the high or medium vulnerability group (20%) were more likely than those without (16%) and those not considered to be vulnerable (15%) to not know how they receive correspondence from their electricity supplier.

Respondents who have children living in their household were also more likely to suggest that they were struggling, with this group more likely to report that they spend £100 or more per month on electricity (57%, compared to 35% without children) and on heating (52%, compared to 41% without children). Those with children were more likely than those without to report that they sometimes struggle with their electricity bill (29%, compared to 21% without children), that they had gone without or delayed getting essentials to pay for electricity (9%, compared to 5% without children), and that they have had to borrow to pay their electricity (7%, compared to 4% without children) and gas bills (10%, compared to 4% without children).

Prepayment meter customers

The 2024 Tracker found that two in five (39%) respondents use a prepayment meter for electricity, while 54% of gas customers have a prepayment meter for heating.

Respondents who live in social housing and who privately rent were more likely to use a prepayment meter for electricity, as were those living in urban areas and those who had switched electricity supplier in the last three years. The following subgroups were more likely to have a prepayment meter for both electricity and their gas heating:

- Respondents aged 18 to 34 compared to those aged 65 and over;
- Respondents in the C2DE socio-economic group compared to those in the ABC1 group;
- Respondents living in the most deprived areas compared to those in the least deprived areas;
- Respondents who have someone in their household with a disability or illness compared to those who do not;

- Respondents who have children living in their household compared to those who do not; and
- Respondents in the high or medium vulnerability group compared to those who are not considered to be vulnerable.

Respondents who have a prepayment meter for electricity were more likely to be unaware of how they receive written correspondence from their supplier but were more likely to have switched electricity supplier at least once and within the last three years when compared to those on a credit meter. One third (33%) of those with a prepayment meter for electricity said that they sometimes struggle with their bill compared to 17% on a credit meter, while 35% of those with a prepayment meter for gas reported that they sometimes struggle compared to 17% on a gas credit meter. 12% of those with an electricity prepayment meter said they had gone without or delayed getting essentials to pay for their electricity bill. Both those who have a prepayment meter for electricity and for gas were more likely to have reduced their energy usage and to have borrowed to pay their respective bills.

Drivers for switching remain the same

47% of respondents reported that they had ever switched their electricity supplier. Of these consumers, 75% had switched within the last three years ('switchers'). As in 2023, the most common drivers for switching electricity supplier were reacting to feeling they were overpaying, reacting to a promotional offer from another supplier, and reacting to an approach by a doorstep seller. Switching via a doorstep seller was also the most likely method of switching electricity supplier.

The proportion of respondents who said they would be likely to switch electricity supplier in the next 12 months decreased to 16% from 25% in 2023, again suggesting there may now be less engagement in the energy market among domestic consumers. Those who had already switched supplier in the last three years were more likely to say they would switch again in the next year and were also more likely to demonstrate engagement in other areas. Electricity switchers were more likely to be aware they can choose between different suppliers and that having a choice gives access to better deals, as well as being more likely to have compared deals and to have found it easy to do so. Greater awareness of supplier obligations to their customers and of energy supplier support services was also evident in electricity switchers when compared with non-switchers.

Almost half (48%) of those who switched electricity supplier in the last three years said they spend £100 or more on electricity per month, compared to 38% of non-switchers. Electricity switchers were more likely to report that they are struggling; 31% of switchers said they sometimes struggled with their bill over the past year compared to 19% of non-switchers. Switchers were also more likely to have gone without or delayed getting essentials in order to pay for electricity, and to have reduced their electricity usage and borrowed to pay their electricity bill in the past 12 months.

Older consumers struggling less but have similar engagement with their energy contract as younger respondents

One third (34%) of domestic consumers aged 18 to 34 and of those aged 65 and over reported that they spend £100 or more on electricity per month, but it is consumers in the older age group who were less likely to be struggling with their electricity bill. 17% of those aged 65 plus said they sometimes struggle with their electricity bill compared to 25% in the younger age group. Older respondents were also less likely to have gone without or delayed getting essentials in order to pay for electricity, reduced their electricity usage, and to have borrowed to pay their electricity bill than those aged under 35.

Older respondents demonstrated more engagement with the correspondence received from their electricity supplier, with those aged 65 and over more likely to read it compared to those aged 18 to 34, who were more likely to report that they did not open the last piece of correspondence they received. Younger respondents were also less likely than all other age groups to report that they were aware that they can choose between different electricity suppliers.

However, the results from the 2024 Tracker found that younger consumers were more proactive with their electricity deal. While those aged under 35 and 65 and over were more likely to say they had never switched electricity supplier, of those who had switched supplier, it was those in the younger age group that were more likely to report switching within the last three years. Those aged 65 and over were more likely to report being happy with their current service as a reason for not switching, with 84% in the older age group saying they were satisfied with the overall service provided by their electricity supplier compared to 77% in the younger age group.

Private renters and social housing occupants struggling with their bills

Domestic consumers who privately rent their home and who live in social housing were more likely to report difficulties with their energy bills. Private renters (31%) and social housing occupants (42%) were more likely to sometimes struggle to pay their electricity bill, with those in social housing also more likely to always struggle to pay their bills (5%). Both groups were also more likely to have gone without or delayed getting essentials to pay for their electricity, and to have reduced their electricity usage and borrowed to pay their electricity bills in the past year. In terms of respondents who had gas heating, those who live in social housing were more likely than those who own their home to sometimes struggle with their gas bill; to have gone without or delayed getting essentials, to have reduced their gas usage, and to have borrowed to pay their gas bills in the past year. This is despite respondents who own their home being more likely to spend £100 or more per month on electricity and heating than those in social housing.

Compared with those who own their home, respondents who privately rent and live in social housing were less likely to show engagement with their energy deal. Both groups were less likely to be aware of how they receive written correspondence from their electricity and gas supplier, with private renters more likely to say they did not open the correspondence they

received. Private renters were also less likely to be aware that they can compare electricity deals, to have actually compared their deal, and were more likely to have never switched their electricity supplier.

In terms of awareness of supplier obligations to protect their customers, 53% of those in social housing and 55% of private renters said they were aware of these obligations, compared to 64% of respondents who own their home. 36% of those who privately rent had heard of the support services offered by energy suppliers, in comparison with 46% living in social housing and half (50%) of homeowners. Social housing occupants and private renters were also less likely to be aware of NI Water's support services.

Impact of low confidence in using the internet

16% of respondents rated themselves as being not confident as an internet user (i.e. rated 1 or 2 on a five-point scale). Respondents who rated themselves as being not confident with using the internet were more likely to be unaware of how much they spend on electricity or heating and were less likely to know the format in which they receive correspondence from their electricity supplier. Of those who did report receiving correspondence, it was those who rated themselves as confident internet users who were more likely to say the information was presented in a clear way to understand.

Those who are not confident internet users were more likely to report having to reduce their electricity usage. With regards to consumer protections, those who are not confident internet users were less likely to be aware of supplier obligations and how to make a complaint if these obligations are not met. It is therefore important that resources are made available to those who do not have access or who do not feel comfortable using the internet to allow them to remain engaged with their energy contract.

Low uptake of renewables

Less than 1% of domestic consumers reported that they use renewables or LCTs as their main heating source, while 7% use renewable energy systems for either heating or electricity in their home. The proportion of respondents who use energy efficiency measures has remained consistent, with one quarter (25%) putting measures in place in the last three years compared to 26% in 2023, while those who had not put any measures in place were more likely to say this was because they were already in the home or they had been installed more than three years ago.

Lack of knowledge about the 'Just Transition to Net Zero'

One of the objectives outlined in the Utility Regulator's Corporate Strategy 2024-2029 was 'Supporting the Just Transition to Net Zero'. In order to measure the level of knowledge of the just transition among domestic consumers a new section was added to the 2024 Tracker. Half (50%) of respondents had never heard of the 'Just Transition to Net Zero', with one fifth (20%) saying they had a fair to good understanding. Several subgroups were less likely to be aware of the term:

- 65 plus years olds compared to all other age groups;
- Those in the C2DE group compared to those in the ABC1 group;

- Those living in social housing compared to those who privately rent and own their home;
- Those who consider themselves to not be confident internet users compared to confident users;
- Those in the most deprived areas compared to those in the least deprived areas;
- Those on a prepayment meter for electricity compared to those on a credit meter; and
- Those who have not self-disconnected from their electricity supply compared to those who had self-disconnected.

It is notable that subgroups that were less likely to be engaged in their energy contract, namely over 65s and those on a prepayment meter, were also less likely to be knowledgeable about the 'Just Transition to Net Zero', and so it is important that domestic consumers are kept well informed of any changes to their energy deal following the push towards net zero.

Appendix A - Detailed methodology

Approach

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

Interviewing took place between October 2024 and January 2025 with each interview taking, on average, 20 minutes to complete. Interviewing was carried out in compliance with UK GDPR and the Market Research Society Code of Conduct.

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

Questionnaire design

The questionnaire was designed in collaboration with the Utility Regulator project team. Where possible, questions were designed to allow for comparison with the 2019, 2021, 2022 and 2023 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[14].

Table A1: Demographics of NI domestic energy consumers

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

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

Table A2: Sample stratification

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

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

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

Respondent demographics

The table below indicates the final survey responses achieved by age, gender, socio-economic group and location.[15]

STRATIFICATION VARIABLE		ACHIEVED NO.	ACHIEVED %
Age (HRP)	18 - 34	213	14%
	35 - 44	271	18%
	45 - 64	592	39%
	65 and over	426	28%
	Prefer not to say	0	-
Gender	Male	773	51%
	Female	729	49%
	Other	0	-
SEG[16]	ABC1	731	49%
	C2DE	733	49%
	Prefer not to say	38	3%
Urban/Rural	Urban	929	62%
	Rural/Mixed	573	38%
Council	Antrim and Newtownabbey	123	8%
	Ards and North Down	139	9%
	Armagh City, Banbridge and Craigavon	164	11%
	Belfast	269	18%
	Causeway Coast and Glens	122	8%
	Derry City and Strabane	121	8%
	Fermanagh and Omagh	88	6%
	Lisburn and Castlereagh	123	8%
	Mid and East Antrim	99	7%
	Mid Ulster	123	8%
	Newry, Mourne and Down	131	9%
Multiple Deprivation Measure quintile	1 – Most deprived	271	18%
	2	301	20%
	3	315	21%
	4	314	21%
	5 – Least deprived	301	20%
Total		**1502**	**100%**

[15]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.

[16]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	773	51%
Female	729	49%
Total	***1502***	***100%***

Table B.2: Age

Age		
Age	**Count**	**Percentage**
18-34	213	14%
35-44	271	18%
45-64	592	39%
65 plus	426	28%
Total	***1502***	***100%***

Table B.3: Tenure

Tenure		
Tenure	**Count**	**Percentage**
Rent from a private landlord	174	12%
Rent from NI Housing Executive	119	8%
Rent from a housing association	42	3%
Own your home or buying through a mortgage	1148	76%
Refused	19	1%
Total	***1502***	***100%***

Table B.4: Employment status

Employment status		
Employment status	**Count**	**Percentage**
Working full time	650	43%
Working part time	137	9%
Unemployed	147	10%
Retired	526	35%
Student	24	2%
Refused	18	1%
Total	***1502***	***100%***

Table B.5: Means tested benefit

Means tested benefit		
Means tested benefit	**Count**	**Percentage**
Yes	329	22%
No	1155	77%
Don't know	18	1%
Total	***1502***	***100%***

Table B.6: Socioeconomic group

Socioeconomic group		
SEG	**Count**	**Percentage**
AB	359	24%
C1	372	25%
C2	548	36%
DE	185	12%
Refused	38	3%
Total	***1502***	***100%***

Table B.7: Internet access*

Internet access		
Internet access	**Count**	**Percentage**
Access at home	1404	93%
Access outside of home	199	13%
Access using mobile data	270	18%
Do not have access	71	75%

*Multiple choice question

Table B.8: Method of accessing internet*

Method of accessing internet		
Method of accessing internet	**Count**	**Percentage**
Home computer/laptop	633	44%
Tablet/ iPad	418	29%
Public work computer/ laptop	203	14%
Mobile/ smartphone	1136	79%
Home of friends or family	131	9%
Smart TV	328	23%
Other	**	0%

*Multiple choice question

Table B.9: Confidence using the internet

Confidence using the internet		
Confidence using the internet	**Count**	**Percentage**
1 – Not at all confident	105	7%
2	132	9%
3	256	17%
4	370	25%
5 – Very confident	639	43%
Total	***1502***	***100%***

Table B.10: English as a first language

English as a first language		
English as a first language	**Count**	**Percentage**
Yes, and speak no other languages	1411	94%
Yes, and speak one or more other languages	67	4%
No	11	1%
Refused	13	1%
Total	***1502***	***100%***

Table B.11: Highest level of education achieved

Highest level of education achieved		
Highest level of education achieved	**Count**	**Percentage**
1 - 4 O levels / CSEs / GCSEs (any grades), Entry Level, Foundation Diploma	103	7%
NVQ Level 1, Foundation GNVQ, Basic Skills	**	0%
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	92	6%
NVQ Level 2, Intermediate GNVQ, City and Guilds Craft, BTEC First / General Diploma, RSA Diploma	28	2%
Apprenticeship	72	5%
2+ A levels / VCEs, 4+ AS levels, Higher School Certificate, Progression / Advanced Diploma	145	10%
NVQ Level 3, Advanced GNVQ, City and Guilds Advanced Craft, ONC, OND, BTEC National, RSA Advanced Diploma	73	5%
Degree (for example BA, BSc), Higher degree (for example MA, PhD, PGCE)	435	29%
NVQ Level 4 - 5, HNC, HND, RSA Higher Diploma, BTEC Higher Level	39	3%
Professional qualifications (for example teaching, nursing, accountancy)	119	8%
Other vocational / work-related qualifications	28	2%
Foreign qualifications	**	0%
None of these	358	24%
Total	***1502***	***100%***

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

Disability, illness and other factors		
Disability, illness and other factors	**Count**	**Percentage**
Chronic/ serious illness	149	10%
Medically Dependent Equipment	30	2%
Oxygen use	17	1%
Physical impairment	73	5%
Unable to answer door	**	0%
Pensionable age	205	14%
Young children aged 5 or under	77	5%
Blind	**	0%
Partially sighted	3	0%
Hearing/ speech difficulties	9	1%
Unable to communicate in English	-	-
Dementia	-	-
Developmental condition	10	1%
Mental health	22	1%
Bereavement	**	0%
Temporary life change	**	0%
Caring for an individual outside the household	15	1%
None of the above	884	59%
Prefer not to say	153	10%

*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	305	20%
2	569	38%
3	249	17%
4	228	15%
5	99	7%
6+	52	3%
Total	***1502***	***100%***

Table B.14: Children under 18 in household

Children under 18 in household		
Children under 18 in household	**Count**	**Percentage**
None	1027	68%
1	155	10%
2	180	12%
3	76	5%
4	28	2%
5+	11	1%
Refused	26	2%
Total	***1502***	***100%***

Table B.16: Location

Location		
Location	**Count**	**Percentage**
Urban	929	62%
Rural	573	38%
Total	***1502***	***100%***

Appendix C - Questionnaire

Introduction questions

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

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

ASK ALL
Code one only

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

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

ASK ALL
Code one only

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

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

ASK ALL

S3 Please can you tell me your age?

Record exact age ☐

Code to age category

Code one only

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

ASK ALL

Code one only

S4 Please state your gender

Male
Female
Other
Rather not say

Section A: Fuel source

ASK ALL

Code one only

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

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

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

ASK ALL

Code one only

A2 Thinking about your energy for heating your home, do you think you will switch from using <ANSWER AT A1> to another energy source in the next 3 years? By this we mean the source such as gas or electricity, not your supplier.

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

If YES at A2

Select all that apply

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

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

If DO NOT use mains gas at A1

Select all that apply

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

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

ASK ALL

Code one only

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

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

Yes
No
Not sure

If YES at A5

Select all that apply

A6a What energy efficiency measures have you put in place?

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

If NO at A5

Select all that apply

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

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

ASK ALL

Select all that apply

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

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

Section B: Payment

Electricity

ASK ALL

Code one only

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

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

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

ASK ALL

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

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

Code one only

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

If have electricity prepayment meter at B2

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

Select all that apply

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

If have electricity prepayment meter at B2

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

Select one only

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

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

ASK ALL
Code one only
B5 Which of the following best describes the tariff you are on for your electricity?

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

ASK ALL
Code one only
B6 How much does your household spend on <ANSWER AT Q1> to heat your home each month? [gas heating or other fuel supply]
If you are not sure of the exact figure then please estimate.

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

Gas
If use mains gas at A1
Code one only
B7 How do you pay for your home heating? [only interested in mains gas heating]
A pre-payment or 'pay as you go' meter is an energy meter that can be installed in homes. With a pre-payment, or 'pay as you go' tariff, you pay for your energy before you use it - usually by adding money to a 'key', key pad or smart card

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

If have gas prepayment meter at B7

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

Select all that apply

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

If have gas prepayment meter at B7

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

Code one only

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

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

Open ended

Ask those who use mains gas at A1

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

Code one only

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

Section C: Your energy supplier

Electricity

ASK ALL

C1 Do you know who your current electricity supplier is?
(if yes please state)

Yes - please state
No
Not sure

ASK ALL
Code one only

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

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

ASK ALL
Code one only

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

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

Ask to those who read or glanced at
Code one only

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

Strongly disagree
Disagree
Neither
Agree
Strongly agree
Not sure

ASK ALL

Code one only

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

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

ASK ALL

Code one only

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

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

ASK ALL

Code one only

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

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

ASK ALL

Code one only

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

Completely aware
Somewhat aware
Not at all aware

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

Code one only

Strongly disagree
Disagree
Neither
Agree
Strongly agree
Not sure

Gas

Ask those who use mains gas at A1

Code one only

C10 Do you know who your current gas supplier is?

Yes - please state
No
Don't know

Ask those who use mains gas at A1

Code one only

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

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

Ask those who use mains gas at A1
Code one only
C12 Thinking about the last time you received written correspondence such as a bill or annual statement from your gas supplier, did you read it?

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

Ask those who read or glanced at it
Code one only
C13 If yes, to what extent do you agree or disagree that the information was presented in a way which was clear and easy to understand?

Strongly disagree
Disagree
Neither
Agree
Strongly agree
Not sure

Ask those who use mains gas at A1
Code one only
C14 To what extent do you trust your gas supplier to treat you fairly in their dealings with you?

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

Ask those who use mains gas at A1
Code one only
C15 To what extent do you trust your gas supplier to give you a fair price?

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

Ask those who use mains gas at A1
Code one only
C16 How satisfied are you with the overall service you receive from your gas supplier?

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

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

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

ASK ALL
Select one only
C18 Would you be willing to pay a little extra on your bill, to allow particular groups of consumers to avail of a discounted tariff?

For example, those on low incomes or with disabilities or illnesses.

1	Yes
2	No
3	Not sure

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 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
D4 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

D5 Have made a complaint to your current gas supplier in the previous 12 months?

Yes
No
Not sure

If complained at D5

Code one only

D6 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 D5

Code one only

D7 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 D5

Code one only

D8 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?

Struggling to pay or debt issue (for example falling behind on your bills, not being able to top up your prepayment meter because of affordability or owing money to your supplier)
Payment issue (any issues with payment method, for example with direct debit issues or wanting to change how you pay for your energy)
Unable to top up a prepayment meter (unable to access facilities to top up, such as getting to a shop)
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

E3 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

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

Struggling to pay or debt issue (for example falling behind on your bills, not being able to top up your prepayment meter because of affordability or owing money to your supplier)
Payment issue (any issues with payment method, for example with direct debit issues or wanting to change how you pay for your energy)
Unable to top up a prepayment meter (unable to access facilities to top up, such as getting to a shop)
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

If yes at E5

Code one only for each

E8 Again thinking back to your most recent contact, please say if you agree or disagree with each of the following statements?

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

Strongly disagree
Disagree
Neither
Agree
Strongly agree
Not sure

My gas supplier was supportive

Strongly disagree
Disagree
Neither
Agree
Strongly agree
Not sure

My gas supplier treated me fairly

Strongly disagree
Disagree
Neither
Agree
Strongly agree
Not sure

Section F: Switching

Electricity

ASK ALL

Code one only

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

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

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

Yes
No
Not sure

If yes at F2
Code one only
F3 How easy or difficult do you believe it is to compare different deals for electricity? Please use a scale of 1 to 5 where 1 is very difficult, and 5 is very easy.

Very difficult
Difficult
Neither
Easy
Very easy
Not sure

ASK ALL
Code one only
F4 How many times, if at all, have you ever switched your electricity supplier?

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

Those who have switched at F4
Code one only
F5 When was the last time you switched your electricity supplier?

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

Those who have switched at F4
Select all that apply

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

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

Those who have switched at F4
Code one only

F7 How did you switch from your previous electricity supplier?

Via the telephone
Via the internet
Via a doorstep seller
Face-to-face (shopping centre, stall at an event etc)
Other (please specify)
Cant remember

Those who have switched at F4
Code one only

F8a 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 Fa8

F8b Why was this a negative experience for you? **Open response**

For those who have not switched F4

Select all that apply

F9 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

F10 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

F11 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
F12 Do you have the option to switch between gas suppliers in your area?

1 - Yes
2 - No
3 – Not sure

If yes at F12
Code one only
F13 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 F13
Code one only
F14 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
F15 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 F15
Code one only
F16 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 F15

Select all that apply

F17 Thinking of the last time you switched gas supplier , what were your main reasons for switching away from your previous gas supplier?

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

If switched at F15

Code one only

F18 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 F15

Code one only

F19a 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 F19a

F19b Why was this a negative experience for you? **Open response**

Those you have NOT switched at F15
Select all that apply
F20 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
F21 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 fallen behind on our electricity bill and owe money to our electricity supplier
Strongly disagree	
Disagree	
Neither	
Agree	
Strongly agree	
Not sure	
4	We've asked our electricity supplier for a bill payment holiday or breathing space
Strongly disagree	
Disagree	
Neither	
Agree	
Strongly agree	
Not sure	
5	We've cancelled the direct debit payment for our electricity bill
Strongly disagree	
Disagree	
Neither	
Agree	
Strongly agree	
Not sure	

Electricity PPM customers	
6	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 fallen behind on our gas bill and owe money to our gas supplier
Strongly disagree	
Disagree	
Neither	
Agree	
Strongly agree	
Not sure	
4	We've asked our gas supplier for a bill payment holiday
Strongly disagree	
Disagree	
Neither	
Agree	
Strongly agree	
Not sure	
5	We've cancelled the direct debit payment for our gas bill
Strongly disagree	
Disagree	
Neither	
Agree	
Strongly agree	
Not sure	

Gas PPM customers	
6	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

ASK ALL

Select all that apply

I7 If you had reduced your energy usage, would you be content for your energy company to contact you to discuss if you need any supports?

Yes
No
Not sure

Section J: Just Transition to Net Zero

ASK ALL

Select one only

J1 How would you rate your understanding of the term 'the Just Transition to net zero'?

Never heard of this terms
Just heard of this term but don't know much about it
A little understanding of the term
A fair understanding of the term
A good understanding of the term

If little to good understanding at J1

Select one only

J2 Who do you believe has the most responsibility for supporting 'the Just Transition to net zero'?

Supporting refers to delivering or taking steps to deliver, as opposed to financially supporting.

Local council
Stormont / NI Assembly
Westminster
Energy suppliers
Energy regulators
Consumers
Distribution Network Operators (DNOs)
Other (please specify)
Not sure

Section K: Final Demographics

ASK ALL

Select one only

K1 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

K2 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

K3 Do you or anyone in your household receive a means tested benefits (other than Child Benefit)?

Yes
No
Don't know

ASK ALL

K4 What is the occupation of the chief income earner in your household?

Open ended (to code SEG)

ASK ALL

Select all that apply

K5 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 K5

Select all that apply

K6 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

K7 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

K8 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

K9 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

K10 There are a wide range of factors that could mean anyone might need extra help or support. Do you feel that any of the following factors apply to you or anyone in your household at the moment?

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

ASK ALL

Code one only

K11 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

K12 How many children under the age of 18 live in your household? ☐

ASK ALL

Code one only

K13 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