Domestic Consumer Insight Tracker Survey

Report prepared for the Utility Regulator

July 2026

Contents

1. Key insights: an executive summary/ 1
2. Introduction / 13
3. Methodology / 17
4. Heating types and current energy supplier / 21
5. Payment / 30
6. Interaction with energy suppliers / 55
7. Complaint handling / 78
8. Switching / 81
9. Payment difficulties / 107
10. Consumer protections / 137
11. Support services / 143
12. Conclusions and recommendations / 152

Appendix A – Detailed methodology / 158
Appendix B – Detailed demographics / 162
Appendix C – Questionnaire / 167

perceptive insight

Tables and figures

2. Introduction
Figure 1: Overview of the Utility Regulator's Corporate Strategy 2024-2029 14
Figure 2: Overview of the Utility Regulator's Consumer Protection Programme 2024-2029 15

4. Heating types and current energy supplier
Figure 4.1 Energy type usage 22
Figure 4.2 Mains gas usage by gender, age, SEG and location 23
Figure 4.3 Renewable energy systems or LCTs 24
Figure 4.4 Likelihood of switching energy source 25
Table 4.1 Intentions to switch heating source by age 25
Figure 4.5 Electricity supplier 26
Figure 4.6 Gas supplier 27
Figure 4.7 Energy efficiency measures 28
Figure 4.8 Reasons for not installing energy efficiency measures 29

5. Payment
Figure 5.1 Monthly electricity spend 31
Figure 5.2 Monthly electricity spend by age and socioeconomic group 32
Figure 5.3 Monthly electricity spend by tenure and location 33
Figure 5.4 Monthly electricity spend by deprivation 34
Figure 5.5 Monthly electricity spend by disability, children and vulnerability 35
Figure 5.6 Monthly electricity spend by internet access and confidence using the internet 36
Figure 5.7 Monthly electricity spend by electricity payment method, electricity switching, and electricity self-disconnection 37
Figure 5.8 Monthly spend on heating 38
Figure 5.9 Monthly spend on heating by age, disability/illness, children, and vulnerability 39
Figure 5.10 Monthly spend on heating by tenure, location and confidence using the internet 40
Figure 5.11 Monthly spend on heating by payment method 41
Figure 5.12 Monthly spend on heating by electricity switching and electricity self-disconnection 42
Figure 5.13 Electricity payment method 43
Table 5.1 Electricity payment method by confidence using the internet 43
Figure 5.14 Electricity tariff 44
Figure 5.15 Gas payment method 45
Figure 5.16 Gas tariff 46
Figure 5.17 Reasons for having a prepayment meter for electricity 47
Figure 5.18 Preference for electricity payment method 48
Figure 5.19 Reasons for having a prepayment meter for gas 49
Figure 5.20 Preference for gas payment method 50
Figure 5.21 Paying extra on energy bill 51
Table 5.2 Paying extra on energy bill by disability/illness, children and vulnerability 52
Figure 5.22 Paying extra on energy bill to allow particular consumer groups to avail of a discounted tariff 53
Table 5.3 Paying extra on energy bill to allow particular consumer groups to avail of a discounted tariff by disability/illness, children and vulnerability 54

6. Interaction with energy suppliers
Figure 6.1 Form of written correspondence from electricity supplier 56
Table 6.1 Form of written correspondence from electricity supplier by payment method and self-disconnection 57
Figure 6.2 Approach to receiving written correspondence from electricity supplier 57
Table 6.2 Approach to receiving written correspondence from electricity supplier by age and payment method 58
Figure 6.3 Understanding of written correspondence from electricity supplier 58
Table 6.3 Understanding of written correspondence from electricity supplier by disability/illness, children, and vulnerability 59
Figure 6.4 Form of written correspondence from gas supplier 60

Table 6.4 Form of written correspondence from gas supplier by gas payment method 60
Figure 6.5 Approach to receiving written correspondence from gas supplier 61
Table 6.5 Approach to receiving written correspondence from gas supplier by gas payment method 61
Figure 6.6 Understanding of written correspondence from gas supplier 62
Figure 6.7 Trust in electricity supplier to treat customer fairly in dealings 63
Table 6.6 Trust in electricity supplier to treat customers fairly by tenure, children and electricity self-disconnection 64
Figure 6.8 Trust in electricity supplier to provide a fair price 65
Table 6.7 Trust in electricity supplier to provide a fair price by tenure, children, vulnerability and electricity self-disconnection 66
Figure 6.9 Trust in gas supplier to treat customer fairly in dealings 67
Table 6.8 Trust in electricity supplier to provide a fair price by vulnerability..67
Figure 6.10 Trust in gas supplier to provide a fair price...68
Figure 6.11 Satisfaction with overall service provided by electricity supplier 69
Table 6.9 Satisfaction with overall service provided by electricity supplier by electricity switching and electricity self-disconnection 70
Figure 6.12 Satisfaction with overall service provided by gas supplier 70
Figure 6.13 Contact with electricity supplier in the last 12 months 71
Figure 6.14 Reasons for contacting electricity supplier 72
Figure 6.15 Contact with gas supplier in last 12 months 73
Figure 6.16 Ease of contacting electricity supplier 74
Figure 6.17 Experience of interacting with electricity supplier - I felt that my electricity supplier listened to me and understood my issue 75
Figure 6.18 Experience of interacting with electricity supplier - my electricity supplier was supportive76
Figure 6.19 Experience of interacting with electricity supplier - my electricity supplier treated me fairly 76

7. Complaint handling

Figure 7.1 Incidence of making a complaint to energy supplier...78
Figure 7.2 Incidence of unreported complaints to energy supplier 79
Figure 8.1 Awareness of being able to choose between electricity suppliers 82

8. Switching

Table 8.1 Awareness of being able to choose between electricity suppliers by confidence using the internet and electricity switching 83
Figure 8.2 Level of agreement that being able to choose between electricity suppliers gives access to better deals...83
Table 8.2 Level of agreement that being able to choose between electricity suppliers gives access to better deals by age, confidence using the internet, and electricity switching 84
Figure 8.3 Confidence in electricity deal 85
Table 8.3 Confidence in electricity deal by disability/illness, children, confidence using the internet, and electricity switching 86
Figure 8.3 Confidence in gas deal 87
Table 8.4 Confidence in gas deal by payment method and switching behaviour 87
Figure 8.5 Incidence of comparing electricity deal..88
Table 8.5 Incidence of comparing electricity deal by age, confidence using the internet, electricity payment method, and electricity switching 89
Figure 8.6 Ease of comparing electricity deal 90
Figure 8.7 Ability to switch gas supplier...91
Figure 8.8 Ability to switch gas supplier (previous Tracker comparisons) 92
Figure 8.9 Incidence of comparing gas deal 93
Table 8.6 Incidence of comparing gas deal by switching 93
Figure 8.10 Incidence of switching electricity supplier...94
Table 8.7 Incidence of switching electricity supplier by age, disability/illness, children, confidence using the internet, and electricity payment method 95
Figure 8.11 Most recent instance of switching electricity supplier 96
Table 8.8 Most recent instance of switching electricity supplier by age and electricity payment method 97
Figure 8.12 Incidence of switching gas supplier 98
Figure 8.13 Reasons for switching electricity supplier..99
Figure 8.14 Method of switching electricity supplier 100
Figure 8.15 Experience of switching electricity supplier 101

Figure 8.16 Reasons for not switching electricity supplier 102
Figure 8.17 Reasons for not switching gas supplier 103
Figure 8.18 Reasons for not switching to gas heating 104
Figure 8.19 Likelihood of switching electricity supplier 105
Figure 8.20 Likelihood of switching gas supplier 105
Table 8.9 Likelihood of switching electricity supplier by age, confidence using the internet, and electricity switching 106

9. Payment difficulties

Figure 9.1 Ability to pay electricity bills 108
Figure 9.2 Ability to pay electricity bills by age and SEG 109
Figure 9.3 Ability to pay electricity bills by tenure and location 110
Figure 9.4 Ability to pay electricity bills by deprivation 111
Figure 9.5 Ability to pay electricity bills by disability/illness, children, and vulnerability 112
Figure 9.6 Ability to pay electricity bills by electricity payment method, electricity switching, and electricity self-disconnection 113
Figure 9.7 Ability to pay gas bills 114
Figure 9.8 Ability to pay gas bills by age and SEG 115
Figure 9.9 Ability to pay gas bills by deprivation 116
Figure 9.10 Ability to pay gas bills by disability/illness, children and vulnerability 117
Figure 9.11 Ability to pay gas bills by gas payment method 118
Figure 9.12 Incidence of going without electricity (no prepayment meter) 119
Figure 9.13 Incidence of going without electricity (prepayment meter) 120
Figure 9.14 Reasons for going without electricity 120
Figure 9.15 Incidence of delaying getting essentials to pay for electricity 121
Figure 9.16 Incidence of delaying getting essentials to pay for electricity by SEG and tenure 122
Figure 9.17 Incidence of delaying getting essentials to pay for electricity by disability/illness and vulnerability 122
Figure 9.18 Incidence of delaying getting essentials to pay for electricity by electricity payment method, switching, and self-disconnection 123
Figure 9.19 Essentials delayed or went without to pay for electricity 124
Figure 9.20 Incidence of going without gas (no prepayment meter) 125
Figure 9.21 Incidence of going without gas (prepayment meter) 126
Figure 9.22 Delaying getting essentials to pay for gas 126
Figure 9.23 Length of time without electricity 127
Figure 9.24 Incidence of and methods used to reduce spend on electricity bill 128
Figure 9.25 Reducing electricity usage by disability and illness, vulnerability, and confidence using the internet 129
Figure 9.26 Reducing electricity usage by electricity switching and electricity self-disconnection 130
Figure 9.27 Borrowing money to pay electricity bills by socioeconomic group and tenure 131
Figure 9.28 Borrowing money to pay electricity bills by deprivation 131
Figure 9.29 Borrowing money to pay electricity bills by disability/illness, children, and vulnerability 132
Figure 9.30 Borrowing money to pay electricity bills by electricity payment method, and electricity self-disconnection 132
Figure 9.31 Methods to reduce spend on gas bill 133
Figure 9.32 Reducing gas usage by demographics 134
Figure 9.33 Reducing gas usage by disability/illness and vulnerability 134
Figure 9.35 Borrowing money to pay gas bills by socioeconomic group and deprivation 135
Figure 9.35 Borrowing money to pay gas bills by gas payment method 136

10. Consumer protections

Figure 10.1 Awareness of consumer protection obligations 138
Figure 10.2 Awareness of consumer protection obligations by socioeconomic group and tenure 139
Figure 10.3 Awareness of consumer protection obligations by deprivation 140
Figure 10.4 Awareness of consumer protection obligations by internet access and confidence using the internet 140
Figure 10.5 Awareness of consumer protection obligations by electricity payment method, electricity switching and electricity self-disconnection 141
Figure 10.6 Awareness of how to make a complaint when obligations are not met 142
Table 10.2 Awareness of how to make a complaint when obligations are not met by confidence using the internet 142

11. Support services

Figure 11.1 Awareness of support services offered by energy companies 144
Figure 11.2 Awareness of support services offered by energy companies by socioeconomic group and deprivation 145
Figure 11.3 Awareness of support services offered by energy companies by disability/illness and confidence using the internet 146
Figure 11.5 Awareness of support services offered by energy companies by electricity payment method, switching and self-disconnection 146
Figure 11.7 Use of support services offered by energy companies 147
Table 11.1 Use of support services offered by energy companies by vulnerability and disability/illness 148
Figure 11.8 Satisfaction with support services offered by energy companies N.B. Low bases* 148
Figure 11.9 Awareness of support services offered by NI Water 149
Figure 11.10 Awareness of support services offered by NI Water by socioeconomic group and location 150
Figure 11.11 Awareness of support services offered by NI Water by disability/illness and vulnerability 150
Figure 11.12 Awareness of support services offered by NI Water by confidence using the internet and electricity self-disconnection 151

Appendix A: Detailed methodology

Table A1: Demographics of NI domestic energy consumers 159
Table A2: Sample stratification 159
Table A3: Margin of error 161

Appendix B: Detailed demographics

Table B.1: Gender 162
Table B.2: Age 162
Table B.3: Tenure 162
Table B.4: Employment status 163
Table B.5: Means tested benefit 163
Table B.6: Socioeconomic group 163
Table B.7: Internet access* 163
Table B.8: Method of accessing internet* 164
Table B.9: Confidence using the internet 164
Table B.10: English as a first language 164
Table B.11: Highest level of education achieved 165
Table B.12: Disability, illness and other factors* 165
Table B.13: Number of people in household 166
Table B.14: Children under 18 in household 166
Table B.16: Location 166

1. Key insights: an executive summary

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, 2023, and 2024, 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, 1500 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 September and November 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.

[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.

Key findings and recommendations

These results should be considered in the context of their timing, as data was collected before the recent escalation of geopolitical tensions in the Middle East which may have altered perceptions of energy affordability.

Heating types and current energy supplier

- 59% of respondents use oil to heat their homes, followed by 34% 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.
- 93% of domestic consumers are aware of who their electricity supplier is, with the most common being Power NI (59%) and SSE (19%).
- 95% of those with mains gas were able to recall who their gas supplier is, with the most common being SSE (56%) and then Firmus (42%).
- 26% had installed energy efficiency measures in their home within the last three years, similar to 25% in 2024. Of those who had not installed energy efficiency measures over the last three years, 51% had installed them more than three years ago and 30% said they were already in their home. Loft insulation (70%), cavity wall insulation (48%) and double glazing (29%) 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, the same as in 2024.

Payment

- 33% have electricity bills of at least £100 per month, down from 42% in 2024 and 43% in both 2023 and 2022, but higher than the 13% observed in 2021.
  - Respondents who have someone in their household with a disability or illness (39%, compared to 33% without), who have children in the household (48%, compared to 27% without), and who are in the high and medium vulnerability group (37%, compared to 30% who are not vulnerable) were more likely to spend £100 or more per month.
- The proportion of respondents paying £150 or more per month for their electricity has decreased slightly from 16% in 2023 and 13% in 2024 to 10%.
- 35% of gas respondents have a monthly spend of at least £100, decreasing further from 48% in 2022, 42% in 2023 and 41% in 2024, but still considerably higher than the 9% who reported spending £100 or more on gas in 2021.
- 38% of respondents use a prepayment meter for electricity, while 55% 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 (75% of those with an electricity prepayment meter and 76% of those with a gas prepayment meter).
- The majority of electricity (97%) and gas (97%) 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.

- 78% of electricity and 93% of gas customers stated that they were on a standard variable tariff, the same proportions as the 2023 Tracker.
- 30% of respondents stated that they would be willing to pay a little extra on their bill for future investment (compared to 27% in 2024).
  - 20% would pay extra to provide extra help for customers in vulnerable circumstances, for example, due to health or financial reasons (19% in 2024).
  - 15% would pay extra for projects to protect the environment (19% in 2024).
  - 13% would be willing to pay extra to improve the reliability of the network to help reduce power cuts and maintain supply (10% in 2024).
- 21% indicated they would be willing to pay extra on their bill to allow particular consumer groups to avail of a discounted tariff, down from 27% in 2024.

Interactions with energy suppliers

- There has been an increase in customer engagement with written communications received from their supplier, with results now more in line with the 2022 Tracker. 54% of electricity customers reported reading their correspondence in full (compared to 42% in 2024, 50% in 2023 and 56% in 2022) while 53% of gas consumers reported reading their correspondence in full (compared to 41% in 2024, 49% in 2023 and 54% in 2022).
- Similar proportions reported receiving correspondence from their electricity supplier in the post (41%) and via email or online (40%), while gas customers were more likely to receive correspondence through the post (49%, compared to 24% through email or online).
- Of those respondents who had glanced at or read their written correspondence, there has been an increase in understanding of this correspondence.
  - 85% of electricity respondents agreed or strongly agreed that the information was clear and understandable (compared to 76% in 2024); and
  - 84% of gas consumers agreed or strongly agreed that the information was clear and understandable (compared to 73% in 2024).
- Overall levels of trust in electricity suppliers have increased from 2024:
  - 73% trusted their supplier to treat them fairly (compared to 67% in 2024); and
  - 70% trusted their supplier to give them a fair price (compared to 60% in 2024).
- There has also been an increase in levels of trust amongst gas customers since the previous Tracker:
  - 75% trusted their supplier to treat them fairly (compared to 65% in 2024); and
  - 72% trusted their supplier to give them a fair price (compared to 61% in 2024).
- There has been an increase in consumer satisfaction with overall service from suppliers:
  - 87% of domestic consumers reported being satisfied or very satisfied with their electricity supplier (compared to 80% in 2024); and
  - 86% were satisfied or very satisfied with their gas supplier (compared to 75% in 2024).
- 8% 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 (16%), switching energy contract (14%), and a payment issue (10%).
- Of those that made contact; 78% found it easy to get in touch, 86% thought they were listened to, 84% felt they were treated fairly, and 83% said that their electricity supplier was supportive.
  - This is an improvement on the previous Tracker, in which 77% thought they were listened to, 72% felt they were treated fairly, and 72% said that their electricity supplier was supportive.

Complaint handling

- 4% of electricity and 3% of gas respondents had made a complaint to their electricity or gas supplier in the past year.
- 2% of respondents who haven't complained to their electricity in the past year stated that they had wanted to make a complaint but either weren't sure how, never got round to it, or did not think it would make a difference. 1% of respondents felt the same way about their gas supplier.

Switching

- There was a high level of overall awareness (96% were completely or somewhat aware) of being able to choose between different electricity suppliers amongst respondents:
  - 74% of those consumers agreed that having this choice gives access to better deals (similar to 75% in 2024);
  - 46% had compared electricity deals to see if they could switch supplier or tariff, the same proportion as in 2024; and
  - 42% 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 and 36% in 2024.
- 52% of electricity consumers and 48% of gas customers were confident that they are on the best energy deal for them.
- 45% of domestic consumers have switched their electricity supplier at least once at any time, a slight decrease from 47% in the 2024 Tracker:
  - Of those who have ever switched, 74% have done so within the last three years (similar to 75% in 2024);
  - In contrast, only 9% of those who have the option had switched gas suppliers.
- Respondents aged 65 and over, who are not confident with using the internet and who have a credit meter for electricity were among the subgroups who were less likely to have switched their electricity supplier at any time.
- Feeling they were overpaying (47%) and reacting to a promotional offer from another supplier (32%) were the main drivers for switching electricity supplier.
- 34% of electricity consumers who had switched did so through a doorstep seller, down from 40% in 2024.
- 82% reported a positive experience with switching electricity supplier.
- Of those respondents who had never switched electricity supplier, 72% had never switched due to satisfaction with their current service, while 29% thought it would be too much hassle, decreasing from 40% in 2024[3].
- Of those respondents who had never switched gas supplier 67% had never switched due to satisfaction with their current service, which is an increase from 54% in 2024. 16% said it would be too much hassle, decreasing from 28% in 2024.
- 18% of electricity and 12% 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:

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

- Almost all (98%) confident internet users were aware they could choose between electricity suppliers;
- 54% of those who are confident internet users said they had compared electricity deals compared to 25% who are not confident; and
- Two thirds (68%) of respondents who are not confident internet users said they had never switched electricity supplier, compared to 47% of confident users.

Payment difficulties

- These results should be considered in the context of their timing, as data was collected before the recent escalation of geopolitical tensions in the Middle East which may have altered perceptions of energy affordability.
- The proportion of respondents who sometimes struggle to pay their electricity bills has decreased further from 39% in 2022, 33% in 2023 and 23% in 2024 to 10% in the current Tracker:
    - The proportion who sometimes struggle with their electricity bills is now similar to the 2021 Tracker (13%).
    - 1% often or always struggle to pay, similar to 2024 (3%).
- For gas, the proportion of consumers who sometimes struggle to pay has also decreased further from 33% in 2022, 36% in 2023 and 27% in 2024 to 17% in the current Tracker:
    - The proportion who said they sometimes struggle with their gas bills is again now similar to what was observed in 2021 (15%).
    - 1% often or always struggle to pay, similar to 2% in 2024.
- 15% 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 a decrease from 2024 in which 24% with a prepayment meter had gone without electricity.
    - Of those who had gone without electricity, 36% reported that it was because they could not afford to top up.
- 3% of consumers reported that they have had to delay or go without other essentials so that they could pay for electricity, a reduction from 6% in 2024.
- 7% reported delaying or going without other essentials to pay for gas compared to 8% in the 2024 Tracker.
- 33% of respondents have reduced their electricity usage over the last year, which follows on from 42% in the 2024 Tracker, 71% in the 2023 and 85% in 2022.
- 2% of electricity respondents had borrowed money to pay their electricity bills, down from 5% in 2024.
- This was also true for gas customers, with 36% reducing their usage (42% in 2024, 71% in 2023 and 87% in 2022) and 3% borrowing money to pay their bill (6% in 2024).
- 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 remained the same from the previous Tracker (61% in 2024 and in 2025).
  - However, the proportion who are completely aware has increased from 32% in the previous Tracker to 36% in 2025.
  - Two thirds (65%) of those who consider themselves to be confident internet users said they were aware of these obligations, compared to half (51%) of those who are not confident internet users.
- Four in five (80%) 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 76% in 2024.
- Respondents who are not confident internet users (75%) were less likely than confident users (82%) to know how to go about making a complaint if these obligations are not met.

Support services

- 47% of respondents were aware of the support services offered by energy companies, including 22% who knew a bit about the services offered.
  - This compares to 47% who were aware overall and 36% who knew about the services offered in the 2024 Tracker.
  - Respondents who are not confident internet users (40%) were least likely to be aware of the support services.
  - 3% of all participants were signed up to or had utilised some of the support services offered by energy companies.
- The majority (94%) of those in the high or medium vulnerability group had not signed up to utilise any of the support services offered by energy companies. 90% who have or live with someone who has a disability or illness had not signed up for any of these support services.
- 30% were aware of the services for vulnerable consumers that NI Water provides, an increase from 20% in 2024.

Conclusions and recommendations

Energy bill pressure is easing, but awareness of energy spend has fallen

The results from the 2025 Domestic Tracker show that there has been a fall in consumers who report that they are struggling with their bills, with the findings now more similar to those observed in 2021[4]. However, the results should be considered in the context of their timing, as data was collected before the recent escalation of geopolitical tensions in the Middle East which may have altered perceptions of energy affordability.

10% said they sometimes struggled with their electricity bills over the past year, which is down from 23% in 2024, 33% in 2023, and 39% in 2022 and similar to 13% in 2021. 17% of gas customers stated that they sometimes struggled with their bills, falling from 27% in the

[4] The findings are more similar to those observed in 2021, before the invasion of Ukraine led to a rise in wholesale energy costs.

previous Tracker, 36% in 2023, and 33% in 2022, and similar to 15% in 2021. Fewer respondents also reported having to delay or go without essentials to pay for electricity, as well as having to reduce their electricity and gas usage and to have to borrow to pay their bills over the past 12 months. These findings were again similar to those obtained in the 2021 Tracker. However, it should be noted that several subgroups were more likely to report that they were struggling with their energy bills.

Around one in five (18%) of those with a prepayment meter for electricity stated that they sometimes struggled with their electricity bills in the past 12 months compared to 6% of those with a credit meter, with those on a prepayment meter for electricity also more likely to have gone without or delayed getting essentials to pay for electricity (6%, compared to 1% with a credit meter) and to have borrowed to pay for electricity (5%, compared to 1% with a credit meter). Respondents who have a prepayment meter for gas were also more likely to report sometimes struggling with their gas bills and having to go without or delaying getting essentials to pay for gas when compared to those with a credit meter.

Homeowners were less likely to say that they sometimes struggled with their electricity bills (7%, compared to 19% who privately rent and 28% in social housing), to have gone without or delayed getting essentials to pay for electricity (1%, compared to 7% who privately rent and 10% in social housing), and to have borrowed to pay for electricity in the past 12 months (1%, compared to 6% who privately rent and 10% in social housing).

One third (33%) of consumers reported that they spend £100 or more per month on electricity, down from 42% in 2024. 29% stated they spend £100 or more per month on their heating, falling from 45% in the previous Tracker and from 43% in the 2023 and 2022 Trackers. However, 13% were unaware of their electricity cost, the highest proportion across all previous Trackers, and one quarter (24%) of consumers were unaware of how much they spend per month on heating, increasing from 12% in 2024 and similar to 21% in 2023 and 22% in 2022. Those living in the most deprived areas were more likely than those in the least deprived areas to indicate that they were aware of their electricity spend, suggesting that those who are worst off are more aware of how much they are spending.

Greater engagement with supplier correspondence

The 2025 Tracker found that a greater proportion of consumers were now reading correspondence from their supplier. Over half reported that they read the last correspondence they received from their electricity supplier (54%), increasing from 42% in 2024 and 50% in 2023 to be similar to 56% in 2022. Over half (53%) of gas customers said they read the last correspondence they received from their supplier, increasing from 41% in 2024 and 49% in 2023 to be similar to 54% in 2022. Agreement that the information presented in the correspondence was clear and easy to understand also increased from the 2024 Tracker to be similar to the results observed in 2023.

While those who have a prepayment meter for electricity and for gas were more likely to be aware of their monthly electricity and heating spend, they were less likely to report receiving correspondence from their supplier and were less likely to state that they read the correspondence than those who have a credit meter.

Higher levels of trust and satisfaction in energy suppliers

There has been an increase in both trust and satisfaction with energy suppliers. 73% trust their electricity supplier to treat them fairly, higher than the 2024 (67%) and 2022 Trackers (63%) and similar to the 2023 (70%) and 2021 (69%) Trackers. 70% trust their electricity supplier to provide a fair price, higher than all previous Trackers. For gas customers, 75% said they trust their supplier to treat them fairly and 72% trust their supplier to give a fair price, higher than all previous Trackers.

Homeowners were, however, more likely to show distrust in their electricity supplier. 11% said that they distrust their electricity supplier to treat them fairly in their dealings compared to 4% who privately rent and 5% living in social housing, while 14% who own their home stated that they distrust their electricity supplier to provide a fair price, in comparison with 4% who privately rent and 8% who are in social housing. Electricity self-disconnectors were also less likely to report trust in their supplier to treat them fairly and to provide a fair price.

87% of electricity customers indicated satisfaction with the overall service they receive from their supplier, up from 80% in 2024 and 74% in 2022, and similar to 84% in 2023 and 87% in 2021. 86% of respondents with gas said they were satisfied with the overall service from their supplier, increasing from 75% in 2024 and 70% in 2022 to be more similar to the 2023 and 2021 (both 82%) Trackers. Electricity self-disconnectors were among those less likely to say they were satisfied with the overall service from their supplier.

Vulnerable consumers more likely to be struggling with energy bills

Consumers in the high and medium (HM) vulnerability group demonstrated greater awareness of their monthly energy spending but were also found to be more likely to struggle with their energy bills and to hold more negative views about their suppliers. 90% of those in the HM vulnerability group were aware of their monthly electricity spend compared to 85% not considered to be vulnerable, while four fifths (79%) in the HM vulnerability group were aware of their monthly heating spend, in comparison with 73% who are not vulnerable. Those in the HM vulnerability group were less likely to agree that the information in the correspondence from their electricity supplier was clear and easy to understand, and were also more likely to show distrust in their electricity supplier to provide a fair price, and in their gas supplier to treat them fairly when compared with those who are not vulnerable.

14% of those in the HM vulnerability group reported that they sometimes struggled with their electricity bills over the past 12 months compared to 6% who are not vulnerable, while one quarter (24%) of those in the HM vulnerability group said they sometimes struggle with their gas bills, in comparison to 8% of those who are not vulnerable. Respondents in the HM vulnerability group were also more likely to have:

- Gone without or delayed getting essentials to pay for electricity (5%, compared to 1% not considered to be vulnerable) and gas (9%, compared to 2% who are not vulnerable);
- Reduced their electricity (39%, compared to 27% not considered to be vulnerable) and gas usage in the past year (41%, compared to 30% who are not vulnerable); and

- Borrowed to pay for electricity (4%, compared to 1% who are not vulnerable) in the past year.

Those who have someone in their household with a disability or illness were more likely than those without to disagree that the information in the correspondence received from their electricity supplier was clear and easy to understand, with respondents who have children in their household less likely to agree with this than those who do not have children. Those who have children in their household were also less likely to trust their electricity supplier to treat them fairly and to provide a fair price. Those who have someone in their household with a disability or illness and those with children were less likely to be confident that they were on the best electricity deal and were more likely to have switched electricity supplier at least once. Both groups were also more likely to report that they sometimes struggle with their electricity and gas bills, while incidence of going without or delaying getting essentials, reducing electricity usage and borrowing to pay for electricity was more likely with those who have someone in their household with a disability or illness.

Even though respondents in the high and medium vulnerability group, who have someone in their household with a disability or illness, and who have children in their home were more likely to be struggling with their energy bills, they were also more likely to be willing to be charged extra on their bill for future investment and to allow vulnerable consumers to avail of discounted tariffs.

Low awareness and low uptake of energy supplier support

One fifth (22%) of respondents stated that they were aware of and knew a bit about the support services offered by energy companies to vulnerable consumers, similar to 23% in 2024 but lower than 36% observed in 2023 and 29% in the 2022 Tracker. Uptake of these services also remains low, with 97% of respondents saying they had not used any support services, including 94% of respondents who would be considered vulnerable and 90% of those who have or live with someone who has a disability or illness.

30% of respondents were aware of the services offered to vulnerable customers by NI Water, up from 20% in 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.

Limited change in switching behaviour

Three quarters (75%) of respondents said they were completely aware that they can choose between different electricity suppliers, up from 70% in the previous Tracker but lower than what was observed in 2023 (89%) and 2022 (83%). Incidence of comparing electricity deals was consistent with the 2024 Tracker (46%), but was lower than in 2023 (53%) and 2022 (54%).

45% reported that they had switched their supplier at least once, similar to 47% in 2024, and despite being lower than 51% observed in 2023, is also consistent with the 2022 (44%) and 2021 (46%) Trackers. Three quarters (74%) stated that they last switched their electricity supplier less than three years ago, similar to the 2024 Tracker (75%) and up from the 2023 (71%), 2022 (69%), 2021 (67%) and 2019 Trackers (70%).

Half (49%) of those with a prepayment meter for electricity said they have previously compared electricity deals, compared to 43% of those with a credit meter. Those on an electricity prepayment meter were also more likely to have switched their supplier at least once (48%, compared to 43% with a credit meter) and to have switched less than three years ago (80%, compared to 70% with a credit meter).

72% of those who had never switched their electricity supplier said they were happy with their current service, up from 60% in 2024. Reacting to a promotional offer (32%) and reacting to a doorstep seller (24%) remain the most common drivers for switching electricity supplier, although the use of doorstep sellers to switch fell from 40% in 2024 to 34% in the current Tracker.

18% of respondents stated they would be likely or very likely to switch their electricity supplier in the next 12 months, similar to 16% in 2024 but down from 25% in 2023. 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. 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.

Although electricity switchers were more likely to say they were confident they were on the best electricity deal available to them, they were also more likely to report that they are struggling. 39% of those who switched electricity supplier in the last three years said they spend £100 or more on electricity per month, compared to 31% of non-switchers. 14% of switchers said they sometimes struggled with their bill over the past year compared to 9% of non-switchers. Switchers were more likely to have gone without or delayed getting essentials in order to pay for electricity, and to have reduced their electricity usage in the past 12 months.

Older consumers are more engaged with correspondence but less engaged with their energy deal

Three in five (60%) respondents aged 65 and over stated that they read the last correspondence they received from their electricity supplier, more than any other age group. In contrast, under half (48%) of those aged 18 to 34 said that they had read the correspondence from their electricity supplier. However, those aged 65 and over were less likely to be able to recall how much they spend per month on electricity and heating than those in the younger age group. Younger respondents were more likely than those aged 65 and over to say they will switch their heating source (albeit not within the next three years). While there were no significant differences in awareness of being able to choose between electricity suppliers, older respondents were less likely to agree that having a choice of supplier gives access to better deals.

Respondents aged 65 and over were less likely than all other age groups to say they had compared electricity deals, with 63% confirming they had never switched electricity supplier compared to 51% aged 18 to 34. Older respondents who had switched electricity supplier were also less likely to have done so less than three years ago. Three quarters (75%) of older respondents stated that they would be unlikely to switch electricity suppliers in the next 12 months.

Low confidence with using the internet may restrict access to the best energy deals

94% of respondents reported that they have access to the internet, but one in five (20%) do not consider themselves to be confident internet users. Respondents who are not confident internet users were less likely to be aware of their monthly electricity and heating spend, and were more likely to pay for their electricity using cash. 93% of those who do not consider themselves to be confident internet users said they were aware that they can choose between electricity supplier, compared to almost all (98%) of those who say they are confident users, with those who are not confident less likely to agree that having a choice of supplier gives access to better electricity deals.

44% of those who are not confident internet users (compared to 56% who are confident) said they were confident they were on the best electricity deal available to them, with these respondents less likely to have compared electricity deals (25%, compared to 54% who are confident). As a result, over two thirds (68%) of those who are not confident internet users reported they have never switched their electricity supplier, compared to under half (47%) of those who are confident users, and only 8% said they would be likely to switch their electricity supplier in the next 12 months in comparison to one fifth (22%) of confident users.

Awareness of energy supplier obligations to protect their customers and how to make a complaint if these obligations are not met, along with awareness of the support services offered by energy companies and NI Water to vulnerable customers was also lower amongst those who do not consider themselves to be confident internet users.

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 heating or electricity in their home, the same proportion as in 2024. The proportion of respondents who use energy efficiency measures has also remained consistent with the previous two Trackers, with one quarter (26%) putting measures in place in the last three years compared to 25% in 2024 and 26% in 2023. However, of those who had not installed any measures in the last three years, half (51%) said that they had installed energy efficiency measures more than three years ago, and a further 30% stated that there were already measures in place in their home. 8% mentioned that they would be unable to install any energy efficiency measures as they are renting their property or do not have any control over structural changes.

2% of respondents indicated that they will switch their current energy source within the next three years which is similar to the results from the 2022 (2%), 2023 (3%) and 2024 (3%)

Trackers. However, fewer than 1% of gas customers said that they would be switching their energy source within the next three years or beyond.

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

OUR OBJECTIVES

Supporting the Just Transition to Net Zero	Securing our energy supply, and water and wastewater services	Enabling best in class energy and water companies	Providing the highest level of consumer service and protection

DESIRED OUTCOMES

Supporting the Just Transition to Net Zero	Securing our energy supply, and water and wastewater services	Enabling best in class energy and water companies	Providing the highest level of consumer service and protection
Support the Northern Ireland departments to meet their statutory targets within the Climate Change Act 2022 and related Government Strategic Frameworks.	The energy infrastructure and the market facilitates reliable energy supplies to homes and businesses.	Northern Ireland energy and water companies compare to the best.	Measurable improvement in customer service experience for consumers.
Achievement of the 80% renewables by 2030 statutory target.	Greater physical market interconnection with Great Britain and Ireland.	Enabling long-term, value for money investment that benefits consumers and drives innovation.	New regulatory frameworks are in place to protect consumers in the adoption and use of new technologies.
Supporting the delivery of Northern Ireland's Climate Change Act Sectoral Plans and Carbon Budgets.	Efficient and resilient operation of electricity, gas, and water companies in Northern Ireland.	Energy and water companies are fully compliant with their licence obligations.	Increased data capabilities so that we can produce more evidence- based research to enable positive policy outcomes for current and future consumers.
Just Transition principles are inbuilt within our analysis and decision-making.			Increased reporting on consumer metrics which highlight the performance of energy and water companies.
Work with Ireland's Commission for the Regulation of Utilities, through the Single Electricity Market, to help deliver all island net zero goals.			

STRATEGIC ENABLERS

Being a best practice regulator	Focus on ensuring current and future consumers get the best deal for their regulated energy and water services	Being data-led and providing evidence-based solutions	Being a positive, collaborative, can-do regulator

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

Research & Leadership

Domestic Insight Trackers

Non-domestic Insight Trackers

Just Transition Research

Energy Transition Research

Debt and Affordability Research

Non-domestic Market Study and Gap Analysis

Climate Action Plans

Enablement

Energy Literacy

Information and Publications

Smart Metering

Enhanced Non-Domestic Regulatory Framework

Partnership working

Protection

Price Protection
- Fuel Poverty work
- Debt & disconnections
- Pricing transparency
- Contributions to price controls

Non-Price Protection
- Service Standards
- Vulnerability Protection
- Codes of Practice

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 2024, 2023, 2022, 2021 and 2019 baseline Tracker surveys.

This is a follow-up survey to the 2019, 2021, 2022, 2023 and 2024 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 follows:

- Heating types and current energy supplier;
- Payment;
- Interaction with energy suppliers;
- Complaint handling;
- Switching;
- Payment difficulties;
- Consumer protections; 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.

These results should be considered in the context of their timing, as data was collected before the recent escalation of geopolitical tensions in the Middle East which may have altered perceptions of energy affordability.

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 September and November 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 2024, 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 with physical impairments; who are unable to answer the door; who are aged 65 plus; who are blind or partially sighted; who have hearing or speech difficulties; who have dementia; who have a developmental condition; and who have mental health issues.;
- *Low vulnerability* – includes consumers with children aged under 5; who are unable to communicate in English; who have experienced bereavement; who have had a temporary life change such as a post hospital recovery; 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, 2023 and 2024 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	201	13%
	35 - 44	248	17%
	45 - 64	605	40%
	65 and over	443	30%
	Prefer not to say	3	0%
Gender	Male	759	51%
	Female	737	49%
	Other	4	0%
SEG[9]	ABC1	723	48%
	C2DE	720	48%
	Prefer not to say	57	4%
Urban/Rural	Urban	903	60%
	Rural/Mixed	597	40%
Council	Antrim and Newtownabbey	123	8%
	Ards and North Down	136	9%
	Armagh City, Banbridge and Craigavon	168	11%
	Belfast	265	18%
	Causeway Coast and Glens	122	8%
	Derry City and Strabane	114	8%
	Fermanagh and Omagh	88	6%
	Lisburn and Castlereagh	122	8%
	Mid and East Antrim	110	7%
	Mid Ulster	114	8%
	Newry, Mourne and Down	138	9%
Multiple Deprivation Measure quintile	1 – Most deprived	280	19%
	2	300	20%
	3	308	21%
	4	312	21%
	5 – Least deprived	300	20%
Total		**1500**	**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;
- Intentions to switch heating source;
- Energy supplier; and
- Energy efficiency measures

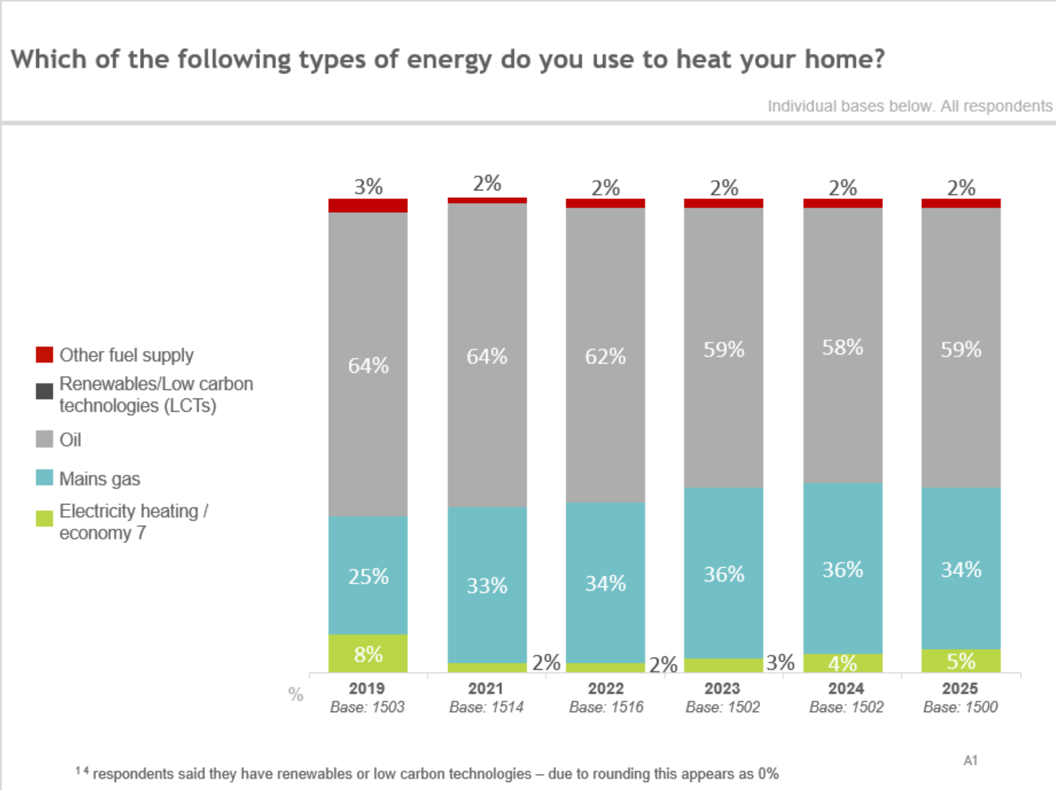
Key findings

- 59% of respondents use oil to heat their homes, followed by 34% 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.
- 93% of domestic consumers are aware of who their electricity supplier is, with the most common being Power NI (59%) and SSE (19%).
- 95% of those with mains gas were able to recall who their gas supplier is, with the most common being SSE (56%) and then Firmus (42%).
- 26% had installed energy efficiency measures in their home within the last three years, similar to 25% in 2024. Of those who had not installed energy efficiency measures over the last three years, 51% had installed them more than three years ago and 30% said they were already in their home. Loft insulation (70%), cavity wall insulation (48%) and double glazing (29%) 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, the same as in 2024.

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 59% of respondents confirming that they have this in their home. One third (34%) reported that they had mains gas.

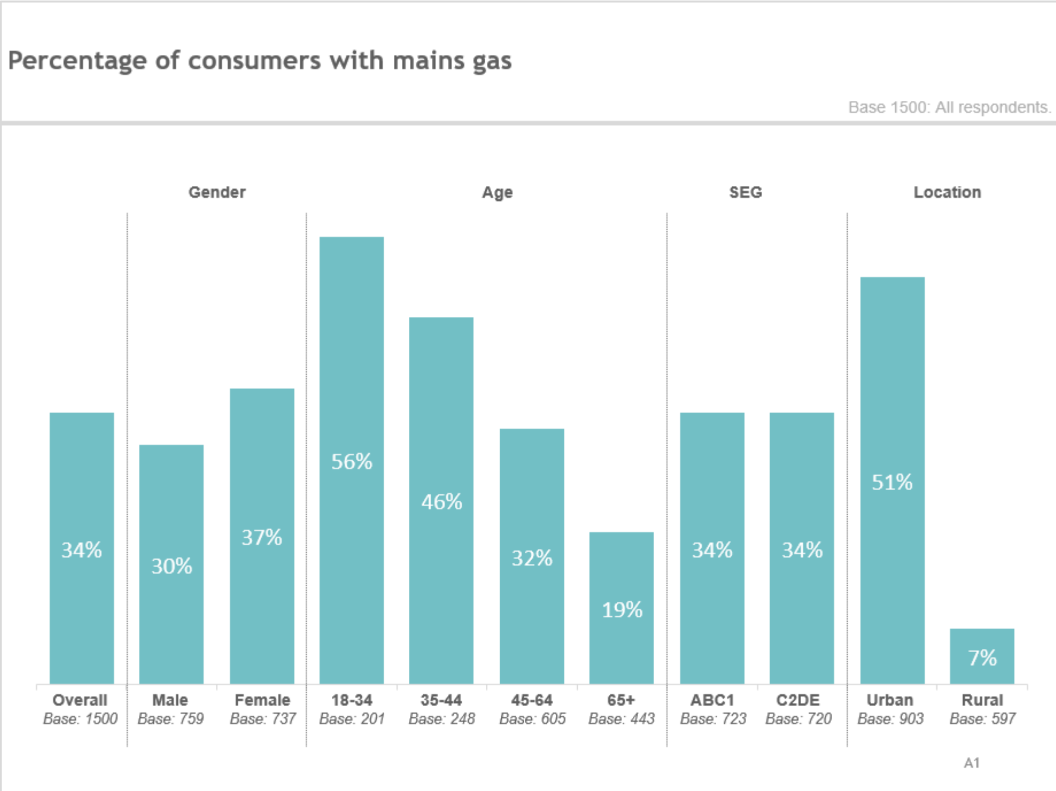
Figure 4.1 Energy type usage



Mains gas use

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

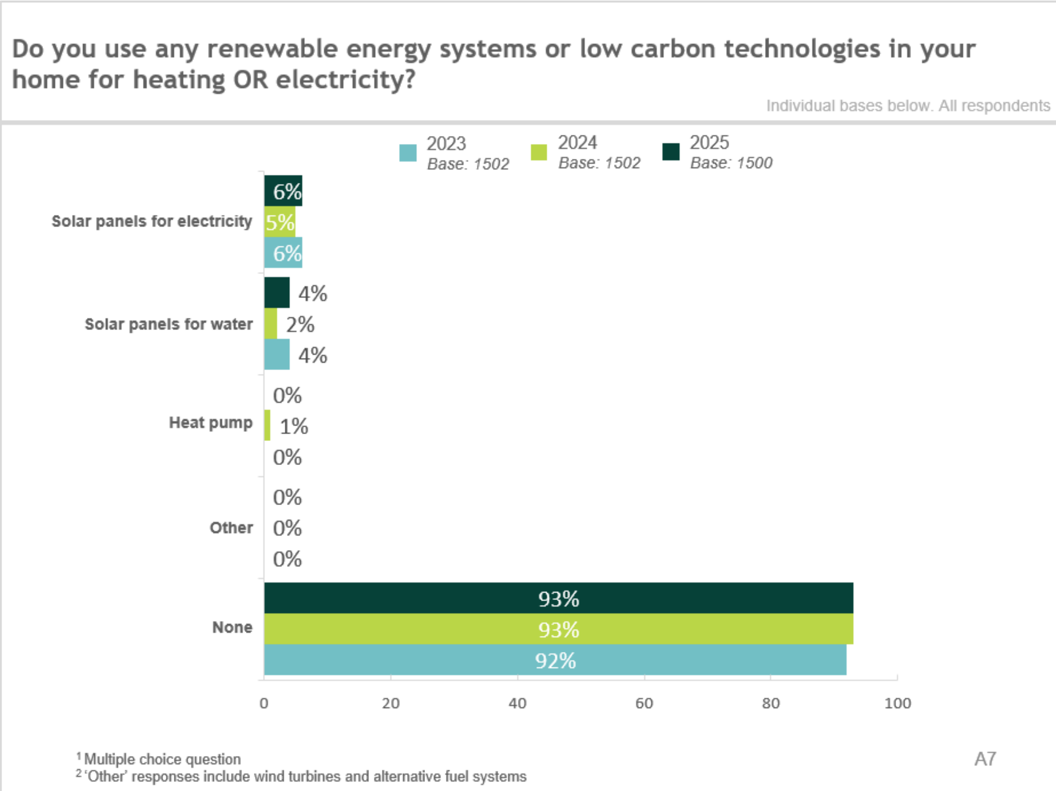
Figure 4.2 Mains gas usage by gender, age, SEG and location



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 2023 and 2024 Trackers. Solar panels for electricity (6%) and water (4%) are the most commonly used types.

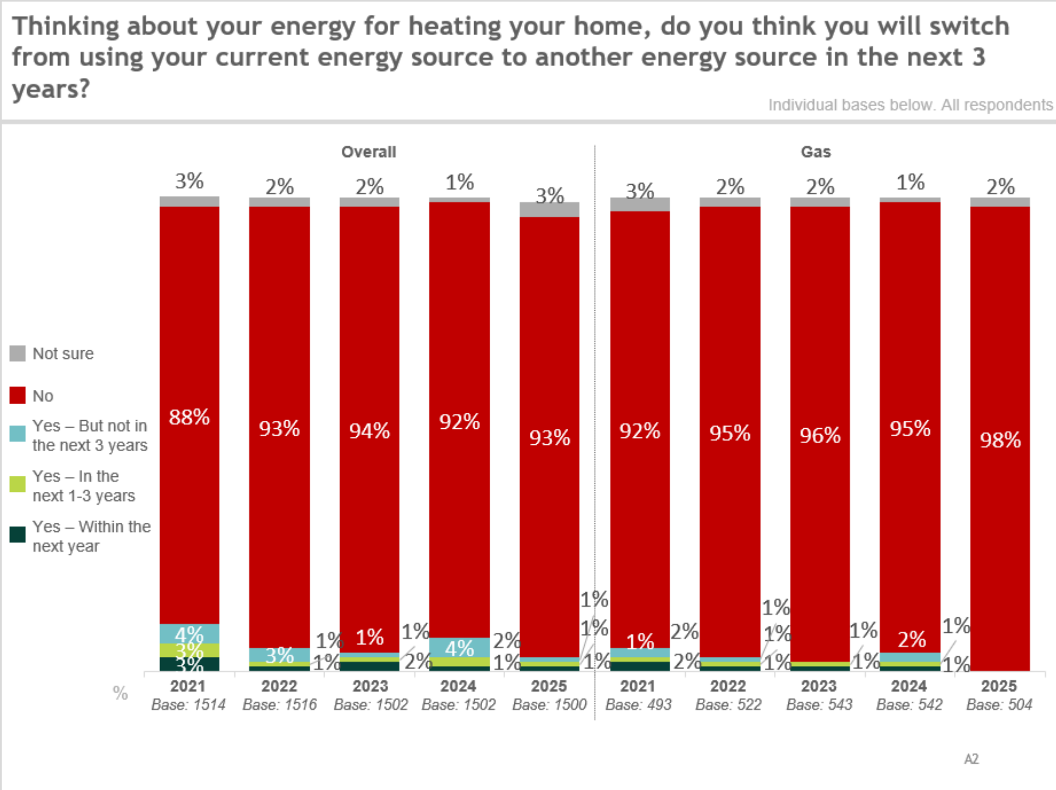
Figure 4.3 Renewable energy systems or LCTs



Intentions to switch energy type

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

Figure 4.4 Likelihood of switching energy source



Respondents aged 18 to 34 (3%) were more likely to say they would switch their heating source than those aged 65 and over (less than 1%), albeit not within the next three years (see Table 4.1)

Table 4.1 Intentions to switch heating source by age

		Yes – within the next year	Yes – in the next 1-3 years	Yes – but not in the next 3 years	No	Not sure	*Total*
Overall	All *Base: 1500*	1%	1%	1%	93%	3%	*100%*
Age	Under 35 *Base:201*	0%	1%	3%	94%	1%	*100%*
	35-44 *Base:248*	1%	2%	1%	94%	2%	*100%*
	45-64 *Base:605*	1%	1%	2%	92%	4%	*100%*
	65 plus *Base: 443*	0%	1%	0%	94%	4%	*100%*

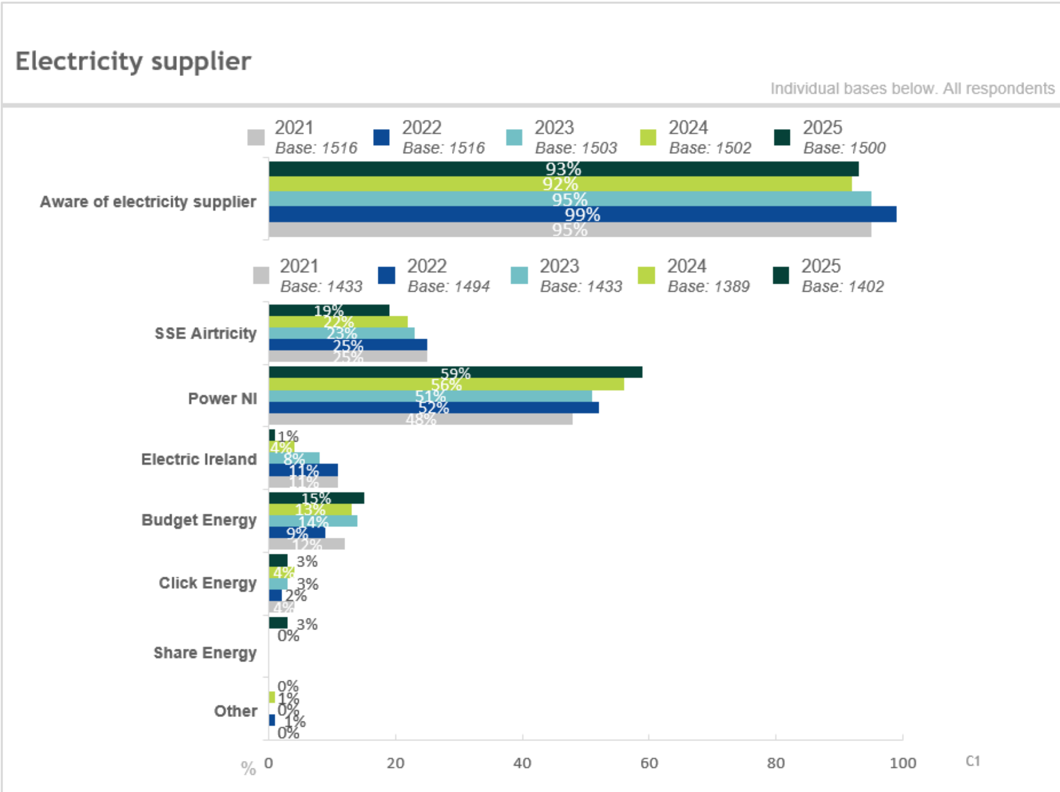
Of those who said they intend to switch their energy source, mains gas (75%, *n=40*) was the most preferred source, followed by oil (13%, *n=7*).

Energy supplier

Electricity supplier

93% of respondents were aware of who their electricity supplier was, similar to 2024 (92%) and 2023 (95%) but lower than the 2022 Tracker (99%). The most common electricity supplier was Power NI at 59%, followed by SSE Airtricity at 19% (see Figure 4.5).

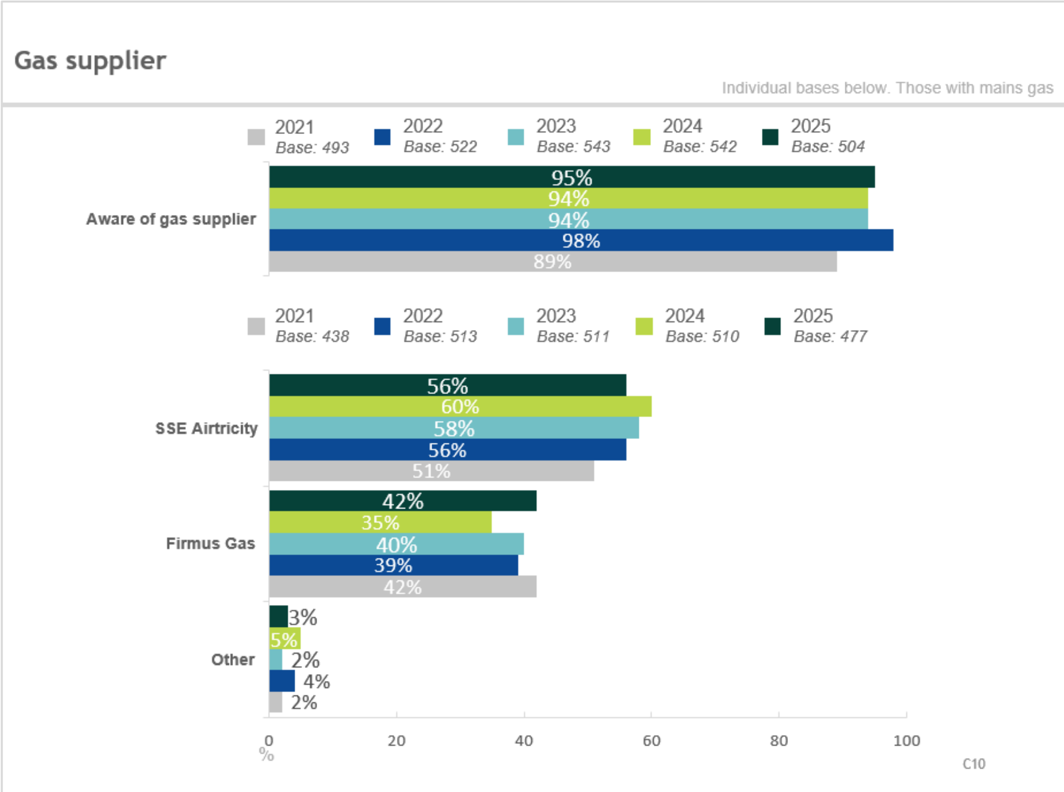
Figure 4.5 Electricity supplier



Gas supplier

The proportion of respondents who are aware of who their gas supplier was similar to the previous two Trackers at 95%, although this is lower than 98% observed in the 2022 Tracker. Of those who are aware, SSE Airtricity was the most common supplier at 56% followed by Firmus Gas at 42% (see Figure 4.6).

Figure 4.6 Gas supplier

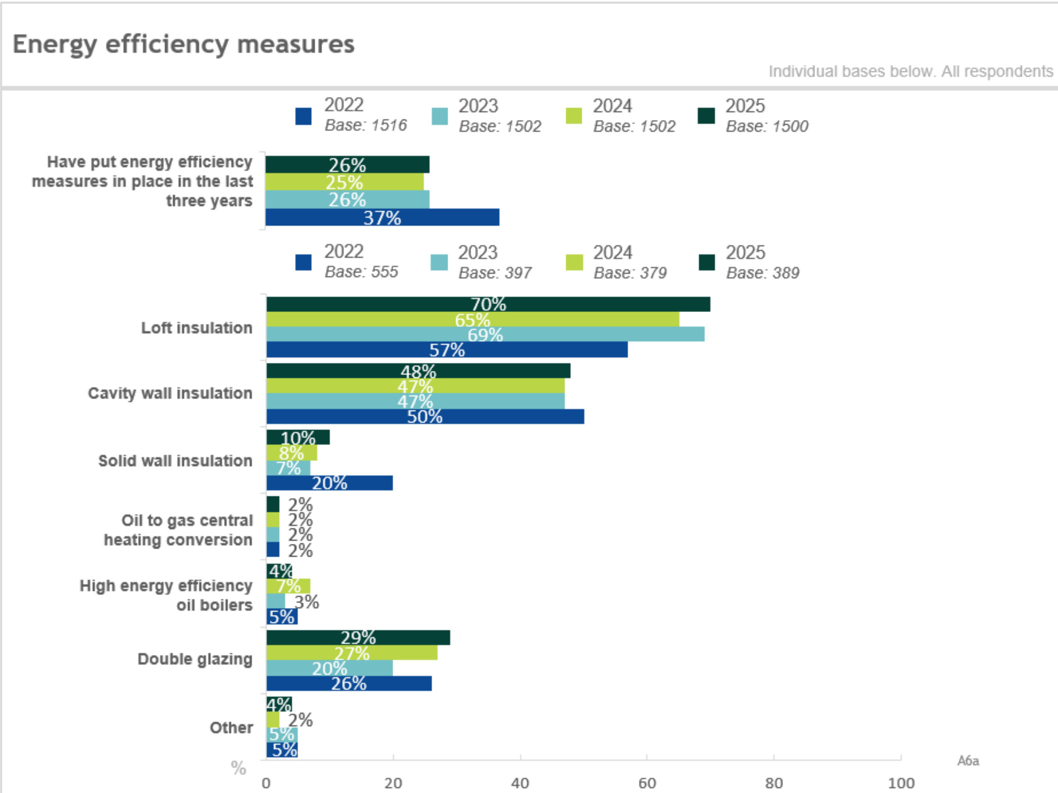


Energy efficiency measures

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).

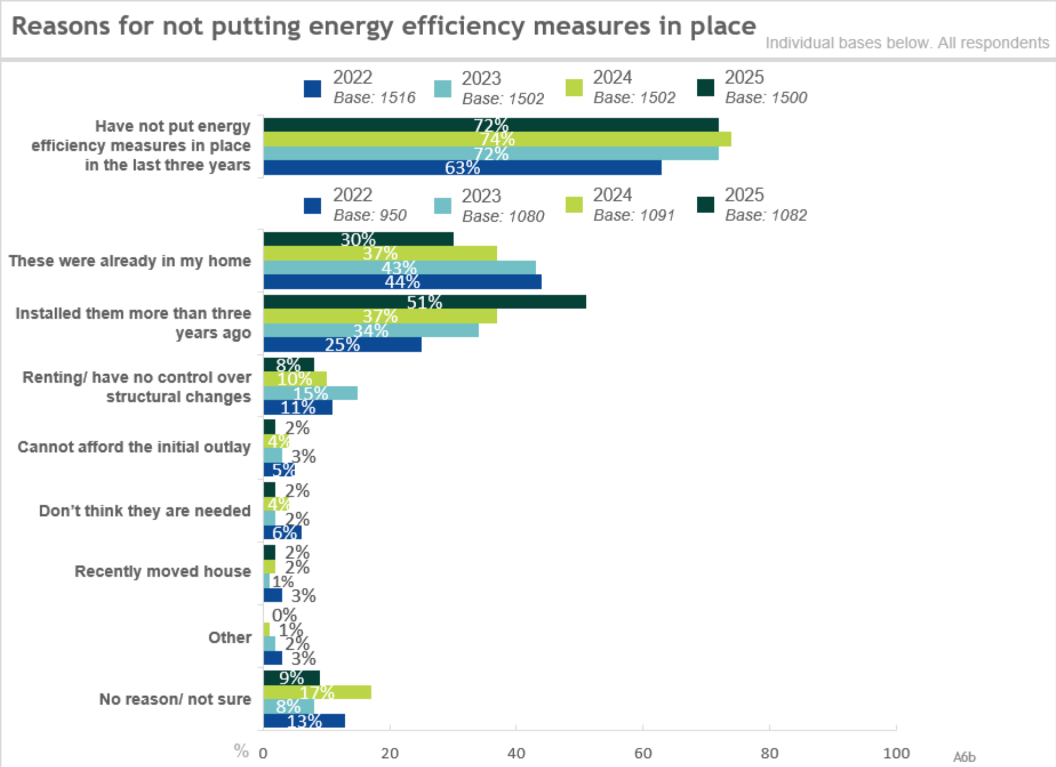
One quarter (26%) of domestic consumers have installed energy efficiency measures in their homes in the last three years, similar to the 2024 (25%) and 2023 Trackers (26%). Loft insulation (70%), cavity wall insulation (48%), and double glazing windows (29%) were the most common measures implemented.

Figure 4.7 Energy efficiency measures



Those who had not put any measures in place were asked for their reasons for not doing this. Half (51%) said they had installed the measures more than three years ago, and 30% stated that the measures were already in place in their home (see Figure 4.8).

Figure 4.8 Reasons for not installing energy efficiency measures



[1] Other responses include lack of information and implementing measures would cause too much disruption

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.

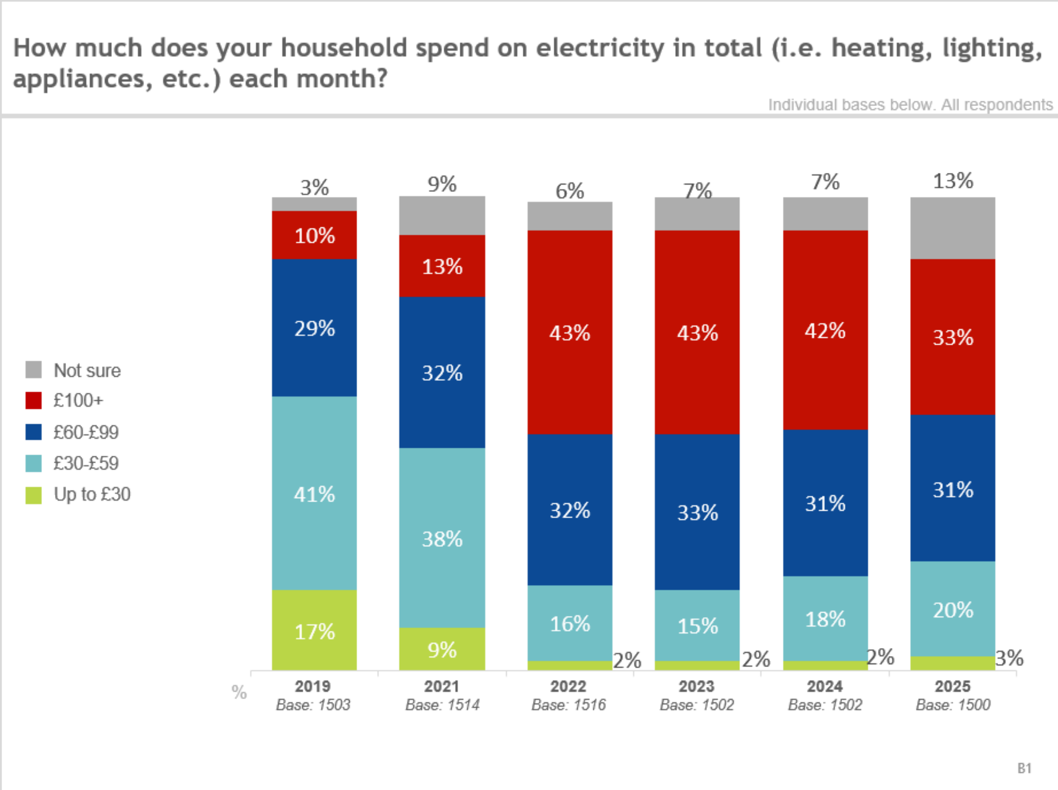
Key findings

- 33% have electricity bills of at least £100 per month, down from 42% in 2024 and 43% in both 2023 and 2022, but higher than the 13% observed in 2021.
  - Respondents who have someone in their household with a disability or illness (39%, compared to 33% without), who have children in the household (48%, compared to 27% without), and who are in the high and medium vulnerability group (37%, compared to 30% who are not vulnerable) were more likely to spend £100 or more per month.
- The proportion of respondents paying £150 or more per month for their electricity has decreased slightly from 16% in 2023 and 13% in 2024 to 10%.
- 35% of gas respondents have a monthly spend of at least £100, decreasing further from 48% in 2022, 42% in 2023 and 41% in 2024, but still considerably higher than the 9% who reported spending £100 or more on gas in 2021.
- 38% of respondents use a prepayment meter for electricity, while 55% 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 (75% of those with an electricity prepayment meter and 76% of those with a gas prepayment meter).
- The majority of electricity (97%) and gas (97%) 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.
- 78% of electricity and 93% of gas customers stated that they were on a standard variable tariff, the same proportions as the 2023 Tracker.
- 30% of respondents stated that they would be willing to pay a little extra on their bill for future investment (compared to 27% in 2024).
  - 20% would pay extra to provide extra help for customers in vulnerable circumstances, for example, due to health or financial reasons (19% in 2024).
  - 15% would pay extra for projects to protect the environment (19% in 2024).
  - 13% would be willing to pay extra to improve the reliability of the network to help reduce power cuts and maintain supply (10% in 2024).
- 21% indicated they would be willing to pay extra on their bill to allow particular consumer groups to avail of a discounted tariff, down from 27% in 2024.

Spend on electricity and heating

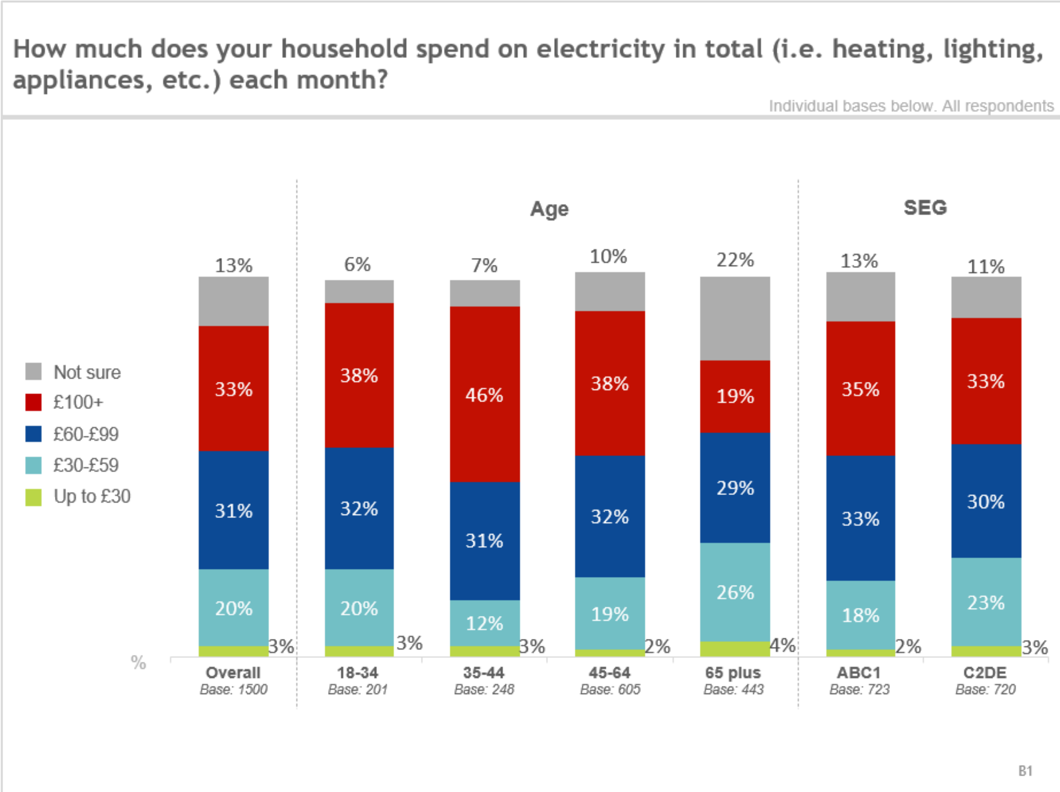
Respondents were asked what their monthly household spend on electricity was (see figure 5.1). 3% reported that they spend up to £30, with 20% saying it was between £30 and £59 and 31% between £60 to £99. Respondents were most likely to spend at least £100 per month (33%), down from 43% in 2022 and 2023 and from 42% in the previous Tracker. 13% said they were unsure of their monthly electricity spend, up from 7% in 2023 and 2024 (see Figure 5.1).

Figure 5.1 Monthly electricity spend



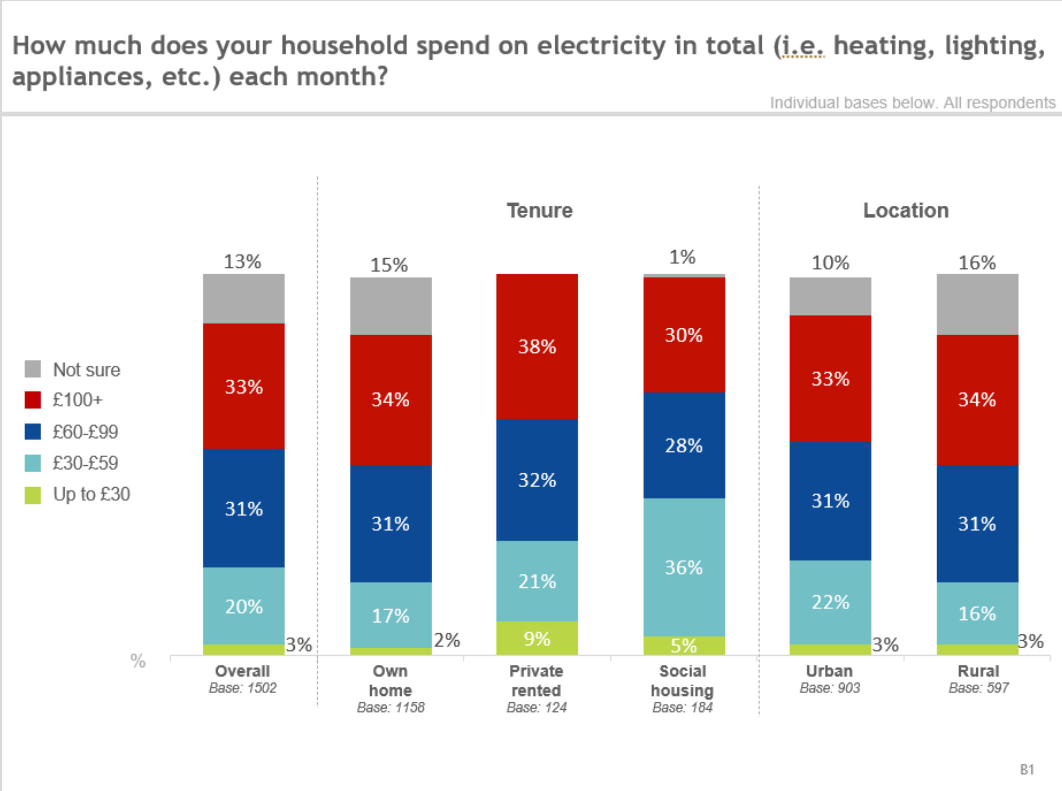
Respondents aged 65 and over (19%) were less likely than all other age groups to spend £100 or more on electricity, but were also less likely than all other age groups to know how much they spend (22%). Those in the C2DE group (23%) were more likely than those in the ABC1 group (18%) to spend between £30 and £59 per month (see Figure 5.2).

Figure 5.2 Monthly electricity spend by age and socioeconomic group



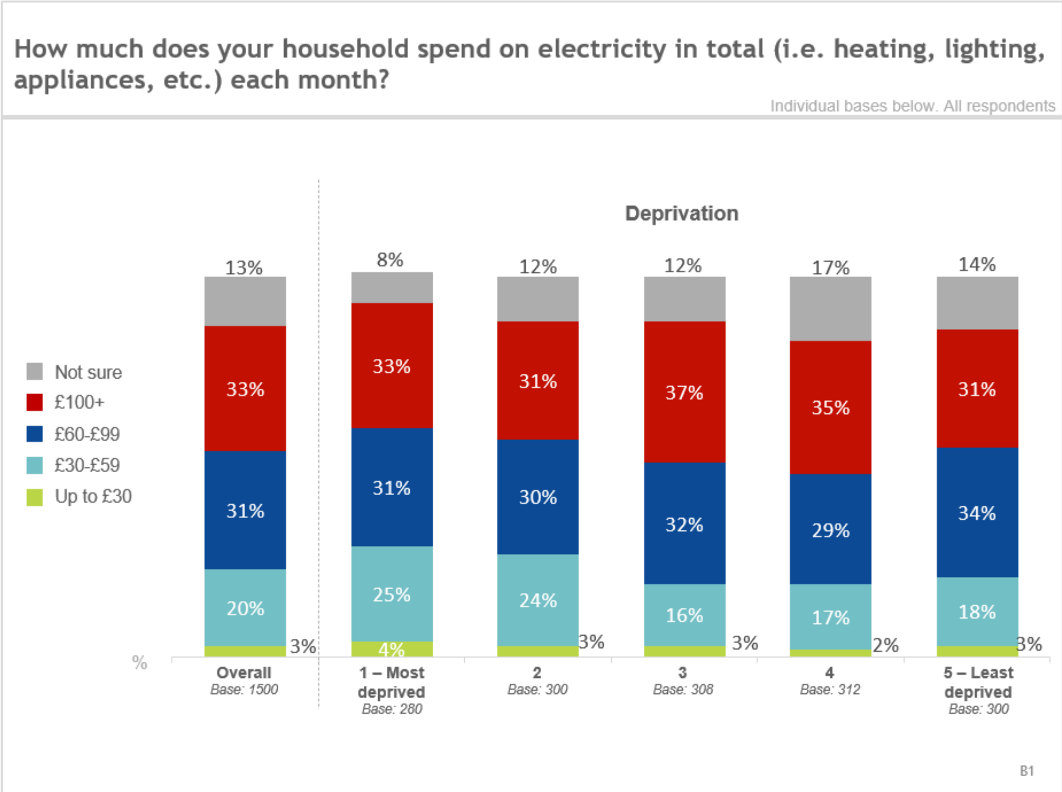
36% of those in social housing reported spending £30 to £59 per month on electricity compared to 21% who privately rent and 17% who own their home. Respondents living in urban areas (22%) were more likely to spend between £30 and £59 per month compared to those in rural areas (16%) (see Figure 5.3).

Figure 5.3 Monthly electricity spend by tenure and location



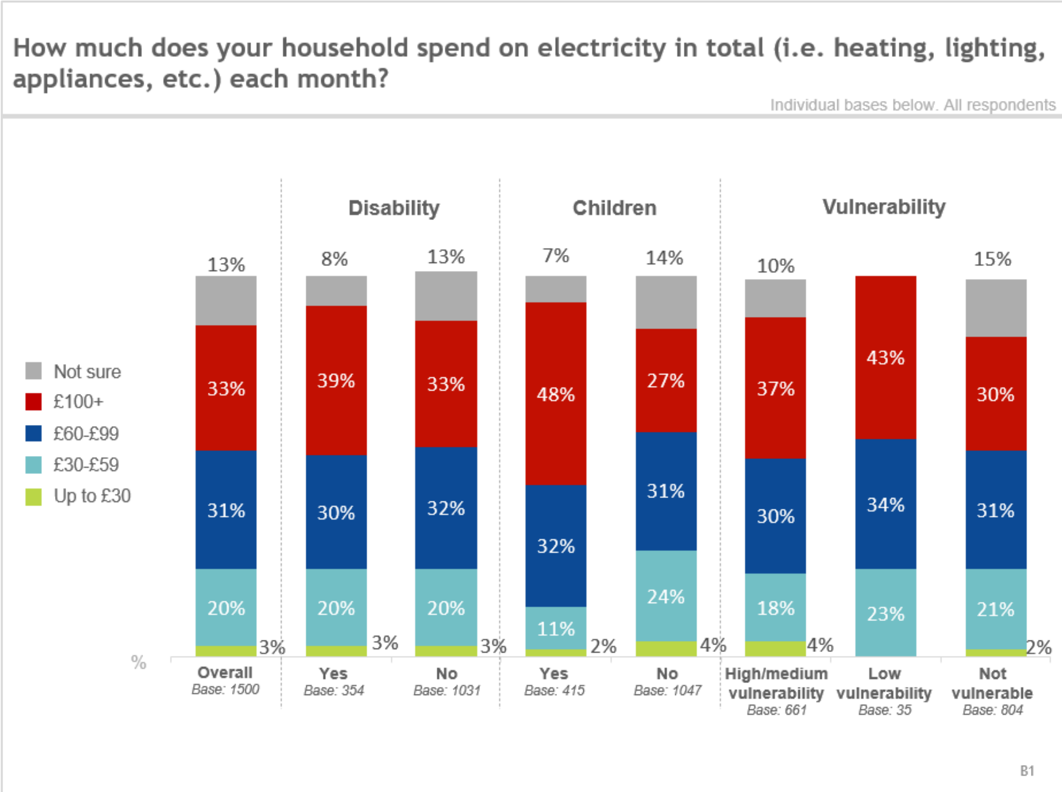
Respondents living in the most deprived areas (92%) were more likely to be aware of their monthly electricity spend than those living in the least deprived areas (86%) (see Figure 5.4).

Figure 5.4 Monthly electricity spend by deprivation



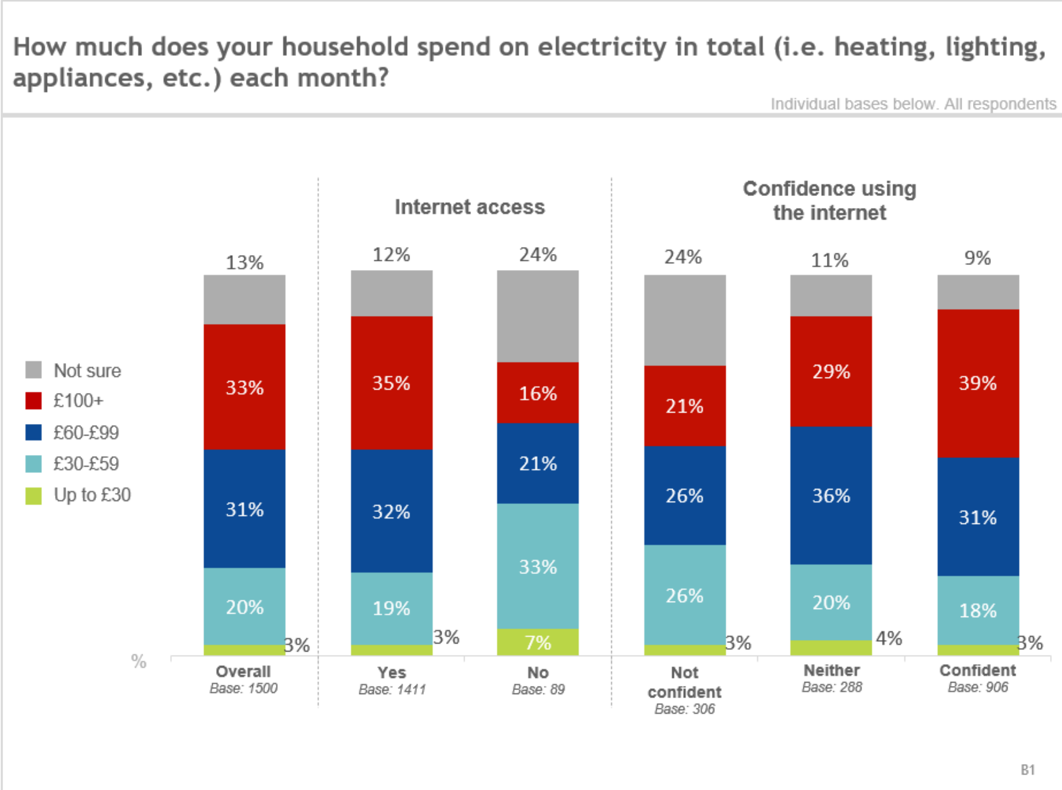
Respondents who have someone in their household with a disability or illness (39%, compared to 33% without), who have children in their household (48%, compared to 27% without), and who are in the high and medium vulnerability group (37%, compared to 30% who are not vulnerable) were more likely to report a monthly electricity spend of £100 or more (see Figure 5.5).

Figure 5.5 Monthly electricity spend by disability, children and vulnerability



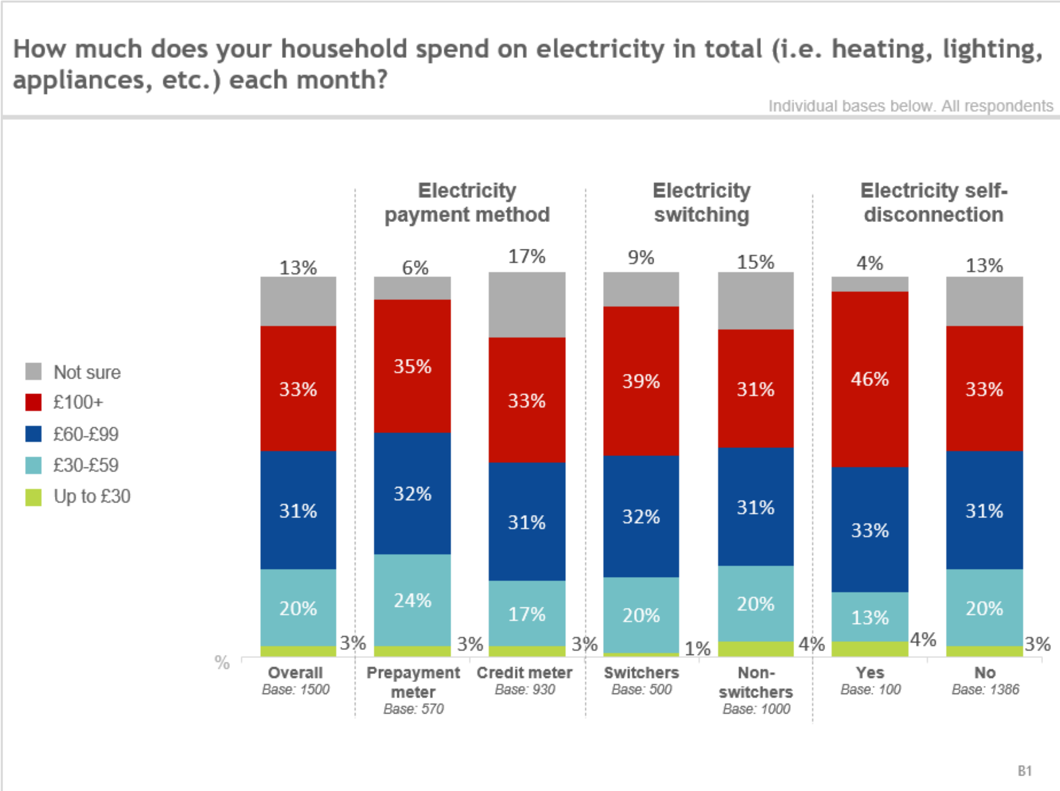
Respondents who have access to the internet (35%) and who consider themselves to be confident internet users (39%) were more likely to report spending £100 per month on electricity than those without access (16%) and who are not confident internet users (21%). However, those without access to the internet (24%, compared to 12% with access) and who are not confident users (24%, compared to 9% of confident users) were less likely to be aware of their monthly electricity spend (see Figure 5.6).

Figure 5.6 Monthly electricity spend by internet access and confidence using the internet



Of those who have a credit meter[10] for electricity, 17% said they did not know how much they spend per month on electricity compared to 6% with a prepayment meter. Respondents who had switched electricity supplier in the last three years (39%) were more likely to say they spend £100 or more per month when compared with non-switchers (31%). 46% of those who have self-disconnected from their electricity supply spend at least £100 per month on electricity, compared to one third (33%) who have not self-disconnected (see Figure 5.7).

Figure 5.7 Monthly electricity spend by electricity payment method, electricity switching, and electricity self-disconnection



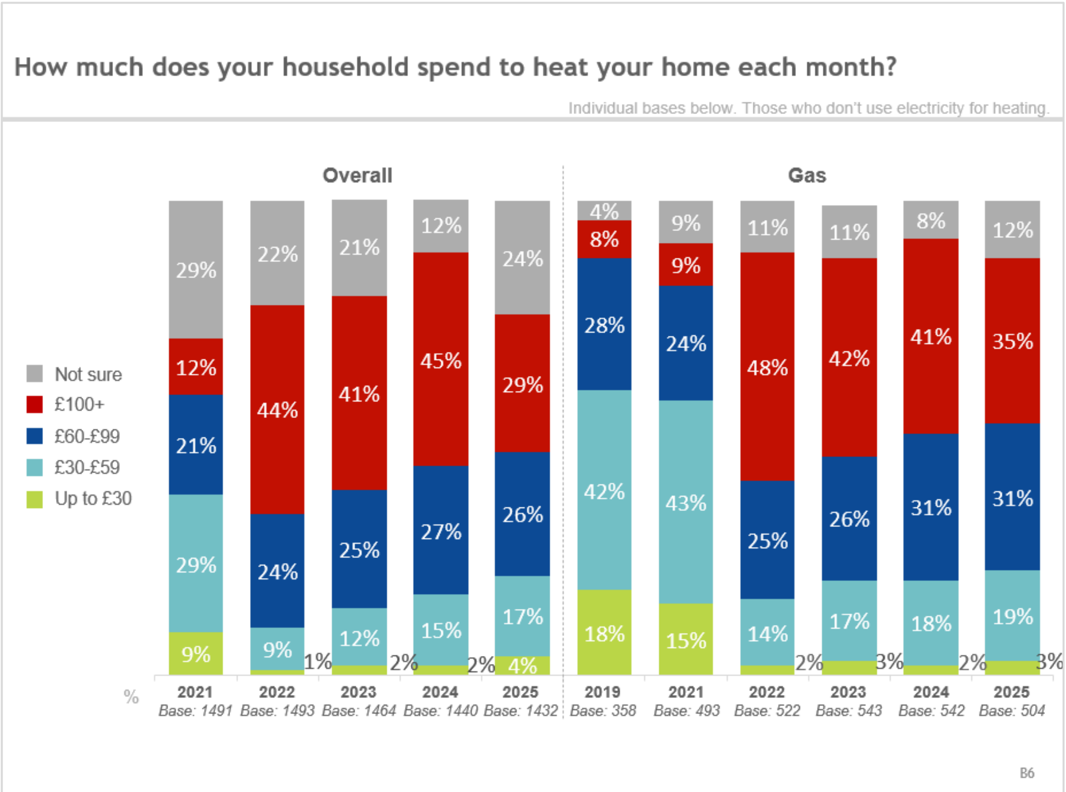
10 Credit customers or those who have a credit meter refers to respondents who do not use a prepayment meter to pay for their electricity or gas.

Monthly spend on heating

Respondents were asked how much they spend each month on heating their home (see Figure 5.8). Overall awareness of monthly heating spend has fallen from the previous Tracker, with 24% reporting they were unsure of their heating spend compared to 12% in 2024, although it is now similar to what was observed in 2022 (22%) and 2023 (21%) Trackers.

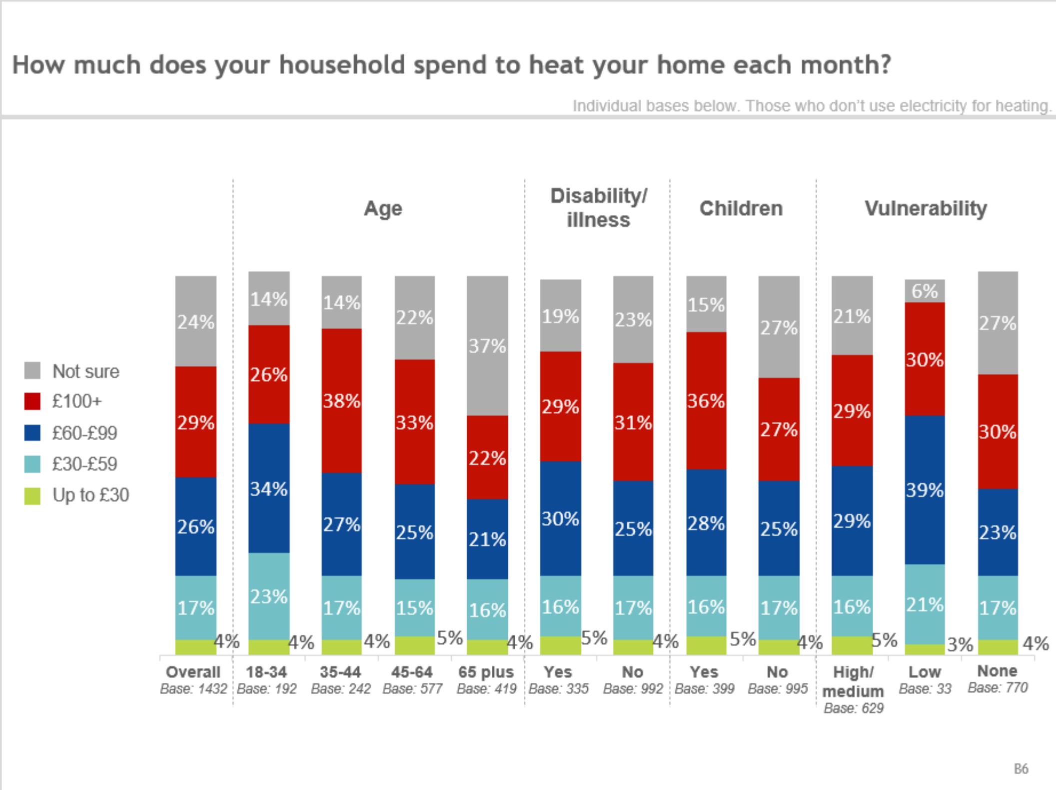
Overall, respondents were most likely to spend £100 or more (29%) per month on heating, including one third (35%) of gas customers reporting this. Despite £100 or more being the most common monthly heating spend, the proportion of domestic consumers who said they spend that much has fallen from the 2022 (44%), 2023 (41%) and 2024 (45%) Trackers.

Figure 5.8 Monthly spend on heating



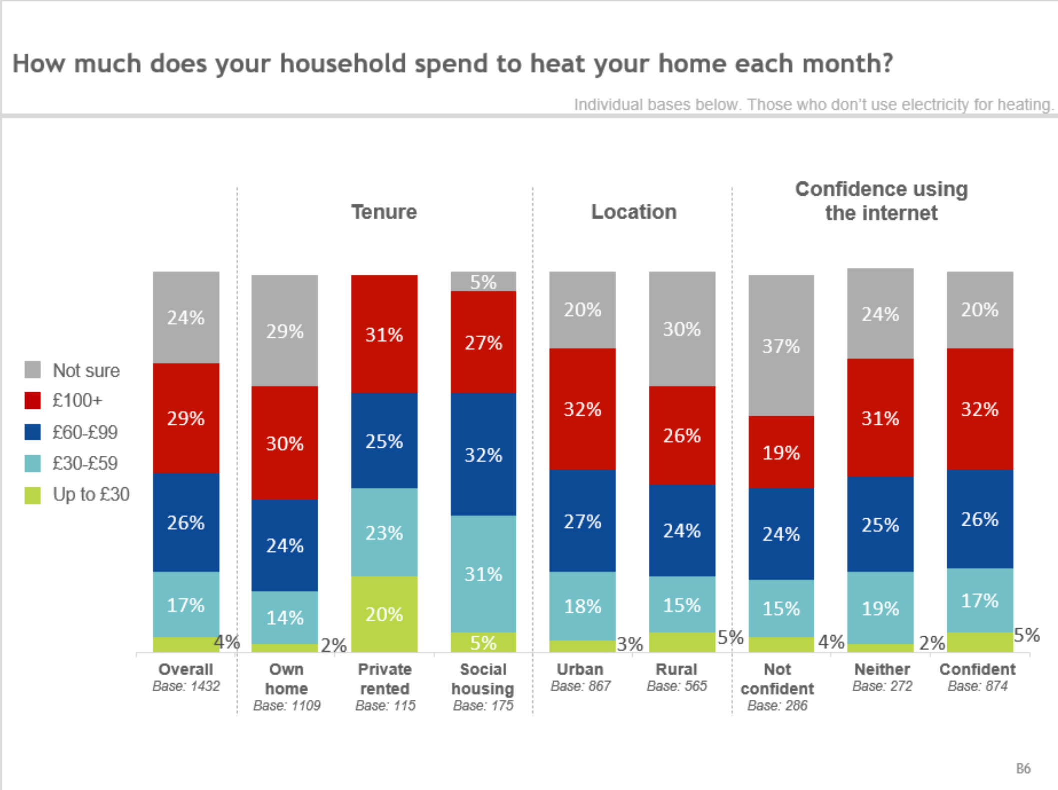
Respondents aged 65 and over (37%) were less likely to know how much they spend on heating per month than all other age groups. Respondents who have someone in their household with a disability or illness (30%) were more likely to say they spend between £60 and £99 per month on heating than those without (25%), while respondents who have children in their household (36%) were more likely than those without (27%) to report spending £100 or more per month. 27% of those not considered to be vulnerable were unaware of their monthly heating spend, compared to one fifth (21%) of those in the high or medium vulnerability group (see Figure 5.9).

Figure 5.9 Monthly spend on heating by age, disability/illness, children, and vulnerability



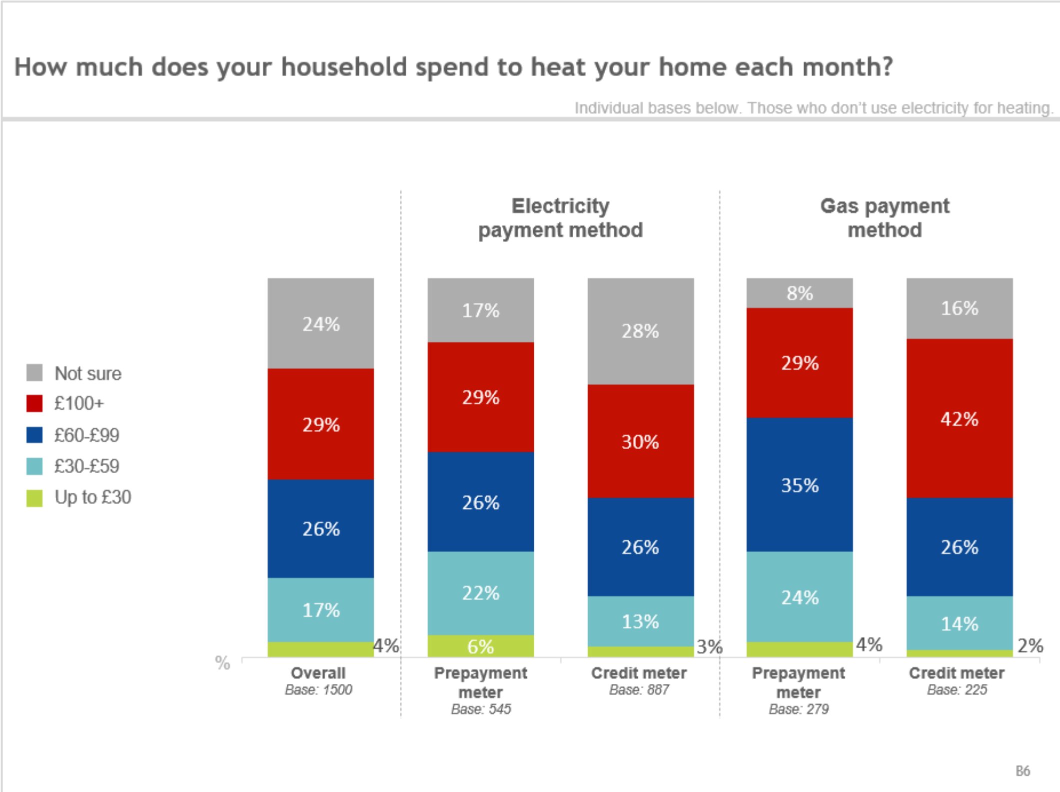
Respondents who own their home (29%) were less likely to be aware of their monthly heating spend than those living in social housing (5%) and those who privately rent (less than 1%). Those who live in urban areas (32%) were more likely to spend at least £100 per month when compared with those in rural areas (26%). 37% of respondents who were not confident internet users were not sure about their monthly heating spend, compared to 20% of those who consider themselves confident internet users (see Figure 5.10).

Figure 5.10 Monthly spend on heating by tenure, location and confidence using the internet



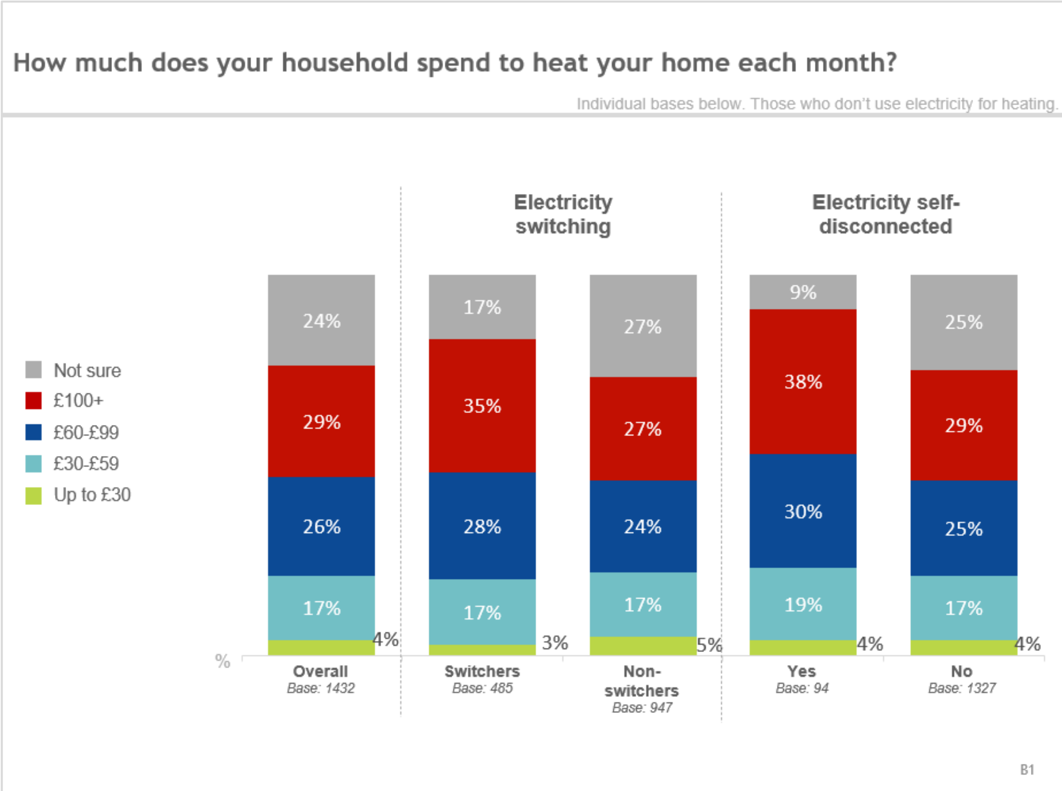
Respondents who have a credit meter for electricity (28%) and for gas (16%) were less likely to be aware of their monthly heating spend than those who have a prepayment meter (17% for electricity and 8% for gas). Gas customers on a credit meter (42%) were also more likely to report spending £100 or more per month on heating than those on a prepayment meter (29%) (see Figure 5.11).

Figure 5.11 Monthly spend on heating by payment method



Respondents who had switched their electricity supplier in the last three years (35%) were more likely to report spending £100 or more per month on heating than non-switchers (27%) but were also more likely to be aware of their monthly heating spend (17% saying 'not sure', compared to 27% of non-switchers). 38% of those who have self-disconnected from their electricity supply said they spend at least £100 per month on heating compared to 29% of those who have not self-disconnected. However, those who have not self-disconnected were less likely to be aware of their monthly heating spend (25%, compared to 9% who have self-disconnected) (see Figure 5.12).

Figure 5.12 Monthly spend on heating by electricity switching and electricity self-disconnection



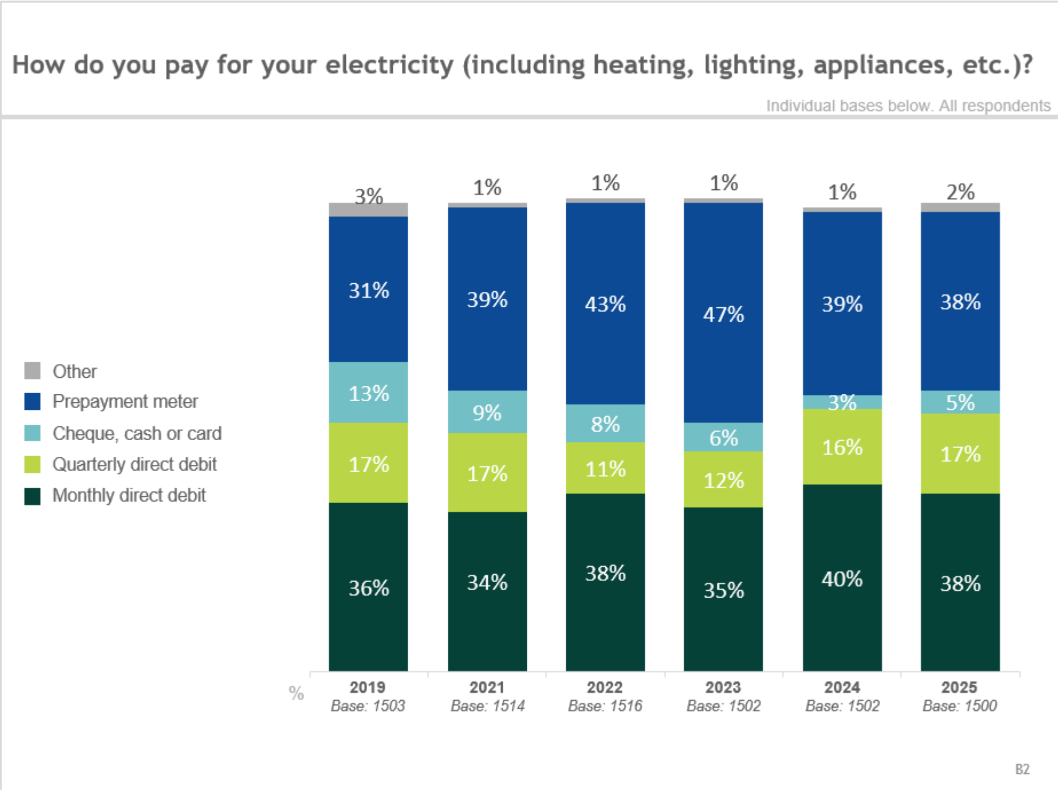
Energy payment methods and tariff types

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

Electricity

38% of respondents said they use a prepayment meter to pay for electricity. Of those on a credit meter, two in five (38%) said they are on a monthly direct debit and 17% on a quarterly direct debit. 5% reported that they pay for electricity using cheque, cash or card on receipt of their bill (see Figure 5.13).

Figure 5.13 Electricity payment method



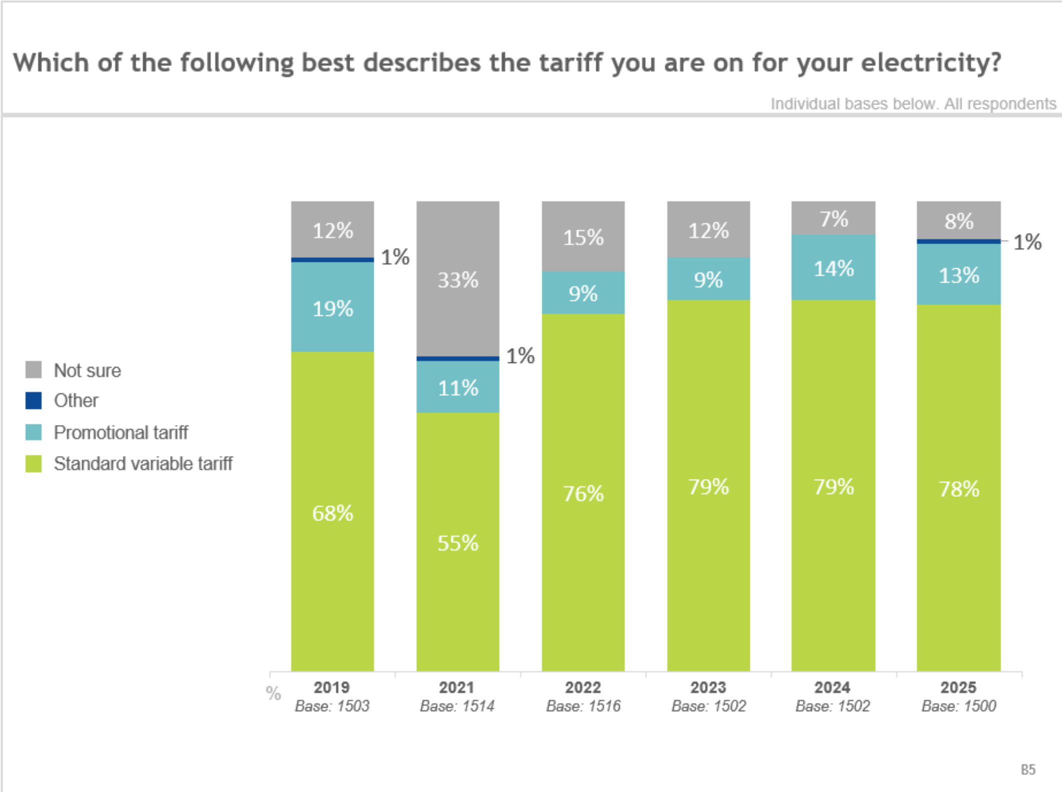
Respondents who consider themselves to be confident internet users (41%) were more likely to say they were on a prepayment meter for electricity than those who do not consider themselves to be confident users (28%). 13% of those who do not consider themselves to be confident internet users also said they pay for electricity using cheque, cash or card, compared to 3% of confident internet users (see Table 5.1)

Table 5.1 Electricity payment method by confidence using the internet

		Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment meter	Other	*Total*
Overall	All *Base: 1500*	38%	17%	5%	38%	2%	*100%*
Confidence using the internet	Not confident *Base: 306*	33%	25%	13%	28%	1%	*100%*
	Neither *Base: 288*	38%	17%	5%	39%	1%	*100%*
	Confident *Base: 906*	39%	15%	3%	41%	2%	*100%*

Almost four in five (78%) reported that they were on their supplier's standard variable tariff, similar to the Trackers from 2022 onwards. This is followed by 13% who were on a promotional tariff and 8% who were unsure what tariff they were on for electricity. Those who have switched their electricity supplier in the last three years (27%) were more likely to be on a promotional tariff than non-switchers (6%) (see Figure 5.14 and Table 5.2).

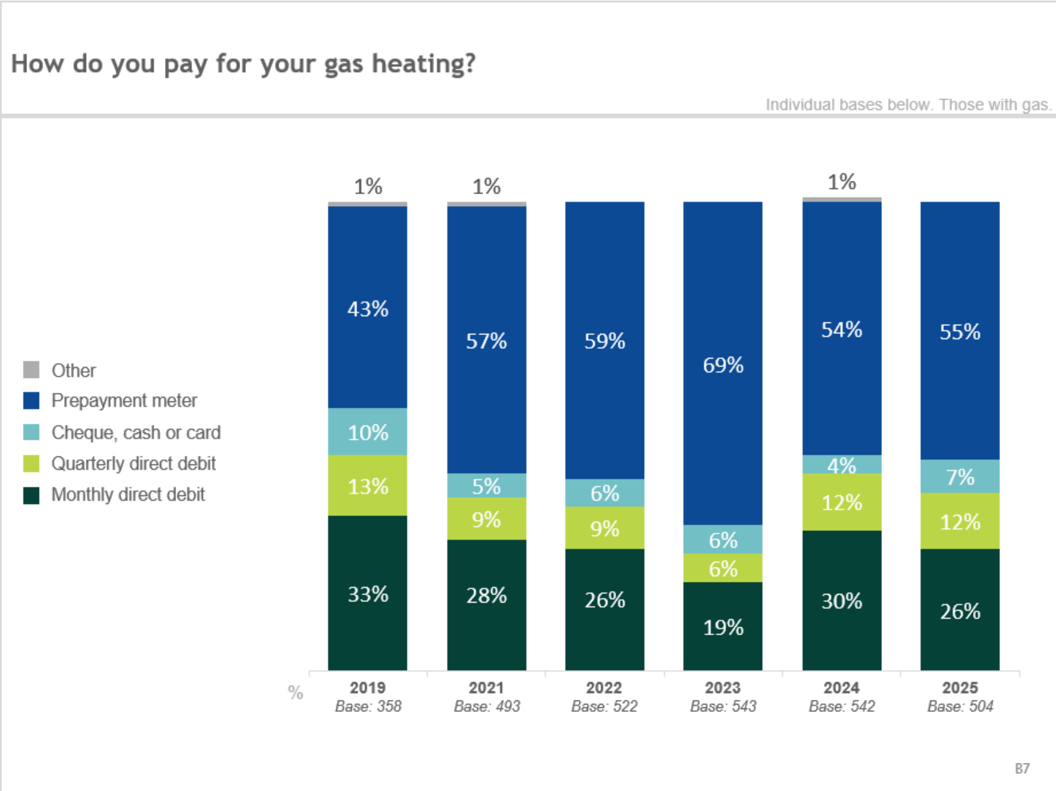
Figure 5.14 Electricity tariff



Gas

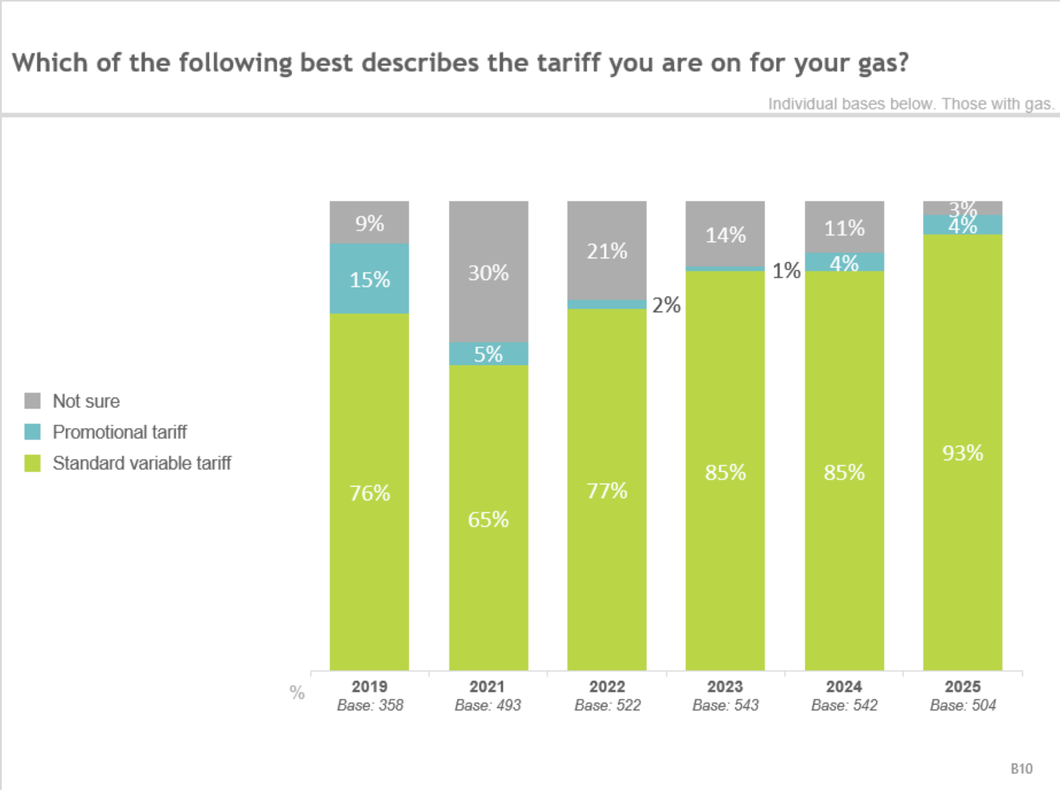
55% of respondents say they use a prepayment meter to pay for their gas. This was followed by 26% who pay by monthly direct debit, and 12% who have a quarterly direct debit. 7% pay for gas with cheque, cash or card on receipt of the bill (see figure 5.15).

Figure 5.15 Gas payment method



93% of households with gas heating reported that they were on a standard variable tariff with their supplier, up from 85% in the previous Tracker and the highest proportion observed across all previous Trackers. 4% said they were on a promotional tariff, while 3% were unsure which tariff they were on, the lowest figure across all previous Trackers (see Figure 5.16).

Figure 5.16 Gas tariff

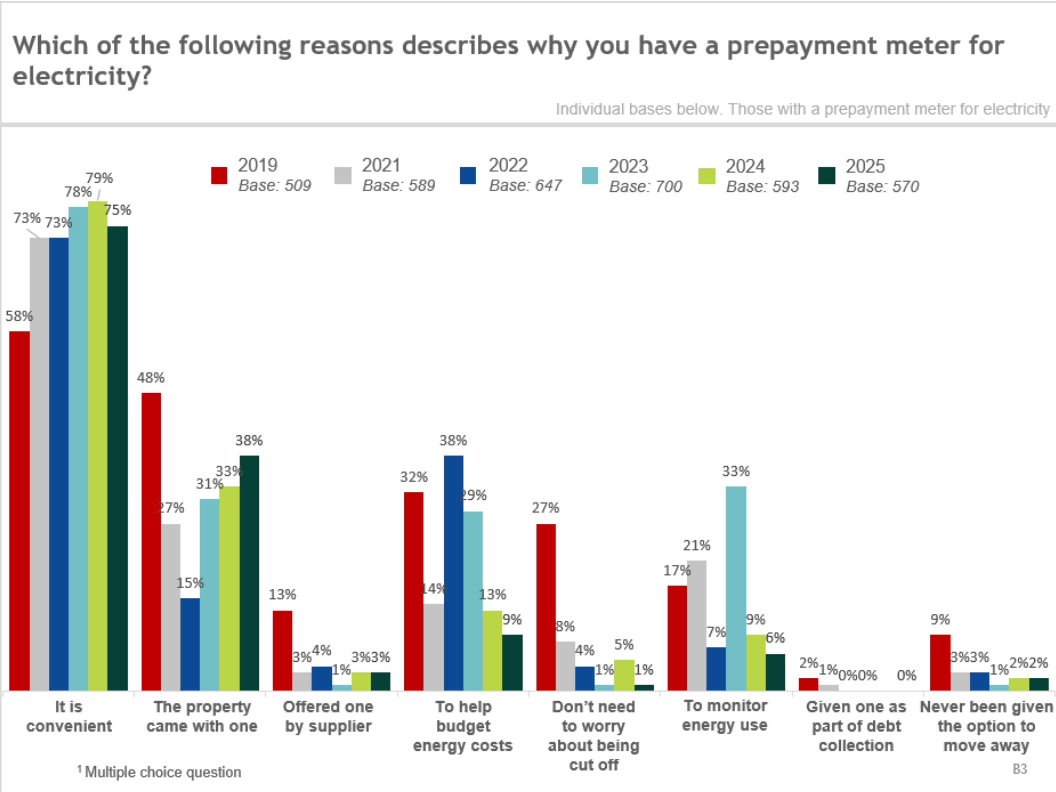


Prepayment meters

Electricity

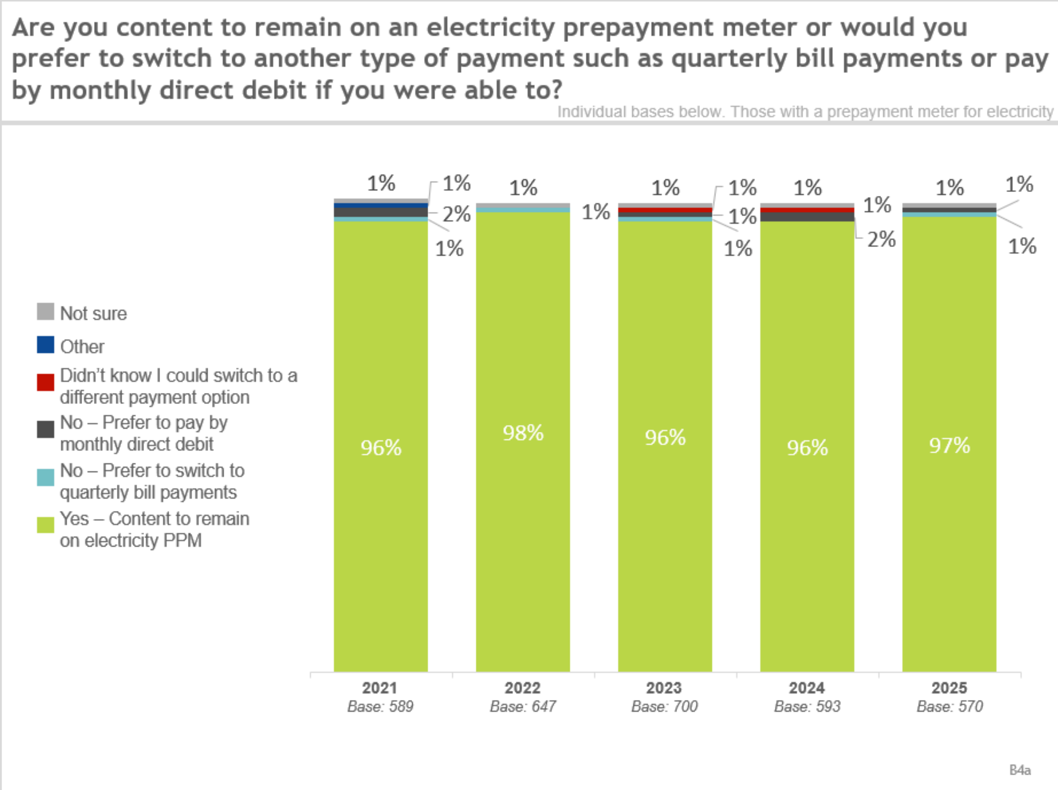
Of those respondents with a prepayment meter for electricity, three quarters (75%) reported that the reason they have one is because it is convenient for them. Two in five (38%) mentioned that the property came with a prepayment meter already installed (see Figure 5.17).

Figure 5.17 Reasons for having a prepayment meter for electricity



The vast majority (97%) of respondents with a prepayment meter stated they were content to remain with one (see figure 5.18).

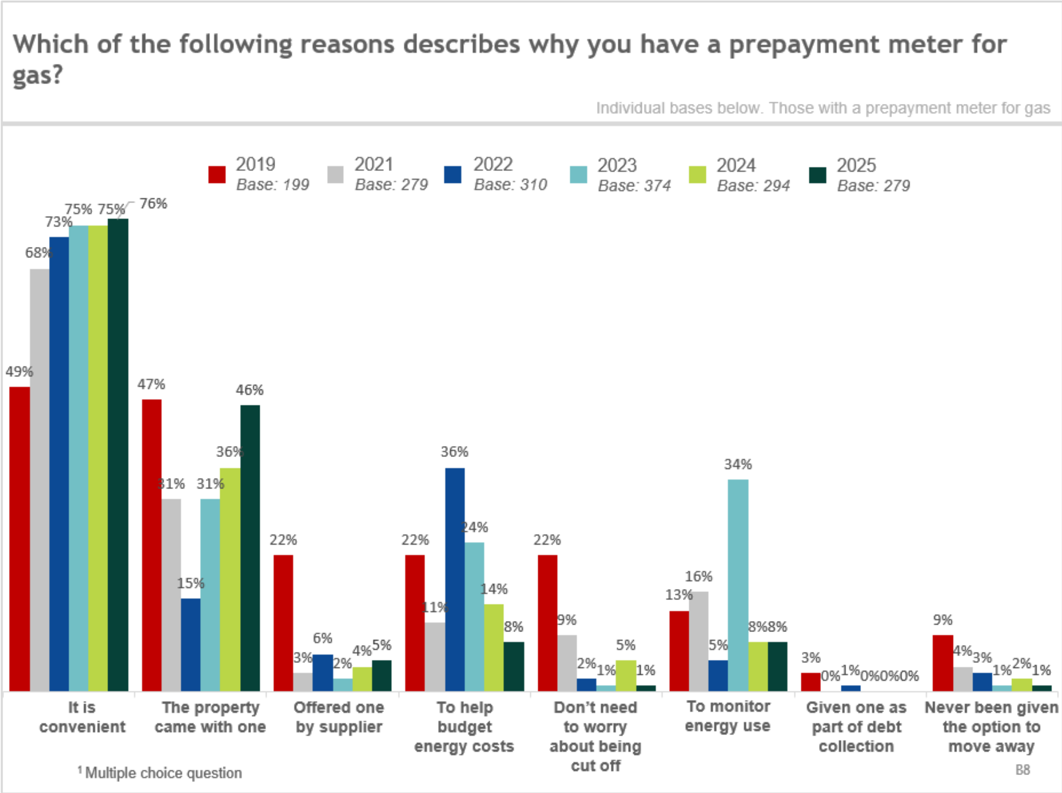
Figure 5.18 Preference for electricity payment method



Gas

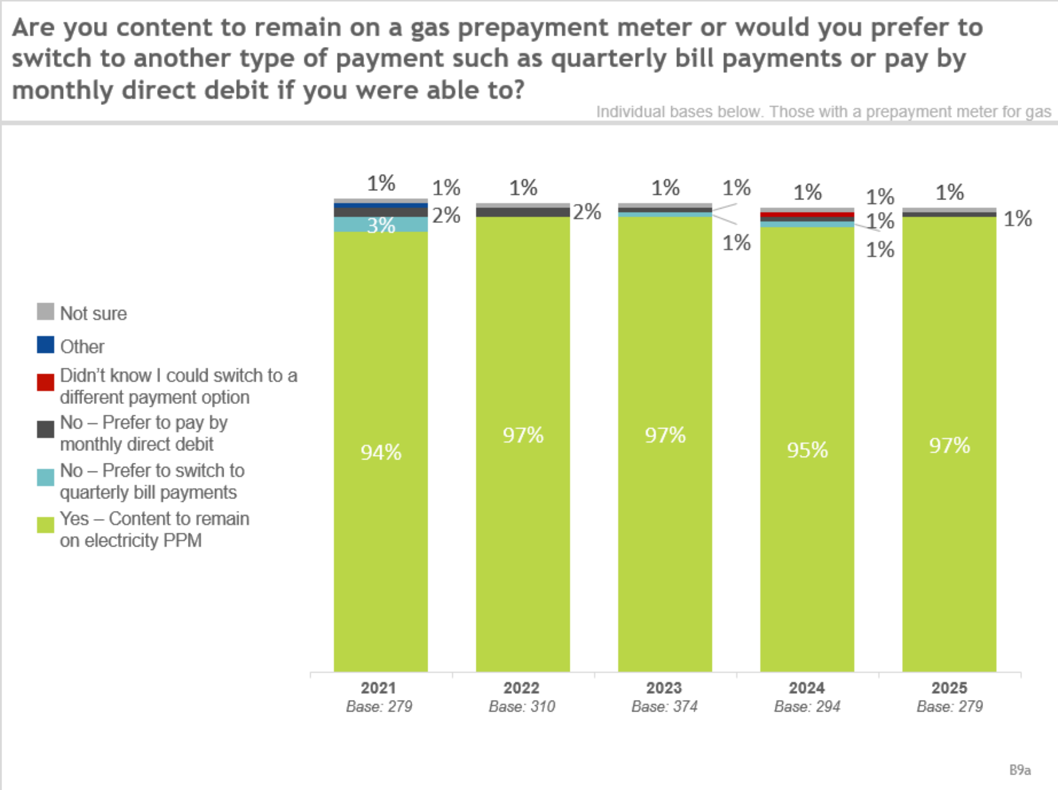
Convenience (76%) was also the most common reason for having a gas prepayment meter while 46% said that their property came with a prepayment meter (see Figure 5.19).

Figure 5.19 Reasons for having a prepayment meter for gas



The majority (97%) of respondents with a gas prepayment meter stated they were content to remain using one (see Figure 5.20).

Figure 5.20 Preference for gas payment method

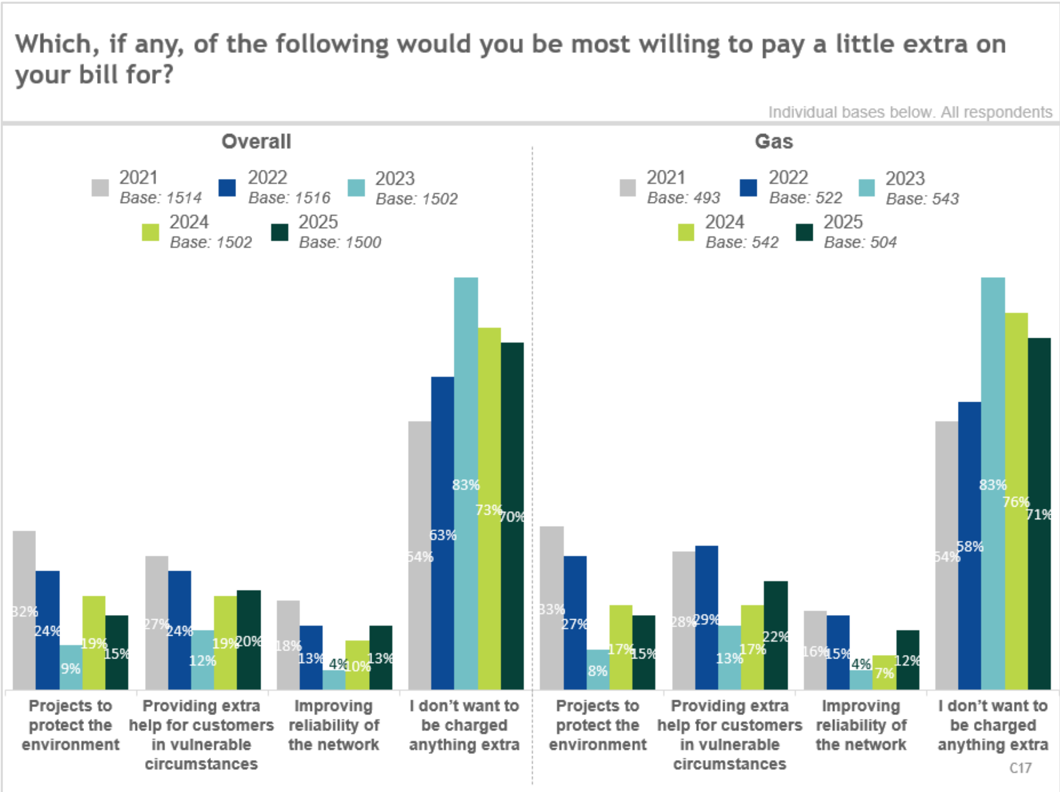


Paying extra on bill

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 5.21).

70% reported that they would not be willing to pay anything extra; while this is similar to 73% from the 2024 Tracker and lower than 83% from 2023, it is still a higher proportion than the 2022 (63%) and 2021 (54%) Trackers. 15% would be willing to pay extra for projects that protect the environment (down from 19% in 2024), while 20% would be willing to pay extra for providing extra help to vulnerable customers (similar to 19% in 2024). 13% would be willing to pay extra to improve the reliability of the network (up slightly from 10% in 2024). Unlike in 2024, there were no significant differences observed between those living in urban areas and those in rural areas.

Figure 5.21 Paying extra on energy bill



Several significant differences were observed between subgroups (see Table 5.2):

- 64% of those who have someone in their household with a disability or illness said they would not want to be charged extra for future investment, compared to 70% of those without someone in their household with a disability or illness;
- Respondents who do not have children in their household (72%) were less likely to be willing to be charged extra for future investment than those who do have children in their household (65%); and
- Those not considered to be vulnerable (73%) were less likely than those in the high and medium vulnerability group (65%) to be willing to be charged extra on their bill.

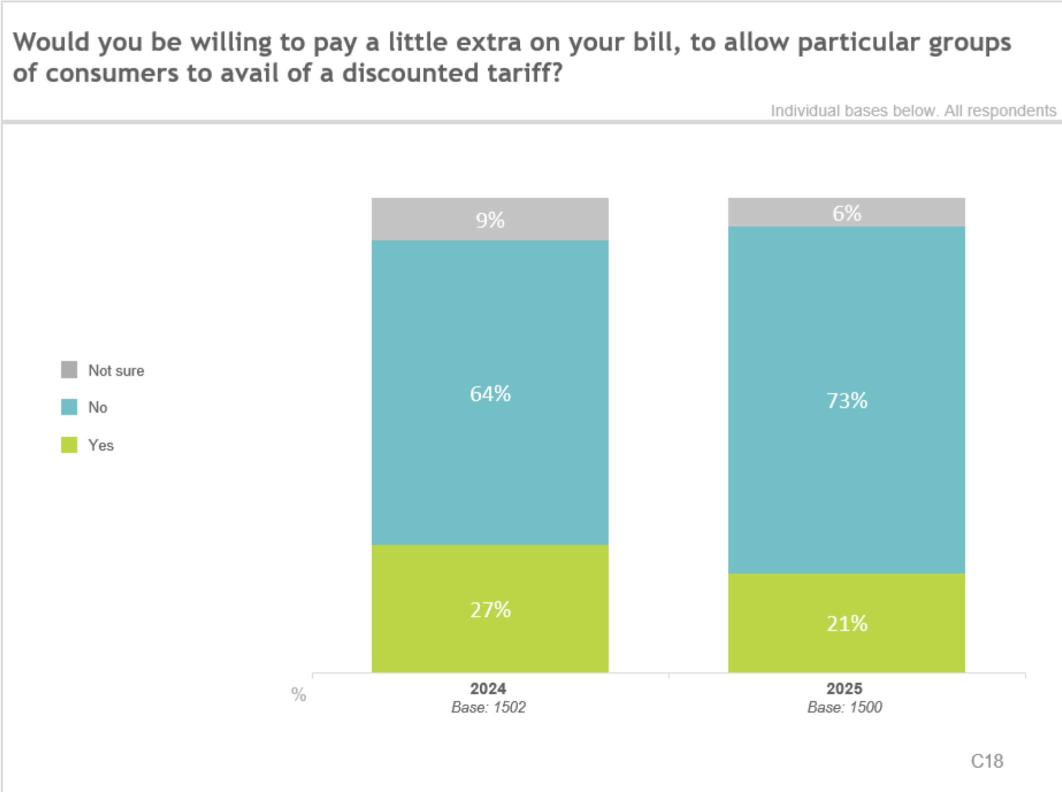
Table 5.2 Paying extra on energy bill by disability/illness, children and vulnerability

		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: 1500*	15%	20%	13%	70%
Disability/ illness	Yes *Base: 354*	16%	25%	14%	64%
	No *Base: 1031*	16%	19%	13%	70%
Children	Yes *Base: 415*	16%	24%	14%	65%
	No *Base: 1047*	15%	19%	12%	72%
Vulnerability	High/medium vulnerability *Base: 661*	15%	23%	14%	65%
	Low vulnerability *Base: 35*	17%	14%	9%	83%
	Not vulnerable *Base: 804*	15%	17%	12%	73%

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 5.22).

Three quarters (73%) of respondents would not be willing to pay extra on their bill for this purpose, increasing from 64% in 2024. One in five (21%) would be willing to pay extra, down from 27% in the previous Tracker.

Figure 5.22 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 5.3):

- Respondents who have someone with a disability or illness in their household (26%) when compared with those that do not (20%);
- Respondents who have children in their household (24%) when compared with those who do not (19%); and
- Respondents in the high or medium vulnerability group (25%) when compared with those not considered to be vulnerable (17%).

Table 5.3 Paying extra on energy bill to allow particular consumer groups to avail of a discounted tariff by disability/illness, children and vulnerability

		Yes	No	Not sure	*Total*
Overall	All *Base: 1500*	21%	73%	6%	*100%*
Disability/ illness	Yes *Base: 354*	26%	68%	6%	*100%*
	No *Base: 1031*	20%	75%	5%	*100%*
Children	Yes *Base: 415*	24%	70%	6%	*100%*
	No *Base: 1047*	19%	75%	6%	*100%*
Vulnerability	High/medium vulnerability *Base: 661*	25%	70%	5%	*100%*
	Low vulnerability *Base: 35*	17%	71%	11%	*100%*
	Not vulnerable *Base: 804*	17%	77%	6%	*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 an increase in customer engagement with written communications received from their supplier, with results now more in line with the 2022 Tracker. 54% of electricity customers reported reading their correspondence in full (compared to 42% in 2024, 50% in 2023 and 56% in 2022) while 53% of gas consumers reported reading their correspondence in full (compared to 41% in 2024, 49% in 2023 and 54% in 2022).
- Similar proportions reported receiving correspondence from their electricity supplier in the post (41%) and via email or online (40%), while gas customers were more likely to receive correspondence through the post (49%, compared to 24% through email or online).
- Of those respondents who had glanced at or read their written correspondence, there has been an increase in understanding of this correspondence.
  - 85% of electricity respondents agreed or strongly agreed that the information was clear and understandable (compared to 76% in 2024); and
  - 84% of gas consumers agreed or strongly agreed that the information was clear and understandable (compared to 73% in 2024).
- Overall levels of trust in electricity suppliers have increased from 2024:
  - 73% trusted their supplier to treat them fairly (compared to 67% in 2024); and
  - 70% trusted their supplier to give them a fair price (compared to 60% in 2024).
- There has also been an increase in levels of trust amongst gas customers since the previous Tracker:
  - 75% trusted their supplier to treat them fairly (compared to 65% in 2024); and
  - 72% trusted their supplier to give them a fair price (compared to 61% in 2024).
- There has been an increase in consumer satisfaction with overall service from suppliers:
  - 87% of domestic consumers reported being satisfied or very satisfied with their electricity supplier (compared to 80% in 2024); and
  - 86% were satisfied or very satisfied with their gas supplier (compared to 75% in 2024).
- 8% 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 (16%), switching energy contract (14%), and a payment issue (10%).

- Of those that made contact; 78% found it easy to get in touch, 86% thought they were listened to, 84% felt they were treated fairly, and 83% said that their electricity supplier was supportive.
  - This is an improvement on the previous Tracker, in which 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

Two in five (41%) of domestic consumers say they receive written correspondence from their electricity supplier in the post, while a further 40% receive it via email or online. 15% of respondents did not remember receiving any correspondence or were unsure in what form it came. Respondents who have a prepayment meter for electricity (28%) were less likely to be aware of how they receive written correspondence from their supplier than those who have a credit meter (8%). 29% of respondents who have self-disconnected from their energy supply said they weren't sure how they receive correspondence from their electricity supplier, compared to 14% who have not self-disconnected (see Figure 6.1 and Table 6.1).

Figure 6.1 Form of written correspondence from electricity supplier

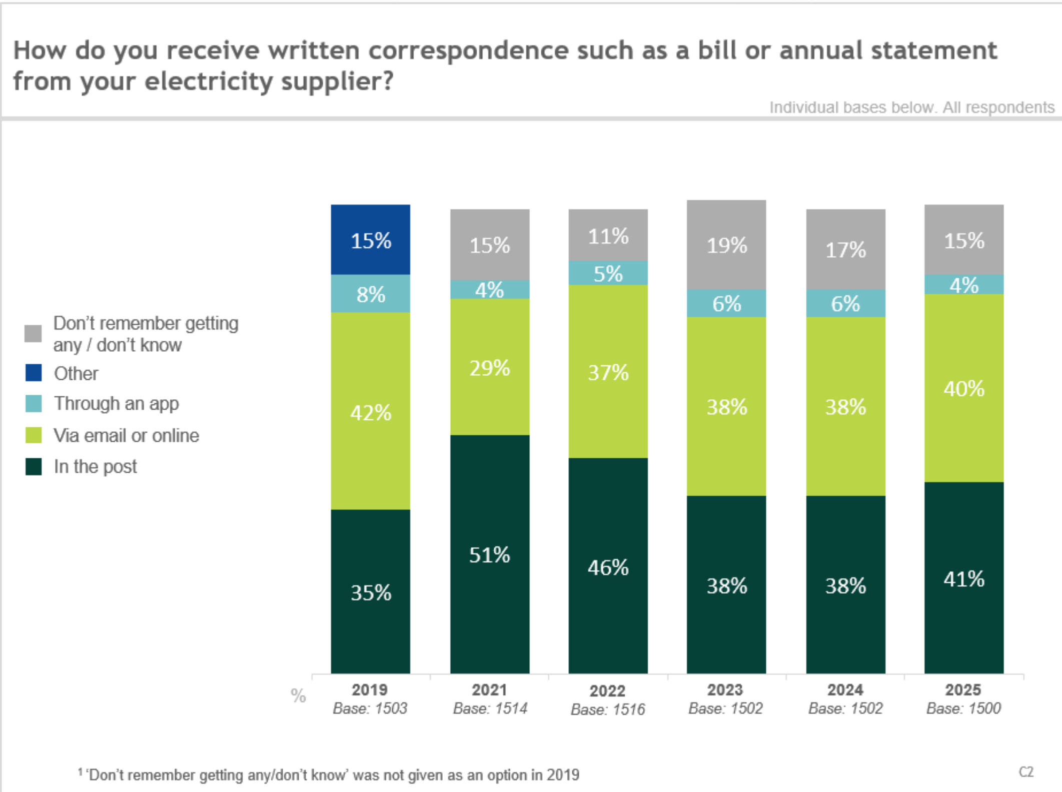


Table 6.1 Form of written correspondence from electricity supplier by payment method and self-disconnection

		In the post	Email / online	Through an app	Not sure	*Total*
Overall	All *Base: 1500*	41%	40%	4%	15%	*100%*
Electricity payment method	Prepayment meter *Base: 570*	38%	27%	7%	28%	*100%*
	Credit meter *Base: 930*	42%	47%	3%	8%	*100%*
Electricity self-disconnection	Yes *Base: 100*	27%	33%	11%	29%	*100%*
	No *Base: 1386*	41%	40%	4%	14%	*100%*

Over half (54%) of respondents confirmed that they read the last piece of written correspondence from their electricity supplier, increasing from 42% in 2024 and 50% in 2023 to be similar to 56% in the 2022 Tracker. A further one in five (21%) said they only glanced at the correspondence, while 9% did not read or did not open the correspondence.

Three in five (61%) credit customers said that they read the last piece of written correspondence they received from their supplier, compared to two in five (42%) of those with a prepayment meter for electricity. Those on a prepayment meter (29%) were also more likely to report that they had not received any correspondence when compared with those who have a credit meter (8%). Respondents aged 65 and over (60%) were more likely than all other age groups to confirm that they read the last correspondence they received (see Figure 6.2 and Table 6.2).

Figure 6.2 Approach to receiving written correspondence from electricity supplier

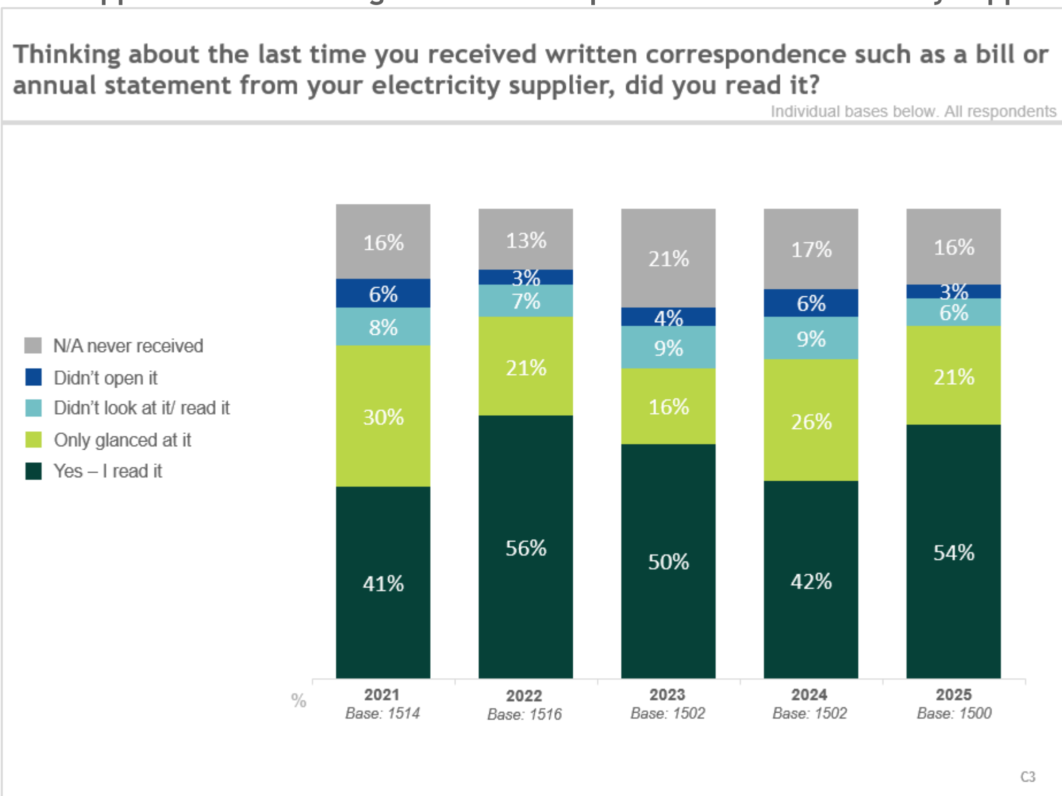
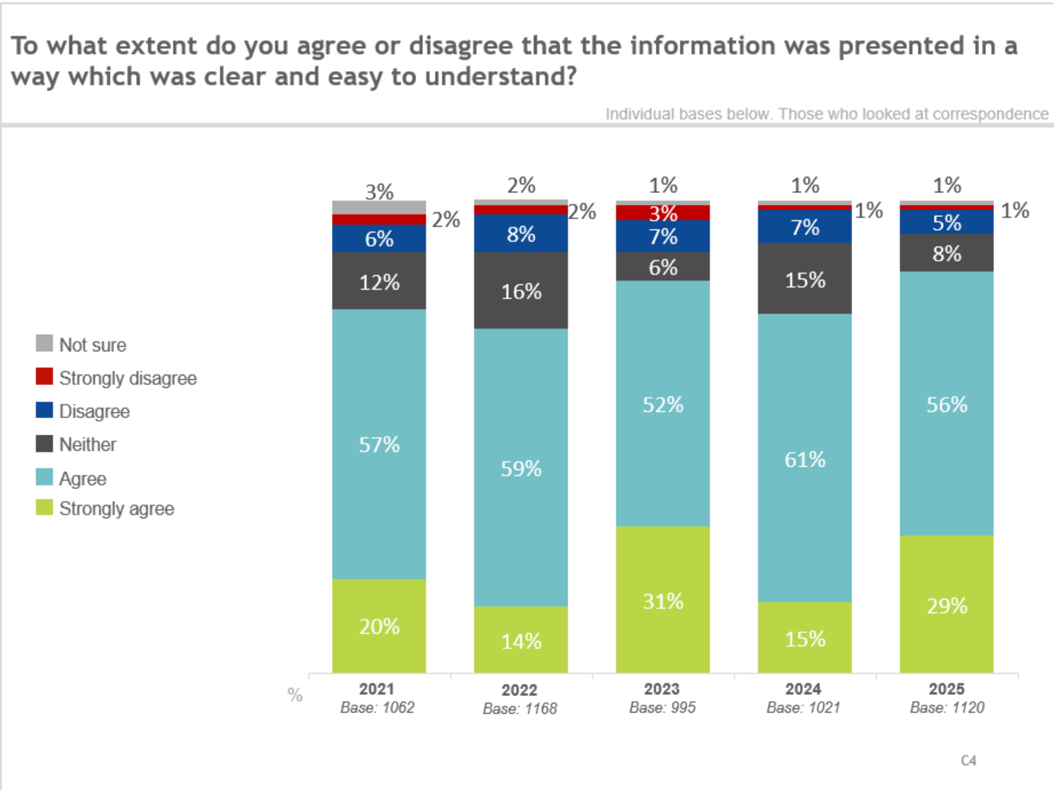


Table 6.2 Approach to receiving written correspondence from electricity supplier by age and payment method

		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: 1500*	54%	21%	6%	3%	16%	*100%*
Age	Under 35 *Base:201*	48%	18%	9%	4%	20%	*100%*
	35-44 *Base:248*	50%	22%	6%	2%	19%	*100%*
	45-64 *Base:605*	53%	21%	6%	4%	16%	*100%*
	65 plus *Base: 443*	60%	21%	4%	2%	13%	*100%*
Electricity payment method	Prepayment meter *Base: 570*	42%	18%	8%	4%	29%	*100%*
	Credit meter *Base: 930*	61%	23%	5%	3%	8%	*100%*

Of those who glanced at or read the written correspondence they received, 85% agreed or strongly agreed that the information had been presented in a way which was clear and easy to understand, compared to 6% who did not think that this was the case. This is an improvement from the previous Tracker in which (76%) agreed, with the results now more similar to those in the 2023 Tracker (83% who agreed and 10% who disagreed) (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 who do not have someone living in their household with a disability or illness (8%) were more likely to disagree when compared with those who do have someone in their household with a disability or illness (5%), although there were no significant differences between those who agreed;
- Respondents who have children in their household (79%) were less likely to agree than those without children (87%); and
- 8% of those in the high and medium vulnerability group disagreed that the information was presented in a way which was clear and easy to understand, compared to 4% of those not considered to be vulnerable. However, no significant differences were observed between those who agreed.

Table 6.3 Understanding of written correspondence from electricity supplier by disability/illness, children, and vulnerability

		Disagree	Neither	Agree	Not sure	*Total*
Overall	All *Base: 1120*	6%	8%	85%	1%	*100%*
Disability/ illness	Yes *Base: 250*	8%	6%	85%	1%	*100%*
	No *Base: 790*	5%	9%	85%	1%	*100%*
Children	Yes *Base: 294*	9%	11%	79%	1%	*100%*
	No *Base: 798*	4%	7%	87%	1%	*100%*
Vulnerability	High/medium vulnerability *Base: 490*	8%	8%	83%	1%	*100%*
	Low vulnerability *Base: 20*	5%	20%	75%	-	*100%*
	Not vulnerable *Base: 610*	4%	8%	87%	1%	*100%*

Gas

Those with gas heating were more likely to receive correspondence from their supplier through the post (49%), while one quarter (24%) obtain theirs in an email or online. 24% stated that they did not remember receiving any written correspondence from their supplier or in what form it came, similar to 23% in 2024. One third (33%) of respondents who have a gas prepayment meter stated that they were not sure whether they had received any correspondence, compared to 13% of credit customers (see Figure 6.4 and Table 6.4).

Figure 6.4 Form of written correspondence from gas supplier

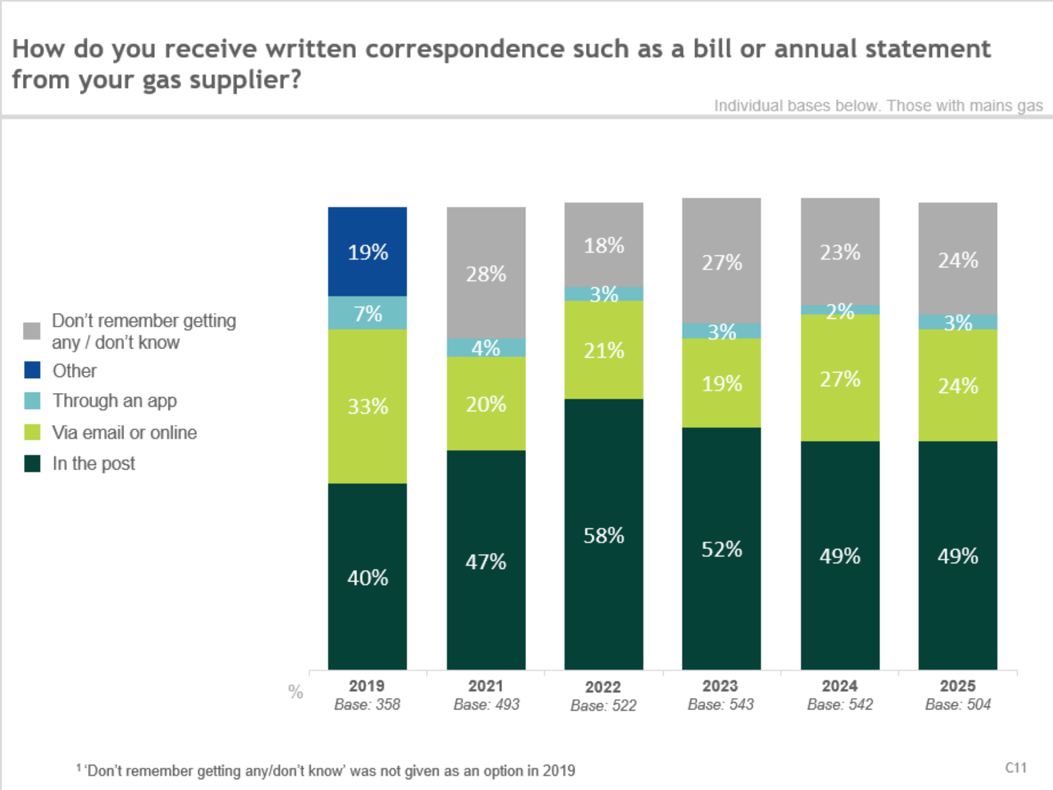


Table 6.4 Form of written correspondence from gas supplier by gas payment method

		In the post	Email / online	Through an app	Not sure	*Total*
Overall	All *Base: 504*	49%	24%	3%	24%	*100%*
Gas payment method	Prepayment meter *Base: 279*	45%	18%	4%	33%	*100%*
	Credit meter *Base: 225*	54%	32%	1%	13%	*100%*

Over half (53%) gas customers stated that they read the last written correspondence they received from their supplier, increasing from 41% in 2024 and 49% in 2023 and similar to 54% in 2022. One third (32%) of respondents who have a prepayment meter for gas said they never received any correspondence, compared to 12% of those on a credit meter. (see Figure 6.5 and Table 6.5).

Figure 6.5 Approach to receiving written correspondence from gas supplier

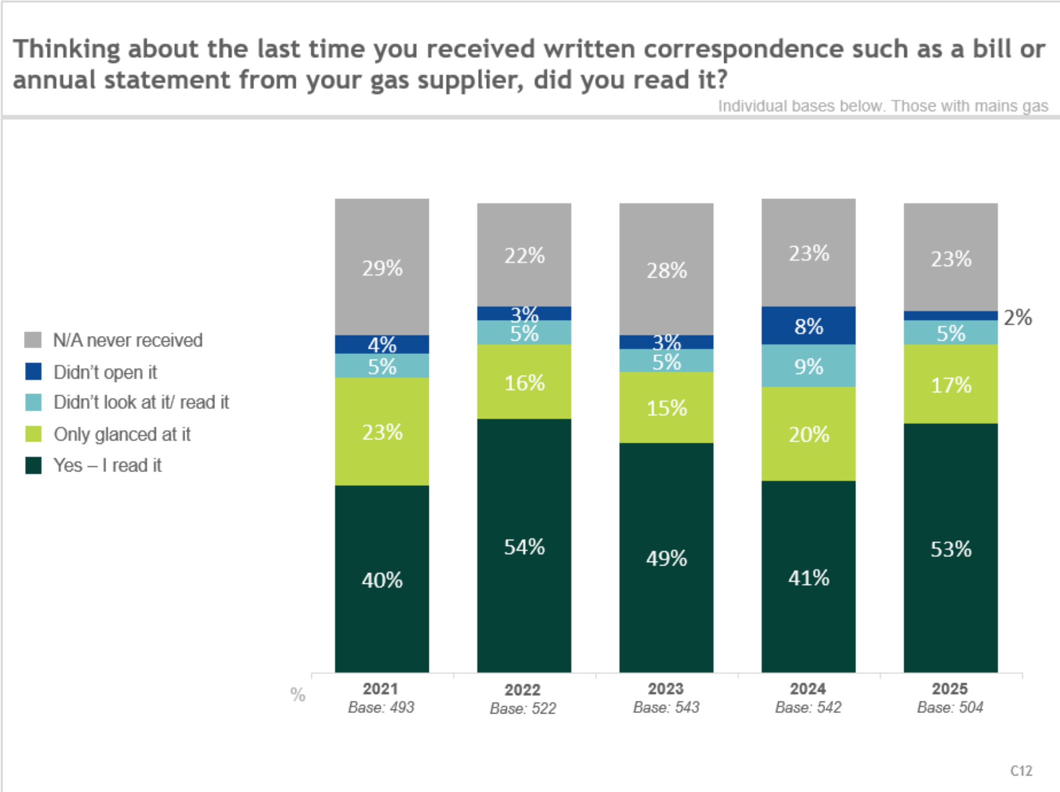
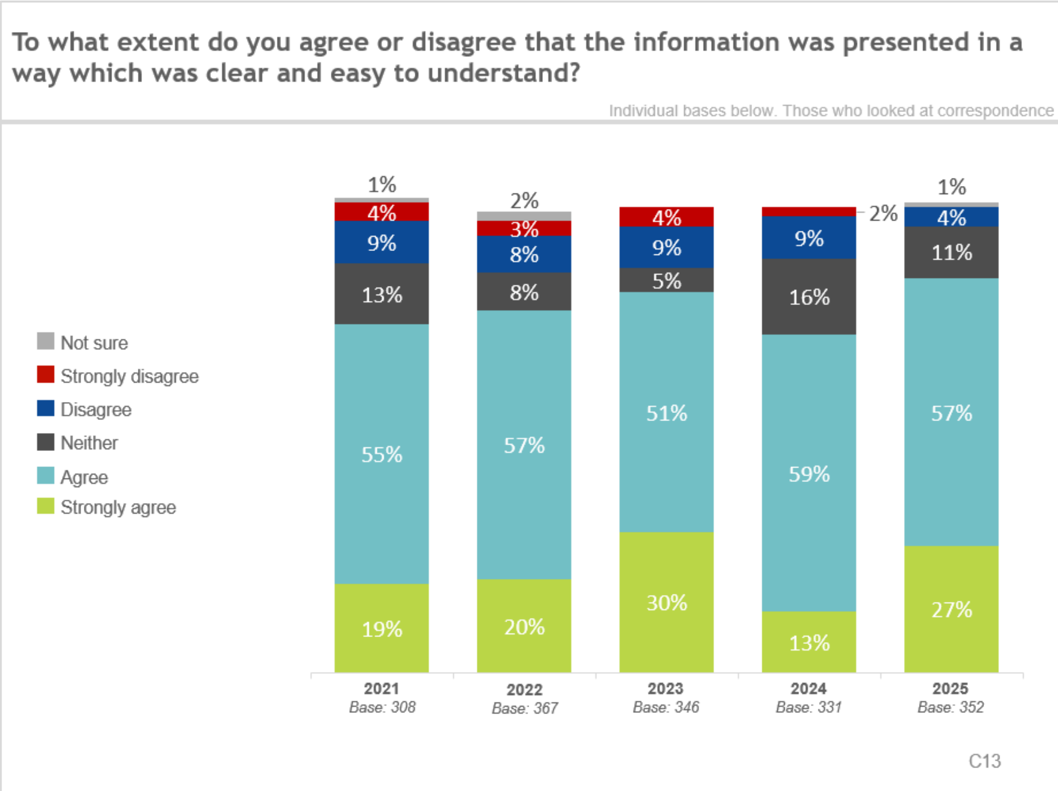


Table 6.5 Approach to receiving written correspondence from gas supplier by gas payment method

		Read it	Glanced at it	Didn't read it	Didn't open it	Never received	*Total*
Overall	All *Base: 504*	53%	17%	5%	2%	23%	*100%*
Gas payment method	Prepayment meter *Base: 279*	44%	15%	6%	2%	32%	*100%*
	Credit meter *Base: 225*	64%	18%	3%	2%	12%	*100%*

84% (up from 73% in 2024) 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. 5% disagreed or strongly disagreed with this, the lowest proportion across all previous Trackers (see Figure 6.6).

Figure 6.6 Understanding of written correspondence from gas supplier



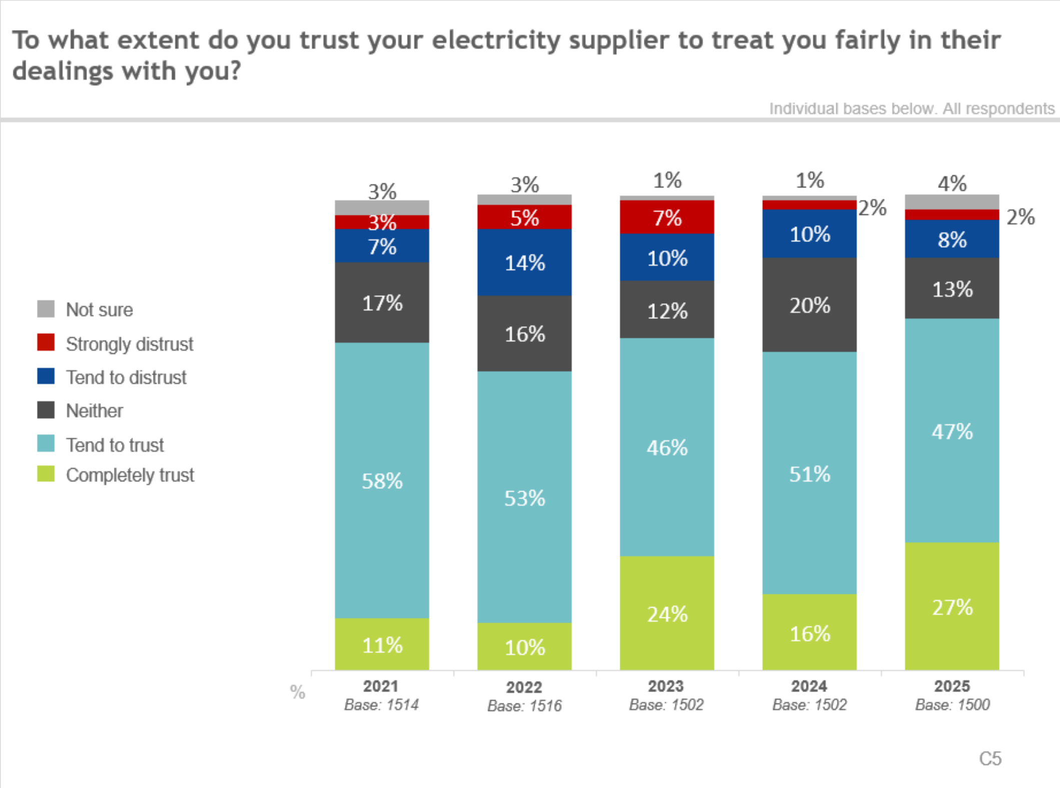
Level of trust in electricity or gas supplier

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

Electricity

73% of domestic consumers trust their electricity supplier to treat them fairly in their dealings, compared to 10% who do not trust their supplier to treat them fairly. The proportion of respondents who 'completely trust' their supplier has increased from 16% in 2024 to 27% in the current Tracker (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 6.6):

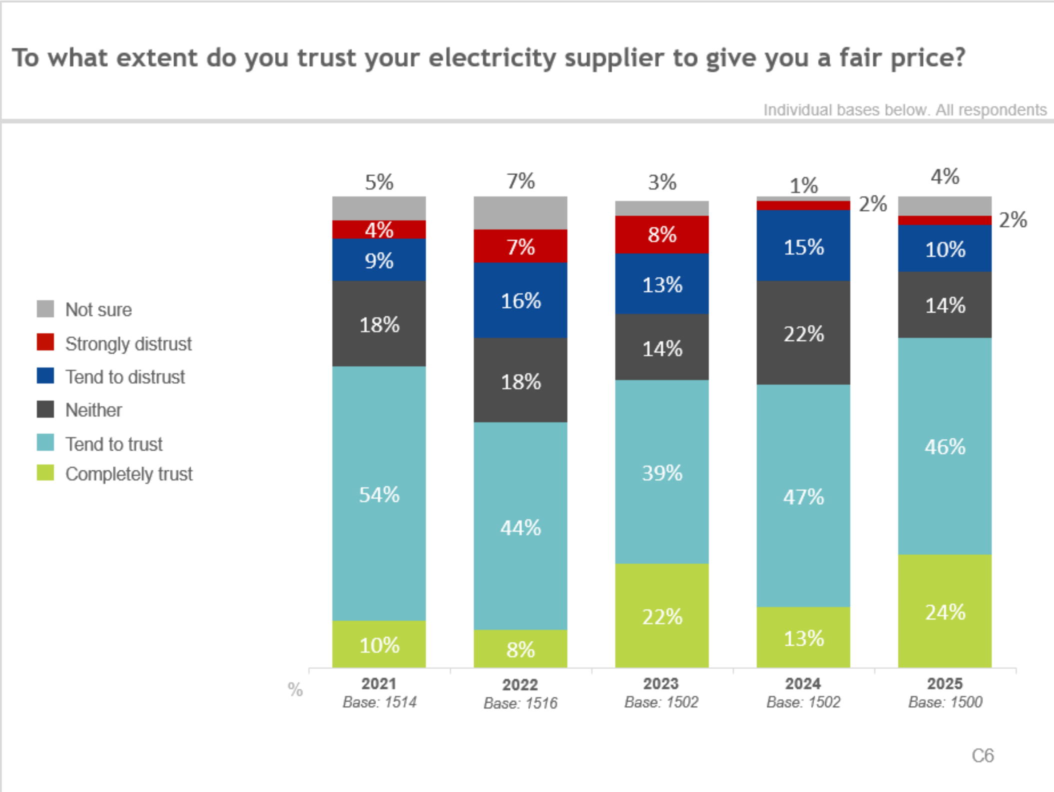
- 84% of those living in social housing said that they trust their electricity supplier to treat them fairly, compared to 71% who own their home;
- Respondents who have children in their household (68%) were less likely to say they trust their electricity supplier to treat them fairly than those without children (75%);
- Those who have self-disconnected from their electricity supply (63%) were less likely to indicate that they trust their supplier than those who have not self-disconnected (74%).

Table 6.6 Trust in electricity supplier to treat customers fairly by tenure, children and electricity self-disconnection

		Distrust	Neither	Trust	Not sure	*Total*
Overall	All *Base: 1500*	10%	13%	73%	4%	*100%*
Tenure	Own home *Base: 1158*	11%	13%	71%	4%	*100%*
	Privately rent *Base: 124*	4%	16%	76%	4%	*100%*
	Social housing *Base: 184*	5%	9%	84%	2%	*100%*
Children	Yes *Base: 415*	14%	15%	68%	3%	*100%*
	No *Base: 1047*	8%	12%	75%	4%	*100%*
Electricity self-disconnection	Yes *Base: 100*	13%	17%	63%	7%	*100%*
	No *Base: 1386*	10%	13%	74%	3%	*100%*

70% of respondents said they trust their supplier to give a fair price, including one quarter (24%) who 'completely trust' their supplier (compared to 13% in 2024). This compares to 12% who did not trust their supplier to provide a fair price (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 6.7):

- Those living in social housing (81%) were more likely to report trust in their electricity supplier to provide a fair price than those who own their home (14%);
- Respondents who have children in their household (65%) were less likely to say they trust their electricity supplier to provide a fair price than those without children (72%);
- While there were no significant differences between those indicating trust, respondents in the high and medium vulnerability group (15%) were more likely to indicate distrust in their electricity supplier to provide a fair price than those not considered to be vulnerable (11%);
- Three in five (57%) of those who had self-disconnected from their electricity supply said that they trust their supplier to provide a fair price, compared to 71% of those who have not self-disconnected.

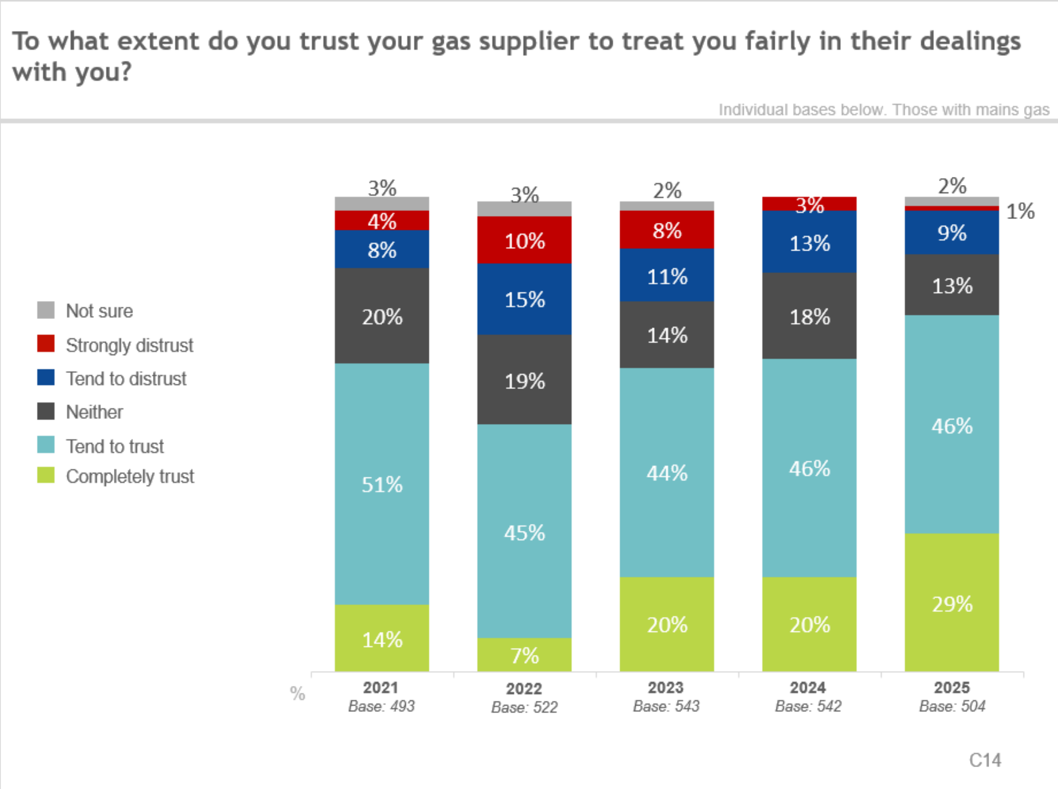
Table 6.7 Trust in electricity supplier to provide a fair price by tenure, children, vulnerability and electricity self-disconnection

		Distrust	Neither	Trust	Not sure	*Total*
Overall	All *Base: 1500*	12%	14%	70%	4%	*100%*
Tenure	Own home *Base: 1158*	14%	14%	68%	4%	*100%*
	Privately rent *Base: 124*	4%	15%	74%	6%	*100%*
	Social housing *Base: 184*	8%	9%	81%	3%	*100%*
Children	Yes *Base: 415*	15%	16%	65%	3%	*100%*
	No *Base: 1047*	11%	13%	72%	4%	*100%*
Vulnerability	High/medium vulnerability *Base: 661*	15%	13%	67%	5%	*100%*
	Low vulnerability *Base: 35*	6%	23%	71%	-	*100%*
	Not vulnerable *Base: 804*	11%	14%	72%	3%	*100%*
Electricity self-disconnection	Yes *Base: 100*	19%	16%	57%	8%	*100%*
	No *Base: 1386*	12%	14%	71%	4%	*100%*

Gas

Levels of trust in gas suppliers were similar to that for electricity suppliers. Three quarters (75%) of those with gas heating stated that they trust their supplier to treat them fairly in their dealings, compared to 10% who said they would distrust their supplier. This compares to 65% and 15% respectively from the 2024 Tracker. 72% confirmed that they trust their supplier to give a fair price, including 28% who 'completely trust' their supplier to do this, the highest proportion across all previous Trackers (see Figures 6.9 and 6.10).

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

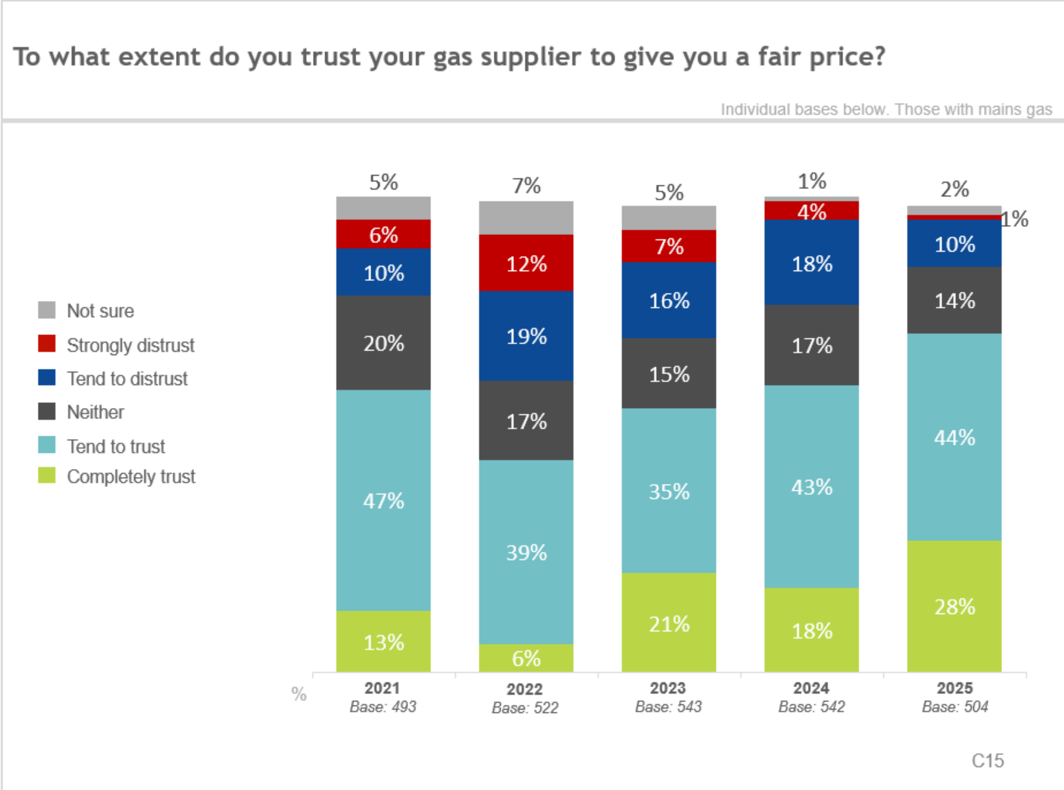


Respondents in the high and medium vulnerability group (13%) were more likely to indicate distrust in their gas supplier to treat them fairly than those not considered to be vulnerable (7%) (see Table 6.8)

Table 6.8 Trust in electricity supplier to provide a fair price by vulnerability

		Distrust	Neither	Trust	Not sure	*Total*
Overall	All *Base: 504*	10%	13%	75%	2%	*100%*
Vulnerability	High/medium vulnerability *Base: 232*	13%	9%	75%	2%	*100%*
	Low vulnerability *Base: 16*	6%	13%	81%	-	*100%*
	Not vulnerable *Base: 256*	7%	16%	74%	2%	*100%*

Figure 6.10 Trust in gas supplier to provide a fair price



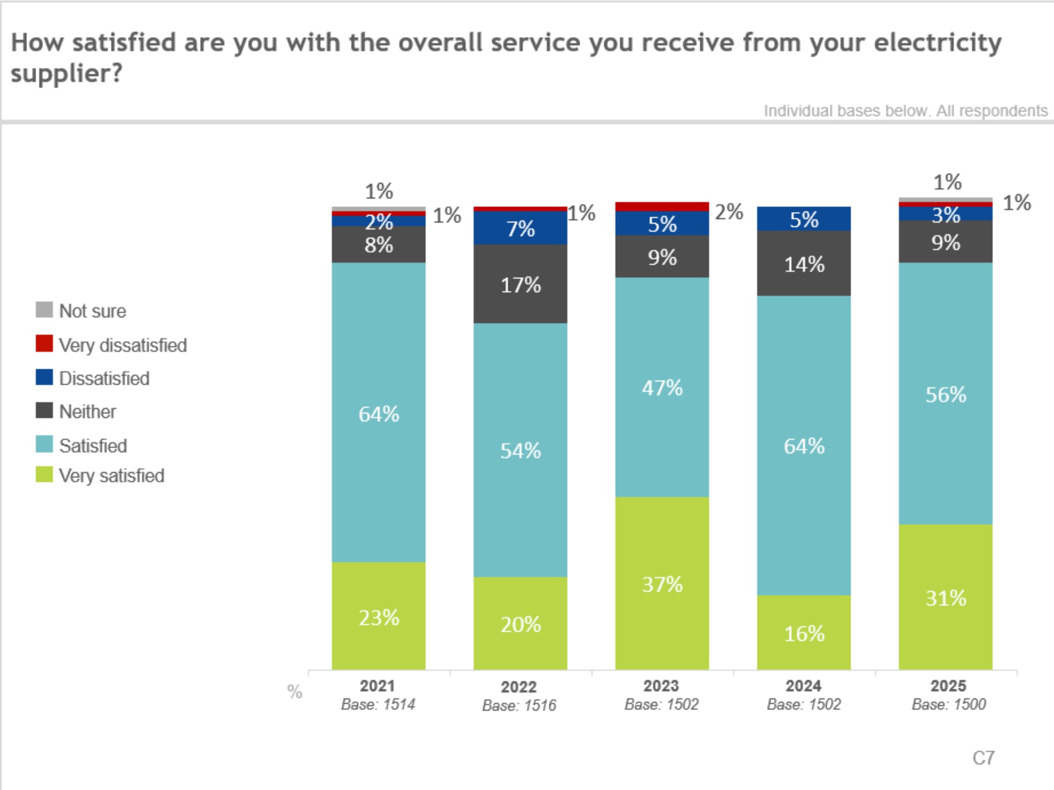
Satisfaction with overall service provided by electricity and gas suppliers

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

Electricity

87% of domestic consumers were satisfied or very satisfied with the service they receive from their electricity supplier, with 4% reporting dissatisfaction. This is compared to 80% who reported satisfaction and 6% who reported dissatisfaction in the 2024 Tracker (see Figure 6.11).

Figure 6.11 Satisfaction with overall service provided by electricity supplier



Electricity switchers (83%) were less likely than non-switchers (88%) to say that they were satisfied with the overall service provided by their electricity supplier. Respondents who had self-disconnected from their electricity supply (79%) were also less likely than those who had not self-disconnected (87%) to say they were satisfied (see Table 6.9).

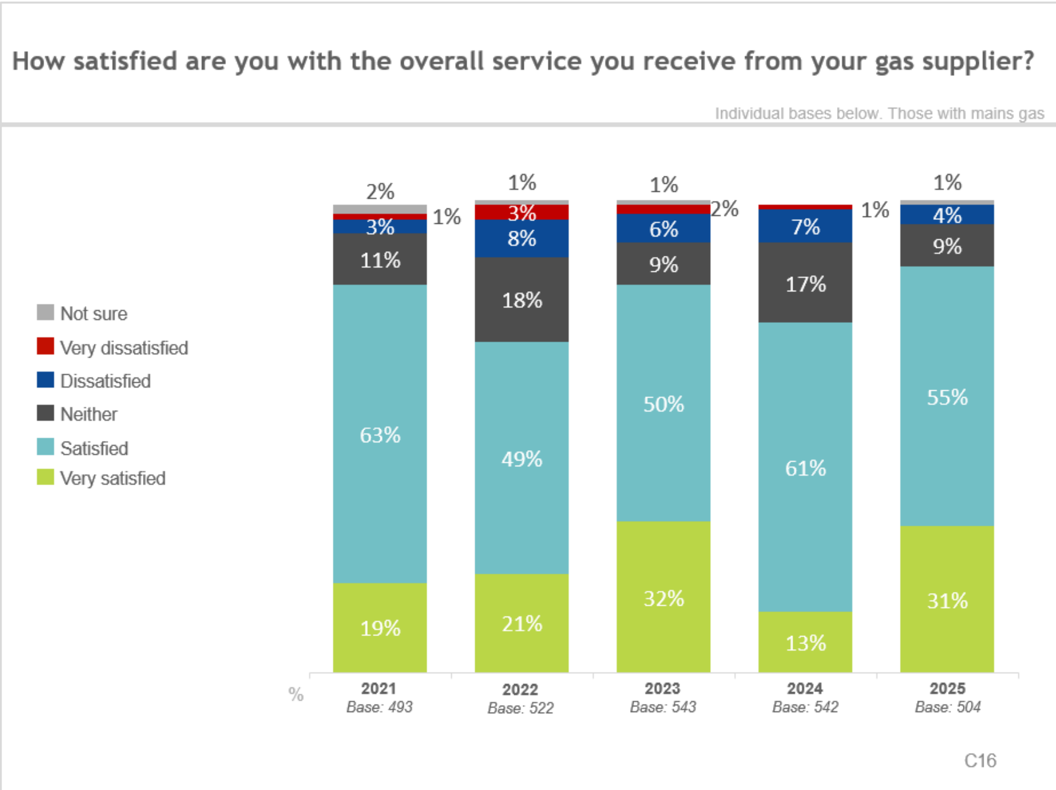
Table 6.9 Satisfaction with overall service provided by electricity supplier by electricity switching and electricity self-disconnection

		Dissatisfied	Neither	Satisfied	Not sure	*Total*
Overall	All *Base: 1500*	4%	9%	87%	1%	*100%*
Electricity switching	Switchers *Base: 500*	5%	11%	83%	1%	*100%*
	Non-switchers *Base: 1000*	4%	7%	88%	1%	*100%*
Electricity self-disconnection	Yes *Base: 100*	3%	18%	79%	-	*100%*
	No *Base: 1386*	4%	8%	87%	1%	*100%*

Gas

Overall, gas consumers were also satisfied with the service they receive from their supplier, with 86% saying this, compared to 4% who were dissatisfied. This compares with 75% who were satisfied and 8% who were dissatisfied in the 2024 Tracker (see Figure 6.12).

Figure 6.12 Satisfaction with overall service provided by gas supplier



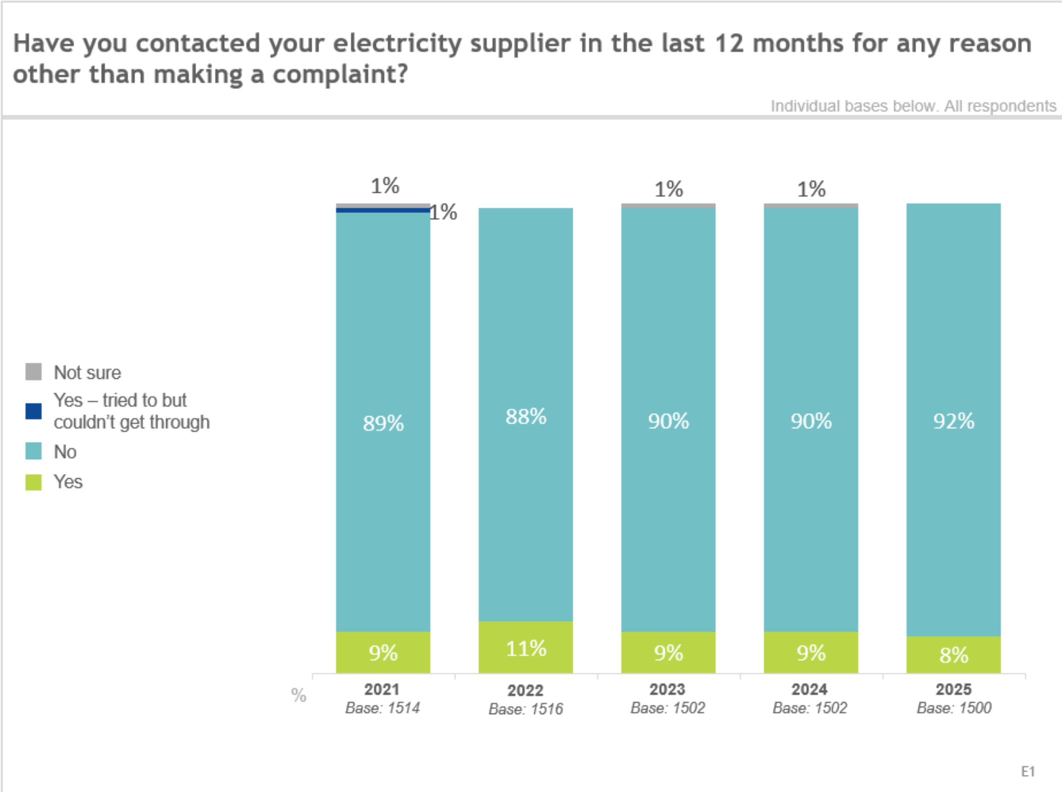
Contact with supplier

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

Electricity

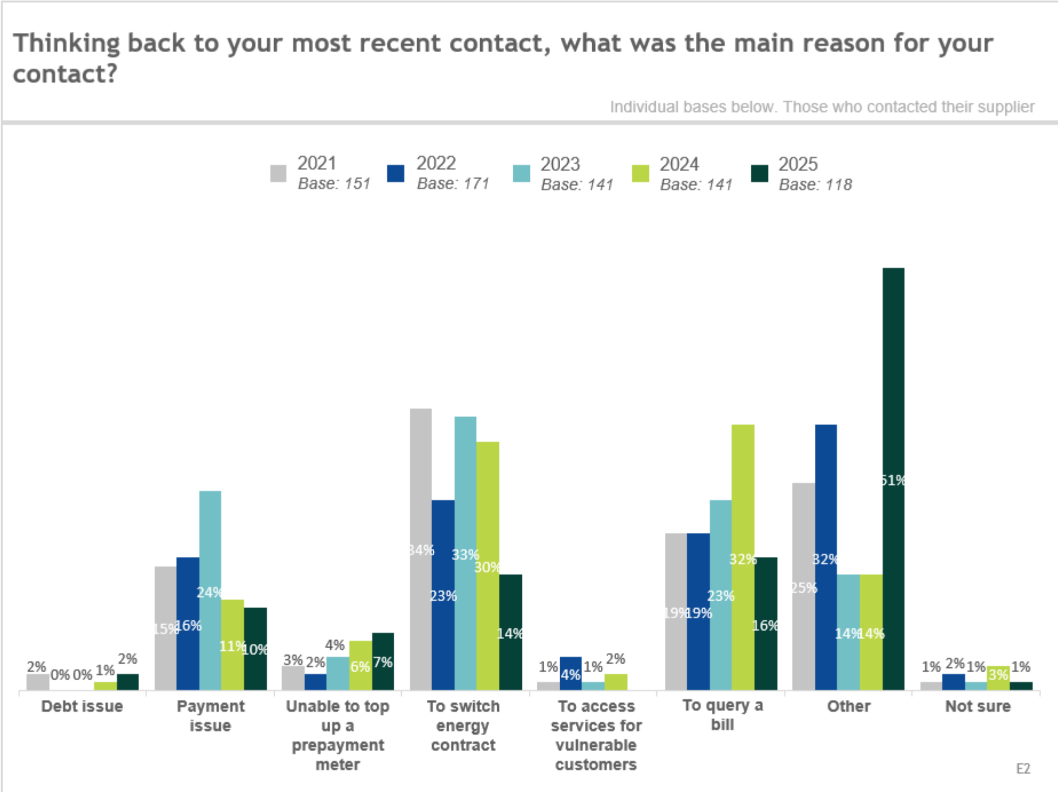
8% of respondents had contacted their electricity supplier in the last 12 months (see Figure 6.13).

Figure 6.13 Contact with electricity supplier in the last 12 months



16% of those who had made contact did so to query a bill, down from 32% in 2024. 14% made contact to switch their energy contract, decreasing from 30% in 2024. Over half (51%) made contact for other reasons, with the majority of these being in relation to power outages (see Figure 6.14).

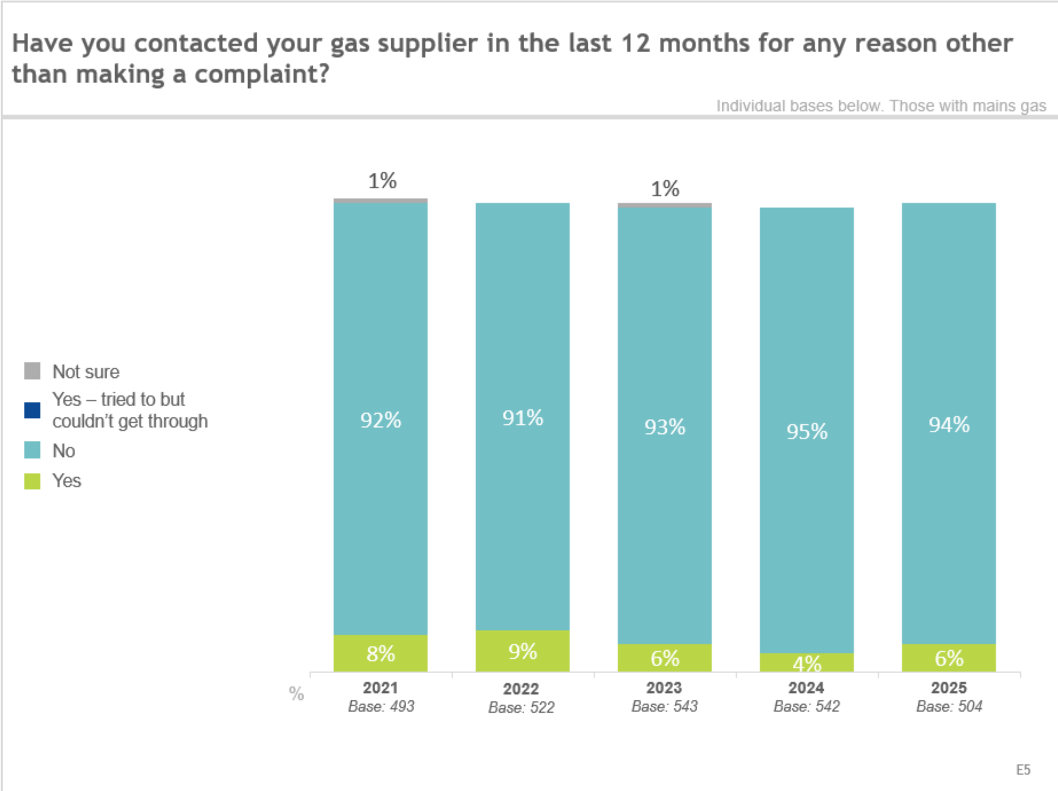
Figure 6.14 Reasons for contacting electricity supplier



Gas

6% 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



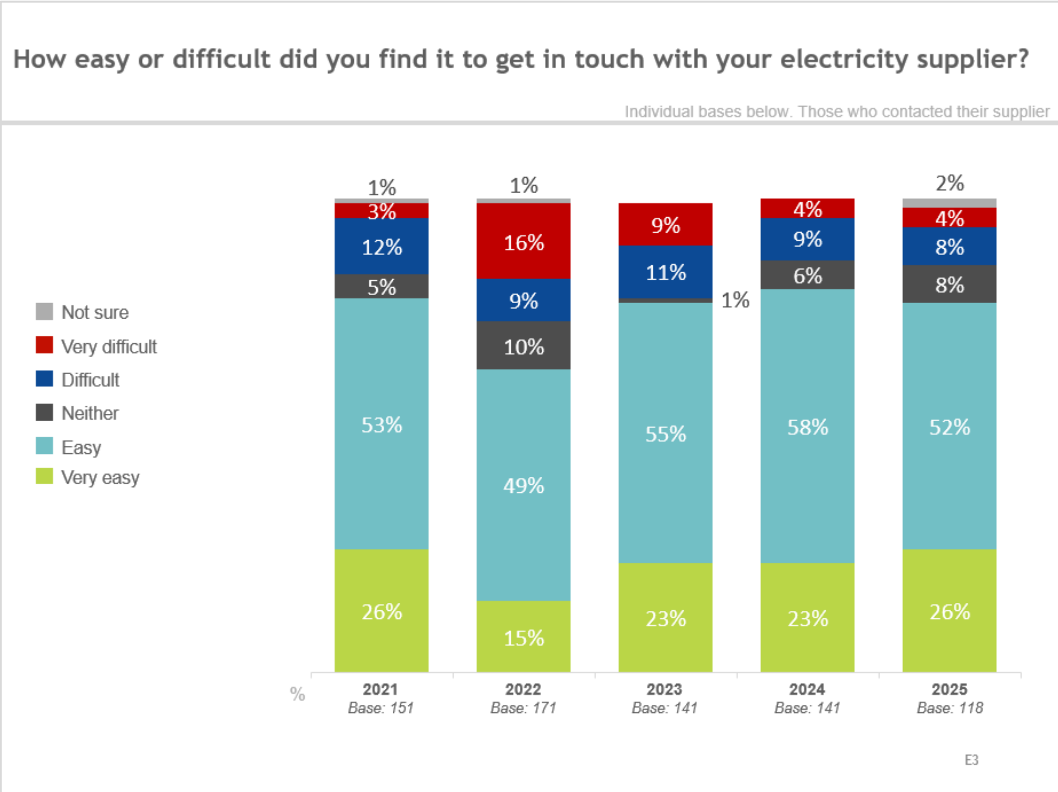
Ease of contacting supplier

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 (78%, *n=92*) found it 'easy' or 'very easy', with 13% (*n=15*) finding it 'difficult' or 'very difficult' (see Figure 6.16).

Figure 6.16 Ease of contacting electricity supplier



Gas

Of the 30 respondents who contacted their gas supplier, 26 thought it was 'easy' or 'very easy' to make contact, while 2 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

86% of respondents reported that their electricity supplier listened to and understood their issue when they made contact, with 8% disagreeing that this was the case. 83% thought their electricity supplier was supportive, compared to 9% who disagreed with this. 84% agreed that they were treated fairly and 9% disagreed (see Figures 6.17 to 6.19).

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

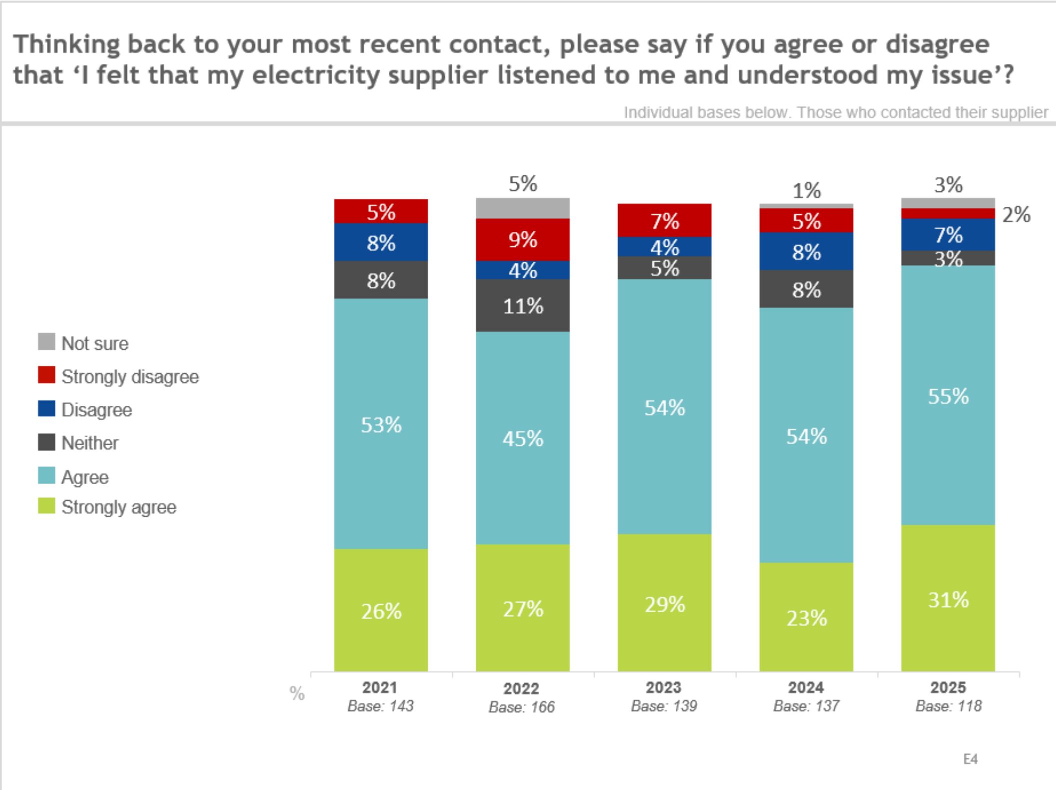


Figure 6.18 Experience of interacting with electricity supplier - my electricity supplier was supportive

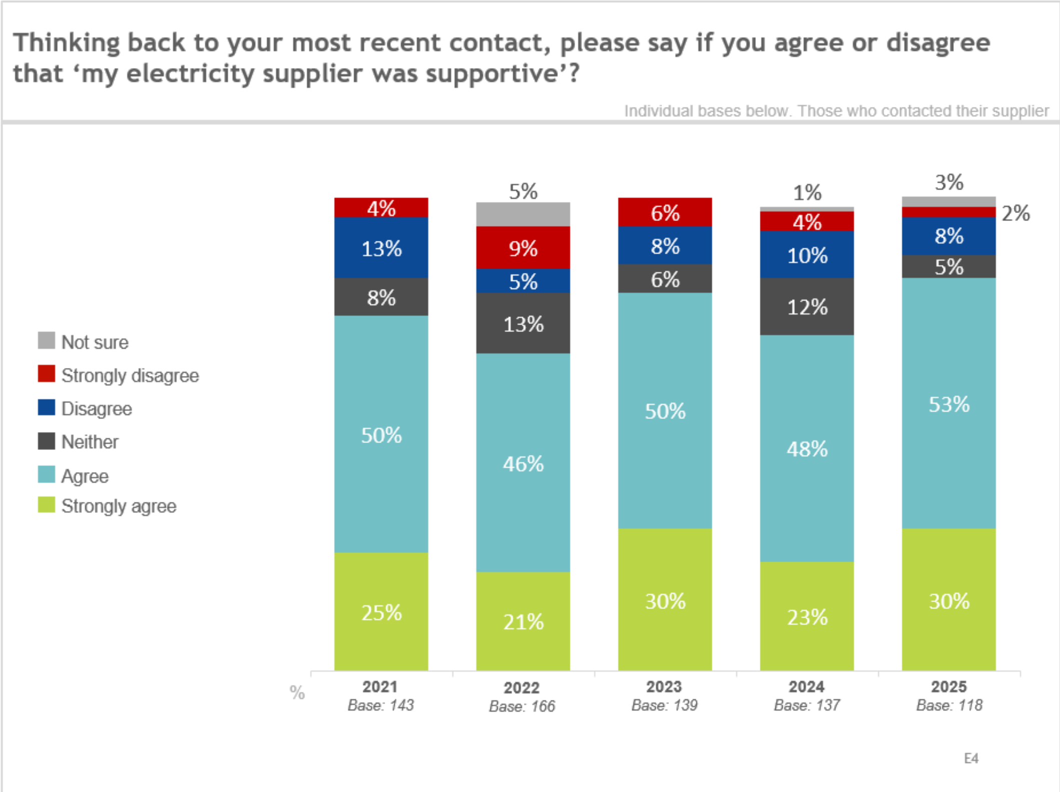
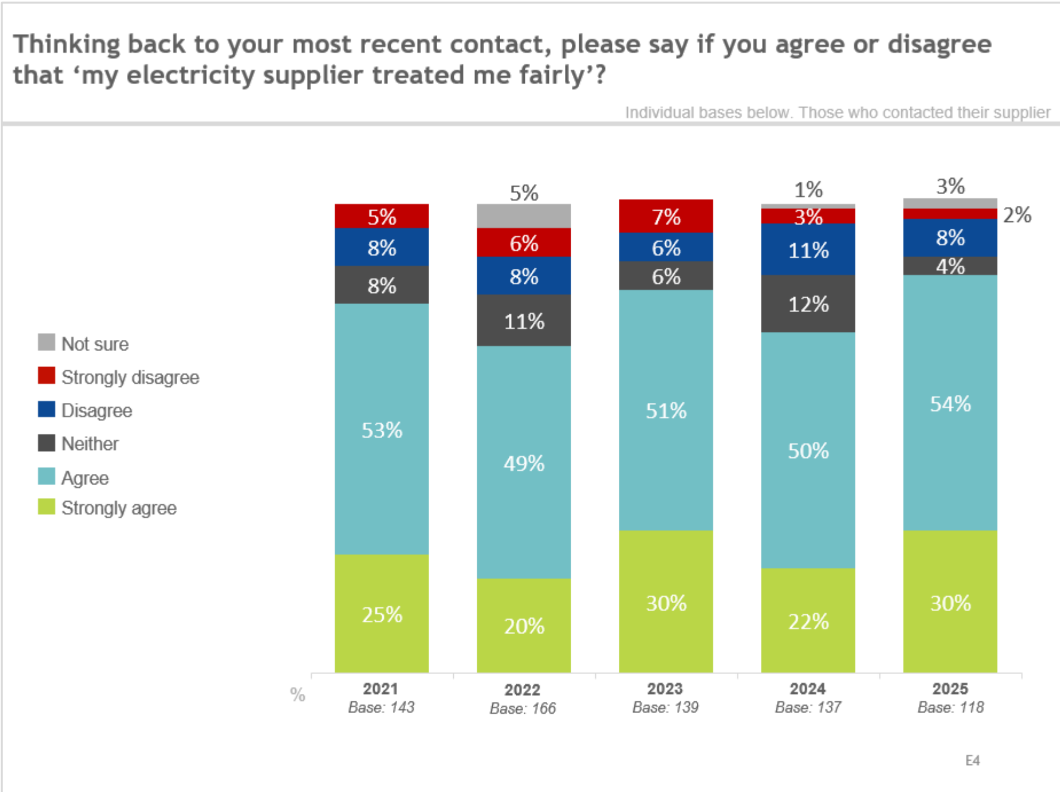


Figure 6.19 Experience of interacting with electricity supplier - my electricity supplier treated me fairly



Gas

25 of the 30 respondents who contacted their gas supplier reported they were listened to and understood when they made contact. 24 agreed that their supplier was supportive, and 24 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.

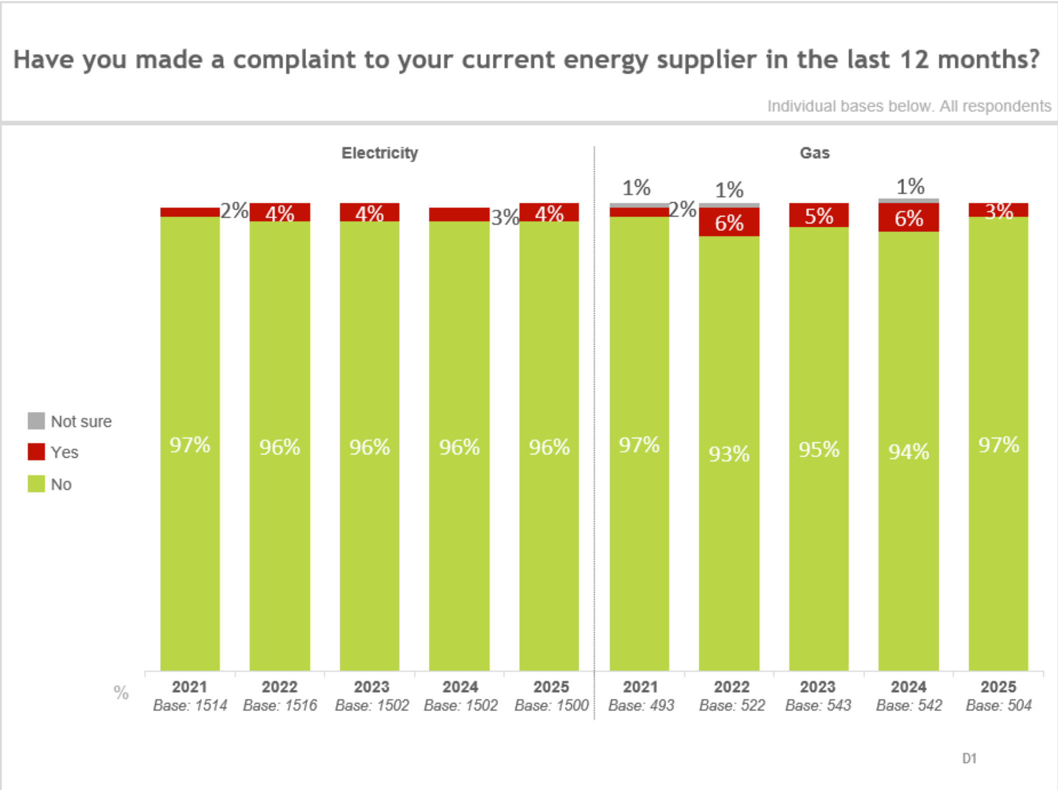
Key findings

- 4% of electricity and 3% of gas respondents had made a complaint to their electricity or gas supplier in the past year.
- 2% of respondents who haven't complained to their electricity in the past year stated that they had wanted to make a complaint but either weren't sure how, never got round to it, or did not think it would make a difference. 1% of respondents felt the same way about their gas supplier.

Incidence of making a complaint

4% of electricity and 3% of gas customers reported that they had made a complaint to their electricity supplier in the last 12 months (see Figure 7.1 and Table 7.1).

Figure 7.1 Incidence of making a complaint to energy supplier



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 61 electricity customers who made a complaint to their supplier, 43 found it easy to make the complaint, while 15 respondents found it difficult.

Gas

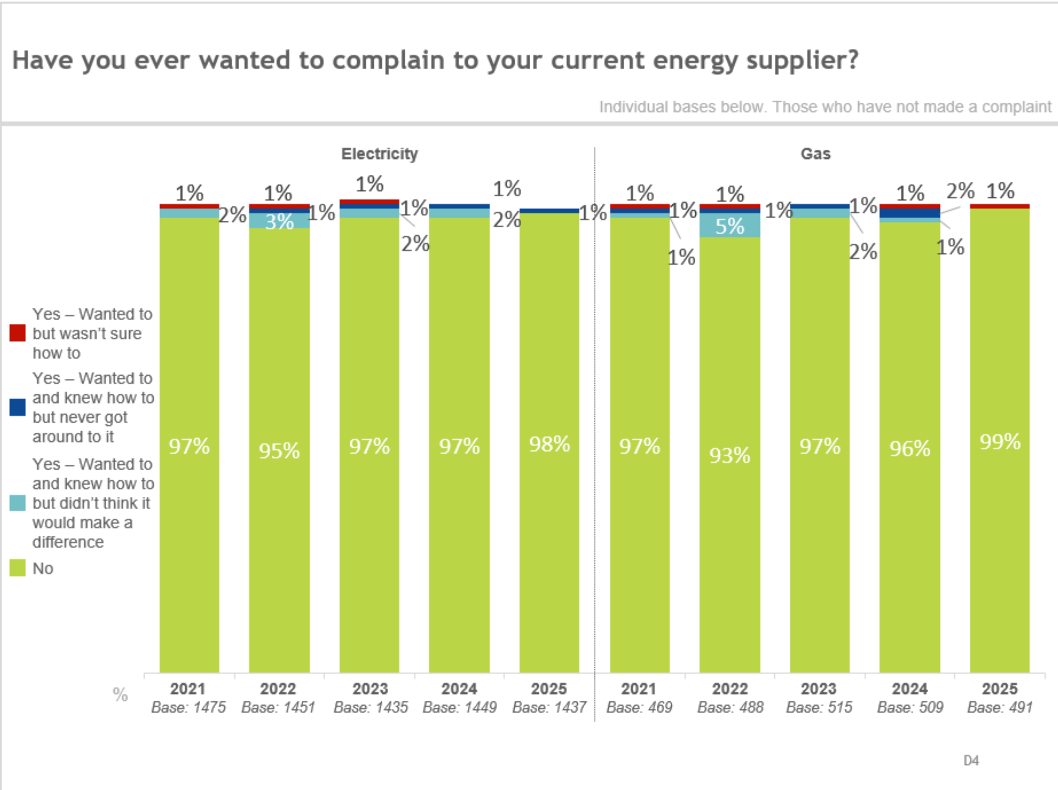
8 of the 13 gas customers who made a complaint to their supplier found the complaint process easy, compared to 3 respondents who found it difficult.

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 (98%) stated that they have never wanted to make a complaint to their electricity supplier, with 1% wanting to make a complaint but did not think it would make a difference. Similarly, almost all (99%) gas consumers confirmed that they have never wanted to make a complaint to their supplier. 1% wanted to make a complaint but did not think it would make a difference (see Figure 7.2).

Figure 7.2 Incidence of unreported complaints to energy supplier



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

8. 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 (96% were completely or somewhat aware) of being able to choose between different electricity suppliers amongst respondents:
  - 74% of those consumers agreed that having this choice gives access to better deals (similar to 75% in 2024);
  - 46% had compared electricity deals to see if they could switch supplier or tariff, the same proportion as in 2024; and
  - 42% 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 and 36% in 2024.
- 52% of electricity consumers and 48% of gas customers were confident that they are on the best energy deal for them.
- 45% of domestic consumers have switched their electricity supplier at least once at any time, a slight decrease from 47% in the 2024 Tracker:
  - Of those who have ever switched, 74% have done so within the last three years (similar to 75% in 2024);
  - In contrast, only 9% of those who have the option had switched gas suppliers.
- Respondents aged 65 and over, who are not confident with using the internet and who have a credit meter for electricity were among the subgroups who were less likely to have switched their electricity supplier at any time.
- Feeling they were overpaying (47%) and reacting to a promotional offer from another supplier (32%) were the main drivers for switching electricity supplier.
- 34% of electricity consumers who had switched did so through a doorstep seller, down from 40% in 2024.
- 82% reported a positive experience with switching electricity supplier.
- Of those respondents who had never switched electricity supplier, 72% had never switched due to satisfaction with their current service, while 29% thought it would be too much hassle, decreasing from 40% in 2024[11].
- Of those respondents who had never switched gas supplier 67% had never switched due to satisfaction with their current service, which is an increase from 54% in 2024. 16% said it would be too much hassle, decreasing from 28% in 2024.

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

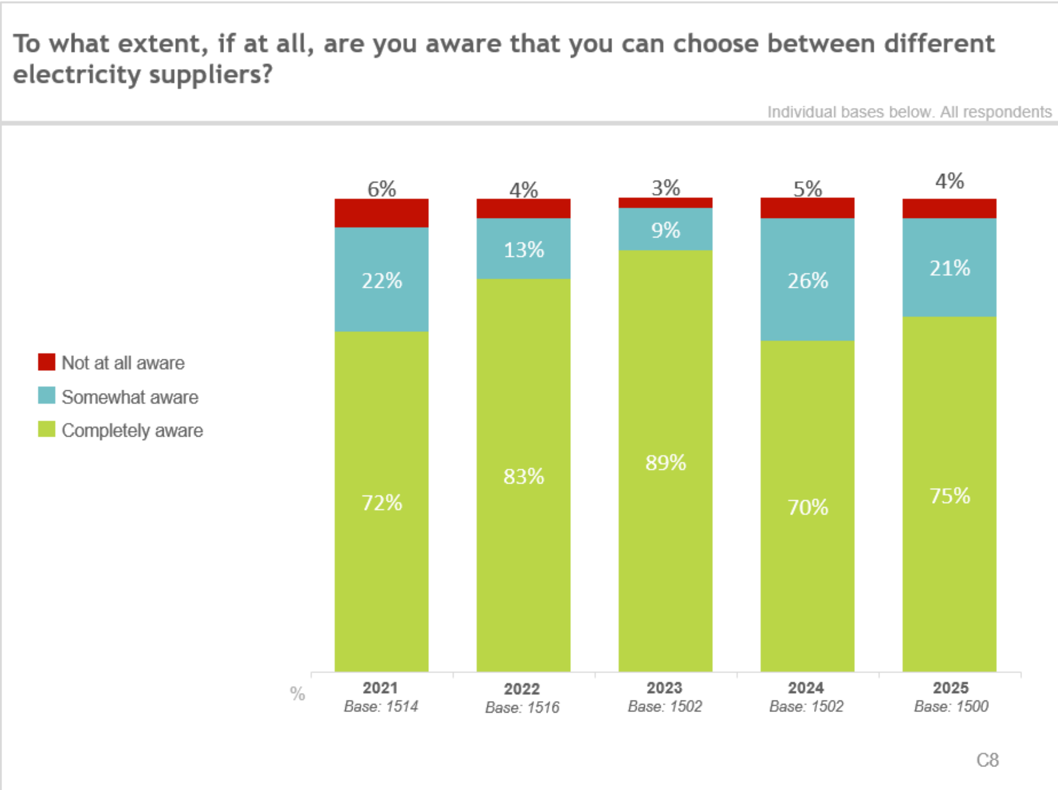
- 18% of electricity and 12% of gas customers said they were likely to switch their supplier in the next 12 months.
- Confidence using the internet appears to influence the likelihood of comparing energy deals and of switching:
  - Almost all (98%) confident internet users were aware they could choose between electricity suppliers;
  - 54% of those who are confident internet users said they had compared electricity deals compared to 25% who are not confident; and
  - Two thirds (68%) of respondents who are not confident internet users said they had never switched electricity supplier, compared to 47% 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 (96%) of domestic consumers were aware that they can choose between different electricity suppliers, including three quarters (75%) who were completely aware (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.

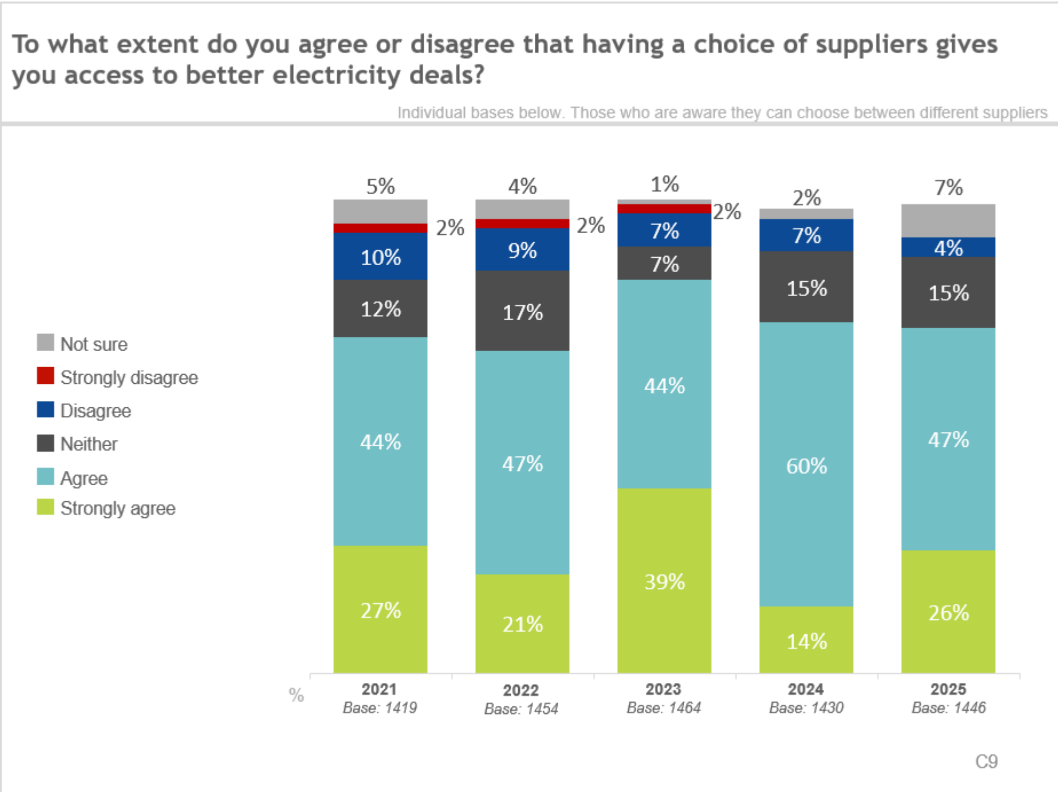
Respondents who consider themselves confident internet users (98%) were more likely to say they were aware than those who are not confident users (93%). Almost all (99%) electricity switchers stated that they were aware, compared to 95% of non-switchers (see Table 8.1).

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

		Completely aware	Somewhat aware	Not at all aware	*Total*
Overall	All *Base: 1500*	75%	21%	4%	*100%*
Confidence using internet	Not confident *Base: 306*	68%	25%	7%	*100%*
	Neither *Base: 288*	68%	27%	4%	*100%*
	Confident *Base: 906*	80%	17%	2%	*100%*
Electricity switching	Switchers *Base: 500*	84%	15%	1%	*100%*
	Non-switchers *Base: 1000*	71%	24%	5%	*100%*

74% of those who were aware that they can choose between suppliers agreed having a choice gives them access to better deals, compared to 4% who did not agree. While overall agreement was similar to the 2024 Tracker (75%), the percentage who said they 'strongly agree' increased from 14% in 2024 to 26% in the current Tracker. 7% stated that they were not sure, increasing from 2% in 2024 (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):

- Respondents aged 18 to 34 (87%) were more likely than those in the 35 to 44 (77%), 45 to 64 (75%) and 65 and over (65%) age groups to agree that having a choice of supplier gives access to better deals;
- Those who are not confident internet users (64%) were less likely to agree than those who consider themselves to be confident users (78%);
- Electricity switchers (86%) 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 (68%).

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

		Disagree	Neither	Agree	Not sure	*Total*
Overall	All *Base: 1446*	4%	15%	74%	7%	*100%*
Age	18 to 34 *Base: 197*	5%	5%	87%	4%	*100%*
	35 to 44 *Base: 244*	5%	12%	77%	6%	*100%*
	45 to 64 *Base: 585*	4%	15%	75%	6%	*100%*
	65 plus *Base: 418*	4%	20%	65%	11%	*100%*
Confidence using internet	Not confident *Base: 285*	5%	19%	64%	12%	*100%*
	Neither *Base: 276*	4%	16%	71%	9%	*100%*
	Confident *Base: 885*	4%	13%	78%	5%	*100%*
Electricity switching	Switchers *Base: 495*	4%	9%	86%	1%	*100%*
	Non-switchers *Base: 951*	5%	18%	68%	10%	*100%*

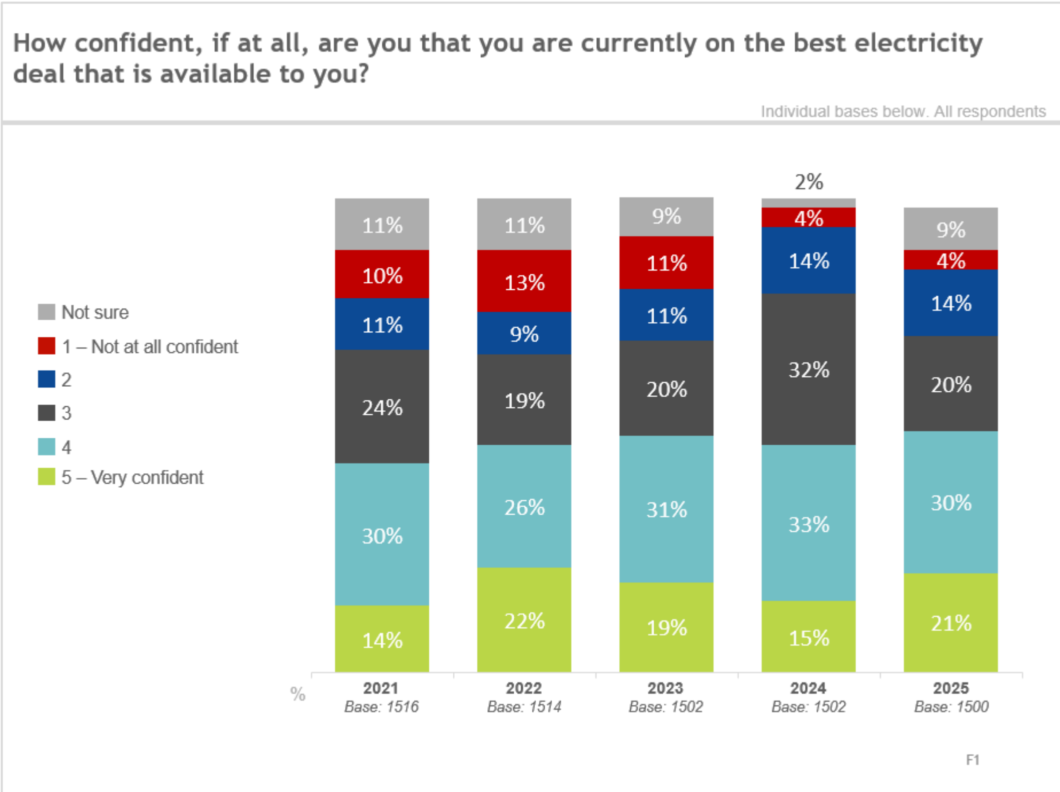
Confidence in current energy deal

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

Over half (52%) of domestic consumers provided a rating of ‘4’ or ‘5’, including 21% who said they were ‘very confident’ that they were on the best electricity deal (increasing from 15% in the previous Tracker). One in five (20%, down from 32% in 2024) gave a rating of ‘3’, while 19% 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):

- While there were no significant differences between those who said they were confident, respondents who have someone in their household with a disability or illness (23%) were more likely to report being not confident that they were on the best electricity deal than those without (18%);
- Respondents who have children in their household (23%) were more likely to say they were not confident that they were on the best electricity deal available to them than those without children (17%), although no significant differences were observed between those saying they were confident;
- 56% of those who consider themselves to be confident internet users said that they were confident they were on the best electricity deal available, compared to 44% who do not consider themselves to be confident internet users; and
- Electricity switchers (60%) were more likely to be confident they were on the best deal than non-switchers (47%).

Table 8.3 Confidence in electricity deal by disability/illness, children, confidence using the internet, and electricity switching

		Not confident (1,2)	Neither (3)	Confident (4,5)	Don't know	*Total*
Overall	All *Base: 1500*	19%	20%	52%	9%	*100%*
Disability/ illness	Yes *Base: 354*	23%	17%	49%	10%	*100%*
	No *Base: 1031*	18%	22%	52%	9%	*100%*
Children	Yes *Base: 415*	23%	19%	53%	5%	*100%*
	No *Base: 1047*	17%	21%	52%	11%	*100%*
Confidence using internet	Not confident *Base: 306*	19%	21%	44%	16%	*100%*
	Neither *Base: 288*	19%	26%	46%	9%	*100%*
	Confident *Base: 906*	19%	18%	56%	7%	*100%*
Electricity switching	Switchers *Base: 500*	17%	18%	60%	5%	*100%*
	Non-switchers *Base: 1000*	20%	21%	47%	11%	*100%*

Gas

Respondents with gas heating were slightly less likely to be confident that they were on the best deal compared to electricity consumers. 48% said that they were confident with the deal they were on (rating ‘4’ or ‘5’, compared to 44% in 2024), while 16% gave a rating of ‘1’ or ‘2’ (compared to 24% in 2024) (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

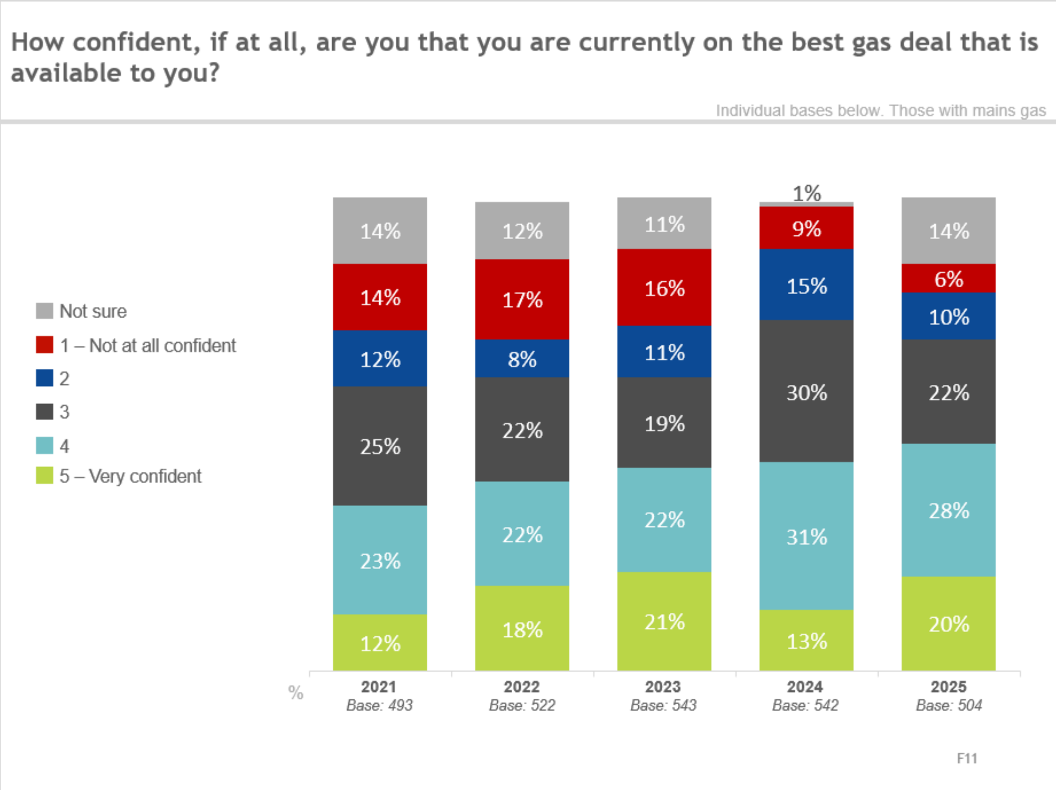


Table 8.4 Confidence in gas deal by payment method and switching behaviour

		Not confident (1,2)	Neither (3)	Confident (4,5)	Not sure	*Total*
Overall	All *Base: 504*	16%	22%	48%	14%	*100%*
Gas payment method	Prepayment meter *Base: 279*	14%	20%	49%	16%	*100%*
	Credit meter *Base: 225*	18%	23%	46%	13%	*100%*
Gas switching	Switchers *Base: 31*	26%	23%	52%	-	*100%*
	Non-switchers *Base: 473*	15%	22%	48%	15%	*100%*

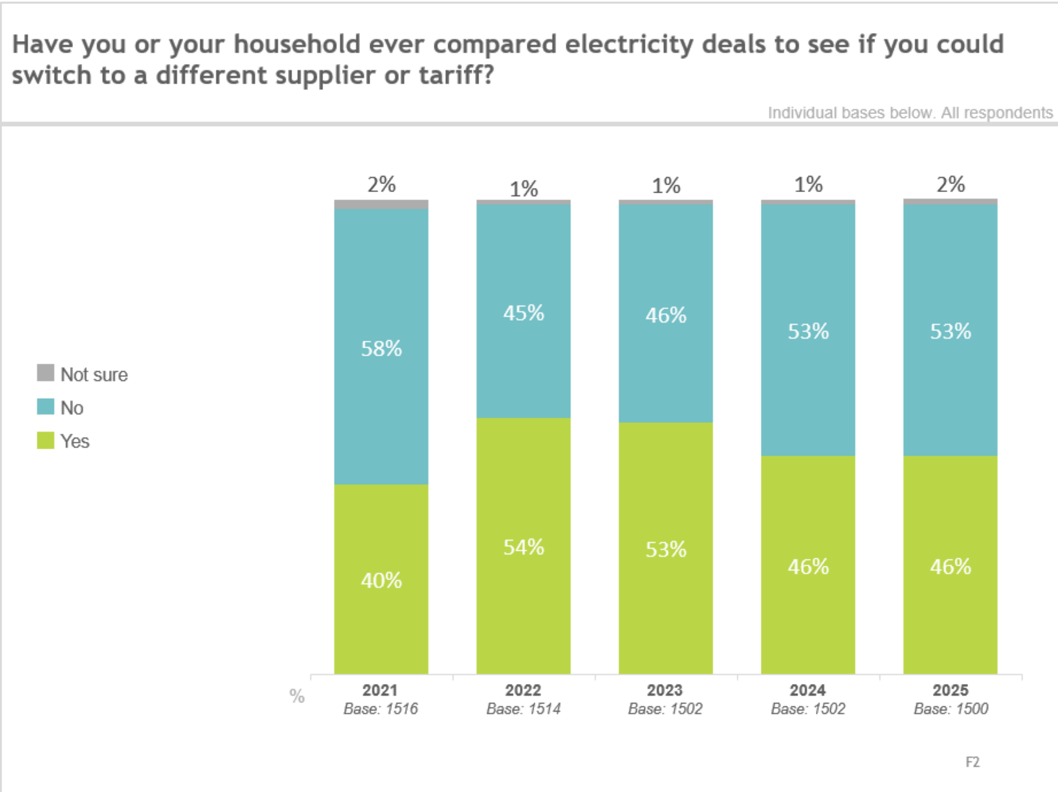
Comparing energy deals

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

Electricity

46% of domestic consumers had compared their electricity deal, the same as in 2024. Respondents who have a prepayment meter for electricity (49%) were more likely than those on a credit meter (43%) to confirm that they have compared electricity deals (see Figure 8.5 and Table 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):

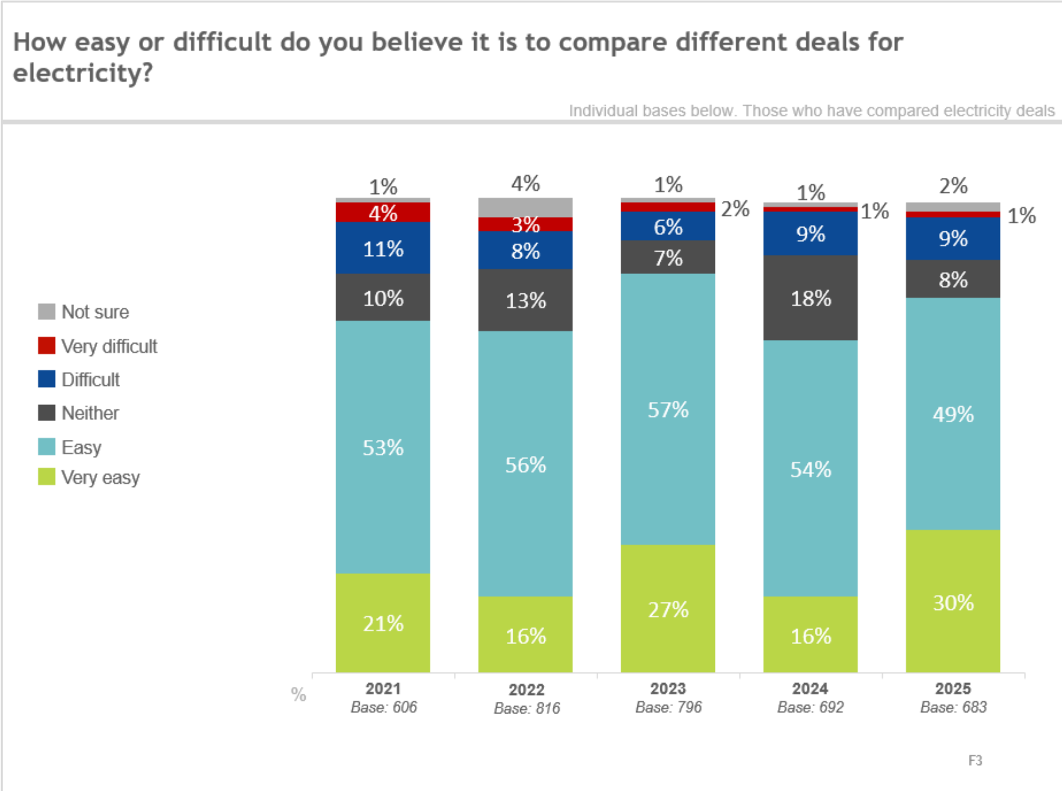
- Respondents aged 65 and over (31%) were less likely than those aged 18 to 34 (54%), 35 to 44 (54%) and 45 to 64 (50%) to say they had compared electricity deals;
- Respondents who consider themselves to be confident internet users (54%) were more likely to report comparing their electricity deal than those who do not consider themselves to be confident internet users (25%); 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 age, confidence using the internet, electricity payment method, and electricity switching

		Yes	No	Not sure	*Total*
Overall	All *Base: 1500*	46%	53%	2%	*100%*
Age	18 to 34 *Base: 201*	54%	45%	1%	*100%*
	35 to 44 *Base: 248*	54%	46%	0%	*100%*
	45 to 64 *Base: 605*	50%	49%	1%	*100%*
	65 plus *Base: 443*	31%	65%	3%	*100%*
Confidence using internet	Not confident *Base: 306*	25%	70%	5%	*100%*
	Neither *Base: 288*	40%	59%	1%	*100%*
	Confident *Base: 906*	54%	45%	1%	*100%*
Electricity payment method	Prepayment meter *Base: 570*	49%	49%	2%	*100%*
	Credit meter *Base: 930*	43%	55%	1%	*100%*
Electricity switching	Switchers *Base: 500*	78%	21%	0%	*100%*
	Non-switchers *Base: 1000*	29%	69%	2%	*100%*

79% 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 71% who found it easy and 10% who said it was difficult in 2024. It should also be noted that respondents who said comparing deals was neither easy nor difficult decreased from 18% in 2024 to 8% in the current Tracker (see Figure 8.6).

Figure 8.6 Ease of comparing electricity deal



Gas

38% of respondents with gas heating stated that they had the option to switch between gas suppliers in their area, with one third (33%) saying they do not have this option. It should also be noted that 29% were unsure whether they could switch their supplier.

Analysis of respondent's postcodes revealed that 72% of those with gas live in an area which would allow them a choice of supplier. One quarter (24%) of those who did not think they had a choice of supplier actually did have a choice, while 16% of those who thought they could choose between gas suppliers are unable to switch (see Figures 8.7 and 8.8).

Figure 8.7 Ability to switch gas supplier

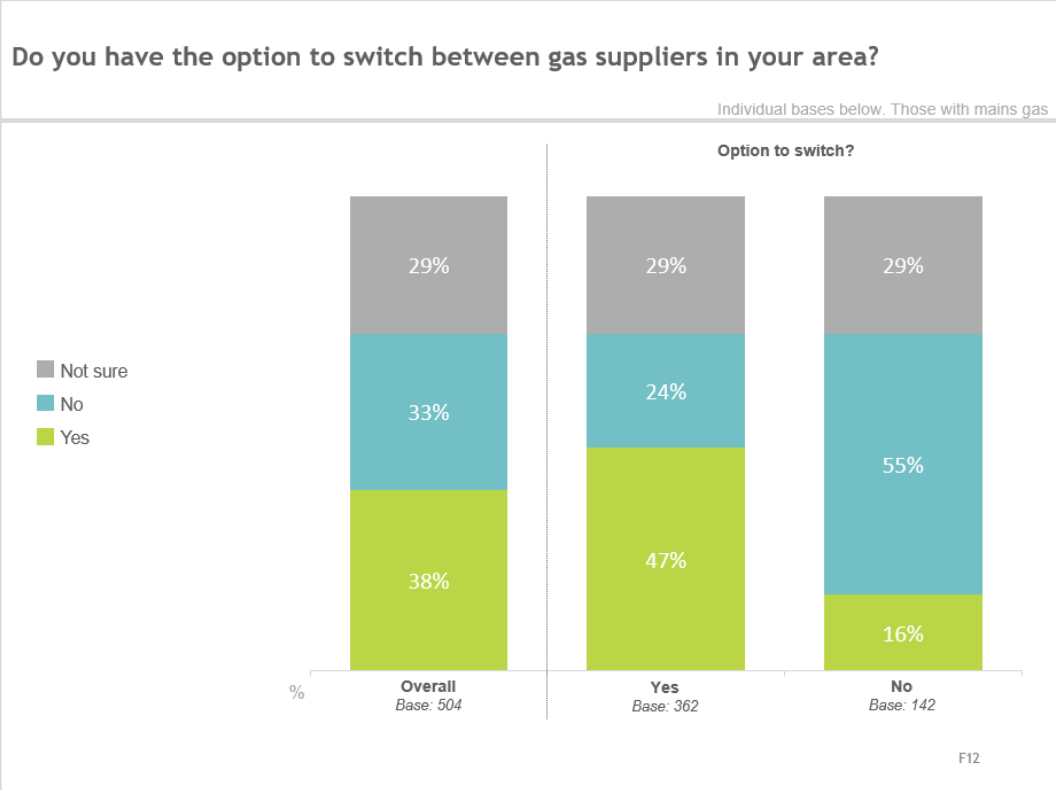
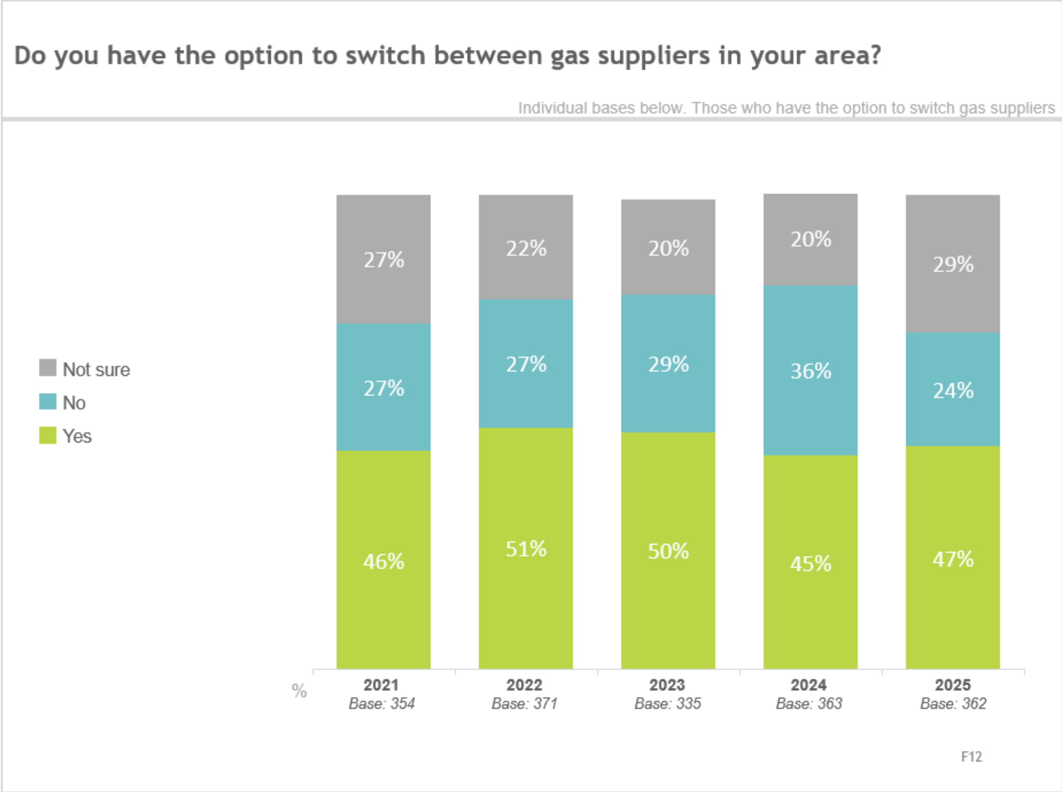


Figure 8.8 Ability to switch gas supplier (previous Tracker comparisons)



Two in five (42%) 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 36% of respondents in 2024 and 32% 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=26*) were more likely than non-switchers (*n=167*) to have compared deals (92% versus 35%) (see Table 8.6).

Figure 8.9 Incidence of comparing gas deal

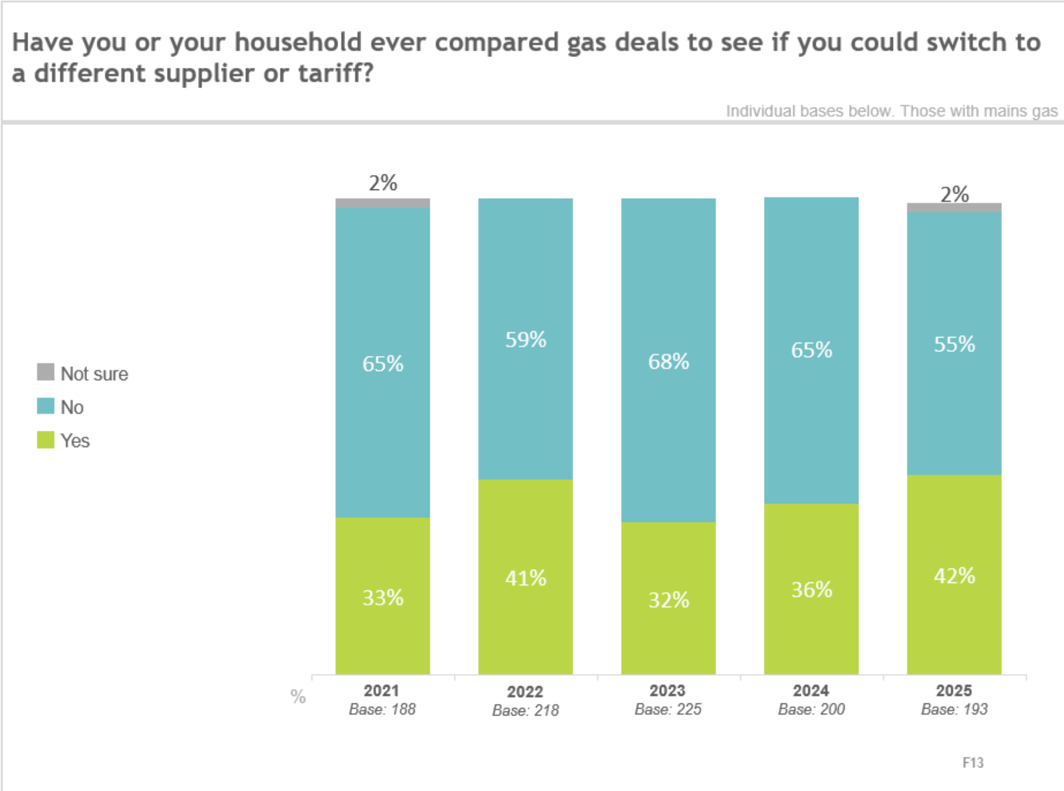


Table 8.6 Incidence of comparing gas deal by switching

		Yes	No	Not sure	*Total*
Overall	All *Base: 193*	42%	55%	2%	*100%*
Gas switching	Switchers *Base: 26*	92%	8%	-	*100%*
	Non-switchers *Base: 167*	35%	63%	2%	*100%*

Of those who had compared their gas deal (*n=82)*, the majority (84%, *n=69*) said that this was easy to do, whereas 6% (*n=5)* found it difficult.

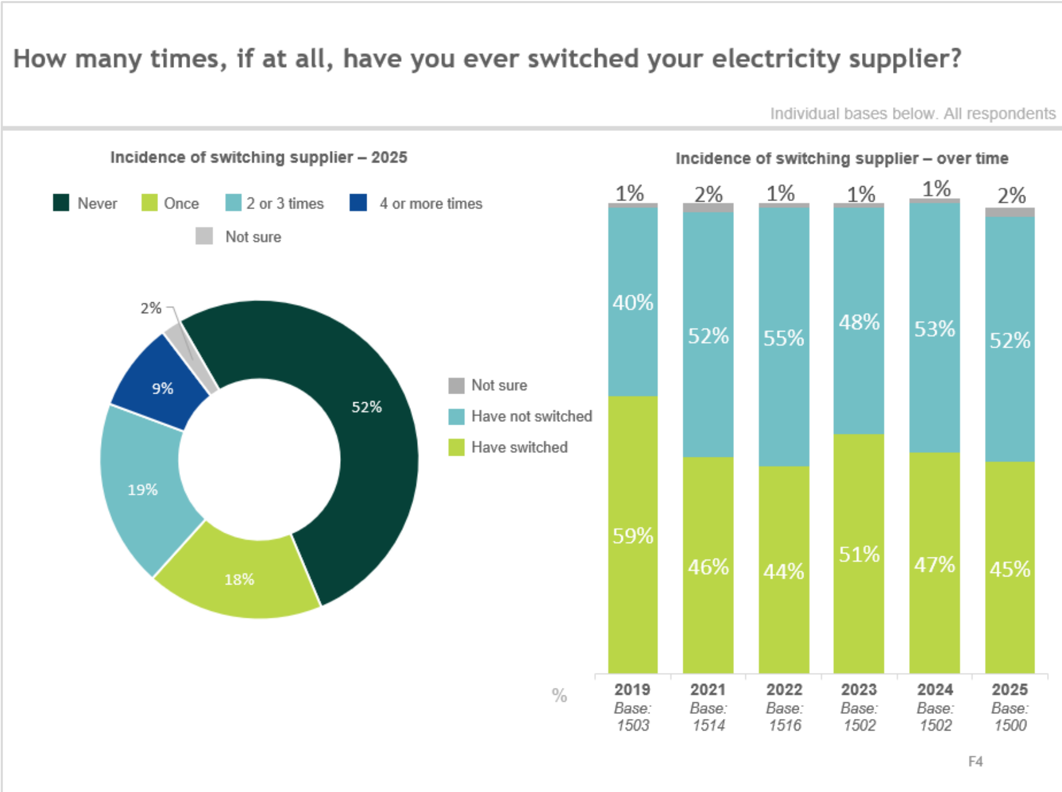
Incidence of switching supplier

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

Electricity

Over half (52%) of electricity customers reported that they have never switched their supplier. 18% said that they had switched once, and a further 19% had switched two or three times. 9% 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 8.7):

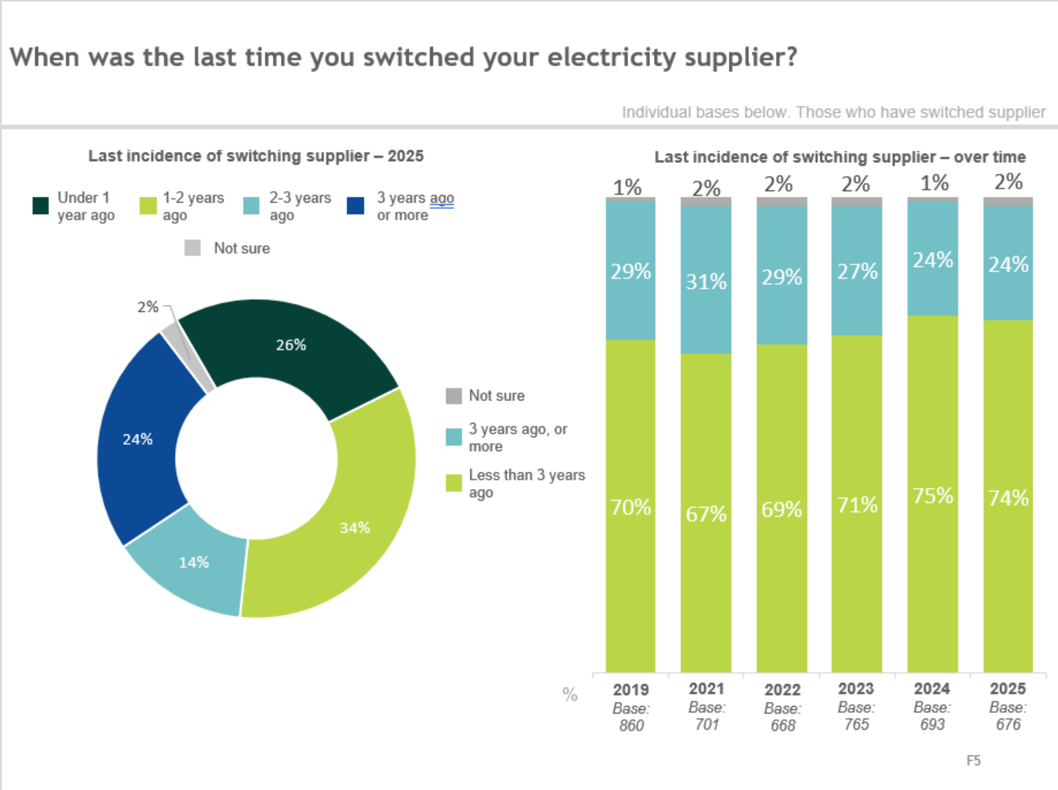
- 63% of respondents aged 65 and over said they had never switched their electricity supplier, compared to 51% aged 18 to 34, 44% aged 35 to 44, and 48% aged 45 to 64;
- Those who have someone in their household with a disability or illness (12%) were more likely to have switched at least four times than those without (8%);
- Respondents who have children (55%) were more likely to have switched their electricity supplier at least once than those who do not have children in their household (42%);
- Respondents who do not consider themselves as confident internet users (27%) were less likely to have switched at least once than those who are confident users (52%); and
- 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 (48%).

Table 8.7 Incidence of switching electricity supplier by age, disability/illness, children, confidence using the internet, and electricity payment method

		Never	Once	2 or 3 times	4 or more times	Don't know	*Total*
Overall	All *Base: 1500*	52%	18%	19%	9%	2%	*100%*
Age	Under 35 *Base:201*	51%	20%	20%	6%	3%	*100%*
	35-44 *Base:248*	44%	19%	24%	10%	2%	*100%*
	45-64 *Base:605*	48%	19%	20%	11%	1%	*100%*
	65 plus *Base: 443*	63%	15%	12%	6%	4%	*100%*
Disability/ illness	Yes *Base: 354*	49%	16%	20%	12%	3%	*100%*
	No *Base: 1031*	52%	19%	19%	8%	2%	*100%*
Children	Yes *Base: 415*	43%	18%	26%	10%	2%	*100%*
	No *Base: 1047*	56%	18%	15%	8%	2%	*100%*
Confidence using internet	Not confident *Base: 306*	68%	14%	8%	4%	6%	*100%*
	Neither *Base: 288*	53%	16%	17%	9%	3%	*100%*
	Confident *Base: 906*	47%	19%	22%	10%	1%	*100%*
Electricity payment method	Prepayment meter *Base: 570*	49%	17%	22%	9%	3%	*100%*
	Credit meter *Base: 930*	55%	18%	16%	9%	2%	*100%*

Respondents who had switched electricity supplier were then asked how long ago they had last switched suppliers. Three quarters (74%) had done so within the last three years, including one third (34%) 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 8.8):

- Respondents aged 18 to 34 (87%) were more likely to have switched electricity supplier in the last three years than those aged 45 to 64 (70%) and 65 plus (69%); and
- Respondents who have a prepayment meter for electricity (80%) were more likely to be switchers than those who have a credit meter (70%).

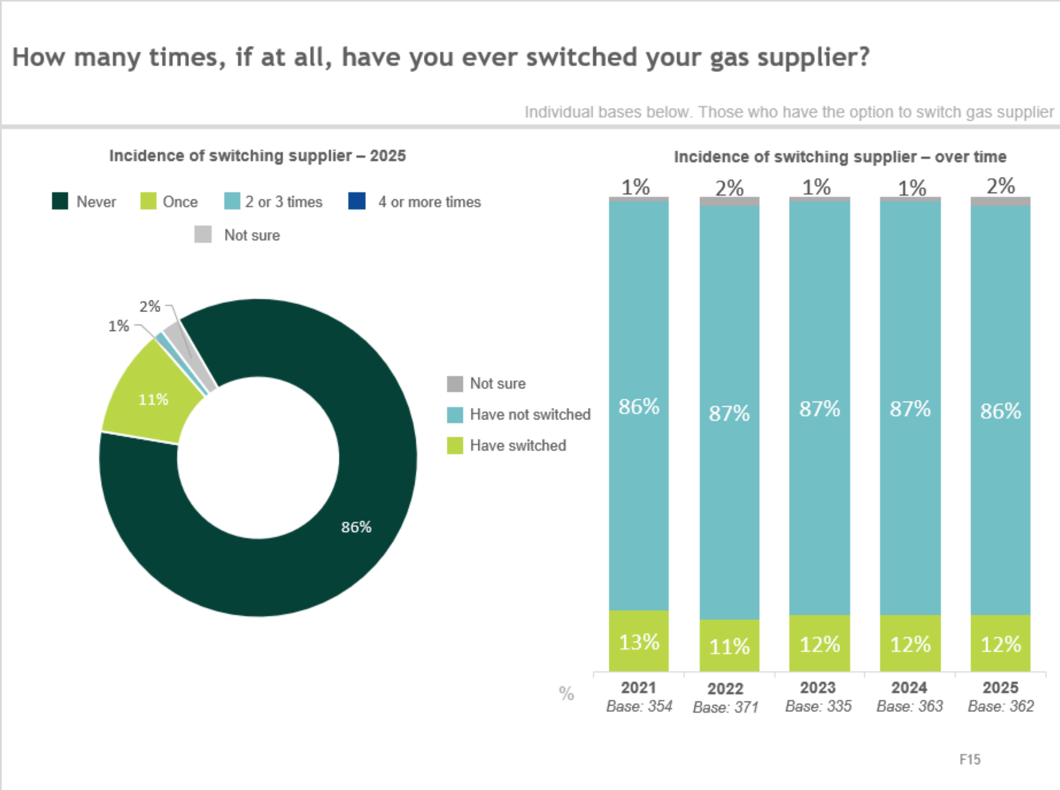
Table 8.8 Most recent instance of switching electricity supplier by age and electricity payment method

		Under 1 year ago	1-2 years ago	2-3 years ago	3 years ago or more	Not sure	*Total*
Overall	All *Base: 676*	26%	34%	14%	24%	2%	*100%*
Age	Under 35 *Base: 93*	42%	34%	11%	11%	2%	*100%*
	35-44 *Base: 133*	21%	44%	14%	18%	3%	*100%*
	45-64 *Base: 304*	22%	33%	16%	28%	2%	*100%*
	65 plus *Base: 146*	29%	27%	12%	27%	3%	*100%*
Electricity payment method	Prepayment meter *Base: 275*	27%	36%	17%	18%	3%	*100%*
	Credit meter *Base: 401*	25%	33%	12%	28%	2%	*100%*

Gas

86% of gas customers with the option to switch have never switched their supplier, while 12% have switched at least once.

Figure 8.12 Incidence of switching gas supplier



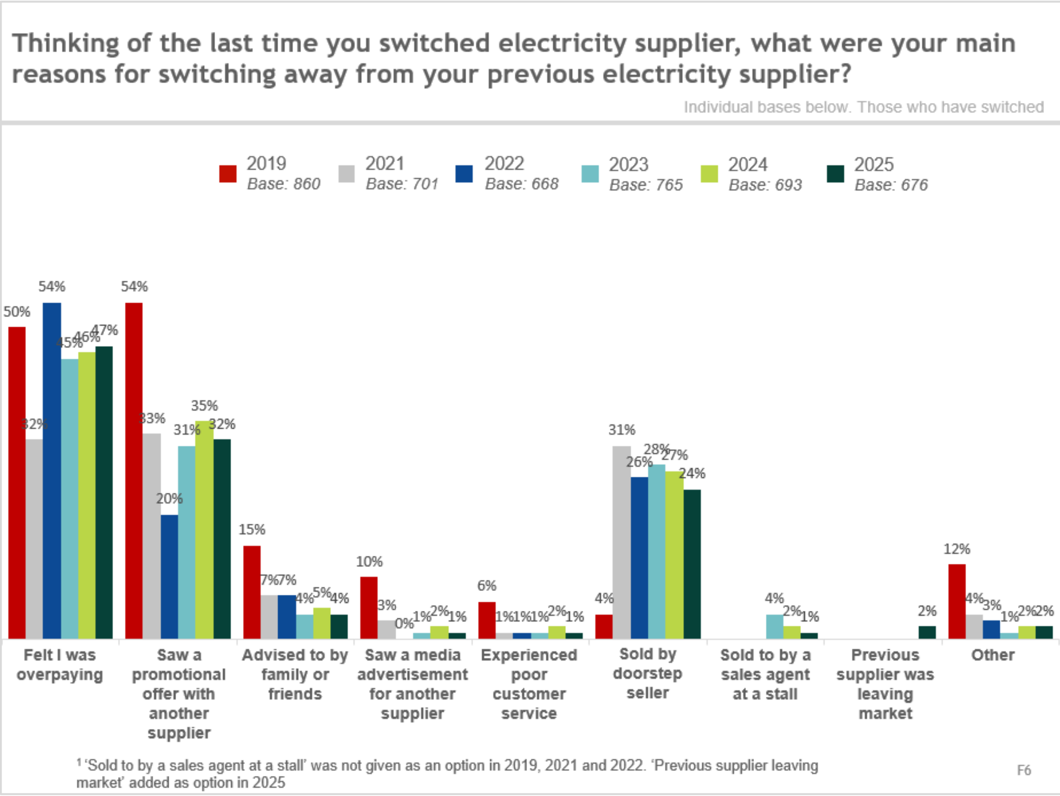
Of the 45 respondents who had switched their gas supplier, 31 had switched within the last three years, while 14 had switched at least three years ago.

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 (47%) felt that they were overpaying on their previous deal (similar to 46% in 2024), while one third (32%) had seen an offer from another supplier (down slightly from 35% in 2024). One quarter (24%) received an offer from a doorstep seller, down slightly from 27% in 2024.

Figure 8.13 Reasons for switching electricity supplier



In May 2024 it was announced that Electric Ireland would no longer operate in the residential sector in Northern Ireland[13]. 2% (*n=16*) of respondents gave this as a reason for switching their electricity supplier. 9 of the 16 respondents stated that they had to look for a new supplier themselves, while 5 respondents said they were switched automatically and 2 respondents were not sure.

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. 16 of the 45 respondents who had switched gas supplier said they felt they were overpaying on their previous deal, and a further 16 respondents said it was because they saw a promotional offer from another supplier. 8 respondents reported they had been sold their deal by a doorstep seller.

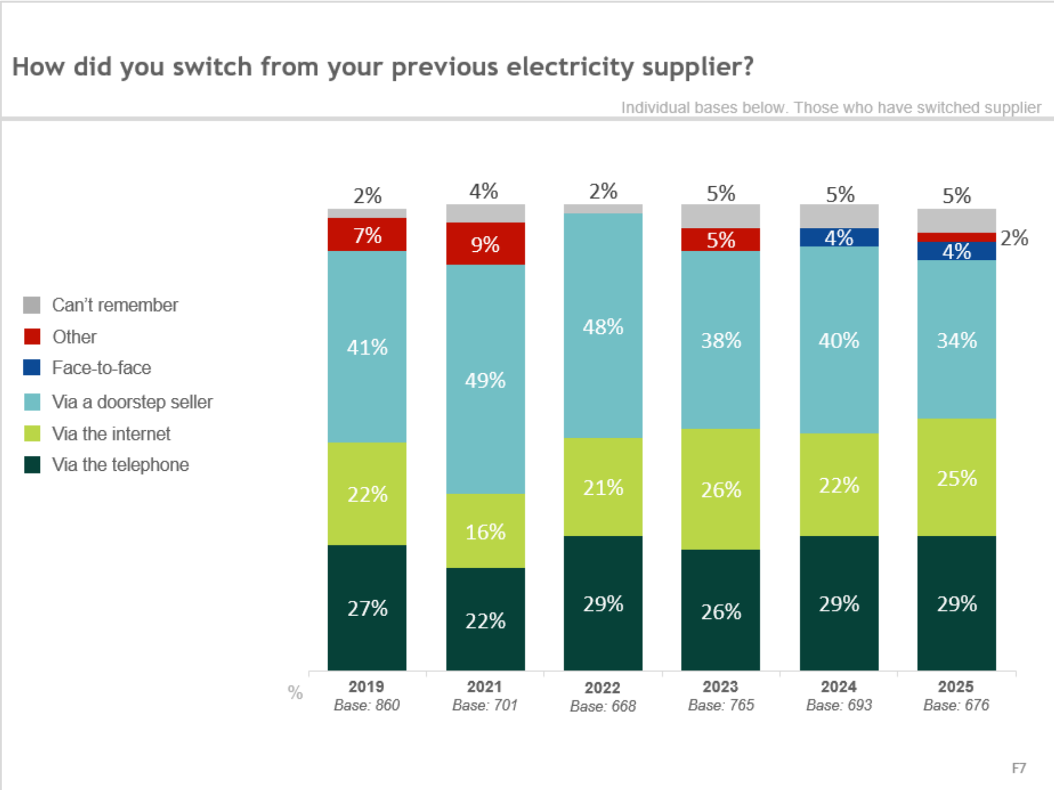
[13] https://www.electricireland.com/residential/about-us/transferring-to-power-ni

Experience of switching

Electricity

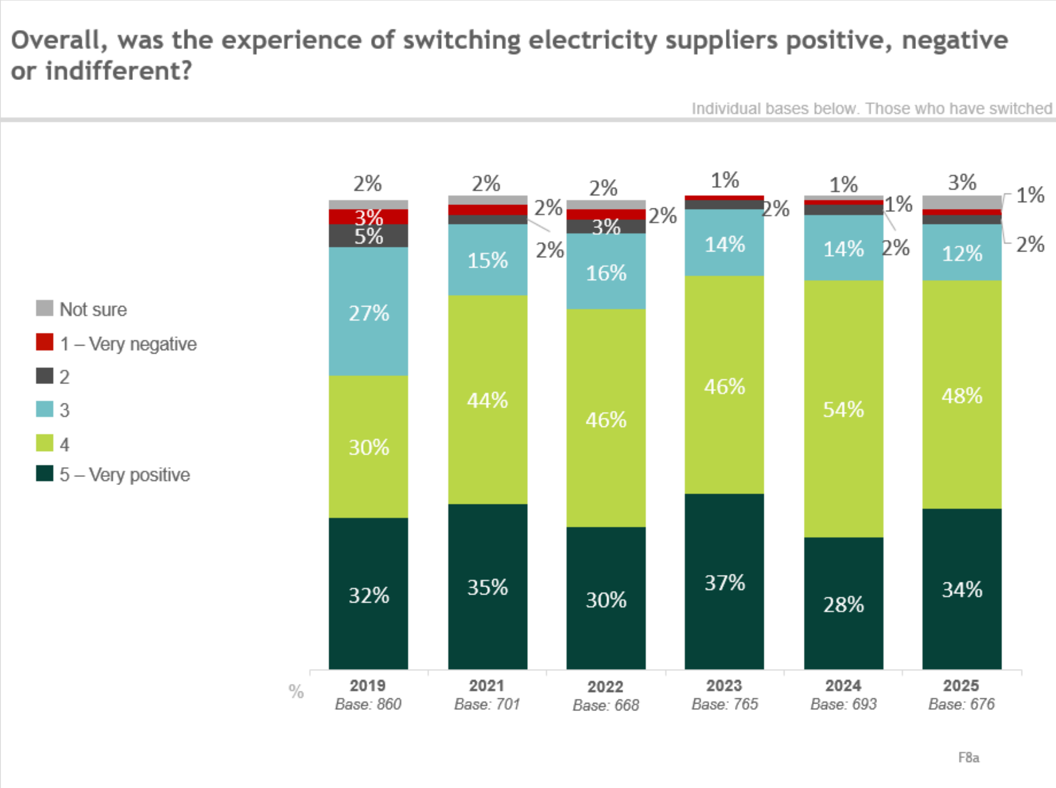
The most common method used to switch electricity supplier was through a doorstep seller, with one third (34%) saying this. However, the proportion who switched via a doorstep seller was at its lowest across all previous Trackers. Telephone (29%) and using the internet (25%) were the next most popular methods. 4% switched at a stall in a shopping centre or at an event. 2% mentioned other methods, with several respondents saying that family or friends that handled the process for them (see Figure 8.14).

Figure 8.14 Method of switching electricity supplier



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

18 of the 45 respondents who had switched their gas supplier did so via the telephone. 14 respondents switched after being approached by a doorstep seller, and 11 respondents switched via the internet.

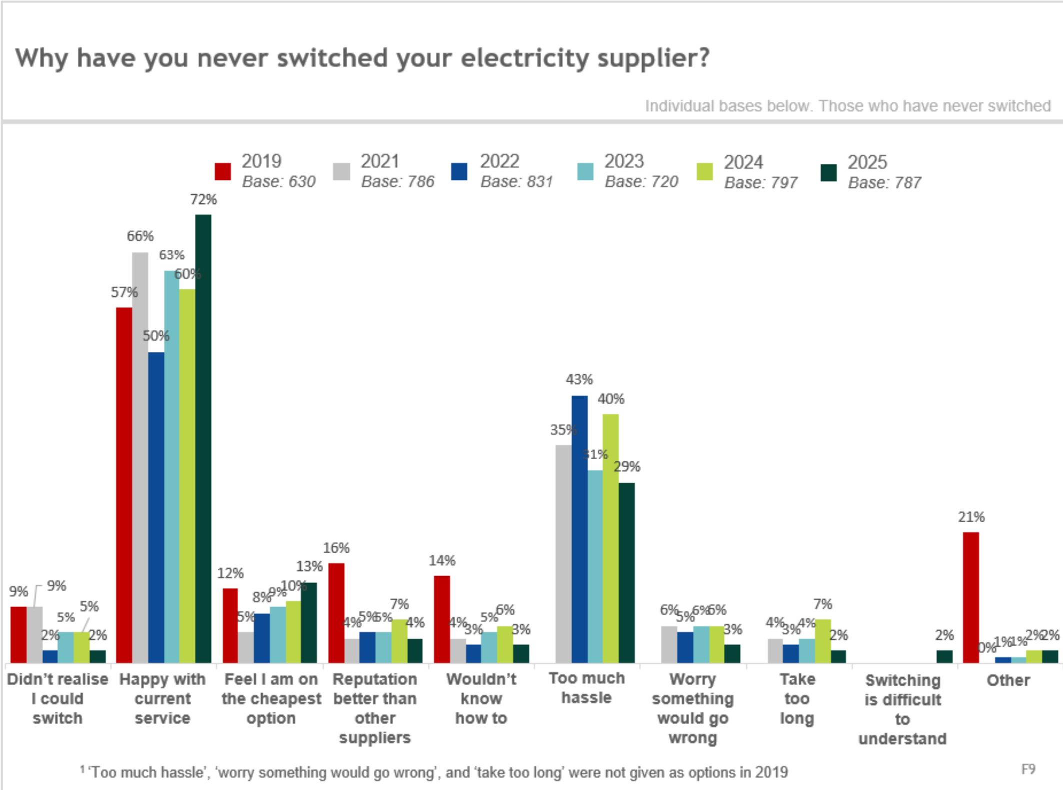
36 respondents had a positive (rating ‘4’ or ‘5’) experience of switching.

Reasons for not switching

Electricity

When asked why they had never switched electricity supplier, 72% said it was because they were happy with their current service (increasing from 60% in 2024), while a further 29% thought it would be too much hassle to switch (decreasing from 40% in 2023). 3% of respondents said they would not know how to go about switching their electricity supplier. 2% gave other reasons, including believing that they could not switch because they were renting their home or that that their landlord pays for their utilities, and feeling that there is a lack of choice in suppliers (see Figure 8.16).

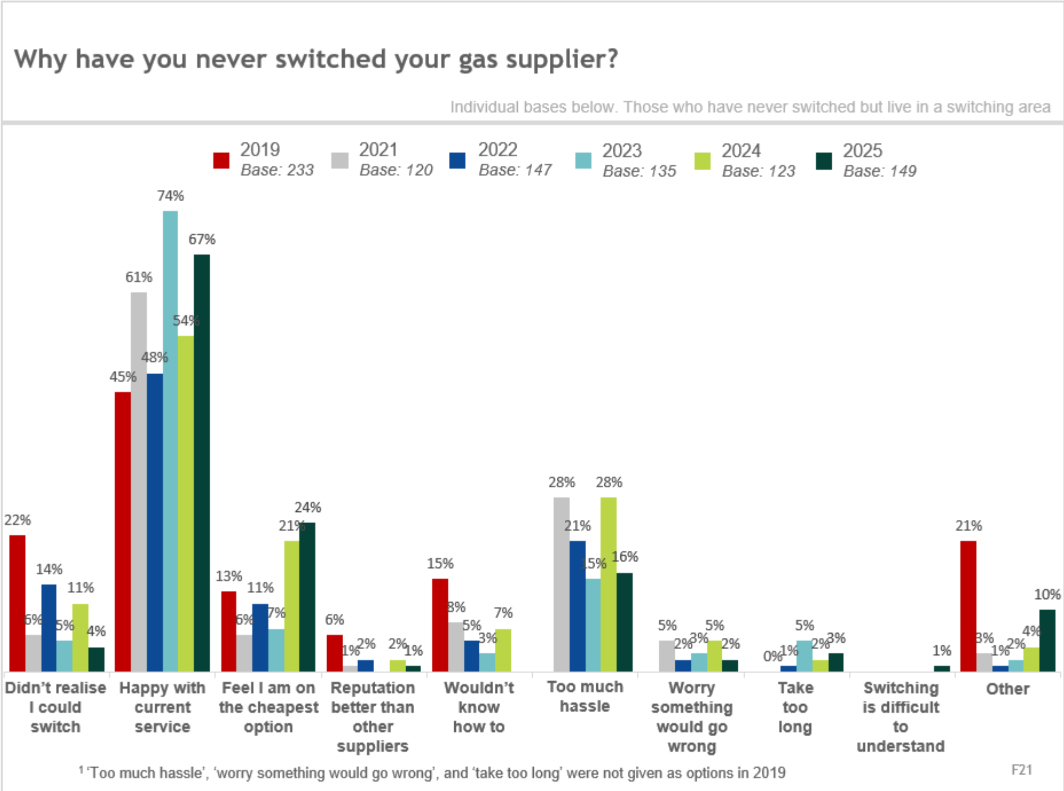
Figure 8.16 Reasons for not switching electricity supplier



Gas

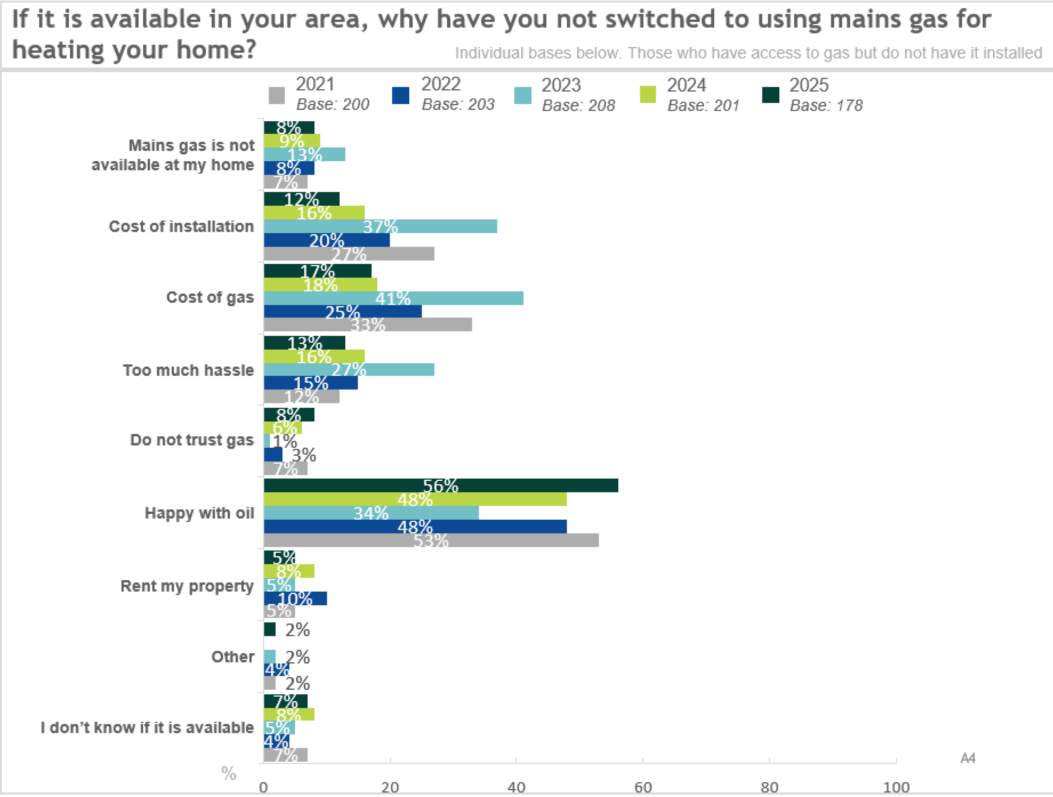
Gas customers were also most likely to state being happy with their current service as a reason for not switching, with the proportion saying this increasing from 54% in 2024 to 67% in the current Tracker. One quarter (24%) felt that they were already on the cheapest option (21% in 2024), and 16% thought that switching would be too much hassle (28% in 2024) (see Figure 8.17).

Figure 8.17 Reasons for not switching gas supplier



One third (33%) of respondents confirmed that they had access to gas in their area but did not have it installed in their home. 56% of these respondents said the reason for this was because they were content to remain on oil. 17% mentioned the cost of gas and 12% 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

18% of electricity customers and 12% 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

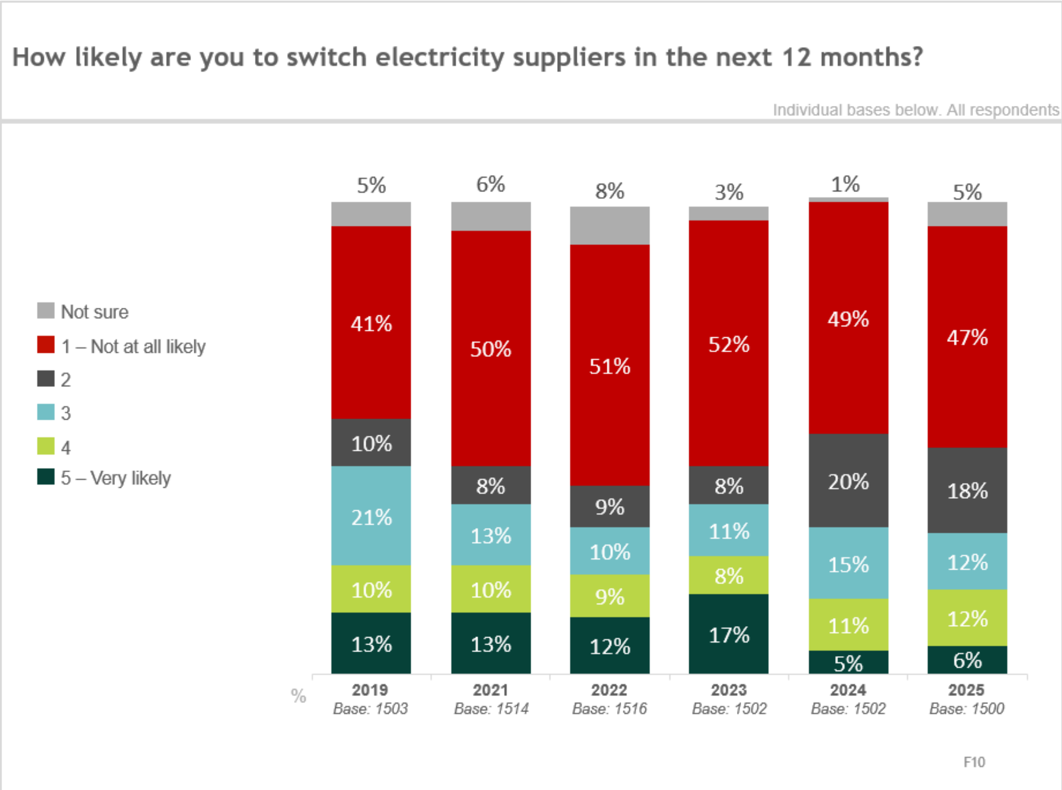
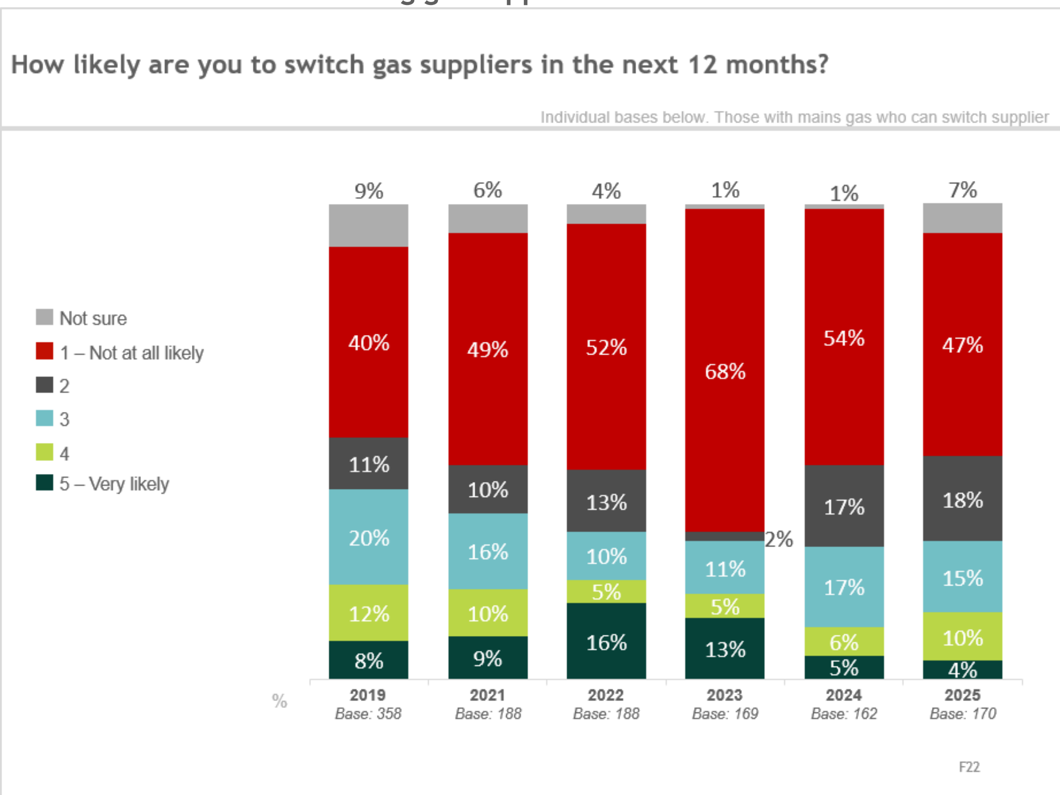


Figure 8.20 Likelihood of switching gas supplier



Some subgroups were significantly more likely to anticipate switching electricity supplier in the next year (see Table 8.9). These included:

- Three quarters (75%) of those aged 65 and over stated that they would be not likely to switch their electricity supplier in the next 12 months, in comparison with 65% aged 18 to 34, 59% aged 35 to 44, and 60% aged 45 to 64;
- Respondents who consider themselves to be confident internet users (22%) 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 (35%) were more likely than those who had not switched (9%) to say they would switch again in the next 12 months.

Table 8.9 Likelihood of switching electricity supplier by age, confidence using the internet, and electricity switching

		Not likely	Neither	Likely	Don't know	*Total*
Overall	All *Base: 1500*	65%	12%	18%	5%	*100%*
Age	Under 35 *Base:201*	65%	15%	16%	4%	*100%*
	35-44 *Base:248*	59%	11%	25%	5%	*100%*
	45-64 *Base:605*	60%	13%	21%	5%	*100%*
	65 plus *Base: 443*	75%	9%	11%	5%	*100%*
Confidence using internet	Not confident *Base: 306*	79%	8%	8%	6%	*100%*
	Neither *Base: 288*	65%	14%	16%	5%	*100%*
	Confident *Base: 906*	60%	13%	22%	5%	*100%*
Electricity switching	Switchers *Base: 500*	41%	18%	35%	6%	*100%*
	Non-switchers *Base: 1000*	77%	9%	9%	4%	*100%*

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

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

- These results should be considered in the context of their timing, as data was collected before the recent escalation of geopolitical tensions in the Middle East which may have altered perceptions of energy affordability.
- The proportion of respondents who sometimes struggle to pay their electricity bills has decreased further from 39% in 2022, 33% in 2023 and 23% in 2024 to 10% in the current Tracker:
  - The proportion who sometimes struggle with their electricity bills is now similar to the 2021 Tracker (13%).
  - 1% often or always struggle to pay, similar to 2024 (3%).
- For gas, the proportion of consumers who sometimes struggle to pay has also decreased further from 33% in 2022, 36% in 2023 and 27% in 2024 to 17% in the current Tracker:
  - The proportion who said they sometimes struggle with their gas bills is again now similar to what was observed in 2021 (15%).
  - 1% often or always struggle to pay, similar to 2% in 2024.
- 15% 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 a decrease from 2024 in which 24% with a prepayment meter had gone without electricity.
  - Of those who had gone without electricity, 36% reported that it was because they could not afford to top up.
- 3% of consumers reported that they have had to delay or go without other essentials so that they could pay for electricity, a reduction from 6% in 2024.
- 7% reported delaying or going without other essentials to pay for gas compared to 8% in the 2024 Tracker.
- 33% of respondents have reduced their electricity usage over the last year, which follows on from 42% in the 2024 Tracker, 71% in the 2023 and 85% in 2022.
- 2% of electricity respondents had borrowed money to pay their electricity bills, down from 5% in 2024.
- This was also true for gas customers, with 36% reducing their usage (42% in 2024, 71% in 2023 and 87% in 2022) and 3% borrowing money to pay their bill (6% in 2024).
- 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.

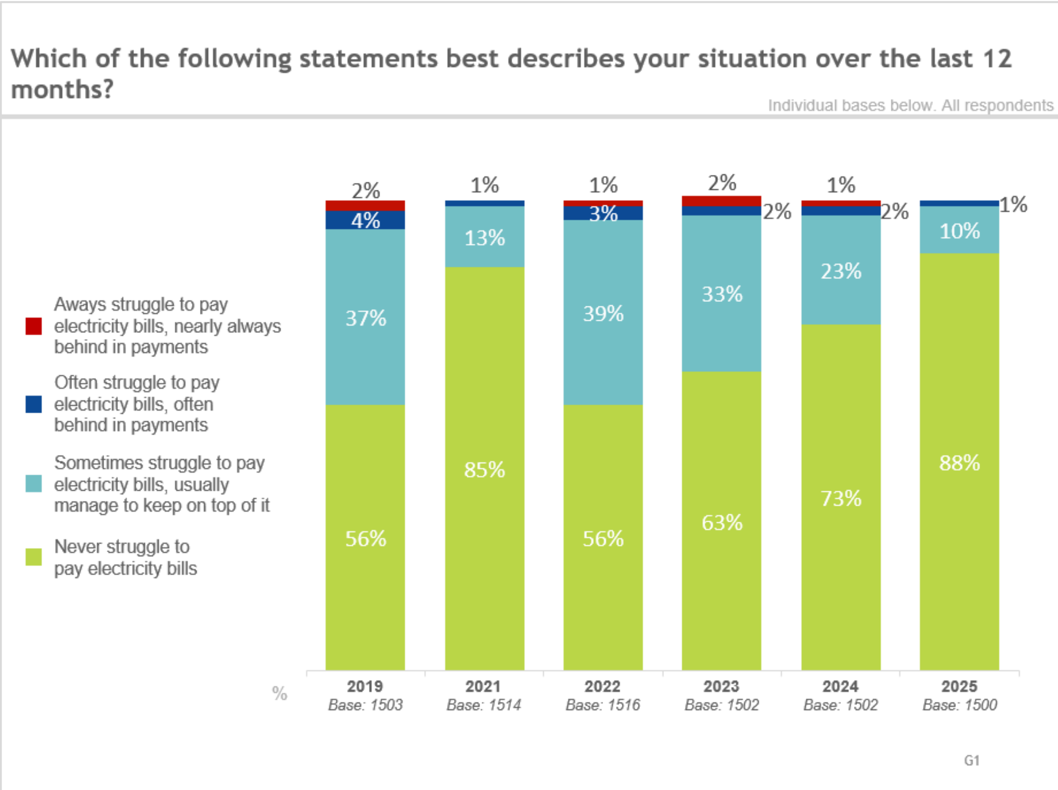
Current financial situation

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

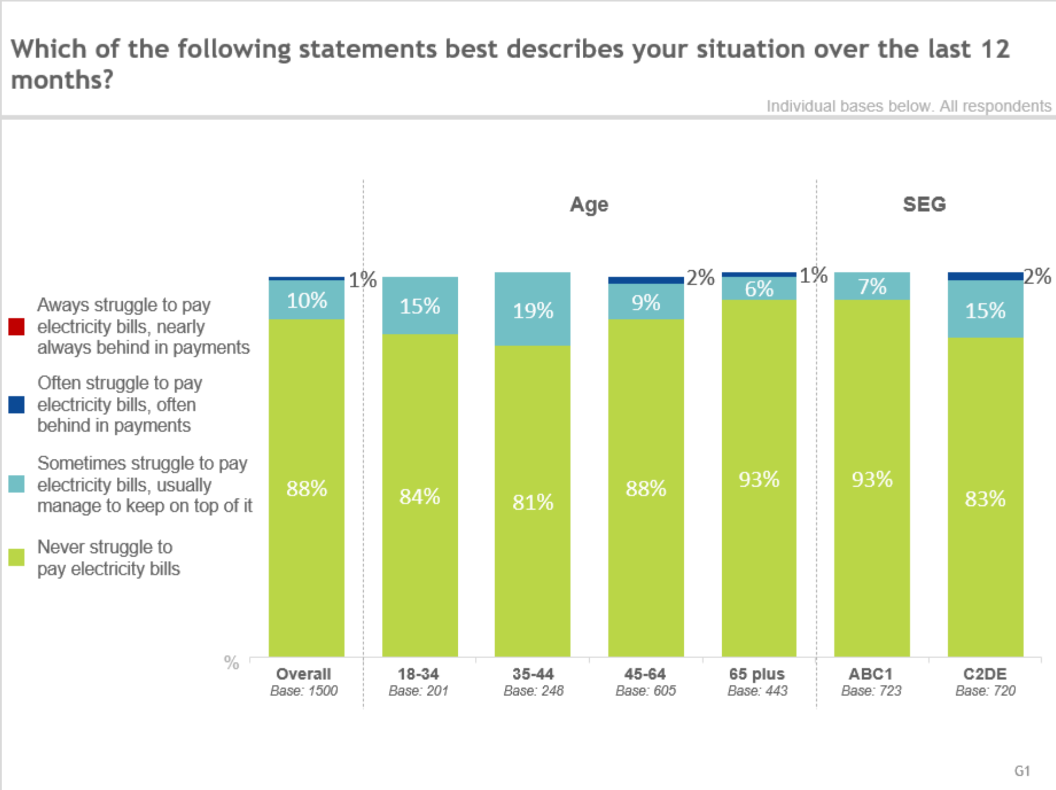
88% of respondents reported that they never struggle to pay their electricity bills, increasing further from 56% in 2022, 63% in 2023 and 73% in 2024 to be more similar to 85% in 2021. 10% said they sometimes struggle to pay their bills but usually were able to keep on top of them (down from 23% in 2024), while 1% stated that they were often behind in their payments.

Figure 9.1 Ability to pay electricity bills



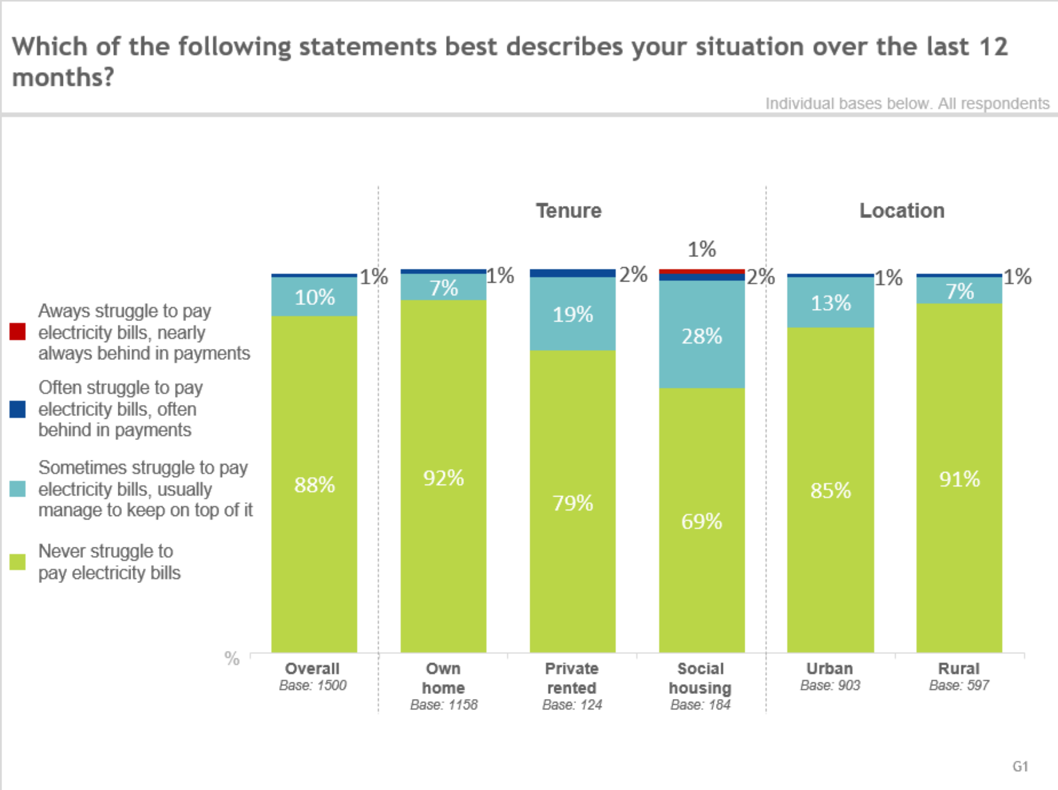
Respondents aged 18 to 34 (15%) and 35 to 44 (19%) were more likely than those in the 45 to 64 (9%) and 65 plus (6%) age groups to say that they sometimes struggle with their electricity bills. 15% of those in the C2DE group reported that they sometimes struggle to pay, compared to 7% in the ABC1 group (see Figure 9.2).

Figure 9.2 Ability to pay electricity bills by age and SEG



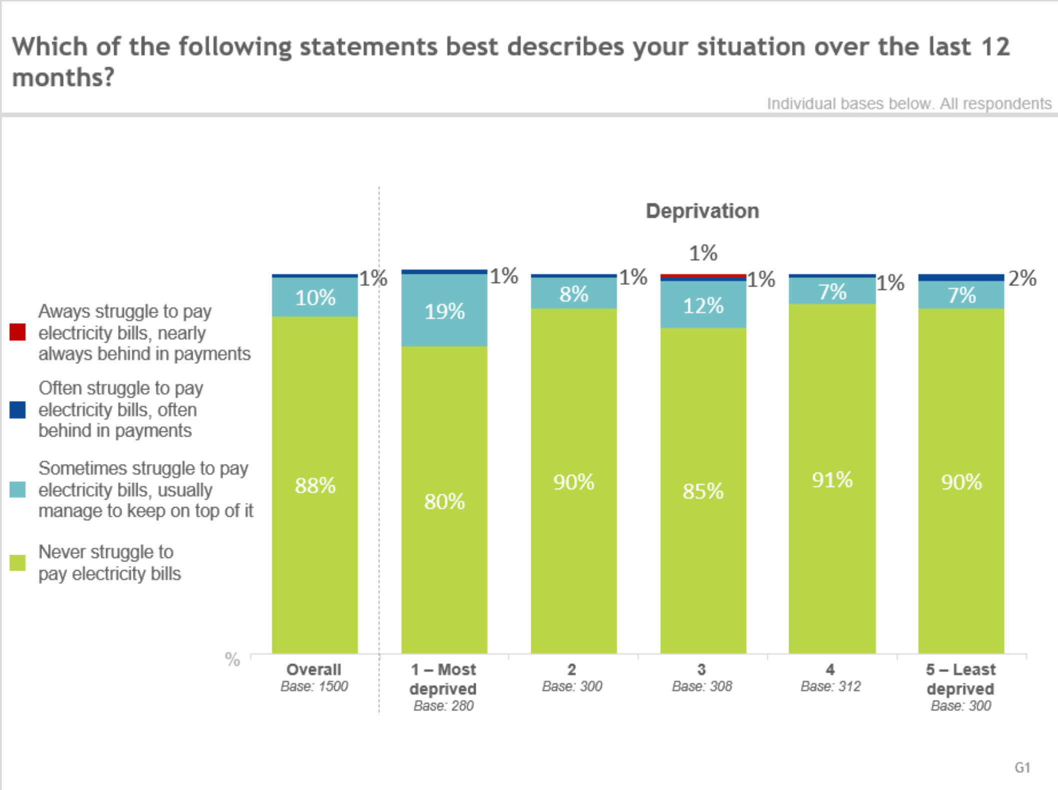
Those who live in social housing (28%) and who privately rent (19%) were more likely to say they sometimes struggle to pay their bills than those respondents who own their home (7%). 13% of those living in urban areas stated that they sometimes struggle, compared to 7% living in rural areas (see Figure 9.3).

Figure 9.3 Ability to pay electricity bills by tenure and location



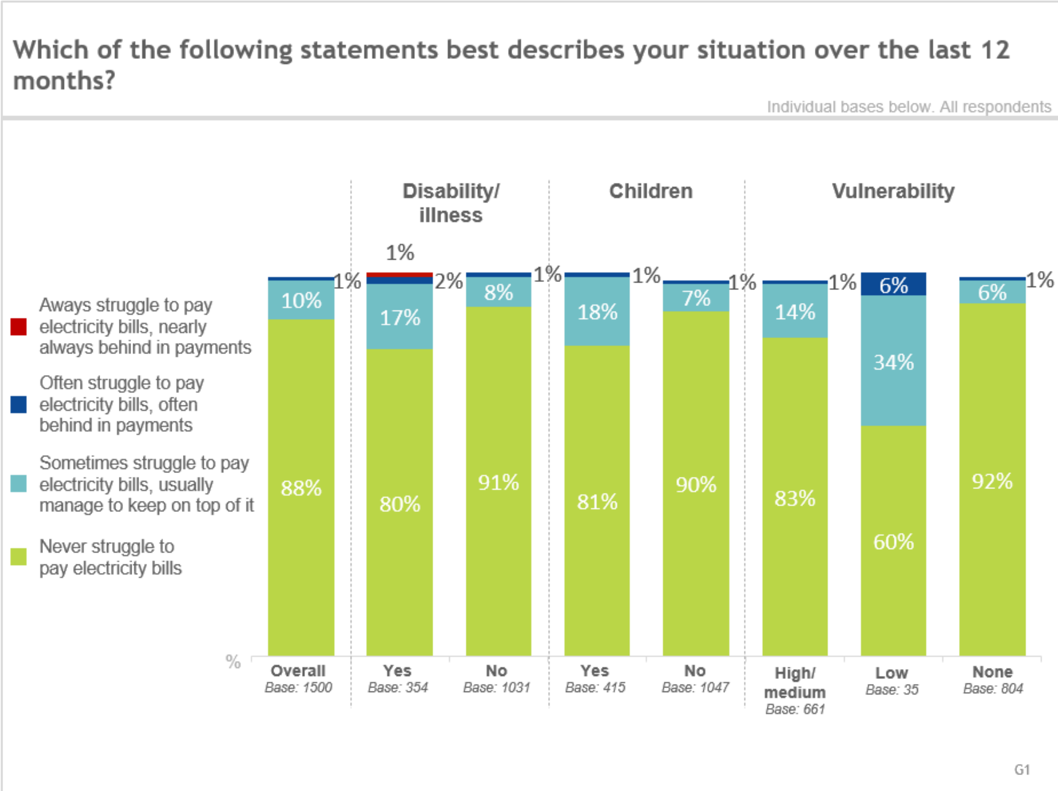
Respondents who live in the most deprived areas (19%) were more likely to report that they sometimes struggle to pay their electricity bill than those living in the least deprived areas (7%) (see Figure 9.4).

Figure 9.4 Ability to pay electricity bills by deprivation



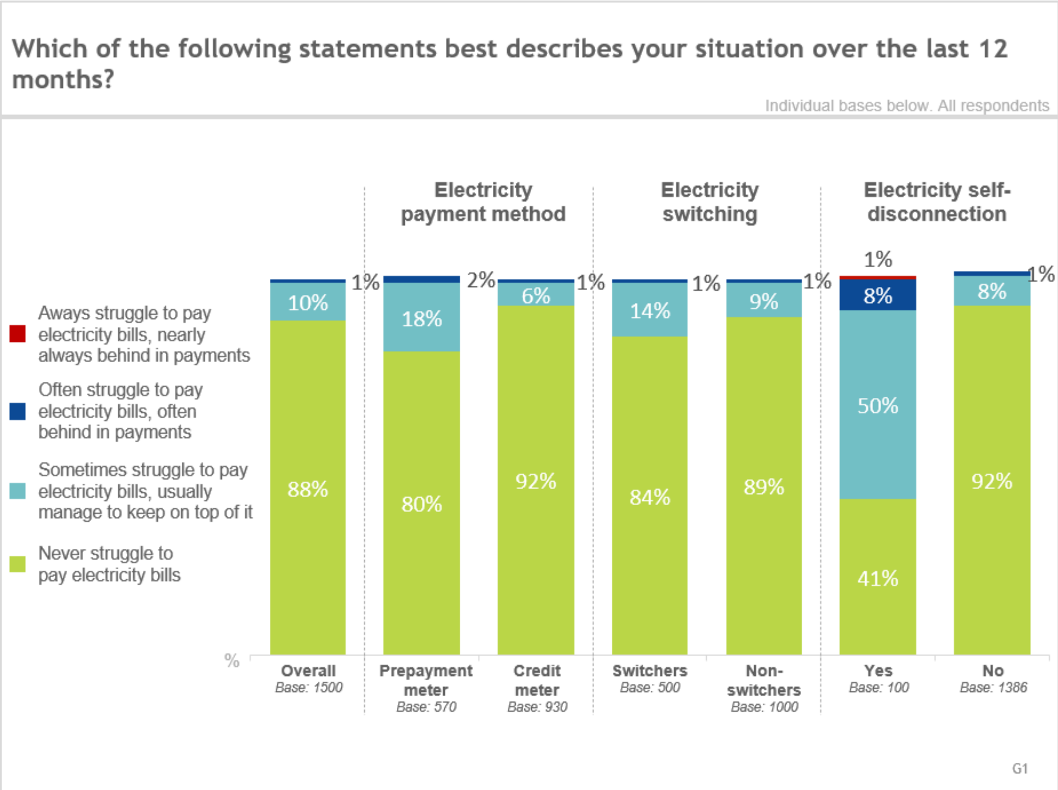
Respondents who have or live with someone who has a disability or illness (17%) were more likely than those who do not (8%) to say they sometimes struggle with their electricity bills, while those who have children in their household (18%) were more likely to state that they sometimes struggle when compared with those who do not have children (7%). 14% of respondents who are considered to be in the high or medium vulnerability group said they sometimes struggle, compared to 6% of those who are not vulnerable (see Figure 9.5).

Figure 9.5 Ability to pay electricity bills by disability/illness, children, and vulnerability



Respondents who have a prepayment meter for electricity (18%) were more likely than those with a credit meter (6%) to say they sometimes struggle to pay their electricity bills. Electricity switchers (14%) were more likely to indicate that they sometimes struggle than non-switchers (9%). Half (50%) of those who have self-disconnected from their electricity supply reported that they sometimes struggle to pay their electricity bill, with a further 9% saying they often or always struggle to keep up with payments. This compares to 8% and 1% respectively of those who have not self-disconnected (see Figure 9.6).

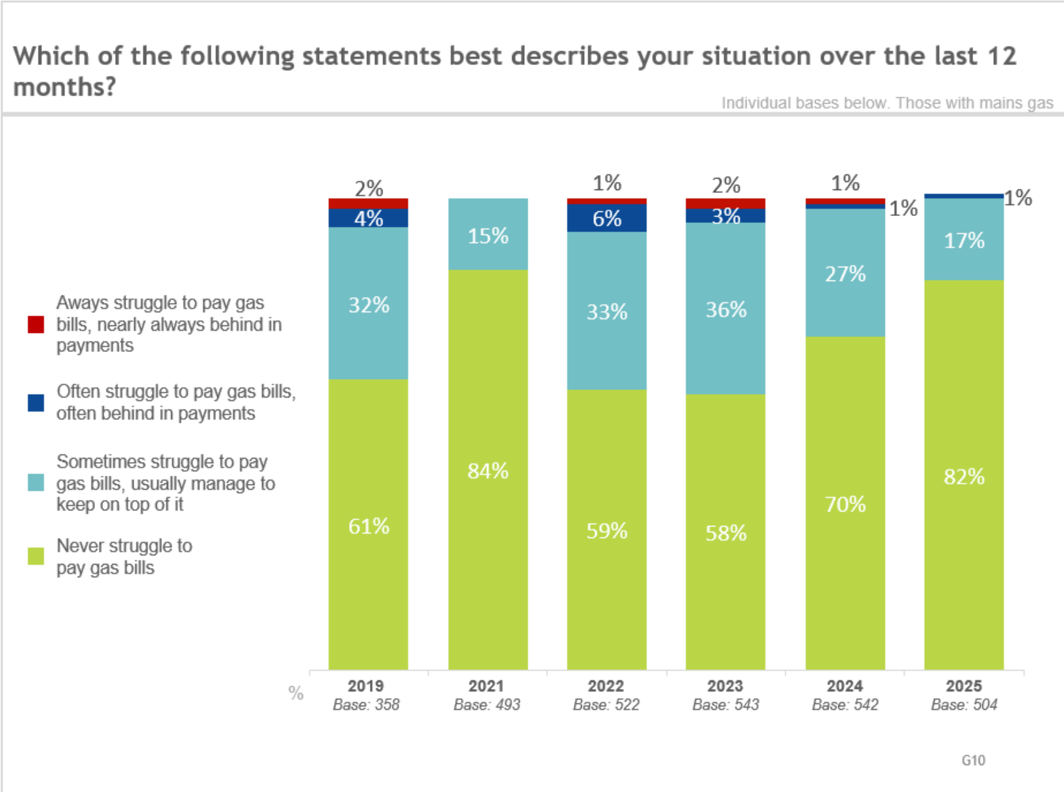
Figure 9.6 Ability to pay electricity bills by electricity payment method, electricity switching, and electricity self-disconnection



Gas

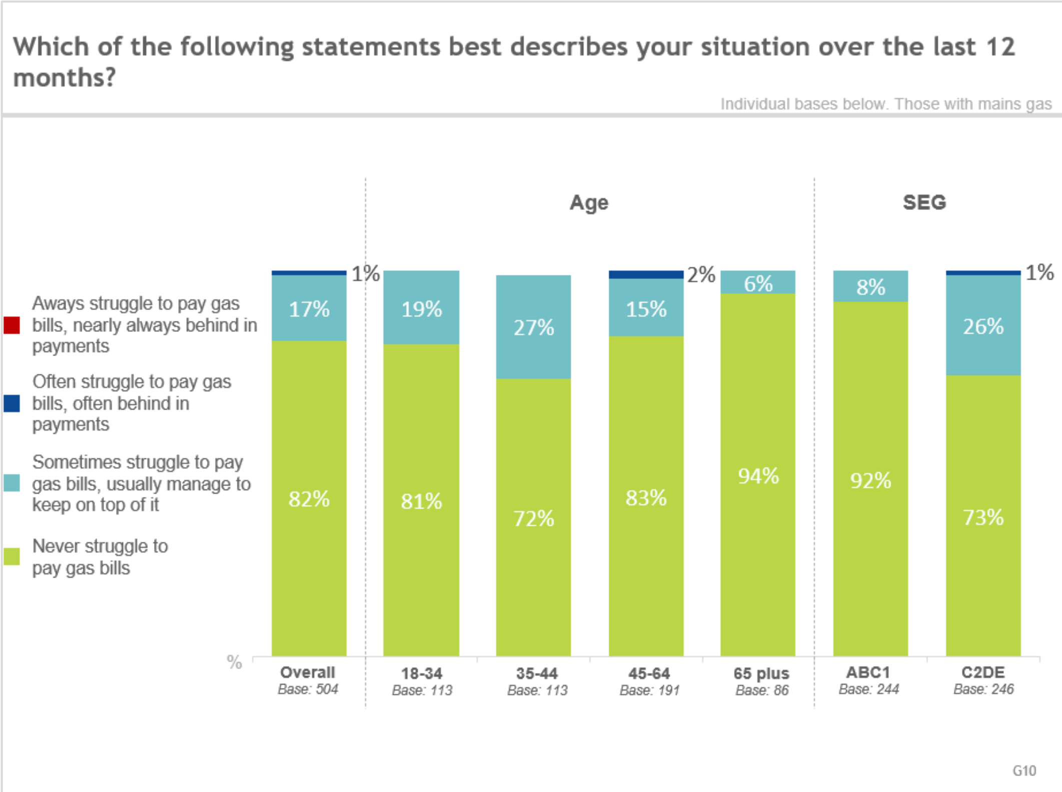
Four in five (82%) gas consumers stated that they never struggle to pay their gas bills and under one in five (17%) said that they sometimes struggle but were able to manage their bills. As with electricity, the proportion who never struggle with their gas bills has continued to increase from the previous Trackers (59% in 2022, 58% in 2023, and 70% in 2024) to now be similar to the results from 2021 (84%) (see Figure 9.7).

Figure 9.7 Ability to pay gas bills



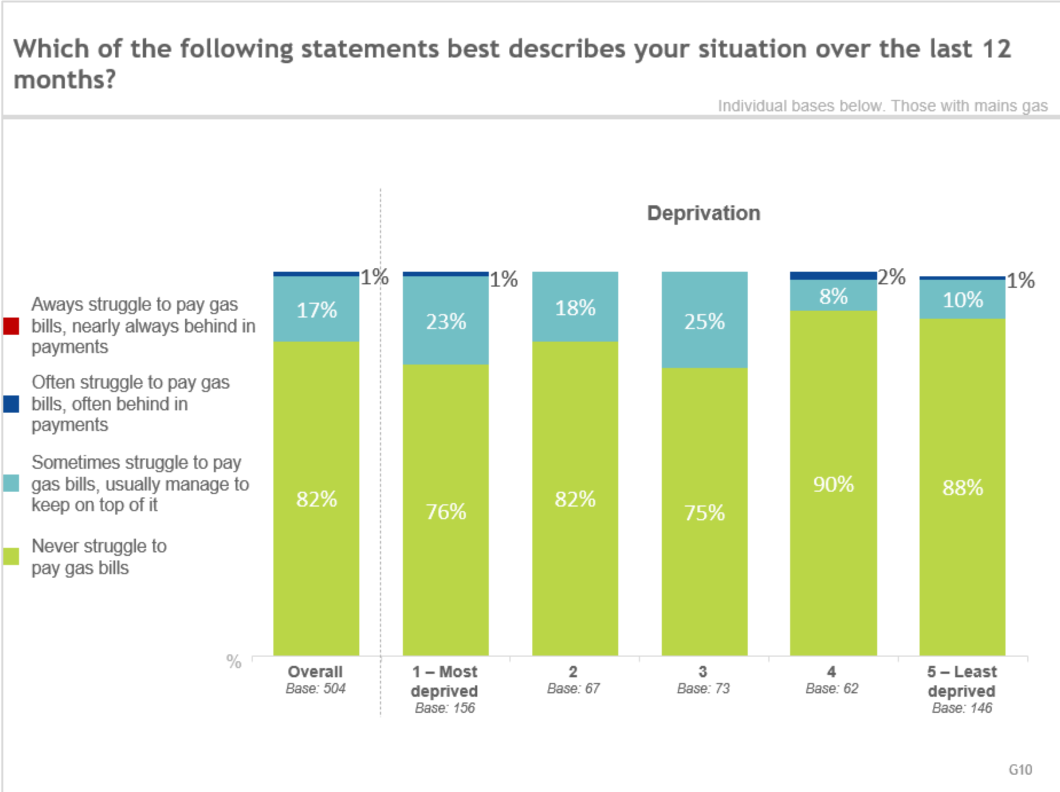
Respondents aged 18 to 34 (19%) and 35 to 44 (27%) were more likely to say that they sometimes struggle with their gas bills than those aged 45 to 64 (15%) and 65 and over (6%). One quarter (26%) of those in the C2DE group reported that they sometimes struggle with their gas bills, compared to 8% in the ABC1 group (see Figure 9.8).

Figure 9.8 Ability to pay gas bills by age and SEG



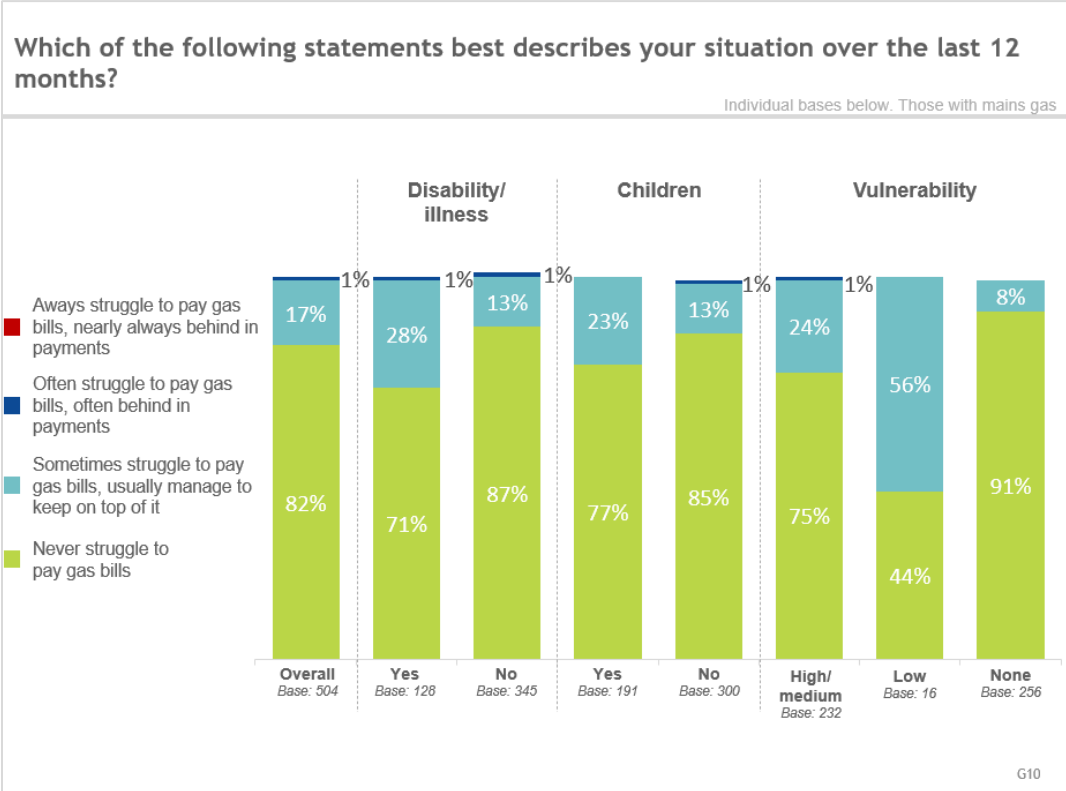
Respondents living in the most deprived areas (23%) were more likely than those in the least deprived areas (10%) to say that they sometimes struggle with their gas bills (see Figure 9.9).

Figure 9.9 Ability to pay gas bills by deprivation



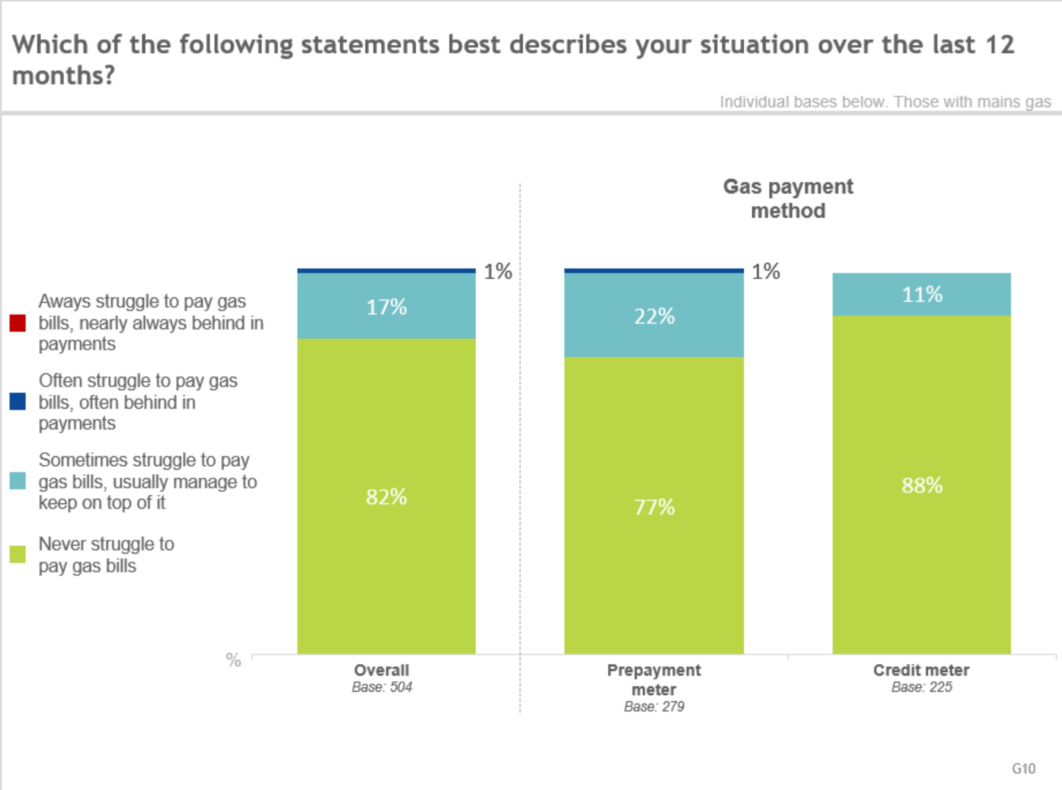
Respondents who have or live with someone who has a disability or illness (28%) were more likely to report that they sometimes struggle to pay their gas bill than those who do not have someone with a disability or illness in their household (13%). 23% of those who have children in their household said that they sometimes struggle, compared to 13% without children. Those who would be considered to be in the high or medium vulnerability group (24%) were also more likely to sometimes struggle when compared with those who are not vulnerable (8%) (see Figure 9.10).

Figure 9.10 Ability to pay gas bills by disability/illness, children and vulnerability



Gas customers on a prepayment meter (22%, compared to 11% with a credit meter) were again more likely to say they sometimes struggle to pay their bills (see Figure 9.11).

Figure 9.11 Ability to pay gas bills by gas payment method



Reasons for being without energy

Electricity

Almost all (98%) 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 9.12). Respondents with an electricity prepayment meter were more likely than credit customers to have gone without electricity in the past 12 months, although the proportion who said this never happened increased from 76% in 2024 to 84% in 2025. 12% had occasionally gone without electricity, 3% said this happened around once a month and 1% mentioned that they go without electricity most weeks (see Figure 9.13).

Figure 9.12 Incidence of going without electricity (no prepayment meter)

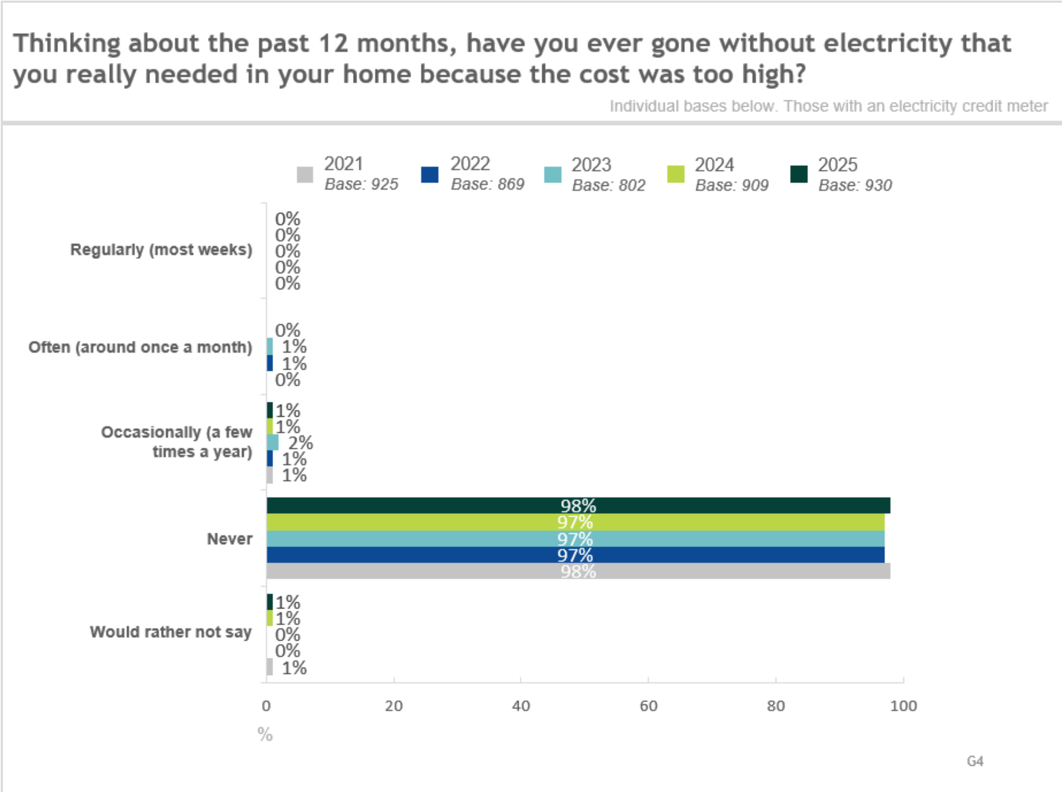
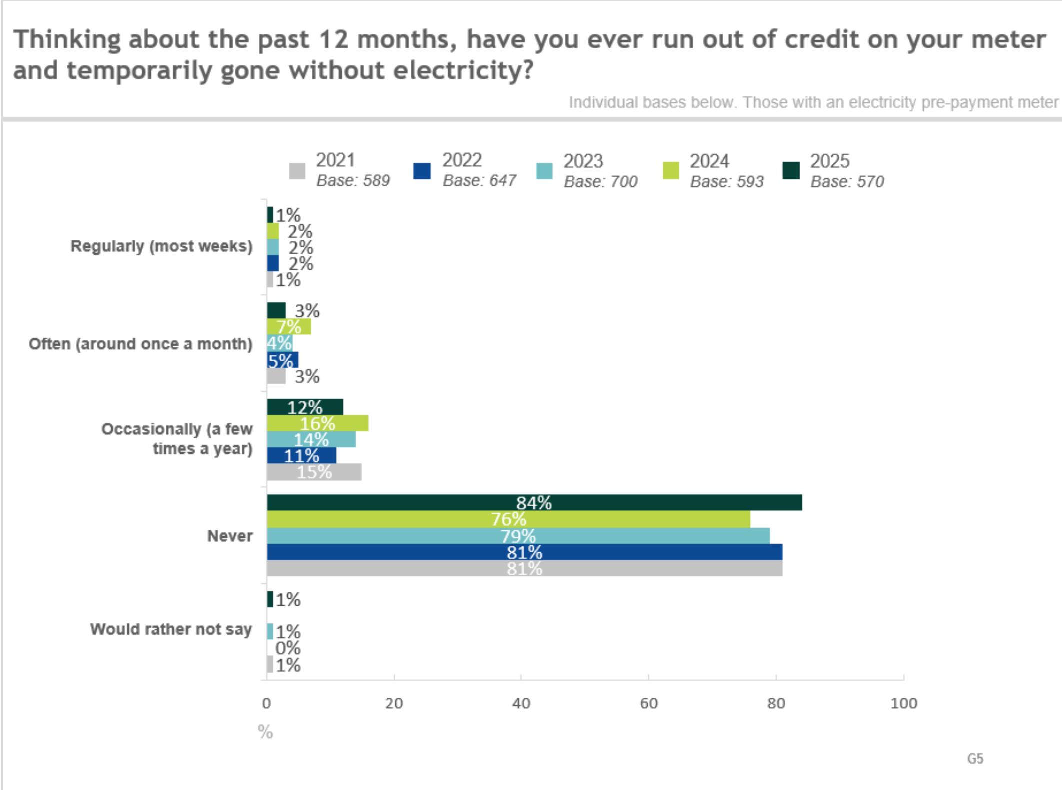
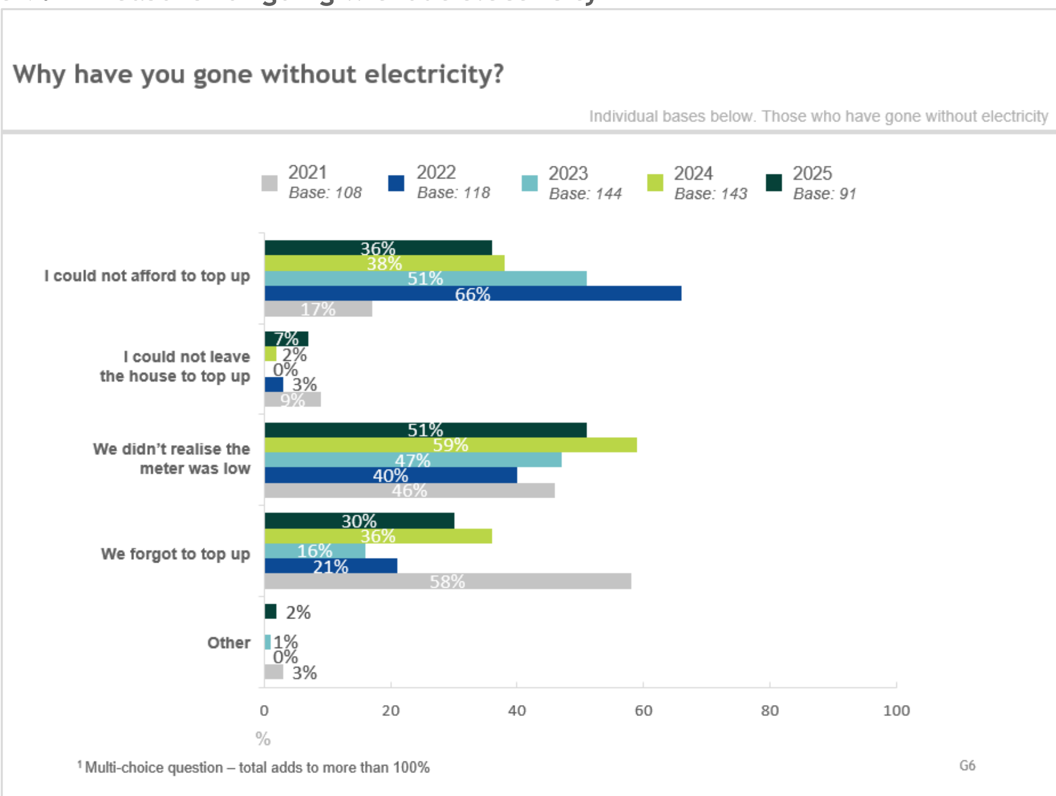


Figure 9.13 Incidence of going without electricity (prepayment meter)



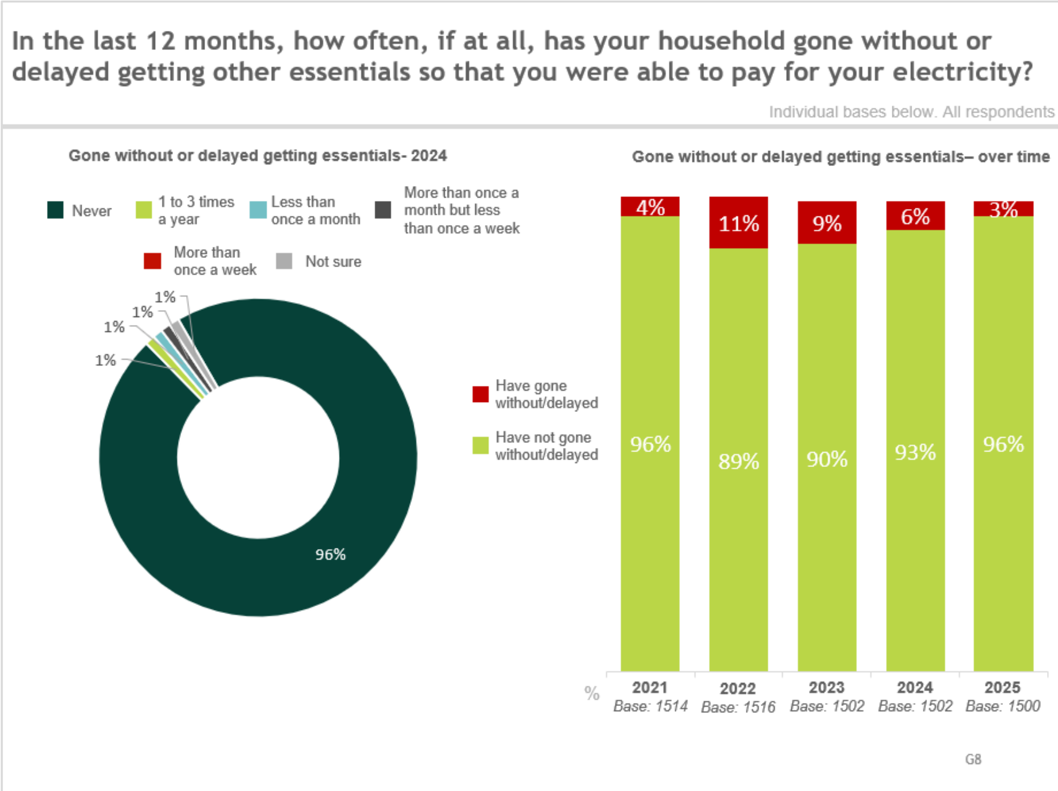
Of those respondents with a prepayment meter who had run out of credit on the meter and temporarily gone without electricity, 51% said that they did not realise the meter was low, while 36% stated that they could not afford to top up (see Figure 9.14).

Figure 9.14 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. The majority (96%) have never had to do this, increasing from 89% in 2022, 90% in 2023 and 93% in 2024 to be the same as 96% in 2021 (see Figure 9.15).

Figure 9.15 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 9.16 to 9.18):

- 5% 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 (10%) and who privately rent (7%) were more likely to say they had delayed getting essentials than those who own their home (1%);
- 8% 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 1% of those who do not have someone with a disability or illness in their household;
- Those who would be considered to be in the high or medium vulnerability group (5%) were more likely to have delayed getting essentials to pay for electricity than those who are not considered vulnerable (1%);
- Respondents who have a prepayment meter for electricity (6%) were more likely than credit customers (1%) to report they had gone without essentials in the past 12 months;
- 5% of electricity switchers stated they had gone without essentials, compared to 2% of non-switchers; and
- 23% 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 2% of those who had not self-disconnected from their supply in the last 12 months.

Figure 9.16 Incidence of delaying getting essentials to pay for electricity by SEG and tenure

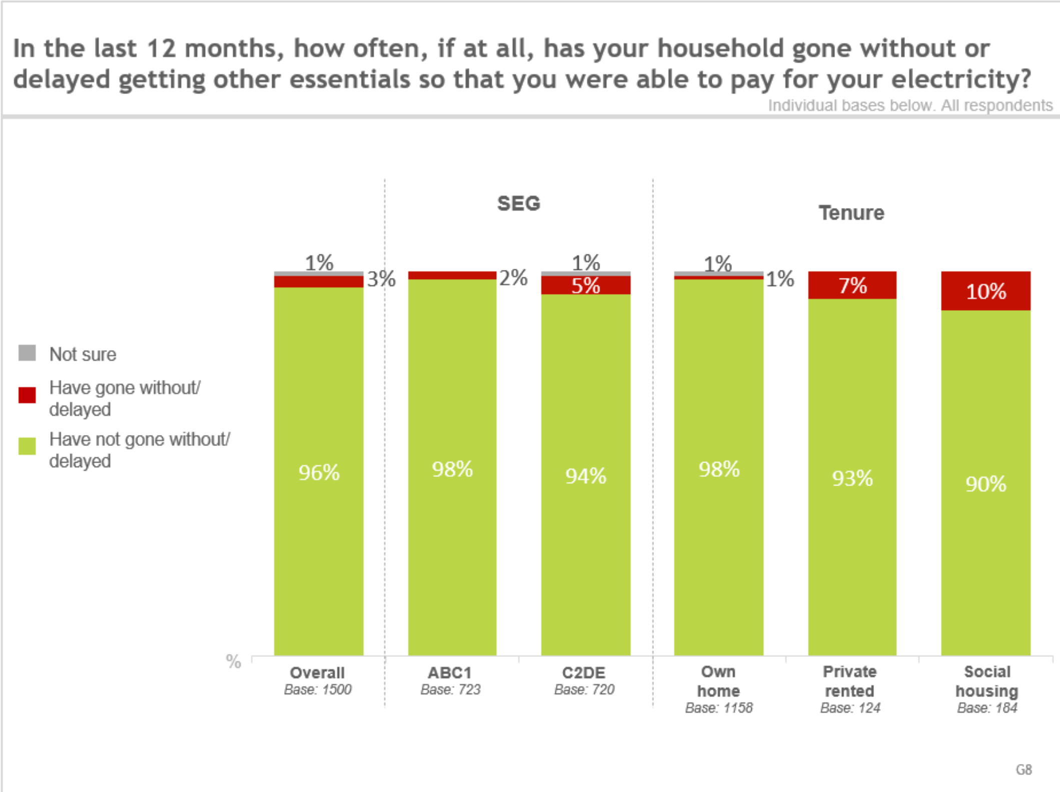


Figure 9.17 Incidence of delaying getting essentials to pay for electricity by disability/illness and vulnerability

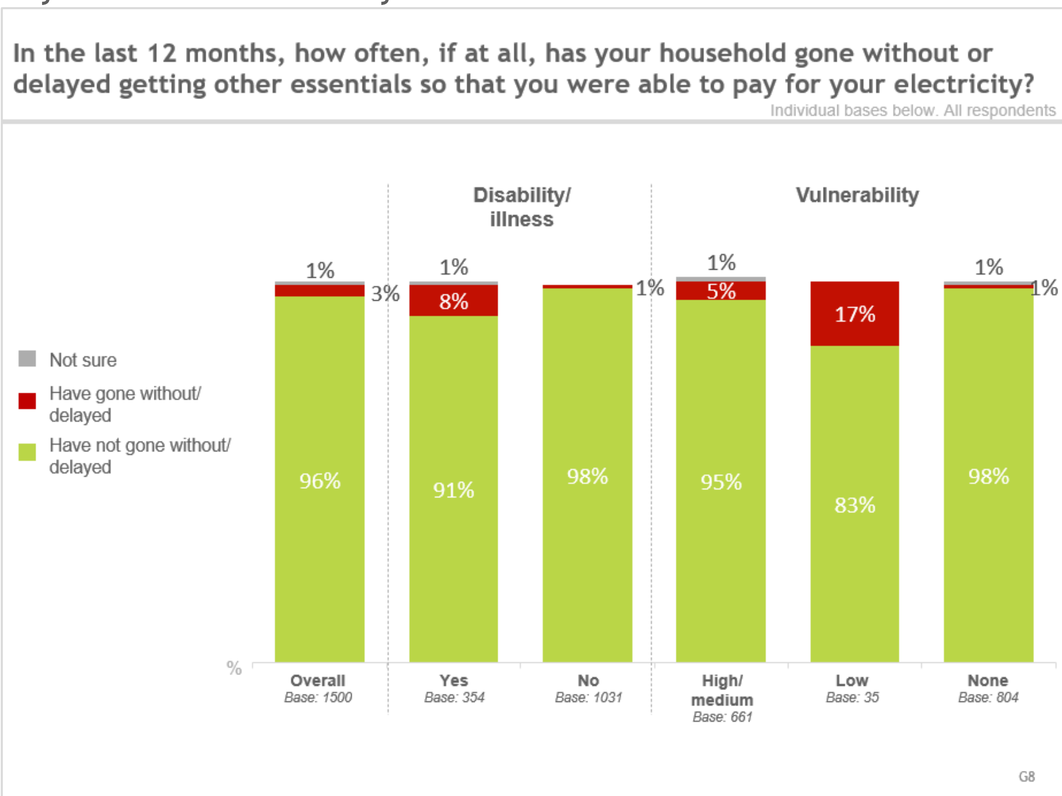
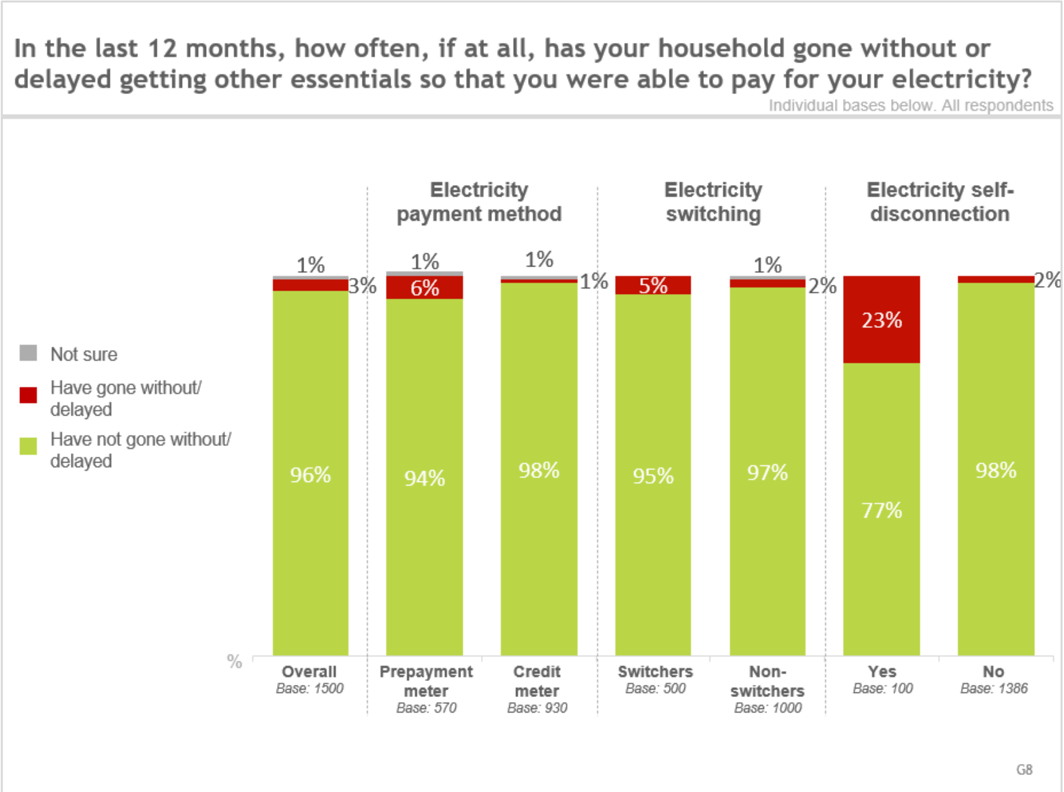
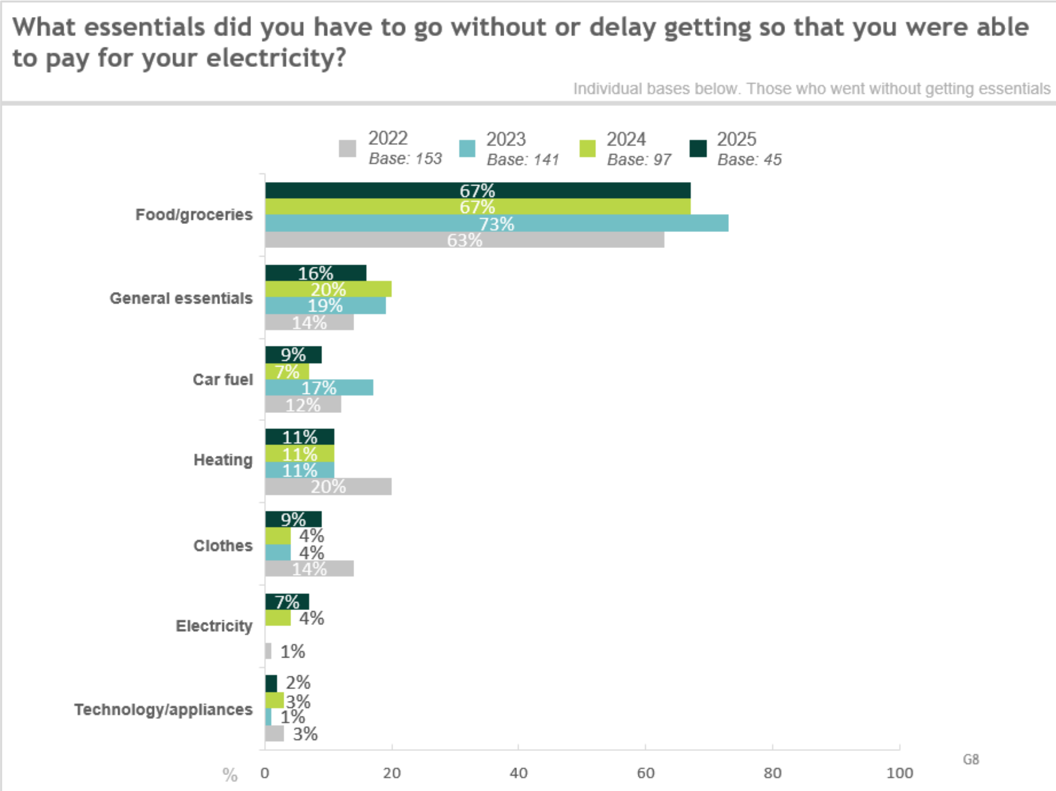


Figure 9.18 Incidence of delaying getting essentials to pay for electricity by electricity payment method, switching, and self-disconnection



Of those who had reported going without essentials, 67% said they had not bought food or groceries, while 16% did not pay for general essentials. A further 11% went without heating, and 9% went without car fuel and clothes (see Figure 9.19).

Figure 9.19 Essentials delayed or went without to pay for electricity



Gas

The majority (97%) of respondents on a credit meter for gas have not had to go without gas because the cost was too high (see Figure 9.20). Of those who have a gas prepayment meter, 17% reported having occasionally run out of credit, while 2% had done this often (see Figure 9.21).

Figure 9.20 Incidence of going without gas (no prepayment meter)

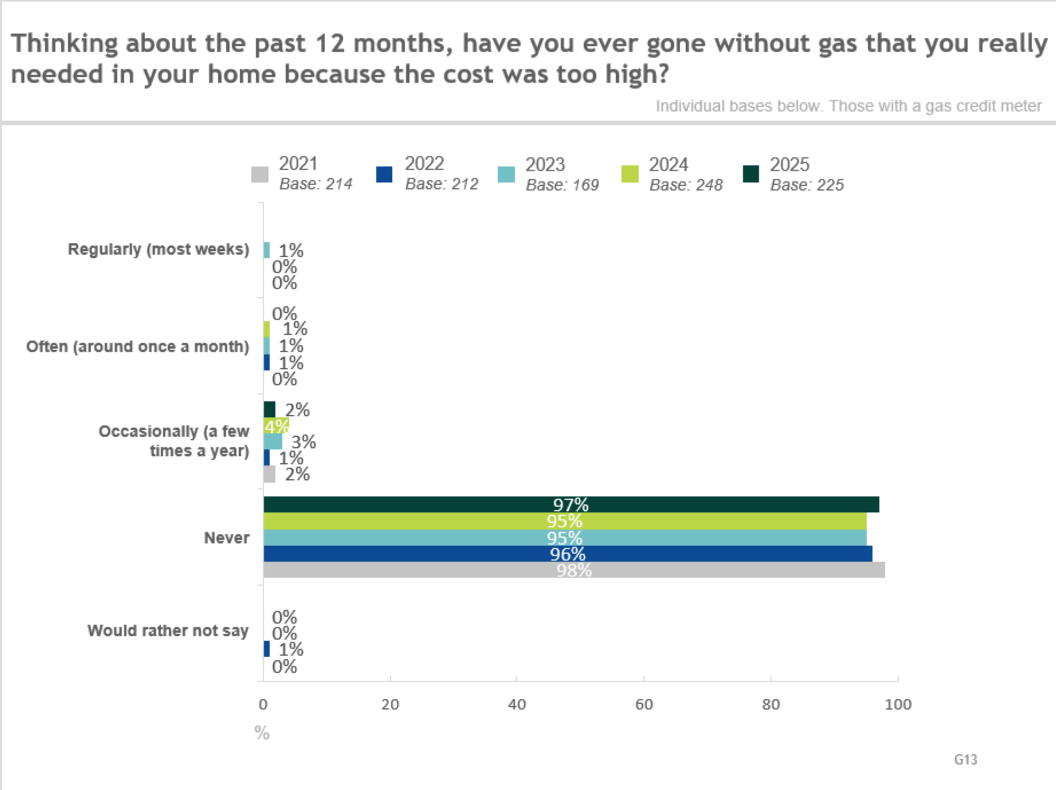
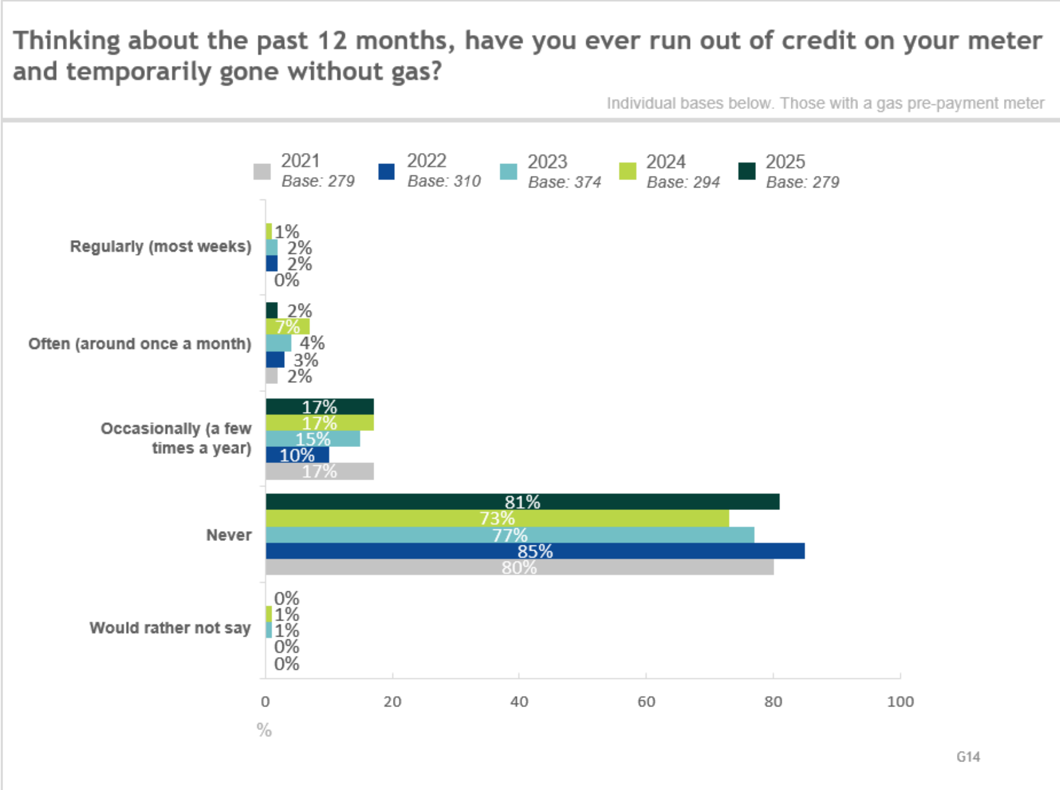
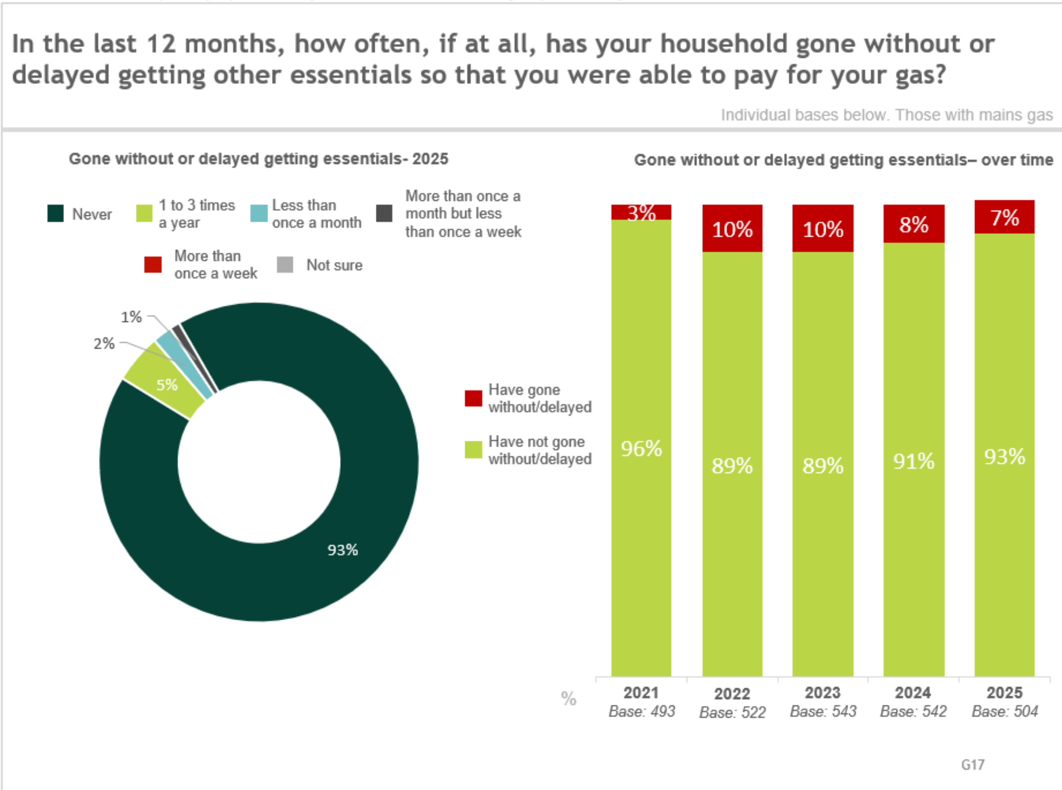


Figure 9.21 Incidence of going without gas (prepayment meter)



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. 7% confirmed that this was the case for them on at least one occasion in the last 12 months (see Figure 9.22).

Figure 9.22 Delaying getting essentials to pay for gas



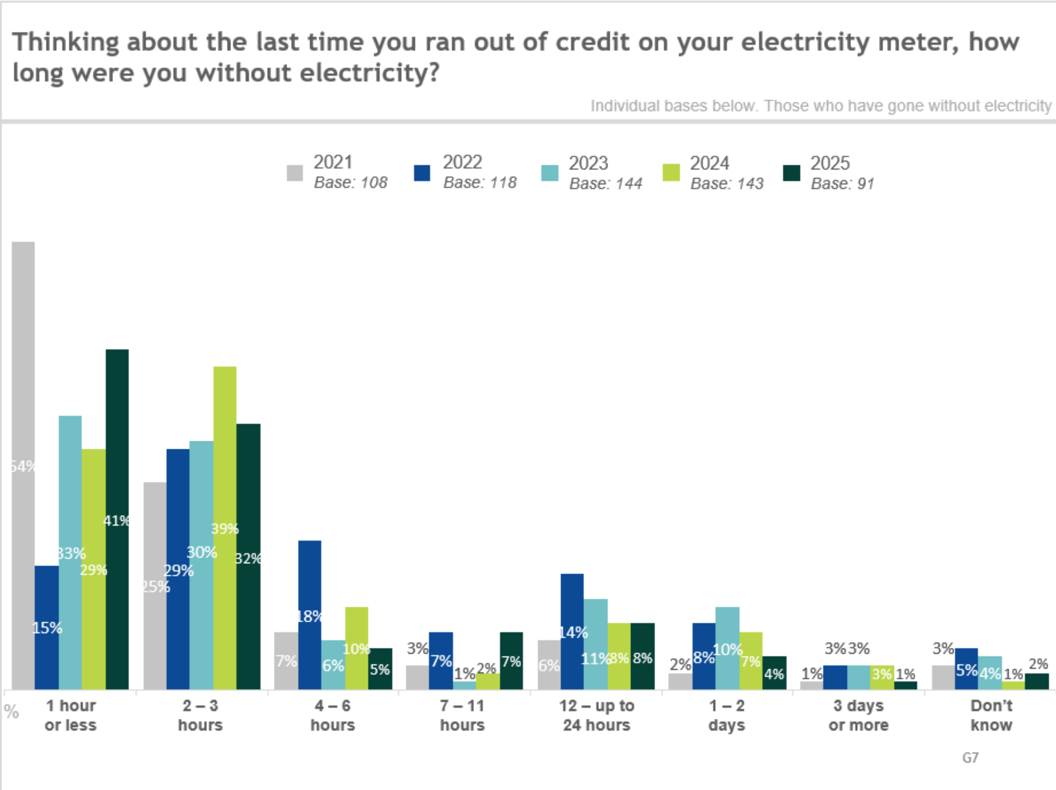
Length of time without energy

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

92% of respondents who ran out of credit on their electricity meter reported that their supply was restored on the same day, including 41% who were without their electricity for up to one hour. However, 5% stated that they were without electricity for longer than a day (see Figure 9.23).

Figure 9.23 Length of time without electricity



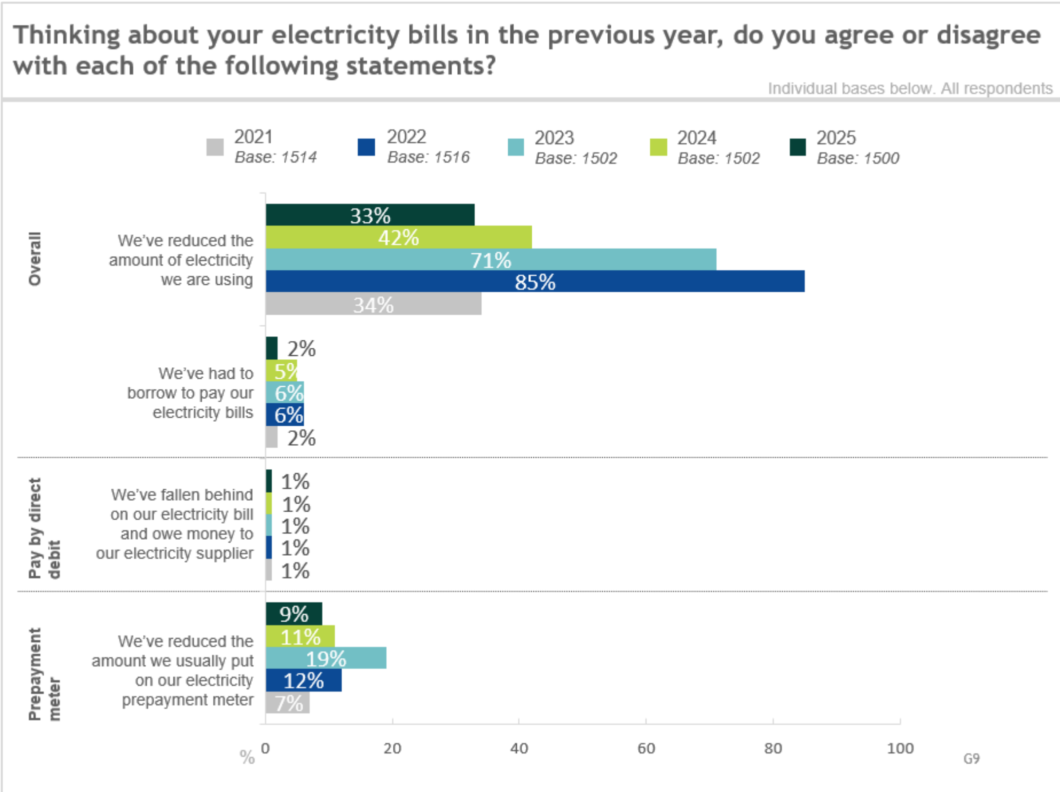
Methods to reduce spend on energy

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

One third (33%) of respondents reported that they had reduced the amount of electricity they were using in the previous year, representing a further decrease from 85% in 2022, 71% in 2023 and 42% in 2024, with the result now similar to 34% in 2021. 2% said they had to borrow to pay for electricity, down from 5% in 2024. 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. 9% of respondents with an electricity prepayment meter stated that they had reduced the amount they usually put on their meter (see Figure 9.24).

Figure 9.24 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 9.25 and 9.26):

- Respondents who have someone in their household with a disability or illness (41%) were more likely to have reduced their electricity usage than those who do not have someone with a disability or illness in the household (32%);
- Those in the high or medium vulnerability group (39%) were more likely to report that they reduced their electricity usage than those who are not considered vulnerable (27%);
- Confident internet users (32%) were more likely to say they had reduced their electricity usage than those who do not consider themselves to be confident users (26%);
- Electricity switchers (38%) were more likely than non-switchers (30%) to have reduced their electricity usage; and
- Over half (55%) of those who had self-disconnected from their electricity supply said they had reduced their electricity usage, compared to one third (32%) who had not self-disconnected.

Figure 9.25 Reducing electricity usage by disability and illness, vulnerability, and confidence using the internet

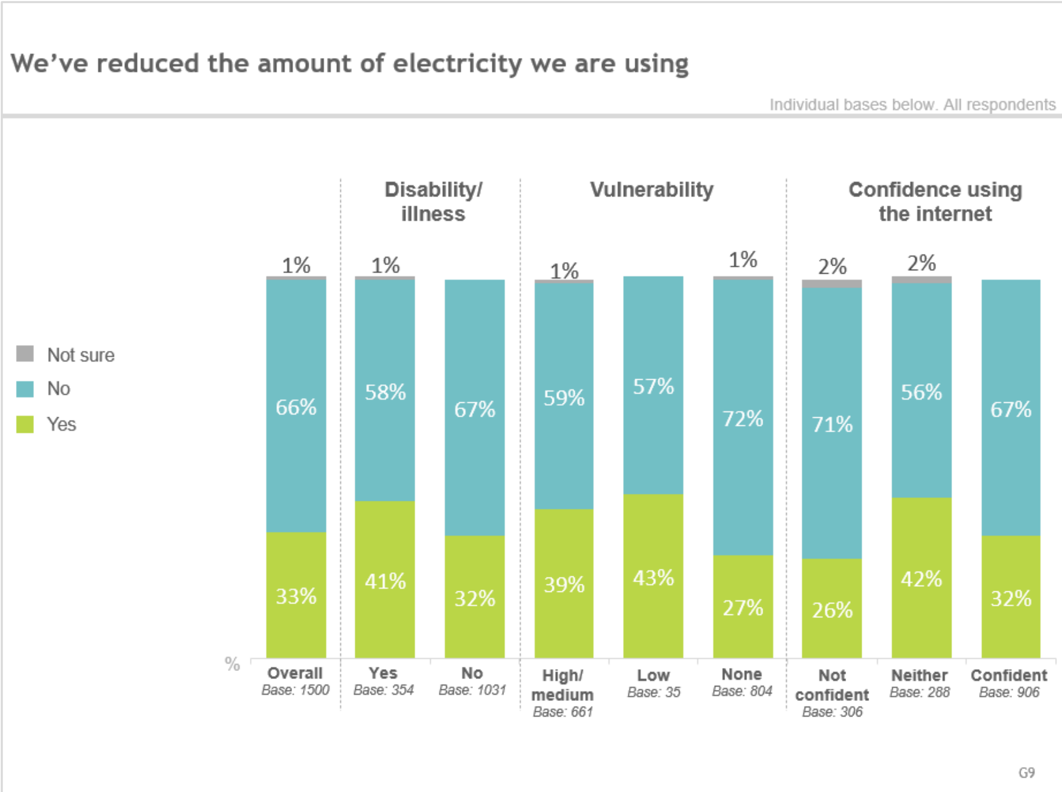
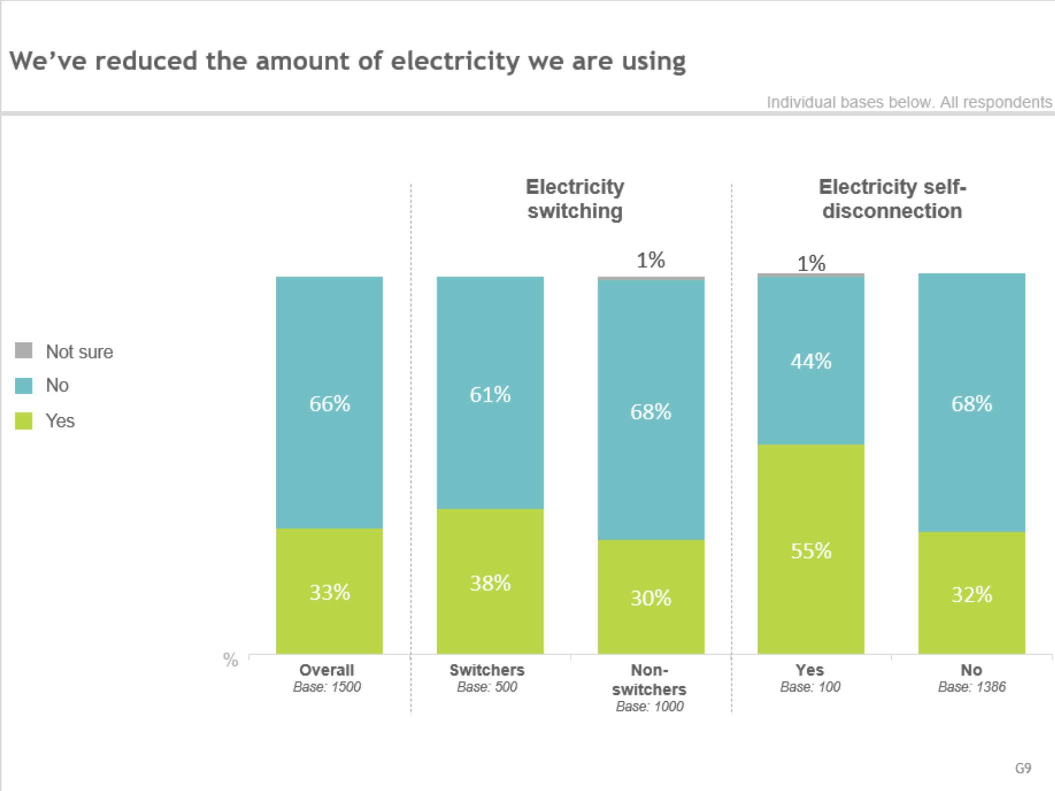


Figure 9.26 Reducing electricity usage by electricity switching and electricity self-disconnection



Similar patterns were observed amongst those who had to borrow money to pay their electricity bills (see Figures 9.27 to 9.30):

- Those in the C2DE group (4%) were more likely than those in the ABC1 group (1%) to report having borrowed money to pay their electricity bills;
- Respondents who live in social housing (10%) and who privately rent (6%) were more likely than those who own their home (1%) to say they had borrowed money to cover their electricity bills;
- Those living in the most deprived areas (6%) were more likely to state they had borrowed money for their electricity bills than those in the least deprived areas (less than 1%);
- 5% of those who have or live with someone who has a disability or illness had borrowed money to pay their electricity bills, compared to 2% who do not have or live with someone who has a disability or illness;
- Those who have children in their household (5%) were more likely than those without children (1%) to say they had borrowed money for their electricity bills;
- 4% of those in the high or medium vulnerability group said they had to borrow to pay their bills, compared to 1% who are not considered to be vulnerable;
- Respondents who have a prepayment meter for electricity (5%) were more likely to report borrowing money for their electricity bills than those on a credit meter (1%);
- 16% of respondents who had self-disconnected from their electricity supply said they had to borrow money to cover their electricity bills, compared to 1% who had not self-disconnected.

Figure 9.27 Borrowing money to pay electricity bills by socioeconomic group and tenure

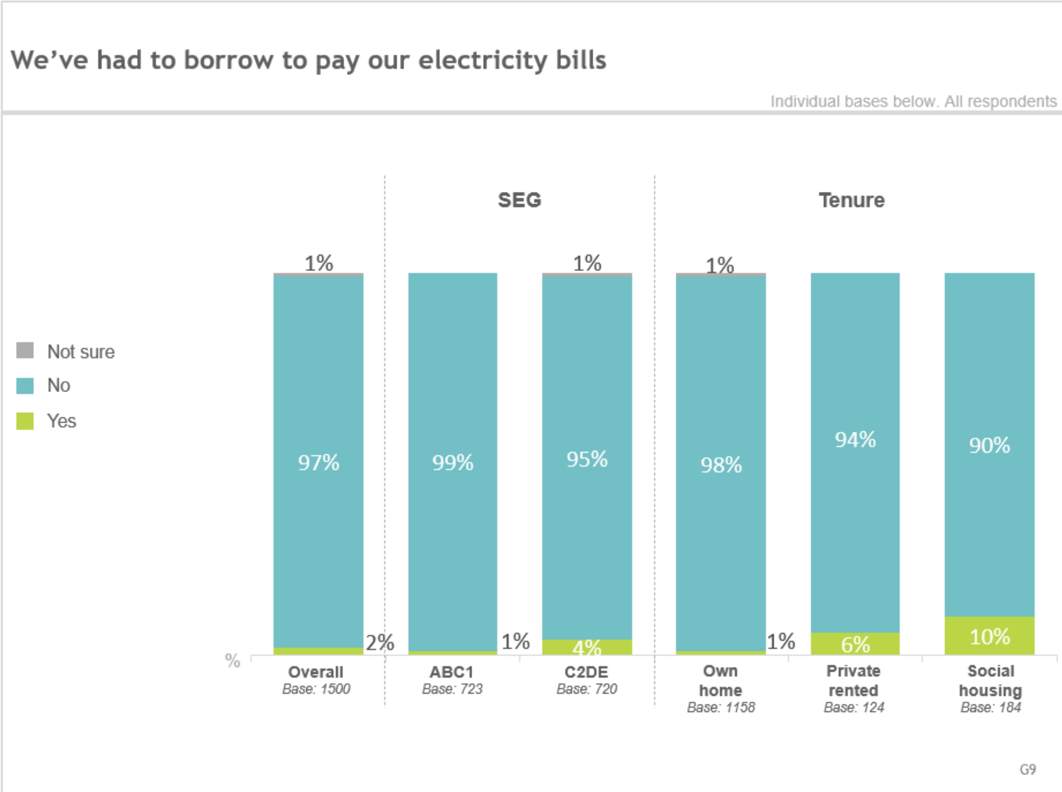


Figure 9.28 Borrowing money to pay electricity bills by deprivation

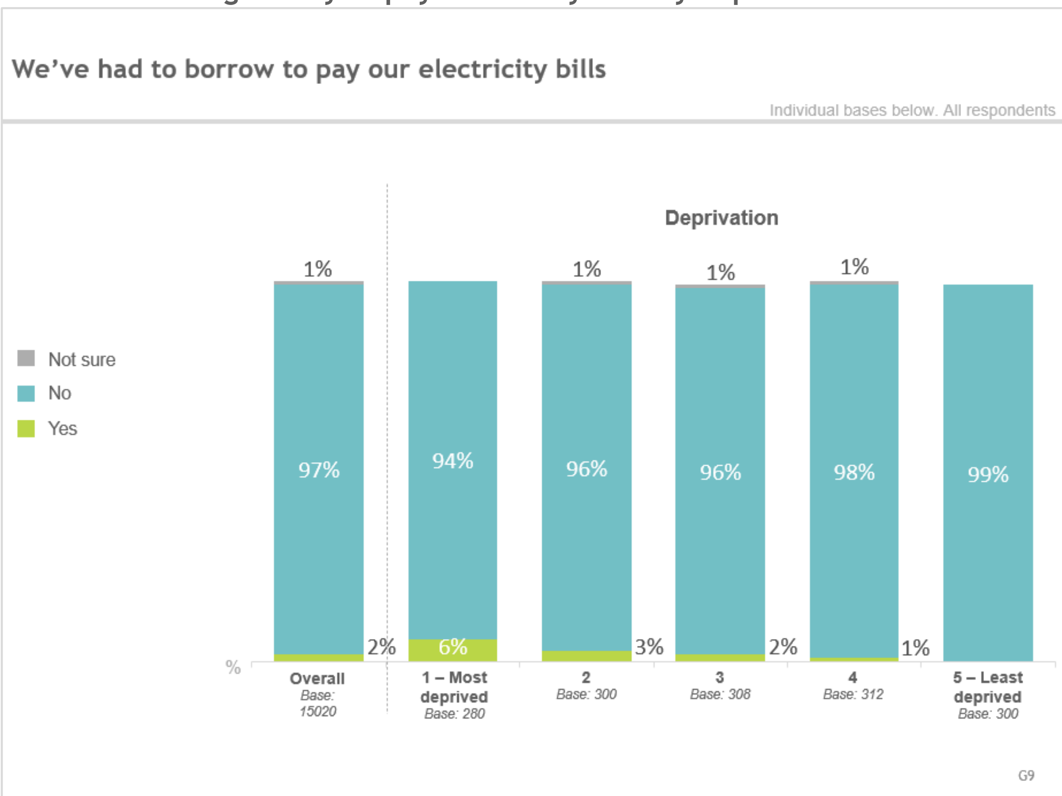


Figure 9.29 Borrowing money to pay electricity bills by disability/illness, children, and vulnerability

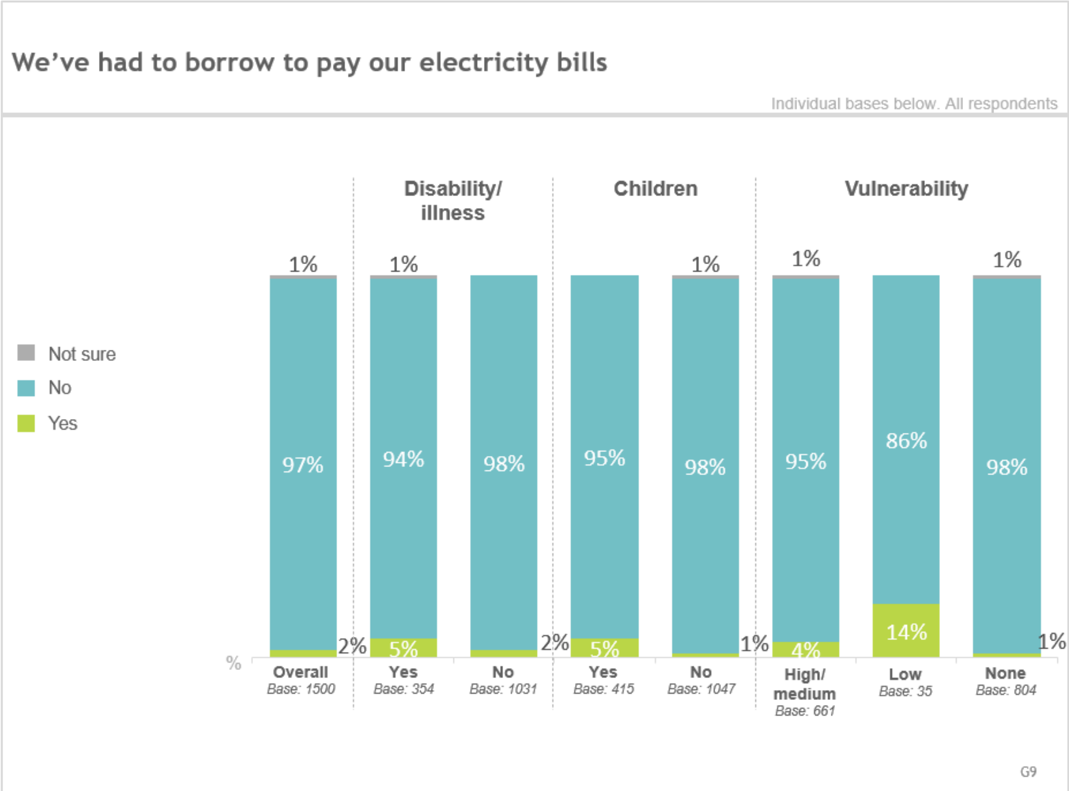
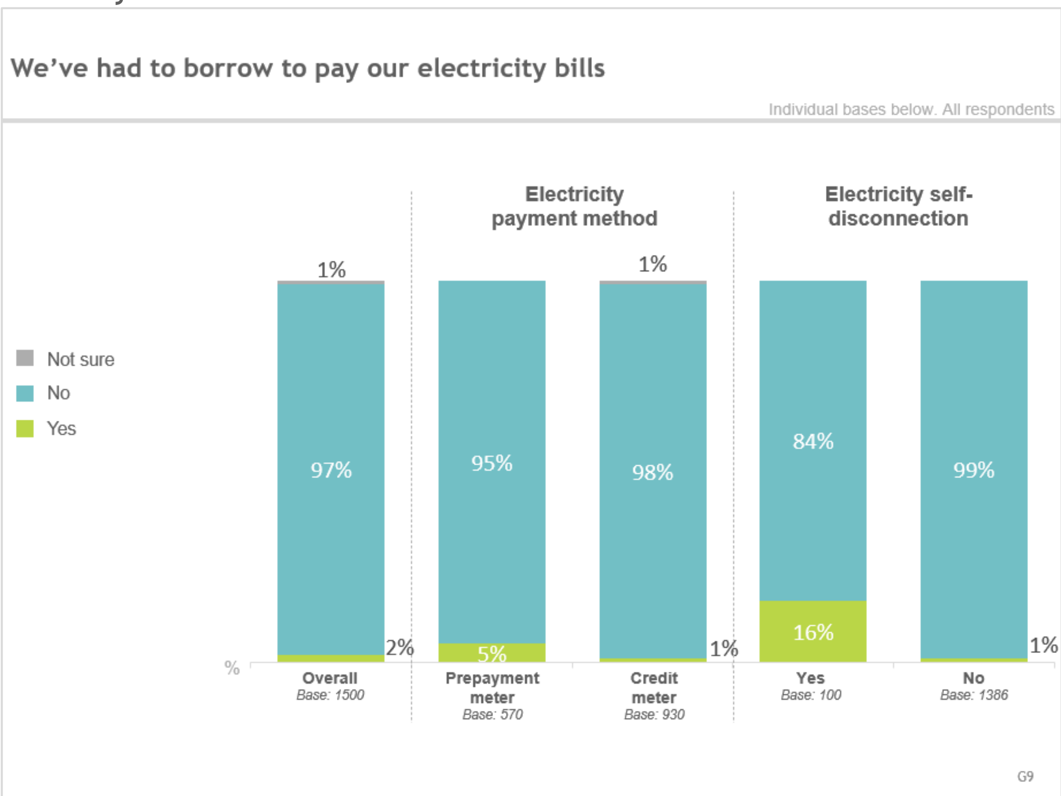


Figure 9.30 Borrowing money to pay electricity bills by electricity payment method, and electricity self-disconnection

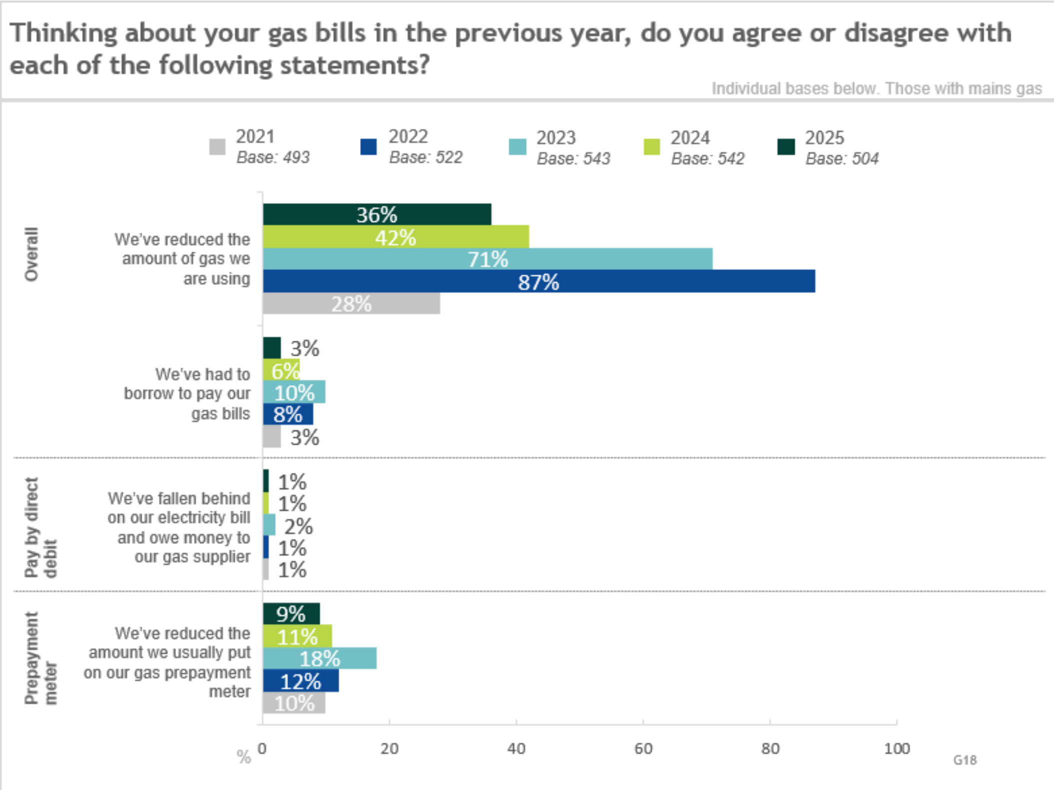


Gas

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).

36% of gas customers stated that they had reduced the amount of gas they were using last year, decreasing further from 87% in 2022, 71% in 2023 and 42% in 2024. 3% reported that they had to borrow to cover their gas bills, down from 6% in 2024. 1% of customers with direct debit for their gas bills said they owe money to their supplier. 9% of those with a gas prepayment meter revealed that they have reduced the amount they usually put on their meter (see Figure 9.31).

Figure 9.31 Methods to reduce spend on gas bill



The following significant differences were observed (see Figures 9.32 and 9.33):

- Respondents aged 45 to 64 (43%) were more likely than those aged 18 to 34 (29%) and 65 and over (28%) to have reduced their gas usage;
- Gas customers in the C2DE group (41%) were more likely to report reducing their gas usage than those in the ABC1 group (32%);
- 48% of those who have someone in their household with a disability or illness stated they had reduced their gas usage, in comparison with 33% without someone in their household with a disability or illness;
- Those in the high and medium vulnerability group (41%) were more likely to say they had reduced their gas usage than those not considered to be vulnerable (30%).

Figure 9.32 Reducing gas usage by demographics

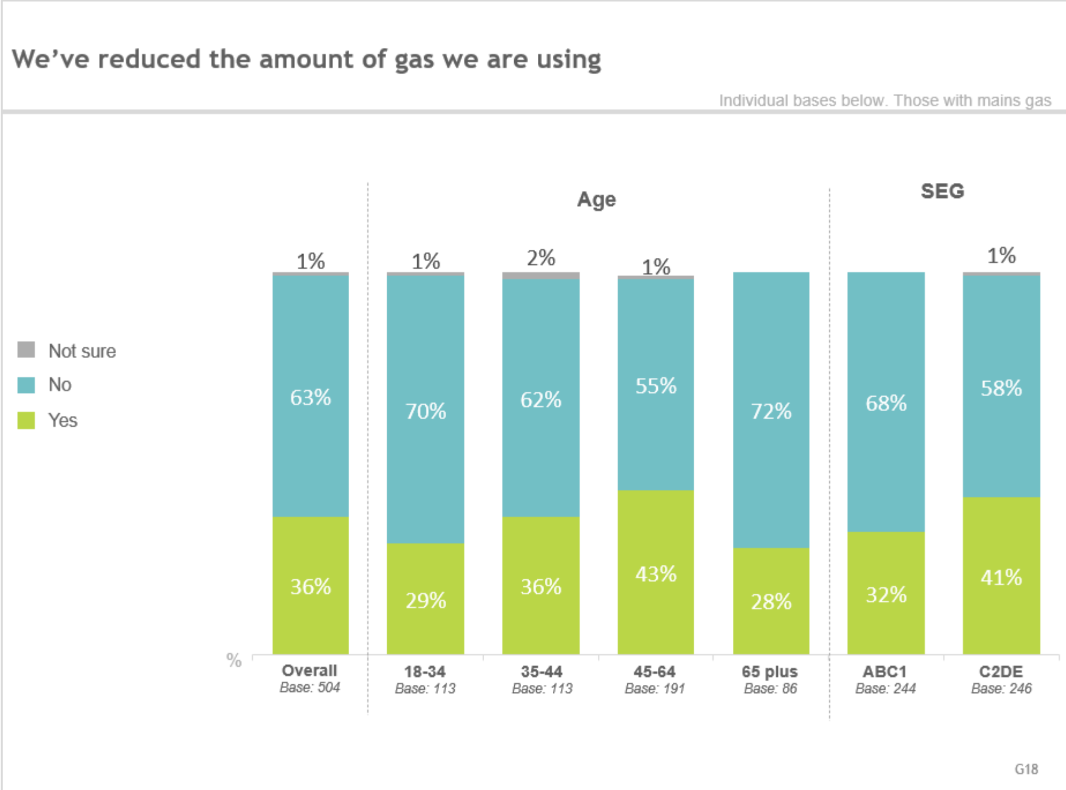
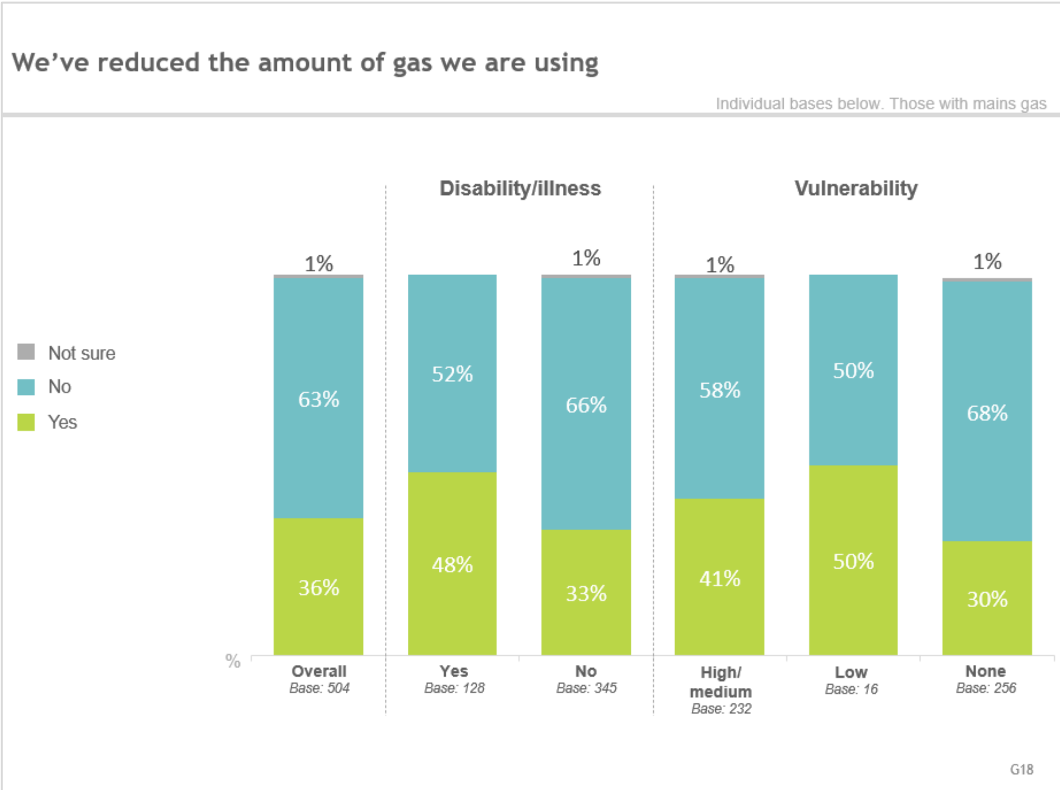


Figure 9.33 Reducing gas usage by disability/illness and vulnerability



Subgroup analysis also revealed the following differences between those who had to borrow money to pay for their gas bills (see Figures 3.34 and 3.35):

- Those in the C2DE group (6%) were more likely than those in the ABC1 group (1%) to say they had borrowed money for their gas bills;
- Respondents living in the most deprived areas (7%) were more likely than those living in the least deprived areas (less than 1%) to state that they had to borrow to pay for gas;
- Respondents who have a prepayment meter for gas (5%) were more likely to report they had to borrow to pay their gas bills than those on a credit meter (1%).

Figure 9.35 Borrowing money to pay gas bills by socioeconomic group and deprivation

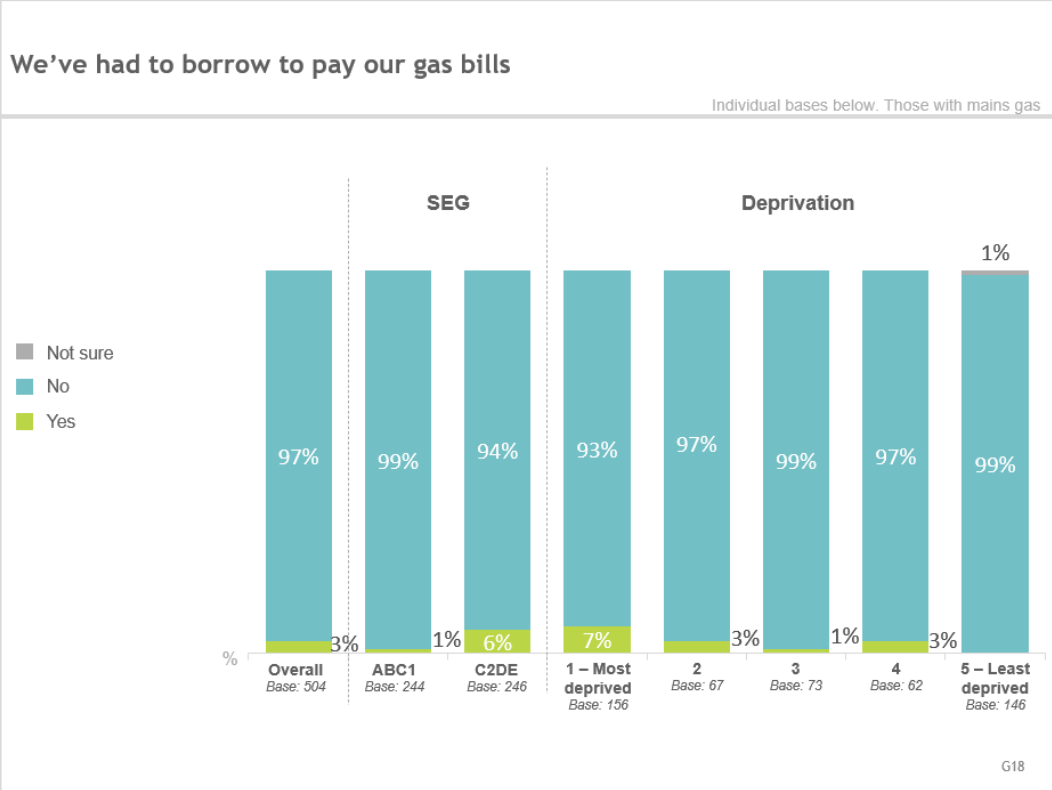
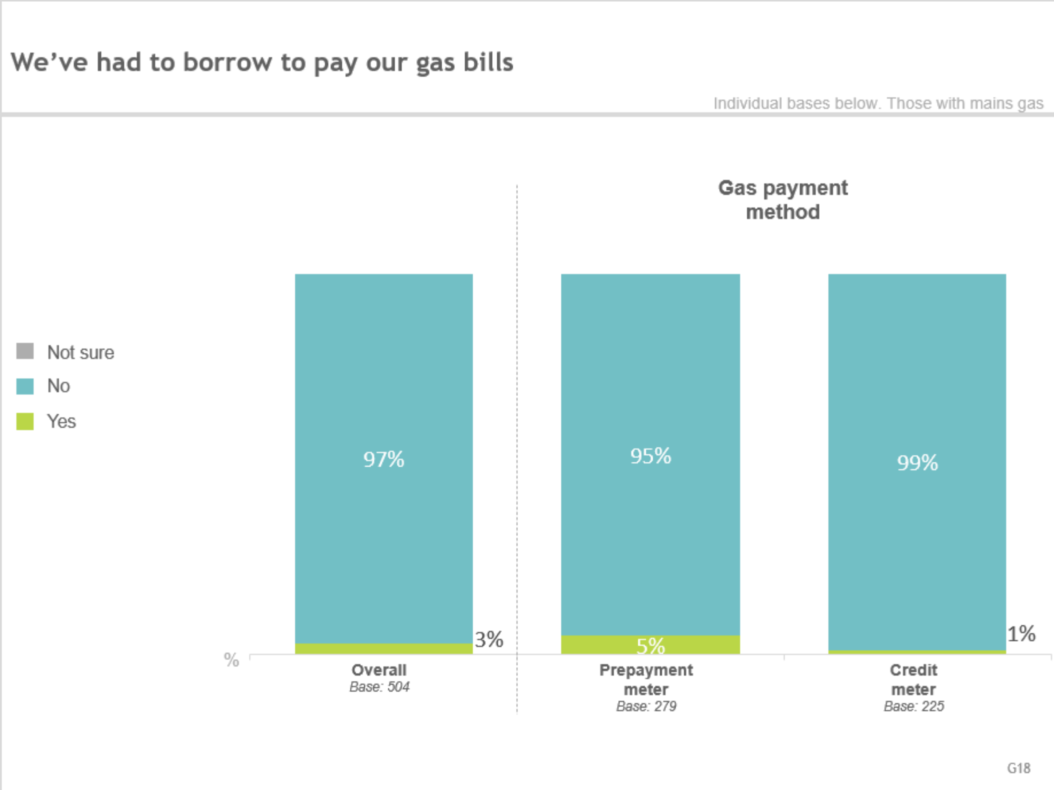


Figure 9.35 Borrowing money to pay gas bills by gas payment method



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

10. Consumer protections

In this section we determine the level of awareness 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.

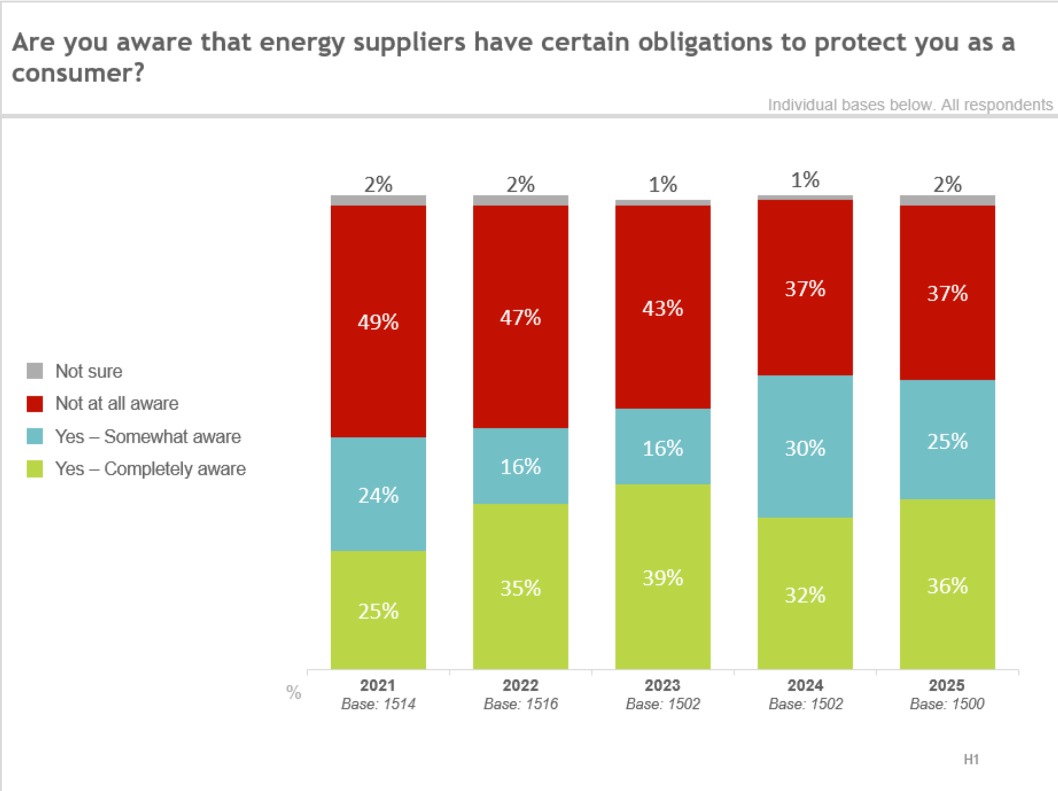
Key findings

- Awareness of consumer protections has remained the same from the previous Tracker (61% in 2024 and in 2025).
    - However, the proportion who are completely aware has increased from 32% in the previous Tracker to 36% in 2025.
    - Two thirds (65%) of those who consider themselves to be confident internet users said they were aware of these obligations, compared to half (51%) of those who are not confident internet users.
- Four in five (80%) 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 76% in 2024.
- Respondents who are not confident internet users (75%) were less likely than confident users (82%) to know how to go about making a complaint if these obligations are not met.

Three in five (61%) domestic consumers were aware that their energy supplier has an obligation to protect them as a consumer, including 36% who were completely aware of this. However, 37% were not aware of the obligation (see Figure 10.1).

Electricity (56%) customers who have a prepayment meter were less likely to be aware of these obligations than those with a credit meter for electricity (64%).

Figure 10.1 Awareness of consumer protection obligations



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

- Two thirds (66%) of respondents in the ABC1 group were aware of these obligations, compared to 58% of those in the C2DE group;
- Respondents who own their home (64%) were more likely to say they were aware than those who privately rent (52%) and who live in social housing (49%);
- Those living in the least deprived areas (66%) were more likely to report being aware than those in the most deprived areas (56%);
- Respondents who have access to the internet (62%) and 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 without access (48%) and who are not confident users (51%);
- Electricity switchers (66%) 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 (59%) and those who had self-disconnected (38%).

Figure 10.2 Awareness of consumer protection obligations by socioeconomic group and tenure

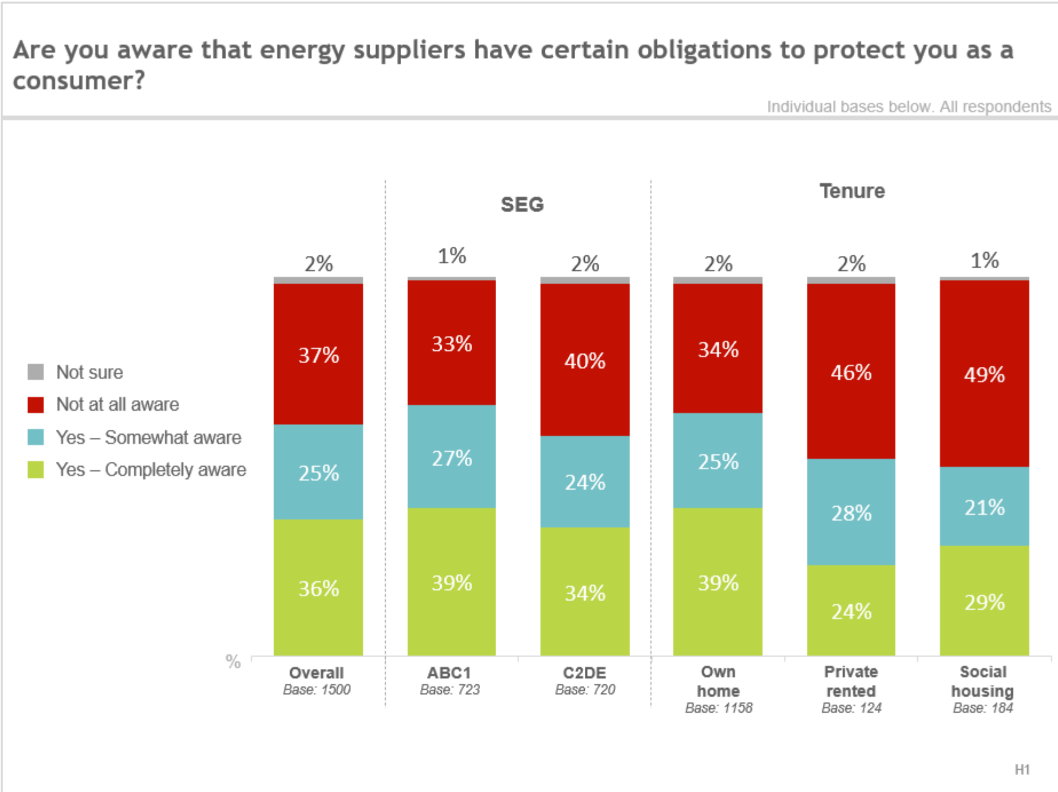


Figure 10.3 Awareness of consumer protection obligations by deprivation

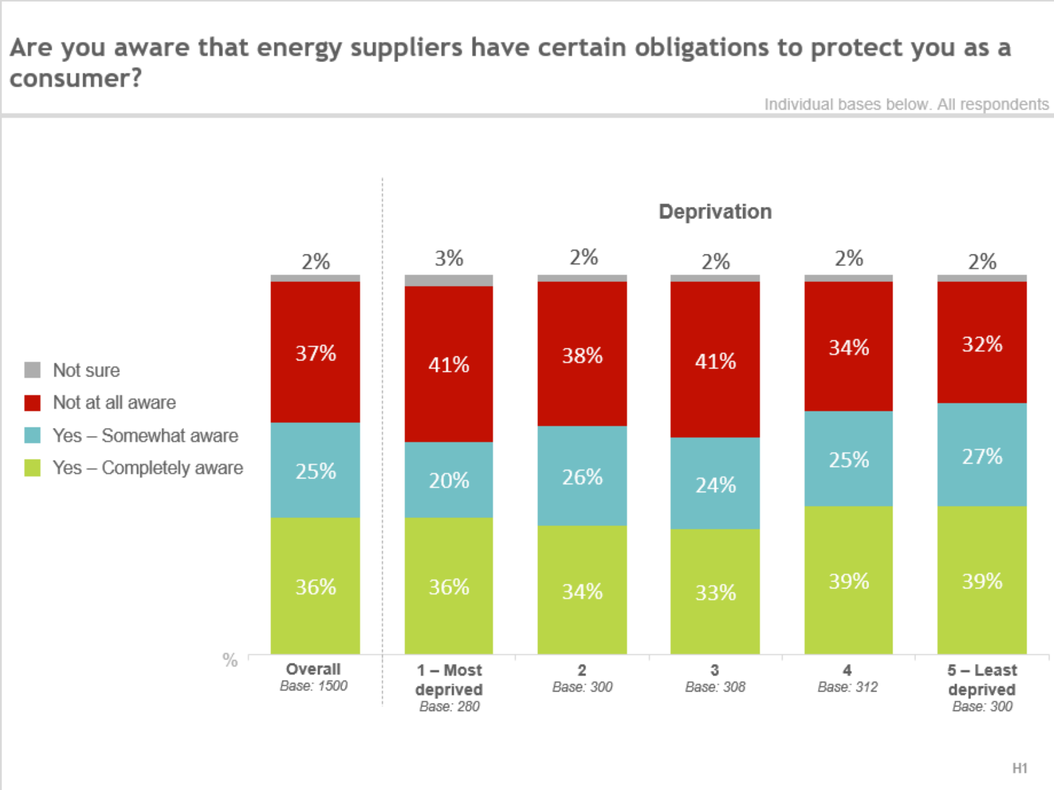


Figure 10.4 Awareness of consumer protection obligations by internet access and confidence using the internet

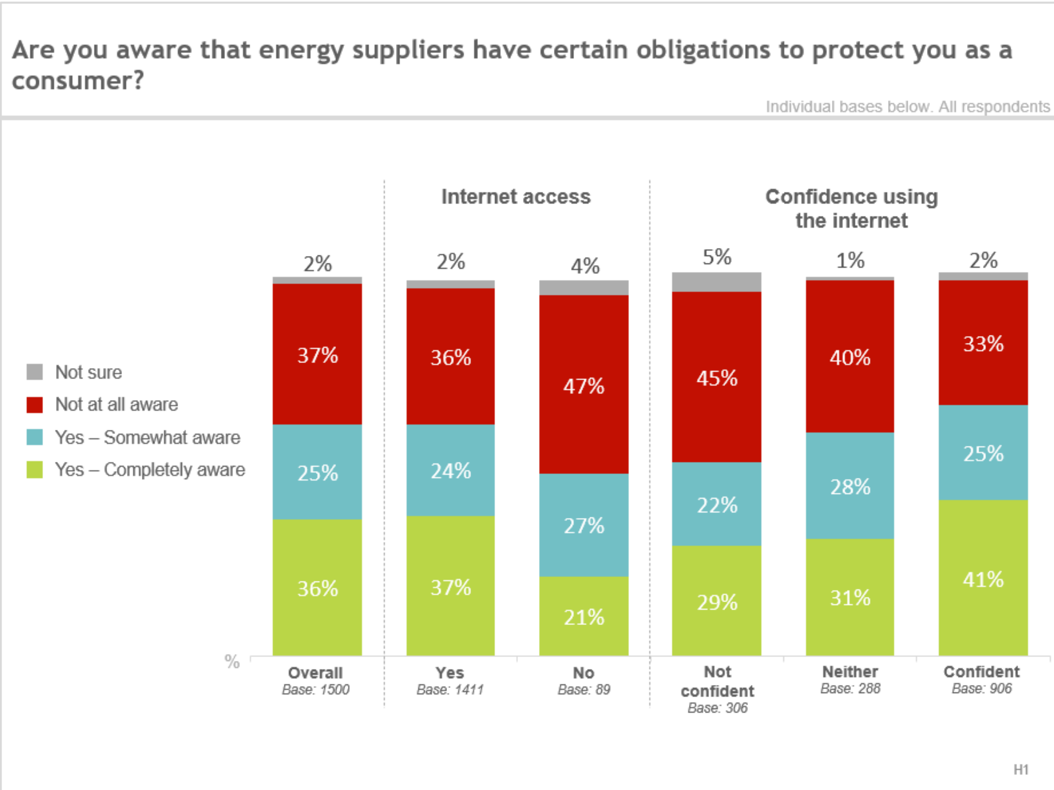
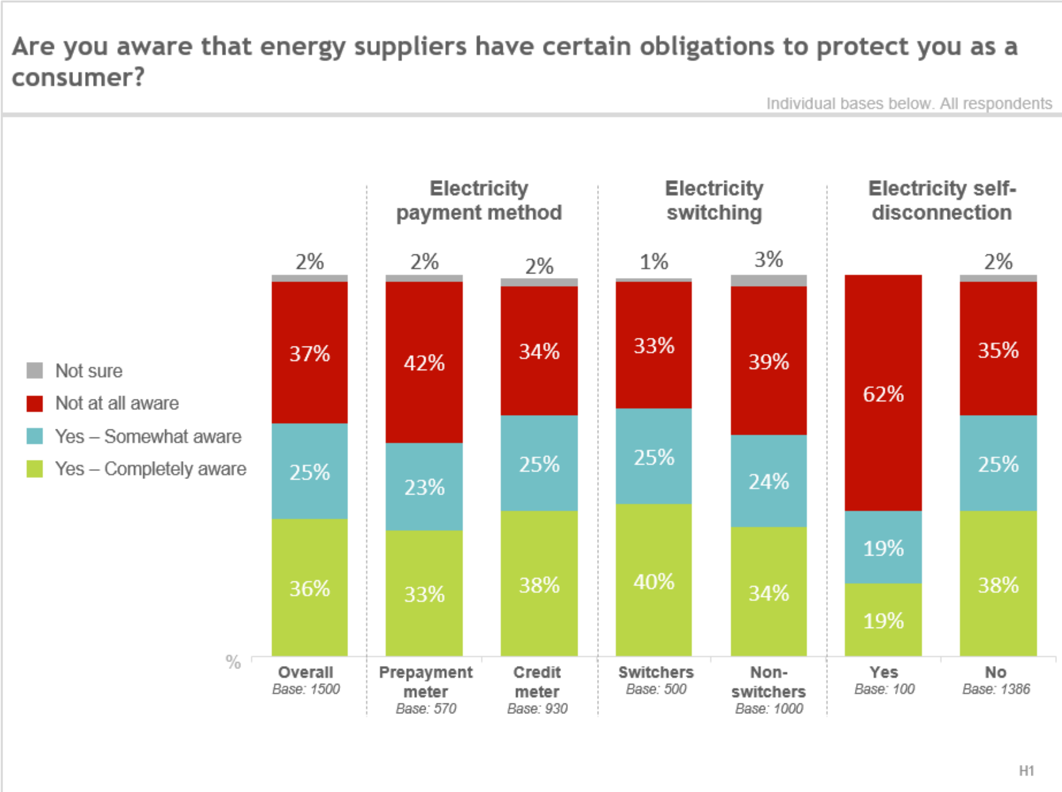


Figure 10.5 Awareness of consumer protection obligations by electricity payment method, electricity switching and electricity self-disconnection



Of those who were aware, four in five (80%) stated that they would know how to make a complaint if they felt their supplier was not meeting these obligations, increasing from 76% in 2024. One quarter (23%) of those who do not consider themselves to be confident internet users said they would not know how to go about making a complaint, compared to 15% who consider themselves to be confident internet users, although it should be noted that no significant differences were observed between those who said they would know how to make a complaint (see Figure 10.6 and Table 10.1).

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

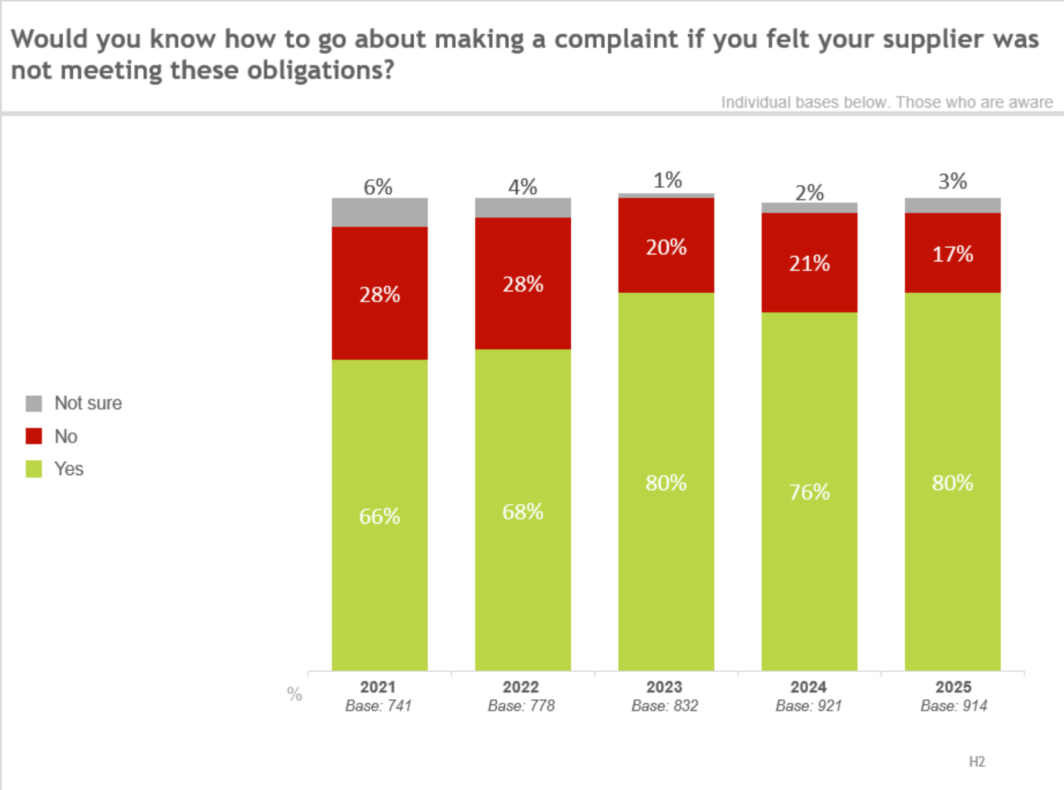


Table 10.2 Awareness of how to make a complaint when obligations are not met by confidence using the internet

		Yes	No	Not sure	*Total*
Overall	All *Base: 914*	80%	17%	3%	*100%*
Confidence using the internet	Not confident *Base: 155*	75%	23%	3%	*100%*
	Neither *Base: 169*	76%	22%	2%	*100%*
	Confident *Base: 590*	82%	15%	3%	*100%*

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

11. Support services

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

- Awareness of support services;
- Use of support services;
- 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 22% who knew a bit about the services offered.
  - This compares to 47% who were aware overall and 36% who knew about the services offered in the 2024 Tracker.
  - Respondents who are not confident internet users (40%) were least likely to be aware of the support services.
  - 3% of all participants were signed up to or had utilised some of the support services offered by energy companies.
- The majority (94%) of those in the high or medium vulnerability group had not signed up to utilise any of the support services offered by energy companies. 90% who have or live with someone who has a disability or illness had not signed up for any of these support services.
- 30% were aware of the services for vulnerable consumers that NI Water provides, an increase from 20% in 2024.

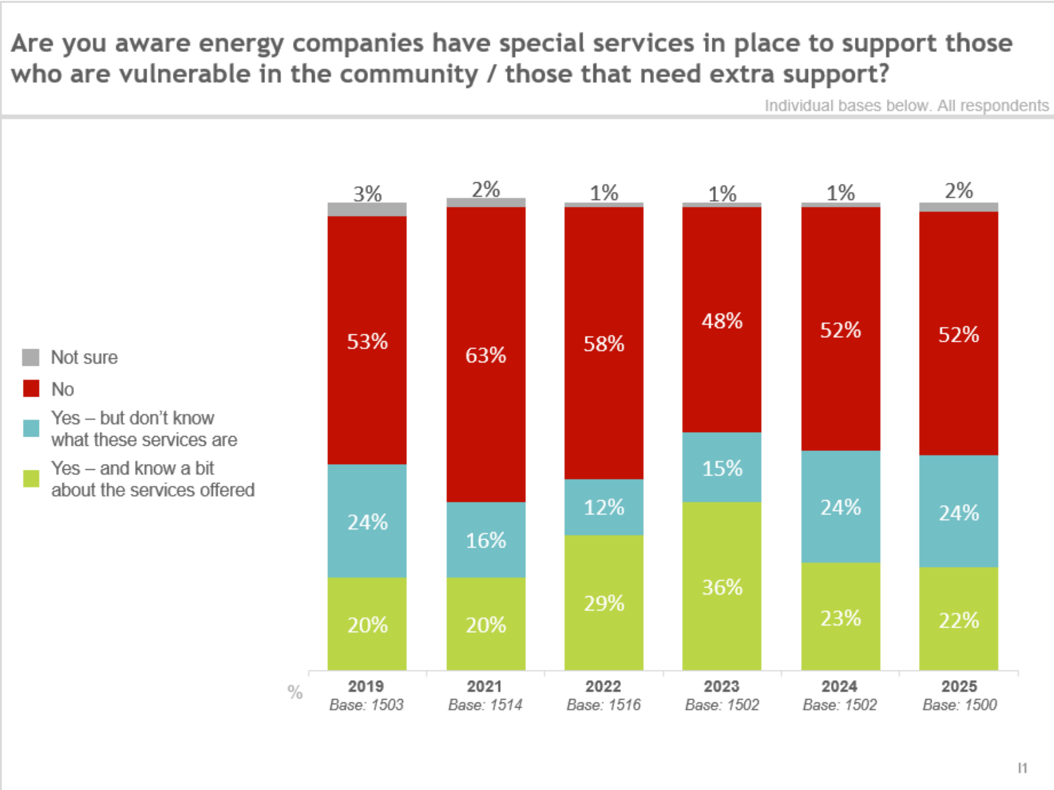
Energy companies

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 22% knowing something about what type of services are offered. This is similar to 47% who were at least aware of the services and 23% who knew something about the services in the 2024 Tracker. 52% were not aware of these services, the same proportion as in the 2024 Tracker.

Respondents who have someone in their household with a disability or illness (27%) were more likely to say they know a bit about the services offered than those without someone in their household with a disability or illness (21%). However, there were no significant differences observed between those in the high and medium vulnerability group and those not considered to be 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):

- 52% of those in the ABC1 group were aware, compared 43% of those in the C2DE group;
- Those living in the most deprived areas (43%) were less likely to be aware of these services than those in the least deprived areas (53%);
- Almost two in five (57%) of those who do not consider themselves to be confident internet users had not heard of these services, compared to half (49%) of those who are confident users;
- Respondents who have a prepayment meter for electricity (19%) were less likely to know about the services than those on a credit meter (24%);

- 44% 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 51% of those who had switched; and
- 48% of respondents who have not self-disconnected from their electricity indicated that they had heard of these services, compared to 37% of those who have self-disconnected.

Figure 11.2 Awareness of support services offered by energy companies by socioeconomic group and deprivation

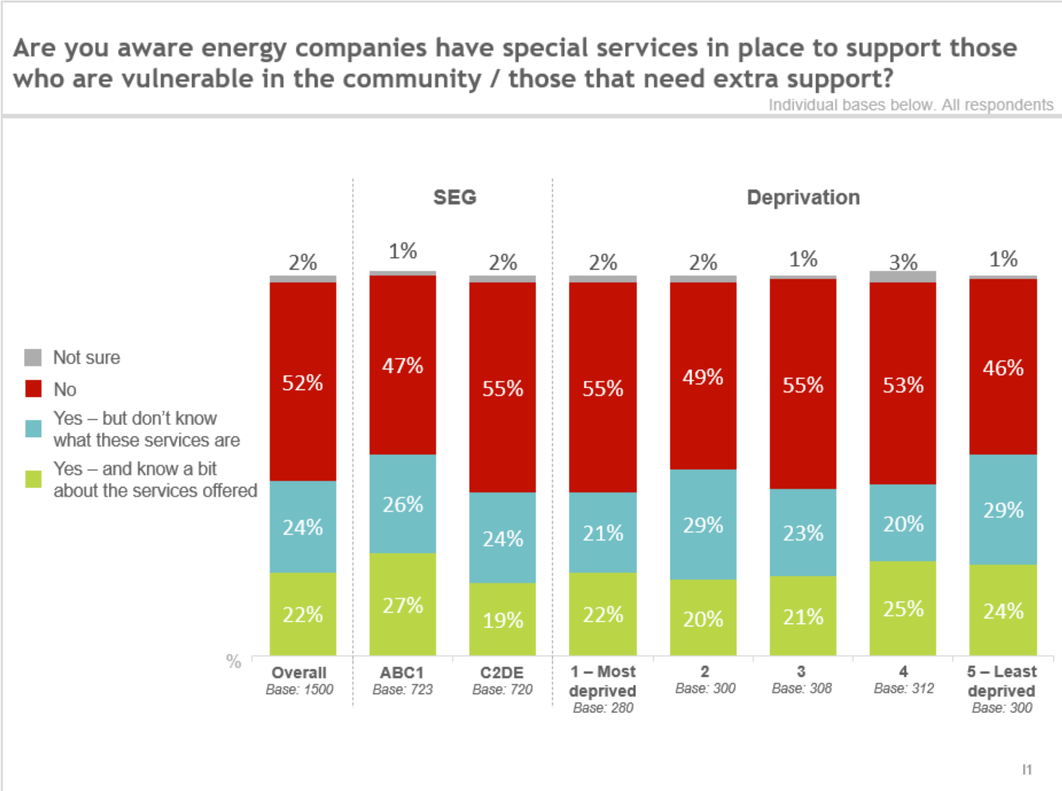


Figure 11.3 Awareness of support services offered by energy companies by disability/illness and confidence using the internet

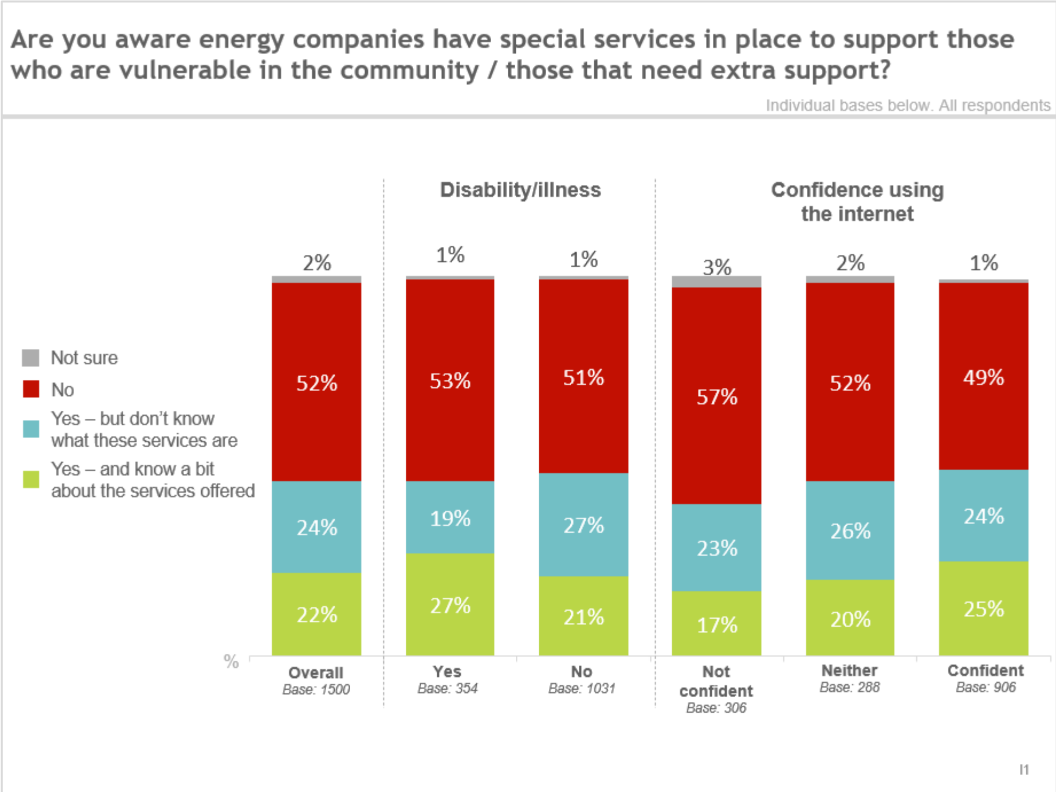
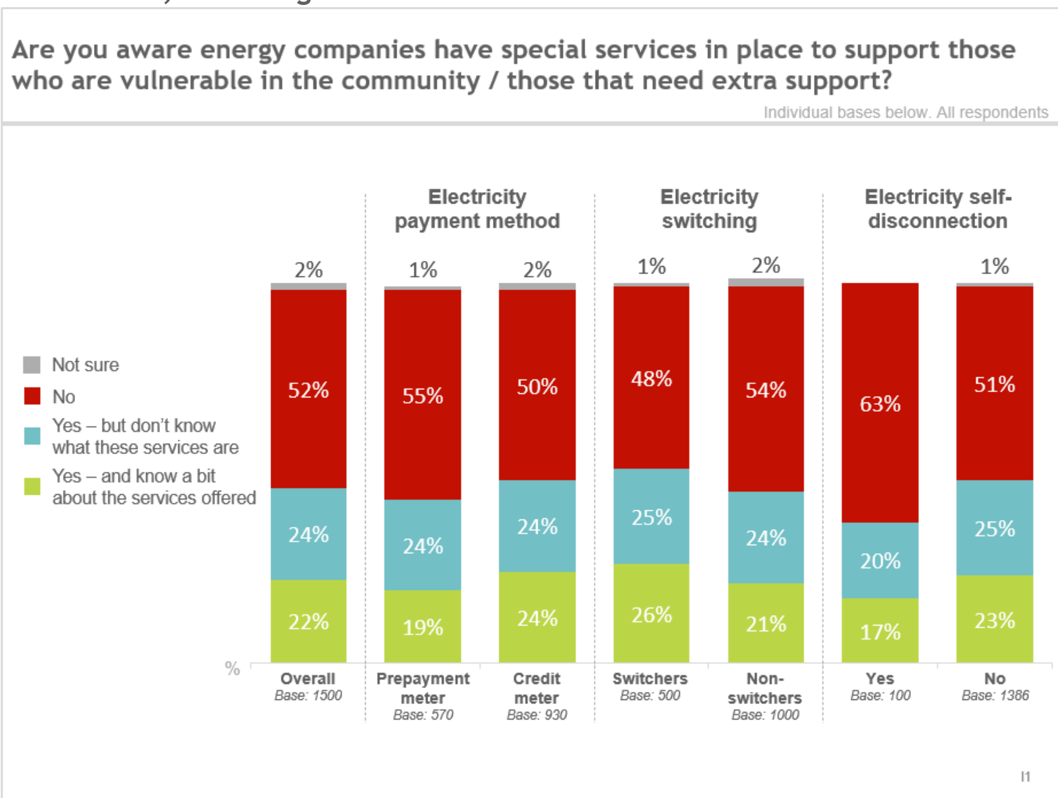


Figure 11.5 Awareness of support services offered by energy companies by electricity payment method, switching and self-disconnection



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 (97%) of domestic consumers had not used any of the support services. 3% were signed up to NIE Networks' Critical Care Register, and 1% were signed up to their supplier's Customer Care Register. One respondent requested a large print bill, while one had been included in the Password Scheme. 94% of those considered to be vulnerable had not signed up for any of the support services, while 90% of those who have or live with someone who has a disability or illness had not signed up (see Figure 11.7).

Figure 11.7 Use of support services offered by energy companies

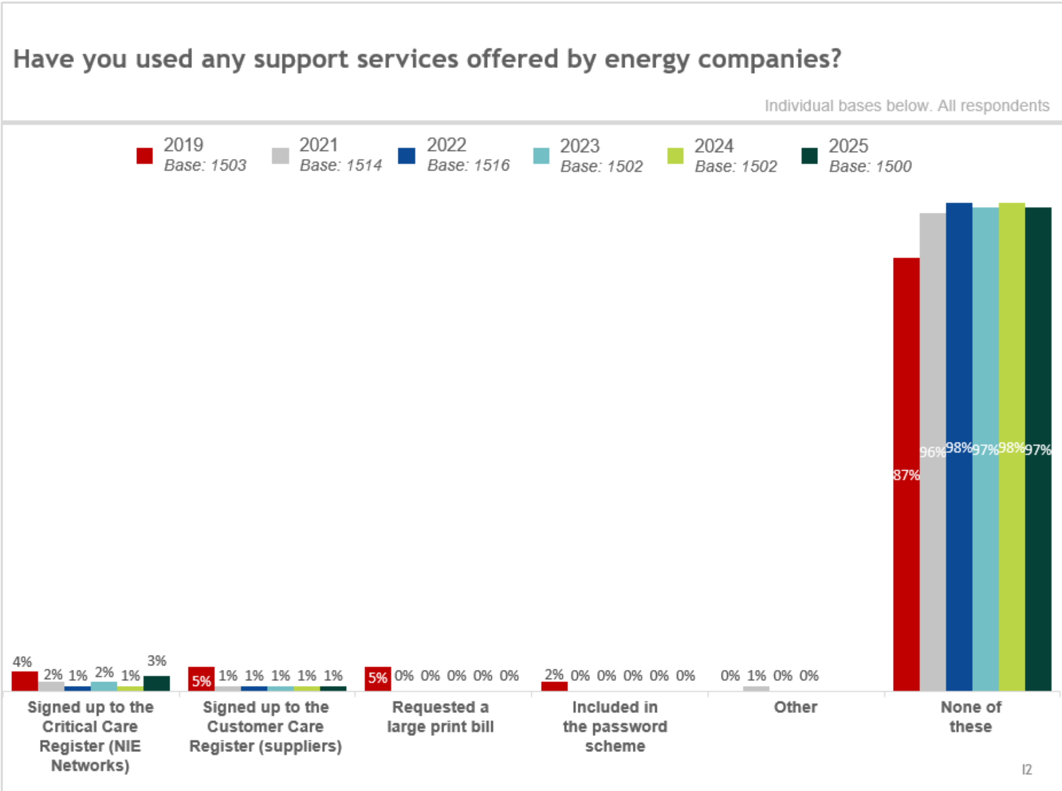


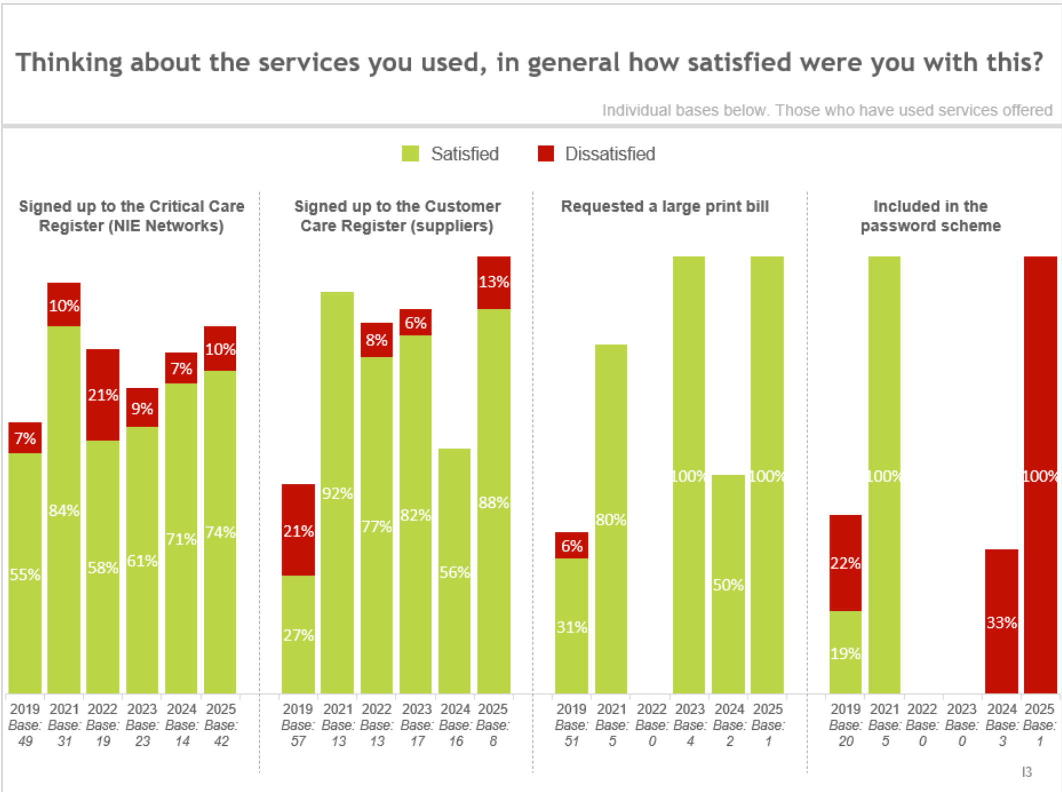
Table 11.1 Use of support services offered by energy companies by vulnerability and disability/illness

		Vulnerability			Disability/illness	
	Overall *Base: 1500*	High/medium vulnerability *Base: 661*	Low vulnerability *Base: 35*	Not vulnerable *Base: 804*	Yes *Base: 354*	No *Base: 1031*
Signed up to the NIE Networks Medical Care Register	3%	5%	-	1%	9%	1%
Signed up to the customer care register	1%	1%	-	0%	2%	0%
Requested a large print bill	0%	0%	-	-	0%	-
Included in the Password Scheme	0%	-	-	0%	-	0%
None of these	97%	94%	100%	99%	90%	99%

Satisfaction with support offered by energy companies

36 of the 48 domestic consumers who had used at least one of the support services said they were 'satisfied' or 'very satisfied' with the service. 31 of the 42 respondents who signed up to NIE Networks' Medical Customer Care Register reported satisfaction with the service, and 7 of the 8 who signed up to their suppliers Customer Care Register reported the same (see Figure 11.8).

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



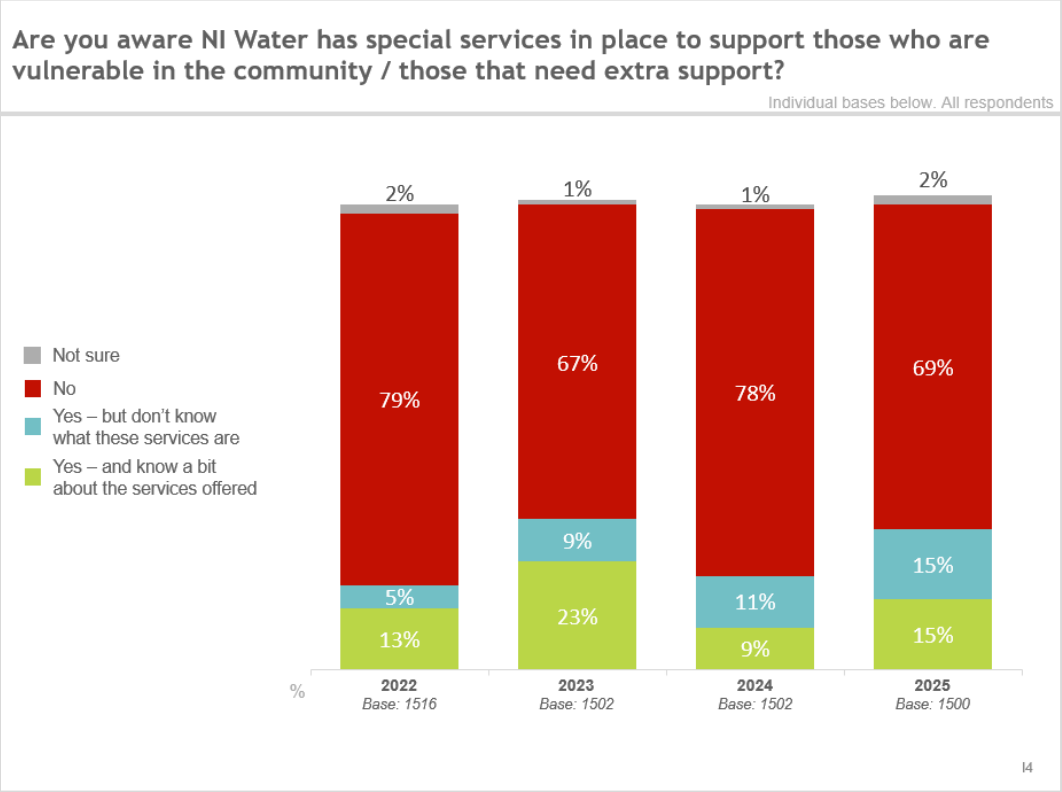
*Due to small sample sizes these findings are not generalisable.

NI Water

Awareness of support services offered by NI Water

30% of domestic consumers were aware that NI Water offered support services for vulnerable customers, including 15% who knew a bit about the services offered. This has increased since 2024, when 20% 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 (27%) and who have or live with someone who has a disability or illness (24%) were less likely to be aware of these services than those who are not vulnerable (32%) and who do not have or live with someone who has a disability or illness (33%). 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):

- 28% of those in the C2DE group said that they were aware of these services, compared to 33% in the ABC1 group;
- Respondents living in rural areas (12%) were less likely than those living in urban areas (17%) to say they knew a bit about the services offered;
- Those who do not consider themselves to be confident internet users (23%) were less likely to be aware of these services than confident internet users (33%); and
- 18% of those who have self-disconnected from their electricity supply said they had heard of these services, compared to 31% of those who have not self-disconnected.

Figure 11.10 Awareness of support services offered by NI Water by socioeconomic group and location

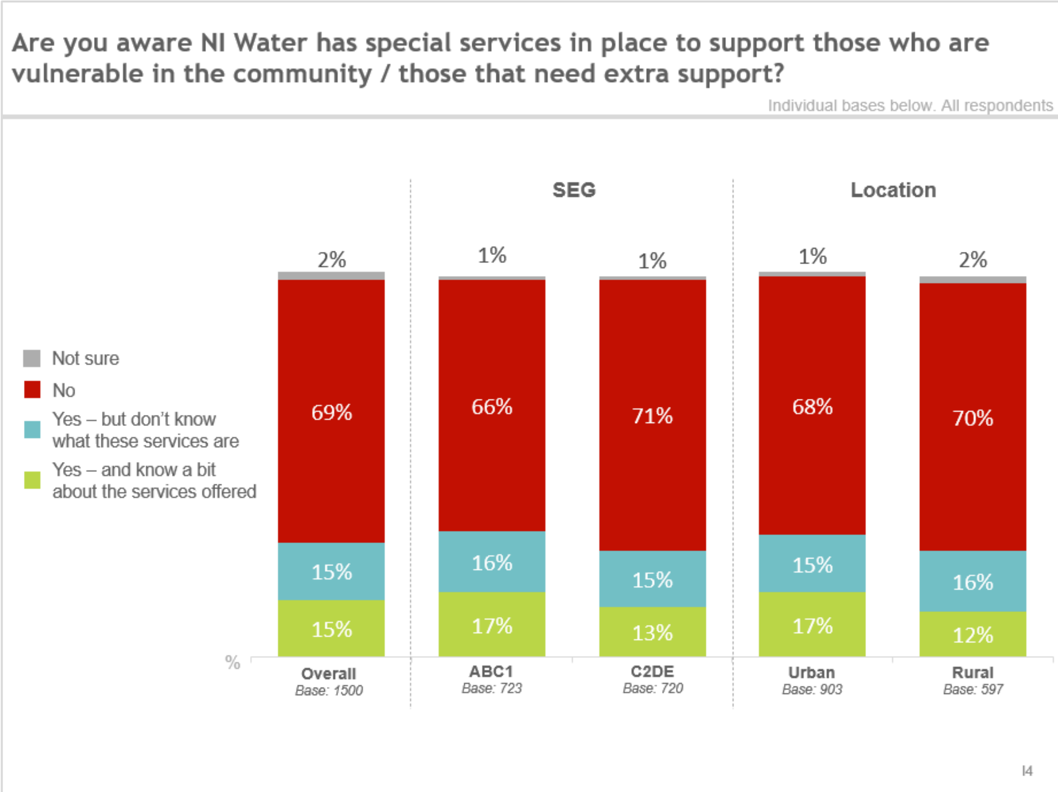


Figure 11.11 Awareness of support services offered by NI Water by disability/illness and vulnerability

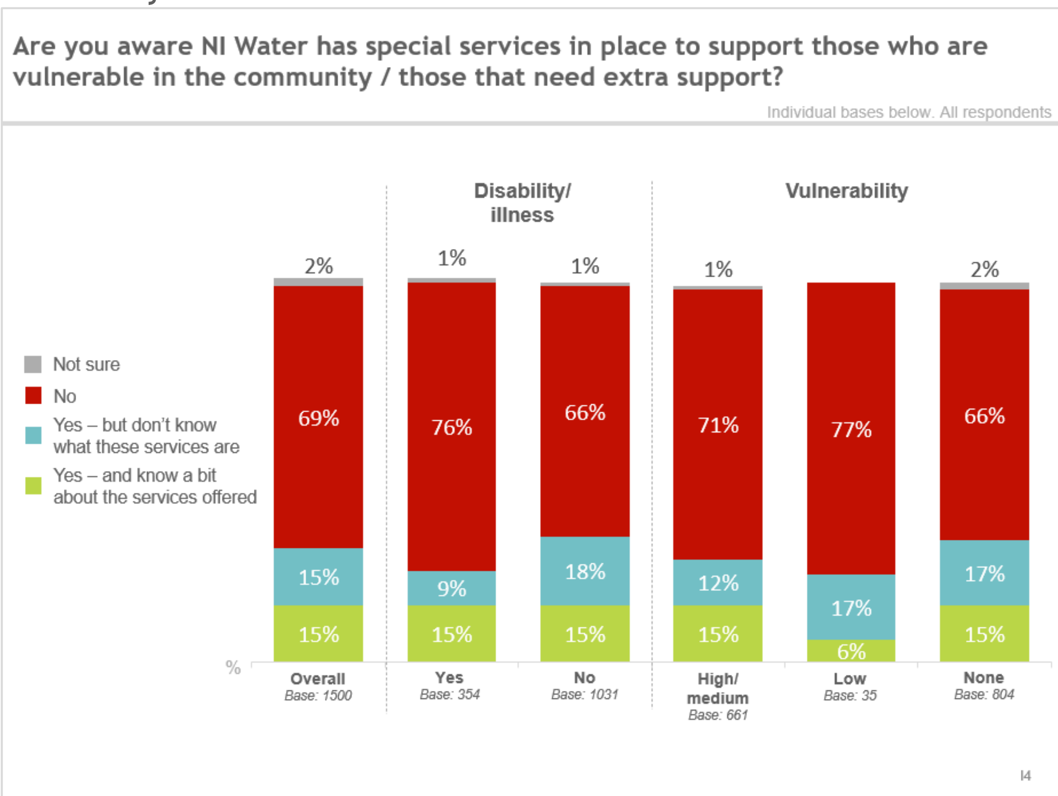
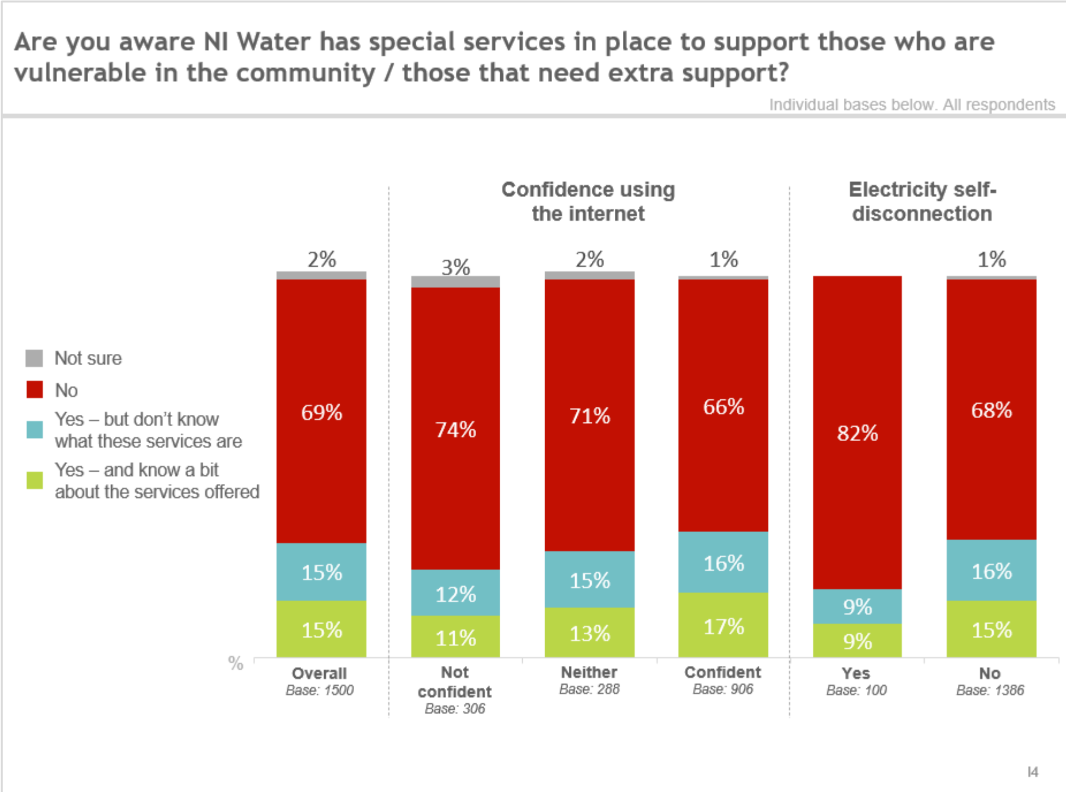


Figure 11.12 Awareness of support services offered by NI Water by confidence using the internet and electricity self-disconnection



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.

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.

Energy bill pressure is easing, but awareness of energy spend has fallen

The results from the 2025 Domestic Tracker show that there has been a fall in consumers who report that they are struggling with their bills, with the findings now more similar to those observed in 2021[14]. However, the results should be considered in the context of their timing, as data was collected before the recent escalation of geopolitical tensions in the Middle East which may have altered perceptions of energy affordability.

10% said they sometimes struggled with their electricity bills over the past year, which is down from 23% in 2024, 33% in 2023, and 39% in 2022 and similar to 13% in 2021. 17% of gas customers stated that they sometimes struggled with their bills, falling from 27% in the previous Tracker, 36% in 2023, and 33% in 2022, and similar to 15% in 2021. Fewer respondents also reported having to delay or go without essentials to pay for electricity, as well as having to reduce their electricity and gas usage and to have to borrow to pay their bills over the past 12 months. These findings were again similar to those obtained in the 2021 Tracker. However, it should be noted that several subgroups were more likely to report that they were struggling with their energy bills.

Around one in five (18%) of those with a prepayment meter for electricity stated that they sometimes struggled with their electricity bills in the past 12 months compared to 6% of those with a credit meter, with those on a prepayment meter for electricity also more likely to have gone without or delayed getting essentials to pay for electricity (6%, compared to 1% with a credit meter) and to have borrowed to pay for electricity (5%, compared to 1% with a credit meter). Respondents who have a prepayment meter for gas were also more likely to report sometimes struggling with their gas bills and having to go without or delaying getting essentials to pay for gas when compared to those with a credit meter.

Homeowners were less likely to say that they sometimes struggled with their electricity bills (7%, compared to 19% who privately rent and 28% in social housing), to have gone without or delayed getting essentials to pay for electricity (1%, compared to 7% who privately rent and 10% in social housing), and to have borrowed to pay for electricity in the past 12 months (1%, compared to 6% who privately rent and 10% in social housing).

[14] The findings are more similar to those observed in 2021, before the invasion of Ukraine led to a rise in wholesale energy costs.

One third (33%) of consumers reported that they spend £100 or more per month on electricity, down from 42% in 2024. 29% stated they spend £100 or more per month on their heating, falling from 45% in the previous Tracker and from 43% in the 2023 and 2022 Trackers. However, 13% were unaware of their electricity cost, the highest proportion across all previous Trackers, and one quarter (24%) of consumers were unaware of how much they spend per month on heating, increasing from 12% in 2024 and similar to 21% in 2023 and 22% in 2022. Those living in the most deprived areas were more likely than those in the least deprived areas to indicate that they were aware of their electricity spend, suggesting that those who are worst off are more aware of how much they are spending.

Greater engagement with supplier correspondence

The 2025 Tracker found that a greater proportion of consumers were now reading correspondence from their supplier. Over half reported that they read the last correspondence they received from their electricity supplier (54%), increasing from 42% in 2024 and 50% in 2023 to be similar to 56% in 2022. Over half (53%) of gas customers said they read the last correspondence they received from their supplier, increasing from 41% in 2024 and 49% in 2023 to be similar to 54% in 2022. Agreement that the information presented in the correspondence was clear and easy to understand also increased from the 2024 Tracker to be similar to the results observed in 2023.

While those who have a prepayment meter for electricity and for gas were more likely to be aware of their monthly electricity and heating spend, they were less likely to report receiving correspondence from their supplier and were less likely to state that they read the correspondence than those who have a credit meter.

Higher levels of trust and satisfaction in energy suppliers

There has been an increase in both trust and satisfaction with energy suppliers. 73% trust their electricity supplier to treat them fairly, higher than the 2024 (67%) and 2022 Trackers (63%) and similar to the 2023 (70%) and 2021 (69%) Trackers. 70% trust their electricity supplier to provide a fair price, higher than all previous Trackers. For gas customers, 75% said they trust their supplier to treat them fairly and 72% trust their supplier to give a fair price, higher than all previous Trackers.

Homeowners were, however, more likely to show distrust in their electricity supplier. 11% said that they distrust their electricity supplier to treat them fairly in their dealings compared to 4% who privately rent and 5% living in social housing, while 14% who own their home stated that they distrust their electricity supplier to provide a fair price, in comparison with 4% who privately rent and 8% who are in social housing. Electricity self-disconnectors were also less likely to report trust in their supplier to treat them fairly and to provide a fair price.

87% of electricity customers indicated satisfaction with the overall service they receive from their supplier, up from 80% in 2024 and 74% in 2022, and similar to 84% in 2023 and 87% in 2021. 86% of respondents with gas said they were satisfied with the overall service from their supplier, increasing from 75% in 2024 and 70% in 2022 to be more similar to the 2023 and 2021 (both 82%) Trackers. Electricity self-disconnectors were among those less likely to say they were satisfied with the overall service from their supplier.

Vulnerable consumers more likely to be struggling with energy bills

Consumers in the high and medium (HM) vulnerability group demonstrated greater awareness of their monthly energy spending but were also found to be more likely to struggle with their energy bills and to hold more negative views about their suppliers. 90% of those in the HM vulnerability group were aware of their monthly electricity spend compared to 85% not considered to be vulnerable, while four fifths (79%) in the HM vulnerability group were aware of their monthly heating spend, in comparison with 73% who are not vulnerable. Those in the HM vulnerability group were less likely to agree that the information in the correspondence from their electricity supplier was clear and easy to understand, and were also more likely to show distrust in their electricity supplier to provide a fair price, and in their gas supplier to treat them fairly when compared with those who are not vulnerable.

14% of those in the HM vulnerability group reported that they sometimes struggled with their electricity bills over the past 12 months compared to 6% who are not vulnerable, while one quarter (24%) of those in the HM vulnerability group said they sometimes struggle with their gas bills, in comparison to 8% of those who are not vulnerable. Respondents in the HM vulnerability group were also more likely to have:

- Gone without or delayed getting essentials to pay for electricity (5%, compared to 1% not considered to be vulnerable) and gas (9%, compared to 2% who are not vulnerable);
- Reduced their electricity (39%, compared to 27% not considered to be vulnerable) and gas usage in the past year (41%, compared to 30% who are not vulnerable); and
- Borrowed to pay for electricity (4%, compared to 1% who are not vulnerable) in the past year.

Those who have someone in their household with a disability or illness were more likely than those without to disagree that the information in the correspondence received from their electricity supplier was clear and easy to understand, with respondents who have children in their household less likely to agree with this than those who do not have children. Those who have children in their household were also less likely to trust their electricity supplier to treat them fairly and to provide a fair price. Those who have someone in their household with a disability or illness and those with children were less likely to be confident that they were on the best electricity deal and were more likely to have switched electricity supplier at least once. Both groups were also more likely to report that they sometimes struggle with their electricity and gas bills, while incidence of going without or delaying getting essentials, reducing electricity usage and borrowing to pay for electricity was more likely with those who have someone in their household with a disability or illness.

Even though respondents in the high and medium vulnerability group, who have someone in their household with a disability or illness, and who have children in their home were more likely to be struggling with their energy bills, they were also more likely to be willing to be charged extra on their bill for future investment and to allow vulnerable consumers to avail of discounted tariffs.

Low awareness and low uptake of energy supplier support

One fifth (22%) of respondents stated that they were aware of and knew a bit about the support services offered by energy companies to vulnerable consumers, similar to 23% in 2024 but lower than 36% observed in 2023 and 29% in the 2022 Tracker. Uptake of these services also remains low, with 97% of respondents saying they had not used any support services, including 94% of respondents who would be considered vulnerable and 90% of those who have or live with someone who has a disability or illness.

30% of respondents were aware of the services offered to vulnerable customers by NI Water, up from 20% in 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.

Limited change in switching behaviour

Three quarters (75%) of respondents said they were completely aware that they can choose between different electricity suppliers, up from 70% in the previous Tracker but lower than what was observed in 2023 (89%) and 2022 (83%). Incidence of comparing electricity deals was consistent with the 2024 Tracker (46%), but was lower than in 2023 (53%) and 2022 (54%).

45% reported that they had switched their supplier at least once, similar to 47% in 2024, and despite being lower than 51% observed in 2023, is also consistent with the 2022 (44%) and 2021 (46%) Trackers. Three quarters (74%) stated that they last switched their electricity supplier less than three years ago, similar to the 2024 Tracker (75%) and up from the 2023 (71%), 2022 (69%), 2021 (67%) and 2019 Trackers (70%).

Half (49%) of those with a prepayment meter for electricity said they have previously compared electricity deals, compared to 43% of those with a credit meter. Those on an electricity prepayment meter were also more likely to have switched their supplier at least once (48%, compared to 43% with a credit meter) and to have switched less than three years ago (80%, compared to 70% with a credit meter).

72% of those who had never switched their electricity supplier said they were happy with their current service, up from 60% in 2024. Reacting to a promotional offer (32%) and reacting to a doorstep seller (24%) remain the most common drivers for switching electricity supplier, although the use of doorstep sellers to switch fell from 40% in 2024 to 34% in the current Tracker.

18% of respondents stated they would be likely or very likely to switch their electricity supplier in the next 12 months, similar to 16% in 2024 but down from 25% in 2023. 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. 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.

Although electricity switchers were more likely to say they were confident they were on the best electricity deal available to them, they were also more likely to report that they are struggling. 39% of those who switched electricity supplier in the last three years said they spend £100 or more on electricity per month, compared to 31% of non-switchers. 14% of switchers said they sometimes struggled with their bill over the past year compared to 9% of non-switchers. Switchers were more likely to have gone without or delayed getting essentials in order to pay for electricity, and to have reduced their electricity usage in the past 12 months.

Older consumers are more engaged with correspondence but less engaged with their energy deal

Three in five (60%) respondents aged 65 and over stated that they read the last correspondence they received from their electricity supplier, more than any other age group. In contrast, under half (48%) of those aged 18 to 34 said that they had read the correspondence from their electricity supplier. However, those aged 65 and over were less likely to be able to recall how much they spend per month on electricity and heating than those in the younger age group. Younger respondents were more likely than those aged 65 and over to say they will switch their heating source (albeit not within the next three years). While there were no significant differences in awareness of being able to choose between electricity suppliers, older respondents were less likely to agree that having a choice of supplier gives access to better deals.

Respondents aged 65 and over were less likely than all other age groups to say they had compared electricity deals, with 63% confirming they had never switched electricity supplier compared to 51% aged 18 to 34. Older respondents who had switched electricity supplier were also less likely to have done so less than three years ago. Three quarters (75%) of older respondents stated that they would be unlikely to switch electricity suppliers in the next 12 months.

Low confidence with using the internet may restrict access to the best energy deals

94% of respondents reported that they have access to the internet, but one in five (20%) do not consider themselves to be confident internet users. Respondents who are not confident internet users were less likely to be aware of their monthly electricity and heating spend, and were more likely to pay for their electricity using cash. 93% of those who do not consider themselves to be confident internet users said they were aware that they can choose between electricity supplier, compared to almost all (98%) of those who say they are confident users, with those who are not confident less likely to agree that having a choice of supplier gives access to better electricity deals.

44% of those who are not confident internet users (compared to 56% who are confident) said they were confident they were on the best electricity deal available to them, with these respondents less likely to have compared electricity deals (25%, compared to 54% who are confident). As a result, over two thirds (68%) of those who are not confident internet users reported they have never switched their electricity supplier, compared to under half (47%) of those who are confident users, and only 8% said they would be likely to switch their electricity supplier in the next 12 months in comparison to one fifth (22%) of confident users.

Awareness of energy supplier obligations to protect their customers and how to make a complaint if these obligations are not met, along with awareness of the support services offered by energy companies and NI Water to vulnerable customers was also lower amongst those who do not consider themselves to be confident internet users.

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 heating or electricity in their home, the same proportion as in 2024. The proportion of respondents who use energy efficiency measures has also remained consistent with the previous two Trackers, with one quarter (26%) putting measures in place in the last three years compared to 25% in 2024 and 26% in 2023. However, of those who had not installed any measures in the last three years, half (51%) said that they had installed energy efficiency measures more than three years ago, and a further 30% stated that there were already measures in place in their home. 8% mentioned that they would be unable to install any energy efficiency measures as they are renting their property or do not have any control over structural changes.

2% of respondents indicated that they will switch their current energy source within the next three years which is similar to the results from the 2022 (2%), 2023 (3%) and 2024 (3%) Trackers. However, fewer than 1% of gas customers said that they would be switching their energy source within the next three years or beyond.

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 September and November 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, 2023 and 2024 Domestic Consumer Insight Tracker surveys. The questionnaire was designed in a multi-stage approach which allowed the UR to provide regular feedback on development of the questionnaire to ensure the content met its objectives and provided insightful information from which to draw policy implications. A short pilot was conducted prior to implementation of the main survey fieldwork. This was to ensure that the survey questions were easily understood and that the survey itself was of the intended average duration. No significant changes were required following this process.

Sample design

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

Sampling frame

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

Table A1: Demographics of NI domestic energy consumers

STRATIFICATION VARIABLE		PERCENTAGE IN NI POPULATION 18+
Age (HRP)	18 - 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.

[15] 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.[16]

STRATIFICATION VARIABLE		ACHIEVED NO.	ACHIEVED %
Age (HRP)	18 - 34	201	13%
	35 - 44	248	17%
	45 - 64	605	40%
	65 and over	443	30%
	Prefer not to say	3	0%
Gender	Male	759	51%
	Female	737	49%
	Other	4	0%
SEG[17]	ABC1	723	48%
	C2DE	720	48%
	Prefer not to say	57	4%
Urban/Rural	Urban	903	60%
	Rural/Mixed	597	40%
Council	Antrim and Newtownabbey	123	8%
	Ards and North Down	136	9%
	Armagh City, Banbridge and Craigavon	168	11%
	Belfast	265	18%
	Causeway Coast and Glens	122	8%
	Derry City and Strabane	114	8%
	Fermanagh and Omagh	88	6%
	Lisburn and Castlereagh	122	8%
	Mid and East Antrim	110	7%
	Mid Ulster	114	8%
	Newry, Mourne and Down	138	9%
Multiple Deprivation Measure quintile	1 – Most deprived	280	19%
	2	300	20%
	3	308	21%
	4	312	21%
	5 – Least deprived	300	20%
Total		**1500**	**100%**

[16]Percentages cited in this report were calculated using unrounded figures then rounded to the nearest whole percent. Percentages for categories in the charts therefore may not sum to 100% due to rounding. Percentages cited that combine multiple response categories may not be equal to the sum of the rounded percentages for these categories.
[17]The socioeconomic group is based on the occupation of the chief income earner in the household. Those in the ABC1 group consist of people working in higher, intermediate and junior managerial, administrative, professional occupations. Those in the C2DE group consist of people working in skilled, semi-skilled, and unskilled manual occupations, as well as those who are unemployed.

Margin of error

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

Table A3: Margin of error

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

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

Implementation

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

Data cleaning and quality assurance

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

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

Appendix B - Detailed demographics

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

Table B.1: Gender

Gender		
Gender	Count	Percentage
Male	773	51%
Female	729	49%
Other	**	0%
Prefer not to say	**	0%
Total	***1500***	***100%***

**Suppressed due to small numbers

Table B.2: Age

Age		
Age	Count	Percentage
18-34	201	13%
35-44	248	17%
45-64	605	40%
65 plus	443	30%
Refused	**	0%
Total	***1500***	***100%***

**Suppressed due to small numbers

Table B.3: Tenure

Tenure		
Tenure	Count	Percentage
Rent from a private landlord	124	9%
Rent from NI Housing Executive	143	10%
Rent from a housing association	41	3%
Own your home or buying through a mortgage	1158	77%
Refused	34	2%
Total	***1500***	***100%***

Table B.4: Employment status

Employment status		
Employment status	Count	Percentage
Working full time	554	37%
Working part time	129	9%
Unemployed	116	8%
Retired	639	43%
Student	13	1%
Other	20	1%
Refused	29	2%
Total	***1500***	***100%***

Table B.5: Means tested benefit

Means tested benefit		
Means tested benefit	Count	Percentage
Yes	333	22%
No	1127	75%
Don't know	40	3%
Total	***1500***	***100%***

Table B.6: Socioeconomic group

Socioeconomic group		
SEG	Count	Percentage
AB	314	21%
C1	409	27%
C2	528	35%
DE	192	13%
Refused	57	4%
Total	***1500***	***100%***

Table B.7: Internet access*

Internet access		
Internet access	Count	Percentage
Access at home	1404	94%
Access outside of home	125	8%
Access using mobile data	115	8%
Do not have access	89	6%

*Multiple choice question

Table B.8: Method of accessing internet*

Method of accessing internet		
Method of accessing internet	**Count**	**Percentage**
Home computer/laptop	756	56%
Tablet/ iPad	574	41%
Public work computer/ laptop	263	19%
Mobile/ smartphone	1202	85%
Home of friends or family	312	22%
Smart TV	414	29%
Other	19	1%

*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	152	10%
2	154	10%
3	288	19%
4	483	32%
5 – Very confident	423	28%
Total	***1500***	***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	1418	95%
Yes, and speak one or more other languages	45	3%
No	9	1%
Refused	28	2%
Total	***1500***	***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	90	6%
NVQ Level 1, Foundation GNVQ, Basic Skills	13	1%
5 or more O levels (passes) / CSEs (grade 1) / GCSEs (grades A*- C), School Certificate, 1 A level / 2 - 3 AS levels / VCEs, Higher Diploma	170	11%
NVQ Level 2, Intermediate GNVQ, City and Guilds Craft, BTEC First / General Diploma, RSA Diploma	42	3%
Apprenticeship	39	3%
2+ A levels / VCEs, 4+ AS levels, Higher School Certificate, Progression / Advanced Diploma	162	11%
NVQ Level 3, Advanced GNVQ, City and Guilds Advanced Craft, ONC, OND, BTEC National, RSA Advanced Diploma	55	4%
Degree (for example BA, BSc), Higher degree (for example MA, PhD, PGCE)	370	25%
NVQ Level 4 - 5, HNC, HND, RSA Higher Diploma, BTEC Higher Level	60	4%
Professional qualifications (for example teaching, nursing, accountancy)	36	2%
Other vocational / work-related qualifications	30	2%
Foreign qualifications	11	1%
None of these	422	28%
Total	***1500***	***100%***

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

Disability, illness and other factors		
Disability, illness and other factors	**Count**	**Percentage**
Chronic/ serious illness	154	10%
Medically Dependent Equipment	53	4%
Oxygen use	10	1%
Physical impairment	150	10%
Unable to answer door	**	0%
Pensionable age	216	14%
Young children aged 5 or under	26	2%
Blind	**	0%
Partially sighted	**	0%
Hearing/ speech difficulties	9	1%
Unable to communicate in English	-	-
Dementia	**	0%
Developmental condition	30	2%
Mental health	22	1%
Bereavement	**	0%
Temporary life change	26	2%
Caring for an individual outside the household	**	0%
None of the above	876	58%
Prefer not to say	115	8%

*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	364	24%
2	579	39%
3	209	14%
4	207	14%
5	109	7%
6+	32	2%
Total	*1500*	*100%*

Table B.14: Children under 18 in household

Children under 18 in household		
Children under 18 in household	Count	Percentage
None	1047	70%
1	146	10%
2	172	11%
3	76	5%
4	17	1%
5+	**	0%
Refused	38	3%
Total	*1500*	*100%*

Table B.16: Location

Location		
Location	Count	Percentage
Urban	903	60%
Rural	597	40%
Total	*1500*	*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 <u>other than</u> 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 <u>main</u> 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
Previous supplier was leaving the market
Other (please specify)
Not sure

Those whose previous supplier was leaving the market at F6
Code one only

F6a Was your supplier switched automatically or did you have to look for a new supplier yourself?

Switched automatically
Had to look for a new supplier myself
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
I think switching is difficult to understand
Other, please specify

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
I think switching is difficult to understand
Other, please specify

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, have you done any of the following?

Code one only for each

ASK ALL	
1	We've reduced the amount of electricity we are using
Yes	
No	
Not sure	
2	We've had to borrow to pay our electricity bills
Yes	
No	
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
Yes	
No	
Not sure	
4	We've asked our electricity supplier for a bill payment holiday or breathing space
Yes	
No	
Not sure	
5	We've cancelled the direct debit payment for our electricity bill
Yes	
No	
Not sure	
Electricity PPM customers	
6	We've reduced the amount we usually put on our electricity prepayment meter
Yes	
No	
Not sure	
7	We've reduced the amount we usually put on our electricity prepayment meter
Yes	
No	
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, have you done any of the following?

ASK ALL	
1	We've reduced the amount of gas we are using
Yes	
No	
Not sure	
2	We've had to borrow to pay our gas bills
Yes	
No	
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
Yes	
No	
Not sure	
4	We've asked our gas supplier for a bill payment holiday
Yes	
No	
Not sure	
5	We've cancelled the direct debit payment for our gas bill
Yes	
No	
Not sure	
Gas PPM customers	
6	We've reduced the amount we usually put on our gas prepayment meter
Yes	
No	
Not sure	
7	We've used emergency or friendly credit
Yes	
No	
Not sure	

Section H: Consumer protections

ASK ALL

Code one only

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

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

If Yes at H1

Code one only

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

Yes
No
Not sure

Section I: Support services

ASK ALL

Code one only

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

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

ASK ALL

Select all that apply

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

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

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

If used a service at I2

Code one only

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

Very dissatisfied
Dissatisfied
Neither
Satisfied
Very satisfied
Don't know

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

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

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

ASK ALL
Select all that apply
I5 Have you used any support services offered by NI Water?

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

If used a service at I5
Code one only
I6 Thinking about the services you used, in general how satisfied were you with this? Please rate on a scale of 1-10, where 1 is very dissatisfied and 10 is very satisfied?

Very dissatisfied
Dissatisfied
Neither
Satisfied
Very satisfied
Don't know

Section J: Final Demographics

ASK ALL
Select one only
J1 Do you..?

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

ASK ALL
Select one only
J2 Which of the following best describes your current employment status?

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

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

Yes
No
Don't know

ASK ALL
J4 What is the occupation of the chief income earner in your household?
Open ended (to code SEG)

ASK ALL
Select all that apply
J5 Do you or any member of your household have access to the internet?

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

If yes at J5
Select all that apply
J6 How do you/ your household typically access the internet?

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

ASK ALL
Code one only
J7 Overall, how confident are you as an internet user?

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

ASK ALL
Code one only
J8 Can I check, is English your first or main language?

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

ASK ALL
Code one only
J9 What is the highest level of education you have completed?

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

ASK ALL
Select all that apply

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

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

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

Just me
2
3
4
5
6+

ASK ALL

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

ASK ALL
Code one only

KJ3 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