



Energy Strategy Consumer Research

22 April 2021



3 Wellington Park
Belfast
BT9 6DJ

T: 02890 923362
F: 02890 923334

info@socialmarketresearch.co.uk
www.socialmarketresearch.co.uk



Contents

| | |
|---|-----------|
| 1. Introduction | 17 |
| 1.1 Survey Aim | 17 |
| 1.2 Survey Design..... | 17 |
| 1.3 Survey Methodology..... | 19 |
| 1.3.1 Sample Profile..... | 19 |
| 1.4 Notes on Reporting..... | 20 |
| 2. Consumer Awareness, Understanding and Behaviour | 21 |
| 2.1 Concern about Climate Change / ‘Global Warming’ | 21 |
| 2.2 Understanding the language Used around Climate Change..... | 22 |
| 2.3 Knowledge of the Main Sources of Greenhouse Gases (Unprompted) | 23 |
| 2.4 Consumer Behaviour to Help Reduce Carbon Emissions | 25 |
| 2.4.1 Consumer Behaviour and Concerns About Climate Change | 27 |
| 2.4.2 Personally Taking Action to Limit Climate Change..... | 28 |
| 2.4.3 Personally Taking Action to Limit Climate Change and Behaviours..... | 29 |
| 2.4.4 Consumer Behaviour and Language Used Around Climate Change | 30 |
| 2.4.5 Language Used and Taking Action to Limit Climate Change..... | 31 |
| 2.5 Conclusions / Recommendations: Knowledge and Behaviour | 32 |
| 3. Low Carbon Technologies | 33 |
| 3.1 Consumer Awareness of Different Types of LCT | 33 |
| 3.2 Likelihood of Purchasing or installing Low Carbon Technology | 35 |
| 3.3 Reasons Already Installed or Purchased LCT (Unprompted)..... | 37 |
| 3.4 Reasons Likely to Install or Purchase LCT (Unprompted) | 38 |
| 3.5 Reasons for being Unlikely to Install or Purchase LCT (Unprompted) | 39 |
| 3.6 Financial incentive and Purchasing / Installing LCT | 40 |
| 3.7 Conclusions and Recommendations: Low Carbon Technology | 42 |
| 4. Energy Efficiency Measures | 44 |
| 4.1 Consumer Awareness of Different Energy Efficiency Measures | 44 |
| 4.2 Likelihood of Purchasing or Installing Energy Efficiency Measures..... | 47 |
| 4.3 Reasons Already Installed Energy Efficiency Measures (Unprompted) | 49 |
| 4.4 Reasons Likely to Install / Purchase Energy Efficiency Measures (Unprompted) | 50 |
| 4.5 Reasons Unlikely to Install / Purchase Energy Efficiency Measures (Unprompted) | 51 |
| 4.6 Financial incentive: Purchasing/Installing Energy Efficiency Measures | 52 |
| 4.7 Conclusions and Recommendations: Energy Efficiency Measures..... | 54 |
| 5. Electric Vehicles or Hybrids..... | 55 |

| | | |
|-------|---|----|
| 5.1 | Likelihood of Purchasing an Electric Vehicle or Hybrid | 55 |
| 5.2 | Reasons Already Purchased an Electric Vehicle or Hybrid (Unprompted) | 57 |
| 5.3 | Reasons Likely to Purchase an Electric Vehicle or Hybrid (Unprompted) | 58 |
| 5.4 | Reasons Unlikely to Purchase an Electric Vehicle or Hybrid (Unprompted) | 59 |
| 5.5 | Financial incentive: Purchasing an Electric Vehicle or Hybrid | 60 |
| 5.6 | Conclusions and Recommendations: Electric Vehicles and Hybrids | 62 |
| 6. | Consumer Protection and Trust and Support for a Single Advice Body | 63 |
| 6.1 | Obtaining Trusted Information on Reducing Carbon Emissions (Unprompted) | 63 |
| 6.2 | Support for a Single Advice Body to Support Consumers | 65 |
| 6.3 | Conclusions and Recommendations: Consumer Protection / Trust | 66 |
| 7. | Government Initiatives and Consumer Attitudes | 67 |
| 7.1 | Consumer Support for Government Initiatives | 67 |
| 7.2 | Consumer Attitudes to Climate Change Issues | 69 |
| 7.3 | Conclusions / Recommendations: Initiatives and Consumer Attitudes | 72 |
| 8. | Reducing Carbon Emissions and Willingness to Pay | 73 |
| 8.1 | Primary Responsibility for Reducing Carbon Emissions | 73 |
| 8.2 | Willingness to Pay for Investment in Energy Infrastructure | 74 |
| 8.2.1 | Reasons Not Prepared to Pay for Investment | 76 |
| 8.2.2 | Paying for Reducing Carbon Emissions in N Ireland | 77 |
| 8.3 | Conclusions / Recommendations: Willingness to Pay | 79 |
| 9. | Energy Priorities and Consumer Concerns | 80 |
| 9.1 | Ranked Importance of Different Energy Issues | 80 |
| 9.2 | Concerns about Energy Related Issues in the Future | 82 |
| 9.3 | Conclusions and Recommendations: Importance of Energy Issues | 84 |
| 10. | Impact of Covid-19 on Energy Use | 85 |
| 10.1 | Change in Use of Energy | 85 |
| 10.2 | Impact of Covid-19 on Electricity Costs: Electricity Credit Customers | 86 |
| 10.3 | Impact of Covid-19 on Gas Costs: Natural Gas Credit Customers | 87 |
| 10.4 | Impact of Covid-19 on Electricity Costs: Electricity PPM Customers | 88 |
| 10.5 | Impact of Covid-19 on Gas Costs: Natural Gas PPM Customers | 89 |
| 10.6 | Going Without Electricity Really Needed in the Home (last 12 months) | 90 |
| 10.7 | Going Without Gas Really Needed to Heat Home (last 12 months) | 91 |
| 10.8 | Conclusions / Recommendations: Impact of Covid-19 on Consumers | 92 |

| | |
|---|-----------|
| 11. Consumers Contacting Energy Suppliers for Help and Support | 93 |
| 11.1 Reasons for Contacting Energy Suppliers for Help and Support | 93 |
| 11.2 Assistance Offered to Consumer by Energy Suppliers | 94 |
| 11.3 Views on Help and Support Provided by Energy Suppliers | 95 |
| 11.4 Satisfaction with Outcome of Contact with Energy Supplier | 96 |
| 11.5 Reasons Why Consumers did not Contact their Energy Supplier | 96 |
| 11.6 Conclusions and Recommendations: Contact with Energy Suppliers | 97 |
| Appendix 1 (Questionnaire)..... | 98 |

List of Figures

| | |
|---|----|
| Figure 1: How concerned if at all, are you about current climate change, sometimes referred to as 'global warming'? (base=1206) | 21 |
| Figure 2: How easy or difficult do you find it to understand the language used around climate change, sometimes referred to as or 'global warming'? (base=1206) | 22 |
| Figure 3: In Northern Ireland what do you think are the main sources of greenhouse gases that contribute to climate change? [Unprompted] (base=1206) | 23 |
| Figure 4: Thinking about your everyday life, do you consciously do any of the following to help reduce carbon emissions or limit climate change? (base=1206) | 25 |
| Figure 5: Concerns about climate change and engaging in behaviours to limit climate change? (base=1206) | 27 |
| Figure 6: How important is it for you personally to take action to help limit the effects of climate change? (base=1206) | 28 |
| Figure 7: Importance of personally taking action to limit climate change and engaging in behaviours to limit climate change? (base=1206) | 29 |
| Figure 8: Understanding the language used around climate change and consciously doing any of the following to limit climate change? (base=1206) | 30 |
| Figure 9: Understanding the language used around climate change and the importance of personally taking action to limit climate change? (base=1206) | 31 |
| Figure 10: How much, if anything, would you say you know about each of the following low carbon technologies? (n=1206) | 33 |
| Figure 11: How likely is it that you will purchase or install any form of low carbon technology in your home in the future? (base=1206) | 35 |
| Figure 12: What was the single most important reason for installing low carbon technology in your home? [unprompted] (base=156) | 37 |
| Figure 13: What would be the single most important reason for installing low carbon technology in your home in the next few years? [unprompted] (base=433) | 38 |
| Figure 14: What is the main reason for you being unlikely to install low carbon technology in your home in the next few years? [unprompted] (base=617) | 39 |
| Figure 15: To what extent would a financial incentive impact your decision to purchase or install low carbon technology? (base=1206) | 40 |
| Figure 16: How much, if anything, would you say you know about each of the following energy efficiency measures? (n=1206) | 44 |
| Figure 17: How likely is it that you will purchase or install any type of energy efficiency measure in your home in the future? (base=1206) | 47 |
| Figure 18: What was the single most important reason for installing an energy efficiency measure in your home? [unprompted] (base=239) | 49 |
| Figure 19: What would be the single most important reason for installing an energy efficiency measure in your home in the next few years? [unprompted] (base=465) | 50 |
| Figure 20: What is the main reason for you being unlikely to install an energy efficiency measure in your home in the next few years? [unprompted] (base=502) | 51 |
| Figure 21: To what extent would a financial incentive impact your decision to purchase or install energy efficiency measures? (base=1206) | 52 |
| Figure 22: How likely is it that you would purchase an electric vehicle or hybrid over the next few years? (base=1206) | 55 |
| Figure 23: What was the single most important reason for purchasing an electric vehicle or hybrid? [unprompted] (base=54) | 57 |
| Figure 24: What would be the single most important reason for purchasing an electric vehicle or hybrid in the next few years? [unprompted] (base=359) | 58 |
| Figure 25: What is the main reason for you being unlikely to purchase an electric vehicle or hybrid in the next few years? [unprompted] (base=793) | 59 |

| | |
|---|----|
| Figure 26: To what extent would a financial incentive impact your decision to purchase an electric vehicle or hybrid? (base=1206) | 60 |
| Figure 27: If you wanted to get trusted information, advice, or guidance from an organisation on reducing your carbon emissions, who or where would you go to obtain this information? (base=1206) [unprompted] | 63 |
| Figure 28: To support consumers one possible option is a single advice body in Northern Ireland to provide consumers with information, advice and support to reduce their carbon emissions. Would you be supportive or unsupportive of this option? (base=1206) | 65 |
| Figure 29: There are different ways consumers can be supported by government to reduce their carbon emissions. Please say how supportive or unsupportive you would be of each of the following initiatives? (n=1206) | 67 |
| Figure 30: I am now going to read you out a number of statements and please say to what extent you agree or disagree with each (n=1206) | 69 |
| Figure 31: Who do you think should primarily be responsible for reducing carbon emissions in Northern Ireland? (base=1206) | 73 |
| Figure 32: Generating energy from renewable sources such as wind power, solar energy and biomass etc. will need more investment in the energy infrastructure. As an energy consumer, how much would you be willing to see your bill rise to support this? (base=1206) | 74 |
| Figure 33: Is the reason you would not pay because you are unwilling to pay or because you are unable to pay? (base=504) | 76 |
| Figure 34: Reducing carbon emissions and tackling climate change comes at a cost. Who do you think should <u>pay</u> for reducing carbon emissions in Northern Ireland? (base=1206) [multiple choice question] | 77 |
| Figure 35: Thinking of the following three issues, please rank them in order of importance? (base=1206) | 80 |
| Figure 36: I'm now going to ask you how concerned you are about various things happening in the next 10-20 years. So how concerned, if at all, are you about..? (n=1206) | 82 |
| Figure 37: We would like to understand more about how the Covid 19 pandemic has affected your energy usage. Which of the following statements best describes your situation? (base=1206) | 85 |
| Figure 38: We would like to understand more about how the Covid 19 pandemic has affected your electricity costs. Which of the following statements best describes your situation? (base=866) | 86 |
| Figure 39: We would like to understand more about how the Covid 19 pandemic has affected your gas costs. Which of the following statements best describes your situation? (base=281) | 87 |
| Figure 40: We would like to understand more about how the Covid 19 pandemic has affected your electricity costs. Which of the following statements best describes your situation? (base=340) | 88 |
| Figure 41: We would like to understand more about how the Covid 19 pandemic has affected your gas costs. Which of the following statements best describes your situation? (base=127) | 89 |
| Figure 42: Thinking about the last 12 months during the Covid 19 pandemic, have you ever gone without electricity that you really needed in your home? (base=1206) | 90 |
| Figure 43: Why have you gone without electricity the last 12 months during the Covid 19 pandemic, that you really needed in your home? (base=73) | 90 |
| Figure 44: Thinking about the last 12 months during the Covid 19 pandemic, have you ever gone without gas that you really needed in your home? (base=408) | 91 |

| | |
|---|----|
| Figure 45: Why have you gone without gas the last 12 months during the Covid 19 pandemic, that you really needed in your home? (base=17) | 91 |
| Figure 46: The Covid-19 pandemic has impacted on consumers in different ways. Because of the pandemic did you contact your energy supplier for help or support? (base=1206) | 93 |
| Figure 47: Why did you have to contact your energy supplier? (base=38) [multiple response question - consumers could give more than one answer] | 93 |
| Figure 48: Briefly, what help or assistance was offered by your supplier? [multiple response question - consumers could give more than one answer] (base=38) | 94 |
| Figure 49: Thinking back to when you contacted your energy supplier, please say if agree or disagree with each of the following statements? (n=38) | 95 |
| Figure 50: How satisfied or dissatisfied were you with the outcome of your contact with your energy supplier? (base=38) | 96 |
| Figure 51: Why did you not contact you energy supplier for help or support during the pandemic? (base=1168) | 96 |

Executive Summary

In January 2021, the Utility Regulator (UR) commissioned Social Market Research (SMR) to undertake consumer survey research on two specific areas: consumer understanding and awareness of climate change and net zero; and, consumer experience of energy and energy suppliers during the Covid-19 pandemic.

It is anticipated that the research outcomes will support the Utility Regulator with future workstreams, as well as providing insight to support the Department for the Economy (DfE) in the development of a new Energy Strategy for Northern Ireland. The research findings will also provide the Utility Regulator with initial insights into how the Covid-19 pandemic has impacted on energy consumers in Northern Ireland.

The survey is based on telephone interviews with a representative sample of 1206 Northern Ireland consumers. Fieldwork on the survey was conducted in March 2021 and in accordance with the ISO20252 Standard.

Key Findings

Concerns About Climate Change

- A majority (64%) of consumers surveyed said they are concerned about climate change (33% were unconcerned: 1% were undecided: 1% don't believe in climate change), with particular groups more likely to be concerned (e.g. those aged under 60, those in higher social bands and those with a higher level of educational attainment etc.).

Understanding the Language Used Around Climate Change

- 67% find it easy to understand the language used around climate change (25% find it difficult and 8% answered, 'don't know'). Those more likely to find it easy to understand the language used include: men; those aged under 60; consumers with a higher level of educational attainment; and, those in higher social bands. Those who find it difficult to understand the language used are more likely to be older consumers, have lower levels of educational attainment, and be in lower social bands. This group is also less likely to be concerned about climate change, and to engage in positive behaviours to reduce carbon emissions.

Knowledge of Main Sources of Greenhouse Gas Emissions

- Consumers most commonly identified transport (e.g. air travel, cars etc.) [70%] as the main source of greenhouse gases contributing to climate change (35% cited use of energy by business; 34% energy supply: 34% use of energy in our homes: 25% and, agriculture / farming).

Consumer Behaviour to Reduce Carbon Emissions

- 59% said they consciously minimise the amount of energy they use at home to help reduce carbon emissions or limit climate change (36% said they walk, cycle or use public transport: 34% think about the energy efficiency of products and appliances they buy; 5% drive an electric car or hybrid).

- 82% consciously engaged in at least one behaviour (*e.g. think about the energy efficiency of products and appliances etc.*) to limit climate change, with these behaviours more prevalent among consumers aged under 60, those with a higher level of educational attainment, and those in higher social bands.
- Consumers more likely to be concerned about climate change were significantly more likely to consciously engage in behaviours to limit the effects of climate change (*e.g. minimise the amount of energy used in the home, 72% vs. 38%*)

Importance of Personally taking Action to Limit Climate Change

- 70% of consumers believe that it is important for them personally to take action to help limit the effects of climate change (*25% believe it is not important: 4% were undecided*). Those who believe that it is important to take action were more likely to consciously engage in behaviours to limit climate change (*e.g. walk, cycle or use public transport instead of using a car, 47% vs. 14%*).

Low Carbon Technology

- Consumers were more likely to know (*'a lot' or 'a little'*) about thermal solar panels (67%) compared with other low carbon technology (*condenser boilers, 50%: heat pumps, 34%: high heat retention storage heaters, 40%: biomass boilers, 38%*).
- 13% had already purchased or installed low carbon technology in their home (*36% would be likely to do so in the future: 51% said they would be unlikely to do so*).
- Lower energy bills (29%) was the most common reason why consumers had purchased or installed low carbon technology followed by previous system being old / at end of life (14%), and wanting to limit the effects of climate change (11%).
- Consumers likely to purchase or install low carbon technology in the future were more likely to be motivated by wanting to limit the effects of climate change (20%), their current system being old / at end of life (19%), and lower energy bills (17%).
- The most common reasons offered by consumers for being unlikely to purchase or install low carbon technology in the future included: not owning the property they live in (31%); installation costs / affordability (21%); and, not wanting the hassle of installing something new (9%).
- Approximately six out of ten (59%) consumers said that a financial incentive would make them more likely to install low carbon technology (*less likely, 3%: undecided, 8%*). A significant number (31%) said that a financial incentive would have no impact on their decision.

Energy Efficiency Measures

- Consumers were more likely to know (*'a lot' or 'a little'*) about loft insulation (86%) compared with other energy efficiency measures (*cavity wall insulation, 74%: oil to gas heating conversion, 64%: solid wall insulation, 58%: high energy efficiency oil boilers, 57%*).

- 20% had already purchased or installed energy efficiency measures in their home (38% *would be likely to do so in the future*; 42% *said they would be unlikely to do so*).
- Lower energy bills (33%), stopping heat loss / warmer home (29%), and undertaking a house renovation (8%), were the most common reasons why consumers had purchased or installed energy efficiency measures.
- Lower energy bills (25%), wanting to limit the effects of climate change (18%), and current system being old / at end of life (17%), were the most common reasons why consumers would be likely to purchase or install energy efficiency measures in the future.
- The most common reasons offered by consumers for being unlikely to purchase or install energy efficiency measures in the future included: not owning the property they live in (38%); installation costs / affordability (21%); and, not wanting the hassle of installing something new (10%).
- 61% of consumers said a financial incentive would make them more likely to install energy efficiency measures (*less likely*, 3%; *undecided*, 7%). More than a quarter of consumers (28%) said that a financial incentive would have no impact on their decision.

Electric Vehicles and Hybrids

- 5% of all consumers reported that they had already purchased an electric vehicle or hybrid (30% *would be likely to do so in the next few years*; 66% *said they would be unlikely to do so*).
- Lower running costs (33%) was the most common reason why consumers had purchased an electric vehicle or hybrid, with 24% doing so to limit the effects of climate change.
- A reduction in price was the most common reason why consumers would be likely to purchase an electric vehicle or hybrid (33%), followed by wanting to limit climate change (22%), and lower running costs (16%).
- Cost / affordability (39%), not being able to drive (15%), and having no plans to change vehicle (8%), were the most common reasons why consumers would be unlikely to purchase an electric vehicle or hybrid in the next few years.
- A majority (54%) of consumers said that a financial incentive would make them more likely to purchase an electric vehicle or hybrid (*less likely*, 5%; *undecided*, 9%). One in three (33%) said that a financial incentive would have no impact on their decision to purchase an electric vehicle or hybrid.

Obtaining Information on Reducing Carbon Emissions and Support for Government Initiatives

- Internet search engines (41%), energy efficiency companies / insulation companies (19%), local councils (17%), and energy suppliers (15%), were the most common

sources of advice or guidance if consumers wanted to obtain trusted information on reducing their carbon emissions.

- 82% of consumers are supportive of a single advice body in Northern Ireland to provide consumers with information, advice, and support to reduce their carbon emissions.
- More than eight out of ten consumers are supportive of a range of government initiatives to help consumers reduce their carbon emissions (*financial incentives to encourage consumers to change their behaviour, 87%: providing trusted information and advice to enable consumers to make their own decisions, 86%: educational programmes / awareness raising campaigns, 86%: and, organisations working with consumers to support them to change their behaviours, 84%*).
- Consumers are relatively less supportive (42%) of mandatory policies, such as no oil boilers or no diesel vehicles after a certain date.

Consumer Attitudes

- 58% of consumers believe there is a lot they can do personally to tackle climate change (18% disagree).
- 44% of consumers believe it is more important to reduce carbon emissions than it is to keep the cost of energy low (28% disagree)
- 43% of consumers disagreed when asked if they are '*...happy to pay more for renewable energy*', (31% agreed)
- 47% disagreed with the statement '*...reducing how much electricity and gas I use won't make any impact on carbon emissions*' (29% agreed)
- 55% of consumers disagreed with the view that they don't know how to reduce their carbon footprint (27% agreed)

Responsibility for Reducing Carbon Emissions in Northern Ireland and Willingness to Pay

- 40% of consumers believe everyone should be responsible for reducing carbon emissions in Northern Ireland (*government, 35%: energy companies, 18%: individuals / consumers 7%*).
- 42% of consumers said they would not be prepared to accept an increase in their energy bills to fund investment in the energy infrastructure to support renewables, with 38% saying they would be willing to pay (*note that half of those unprepared to pay said they are unable to pay, with the other half unwilling to pay*) [20% were undecided when asked about their willingness to pay].
- 48% of consumers believe the government should pay for reducing carbon emissions (*everyone should pay, 38%: energy companies, 38%: individuals / consumers, 9%*).

Ranked Importance of Different Energy Issues and Concerns About Energy Related Issues in the Future

- In order of importance, consumers ranked cost of energy and security of supply of equal importance, followed by achieving net zero carbon emissions.
- In relation to energy related matters in the future, consumers were most likely to be concerned about steep rises in energy prices (85%), and least likely to be concerned about sharing their data on energy use (48%).

Impact of Covid-19 Pandemic on Consumers

- Because of Covid-19, most consumers (59%) are using more energy than they usually do for this time of year (*40% are using the same amount*).
- 31% of consumers reported struggling to pay their energy bills because of the pandemic (*electricity credit customers, 25%: electricity prepayment, 48%: gas credit customers, 25%: gas prepayment meters, 37%*). Those more likely to struggle included younger consumers, those in lower social bands, those with a lower level of educational attainment, those living in urban areas, and those with an energy prepayment meter in their home.
- In the last 12 months, 6% of all electricity consumers had gone without electricity that they really needed in their home (*4% of natural gas customers had done so*), with affordability the main reason for having to go without [*electricity, 64%: natural gas, 76%*].

Contact with Energy Suppliers During the Covid-19 Pandemic

- Because of the pandemic, 3% of consumers had contacted their energy supplier for help or support. The most common reasons for doing so included: being unable to top up a prepayment meter (40%), a payment issue (37%), and, debt issue (26%) [*note that due to a relatively small sample size caution should be exercised when extrapolating these findings to all consumers who have contacted their energy supplier during the pandemic*].
- Those who contacted their energy supplier for help and support most commonly said their energy supplier offered: financial support for a prepayment meter top up (21%); to reduce their debt payment amount (21%); and, to refer them to an external advice agency for debt support (18%) [*again note the limitation of the relatively small sample size*].
- 84% of those contacting their energy supplier for help or support reported that their energy supplier listened to them and understood their issue, with a similar number (80%) saying their energy supplier had been supportive. Overall, 82% were satisfied with the outcome of their contact with their energy supplier [*again please note the limitation of the relatively small sample size*].
- 92% of those who did not contact their energy supplier during the pandemic said they had no need to (*2% needed to contact them but couldn't find their contact*

details: 1% needed to contact them but the phone was not answered or no one responded; 6% said they needed to contact them but didn't think they could help).

Overall Conclusions

- The evidence from this survey shows that a majority of Northern Ireland consumers are concerned about climate change, with particular groups (*e.g. those with a higher level of educational attainment, those in higher social bands etc.*) more likely to be concerned than others. Although most consumers find the language used around climate change easy to understand, the survey found that a significant number find it difficult (*e.g. those with a lower level of educational attainment, those in lower social bands etc.*), with these same consumers less likely to be concerned about climate change or to consciously engage in behaviours (*e.g. minimise the amount of energy they use in the home etc.*) to limit climate change. Those who believe it is important to personally take action to limit climate change were more likely to report positive behaviours to help limit the effects of climate change, with the inverse true for those who believe it is not important for them to personally take action.
- With the exception of thermal solar panels and condenser boilers, consumer knowledge of low carbon technology was found to be limited, with relatively few consumers having installed any form of low carbon technology. Looking to the future, the evidence from this research suggests limited take up of low carbon technology by consumers, although limiting climate change was found to be the most common motivator for purchasing or installing low carbon technology. Among consumers unlikely to purchase or install low carbon technology, the most common barriers to take up are not owning their home, affordability, and not wanting the hassle.
- Relative to low carbon technology, consumers were more knowledgeable about energy efficiency measures, albeit installation of these measures was again limited. As with low carbon technology, only a minority of consumers said they would be likely to purchase or install energy efficiency measures in the future, with lower energy costs again the most common motivating factor followed by wanting to limit the effects of climate change. The most common barriers to purchasing and installing energy efficiency measures were consumers not owning their home, affordability, and not wanting the hassle.
- The research found that very few consumers have purchased an electric vehicle or hybrid with most consumers saying they will be unlikely to do so in the next few years. Lower running costs was found to be the main reason for purchasing an electric vehicle or hybrid, with a reduction in price the single most important factor likely to encourage ownership in the future. Affordability was found to be the most common barrier to future ownership.
- Although the research shows a reluctance among consumers to purchase and install low carbon technology, energy efficiency measures and electric or hybrid vehicles, a majority of consumers reported that a financial incentive would make them more likely to do so. Financial incentives could be an important policy option moving forward given the likely positive impact on consumer purchasing decisions which can in turn help reduce carbon emissions.

- Given the research findings, increasing consumer knowledge of climate change, and supporting consumers to engage in behaviours to limit climate change, will be critical to Northern Ireland's commitment to achieve net zero by 2050. The evidence from this research shows that many consumers commonly turn to the internet to obtain trusted information on reducing their carbon emissions. However, certain groups of consumers turn to advice bodies and local government. This indicates that any future public information campaigns need to be both digital and non-digitally based.
- Consumers have also expressed a high level of support for a single body in Northern Ireland to provide them with information and advice to reduce their carbon emissions. As noted above, certain groups of consumers turn to advice bodies and local government for trusted information on reducing carbon emissions; so a single advice body would benefit from working in partnership with a broad range of organisations to disseminate consistent information and promote their services through these channels.
- There is also a high level of consumer support for specific government initiatives to help reduce carbon emissions, with the caveat that consumers are less supportive of mandatory policies, such as no oil boilers or diesel driven cars beyond certain dates.
- Although consumer attitudes to climate change were found to be generally positive, there is a tension between the need to reduce carbon emissions and cost, with only a minority of consumers willing to pay more to support investment in the energy infrastructure to support renewables. Opinion on who should pay to reduce carbon emissions is divided, with similar numbers of the view that everyone should pay against those who believe that the government should pay.
- Consumers ranked the cost of energy and security of supply equal in terms of the most important energy related issue, with achieving net zero ranked lowest. This strong focus on cost is consistent with the finding that the overwhelming majority of consumers are concerned about steep energy prices in the future, which makes it more important for consumers to understand the link between reducing carbon emissions and the necessary investment required in energy infrastructure.
- Using more energy than normal, and higher energy costs brought about by the Covid-19 pandemic, has meant that a significant minority of consumers have struggled to pay their energy bills during the last 12 months. Because of the pandemic, a relatively small number of consumers have had to contact their energy supplier for help and support, with most satisfied with the help and support provided by their energy supplier. In the short term, it is likely that the pandemic will have an adverse impact on consumer spending behaviour, including when making purchasing decisions which can help reduce carbon emissions.

Recommendations

- Given the positive association between consumer knowledge of climate change, and positive consumer behaviours in relation to limiting the effects of climate change, consideration should be given to developing and implementing a public information campaign. This campaign should target all consumers, with a specific focus on those groups identified in this research as being less knowledgeable and less concerned about limiting climate change. A key message of this campaign should be around the importance of taking personal responsibility for reducing carbon emissions, given the positive correlations between knowledge, attitudes and consumer behaviour to help reduce carbon emissions. Based on the evidence from this research, campaign messages should be communicated digitally and non-digitally.
- Allied to the previous point, consumers are supportive of a single advice body in Northern Ireland to help support them to reduce their carbon emissions. The recent Energy Strategy options consultation published by the Department for the Economy has proposed a “one stop shop” approach to energy information, advice and support. Based on the findings of this survey a core responsibility of this body could be increasing consumer knowledge and awareness of issues relating to climate change, as well as the role consumers can play in meeting the policy objective of net zero. This single advice body could also explore the option of providing wraparound support, whereby consumers are guided through the process of decision making through to installation and follow up support (e.g. for low carbon technology).
- Given that most consumers say they are unlikely to install or purchase low carbon technology, energy efficiency measures or electric vehicles or hybrids, policy aimed at reducing carbon emissions should consider making available financial incentives. The evidence from this research shows that financial incentives are likely to motivate consumers to make spending decisions which will have a positive impact on reducing carbon emissions. To further motivate positive consumer behaviour change, financial incentives could be tied to key trigger points such as when old heating systems reach end of life.
- Policy responses beyond targeting the behaviour of consumers will also be required, given that significant numbers of consumers live in private rented accommodation and in housing provided by the Northern Ireland Housing Executive and housing associations. Not owning your own home, and not being able to make changes to the fabric of the property, is a significant barrier to adopting positive spending behaviours aimed at reducing carbon emissions, and policy will be needed which centres on engaging with landlords to support them to make positive choices (e.g. *installing energy efficiency measures etc.*) in relation to limiting climate the effects of climate change.
- Investment in the energy infrastructure will be required to support renewables to allow Northern Ireland to meet its target of net zero by 2050. The finding that only a minority of consumers are willing to accept an increase in their energy bills to support investment in renewables presents policy makers with a significant challenge to convince consumers of the benefits of investment. This issue of cost needs to be central in future conversations between policy makers and consumers.

Indeed cost, and security of supply, trump the importance of achieving net zero, which again underscores the need for communicating with consumers how they can continue to make a difference to reducing carbon emissions.

- Further research should continue to monitor public sentiment on willingness to pay, as well as explore in more detail what factors would encourage an upward shift on this indicator. As well as ongoing quantitative research to measure trends over time, consideration should be given to exploring the issues raised in this research using qualitative methods, such as focus groups and depth interviews with different consumer groups, including those who appear to be more resistant to the energy transition generally.

1. Introduction

In January 2021, the Utility Regulator (UR) commissioned Social Market Research (SMR) to undertake consumer survey research on two specific areas:

- Consumer awareness of climate change and net zero; and,
- consumer experience energy and energy suppliers during the Covid-19 pandemic.

It is anticipated that the survey outcomes in relation to consumer awareness of climate change and net zero will help the Utility Regulator with future workstreams and research as well as providing insight to support the work of the Department for the Economy (DfE) in developing a new Energy Strategy for Northern Ireland.

This part of the survey work was included in the UR's Forward Work Programme (FWP) for 2020-21¹ and falls under two of the strategic objectives in the UR's Corporate Strategy (2019-2024)²:

- Strategic Objective 1 – promoting markets that deliver effective competition, informed choices and fair outcomes (FWP project 3); and,
- Strategic Objective 3 – ensuring security of supply and a low carbon future (FWP project 4).

In relation to Covid-19, the UR deemed it necessary to undertake some initial survey work to provide valuable insights into the experience of energy consumers during the pandemic. This survey work will help to inform what additional Covid related research needs to be progressed in the coming months.

1.1 Survey Aim

The aim of the survey was:

To measure domestic consumer understanding of net zero and the energy transition; their opinions on options for a low carbon future (including how it is funded); and their behaviours regarding energy efficiency and low carbon technology. The survey also sought to provide insight into the experience of energy consumers during the Covid-19 pandemic.

1.2 Survey Design

The questionnaire design phase was a collaborative process between the Utility Regulator and SMR, with questions developed around a number of key themes: awareness and understanding of climate change; consumer behaviour in relation to low carbon technology; energy efficiency measures; electric vehicles and hybrids; consumer attitudes to energy related matters; and, the impact of Covid-19 on energy consumers.

¹ [FWP 2021 final.pdf \(uregni.gov.uk\)](#)

² [Corporate Strategy 2019-24 final for web.pdf \(uregni.gov.uk\)](#)

The survey was developed predominantly using closed, prompted single and multi-item response questions. A limited number of open, or unprompted, questions were included in the survey, and where these have been used they are clearly referenced in the body of the report. All responses to the open questions have been included in the report.

The survey questionnaire was scripted for use as a telephone interview, with the survey questionnaire subject to testing and refinement prior to undertaking the main survey. The research team were mindful of the need to reduce the burden on survey respondents, with the final questionnaire taking 15 minutes on average to complete.

In terms of survey content, questions were developed to generate information on each of the following:

- Knowledge and awareness of climate change and / 'global warming'
- Understanding the language used around climate change / 'global warming'
- Behaviours to limit climate change / climate emissions
- Low carbon technologies (awareness and use)
- Energy efficiency measures in the home (awareness and use)
- Electric vehicles and hybrids
- Consumer protection and trust
- Support to a single consumer advice body
- Support for different government interventions to reduce climate change / 'global warming'
- Consumer attitudes to climate change / 'global warming'
- Willingness to pay for investment in the energy infrastructure to pay for renewables
- Concerns about energy related matters in the future
- Impact of the Covid-19 pandemic on energy consumers

A copy of the survey questionnaire is included as Appendix 1.

1.3 Survey Methodology

The research was conducted in line with ISO20252 of which Social Market Research (SMR) is fully accredited. The survey is based on 1206 telephone interviews with consumers. Interviews were conducted with adults aged 16+, with quotas set for age, gender, social class, and Local Government District (LGD). The survey was conducted using Computer Assisted Telephone Interviewing or CATI. Survey fieldwork was conducted between 13 March and 31 March 2021.

1.3.1 Sample Profile

Table 1 presents the sample profile compared with known population parameters and shows that sample estimates are in line with census estimates. The 95% Confidence Intervals are also presented.

| Table 1 Sample Profile Compared with NI Population Profile (NI Population aged 16+) [n=1206] ³ | | | | |
|---|--------------------------------------|------------|------------|-------------------------------|
| | | Census (%) | Sample (%) | 95% Confidence Interval (+/-) |
| Sex | Male | 48 | 47 | 44.2-49.8 |
| | Female | 52 | 53 | 50.2-55.8 |
| Age | 16-34 | 31 | 29 | 26.4-31.6 |
| | 35-59 | 42 | 45 | 42.2-47.8 |
| | 60+ | 27 | 26 | 23.5-28.5 |
| Social Class | ABC1 | 47 | 46 | 43.2-48.8 |
| | C2DE | 53 | 54 | 51.2-56.8 |
| Local Govt. District | Antrim and Newtownabbey | 8 | 7 | 5.6-8.4 |
| | Ards and North Down | 9 | 9 | 7.4-10.6 |
| | Armagh City, Banbridge and Craigavon | 11 | 11 | 9.2-12.8 |
| | Belfast | 18 | 18 | 15.8-20.2 |
| | Causeway Coast and Glens | 8 | 8 | 6.5-9.5 |
| | Derry City and Strabane | 8 | 7 | 5.6-8.4 |
| | Fermanagh and Omagh | 6 | 6 | 4.7-7.3 |
| | Lisburn and Castlereagh | 8 | 9 | 7.4-10.6 |
| | Mid and East Antrim | 7 | 7 | 5.6-8.4 |
| | Mid Ulster | 8 | 8 | 6.5-9.5 |
| | Newry, Mourne and Down | 10 | 10 | 8.3-11.7 |
| Natural Gas ⁴ | On-grid | 67 | 66 | 64.3-69.7 |
| | Off-grid | 33 | 34 | 30.3-35.7 |
| Heating Type | Oil | 51 | 68 | 48.2-53.8 |
| | Natural Gas | 34 | 30 | 31.3-36.7 |
| | Other | 15 | 2 | 13.0-17.0 |
| Location | Urban | 68 | 65 | 65.4-70.6 |
| | Rural | 32 | 35 | 29.4-34.6 |
| Source: Northern Ireland Census of Population (2018 Estimates) | | | | |

³ The respondent profiles in terms of the natural gas grid, heating type and location were generated to facilitate analysis by these factors and to support future policy development

⁴ Comparator provided by The Utility Regulator

1.4 Notes on Reporting

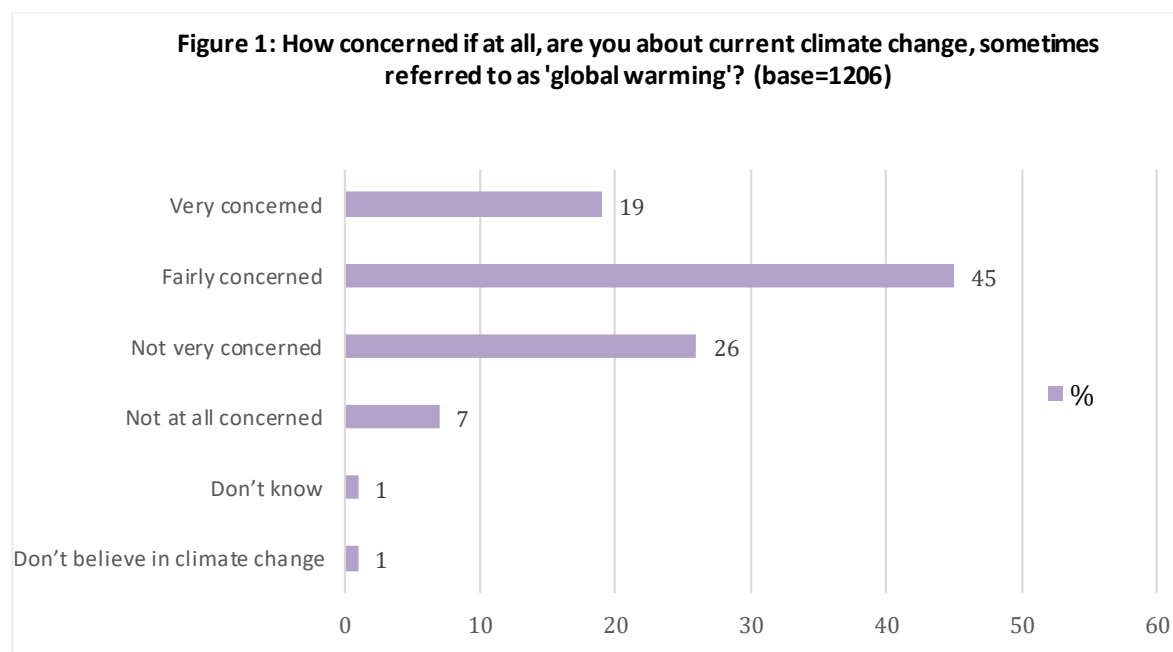
Please note that due to rounding, row and column totals in tables and figures may not sum to 100. Any differences between consumer subgroups (e.g. age, gender, social class etc.) alluded to in the report commentary are statistically significant to at least the 95% confidence level. Note also that most survey questions are prompted and the small number of questions that are unprompted have been clearly referenced.

2. Consumer Awareness, Understanding and Behaviour

2.1 Concern about Climate Change / 'Global Warming'

Consumers were asked how concerned, if at all, they are about current climate change, sometimes referred to 'global warming'.

Figure 1 shows that a majority (64%) said they are concerned about climate change / 'global warming' [*very concerned*, 19%; *fairly concerned*, 45%], with one in three not concerned (*not very concerned*, 26%; *not at all concerned*, 7%). One percent were undecided, with a further 1% saying they *don't believe in climate change*.



Differences between Consumer Groups (statistically significant)

Consumers **more likely to be concerned** about climate change included:

- Those aged under 60 (16-34, 67%; 35-59, 70%; 60+, 56%)
- Those in higher social bands (ABC1, 81%; C2DE, 52%)
- Economically active consumers (70% vs. 53%)
- Those with a higher level of educational attainment⁵ (low, 50%; medium, 60%; high, 82%)
- Non-disabled consumers (69% vs. 50%)
- Consumers in the North (North, 75%; South, 68%; East, 64%; West, 50%)⁶
- Owner occupiers (owner occup. 72%; NIHE, 45%; private rented, 47%; housing associations, 60%)
- Higher income consumers (=<£20K, 49%; £20K-£40K, 79%; >£40K, 92%)
- Those in households not in receipt of Universal Credit (71% vs. 51%).

⁵ Educational attainment level based on three categories of respondent: low [no formal educational qualifications and CSE, other than Grade 1]; medium [GCE A 'Level' (including NVQ Level 3), BTEC (National), BEC (National), TEC (National), ONC, OND and GCSE (including NVQ Level 2), GCE O' Level (including CSE Grade 1), Senior Certificate, and BTEC (General), BEC (General)]; high [BTEC (Higher), BEC (Higher), TEC (Higher), HNC, HND or Degree Level or higher].

⁶ Region variable created from local government district: (North: Antrim and Newtownabbey, Mid and East Antrim and Causeway Coast and Glens; South, Newry, Mourne and Down, Armagh, Banbridge Craigavon; East, Belfast, Lisburn Castlereagh, Ards North Down; West, Derry and Strabane and Fermanagh Omagh).

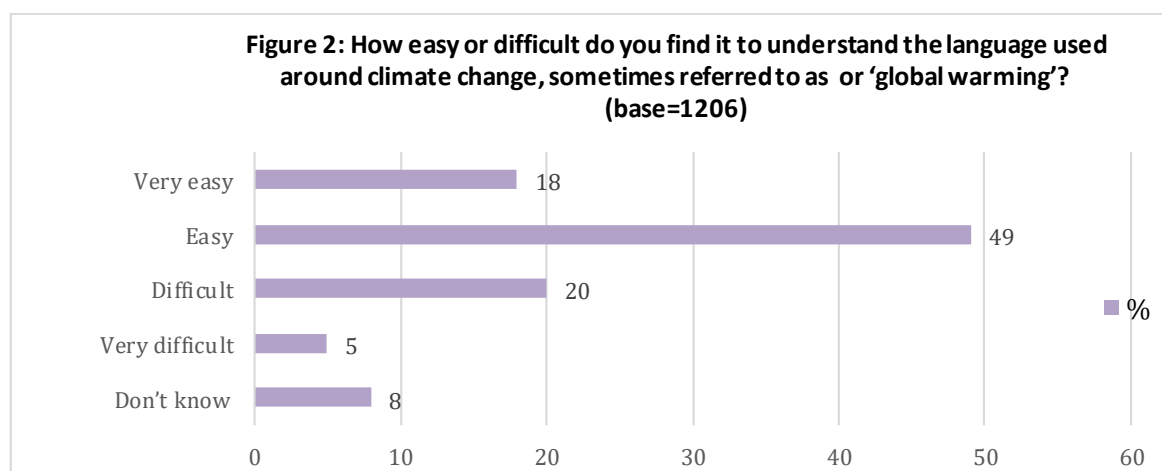
Consumers **more likely to be unconcerned** about climate change included:

- Those aged 60+ (16-34, 33%: 35-59, 30%: 60+, 44%)
- Those in lower social bands (C2DE, 48%: ABC1, 19%)
- Economically inactive consumers (48% vs. 30%)
- Consumers with a lower level of educational attainment (low, 50%: medium, 41%: high, 18%)
- Disabled consumers (50% vs. 31%)
- Consumers in the West (North, 25%: South, 32%: East, 36%: West, 50%)
- NIHE tenants (owner occup. 28%: NIHE, 55%: private rented, 53%: housing associations, 40%)
- Consumers on lower incomes (= \leq £20K, 51%: £20K-£40K, 21%: $>$ £40K, 8%)
- Those in households in receipt of Universal Credit (49% vs. 29%).

2.2 Understanding the language Used around Climate Change

Consumers were asked how easy or difficult they find it to understand the language used around climate change, sometimes referred to as 'global warming'.

Figure 2 shows that approximately two out of three (67%) consumers said they find it easy to understand the language used around climate change ('very easy', 18%: 'easy', 49%), with one in four (25%) saying they find it difficult ('difficult', 20%: 'very difficult', 5%). Almost one in ten (8%) answered, 'don't know'.



Differences between Consumer Groups (statistically significant)

Consumers **more likely to be find the language around climate change easy** included:

- Men (74% vs. 61%)
- Consumers aged under 60 (16-34, 72%: 35-59, 73%: 60+, 51%)
- Consumers in higher social bands (ABC1, 82%: C2DE, 54%)
- Economically active consumers (74% vs. 47%)
- Higher level of educational attainment (low, 41%: medium, 62%: high, 89%)
- Non-disabled (73% vs. 41%)
- Consumers in the West (North, 76%: South, 62%: East, 59%: West, 85%)
- Owner occupiers (owner occup. 72%: NIHE, 44%: private rented, 56%: housing associations, 62%)

- Higher income consumers (= <£20K, 47%; £20K-£40K, 76%; >£40K, 94%)
- Those in households not in receipt of Universal Credit (73% vs. 51%)
- Consumers living in rural areas (73% vs. 64%).

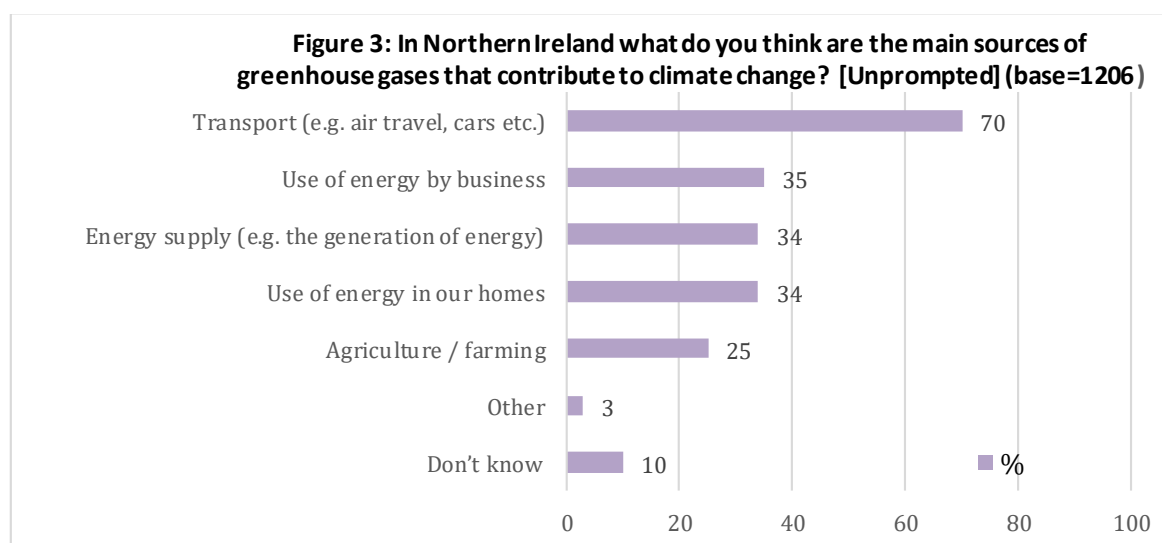
Consumers **more likely to be find the language around climate change difficult** included:

- Women (30% vs. 19%)
- Older consumers (16-34, 18%; 35-59, 22%; 60+, 37%)
- Consumers in lower social bands (ABC1, 14%; C2DE, 34%)
- Economically inactive consumers (40% vs. 20%)
- Those with a lower level of educational attainment (low, 45%; medium, 30%; high, 8%)
- Disabled consumers (48% vs. 20%)
- Consumers in the East (North, 18%; South, 29%; East, 32%; West, 9%)
- NIHE tenants (owner occup. 21%; NIHE, 38%; private rented, 35%; housing associations, 28%)
- Consumers on lower incomes (= <£20K, 40%; £20K-£40K, 17%; >£40K, 5%)
- Those in households in receipt of Universal Credit (35% vs. 21%)
- Consumers living in urban areas (27% vs. 21%).

2.3 Knowledge of the Main Sources of Greenhouse Gases (Unprompted)

Figure 3 shows that unprompted, seven out of ten (70%) consumers said transport is the main source of greenhouse gases which contribute to climate change.

Similar numbers of respondents identified the following contributors to greenhouse gases: use of energy by business (35%); energy supply (34%); and, use of energy in our homes (34%). One in five (25%) cited agriculture / farming, 3% other sources⁷ and 10% answered, 'don't know'.



⁷ Included: aerosols (n=5); water waste (n=4); deforestation (n=9); air pollution (n=1); plastic (n=1); human activity (n=6); fishing (n=2); fridges (n=3); dust (n=1); building houses (n=3); cement industries (n=1); coal usage (n=1); factory emissions (n=2); forest fires (n=1); fossil fuels (n=3); land use (n=1); energy companies (n=1); mass production (n=1); industry (n=1); methane from cattle (n=1); natural progression (n=1); waste (n=2); pollution (n=1); water vapour (n=3); mercury in water (n=1).

Differences between Consumer Groups (statistically significant)

More likely to mention **transport (e.g. air travel, cars etc.)** as a source of greenhouse gases

- Men (73% vs. 66%)
- Younger consumers (16-34, 75%: 35-59, 70%: 60+, 63%)
- Higher social bands (ABC1, 74%: C2DE, 66%)
- Higher level of educational attainment (low, 65%: medium, 69%; high, 74%)

More likely to mention **use of energy by business** as a source of greenhouse gases

- Men (38% vs. 32%)
- Higher social bands (ABC1, 40%: C2DE, 30%)
- Higher level of educational attainment (low, 21%: medium, 36%; high, 41%)

More likely to mention **energy supply (e.g. the generation of energy)** as a source of greenhouse gases

- Men (37% vs. 32%)
- Higher social bands (ABC1, 42%: C2DE, 28%)
- Higher level of educational attainment (low, 18%: medium, 30%; high, 49%)

More likely to mention **use of energy in our homes** as a source of greenhouse gases

- Men (37% vs. 32%)
- Consumers aged under 60 (16-34, 35%: 35-59, 37%: 60+, 27%)
- Higher social bands (ABC1, 39%: C2DE, 29%)
- Higher level of educational attainment (low, 20%: medium, 35%; high, 41%)

More likely to mention **agriculture / farming** as a source of greenhouse gases

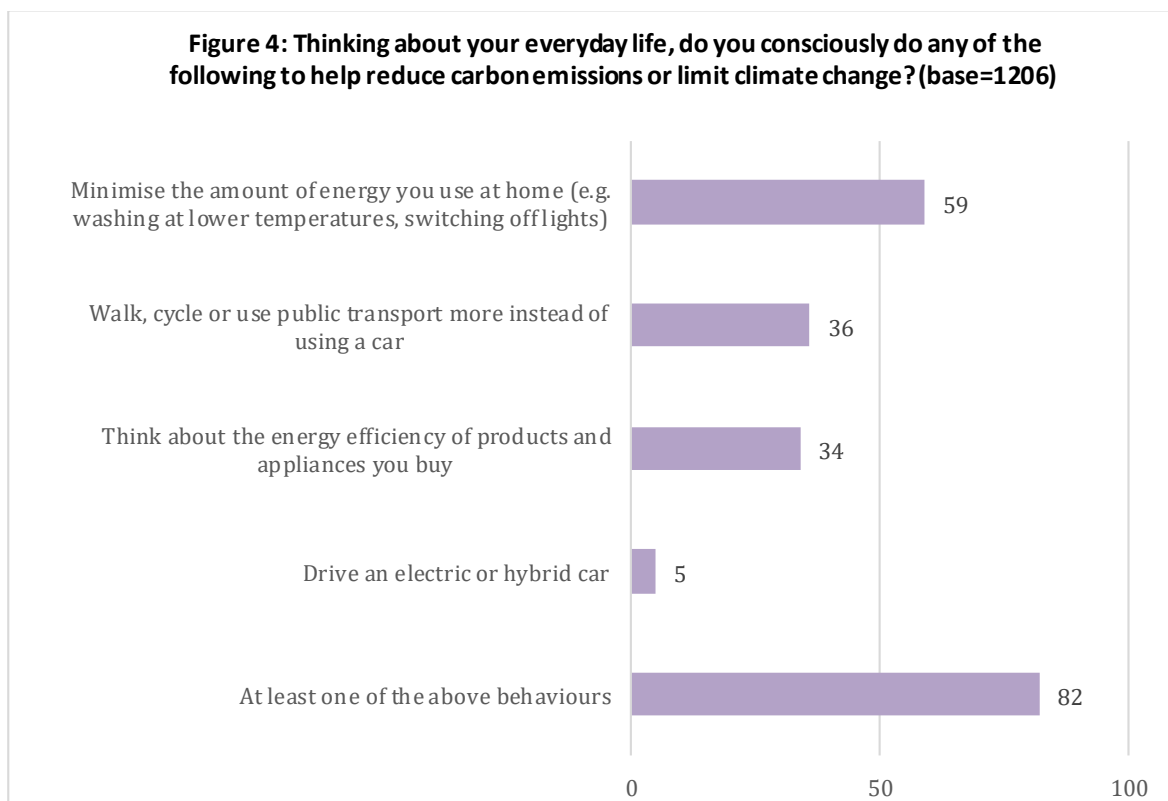
- Men (32% vs. 19%)
- Higher social bands (ABC1, 34%: C2DE, 18%)
- Higher level of educational attainment (low, 13%: medium, 20%; high, 38%)

2.4 Consumer Behaviour to Help Reduce Carbon Emissions

Consumers were presented with a range of everyday life behaviours and asked if they consciously did any to help reduce carbon emissions or limit climate change.

Figure 4 shows that more than half (59%) said they '*minimise the amount of energy they use at home (e.g. washing at lower temperatures, switching off lights)*', with similar numbers saying they '*walk, cycle or use public transport more instead of using a car*' (36%) or '*think about the energy efficiency of products and appliances you buy*' (34%).

Relatively few (5%) consumers reported driving an electric or hybrid car, with the overwhelming majority (82%) of consumers reporting at least one of the behaviours listed in Figure 4.



Differences between Consumer Groups (statistically significant)

More likely to mention **minimising the amount of energy you use at home (e.g. washing at lower temperatures, switching off lights)**

- Consumers aged under 60 (16-34, 58%: 35-59, 64%: 60+, 52%)
- Higher social bands (ABC1, 68%: C2DE, 52%)
- Higher level of educational attainment (low, 44%: medium, 57%; high, 72%)
- Consumers in the West (North, 67%: South, 48%: East, 59%: West, 72%)

More likely to mention **walking, cycling, or using public transport more instead of using a car**

- Younger consumers (16-34, 42%: 35-59, 37%: 60+, 29%)
- Higher social bands (ABC1, 47%: C2DE, 28%)
- Higher level of educational attainment (low, 32%: medium, 28%; high, 49%)

More likely to mention **thinking about the energy efficiency of products and appliances you buy**

- Consumers aged under 60 (16-34, 33%: 35-59, 39%: 60+, 28%)
- Higher social bands (ABC1, 46%: C2DE, 24%)
- Higher level of educational attainment (low, 14%: medium, 32%; high, 49%)
- Consumers living in rural areas (urban, 32%: rural, 39%)
- Consumers in the areas other than the South (North, 35%: South, 26%: East, 40%: West, 36%)

More likely to mention **driving an electric or hybrid car**

- Men (7% vs. 3%)
- Higher social bands (ABC1, 7%: C2DE, 3%)
- Higher level of educational attainment (low, 2%: medium, 3%; high, 9%)
- Consumers in the North (North, 7%: South, 5%: East, 5%: West, 1%)

More likely to **do something to consciously help reduce carbon emissions or limit climate change**

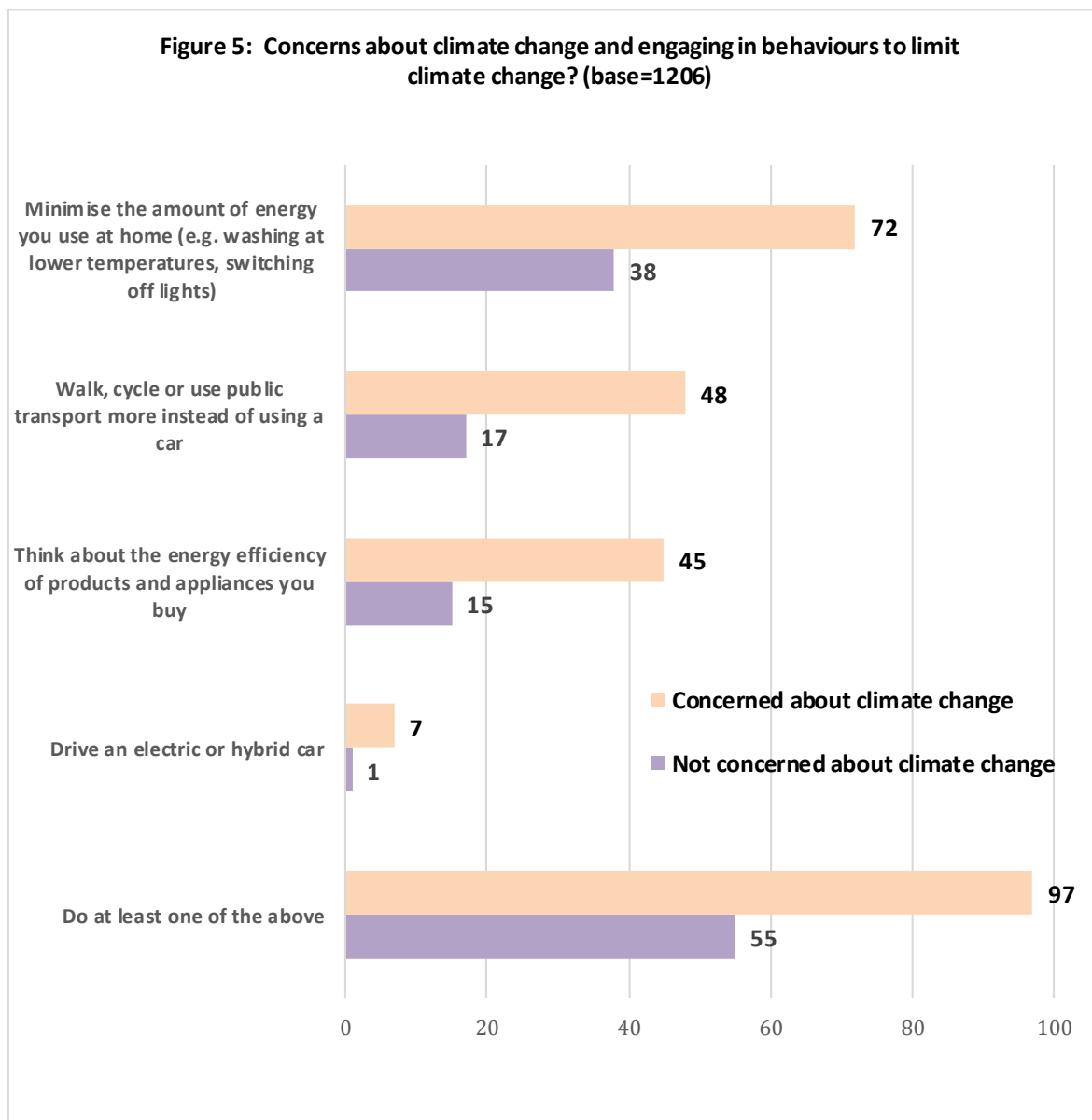
- Men (84% vs. 80%)
- Consumers aged under 60 (16-34, 81%: 35-59, 88%: 60+, 73%)
- Higher social bands (ABC1, 92%: C2DE, 74%)
- Higher level of educational attainment (low, 69%: medium, 80%; high, 92%)
- Consumers in areas other than the South (North, 85%: South, 77%: East, 84%: West, 83%)

2.4.1 Consumer Behaviour and Concerns About Climate Change

Those concerned about climate change were significantly more likely to say they engage in behaviours to limit climate change.

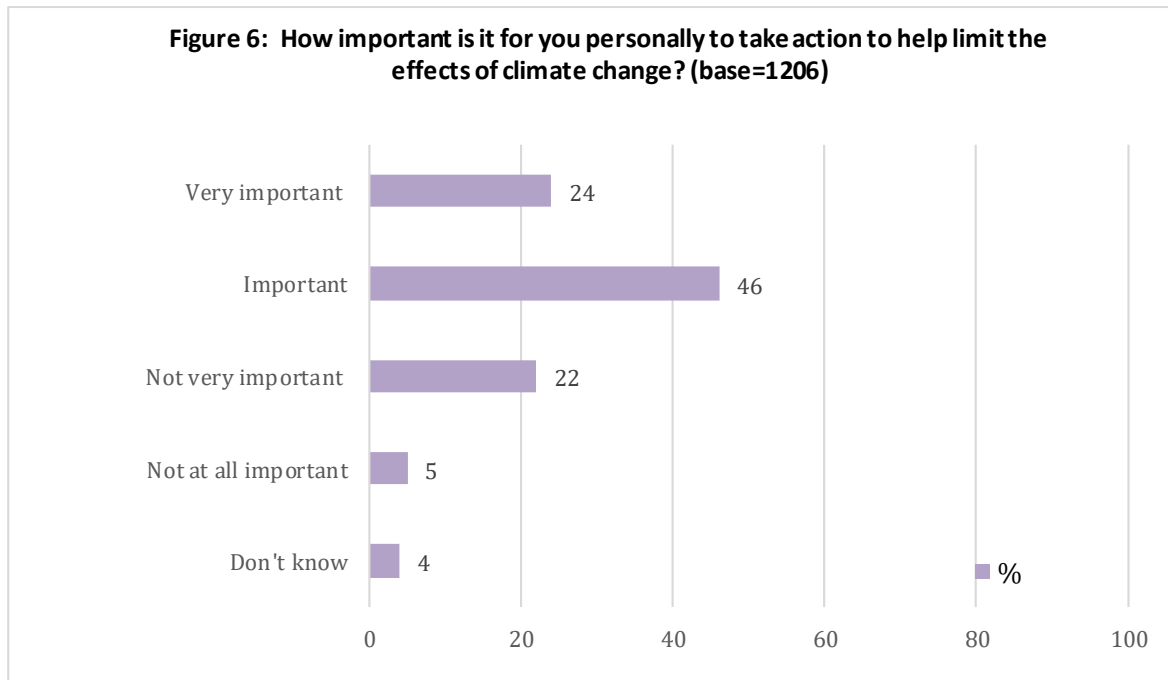
For example, those concerned about climate change were more likely to say they minimise the amount of energy used in their homes (72% vs. 38%), with the same true for walking, cycling or using public transport more instead of using a car (48% vs. 17%).

Consumers concerned about climate change were also more likely to think about energy efficiency of products and appliances they buy (45% vs. 15%), and drive an electric or hybrid car (7% vs. 1%). Indeed almost all of those concerned about climate change engaged in at least one of the behaviours listed in Figure 5 (97% vs. 55%).



2.4.2 Personally Taking Action to Limit Climate Change

Seven out of ten (70%) consumers said that it is important for them personally to take action to help limit the effects of climate change (*'very important'*, 24%; *'important'*, 46%), with 27% saying it is not important (*'not very important'*, 22%; *'not at all important'*, 5%). Four percent were undecided.



Differences between Consumer Groups (statistically significant)

Consumers **more likely to say it is important for them personally to take action to limit climate change** included:

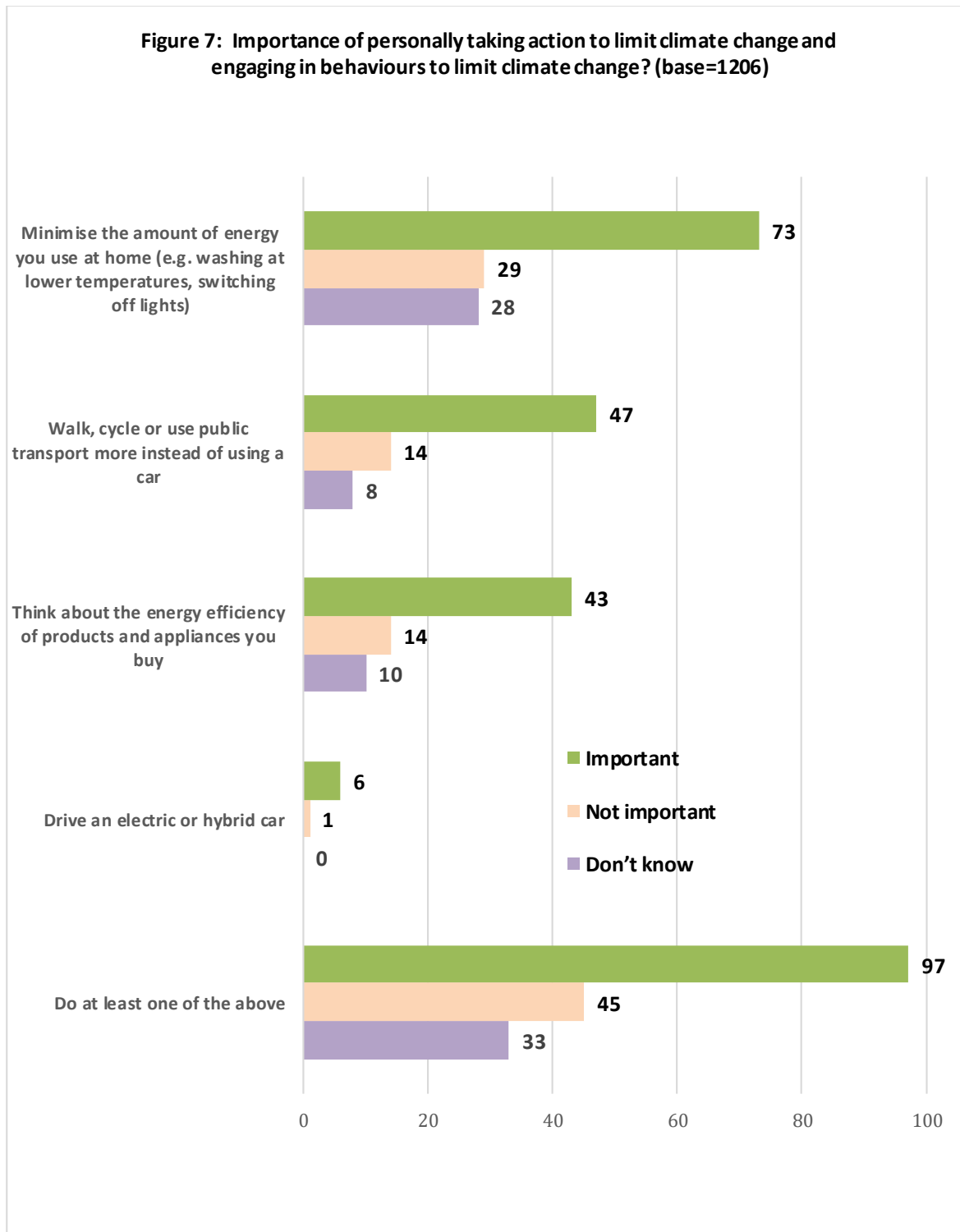
- Consumers aged under 60 (16-34, 72%; 35-59, 75%; 60+, 56%)
- Consumers in higher social bands (ABC1, 85%; C2DE, 56%)
- Consumers with a higher level of educational attainment (low, 53%; medium, 65%; high, 85%)
- Consumers in the North (North, 79%; South, 65%; East, 66%; West, 70%)
- Those who are concerned about climate change (89%)

Consumers **less likely to say it is important for them personally to take action to limit climate change** included:

- Older consumers (16-34, 24%; 35-59, 22%; 60+, 37%)
- Consumers in lower social bands (ABC1, 13%; C2DE, 38%)
- Those with a lower level of educational attainment (low, 39%; medium, 31%; high, 14%)
- Consumers in the South (North, 17%; South, 32%; East, 28%; West, 27%)
- Those unconcerned about climate change (11%)

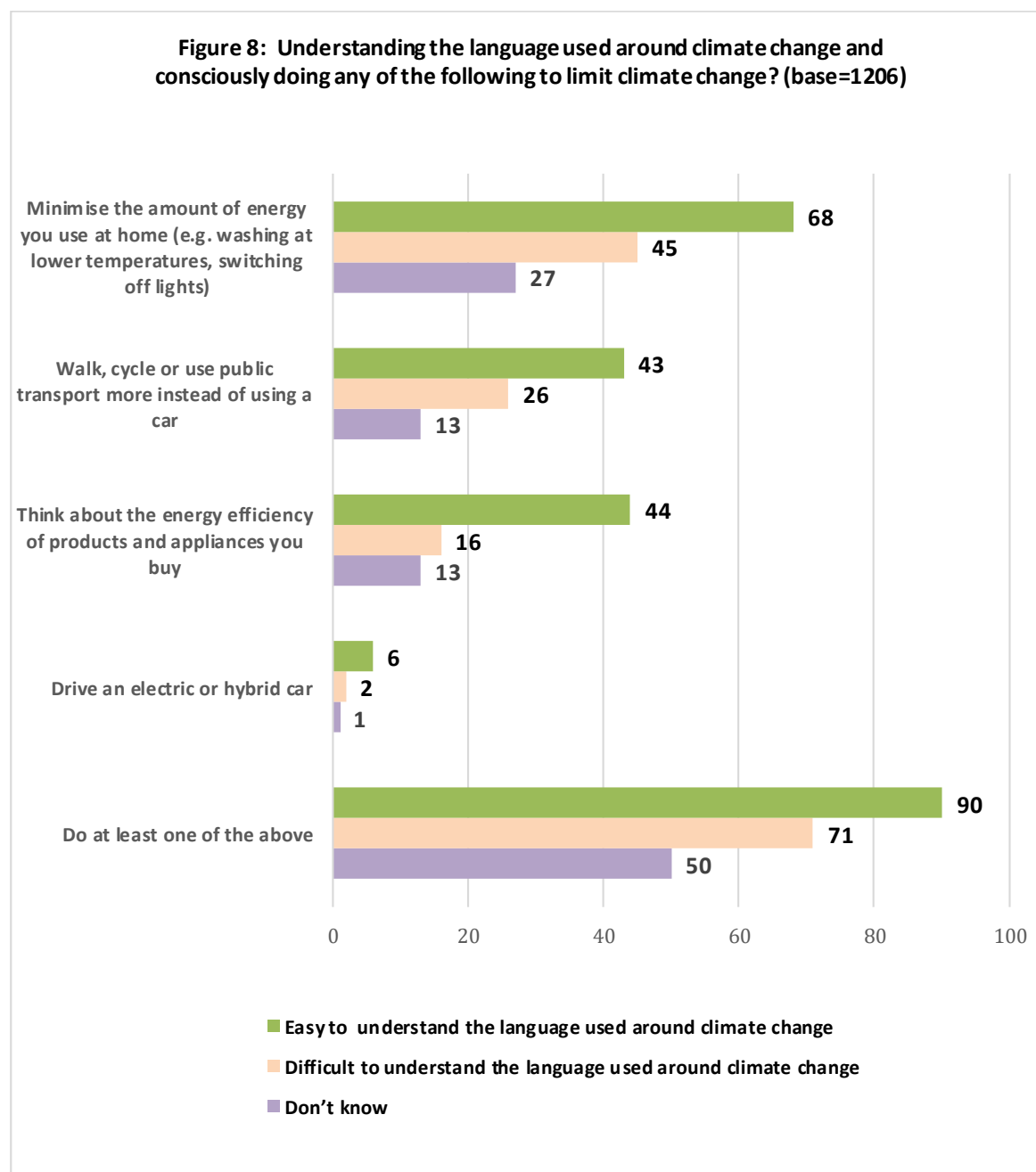
2.4.3 Personally Taking Action to Limit Climate Change and Behaviours

Figure 7 shows that consumers who believe it is important for them personally to take action to help limit the effects of climate change were more likely to engage in a range of behaviours to limit climate change (e.g. 73% minimise the amount of energy they use in their home compared with 29% who believe it is not important to personally take action to limit climate change).



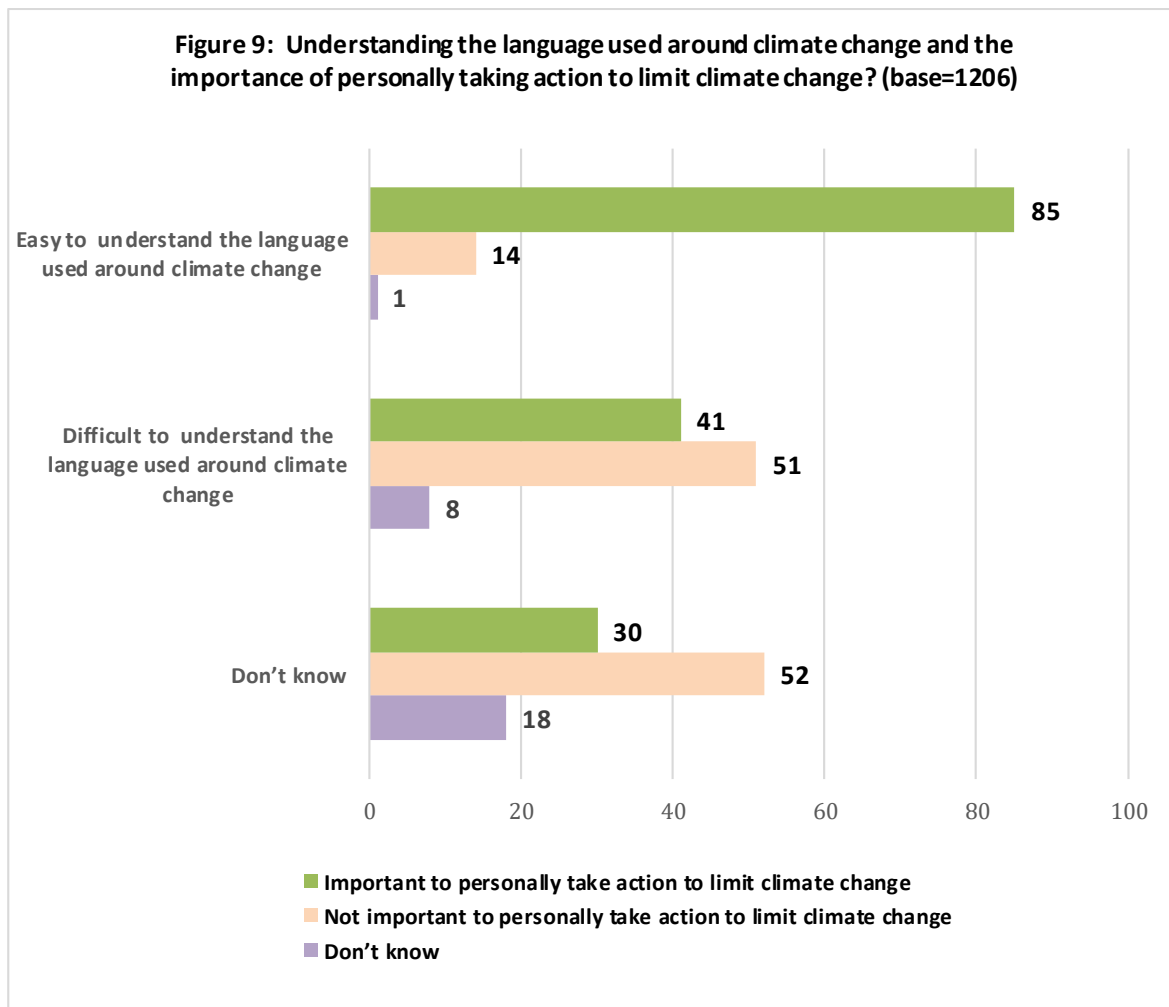
2.4.4 Consumer Behaviour and Language Used Around Climate Change

Figure 8 shows that consumers who say they find it easy to understand the language used around climate change are more likely to engage in behaviours which limit climate change (e.g. 43% of those who said it is easy to understand the language used around climate change engage in walking, cycling, or using public transport compared with 26% of those who find the language used around climate change difficult).



2.4.5 Language Used and Taking Action to Limit Climate Change

Figure 9 shows that consumers who say they find it easy to understand the language used around climate change are more likely to say it is important to personally take action to limit climate change (85%). This compares with 41% of those who find it difficult to understand the language used.



2.5 Conclusions / Recommendations: Knowledge and Behaviour

- Although a majority of consumers are concerned about climate change, the survey shows that a significant number are unconcerned, with this group more likely to be older, in lower social bands and those with a lower level of educational attainment. It is these consumers who find it difficult to understand the language used around climate change, and who report lower levels of awareness of the main sources of greenhouse gas emissions.
- The survey has also found a significant association between consumer awareness and knowledge of climate change, and behaviours consistent with reducing carbon emissions. More knowledgeable consumers are more likely to report positive behaviours in terms of reducing carbon emissions, with the inverse true for those less knowledgeable.
- Given the linkages between consumer knowledge and behaviour, the challenge will be to target those groups (*e.g. older consumers, those with a lower level of educational attainment etc.*) with interventions which communicate the impact of climate change, improve knowledge and stimulate positive behaviour change. Transport was cited by the majority of consumers as a factor in contributing to carbon emissions, with relatively fewer consumers citing other contributing factors, particularly agriculture, which is the largest source of carbon emissions in Northern Ireland. This mismatch in terms of the main contributors to climate change in Northern Ireland⁸, could be an element within any future public information campaign aimed at raising awareness.
- Consideration should be given to developing a public information campaign aimed at raising consumer awareness and understanding of issues around climate change. This campaign should be targeted at those groups which the research has shown to have lower levels of awareness and understanding (*e.g. those with a lower level of educational attainment, older consumers, those in lower social bands etc.*).

⁸ Agriculture is the largest contributor to carbon emissions in Northern Ireland, followed by transport, power generation, energy use in residential buildings, industry, waste, and energy use in non-residential buildings – source: Reducing Emissions in Northern Ireland, Climate Change Committee, 2019 ([Reducing emissions in Northern Ireland - Climate Change Committee \(theccc.org.uk\)](https://theccc.org.uk/reducing-emissions-in-northern-ireland/))

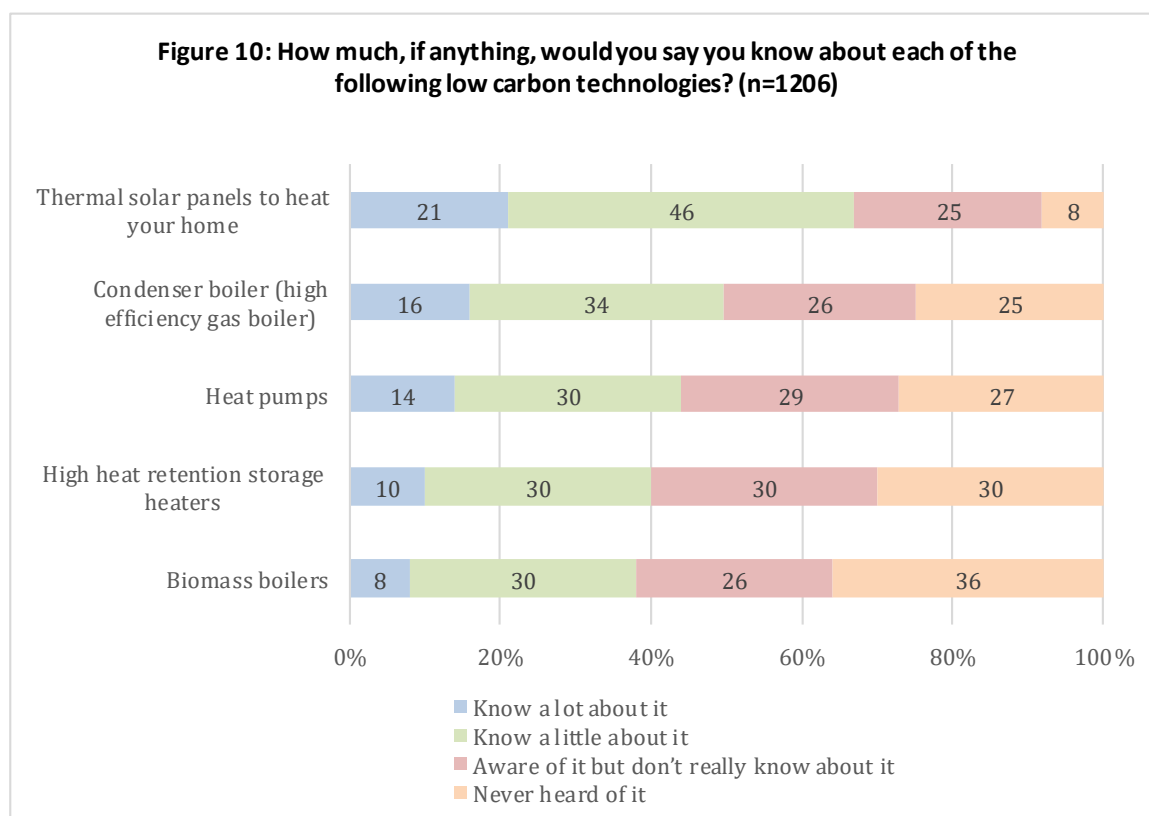
3. Low Carbon Technologies

3.1 Consumer Awareness of Different Types of LCT

Consumers were presented with a list of low carbon technologies and asked how much, if anything, they know about each.

Figure 10 shows that consumers were most likely (67%) to know about thermal solar panels (*'know a lot'*, 21%; *'know a little'*, 46%), and least likely (38%) to know about biomass boilers (*'know a lot'*, 8%; *'know a little'*, 30%)

Consumers were most likely to have heard of thermal solar panels (92%) and least likely to have heard of biomass boilers (64%).



Differences between Consumer Groups (statistically significant)

More likely to 'know a lot' or 'know a little' about: **thermal solar panels to heat your home**

- Men (80% vs. 54%)
- Consumers aged 35-59 (16-34, 61%; 35-59, 74%; 60+, 59%)
- Consumers in higher social bands (ABC1, 77%; C2DE, 57%)
- Consumers with a higher level of educational attainment (low, 51%; medium, 61%; high, 82%)
- Those living in rural areas (72% vs. 64%)
- Consumers in the South (North, 63%; South, 75%; East, 67%; West, 52%)

More likely to 'know a lot' or 'know a little' about: **condenser boilers (high efficiency gas boiler)**

- Men (67% vs. 34%)
- Consumers aged 35-59 (16-34, 42%: 35-59, 56%: 60+, 45%)
- Consumers in higher social bands (ABC1, 60%: C2DE, 40%)
- Consumers with a higher level of educational attainment (low, 35%: medium, 45%: high, 63%)
- Consumers in the East (North, 45%: South, 50%: East, 54%: West, 42%)
- Consumers using non-electric heating sources (oil, 51%: gas, 51%: electric, 36%, other, 51%)

More likely to 'know a lot' or 'know a little' about: **heat pumps**

- Men (63% vs. 27%)
- Consumers aged 35-59 (16-34, 37%: 35-59, 51%: 60+, 58%)
- Consumers in higher social bands (ABC1, 53%: C2DE, 36%)
- Consumers with a higher level of educational attainment (low, 26%: medium, 37%: high, 62%)
- Those living in rural areas (50% vs. 41%)
- Consumers using non-electric heating sources (oil, 46%: gas, 45%: electric, 29%, other, 42%)

More likely to 'know a lot' or 'know a little' about: **high heat retention storage heaters**

- Men (59% vs. 25%)
- Consumers aged 35-59 (16-34, 32%: 35-59, 47%: 60+, 38%)
- Consumers in higher social bands (ABC1, 51%: C2DE, 32%)
- Consumers with a higher level of educational attainment (low, 28%: medium, 35%: high, 54%)
- Those living in rural areas (47% vs. 37%)
- Those living in areas where natural gas is unavailable (45% vs. 38%)

More likely to 'know a lot' or 'know a little' about: **biomass boilers**

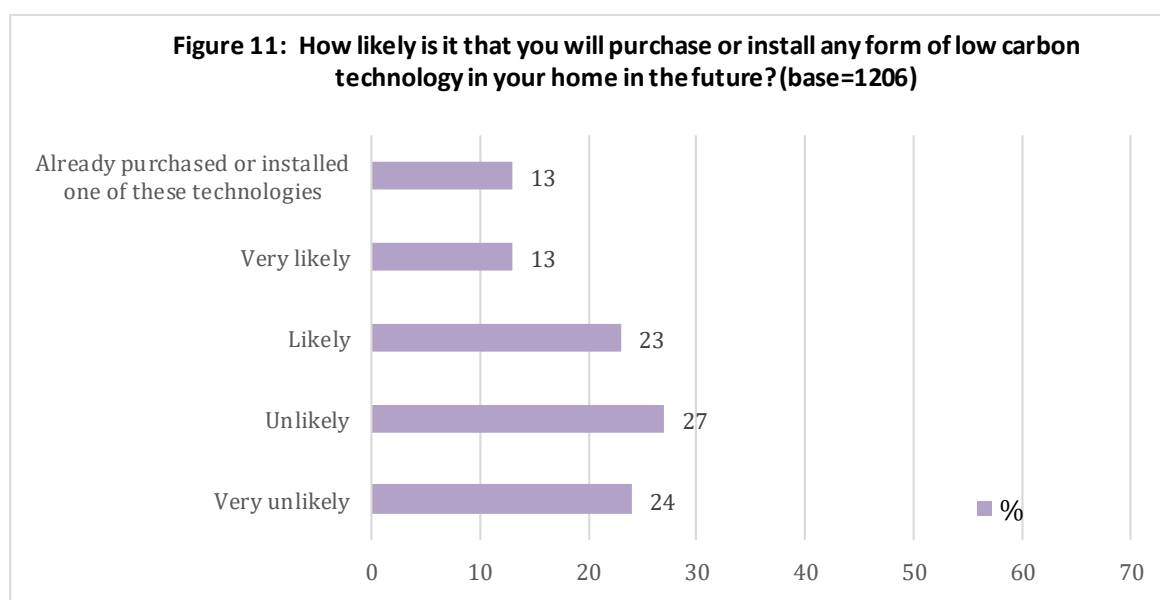
- Men (57% vs. 22%)
- Consumers aged 35-59 (16-34, 34%: 35-59, 45%: 60+, 30%)
- Consumers in higher social bands (ABC1, 48%: C2DE, 30%)
- Consumers with a higher level of educational attainment (low, 23%: medium, 31%: high, 55%)
- Those living in rural areas (46% vs. 34%)
- Those living in areas where natural gas is unavailable (43% vs. 36%)

3.2 Likelihood of Purchasing or Installing Low Carbon Technology

Having been presented with a list of examples of low carbon technologies, consumers were asked how likely is it that they will purchase or install any form of low carbon technology in their home in the future.

Figure 11 shows that 13% of consumers said they had already purchased or installed one of the low carbon technologies listed, with 36% saying they would be likely to purchase or install one ('very likely', 13%; 'likely', 23%).

Just over half (51%) of consumers said they would be unlikely to purchase or install one of the low carbon technologies listed ('unlikely', 27%; 'very unlikely', 24%).



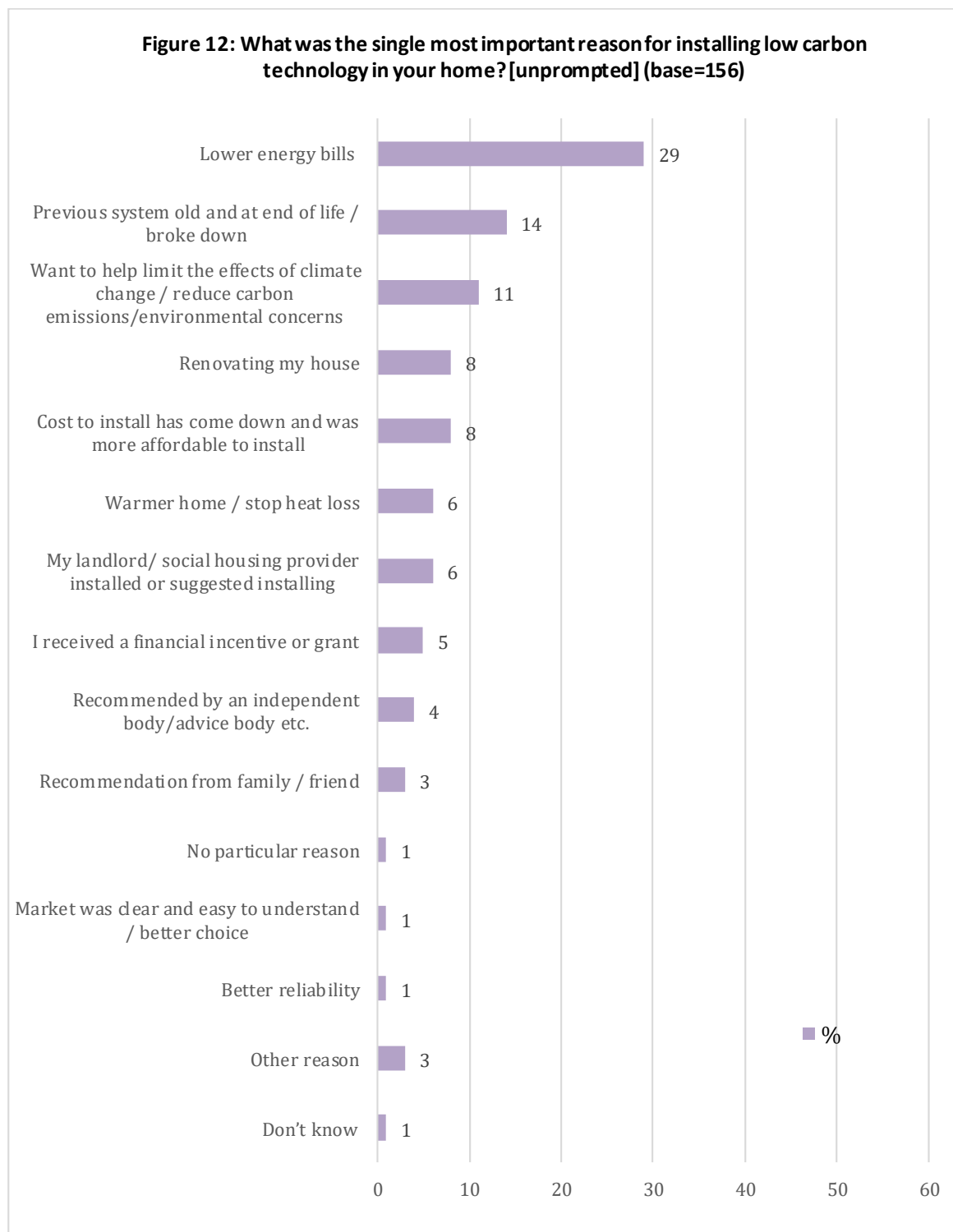
Differences between Consumer Groups (statistically significant)

- Men (18% vs. 8%) were more likely to say they have purchased or installed low carbon technology, with men also proportionately more likely to say they would purchase or install one in the future (40% vs. 32%). A greater proportion of women said they would be unlikely to purchase or install low carbon technology in the future (59% vs. 42%)
- Consumers aged 35-59 (16-34, 10%; 35-59, 16%; 60+, 11%) were more likely to say they have purchased or installed a LCT, with this group also more likely to say they will do in the future (16-34, 38%; 35-59, 41%; 60+, 24%). A majority of older consumer said they would be unlikely to purchase or install low carbon technology (16-34, 52%; 35-59, 43%; 60+, 65%)
- ABC1 consumers (20% vs. 7%) were more likely to say they have purchased or installed low carbon technology, with ABC1 consumers also proportionately more likely to say they would purchase or install low carbon technology in the future (50% vs. 24%). A majority of C2DE consumers said they would be unlikely to do so (68% vs. 31%)

- Consumers with a higher level of educational attainment (low, 6%: medium, 10%: high, 21%) were more likely to say they have purchased or installed a LCT, with this group also more likely to say they will do so in the future (low, 18%: medium, 34%: high, 49%). A majority of those with a lower level of educational attainment said they would be unlikely to purchase or install low carbon technology in the future (low, 77%: medium, 57%: high, 30%)
- Consumers living in rural areas (41% vs. 34%) were more likely to say they will purchase or install low carbon technology in the future whereas more consumers living in urban areas said they would be unlikely to do so (54% vs. 46%)
- Consumers in the West were least likely to say they have purchased or installed low carbon technology (North, 18%: South, 13%: East, 14%: West, 2%), with a greater number of those in the West saying they are unlikely to do so in the future (North, 50%: South, 50%: East, 49%: West, 61%)
- A greater proportion of consumers using electricity as their main energy source to heat their homes said they would be unlikely to purchase or install low carbon technology in the future (oil, 53%: gas, 45%: electric, 61%, other, 51%)
- Owner occupiers were more likely to say they have purchased or installed low carbon technology (owner occ. 18%: NIHE, 6%: private rented, 2%: housing association, 4%), with a greater number of those in private rented accommodation saying they would be unlikely to purchase or install low carbon technology in the future (owner occ. 39%: NIHE, 69%: private rented, 86%: housing association, 74%)
- Consumers on higher incomes more likely to say they have purchased or installed low carbon technology (≤£20K, 5%: £20K-£40K, 17%: >£40K, 37%), with a majority of those on low incomes saying they would be unlikely to purchase or install an LCT in the future (≤£20K, 80%: £20K-£40K, 42%: >£40K, 18%)
- Those living in households in receipt of Universal Credit were less likely to say they have purchased or installed low carbon technology (6% vs. 15%), with a majority of this group saying they are unlikely to purchase or install an LCT in the future (76% vs. 45%)
- Those concerned about climate change were significantly more likely to say they have or will be likely to install or purchase an LCT in the future (65% vs. 35%), with a greater number of those not concerned about climate change saying they will be unlikely to do so in the future (80% vs. 35%)
- Those who believe it is important to personally take action to limit climate change were significantly more likely to say they have or will be likely to install or purchase an LCT (62%) in the future. This compares to 20% of those who say it is not important to personally take action to limit climate change

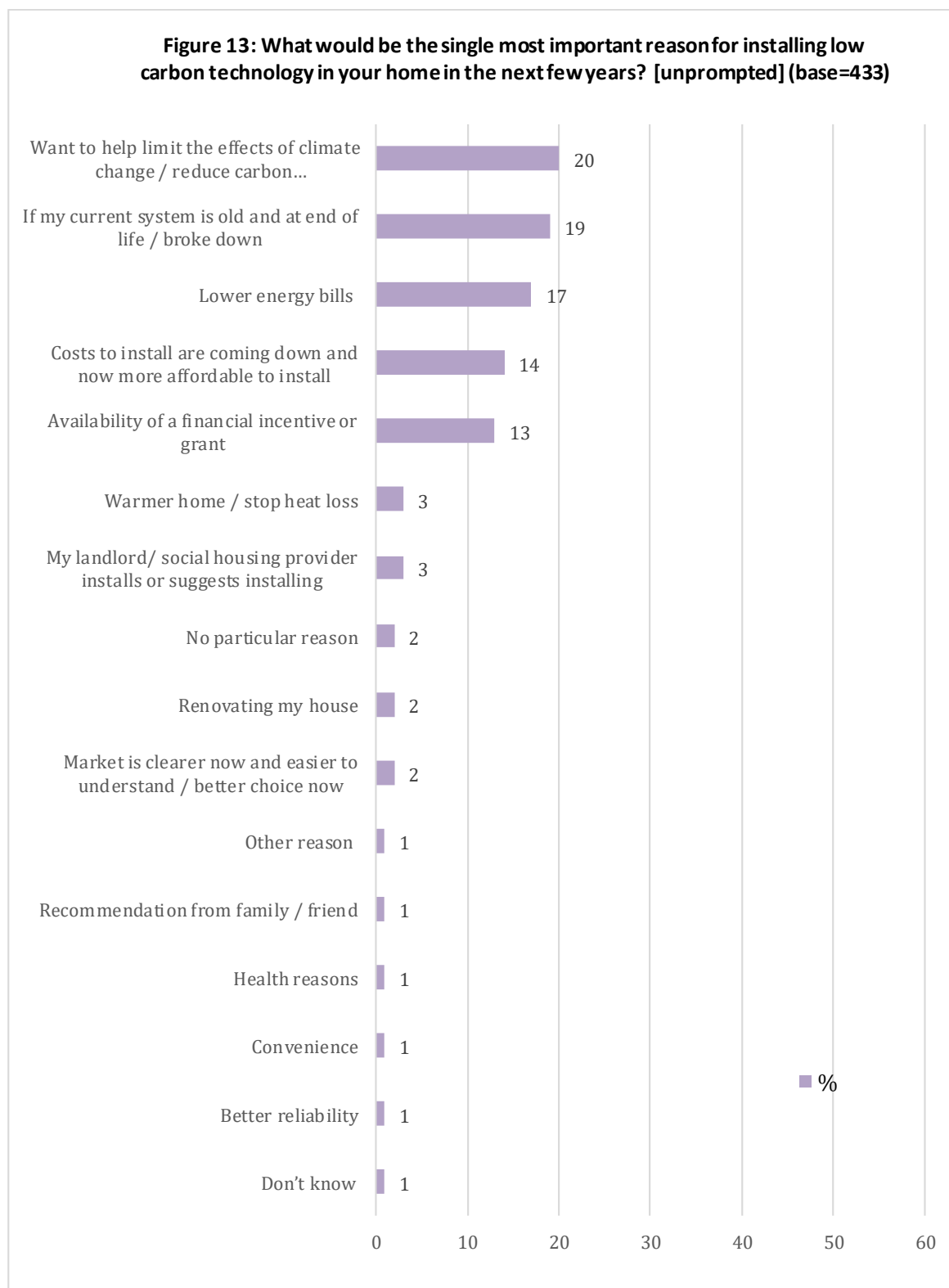
3.3 Reasons Already Installed or Purchased LCT (Unprompted)

Among consumers (n=156) who had already purchased or installed low carbon technology in their home, the single most important reason for doing so was lower energy bills (29%), with 14% saying their previous system was old, at end of life, or had broken down. Approximately one in ten consumers (11%) cited wanting to limit the effects of climate change as their main reason for purchasing or installing low carbon technology.



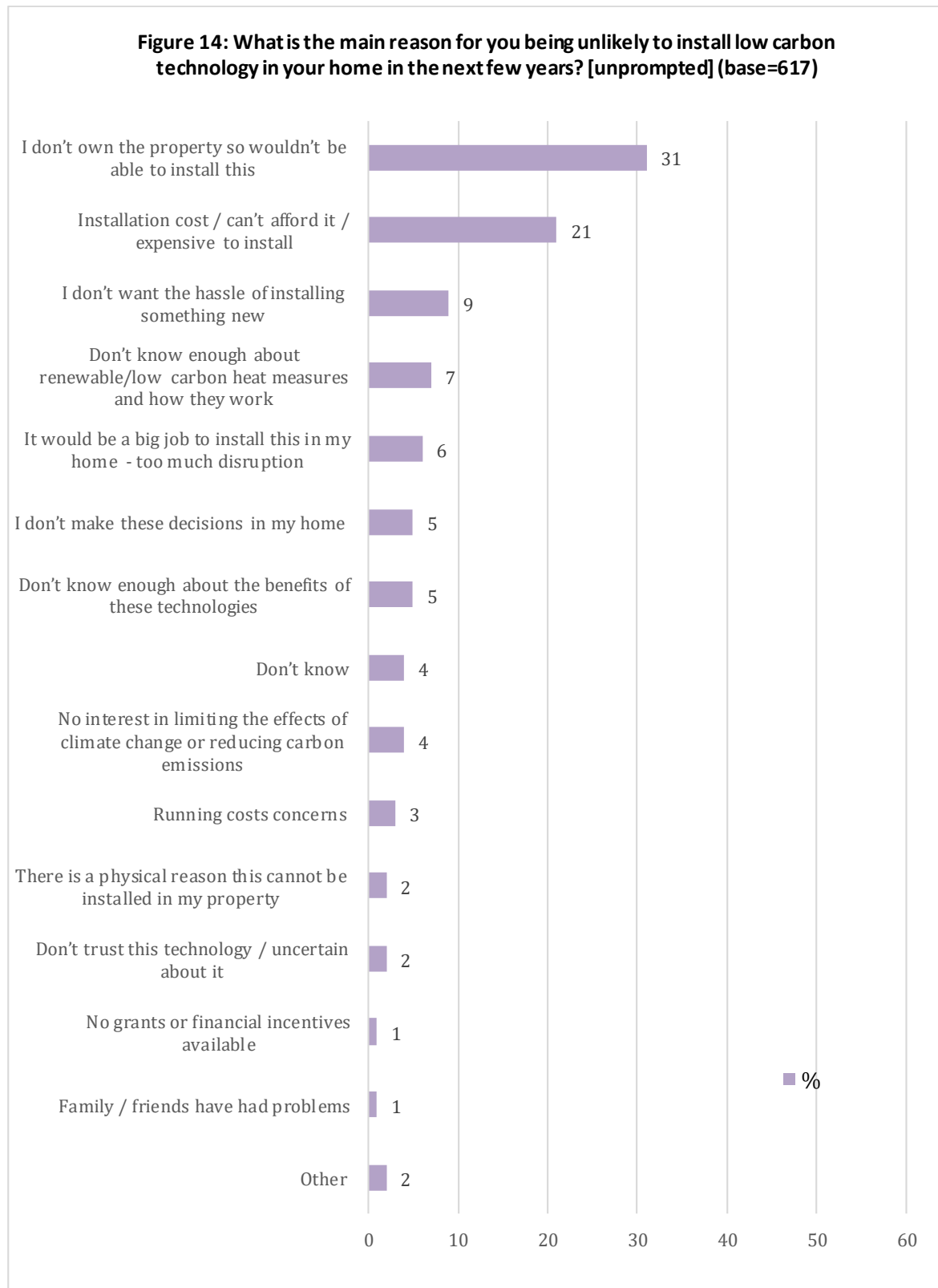
3.4 Reasons Likely to Install or Purchase LCT (Unprompted)

Among consumers (n=433) who said they would be likely to purchase or install low carbon technology in their home in the future, the single most important reason for doing so was wanting to limit the effects of climate change (20%), with 19% saying they would do so if their current system was old, at end of life, or breaks down. 17% of consumers cited lower energy bills.



3.5 Reasons for being Unlikely to Install or Purchase LCT (Unprompted)

Among consumers (n=617) who said they would be unlikely to purchase or install low carbon technology in their home in the future, the single most important reason for not doing so was not owning the property they live in (31%). Installation costs / affordability was cited by 21%, and not wanting the hassle cited by 9% of these consumers.

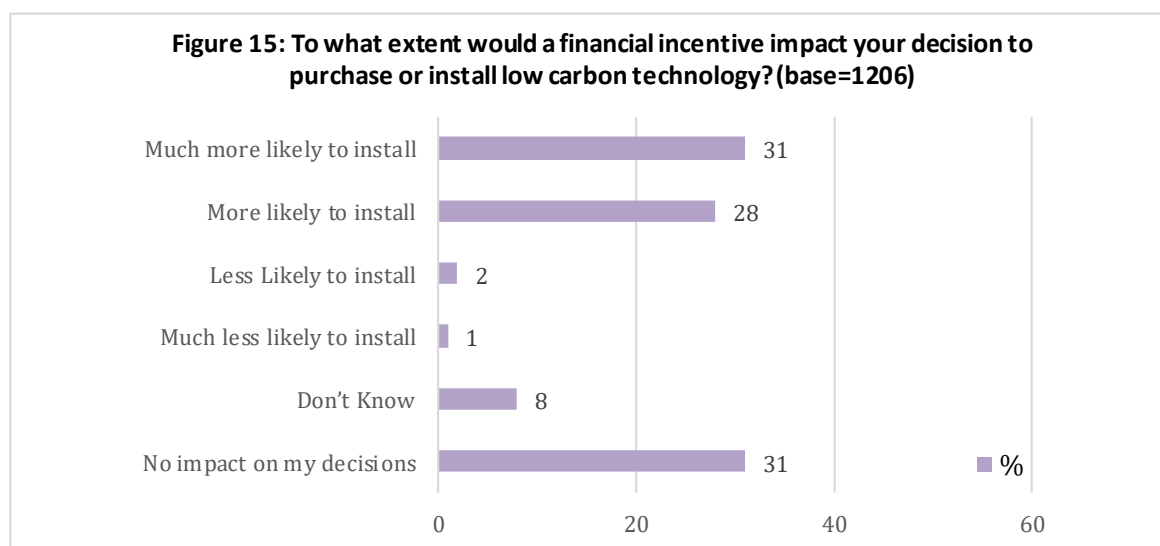


3.6 Financial Incentive and Purchasing / Installing LCT

Consumers were asked to what extent a financial incentive would impact on their decision to purchase or install low carbon technology in their home.

Figure 15 shows that more than half (59%) of consumers said that a financial incentive would make them more likely to install low carbon technology ('much more likely', 31%; 'more likely', 28%).

Just 3% said a financial incentive would make them less likely to install low carbon technology ('less likely', 2%; 'much less likely', 1%), with 8% answering, 'don't know'. Approximately three in ten (31%) said that a financial incentive would not impact on their decision.



Differences between Consumer Groups (statistically significant)

Consumers who said a financial incentive would be **more likely** to encourage them to install low carbon technology included (note that those who answered 'don't know' have been excluded from this sub analysis):

- Men (71% vs. 57%)
- Consumers aged 35-59 (16-34, 58%; 35-59, 74%; 60+, 51%)
- Consumers in higher social bands (ABC1, 80%; C2DE, 49%)
- Consumers with a higher level of educational attainment (low, 39%; medium, 62%; high, 78%)
- Those living in rural areas (70% vs. 60%)
- Those living in areas where natural gas is unavailable (68% vs. 62%)
- Those with gas as main energy source for heating (oil, 62%; gas, 70%; electric, 51%, other, 59%)
- Higher income consumers (=<£20K, 37%; £20K-£40K, 78%; >£40K, 89%)
- Consumers not in receipt of Universal Credit (72% vs. 34%)
- Consumers concerned about climate change (79% vs. 36%)
- Consumers who say they find it easy to understand the language used around climate change (73% vs. 45%)
- Those who say it is important for them personally to take action to reduce their carbon emissions (76% vs. 38%)

Consumers who said that a financial incentive **would not impact on their decision** to install low carbon technology were more likely to include:

- Women (40% vs. 26%)
- Older consumers (16-34, 40%: 35-59, 23%: 60+, 45%)
- Consumers in lower social bands (ABC1, 18%: C2DE, 47%)
- Those with a lower level of educational attainment (low, 58%: medium, 35%: high, 19%)
- Those living in urban areas (36% vs. 29%)
- Those living in areas where natural gas is available (36% vs. 30%)
- Those using electricity to heat their home (oil, 34%: gas, 27%: electric, 50%, other, 38%)
- Consumers living in private rented accommodation (owner occup. 18%: NIHE, 47%: private rented, 81%: housing association, 60%)
- Lower income consumer (= \pounds 20K, 62%: \pounds 20K- \pounds 40K, 21%: $>\pounds$ 40K, 11%)
- Consumers in receipt of Universal Credit (61% vs. 26%)
- Consumers unconcerned about climate change (58% vs. 20%)
- Consumers who say they find it difficult to understand the language used around climate change (46% vs. 26%)
- Those who say it is not important for them personally to take action to reduce their carbon emissions (56% vs. 23%)

3.7 Conclusions and Recommendations: Low Carbon Technology

- Although the survey shows that most consumers have heard of the different forms of low carbon technology, beyond thermal solar panels knowledge of most forms of low carbon technology is low. These findings will provide a useful baseline as Northern Ireland moves forward on its energy transition journey and seeks to achieve net zero by 2050.
- As with general consumer knowledge and understanding of climate change, knowledge of the different forms of low carbon technology differs across consumer groups, with knowledge levels higher among those in higher social bands and those with a higher level of educational attainment. Also with the sole exception of condenser boilers, awareness of the different types of low carbon technology is higher in rural areas, which may reflect lack of accessibility to the alternative energy such as natural gas.
- Limited knowledge of low carbon technology is also reflected in the relatively low uptake of low carbon technology, but even more concerning is that just over a third of consumers said they would be likely to install or purchase low carbon technology, with a slight majority saying they are unlikely to do so.
- The evidence shows that lower energy bills and systems becoming old and at end of life were the most common reasons why consumers have made the change to low carbon technology. However, the survey does provide evidence that consumers are mindful of the impact of climate change, with wanting to limit the effects of climate change identified as the most common motivator in encouraging consumers to purchase or install low carbon technology, with current systems at end of life, and lower energy bills, also among the most common motivating factors.
- Among those unlikely to purchase or install low carbon technology the most common barrier is consumers not owning their own home. This is a significant inhibitor to change given the growth of Northern Ireland's private rented sector in recent years. Also a significant portion of the Northern Ireland housing stock is in public ownership. Both these factors mean that policy interventions to reduce carbon emissions will also need to target not only individual consumers, but also other stakeholders (*e.g. private landlords, Northern Ireland Housing Executive etc.*). It is recommended that future policy also target stakeholders, beyond individual consumers, to help reduce carbon emissions.
- The value of a financial incentive as a potentially effective policy response to stimulating positive behaviour in terms of consumer expenditure on low carbon technology, is borne out in the survey. However, a significant number of consumers say that a financial incentive will have no impact on their decision, with this group more likely to be characterised by older consumers, those on lower incomes, those living in private rented sector accommodation etc. Again, this ties in with the previous point on the need to not only target individual behaviour change but also a need to consider alternative policy responses. It is recommended that the value of financial incentives be further explored, as

well as the effectiveness of linking these with key trigger points such as when old heating systems reach end of life.

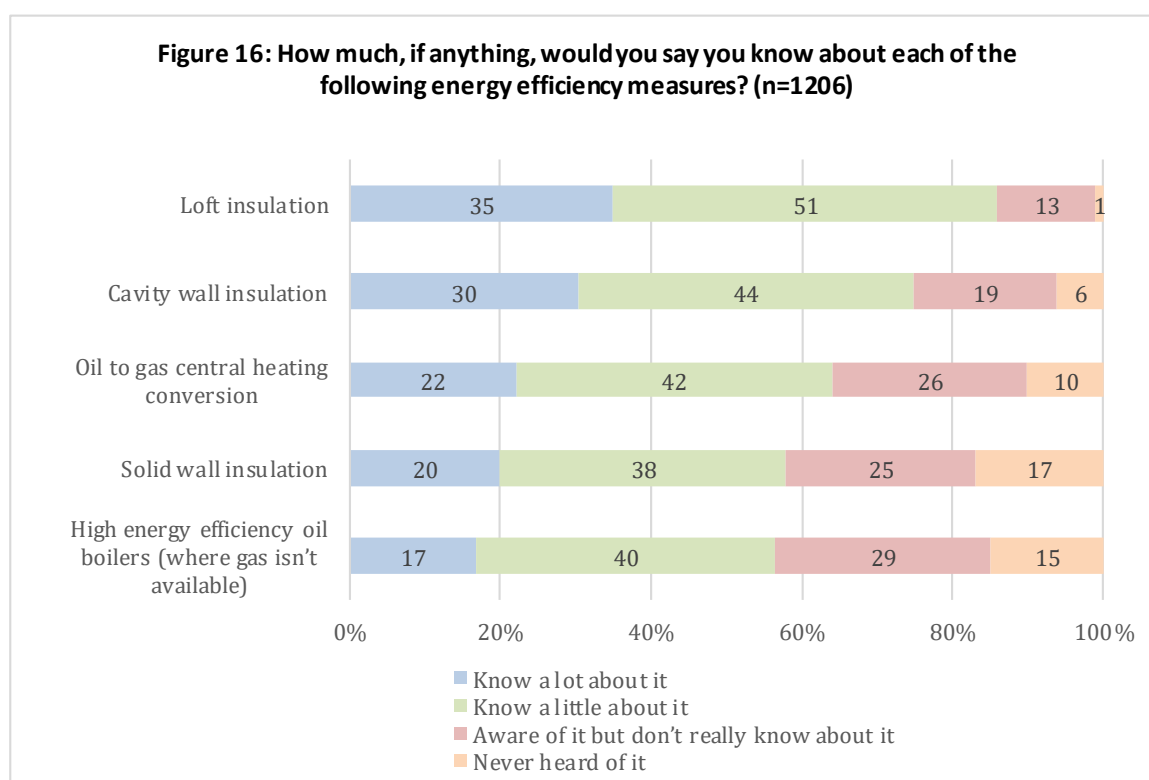
4. Energy Efficiency Measures

4.1 Consumer Awareness of Different Energy Efficiency Measures

Consumers were presented with a list of energy efficiency measures and asked how much, if anything, they know about each.

Figure 16 shows that consumers were most likely (86%) to know about loft insulation ('know a lot', 35%; 'know a little', 51%), and least likely (57%) to know about high energy efficient boilers ('know a lot', 17%; 'know a little', 40%)

Consumers were most likely to have heard of loft insulation (99%), and least likely to have heard of energy efficient boilers (85%).



Differences between Consumer Groups (statistically significant)

More likely to 'know a lot' or 'know a little' about: **loft insulation**

- Men (91% vs. 81%)
- Consumers aged 35-59 (16-34, 84%; 35-59, 91%; 60+, 80%)
- Consumers in higher social bands (ABC1, 92%; C2DE, 81%)
- Consumers with a higher level of educational attainment (low, 79%; medium, 84%; high, 92%)
- Those living in rural areas (91% vs. 84%)
- Consumers using non-electric heating sources (oil, 86%; gas, 88%; electric, 76%, other, 93%)
- Consumers in the North and South (North, 88%; South, 88%; East, 85%; West, 81%)

- Owner occupiers (owner occ. 90%: NIHE, 69%: private rented, 71%: housing association, 84%)
- Higher income consumers (=<£20K, 77%: £20K-£40K, 96%: >£40K, 94%)
- Consumers living in households not in receipt of Universal Credit (90% vs. 74%)

More likely to 'know a lot' or 'know a little' about: **cavity wall insulation**

- Men (86% vs. 64%)
- Consumers aged 35-59 (16-34, 68%: 35-59, 82%: 60+, 68%)
- Consumers in higher social bands (ABC1, 84%: C2DE, 67%)
- Consumers with a higher level of educational attainment (low, 64%: medium, 72%: high, 84%)
- Those living in rural areas (80% vs. 72%)
- Consumers using non-electric heating sources (oil, 77%: gas, 75%: electric, 57%, other, 84%)
- Owner occupiers (owner occ. 83%: NIHE, 46%: private rented, 50%: housing association, 66%)
- Higher income consumers (=<£20K, 59%: £20K-£40K, 86%: >£40K, 87%)
- Consumers living in households not in receipt of Universal Credit (81% vs. 56%)

More likely to 'know a lot' or 'know a little' about: **solid wall insulation**

- Men (74% vs. 44%)
- Consumers aged 35-59 (16-34, 51%: 35-59, 65%: 60+, 52%)
- Consumers in higher social bands (ABC1, 67%: C2DE, 50%)
- Consumers with a higher level of educational attainment (low, 46%: medium, 54%: high, 69%)
- Those living in rural areas (65% vs. 55%)
- Consumers in the East (North, 47%: South, 60%: East, 64%: West, 55%)
- Consumers using non-electric heating sources (oil, 59%: gas, 58%: electric, 47%, other, 69%)
- Owner occupiers (owner occ. 67%: NIHE, 28%: private rented, 31%: housing association, 49%)
- Higher income consumers (=<£20K, 34%: £20K-£40K, 67%: >£40K, 63%)
- Consumers living in households not in receipt of Universal Credit (64% vs. 35%)

More likely to 'know a lot' or 'know a little' about: **oil to gas central heating conversion**

- Men (79% vs. 50%)
- Consumers aged 35-59 (16-34, 57%: 35-59, 72%: 60+, 58%)
- Consumers in higher social bands (ABC1, 74%: C2DE, 56%)
- Consumers with a higher level of educational attainment (low, 50%: medium, 62%: high, 74%)
- Consumers in areas other than the West (North, 65%: South, 66%: East, 66%: West, 52%)
- Consumers using non-electric heating sources (oil, 66%: gas, 69%: electric, 44%, other, 55%)

- Owner occupiers (owner occ. 73%: NIHE, 52%: private rented, 31%: housing association, 50%)
- Higher income consumers (=<£20K, 43%: £20K-£40K, 70%: >£40K, 78%)
- Consumers living in households not in receipt of Universal Credit (71% vs. 40%)

More likely to 'know a lot' or 'know a little' about: **high energy efficiency oil boilers (where gas isn't available)**

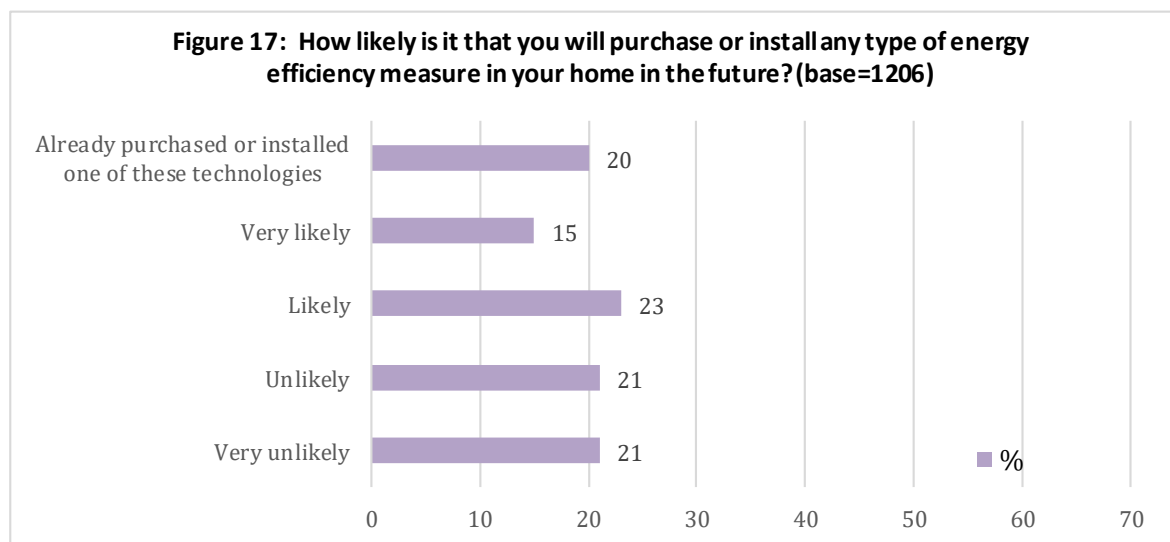
- Men (74% vs. 41%)
- Consumers aged 35-59 (16-34, 48%: 35-59, 65%: 60+, 51%)
- Consumers in higher social bands (ABC1, 68%: C2DE, 46%)
- Consumers with a higher level of educational attainment (low, 40%: medium, 52%: high, 70%)
- Those living in rural areas (63% vs. 53%)
- Consumers living in areas where natural gas is unavailable (63% vs. 53%)
- Consumers using non-electric heating sources (oil, 60%: gas, 55%: electric, 41%, other, 57%)
- Owner occupiers (owner occ. 67%: NIHE, 38%: private rented, 24%: housing association, 42%)
- Higher income consumers (=<£20K, 35%: £20K-£40K, 67%: >£40K, 77%)
- Consumers living in households not in receipt of Universal Credit (64% vs. 31%)

4.2 Likelihood of Purchasing or Installing Energy Efficiency Measures

Having been presented with a list of examples of energy efficiency measures, consumers were asked how likely is it that they will purchase or install any type of energy efficiency measure in your home in the future.

Figure 17 shows that 20% of consumers said they had already purchased or installed an energy efficiency measure in their home, with 38% saying they would be likely to purchase or install one ('very likely', 15%; 'likely', 23%).

Approximately four out of ten consumers (42%) said they would be unlikely ('unlikely', 21%; 'very unlikely', 21%) to install or purchase an energy efficiency measure.



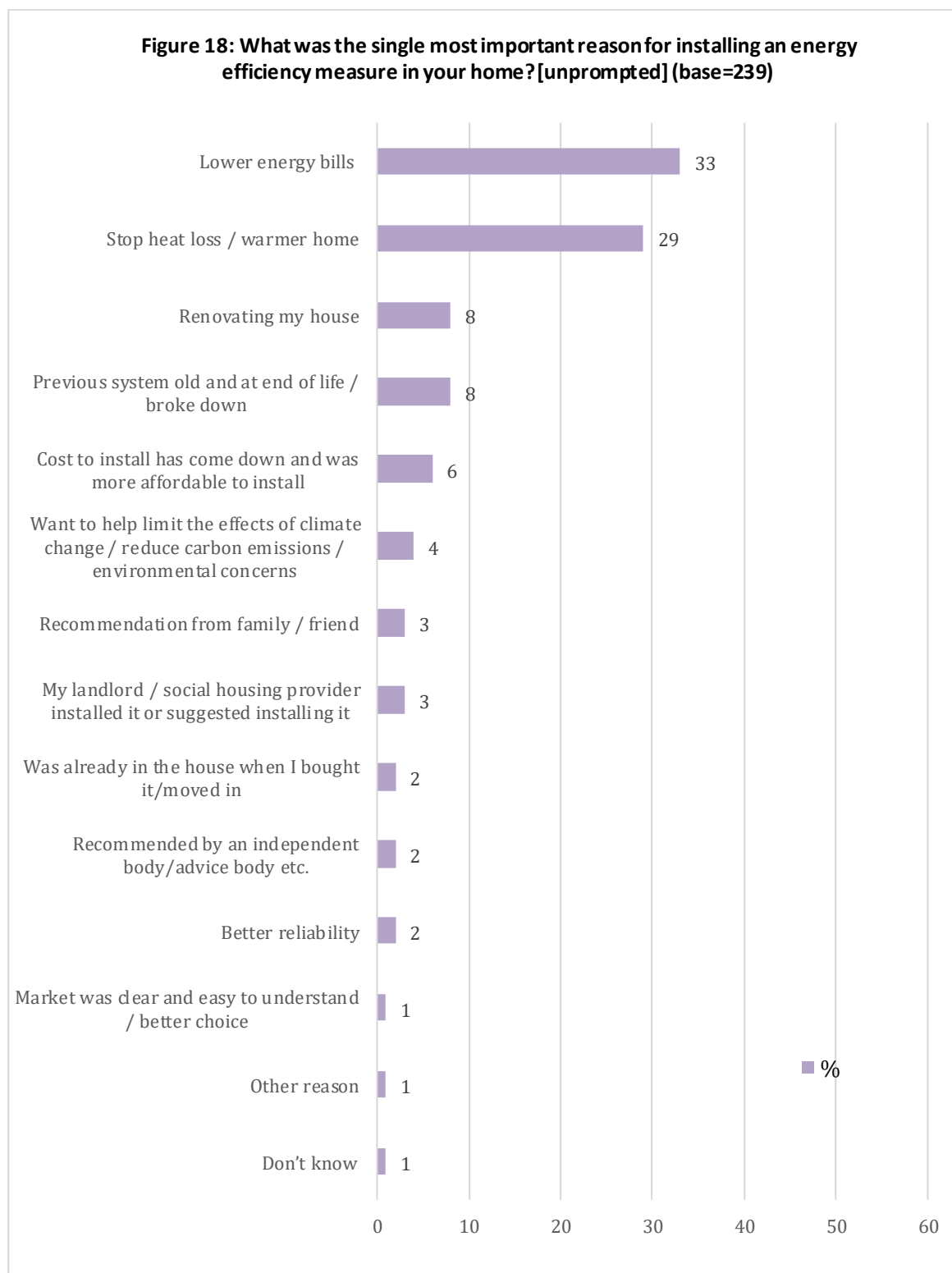
Differences between Consumer Groups (statistically significant)

- Men (25% vs. 15%) were more likely to say they have purchased or installed an energy efficiency measure, with men also proportionately more likely to say they would purchase or install one in the future (41% vs. 36%). A greater proportion of women said they would be unlikely to purchase or install an energy efficiency measure in the future (49% vs. 33%)
- Consumers aged 35-59 (16-34, 15%; 35-59, 24%; 60+, 19%) were more likely to say they have purchased or installed an energy efficiency measure, with this group also more likely to say they will do so in the future (16-34, 41%; 35-59, 43%; 60+, 27%). A majority of older consumers said they would be unlikely to purchase or install an energy efficiency measure in the future (16-34, 44%; 35-59, 33%; 60+, 54%)
- ABC1 consumers (25% vs. 15%) were more likely to say they have purchased or installed an energy efficiency measure, with ABC1 consumers also proportionately more likely to say they would do so in the future (52% vs. 27%). A majority of C2DE consumers said they would be unlikely to purchase or install an energy efficiency measure in the future (58% vs. 23%)

- Consumers with a higher level of educational attainment (low, 17%: medium, 16%: high, 25%) were more likely to say they have purchased or installed an energy efficiency measure, with this group also more likely to say they will do so in the future (low, 16%: medium, 39%: high, 52%). A majority of those with a lower level of educational attainment said they would be unlikely to purchase or install an energy efficiency measure (low, 67%: medium, 45%: high, 23%)
- Consumers living in rural areas (24% vs. 18%) were more likely to say will purchase or install an energy efficiency measure in the future, whereas more consumers living in urban areas said they would be unlikely to do so (45% vs. 36%)
- A greater proportion of consumers living in areas where natural gas is currently unavailable said they had purchased or installed an energy efficiency measure (23% vs. 18%), with those living in areas where natural gas is available more likely to say they will not purchase or install an energy efficiency measure in the future (44% vs. 37%)
- Owner occupiers were more likely to say they have purchased or installed an energy efficiency measure (owner occ. 27%: NIHE, 7%: private rented, 9%: housing association, 5%), with a greater number of those in private rented accommodation saying they would be unlikely to purchase or install an energy efficiency measure in the future (owner occ. 27%: NIHE, 59%: private rented, 82%: housing association, 70%)
- Consumers on higher incomes were more likely to say they have purchased or installed an energy efficiency measure (= \pounds 20K, 9%: \pounds 20K- \pounds 40K, 25%: $>\pounds$ 40K, 38%), with a majority of those on low incomes saying they would be unlikely to purchase or install an energy efficiency measure in the future (= \pounds 20K, 71%: \pounds 20K- \pounds 40K, 31%: $>\pounds$ 40K, 16%)
- Those living in households in receipt of Universal Credit were less likely to say they have purchased or installed an energy efficiency measure (9% vs. 23%), with a majority of this group unlikely to purchase or install an energy efficiency measure in the future (69% vs. 35%)
- Those concerned about climate change were significantly more likely to say they have our will be likely to install or purchase an energy efficiency measure (72% vs. 28%), with the majority of those not concerned about climate change unlikely to do so in the future (67% vs. 33%)
- Compared with other consumers, those who believe it is important to personally take action to limit climate change were significantly more likely to say they have our will be likely to install or purchase energy efficiency measures in their homes (69% vs. 37%)

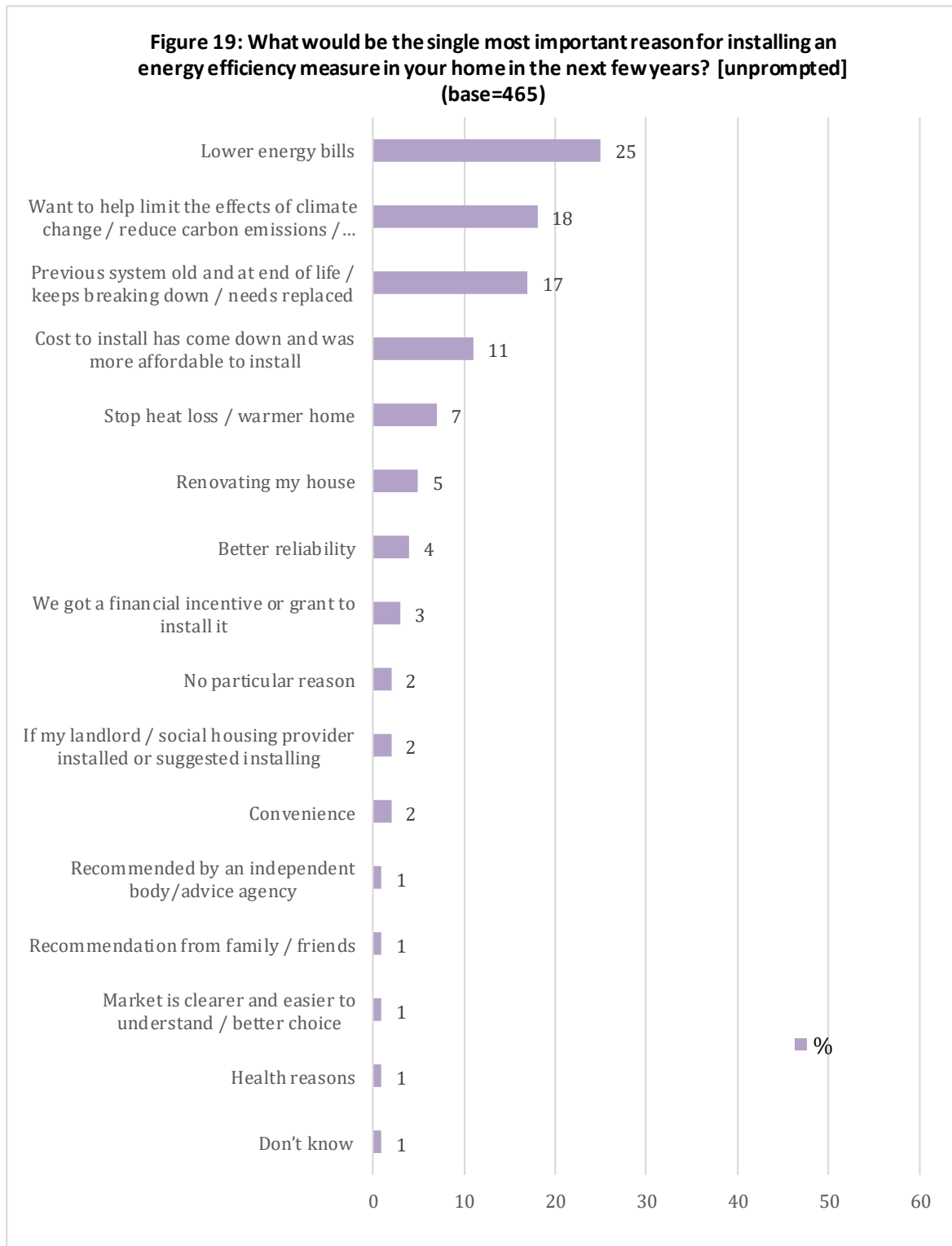
4.3 Reasons Already Installed Energy Efficiency Measures (Unprompted)

Among consumers (n=239) who have already purchased or installed an energy efficiency measure in their home, the main reason for doing so was lower energy bills (33%), with 29% saying they did so to stop heat loss / warmer home. Four percent (4%) of consumers had installed or purchased an energy efficiency measure to limit the effects of climate change.



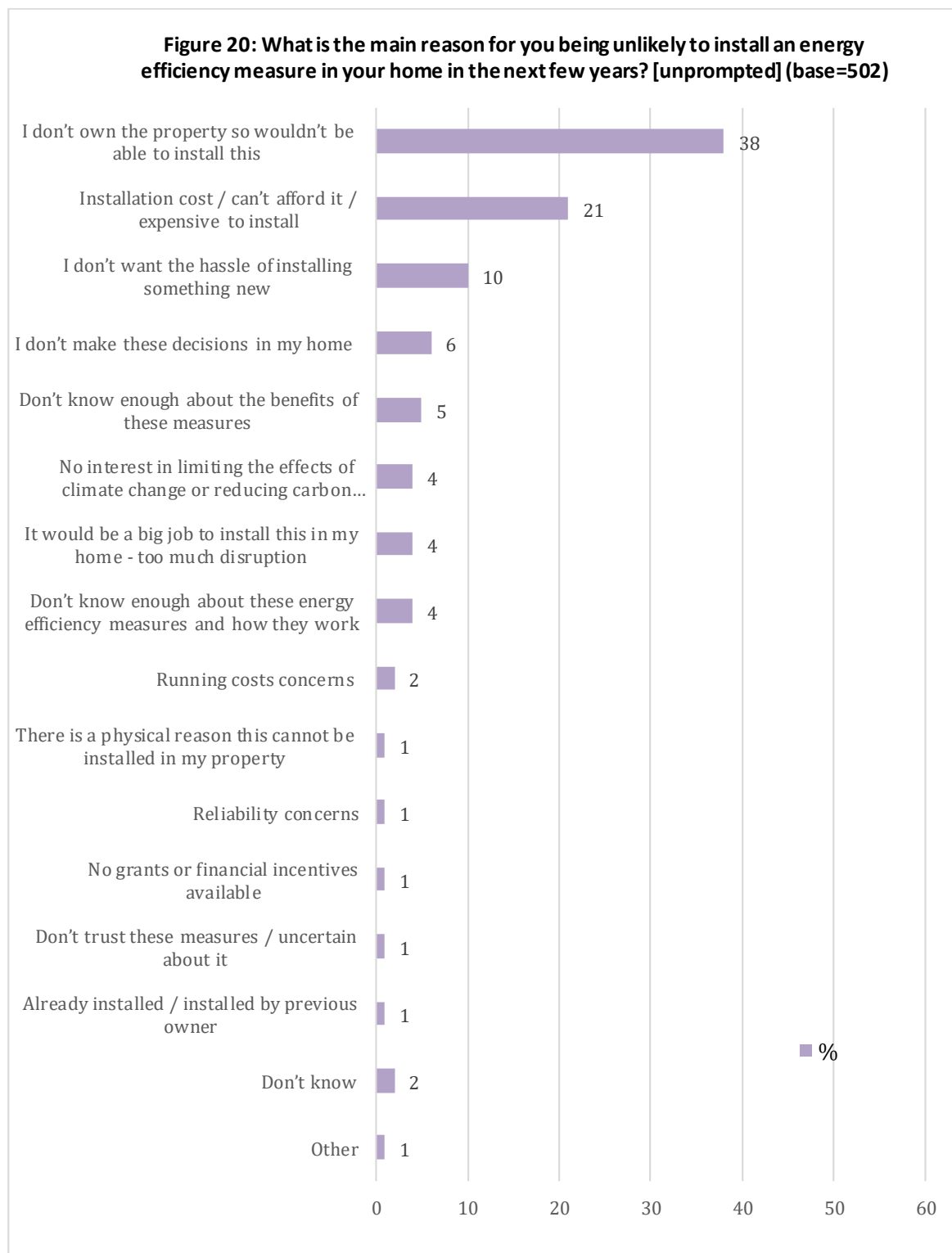
4.4 Reasons Likely to Install / Purchase Energy Efficiency Measures (Unprompted)

Among consumers (n=465) who said they would be likely to purchase or install an energy efficiency measure in their home in the future, the single most important reason for doing so was to lower energy bills (25%), with 18% wanting to limit the effects of climate change. Seventeen percent (17%) said they would do so if their current system was old, at end of life, or breaks down, with 11% motivated by lower installation costs / affordability.



4.5 Reasons Unlikely to Install / Purchase Energy Efficiency Measures (Unprompted)

Among consumers (n=502) who said they would be unlikely to purchase or install an energy efficiency measure in their home in the future, the single most important reason for not doing so was not owning the property they live in (38%), with installation costs / affordability cited by 21% and not wanting the hassle cited by 10%.

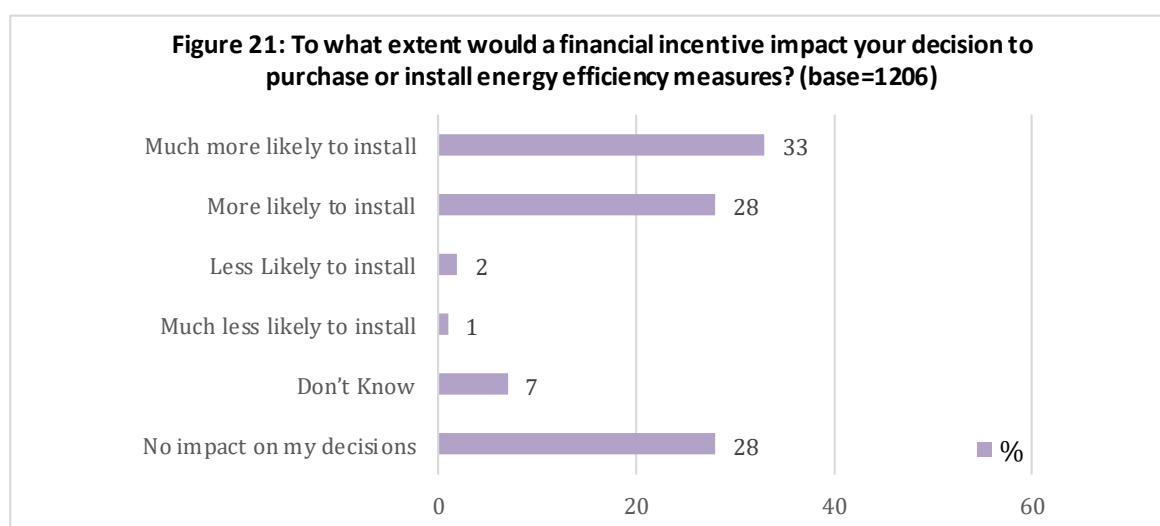


4.6 Financial incentive: Purchasing/Installing Energy Efficiency Measures

Consumers were asked to what extent a financial incentive would impact on their decision to purchase or install an energy efficiency measure in their home.

Figure 21 shows that approximately six out of ten (61%) consumers said that a financial incentive would make them more likely to install an energy efficiency measure ('much more likely', 33%; 'more likely', 28%).

Just 3% said a financial incentive would make them less likely to install an energy efficiency measure ('less likely', 2%; 'much less likely', 1%), with 7% answering, 'don't know'. More than a quarter (28%) said that a financial incentive would not impact on their decision.



Differences between Consumer Groups (statistically significant)

Those **more likely to say a financial incentive would encourage them** to purchase or install an energy efficiency measure included: *(note that those who answered 'don't know' have been excluded from this sub analysis):*

- Men (73% vs. 59%)
- Consumers aged 35-59 (16-34, 58%; 35-59, 76%; 60+, 56%)
- Consumers in higher social bands (ABC1, 83%; C2DE, 51%)
- Consumers with a higher level of educational attainment (low, 42%; medium, 64%; high, 81%)
- Those living in rural areas (72% vs. 63%)
- Those living in areas where natural gas is unavailable (72% vs. 63%)
- Those with gas as main energy source for heating (oil, 66%; gas, 71%; electric, 54%, other, 59%)
- Consumers on higher incomes (≤£20K, 38%; £20K-£40K, 80%; >£40K, 88%)
- Consumers not in receipt of Universal Credit (74% vs. 32%)
- Those concerned about climate change (79% vs. 43%)
- Those who find it easy to understand the language around climate change (75% vs. 49%)

- Those who think it is important for them personally to take action to limit climate change (76% vs. 45%)

Consumers who were proportionately more likely to say a financial incentive **would have no impact on their decision to purchase or install** energy efficiency measures were more likely to included:

- Women (37% vs. 23%)
- Older consumers aged 35-59 (16-34, 38%; 35-59, 20%; 60+, 40%)
- Consumers in lower social bands (ABC1, 15%; C2DE, 45%)
- Consumers with a lower level of educational attainment (low, 55%; medium, 32%; high, 15%)
- Those living in urban areas (33% vs. 26%)
- Those living in areas where natural gas is available (32% vs. 27%)
- Those with electricity as main energy source for heating (oil, 31%; gas, 24%; electric, 44%, other, 39%)
- Consumers on lower incomes (= \leq £20K, 61%; £20K-£40K, 19%; $>$ £40K, 12%)
- Consumers living in households in receipt of Universal Credit (61% vs. 24%)
- Those unconcerned about climate change (51% vs. 19%)
- Those who find it difficult to understand the language around climate change (41% vs. 23%)
- Those who think it is not important for them personally to take action to limit climate change (47% vs. 22%)

4.7 Conclusions and Recommendations: Energy Efficiency Measures

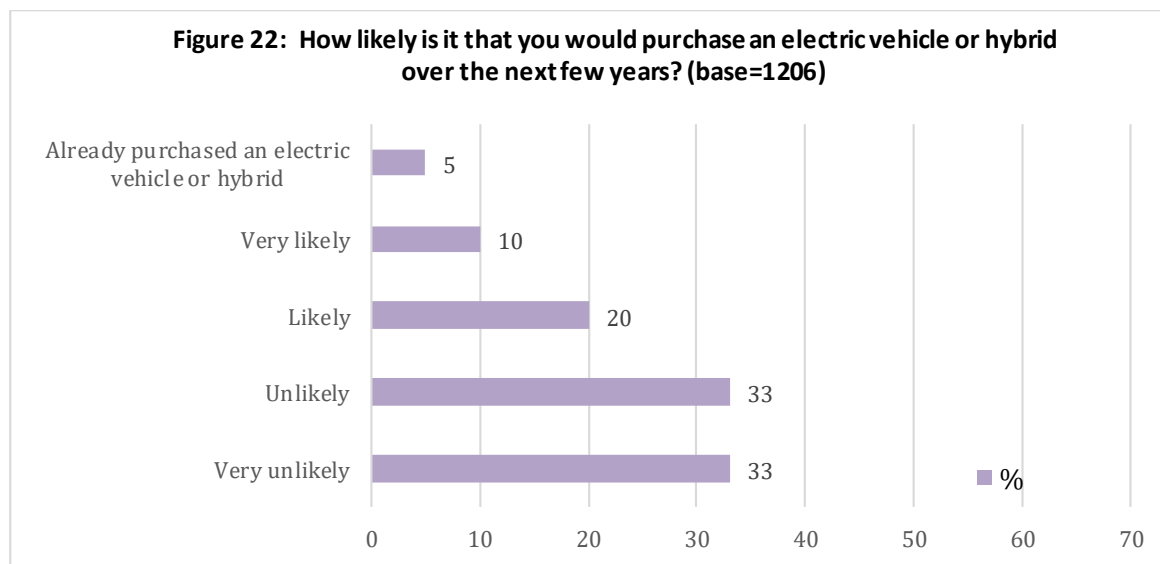
- Compared with low carbon technology, consumers report higher levels of knowledge for different energy efficiency measures, albeit that knowledge levels are again closely associated with factors such as consumer age, educational attainment level and social band etc., with older consumers and those with lower levels of educational attainment, those on lower incomes etc. recording significantly lower levels of knowledge.
- Take up of energy efficiency measures was found to be limited among consumers, with little difference in the proportions of those who say they are likely or unlikely to purchase and install these measures.
- Among those who have installed energy efficiency measures in their home, the most common motivators were lower energy bills and stopping heat loss within the home. Those who expressed an interest in installing energy efficiency measures were again most likely to be motivated by lower energy bills, but wanting to limit climate change was ranked second in importance. Among those unlikely to install these measures, consumers not owning their home was the most common inhibitor, followed by affordability and not wanting the hassle.
- As with low carbon technology, a financial incentive appealed to more than half of consumers who said it would make them more likely to install an energy efficiency measure, but again the survey identified a significant number of consumers who said that a financial incentive would have no impact of on their decision, with this specific group more likely to come from lower income households, live in urban areas, have lower levels of educational attainment, and live in households in receipt of Universal Credit. Again the policy strategy to encourage positive behaviours in this space will require interventions targeted at these groups. Reflecting on these points, consideration should be given to undertaking more detailed research to explore the value of financial incentives as well as the reasons why they have limited appeal to a significant number of consumers.

5. Electric Vehicles or Hybrids

5.1 Likelihood of Purchasing an Electric Vehicle or Hybrid

Just 5% of consumers said they had already purchased an electric vehicle or hybrid, with 30% saying they would be likely to purchase one in the next few years ('very likely', 10%: 'likely', 20%).

Two out of three (66%) consumers said they would be unlikely to purchase an electric vehicle or hybrid in the next few years ('unlikely', 33%: 'very unlikely', 33%).



Differences between Consumer Groups (statistically significant)

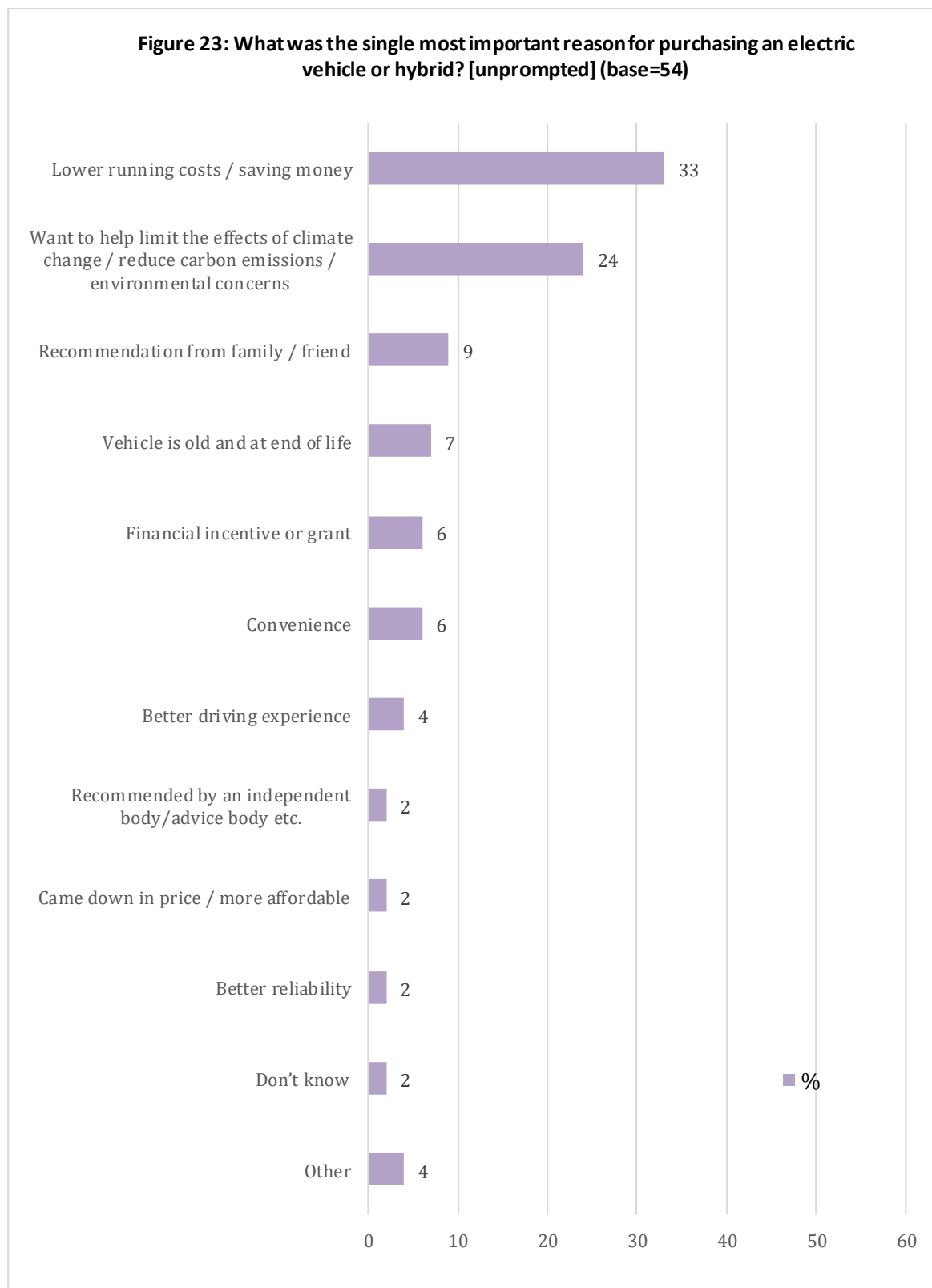
- Men (36% vs. 24%) were more likely to say they will purchase an electric vehicle or hybrid in the next few years, whereas a greater number of women said they will be unlikely to do so (73% vs. 57%)
- More consumers aged under 60 (16-34, 33%: 35-59, 34%: 60+, 19%) said they would be likely to purchase an electric vehicle or hybrid, with proportionately more older consumers unlikely to do so (16-34, 64%: 35-59, 60%: 60+, 78%)
- ABC1 consumers (7% vs. 2%) were more likely to say they have purchased an electric vehicle or hybrid, with ABC1 consumers also proportionately more likely to say they would purchase an electric vehicle or hybrid (44% vs. 17%). A majority of C2DE consumers said they would be unlikely purchase an electric or hybrid vehicle in the future (81% vs. 48%)
- Consumers with a higher level of educational attainment (low, 2%: medium, 2%: high, 9%) were more likely to report having already purchased and electric vehicle or hybrid, with this group also more likely to say they will purchase an electric vehicle or hybrid in the next few years (low, 10%: medium, 24%: high, 48%). A greater number of consumers with relatively lower levels of educational attainment said they would be unlikely to purchase

an electric vehicle or hybrid in the next few years (low, 88%: medium, 75%: high, 43%)

- Consumers living in rural areas (36% vs. 27%) were more likely to say they will purchase an electric vehicle or hybrid in the next few years, with urban dwellers more likely to say they will not (69% vs. 60%)
- Owner occupiers were more likely to say they have purchased an electric vehicle or hybrid in the next few years (owner occ. 6%: NIHE, 2%: private rented, 0%: housing association, 2%), with a greater number of owner occupiers saying they are likely to do so in the next few years (owner occ. 37%: NIHE, 15%: private rented, 9%: housing association, 20%). In contrast, groups other than owner occupiers, were more likely to say they will not be purchasing an electric vehicle in the next few years (owner occ. 57%: NIHE, 84%: private rented, 91%: housing association, 78%)
- Consumers on higher incomes were more likely to say they have purchased an electric vehicle or hybrid (\leq £20K, 0%: £20K-£40K, 6%: $>$ £40K, 19%), with a majority of those on relatively lower incomes saying they would be unlikely to purchase an electric vehicle or hybrid in the next few years (\leq £20K, 88%: £20K-£40K, 58%: $>$ £40K, 35%)
- None of the consumers living in households in receipt of Universal Credit said they had purchased an electric vehicle or hybrid (compared with 6% of other households). A majority of those living in households in receipt of Universal Credit said they are unlikely to purchase an electric vehicle or hybrid in the next few years (86% vs. 61%)
- Those concerned about climate change were significantly more likely to say they have already or will in the future purchase an electric vehicle or hybrid (45% vs. 14%), with a greater number of those unconcerned about climate change unlikely to do so in the future (86% vs. 55%)
- Those who believe it is important to personally take action to limit climate change were significantly more likely to say they have or will be likely to purchase an electric vehicle or hybrid in the future (43%). This compared with 15% of consumers who believe it is not important to personally take action to reduce climate change

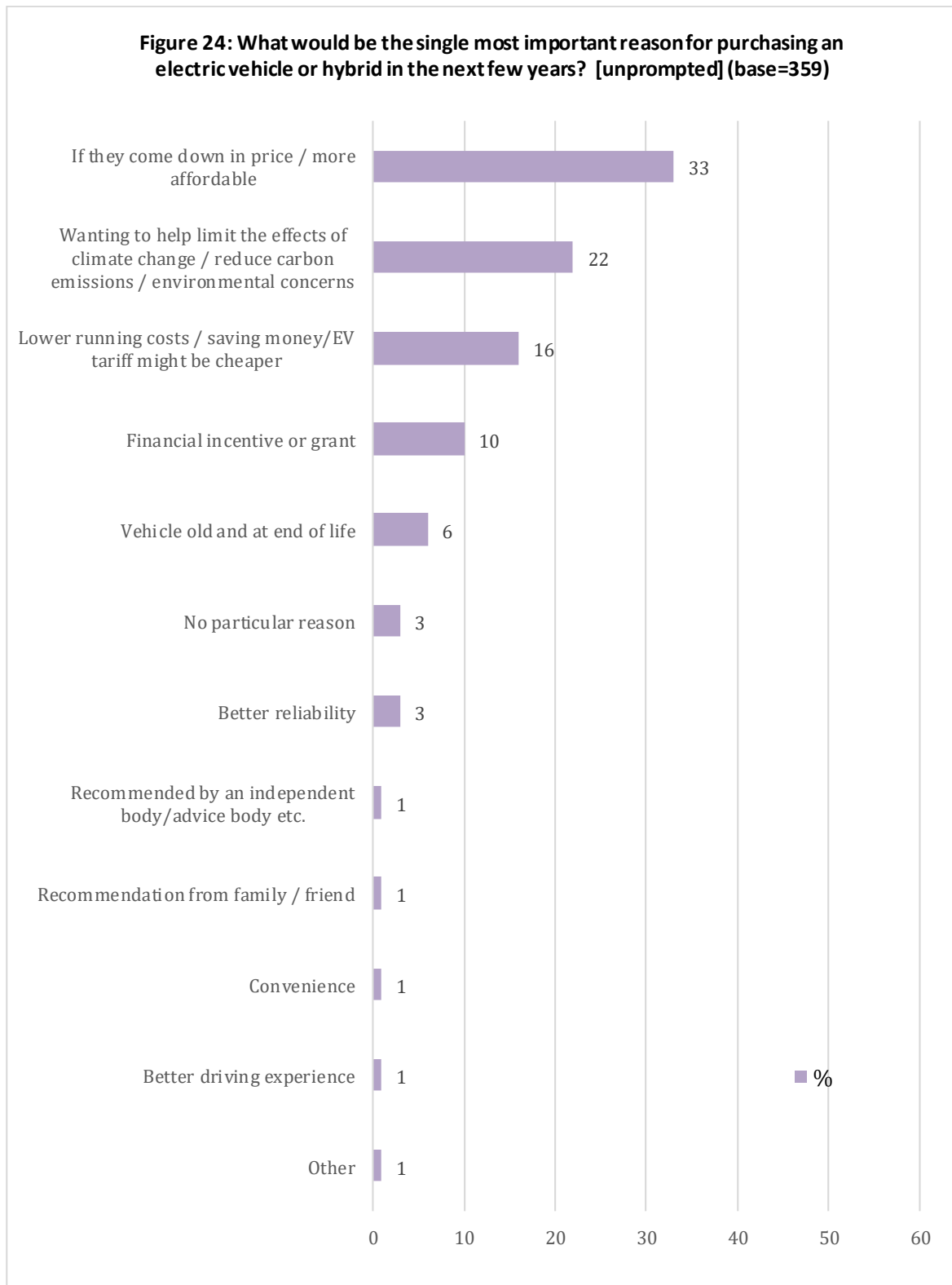
5.2 Reasons Already Purchased an Electric Vehicle or Hybrid (Unprompted)

The most common reasons why consumers (n=54) had already purchased an electric vehicle or hybrid included: lower running costs / saving money (33%); doing so to limit the effects of climate change (24%); and, purchasing on the basis of a recommendation from family / friends (9%).



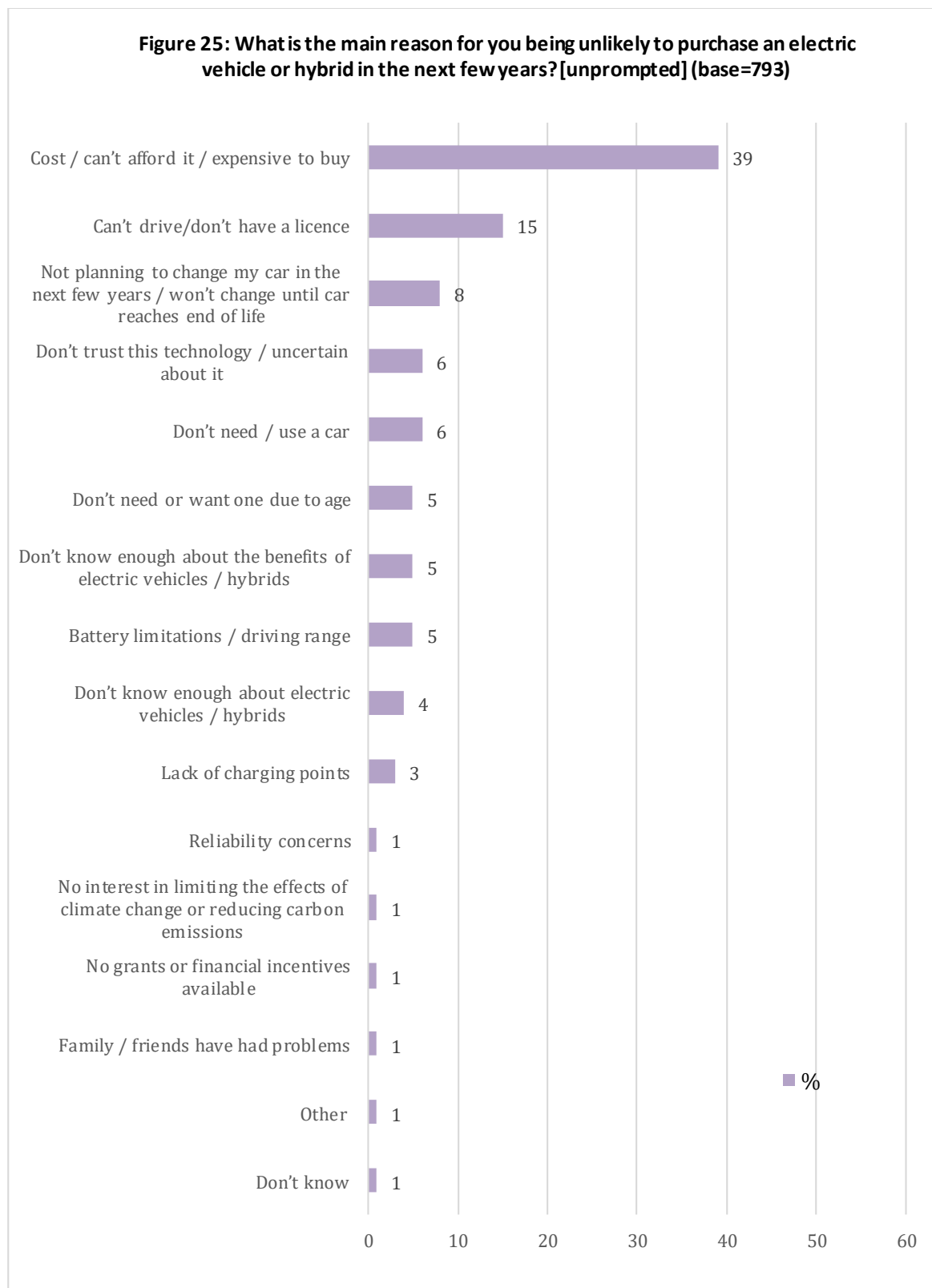
5.3 Reasons Likely to Purchase an Electric Vehicle or Hybrid (Unprompted)

The most common reasons why consumers (n=359) said they would be likely to purchase an electric vehicle or hybrid in the next few years included: affordability (33%); wanting to limit the effects of climate change (22%); and, the attraction of lower running costs / saving money / expectation that EV tariffs may be cheaper (16%).



5.4 Reasons Unlikely to Purchase an Electric Vehicle or Hybrid (Unprompted)

The most common reasons why consumers (n=793) would be unlikely to purchase an electric vehicle or hybrid in the next few years included: cost / affordability (39%); not being able to drive / no licence (15%); and, not having any plans to change their car in the next few years (8%).

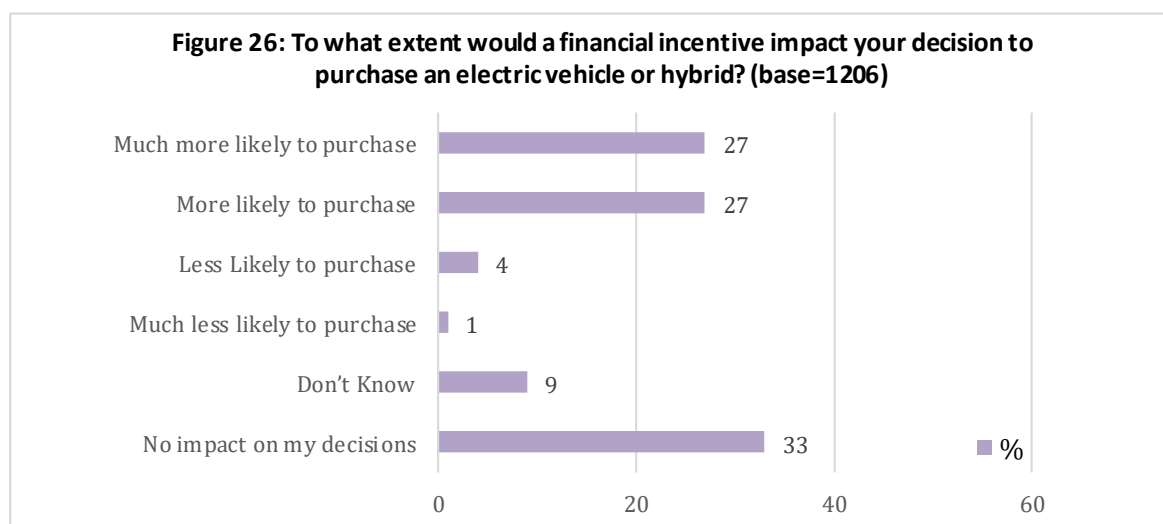


5.5 Financial incentive: Purchasing an Electric Vehicle or Hybrid

Consumers were asked to what extent a financial incentive would impact on their decision to purchase an electric vehicle or hybrid.

Figure 26 shows that just over half (54%) of consumers said that a financial incentive would make them more likely to purchase an electric vehicle or hybrid ('much more likely', 27%; 'more likely', 27%).

Just 5% said a financial incentive would make them less likely to purchase an electric vehicle or hybrid ('less likely', 4%; 'much less likely', 1%), with 9% answering, 'don't know'. One third of consumers (33%) said that a financial incentive would not impact on their decision to purchase an electric vehicle or hybrid.



Differences between Consumer Groups (statistically significant)

Consumers more likely to say a financial incentive will make them **more likely** to purchase an electric vehicle or hybrid included: *(note that those who answered 'don't know' have been excluded from this sub analysis):*

- Men (66% vs. 53%)
- Consumers aged 35-59 (16-34, 61%; 35-59, 69%; 60+, 40%)
- Consumers in higher social bands (ABC1, 77%; C2DE, 44%)
- Consumers with a higher level of educational attainment (low, 36%; medium, 56%; high, 76%)
- Those living in rural areas (65% vs. 56%)
- Consumers on higher incomes (= <£20K, 36%; £20K-£40K, 77%; >£40K, 86%)
- Consumers not in receipt of Universal Credit (65% vs. 35%)
- Those concerned about climate change (73% vs. 35%)
- Those who find it easy to understand the language around climate change (70% vs. 39%)
- Those who think it is important for them personally to take action to limit climate change (71% vs. 34%)

Consumers who said a financial incentive will have **no impact on their decision** to purchase an electric vehicle or hybrid included: *(note that those who answered 'don't know' have been excluded from this sub analysis):*

- Women (42% vs. 29%)
- Older consumers (16-34, 35%: 35-59, 27%: 60+, 54%)
- Consumers in lower social bands (ABC1, 50%: C2DE, 19%)
- Consumers with a low level of educational attainment (low, 60%: medium, 53%: high, 20%)
- Those living in urban areas (38% vs. 32%)
- Consumers on lower incomes (\leq £20K, 61%: £20K-£40K, 22%: >£40K, 14%)
- Consumers in receipt of Universal Credit (56% vs. 31%)
- Those unconcerned about climate change (58% vs. 23%)
- Those who find it difficult to understand the language around climate change (51% vs. 26%)
- Those who think it is not important for them personally to take action to limit climate change (58% vs. 25%)

5.6 Conclusions and Recommendations: Electric Vehicles and Hybrids

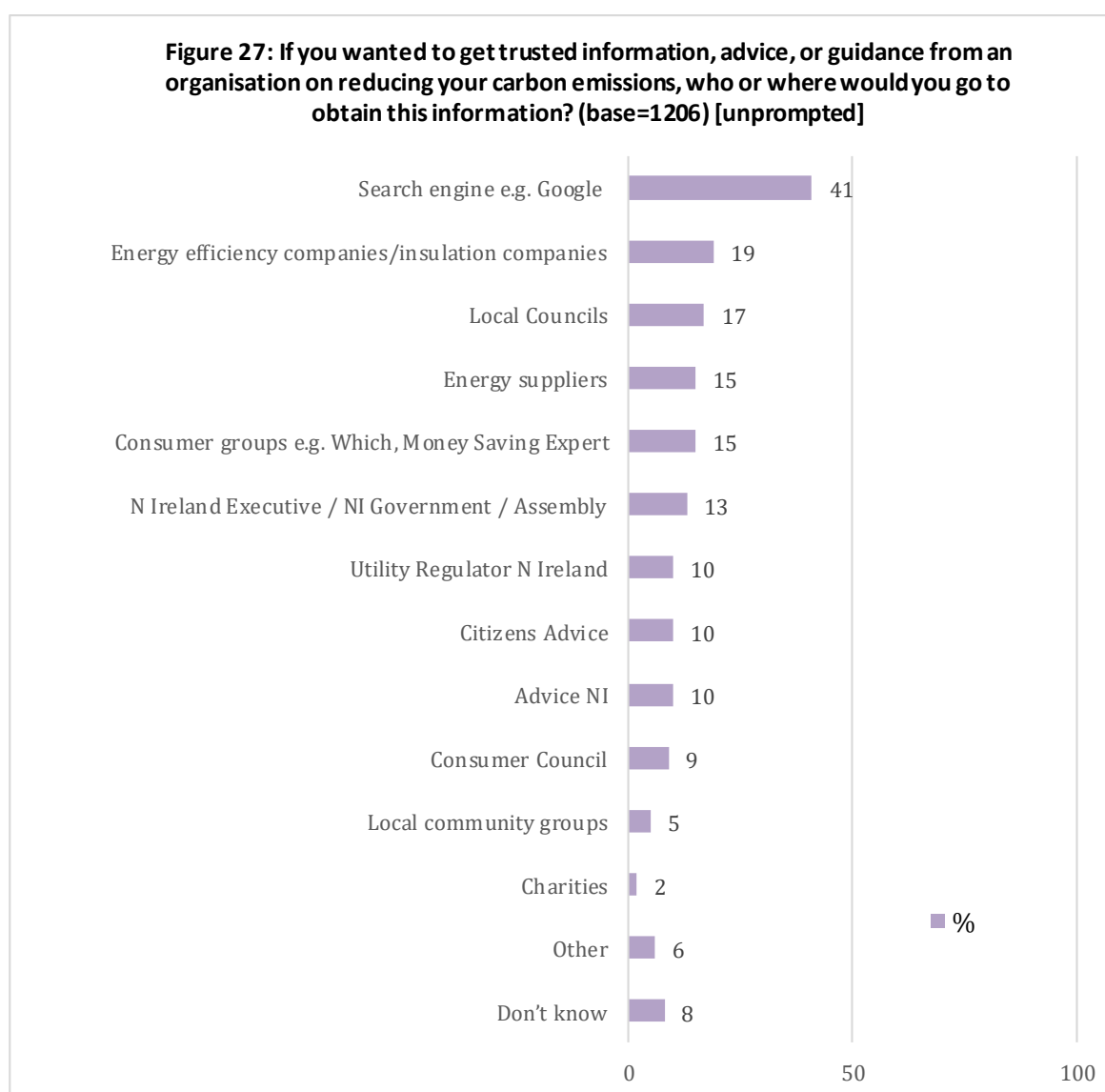
- Just 5% of consumers had purchased an electric vehicle or hybrid, with only a minority of consumers expressing an interest in doing so. As with both low carbon technology and energy efficiency measures, interest in electric vehicles or hybrids is greater among particular customer groups including those in higher social bands, those with higher levels of educational attainment, and among higher income consumers. The survey provides direction on profiling those groups less interested in electric vehicles and hybrids (which are similar in profile to those groups who are less interested in LCTs and energy efficiency measures) and allows particular interventions (e.g. policy, public information campaigns etc.) to be more targeted to improve knowledge and drive positive behaviour change.
- Lower running costs and limiting climate change are the most common factors that have motivated consumers to purchase an electric vehicle or hybrid, with greater affordability and price the factors most likely to motivate a purchase in the future. Among those unlikely to purchase an electric vehicle or hybrid the most common inhibitors are cost, not being able to drive, and not needing to change vehicle.
- In terms of a financial incentive, the pattern of response among consumers was consistent with low carbon technology and energy efficiency measures, with a slight majority saying they would be motivated to purchase if a financial incentive were available. A significant minority said that a financial incentive would not impact on their decision to purchase.
- Sentiment towards electric vehicles and hybrids is significantly associated with consumer awareness, knowledge and behaviour, with those more positively engaged with the issue of climate change more likely to express an interest in making a purchase. Again this underscores a need for an effective consumer awareness campaign to help shift consumer knowledge levels, with the expectation that this will positively influence spending behaviour.
- Given these findings on electric vehicles and hybrids, consideration should be given to policy development around linking financial incentives to key trigger points such as when consumers are changing or upgrading their vehicles.

6. Consumer Protection and Trust

Improving consumer awareness and understanding of climate change, and how consumers can contribute to reducing carbon emissions will be critical to Northern Ireland meeting its net zero target. Given this, a number of questions were included in the survey to better understand where consumers would go to obtain trusted information on climate change, as well as their level of support for the setting up of a single advice body to ensure that consumers are supported to make positive behaviour changes to reduce carbon emissions.

6.1 Obtaining Trusted Information on Reducing Carbon Emissions (Unprompted)

Internet search engines (41%), energy efficiency companies / insulation companies (19%), local councils (17%) and energy suppliers (15%), were the most common sources of advice or guidance if consumers wanted to obtain trusted information on reducing their carbon emissions. Six percent offered other responses⁹.



⁹ Included: family (n=21); friends (n=10); don't know (n=54); neighbours (n=2); word of mouth (n=2); landlord (n=1); no interest in finding out (n=1); not aware of any (n=1); other people (n=1); TV (n=4) customers (n=1).

Differences between Consumer Groups (statistically significant)

More likely to cite Internet **Search Engines**

- Consumers aged under 60 (16-34, 50%: 35-59, 48%: 60+, 18%)
- Consumers in higher social bands (ABC1, 48%: C2DE, 35%)
- Consumers with a higher level of educational attainment (low, 27%: medium, 44%: high, 46%)

More likely to cite **Energy Efficiency /Insulation Companies**

- Men (23% vs. 16%)
- Consumers aged 35-59 (16-34, 16%: 35-59, 23%: 60+, 16%)
- Consumers in higher social bands (ABC1, 25%: C2DE, 14%)
- Consumers with a higher level of educational attainment (low, 11%: medium, 17%: high, 25%)

More likely to cite **Local Councils**

- Consumers aged 60+ (16-34, 16%: 35-59, 14%: 60+, 23%)

More likely to cite **Energy Suppliers**

- Consumers in higher social bands (ABC1, 18%: C2DE, 12%)
- Consumers with a higher level of educational attainment (low, 8%: medium, 16%: high, 18%)

More likely to cite **Consumer Groups (e.g. Which, Money Saving Expert etc.)**

- Consumers aged 35-59 (16-34, 14%: 35-59, 18%: 60+, 11%)
- Consumers in higher social bands (ABC1, 19%: C2DE, 12%)

More likely to cite the **Northern Ireland Executive / Assembly**

- Men (16% vs. 11%)
- Consumers with a higher level of educational attainment (low, 8%: medium, 13%: high, 17%)
- Those living in rural areas (17% vs. 12%)

More likely to cite **The Utility Regulator**

- Men (12% vs. 8%)
- Consumers in higher social bands (ABC1, 14%: C2DE, 7%)
- Consumers with a higher level of educational attainment (low, 8%: medium, 8%: high, 13%)
- Those living in rural areas (13% vs. 9%)

More likely to cite **Citizens Advice**

- Those living in urban areas (12% vs. 8%)

More likely to cite **Advice NI**

- Men (13% vs. 8%)
- Consumers in higher social bands (ABC1, 14%: C2DE, 7%)
- Consumers with a higher level of educational attainment (low, 3%: medium, 9%: high, 15%)

More likely to cite **The Consumer Council**

- Consumers in higher social bands (ABC1, 11%: C2DE, 8%)
- Consumers with a higher level of educational attainment (low, 3%: medium, 9%: high, 13%)

More likely to cite **Local Community Groups**

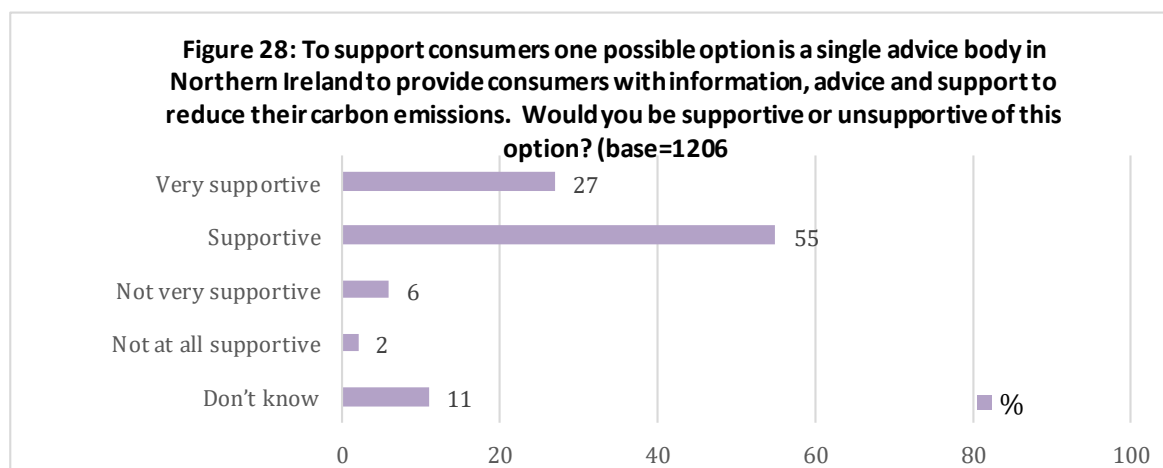
- Consumers aged 60+ (16-34, 4%: 35-59, 2%: 60+, 8%)

More likely to cite **Charities**

- Respondents with an intermediate level of educational attainment (low, 1%: medium, 4%: high, 1%)

6.2 Support for a Single Advice Body to Support Consumers

Approximately eight out of ten (82%) consumers said they are supportive of a single advice body in Northern Ireland to provide consumers with information, advice, and support to reduce their carbon emissions ('very supportive', 27%: 'supportive', 55%), with 8% unsupportive ('not very supportive', 6%: 'not at all supportive', 2%). Eleven percent answered, 'don't know'.



Differences between Consumer Groups (statistically significant)

More likely to be supportive of a single advice body:

- Consumers aged under 60 (16-34, 83%: 35-59, 88%: 60+, 71%)
- Consumers in higher social bands (ABC1, 93%: C2DE, 73%)
- Consumers with a higher level of educational attainment (low, 64%: medium, 84%: high, 92%)
- Non prepayment meter households (86% vs. 73%)

6.3 Conclusions and Recommendations: Consumer Protection and Trust

- Search engines (e.g. Google) were most commonly cited by consumers as the source for obtaining advice or guidance on reducing their carbon emissions. However, the survey findings also underscore the value of other sources to consumers (*local councils, public bodies, advice organisations etc.*). There were also differences in preferred sources between particular consumer groups, with younger consumers proportionately more likely to favour online sources whereas older consumers were more likely to favour community groups. Taking this evidence collectively, it is recommended that both digital and non-digital information platforms be used to communicate messaging aimed at helping and supporting consumers to reduce their carbon emissions.
- The survey provides strong evidence that consumers are highly supportive of a single advice body in Northern Ireland to provide consumers with information, advice, and support to reduce their carbon emissions. The recent Energy Strategy options consultation published by the Department for the Economy has proposed a “one stop shop” approach to energy information, advice and support. It is anticipated that a single advice body of this nature could also make a positive contribution to raising public awareness of the benefits of limiting climate change, as well as promoting consumer behaviours which lead to a reduction in carbon emissions and achieving net zero. The level of detail provided by the survey, in terms of the profiling of particular consumer groups more engaged and less engaged with the issue of climate change, will be helpful for targeting specific groups of consumers in the promotion of behavioural change.

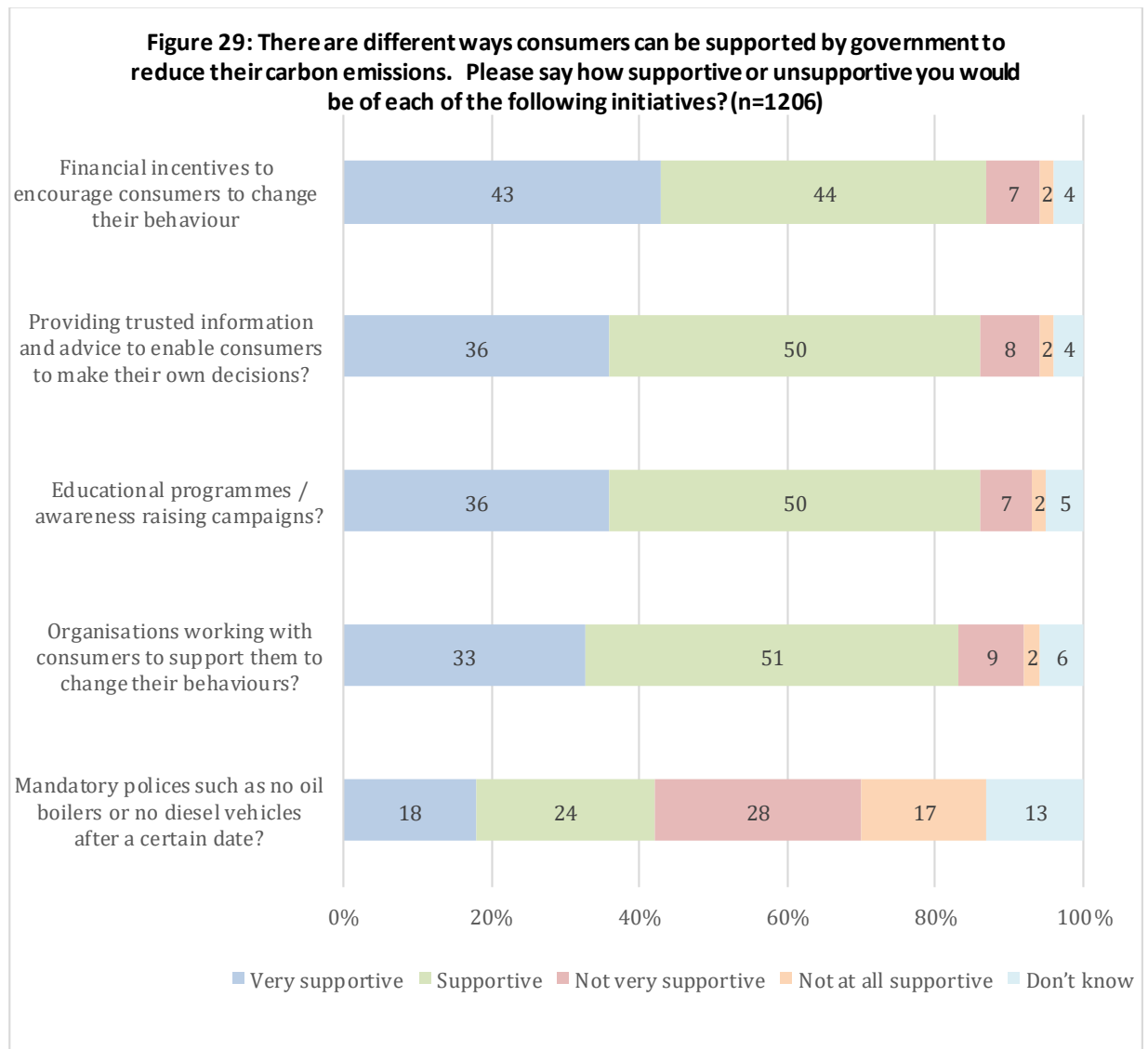
7. Government Initiatives and Consumer Attitudes

7.1 Consumer Support for Government Initiatives

Consumers were asked about their support for possible government initiatives aimed at reducing their carbon emissions.

Figure 29 shows that 87% of consumers are supportive of financial incentives to encourage consumers to change their behaviour ('very supportive', 43%; 'supportive', 44%), with similar levels of support recorded for: providing trusted information and advice to enable consumers to make their own decisions [86%] ('very supportive', 36%; 'supportive', 50%); educational programmes / awareness raising campaigns [86%] ('very supportive', 36%; 'supportive', 50%); and, organisations working with consumers to support them to change their behaviours [84%] ('very supportive', 33%; 'supportive', 51%).

Consumers were less supportive of mandatory policies such as no oil boilers or no diesel vehicles after a certain date [42%] ('very supportive', 18%; 'supportive', 24%).



Differences between Consumer Groups (statistically significant)

More likely to be supportive of **financial incentives to encourage consumers to change their behaviour**

- Consumers aged under 60 (16-34, 87%: 35-59, 91%: 60+, 81%)
- Consumers in higher social bands (ABC1, 93%: C2DE, 83%)
- Consumers with a higher level of educational attainment (low, 83%: medium, 86%: high, 93%)
- Those who believe it is important to personally take action to limit climate change (96% vs. 66%)

More likely to be supportive of **providing trusted information and advice to enable consumers to make their own decisions**

- Consumers aged under 60 (16-34, 88%: 35-59, 91%: 60+, 76%)
- Consumers in higher social bands (ABC1, 94%: C2DE, 79%)
- Consumers with a higher level of educational attainment (low, 73%: medium, 87%: high, 93%)
- Those who believe it is important to personally take action to limit climate change (96% vs. 62%)

More likely to be supportive of **educational programmes / awareness raising campaigns**

- Consumers aged under 60 (16-34, 88%: 35-59, 90%: 60+, 77%)
- Consumers in higher social bands (ABC1, 94%: C2DE, 80%)
- Consumers with a higher level of educational attainment (low, 72%: medium, 88%: high, 93%)
- Those who believe it is important to personally take action to limit climate change (96% vs. 63%)

More likely to be supportive of **organisations working with consumers to support them to change their behaviours**

- Consumers aged under 60 (16-34, 87%: 35-59, 89%: 60+, 72%)
- Consumers in higher social bands (ABC1, 92%: C2DE, 76%)
- Consumers with a higher level of educational attainment (low, 69%: medium, 84%: high, 92%)
- Those who believe it is important to personally take action to limit climate change (95% vs. 57%)

More likely to be supportive of **mandatory policies such as no oil boilers or no diesel vehicles after a certain date**

- Males (45% vs. 39%)
- Consumers aged under 60 (16-34, 44%: 35-59, 43%: 60+, 36%)
- Consumers in higher social bands (ABC1, 53%: C2DE, 32%)
- Consumers with a higher level of educational attainment (low, 25%: medium, 36%: high, 58%)

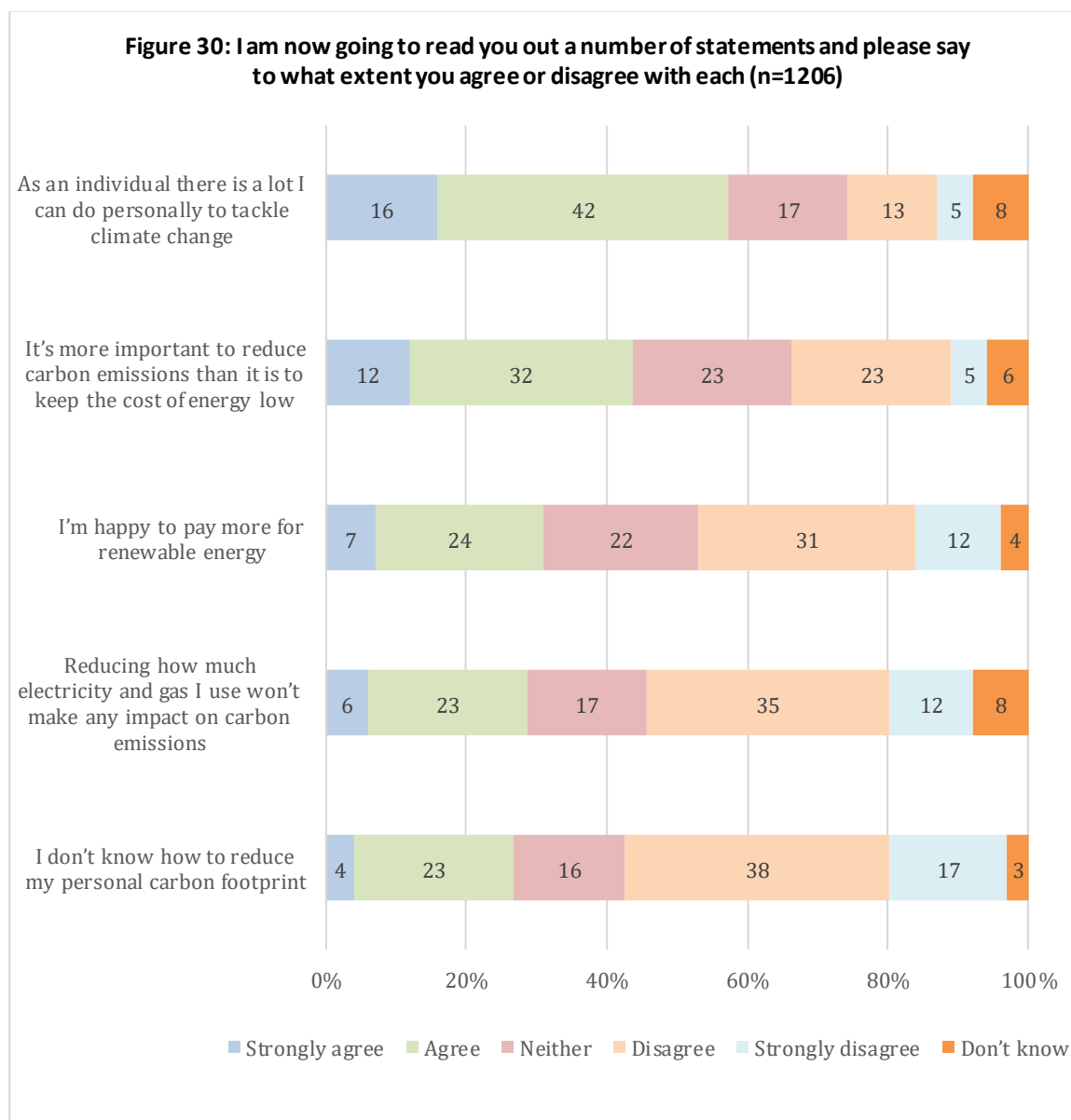
- Those who believe it is important to personally take action to limit climate change (50% vs. 23%)

7.2 Consumer Attitudes to Climate Change Issues

Consumers were asked to what extent they agreed with a number of statements relating to climate change.

Figure 30 shows that the highest level of agreement (58%) was for the statement *'as an individual there is a lot I can do personally to tackle climate change'* ('strongly agree', 16%; 'agree', 42%), with 17% neither agreeing nor disagreeing and 18% disagreeing ('disagree', 13%; 'strongly disagree', 5%). Eight percent were undecided.

In contrast, the lowest level of agreement (27%) was recorded for the statement *'I don't know how to reduce my personal carbon footprint'* ('strongly agree', 4%; 'agree', 23%), with 16% neither agreeing nor disagreeing and 55% disagreeing ('disagree', 38%; 'strongly disagree', 17%). Three percent were undecided.



Differences between Consumer Groups (statistically significant)

More likely to agree with the statement: **'As an individual there is a lot I can do personally to tackle climate change'**

*Those more likely to **agree** with this statement included:* those aged under 60 (16-34, 60%: 35-59, 66%: 60+, 41%), consumers in higher social bands (ABC1, 72%: C2DE, 45%), those with a higher level of educational attainment (low, 37%: medium, 53%: high, 76%), those concerned about climate change (76% vs. 26%), those who find it easy to understand the language around climate change (71% vs. 34%) and those who think it is important for them to personally take action to reduce climate change (74% vs. 18%).

*Those more likely to **disagree** with this statement included:* older consumers (16-34, 18%: 35-59, 14%: 60+, 24%), those in lower social bands (C2DE, 24%: ABC1, 10%), those with a lower level of educational attainment (low, 28%: medium, 20%: high, 9%), those unconcerned about climate change (36% vs. 8%), those who find it difficult to understand the language around climate change (29% vs. 11%) and those who think it is not important for them to personally take action to reduce climate change (44% vs. 7%).

More likely to agree with the statement: **'it's more important to reduce carbon emissions than it is to keep the cost of energy low'**

*Those more likely to **agree** with this statement included:* men (48% vs. 40%) those aged under 60 (16-34, 46%: 35-59, 48%: 60+, 33%), consumers in higher social bands (ABC1, 57%: C2DE, 32%), those with a higher level of educational attainment (low, 23%: medium, 38%: high, 63%), those concerned about climate change (59% vs. 16%), those who find it easy to understand the language around climate change (54% vs. 23%) and those who think it is important for them to personally take action to reduce climate change (56% vs. 13%).

*Those more likely to **disagree** with this statement included:* older consumers (16-34, 25%: 35-59, 25%: 60+, 38%), those in lower social bands (C2DE, 38%: ABC1, 16%), those with a lower level of educational attainment (low, 48%: medium, 29%: high, 15%), those unconcerned about climate change (53% vs. 15%), those who find it difficult to understand the language around climate change (45% vs. 21%) and those who think it is not important for them to personally take action to reduce climate change (57% vs. 17%).

More likely to agree with the statement: **'I'm happy to pay more for renewable energy'**

*Those more likely to **agree** with this statement included:* men (36% vs. 26%), those under 60 (16-34, 30%: 35-59, 37%: 60+, 21%), consumers in higher social bands (ABC1, 44%: C2DE, 20%), those with a higher level of educational attainment (low, 13%: medium, 24%: high, 50%), those concerned about climate change (44% vs. 9%), those who find it easy to understand the language around climate change (40% vs. 15%) and those who think it is important for them to personally take action to reduce climate change (41% vs. 3%).

Those more likely to **disagree** with this statement included: women (47% vs. 39%); older consumers (16-34, 42%: 35-59, 39%: 60+, 54%), those in lower social bands (C2DE, 58%: ABC1, 26%), those with a lower level of educational attainment (low, 67%: medium, 47%: high, 25%), those unconcerned about climate change (71% vs. 29%), those who find it difficult to understand the language around climate change (60% vs. 35%) and those who think it is not important for them to personally take action to reduce climate change (76% vs. 30%).

More likely to agree with the statement: **'Reducing how much electricity and gas I use won't make any impact on carbon emissions'**

Those more likely to **agree** with this statement included: consumers aged 60+ (16-34, 29%: 35-59, 24%: 60+, 35%), those in lower social bands (C2DE, 36%: ABC1, 20%), those with a lower level of educational attainment (low, 41%: medium, 32%: high, 17%), those unconcerned about climate change (42% vs. 21%), those who find it difficult to understand the language around climate change (42% vs. 22%) and those who think it is not important for them to personally take action to reduce climate change (46% vs. 21%).

Those more likely to **disagree** with this statement included: men (50% vs. 44%) those aged under 60 (16-34, 29%: 35-59, 24%: 60+, 35%), consumers in higher social bands (ABC1, 60%: C2DE, 36%), those with a higher level of educational attainment (low, 30%: medium, 40%: high, 66%), those concerned about climate change (61% vs. 23%), those who find it easy to understand the language around climate change (58% vs. 25%) and those who think it is important for them to personally take action to reduce climate change (60% vs. 17%).

More likely to agree with the statement: **'I don't know how to reduce my personal carbon footprint'**

Those more likely to **agree** with this statement included: women (31% vs. 21%), older consumers (16-34, 25%: 35-59, 21%: 60+, 38%), those in lower social bands (C2DE, 35%: ABC1, 17%), those with a lower level of educational attainment (low, 39%: medium, 29%: high, 15%), those unconcerned about climate change (47% vs. 16%), those who find it difficult to understand the language around climate change (50% vs. 16%) and those who think it is not important for them to personally take action to reduce climate change (48% vs. 17%).

Those more likely to **disagree** with this statement included: men (61% vs. 49%), consumers aged 35-59 (16-34, 57%: 35-59, 63%: 60+, 38%), those in lower social bands (ABC1, 71%: C2DE, 41%), those with a higher level of educational attainment (low, 35%: medium, 48%: high, 75%), those concerned about climate change (71% vs. 27%), those who find it easy to understand the language around climate change (73% vs. 20%) and those who think it is important for them to personally take action to reduce climate change (70% vs. 21%).

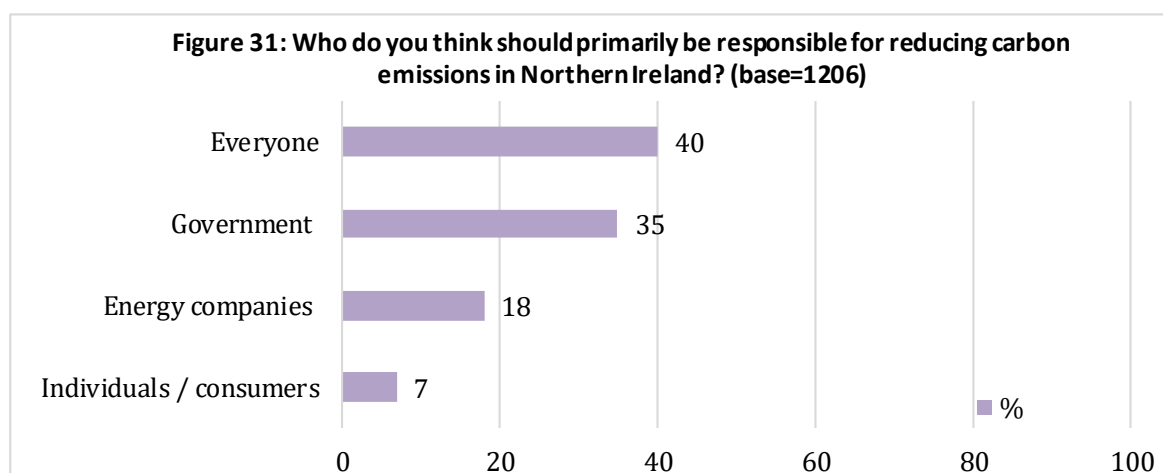
7.3 Conclusions / Recommendations: Initiatives and Consumer Attitudes

- With the sole exception of mandatory policies such as no oil boilers or no diesel vehicles after a certain date, consumers were overwhelmingly supportive of a range of potential government initiatives to support consumers to reduce their carbon emissions (*e.g. educational programmes / awareness raising campaigns, organisations working with consumers to support them to change their behaviours etc.*).
- As with the other research findings, consumer views on possible policy interventions to help support consumers to reduce their carbon emissions positively correlate with key factors such as age, social band, educational attainment level etc. The recurring theme is that consumers from particular groups (*e.g. younger consumers, those with a higher level of educational attainment, those on higher incomes and those from higher social bands etc.*), are more likely to be supportive of potential government initiatives, with significantly lower levels of support recorded by those in other consumer groups (*e.g. older consumers, those with a lower level of educational attainment, those on lower incomes, those less likely to be concerned about climate change etc.*). Again the research evidence clearly highlights those groups which policy makers need to target to help accelerate positive behaviour change in seeking to further reduce carbon emissions.
- Interestingly, although a majority are supportive of financial incentives to encourage consumers to change their behaviour, just over half indicated that a financial incentive would make them more likely to install low carbon technology or energy efficiency measures or purchase an electric vehicle or hybrid. It is recommended that this difference between support for financial incentives, and consumer likelihood of actually engaging in positive behaviour change, be explored through further research.

8. Reducing Carbon Emissions and Willingness to Pay

8.1 Primary Responsibility for Reducing Carbon Emissions

Four out of ten (40%) consumers said that everyone should be responsible for reducing carbon emissions in Northern Ireland, with 35% supporting the view that government should be primarily responsible. Eighteen percent of consumers believe that energy companies should primarily be responsible, with 7% saying that individuals / consumers should be primarily responsible.



Differences between Consumer Groups (statistically significant)

- Consumers aged 35-59 were proportionately more likely to say that everyone should be responsible for reducing carbon emissions in Northern Ireland (16-34, 39%: 35-59, 45%: 60+, 33%), whereas older consumers were proportionately more likely to say that energy companies (16-34, 18%: 35-59, 16%: 60+, 22%) and government (16-34, 36%: 35-59, 32%: 60+, 39%) should be primarily responsible
- Those in higher social bands were more likely to say that everyone should be responsible for reducing carbon emissions in Northern Ireland (ABC1, 50%: C2DE, 31%), whereas proportionately more consumers in lower social bands said energy companies (C2DE, 24%: ABC1, 11%) and government (C2DE, 38%: ABC1, 31%) should be primarily responsible
- Consumers with a higher level of educational attainment were proportionately more likely to say that everyone should be responsible for reducing carbon emissions in Northern Ireland (low, 26%: medium, 39%: high, 49%), whereas those with the lowest level of educational attainment were proportionately more likely to say energy companies should be primarily responsible (low, 33%: medium, 17%: high, 11%)
- Consumers who believe that it is important that they personally take action to reduce carbon emissions were proportionately more likely to say that everyone should be responsible for reducing carbon emissions in Northern Ireland (important, 50%: not important, 16%: don't know, 29%). Consumers who said that it is not important that they personally take action to reduce carbon emissions were proportionately more likely to say that government

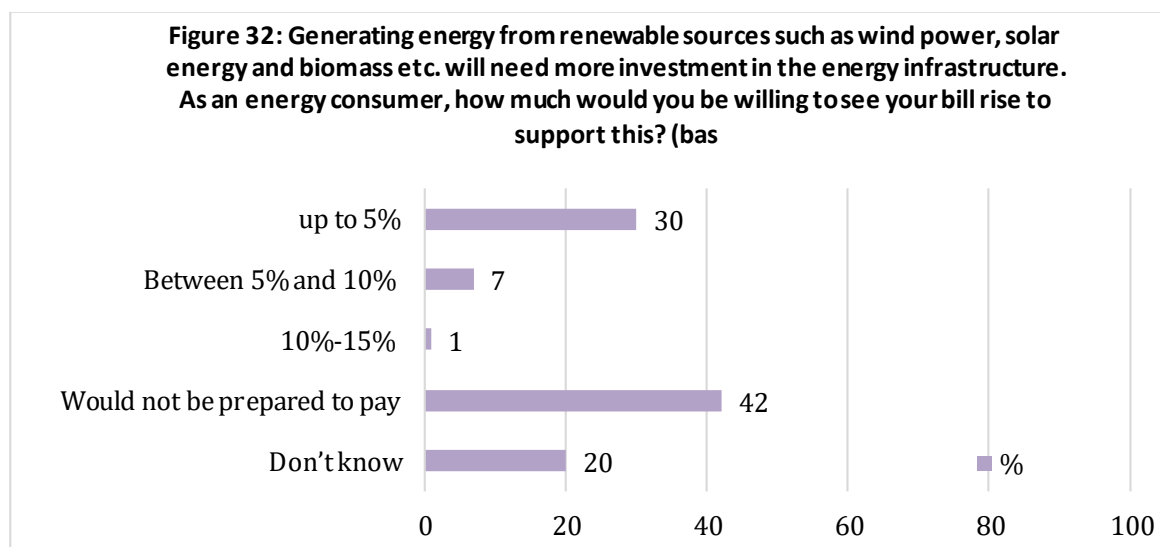
should be primarily responsible for reducing carbon emissions in Northern Ireland (important, 28%; not important, 55%; don't know, 26%)

8.2 Willingness to Pay for Investment in Energy Infrastructure

Consumers were advised that generating energy from renewable sources such as wind power, solar energy and biomass etc. will need more investment in the energy infrastructure. With this information, consumers were then asked how much they would be willing to see their bill rise to support this.

Figure 32 shows that 38% of consumers said they would be willing to see their bill rise to support the generation of energy from renewable sources (30% would accept an increase of 5% in their bill; 7% would accept an increase of between 5% and 10%; 1% would accept an increase of between 10% and 15%).

A significant number (42%) of consumers said they would not be prepared to pay for investment in energy infrastructure so support renewables, with one in five (20%) undecided.



Differences between Consumer Groups (statistically significant)

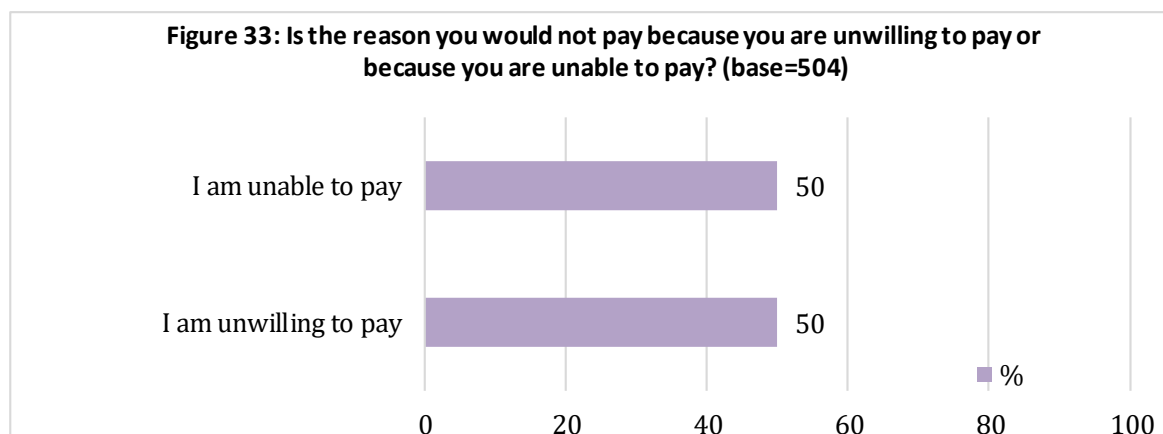
Willingness to Pay to Support Investment in Energy Infrastructure

- Men (47% vs. 31%) were more likely to say they would be willing to accept some increase in their bill for more investment in the energy network, whereas proportionately more women said they would not be prepared to pay (48% vs. 35%)
- Consumers aged under 60 were more likely to say they would be willing to accept some increase in their bill for more investment in the energy network (16-34, 38%; 35-59, 45%; 60+, 26%), whereas a majority of older consumers said they would be unwilling to pay (16-34, 41%; 35-59, 35%; 60+, 55%)
- Those in higher social bands (ABC1, 55%; C2DE, 23%) were more likely to say they would be willing to pay with most consumers in lower social bands saying they would not (C2DE, 58%; ABC1, 23%)

- Those with a higher level of educational attainment were more likely to say they would be willing to accept some increase in their bill for more investment in the energy network (low, 13%: medium, 30%: high, 62%), whereas proportionately more consumers with the lowest level of educational attainment said they would not be prepared to pay (low, 73%: medium, 45%: high, 20%)
- Most consumers living in households in receipt of Universal Credit would not be prepared to pay an increase in their energy bill to support investment in the energy network (65% vs. 34%), whereas proportionately more of those in households not in receipt of Universal Credit said they would accept an increase in their energy bill (44% vs. 22%)
- Most Higher income consumers said they would be prepared to pay an increase in their energy bill to support investment in the energy network (= \pounds 20K, 16%: \pounds 20K- \pounds 40K, 45%: \pounds 40K, 74%), whereas most of those on low incomes saying they would be unwilling to pay (= \pounds 20K, 65%: \pounds 20K- \pounds 40K, 38%: \pounds 40K, 12%)
- Those with prepayment meters were less likely to say they would be prepared to pay an increase in their energy bill to support investment in the energy network (22% vs. 44%), with most in this group saying they would be unwilling to pay (58% vs. 35%)
- Half (50%) of consumers who believe that it is important that they personally take action to reduce carbon emissions said they would be willing to accept an increase in their energy bill to support investment in the energy network. This compares with 11% of those who believe it is not important that they personally take action to reduce carbon emissions.
- Consumers more likely to engage in behaviours which limit climate change were more likely to say they would accept an increase in their energy bills to pay for investment in the energy infrastructure (e.g. choose to walk, cycle or use public transport instead of using a car: 46% vs. 25%; think about energy efficiency products and appliances: 53% vs. 20%; minimise the amount of energy used in the home: 76% vs. 44% etc.)
- Consumers who indicated that they are willing to accept an increase in their energy bills were more likely to say they have already or would be likely to purchase or install:
 - *low carbon technologies (willing to pay, 77%; unwilling to pay, 24%: don't know, 47%)*
 - *energy efficiency measures (willing to pay, 82%; unwilling to pay, 35%: don't know, 61%) and,*
 - *electric vehicles or hybrids (willing to pay, 62%; unwilling to pay, 12%: don't know, 21%)*

8.2.1 Reasons Not Prepared to Pay for Investment

Among consumers (n=504) who said they would not be prepared to pay for changes to the energy infrastructure to support renewables, half (50%) said they would be unwilling to pay with half (50%) saying they would be unable to pay.



Differences between Consumer Groups (statistically significant)

Being Unprepared to Pay (differences by groups)

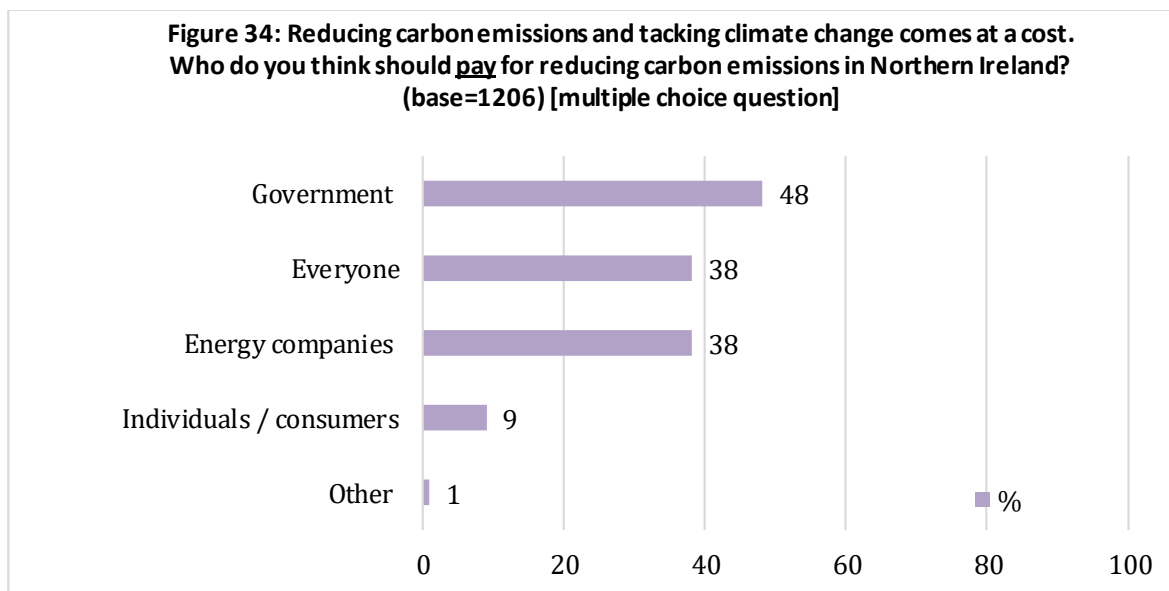
- Men (59% vs. 44%) were more likely to say they would be unwilling to pay whereas a greater proportion of women said they would be unable to pay (56% vs. 41%)
- Consumers aged over 35 were more likely to say they would be unwilling to pay (16-34, 37%: 35-59, 55%: 60+, 55%), whereas younger consumers were proportionately more likely to say they would be unable to pay (16-34, 63%: 35-59, 45%: 60+, 45%)
- ABC1 consumers were more likely to say they would be unwilling to pay (63% vs. 45%) with C2DE consumers more likely to say they would be unable to pay (55% vs. 37%)
- A greater proportion of Consumers with a higher level of educational attainment said they would be unwilling to pay (low, 40%: medium, 50%: high, 67%) whereas most of those with a lower level of educational attainment said they would be unable to pay (low, 60%: medium, 50%: high, 33%)
- Proportionately more consumers on higher incomes said they would be unwilling to pay (\leq £20K, 33%: £20K-£40K, 56%: >£40K, 73%) whereas proportionately more consumers on lower incomes said they would be unable to pay (\leq £20K, 67%: £20K-£40K, 44%: >£40K, 27%)
- More consumers living in households in receipt of Universal Credit said they would be unable to pay (72% vs. 38%) whereas more consumers living in households not in receipt of Universal Credit said they would be unwilling to pay (62% vs. 28%)

- Those with prepayment meters were more likely to say they would be unable to pay (62% vs. 42%) whereas those in households without a prepayment meter were more likely to say they would be unwilling to pay (58% vs. 38%)

8.2.2 Paying for Reducing Carbon Emissions in N Ireland

Given that reducing carbon emissions and tackling climate change comes at a cost, consumers were asked who they think should pay for reducing carbon emissions in Northern Ireland.

Figure 34 shows that just under half (48%) of consumers said that government should pay for reducing carbon emissions, 38% said everyone, 38% energy companies and 9% individuals / consumers.



Differences between Consumer Groups (statistically significant)

Individuals / Consumers should pay

- Consumers with a higher level of educational attainment were more likely to say that individuals / consumers should pay for reducing carbon emissions in Northern Ireland (low, 5%: medium, 8%: high, 11%)

Government should pay

- Consumers in lower social bands were more likely to support this view (ABC1, 41%: C2DE, 53%)
- Those with a lower level of educational attainment were more likely to support this view (low, 55%: medium, 51%: high, 40%)
- Those on lower incomes were more likely to support this view (≤£20K, 54%: £20K-£40K, 43%: >£40K, 35%)

- Those in households in receipt of Universal Credit were more likely to support this view (58% vs. 44%)
- Consumers who believe that it is not important (70%) that they personally take action to reduce carbon emissions were more likely to say that government should pay for reducing carbon emissions in Northern Ireland (important, 40%; don't know, 39%)

Energy Companies should pay

- Consumers in lower social bands were more likely to support this view (ABC1, 33%; C2DE, 42%)
- Those with a lower level of educational attainment were more likely to support this view (low, 54%; medium, 36%; high, 31%)
- Those on lower incomes were more likely to support this view (= \leq £20K, 50%; £20K-£40K, 37%; >£40K, 38%)
- Consumers who believe that it is not important, or who were undecided when asked if they personally should take action to reduce carbon emissions, were more likely to say that energy companies should pay (important, 34%; not important, 47%; don't know, 45%)

Everyone should pay

- Consumers aged 35-59 were more likely to support this view (16-34, 37%; 35-59, 43%; 60+, 30%)
- Consumers in higher social bands were more supportive of this view (ABC1, 49%; C2DE, 28%)
- Consumers with a higher level of educational attainment were more likely to say that everyone should pay (low, 18%; medium, 35%; high, 52%)
- Those on higher incomes were more likely to support this view (= \leq £20K, 25%; £20K-£40K, 44%; >£40K, 60%)
- Those living in households not in receipt of Universal Credit were more likely to support this view (43% vs. 23%)
- Consumers who believe that it is important that they personally take action to reduce carbon emissions were more likely to say that everyone should pay (important, 49%; not important, 10%; don't know, 31%)

8.3 Conclusions / Recommendations: Willingness to Pay

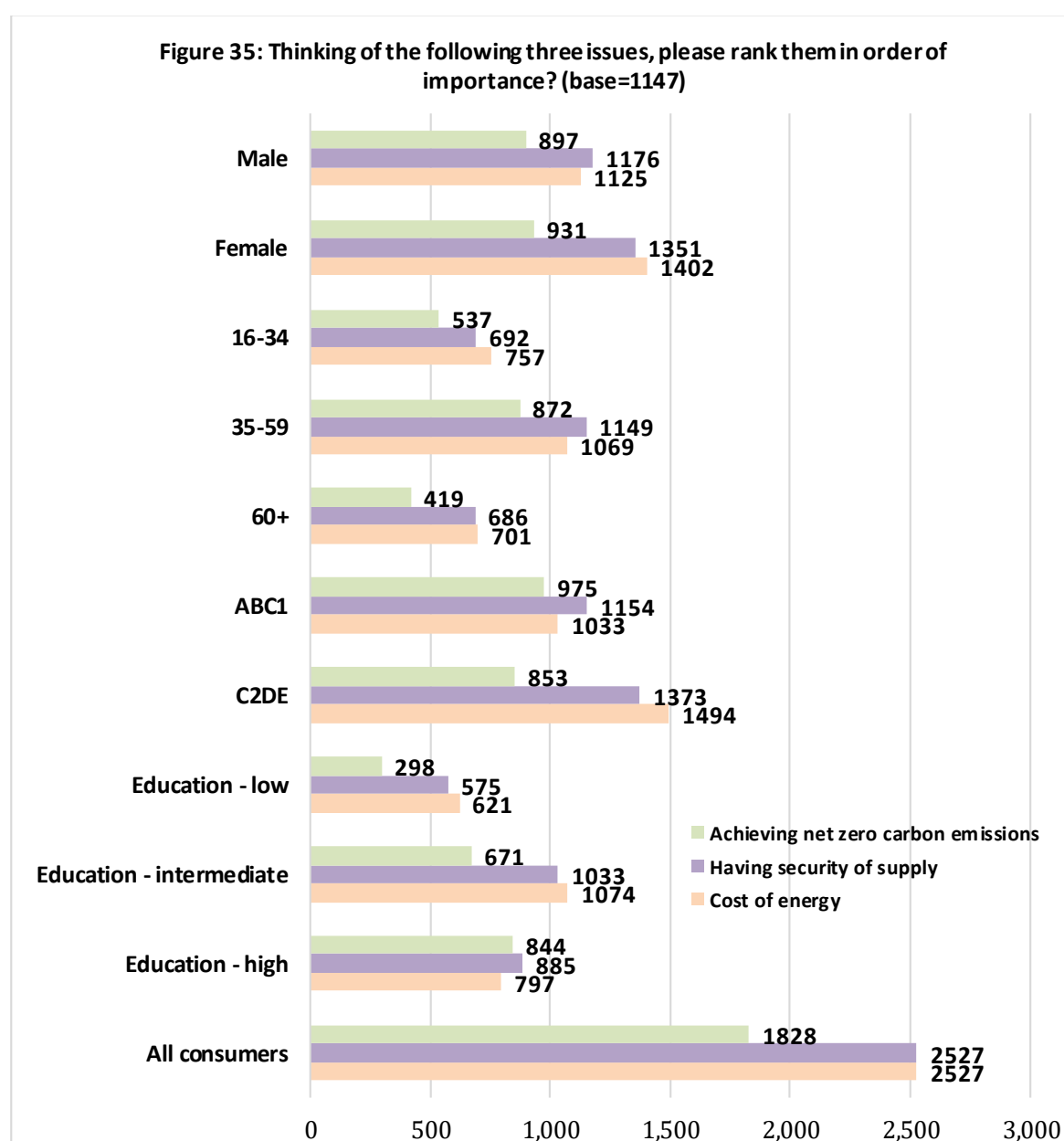
- The research shows that consumers appear to be split on who should be responsible for reducing carbon emissions in Northern Ireland, with similar numbers of the view that it should be government's and everyone's responsibility.
- Opinion on who should pay for reducing carbon emissions in Northern Ireland, is also divided. Almost half believe it should be the government, with significant numbers of the view that it should be everyone and energy companies. Interestingly, less than one in ten specifically said individuals / consumers should pay.
- The survey findings provide a useful measure of where consumers are in terms of their willingness to pay for investment in the energy infrastructure to support renewables, with just over a third willing to do so. This information has been analysed by consumer characteristics, with those willing to pay more likely to come from particular groups (*e.g. those from higher income groups, higher social bands, being more concerned about climate change etc.*), with the inverse true for those from lower income groups, those less knowledgeable of climate change etc.,.
- Moving forward it will be important to measure change on the indicator of willingness to pay, particularly given the significant number of consumers who say they do not want to pay, with half of this group unwilling to pay and the other half saying they are unable to pay. Other research should be undertaken to better understand the reasons why consumers are unwilling to pay, and to explore what factors would motivate a change in viewpoint.

9. Energy Priorities and Consumer Concerns

9.1 Ranked Importance of Different Energy Issues

Consumers were advised that there are areas related to energy and climate change that need decisions from government. They were then asked to prioritise the importance of each of the following: achieving net zero carbon emissions; having security of supply; and, the cost of energy.

Consumer responses were weighted (most important, scored 3: 2nd in importance, scored 2: third in importance, scored 1) and summed to give an overall score with a higher score noting greater importance. Figure 35 shows that among all consumers, cost of energy and security of supply were ranked equal in importance with a score of 2527, followed by net zero carbon emissions (1828).



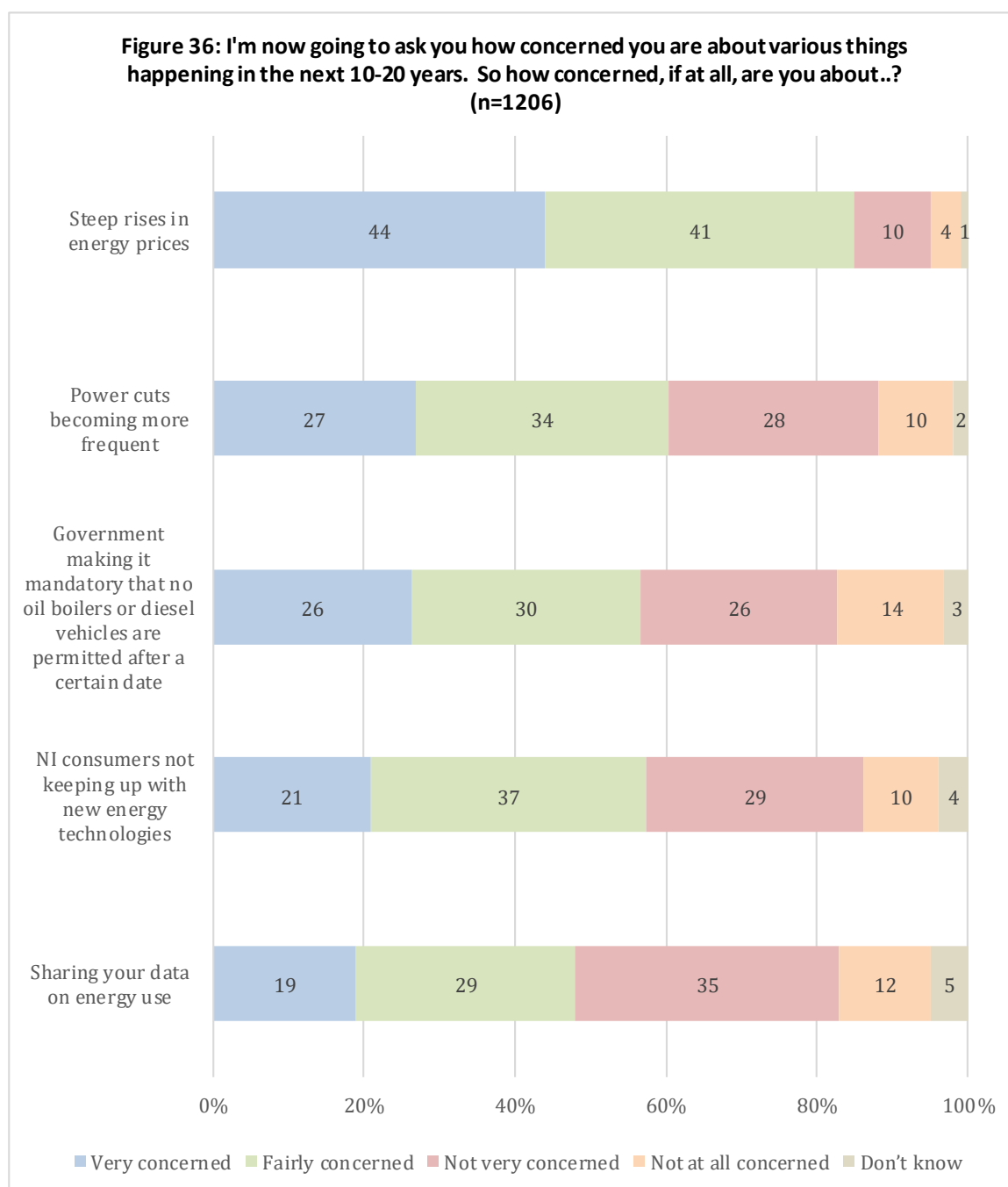
Differences between Consumer Groups

- Men were more likely to rank security of supply as most important whereas women were more likely to rank cost of energy as most important
- Younger and older consumers were more likely to rank cost of energy as most important whereas those aged 35-59 were more likely to rank security of supply most important
- Security of supply was most important for ABC1 consumers whereas cost of energy was most important for consumers in social classes C2DE
- Security of supply was most important for consumers with a higher level of educational attainment whereas cost of energy was more important for consumers with relatively lower levels of educational attainment

9.2 Concerns about Energy Related Issues in the Future

Consumers were asked how concerned they are about various energy related things happening in the next 10-20 years.

Figure 36 shows that consumers were most concerned [85%] about steep rises in energy prices ('very concerned', 44%; 'fairly concerned', 41%) and least concerned [48%] about sharing their data on energy use ('very concerned', 19%; 'fairly concerned', 29%).



Differences between Consumer Groups (statistically significant)

More likely to be concerned about **steep rises in energy prices**

- C2DE (88% vs. ABC1, 83%)
- Consumers with relatively low levels of educational attainment (low, 91%: medium, 89%: high, 80%)

More likely to be concerned about **power cuts becoming more frequent**

- C2DE (63% vs. ABC1, 59%)
- Consumers with medium educational attainment (low, 56%: medium, 67%: high, 57%)

More likely to be concerned about **government making it mandatory that no oil boilers or diesel vehicles are permitted after a certain date**

- Consumers with relatively low levels of educational attainment (low, 56%: medium, 47%: high, 45%)

More likely to be concerned about **NI consumers not keeping up with new energy technologies**

- Consumers under the age of 60 (16-34, 57%: 35-59, 63%: 60+, 50%)
- ABC1 (65% vs. C2DE, 52%)
- Consumers with a higher level of educational attainment (low, 52%: medium, 55%: high, 64%)

More likely to be concerned about **sharing data on energy use**

- C2DE (60% vs. ABC1, 52%)
- Consumers with relatively low levels of educational attainment (low, 65%: medium, 63%: high, 43%)

9.3 Conclusions and Recommendations: Importance of Energy Issues

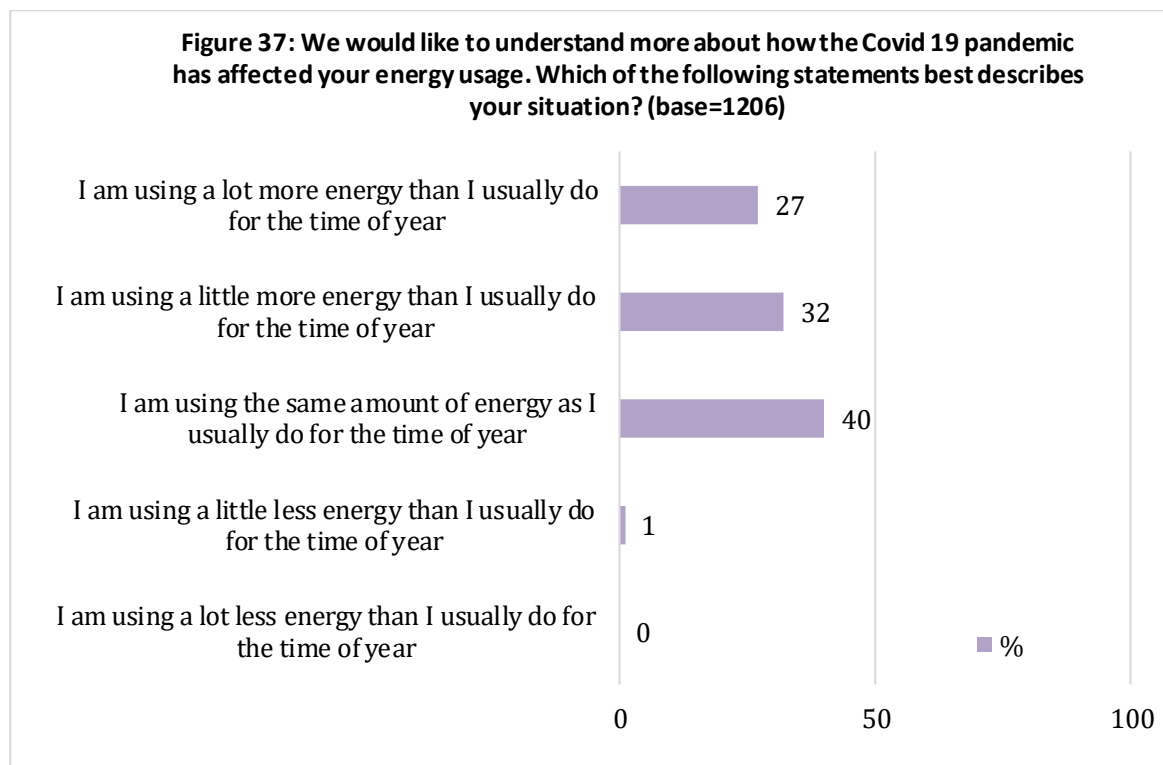
- In terms of energy priorities moving forward, consumers are split between the cost of energy and security of supply, with both ranked the same in terms of overall importance. Achieving net zero carbon emissions was ranked lowest in terms of importance.
- Analysis by particular consumer groups showed that those more likely to perceive cost as most important included: women; older consumers; those in lower social bands; and, those with a lower level of educational attainment. Conversely, security of supply was more important for: men; 35-59 year olds; those in higher social bands; and, those with a higher level of educational attainment. Note that across all key consumer groups, and with the sole exception of those with a higher level of educational attainment ranking achieving net zero carbon emissions second in importance, all other groups ranked achieving net zero carbon emissions lowest in importance.
- The survey findings provide stark evidence that achieving net carbon emissions, relative to cost and security of supply, is perceived as a lesser priority among consumers. Indeed looking to the future, the possibility of steep energy prices is a concern for the overwhelming majority of consumers, and trumps other possible concerns such as sharing data on energy use, and Northern Ireland consumers keeping up to date with new energy technologies. Policy responses will need to reflect consumer sentiment regarding priorities, and the challenge will be to raise consumer knowledge and awareness to elevate the importance of net zero relative to cost and security of supply.

10. Impact of Covid-19 on Energy Use

10.1 Change in Use of Energy

Consumers were asked about how the Covid 19 pandemic had affected their energy usage, with almost six out of ten (59%) saying they are using more energy than usual for this time of year ('...a lot more..', 27%; '...a little more...' (32%).

Forty percent (40%) of consumers said they are using the same amount of energy as they usually do for this time of year, with 1% using a little less energy than usual.



Differences between Consumer Groups (statistically significant)

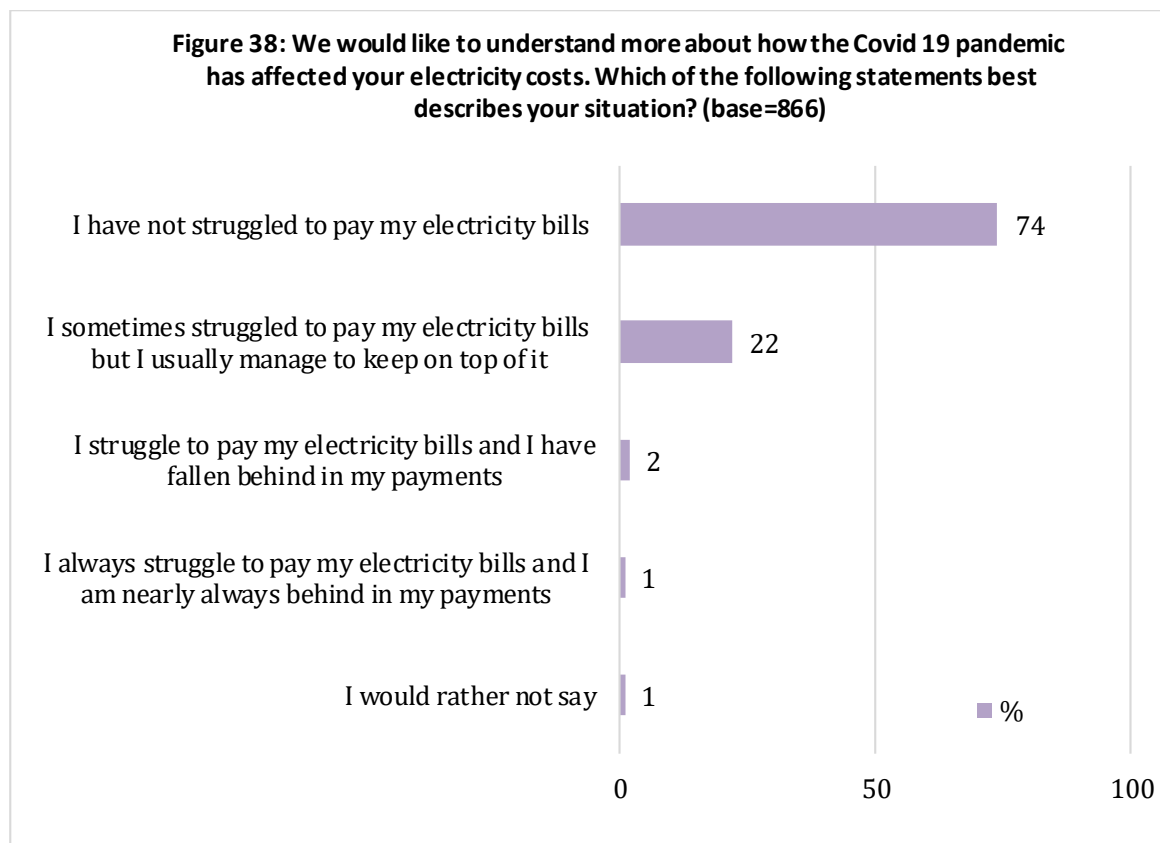
Groups more likely to say they are using more energy

- Women compared with men (64% vs. 55%)
- Younger consumers (16-34, 67%: 35-59, 62%: 60+, 48%)
- Higher level of educational attainment (low, 46%: medium, 69%: high, 57%)
- Those on moderate incomes (<=£20K, 61%: £20K-£40K, 77%: >£40K, 37%)
- Consumers using prepayment meters (69% vs. 55%)

10.2 Impact of Covid-19 on Electricity Costs: Electricity Credit Customers

Consumers paying their electricity bills by credit (e.g. direct debit, cheque etc.) were asked how the Covid 19 pandemic has affected their electricity costs.

Figure 38 shows that although most (74%) consumers did not struggle to pay their electricity bills, one in four (25%) did (*'I sometimes struggle but manage to keep on top of it'*, 22%; *'I struggle to pay my electricity bills and I have fallen behind in my payments'*, 2%; *'I always struggle to pay my electricity bills and I am nearly always behind in my payments'* 1%).



Differences between Consumer Groups (statistically significant)

Electricity credit consumers more likely to say they have *struggled*¹⁰ to pay their electricity bills during the pandemic

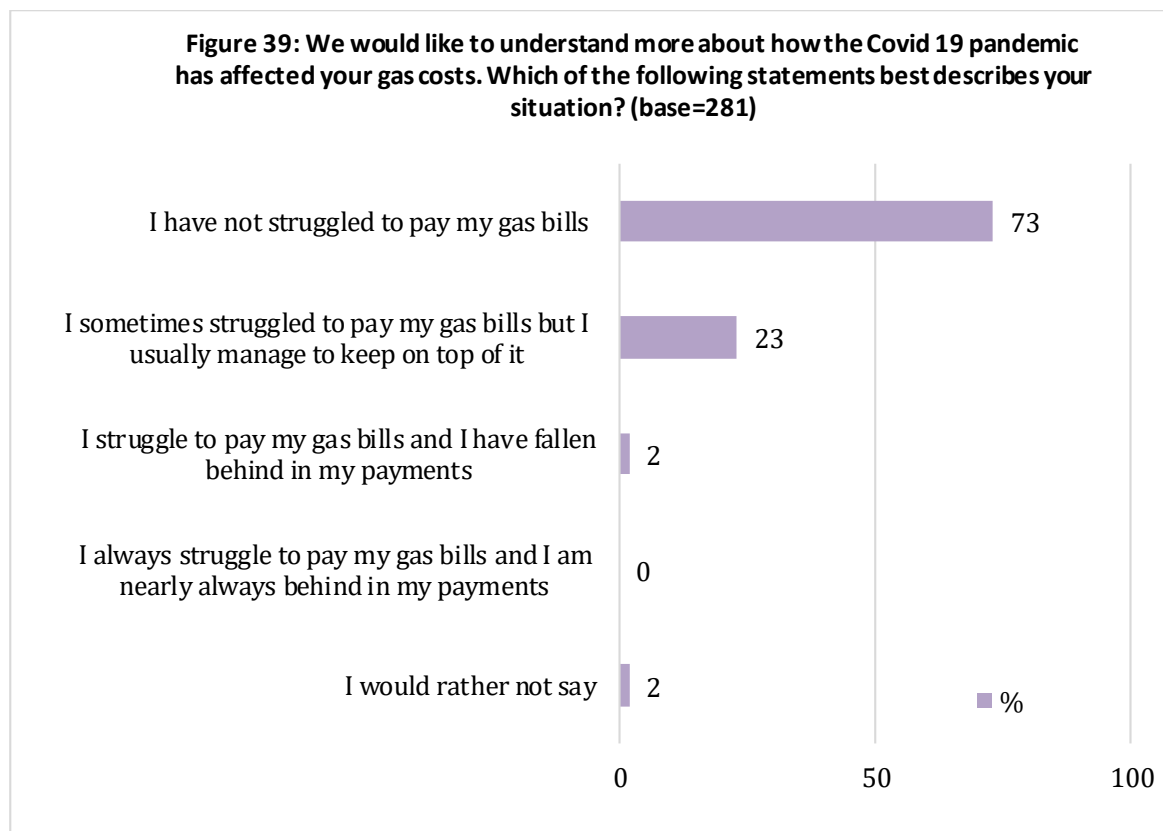
- Women compared with men (30% vs. 19%)
- Younger consumers (16-34, 31%; 35-59, 20%; 60+, 26%)
- Those in lower social bands (C2DE, 35%; ABC1, 16%)
- Lower level of educational attainment (low, 42%; medium, 29%; high, 12%)
- Those on lower incomes (<=£20K, 54%; £20K-£40K, 29%; >£40K, 8%)
- Consumers in households in receipt of Universal Credit (51% vs. 20%)

¹⁰ Includes: consumers who said they sometimes struggle but manage to keep on top of it, those who struggle to pay their electricity bills and have fallen behind in their payments, and those who always struggle to pay their electricity bills and are nearly always behind in their payments

10.3 Impact of Covid-19 on Gas Costs: Natural Gas Credit Customers

Consumers paying their gas bills by credit (e.g. direct debit, cheque etc.) were asked how the Covid 19 pandemic has affected their gas costs.

Figure 39 shows that although most (73%) consumers did not struggle to pay their gas bills, 25% did (*'I sometimes struggle but manage to keep on top of it'*, 23%; *'I struggle to pay my gas bills and I have fallen behind in my payments'*, 2%). Two percent of consumers said they preferred not to say when asked if they had struggled to pay their gas costs.



Differences between Consumer Groups (statistically significant)

Gas credit consumers more likely to say they have struggled¹¹ to pay their gas bills during the pandemic included:

- Women compared with men (31% vs. 19%)
- Younger consumers (16-34, 30%; 35-59, 21%; 60+, 29%)
- Those in lower social bands (C2DE, 36%; ABC1, 16%)
- Those with an intermediate level of educational attainment (low, 32%; medium, 37%; high, 11%)
- Those on low incomes (<=£20K, 53%; £20K-£40K, 33%; >£40K, 4%)
- Consumers in households in receipt of Universal Credit (42% vs. 21%)
- Almost all customers (98%) struggling with their gas bills are also struggling with their electricity bills

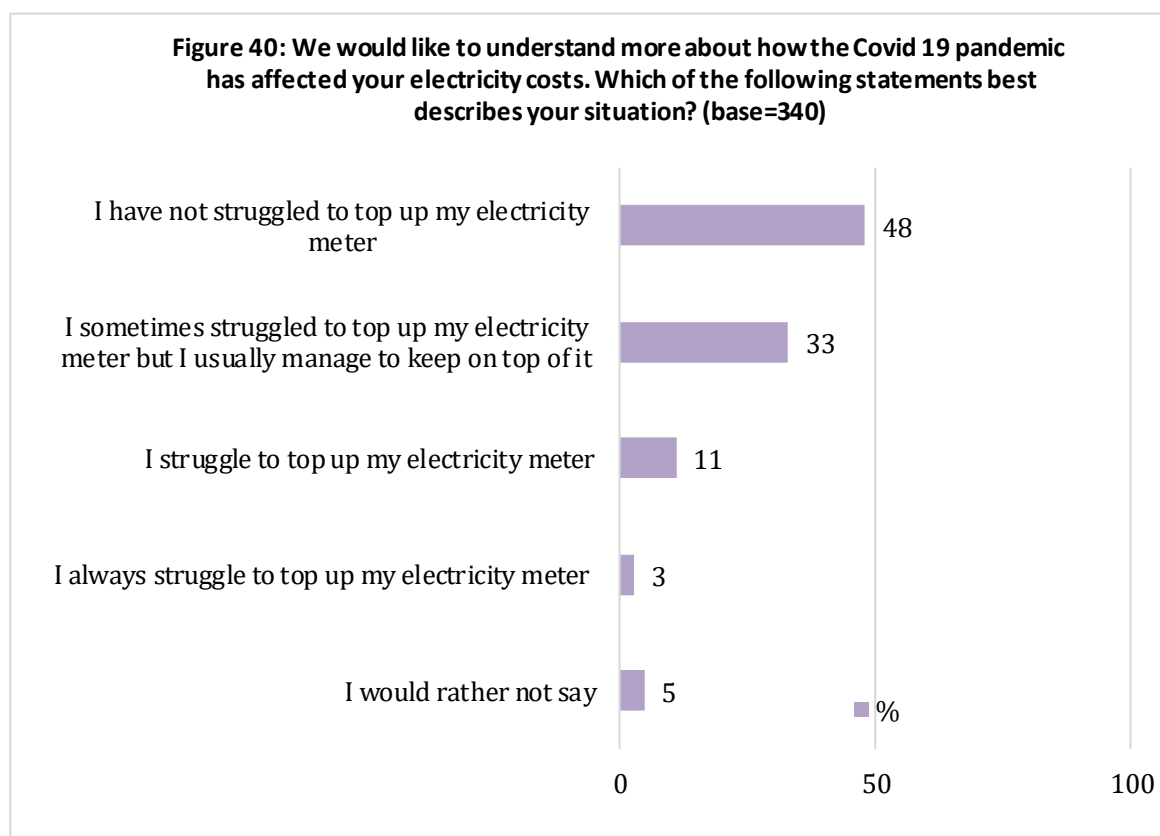
¹¹ Includes those who sometimes struggle to pay their gas bills but usually manage to keep on top of it, those struggling to pay their gas bills and have fallen behind on payments and those who always struggle to pay their gas bills and are nearly always behind on payments

10.4 Impact of Covid-19 on Electricity Costs: Electricity PPM Customers

Consumers using electricity prepayment meters were asked how the Covid 19 pandemic has affected their electricity costs.

Figure 40 shows that although 48% of electricity PPM consumers said they did not struggle to top up their electricity meter. However, a similar number did (47%) (*'I sometimes struggled to top up my electricity meter but usually manage to keep on top of it'*, 33%: *'I struggle to top up my electricity meter'*, 11%: *'I always struggle to top up my electricity meter'* 3%).

Five percent of consumers said they preferred not to say when asked if they had struggled to top up their electricity meter.



Differences between Consumer Groups (statistically significant)

Electricity PPM consumers more likely to say they have *struggled*¹² to top up their meter during the pandemic included:

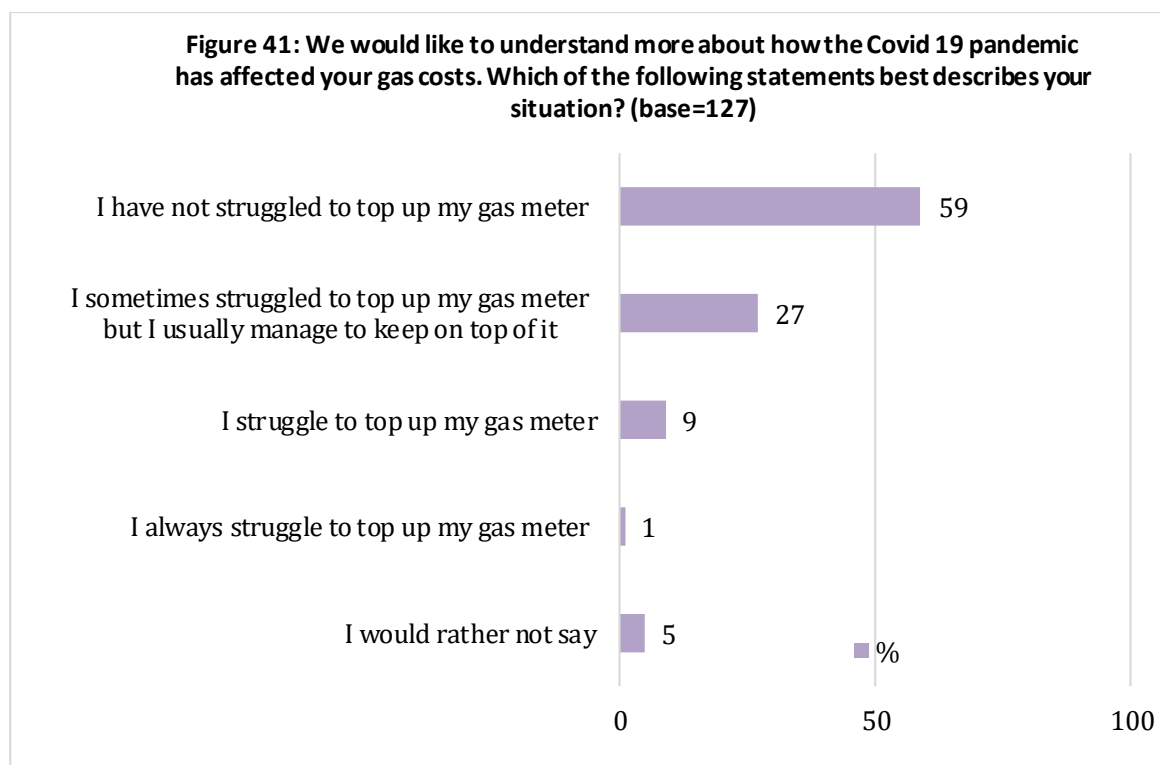
- Younger consumers (16-34, 66%: 35-59, 39%: 60+, 39%)
- Those in lower social bands (C2DE, 55%: ABC1, 37%)
- Lower level of educational attainment (low, 66%: medium, 48%: high, 41%)
- Those on lower incomes (<=£20K, 69%: £20K-£40K, 26%: >£40K, 0%)
- Consumers in households in receipt of Universal Credit (77% vs. 30%)

¹² Includes those who sometimes struggle to top up their electricity meter but usually manage to keep on top of it, those who struggle to top up their electricity meter, and those who always struggle to top up their electricity meter.

10.5 Impact of Covid-19 on Gas Costs: Natural Gas PPM Customers

Consumers using gas prepayment meters were asked how the Covid 19 pandemic has affected their gas costs.

Figure 41 shows that although 59% of gas PPM consumers said they did not struggle to top up their gas meter, more than one third (37%) did ('I sometimes struggled to top up my gas meter but usually manage to keep on top of it', 27%: 'I struggle to top up my gas meter', 9%: 'I always struggle to top up my gas meter' 1%). Five percent of consumers said they preferred not to say when asked if they had struggled to top up their gas meter.



Differences between Consumer Groups (statistically significant)

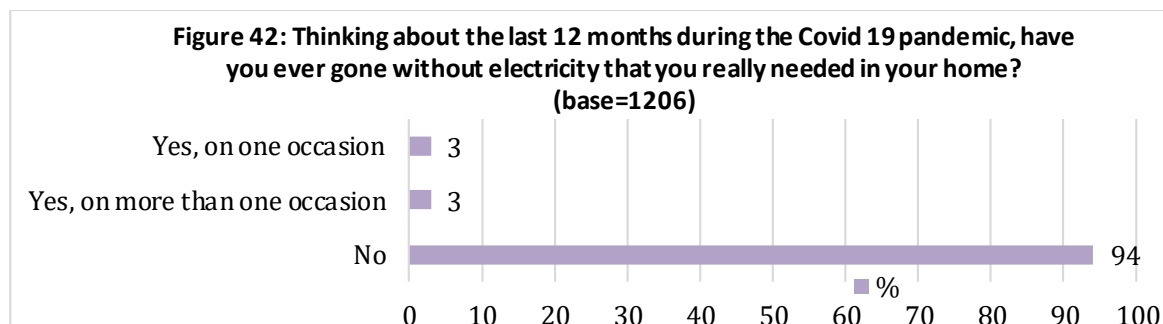
Gas PPM consumers more likely to say they have *struggled*¹³ to top up their meter during the pandemic included:

- Those in lower social bands (C2DE, 49%: ABC1, 17%)
- Lower level of educational attainment (low, 78%: medium, 33%: high, 21%)
- Those on lower incomes (<=£20K, 64%: £20K-£40K, 24%: >£40K, 0%)
- Consumers in households in receipt of Universal Credit (73% vs. 20%)

¹³ Includes those who sometimes struggle to top up their gas meter but usually manage to keep on top of it, those who struggle to top up their gas meter, and those who always struggle to top up their gas meter.

10.6 Going Without Electricity Really Needed in the Home (last 12 months)

Among all consumers, six percent (6%) said that in the last 12 months during the Covid 19 pandemic, they have gone without electricity that they really needed in their home (3% had gone without electricity on one occasion and 3% on more than one occasion).

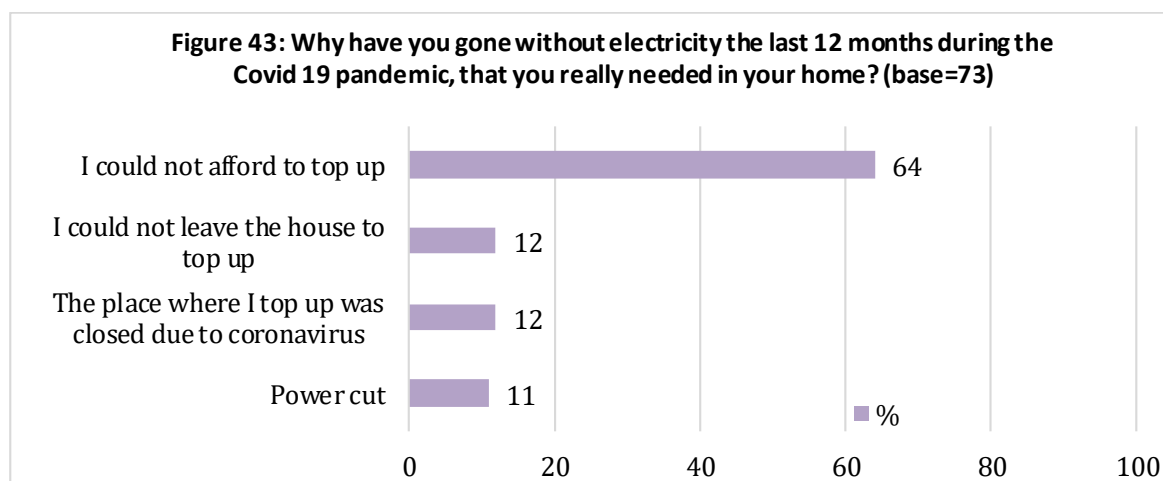


Differences between Consumer Groups (statistically significant)

Consumers more likely in the last 12 months, during the Covid 19 pandemic, to have gone without electricity that they really needed in their home included:

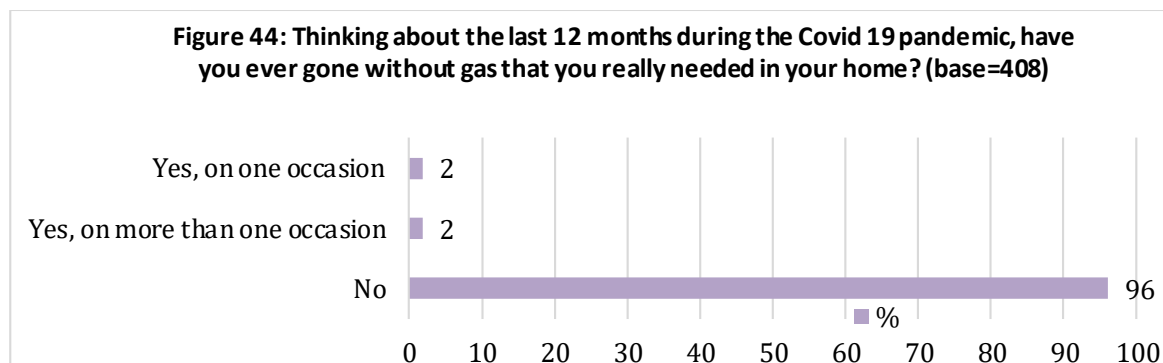
- Younger consumers (16-34, 11%: 35-59, 4%: 60+, 4%)
- Those in lower social bands (C2DE, 9%: ABC1, 3%)
- Lower level of educational attainment (low, 8%: medium, 7%: high, 4%)
- Those on lower incomes (<=£20K, 16%: £20K-£40K, 2%: >£40K, 0%)
- Consumers in households in receipt of Universal Credit (18% vs. 3%)
- Those using electricity prepayment meters (16% vs. 2%)
- Those using gas prepayment meters (13% vs. 2%)

Among those (n=73) who in the last 12 months had gone without electricity that they really needed in their home, the most common reason (64%, n=47) for doing so was being unable to afford to top up, 12% (n=9) said they couldn't leave their house to top up, 12% (n=9) said the place where they top up was closed, and 11% (n=8) said they couldn't top up because of a power cut (*note that these findings are based on a relatively small sample and caution should be exercised in extrapolating these figures to all consumers who have gone without electricity they really needed in their home*).



10.7 Going Without Gas Really Needed to Heat Home (last 12 months)

Among all natural gas consumers, four percent (4%) said that in the last 12 months, during the Covid 19 pandemic, they have gone without gas that they really needed in their home (2% had gone without gas on one occasion and 2% on more than one occasion).

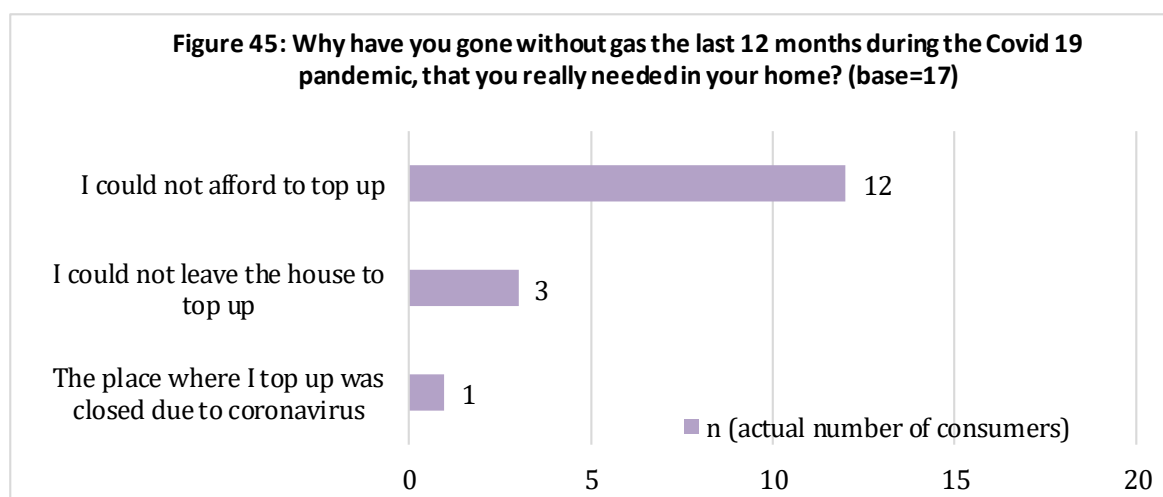


Differences between Consumer Groups (statistically significant)

Consumers more likely in the last 12 months, during the Covid 19 pandemic, to have gone without gas that they really needed in their home included:

- Younger consumers (16-34, 8%: 35-59, 2%: 60+, 3%)
- Those in lower social bands (C2DE, 6%: ABC1, 2%)
- Lower level of educational attainment (low, 9%: medium, 3%: high, 3%)
- Those on lower incomes (<=£20K, 11%: £20K-£40K, 1%: >£40K, 0%)
- Consumers in households in receipt of Universal Credit (13% vs. 2%)
- Gas prepayment meter customers (8% vs. 3%)

Among those (n=17) who in the last 12 months had gone without gas that they really needed in their home, the most common reason (n=12) for doing so was being unable to afford to top up, three said they couldn't leave their house to top up, with one consumer saying the place where they top up was closed (*note that due to the small sample size caution should be exercised in extrapolating these findings to all gas customers who have gone without gas that they really needed in their home*).

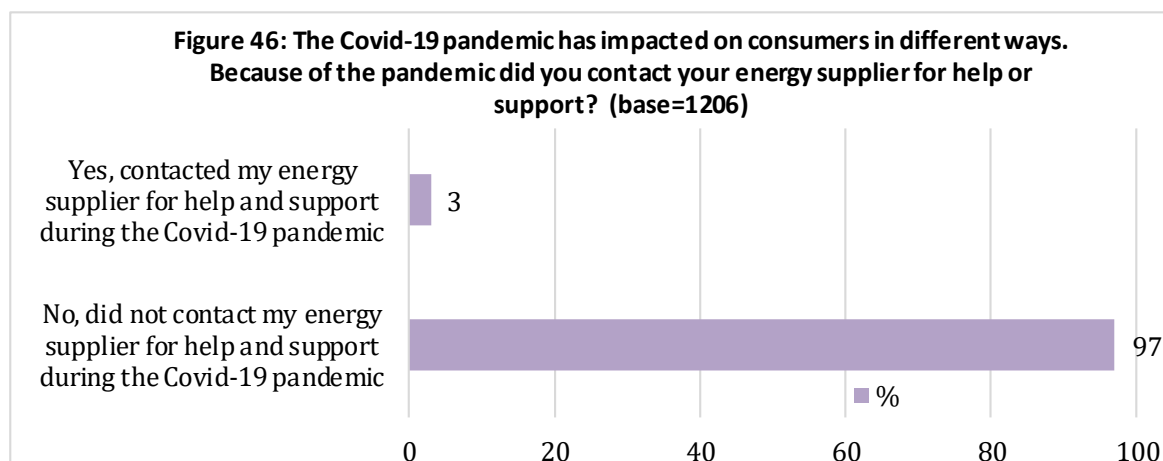


10.8 Conclusions / Recommendations: Impact of Covid-19 on Consumers

- The impact of Covid-19 has been significant on energy consumers in Northern Ireland, with most using more energy during the pandemic. With more energy being used it is unsurprising to find that approximately three out of ten consumers have struggled to pay their energy bills, with those using electricity and gas prepayment meters, those on low incomes, and those living in households in receipt of Universal Credit, more likely to report struggling to pay their bills.
- The survey has also provided estimates of the number of consumers who have had to go without electricity and gas that they needed during the pandemic, with consumer groups again more likely to be affected including younger consumers, those on lower incomes, those living in households in receipt of Universal Credit, and those using prepayment meters. Although the number of consumers identified in the survey who have had to go without electricity or gas is relatively small, and bearing in mind the need for caution when extrapolating these findings to all consumers who have had to go without energy they needed, the main issue for these consumers has been affordability. Among natural gas customers who had to go without electricity (n=27), most (n=16) said they also had to go without gas. Among customers who said they had to go without gas (n=17), almost all (n=16) said they also had to go without electricity they needed.
- Given the impact of Covid-19 on energy consumers, consideration should be given to ensuring that consumers adversely impacted by the pandemic are aware of help and support available. This should be a collective effort between key stakeholders including energy suppliers, consumer advice and support agencies, and the Utility Regulator.

11. Consumers Contacting Energy Suppliers for Help and Support

The Covid-19 pandemic has impacted on consumers in different ways, with 3% saying they contacted their energy supplier for help or support.



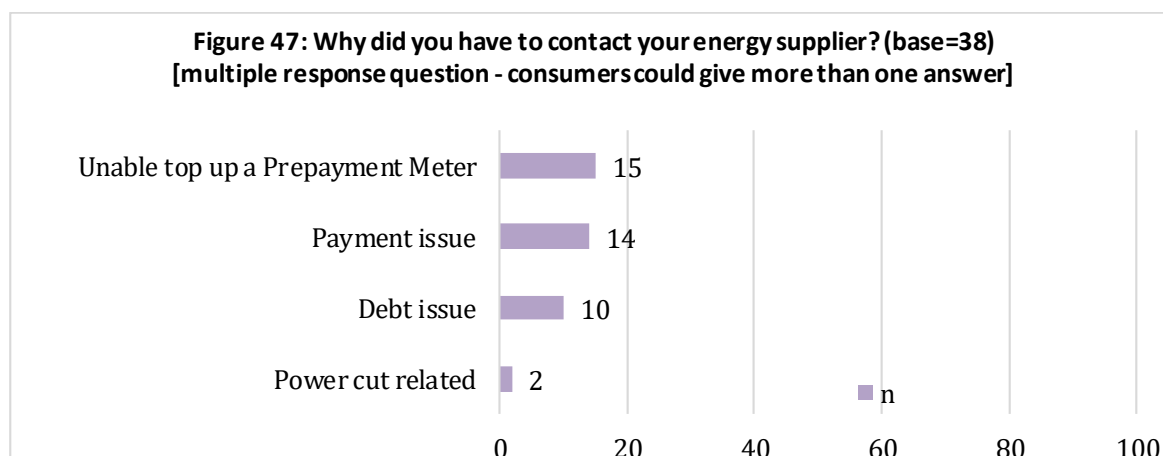
Differences between Consumer Groups (statistically significant)

Consumers more likely to have contacted their energy supplier for help or support included:

- Younger consumers (16-34, 5%: 35-59, 2%: 60+, 4%)
- Those in lower social bands (C2DE, 5%: ABC1, 1%)
- Consumers with relatively lower levels of educational attainment (low, 4%: medium, 4%: high, 2%)
- Those on lower incomes (<=£20K, 10%: £20K-£40K, 1%: >£40K, 0%)
- Consumers in households in receipt of Universal Credit (10% vs. 1%)

11.1 Reasons for Contacting Energy Suppliers for Help and Support

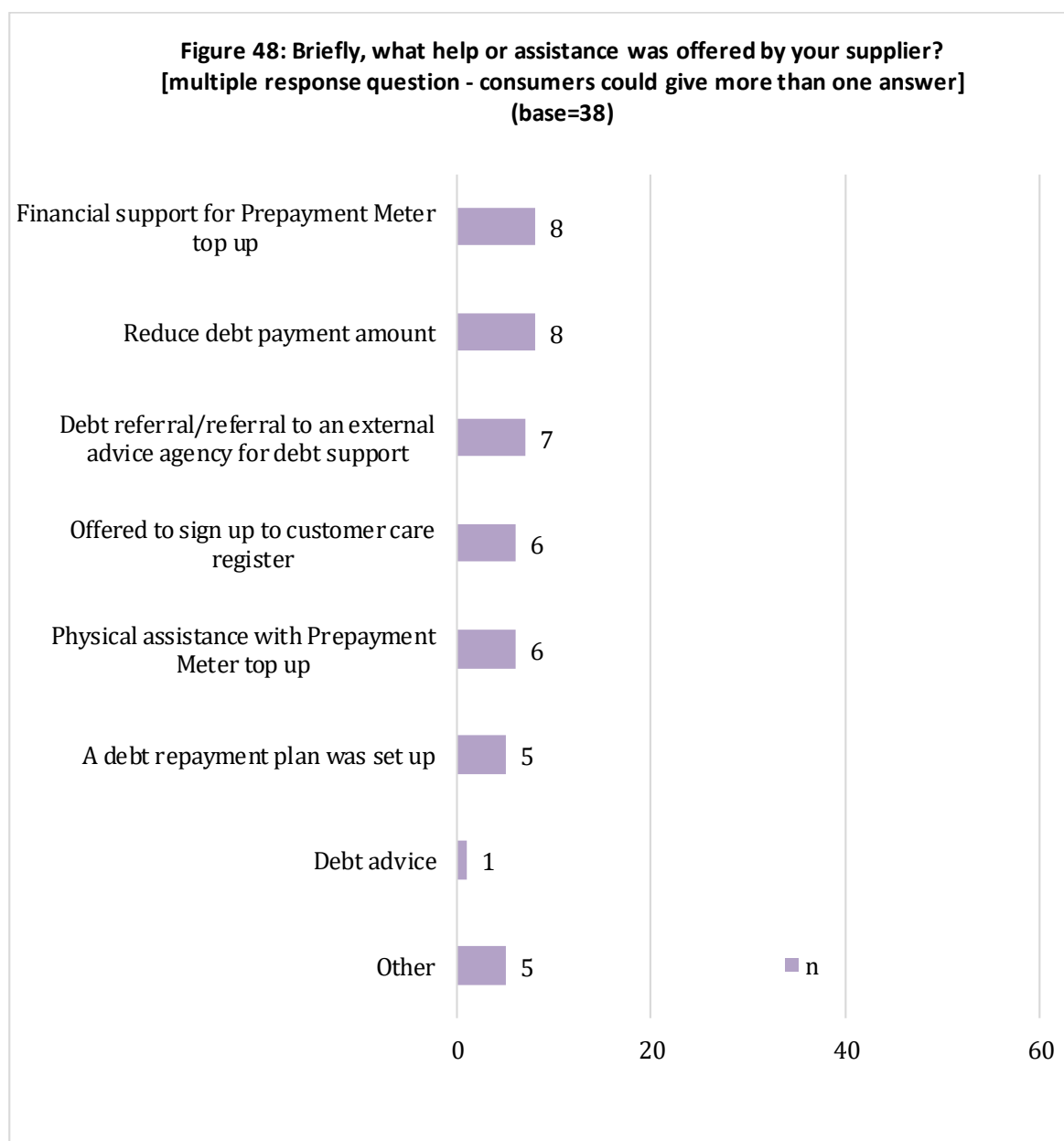
Among consumers (n=38) who contacted their energy supplier for help and support, 15 did so because they were unable to top up their meter, 14 had a payment issue, 10 had a debt issue and 2 did so because of a power cut (*please note that due to the relatively small sample size caution should be exercised in extrapolating these findings to all consumers contacting their energy suppliers*).



11.2 Assistance Offered to Consumer by Energy Suppliers

Among consumers (n=38) contacting their energy supplier for help and support, 8 said their energy supplier offered financial support for a prepayment top up, with the same number (n=8) contacting their energy supplier to reduce their debt amount.

Other outcomes from contacting energy suppliers included: debt referral / referral to an external advice agency for debt support (n=7); offer to sign up to a customer care register (n=6); physical assistance with prepayment meter top up (n=6); setting up of a debt repayment plan (n=5); and, debt advice (1). Five customers cited other outcomes¹⁴ (*please note that due to the relatively small sample size caution should be exercised in extrapolating these findings to all consumers contacting their energy suppliers*).



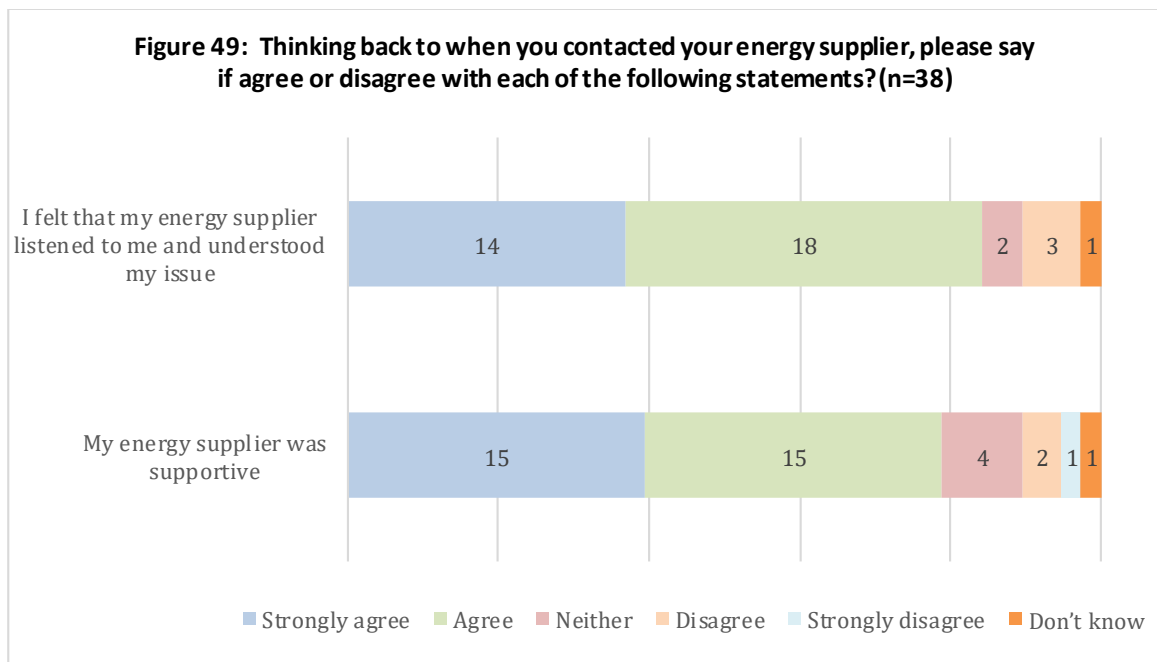
¹⁴ Included: querying a high charge (n=1); assistance with prepayment meter over the phone (n=1); referred to Citizens Advice (n=1); and, advice on a power cut (n=2).

11.3 Views on Help and Support Provided by Energy Suppliers

Consumers who had contacted their energy supplier for help and support were presented with two statements about their contact experience and asked to what extent they agreed with each (*again please note that due to the relatively small sample size caution should be exercised in extrapolating these findings to all consumers contacting their energy suppliers*).

Figure 49 shows that 32 consumers agreed with the statement '*I felt that my energy supplier listened to me and understood my issue*' ('strongly agree', 14; 'agree', 18), with 2 neither agreeing nor disagreeing and 3 disagreeing ('disagree', 3; 'strongly disagree', 0). One consumer was undecided.

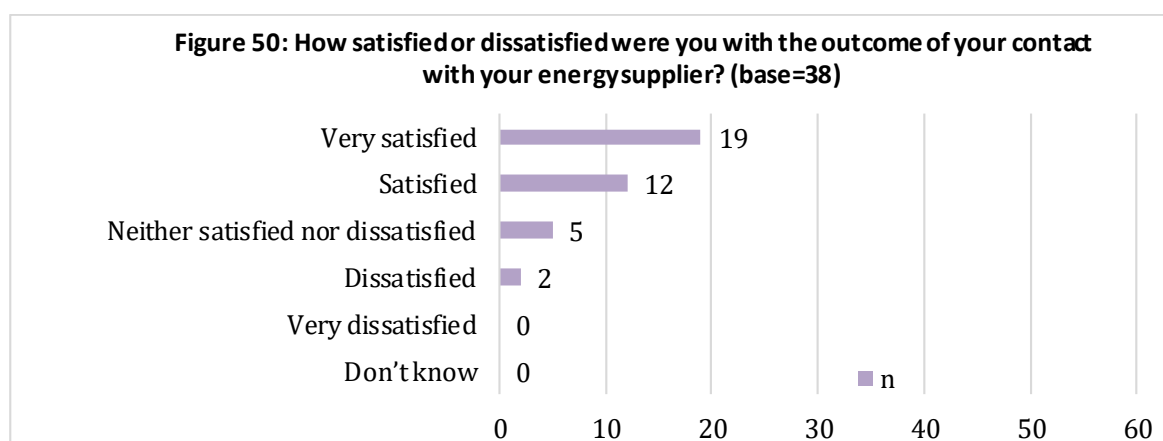
There was a similarly high level of agreement (30 consumers agreed) with the statement '*my energy supplier was supportive*' ('strongly agree', 15; 'agree', 15), with 4 neither agreeing nor disagreeing and 3 disagreeing ('disagree', 2; 'strongly disagree', 1). One consumer was undecided.



11.4 Satisfaction with Outcome of Contact with Energy Supplier

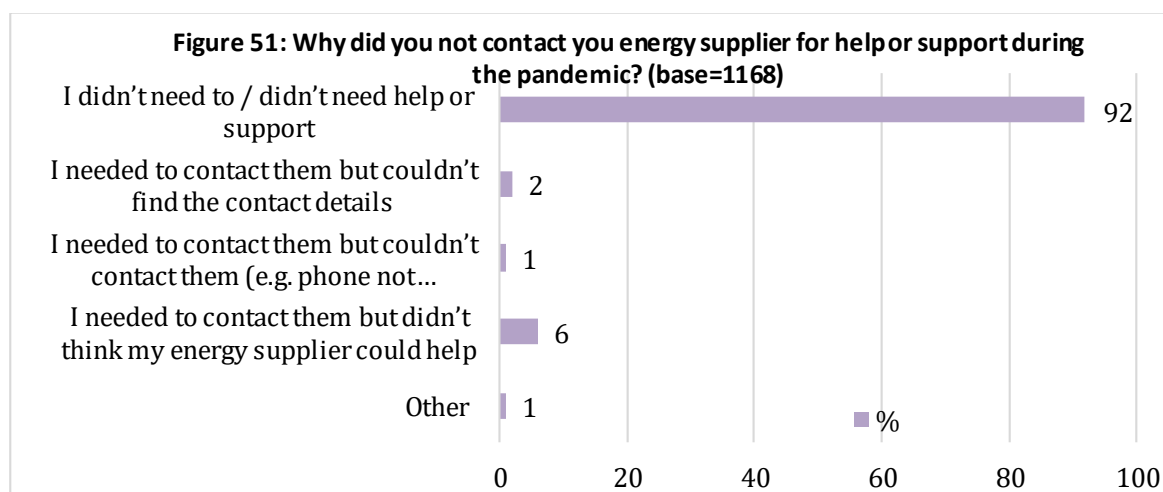
Of the 38 consumers who contacted their energy supplier for help and support, 31 were satisfied with the outcome ('very satisfied', 19; 'satisfied', 12), 5 were 'neither satisfied nor dissatisfied', with 2 'dissatisfied' (*again please note the relatively small sample size and the need for caution when extrapolating these findings to all consumers contacting their energy suppliers*).

The reasons two consumers were dissatisfied with the outcome of their contact were that they didn't feel their energy supplier was being reasonable or understanding regarding the charge on their account, and that their energy company was difficult to contact and was not very helpful with information.



11.5 Reasons Why Consumers did not Contact their Energy Supplier

The main reason why consumers did not contact their energy supplier for help or support during the pandemic was that they didn't need help or support (92%), with 2% saying they needed to contact them but couldn't find their contact details. One percent said they needed to contact their energy supplier but couldn't contact them (e.g. phone not answered, no one responded etc.), with 6% saying they needed to contact them but didn't think their energy supplier could help. One percent offered other reasons for not contacting their energy supplier during the pandemic (i.e. got help from family [n=1] and not knowing they could provide support [n=1]).



11.6 Conclusions and Recommendations: Contact with Energy Suppliers

- A relatively small number of consumers reported contacting their energy supplier for help and support during the pandemic. Although the number of consumers contacting their energy supplier is small (*and again acknowledging the need for caution in extrapolating these findings to all consumers who have contacted their energy supplier*), the data from this survey provide some insight into consumer experience, with consumers generally positive in their assessment of the help and support offered, as well as the overall outcome of their contact.
- Among consumers who said they had *not* contacted their energy supplier during the pandemic, a significant number did say they needed to contact them, with some reporting difficulty in finding contact details or not being able to contact them (*e.g. not being able to get through by phone*). There were also a group of consumers who say they needed to contact their energy supplier but took the view that they would be unable to help. Although these findings highlight a pattern of experience by consumers during the pandemic, they are caveated by being based on a relatively small sample size, with caution required before extrapolating to all consumers.
- For many consumers struggling to pay their energy bills, their energy supplier will be their first port of call. Consideration should be given to developing a protocol to be used by all energy suppliers to help support customers who are struggling because of the pandemic. This protocol should reflect a consistent approach to supporting consumers, with inputs from advice agencies, The Utility Regulator, consumer advocacy bodies, and other key stakeholders.

Appendix 1 (Questionnaire)



QUESTIONNAIRE

Energy Strategy Consumer Research

CFT 3280184

12 March 2021

FINAL SMR



3 Wellington Park
Belfast
BT9 6DJ

T: 02890 923362
F: 02890 923334

info@socialmarketresearch.co.uk
www.socialmarketresearch.co.uk



INTERVIEWER READ OUT:

Hello and good morning / afternoon. My name is XXXX from Social Market Research and we are conducting a survey to find out what people in Northern Ireland think about various energy and climate change issues. We are conducting this survey on behalf of the Utility Regulator. The Utility Regulator is an independent government department responsible for regulating the electricity, gas, water and sewerage industries in Northern Ireland and for protecting consumers with regard to price and quality of service.

Your responses will be confidential and your rights are protected under GDPR. You don't have to answer any question you don't want to, and you can end the interview at any time. Please be as honest as possible in your response. Remember that there are no right or wrong answers. If you have questions about this survey, I will provide you with a telephone number for you to call to get more information.

- X1. This call may be recorded for training and quality purposes are you happy with this? (Single Code)

| | |
|-----|---|
| Yes | 1 |
| No | 2 |

- X2. Are you happy to consent to take part in the survey? (Single Code)

| | |
|---|---|
| Yes, continue | 1 |
| Yes, but not at this time and arrange a call back | 2 |
| No – terminate interview (thank and close) | 3 |
| Other (please specify) | 4 |

- X3. Are you responsible for paying energy bills in your household? **(Single Code)**

| | |
|--|---|
| Yes, continue | 1 |
| No – terminate interview (thank and close) | 2 |

- X4. INTERVIEWER: Insert your interviewer ID number

- X5. INTERVIEWER: Insert Sample Number

Section A: Knowledge and Awareness

INTERVIEWER READ OUT: First, I am going to ask you some questions about your views and understanding on climate change, carbon emissions and energy use. Climate Change is happening as a result of greenhouse gas emissions related to human behaviour.

- A1. How concerned if at all, are you about current climate change, sometimes referred to as 'global warming'? **(Single Code)**

| | |
|---------------------------------|---|
| Very concerned | 1 |
| Fairly concerned | 2 |
| Not very concerned | 3 |
| Not at all concerned | 4 |
| Don't know | 5 |
| Don't believe in climate change | 6 |

- A2. How easy or difficult do you find it to understand the language used around climate change, sometimes referred to as or 'global warming'? **(Single Code)**

| | |
|----------------|---|
| Very easy | 1 |
| Easy | 2 |
| Difficult | 3 |
| Very difficult | 4 |
| Don't know | 5 |

- A3. In Northern Ireland what do you think are the main sources of greenhouse gases that contribute to climate change? **DO NOT PROMPT: CODE ALL MENTIONED**

| | |
|---|---|
| Agriculture / farming | 1 |
| Transport (e.g. air travel, cars etc.) | 2 |
| Energy supply (e.g. the generation of energy) | 3 |
| Use of energy in our homes | 4 |
| Use of energy by business | 5 |
| Other (please specify) | 6 |
| Don't know | 7 |

- A4. Thinking about your everyday life, do you consciously do any of the following to help reduce carbon emissions or limit climate change? **(Code all that Apply)**

| | |
|--|---|
| Walk, cycle or use public transport more instead of using a car | 1 |
| Drive an electric or hybrid car | 2 |
| Think about the energy efficiency of products and appliances you buy | 3 |
| Minimise the amount of energy you use at home (e.g. washing at lower temperatures, switching off lights) | 4 |
| None of the above | 5 |
| Don't know | 6 |

- A5. How important is it for you personally to take action to help limit the effects of climate change? **(Single Code)**

| | |
|----------------------|---|
| Very important | 1 |
| Important | 2 |
| Not very important | 3 |
| Not at all important | 4 |
| Don't know | 5 |

Section B: Low Carbon Technologies (Heat)

Low carbon technology is the term given to renewable sources of energy and technologies which have significantly lower carbon emissions associated with them.

- B1. How much, if anything, would you say you know about each of the following low carbon technologies?
(Single Code for Each Item)

| | |
|--|---|
| Know a lot about it | 1 |
| Know a little about it | 2 |
| Aware of it but don't really know what it is | 3 |
| Never heard of it | 4 |

| | |
|---|---|
| 1 | Biomass boilers |
| 2 | Heat pumps |
| 3 | Thermal solar panels to heat your home |
| 4 | Condenser boiler (high efficiency gas boiler) |
| 5 | High heat retention storage heaters |

- B2. I have just read out a list of examples of low carbon technologies such as biomass boilers, heat pumps and solar panels. How likely is it that you will purchase or install any form of low carbon technology in your home in the future?

| | |
|--|---|
| Already purchased or installed one of these technologies | 1 |
| Very likely | 2 |
| Likely | 3 |
| Unlikely | 4 |
| Very unlikely | 5 |

ASK IF B2 EQ 1

- B3. What was the single most important reason for installing Low Carbon Technology in your home? **DO NOT PROMPT - SINGLE CODE**

| | |
|---|----|
| Better reliability | 1 |
| Convenience | 2 |
| Cost to install has come down and was more affordable to install | 3 |
| Health reasons | 4 |
| I received a financial incentive or grant | 5 |
| Lower energy bills | 6 |
| Market was clear and easy to understand / better choice | 7 |
| My landlord/ social housing provider installed or suggested installing | 8 |
| Previous system old and at end of life / broke down | 9 |
| Recommendation from family / friend | 10 |
| Recommended by an independent body/advice body etc. | 11 |
| Renovating my house | 12 |
| Want to help limit the effects of climate change / reduce carbon emissions/environmental concerns | 13 |
| Warmer home / stop heat loss | 14 |
| No particular reason | 15 |
| Other reason (please specify) | 16 |
| Don't know | 17 |

ASK ITEM IF B2 EQ 2 OR 3

- B4. What would be the single most important reason for installing low carbon technology in your home in the next few years? **DO NOT PROMPT – SINGLE CODE**

| | |
|---|----|
| Availability of a financial incentive or grant | 1 |
| Better reliability | 2 |
| Convenience | 3 |
| Costs to install are coming down and now more affordable to install | 4 |
| Health reasons | 5 |
| If my current system is old and at end of life / broke down | 6 |
| Lower energy bills | 7 |
| Market is clearer now and easier to understand / better choice now | 8 |
| My landlord/ social housing provider installs or suggests installing | 9 |
| Recommendation from family / friend | 10 |
| Recommended by an independent body/advice body etc. | 11 |
| Renovating my house | 12 |
| Want to help limit the effects of climate change / reduce carbon emissions/environmental concerns | 13 |
| Warmer home / stop heat loss | 14 |
| No particular reason | 15 |
| Other reason (please specify) | 16 |
| Don't know | 17 |

ASK IF B2 EQ 4 or 5

- B5. What is the main reason for you being unlikely to install low carbon technology in your home in the next few years? **DO NOT PROMPT - SINGLE CODE**

| | |
|--|----|
| Don't know enough about renewable/low carbon heat measures and how they work | 1 |
| Don't know enough about the benefits of these technologies | 2 |
| Don't trust this technology / uncertain about it | 3 |
| Family / friends have had problems | 4 |
| I don't make these decisions in my home | 5 |
| I don't own the property so wouldn't be able to install this | 6 |
| I don't want the hassle of installing something new | 7 |
| Installation cost / can't afford it / expensive to install | 8 |
| It would be a big job to install this in my home - too much disruption | 9 |
| No grants or financial incentives available | 10 |
| No interest in limiting the effects of climate change or reducing carbon emissions | 11 |
| Reliability concerns | 12 |
| Running costs concerns | 13 |
| There is a physical reason this cannot be installed in my property | 14 |
| Too much choice / market too difficult to understand / navigate | 15 |
| Other (please specify) | 16 |
| Don't know | 17 |

- B6. To what extent would a financial incentive impact your decision to purchase or install low carbon technology? **(Single Code)**

| | |
|-----------------------------|---|
| Much more likely to install | 1 |
| More likely to install | 2 |
| Less Likely to install | 3 |
| Much less likely to install | 4 |
| Don't Know | 5 |
| No impact on my decisions | 6 |

SECTION C: Energy Efficiency Measures in Your Home

I am going to ask you some questions about energy efficiency measures and your home. I am specifically talking about changes made to the building such as installing insulation or putting in high efficiency boilers.

- C1. How much, if anything, would you say you know about each of the following energy efficiency measures?

(Single Code for Each Item)

| | |
|--|---|
| Know a lot about it | 1 |
| Know a little about it | 2 |
| Aware of it but don't really know what it is | 3 |
| Never heard of it | 4 |

| | |
|---|--|
| 1 | Loft insulation |
| 2 | Cavity wall insulation |
| 3 | Solid wall insulation |
| 4 | Oil to gas central heating conversion |
| 5 | High energy efficiency oil boilers (where gas isn't available) |

- C2. How likely are you to purchase or install energy efficiency measures such as insulation or high efficiency boilers in your home in the future? **(Single Code)**

| | |
|--|---|
| Already purchased or installed one of these measures | 1 |
| Very likely | 2 |
| Likely | 3 |
| Unlikely | 4 |
| Very unlikely | 5 |

ASK IF C2 EQ 1

C3. What was the single most important reason for installing energy efficiency measures in your home? **DO NOT PROMPT: SINGLE CODE**

| | |
|---|----|
| Better reliability | 1 |
| Convenience | 2 |
| Cost to install has come down and was more affordable to install | 3 |
| Health reasons | 4 |
| Lower energy bills | 5 |
| Market was clear and easy to understand / better choice | 6 |
| My landlord / social housing provider installed it or suggested installing it | 7 |
| Previous system old and at end of life / broke down | 8 |
| Recommendation from family / friend | 9 |
| Recommended by an independent body/advice body etc. | 10 |
| Renovating my house | 11 |
| Stop heat loss / warmer home | 12 |
| Want to help limit the effects of climate change / reduce carbon emissions / environmental concerns | 13 |
| Was already in the house when I bought it/moved in | 14 |
| We got a financial incentive or grant to install it | 15 |
| No particular reason | 16 |
| Other reason (please specify) | 17 |
| Don't know | 18 |

ASK IF C2 EQ 2 OR 3

- C4. What would be the single most important reason for installing energy efficiency measures (such as insulation or a high efficiency boiler) in your home in the next few years? **DO NOT PROMPT: SINGLE CODE**

| | |
|---|----|
| Better reliability | 1 |
| Convenience | 2 |
| Cost to install has come down and was more affordable to install | 3 |
| Previous system old and at end of life / keeps breaking down / needs replaced | 4 |
| Health reasons | 5 |
| If my landlord / social housing provider installed or suggested installing | 6 |
| Lower energy bills | 7 |
| Market is clearer and easier to understand / better choice | 8 |
| Recommendation from family / friends | 9 |
| Recommended by an independent body/advice agency | 10 |
| Renovating my house | 11 |
| Stop heat loss / warmer home | 12 |
| Want to help limit the effects of climate change / reduce carbon emissions / environmental concerns | 13 |
| We got a financial incentive or grant to install it | 14 |
| No particular reason | 15 |
| Other reason (please specify) | 16 |
| Don't know | 17 |

ASK IF C2 EQ 4 OR 5

- C5. What is the main reason for you being unlikely to install energy efficiency measures in your home in the next few years? **DO NOT PROMPT: SINGLE CODE**

| | |
|--|----|
| Already installed / installed by previous owner | 1 |
| Don't know enough about the benefits of these measures | 2 |
| Don't know enough about these energy efficiency measures and how they work | 3 |
| Don't trust these measures / uncertain about it | 4 |
| Family / friends have had problems | 5 |
| I don't make these decisions in my home | 6 |
| I don't own the property so wouldn't be able to install this | 7 |
| I don't want the hassle of installing something new | 8 |
| Installation cost / can't afford it / expensive to install | 9 |
| It would be a big job to install this in my home - too much disruption | 10 |
| No grants or financial incentives available | 11 |
| No interest in limiting the effects of climate change or reducing carbon emissions | 12 |
| Reliability concerns | 13 |
| Running costs concerns | 14 |
| There is a physical reason this cannot be installed in my property | 15 |
| Other (please specify) | 16 |
| Don't know | 17 |

- C6. To what extent would a financial incentive impact your decision to install energy efficiency measures such as insulation or high efficiency boilers? **(Single Code)**

| | |
|-----------------------------|---|
| Much more likely to install | 1 |
| More likely to install | 2 |
| Less Likely to install | 3 |
| Much less likely to install | 4 |
| Don't Know | 5 |
| No impact on my decisions | 6 |

Section D: Electric Vehicles and Hybrids

Thank you for your patience we are more than halfway through the survey.

- D1. I now want to ask you about electric vehicles and hybrids. How likely is it that you would purchase an electric vehicle or hybrid over the next few years? **(Single Code)**

[INTERVIEWER NOTE IF ASKED WHAT A HYBRID IS: *Hybrid vehicles use both an electric motor and a traditional engine and can include vehicles that require charging and those that do not***].**

| | |
|---|---|
| Already purchased an electric vehicle or hybrid | 1 |
| Very likely | 2 |
| Likely | 3 |
| Unlikely | 4 |
| Very unlikely | 5 |

ASK IF D1 EQ 1

- D2. What was the single most important reason for buying an electric vehicle or hybrid? **DO NOT PROMPT - SINGLE CODE**

| | |
|---|----|
| Better driving experience | 1 |
| Better reliability | 2 |
| Came down in price / more affordable | 3 |
| Convenience | 4 |
| Financial incentive or grant | 5 |
| Lower running costs / saving money | 6 |
| Recommendation from family / friend | 7 |
| Recommended by an independent body/advice body etc. | 8 |
| Vehicle is old and at end of life | 9 |
| Want to help limit the effects of climate change / reduce carbon emissions / environmental concerns | 10 |
| No particular reason | 11 |
| Other reason (please specify) | 12 |
| Don't know | 13 |

ASK IF D1 EQ 2 or 3

- D3. What is the single most important reason why you are likely to buy an electric vehicle or hybrid in the next few years? **DO NOT PROMPT - SINGLE CODE**

| | |
|--|----|
| Better driving experience | 1 |
| Better reliability | 2 |
| Convenience | 3 |
| Financial incentive or grant | 4 |
| If they come down in price / more affordable | 5 |
| Lower running costs / saving money/EV tariff might be cheaper | 6 |
| Recommendation from family / friend | 7 |
| Recommended by an independent body/advice body etc. | 8 |
| Vehicle old and at end of life | 9 |
| Wanting to help limit the effects of climate change / reduce carbon emissions / environmental concerns | 10 |
| No particular reason | 11 |
| Other reason (please specify) | 12 |
| Don't know | 13 |

ASK IF D1 EQ 4 or 5

- D4. What is the single most important reason why you are unlikely to purchase an electric vehicle or hybrid over the next few years? **DO NOT PROMPT - SINGLE CODE**

| | |
|--|----|
| Battery limitations / driving range | 1 |
| Can't drive/don't have a licence | 2 |
| Cost / can't afford it / expensive to buy | 3 |
| Don't know enough about electric vehicles / hybrids | 4 |
| Don't know enough about the benefits of electric vehicles / hybrids | 5 |
| Don't need / use a car | 6 |
| Don't need or want one due to age | 7 |
| Don't trust this technology / uncertain about it | 8 |
| Family / friends have had problems | 9 |
| Lack of charging points | 10 |
| No grants or financial incentives available | 11 |
| No interest in limiting the effects of climate change or reducing carbon emissions | 12 |
| Not planning to change my car in the next few years / won't change until car reaches end of life | 13 |
| Reliability concerns | 14 |
| Other (please specify) | 15 |
| Don't know | 16 |

- D5. To what extent would a financial incentive impact your decision to buy an electric vehicle or hybrid over the next few years? **(Single Code)**

| | |
|---------------------------|---|
| Much more likely to buy | 1 |
| More likely to buy | 2 |
| Less Likely to buy | 3 |
| Much less likely to buy | 4 |
| Don't Know | 5 |
| No impact on my decisions | 6 |

SECTION E: Consumer Protection and Trust

These next questions ask you about where you would go to get information on reducing carbon emissions as well as your general views on who should be responsible for reducing carbon emissions and the cost of reducing carbon emissions.

- E1. If you wanted to get trusted information, advice, or guidance from an organisation on reducing your carbon emissions, who or where would you go to obtain this information?

DO NOT PROMPT - CODE ALL MENTIONED

| | |
|--|----|
| Advice NI | 1 |
| Charities | 2 |
| Citizens Advice | 3 |
| Consumer Council | 4 |
| Consumer groups e.g. Which, Money Saving Expert | 5 |
| Energy efficiency companies/insulation companies | 6 |
| Energy suppliers | 7 |
| Local community groups | 8 |
| Local Councils | 9 |
| N Ireland Executive / NI Government / Assembly | 10 |
| Search engine e.g. Google | 11 |
| Utility Regulator N Ireland | 12 |
| Other (please specify) | 13 |
| Don't know | 14 |

- E2. To support consumers one possible option is a single advice body in Northern Ireland to provide consumers with information, advice and support to reduce their carbon emissions. Would you be supportive or unsupportive of this option? **(Single Code)**

| | |
|-----------------------|---|
| Very supportive | 1 |
| Supportive | 2 |
| Not very supportive | 3 |
| Not at all supportive | 4 |
| Don't know | 5 |

- E3. There are different ways consumers can be supported by government to reduce their carbon emissions. Please say how supportive or unsupportive you would be of each of the following initiatives?

| | |
|-----------------------|---|
| Very supportive | 1 |
| Supportive | 2 |
| Not very supportive | 3 |
| Not at all supportive | 4 |
| Don't know | 5 |

| | |
|---|---|
| 1 | Educational programmes / awareness raising campaigns? |
| 2 | Providing trusted information and advice to enable consumers to make their own decisions? |
| 3 | Organisations working with consumers to support them to change their behaviours? |
| 4 | Financial incentives to encourage consumers to change their behaviour |
| 5 | Mandatory polices such as no oil boilers or no diesel vehicles after a certain date? |

- E4. I am now going to read you out a number of statements and please say to what extent you agree or disagree with each? **(Single code for each item)**

| | |
|----------------------------|---|
| Strongly agree | 1 |
| Agree | 2 |
| Neither agree nor disagree | 3 |
| Disagree | 4 |
| Strongly disagree | 5 |
| Don't know | 6 |

| | |
|---|--|
| 1 | I don't know how to reduce my personal carbon footprint |
| 2 | It's more important to reduce carbon emissions than it is to keep the cost of energy low |
| 3 | I'm happy to pay more for renewable energy |
| 4 | Reducing how much electricity and gas I use won't make any impact on carbon emissions |
| 5 | As an individual there is a lot I can do personally to tackle climate change |

- E5. Who do you think should primarily be responsible for reducing carbon emissions in Northern Ireland?
(Single Code)

| | |
|-------------------------|---|
| Individuals / consumers | 1 |
| Government | 2 |
| Energy companies | 3 |
| Everyone | 4 |
| Other (please specify) | 5 |

- E6. Generating energy from renewable sources such as wind power, solar energy and biomass etc. will need more investment in the energy infrastructure. As an energy consumer, how much would you be willing to see your bill rise to support this? **(Single Code)**

| | |
|------------------------------|---|
| up to 5% | 1 |
| Between 5% and 10% | 2 |
| 10%-15% | 3 |
| Would not be prepared to pay | 4 |
| Don't know | 5 |

ASK IF E6 EQ 4

- E7. Is the reason you would not pay because you are unwilling to pay or because you are unable to pay? **(Single Code)**

| | |
|-----------------------|---|
| I am unwilling to pay | 1 |
| I am unable to pay | 2 |

- E8. Reducing carbon emissions and tackling climate change comes at a cost. Who do you think should **pay** for reducing carbon emissions in Northern Ireland? **(Code all that apply)**

| | |
|-------------------------|---|
| Individuals / consumers | 1 |
| Government | 2 |
| Energy companies | 3 |
| Everyone | 4 |
| Other (please specify) | 5 |

- E9. There are areas about energy and climate change that need decisions from government,

Thinking of the following three issues, please rank them in order of importance. First, which is most important. Which is second in importance and which is third?

[INTERVIEWER NOTE: security of supply means minimising the number of power cuts or disruption to your energy supply].

| | Rank 1 | Rank 2 | Rank 3 |
|-------------------------------------|--------|--------|--------|
| Cost of energy | 1 | 1 | 1 |
| Having a secure supply of energy | 2 | 2 | 2 |
| Achieving net zero carbon emissions | 3 | 3 | 3 |

E10. I'm now going to ask you how concerned you are about various things happening in the next 10-20 years. So how concerned, if at all, are you about... **(Single Code for Each Item)**

| | |
|----------------------|---|
| Very concerned | 1 |
| Fairly concerned | 2 |
| Not very concerned | 3 |
| Not at all concerned | 4 |
| Don't know | 5 |

| | |
|---|--|
| 1 | Steep rises in energy prices |
| 2 | Power cuts becoming more frequent |
| 3 | NI consumers not keeping up with new energy technologies |
| 4 | Government making it mandatory that no oil boilers or diesel vehicles are permitted after a certain date |
| 5 | Sharing your data on energy use |

SECTION F: Energy Consumers During Covid-19

I would now like to ask you some questions about your energy usage over the last year since the Covid-19 pandemic started.

F1. What is your main source of energy to heat your home? **(Single Code)**

| | |
|-------------------------|---|
| Electricity | 1 |
| Natural gas (mains gas) | 2 |
| Bottled gas | 3 |
| Oil | 4 |
| Wood | 5 |
| Coal | 6 |
| Other (please specify) | 7 |
| Don't know | 8 |

F2. How do you pay for your electricity? **(Single Code)**

| | |
|---|---|
| Monthly direct debit | 1 |
| Quarterly direct debit | 2 |
| Pay by cheque, cash or card on receipt of your bill | 3 |
| Pre-payment or pay as you go meter | 4 |

ASK IF F1 EQ 2

F3. How do you pay for your mains gas? **(Single Code)**

| | |
|---|---|
| Monthly direct debit | 1 |
| Quarterly direct debit | 2 |
| Pay by cheque, cash or card on receipt of your bill | 3 |
| Pre-payment or pay as you go meter | 4 |

F4. We would like to understand more about how the Covid 19 pandemic has affected your energy usage. Which of the following statements best describes your situation? **(Single Code)**

| | |
|---|---|
| I am using a lot more energy than I usually do for the time of year | 1 |
| I am using a little more energy than I usually do for the time of year | 2 |
| I am using the same amount of energy as I usually do for the time of year | 3 |
| I am using a little less energy than I usually do for the time of year | 4 |
| I am using a lot less energy than I usually do for the time of year | 5 |

ASK IF F2 LE 3

- F5. We would like to understand more about how the Covid 19 pandemic has affected your electricity costs. Which of the following statements best describes your situation? **(Single Code)**

| | |
|---|---|
| I have not struggled to pay my electricity bills | 1 |
| I sometimes struggled to pay my electricity bills but I usually manage to keep on top of it | 2 |
| I struggle to pay my electricity bills and I have fallen behind in my payments | 3 |
| I always struggle to pay my electricity bills and I am nearly always behind in my payments | 4 |
| I would rather not say | 5 |

ASK IF F3 LE 3

- F6. We would like to understand more about how the Covid 19 pandemic has affected your gas costs. Which of the following statements best describes your situation? **(Single Code)**

| | |
|---|---|
| I have not struggled to pay my gas bills | 1 |
| I sometimes struggled to pay my gas bills but I usually manage to keep on top of it | 2 |
| I struggle to pay my gas bills and I have fallen behind in my payments | 3 |
| I always struggle to pay my gas bills and I am nearly always behind in my payments | 4 |
| I would rather not say | 5 |

ASK IF F2 EQ 4

- F7. We would like to understand more about how the Covid 19 pandemic has affected your electricity costs. Which of the following statements best describes your situation? **(Single Code)**

| | |
|--|---|
| I have not struggled to top up my electricity meter | 1 |
| I sometimes struggled to top up my electricity meter but I usually manage to keep on top of it | 2 |
| I struggle to top up my electricity meter | 3 |
| I always struggle to top up my electricity meter | 4 |
| I would rather not say | 5 |

ASK IF F3 EQ 4

- F8. We would like to understand more about how the Covid 19 pandemic has affected your gas costs. Which of the following statements best describes your situation? **(Single Code)**

| | |
|--|---|
| I have not struggled to top up my gas meter | 1 |
| I sometimes struggled to top up my gas meter but I usually manage to keep on top of it | 2 |
| I struggle to top up my gas meter | 3 |
| I always struggle to top up my gas meter | 4 |
| I would rather not say | 5 |

- F9. Thinking about the last 12 months during the Covid 19 pandemic, have you ever gone without electricity that you really needed in your home? **(Single Code)**

| | |
|--------------------------------|---|
| Yes, on one occasion | 1 |
| Yes, on more than one occasion | 2 |
| No | 3 |

ASK IF F9 LE 2

- F10. Why have you gone without electricity? **(CODE ALL THAT APPLY)**

| | |
|--|---|
| I could not afford to top up | 1 |
| I could not leave the house to top up | 2 |
| The place where I top up was closed due to coronavirus | 3 |
| Other (please specify) | 4 |

ASK IF F1 EQ 2

- F11. Thinking about the last 12 months during the Covid 19 pandemic, have you ever gone without gas that you really needed in your home? **(Single Code)**

| | |
|--------------------------------|---|
| Yes, on one occasion | 1 |
| Yes, on more than one occasion | 2 |
| No | 3 |

ASK IF F11 LE 2

- F12. Why have you gone without gas? **(CODE ALL THAT APPLY)**

| | |
|--|---|
| I could not afford to top up | 1 |
| I could not leave the house to top up | 2 |
| The place where I top up was closed due to coronavirus | 3 |
| Other (please specify) | 4 |

- F13. The Covid-19 pandemic has impacted on consumers in different ways. Because of the pandemic did you contact your energy supplier for help or support? **(Single Code)**

| | |
|-----|---|
| Yes | 1 |
| No | 2 |

ASK IF F13 EQ 1

- F14. Why did you have to contact your energy supplier? **(Code all that apply)**

| | |
|----------------------------------|---|
| Debt issue | 1 |
| Payment issue | 2 |
| Unable top up a Prepayment Meter | 3 |
| Other (please specify) | 4 |

ASK IF F13 EQ 1

F15. Briefly, what help or assistance was offered by your supplier? **DO NOT PROMPT: CODE ALL MENTIONED**

| | |
|--|---|
| Debt referral/referral to an external advice agency for debt support | 1 |
| Debt advice | 2 |
| Reduce debt payment amount | 3 |
| A debt repayment plan was set up | 4 |
| Physical assistance with Prepayment Meter top up | 5 |
| Financial support for Prepayment Meter top up | 6 |
| Offered to sign up to customer care register | 7 |
| Other (please specify) | 8 |

ASK IF F13 EQ 1

F16. Thinking back to when you contacted your energy supplier, please say if agree or disagree with each of the following statements?

| | |
|-----------------------------|---|
| Strongly agree | 1 |
| Agree | 2 |
| Neither agree nor disagree | 3 |
| Disagree | 4 |
| Strongly disagree | 5 |
| Don't know / can't remember | 6 |

| | |
|---|---|
| 1 | I felt that my energy supplier listened to me and understood my issue |
| 2 | My energy supplier was supportive |

ASK IF F13 EQ 1

F17. How satisfied or dissatisfied were you with the outcome of your contact with your energy supplier? **(Single Code)**

| | |
|------------------------------------|---|
| Very satisfied | 1 |
| Satisfied | 2 |
| Neither satisfied nor dissatisfied | 3 |
| Dissatisfied | 4 |
| Very dissatisfied | 5 |
| Don't know | 6 |

ASK IF F17 EQ 4 OR 5

F18. Why were you dissatisfied?

| |
|--|
| |
|--|

ASK IF F13 EQ 2

F19. Why did you not contact your energy supplier for help or support during the pandemic.
(Single Code)

| | |
|---|---|
| I didn't need to / didn't need help or support | 1 |
| I needed to contact them but couldn't find the contact details | 2 |
| I needed to contact them but couldn't contact them (e.g. phone not answered, no one responded etc.) | 3 |
| I needed to contact them but didn't think my energy supplier could help | 4 |
| Other reason (please specify) | 5 |

Section G: About You

This is the final section in the survey.

G1. Are you...? (Single Code)

| | | |
|------|--------|-------------------|
| Male | Female | Prefer not to say |
| 1 | 2 | 3 |

G2. What age are you? INTERVIEWER RECORD AGE:

G3. What is your occupation?

G4. INTERVIEWER RECORD SEG OF RESPONDENT: (Single Code)

| | |
|------|---|
| ABC1 | 1 |
| C2DE | 2 |

G5. What is your current employment status? **(Single Code)**

| | |
|---|----|
| Self-employed | 1 |
| Working full-time | 2 |
| Working full-time (but currently on furlough) | 3 |
| Working part-time | 4 |
| Working part-time (but currently on furlough) | 5 |
| Seeking work for the first time | 6 |
| Unemployed, i.e. not working but actively seeking work | 7 |
| Not actively seeking work but would like to work | 8 |
| Not working and not seeking work | 9 |
| Looking after home and family | 10 |
| Unable to work due to permanent illness or disability | 11 |
| Student (full time) | 12 |
| Student (part time) | 13 |
| On a government or other training scheme / apprenticeship | 14 |
| Retired | 15 |
| Other (please specify) | 16 |

G6. What is your highest educational qualification? **(Single Code)**

| | |
|---|---|
| Degree Level or higher | 1 |
| BTEC (Higher), BEC (Higher), TEC (Higher), HNC, HND | 2 |
| GCE A 'Level (including NVQ Level 3) | 3 |
| BTEC (National), BEC (National), TEC (National), ONC, OND | 4 |
| GCSE (including NVQ Level 2), GCE O' Level (including CSE Grade 1), Senior Certificate, BTEC (General), BEC (General) | 5 |
| CSE (Other than Grade 1) | 6 |
| Other (Please specify) | 7 |
| No formal qualification | 8 |
| Refused | 9 |

G7. Are your day-to-day activities limited because of a health problem or disability which has lasted or is expected to last, at least 12 months? Include problems which are due to ageing. **(Single Code)**

| | |
|-----------------------|---|
| Yes, limited a lot | 1 |
| Yes, limited a little | 2 |
| No | 3 |
| Prefer not to say | 9 |

G8. INTERVIEWER RECORD LOCAL GOVERNMENT DISTRICT: **(Single Code)**

| | |
|---|----|
| Antrim and Newtownabbey Borough Council | 1 |
| Ards and North Down | 2 |
| Armagh City, Banbridge and Craigavon | 3 |
| Belfast | 4 |
| Causeway Coast and Glens | 5 |
| Derry and Strabane | 6 |
| Fermanagh and Omagh | 7 |
| Lisburn and Castlereagh | 8 |
| Mid and East Antrim | 9 |
| Mid Ulster | 10 |
| Newry, Mourne and Down | 11 |

G9. Is your home...? **(Single Code)**

| | |
|---|---|
| Owned outright or owned with a mortgage | 1 |
| Northern Ireland Housing Executive | 2 |
| Housing Association | 3 |
| Private rented | 4 |
| Other (please specify) | 5 |

G10. Could you please indicate the number that best describes your total **personal income** per year (whether from employment, pensions, state benefits, investments, or any other sources) before the deduction of tax. **(Single code)**

[IF NECESSARY REASSURE RESPONDENT THAT ALL INFORMATION IS COMPLETELY CONFIDENTIAL AND THIS IS THE BEST INDICATOR OF WHETHER WE HAVE INTERVIEWED A REPRESENTATIVE RANGE OF PEOPLE].

| | |
|----------------------------------|----|
| Less than £10,000 | 1 |
| £10,001 – £20,000 | 2 |
| £20,001 – £30,000 | 3 |
| £30,001 – £40,000 | 4 |
| £40,001 – £50,000 | 5 |
| £50,001 - £60,000 | 6 |
| £60,001 - £70,000 | 7 |
| £70,001 - £80,000 | 8 |
| £80,001- £90,000 | 9 |
| £90,001 - £99,999 | 10 |
| £100,000+ | 11 |
| Prefer not to answer/ Don't know | 12 |

G11. Finally, is your household in receipt of universal credit? **(Single Code)**

| | |
|-------------------|---|
| Yes | 1 |
| No | 2 |
| Don't know | 3 |
| Prefer not to say | 4 |

THANK AND CLOSE