CEPA

Impact Utilities

Northern Ireland Domestic Consumer Insight Tracker 2018/19: Findings

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A report on behalf of:

The Utility Regulator (Northern Ireland)

Utility Regulator
ELECTRICITY GAS WATER

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1. INTRODUCTION

CEPA and Impact were commissioned by the Utility Regulator (UR) to conduct a survey of domestic energy customers in Northern Ireland (NI) to better understand aspects of the consumer perspective. This work will help the Utility Regulator to monitor domestic consumer outcomes and behaviour in the Northern Irish domestic energy market over time. Survey outcomes will help the UR to protect the interests of energy consumers in NI under its Consumer Protection Programme (a three-year suite of projects aimed at enhancing consumer protections in the energy retail market) and contribute towards its strategic objectives set out in its 2019-24 Corporate Strategy.[1]

The aim of this study is to conduct a 'baseline survey', which can be repeated over time in order to track experience, attitudes and engagement of consumers as retail and consumer issues and markets change, and as retail market regulation develops over time. The UR expects to conduct the first follow-up domestic survey in the coming years.[2]

This report aims to present the key findings from the 2018/19 survey and highlights key differences in responses between different groups of people.

The remainder of this report is organised as follows:

- **Section 2** presents the methodological approach followed to complete this study.
- **Section 3** examines the level of consumer engagement in NI.
- **Section 4** examines fuel usage, spend and affordability for domestic consumers in NI.
- **Section 5** examines consumers' levels of knowledge and perceptions in NI.
- **Section 6** examines consumer uptake and preferences in relation to broader energy market services in NI.
- **Appendix A** sets out the survey in full.
- **Appendix B** provides more detailed data tables of findings.

At the end of each of Sections 3-6 we identify some key themes of relevance to the UR and outline some possible policy implications as well as areas of research that the UR may wish to explore further.

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[1] See: https://www.uregni.gov.uk/consumer-protection-0

[2] We understand that the UR also intends to conduct a non-domestic consumer survey in financial year 2019/20.

2. METHODOLOGY

The Consumer Insight Tracker[3] was designed and developed by Impact and CEPA on behalf of the UR. Design of key materials, such as the questionnaire and analysis specifications, were approved by UR to ensure the deliverables meet the needs of the research.

The research conducted represents a 'baseline survey', which will be repeated periodically over time to measure changes in consumer perceptions. It was undertaken between September 2018 and February 2019, with key dates for each stage outlined in the relevant sections of this chapter.

The following subsections outline the methodological approach we have taken to complete this study, including details of the consumer survey and the analytical approach used to identify findings of most relevance.

2.1. Approach

We carried out a consumer survey to provide a robust evidence base of consumers from which to measure perceptions, and to enable comparable surveys to be conducted in future. The quantitative nature of our research allows statistically significant comparisons to be made between subgroups such as age, gender, income, fuel usage, etc. It allows for differences between certain groups of the consumer population identified, and for changes in consumer behaviours and perceptions to be tracked over time.

Qualitative research, whilst useful to understand detailed insights, does not provide numerical data against which statistically robust conclusions can be drawn, and therefore in this case was not employed.

Two different survey methodologies were combined for this survey (i.e. 'a mixed method approach'). The NI market is relatively small, and therefore one method alone would not have achieved a sufficiently large sample size. The web-based survey allowed increased accessibility as respondents were able to complete the survey in their own time from their own homes, at work or from a mobile device. Interview numbers were supplemented with telephone surveys to reach a total of 1,503 interviews. This allows for survey findings which are accurate to between 1% and 3% at the 95% confidence level.

The main survey fieldwork was conducted between 21st November 2018 and the 17th December 2018. Before the main survey was launched, a pilot phase allowed the questionnaire wording and content to be evaluated and amended by consumers. This provided confidence that there was a clear understanding of the questions and therefore reliable, robust data could be established based on this research.

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[3] We refer to the survey that was used for research as the Consumer Insight Tracker.

2.2. SURVEY

The survey was designed to take no more than 20 minutes in order to keep respondents fully engaged throughout, maximise response rate and reduce the risk of drop-outs or respondent fatigue.

The questionnaire was designed in a multi-stage approach. At each stage, the UR was consulted and kept informed. The UR was also invited to provide feedback to ensure the draft questionnaire met its objectives and would provide insightful information from which to draw policy implications. We adopted the following high-level process to develop the questionnaire:

- With the UR, we co-developed a set of consumer issues to be researched and assigned priorities to each. These issues were split into Level 1 (high-level topic areas to be explored) and Level 2 (detailed questions).
- This list was supplemented with additional issues to be included, based on surveys conducted in the past and comparable surveys, such as those conducted by other regulators.
- The issues were turned into draft questions, and reviewed for clarity, duplication and overall survey length.
- A full draft questionnaire was created including respondent and interviewer instructions, filtering and screening criteria, GDPR and Market Research Society reassurances and data processing opt-in questions.
- Once informally checked for survey length (by conducting a number of test interviews), and excluding any non-essential questions, the version was ready for pilot testing.

The list of Level 1 and 2 issues initially provided by the UR in the research brief are shown below:

Table 2.1: Level 1 and 2 issues in the research brief

Level 1 issues	Level 2 issues
Respondent "characteristic" survey questions	Affordability
Billing and payment method	Consumer outcomes and behaviours
Understanding of the NI energy market	Trust and confidence
Switching supplier	Engagement with competitive markets
Contact/complaint handling by supplier	Satisfaction
Vulnerability	How utilities are treating vulnerable consumers
Pre-payment	
Interest in wider energy initiatives	
Consumer concerns	

Source: CEPA and Impact

The following issues were out of scope of this analysis and are not discussed within this report:

- Smart metering

- Consumer knowledge of the UR and its role
- Tariff switching
- Prosumers (self-generation)

2.2.1. Cognitive testing

To ensure that the survey was comprehensive, understandable and within the expected average duration, a series of cognitive interviews were conducted in advance of the main fieldwork. Cognitive interviewing is a particular kind of survey piloting with a focus on survey administration and comprehension, rather than on the answers to the survey questions themselves. This process tweaks the draft questionnaire, if necessary, to optimise it before survey launch.

Ten members of the general public were asked to complete the survey. They were encouraged to note any points of confusion, anything that was difficult to answer or any errors they identified.

Following the completion of the survey by the sample of the public, an in-depth interview of up to 45 minutes was undertaken with a member of the project team to identify, understand and collaboratively work through any points of confusion or hesitation when completing the survey. This interview was used to: (1) identify any areas of the survey which needed to be clarified; (2) refine key questions; (3) uncover leading questions; and (4) measure survey completion time.

Feedback from these interviews was collated to inform changes to the questionnaire. These changes included the addition of the 'don't know' answer codes for some questions, clarification around the difference between energy source and supplier, the addition of time frames, changes to the order of questions and who saw each question. Some instructions were amended for the version to be administered over the phone, as these questions were less clear when read out verbally rather than appearing on screen. Care was taken not to change the question in a way which may have materially affected the responses given. The average interview length during cognitive testing was 25 minutes. As a result, some non-core questions were removed to bring the interview length down to or below the target of 20 minutes.

2.2.2. Online surveys

503 interviews were conducted online with individuals who belong to an online community panel. The web-based survey allowed increased accessibility as respondents were able to complete the survey in their own time from their own homes, at work or from a mobile device. Invitations to the survey were sent according to quotas, as outlined in Section 2.2.4, to ensure a sample reflective of the NI population. As is standard practice, survey respondents received a small incentive from the online survey company in the form of reward points[4] as a thank you for their time.

[4] The collection of these points allows those who participate in multiple surveys to benefit from incentives such as online shopping vouchers, etc.

2.2.3. Telephone surveys

Due to the fact that online interviews are not universally accessible to the whole population and require the respondent to have registered with an online panel, telephone interviews were used to conduct a further 900 interviews, also in line with quotas representative of NI.

Telephone interviews allowed responses from across the whole of NI with no geographical limitation. Face-to-face interviews were not used. Face-to-face surveying needs to be conducted close to urban centres[5] and the practicalities of such surveying would have therefore risked introducing a bias towards urban consumers. Telephone surveying was considered suitable because the questions contained in the survey could easily be administered by phone.

In addition to the 900 telephone interviews, 100 interviews (a 'boost') were conducted with consumers classified as vulnerable. Vulnerable consumers were selected on a self-identification basis and are defined in Section 2.6. These customers are often underrepresented in surveys but have an important voice with distinct needs and views that are important for the UR to consider. This boost sample was purchased from a mixture of GDPR-compliant Random Digit Dialling (RDD) and lifestyle samples to target nationally-representative consumers, as well as specifically targeting those in the 'over 65' category.

2.2.4. Quotas

Respondents had to be either the sole, or joint, energy bill decision maker to ensure that they had sufficient knowledge to answer questions relating to their bills and the service that they receive. In addition, respondents had to be over the age of 18 and live in NI. Quotas on age and gender were set in line with 2011 census data to ensure that a sample representative of the population of NI was interviewed.[6] Income levels were also considered to ensure that a diverse social range of the population participated in the survey.

At the beginning of the questionnaire, a series of screening questions determined the respondent's eligibility to take part in the survey, as well as quota questions such as key demographics.

Table 2.2 shows the quotas used for the survey. The additional 100 vulnerable interviews are not included in the demographic quotas.

Table 2.2 Survey quotas

Survey quotas		%	Target number
Total		100%	1500
Gender	Male	49%	686
	Female	51%	714

[5] As travelling between a number of different rural areas would lead to very high survey costs.

[6] Ideally, the survey quotas would have been based on a representative sample of energy bill payers in NI. Unfortunately, information on this population is not available and therefore quotas on the population as a whole were used as a proxy.

Age	18-24	13%	182
	25-44	36%	504
	45-64	32%	448
	65+	19%	266
Income (soft quota)[7]	Up to £15,499	30%	420
	£15,500 - £39,999	55%	770
	£40,000+	15%	210
Vulnerable customers	Additional boost of 100 vulnerable customers	n/a	100
Location (soft quota)[7]	Urban[8]	50% min	751
	Rural	25% min	375

Source: CEPA and Impact

2.2.5. Survey structure

The average survey length was 16 minutes and covered the following areas:

- Screening questions and demographics
- Energy usage and expenditure
- Value perceptions and affordability
- Understanding of the energy market
- Vulnerability
- Switching behaviour
- Satisfaction with service, including complaints procedures
- Energy efficiency
- Broader market engagement
- Additional services

The questionnaire comprised mostly closed questions; a mixture of scale, categorical, yes/no and rating questions and one open-ended question. The full questionnaire is available in Appendix A.

2.2.6. Maximising response

Response to the survey was maximised in the following ways:

[7] We applied a soft quota for 'Income' and 'Location'. This meant that we did not fix the intended number of respondents in these areas but monitored actual numbers against the target.

[8] This included individuals who classed themselves as 'sub-urban'.

- Underlining the importance of the survey by highlighting UR as the survey sponsor and by explaining the purpose and use of the survey data being collected.
- Having a fieldwork period of 4 weeks to allow time for 'call backs', appointments and targeted online invitations and reminders.
- Contacting telephone respondents predominantly between 2pm and 8pm, in order to reach those not at home during the day and to allow for appointments/call backs at a time that suits the respondent.
- Online respondents were able to complete the survey in two or more parts if they ran out of time part way through.

Section 2.2.7 compares the achieved sample to the quotas set.

2.2.7. Achieved numbers

In total, 1503 interviews were achieved including the boost of 100 vulnerable customers. Due to the requirement that respondents be bill payers, recruiting a representative number of 18-24 year olds within Northern Ireland was not possible. There are no public records of demographics of bill payers. Thus, it was not possible to match quotas to the responsible bill payer. However, assuming that consumers in this age group are less likely to be bill payers, we may assume that a lower number than the national quota are bill payers.

The shortfall of interviews for 18-24 year olds was filled by increasing numbers of respondents across the other age categories. Achieved figures shown include the age, gender and income profile of those in the vulnerable boost sample.

Table 2.3: Achieved number of interviews

Achieved number of interviews		Target		Achieved[9]	
		%	Number	%	Number
Total		100%	1500	100%	1503
Gender	Male	49%	686	50%	747
	Female	51%	714	50%	750
Age	18-24	13%	182	6%	86
	25-44	36%	504	31%	470
	45-64	32%	448	36%	547
	65+	19%	266	27%	400
Income (soft quota[10])	Up to £15,499	30%	420	23%	348
	£15,500 - £39,999	55%	770	41%	610

[9] Note that some respondents preferred not to answer some questions.

[10] Note that a number of individuals preferred not to state their income level. The total number of achieved numbers is therefore less than 100%.

	£40,000+	15%	210	21%	317
Vulnerability (included within the total interviews achieved)		n/a	100	n/a	100
Location (soft quota11)	Urban	50% (min)	751 (min)	59%	862
	Rural	25% (min)	375 (min)	39%	571

Source: CEPA and Impact

Despite some challenges with filling some quota groups, each group had a base size of more than 50 (the minimum base size suggested for analysis purposes), and we gathered at least 300 responses in all age groups apart from those aged 18-24.

2.3. Weighting

Weighting is used in market research to ensure that the profile of the survey closely resembles the profile of the population it aims to represent. Typically, this would involve similar proportions of key demographics (gender, age) and geographical spread. It is only used when the natural profile of the sample diverges significantly from the population. This often results from certain groups that are hard to recruit or from the researchers intentionally increasing the sampling quota from certain groups to ensure sufficient data to support a separate analysis of these groups (for example as part of the 'vulnerable boost').

Weighting is used to ensure that the results of the survey are representative of the population – it does not change the number of interviews in any way. So, while it is appropriate to report results based on weighting, the reported sample sizes (which indicate the statistical robustness of the data) are taken as the actual number of survey responses.

Due to the discrepancy between the target quotas and the final interview numbers, the data in this report has been weighted to ensure that the sample profile for gender and age is representative of NI according to 2011 census data.

The weighted profiles are shown below:

Table 2.4: Weighted survey numbers

Weighted survey numbers		Achieved		Weighted	
		%	Number	%	Number
Total		100%	1503	100%	1503
Gender	Male	50%	747	49%	736
	Female	50%	750	51%	766
Age	18-24	6%	86	13%	195
	25-44	31%	470	36%	541
	45-64	36%	547	32%	481

[11] Note that not all respondents stated their location. The total number of achieved numbers is therefore less than 100%.

	65+	27%	400	19%	286
Income (soft quota)[12]	Up to £15,499	23%	348	27%	357
	£15,500 - £39,999	41%	610	47%	613
	£40,000+	21%	317	25%	328
Location (soft quota)[13]	Urban	59%	862	61%	882
	Rural	39%	571	37%	538

Source: CEPA and Impact

Unweighted bases are shown throughout the report. Percentage figures are based on weighted survey numbers.

[12] Note that a number of individuals preferred not to state their income level.

[13] Note that not all respondents stated their location.

2.4. STATISTICAL SIGNIFICANCE

Determining statistical significance can be a useful tool in understanding which differences are likely to be a “real” variation in scores, compared with those that might be due to sampling error (i.e. an error in the analysis due to the sample not being representative of the NI population).

Statistical significance can be accurately used only when a random probability sampling approach has been taken. This is a survey method where each member of the population has an equal chance of being selected for the survey. It is usually conducted door-to-door making it a very expensive method for all but the most heavily-invested social survey work.

Therefore, a quota sample approach has been used, and a sample drawn from online panel providers (respondents have to pre-register) and a telephone sample (purchased from GDPR-compliant lists) to build a sample representative of the NI demographic profile. This means that not all residents of NI had an equal opportunity to participate. For this reason, statistical differences are presented in this report on an indicative basis only.

Using a random probability sampling approach, variation between the sample results and the "true" values can be estimated. The confidence level that we apply to the analysis in this report is 95% – that is, the chances are 95 in 100 that the results derived from our sample reflect the "true" value. We also tested whether the difference between the results of two separate groups (e.g. consumers in certain age groups) are statistically significant using the same confidence level.

The following indicators are used in this report to identify where differences reported are significant at the 95% confidence level:

Statistical significance indicators	
▼	Denotes finding for sub-group is significantly lower than the average at the 95% confidence level.
▲	Denotes finding for sub-group is significantly higher than the average at the 95% confidence level.

2.5. DATA QUALITY CHECKS

To ensure validity of the results, the data was checked for quality before analysis was carried out. These checks included the following:

- We removed respondents who completed the survey very quickly and therefore may have not given considered results.
- We removed respondents who have repeatedly chosen the same options, for example the top option, indicating that they have clicked through the survey without full consideration of response.
- We removed respondents who have repeatedly given responses which do not make sense or have provided inappropriate open-ended results.

Respondents who are removed from the online panel do not receive any credits for this survey, and if they repeatedly do so, are removed from the panel. Telephone interviews were also validated as part of the quality control procedures and any interviews not meeting the required quality criteria were removed.

Following removal of responses for the reasons listed above, we achieved a total number of 1503 survey completions.

2.6. Analytical approach

The survey produced a significant amount of data that enabled the analysis to be conducted across a wide range of dimensions. In a number of cases, the sample of respondents that we received allowed for differences between the responses of different consumer groups to be identified with statistical significance at the 95% confidence level.

We summarise the key individual and consumer characteristics explored through analysis in the figure below.

Figure 2.1: Individual and consumer characteristics

Individual characteristics	Consumer characteristics
• Age • Qualifications • Household income • Vulnerability • Children in the household	• 'Switchers' • Energy payment method • Meter type • Urban vs. rural location

Source: CEPA and Impact

2.6.1. Definitions of 'switchers' and 'vulnerability' used in this report

In several sections of this report, we consider whether there are any statistically significant differences between the responses of consumers who have switched electricity supplier in the last three years ('switchers') and those who have not ('non-switchers'). The Consumer Council of NI (CCNI) consider consumers to be 'sticky' if they have not switched electricity supplier in the last three years. They consider that these individuals may require more encouragement to switch electricity suppliers.[14]

We also consider whether responses from vulnerable consumers are significantly different from the average consumer throughout the report. We identified three different levels of vulnerability based on guidance from the UR:

- *High vulnerability*: includes consumers with a chronic/serious illness; use of medical dependant equipment in the home; and oxygen use.
- *Medium vulnerability*: includes consumers of pensionable age; physical impairments; mental health issues; visual/hearing impairments; and unable to answer the door.

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

- *Low vulnerability*: includes consumers with young children under the age of five; consumers who are unable to communicate in English; and consumers who are caring for another member of their family.

Based on the guidance of the UR for the purposes of considering policy implications, where we refer to 'vulnerable' consumers in the rest of this report, we include those who fall into the definition of 'medium' or 'high' vulnerability. We consider consumers who fall into the 'low vulnerability' category and those with no stated vulnerabilities separately.

2.6.2. Identifying key findings

While we present more detailed data tables in Appendix B, we highlight some of our key findings, considered most relevant for the UR and other stakeholders, throughout this report. We have applied an informal set of criteria when analysing the survey results to identify the most important and relevant findings:

- **Are findings significantly different from the population average?**
  - For example, are young consumers significantly more likely to have switched supplier than the average consumer?
- **Are findings as expected?**
  - We may have a priori expectations regarding certain issues being explored. For example, we may expect younger consumers to be more likely to be aware of online comparison tools than older consumers.
  - On occasion, we report on whether or not these a priori expectations are reflected in the results of the survey.
- **Do findings have any particular policy implications?**
  - For example, we consider whether certain types of consumers struggle to pay their energy bills more than others.

We have applied these as an informal set of criteria, although not mechanistically, to aid us in the selection of the most relevant findings to present. In addition to these criteria, we also relied on our own judgement and understanding of the UR's objectives to bring out the most relevant, significant and interesting findings.

In areas where we have been unable to identify interesting and/or statistically significant results for different consumer groups, we usually present findings only at a total population level. For completeness, and to allow for stakeholders to carry out their own analysis of results, we present detailed data tables in Appendix B.

It is important to note that all surveys report on what customers say, which may not necessarily reflect what they would actually do or think. For example, consumers may have conscious or unconscious reasons for providing certain responses, even where they do not reflect actual intentions or actions. Alternatively, while care has been taken with survey design, some questions may still cause confusion and consumers may accidentally provide incorrect information. This is important to consider when interpreting the survey results presented.

3. CONSUMER ENGAGEMENT

This chapter examines the level of consumer engagement in NI based on analysis of the following topics included in the survey:

- **Energy supplier switching**: we explore the levels of energy supplier switching;
- **Tariff choice**: we analyse the choice NI consumers make between different electricity tariffs;
- **Broader market engagement**: we examine the extent to which consumers engage in non-energy markets.

Box 1: Consumer engagement – key facts

Energy supplier switching

- A significant number of consumers have never switched electricity supplier (40%).
- Younger consumers are significantly more likely to have switched electricity supplier at least once. 67% of consumers under the age of 44 have switched electricity suppliers, compared with only 53% of consumers over the age of 44.
- 63% of consumers who use gas say they have never switched gas supplier. However, many gas consumers may have only gained access to the gas grid and taken up the fuel relatively recently. In addition, some gas consumers are unable to switch supplier as retail gas competition is not universal in Northern Ireland.
- Doorstep selling remains the most common way to switch (41% of electricity switchers) and is particularly common amongst the elderly (56% of 65+ switchers did so via doorstep selling).
- Cost saving appears to be the most common reason for initiating a switch. The most common reason why individuals have not switched is because they are happy with their existing provider.
- A slight majority of consumers say they are unlikely to switch energy suppliers in the next 12 months (51% of electricity and gas consumers). However, those who have previously switched in the last three years are more likely to do so again than those who have not.
- Increasing awareness of the benefits of switching may be important to encourage more consumers to switch energy suppliers. As we show in Section 5 (in relation to Knowledge of Energy Suppliers), consumers who have switched within the last three years appear to have a more positive outlook on the benefits of competition than those who have not.

Tariff choice

- 68% of consumers remain on the standard variable tariff despite the option to choose alternative tariffs which have become available in recent years.

- As expected, consumers who have switched electricity suppliers in the last three years are significantly more likely to be on a promotional tariff than consumers who have not switched in the last three years (31% versus 10%).

Broader market engagement

- We consider the level of consumer engagement for different services (landline phone, internet, mobile phone and bank account) and find that the overall level of engagement is low.
- Internet is the most common service for switching provider in NI with 22% of consumers switching in the past 12 months.
- We find that those who have switched electricity supplier in the last three years are also more likely to have switched in other markets.
- Consumers are more likely to have switched landline phone provider (17%), internet provider (22%) or mobile phone provider (21%) in the last 12 months than to have switched electricity supplier (14%).[15] But consumers are less likely to have switched bank account in the last 12 months (10%).

Source: CEPA and Impact analysis

3.1. Energy supplier switching

In this section we examine energy supplier switching in NI. In particular, we look at:

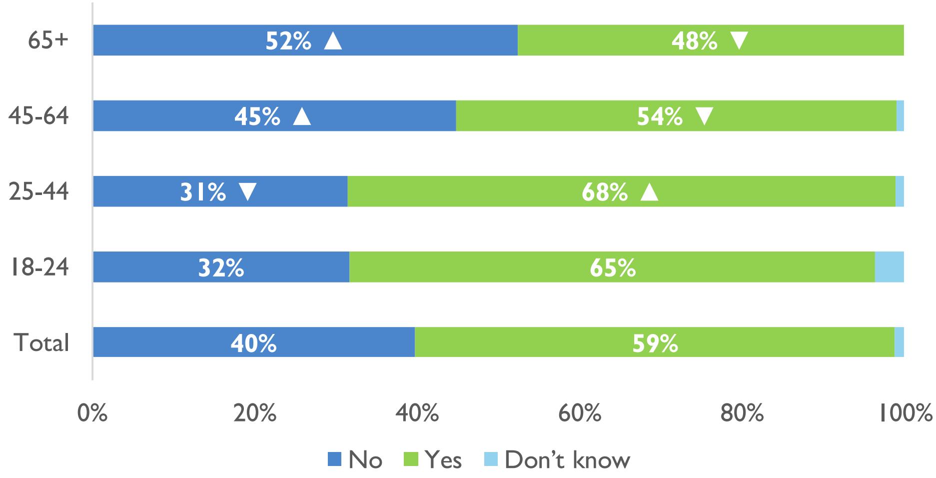
- The level and frequency of energy supplier switching in NI.
- Switching methods used by NI consumers.
- The reasons given by NI consumers for switching or not switching energy suppliers.
- NI consumer perceptions of the switching experience.

3.1.1. Level and frequency of switching

We asked whether survey participants had ever switched supplier. Figure 3.1 and Figure 3.2 below present the percentage of NI electricity and gas consumers who have ever switched electricity or gas supplier, respectively.

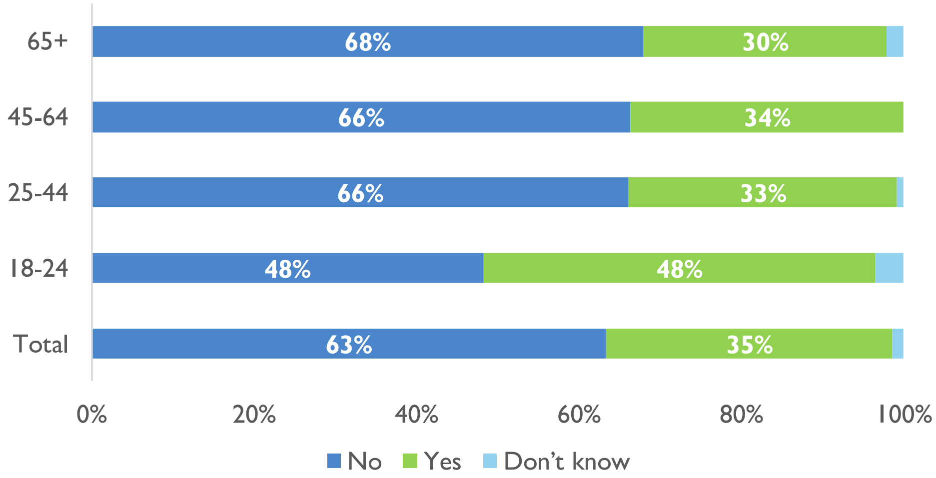
[15] It is important to note that these services may not be completely comparable due to differences in contract terms, for example, contract length.

Figure 3.1: Percentage of electricity consumers who have ever switched electricity supplier (by age group)



Note: Arrows denote whether the sub-group is significantly higher or lower than the average.
Source: CEPA and Impact analysis

Figure 3.2: Percentage of gas consumers who have ever switched gas supplier (by age group)



Note: Arrows denote whether the sub-group is significantly higher or lower than the average.
Source: CEPA and Impact analysis

We find that the majority of electricity consumers have switched supplier at least once (59%). However, a significant number of electricity consumers have never switched electricity supplier (40%).

A greater proportion of gas consumers[16] say they have never switched supplier (63%). However, it should be noted that this may, at least in part, reflect the following:

[16] As we discuss in Section 4, only 25% of consumers said they use gas for home heating. Given that most gas consumers would use the fuel for home heating, this suggests that approximately 25% of the survey population are gas consumers.

- **A number of gas consumers may have only switched to the fuel fairly recently given the relative immaturity of the gas network.** Thus, they may be less likely to have switched supplier since taking up the fuel.
- **Only domestic gas consumers in the Greater Belfast and Larne areas are able to switch suppliers and have only two suppliers to choose from.** Domestic consumers in these areas have a choice between Firmus Energy and SSE Airtricity. In contrast, domestic consumers in the 'ten towns' or 'Gas to the West' networks do not currently have the option to choose their supplier.[17]

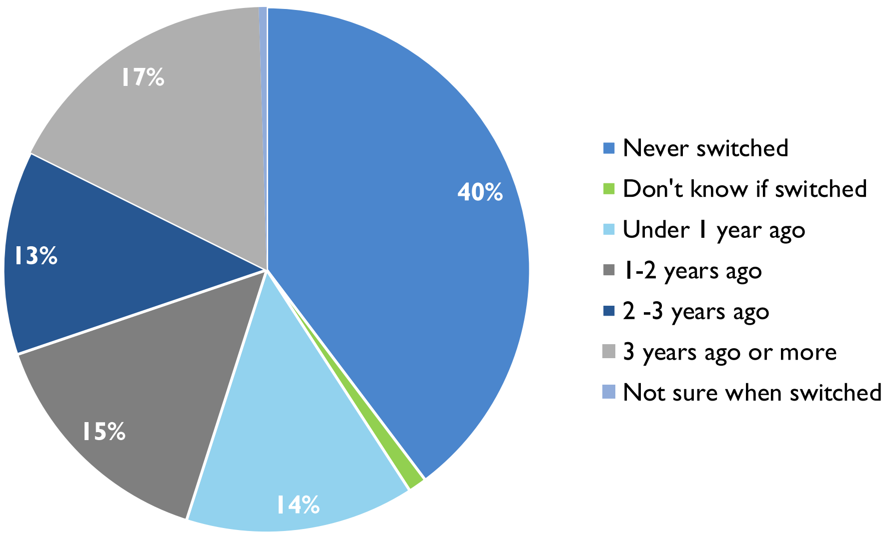
We also compared supplier switching figures across different consumer groups and found:

- **Younger consumers are significantly more likely to have switched electricity supplier than older consumers.** 67% of consumers under the age of 44 have switched electricity supplier, whereas, only 53% of consumers over the age of 44 have switched electricity supplier. The trend is similar for gas where 48% of 18-24 year olds have switched supplier, in comparison to 30% of those over the age of 65. It is interesting to observe that switching levels for 25-44 year olds are significantly higher for electricity (68%) than for gas (33%).
- **Rural electricity consumers are less likely than urban (including 'sub-urban') electricity consumers to have ever switched electricity supplier** (the difference of 53% versus 63% is statistically significant).

It is also interesting to understand how recently consumers have switched supplier. Figure 3.3 and Figure 3.4 examine how recently consumers have switched electricity and gas suppliers respectively (if at all).

[17] Domestic customers in the 'ten towns' network are supplied by Firmus Energy. Domestic customers in the 'Gas to the West' network are supplied by SSE Airtricity.

Figure 3.3: When was the last time you switched electricity supplier? (of all those who use electricity)

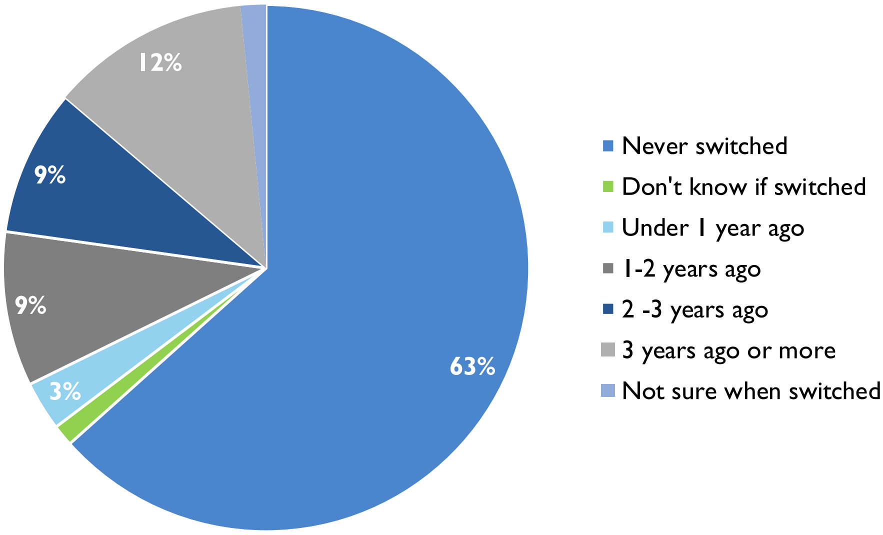


Source: CEPA and Impact analysis

We noted that 59% of consumers had ever switched their electricity supplier. Figure 3.3 above shows that only 42% of consumers have switched in the last three years (we identify these consumers as 'switchers' from this point forwards). The remaining 58% of consumers have either not switched electricity supplier in the last three years ('non-switchers') or do not know if they switched electricity supplier in the last three years.

The relatively low proportion of 'switchers' may reflect relatively high levels of consumer satisfaction with a consumer's existing supplier. As we discuss below, the main reason consumers provided for not switching electricity suppliers is that they were happy with the current service provided (57%) (see section 3.1.4). In addition, the overall level of consumer satisfaction with energy suppliers in NI is relatively high, with only 5% of consumers dissatisfied with the quality of service they receive from their supplier (see section 5.3.3).

Figure 3.4: When was the last time you switched gas supplier? (of all those who use gas)



Source: CEPA and Impact analysis

In Figure 3.4, we examine how recently those who use gas have switched gas supplier. A smaller percentage of respondents have ever switched gas supplier (35%) than electricity supplier, and only 22% have switched in the last three years. However, this is not surprising given that some gas consumers may have only recently gained access to the gas grid and given that retail gas competition is not universal within Northern Ireland but depends on geographic location. Therefore, a lower proportion of consumers have the ability to switch gas supplier.

Ofgem reports on the number of consumers who have switched electricity and gas supplier in the last 12 months in GB.[18] They find that in both cases 18% of consumers switched supplier in the last 12 months. Recent switching appears lower in NI where 14% of electricity and 3% of gas consumers say that they have switched supplier in the last 12 months. But this may not be surprising given that the number of energy suppliers in GB is far greater than in NI. For example, there are 69 active domestic energy suppliers in GB[19] compared with only six active domestic energy suppliers in NI. Coupled with price protection which remains in place[20] and relatively high levels of satisfaction, this may help to explain lower switching levels.

Figure 3.5 explores how the frequency of electricity switching differs across consumer age groups.

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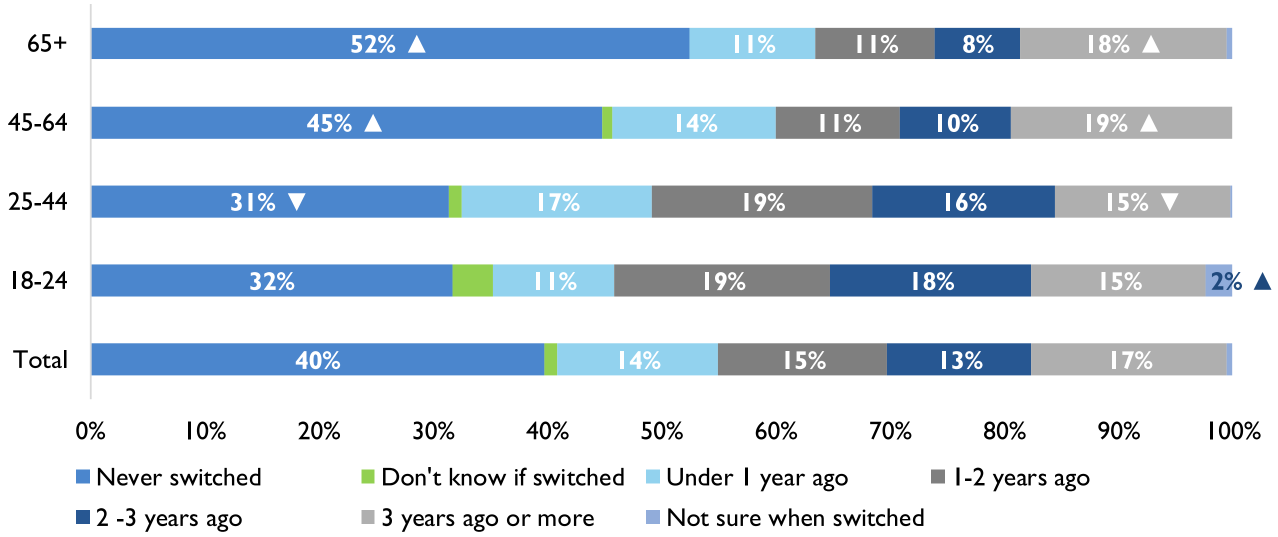
[18] Source: https://www.ofgem.gov.uk/system/files/docs/2018/10/consumer_engagement_survey_2018_report_0.pdf

[19] As of September 2018. Source: https://www.ofgem.gov.uk/data-portal/number-active-domestic-suppliers-fuel-type-gb

[20] The UR determines the maximum price that domestic consumers of Power NI (the incumbent retailer) can pay for their electricity: https://www.uregni.gov.uk/supply-price-controls-and-regulated-tariffs

Figure 3.5: When was the last time you switched electricity supplier? (by age group)



Note: Arrows denote whether the sub-group is significantly higher or lower than the average.
Source: CEPA and Impact analysis

We find that older consumers are less likely to have switched electricity supplier recently:

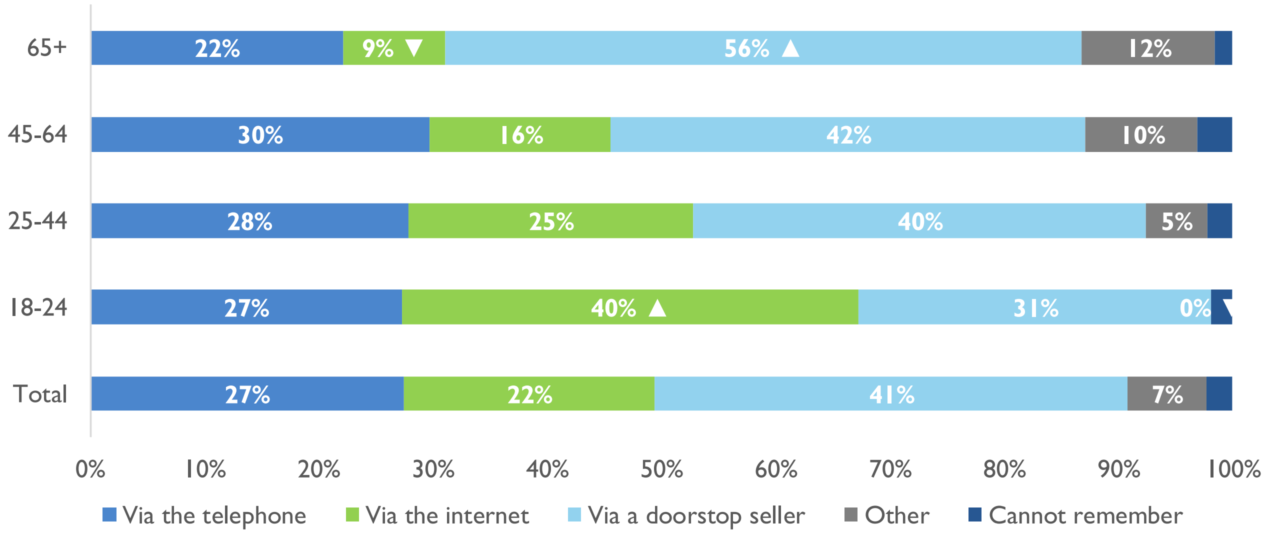
- In total, 51% of consumers aged between 18 and 44 switched electricity suppliers at least once in the last three years.
- In total, 33% of consumers over the age of 44 switched electricity suppliers at least once in the last three years.

We do not find any statistically significant differences in relation to the frequency of switching for different types of gas consumers.

3.1.2. Method of switching

We also asked consumers what method they used to switch energy supplier. The results are presented in Figure 3.6 (electricity) and Figure 3.7 (gas) below.

Figure 3.6: Method of switching electricity supplier (of those who have switched, by age group)



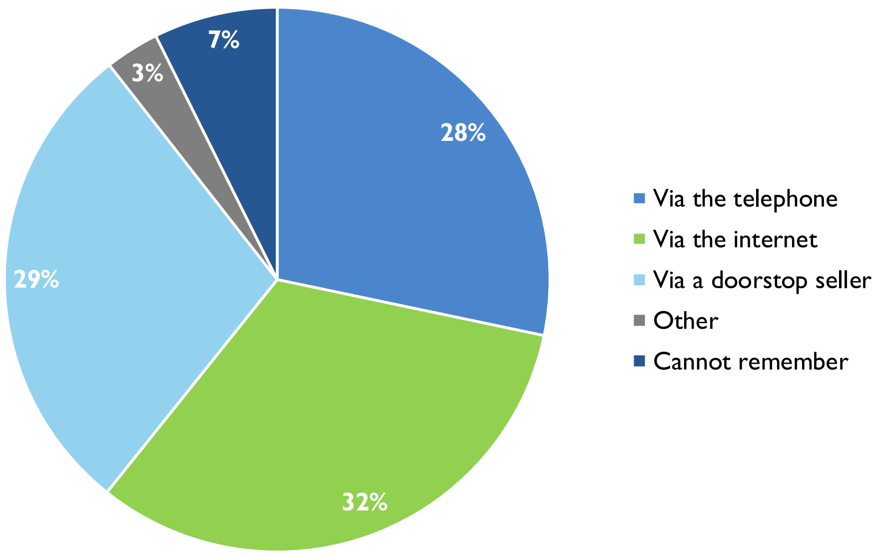
Note: Arrows denote whether the sub-group is significantly higher or lower than the average.
Source: CEPA and Impact analysis

We find that the most common method of switching electricity supplier in NI is via a doorstep seller (41%), especially amongst the 65+ age group (56%). Another 27% switch via direct contact with a supplier over the phone. Only 22% of consumers who have switched electricity supplier used the internet to do so.

As we might expect, we find that the level of switching via the internet is significantly greater for younger consumers than older consumers. Conversely, switching via a doorstep seller is significantly more popular for older consumers.

- Internet switchers: 29% of switchers aged under 45 switched via the internet compared with only 13% of switchers aged 45 or above.
- Doorstep switchers: 37% of switchers aged under 45 switched via a doorstep seller compared with 46% of switchers aged 45 or above.

Figure 3.7: Method of switching gas supplier (of those who have switched)



Source: CEPA and Impact analysis

Consumers who have ever switched gas supplier, a larger proportion switch via the internet (32%) with only 29% of switching done via doorstep selling. This suggests that suppliers of each fuel may adopt different marketing strategies, with doorstep selling more prominent with electricity providers than for gas providers. For gas consumers, we do not find any significant differences between different types of consumers.

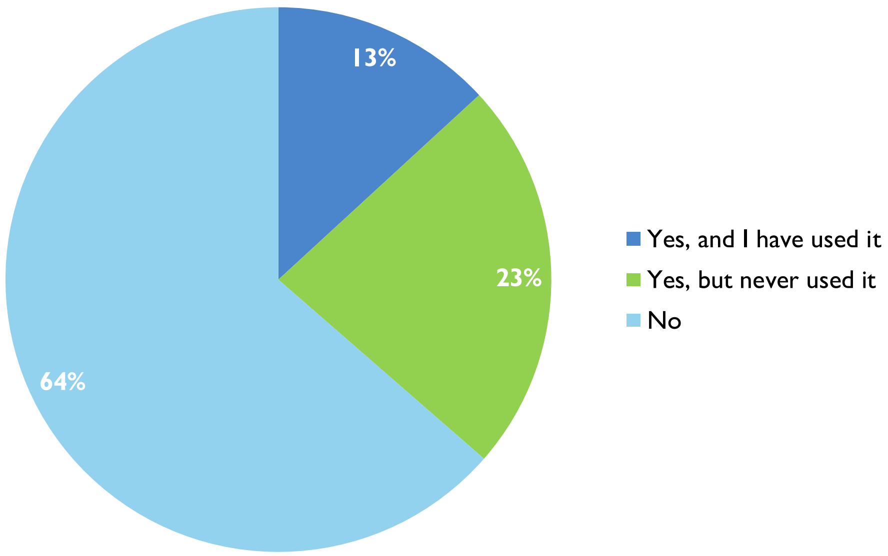
3.1.3. Awareness of the CCNI energy price comparison tool

Where more suppliers and tariff options are introduced into the market, price comparison tools can aid comparison. The Consumer Council NI (CCNI) is the statutory body in NI representing consumer interests in energy and other sectors. The CCNI provides a customer friendly, independent and non-profit energy price comparison tool on its website to enable consumers to compare electricity and gas tariffs for every supplier.21

Figures 3.8 to 3.10 below examine the level of awareness of the CCNI energy price comparison tool at a total population level and across different consumer groups.

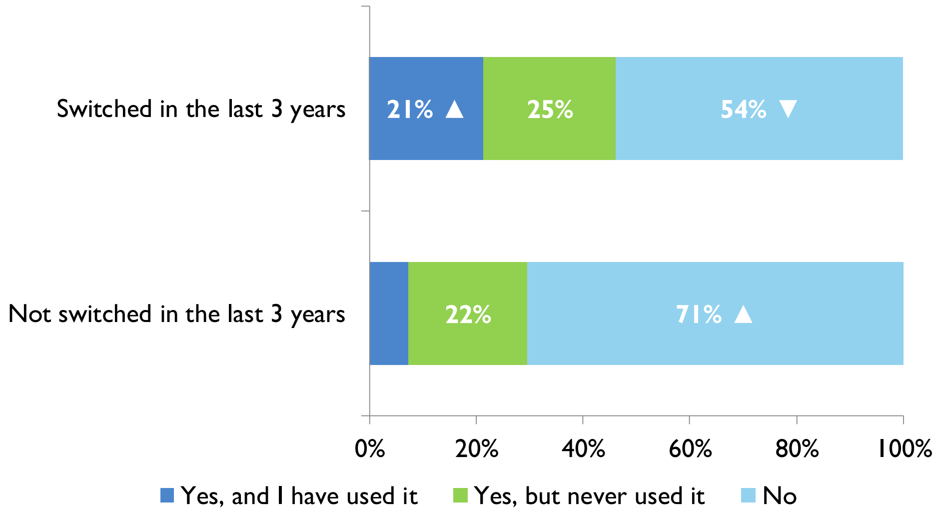
[21] See: http://www.consumercouncil.org.uk/consumers/save-money/energy/considering-switching-supplier

Figure 3.8: Are you aware of the energy price comparison tool provided by CCNI? (total)



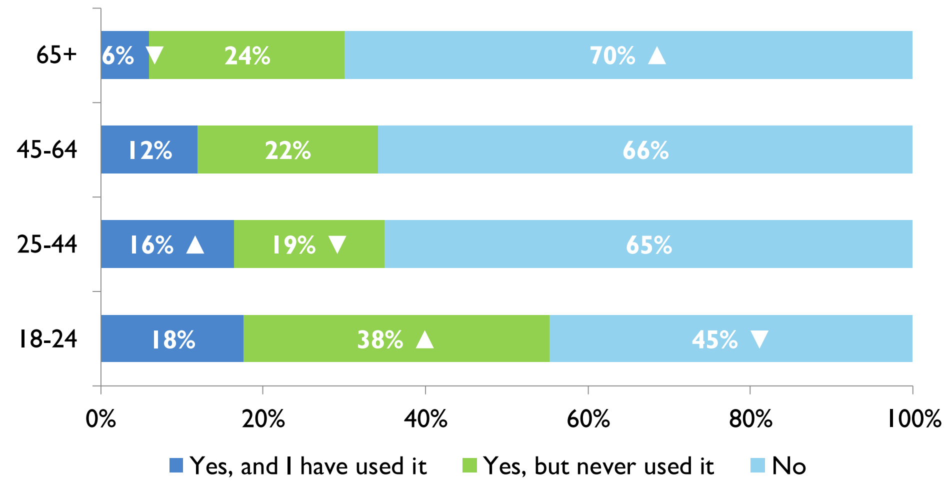
Source: CEPA and Impact analysis

Figure 3.9: Are you aware of the energy price comparison tool provided by the CCNI? (by switching profile, i.e. switched vs. not switched electricity supplier in the last three years)



Note: Arrows denote whether the sub-group is significantly higher or lower than the average.
Source: CEPA and Impact analysis

Figure 3.10: Are you aware of the energy price comparison tool provided by the CCNI? (by age group)



Note: Arrows denote whether the sub-group is significantly higher or lower than the average.
Source: CEPA and Impact analysis

The majority of NI consumers are not aware of the price comparison tool (64%). Even where they are aware of it, few consumers have actually used the tool (13% of the total population). This compares to Ofgem's findings in GB, which suggest that just over a quarter of consumers have compared suppliers in the market, and 42% of switches were made using a third-party service.[22]

When we compared the level of awareness across different consumer groups, we found that:

- **Consumers who have switched electricity suppliers in the last three years are more likely to be aware of the price comparison tool than the average consumer** (46% versus 36%). Despite being more aware of it, only 21% of consumers who have switched suppliers in the last three years have used the price comparison tool.
- **Younger consumers appear to be more aware of and are more likely to have used it than older consumers.** 56% of consumers aged 18-24 are aware of the price comparison tool and 18% have used the tool. In comparison, only 30% of consumers aged 65+ are aware of the tool and only 6% have used the tool.
- **Rural consumers are less likely to have used the price comparison tool than consumers in urban areas** (10% versus 16%).

The relatively low awareness and use of the price comparison website may reflect the fact that there are still relatively few suppliers and tariff offerings in the market. Hence, the need for a comparison tool is not as high as in other markets, such as in GB, where a number of commercial price comparison websites exist. These results may also allow for consideration of how to improve knowledge and uptake of the tool, particularly targeting older consumers and those in rural areas. Alternative options may also be available to make consumers aware of available offerings, which can be more effectively targeted at less informed consumers.

[22] Source: https://www.ofgem.gov.uk/system/files/docs/2018/10/consumer_engagement_survey_2018_report_0.pdf

3.1.4. Reasons for switching

We also asked consumers to state the main reasons why they had switched supplier (or compared suppliers/tariffs). The results are presented in Figure 3.11 below.

Figure 3.11: Reasons for switching supplier (individuals could select more than one response)

1	Saw a promotional offer with another supplier	54%
2	Felt I was overpaying	50%
3	Advised to by family and friends	15%
4	Other	12%
5	Saw a media advertisement	10%
6	Experienced poor customer service	6%
7	Not sure	1%

Source: CEPA and Impact analysis

Potential cost savings from switching appear to be the driving factor behind the decision of most consumers to switch energy supplier – either as a result of being informed of a promotional offer (54%) or as a reaction to a sense of overpaying (50%). Other reasons for switching such as customer service or a reaction to advertising seem to be less important drivers.

It is interesting to see that the main reason for switching was the result of being informed of a promotional offer, but at the same time consumers appear to pay less attention to information about a promotional offer ending than other forms of communication (see Section 5.2). This may lead to consumers moving onto low-priced offers for a limited period of time before falling back onto high-priced tariffs at the end of a promotional term, and without taking the overall costs into account. This so-called 'tease and squeeze' pricing has been criticised in the context of the GB market. In addition, comparisons between these two forms of communication may provide a useful insight into how to keep consumers engaged in the market over time.

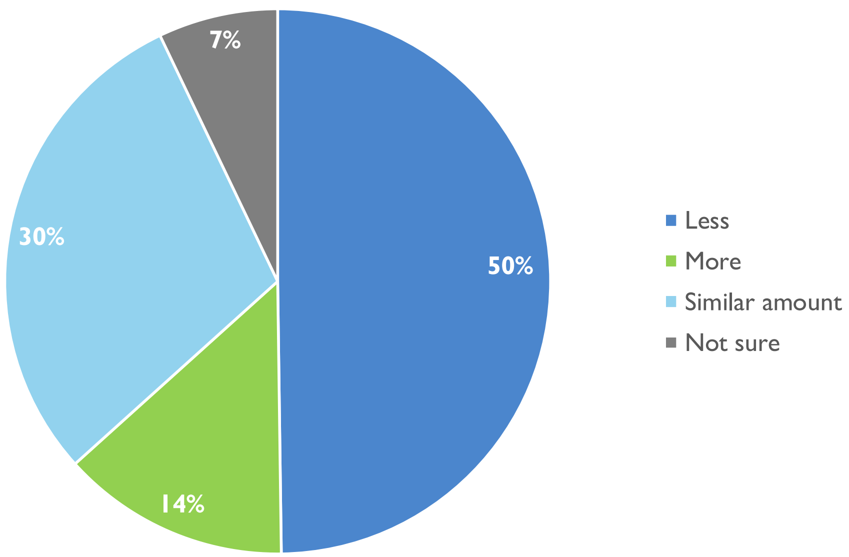
Expected savings often appear to be realised after switching. Figure 3.12 below, shows that half of consumers who have switched electricity supplier consider that they are paying less than they were before they switched (50%), with another 30% paying a similar amount. Similarly, 40% of gas switchers consider that are paying less than they were before they switched, with another 34% paying a similar amount.

In comparison, Ofgem find that 81% of those who switched energy supplier (electricity or gas) think they are paying, or will pay, less.[23] Therefore, consumers in GB may perceive savings from switching energy supplier to be greater than consumers in NI.

However, it is interesting to observe that 14% of consumers who have switched electricity supplier and 16% of consumers who have switched gas supplier believe that they are paying more than they were before they switched. Either these consumers switched for reasons other than cost reductions (e.g. customer service) or do not feel that they have received the reductions in energy costs they were expecting following the switch. Alternatively, these customers may have switched to minimise the additional costs they would face at a time of rising energy costs for all consumers.

In combination with the prevalence of doorstep selling (see Figure 3.6), the UR may want to keep a close eye on post-switch savings. High switching rates through doorstep selling, but with low realised savings, were one symptom which led to the practice being banned for a number of years in GB.

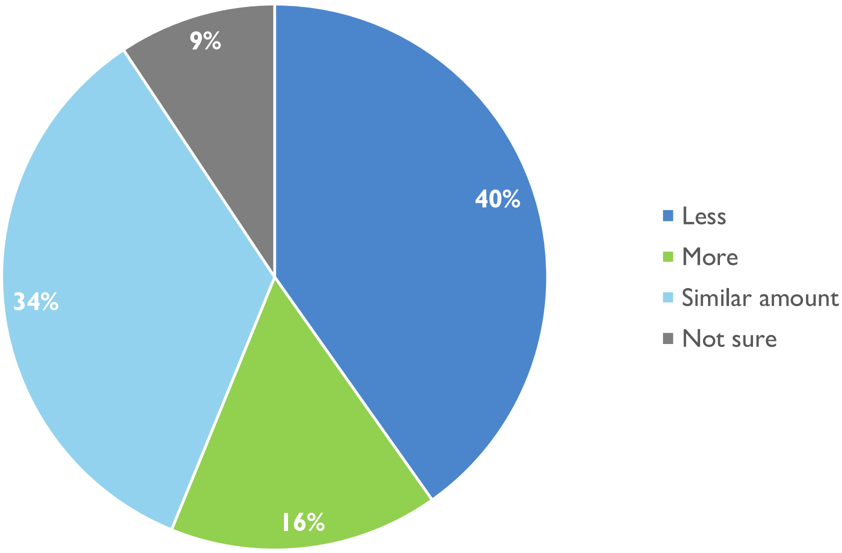
Figure 3.12: Are you paying less than before you switched electricity supplier? (of those who have switched)



Source: CEPA and Impact analysis

[23] Source: https://www.ofgem.gov.uk/system/files/docs/2018/10/consumer_engagement_survey_2018_report_0.pdf

Figure 3.13: Are you paying less than before you switched gas supplier? (of those who have switched)



Source: CEPA and Impact analysis

3.1.5. Reasons for not switching

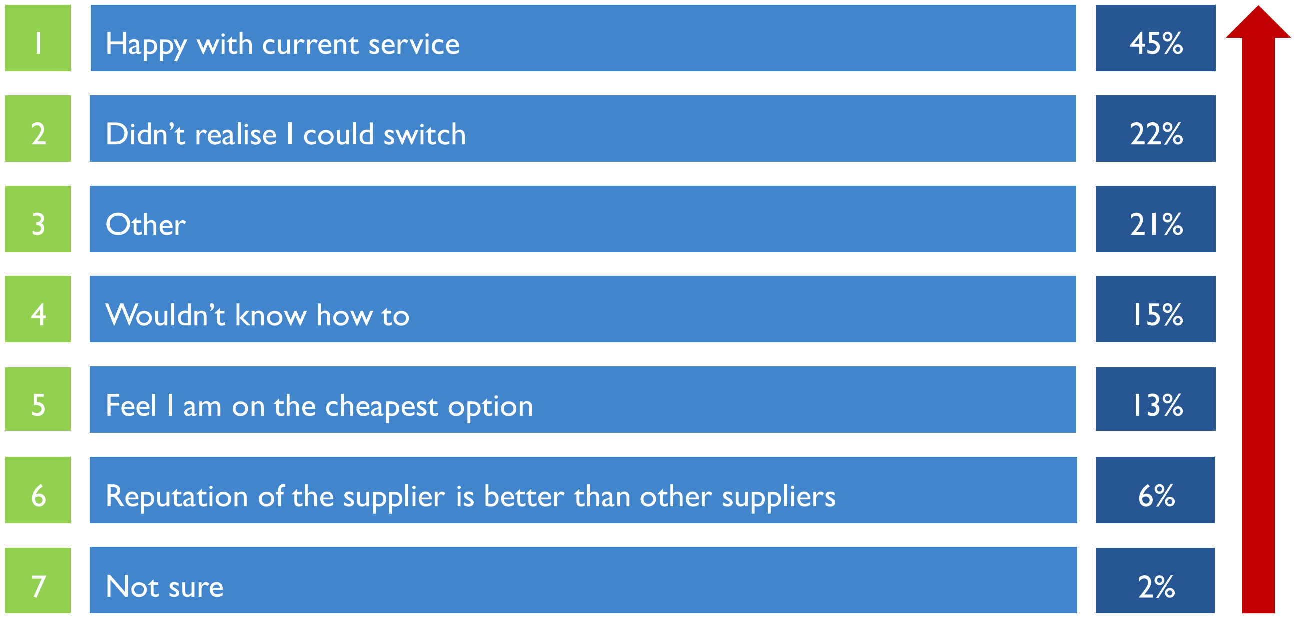
We also asked consumers who said that they had not switched supplier to provide their main reasons. The results are presented in Figure 3.14 below.

Figure 3.14: Reasons for not switching electricity supplier (individuals could select more than one response)

1	Happy with current service	57%
2	Other	21%
3	Reputation of the supplier is better than other suppliers	16%
4	Wouldn't know how to	14%
5	Feel I am on the cheapest option	12%
6	Didn't realise I could switch	9%
7	Not sure	4%

Source: CEPA and Impact analysis

Figure 3.15: Reasons for not switching gas supplier (individuals could select more than one response)



Source: CEPA and Impact analysis

The main reason given by consumers for not switching supplier (both for electricity and gas) is that they are happy with the current service (57% and 45%), which reflects a relatively high level of satisfaction with current suppliers among NI consumers (Figure 5.12).

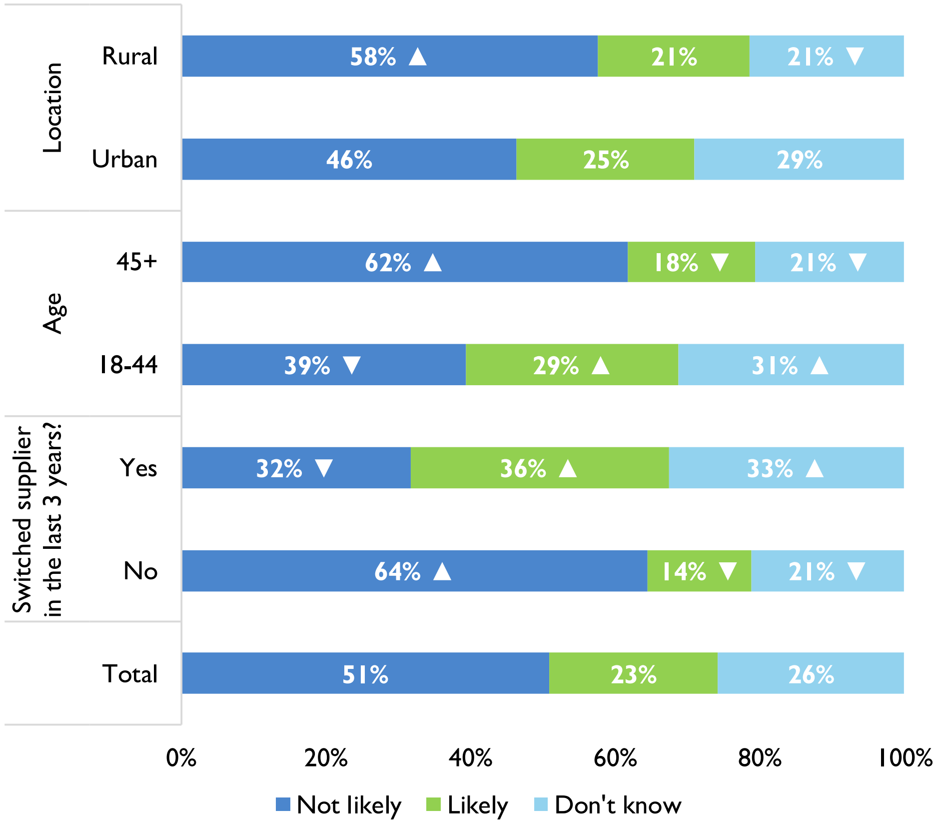
However, a significant proportion of consumers claim that they either did not know they could switch or would not know how to switch. While these percentages are not insignificant for electricity consumers (9% and 14% respectively), a higher percentage of gas consumers (22%) said that they did not realise they could switch, while 15% would not know how. This may reflect the fact that a number of respondents were not able to switch gas supplier – i.e. domestic gas consumers in NI who are based outside of the Greater Belfast area are unable to switch suppliers.

Overall, these results suggest that more could be done to inform NI consumers of the potential to switch and the process for switching energy suppliers where it is possible for them to do so.

3.1.6. Intentions to switch

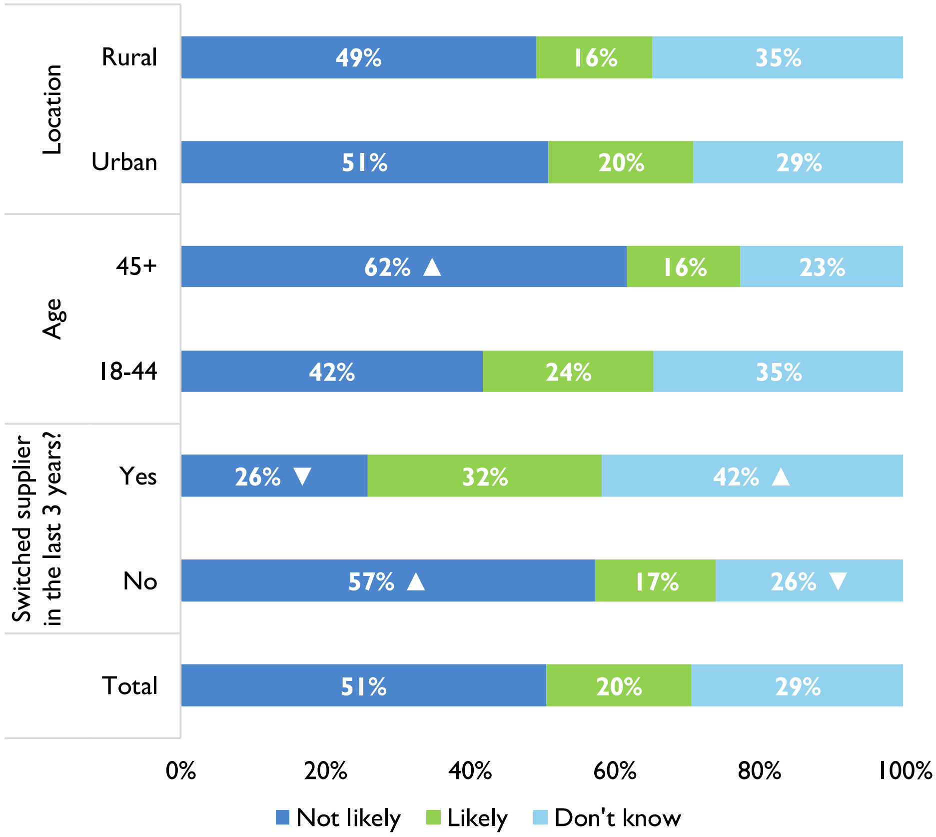
We also asked consumers about their intentions to switch in the future. Figure 3.16 and Figure 3.17 show that the majority of NI consumers are not likely to switch supplier in the next 12 months (51% for both electricity and gas). In contrast, 23% of electricity consumers and 20% of gas consumers believe they are likely to switch suppliers in the next 12 months.

Figure 3.16: Likely or not likely to switch electricity supplier in the next 12 months (by location, age group, and switching profile)



Note: Arrows denote whether the sub-group is significantly higher or lower than the average.
Source: CEPA and Impact analysis

Figure 3.17: Likely or not likely to switch gas supplier in the next 12 months (by location, age group, and switching profile)



Note: Arrows denote whether the sub-group is significantly higher or lower than the average.
Source: CEPA and Impact analysis

We also compared responses between those who have and have not switched electricity/gas supplier in the last three years.

We find that those who have switched electricity supplier in the last three years are significantly more likely to switch again in the next 12 months than 'non-switchers' (36% versus 14%).

However, 32% of electricity consumers who have switched in the last three years state that they will not switch suppliers again in the next 12 months and many are undecided (33%). This may suggest that a number of those who have recently switched electricity suppliers are not sufficiently convinced of the benefits of switching to continue to switch at regular intervals.

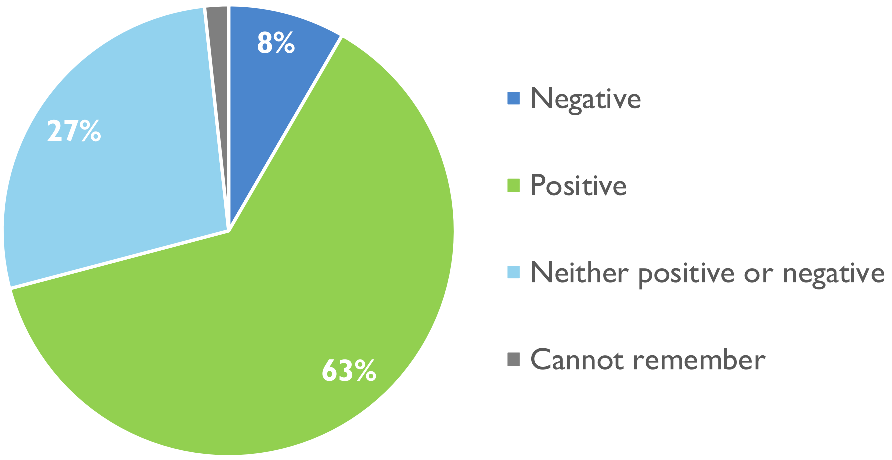
We also find that gas consumers who have switched suppliers in the last three years are more likely to switch supplier in the next 12 months than sticky consumers. However, the difference is not statistically significant, partly due to the relatively low numbers of gas consumers.

Looking across different age groups, we generally find that younger consumers (<44 years old) say that they are more likely to switch energy suppliers in the next 12 months than older consumers. (29% versus 18% for electricity consumers, and 24% versus 16% for gas consumers (though the latter is not statistically significant)). We do not find statistically significant differences between the urban and rural sub-groups in relation to their likelihood of switching in the next 12 months.

3.1.7. Switching experience

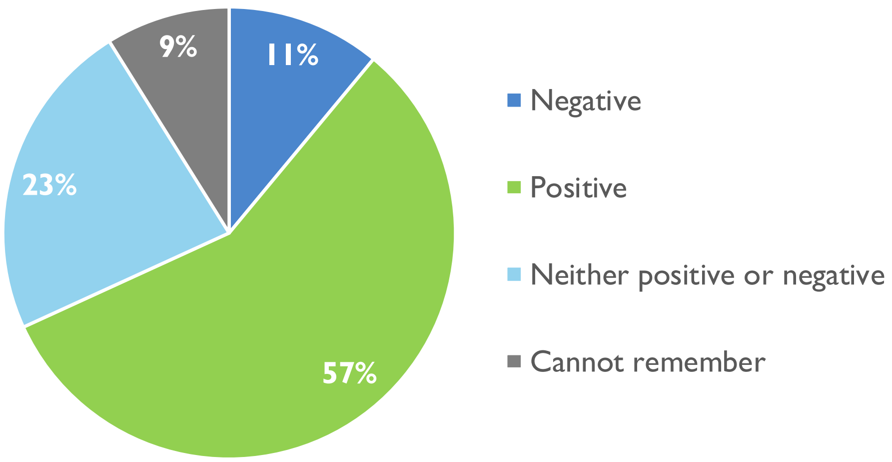
Figure 3.18 and Figure 3.19 present the overall level of satisfaction with energy supplier switching in NI.

Figure 3.18: Electricity switching experience (of those who have switched)



Source: CEPA and Impact analysis

Figure 3.19: Gas switching experience (of those who have switched)



Source: CEPA and Impact analysis

Those consumers who have switched supplier generally have a positive perception of the switching process. Overall, the majority of consumers who have switched energy suppliers in NI report a positive experience of doing so (63% for electricity and 57% for gas). While 8% reported a negative experience for switching of electricity supplier, the percentage was a little higher for gas (11%). If communicated effectively, the generally positive perception of the switching experience may encourage others to consider switching, as these findings suggest that it may be a more positive experience than they anticipate.

Older consumers generally have a more positive outlook of the switching experience than younger consumers. 74% of electricity switchers aged 65+ have a positive outlook, relative to only 44% of electricity switchers aged 18-24. This is an interesting result given that older consumers are significantly more likely to switch via a doorstep seller than younger consumers, while younger consumers are significantly more likely to switch online (see section 3.1.2). While there are likely to be additional factors, this result may imply that NI consumers do not find it particularly easy to switch energy suppliers online, relative to other methods. This is an area that the UR may wish to study further.

3.2. TARIFF CHOICE

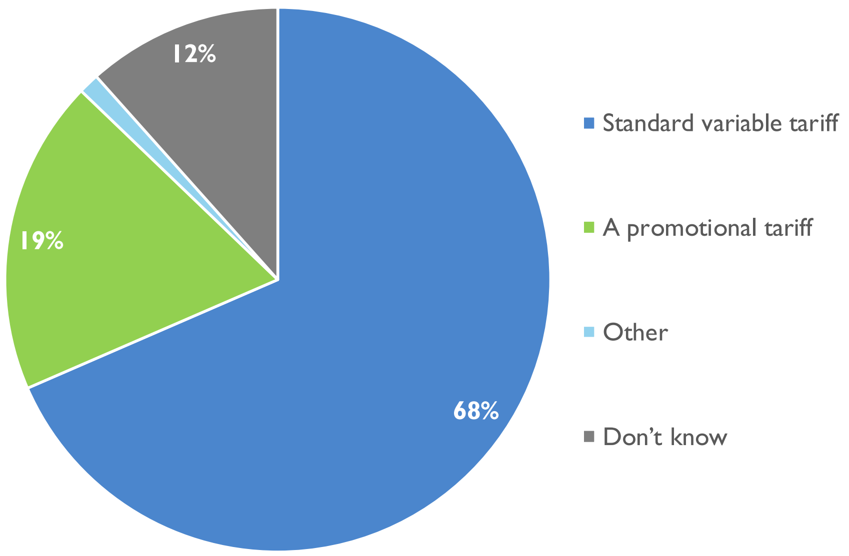
NI consumers have a choice of tariff they can receive from their energy supplier, with the most popular options being:

- **Standard variable tariff (SVT)** – the energy suppliers' default tariff which may vary from month to month. If a customer does not choose a specific energy plan, for example, after their promotional offer ends, they are moved to the supplier's SVT until they choose a new one. SVTs are usually more expensive than 'promotional' deals available in the market.
- **Promotional tariff** – a fixed-priced or discount tariff for a set amount of time. Once the promotional tariff ends the customer is moved on to the supplier's SVT.

The choice of tariff can provide an indication of engagement in the market.

However, despite more promotional tariffs becoming available in the market in recent years, the majority of consumers remain on a standard variable tariff (68%) as shown in Figure 3.20 below.

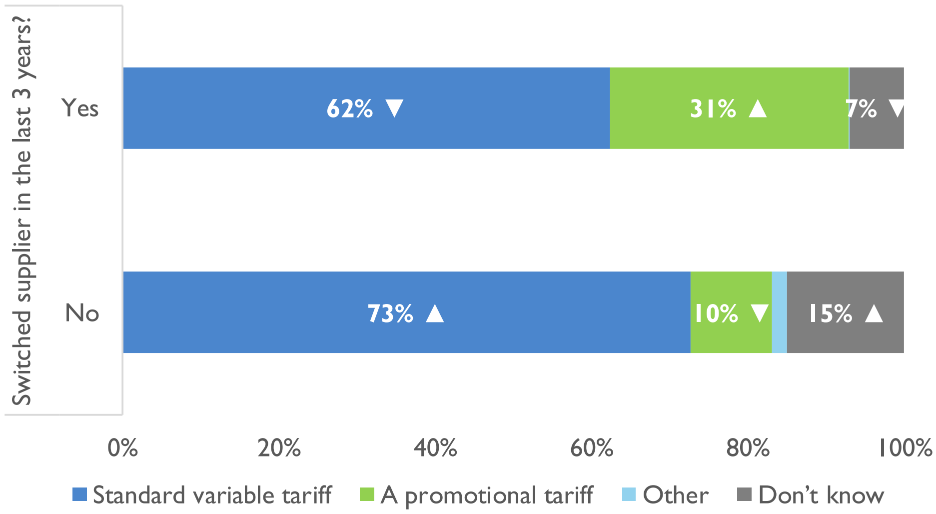
Figure 3.20: Consumer electricity tariff choice in NI (total)



Source: CEPA and Impact analysis

It is also interesting to compare results between those who have switched electricity suppliers in the last three years and those who have not, as shown in Figure 3.21 below.

Figure 3.21: What best describes the tariff you are on for your electricity? (by switching profile)



Note: Arrows denote whether the sub-group is significantly higher or lower than the average.
Source: CEPA and Impact analysis

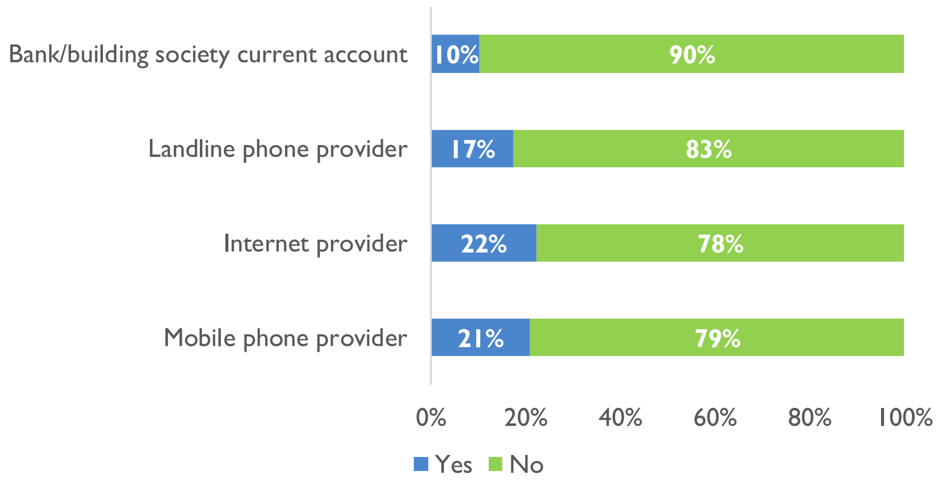
As expected, consumers who have recently switched electricity supplier are significantly less likely to be on an SVT than those who have not (62% versus 73%). Similarly, consumers who have switched electricity suppliers in the last three years are significantly more likely to be on a promotional tariff (31% versus 10%).

We do not present further results for other consumer groups in the main report, but full results for different demographic groups are presented in Appendix B.

3.3. Broader market engagement

We compared intentions to switch in the energy market with other consumer markets.[24] We asked consumers whether they had switched their provider in the last 12 months for a number of non-energy services.

Figure 3.22: Switched provider in the last 12 months for other services



Source: CEPA and Impact analysis

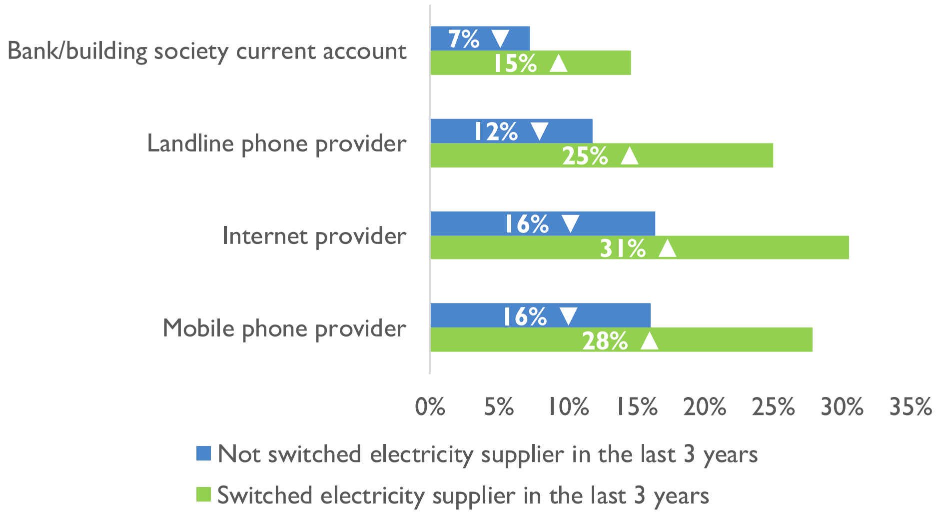
Overall, the large majority of NI consumers have not switched provider in the last 12 months for any of the services listed above. Internet is the most common service for switching provider in NI, with 22% of consumers switching in the past 12 months.

However, only 14% of electricity consumers have switched supplier in the past 12 months. This means that consumers are more likely to have switched landline phone provider, internet provider or mobile phone provider in the last 12 months than to have switched electricity supplier. This is despite the fact that many consumers are able to switch supplier at relatively short notice given the prevalence of SVTs in the market.

It is also interesting to compare the levels of broader market engagement between those consumers who have switched their energy supplier in the last three years and those who have not.

[24] It is important to note that the contract terms for these different services may differ (e.g. different contract lengths). Therefore, the direct comparison of engagement between different markets may not be perfect.

Figure 3.23: Percentage of consumers who have switched providers for other services in the last 12 months



Note: Arrows denote whether the sub-group is significantly higher or lower than the average.
Source: CEPA and Impact analysis

As may be expected, we find that consumers who have switched electricity supplier in the last three years are significantly more likely to be engaged in other markets. We identify a group of 'super-switchers' – consumers who engage across a number of markets to try to benefit from the cost savings they identify.

Looking across other consumer groups, we find that:

- **Younger consumers are significantly more likely than older consumers to be engaged in other markets.** This supports our earlier result, which found that younger consumers are more likely to switch suppliers than older consumers (see Figure 3.5).
- **Pre-payment meter consumers, households with children, and consumers between the age of 25 and 64 are significantly more likely to be engaged in other markets** than the average consumer.
- **Vulnerable consumers** (medium/high) are neither more or less likely to be engaged in other markets than the average consumer.

Table 3.1: Percentage of consumers who have switched providers for other services in the last 12 months (by consumer group)

Broader Market Engagement	Total	Age Group				Children in Household	Pre-Payment Meter
		18 – 24	25 – 44	45 – 64	65+		
Mobile phone provider	21%	39% ▲	25% ▲	16% ▼	10% ▼	26% ▲	29% ▲
Internet provider	22%	34% ▲	30% ▲	18% ▼	7% ▼	27% ▲	29% ▲
Landline phone provider	17%	19%	24% ▲	16%	7% ▼	24% ▲	22% ▲
Bank/building society current account	10%	27% ▲	13%	6% ▼	2% ▼	12%	14% ▲

Source: CEPA and Impact analysis

3.4. Possible areas to explore further

The box below presents possible areas that the UR may wish to consider further based on our analysis of consumer engagement presented in this chapter.

Box 2: Consumer engagement – areas to explore further

- Switching levels are relatively low and many consumers remain on SVTs despite an increase in alternatives. In addition, those who have switched do not necessarily think they will do so again in the next 12 months. The UR may wish to consider the role that it believes switching should play in the market, and whether this implies increasing efforts to encourage switching, e.g. through enhancing communications and awareness, collective switching programmes, etc. Satisfaction with those who have gone through the switching process is relatively high. This could be used to demonstrate to consumers that the risks of something going wrong during the switching process are relatively low.
- The UR may want to conduct further qualitative work to better understand why certain consumer groups (e.g. consumers of different ages) are more or less inclined to switch energy suppliers. This work may help to identify and target strategies to encourage engagement in the market across socio-demographic groups.
- Doorstep selling is the most popular energy supplier switching method in NI. At the same time, a proportion of customers feel worse off after switching. Doorstep selling has had a chequered history in GB with mis-selling investigations in 2010 and a ban in place for a number of years. Therefore, the UR may wish to explore these results in more detail to ensure that consumers who do switch are benefitting from doing so, regardless of the method they use to switch. This is particularly the case given that doorstep selling is more common amongst the elderly who may feel more pressured to switch in this situation.
- Most NI consumers do not switch energy suppliers online and more commonly switch via a doorstep salesman. Therefore, the UR and CCNI may want to conduct further work to understand the extent of benefit and barriers to online switching. The UR may wish to consider the use of online switching in GB where a higher proportion of energy consumers switch via the internet.
- Awareness and use of the CCNI comparison service is relatively low which may be partly explained by the market context. Nevertheless, it would seem that more could be done to promote awareness of the tool. Alternative price comparison methods may be worth exploring. Given the lower number of tariffs on offer, alternatives to online comparison may help to target information at those who are otherwise less engaged in the market.
- We identified a clear difference between awareness of the existence of promotional offers and awareness of communications of a promotional offer ending. This may present a concern of 'tease and squeeze' pricing practices which have been subject to criticism in GB. The UR may wish to further explore how often and for how long consumers fall back onto SVTs after switching to a limited-term promotional offer.

Source: CEPA and Impact analysis

4. FUEL USAGE, SPEND AND AFFORDABILITY

This chapter examines fuel spend and affordability for domestic consumers in NI based on analysis of the following topics included in the survey:

- **Fuel Types**: we analyse the different fuel types that are used for home heating in NI, and whether consumers are likely to switch fuel sources in the coming years. We also examine reasons why some consumers in NI have decided not to switch to mains gas.
- **Fuel Expenditure**: we examine the level of fuel expenditure in NI, and whether there are significant differences between different fuel types. We also analyse the perception of, and estimates of, actual fuel expenditure differences between NI, GB and ROI.
- **Payment method and affordability**: we analyse the different payment methods for energy by consumers in NI, and examine the potential link between payment method and affordability.

Box 3: Fuel usage, spend and affordability – key facts

Fuel Types

- 64% of consumers use oil to heat their home, while 25% use mains gas.
- Consumers in rural areas are less likely to use mains gas than consumers in urban locations. Only 8% of rural consumers use mains gas, compared with 37% of urban consumers.
- 65% of consumers do not plan to switch to another energy source to heat their home.
- 56% of consumers who do plan to switch energy sources for home heating intend to move to mains gas.
- The cost of switching to gas was the main reason given by consumers for not switching to gas central heating. This may reflect the installation cost of a mains gas boiler, the ongoing monthly cost of using gas for home heating which is generally lower than oil, or could be a combination of both (see below).

Fuel Expenditure

- The majority of consumers spend between £30 and £59 per month for electricity in NI, which is in line with the NI average domestic monthly spend on electricity of around £46 per month.[25]
- The majority of domestic consumers considered that NI energy costs were similar to the ROI but more expensive than Great Britain. This does not appear to be reflective of actual energy costs in each region.
- Consumers who use an oil boiler spend more per month to heat their home than those you who use mains gas.

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[25] Source: Northern Ireland Department for the Economy (2018). Energy in Northern Ireland 2018.

Payment Method and Affordability

- 36% of consumers pay for their electricity via monthly direct debit. This makes monthly direct debit the most popular payment method.
- Payment via a pre-payment meter is most popular for low-income and younger households (<45).
- 6% of all customers say that they struggle or always struggle to pay their energy bills in NI. A further 37% say they 'sometimes struggle'.
- The following consumers/households are significantly more likely to say that they struggle or always struggle to pay their energy bills[26]:
    - Those who earn less than £15,500 per annum (12% versus 6%).
    - Those who pay for their energy via a pre-payment meter (11% versus 6%).
- 7% of consumers say that they go without energy due to the associated costs either once a month (4%) or once a week (3%). A further 17% go without energy due to cost a few times a year.
- The following consumer types are more likely than the average to go without energy due to cost once a month or once a week:
    - Those who earn less than £15,500 (13%).
    - Those with children in the household (9%).
    - Those who use a pre-payment meter (12%).
- The main reasons why consumers in NI have a pre-payment meter are convenience (including those who have moved into a house where a pre-payment meter was already in place) and budget/affordability.

Source: CEPA and Impact analysis

4.1. FUEL TYPES

In this section we present our analysis of fuel use in NI. The section is divided into sub-sections on fuel usage, fuel switching, and reasons for not switching to gas.

4.1.1. Fuel usage

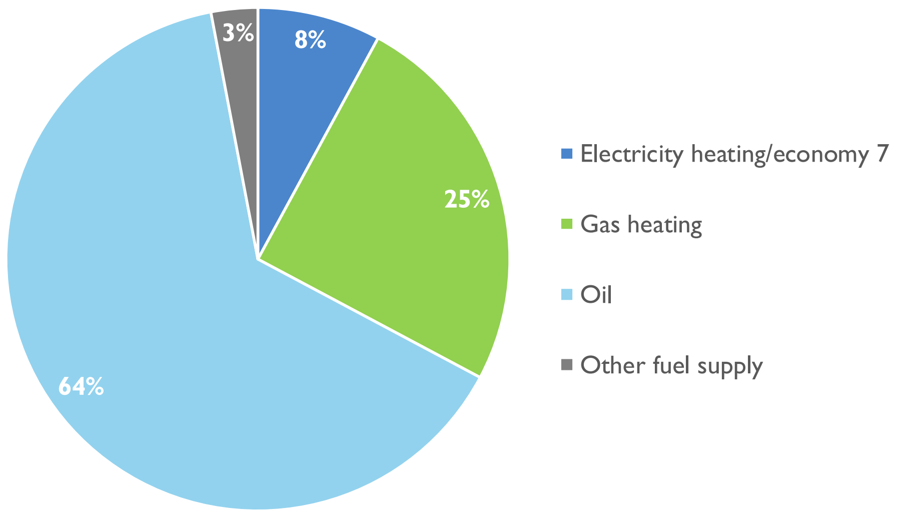
The majority of domestic consumers in NI heat their home using an oil boiler. 64% of domestic consumers heat their home using oil, compared with only 25% of consumers using mains gas. This is in sharp contrast to GB where only 5% of consumers heat their home using oil and 85% use mains gas.[27] The proportion of consumers using oil is also significantly higher than in the ROI, where only 41% of consumers use oil. The difference in the level of mains gas usage between NI

[26] We note that these two demographics are likely to overlap to some degree

[27] Source: Department for the Economy. Energy in Northern Ireland 2018.

and these other markets is in part because the coverage of gas infrastructure is relatively low in NI, due to the infancy of the domestic gas market. For example, 41% of respondents claimed that mains gas is not available at their home. It is expected that 60% of NI households and businesses will have access to natural gas by 2022.[28]

Figure 4.1: Which type of energy do you use to heat your home? (total)



Source: CEPA and Impact analysis

A comparison between urban and rural consumers shows that consumers in rural areas are significantly less likely to use mains gas than consumers in urban locations.

This may reflect availability of gas in rural areas. 70% of rural customers have not switched to gas because they do not have mains gas available at their home. In comparison, only 37% of urban customers, and 45% of sub-urban customers, who have not switched to gas do not have mains gas available at their home.

Comparisons across different age groups highlight that consumers aged 25 or above are significantly more likely to use oil to heat their home than younger consumers (18-24 years old). Conversely, consumers under the age of 25 are more likely to use mains gas to heat their home (34% versus a population average of 25%). This result may be because a greater proportion of young people who are the responsible bill payer (and so have been eligible to respond to the survey) live in urban areas where mains gas is more readily available. 77% of survey respondents aged 18-24 years old who responded to the survey are based in urban or sub-urban areas compared with only 61% of the total population.

Similarly, younger consumers (18-24 years old) are significantly more likely than the average to use electricity to heat their home (23% versus an average of 8% across all consumers).

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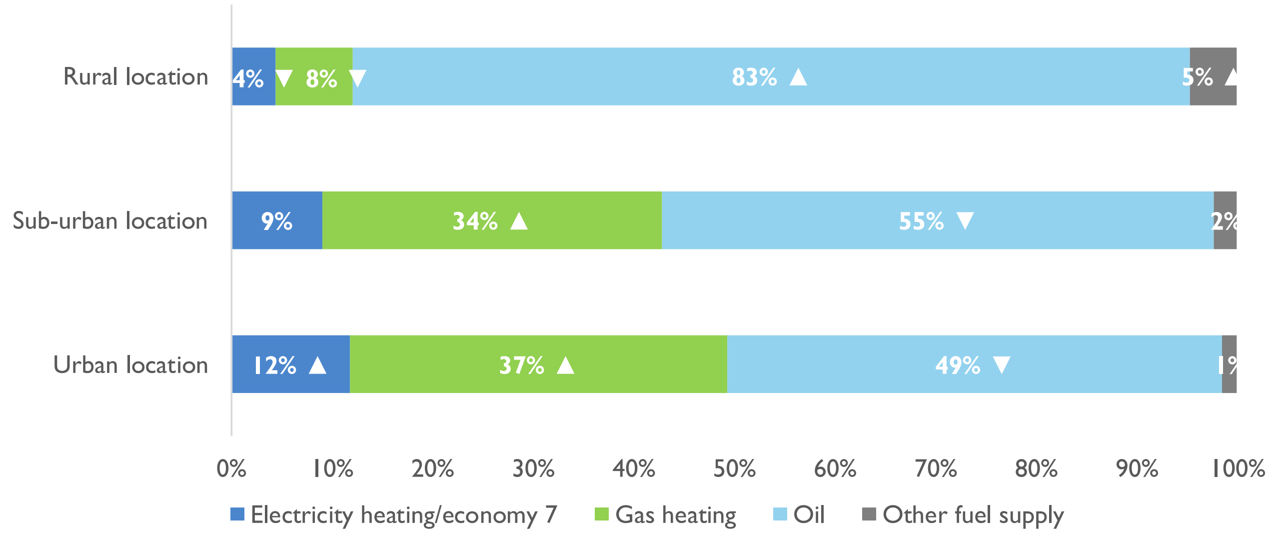
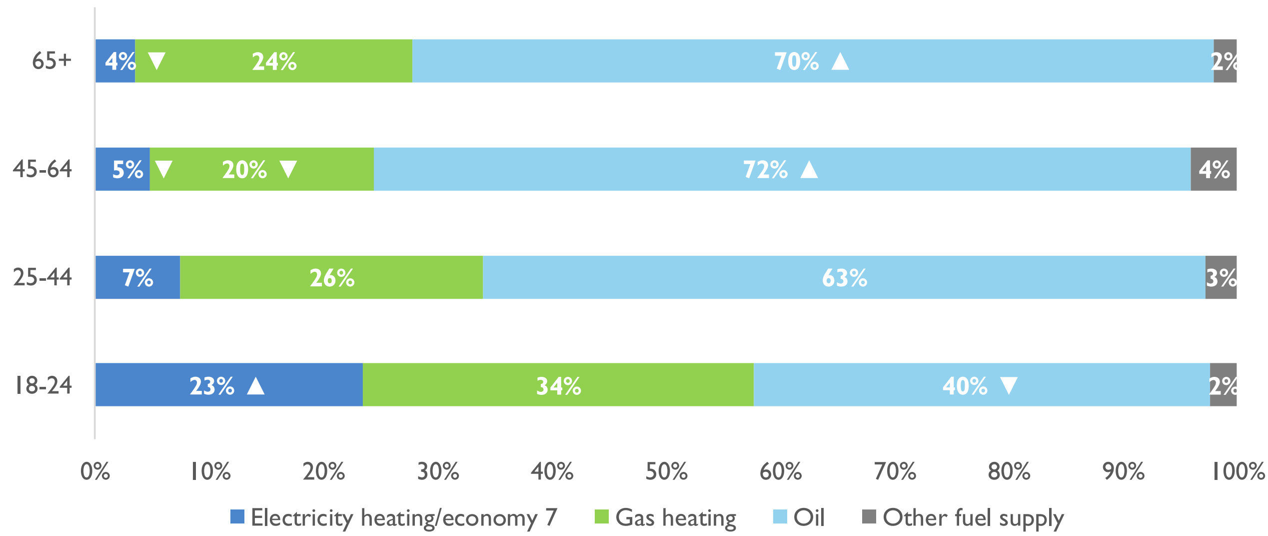
[28] Source: https://www.uregni.gov.uk/market-overview-1

Figure 4.2: Which type of energy do you use to heat your home? (by location)



Note: Arrows denote whether the sub-group is significantly higher or lower than the average.
Source: CEPA and Impact analysis

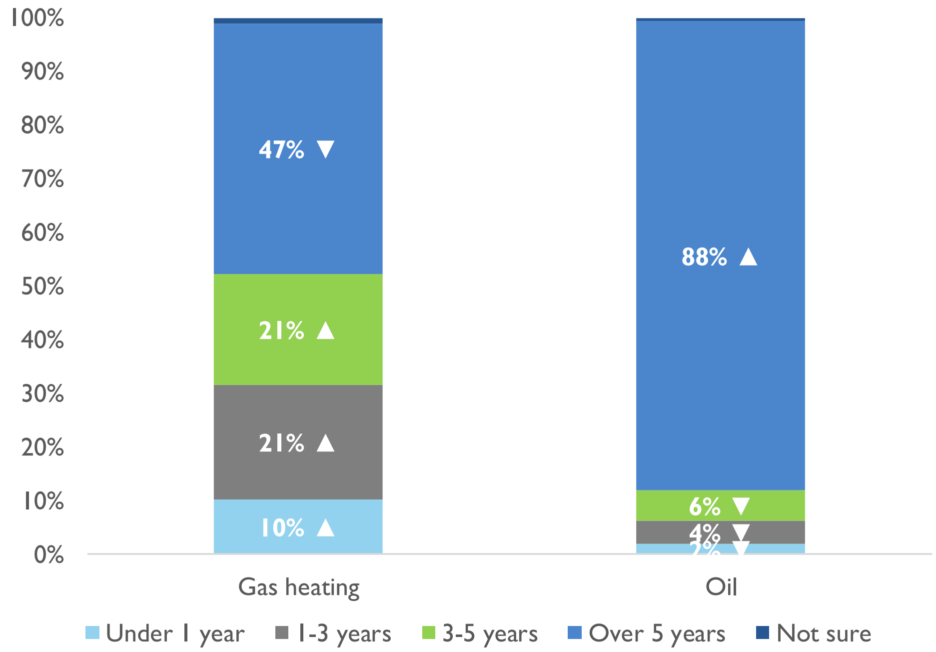
Figure 4.3: Which type of energy do you use to heat your home? (by age group)



Note: Arrows denote whether the sub-group is significantly higher or lower than the average.
Source: CEPA and Impact analysis

Consumers were also asked how long they had been using their existing fuel source to heat their home. We focus on consumers who use oil or mains gas for home heating as these two sources are used by 89% of domestic consumers in NI.

Figure 4.4: How long have you been using your existing heating source?



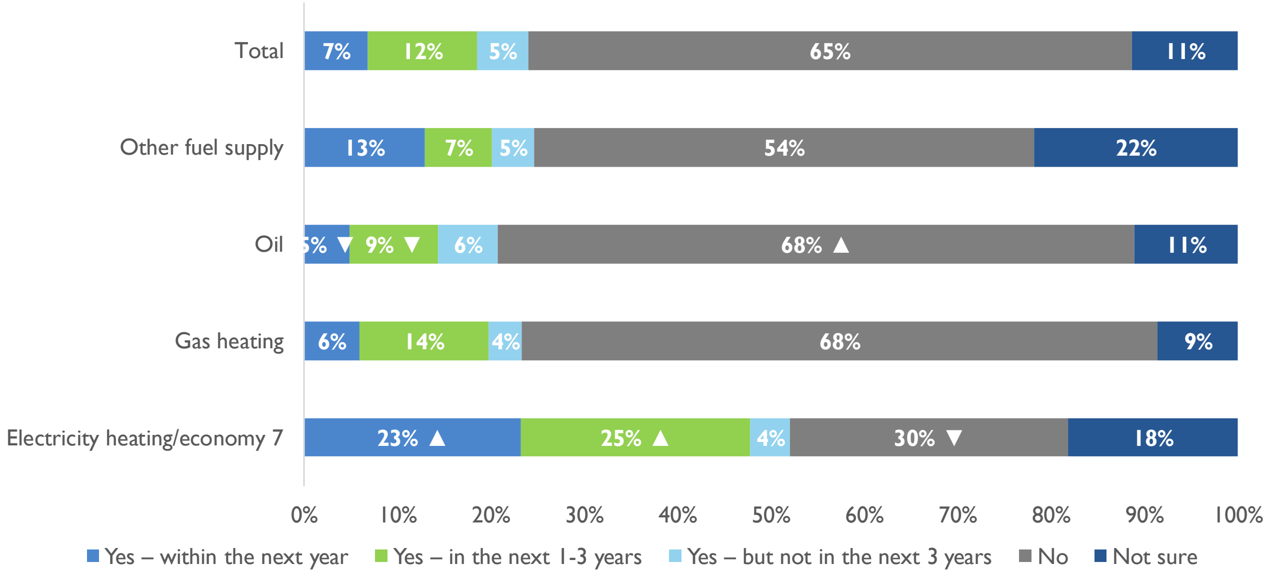
Note: Arrows denote whether the sub-group is significantly higher or lower than the average.
Source: CEPA and Impact analysis

The majority of mains gas users have been using gas for 5 years or less (52%), which reflects the fact that gas connections are relatively new in NI. In contrast, the majority of oil users have been using oil to heat their home for more than 5 years (88%).

4.1.2. Fuel switching

We considered the level of interest in switching fuels. We asked domestic consumers whether they plan to switch to another energy source to heat their home, as shown in Figure 4.5 below.

Figure 4.5: Do you think you will switch to another energy source to heat your home? (by fuel source)



Note: Arrows denote whether the sub-group is significantly higher or lower than the average.
Source: CEPA and Impact analysis

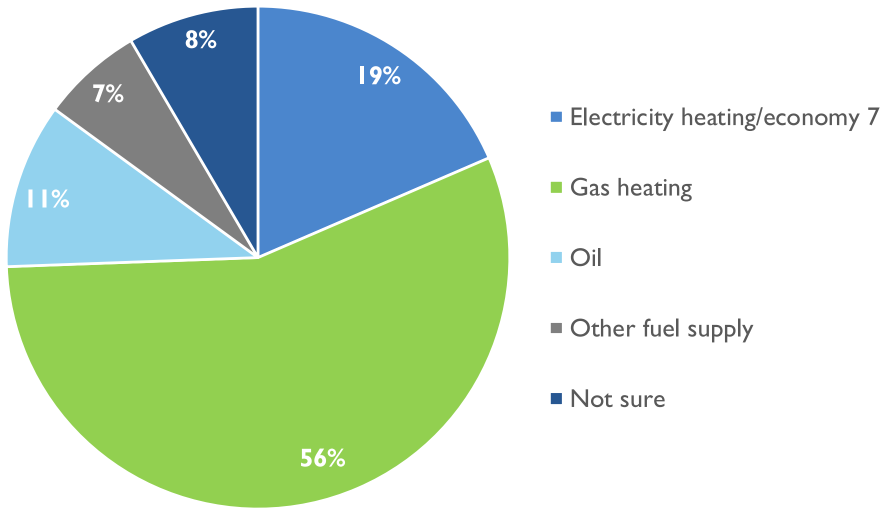
We found that 68% of both oil and gas consumers do not think they will switch to another energy source to heat their home. In the case of oil, this may partly reflect a lack of access to the gas grid. Nevertheless, these results suggest that more could potentially be done to ensure that consumers are aware of the benefits of switching to alternative fuel sources where available.

It is interesting to find, however, that a total of 52% of consumers who use electricity to heat their homes say that they think they will switch fuel type, and 23% stated that they think they will switch in the next year. This may imply some level of dissatisfaction with electricity as a home heating source and indicate that some consumers may switch away from electricity heating to alternative fuels in the coming years.

Figure 4.6 shows the energy source consumers think they will switch to if they do think they will switch to another energy source.

Of those consumers who think they will switch energy sources for home heating, 56% say they would move to mains gas heating, compared with only 11% of consumers who would to switch to oil. As a result, we may expect to see an increase in the proportion of NI consumers using mains gas to heat their homes in the coming years.

Figure 4.6: Which energy type do you intend to switch to for heating your home? (of those who stated that they intend to switch their fuel source for home heating)



Source: CEPA and Impact analysis

Nevertheless, it is interesting to observe that there is a small but important minority of consumers who have either switched to oil in the last 5 years (12%, Figure 4.4) or think they will switch to oil in coming years (11%). This may suggest that some consumers prefer oil heating even when they are presented with, or have tried, alternatives. For example, of the 23% of existing gas users who intend to switch to a different fuel source in the coming years (Figure 4.5), 30% intend to switch to oil.

We consider this area requires further qualitative work by the UR as the decision to switch to oil is likely to be more nuanced than this quantitative analysis allows us to understand. In some cases, the decision to switch fuels (for example to oil) may be the result of a house move rather than a conscious change of fuel source in the same house. Similarly, consumers thinking about switching to oil would have to carefully consider the upfront costs and hassle of switching before any switch was made, which may ultimately affect their decision.

4.1.3. Reasons for not switching to gas

There remain a number of consumers who continue to use oil rather than mains gas to heat their home despite having the option to switch fuel. Consumers stated a number of reasons why they have not chosen to switch to mains gas. Table 4.1: below presents the top five reasons for not switching to gas for all of those who had the option but have not. We separate this across different age groups.

We do not find any important statistically significant differences from the general population when we consider other demographics, including vulnerable consumers. However, full results can be found in Appendix B.

Table 4.1: Top 5 reasons for not switching to gas (for those with available gas)

Reason for not switching to gas	Total	Age Group			
		18-24	25-44	45-64	65+
Cost	37%	31%	43%	38%	31%
Hassle	15%	31%	8%	11%	22%
Do not trust gas	14%	6%	14%	14%	17%
Happy with oil	13%	6%	7%	18%	19%
Renting	8%	13%	13%	6%	3%

Note: Arrows denote whether the sub-group is significantly higher or lower than the average.
Source: CEPA and Impact analysis

The cost of switching to gas is the most common reason why consumers have decided not to switch to gas when the option of using mains gas is available. We also made comparisons across age groups and found:

- Older consumers are less likely to trust gas and are also more likely to be happy using oil. As a result, even if the cost of mains gas decreased, some older consumers may still prefer to stick with oil.
- Younger consumers (those aged 18-44) are more likely to rent than own property. Hence, renting is selected more often as a reason for not switching to gas by younger consumers because renters may be less able to decide what heating fuel source they use.
- The 'hassle factor' was particularly important for the very young (18-24 year olds) and the elderly (65+).

The analysis above suggests that even with expansion of the gas grid, there are likely to be a number of consumers who continue to prefer to use oil for home heating even in the presence of possible cost savings. Some barriers to greater take up of gas (such as the 'hassle factor' and distrust of the fuel) could be reduced through improving the ease of fuel switching and through communication programmes. Further qualitative research could help the UR to better understand the reasons why some NI consumers are not inclined to switch to mains gas, which could lead to additional policy suggestions.

4.2. FUEL EXPENDITURE

In this section we present the analysis on fuel expenditure in NI. The section is separated into sub-sections on heating (gas, oil and other fuel sources) and electricity expenditure. We have not separated heating and non-heating costs for consumers who use electricity to heat their home, as we consider that this separation would be difficult for consumers to accurately estimate.

4.2.1. Heating expenditure

Table 4.2 below shows how monthly expenditure on home heating differs by fuel source.[29]

Table 4.2: Monthly expenditure to heat home (by fuel source)[30]

Monthly spend to heat home	Gas heating	Oil	Other fuel supply e.g. gas canisters/coal/solid fuel
Up to £30	18%	2%	33%
£30-59	42%	26%	24%
£60-99	28%	34%	10%
£100 or more	8%	23%	23%
Don't know	4%	16%	10%

Source: CEPA and Impact analysis

Overall, those who use oil to heat their home appear to spend more per month than those who use gas or other fuel sources (e.g. gas canisters, coal or solid fuel). The majority of oil users (57%) spend more than £60 per month. Whereas, 60% of mains gas users spend less than £60 per month.

Interestingly, the main reason stated by consumers for why they have not switched to gas to heat their home is cost (37% of consumers with gas available, Table 4.1). This is despite monthly expenditure on gas heating being lower than expenditure on oil heating. This may reflect a combination of the upfront capital cost required to install a mains gas boiler and the potential for misconceptions regarding the ongoing costs of gas relative to oil.

It is also interesting to compare heating expenditure between different consumer groups. Figure 4.7 below compares household heating expenditure (gas and other fuel sources) for pre-payment consumers, consumers over the age of 65 and vulnerable consumers (medium/high).[31]

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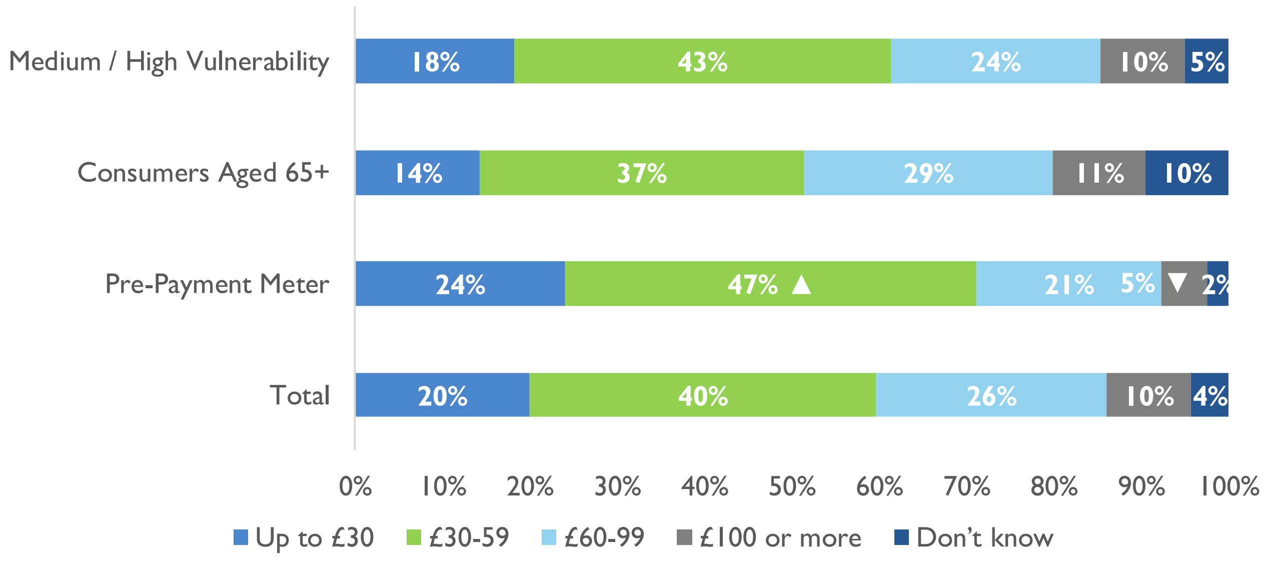
[29] Excluding consumers who use electricity for home heating because it is not possible to distinguish between electricity used for home heating versus other uses.

[30] Statistical significance cannot be inferred as monthly expenditure was determined differently for oil expenditure compared with gas heating and other fuel sources (e.g. gas canisters/coal/solid fuel).

[31] We do not consider the effect of property size within the analysis, but this may be interesting to explore (either quantitatively or qualitatively) in future research.

Figure 4.7: Monthly spend to heat home (gas and other sources, by consumer group)



Note: Arrows denote whether the sub-group is significantly higher or lower than the average.
Source: CEPA and Impact analysis

We make three key observations based on Figure 4.7 above:

- **Pre-payment meter consumers spend less per month on heating than the average consumer**. This may be because:
    - Pre-payment meter customers place greater emphasis on **budgeting** (see Figure 4.13).
    - Pre-payment meter customers tend to be **younger (18-44 years old)** and have **lower incomes** (see Figure 4.11). 40% of consumers under the age of 45 have a pre-payment electricity meter, compared with only 23% of consumers aged over 44. Similarly, 43% of consumers with incomes less than £15,500 have a pre-payment electricity meter compared with only 15% of consumers with incomes greater than £40,000.
    - **Pre-payment meter consumers are more likely than the average consumer to ration their energy use** (e.g. we find that 12% of pre-payment meter customers go without energy due to cost often, compared to an average of 7%, see Figure 4.14).
    - **Pre-payment meter consumers tend to live in smaller properties** than the average consumer and as a result spend less on heating.
- **Consumers over the age of 65 appear to spend more than average on heating their home** (40% of consumers over the age of 65 spend over £60 per month to heat their home, compared with only 36% of all consumers). It is likely that these consumers are at home more often than consumers in other age groups, and may therefore require a higher level of heating and consume more energy. In addition, older consumers are more

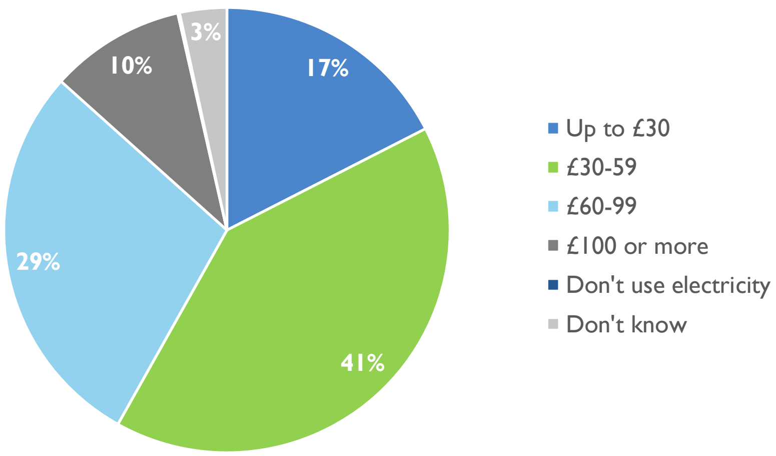
likely to use oil rather than gas to heat their home (see Figure 4.3), which is more expensive.

- **We do not identify any statistically significant difference in the monthly spend of vulnerable consumers (medium/high) relative to the general population,** based on the available sample size.

4.2.2. Electricity expenditure

The figure below presents monthly household expenditure on electricity in NI. Overall, the majority of consumers spend between £30 and £59 per month on electricity. This result is in line with the UK average monthly spend on electricity, which is around £46 per month.[32]

Figure 4.8: Monthly electricity spend in NI (total)

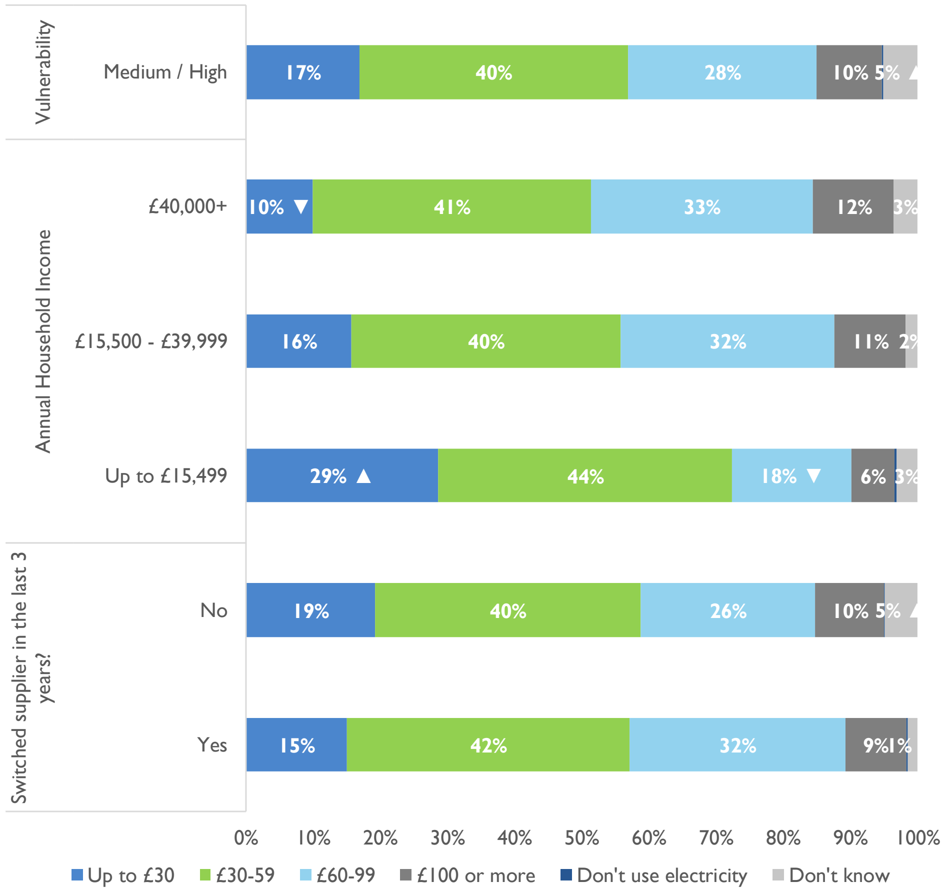


Source: CEPA and Impact analysis

Figure 4.9 below presents monthly electricity spend disaggregating by different consumer groups – by consumers who have switched electricity suppliers in the last three years versus those who have not, by income level, and by those defined as being vulnerable (medium/high).

[32] Source: Northern Ireland Department for the Economy (2018). Energy in Northern Ireland 2018.

Figure 4.9: Monthly electricity spend in NI (by consumer group)



Note: Arrows denote whether the sub-group is significantly higher or lower than the average.
Source: CEPA and Impact analysis

All else equal, we may expect consumers who switch suppliers more frequently to spend less on electricity than those who have not, because they are more able to benefit from promotional offers. However, we do not observe this. In fact, on the whole, those who switched suppliers less than three years ago appear to spend slightly more on electricity than those who have not switched suppliers. Though a number of causal explanations could be suggested, the data does not appear to provide a clear explanation for this finding.

As we may expect, we find that consumers with high household incomes spend more on electricity than those who have lower household incomes. For example, 73% of consumers who earn under £15,500 per annum spend under £60 on month on electricity. In contrast, only 51% of consumers who earn over £40,000 per annum spend under £60 per month on electricity.

We do not find any statistical evidence to suggest that vulnerable consumers spend any more or less on electricity than the average consumer.

4.2.3. Comparison with GB and ROI

Consumers were asked how they thought the costs of gas and electricity in NI compared to the Republic of Ireland (ROI) and GB. The figure below summarises the responses. Many consumers said that they did not know how the costs of gas and electricity in NI compared with other jurisdictions.

Figure 4.10: How NI consumers perceive their energy costs compare to ROI and GB?

Compared to ROI

- Don't know = 43%
- Similar costs = 20%
- Slightly more expensive = 14%
- Slightly cheaper = 14%
- Significantly more expensive = 5%
- Significantly cheaper = 5%

Compared to GB

- Don't know = 27%
- Slightly more expensive = 23%
- Significantly more expensive = 16%
- Similar costs = 18%
- Slightly cheaper = 11%
- Significantly cheaper = 5%

Source: CEPA and Impact analysis

For those consumers who did express a view, the majority of consumers considered that NI energy costs were similar to the ROI but more expensive than in Great Britain.

In contrast, when actual electricity and gas prices are considered, it would appear that NI consumers face lower prices than those in both ROI and Great Britain.

Comparing the NI regulated electricity price against available electricity prices in the EU reveals that the NI regulated domestic tariff in the last half of 2017 (14.2 pence/kWh) was around 14% below the UK electricity price (16.5 pence/kWh) and 32% below the ROI electricity price (21.0 pence/kWh).[33]

Similarly, a comparison of unit electricity cost and average electricity bills for credit, direct-debit and pre-payment customers across UK regions shows that the average NI unit cost and annual bill was 11.1% below the UK average.

Table 4.3: Average annual domestic standard electricity bills in 2017 (NI versus UK average)

	Overall		Credit		Direct Debit		Pre-payment	
	Unit Cost (p/kWh)	Bill	Unit Cost (p/kWh)	Bill	Unit Cost (p/kWh)	Bill	Unit Cost (p/kWh)	Bill
NI	14.48	550	14.69	558	14.45	549	14.41	548
UK Average	16.30	619	17.63	670	15.81	601	16.28	619

Source: Northern Ireland Department for the Economy (2018). Energy in Northern Ireland 2018.

The UR also publish information on domestic gas prices.[34] This found that the average unit price of gas for medium sized domestic customers in NI during the last half of 2017 (3.98 pence/kWh) was around 7% below the equivalent UK gas price (4.27 pence/kWh) and 31% below the equivalent ROI gas price (5.78 pence/kWh).

[33] Source: Northern Ireland Utility Regulator (August 2018). Quarterly Transparency Report.

[34] Source: Northern Ireland Utility Regulator (August 2018). Quarterly Transparency Report.

4.3. PAYMENT METHOD AND AFFORDABILITY

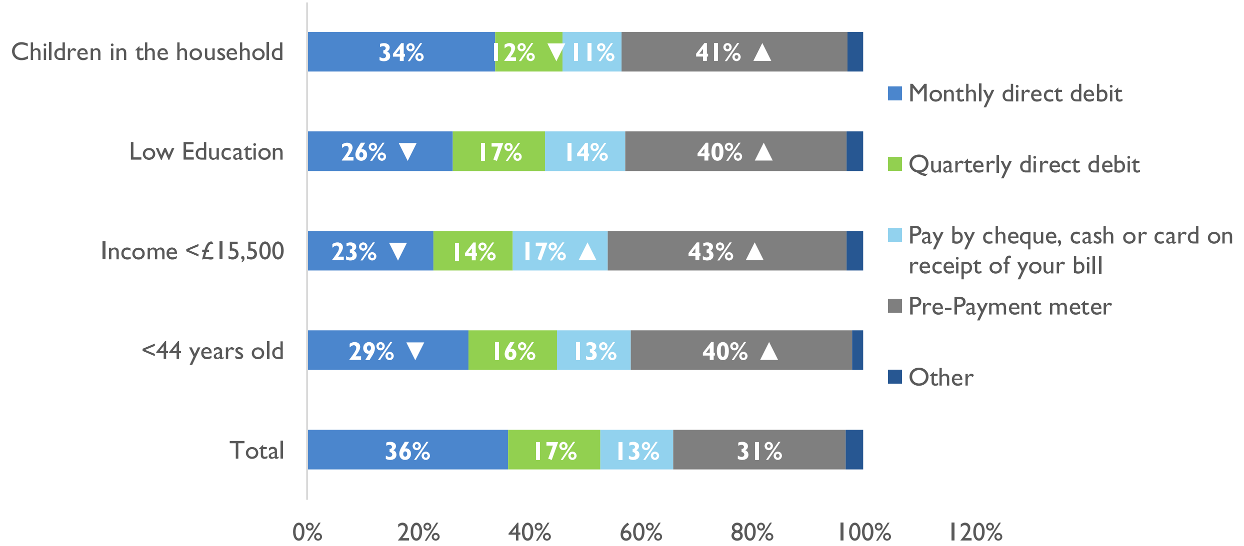
In this section we examine different payment methods used by NI consumers to pay for electricity, reasons why some consumers choose to have a pre-payment meter, and affordability issues in NI.

4.3.1. Payment method

The figure below breaks down electricity consumers by payment method. Overall, monthly direct debit is the most popular electricity payment method followed by use of a pre-payment meter. However, pre-payment meters are most popular for consumers/households who are:

- aged less than 44;
- with earnings of less than £15,500 per annum;
- with the lowest level of education; or
- with children.

Figure 4.11: Payment method (by consumer group)

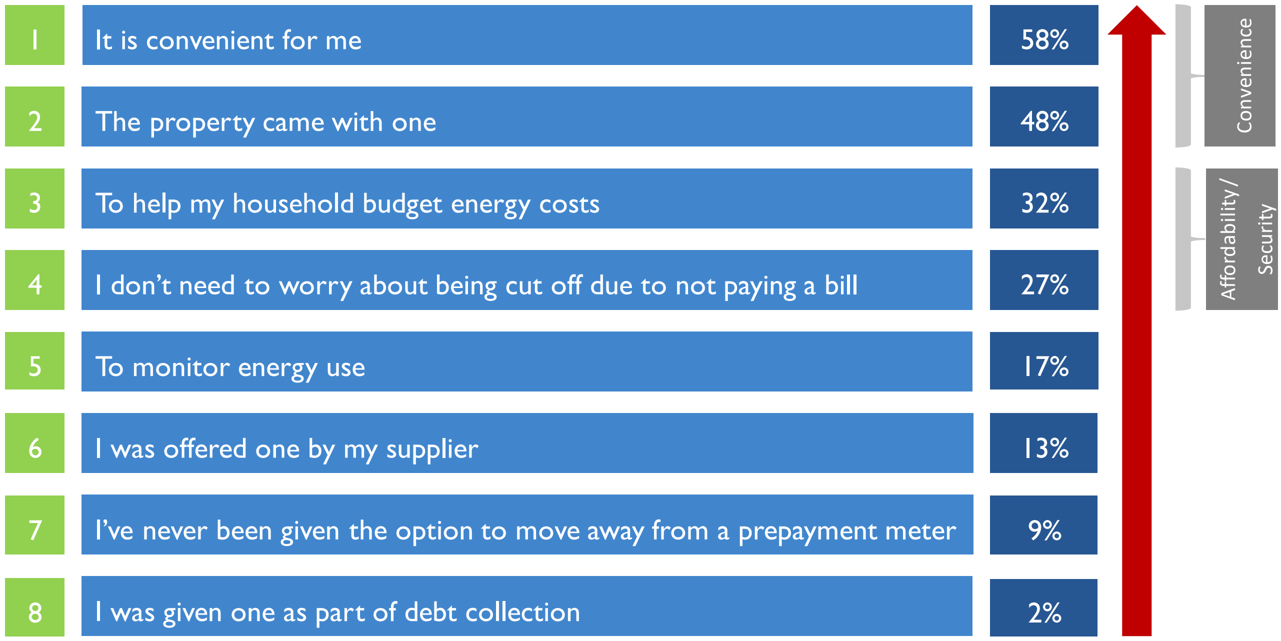


Note: Arrows denote whether the sub-group is significantly higher or lower than the average.
Source: CEPA and Impact analysis

This aligns with respondents' stated reasons for choosing to use a pre-payment meter. The figure below summarises the reasons why respondents said that they preferred to have a pre-payment meter.[35] The convenience of a pre-payment meter (including where individuals have moved into a property which already had a pre-payment meter) and affordability/security were the main reasons given.

[35] Consumers were allowed to provide more than one answer.

Figure 4.12: Why do you have a pre-payment meter?



Source: CEPA and Impact analysis

4.3.2. Affordability

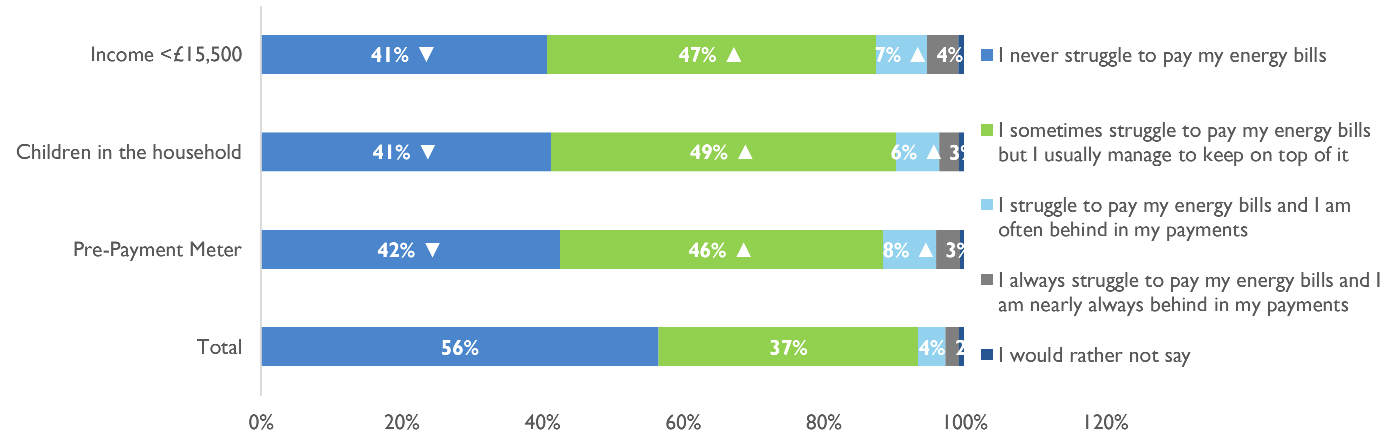
As shown in Figure 4.13 below, 6% of customers in NI stated that they 'struggle' or 'always struggle' to pay their energy bills. A further 37% say they 'sometimes struggle'. When this figure is compared across different groups of individuals, we find that the following households are more likely to struggle to pay their energy bills:

- those with earnings less than £15,500;
- those with a pre-payment meter; and
- households with children.

The same groups of consumers are also most likely to have gone without heating, lighting or energy 'often' or 'regularly' because they considered the energy costs were too high, as shown in Figure 4.14.

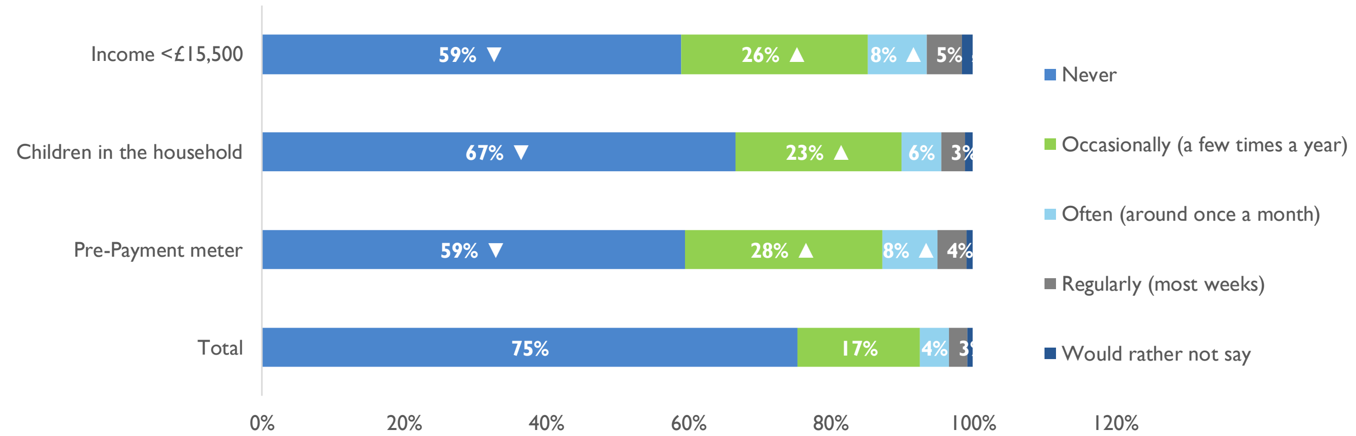
We do not find any statistical evidence to suggest that consumers aged 65+ or vulnerable consumers are more likely to struggle to pay their energy bills, or that they have gone without heating, lighting or energy more often than the general population. Full results across all demographic groups are presented in Appendix B.

Figure 4.13: Do NI consumers struggle to pay their bills? (by consumer group)



Note: Arrows denote whether the sub-group is significantly higher or lower than the average.
Source: CEPA and Impact analysis

Figure 4.14: Do NI consumers go without energy due to cost? (by consumer group)



Note: Arrows denote whether the sub-group is significantly higher or lower than the average.
Source: CEPA and Impact analysis

As suggested above, the payment method used to pay for energy appears to be an indicator of preferences relating to budgeting, affordability and security against disconnection. Consumers who pay for their energy via a pre-payment meter are more likely to struggle with their energy bills than the average household (11% versus 6%). This may explain why some customers choose a pre-payment rather than a credit meter.

In addition, consumers who have a pre-payment meter are significantly more likely to go without heating, lighting or energy because of the cost of energy relative to the average consumer (12% versus an average of 7%), which may reinforce our interpretation that pre-payment meters can be used for self-rationing for budgeting purposes. Conversely, consumers who pay for their energy via monthly direct debit are least likely to struggle to pay their energy bills (3%) and go without heating, lighting or energy because of the cost of energy (4%).

Of the 6% of consumers who do struggle to pay their bills, the majority do not have a repayment plan in place. Only 13% of consumers who struggle to pay their energy bills have a repayment plan in place. In fact, a large percentage of consumers who struggle to pay their energy bills did not know that they could set up a repayment plan (49%). This suggests that suppliers must do more to make sure their customers are aware of this option.

4.4. Possible areas to explore further

The box below presents possible areas which the UR may wish to explore further based on our analysis of fuel usage, spend and affordability.

Box 4: Fuel usage, spend and affordability – areas to explore further

- Considerations of why consumers use certain fuels and why they do and do not switch fuel is a complex issue with a number of factors at play and merits additional qualitative work. This analysis will be particularly important in the context of future heat decarbonisation requirements. The extent to which the UR continues to encourage a move to gas for heating is important to place in context of wider policy intentions.
- The UR may wish to explore the domestic consumer perception of the relative costs of energy in different regions (i.e. compared to GB and RoI), given the apparent disconnect between perceptions and reality.
- Use of oil in rural areas may have implications for fuel poverty in those areas going forward. It may be important to consider heating fuels for those who do not and are not expected to have access to the gas grid in the foreseeable future. This may be particularly important, given that our survey is in line with expectations that oil is a more expensive fuel for home heating.
- While the extent to which consumers say that they struggle to pay their bills and go without energy due to cost appears to be relatively low, particular care may need to be taken with these results given the potential associated stigma. Consumers may be under-reporting the challenges they face, and this may warrant follow-up targeted qualitative or quantitative analysis.
- The analysis of affordability identifies a number of consumer groups who are more likely to struggle to pay their bills. This may help the UR to target policies which are aimed at supporting such consumers under its Consumer Protection Programme.

Source: CEPA and Impact analysis

5. KNOWLEDGE AND PERCEPTIONS

This chapter examines consumers' levels of knowledge and perceptions in NI based on analysis of the following topics included in the survey:

- **Knowledge of energy suppliers and effects of competition**: we explore the levels of knowledge of energy suppliers that consumers have in NI.
- **Billing**: we examine the different billing methods used in NI and whether the information provided by energy suppliers is well understood.
- **Satisfaction and standards**: we assess consumers' awareness of minimum standards of customer service; levels of trust in their energy supplier; and satisfaction with their energy supplier.
- **Vulnerability**: we examine consumers' awareness of support services for vulnerable consumers and levels of satisfaction for consumers who have received support services.

Box 5: Knowledge and perceptions – key facts

Knowledge of energy suppliers and effects of competition

- On the whole, the newest suppliers are least known, and the oldest suppliers are the most known amongst consumers. For example, Power NI are known by 95% of consumers but only 30% of consumers have heard of Click Energy.
- The majority of consumers consider that competition in the retail market has led to no changes with regards to supplier choice (60%), supplier responsiveness (58%), the number of tariffs available (51%) and the quality of service provided (64%).
- 46% of consumers consider that competition has led to the cost of electricity and gas increasing.

Billing

- 42% of consumers receive their bill via email or online, 35% receive their bill in the post, and 8% receive their bill through a smart application.
- 59% of consumers who have switched electricity suppliers in the last three years choose to access their bill via email, online or a smart application compared to only 43% of those who have not switched in the last three years (sticky consumers).
- 46% of consumers who read supplier correspondence say that they did not understand all or most of the information provided.

Standards, trust and satisfaction

- 40% of consumers are not aware that energy suppliers must meet certain minimum standards of customer service.

- Significantly more consumers trust their supplier than do not trust their supplier (43% versus 11% with the remainder scoring level of trust moderately).
- 52% of electricity consumers and 43% of gas consumers are satisfied with the quality of service they receive.

Vulnerability

- 53% of consumers are unaware that special services are available to support those who are vulnerable.
- For those consumers who are aware of special services, only 45% know about the type of services that are available (or 20% of total consumers).
- 13% of consumers have used special services made available by energy companies (both suppliers and network companies) in NI.
- 55% of consumers who are on the critical care register[36] are satisfied with the quality of service provided (33 out of 60 consumers in the sample who are on the critical care register).

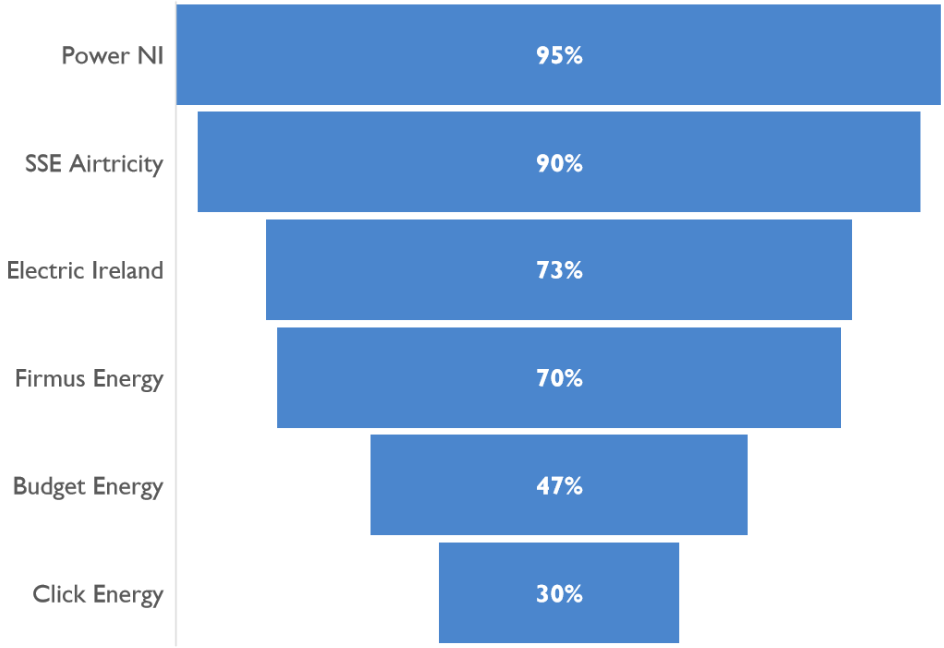
Source: CEPA and Impact analysis

5.1. Knowledge of energy suppliers

We asked consumers if they had heard of the current energy suppliers available in the NI market. Figure 5.1 below presents the percentage of consumers who have heard of the six energy suppliers in NI.

[36] The Critical Care Register is for customers who rely on a supply of electricity to operate life supporting and sustainable medical treatment.

Figure 5.1: Heard of NI energy suppliers



Source: CEPA and Impact analysis

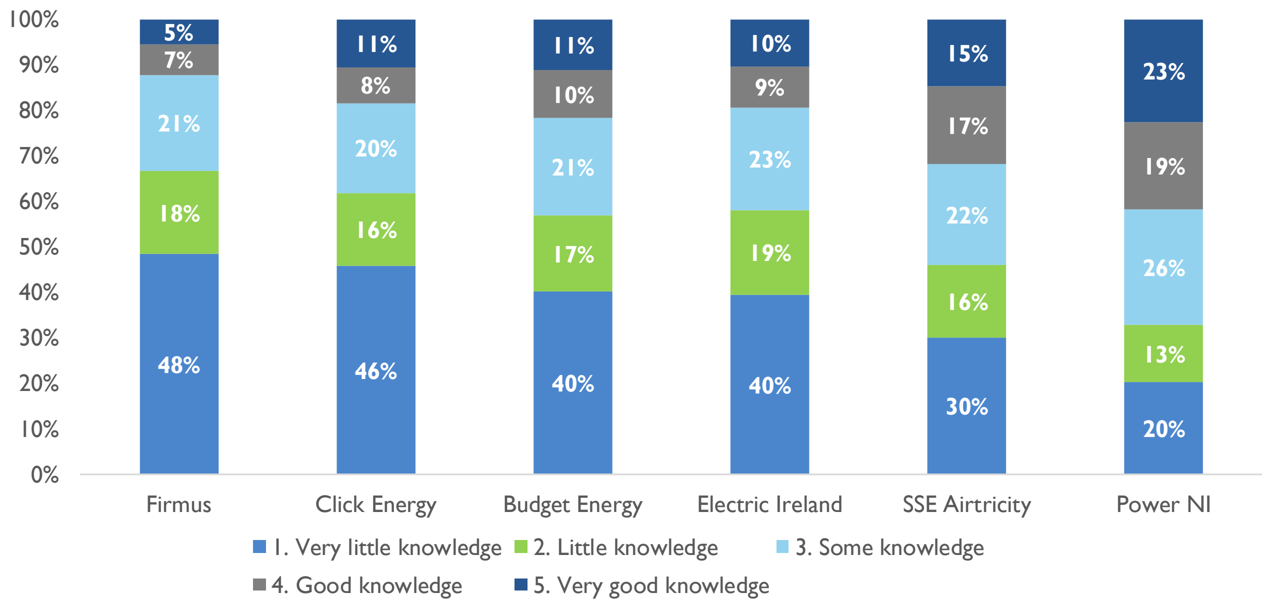
On the whole, the newest suppliers are the least known in the market and the oldest suppliers in the market are the most known amongst consumers. Power NI, who were the monopoly supplier before the introduction of competition, are known by 95% of consumers. In contrast, only 30% of consumers have heard of Click Energy, which entered the market in 2015.

The exception to the rule is Electric Ireland, who are known by 73% of consumers, yet only started supplying electricity to customers in 2015. This may reflect the fact that Electric Ireland has grown quickly since 2015 and now serves 80,000 households.[37]

For each supplier, we asked those consumers who had heard of them how much knowledge they had of them, ranging from very little knowledge to very good knowledge.

[37] Source: https://www.which.co.uk/reviews/energy-companies/article/northern-ireland-electricity-and-gas/electric-ireland

Figure 5.2: Knowledge of energy suppliers in NI (of those consumers who had heard of the relevant supplier)[38]



Source: CEPA and Impact analysis

Consumers have the most knowledge about Power NI, the sole electricity supplier before the introduction of competition. Despite 70% of people having heard of them, consumers seem to have least knowledge of Firmus Energy (66% of consumers who had heard of Firmus Energy had very little or little knowledge of them), though have been operating in the NI energy market longer than other suppliers, such as Budget Ireland and Electric Ireland. This may be partly due to Firmus' position in the market as a gas-only supplier. As identified previously, only around 25% of consumers said they use gas for home heating and even where consumers use gas, it may not be possible for Firmus Energy to act as their supplier.

As we may expect, consumers who have not switched electricity suppliers in the last 3 years have significantly less knowledge of suppliers than those who have. For example, 72% of consumers who have not switched electricity suppliers in the last three years have very little/little knowledge of Electric Ireland compared with only 42% of consumers who have.

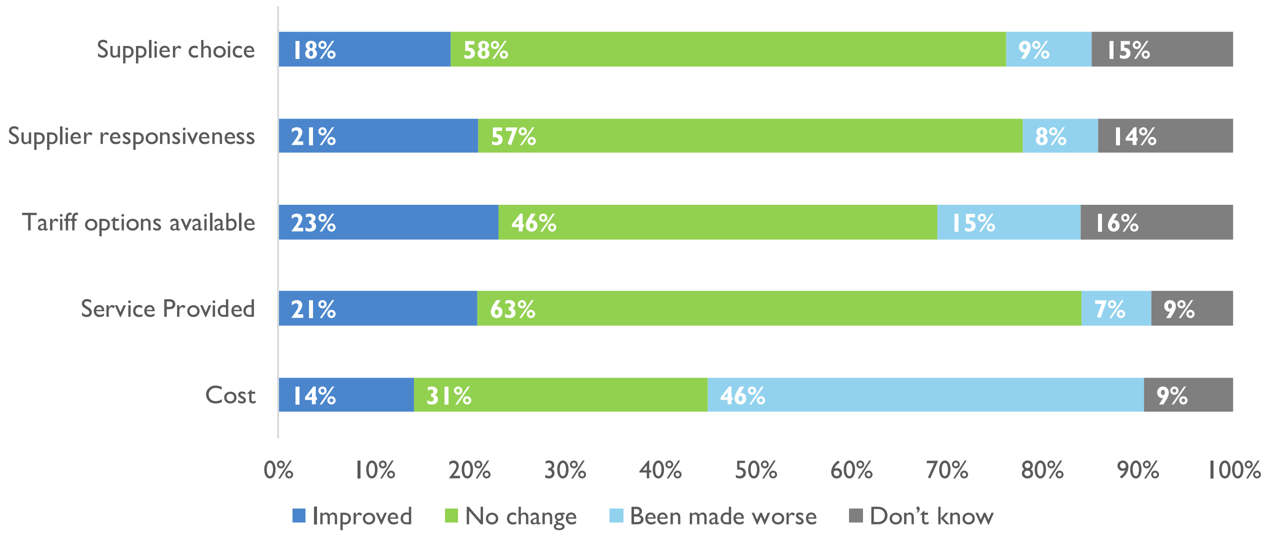
Older consumers (45+ years old) are less likely to have good knowledge of suppliers than younger consumers (<44 years old), which is in line with the fact that older consumers are also less likely have switched electricity suppliers in the last three years (see Figure 3.5). For example, 79% of consumers aged 65+ have very little/little knowledge of Budget Energy, compared with only 57% for the general population.

[38] It is not possible to determine statistical significance between different suppliers because a separate set of results are obtained for each supplier.

5.1.1. Perceptions of introduction of supplier competition

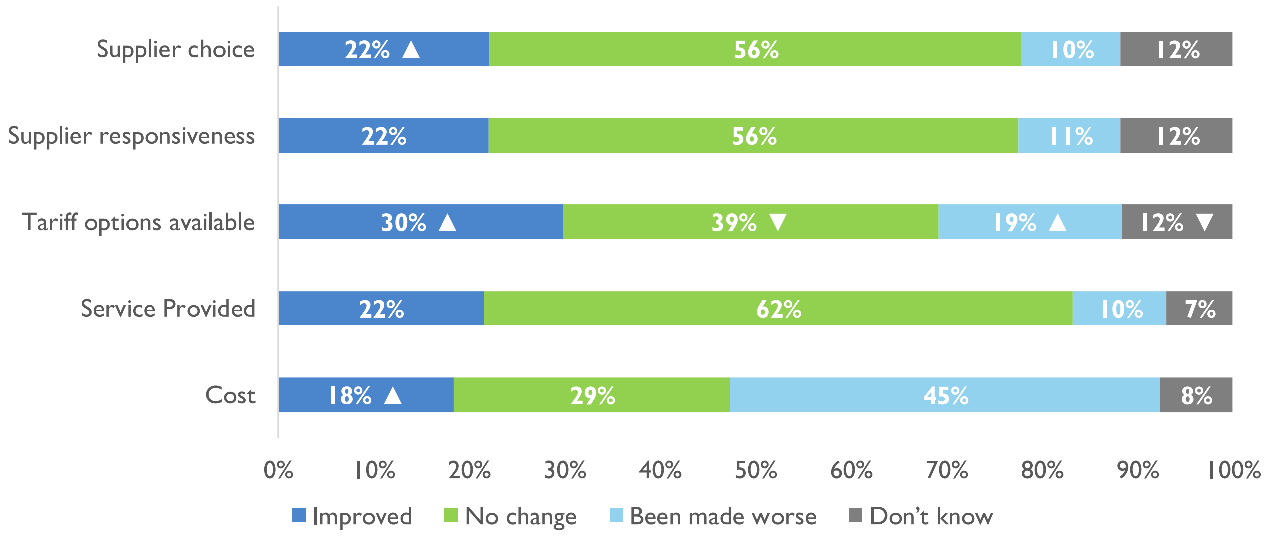
Consumers' perceptions on what has changed since the introduction of domestic supplier competition in NI are summarised in Figure 5.3 to Figure 5.5 below.

Figure 5.3: What has changed since the introduction of competition into the energy market? (total)



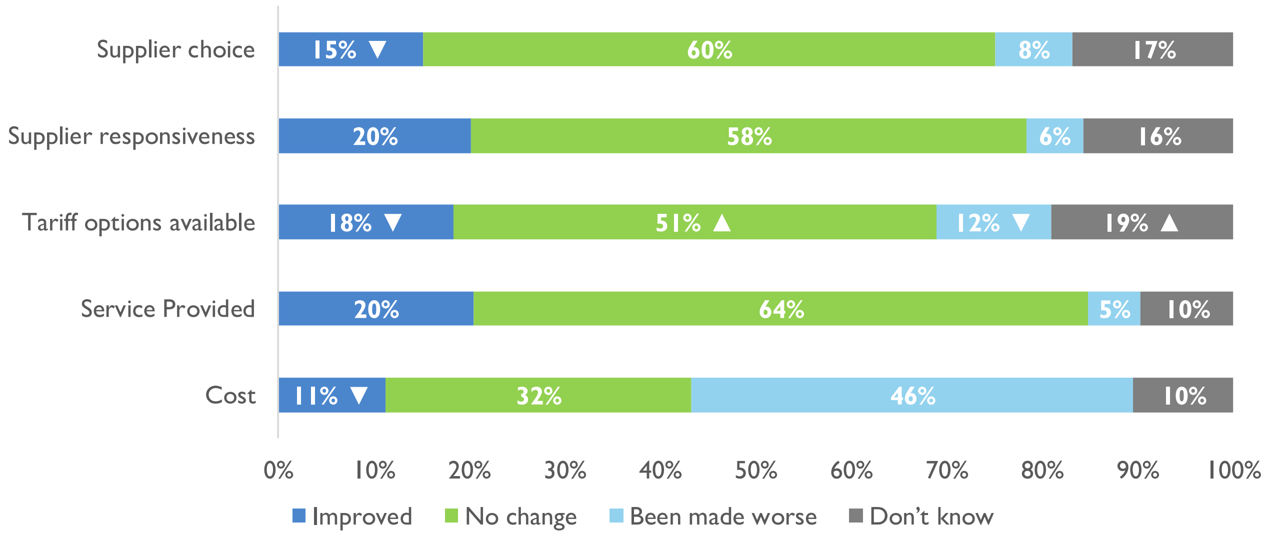
Source: CEPA and Impact analysis

Figure 5.4: What has changed since the introduction of competition into the energy market? (consumers who have switched electricity suppliers in the last three years)



Note: Arrows denote whether the sub-group is significantly higher or lower than the average.
Source: CEPA and Impact analysis

Figure 5.5: What has changed since the introduction of competition into the energy market? (consumers who have not switched electricity suppliers in the last three years)



Note: Arrows denote whether the sub-group is significantly higher or lower than the average.
Source: CEPA and Impact analysis

While the reasons for the introduction of competition may have included placing downward pressure on cost and improving the service provided, as well as consumer choice, it is interesting to find that the majority of consumers consider that competition in the market has led to no changes in relation to these characteristics of the market. In fact, almost half of consumers (46%) consider that competition has led to the cost of electricity and gas increasing. It is important to acknowledge, however, that consumer perceptions are not always in line with reality. Cost impacts are particularly difficult to assess given the multitude of other factors that will also cause changes in energy costs (e.g. wholesale energy price changes).

Consumers who have switched within the last three years appear to have a more positive outlook on the benefits of competition. While the majority still consider that competition has resulted in no change or made things worse, a larger percentage believe that there have been improvements, particularly in the tariff options available (30%) when compared to those who have not switched electricity supplier in the last three years.

5.2. Billing

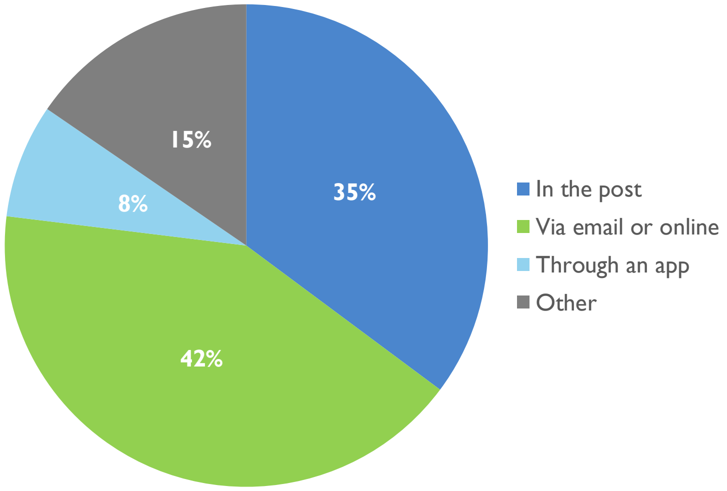
Consumers were asked two specific questions with regards to their energy bill:

- How do you receive your energy bill?
- Do you read and understand the information provided in your energy bill?

5.2.1. Billing methods

We asked consumers how they received their energy bill. In recent years, some consumers have moved away from receiving bills in the post and towards paperless billing (e.g. email, online or through a smart application). At a total level, we find that the most popular choice of billing method amongst NI consumers is via email or online (42%), with conventional paper billing coming in second place (35%).

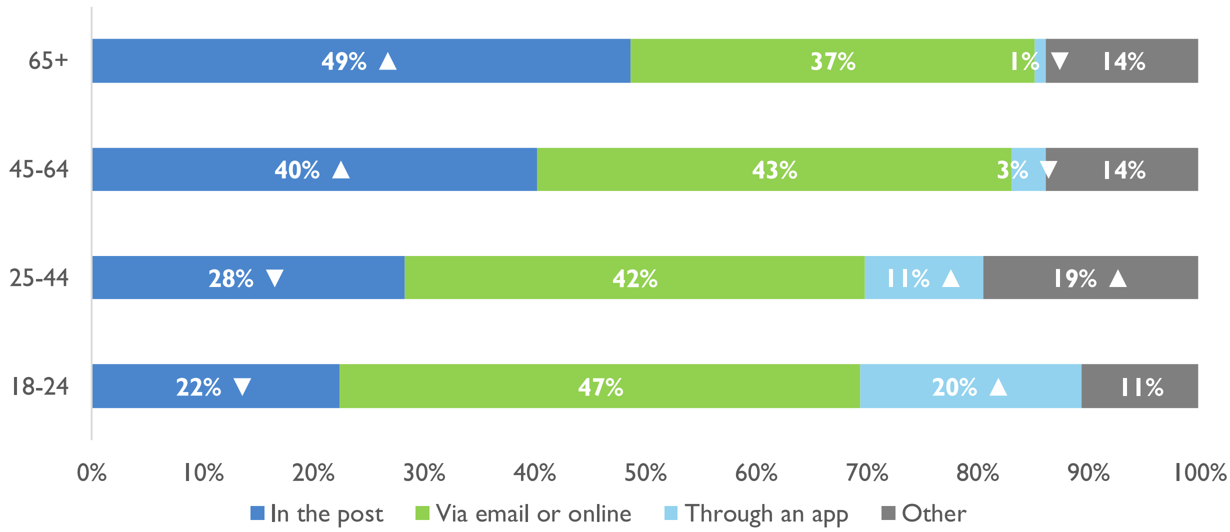
Figure 5.6: NI billing methods (total)



Source: CEPA and Impact analysis

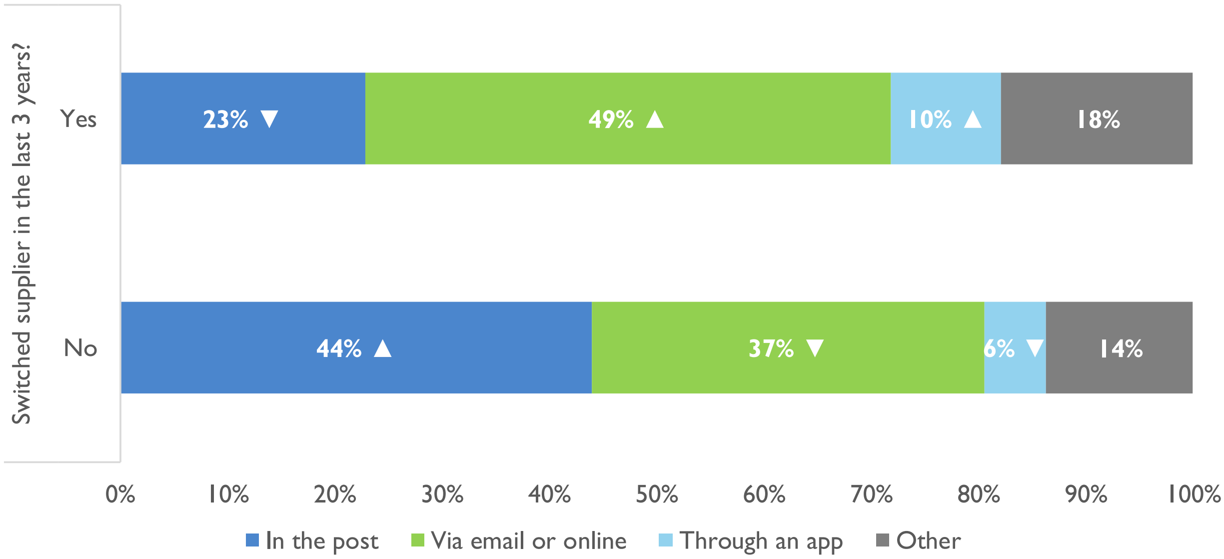
We also examined billing methods across key consumer groups. Namely, by different age groups and by switching profile (i.e. switched in the last three years vs. not switched in the last three years).

Figure 5.7: NI billing methods (by age groups)



Note: Arrows denote whether the sub-group is significantly higher or lower than the average.
Source: CEPA and Impact analysis

Figure 5.8: NI billing methods (by switching profile)



Note: Arrows denote whether the sub-group is significantly higher or lower than the average.
Source: CEPA and Impact analysis

Consumers who have switched suppliers in the last three years are significantly more likely to choose paperless billing than those who have not. 59% of consumers who have switched supplier in the last three years choose to access their bill via email, online or a smart application, compared to only 43% of sticky consumers.

As we may have expected, younger consumers (aged 18-24) are significantly more likely than the average consumer to access their bill through non-conventional billing methods such as a smart application (20% versus 8%). Similarly, consumers aged over 65 years old are significantly more likely than the average consumer to receive their bill in the post (49% versus 35%).

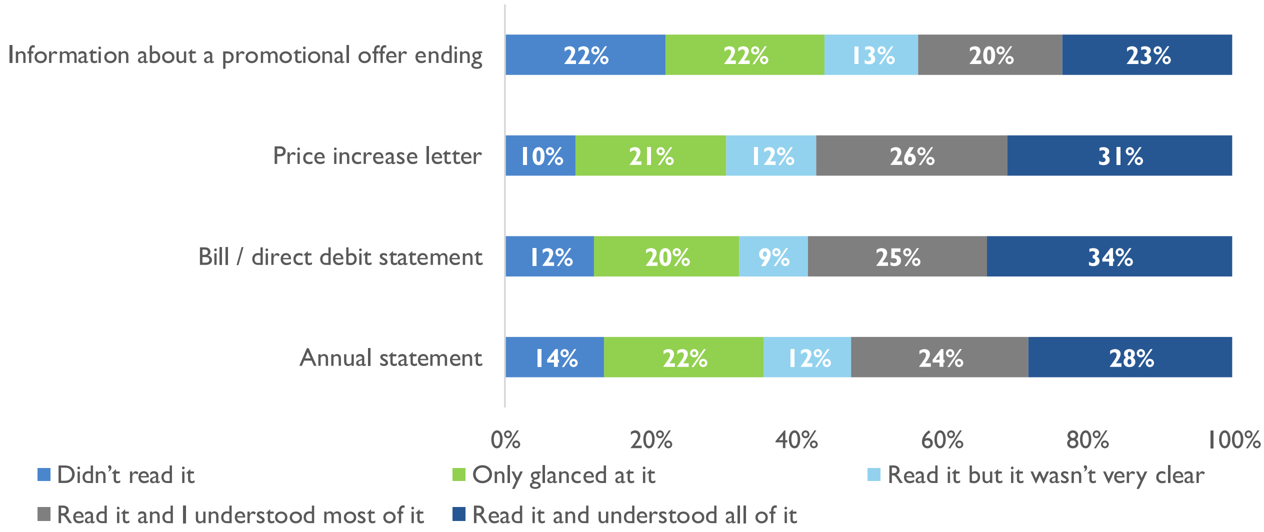
There appears to be no significant differences in the choice of billing methods between vulnerable consumers and the average consumer.[39]

5.2.2. Understanding of energy bill and other communications

Consumers were also asked whether they read correspondence sent to them from their supplier regarding their energy bill, and how much of this information they understood, if they read the correspondence.

[39] More detailed results are presented in Appendix B.

Figure 5.9: Did you read and understand the information provided by your supplier? (by communication type[40])



Source: CEPA and Impact analysis

Depending on the type of communication, between 31% and 44% either do not read the information sent to them or only glance at it. The majority of consumers who do read the correspondence sent by their supplier understand most or all of the information provided (between 43% and 59% of all consumers).

However, relative to other forms of written communication, consumers appear to pay less attention to information about a promotional offer ending, and they are slightly less likely to understand this information when they do read it. A lack of engagement at the end of a promotional offer could increase the likelihood of consumers becoming disengaged from the market altogether. These results may therefore suggest that a focus on correspondence regarding information about a promotional offer ending could provide an opportunity to enhance continued engagement in the market.

Moving forward, the UR may wish to probe into these findings further to better understand how consumers engage with, and act on, correspondence they receive from their energy supplier.[41]

5.3. Standards, trust and satisfaction

In this section, we examine three different issues regarding standards, trust and satisfaction:

- Are consumers aware of minimum standards of customer service that are in place to protect them in their relationship and dealings with energy suppliers?
- Do consumers trust their energy supplier to provide clear information and a fair price?

[40] It is not possible to determine statistical significance between different forms of communication because a separate set of results are obtained for each communication type.

[41] We did not find any significant differences between different consumer demographics. Full results can be found in Appendix B.

- How satisfied are consumers with the overall service they receive from their energy supplier?

5.3.1. Awareness of minimum standards of customer service

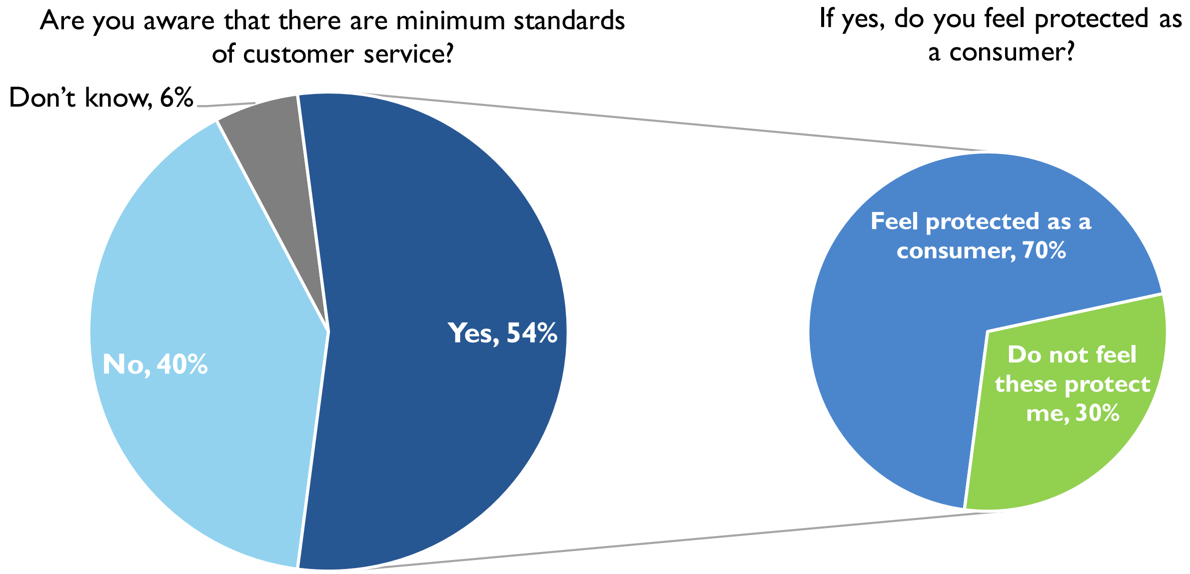
All energy suppliers operating in the NI retail market must comply with Energy Supplier Codes of Practice minimum standards, which cover four key areas:[42, 43]

- Code of Practice minimum standards on Payment of Bills.
- Code of Practice minimum standards on Provision of Services for persons who are of Pensionable Age or Disabled or Chronically Sick.
- Code of Practice minimum standards on Complaints Handling Procedure.
- Code of Practice minimum standards on Services for Pre-payment Meter Customers.

These minimum standards ensure customers, and in particular vulnerable customers, are protected in their relationship and dealings with energy suppliers.

We asked consumers whether they are aware of these minimum standards of customer service. Our findings are presented in Figure 5.10 below.

Figure 5.10: Consumer awareness of minimum standards of customer service



Source: CEPA and Impact analysis

[42] Source: https://www.uregni.gov.uk/consumer-protection

[43] The UR also has additional mandatory codes of practice in place, which suppliers must comply fully with, which are: (i) Code of practice on bills and statements; (ii) Code of practice on the efficient use of electricity/gas; and (iii) Marketing code of practice.

The majority of NI consumers are aware that energy suppliers have to meet certain minimum standards of customer service (54%).[44] Of those consumers who are aware of the minimum standards in place, 70% consider themselves to be protected as a result.

However, a significant proportion of consumers remain unaware that energy suppliers must meet certain minimum standards of customer service (40%). The UR may wish to explore how suppliers can better communicate the existence of minimum standards to their customers.

Vulnerable consumers do not appear to be more or less aware of minimum standards of customer service than the average consumer.

Table 5.1: Awareness of minimum standards of customer service (vulnerable consumers vs. total population)

Awareness of minimum standards of customer service	Total	Vulnerable consumers (Medium/High)
Yes, and feel protected as a consumer	38%	38%
Yes, but do not feel these protect me	16%	18%
No	40%	39%
Don't know	6%	5%

Source: CEPA and Impact analysis

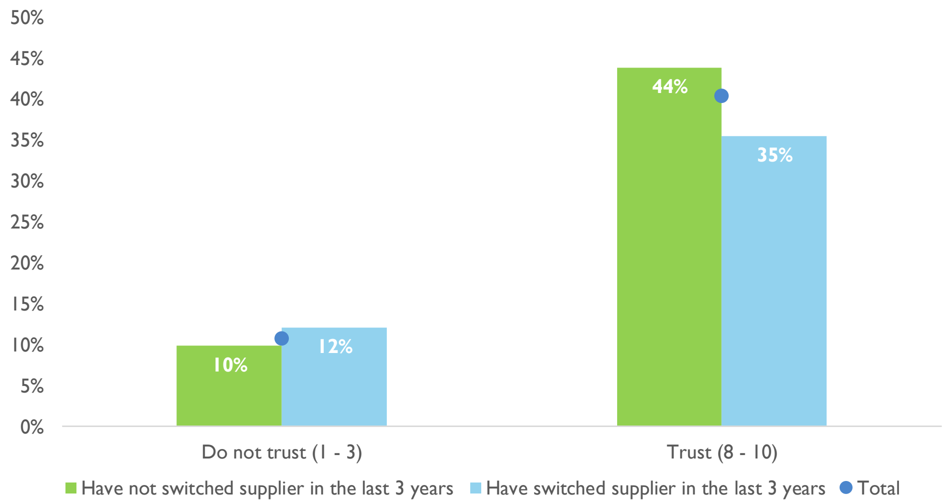
5.3.2. Energy supplier trust

We also asked survey respondents whether they trusted their energy supplier to provide clear information and a fair price, using a scale of 1-10, where 1 is 'do not trust my supplier at all' and 10 is 'completely trust my supplier'. The results are presented in Figure 5.11 below.[45]

[44] There are no significant differences in responses between different consumer sub-groups.

[45] To analyse the results, we defined 1-3 responses as 'do not trust their supplier' and 8-10 responses as 'trust their supplier'. Scores of 4-7 were not counted in either category.

Figure 5.11: Consumer trust in energy suppliers (by switching profile)



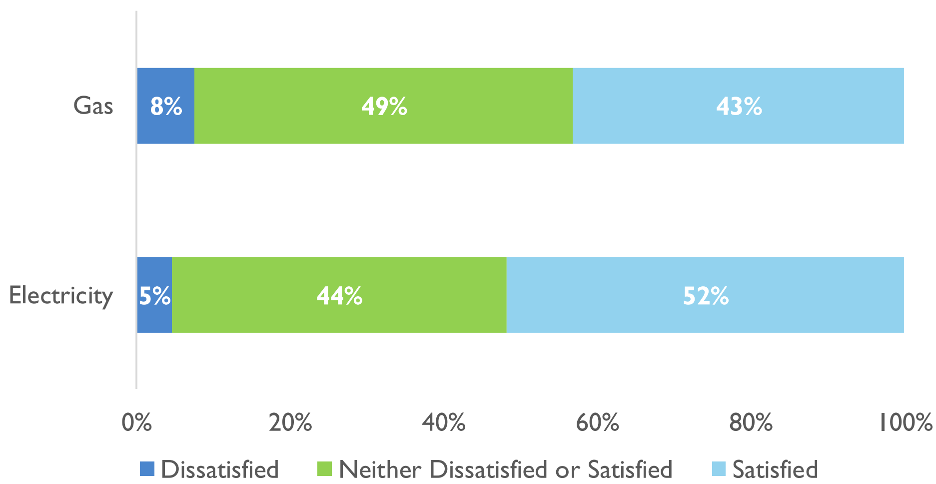
Note: Arrows denote whether the sub-group is significantly higher or lower than the average.
Source: CEPA and Impact analysis

Overall, significantly more consumers trust their supplier than do not trust their supplier (43% versus 11%) with the remainder not expressing a strong opinion (i.e. scoring between 4 and 7 in relation to trust). Interestingly, consumers who have switched their electricity supplier in the last three years are less likely to trust their supplier than those who have not switched in the last three years. The greater level of trust of those who have not recently switched suppliers may be one of the reasons why consumers are less motivated to switch.

5.3.3. Supplier satisfaction

To explore the levels of consumer satisfaction with energy suppliers in NI, we asked consumers how satisfied they are with the overall service they receive from their energy supplier. The findings are summarised in Figure 5.12 below, separately for electricity and gas suppliers.

Figure 5.12: Customer satisfaction with current energy supplier (by type of energy supplier)



Source: CEPA and Impact analysis

Overall, the level of satisfaction with energy suppliers in NI appears to be high. The level of satisfaction is slightly higher for electricity suppliers than gas suppliers:

- 52% of electricity consumers, and 43% of gas consumers, are satisfied with the quality of service they receive from their supplier.
- Only 5% of electricity consumers, and 8% of gas consumers, are dissatisfied with their supplier.

Table 5.2 below shows how the level of supplier satisfaction differs across different demographic groups.

Table 5.2: Percentage of consumers who are satisfied with their current energy supplier

Satisfied with their energy supplier	Total	Age Group		Children in household?	
		18 – 24	65+	No	Yes
Electricity	52%	34%▼	67%▲	56%▲	43%▼
Gas	43%	28%	65%▲	47%	35%

Note: Arrows denote whether the sub-group is significantly higher or lower than the average.
Source: CEPA and Impact analysis

The level of supplier satisfaction is significantly greater for consumers aged over 65 than younger consumers (67% versus 34% for electricity, and 65% versus 28% for gas). This may help to explain why significantly fewer older consumers have switched suppliers since the introduction of competition into the retail energy market in NI (see Figure 3.5).

Households with children are significantly less likely to be satisfied with their energy supplier than households without children (56% versus 43% for electricity, and 47% versus 35% for gas).

5.4. Vulnerability

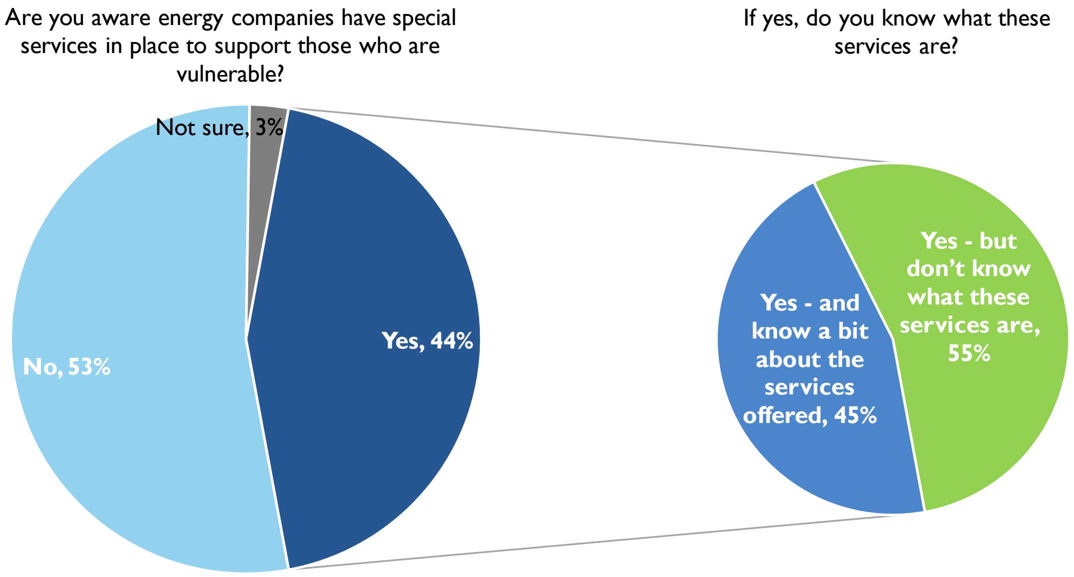
Energy companies have a number of special services in place to support vulnerable customers. These include:

- **Critical care register**: for customers who rely on a supply of electricity to operate life supporting and sustainable medical treatment.
- **Customer care register**: consumers on the register are prioritised during any service problems. They can also access additional free services.
- **Large print bill**: consumers with visual problems can request their energy bill in large print.
- **Password scheme**: consumers can register a password and the supplier will use it if they call.

As discussed in Section 2.6.1, we consider consumers who fall into the definition of 'medium' or 'high' vulnerability as vulnerable consumers, which is in line with other work conducted by the UR.

Figure 5.13 below presents the level of consumer awareness of the special services energy companies have in place to support those who are vulnerable.

Figure 5.13: Consumer awareness of support services in place to support vulnerable consumers



Source: CEPA and Impact analysis

We find that 53% of consumers are unaware that energy companies have special services available to support those who are vulnerable, while 44% of consumers are aware. For those consumers who are aware of special services, only 45% know about the type of services that are available (or 20% of the total population).

We find that vulnerable consumers do not appear to be any more likely to be aware of the special services available than non-vulnerable consumers. Given that general awareness is low, this may suggest that energy companies (and potentially UR) could be doing more to actively engage with consumers who can benefit from the special services on offer.

Table 5.3 below presents the percentage of consumers who have used support services offered by energy companies.

Table 5.3: Have you used any support services offered by energy companies?

Have you used any support services offered by energy companies?	Total	High vulnerability	Medium vulnerability	Low vulnerability
Signed up to the Critical Care Register	4%	11% ▲	3%	2%
Signed up to the Customer Care Register	5%	8%	5%	4%
Requested a large print bill	5%	6%	4%	3%
Included in the Password Scheme	2%	4% ▲	2%	1%
Other (specify)	0%	1%	0%	1%
None	87%	74% ▼	90%	94%

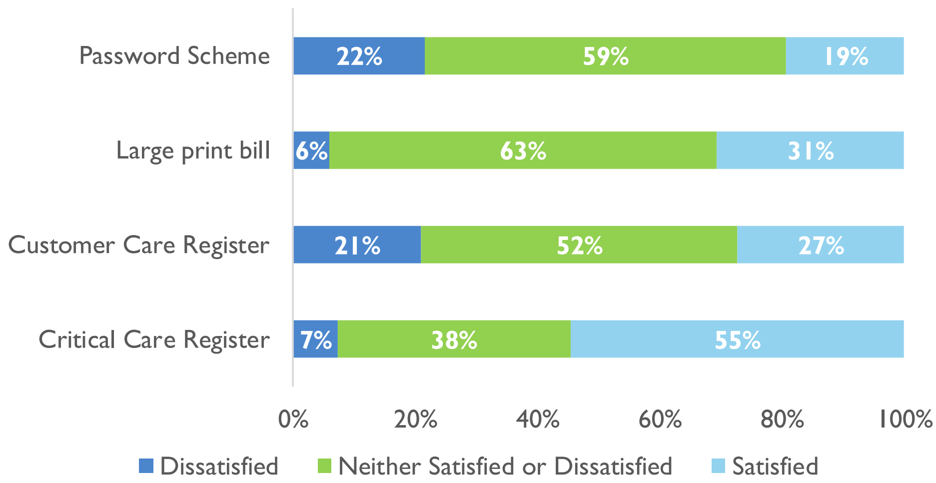
Note: Arrows denote whether the sub-group is significantly higher or lower than the average.
Source: CEPA and Impact analysis

We find that 87% of consumers have never used any of the support services provided by energy companies.

As may be expected, high priority vulnerable customers (e.g. chronic/serious illness) are most likely to have used support services. But even the uptake of support services for high priority vulnerable customers appears low (only 26% of high priority vulnerable customers have used support services available to them). Therefore, the UR may wish to investigate further to understand whether those who are entitled to support services are aware of their availability.

Figure 5.14 below presents the level of satisfaction with the support services received for those consumers who have used special services.

Figure 5.14: How satisfied were you with the support service provided by your energy supplier?



Source: CEPA and Impact analysis

From those consumers who are on the critical care register, 55% are satisfied with the quality of service provided. In contrast, the majority of consumers who are on the customer care register, receive large print bills or are on the password scheme are neither satisfied or dissatisfied with the quality of service provided by their supplier. A sizeable minority (22% and 21%) are unhappy with the 'Password Scheme' and 'Customer Care Register' respectively.

However, care should be taken with interpretation of these results. It is important to recognise that only 183 survey respondents have ever used special services, so the sample size is limited and we do not find statistical significance of these results. Nevertheless, the UR may wish to consider further why even a small number of consumers are dissatisfied with the services available. We propose that the UR probe further into these results to better understand how satisfied consumers are with the quality of service provided. This may be especially the case for the 'Password Scheme' and 'Customer Care Register' where a sizeable minority of consumers appear unhappy with the service.

5.5. Possible areas to explore further

The box below presents possible areas which the UR may wish to explore further based on our analysis of consumer perceptions.

Box 6: Knowledge and perceptions – areas to explore further

- Knowledge of some suppliers is relatively low. Raising awareness of tariffs may also help to raise awareness of different suppliers and the options available in the market. This may, in turn, help to promote the benefits that competition has brought for consumers.
- Supplier satisfaction is relatively high, but we are not able to measure differences in satisfaction across the market. In other markets, greater emphasis is being placed on the ability to compare supplier quality, as well as price. For example, the CCNI could publish regular 'league tables' of supplier satisfaction to help inform consumer choice.
- We identify some variance in the extent to which consumers read and understand different forms of communication. A worrying percentage of consumers do not read supplier communications at all (10%-22%, depending on type of information). In addition, some potentially important communications (e.g. notification of promotional offers ending) appear not to be well read or understood. In GB, Ofgem has invested resource into testing and trialling different communication approaches, drawing on behavioural insights. They have tasked suppliers with doing the same. The UR may wish to consider whether focusing some effort on developing effective communications in certain areas could help it to achieve its policy goals. There is a question about whether bills through the post are the most effective way to engage with certain consumer types and the UR may wish to look into this through further research.
- Supplier trust is relatively high, particularly for those customers who have not switched in the last three years. Trust itself should be seen as a positive outcome of the market. However, the UR may want to explore what is driving this further through qualitative follow-up work. To the extent that trust is developed incorrectly or exploited (e.g. through mis-selling), this could drive poor outcomes for consumers in other areas.
- 40% of consumers do not know that suppliers need to meet certain standards of customer service, and 30% of those who do know, do not believe this protects them. This may suggest that the UR (perhaps in part by encouraging suppliers) may need to do more to raise awareness of these standards.
- Special services are available but satisfaction with these services varies. Perhaps more importantly, many vulnerable consumers, at whom the initiatives are targeted, are not aware of, or do not use, the services they could receive. For example, we find that only 26% of high-priority vulnerable customers have used support services available to them.

Source: CEPA and Impact analysis

6. WIDER ENERGY SERVICES

This chapter examines consumer uptake and preferences based on analysis of the following topics included in the survey:

- **Energy efficiency**: we consider the take-up of energy efficiency measures in NI in the past three years.
- **Consumer appetite for wider energy initiatives**: we evaluate consumer appetite for a selection of hypothetical initiatives.

Box 7: Other services – key facts

Energy efficiency

- The majority of consumers have not put energy efficiency measures in place in the last three years (59%). However, many consumers say that this is because they already have measures in place in their home.

Consumer appetite for wider energy initiatives

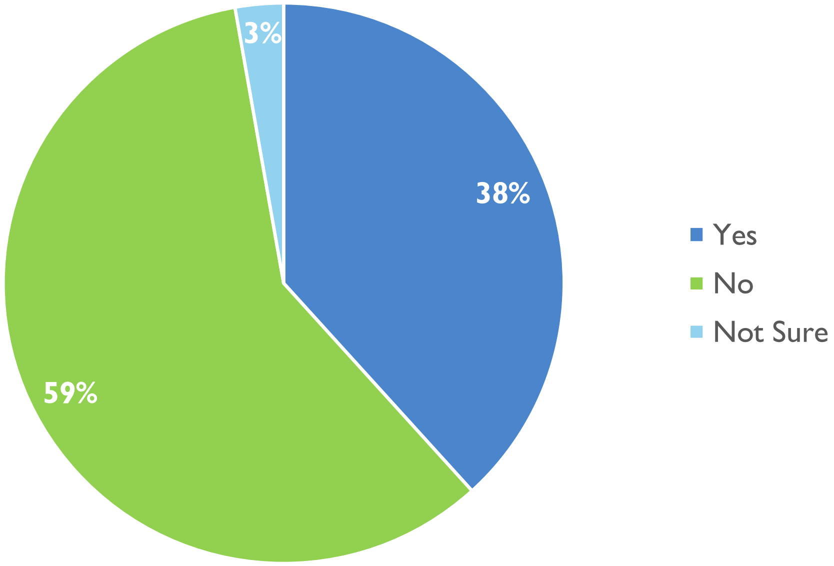
- The initiative that individuals would most like to see from their supplier is protection of the environment.
- However, this is not the most popular initiative within any one age group. Supporting customers over the age of 60 is popular with those customers aged over 44, while younger customers consider supporting those who are less able to pay their bills and vulnerable consumers more generally to be the most important.
- The average willingness to pay for the services that individuals selected was £1.69 per month. However, 40% of respondents were not willing to pay anything additional. 16% were willing to pay £5 or more per month extra.

Source: CEPA and Impact analysis

6.1. Energy Efficiency

We asked consumers whether they had installed any energy efficiency measures in their home. Figure 6.1 below presents the percentage of respondents who have or have not put any energy efficiency measures (not including minor additions such as energy saving lightbulbs) in place in their home in the last three years.

Figure 6.1: Have you put any energy efficiency measures in place in your home in the last three years?



Source: CEPA and Impact analysis

The majority of consumers have not installed any energy efficiency measures in their home in the last three years (59%). We asked these consumers to provide the main reasons why they had not installed any measures in the last three years.

Figure 6.2: Reasons for not installing energy efficiency measures in the last three years (respondents could select more than one option)

1	These were already in the home	36%
2	Installed them more than 3 years ago	31%
3	Cannot afford the initial outlay	14%
4	I rent my property/have no control over structural changes	14%
5	Don't think they are needed	12%
6	Lack of information	10%
7	It would cause too much disruption	6%

Source: CEPA and Impact analysis

The most common reason for not putting energy efficiency measures in place was that they were already present (either as they were already in place or because the individual added them more than three years ago).[46]

Other individuals had not installed them for cost (14%), information (10%), or disruption reasons (6%). In addition, 12% considered that they were not needed.

We find some significant differences in responses between consumer groups as presented below:

- A higher proportion of younger consumers (19% of <44 years old), households with children (22%), and lower income households (22% of households with incomes of up to £15,499) claim they cannot afford the initial outlay of energy efficiency measures. These findings are interesting given that consumers with an annual household income of less than £20,000 can apply for energy efficiency measures under domestic heating grants and schemes.[47]
- A higher proportion of older consumers (53% of those aged 65+) installed energy efficiency measures in their home more than three years ago.
- A higher proportion of younger consumers (19% of <44 years old) and low-income households (24% of households with incomes of up to £15,499) claim they are unable to install energy efficiency measures because they rent their home or are otherwise unable to make structural changes to their property.

In combination, these results suggest that where it is relatively easy and affordable to do so, a number of consumers have installed energy efficiency measures in the past. If there are policy intentions to increase the uptake of energy efficiency measures, it may be important to overcome the obstacles of the initial cost outlay, and the alignment of incentives in the rental market. It may also be important to increase awareness of domestic heating grants and schemes among low-income consumers.

6.2. CONSUMER APPETITE FOR WIDER ENERGY INITIATIVES

We also wanted to explore the level of consumer appetite for a number of hypothetical, wider energy initiatives. Consumers were asked to select the three initiatives they would want to see most from their supplier out of the following list of options:

- Investing in projects to protect the environment
- Supporting customers over the age of 60
- Supporting other vulnerable customers (not only those over the age of 60)
- Supporting customers who are less able to pay their bills

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[46] Note that as respondents could select more than one option, these percentages are not cumulative.

[47] For example, the 'Affordable Warmth Scheme': https://touch.nihe.gov.uk/index/benefits/affordable_warmth_scheme.htm

- Improving reliability to reduce risk of supply loss
- Connecting those not already on mains gas
- Improving customer service

Consumers were asked to provide their first, second and third choice of wider energy initiatives amongst the options listed above. The tables below show how consumers responded, with a rank of 1 indicating the initiative was the most popular among consumers and a rank of 7 indicating it was the least popular (for that choice).

Table 6.1: Consumer first choice initiative (% and ranking)[48]

Initiative	Total	%
Investing in projects to protect the environment	1	18.7%
Supporting other vulnerable customers (not only those over the age of 60)	2	18.7%
Supporting customers over the age of 60	3	18.1%
Supporting customers who are less able to pay their bills	4	16.9%
Improving customer service	5	10.0%
Connecting those not already on mains gas	6	9.7%
Improving reliability to reduce risk of supply loss	7	7.9%

Source: CEPA and Impact analysis

Table 6.2: Consumer second choice initiative (% and ranking)[47]

Initiative	Total	%
Supporting other vulnerable customers (not only those over the age of 60)	1	20.5%
Supporting customers who are less able to pay their bills	2	15.6%
Supporting customers over the age of 60	3	14.4%
Nothing else	4	13.3%
Investing in projects to protect the environment	5	13.0%
Improving reliability to reduce risk of supply loss	6	9.2%
Improving customer service	7	8.5%
Connecting those not already on mains gas	8	5.6%

Source: CEPA and Impact analysis

Table 6.3: Consumer third choice initiative (% and ranking) [47]

Initiative	Total	%
Supporting customers who are less able to pay their bills	1	16.3%
Supporting other vulnerable customers (not only those over the age of 60)	2	15.2%
Investing in projects to protect the environment	3	13.9%

[48] 'Nothing else' does not feature in this selection.

Initiative	Total	%
Supporting customers over the age of 60	4	13.4%
Nothing else	5	12.9%
Improving customer service	6	11.3%
Improving reliability to reduce risk of supply loss	7	9.5%
Connecting those not already on mains gas	8	7.5%

Source: CEPA and Impact analysis

At a total level, we found minimal difference in responses between the top three choices among consumers, each of which was selected as the most desired initiative by around 18 – 19% of consumers. The following three initiatives were the first-choice initiative most frequently:

- Investing in projects to protect the environment
- Supporting other vulnerable customers (not only those over the age of 60)
- Supporting customers over the age of 60

Interestingly, very few consumers (7.9%) selected "improving reliability to reduce risk of supply loss" as their most important initiative. This may reflect the fact that consumers do not face regular issues with their supply, and consider that they should generally receive an uninterrupted supply without needing to pay additional cost.

Overall, supporting vulnerable customers (not only those over the age of 60) is a popular choice amongst consumers and appears in the top two most popular initiatives whether selected as the consumer's first, second or third most important initiative.

It is also interesting to examine differences in responses between consumers of different age groups. Table 6.4 below shows the most to least popular 'first choice' initiatives for different age groups.

Table 6.4: Consumer ranking of different initiatives[49]

Initiative	Total	18-24	25-44	45-64	65+
Investing in projects to protect the environment	1	3	3	2	2
Supporting other vulnerable customers	2	2	2	3	3
Supporting customers over the age of 60	3	7	5	1	1
Supporting customers who are less able to pay their bills	4	1▼	1▼	4▲	4▲
Improving customer service	5	4	6	5	5
Connecting those not already on mains gas	6	5	4	6	7▼
Improving reliability to reduce risk of supply loss	7	6	7	7	6

Note: Arrows denote whether the sub-group is significantly higher or lower than the average.
Source: CEPA and Impact analysis

[49] Most and least popular 'first choice' initiatives for different age groups.

In particular, younger consumers are much less keen to support initiatives that support consumers over the age of 60 (this ranked lowest for the 18-24 age group for example) but are more supportive of initiatives that support customers who are less able to pay their bills in general (which may include some elderly customers). Conversely, older consumers strongly support initiatives that help customers over the age of 60 but are not as supportive of initiatives that help customers who are less able to pay their bills.

While 'investing in projects to protect the environment' featured the most often in respondents' rankings, it was not the most popular option for any age group.

6.2.1. Willingness to pay for additional services

We also asked consumers how much they would be willing to pay in addition to their current monthly energy bill to make the initiatives that they had selected happen.[50]

Table 6.5: Amount that individuals would be willing to pay per month for the services they selected (up to three)

WTP	% of responses
Nothing	40%
£1	15%
£2	15%
£3	10%
£4	4%
£5	12%
More than £5	4%
Mean £	1.69

Source: CEPA and Impact analysis

40% of consumers would not be willing to pay anything on top of their monthly bill for the additional services they selected, and a further 15% would only be willing to pay £1. The mean willingness to pay is £1.69 per month. Nevertheless, 12% of consumers would be willing to pay £5 more per month, and 4% would be willing to pay even more than this.

6.3. Possible areas to explore further

The box below presents possible areas which the UR may wish to explore further based on our analysis in this chapter.

Box 8: Other services – areas to explore further

- We identified that the main stated barrier to taking up energy efficiency services is the expected initial outlay, and that this applies to 22% of households with incomes of up to

[50] It is important to note that a full 'willingness to pay' study was beyond the scope of this survey. Respondents were simply asked how much they would be willing to pay for all (between zero and three) of the additional services they had selected.

£15,499. Given the support that is provided to these households to take up energy efficiency measures under domestic heating grants and schemes, this suggests that there is the potential for an important sub-group of consumers to benefit from energy efficiency services relatively easily if the scheme is effectively publicised and communicated to them.

- More generally, to encourage the up-take of energy efficiency services, it may be important to overcome the obstacles of affordability, and the alignment of incentives in the rental market. Further exploration of barriers to the take up of energy efficiency services may be beneficial.
- Investing in projects to protect the environment and supporting vulnerable customers (though of different types) appear to be the most important initiatives to consumers. This may help to inform a number of areas of the UR's and Government policy going forward.

Source: CEPA and Impact analysis

APPENDIX A THE CONSUMER TRACKER SURVEY

Text in blue are instructions for the scripters

OE = Open ended question

S = Single code (can select only one)

M = Multi code (can select more than one option)

G = Grid question

QHIDXXX = Quota information (hidden variable)

SAMPLE

1 ONLINE PANEL

2 CATI

INTRODUCTION TO THE RESEARCH AND ADHERENCE TO MRS CODE OF CONDUCT

Thank you for agreeing to participate in this market research which we are carrying out on behalf of NI's Utility Regulator. The Utility Regulator is a government department, responsible for promoting the interests of consumers in NI's electricity, gas, water and sewerage industries. The survey should take no more than 20 minutes to complete, depending on the answers you give us.

This is a genuine market research study and no sales call will result from our contact with you. The interview will be carried out in strict accordance with the Market Research Society's Code of Conduct. Your identity and any information you provide to us will be kept confidential and will not be used for any commercial purposes other than this research.

Freephone verification service

If you would like to check the validity of this research survey or seek reassurance that Impact Research is a responsible organisation that will keep the information you give it safe, you can do so by calling the Market Research Society UK Freephone verification service free* on 0500 39 69 99 or visiting: http://www.theresearchbuyersguide.com/freephone/alpha/all

*Calls to Freephone made from outside the UK may incur charges.

DEMOGRAPHIC

S ASK ALL

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

1) Yes, happy to take part
2) No, I do not want to take part **CLOSE**

S ASK ALL

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

1) Yes – solely responsible
2) Yes – jointly responsible
3) No – not responsible **CLOSE**
4) Prefer not to say **CLOSE**

S ASK ALL

S3 Can you tell me which of the following age categories applies to you?

1) Under 18 **CLOSE ADD TEXT TO EXPLAIN AGE CRITERIA FOR SURVEY**
2) 18-24 **QUOTA**
3) 25-44 **QUOTA**
4) 45-64 **QUOTA**
5) 65+ **QUOTA**
6) Prefer not to say

S ASK ALL,

S4 Please state your gender.

1) Male **QUOTA**
2) Female **QUOTA**
3) Other **MONITOR**
4) Rather not say **MONITOR**

MAIN QUESTIONS

Fuel switching/alternative fuel

S ASK ALL

Q1 Which of the following types of energy do you use to heat your home?

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

1) Electricity heating/economy 7
2) Gas heating
3) Oil
4) Other fuel supply e.g. gas canisters/coal/solid fuel

S ASK ALL

Q1B How many years have you been using <ANSWER AT Q1> to heat your home?

1) Under 1 year
2) 1-three years
3) 3-5 years
4) Over 5 years
5) Not sure

S ASK ALL

Q2 Thinking about your energy for heating your home, do you think you will switch from using <ANSWER AT Q1> to another energy source in the next three years? By this we mean the source such as gas or electricity, not your supplier.

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

S ASK THOSE THAT SAY YES AT Q2 – DO NOT SHOW ANSWER FROM Q1

Q3 Which energy type do you intend to switch to for heating your home?

1) Electricity heating/economy 7
2) Gas heating
3) Oil
4) Other fuel supply e.g. gas canisters/coal/solid fuel
5) Not sure

OE ASK THOSE THAT ARE NOT USING MAINS GAS AT Q1

Q4 If it is available in your area, why have you not switched to using mains gas for heating your home? E.g. concerned about costs, don't want the hassle, didn't realise I could, etc.

2) Mains gas is not available at my home
3) Not sure

Payment method

S ASK IF CODE CODE 2 OR 4 AT Q1

Q5 How much does your household spend on <ANSWER AT Q1> to heat your home each month?

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

1) Up to £30

2) £30-59
3) £60-99
4) £100 or more
5) Don't know

S ASK ALL

Q5a How much does your household spend on electricity in total (i.e. heating, lighting, appliances, etc.) each month?

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

1) Up to £30
2) £30-59
3) £60-99
4) £100 or more
5) We don't use any electricity in the household **NOT SHOWN TO THOSE THAT SAY THEY USE ELECTRICTY AT Q1**
6) Don't know

S ASK THOSE THAT USE OIL AT Q1

Q5b Which of the following sizes of oil delivery do you normally order for home heating?

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

1) 300 litres
2) 500 litres
3) 900 litres
4) Other specify
5) Don't know

S ASK THOSE THAT USE OIL AT Q1

Q5c How frequently do you have oil delivered to your home?

1) Once a year
2) Twice a year
3) 3 or 4 times a year
4) 5 or 6 times a year
5) 7 or 8 times a year
6) 9-12 times a year

IF USE OIL Q1, USE Q5B AND LITRES ORDERED TO CALCULATE MONTHLY SPEND. AVERAGE PRICES ARE:

300 LITRES	500 LITRES	900 LITRES
£185.98	£288.14	£499.00

QHIDBILLVALUE= COMBINED ANNUAL FIGURES

	Per Year
1	Up to £360
2	£360-£708
3	£720-£1,188
4	Over £1,200
5	Don't know

S ASK THOSE THAT DO NOT USE ELECTRICTY TO HEAT THEIR HOMES AT Q1

Q5d How do you pay for your home heating?

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

S ASK ALL UNLESS CODE 5 AT Q5A

Q5e How do you pay for your electricity (including heating, lighting, appliances, etc.)?

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

S ASK ALL

Q6 We would like to understand a little more about how your financial situation is affected by your electricity and home heating costs. Which of the following statements best describes your situation?

1) I never struggle to pay my energy bills
2) I sometimes struggle to pay my energy bills but I usually manage to keep on top of it
3) I struggle to pay my energy bills and I am often behind in my payments
4) I always struggle to pay my energy bills and I am nearly always behind in my payments
5) I would rather not say

S ASK THOSE THAT STRUGGLE AT Q6 i.e. 3) AND 4)

Q6A Have you got a repayment plan in place with your supplier?

This is where you pay fixed amounts over a set period of time, meaning you'll pay what you can afford. The payment plan will cover what you owe plus an amount for your current use.

1) Yes
2) Didn't know I could set up a payment plan
3) No
4) Not sure

G ASK ALL

Q7 How do you think the costs of gas and electricity in NI compare to the Republic of Ireland and to Great Britain? NI is….

CATI VERSION:

How do you think the cost of energy in NI compare to the Republic of Ireland?...And how about Great Britain? NI is…

	Significantly cheaper	Slightly cheaper	Similar costs	Slightly more expensive	Significantly more expensive	Don't know
Republic of Ireland						
Great Britain						

S ASK ALL

Q8 Thinking about the last 2 years, have you ever gone without heating, lighting or energy that you really needed in your home because the energy costs were too high?

1) Never
2) Occasionally (a few times a year)

3) Often (around once a month)
4) Regularly (most weeks)
5) Would rather not say

S ASK ALL

Q9 Do you have a pre-payment meter?

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

1) Yes – for electricity and gas
2) Yes – for electricity only
3) Yes – for gas only
4) No
5) Don't know

M ASK IF HAVE A PRE-PAYMENT METER FOR ELECTRIC AT Q9

Q9A Which of the following reasons describes why you have a pre-payment meter <u>for electricity</u>?

Please select all that apply

1) It is convenient for me
2) The property came with one
3) I was offered one by my supplier
4) To help my household budget energy costs
5) I don't need to worry about being cut off due to not paying a bill
6) To monitor energy use
7) I was given one as part of debt collection
8) I've never been given the option to move away from a pre-payment meter
9) Other (please specify)
10) Don't know **(exclusive answer)**

M ASK IF HAVE A PRE-PAYMENT METER FOR GAS AT Q9

Q9B Which of the following reasons describes why you have a pre-payment meter <u>for gas</u>?

Please select all that apply

1) It is convenient for me
2) The property came with one
3) I was offered one by my supplier
4) To help my household budget energy costs
5) I don't need to worry about being cut off due to not paying a bill
6) To monitor energy use
7) I was given one as part of debt collection
8) I've never been given the option to move away from a pre-payment meter
9) Other (please specify)

10) Don't know **(exclusive answer)**

S ASK ALL UNLESS CODE 5 AT Q5A

Q10 Which of the following best describes the tariff you are on for your electricity?

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

S ASK ALL WHO USE GAS TO HEAT THEIR HOME AT Q1

Q10A Which of the following best describes the tariff you are on for your gas?

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

Understanding of energy market

S ASK ALL

Q11 How well do you know <u>your supplier</u> (e.g. the services they offer, what discounts they have, if you can switch to another supplier and how, etc.)? I have…

	1 Good knowledge	2 Some knowledge	3 Little knowledge	4 Very limited knowledge
ASK IF CODE 2 AT Q1 Gas supplier				
ASK ALL Electricity supplier				

G ASK ALL

Q11Bi In general, how well do you know the following energy suppliers in NI? IF PHONE, READ EACH SUPPLIER IN TURN AND ASK Have you ever heard of <>?

Randomise	1 Never heard of	2 Heard of	3 They are my current supplier
Click energy			

Budget Energy			
Electric Ireland			
SSE Airtricity			
Power NI			
Firmus Energy			

Q11Bii Now thinking about these suppliers, how much knowledge do you have of them? Please use a scale of 1 to 5, where 1 is 'Know very little about' and 5 is 'have good knowledge of'.

Randomise **Pipe in all heard of/are their supplier in Q11Bi**	1 Know very little about	2	3	4	5 Have good knowledge
Click energy					
Budget Energy					
Electric Ireland					
SSE Airtricity					
Power NI					
Firmus Energy					

G ASK ALL

Q12 When it comes to the following, which have 'improved', ''not changed' or 'been made worse' due to increased choice of electricity and gas suppliers in NI?

Randomise	Improved	No change	Been made worse	Don't know
Cost of electricity and gas				
Service provided				
Tariff options available				

Responsiveness of suppliers to customer needs				
Suppliers which suit individual needs				

S ASK ALL – WORDING BASED ON ANSWERS GIVEN PREVIOUSLY

Q12A How easy or difficult do you believe it is to compare different deals for…? Please use a scale of 1 to 5 where 1 is very difficult, and 5 is very easy.

Randomise	1 Very difficult	2	3	4	5 Very easy	Don't know
Electricity						
Gas						

Switching & engagement

S ASK ALL

Q13 How many times, if at all, have you ever switched your supplier?

	Never	Once	2 or 3 times	4 or more times	Don't know
ASK IF CODE 2 AT Q1 Gas supplier					
ASK ALL Electricity supplier					

S ASK IF SWITCHED AT Q13

Q14 When was the last time you switched your supplier?

	Under 1 year ago	1-2 years ago	2 -three years ago	three years ago or more	Not sure
ASK IF CODE 2 AT Q1 Gas supplier					

ASK ALL Electricity supplier					

M ASK IF SWITCHED AT Q13

Q14A Thinking of the last time you switched supplier (or more recently compared suppliers/tariffs), what were your main reasons for doing so?

Please select all that apply

1) Felt I was overpaying
2) Saw a promotional offer with another supplier
3) Advised to by family or friends
4) Saw a media advertisement (e.g. TV advert) for another supplier
5) Experienced poor customer service
6) Other (please specify)
7) Not sure

S ASK IF SWITCHED AT Q13

Q14B How did you switch from your previous…

	Via the telephone	Via the internet	Via a doorstep seller	Other (please specify)	Cannot remember
ASK IF CODE 2 AT Q1 Gas supplier?					
ASK ALL Electricity supplier?					

S ASK IF SWITCHED AT Q13

Q14C Compared to your previous supplier, are you now paying more, less or the same?

	Significantly less	Slightly less	Similar amount	Slightly more	Significantl y more	Not sure
ASK IF CODE 2 AT Q1 Gas supplier						

ASK ALL Electricity supplier						

S ASK IF SWITCHED AT Q13

Q14D Overall, was the experience of switching suppliers positive, negative or indifferent? Please use a scale of 1-5 where 1 is very negative and 5 is very positive

	1 Very negative	2	3	4	5 Very positive	Cannot remember
ASK IF CODE 2 AT Q1 Gas supplier						
ASK ALL Electricity supplier						

M ASK IF NEVER SWITCHED AT Q13

Q15 Why have you never switched your…

Please select all that apply

	Didn't realise I could switch	Happy with current service	Feel I am on the cheapest option	Reputation of the supplier is better than other suppliers	Wouldn't know how to	Other (please specify)	Not sure
ASK IF CODE 2 AT Q1 Gas supplier?							
ASK ALL Electricity supplier?							

S ASK ALL

Q16 How likely are you to switch suppliers in the next 12 months? Please use a scale of 1-5 where 1 is not at all likely and 5 is very likely

	1 Not at all likely	2	3	4	5 Very likely	Don't know
ASK IF CODE 2 AT Q1 Gas supplier						
ASK ALL Electricity supplier						

S ASK ALL

Q17 Are you aware of the energy price comparison tool provided by the Consumer Council of NI?

1) Yes, and I have used it
2) Yes, but never used it
3) No

Trust & Confidence

S ASK ALL

Q18 Are you aware that your energy supplier has to meet certain minimum standards of customer service?

1) Yes, and I feel I am protected as a consumer as a result
2) Yes, but do not feel these protect me as a consumer
3) No
4) Don't know

Comms, including billing

S ASK ALL

Q19 How do you receive your…

	In the post	Via email or online	Through an app	Other (please specify)

ASK IF CODE 2 AT Q1 Gas bill?				
ASK ALL Electricity bill?				

G ASK ALL

Q20 Thinking about when you last received the following, did you read and understand the information provided?

Randomise	Didn't read it	Only glanced at it	Read it but it wasn't very clear	Read it and I understood most of it	Read it and understood all of it	N/A never received
Annual statement						
Bill/Direct debit statement						
Price increase letter						
Information about a promotional offer ending						

Complaint handling

S ASK ALL

Q21 Have you ever complained to your previous or current …?

Gas supplier? [ASK IF CODE 2 AT Q1]

1) Yes
2) No
3) Don't know

Electricity suppliers? **[ASK UNLESS CODE 5 AT Q5A]**

1) Yes
2) No

3) Don't know

S ASK TO THOSE THAT HAVE COMPLAINED AT Q21

Q21A How quickly was your most recent complaint resolved?

1) Never and not expecting it to be
2) On-going
3) Within a day
4) Within two weeks
5) Within a month
6) Took longer than a month to resolve
7) Not sure

S ASK TO THOSE THAT HAVE COMPLAINED AT Q21

Q21B How satisfied were you with the outcome of your most recent complaint?

1) Very dissatisfied
2) Dissatisfied
3) Neither satisfied or dissatisfied
4) Satisfied
5) Very satisfied

S ASK THOSE WHO HAVE NOT COMPLAINED AT Q21

Q21C Have you ever wanted to complain to your current or previous supplier?

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

S ASK IF NO TO ELECTRICITY OR GAS AT Q21

Q22 If you had a concern relating to your gas/electricity supplier, would you know how to go about making a complaint?

1) Yes
2) No
3) Not sure

Vulnerability

S ASK ALL

Q23 Are you aware energy companies have special services in place to support those who are vulnerable the community/those that need extra support? For example, customers with disabilities, those with mental health issues, etc.

1) Yes – and know a bit about the services offered

2) Yes – but don't know what these services are
3) No
4) Not sure

M ASK ALL

Q24 Have you used any support services offered by energy companies?

Please select all that apply

1. Signed up to the Critical Care Register
2. Signed up to the Customer Care Register
3. Requested a large print bill
4. Included in the Password Scheme
5. Other (specify)
6. None of these

S ASK ALL WHO USED A SERVICE AT Q24 REPEAT FOR EACH SERVICE SELECTED

Q24A Thinking about the service provided how satisfied were you with this? Please rate on a scale of 1-10, where 1 is very dissatisfied and 10 is very satisfied?

Very Dissatisfied									Very Satisfied	Don't know
1	2	3	4	5	6	7	8	9	10	98

Satisfaction & VfM

S ASK ALL

Q25 How satisfied are you with the overall service you receive from your energy supplier(s). Please rate on a scale of 1-10, where 1 is very dissatisfied and 10 is very satisfied?

	Very Dissatisfied									Very Satisfied	Don't know
Electricity ASK UNLESS CODE 5 AT Q5A	1	2	3	4	5	6	7	8	9	10	98
Gas ASK IF	1	2	3	4	5	6	7	8	9	10	98

SELECTED AT Q1											
Other	1	2	3	4	5	6	7	8	9	10	98

G ASK ALL

Q26 To what extent do you trust your energy supplier to give you clear information and a fair price? Please use a scale of 1-10 where 1 is do not trust at all and 10 is completely trust.

SHOW FOR TYPE SELECTED AT Q1

	Do not trust at all									Completely trust	Don't know
Electricity ASK UNLESS CODE 5 AT Q5A	1	2	3	4	5	6	7	8	9	10	98
Gas ASK IF SELECTED AT Q1	1	2	3	4	5	6	7	8	9	10	98
Other	1	2	3	4	5	6	7	8	9	10	98

Energy efficiency

S ASK ALL

Q27 Have you put any energy efficiency measures in place in your home in the last three years? For example, double glazing, cavity wall insulation, loft insulation, etc. Please do not include smaller measures such as energy saving lightbulbs.

1) Yes
2) No
3) Not sure

M ASK IF CODE 2 OR 3 AT Q27

Q28 Why haven't you put any energy efficiency measures in place in your home in the last three years?

Please select all that apply

1) Cannot afford the initial outlay
2) Don't think they are needed
3) Lack of information
4) It would cause too much disruption
5) These were already in the home
6) Installed them more than three years ago
7) I rent my property/have no control over structural changes
8) Recently moved house
9) Other (please specify)
10) No reason **(exclusive answer)**
11) Not sure **(exclusive answer)**

Broader market engagement

M ASK ALL

Q29 For which, if any, of the following services have you switched your provider in the last 12 months?

a) Yes
b) No

1) Mobile phone provider
2) Internet provider
3) Landline phone provider
4) Bank/building society current account

WTP

S ASK ALL, RANDOMISE

Q30ai Which of these initiatives, if any, would you want most from your <INSERT FROM Q1> supplier?

Please only choose 1 option

PHONE only – repeat list for respondent.

1) Investing in projects to protect the environment
2) Supporting customers over the age of 60
3) Supporting other vulnerable customers (not only those over the age of 60)
4) Supporting customers who are less able to pay their bills

1) Improving reliability to reduce risk of supply loss
2) Connecting those not already on mains gas
3) Improving customer service

S ASK ALL, RANDOMISE, DO NOT SHOW OPTION SELECTED AT Q30ai

Q30aii Which of these initiatives, if any, would you want next from your <INSERT FROM Q1> supplier?

Please only choose 1 option

1) Investing in projects to protect the environment
2) Supporting customers over the age of 60
3) Supporting other vulnerable customers (not only those over the age of 60)
4) Supporting customers who are less able to pay their bills
1) Improving reliability to reduce risk of supply loss
2) Connecting those not already on mains gas
3) Improving customer service
8) Nothing else

S ASK UNLESS CODE 8 SELECTED AT Q30aii, RANDOMISE, DO NOT SHOW OPTION SELECTED AT Q30ai and Q30aii

Q30aiii Which of these initiatives, if any, would you also want from your <INSERT FROM Q1> supplier?

Please only choose 1 option

1) Investing in projects to protect the environment
2) Supporting customers over the age of 60
3) Supporting other vulnerable customers (not only those over the age of 60)
4) Supporting customers who are less able to pay their bills
5) Improving reliability to reduce risk of supply loss
6) Connecting those not already on mains gas
7) Improving customer service
8) Nothing else

S ASK ALL

Q30b If these <insert number selected> initiatives were provided by your supplier, what is the most you would be willing to pay in addition to your current monthly energy bill to make this possible?

SHOW THE CHOSEN INITIATIVES

1) Nothing
2) £1 per month more
3) £2 per month more
4) £3 per month more
5) £4 per month more
6) £5 per month more
7) More than £5 per month

Final demographics

Finally we would like to ask some question about you. This will ensure that we are speaking to a range of customers

S ASK ALL,

S5 Can I check, is English your first or main language?

1) Yes, and I speak no other language
2) Yes, but I speak one or more other languages
3) No **PLEASE SPECIFY LANGUAGE**
4) Rather not say

S ASK ALL

S6 What is the highest level of education you have completed? CATI do no read out responses

1) 1 - 4 O levels/CSEs/GCSEs (any grades), Entry Level, Foundation Diploma
2) NVQ Level 1, Foundation GNVQ, Basic Skills
3) 5 or more O levels (passes)/CSEs (grade 1)/GCSEs (grades A*- C), School Certificate, 1 A level/2 - 3 AS levels/VCEs, Higher Diploma
4) NVQ Level 2, Intermediate GNVQ, City and Guilds Craft, BTEC First/General Diploma, RSA Diploma
5) Apprenticeship
6) 2+ A levels/VCEs, 4+ AS levels, Higher School Certificate, Progression/Advanced Diploma
7) NVQ Level 3, Advanced GNVQ, City and Guilds Advanced Craft, ONC, OND, BTEC National, RSA Advanced Diploma
8) Degree (for example BA, BSc), Higher degree (for example MA, PhD, PGCE)
9) NVQ Level 4 - 5, HNC, HND, RSA Higher Diploma, BTEC Higher Level
10) Professional qualifications (for example teaching, nursing, accountancy)
11) Other vocational/work-related qualifications
12) Foreign qualifications
13) None of these

S ASK ALL

S7 There are a wide range of factors that could mean anyone might need extra help or support

Do you feel that any of the following factors apply to you or anyone in your household at the moment?

	S7 You/anyone in household
1. Chronic/serious illness	
2. Medically Dependant Equipment	
3. Oxygen use	

4. Physical Impairment	
5. Unable to answer door	
6. Pensionable Age	
7. Young children aged 5 or under	
8. Blind	
9. Partially sighted	
10. Hearing/speech difficulties (including deaf)	
11. Unable to communicate in English	
12. Dementia	
13. Developmental condition	
14. Mental Health	
15. Temporary - life change for example post hospital recovery	
16. Caring for another member of your family outside the household	
17. None of the above **EXCLUSIVE**	
18. Prefer not to say **EXCLUSIVE**	

QHIDVULERABLE IF CODE 1-16 AT S7

S ASK ALL

S8 This card shows incomes in monthly and annual amounts. Which of these groups represents your household income?

PHONE ONLY I would like you to tell me your household income from the following bands. Would you prefer to answer in monthly or annual amounts? READ APPROPRIATE COLUMN AND CODE.

ONLY NEED TO PROVIDE AN ANSWER IN ONE COLUMN

	PER MONTH	PER YEAR

1	Up to £539	Up to £6,499
2	£540 - £789	£6,500 - £9,499
3	£790 - £1289	£9,500 - £15,499
4	£1290 - £2079	£15,500 - £24,999
5	£2080 - £3329	£25,000 - £39,999
6	£3330 - £4999	£40,000 - £59,999
7	£5000 - £7499	£60,000 - £89,999
8	£7500 and over	£90,000 and over
98	Don't know	Don't know
99	Prefer not to say	Prefer not to say

QHIDINCOME

A CODE 1-3

B CODE 4-5

C CODE 6-8

S ASK ALL

S10 How many members/people (including children) are there in your household altogether (that are currently living at home with you)?

Please include yourself in the total.

1) Just me
2) 2
3) 3
4) 4
5) 5
6) 6+

S ASK IF CODES 2-6 AT S10

VALIDATION: CHECK THE ANSWER AT S11 IS NOT HIGHER THAN THAT AT S10

S11 How many children under the age of 18 live in your household?

1) None
2) ENTER NUMBER OF CHILDREN ______

S ASK ALL

S12 In which type of location do you currently live?

1) Urban location
2) Sub-urban location
3) Rural location
4) Don't know

END OF SURVEY

Thank you for completing this survey on behalf of NI's Utility Regulator, your time and responses are greatly appreciated.

APPENDIX B EXTENDED DATA TABLES

Figure B.1. Q1: Which of the following types of energy do you use to heat your home? by Banner
Weight: Weight2; base n = from 1275 to 1503; total n = 1503; 228 missing

Q1: Which of the following types of energy do you use to heat your home?	Banner: S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Electricity heating/ economy 7	23%↑	7%	5%↓	4%↓	8%	8%	7%	10%	8%	0%	12%↑	9%	4%↓	11%	7%	7%	8%	9%	9%	7%	0%	0%	0%	0%
Gas heating	34%	26%	20%↓	24%	25%	26%	23%	28%	21%↓	100%↑	37%↑	34%↑	8%↓	27%	25%	25%	26%	25%	17%↓	28%	57%↑	68%↑	4%↓	82%↑
Oil	40%↓	63%	72%↑	70%↑	63%	64%	68%↑	60%↓	68%↑	0%↓	49%↓	55%↓	83%↑	58%	66%	66%	63%	64%	72%	61%	40%↓	31%↓	92%↑	14%↓
Other fuel supply e.g. gas canisters / coal/solid fuel	2%	3%	4%	2%	4%	2%	3%	3%	3%	0%	1%	2%	5%↑	4%	2%	2%	3%	2%	2%	4%	2%	2%	3%	4%
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Figure B.2. Q2: Thinking about your energy for heating your home, do you think you will switch from using [pipe: Q1 lower] to another energy source in the next 3 years? by Banner
Weight: Weight2; base n = from 1275 to 1503; total n = 1503; 228 missing

Q2: Thinking about your energy for heating your home, do you think you will switch from using [pipe: Q1 lower] to another energy source in the next 3 years?	Banner: S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
NET: Yes	58%↑	30%↑	13%↓	9%↓	25%	23%	19%↓	31%↑	23%	36%	34%↑	26%	15%↓	27%	26%	23%	20%	28%	27%	26%	20%	47%↑	19%↓	25%
Yes – within the next year	15%↑	10%↑	3%↓	2%↓	8%	6%	4%↓	11%↑	7%	11%	10%↑	8%	3%↓	9%	7%	7%	8%	5%	6%	7%	7%	13%	4%	7%
Yes – in the next 1-3 years	35%↑	13%	5%↓	4%↓	11%	11%	9%↓	15%↑	11%↓	22%↑	17%↑	12%	8%↓	11%	14%	12%	8%↓	19%↑	14%	12%	9%	32%↑	9%	14%
Yes – but not in the next 3 years	7%	7%	5%	3%↓	6%	6%	5%	5%	6%	3%	7%	6%	4%	7%	5%	5%	5%	3%	7%	7%	5%	3%	6%	4%
No	23%↓	58%↓	75%↑	87%↑	65%	64%	70%↑	57%↓	65%	54%	57%↓	59%↓	76%↑	59%	62%	68%	71%↑	62%	63%	58%↓	70%	43%↓	71%↑	61%
Not sure/ don't know	19%↑	12%	12%	4%↓	10%	13%	11%	11%	11%	10%	9%	16%↑	10%	14%	12%	9%	9%	10%	10%	16%↑	9%	10%	10%	14%
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Figure B.3. Q3: Which energy type do you intend to switch to for heating your home? by Banner
Weight: Weight2; base n = from 251 to 296; total n = 1503; 1252 missing

Banner	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
Q3: Which energy type do you intend to switch to for heating your home?	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Electricity heating/ economy 7	39%↑	12%	4%↓	3%	18%	20%	21%	16%	17%	40%	25%	11%	22%	23%	21%	10%	19%	20%	22%	16%	46%↑	41%	13%↓	22%
Gas heating	31%↓	63%	77%↑	74%	53%	59%	54%	58%	61%↑	0%↓	53%	58%	53%	52%	55%	61%	64%	39%	44%	61%	35%	17%↓	73%↑	26%↓
Oil	18%	9%	3%	3%	14%	7%	7%	14%	9%↓	32%↑	7%	20%↑	5%	13%	8%	14%	4%	23%↑	11%	10%	13%	17%	4%↓	23%
Other fuel supply e.g. gas canisters / coal/solid fuel	2%	9%	4%	14%	6%	6%	6%	7%	5%	20%	4%	6%	11%	8%	6%	4%	5%	7%	9%	7%	2%	17%	5%	10%
Not sure	10%	6%	12%	6%	9%	9%	12%	6%	8%	8%	11%	5%	8%	3%	10%	11%	8%	11%	13%	6%	4%	9%	5%	18%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.4. Monthly bill in Euro by Banner
Weight: Weight2; base n = from 1258 to 1480; total n = 1503; 245 missing

Banner	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
Monthly bill in Euro	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
15	12%	7%	9%	9%	9%	9%	9%	8%	8%↓	19%↑	11%	10%	5%↓	15%↑	7%	5%↓	6%↓	8%	12%	11%	6%	12%	4%↓	25%↑
21-50	31%↑	18%	14%↓	19%	20%	17%	18%	19%	17%↓	35%↑	23%↑	24%↑	10%↓	23%	19%	14%	18%	22%	12%	20%	22%↑	29%↑	8%↓	44%↑
51-100	21%	18%	18%	15%	17%	19%	15%↓	22%↑	16%↓	45%↑	21%	17%	15%	11%↓	18%	26%↑	24%↑	19%	14%	13%↓	37%↑	30%↑	10%↓	18%
100+	36%↓	56%	60%↑	57%	54%	55%	58%↑	51%↓	58%↑	0%↓	44%↓	49%↓	69%↑	51%	56%	55%	51%	51%	62%	56%	35%↓	30%↓	78%↑	13%↓
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.5. Q5d: How do you pay for your home heating? by Banner
Weight: Weight2; base n = from 1190 to 1406; total n = 1503; 313 missing

Banner	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
Q5d: How do you pay for your home heating?	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Monthly direct debit (where your supplier takes the same amount of money from your bank account, each month, automatical	20%	13%	17%	17%	16%	16%	15%	17%	15%↓	35%↑	19%	22%↑	9%↓	9%↓	18%	20%	34%↑	8%↓	6%↓	5%↓	100%↑	0%↓	0%↓	0%↓
Quarterly direct debit (where your supplier takes money from your bank account automatically, to cover your last three m	14%↑	7%	3%↓	2%↓	4%	7%	4%	6%	4%↓	23%↑	6%	7%	3%↓	6%	4%	7%	3%↓	22%↑	1%↓	1%↓	0%↓	100%↑	0%↓	0%↓
Pay by cheque, cash or card on receipt of your bill	41%↓	60%	69%↑	72%↑	66%	58%↓	66%↑	58%↓	67%↑	8%↓	48%↓	52%↓	83%↑	59%	63%	65%	58%↓	66%	84%↑	58%↓	0%↓	0%↓	100%↑	0%↓
Prepayment or pay as you go meter (where you top up credit onto a key pad, key or card, or online, or using an app)	22%	19%↑	10%↓	8%↓	12%	16%	13%	16%	13%↓	35%↑	25%↑	18%	4%↓	22%↑	14%	5%↓	4%↓	4%↓	7%↓	35%↑	0%↓	0%↓	0%↓	100%↑
Other (specify)	3%	2%	2%	2%	2%	2%	2%	2%	2%	0%	2%	2%	1%	4%↑	1%↓	2%	2%	1%	3%	2%	0%	0%	0%↓	0%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.6. Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)? by Banner
Weight: Weight2; base n = from 1274 to 1501; total n = 1503; 229 missing

	Banner																							
Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Monthly direct debit (where your supplier takes the same amount of money from your bank account, each month, automatical	21%↓	32%↓	42%↑	45%↑	37%	35%	36%	36%	36%	35%	34%	39%	35%	23%↓	36%	53%↑	100%↑	0%↓	0%↓	0%↓	77%↑	21%↓	33%↓	10%↓
Quarterly direct debit (where your supplier takes money from your bank account automatically, to cover your last three m	25%	13%↓	16%	20%	18%	16%	18%	15%	16%	25%	16%	16%	18%	14%	16%	20%	0%↓	100%↑	0%↓	0%↓	8%↓	68%↑	17%	4%↓
Pay by cheque, cash or card on receipt of your bill	21%↑	10%	12%	15%	14%	13%	16%↑	9%↓	13%	7%	14%	12%	14%	17%↑	12%	8%↓	0%↓	0%↓	100%↑	0%↓	5%↓	3%↓	17%↑	6%↓
Prepayment or pay as you go meter (where you top up credit onto a key pad, key or card, or online, or using an app)	32%	43%↑	27%↓	15%↓	29%	32%	27%↓	37%↑	31%	32%	34%	31%	29%	43%↑	33%	15%↓	0%↓	0%↓	0%↓	100%↑	9%↓	6%↓	29%↓	78%↑
Other (specify)	1%	2%	4%	5%	3%	3%	4%	2%	3%	1%	2%	3%	4%	3%	3%	3%	0%↓	0%↓	0%↓	0%↓	2%	1%	4%	2%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.7. Q6: We would like to understand a little more about how your financial situation is affected by your electricity and home heating costs. Which of the following statements best describes your situation? by Banner
Weight: Weight2; base n = from 1275 to 1503; total n = 1503; 228 missing

	Banner																							
Q6: We would like to understand a little more about how your financial situation is affected by your electricity and home heating costs. Which of the following statements best describes your situation?	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
NET: Always/sometimes struggle	4%	3%	2%	2%	3%	2%	3%	3%	3%	3%	3%	3%	2%	5%↑	2%	0%↓	1%	4%	4%	3%	2%	6%	2%	5%
I never struggle to pay my energy bills	46%	51%↓	59%	70%↑	53%	61%	61%↑	50%↓	57%	45%	52%	58%	56%	41%↓	56%	74%↑	68%↑	57%	54%	43%↓	68%↑	44%	57%	49%
I sometimes struggle to pay my energy bills but I usually manage to keep on top of it	41%	40%	37%	28%↓	39%	33%	34%	41%	37%	43%	40%	33%	39%	47%↑	38%	25%↓	28%↓	35%	38%	48%↑	27%↓	44%	38%	42%
I struggle to pay my energy bills and I am often behind in my payments	9%↑	6%	2%↓	0%↓	5%	4%	2%↓	6%↑	4%	9%	5%	5%	3%	7%↑	4%	2%	2%	4%	4%	6%↑	3%	6%	3%	4%
I always struggle to pay my energy bills and I am nearly always behind in my payments	4%	3%	1%	0%	2%	2%	2%	2%	2%	3%	2%	2%	2%	4%↑	2%	0%↓	1%	2%	3%	3%	2%	4%	1%	4%
I would rather not say	0%	0%	1%	2%	1%	0%	1%	0%	1%	0%	1%	1%	1%	1%	0%	0%	1%	2%	1%	0%	0%	1%	1%	1%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.8. Q6a: Have you got a repayment plan in place with your supplier? by Banner
Weight: Weight2; base n = from 58 to 71; total n = 1503; 1445 missing

Q6a: Have you got a repayment plan in place with your supplier?	Banner: S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulnerable	Not vulnerable	No	Yes	No	Yes	Urban location	Sub-urban location	Rural location	Up to £15,499	£15,500 - £39,999	£40,000+	Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment or PAYG meter	Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Yes	18%	12%	5%	NaN	15%	10%	10%	15%	12%	21%	17%	15%	5%	6%	23%	21%	37%	15%	0%	8%	29%	0%	3%	7%
Didn't know I could set up a payment plan	73%	40%	37%	NaN	40%	64%	45%	51%	47%	67%	39%	64%	33%	66%	40%	16%	31%	77%	65%	43%	29%	85%	44%	65%
No	9%	45%	53%	NaN	43%	23%	43%	32%	39%	12%	39%	19%	62%	26%	37%	63%	26%	0%	35%	49%	43%	0%	53%	28%
Not sure	0%	3%	5%	NaN	2%	3%	2%	2%	3%	0%	4%	2%	0%	3%	0%	0%	6%	8%	0%	0%	0%	15%	0%	0%
NET	**100%**	**100%**	**100%**	**NaN**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.9: Q8: Thinking about the last 2 years, have you ever gone without heating, lighting or energy that you really needed in your home because the energy costs were too high? by Banner
Weight: Weight2; base n = from 1275 to 1503; total n = 1503; 228 missing

Q8: Thinking about the last 2 years, have you ever gone without heating, lighting or energy that you really needed in your home because the energy costs were too high?	Banner: S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulnerable	Not vulnerable	No	Yes	No	Yes	Urban location	Sub-urban location	Rural location	Up to £15,499	£15,500 - £39,999	£40,000+	Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment or PAYG meter	Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Never	45%↓	71%↓	82%↑	92%↑	72%↓	76%	80%↑	69%↓	77%↑	48%↓	68%↓	74%	80%↑	59%↓	75%	88%↑	85%↑	72%	64%↓	70%↓	82%	47%↓	81%↑	63%↓
Occasionally (a few times a year)	42%↑	19%	12%↓	6%↓	19%	17%	13%↓	23%↑	16%↓	38%↑	25%↑	16%	14%↓	26%↑	18%	10%↓	11%↓	20%	25%↑	21%↑	14%	28%↑	14%↓	25%↑
Often (around once a month)	9%↑	6%	2%↓	1%↓	5%	3%	4%	5%	4%	9%	4%	5%	3%	8%↑	5%	1%↓	2%↓	6%	6%	5%	1%↓	18%↑	2%↓	8%↑
Regularly (most weeks)	4%	3%	3%	1%↓	3%	2%	2%	3%	2%	4%	2%	4%	2%	5%↑	2%	0%↓	2%	1%	5%	3%	3%	5%	2%	3%
Would rather not say	0%	1%	1%	1%	0%	1%	1%	0%	1%	1%	1%	1%	1%	2%↑	0%	0%	1%	0%	1%	1%	1%	2%	0%	1%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.10. Q9: Do you have a prepayment meter? by Banner
Weight: Weight2; base n = from 1275 to 1503; total n = 1503; 228 missing

Q9: Do you have a prepayment meter?	Banner: S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulnerable	Not vulnerable	No	Yes	No	Yes	Urban location	Sub-urban location	Rural location	Up to £15,499	£15,500 - £39,999	£40,000+	Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment or PAYG meter	Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Yes – for electricity and gas	18%↑	16%↑	6%↓	5%↓	11%	11%	9%↓	14%↑	10%↓	35%↑	21%↑	12%	2%↓	16%↑	12%	5%↓	5%↓	3%↓	4%↓	26%↑	4%↓	4%	1%↓	60%↑
Yes – for electricity only	40%↑	37%↑	21%↓	12%↓	25%	29%	23%↓	34%↑	28%	19%	25%	25%	32%↑	37%↑	29%	16%↓	5%↓	8%↓	23%	68%↑	20%	16%	31%↑	17%↓
Yes – for gas only	16%↑	3%	3%	2%↓	5%	5%	4%	5%	4%↓	13%↑	6%	9%↑	1%↓	6%	5%	4%	3%	10%↑	9%↑	2%↓	1%↓	22%↑	1%↓	17%↑
No	22%↓	44%↓	69%↑	81%↑	58%	55%	63%↑	47%↓	58%↑	32%↓	46%↓	54%	64%↑	40%↓	53%	75%↑	86%↑	78%↑	61%	4%↓	75%↑	54%	66%↑	6%↓
Don't know	4%↑	0%	0%	0%	1%	0%	1%	1%	1%	0%	1%	0%	0%	2%	1%	0%	1%	0%	3%↑	0%	1%	4%↑	1%	0%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.11. Q9a. Which of the following reasons describes why you have a prepayment meter for electricity? by Banner
Weight: Weight2; base n = from 444 to 509; total n = 1503; 1059 missing

Q9a. Which of the following reasons describes why you have a prepayment meter for electricity?	Banner: S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
It is convenient for me	51%	58%	58%	80%↑	58%	56%	58%	59%	60%	43%	56%	51%	66%	57%	55%	63%	47%	16%↓	54%	63%↑	51%	24%	61%	59%
The property came with one	55%	53%	39%	27%↓	43%	51%	51%	45%	47%	57%	52%	51%	41%	47%	48%	44%	45%	28%	35%	52%	48%	38%	44%	63%↑
I was offered one by my supplier	18%	10%	12%	17%	14%	12%	10%	15%	13%	13%	13%	12%	12%	11%	15%	14%	17%	24%	31%↑	9%↓	10%	24%	11%	13%
To help my household budget energy costs	25%	31%	39%	42%	36%	27%	28%	36%	32%	30%	27%	30%	40%	32%	32%	33%	32%	33%	32%	32%	37%	32%	37%	25%
I don't need to worry about being cut off due to not paying a bill	29%	26%	26%	30%	29%	25%	26%	28%	27%	19%	28%	22%	30%	26%	28%	24%	28%	0%↓	30%	28%	29%	0%↓	30%	26%
To monitor energy use	14%	17%	20%	22%	18%	16%	17%	18%	18%	10%	15%	14%	24%	16%	19%	16%	15%	17%	25%	17%	22%	0%	22%	12%
I was given one as part of debt collection	0%↓	2%	3%	2%	3%	1%	1%	3%	2%	2%	2%	3%	0%	2%	2%	3%	9%↑	8%	0%	1%↓	2%	8%	1%	1%
I've never been given the option to move away from a prepayment meter	4%	10%	9%	14%	9%	10%	9%	9%	9%	11%	12%	8%	7%	10%	8%	5%	0%	0%	10%	11%	0%	8%	11%	12%
Other (please specify)	0%	3%	5%	3%	2%	4%	5%	1%	3%	0%	2%	3%	4%	2%	3%	5%	0%	3%	0%	4%	2%	6%	4%	2%
Don't know	0%	1%	0%	0%	0%	1%	1%	0%	1%	0%	1%	1%	0%	1%	1%	0%	2%	0%	0%	1%	0%	0%	0%	2%
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Figure B.12. Q9b. Which of the following reasons describes why you have a prepayment meter for gas? by Banner
Weight: Weight2; base n = from 171 to 199; total n = 1503; 1332 missing

Q9b. Which of the following reasons describes why you have a prepayment meter for gas?	Banner: S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
It is convenient for me	38%	50%	52%	78%	43%	60%	47%	52%	48%	56%	60%	43%	28%	41%	61%	34%	50%	16%↓	31%	61%↑	77%	10%↓	20%	60%
The property came with one	55%	53%	35%	15%↓	42%	50%	51%	43%	48%	42%	51%	45%	27%	49%	45%	58%	46%	41%	37%	52%	46%	6%↓	25%	54%
I was offered one by my supplier	28%	14%	30%	30%	23%	27%	22%	22%	24%	13%	20%	24%	25%	17%	26%	21%	24%	23%	40%	17%	0%	42%	16%	17%
To help my household budget energy costs	17%	19%	33%	26%	25%	21%	15%	29%	23%	18%	18%	29%	16%	27%	16%	32%	11%	19%	28%	25%	11%	23%	23%	25%
I don't need to worry about being cut off due to not paying a bill	21%	19%	26%	29%	24%	22%	17%	27%	20%	31%	21%	20%	46%	29%	21%	14%	12%	23%	11%	28%	0%	18%	19%	25%
To monitor energy use	17%	10%	11%	18%	13%	14%	10%	16%	13%	13%	14%	14%	4%	6%	17%	15%	13%	10%	16%	13%	34%	12%	11%	12%
I was given one as part of debt collection	0%	6%	4%	0%	3%	1%	3%	4%	3%	5%	5%	2%	0%	2%	4%	4%	5%	6%	4%	2%	0%	5%	0%	1%
I've never been given the option to move away from a prepayment meter	3%	10%	11%	11%	7%	9%	10%	7%	8%	10%	11%	6%	11%	10%	8%	12%	6%	6%	6%	11%	0%	0%	16%	10%
Other (please specify)	0%	5%	2%	4%	2%	1%	4%	1%	3%	0%	4%	1%	0%	3%	0%	0%	0%	0%	4%	4%	0%	0%	18%↑	2%
Don't know	3%	0%	0%	0%	0%	0%	2%	0%	1%	0%	0%	2%	0%	3%	0%	0%	0%	7%	0%	0%	0%	12%	0%	0%
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Figure B.13. Q10: Which of the following best describes the tariff you are on for your electricity? by Banner
Weight: Weight2; base n = from 1274 to 1501; total n = 1503; 229 missing

Banner

Q10: Which of the following best describes the tariff you are on for your electricity?	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Standard variable tariff (the suppliers default tariff)	66%	68%	71%	67%	65%	73%	73% ↑	62% ↓	69% ↑	52% ↓	68%	65%	72%	69%	69%	71%	67%	66%	71%	72%	64%	53%	71%	72%
A promotional tariff (e.g. fixed priced for a set amount of time, a promotional tariff with discount for a set amount of	21%	22%	16%	16%	21%	15% ↓	10% ↓	31% ↑	18% ↓	39% ↑	19%	25% ↑	14% ↓	16%	20%	21%	22%	23%	13%	14% ↓	23%	36% ↑	15% ↓	15%
Other (please specify)	1%	1%	1%	2%	2%	1%	2% ↑	0% ↓	1%	0%	2%	1%	1%	0%	2%	1%	1%	0%	2%	1%	1%	0%	1%	0%
Don't know	12%	10%	11%	15%	12%	12%	15% ↑	7% ↓	12%	9%	12%	10%	13%	15% ↑	9%	6%	10%	10%	14%	13%	12%	11%	12%	13%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.14. Q10a: Which of the following best describes the tariff you are on for your gas? by Banner
Weight: Weight2; base n = from 313 to 358; total n = 1503; 1190 missing

Banner

Q10a: Which of the following best describes the tariff you are on for your gas?	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Standard variable tariff (the suppliers default tariff)	69%	78%	82%	70%	74%	79%	75%	77%	80% ↑	61% ↓	78%	77%	68%	72%	80%	78%	74%	73%	64%	80%	74%	68%	67%	82%
A promotional tariff (e.g. fixed priced for a set amount of time, a promotional tariff with discount for a set amount of	31% ↑	12%	9%	12%	17%	12%	12%	19%	10% ↓	33% ↑	13%	14%	23%	20%	11%	16%	16%	21%	30%	8%	17%	26%	24%	8%
Other (please specify)	0%	0%	2%	0%	0%	1%	1%	0%	0%	1%	1%	1%	0%	0%	1%	1%	1%	0%	0%	0%	0%	0%	2%	1%
Don't know	0%	10%	7%	18% ↑	9%	8%	12%	5%	10%	6%	9%	9%	8%	8%	9%	5%	9%	6%	6%	12%	9%	6%	7%	10%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.15. Q11 Electricity supplier: How well do you know your supplier? I have... by Banner
Weight: Weight2; base n = from 1275 to 1503; total n = 1503; 228 missing

Banner

Q11. Electricity supplier How well do you know your supplier? I have...	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulnerable	Not vulnerable	No	Yes	No	Yes	Urban location	Sub-urban location	Rural location	Up to £15,499	£15,500 - £39,999	£40,000+	Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment or PAYG meter	Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
NET: Top 2 box	39%	47%	46%	46%	45%	48%	50%↑	39%↓	46%↑	29%↓	47%	43%	45%	52%↑	42%	43%	41%	45%	46%	50%	37%↓	38%	49%↑	47%
NET: Bottom 2 box	61%	53%	54%	54%	55%	52%	50%↓	61%↑	54%↓	71%↑	53%	57%	55%	48%↓	58%	57%	59%	55%	54%	50%	63%↑	62%	51%↓	53%
1-Good knowledge	12%	19%	21%	27%↑	21%	18%	20%	20%	20%	19%	20%	17%	23%	19%	18%	24%	21%	20%	22%	19%	22%	18%	20%	20%
2-Some knowledge	49%↑	34%	34%	27%↓	34%	34%	30%↓	41%↑	34%↓	52%↑	33%	41%↑	32%	29%↓	40%↑	33%	38%	35%	31%	31%	41%	44%	30%	33%
3-Little knowledge	24%	25%	22%	17%↓	21%	24%	22%	22%	23%	16%	24%	23%	20%	25%	20%	23%	20%	19%	20%	28%↑	20%	13%	23%	29%
4-Very limited knowledge	15%	21%	24%	29%↑	24%	23%	27%↑	16%↓	23%	12%	23%	20%	25%	27%	22%	20%	21%	26%	27%	21%	17%	25%	26%↑	18%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.16. Q11 Gas supplier: How well do you know your supplier? I have... by Banner
Weight: Weight2; base n = from 313 to 358; total n = 1503; 1190 missing

Banner

Q11. Gas supplier How well do you know your supplier? I have...	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulnerable	Not vulnerable	No	Yes	No	Yes	Urban location	Sub-urban location	Rural location	Up to £15,499	£15,500 - £39,999	£40,000+	Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment or PAYG meter	Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
NET: Top 2 box	38%	56%	59%	51%	52%	54%	57%	47%	57%	37%	59%	50%	36%	65%	46%	48%	46%	54%	40%	62%	39%	58%	61%	58%
NET: Bottom 2 box	62%	44%	41%	49%	48%	46%	43%	53%	43%	63%	41%	50%	64%	35%	54%	52%	54%	46%	60%	38%	61%	42%	39%	42%
1-Good knowledge	17%	15%	16%	26%	18%	18%	20%	15%	18%	16%	12%	20%	21%	15%	17%	23%	19%	10%	24%	18%	24%	9%	11%	18%
2-Some knowledge	45%	29%	25%	24%	30%	28%	23%	38%	25%	47%	29%	30%	43%	20%	38%	29%	35%	37%	37%	19%	37%	33%	28%	24%
3-Little knowledge	24%	23%	31%	17%	25%	22%	25%	23%	26%	19%	24%	26%	22%	34%	20%	20%	19%	23%	10%	32%	14%	27%	21%	31%
4-Very limited knowledge	14%	32%	28%	34%	28%	33%	32%	24%	31%	18%	35%	23%	14%	31%	26%	28%	27%	31%	30%	30%	24%	32%	40%	27%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.17. Q11bi Click energy by Banner
Weight: Weight2; base n = from 1275 to 1503; total n = 1503; 228 missing

Banner

Q11bi Click energy	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulnerable	Not vulnerable	No	Yes	No	Yes	Urban location	Sub-urban location	Rural location	Up to £15,499	£15,500 - £39,999	£40,000+	Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment or PAYG meter	Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
1-Never heard of	56%↓	64%↓	74%	85%↑	72%	70%	80%↑	57%↓	71%↑	52%↓	66%	65%↓	76%↑	66%	70%	73%	76%↑	72%	72%	61%↓	77%	53%↓	77%↑	53%↓
2-Heard of	37%↑	32%↑	25%	14%↓	24%	27%	19%↓	38%↑	26%	37%	29%	32%↑	21%↓	29%	27%	25%	22%↓	25%	26%	34%↑	22%	43%↑	22%↓	40%↑
3-They are my current supplier	7%	4%	2%↓	2%	4%	3%	2%↓	6%↑	3%↓	11%↑	4%	3%	3%	6%	3%	2%	2%	3%	2%	5%↑	1%	5%	2%↓	7%↑
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.18. Q11bi Budget Energy by Banner
Weight: Weight2; base n = from 1275 to 1503; total n = 1503; 228 missing

Banner

Q11bi Budget Energy	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulnerable	Not vulnerable	No	Yes	No	Yes	Urban location	Sub-urban location	Rural location	Up to £15,499	£15,500 - £39,999	£40,000+	Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment or PAYG meter	Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
1-Never heard of	50%	42%↓	59%↑	68%↑	55%	53%	64%↑	38%↓	54%↑	39%↓	48%	46%↓	62%↑	45%↓	52%	61%↑	61%↑	65%↑	64%↑	32%↓	67%↑	47%	58%↑	27%↓
2-Heard of	37%	50%↑	36%↓	30%↓	40%	39%	33%↓	50%↑	39%	49%	44%	46%↑	33%↓	45%	41%	34%↓	35%↓	34%	28%↓	53%↑	31%↓	51%	36%↓	56%↑
3-They are my current supplier	13%↑	8%	6%	2%↓	5%↓	8%	3%↓	12%↑	7%	12%	8%	8%	5%	10%	7%	5%	3%↓	1%↓	8%	14%↑	2%↓	2%	6%	17%↑
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.19. Q11bi Electric Ireland by Banner
Weight: Weight2; base n = from 1275 to 1503; total n = 1503; 228 missing

Banner

	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
Q11bi Electric Ireland	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
1-Never heard of	36%	22%↓	24%	36%↑	31%↑	24%	34%↑	18%↓	27%	23%	26%	25%	31%	32%	26%	21%	28%	28%	37%↑	23%	30%	27%	28%	21%
2-Heard of	51%	63%	64%	53%↓	56%↓	63%	61%	58%	60%	66%	60%	63%	58%	54%	60%	69%↑	60%	59%	57%	61%	61%	62%	60%	58%
3-They are my current supplier	13%	15%	11%	11%	13%	13%	5%↓	24%↑	13%	11%	14%	13%	11%	14%	14%	10%	12%	13%	6%	16%	9%	12%	12%	21%↑
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Figure B.20. Q11bi SSE Airtricity by Banner
Weight: Weight2; base n = from 1275 to 1503; total n = 1503; 228 missing

Banner

	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
Q11bi SSE Airtricity	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
1-Never heard of	16%	7%↓	6%↓	19%↑	14%↑	8%	12%	8%	10%	14%	7%	11%	12%	14%↑	7%	8%	8%	12%	21%↑	7%↓	6%	15%	10%	8%
2-Heard of	59%	66%	64%	59%	60%	63%	64%	62%	63%	56%	61%	58%	68%↑	61%	65%	60%	61%	64%	65%	67%	57%	65%	67%↑	54%↓
3-They are my current supplier	25%	27%	30%	22%	26%	28%	24%	30%	27%	30%	32%	31%	20%↓	24%	28%	32%	31%↑	23%	13%↓	26%	37%↑	20%	23%↓	38%↑
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Figure B.21. Q11bi Power NI by Banner
Weight: Weight2; base n = from 1275 to 1503; total n = 1503; 228 missing

Banner

	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
Q11bi Power NI	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
1-Never heard of	12%↑	3%	2%↓	9%↑	7%↑	4%	5%	6%	5%	8%	5%	5%	5%	7%	4%	4%	4%	10%↑	6%	3%	7%	11%	5%	4%
2-Heard of	52%	59%	54%	48%↓	55%	54%	36%↓	80%↑	54%	68%	53%	61%↑	48%↓	54%	54%	60%	56%	53%	35%↓	60%↑	57%	62%	52%↓	66%↑
3-They are my current supplier	36%	38%	43%	42%	38%	42%	59%↑	14%↓	41%↑	24%↓	41%	34%↓	47%↑	39%	42%	36%	40%	37%	59%↑	37%	36%	27%	44%↑	31%↓
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Figure B.22. Q11bi Firmus Energy by Banner
Weight: Weight2; base n = from 1275 to 1503; total n = 1503; 228 missing

Banner

	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
Q11bi Firmus Energy	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
1-Never heard of	41%↑	26%	23%↓	41%↑	35%↑	24%↓	32%	27%	31%	15%	26%	27%	37%↑	36%↑	31%	18%↓	29%	31%	29%	31%	30%	22%	31%	20%↓
2-Heard of	53%↓	67%	72%↑	54%↓	58%↓	72%↑	64%	65%	65%	59%	67%	65%	60%	57%↓	64%	78%↑	66%	64%	66%	61%	63%	59%	68%	60%
3-They are my current supplier	6%	7%	5%	4%	7%	4%	4%↓	8%↑	5%↓	25%↑	7%	8%↑	2%↓	7%	5%	4%	5%	6%	5%	8%	7%	18%↑	1%↓	20%↑
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Figure B.23. Q11bii Click energy by Banner
Weight: Weight2; base n = from 360 to 412; total n = 1503; 1143 missing

	Banner																							
	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
Q11bii Click energy	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
NET: Top 2 box	22%	20%	17%	12%	18%	19%	11%	23%	18%	23%	21%	13%	21%	20%	21%	14%	16%	20%	20%	20%	20%	7%	21%	17%
NET: Bottom 2 box	49%	60%	68%	77%	65%	59%	72%↑	55%↓	63%	50%	59%	61%	67%	58%	57%	72%	67%	46%	68%	61%	65%	42%	69%	60%
1-Know very little about	35%	42%	52%	66%↑	46%	44%	59%↑	37%↓	48%	27%	43%	43%	52%	45%	38%	57%	51%	29%	43%	47%	46%	18%↓	54%	50%
2	13%	18%	15%	11%	19%	16%	13%	18%	15%	23%	15%	18%	15%	13%	20%	15%	16%	17%	24%	13%	19%	24%	15%	10%
3	30%	20%	15%	12%	17%	21%	17%	21%	19%	27%	20%	26%	13%	22%	21%	13%	17%	34%	12%	20%	15%	51%↑	10%↓	23%
4	5%	8%	10%	3%	7%	11%	6%	9%	8%	2%	9%	8%	6%	7%	10%	9%	7%	8%	10%	8%	10%	0%	8%	9%
5-Have good knowledge	16%	11%	6%	8%	11%	9%	5%	14%	10%	21%	12%	5%	15%	13%	12%	6%	9%	13%	10%	11%	9%	7%	13%	8%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.24. Q11bii Budget Energy by Banner
Weight: Weight2; base n = from 581 to 672; total n = 1503; 922 missing

	Banner																							
	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
Q11bii Budget Energy	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
NET: Top 2 box	33%	20%	23%	12%↓	20%	22%	9%↓	32%↑	22%	23%	22%	21%	23%	20%	26%	17%	17%	14%	25%	26%	21%	9%	19%	26%
NET: Bottom 2 box	38%	53%	61%	79%↑	58%	57%	75%↑	42%↓	58%	46%	57%	55%	59%	56%	50%	66%	64%	52%	54%	53%	59%	50%	64%↑	50%
1-Know very little about	21%	36%	46%	62%↑	41%	41%	55%↑	28%↓	42%↑	19%↓	40%	39%	42%	37%	34%	46%	47%	34%	38%	37%	36%	23%	48%↑	35%
2	17%	17%	15%	17%	18%	16%	20%	14%	16%	27%	18%	16%	17%	19%	16%	20%	17%	19%	16%	16%	22%	27%	16%	15%
3	29%	26%	16%	9%↓	21%	21%	16%↓	26%↑	21%	31%	21%	24%	18%	24%	24%	16%	19%	33%	21%	20%	21%	41%↑	17%	24%
4	12%	11%	12%	5%	10%	11%	4%↓	16%↑	10%	12%	12%	10%	9%	10%	12%	10%	10%	8%	6%	13%	13%	9%	8%	13%
5-Have good knowledge	21%	10%	11%	6%	11%	11%	6%↓	16%↑	11%	11%	9%	11%	14%	10%	14%	7%	7%	6%	19%	13%	8%	0%	11%	12%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.25. Q11bii Electric Ireland by Banner
Weight: Weight2; base n = from 937 to 1089; total n = 1503; 566 missing

	Banner																							
	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
Q11bii Electric Ireland	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
NET: Top 2 box	28%	19%	17%	20%	19%	20%	11%↓	28%↑	20%	15%	20%	21%	17%	20%	22%	15%	19%	17%	16%	22%	20%	13%	17%	21%
NET: Bottom 2 box	33%↓	56%	65%↑	66%↑	59%	56%	72%↑	42%↓	59%	48%	58%	49%↓	67%↑	55%	53%	65%↑	59%	50%	64%	58%	54%	39%↓	64%↑	47%↓
1-Know very little about	15%↓	35%	45%↑	55%↑	41%	36%	52%↑	25%↓	41%↑	17%↓	37%	33%↓	48%↑	41%	33%	41%	35%	34%	55%↑	39%	29%↓	23%	45%↑	36%
2	18%	21%	20%	12%↓	18%	19%	20%	17%	18%	31%	20%	16%	19%	14%	20%	24%	23%↑	16%	9%↓	19%	25%	15%	19%	12%
3	39%↑	25%	19%	14%↓	21%	24%	17%↓	29%↑	22%	37%	22%	31%↑	15%↓	25%	25%	20%	22%	32%↑	20%	20%	25%	49%↑	18%↓	32%↑
4	11%	7%	9%	12%	10%	9%	5%↓	13%↑	9%	9%	8%	11%	8%	9%	11%	6%	9%	9%	6%	10%	9%	13%	8%	10%
5-Have good knowledge	17%	12%	8%	8%	9%	12%	6%↓	15%↑	11%	7%	12%	10%	9%	11%	12%	9%	10%	9%	10%	13%	12%	0%	10%	10%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.26. Q11bii SSE Airtricity by Banner
Weight: Weight2; base n = from 1157 to 1343; total n = 1503; 346 missing

Q11bii SSE Airtricity	Banner: S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
NET: Top 2 box	37%	34%	31%	25%↓	29%	35%	26%↓	40%↑	32%	37%	34%	38%↑	25%↓	25%↓	36%	35%	34%	28%	24%	33%	42%↑	35%	28%↓	34%
NET: Bottom 2 box	32%↓	42%	50%	57%↑	51%↑	40%↓	55%↑	34%↓	47%↑	22%↓	43%	34%↓	59%↑	48%	44%	42%	44%	48%	55%	44%	36%↓	24%↓	54%↑	33%↓
1-Know very little about	17%↓	26%↓	34%↑	41%↑	33%↑	25%↓	37%↑	20%↓	31%↑	13%↓	26%	22%↓	40%↑	37%↑	26%	23%	28%	31%	41%↑	28%	19%↓	17%	37%↑	22%↓
2	15%	16%	15%	16%	18%	15%	17%	14%	16%	10%	16%	12%↓	19%↑	11%↓	17%	18%	16%	17%	15%	16%	17%	6%	17%	12%
3	31%	24%	20%	17%	20%	25%	20%	26%	21%↓	41%↑	23%	29%↑	16%↓	27%	20%	24%	22%	23%	21%	23%	22%	41%↑	19%↓	32%↑
4	21%	18%	16%	13%	15%	20%	14%↓	22%↑	17%	21%	19%	22%↑	11%↓	11%↓	21%↑	19%	19%	13%	13%	17%	22%	23%	14%↓	22%
5-Have good knowledge	16%	16%	14%	12%	14%	15%	12%↓	18%↑	15%	16%	15%	15%	14%	14%	15%	16%	15%	15%	11%	16%	20%	12%	14%	13%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.27. Q11bii Power NI by Banner
Weight: Weight2; base n = from 1217 to 1428; total n = 1503; 286 missing

Q11bii Power NI	Banner: S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
NET: Top 2 box	36%	40%	44%	44%	42%	40%	45%	37%	42%	33%	38%	41%	45%	37%	44%	43%	42%	37%	47%	43%	43%	29%	43%	40%
NET: Bottom 2 box	25%	34%	33%	34%	34%	32%	33%	32%	34%	20%	34%	32%	32%	35%	29%	36%	34%	31%	28%	33%	32%	31%	35%	28%
1-Know very little about	15%	22%	18%	24%	21%	20%	22%	18%	21%	7%	22%	19%	20%	24%	15%↓	22%	19%	20%	21%	21%	16%	23%	23%	16%
2	11%	12%	15%	10%	13%	12%	11%	14%	13%	13%	12%	13%	12%	11%	13%	14%	14%	11%	7%	12%	17%	8%	13%	12%
3	39%↑	25%	23%	22%	24%	28%	22%↓	31%↑	24%↓	47%↑	28%	27%	22%	28%	27%	22%	25%	32%	25%	24%	25%	39%	22%	31%
4	17%	19%	20%	20%	19%	19%	20%	18%	19%	21%	18%	19%	21%	13%↓	22%	22%	24%↑	16%	16%	18%	22%	14%	19%	20%
5-Have good knowledge	19%	22%	24%	25%	23%	21%	25%	19%	23%	12%	20%	22%	25%	24%	22%	21%	18%↓	22%	30%	25%	22%	16%	23%	20%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.28. Q11bii Firmus Energy by Banner
Weight: Weight2; base n = from 914 to 1052; total n = 1503; 589 missing

Q11bii Firmus Energy	Banner: S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
NET: Top 2 box	12%	16%↑	10%	9%	10%	12%	10%	15%	11%↓	25%↑	12%	13%	11%	11%	13%	11%	11%	14%	10%	14%	11%	31%↑	8%↓	20%↑
NET: Bottom 2 box	52%	62%	72%↑	75%↑	68%	66%	72%↑	60%↓	69%↑	38%↓	67%	62%	72%	60%	65%	72%	69%	62%	69%	64%	63%	40%↓	76%↑	50%↓
1-Know very little about	32%↓	41%↓	57%↑	58%↑	49%	48%	52%↑	44%↓	51%↑	12%↓	47%	41%↓	58%↑	48%	45%	49%	47%	51%	48%	49%	38%↓	27%↓	59%↑	31%↓
2	20%	21%	15%	17%	19%	18%	20%	16%	18%	26%	21%	21%	14%↓	12%↓	19%	22%	23%↑	11%↓	21%	15%	26%↑	13%	17%	19%
3	36%↑	22%	18%	16%	22%	22%	18%↓	25%↑	20%↓	36%↑	21%	25%	17%	29%	22%	18%	20%	24%	21%	23%	25%	29%	16%↓	30%↑
4	8%	8%	6%	4%	5%	8%	7%	7%	6%↓	16%↑	7%	7%	6%	6%	7%	7%	6%	8%	5%	7%	5%	18%↑	5%↓	10%
5-Have good knowledge	4%	8%↑	3%↓	5%	5%	4%	3%↓	8%↑	5%	10%	5%	6%	5%	5%	6%	4%	5%	6%	5%	6%	6%	13%	3%↓	10%↑
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.29. Cost of electricity and gas by Banner
Weight: Weight2; base n = from 1275 to 1503; total n = 1503; 228 missing

	Banner																							
	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
Cost of electricity and gas	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Improved	13%	17%	13%	13%	14%	15%	11%↓	18%↑	14%	18%	14%	13%	14%	11%	13%	20%↑	15%	16%	10%	12%	13%	18%	14%	9%
No change	32%	28%	32%	34%	32%	31%	32%	29%	30%	43%	28%	36%	28%	29%	32%	34%	32%	31%	38%	28%	33%	26%	29%	29%
Been made worse	41%	47%	47%	44%	45%	44%	46%	45%	47%	31%	46%	42%	50%	49%	47%	37%↓	44%	43%	40%	52%	43%	52%	48%	50%
Don't know	14%	8%	8%	10%	9%	9%	10%	8%	9%	9%	12%	10%	7%	11%	7%	8%	9%	10%	12%	8%	11%	5%	9%	12%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.30. Service provided by Banner
Weight: Weight2; base n = from 1275 to 1503; total n = 1503; 228 missing

	Banner																							
	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
Service provided	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Improved	25%	21%	20%	20%	21%	20%	20%	22%	21%	20%	20%	20%	22%	18%	21%	24%	22%	23%	14%	20%	21%	25%	20%	18%
No change	47%↓	63%	67%	70%	62%	65%	64%	62%	63%	66%	62%	62%	65%	61%	64%	61%	64%	62%	63%	64%	64%	53%	66%	61%
Been made worse	16%↑	8%	6%	2%↓	8%	6%	5%	10%	7%	10%	7%	9%	6%	11%	7%	6%	6%	9%	12%	6%	6%	16%	6%	8%
Don't know	12%	9%	8%	8%	9%	9%	10%	7%	9%	5%	11%	9%	7%	10%	7%	8%	8%	7%	11%	9%	8%	6%	8%	13%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.31. Tariff options available by Banner
Weight: Weight2; base n = from 1275 to 1503; total n = 1503; 228 missing

	Banner																							
	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
Tariff options available	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Improved	22%	25%	22%	21%	22%	24%	18%↓	30%↑	23%	32%	23%	27%	20%	19%	23%	32%↑	27%	21%	18%	21%	24%	21%	24%	20%
No change	41%	45%	49%	46%	45%	47%	51%↑	39%↓	46%	46%	45%	41%	50%	45%	48%	42%	44%	46%	49%	48%	48%	41%	46%	48%
Been made worse	22%	17%	12%	11%	15%	14%	12%↓	19%↑	15%	13%	17%	17%	12%↓	19%	16%	9%↓	11%	16%	16%	18%	11%	28%↑	13%	18%
Don't know	14%	13%	17%	22%↑	17%	15%	19%↑	12%↓	16%	9%	16%	15%	18%	18%	13%	16%	17%	17%	17%	13%	17%	10%	17%	14%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.32. Responsiveness of suppliers to customer needs by Banner
Weight: Weight2; base n = from 1275 to 1503; total n = 1503; 228 missing

	Banner																							
	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
Responsi-veness of suppliers to customer needs	18-24	25-44	45-64	65+	Vulne-rable	Not vulne-rable	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly direct debit	Quart-erly direct debit	Cheq-ue, ca-sh or card	Prepa-yment or PA-YG meter	Mont-hly direct debit	Quart-erly direct debit	Cheq-ue, ca-sh or card	Prepa-yment or PA-YG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Improved	28%	21%	18%	22%	22%	21%	20%	22%	21%	27%	25%	19%	20%	19%	24%	22%	23%	18%	17%	21%	26%	20%	19%	22%
No change	42%	58%	62%	57%	54%	60%	58%	56%	57%	50%	52%	56%	61%	54%	57%	58%	58%	58%	57%	56%	53%	48%	61%	51%
Been made worse	14%	9%	7%	4%	9%	6%	6%	11%	8%	11%	7%	9%	7%	12%	7%	6%	6%	12%	10%	8%	5%	16%	7%	11%
Don't know	15%	13%	13%	17%	15%	14%	16%	12%	14%	11%	16%	16%	11%	15%	12%	15%	13%	13%	16%	15%	15%	16%	14%	16%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.33. Suppliers which suit individual needs by Banner
Weight: Weight2; base n = from 1275 to 1503; total n = 1503; 228 missing

Suppliers which suit individual needs	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Improved	19%	21%	17%	14%	18%	17%	15%↓	22%↑	18%	24%	20%	18%	16%	13%	18%	26%↑	19%	17%	15%	18%	20%	18%	16%	17%
No change	51%	56%	62%	61%	57%	60%	60%	56%	58%	56%	56%	57%	61%	59%	58%	54%	60%	55%	59%	58%	58%	52%	60%	56%
Been made worse	21%↑	10%	6%	5%↓	9%	8%	8%	10%	9%	10%	8%	10%	8%	11%	10%	7%	7%	13%	11%	9%	7%	21%	9%	10%
Don't know	9%	14%	15%	20%↑	16%	14%	17%	12%	15%	11%	16%	15%	14%	17%	13%	14%	14%	15%	15%	15%	15%	9%	15%	17%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.34. Q12a Electricity: How easy or difficult do you believe it is to compare different deals for…? by Banner
Weight: Weight2; base n = from 1275 to 1503; total n = 1503; 228 missing

Q12a How easy or difficult do you believe it is to compare different deals for…? Electricity	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
NET: Difficult 1 + 2	19%	26%	28%	32%	30%	23%	29%	24%	27%	27%	29%	24%	29%	28%	23%	32%	32%↑	24%	31%	21%↓	31%	24%	28%	22%
NET: Easy 4 + 5	38%	36%	35%	33%	33%	38%	30%↓	43%↑	35%	34%	35%	35%	35%	32%	40%	34%	34%	32%	29%	42%↑	33%	26%	34%	40%
1-Very difficult	9%	12%	14%	18%↑	16%↑	10%	16%↑	10%↓	14%	5%	15%	9%↓	15%	14%	9%↓	16%	15%	13%	16%	11%	14%	10%	15%	12%
2	9%	14%	15%	13%	13%	13%	13%	14%	13%	22%	14%	15%	13%	14%	14%	16%	17%↑	11%	15%	10%	17%	14%	13%	10%
3	34%	30%	29%	23%	28%	29%	28%	30%	28%	35%	27%	30%	28%	29%	28%	29%	28%	32%	29%	28%	32%	41%	28%	28%
4	21%	20%	18%	17%	18%	20%	17%	22%	19%	19%	14%	22%	21%	17%	21%	22%	20%	22%	11%↓	20%	21%	20%	19%	17%
5-Very easy	16%	16%	17%	15%	15%	18%	13%↓	21%↑	16%	14%	21%	14%	14%	15%	19%	12%	14%	10%↓	18%	21%↑	12%	5%	15%	23%↑
Don't know	9%	8%	8%	13%	9%	9%	13%↑	4%↓	9%	4%	10%	10%	8%	12%	8%	5%	7%	11%	11%	10%	4%↓	9%	10%	10%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.35. Q12a Gas: How easy or difficult do you believe it is to compare different deals for…? by Banner
Weight: Weight2; base n = from 1275 to 1503; total n = 1503; 228 missing

Q12a How easy or difficult do you believe it is to compare different deals for…? Gas	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
NET: Difficult 1 + 2	21%	20%	22%	24%	23%	21%	24%↑	18%↓	21%	27%	30%↑	21%	18%↓	27%↑	19%	22%	21%	25%	27%	17%↓	32%↑	22%	18%↓	27%
NET: 4 + 5 Easy	33%↑	21%	15%↓	13%↓	18%	21%	16%↓	24%↑	18%↓	37%↑	22%	23%	13%↓	19%	22%	19%	19%	19%	17%	21%	18%	25%	13%↓	33%↑
1-Very difficult	8%	12%	12%	15%	13%	12%	13%	10%	12%	10%	16%↑	9%↓	12%	15%	9%↓	12%	11%	13%	17%	11%	16%	5%	12%	16%
2	13%	8%	10%	10%	10%	9%	11%	8%	9%↓	18%↑	14%↑	12%	6%↓	11%	9%	10%	10%	12%	10%	7%	16%↑	17%	7%↓	11%
3	28%↑	19%	17%	12%↓	18%	19%	16%	21%	17%↓	31%↑	18%	23%↑	16%	17%	20%	16%	17%	19%	18%	20%	26%↑	35%↑	15%↓	23%
4	18%↑	11%	8%	4%↓	8%↓	13%↑	8%↓	13%↑	9%	19%	7%	14%↑	7%	10%	10%	13%	11%	11%	8%	9%	11%	22%↑	6%↓	12%
5-Very easy	15%	9%	8%	8%	10%	8%	8%	11%	9%↓	18%↑	15%↑	9%	6%↓	9%	12%	7%	8%	8%	9%	12%	7%	3%	6%↓	20%↑
Don't know	18%↓	40%	46%↑	51%↑	42%	39%	44%↑	37%↓	43%↑	4%↓	30%↓	34%↓	53%↑	37%	39%	43%	43%	37%	38%	42%	24%↓	17%↓	54%↑	17%↓
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.36. Q13r1 Gas supplier: How many times, if at all, have you ever switched your supplier? by Banner
Weight: Weight2; base n = from 313 to 358; total n = 1503; 1190 missing

Banner

Q13r1: Gas supplier - How many times, if at all, have you ever switched your supplier?	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Never	48%	66%	66%	68%	60%	69%	75%↑	50%↓	81%↑	0%↓	66%	63%	53%	54%	60%	71%	65%	45%↓	81%	66%	61%	47%	71%	68%
Once	28%	17%	22%	23%	24%	17%	15%↓	29%↑	11%↓	60%↑	23%	21%	22%	24%	25%	18%	28%	16%	12%	20%	26%	20%	15%	19%
2 or 3 times	17%	14%	10%	6%	11%	12%	7%↓	18%↑	5%↓	37%↑	8%	13%	25%	15%	13%	10%	5%↓	32%↑	7%	12%	10%	33%↑	3%	10%
4 or more times	3%	2%	1%	1%	2%	1%	1%	3%	1%	4%	2%	2%	0%	5%	1%	1%	1%	4%	0%	2%	1%	0%	9%↑	1%
Don't know	3%	1%	0%	2%	3%	0%	2%	0%	2%	0%	1%	2%	0%	3%	0%	0%	1%	4%	0%	0%	1%	0%	2%	1%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.37. Q13r2 Electricity supplier: How many times, if at all, have you ever switched your supplier? by Banner
Weight: Weight2; base n = from 1275 to 1503; total n = 1503; 228 missing

Banner

Q13r2: Electricity supplier - How many times, if at all, have you ever switched your supplier?	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Never	32%	31%↓	45%↑	52%↑	41%	38%	68%↑	0%↓	42%↑	8%↓	39%	34%↓	46%↑	38%	39%	36%	39%	41%	61%↑	34%↓	39%	27%	43%	36%
Once	27%	31%	26%	23%	27%	28%	22%↓	35%↑	26%↓	42%↑	27%	29%	26%	25%	28%	30%	29%	28%	17%↓	26%	32%	33%	27%	25%
2 or 3 times	35%	29%	23%	22%	26%	27%	7%↓	54%↑	25%↓	49%↑	27%	30%	22%↓	29%	25%	29%	26%	26%	18%	31%↑	22%	34%	24%	29%
4 or more times	2%	7%	6%	3%	6%	5%	2%↓	11%↑	6%	2%	6%	6%	5%	4%	7%	4%	6%	3%	4%	7%	6%	6%	5%	7%
Don't know	4%↑	1%	1%	0%	1%	2%	2%↑	0%↓	1%	0%	2%	1%	1%	3%↑	0%↓	0%	1%	2%	0%	2%	1%	0%	1%	3%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.38. Q14 Gas supplier: When was the last time you switched your supplier? by Banner
Weight: Weight2; base n = from 113 to 121; total n = 1503; 1390 missing

Banner

Q14 When was the last time you switched your supplier? Gas supplier	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Under 1 year ago	0%	15%	14%	0%	4%	9%	4%	11%	0%	14%	6%	10%	12%	10%	7%	14%	11%	4%	0%	11%	9%	4%	0%	12%
1-2 years ago	36%	24%	30%	14%	25%	30%	8%↓	37%↑	0%↓	44%↑	31%	26%	20%	23%	32%	25%	32%	19%	35%	25%	32%	17%	37%	26%
2 -3 years ago	29%	37%	11%	17%	25%	27%	10%	33%	0%↓	42%↑	22%	23%	48%	26%	25%	28%	16%	42%	54%	21%	19%	51%	22%	20%
3 years ago or more	29%	22%	42%	62%↑	42%	32%	70%↑	16%↓	89%↑	0%↓	38%	36%	16%	33%	36%	29%	41%	25%	11%	37%	39%	15%	41%	39%
Not sure	7%	2%	3%	7%	4%	2%	8%	3%	11%	0%	3%	4%	4%	8%	0%	5%	0%	11%	0%	5%	0%	13%	0%	3%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.39. Q14 Electricity supplier: When was the last time you switched your supplier? by Banner
Weight: Weight2; base n = from 755 to 860; total n = 1503; 748 missing

Banner

Q14 When was the last time you switched your supplier? Electricity supplier	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Under 1 year ago	16%	25%	26%	23%	22%	22%	0%↓	34%↑	24%	24%	24%	28%	18%↓	20%	23%	26%	29%↑	13%↓	16%	27%	30%	6%↓	23%	27%
1-2 years ago	29%	29%	20%	22%	26%	24%	0%↓	36%↑	25%	29%	23%	26%	27%	25%	26%	23%	22%	20%	32%	31%↑	26%	17%	24%	33%
2 -3 years ago	27%	24%	18%	16%	22%	22%	0%↓	30%↑	19%↓	41%↑	20%	21%	22%	27%	22%	17%	17%	34%↑	27%	19%	19%	46%↑	20%	16%
3 years ago or more	24%	23%↓	36%↑	38%↑	29%	31%	97%↑	0%↓	31%↑	6%↓	32%	24%	32%	26%	29%	32%	32%	31%	23%	22%↓	26%	24%	33%	24%
Not sure	4%↑	0%	0%	1%	1%	1%	3%↑	0%↓	1%	0%	0%	1%	1%	1%	0%	2%	0%	2%	1%	1%	0%	7%↑	1%	0%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.40. Q14a: Thinking of the last time you switched supplier (or more recently compared suppliers/tariffs), what were your main reasons for doing so? by Banner
Weight: Weight2; base n = from 766 to 871; total n = 1503; 737 missing

Q14a. Thinking of the last time you switched supplier (or more recently compared suppliers/tariffs), what were your main reasons for doing so?	Banner																							
	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Felt I was overpaying	40%	53%	53%	48%	47%	51%	53%	49%	52%	37%	50%	43%	55%	47%	46%	57%	56%	46%	33%	50%	49%	43%	55%	42%
Saw a promotional offer with another supplier	39%	59%	57%	53%	55%	52%	49%	56%	55%	50%	60%	53%	49%	44%	59%	56%	52%	49%	51%	60%	50%	42%	55%	64%
Advised to by family or friends	28%	16%	9%	8%	15%	16%	12%	15%	13%	29%	19%	13%	13%	19%	15%	8%	11%	20%	22%	15%	16%	31%	12%	16%
Saw a media advertisement (e.g. TV advert) for another supplier	9%	12%	8%	8%	10%	8%	13%	8%	9%	13%	6%	9%	11%	6%	9%	13%	10%	15%	8%	7%	9%	16%	8%	8%
Experienced poor customer service	7%	5%	8%	6%	7%	6%	8%	6%	7%	3%	5%	7%	6%	3%	8%	6%	8%	5%	7%	5%	8%	8%	6%	4%
Other (please specify)	2%	8%	16%	20%	13%	8%	11%	12%	12%	10%	12%	10%	13%	13%	8%	14%	15%	10%	9%	8%	14%	8%	14%	5%
Not sure	2%	0%	1%	2%	1%	1%	2%	0%	1%	0%	0%	2%	0%	2%	0%	0%	1%	2%	1%	0%	1%	4%	1%	0%
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Figure B.41. Q14b Gas supplier: How did you switch from your previous…? by Banner
Weight: Weight2; base n = from 113 to 121; total n = 1503; 1390 missing

Q14b How did you switch from your previous… Gas supplier?	Banner																							
	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulne-rable	Not vulne-rable	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly direct debit	Quart-erly direct debit	Cheq-ue, ca-sh or card	Prepa-yment or PA-YG meter	Mont-hly direct debit	Quart-erly direct debit	Cheq-ue, ca-sh or card	Prepa-yment or PA-YG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Via the telephone	36%	17%	33%	35%	29%	29%	37%	24%	30%	27%	33%	31%	17%	30%	33%	17%	42%	10%	0%	30%	37%	9%	11%	35%
Via the internet	50%	41%	11%	17%	28%	42%	23%	37%	24%	38%	28%	34%	49%	28%	34%	45%	33%	51%	53%	17%	37%	47%	56%	16%
Via a doorstop seller	7%	39%	36%	27%	35%	22%	26%	30%	29%	29%	33%	24%	22%	23%	28%	35%	22%	24%	47%	38%	24%	32%	18%	35%
Other (please specify)	0%	0%	11%	3%	2%	4%	3%	3%	3%	3%	2%	2%	9%	4%	1%	4%	0%	6%	0%	6%	0%	3%	8%	5%
Cannot remember	7%	2%	8%	17%	6%	4%	10%	6%	14%	3%	5%	10%	4%	15%	2%	0%	3%	10%	0%	10%	3%	9%	7%	8%
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Figure B.42. Q14b Electricity supplier: How did you switch from your previous… by Banner
Weight: Weight2; base n = from 755 to 860; total n = 1503; 748 missing

Q14b How did you switch from your previous... Electricity supplier	Banner																							
	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Via the telephone	27%	28%	30%	22%	26%	29%	33%	25%	27%	27%	32%	21%	31%	27%	26%	29%	26%	23%	35%	28%	29%	16%	28%	28%
Via the internet	40%	25%	16%	9%	20%	24%	18%	24%	21%	34%	20%	23%	22%	19%	27%	23%	24%	27%	22%	19%	23%	44%	17%	15%
Via a doorstop seller	31%	40%	42%	56%	45%	39%	36%	44%	42%	37%	39%	50%	33%	44%	38%	40%	41%	39%	36%	45%	43%	32%	44%	48%
Other (please specify)	0%	5%	10%	12%	7%	7%	7%	7%	7%	2%	6%	4%	11%	7%	8%	5%	6%	6%	6%	7%	4%	3%	9%	9%
Cannot remember	2%	2%	3%	2%	2%	2%	6%	1%	3%	0%	2%	3%	1%	3%	1%	2%	3%	4%	1%	1%	1%	4%	2%	1%
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Figure B.43. Q14c Gas supplier: Compared to your previous supplier, are you now paying more, less or the same? by Banner
Weight: Weight2; base n = from 113 to 121; total n = 1503; 1390 missing

Q14c Compared to your previous supplier, are you now paying more, less or the same? Gas supplier	Banner: S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulne-rable	Not vulne-rable	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly direct debit	Quart-erly direct debit	Cheq-ue, ca-sh or card	Prepa-yment or PA-YG meter	Mont-hly direct debit	Quart-erly direct debit	Cheq-ue, ca-sh or card	Prepa-yment or PA-YG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
NET: less	50%	34%	36%	45%	41%	44%	48%	36%	39%	41%	38%	46%	30%	34%	48%	37%	42%	39%	35%	41%	43%	37%	29%	43%
NET: More	7%	24%	14%	14%	17%	13%	11%	18%	16%	16%	19%	13%	16%	13%	13%	27%	21%	16%	36%	9%	24%	13%	38%	6%
Significantly less	7%	7%	0%	3%	4%	3%	7%	4%	1%	7%	8%	4%	0%	5%	8%	0%	4%	4%	0%	8%	5%	0%	7%	7%
Slightly less	43%	27%	36%	41%	37%	42%	41%	32%	38%	34%	30%	42%	30%	30%	40%	37%	38%	35%	35%	34%	38%	37%	22%	36%
Similar amount	36%	34%	36%	31%	33%	35%	26%	39%	28%	39%	36%	29%	49%	42%	32%	24%	28%	32%	29%	41%	22%	37%	33%	45%
Slightly more	0%	15%	6%	3%	6%	6%	3%	9%	7%	7%	9%	7%	6%	5%	9%	9%	3%	7%	36%	7%	6%	9%	22%	4%
Significantly more	7%	10%	8%	10%	11%	7%	8%	9%	8%	9%	10%	6%	10%	8%	4%	19%	17%	9%	0%	2%	18%	4%	15%	1%
Not sure	7%	7%	14%	10%	9%	7%	15%	7%	18%	4%	7%	12%	5%	11%	7%	12%	9%	13%	0%	9%	11%	12%	0%	7%
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Figure B.44. Q14c Electricity supplier: Compared to your previous supplier, are you now paying more, less or the same? by Banner
Weight: Weight2; base n = from 755 to 860; total n = 1503; 748 missing

Q14c Compared to your previous supplier, are you now paying more, less or the same? Electricity supplier	Banner: S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
NET: Less	54%	49%	51%	46%	48%	52%	43%	53%	50%	49%	47%	50%	51%	43%	53%	54%	54%	45%	39%	48%	54%	42%	51%	41%
Net: More	9%	16%	13%	12%	13%	13%	15%	13%	13%	15%	13%	13%	13%	13%	11%	13%	14%	10%	14%	16%	15%	4%	14%	14%
Significantly less	7%	8%	6%	9%	8%	7%	7%	8%	7%	14%	7%	8%	8%	10%	8%	4%	10%	5%	4%	6%	10%	7%	7%	4%
Slightly less	47%	41%	44%	37%	40%	45%	36%	45%	43%	35%	40%	42%	43%	32%*	45%	49%	44%	39%	35%	43%	43%	35%	44%	37%
Similar amount	35%	30%	25%	32%	32%	28%	28%	30%	29%	34%	34%	29%	29%	38%	29%	25%	22%*	35%	43%	33%	22%	42%	28%	39%
Slightly more	7%	10%	10%	6%	8%	10%	9%	9%	9%	10%	9%	9%	7%	9%	8%	9%	10%	5%	12%	9%	9%	2%	9%	11%
Significantly more	2%	6%	3%	6%	5%	3%	6%	4%	5%	5%	3%	4%	7%	4%	3%	5%	4%	5%	2%	6%	5%	2%	6%	3%
Not sure	2%	5%	11%↑	11%	8%	7%	14%↑	4%↓	7%	3%	6%	8%	6%	6%	6%	8%	10%	10%	4%	3%*	9%	12%	6%	6%
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Figure B.45. Q14d Gas supplier: Overall, was the experience of switching suppliers positive, negative or indifferent? by Banner
Weight: Weight2; base n = from 113 to 121; total n = 1503; 1390 missing

Q14d Overall, was the experience of switching suppliers positive, negative or indifferent? Gas supplier	Banner: S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
NET: Negative	28%	2%	11%	3%	12%	13%	12%	10%	9%	12%	8%	7%	34%	28%	5%	0%	10%	31%	0%	0%	11%	25%	8%	4%
NET: Positive	43%	54%	67%	72%	60%	48%	66%	52%	60%	55%	67%	57%	25%	43%	69%	58%	60%	31%	53%	75%	57%	40%	40%	72%
1-Very negative	7%	0%	6%	0%	3%	4%	4%	3%	2%	4%	6%	0%	5%	10%	0%	0%	7%	3%	0%	0%	5%	0%	8%	2%
2	21%	2%	6%	3%	9%	9%	8%	8%	8%	8%	2%	7%	30%	18%	5%	0%	3%	28%↑	0%	0%	6%	25%	0%	2%
3	22%	34%	14%	14%	20%	31%	13%	28%	17%	27%	21%	24%	28%	11%	23%	42%	30%	31%	36%	8%	30%	26%	51%	9%
4	14%	34%	33%	31%	30%	30%	37%	24%	33%	26%	36%	28%	0%	22%	30%	40%	34%	21%	53%	26%	31%	35%	22%	25%
5-Very positive	29%	20%	33%	41%	30%	18%	30%	28%	27%	29%	30%	29%	25%	21%	39%	17%	27%	10%	0%	49%	26%	4%	18%	47%
Cannot remember	7%	10%	8%	10%	7%	7%	9%	9%	14%	6%	4%	12%	12%	18%	3%	0%	0%	7%	11%	17%	2%	9%	0%	15%
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Figure B.46. Q14d Electricity supplier: Overall, was the experience of switching suppliers positive, negative or indifferent? by Banner
Weight: Weight2; base n = from 755 to 860; total n = 1503; 748 missing

Q14d Overall, was the experience of switching suppliers positive, negative or indifferent? Electricity supplier	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Net: Negaitve	11%	7%	8%	9%	9%	10%	9%	8%	8%	14%	9%	7%	10%	10%	9%	5%	8%	10%	13%	7%	4%	15%	9%	5%
NET: Positive	44%↓	61%	68%	74%↑	64%	59%	62%	63%	64%	45%	63%	63%	61%	62%	63%	64%	67%	49%↓	52%	67%	62%	30%↓	65%	73%
1-Very negative	0%	4%	3%	3%	3%	4%	4%	3%	3%	3%	2%	3%	5%	3%	3%	4%	4%	4%	1%	2%	2%	4%	3%	1%
2	11%	3%	5%	7%	6%	6%	5%	6%	5%	10%	7%	4%	5%	8%	6%	2%↓	4%	6%	12%	4%	2%	10%	6%	4%
3	42%	31%	22%	15%↓	27%	30%	27%	28%	26%	38%	27%	26%	28%	24%	27%	29%	24%	36%	36%	24%	33%	49%↑	24%	20%
4	27%	31%	28%	35%	34%	24%	33%	29%	31%	21%	30%	34%	26%	30%	29%	33%	36%	29%	21%	27%	31%	22%	31%	33%
5-Very positive	16%	29%	40%↑	38%	30%	34%	29%	33%	33%	24%	34%	28%	36%	32%	34%	30%	31%	20%↓	31%	40%↑	31%	7%↓	34%	40%
Cannot remember	4%	2%	1%	2%	1%	2%	3%	1%	2%	3%	0%	4%↑	0%	4%	0%	2%	1%	5%	0%	2%	2%	7%	1%	3%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.47. Q15 Gas supplier: Why have you never switched your… by Banner
Weight: Weight2; base n = from 197 to 233; total n = 1503; 1306 missing

Q15- Why have you never switched your... Gas supplier	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulne-rable	Not vulne-rable	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly direct debit	Quart-erly direct debit	Cheq-ue, ca-sh or card	Prepa-yment or PA-YG meter	Mont-hly direct debit	Quart-erly direct debit	Cheq-ue, ca-sh or card	Prepa-yment or PA-YG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Didn't realise I could switch	43%	27%	15%	6%	23%	24%	22%	22%	22%	NaN	27%	18%	15%	37%	19%	19%	21%	6%	18%	29%	19%	23%	11%	27%
Happy with current service	28%	49%	37%	57%	46%	41%	51%	34%	45%	NaN	43%	46%	52%	34%	49%	49%	52%	38%	55%	36%	53%	45%	50%	37%
Feel I am on the cheapest option	36%	11%	10%	8%	9%	19%	12%	17%	13%	NaN	13%	15%	0%	16%	11%	14%	6%	26%	23%	14%	5%	31%	24%	13%
Reputation of the supplier is better than other suppliers	0%	9%	4%	9%	7%	6%	6%	7%	6%	NaN	8%	6%	0%	8%	4%	6%	6%	10%	3%	7%	7%	9%	10%	4%
Wouldn't know how to	14%	18%	13%	12%	14%	13%	17%	11%	15%	NaN	19%	17%	0%	22%	16%	5%	9%	16%	13%	23%	9%	23%	5%	20%
Other (please specify)	0%	17%	32%	30%	20%	22%	18%	27%	21%	NaN	19%	20%	34%	12%	21%	31%	25%	24%	25%	12%	32%	12%	16%	17%
Not sure	0%	1%	4%	3%	3%	2%	3%	2%	2%	NaN	2%	3%	0%	2%	2%	0%	4%	0%	0%	2%	5%	0%	0%	2%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**NaN**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.48. Q15 Electricity supplier: Why have you never switched your… by Banner
Weight: Weight2; base n = from 510 to 630; total n = 1503; 993 missing

Q15 - Why have you never switched your... Electricity supplier	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Didn't realise I could switch	26%↑	9%	7%	4%	10%	8%	9%	NaN	9%	0%	19%↑	6%	6%	9%	11%	8%	8%	4%	10%	13%	8%	17%	6%	17%
Happy with current service	59%	50%	57%	67%↑	62%	57%	57%	NaN	57%	81%	59%	61%	55%	59%	58%	57%	60%	59%	59%	52%	67%	49%	55%	59%
Feel I am on the cheapest option	19%	12%	10%	12%	12%	11%	12%	NaN	11%	52%	11%	14%	11%	12%	15%	8%	10%	9%	15%	14%	9%	21%	11%	19%
Reputation of the supplier is better than other suppliers	0%↓	16%	18%	21%	17%	15%	16%	NaN	17%	0%	14%	16%	18%	16%	19%	10%	17%	18%	17%	14%	10%	14%	19%	12%
Wouldn't know how to	11%	12%	13%	17%	16%	12%	14%	NaN	14%	19%	12%	20%	12%	20%↑	11%	8%	12%	19%	12%	14%	12%	34%	13%	15%
Other (please specify)	0%↓	22%	24%	25%	19%	19%	21%	NaN	21%	0%	18%	13%↓	29%↑	20%	21%	26%	27%	17%	18%	17%	16%	6%	27%↑	8%↓
Not sure	4%	5%	5%	1%	4%	6%	4%	NaN	4%	0%	4%	5%	2%	5%	5%	2%	4%	4%	5%	4%	5%	6%	4%	4%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**NaN**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.49. Q16 Gas supplier: How likely are you to switch suppliers in the next 12 months? by Banner
Weight: Weight2; base n = from 313 to 358; total n = 1503; 1190 missing

Q16 How likely are you to switch suppliers in the next 12 months? Gas supplier	Banner																							
	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
NET: Not likely	38%	44%	58%	67%↑	51%	53%	63%↑	36%↓	57%↑	26%↓	46%	55%	49%	43%	53%	50%	54%	38%	66%	49%	54%	23%↓	56%	56%
NET: Likely	24%	23%	19%	11%	21%	20%	15%	26%	17%	32%	24%	17%	16%	24%	21%	18%	21%	25%	14%	19%	22%	28%	20%	16%
1-Not at all likely	28%	32%	48%	56%↑	39%	42%	50%↑	28%↓	45%↑	20%↓	36%	43%	42%	37%	44%	32%	37%	35%	48%	43%	40%	19%	45%	45%
2	10%	11%	10%	11%	12%	11%	13%	8%	12%	6%	10%	13%	7%	6%	9%	18%	17%	4%	18%	6%	14%	4%	11%	11%
3	21%	27%	15%	12%	19%	21%	14%↓	28%↑	16%↓	36%↑	23%	15%	27%	19%	20%	26%	19%	28%	10%	20%	18%	42%↑	12%	18%
4	21%	11%	8%	8%	11%	15%	9%	15%	10%	18%	13%	10%	12%	15%	10%	12%	14%	16%	10%	7%	12%	19%	17%	7%
5-Very likely	3%	12%	10%	3%	10%	5%	6%	12%	7%	14%	11%	6%	4%	10%	11%	5%	7%	8%	3%	12%	10%	9%	3%	9%
Don't know	17%	6%	8%	9%	9%	6%	8%	11%	10%	6%	7%	13%	7%	13%	7%	6%	6%	9%	10%	12%	6%	7%	12%	11%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.50. Q16 Electricity supplier: How likely are you to switch suppliers in the next 12 months? by Banner
Weight: Weight2; base n = from 1275 to 1503; total n = 1503; 228 missing

Q16 How likely are you to switch suppliers in the next 12 months? Electricity supplier	Banner																							
	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
NET: Not likely	41%	39%↓	57%↑	70%↑	54%	51%	64%↑	32%↓	52%↑	27%↓	46%	47%	58%↑	50%	47%	50%	53%	48%	60%	47%	57%	25%↓	55%	46%
NET: Likely	27%	30%↑	20%	13%↓	21%	23%	14%↓	36%↑	23%	33%	27%	23%	21%	23%	24%	27%	22%	23%	16%	27%	20%	28%	22%	26%
1-Not at all likely	23%↓	29%↓	48%↑	63%↑	45%↑	38%	52%↑	24%↓	42%↑	18%↓	36%	35%↓	49%↑	41%	36%	38%	40%	43%	51%↑	37%	41%	17%↓	46%↑	37%
2	18%↑	10%	9%	7%	8%	13%	12%↑	8%↓	10%	9%	10%	12%	9%	9%	11%	12%	13%↑	5%↓	8%	10%	15%↑	9%	9%	8%
3	24%	26%↑	17%↓	14%↓	19%	21%	15%↓	28%↑	20%↓	35%↑	22%	22%	19%	18%	25%	20%	20%	23%	20%	21%	17%	36%↑	20%	21%
4	18%↑	12%	8%	7%↓	10%	11%	8%↓	14%↑	10%	18%	11%	12%	9%	11%	10%	13%	11%	12%	7%	10%	9%	16%	10%	10%
5-Very likely	9%	19%↑	12%	6%↓	11%	12%	7%↓	22%↑	13%	16%	16%	10%	12%	12%	14%	14%	11%	11%	8%	17%↑	11%	12%	12%	15%
Don't know	8%	5%	6%	3%	6%	5%	6%	4%	5%	5%	5%	9%↑	3%↓	9%↑	4%	3%	5%	6%	5%	5%	7%	10%	3%↓	8%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.51. Q17: Are you aware of the energy price comparison tool provided by the Consumer Council of Northern Ireland? by Banner
Weight: Weight2; base n = from 1275 to 1503; total n = 1503; 228 missing

Q17: Are you aware of the energy price comparison tool provided by the Consumer Council of Northern Ireland?	Banner																							
	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Yes, and I have used it	18%	16%↑	12%	6%↓	12%	14%	7%↓	21%↑	12%↓	30%↑	18%↑	14%	10%↓	11%	16%	14%	15%	11%	13%	12%	14%	18%	11%	12%
Yes, but never used it	38%↑	19%↓	22%	24%	24%	25%	22%	25%	23%	32%	20%	25%	25%	24%	25%	21%	20%	30%	28%	22%	21%	44%↑	21%	24%
No	45%↓	65%	66%	70%↑	63%	61%	71%↑	54%↓	65%↑	38%↓	62%	61%	65%	65%	59%	64%	65%	59%	60%	66%	65%	38%↓	69%↑	63%
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Figure B.52. Q19 Gas bill: How do you receive your…? by Banner
Weight: Weight2; base n = from 313 to 358; total n = 1503; 1190 missing

Q19 How do you receive your… Gas bill?	Banner																							
	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulnerable	Not vulnerable	No	Yes	No	Yes	Urban location	Suburban location	Rural location	Up to £15,499	£15,500 - £39,999	£40,000+	Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment or PAYG meter	Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
In the post	31%	40%	49%	38%	40%	42%	44%	35%	43%	31%	38%	40%	37%	38%	33%	48%	38%	32%	62%	40%	40%	36%	52%	39%
Via email or online	48%	27%	31%	36%	37%	29%	31%	36%	31%	40%	29%	38%	31%	26%	39%	35%	51% ↑	45%	10%	14% ↓	54% ↑	54% ↑	11%	15% ↓
Through an app	10%	14% ↑	1% ↓	0%	5%	9%	5%	11%	5% ↓	17% ↑	8%	5%	14%	7%	9%	8%	0% ↓	13%	3%	14% ↑	2% ↓	9%	12%	10%
Other (please specify)	10%	20%	20%	26%	18%	20%	20%	18%	21%	12%	25%	17%	18%	29%	19%	8% ↓	11% ↓	10%	24%	32% ↑	4% ↓	0% ↓	25%	35% ↑
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Figure B.53. Q19 Electricity bill: How do you receive your…? by Banner
Weight: Weight2; base n = from 1275 to 1503; total n = 1503; 228 missing

Q19 How do you receive your… Electricity bill?	Banner																							
	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulnerable	Not vulnerable	No	Yes	No	Yes	Urban location	Suburban location	Rural location	Up to £15,499	£15,500 - £39,999	£40,000+	Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment or PAYG meter	Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
In the post	22% ↓	28% ↓	40% ↑	49% ↑	37%	34%	44% ↑	23% ↓	36%	22%	34%	30% ↓	41% ↑	42% ↑	31%	28% ↓	30% ↓	43% ↑	62% ↑	26% ↓	32%	29%	38% ↑	31%
Via email or online	47%	42%	43%	37%	41%	42%	37% ↓	49% ↑	41%	55%	42%	44%	37%	28% ↓	46%	57% ↑	64% ↑	49% ↑	23% ↓	18% ↓	57% ↑	55%	39%	26% ↓
Through an app	20% ↑	11% ↑	3% ↓	1% ↓	6%	10% ↑	6% ↓	10% ↑	7%	14%	8%	10%	6%	9%	9%	7%	4% ↓	7%	6%	13% ↑	5%	16%	6%	12%
Other (please specify)	11%	19% ↑	14%	14%	15%	13%	14%	18%	16%	8%	15%	15%	16%	21% ↑	14%	9% ↓	2% ↓	1% ↓	8% ↓	43% ↑	6% ↓	0% ↓	17%	31% ↑
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Figure B.54. Q20 Annual statement: How do you receive your…? by Banner
Weight: Weight2; base n = from 1275 to 1503; total n = 1503; 228 missing

Q20 Annual statement	Banner																							
	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulnerable	Not vulnerable	No	Yes	No	Yes	Urban location	Suburban location	Rural location	Up to £15,499	£15,500 - £39,999	£40,000+	Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment or PAYG meter	Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Didn't read it	8%	11%	9%	7%	10%	7%	10%	8%	10%	5%	11%	7%	11%	10%	8%	13%	9%	11%	11%	8%	10%	9%	10%	7%
Only glanced at it	14%	17%	14%	14%	15%	17%	16%	13%	15%	15%	15%	17%	14%	15%	14%	15%	14%	14%	18%	16%	17%	6%	15%	18%
Read it but it wasn't very clear	22% ↑	9%	5% ↓	3% ↓	9%	8%	5% ↓	13% ↑	7% ↓	35% ↑	10%	9%	6%	11%	9%	5%	6%	10%	14%	8%	9%	30% ↑	5% ↓	10%
Read it and I understood most of it	31% ↑	16%	14%	14%	17%	17%	16%	17%	17%	9%	19%	17%	15%	16%	20%	13%	17%	13%	13%	20%	15%	14%	15%	21%
Read it and understood all of it	13%	18%	22%	20%	18%	21%	20%	18%	19%	22%	17%	20%	20%	14%	21%	22%	21%	18%	15%	20%	26%	16%	18%	17%
N/A never received	12% ↓	30%	35%	42% ↑	32%	30%	32%	31%	33% ↑	14% ↓	27%	30%	34%	33%	28%	32%	33%	35%	30%	28%	23% ↓	24%	37% ↑	28%
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Figure B.55. Q20 Bill/Direct debit statement: How do you receive your…? by Banner
Weight: Weight2; base n = from 1275 to 1503; total n = 1503; 228 missing

Q20 Bill/Direct debit statement	Banner																							
	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulnerable	Not vulnerable	No	Yes	No	Yes	Urban location	Suburban location	Rural location	Up to £15,499	£15,500 - £39,999	£40,000+	Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment or PAYG meter	Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Didn't read it	9%	10%	9%	9%	10%	8%	9%	10%	10%	7%	12%	6% ↓	11%	10%	9%	12%	10%	10%	12%	8%	9%	5%	11%	7%
Only glanced at it	14%	17%	14%	16%	15%	16%	15%	16%	15%	16%	14%	17%	15%	14%	15%	15%	18%	20%	15%	9% ↓	17%	16%	16%	13%
Read it but it wasn't very clear	21% ↑	6%	5%	3% ↓	9%	6%	6%	10%	7% ↓	18% ↑	10%	9%	4% ↓	8%	8%	6%	7%	11%	11%	5%	12% ↑	18% ↑	4% ↓	8%
Read it and I understood most of it	27%	16%	20%	18%	19%	20%	19%	20%	18%	28%	19%	20%	19%	17%	22%	19%	23% ↑	21%	19%	14% ↓	23%	30%	16%	18%
Read it and understood all of it	19%	23%	27%	35% ↑	25%	27%	30% ↑	21% ↓	27%	19%	24%	26%	28%	19% ↓	27%	32% ↑	33% ↑	30%	24%	16% ↓	32%	18%	27%	17% ↓
N/A never received	9% ↓	28% ↑	24%	19%	22%	22%	21%	25%	23%	14%	22%	22%	23%	32% ↑	19%	15% ↓	8% ↓	8% ↓	19%	49% ↑	7% ↓	13%	25%	36% ↑
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Figure B.56. Q20 Price increase letter: How do you receive your…? by Banner
Weight: Weight2; base n = from 1275 to 1503; total n = 1503; 228 missing

	Banner																								
	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
Q20 Price increase letter	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Didn't read it	11%	9%	7%	7%	9%	7%	8%	8%	8%	9%	9%	6%	10%	9%	8%	7%	6%	10%	8%	9%	7%	10%	9%	7%
Only glanced at it	12%	21%	20%	12%↓	17%	18%	18%	18%	18%	19%	18%	17%	17%	17%	17%	22%	18%	18%	21%	17%	16%	20%	19%	16%
Read it but it wasn't very clear	27%↑	11%	7%	5%↓	11%	11%	9%	13%	10%	18%	12%	12%	8%	13%	12%	8%	8%	12%	15%	11%	11%	19%	8%	14%
Read it and I understood most of it	25%	22%	21%	25%	22%	24%	22%	23%	22%	27%	22%	23%	23%	21%	25%	19%	23%	20%	19%	24%	20%	16%	23%	25%
Read it and understood all of it	12%↓	24%	29%	36%↑	25%	28%	28%	24%	27%	21%	24%	28%	27%	24%	26%	31%	31%	25%	22%	24%	34%	25%	27%	20%
N/A never received	14%	13%	16%	16%	15%	13%	15%	14%	15%	6%	14%	14%	15%	17%	12%	14%	14%	16%	15%	14%	11%	10%	15%	17%
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Figure B.57. Q20 Information about a promotional offer ending: How do you receive your…? by Banner
Weight: Weight2; base n = from 1275 to 1503; total n = 1503; 228 missing

	Banner																								
	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
Q20 Information about a promotional offer ending	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Didn't read it	14%	12%	13%	14%	14%	11%	15%↑	10%↓	13%	14%	15%	10%	14%	14%	11%	15%	13%	18%	14%	10%	16%	13%	13%	12%
Only glanced at it	16%	13%	13%	10%	12%	15%	13%	12%	13%	15%	13%	12%	15%	11%	15%	11%	12%	15%	11%	13%	12%	16%	13%	14%
Read it but it wasn't very clear	24%↑	6%	6%	2%↓	9%	6%	5%↓	11%↑	7%	16%	8%	11%	5%	9%	9%	4%	5%	9%	9%	9%	5%	22%↑	5%↓	11%
Read it and I understood most of it	18%	13%	8%↓	12%	10%	14%	9%↓	15%↑	12%	15%	12%	13%	10%	11%	14%	10%	12%	11%	13%	10%	13%	14%	10%	11%
Read it and understood all of it	14%	16%	13%	12%	13%	15%	12%	16%	14%	19%	15%	15%	12%	13%	13%	16%	14%	11%	16%	13%	16%	12%	12%	12%
N/A never received	14%↓	40%	47%↑	51%↑	41%	39%	45%↑	35%↓	42%↑	21%↓	37%	39%	44%	42%	37%	42%	43%	35%	36%	44%	38%	23%↓	46%↑	39%
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Figure B.58. Q21 Gas supplier: Have you ever complained to your previous or current …? by Banner
Weight: Weight2; base n = from 313 to 358; total n = 1503; 1190 missing

	Banner																								
	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
Q21 Have you ever complained to your previous or current ...? Gas supplier	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Yes	24%	12%	12%	5%	13%	13%	11%	16%	8%↓	30%↑	14%	8%	31%↑	18%	12%	11%	9%	25%	28%	7%	13%	35%↑	17%	6%↓
No	65%↓	86%	88%	95%↑	84%	86%	86%	83%	89%↑	68%↓	84%	90%	69%	75%	88%	89%	91%	68%↓	65%↓	91%	87%	58%↓	76%	92%↑
Don't know	10%↑	2%	0%	0%	3%	1%	3%	1%	3%	1%	2%	2%	0%	7%↑	0%	0%	0%	8%	7%	2%	0%	7%	6%	2%
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Figure B.59. Q21 Electricity supplier: Have you ever complained to your previous or current …? by Banner
Weight: Weight2; base n = from 1274 to 1501; total n = 1503; 229 missing

Q21 Have you ever complained to your previous or current ...? Electricity suppliers	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Yes	32%↑	17%	15%	11%↓	20%	14%	14%↓	21%↑	16%↓	31%↑	17%	17%	18%	17%	20%	15%	19%	17%	17%	15%	15%	23%	15%	13%
No	65%↓	82%	84%	89%↑	80%	85%	85%↑	78%↓	83%↑	69%↓	82%	81%	82%	82%	79%	85%	80%	80%	83%	85%	85%	64%↓	84%	87%
Don't know	4%↑	1%	0%	0%	1%	2%	1%	1%	1%	0%	1%	2%	0%	1%	1%	0%	1%	4%↑	0%	1%	1%	13%↑	0%	0%
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Figure B.60. Q21a: How quickly was your most recent complaint resolved? by Banner
Weight: Weight2; base n = from 220 to 251; total n = 1503; 1283 missing

Q21a: How quickly was your most recent complaint resolved?	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulne-rable	Not vulne-rable	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly direct debit	Quart-erly direct debit	Cheq-ue, ca-sh or card	Prepa-yment or PA-YG meter	Mont-hly direct debit	Quart-erly direct debit	Cheq-ue, ca-sh or card	Prepa-yment or PA-YG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Never and not expecting it to be	20%	13%	18%	13%	20%	9%	14%	18%	17%	10%	20%	17%	13%	23%	14%	15%	12%	9%	16%	25%	20%	16%	17%	19%
On-going	7%	4%	9%	2%	6%	7%	5%	6%	6%	3%	5%	5%	6%	8%	5%	5%	2%	5%	11%	10%	2%	5%	3%	9%
Within a day	37%	32%	30%	28%	33%	33%	30%	35%	29%	52%	43%	20%	36%	28%	34%	33%	33%	39%	30%	28%	31%	50%	30%	41%
Within two weeks	27%	32%	17%	22%	23%	27%	24%	26%	26%	19%	15%	36%	21%	22%	25%	30%	27%	34%	20%	21%	29%	24%	25%	0%
Within a month	7%	8%	9%	11%	9%	10%	10%	6%	9%	6%	12%	5%	9%	5%	13%	5%	11%	4%	10%	4%	2%	0%	10%	6%
Took longer than a month to resolve	3%	7%	11%	15%	6%	8%	10%	6%	9%	6%	1%	13%	11%	8%	6%	9%	11%	4%	7%	8%	9%	0%	10%	20%
Not sure	0%	4%	7%	9%	4%	7%	6%	3%	4%	3%	4%	4%	4%	5%	4%	4%	4%	4%	7%	4%	7%	5%	4%	5%
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Figure B.61. Q21b: How satisfied were you with the outcome of your most recent complaint? by Banner
Weight: Weight2; base n = from 220 to 251; total n = 1503; 1283 missing

Q21b: How satisfied were you with the outcome of your most recent complaint?	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
NET: Satisfied	27%	37%	40%	26%	36%	28%	31%	37%	37%	13%	28%	40%	36%	43%	30%	42%	32%	28%	36%	36%	31%	31%	37%	40%
NET: Dissatisfied	30%	33%	47%	70%↑	40%	43%	51%	30%	41%	37%	47%	34%	41%	32%	43%	33%	47%	38%	26%	41%	39%	17%	43%	37%
Very dissatisfied	3%	20%	20%	17%	15%	16%	17%	14%	17%	7%	14%	19%	15%	12%	14%	25%	19%	9%	10%	16%	21%	12%	16%	26%
Dissatisfied	23%	17%	20%	9%	22%	12%	14%	22%	20%	6%	14%	21%	21%	31%	15%	17%	13%	19%	26%	20%	10%	18%	21%	14%
Neither satisfied or dissatisfied	43%	30%	13%	4%	24%	29%	17%	33%	22%	50%	25%	27%	23%	26%	27%	24%	21%	34%	38%	23%	30%	53%	20%	23%
Satisfied	17%	26%	29%	39%	24%	31%	31%	22%	27%	20%	27%	22%	27%	15%	31%	22%	29%	27%	22%	23%	24%	17%	30%	21%
Very satisfied	13%	7%	18%	30%	16%	12%	21%	8%	14%	16%	20%	12%	13%	16%	13%	12%	18%	11%	4%	18%	15%	0%	13%	16%
Top2box	30%	33%	47%	70%↑	40%	43%	51%	30%	41%	37%	47%	34%	41%	32%	43%	33%	47%	38%	26%	41%	39%	17%	43%	37%
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Figure B.62. Q21c: Have you ever wanted to complain to your current or previous supplier? by Banner
Weight: Weight2; base n = from 1043 to 1240; total n = 1503; 460 missing

Q21c: Have you ever wanted to complain to your current or previous supplier?	Banner: S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Yes – I wanted to but wasn't sure how to	8%	5%	2%	1%	4%	3%	3%	4%	3%	4%	6%	3%	3%	6%	4%	1%	2%	4%	4%	4%	1%	10%	3%	5%
Yes – I wanted to and knew how to, but never got around to it	15% ↑	8%	3%	3% ↓	6%	7%	5%	8%	6%	10%	5%	8%	6%	6%	5%	10%	6%	6%	7%	5%	8%	13%	5%	4%
Yes - I wanted to and knew how to, but I didn't think it would make a difference	17%	9%	7%	5%	10%	7%	8%	10%	8%	12%	9%	6%	10%	11%	9%	5%	7%	7%	8%	11%	6%	19%	7%	14%
NET: Yes	40% ↑	22%	12% ↓	9% ↓	20%	16%	15%	22%	18%	25%	20%	16%	18%	22%	18%	16%	16%	17%	19%	21%	14%	42% ↑	15%	23%
No	60% ↓	78%	88% ↑	91% ↑	80%	84%	85%	78%	82%	75%	80%	84%	82%	78%	82%	84%	84%	83%	81%	79%	86%	58% ↓	85%	77%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.63. Q22: If you had a concern relating to your gas/electricity supplier, would you know how to go about making a complaint? by Banner
Weight: Weight2; base n = from 1043 to 1240; total n = 1503; 460 missing

Q22: If you had a concern relating to your gas/ electricity supplier, would you know how to go about making a complaint?	Banner: S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Yes	49%	63%	62%	68%	60%	62%	64%	60%	63%	54%	58%	59%	68% ↑	53% ↓	62%	72% ↑	70% ↑	60%	57%	57%	69%	50%	65%	51% ↓
No	32%	28%	26%	24%	27%	27%	25%	29%	27%	31%	29%	29%	24%	31%	28%	22%	21% ↓	34%	31%	29%	19%	45%	26%	34%
Not sure	19%	9%	12%	8%	12%	11%	11%	11%	11%	15%	13%	12%	8%	16% ↑	10%	6%	9%	6%	12%	15%	12%	4%	9%	16%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.64. Q23: Are you aware energy companies have special services in place to support those who are vulnerable the community/those that need extra support? For example, customers with disabilities, those with mental health issues, etc. by Banner
Weight: Weight2; base n = from 1275 to 1503; total n = 1503; 228 missing

Q23: Are you aware energy companies have special services in place to support those who are vulnerable the community / those that need extra support? For example, customers with disabilities, those with mental health issues, etc.	Banner: S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Yes – and know a bit about the services offered	24%	18%	21%	20%	21%	19%	20%	21%	20%	30%	23%	18%	21%	19%	20%	23%	21%	17%	23%	19%	22%	19%	18%	19%
Yes – but don't know what these services are	38%↑	20%	22%	27%	25%	25%	22%	26%	24%	27%	24%	25%	23%	20%	27%	22%	25%	26%	24%	23%	25%	41%↑	22%	23%
No	34%↓	59%↑	54%	53%	53%	51%	55%	50%	54%	38%	49%	53%	55%	56%	50%	54%	52%	55%	50%	54%	50%	35%↓	58%↑	52%
Not sure	5%	3%	3%	0%	1%↓	5%↑	2%	3%	3%	5%	4%	3%	1%	5%	2%	1%	1%	3%	2%	5%	3%	5%	2%	6%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.65. Q24: Have you used any support services offered by energy companies? by Banner
Weight: Weight2; base n = from 1275 to 1503; total n = 1503; 228 missing

Q24. Have you used any support services offered by energy companies?	Banner: S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Signed up to the Critical Care Register	11%↑	4%	3%	2%	6%↑	2%↓	3%↓	6%↑	4%	7%	7%↑	3%	3%	5%	5%	3%	6%	3%	3%	3%	4%	3%	2%	3%
Signed up to the Customer Care Register	20%↑	6%	2%↓	0%↓	6%	5%	3%↓	8%↑	4%↓	21%↑	6%	6%	5%	7%	7%	3%	3%↓	10%↑	10%↑	4%	4%	22%↑	2%↓	6%
Requested a large print bill	16%↑	6%	1%↓	1%↓	5%	5%	3%↓	7%↑	4%↓	19%↑	8%	4%	3%	5%	6%	4%	3%	7%	9%	4%	5%	16%↑	3%	3%
Included in the Password Scheme	7%↑	2%	1%	0%↓	3%	1%	1%	3%	2%	4%	3%	2%	1%	2%	2%	1%	1%↓	5%↑	4%	1%	1%	6%↑	1%	2%
Other (specify)	0%	0%	0%	1%	1%	0%	0%	0%	0%	1%	1%	0%	0%	0%	0%	0%	0%	0%	0%	1%↑	1%	0%	0%	1%
None of these	58%↓	85%	94%↑	97%↑	84%↓	89%	91%↑	81%↓	88%↑	62%↓	81%↓	87%	90%↑	83%	85%	91%↑	89%	79%↓	78%↓	90%	86%	60%↓	93%↑	89%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.66. Q24a Signed up to the Critical Care Register by Banner
Weight: Weight2; base n = from 36 to 49; total n = 1503; 1467 missing

	Banner																							
Q24a Signed up to the Critical Care Register	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
NET: 1-3	0%	17%	7%	0%	0%	40%	8%	6%	6%	20%	8%	0%	12%	0%	8%	13%	7%	15%	16%	0%	0%	100%↑	0%	14%
NET: 8-10	56%	44%	72%	50%	61%	22%	62%	50%	52%	80%	56%	27%	78%	66%	43%	74%	58%	41%	21%	64%	61%	0%	73%	54%
Very Dissatisfied 1	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
2	0%	6%	0%	0%	0%	11%	5%	0%	2%	0%	0%	0%	7%	0%	4%	0%	0%	15%	0%	0%	0%	50%	0%	0%
3	0%	11%	7%	0%	0%	30%	4%	6%	4%	20%	8%	0%	5%	0%	4%	13%	7%	0%	16%	0%	0%	50%	0%	14%
4	0%	11%	0%	0%	5%	0%	0%	6%	4%	0%	8%	0%	0%	0%	4%	13%	4%	15%	0%	0%	0%	0%	0%	0%
5	11%	11%	7%	25%	6%	30%	13%	10%	13%	0%	4%	32%	5%	5%	20%	0%	16%	0%	0%	14%	39%	0%	4%	0%
6	33%	6%	7%	0%	18%	8%	4%	23%	17%	0%	16%	29%	0%	21%	18%	0%	11%	29%	42%	6%	0%	0%	16%	0%
7	0%	5%	0%	12%	4%	0%	8%	0%	3%	0%	4%	0%	4%	0%	4%	0%	0%	0%	21%	5%	0%	0%	4%	0%
8	33%	17%	29%	0%	26%	22%	41%	11%	22%	40%	25%	22%	21%	21%	29%	10%	21%	23%	0%	39%	24%	0%	23%	54%
9	11%	6%	0%	13%	7%	0%	3%	10%	8%	0%	4%	0%	18%	0%	6%	26%	10%	0%	0%	8%	0%	0%	9%	0%
Very Satisfied 10	11%	22%	43%	37%	28%	0%	18%	28%	22%	40%	27%	5%	38%	45%	8%	38%	27%	18%	21%	17%	36%	0%	40%	0%
Don't know	0%	6%	7%	12%	6%	0%	5%	4%	5%	0%	3%	12%	0%	7%	3%	0%	4%	0%	0%	11%	0%	0%	4%	32%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.67. Q24a Signed up to the Customer Care Register by Banner
Weight: Weight2; base n = from 40 to 57; total n = 1503; 1463 missing

	Banner																							
Q24a Signed up to the Customer Care Register	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
NET: 1-3	23%	21%	10%	0%	26%	18%	23%	20%	18%	33%	27%	21%	17%	19%	23%	18%	22%	23%	18%	18%	43%	35%	6%	10%
NET: 8-10	12%	32%	80%	0%	35%	16%	33%	24%	33%	7%	27%	12%	44%	23%	24%	50%	49%	26%	19%	21%	43%	0%	49%	27%
Very Dissatisfied 1	0%	4%	10%	0%	4%	0%	3%	2%	3%	0%	4%	4%	0%	5%	0%	8%	0%	0%	6%	5%	0%	0%	0%	0%
2	12%	4%	0%	0%	9%	5%	12%	4%	5%	13%	9%	8%	4%	10%	6%	0%	22%	9%	0%	0%	43%	14%	0%	0%
3	12%	14%	0%	0%	12%	13%	8%	13%	9%	20%	14%	8%	12%	5%	17%	10%	0%	14%	12%	13%	0%	21%	6%	10%
4	0%	4%	0%	0%	0%	5%	4%	0%	2%	0%	0%	0%	4%	5%	0%	0%	0%	0%	6%	0%	0%	0%	0%	0%
5	18%	14%	10%	0%	14%	18%	7%	20%	16%	13%	5%	29%	8%	23%	14%	10%	15%	23%	17%	0%	14%	36%	11%	0%
6	29%	14%	0%	0%	14%	31%	12%	24%	14%	40%	28%	25%	9%	24%	20%	21%	0%	9%	34%	38%	0%	14%	24%	53%
7	18%	14%	0%	100%	11%	13%	22%	11%	17%	7%	14%	12%	19%	5%	20%	0%	14%	18%	6%	23%	0%	14%	10%	10%
8	6%	7%	20%	0%	11%	3%	12%	6%	10%	0%	0%	12%	11%	10%	7%	11%	7%	14%	4%	5%	28%	0%	16%	0%
9	0%	0%	30%↑	0%	4%	3%	6%	2%	4%	0%	0%	0%	10%	4%	4%	0%	6%	0%	9%	0%	0%	0%	9%	8%
Very Satisfied 10	6%	25%	30%	0%	20%	9%	15%	17%	19%	7%	27%	0%	23%	10%	13%	40%	36%	13%	6%	16%	14%	0%	23%	19%
Don't know	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.68. Q24a Requested a large print bill by Banner
Weight: Weight2; base n = from 38 to 51; total n = 1503; 1465 missing

	Banner																							
	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
Q24a Requested a large print bill	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
NET: 1-3	0%	10%	0%	33%	5%	8%	2%	8%	3%	15%	6%	13%	0%	7%	3%	9%	0%	7%	7%	9%	6%	10%	5%	20%
NET: 8-10	14%	41%	75%	34%	33%	26%	51%	17%	39%	0%	50%	19%	11%	17%	29%	57%	50%	25%	32%	17%	7%	28%	34%	40%
Very Dissatisfied 1	0%	3%	0%	33%	2%	4%	2%	3%	1%	8%	2%	6%	0%	7%	0%	0%	0%	0%	0%	9%	6%	0%	0%	20%
2	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
3	0%	7%	0%	0%	3%	4%	0%	5%	2%	8%	4%	6%	0%	0%	3%	9%	0%	7%	7%	0%	0%	10%	5%	0%
4	22%	17%	0%	0%	19%	20%	8%	25%	14%	31%	11%	13%	32%	42%	16%	0%	7%	28%	41%	0%	38%	31%	19%	0%
5	21%	17%	0%	0%	16%	20%	0%	30%	16%	23%	19%	25%	13%	14%	29%	0%	13%	14%	14%	28%	19%	10%	23%	0%
6	21%	3%	0%	0%	13%	12%	16%	8%	10%	15%	8%	6%	13%	7%	13%	17%	0%	7%	0%	34%	0%	0%	9%	40%
7	22%	10%	25%	0%	13%	15%	23%	11%	16%	15%	4%	24%	32%	12%	10%	17%	26%	19%	7%	11%	29%	21%	8%	0%
8	14%	17%	25%	0%	15%	16%	27%	8%	20%	0%	19%	19%	5%	7%	13%	40%	31%	7%	14%	12%	0%	20%	17%	40%
9	0%	10%	25%	0%	6%	3%	7%	6%	8%	0%	14%	0%	0%	0%	9%	9%	7%	5%	7%	6%	7%	0%	5%	0%
Very Satisfied 10	0%	14%	25%	34%	11%	7%	17%	3%	11%	0%	17%	0%	6%	10%	6%	8%	13%	12%	11%	0%	0%	8%	12%	0%
Don't know	0%	0%	0%	33%↑	2%	0%	0%	2%	1%	0%	2%	0%	0%	0%	0%	0%	4%	0%	0%	0%	0%	0%	3%	0%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.69. Q24a Included in the Password Scheme by Banner
Weight: Weight2; base n = from 16 to 20; total n = 1503; 1487 missing

	Banner																							
	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
Q24a Included in the Password Scheme	18-24	25-44	45-64	65+	Vulne-rable	Not vulne-rable	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly direct debit	Quart-erly direct debit	Cheq-ue, ca-sh or card	Prepa-yment or PA-YG meter	Mont-hly direct debit	Quart-erly direct debit	Cheq-ue, ca-sh or card	Prepa-yment or PA-YG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
NET: 1-3	33%	0%	25%	100%	14%	42%	33%	14%	25%	0%	25%	0%	17%	0%	32%	0%	20%	18%	28%	0%	0%	0%	15%	49%
NET: 8-10	0%	44%	25%	0%	16%	16%	30%	12%	22%	0%	28%	21%	0%	17%	26%	0%	56%	9%	14%	34%	51%	0%	21%	25%
Very Dissatisfied 1	0%	0%	25%	0%	0%	0%	7%	0%	3%	0%	7%	0%	0%	0%	7%	0%	0%	0%	0%	0%	0%	0%	8%	0%
2	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
3	33%	0%	0%	100%	14%	42%	26%	14%	21%	0%	18%	0%	17%	0%	24%	0%	20%	18%	28%	0%	0%	0%	7%	49%
4	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
5	17%	44%	0%	0%	28%	21%	20%	28%	23%	33%	28%	24%	27%	83%	0%	0%	0%	37%	0%	66%	0%	50%	32%	25%
6	34%	11%	25%	0%	26%	21%	10%	33%	17%	67%	0%	45%	55%	0%	16%	100%	24%	28%	29%	0%	49%	50%	11%	0%
7	17%	0%	25%	0%	15%	0%	7%	14%	13%	0%	19%	9%	0%	0%	26%	0%	0%	7%	29%	0%	0%	0%	21%	0%
8	0%	11%	0%	0%	5%	0%	10%	0%	5%	0%	9%	0%	0%	0%	9%	0%	0%	0%	14%	0%	0%	0%	0%	0%
9	0%	11%	25%	0%	0%	16%	0%	12%	8%	0%	9%	9%	0%	0%	17%	0%	24%	0%	0%	34%	51%	0%	11%	0%
Very Satisfied 10	0%	22%	0%	0%	11%	0%	20%	0%	9%	0%	9%	12%	0%	17%	0%	0%	32%	9%	0%	0%	0%	0%	11%	25%
Don't know	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.70. Q25 Electricity: How satisfied are you with the overall service you receive from your energy supplier by Banner
Weight: Weight2; base n = from 1274 to 1501; total n = 1503; 229 missing

Q25 How satisfied are you with the overall service you receive from your energy supplier Electricity	Banner																							
	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
NET: 1-3	7%	4%	5%	2%	5%	4%	4%	6%	4%	10%	5%	4%	4%	5%	5%	4%	4%	5%	7%	4%	4%	9%	4%	4%
NET: 8-10	34%	45%	57%	67%↑	52%	50%	55%	47%	52%	44%	48%	50%	56%	50%	52%	55%	54%	49%	47%	53%	56%	26%*	55%	48%
Very Dissatisfied 1	1%	1%	2%	1%	1%	1%	1%	1%	1%	0%	1%	2%	1%	1%	1%	1%	1%	1%	2%	1%	0%	0%	1%	2%
2	2%	1%	1%	0%	1%	1%	1%	1%	1%	3%	1%	1%	1%	2%	0%	0%	1%	1%	2%	1%	1%	2%	1%	1%
3	4%	3%	2%	1%	2%	3%	2%	4%	2%	7%	3%	2%	3%	2%	3%	3%	3%	3%	3%	2%	3%	8%	2%	1%
4	6%	4%	2%	1%	3%	4%	2%	5%	3%	10%	3%	4%	3%	2%	4%	3%	2%	5%	5%	3%	2%	10%	3%	4%
5	19%	18%	12%	13%	15%	16%	14%	17%	15%	12%	15%	17%	13%	18%	14%	12%	14%	17%	14%	16%	11%	22%	15%	15%
6	10%	8%	8%	5%	8%	9%	8%	8%	7%	15%	8%	10%	6%	9%	7%	6%	7%	8%	8%	8%	5%	16%	6%	12%
7	22%	19%	15%	11%	17%	16%	17%	16%	17%	8%	20%	13%	18%	14%	18%	19%	18%	16%	18%	16%	20%	18%	16%	14%
8	15%	21%	21%	27%	22%	22%	23%	20%	22%	20%	18%	21%	24%	19%	21%	27%	24%	18%	19%	21%	25%	16%	23%	18%
9	8%	8%	13%	13%	10%	12%	12%	9%	11%	10%	7%	13%	12%	11%	11%	11%	13%	11%	6%	9%	14%	1%	11%	10%
Very Satisfied 10	11%	16%	22%	27%↑	21%	17%	20%	18%	20%	14%	22%	17%	20%	20%	19%	18%	16%	19%	22%	22%	16%	9%	21%	20%
Don't know	2%	1%	1%	0%	1%	1%	1%	1%	1%	1%	1%	2%	0%	2%	0%	1%	0%	1%	2%	1%	2%	0%	0%	1%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.71. Q25 Gas: How satisfied are you with the overall service you receive from your energy supplier by Banner
Weight: Weight2; base n = from 313 to 358; total n = 1503; 1190 missing

Q25 How satisfied are you with the overall service you receive from your energy supplier Gas	Banner																							
	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
NET: 1-3	10%	7%	10%	2%	8%	9%	7%	8%	6%	14%	11%	4%	10%	14%	4%	5%	7%	11%	6%	8%	7%	16%	2%	7%
NET: 8-10	28%	37%	47%	65%↑	49%	36%	47%	39%	44%	40%	39%	49%	39%	40%	51%	33%	52%	29%	28%	43%	50%	19%	37%	45%
Very Dissatisfied 1	0%	0%	4%	1%	1%	1%	1%	1%	1%	0%	1%	1%	2%	2%	1%	0%	0%	0%	0%	3%	0%	0%	0%	3%
2	0%	2%	2%	0%	0%	2%	1%	1%	1%	1%	1%	1%	3%	1%	1%	0%	1%	2%	3%	0%	2%	2%	2%	0%
3	10%	6%	5%	1%	6%	6%	4%	7%	3%	13%	9%	3%	6%	11%	3%	5%	5%	9%	3%	5%	6%	14%	0%	4%
4	7%	6%	2%	1%	3%	6%	4%	5%	4%	6%	5%	5%	3%	7%	3%	5%	3%	4%	0%	7%	3%	9%	0%	5%
5	21%	16%	17%	11%	15%	18%	15%	18%	17%	12%	16%	18%	12%	18%	13%	22%	14%	25%	16%	15%	13%	21%	32%	14%
6	7%	10%	12%	7%	7%	14%	11%	8%	9%	11%	12%	8%	5%	10%	9%	10%	8%	14%	10%	8%	11%	11%	4%	9%
7	24%	23%	11%	11%	15%	17%	15%	21%	18%	17%	16%	15%	31%	11%	19%	25%	16%	17%	33%	17%	15%	24%	24%	17%
8	10%	18%	13%	27%	18%	15%	18%	16%	18%	13%	15%	21%	11%	12%	20%	15%	23%	8%	8%	15%	25%	8%	14%	14%
9	7%	10%	9%	9%	11%	6%	8%	10%	8%	13%	7%	13%	5%	6%	14%	4%	10%	8%	5%	8%	7%	2%	12%	12%
Very Satisfied 10	10%	10%	24%	29%	20%	15%	21%	13%	18%	14%	16%	16%	23%	22%	17%	14%	18%	13%	15%	19%	19%	10%	11%	19%
Don't know	3%	1%	1%	2%	3%	0%	1%	2%	2%	1%	0%	2%	0%	1%	1%	0%	1%	0%	7%	2%	1%	0%	0%	3%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.72. Q25 Other: How satisfied are you with the overall service you receive from your energy supplier by Banner
Weight: Weight2; base n = from 877 to 1048; total n = 1503; 626 missing

Q25 How satisfied are you with the overall service you receive from your energy supplier Other	S3: Can you tell me which of the following age categories applies to you? 18-24	25-44	45-64	65+	Vulnerable	Not vulnerable	Electricity engaged No	Yes	Gas engaged No	Yes	S12: In which type of location do you currently live? Urban location	Sub-urban location	Rural location	QHIDINCOME: Income Brackets Up to £15,499	£15,500 - £39,999	£40,000+	Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)? Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment or PAYG meter	Q5d: How do you pay for your home heating? Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
NET: 1-3	8%	2%	2%	2%	2%	3%	3%	2%	2%	NaN	1%	3%	3%	3%	2%	3%	2%	3%	4%	3%	2%	0%	3%	3%
NET: 8-10	30%↓	55%	62%	77%↑	59%	58%	65%↑	51%↓	60%	NaN	59%	48%↓	66%↑	61%	56%	66%	65%	65%	58%	51%↓	65%	30%	61%	39%
Very Dissatisfied 1	3%	1%	0%	1%	1%	0%	1%	0%	1%	NaN	1%	2%	1%	1%	1%	1%	1%	1%	2%	0%	1%	0%	1%	0%
2	0%	1%	0%	0%	0%	1%	0%	0%	0%	NaN	0%	0%	0%	1%	0%	0%	0%	0%	2%↑	0%	0%	0%	0%	0%
3	6%	1%	1%	1%	1%	2%	1%	1%	1%	NaN	0%	0%	2%	1%	1%	2%	1%	2%	0%↓	2%	1%	0%	1%	3%
4	8%	2%	1%	1%	2%	2%	2%	2%	2%	NaN	3%	2%	2%	1%	4%	0%	0%	4%	5%	2%	0%	10%	2%	6%
5	14%	10%	6%	7%	9%	8%	7%	11%	8%	NaN	8%	9%	8%	11%	9%	6%	7%	12%	8%	9%	7%	15%	8%	14%
6	14%	6%	4%	2%	5%	6%	3%	8%	5%	NaN	7%	6%	4%	5%	6%	2%	4%	4%	4%	7%	2%	20%	4%	23%↑
7	11%	10%	8%	4%	8%	8%	8%	8%	8%	NaN	10%	8%	7%	5%	8%	9%	10%	5%	8%	8%	10%	5%	8%	0%
8	17%	19%	21%	20%	18%	21%	22%	16%	20%	NaN	20%	15%	21%	19%	19%	23%	24%	21%	20%	15%	32%	19%	19%	5%
9	3%	13%	12%	15%	12%	12%	14%	9%	12%	NaN	9%	12%	13%	12%	12%	14%	13%	13%	10%	9%	14%	0%	12%	16%
Very Satisfied 10	11%	23%	30%	41%↑	29%	25%	29%	27%	28%	NaN	30%	20%↓	32%	30%	26%	29%	28%	32%	28%	27%	19%	12%	30%	18%
Don't know	14%	15%	17%	7%↓	15%	14%	12%	17%	14%	NaN	11%	24%↑	10%↓	14%	15%	14%	13%	7%	13%	20%↑	13%	20%	14%	14%
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%	NaN	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Figure B.73. Q26 Electricity: To what extent do you trust your energy supplier to give you clear information and a fair price? by Banner
Weight: Weight2; base n = from 1274 to 1501; total n = 1503; 229 missing

Q26 To what extent do you trust your energy supplier to give you clear information and a fair price? Electricity	S3: Can you tell me which of the following age categories applies to you? 18-24	25-44	45-64	65+	Vulnerable	Not vulnerable	Electricity engaged No	Yes	Gas engaged No	Yes	S12: In which type of location do you currently live? Urban location	Sub-urban location	Rural location	QHIDINCOME: Income Brackets Up to £15,499	£15,500 - £39,999	£40,000+	Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)? Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment or PAYG meter	Q5d: How do you pay for your home heating? Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
NET: 1-3	7%	14%↑	10%	8%	12%	8%	10%	12%	11%	7%	13%	8%	11%	13%	9%	11%	9%	10%	13%	12%	7%	10%	11%	15%
NET: 8-10	35%	31%↓	45%	55%↑	43%	39%	44%↑	35%↓	41%	31%	38%	38%	46%	38%	43%	38%	39%	40%	42%	41%	40%	20%	41%	38%
Do not trust at all	4%	6%	5%	4%	6%	3%	5%	5%	5%	1%	6%	4%	5%	7%	4%	4%	3%	3%	7%	6%	3%	3%	5%	9%
2	0%	4%↑	1%	1%	2%	2%	2%	2%	2%	1%	2%	1%	3%	1%	1%	3%	2%	2%	3%	2%	2%	0%	2%	2%
3	4%	5%	4%	3%	4%	3%	4%	4%	4%	4%	6%	3%	4%	5%	3%	4%	4%	5%	3%	3%	3%	6%	4%	4%
4	11%	7%	4%	2%↓	5%	7%	6%	5%	6%	3%	7%	6%	4%	5%	6%	6%	5%	5%	6%	6%	4%	16%↑	5%	4%
5	20%	18%	17%	11%↓	15%	18%	15%	19%	16%	23%	15%	18%	16%	19%	15%	17%	16%	18%	15%	17%	15%	21%	16%	17%
6	18%	13%	10%	6%↓	10%	12%	10%	13%	10%	22%	11%	12%	10%	9%	13%	13%	12%	14%	7%	10%	15%	20%	10%	11%
7	9%	16%	14%	14%	13%	15%	14%	13%	14%	13%	15%	15%	12%	12%	14%	16%	17%	12%	15%	12%	17%	9%	15%	13%
8	13%	17%	21%	24%	19%	20%	19%	19%	20%	11%	16%	19%	23%	17%	22%	18%	19%	19%	15%	21%	18%	14%	20%	19%
9	12%	4%↓	8%	11%	8%	9%	10%↑	5%↓	8%	6%	6%	8%	9%	6%	9%	9%	9%	9%	6%	6%	12%	2%	7%	4%
Completely trust	11%	9%↓	15%	20%↑	16%	10%	15%	11%	13%	15%	15%	11%	14%	15%	12%	11%	11%	12%	21%↑	14%	10%	5%	14%	15%
Don't know	0%	2%	1%	3%	2%	1%	1%	1%	1%	1%	0%	3%	1%	3%↑	0%	0%	1%	1%	2%	2%	2%	3%	1%	1%
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Figure B.74. Q26 Gas: To what extent do you trust your energy supplier to give you clear information and a fair price? by Banner

Weight: Weight2; base n = from 313 to 358; total n = 1503; 1190 missing

Q26 To what extent do you trust your energy supplier to give you clear information and a fair price? Gas	Banner: S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulne-rable	Not vulne-rable	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly direct debit	Quart-erly direct debit	Cheq-ue, ca-sh or card	Prepa-yment or PA-YG meter	Mont-hly direct debit	Quart-erly direct debit	Cheq-ue, ca-sh or card	Prepa-yment or PA-YG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
NET: 1-3	3%	17%	17%	5%	12%	13%	13%	11%	13%	9%	18%	8%	10%	14%	8%	17%	11%	7%	14%	16%	13%	10%	8%	14%
NET: 8-10	38%	25%	33%	49%	39%	24%	36%	31%	32%	38%	29%	37%	41%	37%	38%	21%	33%	28%	41%	36%	34%	21%	32%	37%
Do not trust at all	3%	8%	7%	3%	6%	5%	7%	5%	7%	3%	10%	3%	2%	8%	4%	7%	5%	1%	10%	9%	5%	5%	2%	8%
2	0%	3%	2%	1%	2%	2%	2%	2%	2%	1%	2%	2%	3%	1%	0%	5%	3%	0%	0%	2%	3%	0%	0%	2%
3	0%	6%	8%	1%	4%	6%	5%	4%	4%	5%	7%	3%	5%	5%	4%	4%	4%	6%	3%	5%	5%	5%	5%	3%
4	0%	7%	6%	0%	2%	8%	5%	3%	5%	0%	6%	2%	3%	3%	3%	7%	5%	3%	3%	4%	3%	9%	6%	3%
5	21%	24%	20%	15%	19%	22%	19%	23%	21%	20%	20%	23%	11%	21%	21%	25%	19%	25%	7%	24%	18%	26%	17%	23%
6	24%	12%	7%	9%	10%	17%	10%	15%	10%	22%	12%	15%	8%	12%	14%	10%	13%	21%	13%	6%	13%	20%	19%	8%
7	14%	14%	17%	15%	16%	15%	15%	15%	16%	10%	14%	13%	21%	11%	14%	20%	17%	14%	21%	11%	18%	11%	17%	13%
8	21%	13%	13%	25%	21%	10%	17%	16%	16%	18%	13%	19%	26%	19%	18%	11%	16%	17%	22%	16%	18%	16%	20%	14%
9	3%	4%	9%	8%	6%	7%	7%	5%	6%	5%	5%	8%	3%	6%	8%	3%	8%	3%	5%	6%	6%	2%	2%	8%
Completely trust	14%	8%	10%	15%	12%	7%	12%	10%	10%	16%	11%	10%	12%	12%	12%	7%	9%	8%	15%	14%	9%	3%	10%	15%
Don't know	0%	1%	2%	6%	3%	1%	2%	2%	2%	0%	1%	1%	6%	1%	2%	0%	1%	2%	0%	3%	1%	2%	2%	2%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.75. Q27: Have you put any energy efficiency measures in place in your home in the last three years? For example, double glazing, cavity wall insulation, loft insulation, etc. Please do not include smaller measures such as energy saving lightbulbs. by Banner

Weight: Weight2; base n = from 1275 to 1503; total n = 1503; 228 missing

Q27: Have you put any energy efficiency measures in place in your home in the last three years? For example, double glazing, cavity wall insulation, loft insulation, etc. Please do not include smaller measures such as energy saving lightbulbs.	Banner: S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulner-able	Not vulner-able	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter	Mont-hly dir-ect de-bit	Quart-erly dir-ect de-bit	Cheq-ue, cas-h or card	Prepay-ment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Yes	40%	39%	39%	35%	41%	36%	35%	42%	37%↓	60%↑	37%	39%	38%	38%	39%	40%	44%↑	39%	35%	33%	44%	41%	36%	33%
No	51%	59%	60%	64%	57%	60%	62%↑	54%↓	60%↑	35%↓	61%	57%	59%	59%	58%	58%	55%	58%	62%	63%	53%	53%	62%	64%
Not sure	9%↑	3%	1%	1%	2%	4%	3%	3%	3%	4%	1%	3%	3%	4%	3%	2%	2%	4%	4%	3%	3%	6%	2%	3%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.76. Q28: Why haven't you put any energy efficiency measures in place in your home in the last three years? by Banner
Weight: Weight2; base n = from 781 to 935; total n = 1503; 722 missing

Q28. Why haven't you put any energy efficiency measures in place in your home in the last three years?	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulnerable	Not vulnerable	No	Yes	No	Yes	Urban location	Sub-urban location	Rural location	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment or PAYG meter	Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Cannot afford the initial outlay	22%	17%	13%	5%↓	16%	13%	13%	17%	14%	10%	17%	15%	13%	22%↑	15%	9%↓	12%	6%↓	14%	22%↑	11%	5%	15%	21%
Don't think they are needed	10%	13%	12%	10%	11%	12%	12%	11%	11%	22%	13%	10%	12%	9%	12%	16%	14%	14%	8%	10%	12%	7%	12%	11%
Lack of information	26%↑	13%	5%↓	3%↓	12%	9%	8%	14%	10%↓	32%↑	11%	12%	10%	8%	12%	13%	5%↓	10%	11%	16%↑	6%	24%	8%	14%
It would cause too much disruption	6%	9%	5%	4%	7%	6%	6%	7%	6%	11%	5%	8%	6%	5%	7%	8%	6%	8%	6%	7%	7%	18%	5%	10%
These were already in the home	16%↓	35%	42%↑	39%	35%	36%	35%	37%	36%	29%	28%↓	34%	43%↑	26%↓	36%	48%↑	46%↑	38%	31%	27%↓	35%	36%	40%↑	24%↓
Installed them more than 3 years ago	10%↓	20%↓	39%↑	53%↑	36%	28%	36%↑	25%↓	32%	11%	28%	28%	38%↑	26%	31%	33%	37%↑	41%↑	33%	18%↓	35%	28%	38%↑	8%↓
I rent my property/have no control over structural changes	22%	18%	10%	7%↓	15%	13%	14%	14%	14%	21%	20%↑	13%	11%	24%↑	12%	6%↓	5%↓	7%	12%	29%↑	6%	11%	11%	29%↑
Recently moved house	4%	6%↑	2%	1%	1%↓	4%	3%	4%	3%	4%	3%	3%	3%	3%	3%	4%	4%	2%	3%	3%	5%	7%	2%	3%
Other (please specify)	0%	5%	6%	8%	5%	5%	5%	6%	5%	5%	6%	4%	6%	3%	4%	8%	8%↑	5%	3%	3%	10%	4%	5%	4%
No reason	12%↑	5%	3%	4%	4%	6%	6%	3%	5%	0%	7%	4%	3%	7%	4%	3%	3%	7%	9%	5%	5%	8%	5%	4%
Not sure	6%	3%	1%	0%	1%	5%↑	2%	3%	2%	11%	2%	3%	2%	4%	2%	1%	1%	4%	1%	3%	3%	3%	1%↓	7%↑
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.77. Q30ai: Which of these initiatives, if any, would you want most from your [pipe: Q1 lower] supplier? by Banner
Weight: Weight2; base n = from 1275 to 1503; total n = 1503; 228 missing

Q30ai: Which of these initiatives, if any, would you want most from your [pipe: Q1 lower] supplier?	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
	18-24	25-44	45-64	65+	Vulnerable	Not vulnerable	No	Yes	No	Yes	Urban location	Sub-urban location	Rural location	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment or PAYG meter	Monthly direct debit	Quarterly direct debit	Cheque, cash or card	Prepayment or PAYG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Investing in projects to protect the environment	18%	19%	19%	18%	17%	20%	20%	17%	18%	24%	17%	21%	16%	13%↓	19%	29%↑	24%↑	16%	17%	14%	23%	27%	18%	18%
Supporting customers over the age of 60	6%↓	12%↓	23%↑	29%↑	22%↑	15%	19%	17%	18%	12%	17%	19%	19%	19%	20%	12%↓	17%	19%	18%	18%	15%	16%	21%	15%
Supporting other vulnerable customers (not only those over the age of 60)	18%	19%	19%	18%	19%	17%	19%	18%	18%	23%	15%	18%	21%	22%	17%	19%	19%	19%	19%	19%	15%	22%	20%	19%
Supporting customers who are less able to pay their bills	19%	20%	14%	13%	18%	16%	15%	20%	17%	11%	18%	18%	15%	21%	16%	13%	13%↓	15%	18%	23%↑	17%	11%	16%	23%
Improving reliability to reduce risk of supply loss	12%	8%	7%	8%	8%	8%	8%	8%	8%	9%	9%	7%	9%	8%	8%	9%	7%	11%	11%	6%	8%	4%	8%	5%
Connecting those not already on mains gas	14%	13%	8%	4%↓	8%	11%	10%	10%	10%	9%	11%	8%	10%	10%	10%	11%	10%	10%	7%	10%	10%	9%	8%	9%
Improving customer service	14%	9%	9%	10%	8%	13%	9%	12%	10%	12%	12%	9%	10%	8%	10%	8%	10%	10%	11%	11%	13%	11%	9%	11%
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure B.78. Q30aii want next from your supplier? by Banner
Weight: Weight2; base n = from 1275 to 1503; total n = 1503; 228 missing

	Banner																							
	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
Q30aii want next from your supplier	18-24	25-44	45-64	65+	Vulne-rable	Not vulne-rable	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly direct debit	Quart-erly direct debit	Cheq-ue, ca-sh or card	Prepa-yment or PA-YG meter	Mont-hly direct debit	Quart-erly direct debit	Cheq-ue, ca-sh or card	Prepa-yment or PA-YG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Investing in projects to protect the environment	9%	14%	12%	15%	13%	13%	14%	11%	13%	15%	10%	11%	17%	11%	13%	15%	14%	15%	10%	11%	15%	12%	14%	9%
Supporting customers over the age of 60	9%	13%	16%	17%	13%	16%	15%	14%	14%	23%	15%	13%	15%	12%	14%	19%	18%	10%	12%	14%	18%	8%	15%	12%
Supporting other vulnerable customers (not only those over the age of 60)	13%	19%	24%	24%	23%	19%	20%	21%	21%	18%	23%	21%	18%	20%	20%	22%	19%	23%	22%	20%	18%	17%	21%	21%
Supporting customers who are less able to pay their bills	24%	15%	14%	13%	15%	15%	14%	18%	15%	19%	15%	16%	15%	18%	16%	13%	13%	15%	18%	18%	14%	28%	15%	15%
Improving reliability to reduce risk of supply loss	16%	9%	8%	6%	9%	10%	10%	8%	9%	4%	12%	11%	6%	10%	10%	8%	10%	10%	10%	8%	12%	15%	8%	9%
Connecting those not already on mains gas	9%	7%	3%	5%	6%	6%	4%	8%	6%	5%	6%	5%	5%	6%	6%	5%	5%	6%	6%	6%	2%	9%	5%	9%
Improving customer service	13%	8%	8%	6%	9%	8%	9%	8%	9%	9%	9%	9%	8%	8%	9%	9%	9%	9%	8%	8%	9%	6%	7%	13%
Nothing else	6%	15%	14%	16%	12%	15%	14%	12%	14%	6%	11%	13%	15%	15%	11%	9%	13%	12%	15%	14%	12%	4%	15%	12%
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Figure B.79. Q30aiii also want from your supplier? by Banner
Weight: Weight2; base n = from 1122 to 1293; total n = 1503; 381 missing

	Banner																							
	S3: Can you tell me which of the following age categories applies to you?						Electricity engaged		Gas engaged		S12: In which type of location do you currently live?			QHIDINCOME: Income Brackets			Q5e: How do you pay for your electricity (including heating, lighting, appliances, etc.)?				Q5d: How do you pay for your home heating?			
Q30aiii also want from your supplier	18-24	25-44	45-64	65+	Vulne-rable	Not vulne-rable	No	Yes	No	Yes	Urban locat-ion	Sub-urban locat-ion	Rural locat-ion	Up to £15,-499	£15,-500 - £39,-999	£40,-000+	Mont-hly direct debit	Quart-erly direct debit	Cheq-ue, ca-sh or card	Prepa-yment or PA-YG meter	Mont-hly direct debit	Quart-erly direct debit	Cheq-ue, ca-sh or card	Prepa-yment or PA-YG meter
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Investing in projects to protect the environment	13%	13%	16%	14%	14%	14%	13%	15%	14%	10%	14%	16%	12%	16%	13%	15%	15%	10%	16%	13%	19%	5%	12%	15%
Supporting customers over the age of 60	7%	15%	14%	15%	14%	11%	14%	13%	13%	13%	13%	11%	16%	14%	13%	13%	13%	17%	12%	13%	11%	4%	15%	12%
Supporting other vulnerable customers (not only those over the age of 60)	11%	16%	18%	13%	14%	16%	14%	17%	15%	20%	14%	17%	16%	11%	16%	20%	15%	14%	16%	16%	13%	17%	16%	14%
Supporting customers who are less able to pay their bills	15%	14%	18%	18%	16%	16%	18%	14%	16%	17%	18%	16%	15%	17%	17%	14%	17%	16%	16%	14%	21%	24%	15%	17%
Improving reliability to reduce risk of supply loss	11%	10%	8%	10%	9%	10%	10%	9%	9%	13%	8%	10%	11%	10%	10%	10%	9%	8%	7%	11%	8%	17%	8%	11%
Connecting those not already on mains gas	14%	8%	6%	6%	7%	7%	6%	9%	8%	4%	9%	8%	6%	8%	8%	9%	7%	11%	9%	6%	8%	15%	8%	4%
Improving customer service	20%	12%	8%	7%	12%	11%	11%	11%	11%	13%	14%	11%	10%	14%	12%	8%	10%	10%	10%	15%	8%	7%	11%	19%
Nothing else	9%	12%	13%	17%	13%	14%	14%	12%	13%	11%	11%	11%	14%	11%	12%	11%	14%	14%	13%	12%	13%	11%	16%	8%
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Figure B.80. Q30b: If these [pipe: Num] initiatives were provided by your supplier, what is the most you would be willing to pay in addition to your current monthly energy bill to make this possible? [pipe: Hid_int] by Hid_int. Initiatives
Weight: Weight2; base n = 1503

Q30b: If these [pipe: Num] initiatives were provided by your supplier, what is the most you would be willing to pay in addition to your current monthly energy bill to make this possible?[pipe: Hid_int]	Hid_int. Initiatives							
	Investing in projects to protect the enviro-nment	Supporting customers over the age of 60	Supporting other vulnerable customers (not only those over the age of 60)	Supporting customers who are less able to pay their bills	Improving reliability to reduce risk of supply loss	Connec-ting those not alre-ady on mains gas	Improving customer service	**NET**
	%	%	%	%	%	%	%	%
Nothing	33%↓	41%	38%	36%↓	39%	33%↓	46%↑	**40%**
£1 per month more	17%	17%	16%	16%	14%	13%	12%	**15%**
£2 per month more	15%	16%	17%	16%	16%	16%	13%	**15%**
£3 per month more	13%↑	8%↓	10%	10%	10%	16%↑	12%	**10%**
£4 per month more	4%	3%	3%	4%	6%	4%	6%↑	**4%**
More than £5 per month	19%↑	15%	16%	17%	16%	17%	11%↓	**15%**
NET	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**
Average	1.27↑	1.02	1.09	1.18	1.17	1.29↑	1.00	**1.09**

Figure B.81. Q30b: If these [pipe: Num] initiatives were provided by your supplier, what is the most you would be willing to pay in addition to your current monthly energy bill to make this possible?[pipe: Hid_int] by Num: Number
Weight: Weight2; base n = 1503

Q30b: If these [pipe: Num] initiatives were provided by your supplier, what is the most you would be willing to pay in addition to your current monthly energy bill to make this possible?[pipe: Hid_int]	Num: Number			
	1	2	3	NET
	%	%	%	%
Nothing	58%↑	50%↑	35%↓	**40%**
£1 per month more	13%	17%	15%	**15%**
£2 per month more	12%	14%	16%	**15%**
£3 per month more	5%↓	7%	12%↑	**10%**
£4 per month more	1%↓	2%	4%↑	**4%**
More than £5 per month	12%	9%↓	17%↑	**15%**
NET	**100%**	**100%**	**100%**	**100%**
Average	.7↓	.7↓	1.2↑	**1.1**