Ipsos MORI
Social Research Institute

Research into the Priority Services Register and non financial support for vulnerable energy consumers

June 2013

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Contents

1. **Introduction and Methodology** 2
2. **Summary** 6
3. **Screening to obtain a sample of energy customers** 10
4. **Prevalence of potential vulnerability among GB energy customers** 11
   - Definitions of various vulnerable groups and their incidence 12
   - Multiple indicators of vulnerability 14
   - Vulnerability by social grade 15
   - Vulnerability by age 16
5. **Awareness on non-financial support and PSR services** 18
   - Prompted awareness of PSR services and free gas safety checks 21
6. **Being on a PSR** 23
   - Use of services 23
   - Use of non financial services among GB energy consumers 24
   - Use of non financial services among those aware of the services 25
   - Awareness of being on a PSR 26
   - Finding out about PSR services 26
7. **Sharing PSR information** 29
8. **Important non-financial services for vulnerable customers** 33
   - Important current services 33
   - Potential new services 34
9. **Conclusions** 37
   - Implications 37

Appendices 40

Questionnaire and topline results 40
Sample Profile 52

Introduction and Methodology

1. Introduction and Methodology

This is one of several pieces of research Ofgem has commissioned to develop a more detailed understanding of vulnerability, and the non financial support that vulnerable customers may need through a Priority Services Register (PSR)[1].

Ofgem commissioned Ipsos MORI to conduct a face-to-face survey representative of the population of Great Britain aged 15 years and over. The objective of the research was to achieve robust findings of energy customers' awareness, experiences and expectations of non-financial support provided by energy companies to customers who might be considered vulnerable.

The research vehicle chosen was Ipsos MORI's weekly omnibus survey, known as *Capibus*. The fieldwork dates were 15-21 February 2013 and 1,990 interviews were achieved.

All interviews were carried out in-home using computer-assisted personal interviewing (CAPI).

Selection of Respondents

Capibus uses up to 210 sampling points in Britain every week. ACORN[2] is employed to improve how representative the sample is across the social grades and is used to set quota controls specific to each interviewer location. By using this proven sample design, we represent all sub-sectors of the population – at a national and regional level.

Quality Control

We employ the strictest quality control procedures. Our interviewers are trained to a recognised standard and one-in-ten interviews are back-checked by telephone. Furthermore, we use the CAPI software to monitor both the overall length of each interview (the average interview length does not exceed 26 minutes) and the time taken over individual questions in the questionnaire.

In Great Britain, Ipsos MORI is ISO9001, BS7911 and ISO 20252 accredited – a mark of our commitment to quality.

Survey Content

The questionnaire was designed to explore:

- Eligibility for PSR services
- Awareness of PSR services and gas safety checks (spontaneous and prompted)
- Use of PSR services and gas safety checks
- Views on how data sharing could work under future arrangements for the PSR
- Which PSR services are viewed as most important

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[1] Energy suppliers are obliged to offer a range of free services, known as the priority services register, to their most vulnerable customers. These services are free to join and are available from all mains gas and electricity suppliers.

[2] **A C**lassification **O**f **R**esidential **N**eighbourhoods : is a geodemographic segmentation of the UK's population. It segments households, postcodes and neighbourhoods into 6 categories, 18 groups and 62 types. By analysing significant social factors and population behaviour, it provides precise information and an in-depth understanding of the different types of people

The report focuses on a range of non-financial services which energy companies are required to provide to customers who are defined as vulnerable using set criteria. These are:-

- The Priority Service Register services (quarterly meter readings, notice of planned interruptions and information about when energy supplies will be restored, services for people with visual or hearing impairments, password protection schemes, meter move services and bill nominee services). These services are currently available to customers who have a disability or long-term illness and/or who are of pensionable age; and

- Free gas safety checks which are provided to people who meet specified criteria, different to that for the PSR. Gas Safety Checks are available to home owners on means tested benefits who are elderly, disabled or chronically sick and either live alone (or with others who are all elderly, disabled, chronically sick or under 18), or are living with others where at least one child is under 5 years old.[3]

In order to establish eligibility for gas safety checks and/or PSR services, respondents were shown a screen which listed all the potential characteristics which could mean they would be eligible. These characteristics were displayed as they are by Ofgem and in energy company literature, so that respondents could self-define whether they met one or more of the eligibility criteria. As a result there is not a perfect correlation between, for example, those of pensionable age and those who later say they are aged over 65 (even allowing for some women who would be eligible sooner). Similarly, it is estimated that approximately 6.6 million people in the UK are eligible for Child Benefit which is now a means tested benefit, but our survey showed a lower percentage self-identifying themselves as being on means tested benefits. Self-defined eligibility is the measure used throughout the report because this is likely to be the best reflection of how people view themselves and consequently how people access these 'opt-in' support services.

A full copy of the questionnaire is appended.

Data Processing

All Capibus data is processed in-house by Ipsos MORI.

Weighting and filtering

A rim weighting system is applied which weights to Market Research Society (MRS) defined profiles for age, social grade, region and working status - within sex. The idea of rim weighting is to provide the 'best weighting', or least distorting, by using computing power to run a large number of solutions from which the best is chosen.

In order to correct minor deviations in terms of the generated sample profile week on week, omnibus services use a variety of weighting procedures. Clearly, the more effective the sampling the less the need to rely on weighting to resolve problems. The weighting is conducted at the GB level.

[3] See: http://www.gassaferegister.co.uk/advice/vulnerable_people.aspx

Interpretation of the data

Where percentages do not add up to 100, this may be due to computer rounding, multiple responses, or the exclusion of don't know categories. While the nationally representative sample comprised 1,990 interviews, most of the figures in this report are based on 1,526 adults who said they are solely or jointly responsible for the energy bills in their household.

Other relevant research

The other relevant reports are:

Ofgem Consumer First Panel[4] – deliberative research with over 100 members of the public utilising workshops to explore in detail consumer views about vulnerability and non-financial support needs in the Energy market

Qualitative research[5] with vulnerable (or potentially vulnerable) customers to explore their needs in detail.

Ref: 13-008745-01

[4] Ofgem Consumer First Panel – Research to inform Ofgem's review of the Priority Services Register, by Ipsos MORI. June 2013.

[5] Vulnerable Consumers and the Priority Services Register - A report prepared for Ofgem by BritainThinks. June 2013.

Summary

2. Summary

In February 2013, Ipsos MORI conducted 1,990 face to face interviews. These interviews included questions about awareness, use and attitudes towards non-financial support for vulnerable energy customers.

- This research focuses on non-financial support provided by energy companies, in particular Priority Service Registers and Gas Safety Checks. These have different eligibility criteria as discussed below.
- Just over three quarters (77%) of GB adults surveyed say that they are responsible or jointly responsible for the gas or electricity bills in their household. From this point on, these will be referred to as energy customers.

Eligibility

Respondents were shown a list of characteristics which could potentially mean they could be considered vulnerable and were asked to identify which, if any, applied to them. All the characteristics which lead to eligibility for PSR and Gas Safety Checks were included, alongside additional characteristics reflecting the potential for vulnerability to be defined more broadly in future.

- A third (32%) of GB energy customers identified themselves as having characteristics which would make them eligible for PSR services and/or free Gas Safety Checks from energy companies. Eligibility for these services is defined as all eligible for free gas safety checks (according to suppliers' definition outlined below) and in addition all eligible for PSR services (i.e. has a disability or has a long-term illness, or is of pensionable age).
- Around one in seven (15%) GB energy customers identified themselves as having characteristics which would make them eligible for free gas safety checks according to definitions used by most energy suppliers. Eligibility is defined as all who own their own home and have mains gas and provided any one of the following applies: the household receives means tested benefits and there are children under 5 living in the household; they have a disability; they have a long-term illness; or they are of pensionable age.
- The proportion of consumers who self-identify as eligible for free gas safety checks is lower if the criteria displayed on the Gas Safe Register website are used. The Gas Safe website says a free gas safety check may apply to home owners on means tested benefits who are elderly, disabled or chronically sick and either live alone or with others who are all elderly, disabled, chronically sick or under 18, or are living with others where at least one child is under 5 years old.[6] Under this definition, just 1% of GB energy customers are classified as eligible, in particular because only a small proportion say they are in receipt of means tested benefits.
- If a wider number of risk factors for potential vulnerability are included (these factors were identified by the project team in Ipsos MORI and Ofgem), the survey shows that about half (54%) of energy customers in the survey identify themselves as having

[6] See: http://www.gassaferegister.co.uk/advice/vulnerable_people.aspx

characteristics which might make them potentially vulnerable[7]. The definition includes all eligible to be on a Priority Service Register (PSR)/ and or eligible for free Gas Safety Checks plus those not eligible to be on a PSR/ eligible for free Gas Safety Checks but could be at risk because at least one of the following apply: they have no internet access; they have no formal qualifications; they are unemployed; their household receives means tested benefits; they sometimes struggle with reading or sums; or they do not normally speak English at home.

Awareness

- Around a quarter (24%) of GB energy customers surveyed say that they are aware of any non-financial support provided by energy companies for customers who might be considered vulnerable. Those in social grades AB are significantly more likely to be aware of support (31%), while those in social grades DE (18%) are significantly less likely to be aware. Similarly, older energy consumers (aged over 65) are more likely to say they are aware of support (28%).
- Around one in ten (9%) GB energy customers surveyed spontaneously mention at least one PSR service when asked to describe non-financial support provided by energy companies. One in seven (14%) customers in social grades AB spontaneously mention at least one PSR service, compared with less than one in ten in each of the other social grades (10% in C1; 7% in C2; and 5% in DE).
- The free gas safety check service is the most commonly mentioned non-financial service provided by energy companies. Six percent of GB energy customers spontaneously mention free gas safety checks. Services for people with hearing/ visual impairments is the most widely mentioned PSR service (mentioned by 5% of respondents), while the password protection scheme is the least frequently mentioned PSR service (mentioned by 1%).
- The free gas safety check service is also more widely recognised than the PSR services when respondents are prompted; about a quarter (26%) of GB energy customers say that they are aware that energy companies provide free gas safety checks for vulnerable customers. 'Free services for people with visual/ hearing impairments' is the most widely recognised PSR service, with about one in five (21%) saying they are aware that energy companies provide these. The meter move service (7%), the bill nominee service (8%), and the password protection scheme (9%) are the least recognised PSR services.
- In total, two in five (41%) GB energy customers are aware of at least one non-financial service when prompted. Those in social grades ABC1 are more likely to be aware of non-financial services, 44% compared with 38% of C2DEs.

Usage

- Free gas safety checks are also reported to be the most widely used service. Around a quarter (26%) of those aware of the service say they have had a free gas safety check in the past year, which equates to 7% of GB energy customers. However, some of these consumers are likely to be reporting on their use of other kinds of gas

[7] Ofgem has conducted two separate pieces of qualitative research with a range of customers, including vulnerable and potentially vulnerable customers, to understand which groups should be eligible to receive support services as the question is better discussed in a qualitative setting.

safety checks. There is evidence to suggest this includes a high proportion of people living in rented accommodation who might be confusing the checks landlords are required to perform with those provided by energy companies. If the people living in rented accommodation are removed, three percent of energy customers say they have received a free gas safety check in the past year.[8]

- Free quarterly meter readings are the most widely reported PSR service used, with around a quarter of those aware of the service saying that they have used it in the past year. This equates to 3% of GB energy customers. Again there is the possibility that some customers might be confusing meter reading in general with the specific, more frequent, service provided through PSR.
- One in twenty (5%) say that they are personally on a PSR or that a close family member/ someone they care for is on one. About a quarter (27%) of those personally on a PSR cannot recall how they found out about it[9].

Views on information sharing

GB energy customers were asked whether they would be happy for energy suppliers to share information about who is on their PSRs with other energy suppliers and energy distribution companies (e.g. so that a consumer does not have to opt-in multiple times if they change supplier or move area).

- Those surveyed are generally split in their attitudes to information sharing. About a third (35%) would be happy with energy suppliers sharing PSR information with other energy suppliers; and two in five (39%) would be happy with the information being shared to companies that own and maintain the pipes and wires through which energy is supplied (energy distribution companies).
- Those aware of PSR services are significantly more likely to be happy for such information to be shared; four in ten (42%) of those aware of PSR services (prompted) are happy for information to be shared with other energy suppliers (compared with 31% of those not aware of services), while almost half (46%) of those aware of PSR services are happy with data to be shared with distribution companies (compared with 35% of those not aware of any PSR services).
- Those who are on a PSR are significantly more likely to say they are ‘very’ happy for information to be shared with other suppliers and distribution companies; just over a quarter (26% and 25% respectively) are very happy compared with one in seven among those not on a PSR (14% and 15% respectively).

Importance of services

Respondents were asked to choose what they perceived to be the most important two or three services for energy companies to provide to customers who might be considered vulnerable, from a list of non-financial services that are currently available.[10]

[8] According to the Ofgem Annual report, in 2011 35,966 free gas safety checks were carried out which equates to less than 1% of gas consumers.
http://www.ofgem.gov.uk/Sustainability/SocAction/Monitoring/SoObMonitor/Documents1/SOR%20annual%20report%202011.pdf
[9] The qualitative research explores the implications of this lack of awareness in more detail.
[10] Ofgem will consider this broad indication of perceived priorities alongside more detailed research with a range of vulnerable groups who are likely to have specific requirements and preferences.

- ‘Free gas safety checks’ is the most frequently mentioned non-financial service that energy customers believe energy companies should offer to vulnerable people. Just under half (44%) of GB energy customer respondents selected this.
- Awareness of services appears to be correlated with perceptions of their importance. The three PSR services most widely recognised are: free services for people with visual/ hearing impairments; prior notice of planned interruptions to energy supply; and being kept informed about when an interrupted energy supply will be restored. Each of these is mentioned as important by around a quarter of all energy customer respondents (26%). The services which were less widely recognised such as the password protection scheme[11] were also less frequently identified as important.
- The password protection scheme (12%) and the meter move service (11%) are regarded as important by the fewest number of respondents; both these services are among the PSR services which were least well recognised by customers surveyed.

Respondents were also asked which of three possible new services that may be introduced in the future (identified through the qualitative research) they thought would be the most important to offer to customers who might be considered vulnerable.

- Of the three services, there was more support for ‘one to one advice service for vulnerable customers’ (selected by 35%), and ‘specialist staff trained to answer calls from those with specific needs’ (selected by 32%). There was less support for ‘an option to avoid automated menus for people who find these difficult’ (18%).

[11] Each service was briefly described during the interview to explain what the service entailed. See appended questionnaire for how each service was introduced.

3. Screening to obtain a sample of energy customers

The target population for the survey was energy customers in Great Britain (GB). A screener question was included at the start of the survey to obtain a sample of adult GB energy customers who are responsible or jointly responsible for the gas or electricity bills in their household. Three-quarters (77%) of the 1,990 GB adults aged 15 or over in the sample said that they are responsible or jointly responsible for the gas or electricity bills in their household. This provided a sample size of 1,526 GB energy customers, which is large enough to be representative of GB energy customers.

Younger people aged 15-34 are significantly less likely to be solely or jointly responsible for the gas or electricity bills in their household. A little over half (53%) said they are responsible while 47% said they are not. Over eight in ten (85%) of those aged 35-64 are responsible for their household energy bills, while over nine in ten (93%) of those aged 65 or over are responsible. Those working full time are more likely than people who are not working at all to be responsible for paying the energy bills in their household (80% compared with 74%).

4. Prevalence of potential vulnerability among GB energy customers

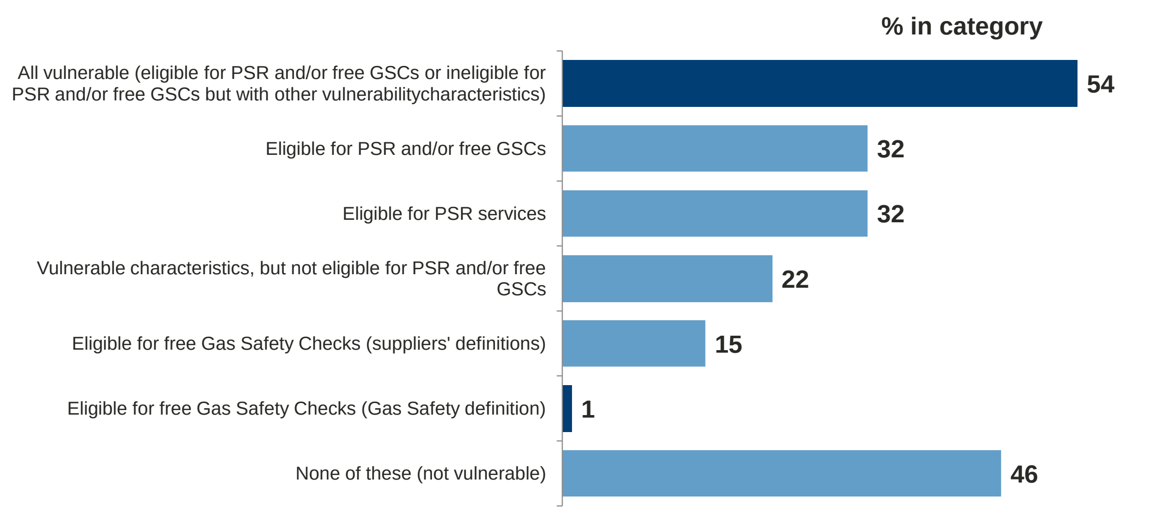
The questionnaire was structured so that the following groups of people could be identified:

- Respondents eligible for free Gas Safety Checks (GSC);
- Respondents eligible to be on Priority Service Registers (PSR)[12]; and
- Respondents not eligible for PSR/GSC but who self-identify as having certain characteristics / risk factors which could lead to vulnerability in the energy market[13].

To achieve this, respondents were asked which, if any, of a series of characteristics applied to them. This was designed to enable us to measure prevalence of different types of vulnerability, as well as understand if views and experiences differed among these groups. As chart 1 shows, this survey indicates that over half (54%) of GB energy customers could be considered potentially vulnerable, combining those currently eligible for PSR and/or GSC (32%) and those not currently eligible for PSR/GSC but who have characteristics that could mean they are vulnerable (22%).

Chart 1: Prevalence of vulnerability by various definitions

Depending on definitions, up to three in five GB energy bill payers could be considered vulnerable



Base: All responsible or jointly responsible for the gas or electricity bills in their household (1.526). Fieldwork dates: 15th – 21st February 2013.

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12 This group includes nearly all those eligible for a GSC (as the GSC criteria are similar but tighter as they also require home ownership and a gas supply). However the exception is those on means tested benefits with young children in their home who would be eligible for GSC but not PSR under current rules.

13 The definition includes those not eligible to be on a PSR but could be considered vulnerable because at least one of the following apply: they have no internet access; they have no formal qualifications; they are unemployed; their household receives means tested benefits; they sometimes struggle with reading or sums; or they do not normally speak English at home.

Definitions of various vulnerable groups and their incidence

The various categories used in this report are defined below.

Eligible for PSR

People who fall into any of the following categories are eligible for PSR services:

- They have a disability; or
- They have a long-term illness; or
- They are of pensionable age.

The key differences from the people eligible for free GSCs are that these people do not have to own their own home and may not have mains gas. Nearly one in three (32%) GB energy customers in the survey are considered eligible for PSR under this definition. This results in a base of 540 respondents in this report.

There is a significant overlap between those eligible for PSR and those eligible for free GSCs. Specifically, all those eligible for a free GSC will also be eligible for PSR, with the exception of those on benefits with young children in the home (who are eligible for GSC but not PSR). Just one person (under 1% of the sample) fell into this category.

The survey results show that people eligible for PSR services are more likely to be female than male (57% of women are eligible compared with 42% of men). As with the GSC, and mostly driven by the definition of eligibility, two thirds (66%) of those eligible for PSR services are aged over 65, and just three percent are aged under 35. Most of those eligible for PSR are not currently working (84% of those eligible), they are more likely to be on a low income (31% have a household income of under £13,500), and a high proportion have no formal qualifications (35% compared with 9% of those who are ineligible).

Those eligible for PSR services are more likely to be in lower social grades (31% DE compared with 21% in DE amongst those who are ineligible) unlike those eligible for GSCs, although they are more likely to be home owners (74% compared with 65% of those ineligible), which is similar to the pattern among those eligible for GSCs but not PSR.

Customers who are not currently eligible to be on a PSR or receive free GSCs but who have characteristics which make them at risk of being vulnerable

In order to estimate the proportion of GB energy customers who are not currently eligible to be on a PSR or receive free GSCs but who might be considered vulnerable for other reasons, a broad range of vulnerability risk factors was applied as outlined below. This range of potential risk factors was developed by the research team in conjunction with Ofgem. Anyone who falls into at least one of the following categories is considered potentially vulnerable in this report:

- No internet access in the household; or
- The respondent has no formal qualifications; or
- The respondent is unemployed; or
- The household receives means tested benefits; or
- The respondent says that they sometimes struggle with reading or sums; or

- English is not usually spoken in the household.

Just over one in five (22%) additional customers (i.e. not eligible for PSR or free GSCs) could be considered potentially vulnerable according to this criteria. The resulting base size is 342.

As with PSR eligibility, this group are slightly more likely to be female than male. By definition (because the definition excludes those eligible for GSC/PSR which includes most people aged over 65) they are a younger group. They are much more likely to be in social grades DE (39% compared with 20% of those who do not fall in this category). However, their working status is similar to that of the population as a whole. They are more likely to have no formal qualifications and less likely to have a degree or higher. They are also significantly more likely to be on a low income. Unlike the other categories discussed above, this group are less likely to be home owners and more likely to be living in rented accommodation.

Eligible for free gas safety checks

Two definitions of eligibility for free gas safety checks (GSC) are used for this research[14]. Each is outlined below.[15]

Gas Safe Register definition

Under the first definition, which is based on the criteria listed on the *Gas Safe Register* website, to be eligible for a free GSC people must own their home (with or without a mortgage) **and** receive means tested benefits **and** meet at least of the following criteria: they have a disability; or they have a long-term illness; or they are of pensionable age; or there are children under 5 living in the household.

Incidence of eligibility under this definition is very low. Less than one percent of GB energy customers in the sample are defined as eligible (just 10 out of 1,526 respondents). This is partially explained by the fact that just five percent of respondents said that their household receives means-tested benefits[16].

As there are so few people in this category it is not possible to say much about their demographics. However, none are employed full time, none have a degree or higher qualification, and all live in low income households. Most of the ten people in this category are aged 65 or above.

Supplier definition

A second definition of eligibility for gas safety checks is used throughout this report. This is the definition which appears on a number of GB energy companies' websites.[17] To be eligible

[14] This is because the formal obligation placed on suppliers appears to be different from the criteria by which some suppliers claim to assess eligibility.
[15] For the purposes of this report, only respondents with mains gas in their household were considered eligible for a gas safety check. This criteria does not appear in the formal list of criteria as, by definition, those without mains gas would be unlikely to apply for a gas safety check.
[16] As noted in the introduction, this figure is self-identified. In reality the proportion of people on means tested benefits is likely to be higher. In the survey people were not prompted with a list of possible means tested benefits which would have led to more accurate recall. The approach adopted replicates more closely respondent's own perceptions of whether they would meet the criteria (i.e. because energy suppliers do not list all means tested benefits) but is likely to underestimate the actual proportion of people in receipt of these benefits.
[17] For example, see http://www.npower.com/idc/groups/wcms_content/@wcms/@busi/documents/digitalassets/free_gas_safety_checks_pdf.pdf

under this definition people must meet the following criteria: Own their home (with or without a mortgage), **plus meet at least one** of the following: their household receives means tested benefits and there are children under 5 living in household; or they have a disability; or they have a long-term illness; or they are of pensionable age.

Incidence under this definition is much higher than under the first definition; around one in six (15%) GB energy customers surveyed are defined as eligible, providing a base size of 243 customers.

Again, most of the people in this category (84%) are aged 65 or above. However, the demographics of this group are different from those in the first definition as being in receipt of means tested benefits is not a requirement but home ownership is.

The people who are eligible for free GSCs under the supplier definition are more likely than GB energy customers overall to be in the social grade AB (33% compared with 26% in the population who are ineligible). However, they are significantly less likely to be working currently (92% compared with 36% of those ineligible) and are on lower household incomes than those who are ineligible, which might suggest that most are classified as AB as a result of their professional pension rather than current job. People eligible under the supplier definition are also likely to have fewer formal qualifications than those who are ineligible – again this could be a result of the high number of those aged 65 and over in this category, who typically have fewer formal qualifications. Two in five (39%) over 65s in the sample do not have any formal qualifications, compared with an average of 16% across all age groups.

Multiple indicators of vulnerability

The table below outlines the proportion of people who indicated that a statement which might indicate a risk factor of vulnerability applied to them. Being of pensionable age was the most commonly mentioned indicator, although not all people aged over 65 identified themselves as falling into this category.

Q. Can you tell me whether any of the following statements apply to you?
(Multicode question)

	% yes
Base: All responsible or jointly responsible for the gas or electricity bills in their household	*(1,526)* *%*
I am of pensionable age (i.e. eligible to claim the state pension)	23
There are children under 5 living in my household	11
I have a long term illness	10
I have a disability	8
My household receives means-tested benefits	5
At home we usually do not speak English	2
I sometimes struggle with reading or sums	1
None of these	54

Source: Ipsos MORI

As would be expected, people who self-identify into the categories above might fit into more than one of the criteria. For example, one third (34%) of those who have a long term illness also say they have a disability. The proportion of those who are of pensionable age who say they have a disability (15%) or long term illness (17%) is significantly higher than the proportions of those in the general population who have either. Similarly, as would be expected, those in households on means tested benefits are more likely to say they have a disability (25%) or long term illness (30%) although the base for this group is only 88 people.

The percentage of GB energy consumers with other characteristics which could make them at risk of being vulnerable were taken from separate questions. The prevalence of these characteristics among energy consumers is:

- no formal qualifications (18% of all energy consumers),
- who are not working (44% of all energy consumers),
- who have no internet access (15% of all energy consumers)

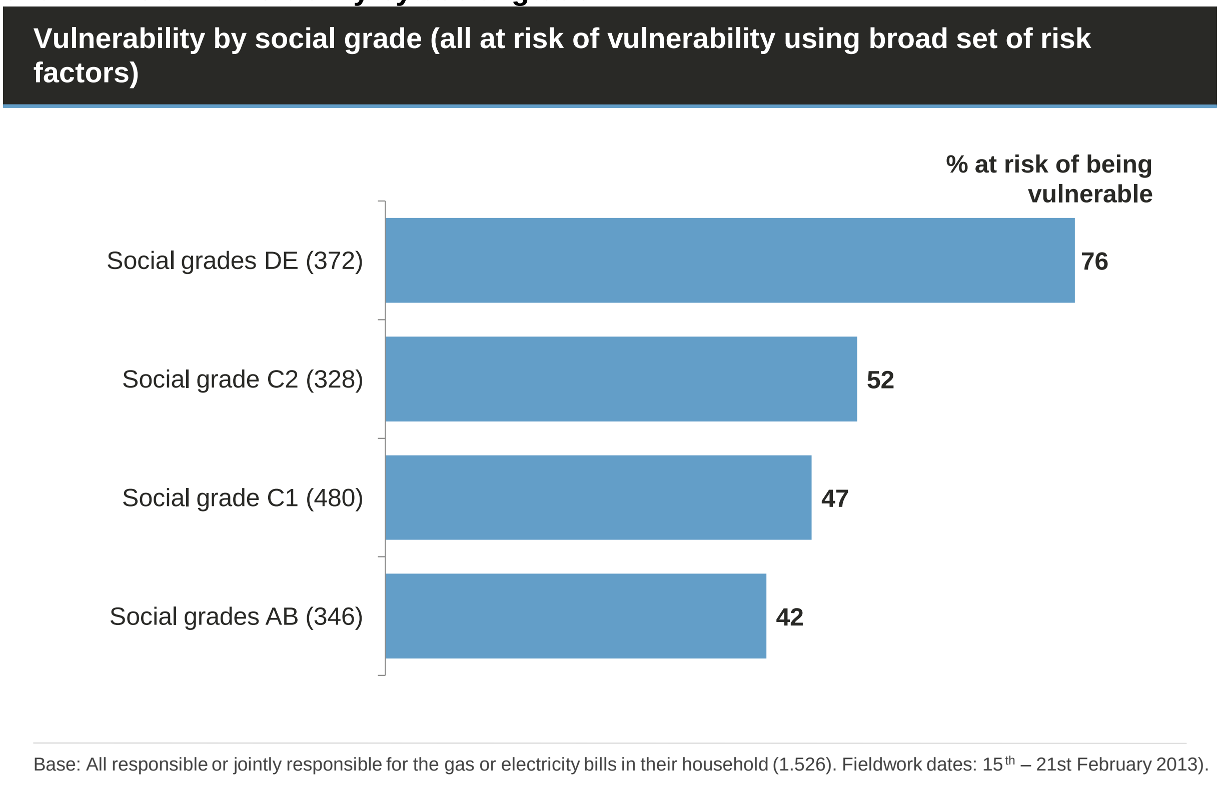
Looking at these wider risk factors for vulnerability in more detail, having no formal qualifications, not working and having no internet access are all more common among those who say they are of pensionable age, disabled or have a long term illness.

The numbers of people who did not speak English or who said they had problems with reading and sums were too small to conduct a further sub-group analysis.

Vulnerability by social grade

Energy customers who are in social grades DE are more likely to be considered vulnerable by any definition. While around half (54%) of all customers in the sample could be considered potentially vulnerable, three quarters (76%) of customers in social grades DE could be considered potentially vulnerable using this same definition. Risk factors for vulnerability are prevalent in other social grades, but to a lesser extent. Around half of customers in social grades C2 (52%) and C1 (47%) could be considered potentially vulnerable by the broadest definition, while around two in five (42%) in social grades AB could be considered so by the same definition (see chart 2).

Chart 2: Total vulnerability by social grade



Those in social grades DE are also significantly more likely to be eligible to be on a PSR. Two in five (42%) energy customers in social grades DE are eligible whereas around three in ten in social grades AB (31%), C1 (28%) and C2 (28%) are eligible.

The proportion of GB energy customers who are not eligible for PSR or GSC, but who could be defined as potentially vulnerable using the risk factors described above is again higher for those in lower social grades.

Respondents were asked whether a number of statements apply to them to help establish whether they are defined as vulnerable[18]. Those in social grades DE are significantly more likely to have either a long-term illness or disability: one in six (17%) say they have a long-term illness compared with one in ten overall (10%) and a similar proportion (15%) say they have a long-term disability, compared with one in twelve (8%) overall. Less than one in twenty (4%) of those who work full time say they have a long term illness, and only 2% of those working full time say they have a disability.

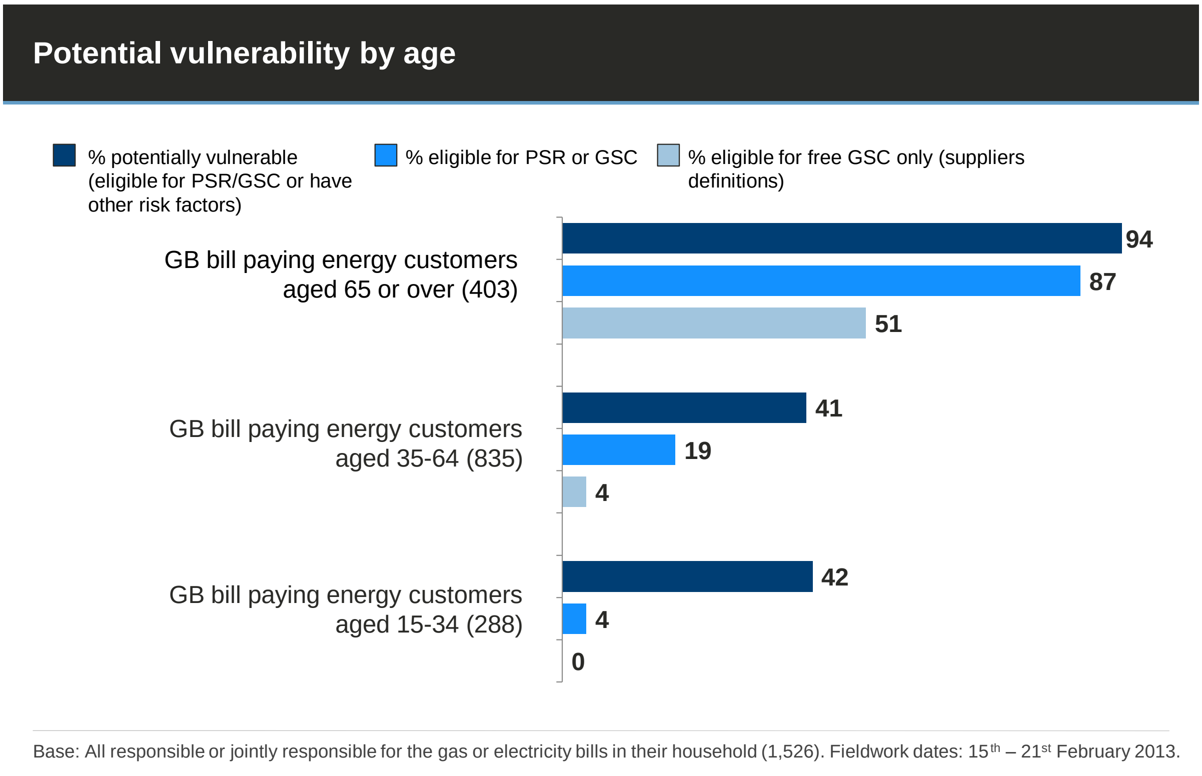
Vulnerability by age

As might be expected given the definitions, GB energy customers aged 65 or over are significantly more likely to be defined as eligible for free gas safety checks, to be eligible for PSR support and to be considered at risk of being vulnerable. Half (51%) of energy customers in this age group are considered eligible for free gas safety checks by the definition of eligibility that is typically used by energy suppliers[19], while around nine in ten

[18] See appendix for questionnaire
[19] i.e. a definition that does not require people to be on means tested benefits in order to be eligible (unless they have children)

(87%) are eligible for PSR services[20]. Younger age groups in the sample, particularly those aged below 35 years, are less likely to be eligible for PSR or GSC support currently, although the proportion who might be considered potentially vulnerable based on a wider set of risk factors (as outlined above) is similar to that of those aged 35 to 64 (see chart 4).

Chart 3: Vulnerability by age



[20] As noted in the introduction, this could be expected to be higher given that, in theory, all people currently aged 65 or above should be of pensionable age and therefore eligible for PSR services. However, not all those people who told us they were aged over 65 said that they were "of pensionable age"

5. Awareness on non-financial support and PSR services

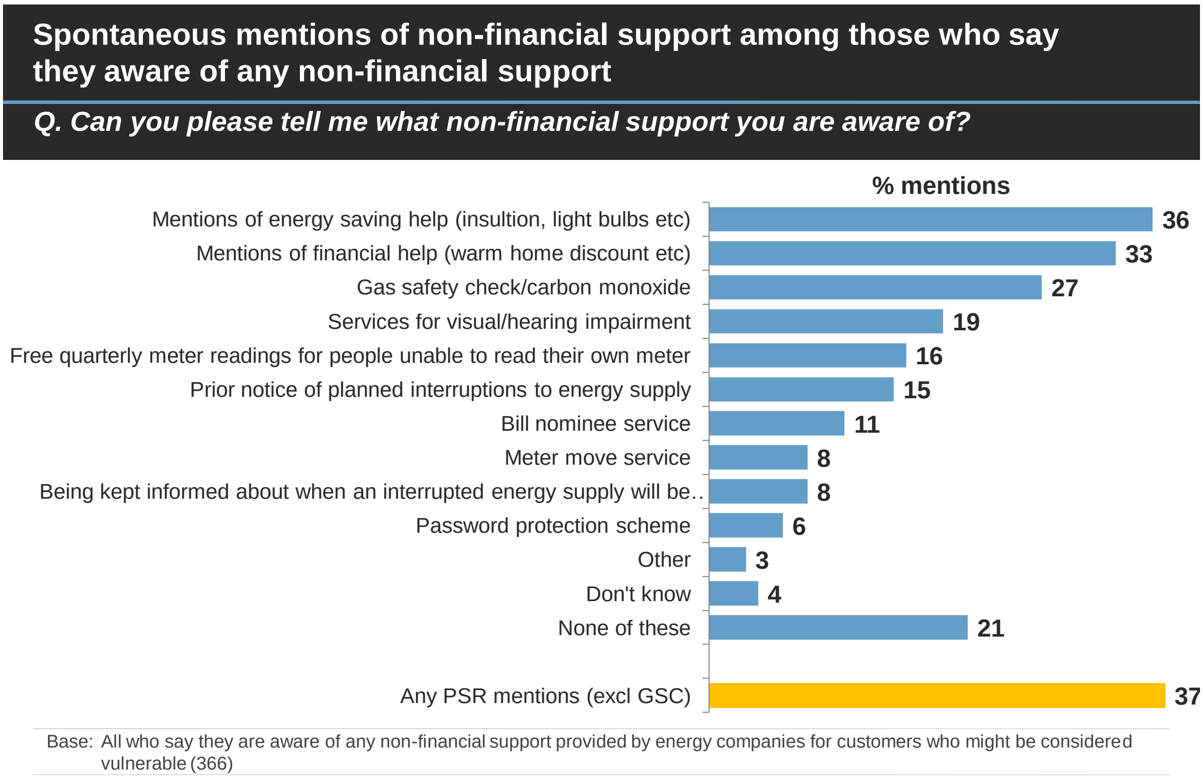
Around a quarter (24%) of GB energy customers say they are aware of non-financial support provided by energy companies for customers that might be considered vulnerable. Energy customers who are more likely to say that they are aware of non-financial support include those in social grades AB (31% aware compared with 24% of all energy customers); those aged 65+ (28% aware); and home owners (27% aware). People in social grades DE are significantly less likely to be aware of this (18%), despite being more likely to be defined as vulnerable. Similarly, customers with no formal qualifications are less likely to say that they are aware of non-financial support (15%).

Those who fall into any of the categories outlined in the previous chapter (i.e. eligible for PSR/GSC or having characteristics which make them at risk of being vulnerable) are no more or less likely than respondents as a whole to say that they have heard of non-financial support. The small proportion in the sample who say that they are actually on a PSR, or know close family members or people they care for on one, are more likely to say they are aware of non-financial support provided by energy companies for customers who might be considered vulnerable (46% aware).

Customers surveyed who said they were aware of non-financial support were asked, without prompting, to describe the non-financial support that they are aware of[21]. As the following chart shows, mentions were made of energy saving help (36%), and financial help (33%), neither of which are PSR services. Free gas safety checks (27%) are the most commonly mentioned of the PSR and GSC services currently provided (see chart 4).

[21] This question was not prompted, but was coded to a list (with an “other – specify” option). The description of financial help provided to the interviewer included the examples of “warm home discount or social tariff / winter fuel allowance / help with bills / cheapest tariff advice” and examples of energy saving help included “insulation, light bulbs etc”. These were included in the list because, even though people were asked to give examples of non-financial help, they nonetheless named examples which would be considered financial.

Chart 4: Spontaneous mentions of non-financial support

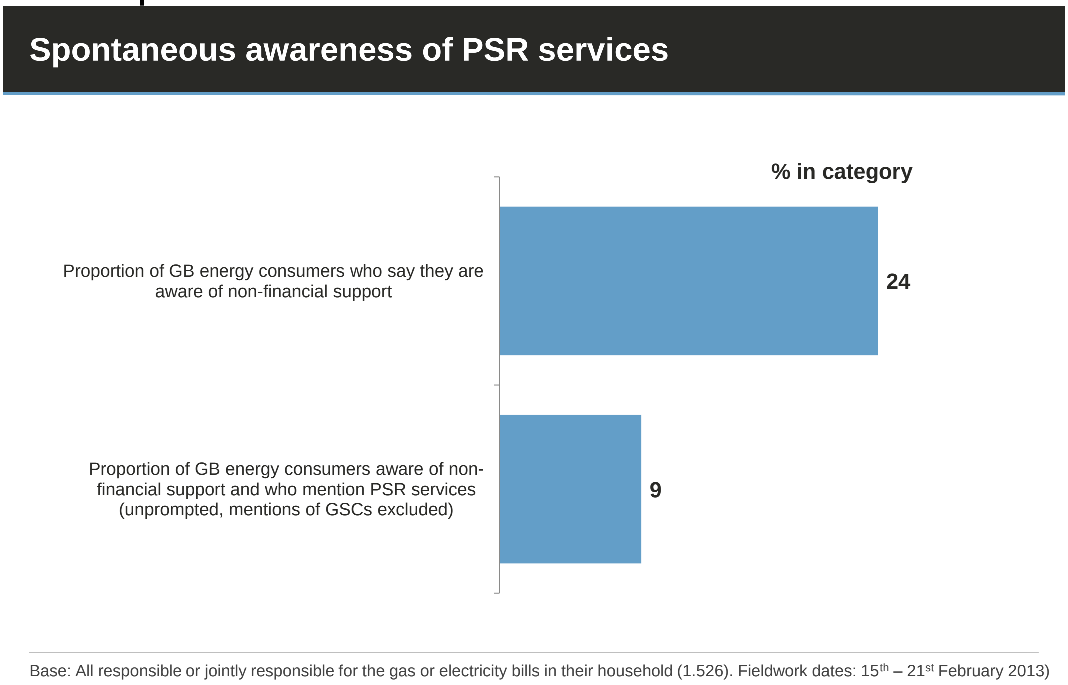


'Services for people with visual or hearing impairments', such as billing in Braille, large print and accessible ways to make a complaint, is the type of PSR support most widely mentioned spontaneously; around one in five (19%) of those surveyed who say they are aware of non-financial support mention this. The password protection scheme is the least widely mentioned type of PSR support (mentioned by 6% of those aware of non-financial support).

Just under two in five (37%) of those who claim awareness of non-financial support mention at least one PSR service, which equates to to fewer than one in ten (9%) GB energy customers overall.

Chart 5 outlines the difference between those who say they are aware of non-financial support provided by energy companies (24%) and those who are able to mention at least one PSR service (excluding gas safety checks) when asked to describe the non-financial support that they are aware of (9%). This means that 15% of GB energy customers said they were aware of non-financial support but then did not name any PSR examples when asked to say which services they were aware of.

Chart 5: Spontaneous awareness of PSR services

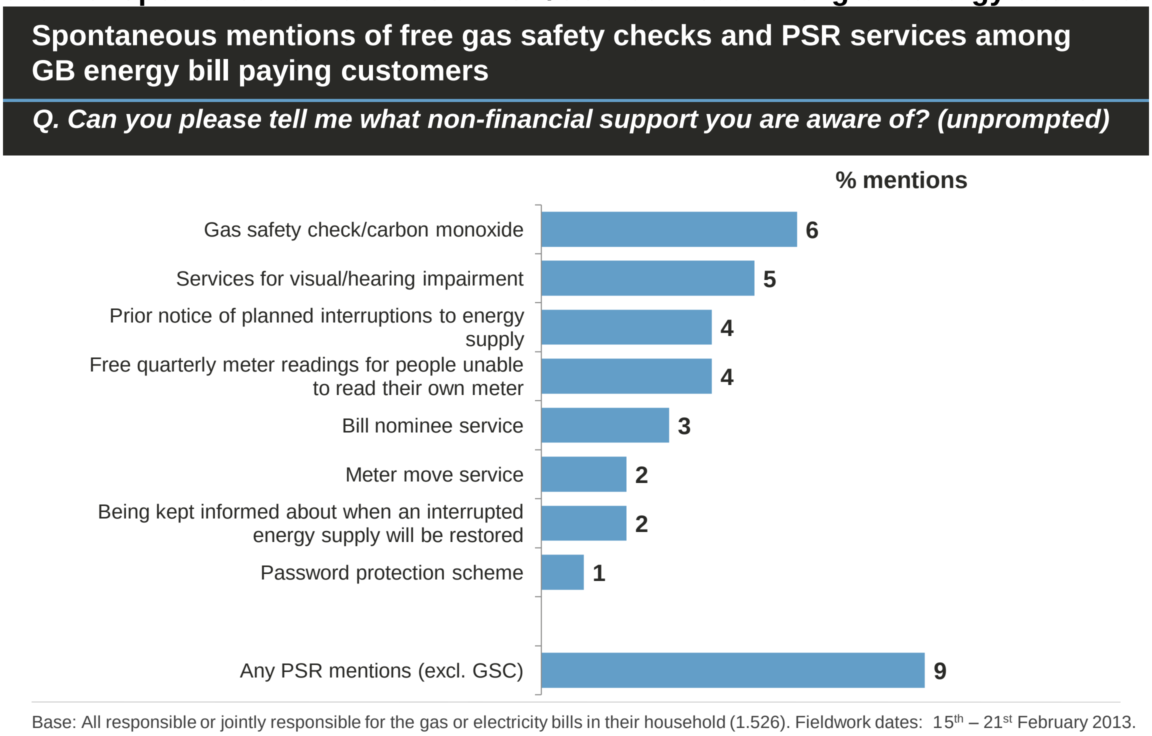


Rebasing the data[22] to look at spontaneous mentions among the whole sample of GB energy customers, free gas safety checks are mentioned by six percent of all customers, while five percent mention services for people with visual/ hearing impairments. The proportion who spontaneously mention the password protection scheme is just one percent of GB energy customers in the overall sample.

Chart 6 outlines spontaneous mentions of free gas safety checks and all PSR services as a proportion of GB energy customers overall.

[22] i.e. Using the same data to calculate the percentage of the GB energy customer population who were aware of specific services instead of the percentage of those who said they were aware of the services generally. This is helpful because it gives a better idea of how many people in the whole population are aware, whereas basing the percentage on those who were aware of a service is more helpful for showing the differences in awareness of the different services.

Chart 6: Spontaneous mentions of PSR/GSC services among GB energy customers



Along with being more likely to say that they are aware of non-financial services provided by energy companies, GB energy customers in social grades AB are also more likely to be aware of specific PSR services. One in seven (14%) customers in social grades AB mention at least one PSR service without prompting, compared with significantly lower proportions in each of the other social grades (10% in C1; 7% in C2; and 5% in DE).

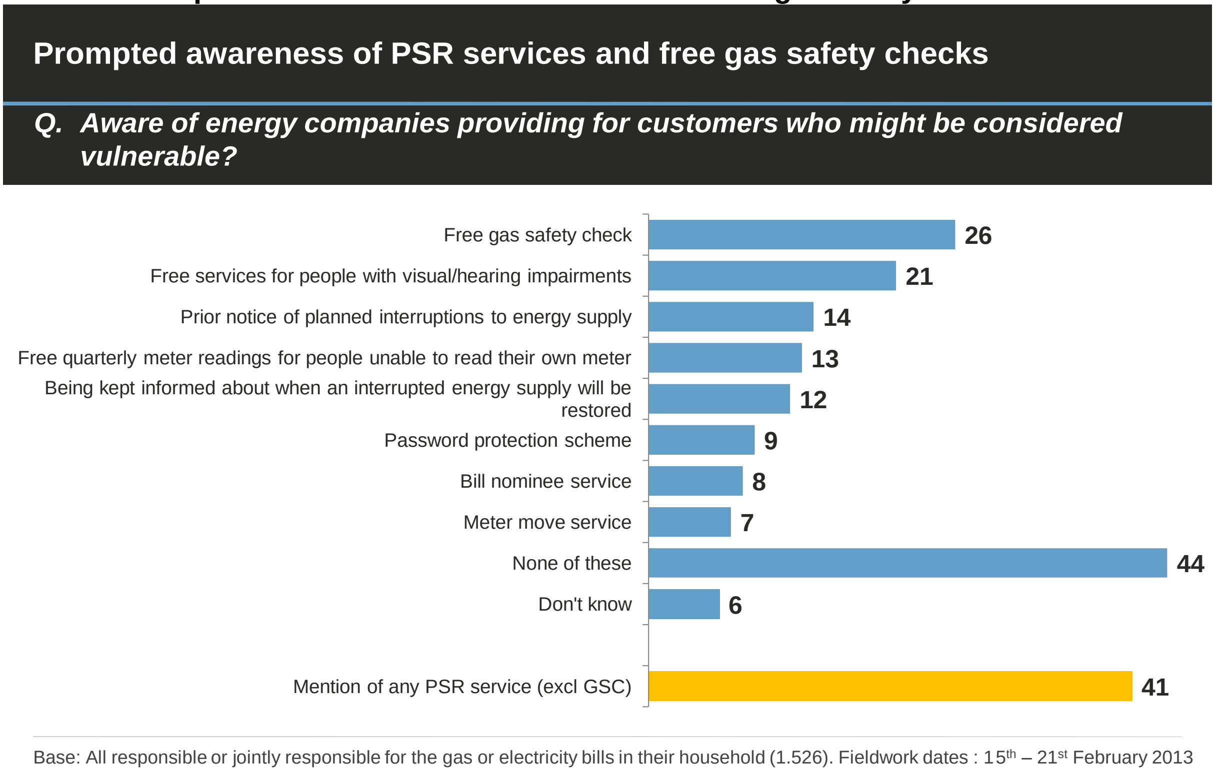
As would be expected, GB energy customers who say they or a close family member or someone they care for is on a PSR are significantly more likely to mention PSR services. However, only about a quarter of this group do so (27% compared with 9% among all GB energy customers surveyed).

Prompted awareness of PSR services and free gas safety checks

Regardless of their spontaneous awareness, all GB energy customers in the sample were asked, with prompting, if they were aware of free gas safety checks and each of the individual PSR services currently provided. GB energy customers are significantly more likely to say that they are aware of PSR services and free gas safety checks when prompted. Four in ten (41%) say that they are aware of at least one PSR service (excluding free gas safety checks) when shown a list of PSR services, compared with 9% unprompted. Around a quarter (26%) say that they aware of free gas safety checks when prompted compared with around one in twenty (6%) who mention this service spontaneously.

However, three in five (59%) are not aware of any PSR services when prompted; and over two in five (44%) are not aware of any PSR services **or** free gas safety checks (see chart 7).

Chart 7: Prompted awareness of PSR services and free gas safety checks



GB energy customers in social grade C2 are significantly less likely to be aware of any PSR services (36% of C2 customers in the sample say they are aware of at least one of the PSR services compared with 41% overall). However, those in social grades DE are *not* significantly less likely than consumers overall to say they are aware of at least one PSR service (40%).

Customers eligible for PSR services are more likely than those who are ineligible to mention being aware of *any* PSR service (46% compared with 39%). In particular, they are more likely to say that they are aware of 'prior to notice of planned interruptions to energy supply' (18% compared with 12%) and 'being kept informed about when an interrupted energy supply will be restored' (16% compared with 11%).

As would be expected, customers who say they are on a PSR, or know close family members or people they care for are on one, are significantly more likely to be aware of at least one PSR service when prompted (71% mention at least one PSR service compared with 40% of those who are not on a PSR).

6. Being on a PSR

Use of services

Those who were aware of free gas safety checks (GSCs) or a PSR service (50% of energy customers) were asked if they had used any of the services that they were aware of during the past year. Around one in five (19%) of these respondents said that they had used at least one of the services in the past twelve months. This is the equivalent of one in ten (10%) GB energy customers overall and is broadly in line with Ofgem's industry data on the number of people on PSRs. Ofgem's 2011 Report of Domestic Suppliers' Social Obligations states that in that year around eight percent of GB gas and electricity customers were listed on energy suppliers' PSRs.[23]

The figures in the previous paragraph include all people who were aware of PSR services, regardless of whether they were eligible to receive them. As would be anticipated, reported use of these services (PSR and GSC) among those defined by the survey as eligible is higher – a quarter (25%) of those eligible and who are aware of non financial services say they have used at least one over the past year.

Using the same figures[24] to consider the proportion of GB energy customers overall who use PSR/GSC services, one in six (16%) customers who are eligible for PSR services report that they have used at least one of the services in the past year.

There could be a number of explanations for this low use of PSR services among those eligible. The findings show that uptake of PSR services/ free GSCs is low among a key group who are eligible: those of pensionable age. Only 14% of energy customers aged 65 or over say they have used at least one PSR service over the past year (excluding free GSCs); this is only 4 percentage points above the figure for all consumers[25]. Eight percent of those aged 65 or over say they have had a free gas safety check in the past year.

It is important to note that some of those who say they have used a PSR service in the past year were apparently not eligible according to their survey responses. Indeed, one in twelve (8%) of those of those apparently not eligible to receive this support from suppliers say they have used these services in the past twelve months. The survey data itself cannot explain this anomaly but potential reasons could include misreporting of eligibility (e.g. people not classifying themselves as disabled or of pensionable age when they would be considered by an energy company to fit the criteria) and/or energy companies not requiring people to fulfil the eligibility criteria to receive a service and/or misinterpretations of the service itself (for example, confusing free gas safety checks provided by a supplier with free gas safety checks provided by a landlord).

23 http://www.ofgem.gov.uk/Sustainability/SocAction/Monitoring/SoObMonitor/Documents1/SOR%20annual%20report%202011.pdf

24 Respondents who said that they were not aware of any non-financial services when prompted were not asked about their use of these services. For the purposes of logic and clarity, it was assumed that those who say that they are not aware of any non-financial services when prompted would not have used any of these services over the past year. However, it is legitimate to re-base the same figures to show what proportion of the GB energy consumer population consequently has used the services.

25 The qualitative research looks at this issue in more detail, and in particular explores the extent to which people of pensionable age believe they require additional support as a result of their age.

Use of non financial services among GB energy consumers

The data suggests that free gas safety checks are the most widely used service among GB energy customers surveyed; seven percent say that they have had a free gas safety check in the past year. However, these figures include people living in rented accommodation who are likely to have received a gas safety check paid for by their landlord rather than their energy supplier. If we exclude those living in rented accommodation on the grounds that they would be ineligible, then three percent of GB energy consumers say they have had a free GSC in the past year. [26]

Chart 8: Use of free gas safety checks and PSR services

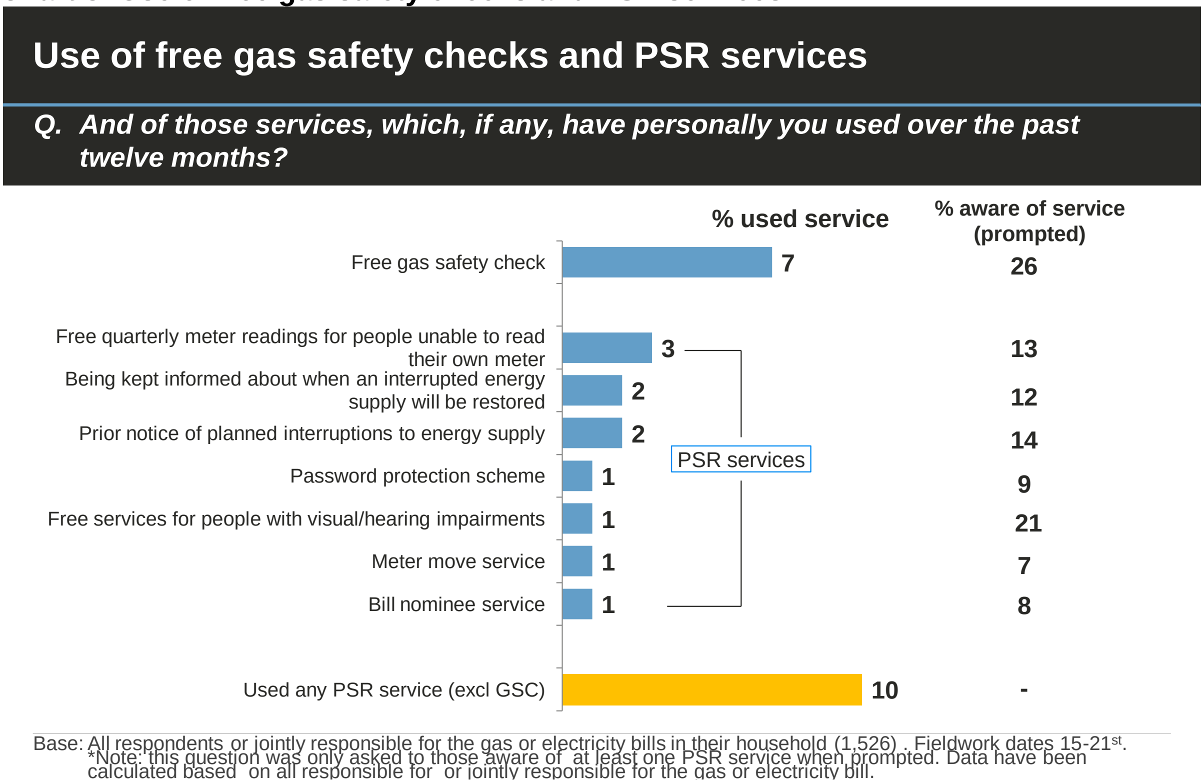


Chart 8 shows that ‘free quarterly meter readings’ is the most widely used service overall (excluding free gas safety checks), with three percent of GB energy customers in the sample saying they have used that service in the past year. However, the proportions that use this PSR service and the other PSR services are close, and variations between the percentage of people using each specific service are not statistically significant.

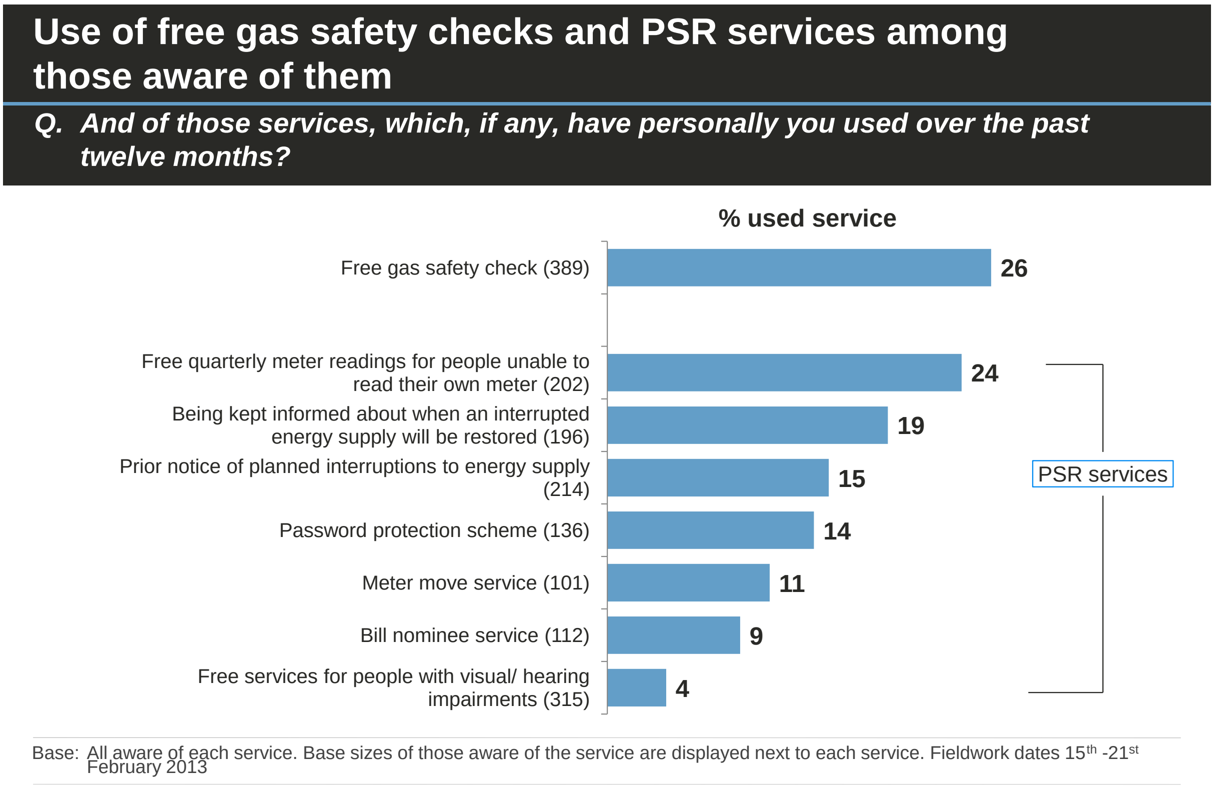
Energy customers in rented accommodation are more likely to say that they have had free quarterly meter readings (6% compared with 2% of homeowners), as are those with a broader set of characteristics which put them at risk of being vulnerable (5% compared with 1% of customers with no risk factors).

[26] According to the Ofgem Annual report, in 2011 35,966 free gas safety checks were carried out which equates to less than 1% of gas consumers.
http://www.ofgem.gov.uk/Sustainability/SocAction/Monitoring/SoObMonitor/Documents1/SOR%20annual%20report%202011.pdf

Use of non financial services among those aware of the services

In addition to considering prevalence of take-up at a national level, it can also be useful to look at take-up among those aware of the services available. Around a quarter (26%) of those in the sample who are aware of free gas safety checks say that they have had one in the past year. Among specific PSR services, 'free quarterly meter readings' is the most widely used service by those aware of the service, with about a quarter (24%) of those aware of this service saying they have used this service in the past year. Free services for people with visual/ hearing impairments is the least widely used service by those aware of it; only four percent of those who say they are aware of this service say that they has used it in the past year (see chart 9).

Chart 9: Use of free gas safety checks and specific PSR services among those aware of them



Of the people in the sample who are both aware of non-financial services provided by energy companies to vulnerable customers, and who are eligible to receive those services, a quarter (25%) say they have used at least one PSR service, and just under two thirds (64%) say they have not used any of these services and have not had a free annual gas safety check.

Awareness of being on a PSR

In order to establish whether people knew they were on a PSR, the following text was read out in the interview:

"Energy companies have an obligation to maintain a Priority Services Register. The Priority Service Register is a list of consumers who are eligible for non-financial support from their supplier like the examples we've been discussing. People are added to the list where they have asked to be included on it, or where someone that the customer knows has asked on their behalf. Eligible customers include people of pensionable age, people who have a disability or have who have a chronic sickness. Each energy company has its own list of consumers. Some suppliers use different names for their PSRs, the different names are displayed on this screen."

After hearing this explanation, one in twenty (5%) GB energy customers say that they are personally on a PSR. Those eligible for PSR are as likely to say that they are on a PSR as those who are ineligible, (6% of those eligible believe they are on it compared to 4% of those ineligible which is not a statistically significant difference). If pensioners are excluded[27], customers eligible for PSR for other reasons are more likely to say they are on a PSR than those who are ineligible, though still only around one in ten (9%) of those eligible (for reasons other than being of pensionable age) say that they are on one. Energy customers with a disability are significantly more likely to be aware of being on a PSR compared with the other potentially vulnerable groups (13% say they are personally on a PSR), although they were not significantly more likely to have used any particular PSR service.

Customers were also asked if, as far as they were aware, any close family members or people they cared for were on a PSR; two percent said that someone they know is. There is a large amount of overlap between those currently on a PSR and those who know someone else who is on a PSR. Only a very small number of energy consumers (less than one percent) are aware of family/friends on a PSR but are not on a PSR themselves.

Finding out about PSR services

Respondents who said that they are personally on a PSR, or are close to someone who is, were asked how they or their family members/ people they cared for found out about the PSR[28]. As chart 10 shows, being told about the PSR by a friend/ family member (15%) is the most widely mentioned information source among those personally on a PSR, followed by information directly from the energy supplier (11%). About a quarter (27%) cannot recall how they found out about the PSR. Please note, due to the low number of people who were aware they were on a PSR, the base for this question is just 77 people so the percentages should be considered indicative.

[27] In the Consumer First Panel Year 5, Wave 1, a number of participants of pensionable age did not feel that they should be considered vulnerable and did not expect any additional services as a result of their age alone.
[28] Respondents were invited to give their answer and the interviewer coded their response to a pre-coded list. If their answer did not fit the pre-codes an 'other – specify' option was provided.

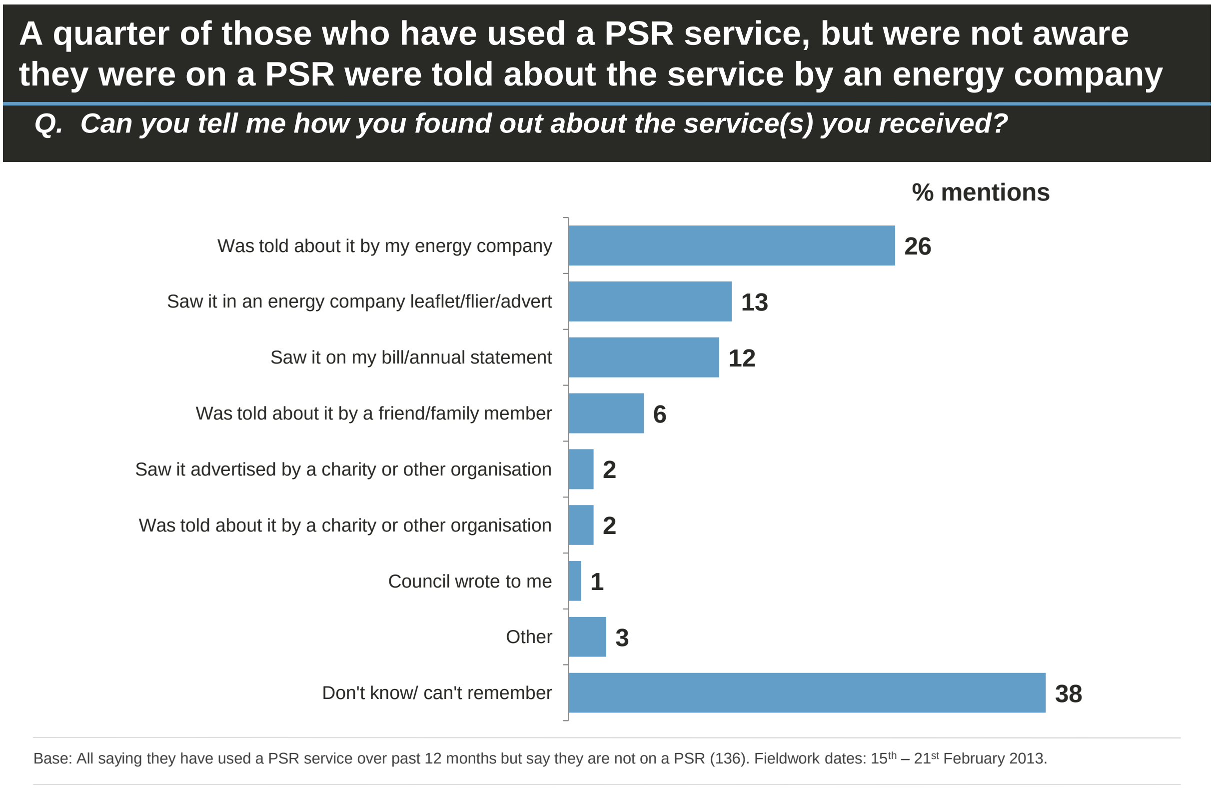
Chart 10: How those personally on a PSR found out about it

Base: All personally on a PSR (77). Fieldwork date: 15th – 21st February 2013

The pattern is similar for how family members/ people they care for got onto a PSR, but the base size (35) is too low for meaningful analysis.

Those who said they had used a PSR service in the past year, but said that they were not aware that they are on a PSR, were also asked how they found out about the services they had used. Again the base is relatively small (136 people) so percentages should be considered indicative. Mentions of being told about the services by the energy company are higher here, with around a quarter (26%) saying that they were told about the service(s) by their energy company. A significant minority (38%) say they cannot recall how they found out about the services, which is much higher than any of the individual information sources mentioned (see chart 11).

Chart 11: How those who used PSR services over the past year without realising they were on a PSR found out about the services



7. Sharing PSR information

GB energy customers were asked how happy they would be with:

a) Energy suppliers sharing information of who is on their PSRs with other energy suppliers if they moved house or supplier; and

b) Their energy supplier sharing information of who is on their PSR with the companies that own and maintain the pipes and wires through which energy is supplied to their homes[29].

For context, the following text was read out to respondents before the question was asked:

"Currently, eligible customers are added to a supplier's Priority Services Register (PSR) if they ask to be added to it, or someone they know asks on their behalf. At the moment, if a customer on a company's PSR switches supplier or moves house, they need to ask again to be added to their new supplier's PSR, as the energy companies do not share this information.

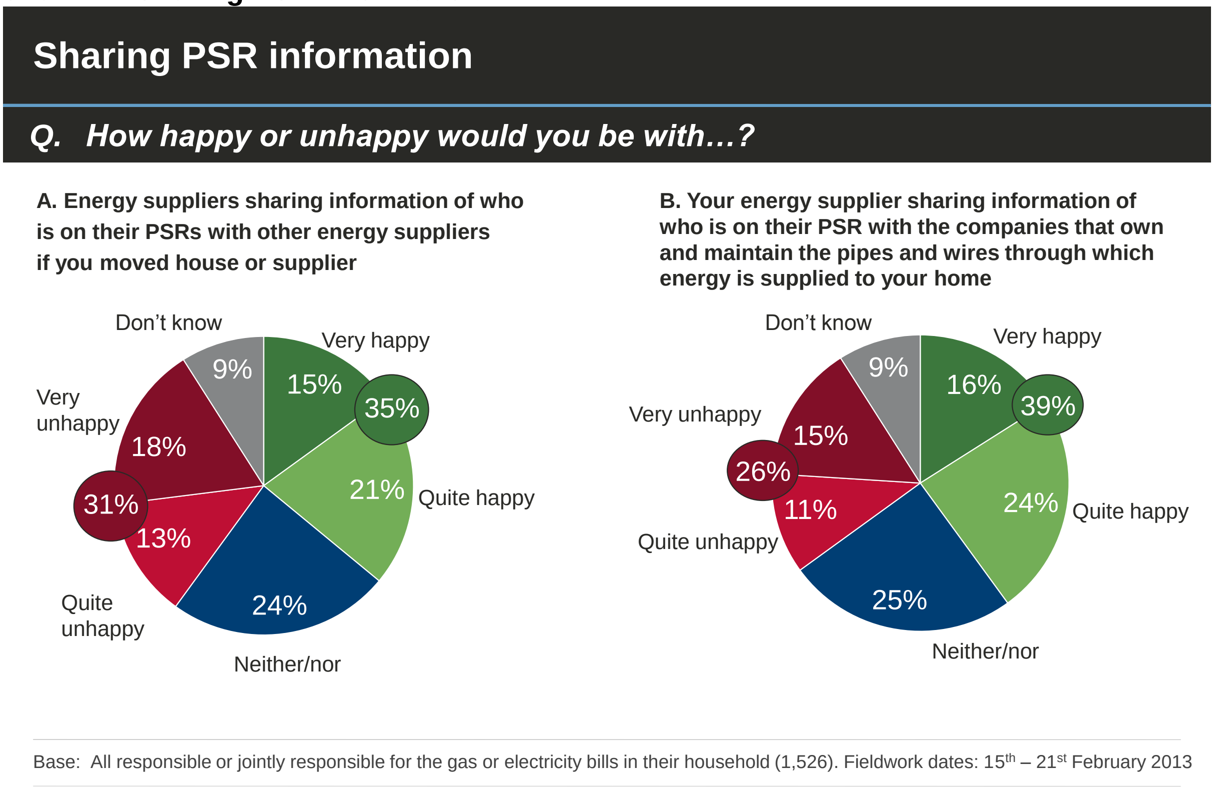
If energy companies were to share with each other information about who is on their PSRs, customers potentially would not need to ask to be added to a new supplier's Register if they switch supplier. However this would mean that information is passed between companies without you necessarily knowing it is happening."

Opinion among energy customers was generally split on sharing information with other energy suppliers. Around a third (35%) say they would be happy with energy suppliers sharing PSR information with other energy suppliers, almost the same proportion (31%) however say that they would be unhappy with this proposal, while a third say they are neither happy nor unhappy or don't know (33%).

There is slightly more support among customers for the proposal to share information with distribution companies. Two in five (39%) say that they would be happy with this, while about a quarter (26%) say they would be unhappy. Again, a third (34%) say they would be neither happy nor unhappy or don't know (see chart 12).

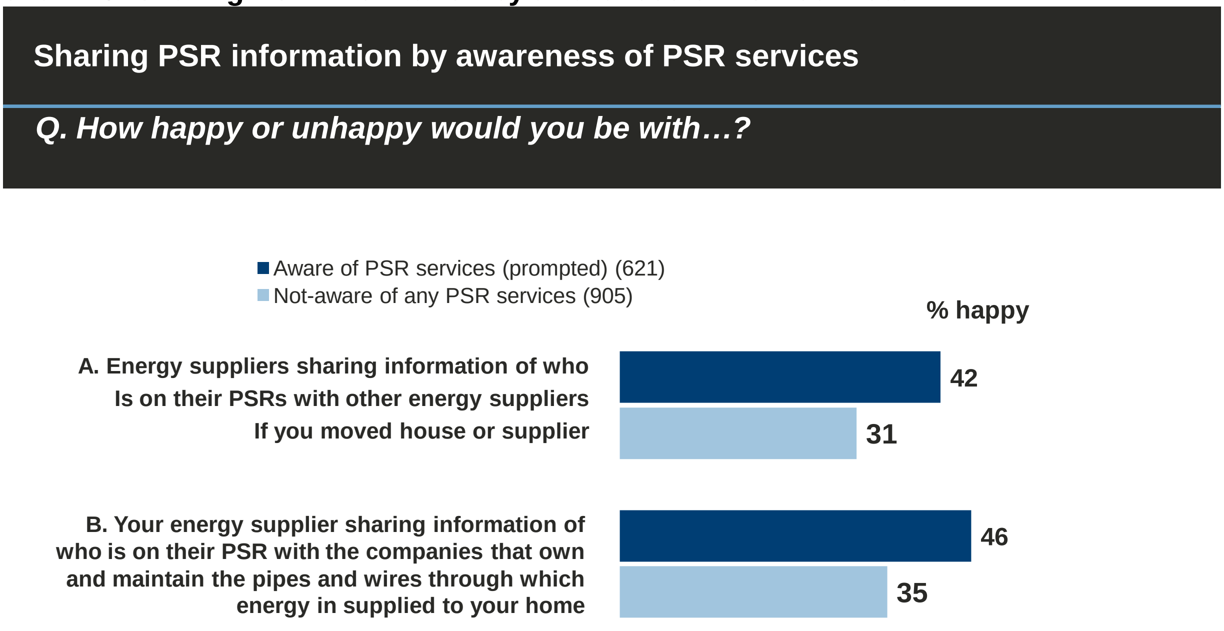
[29] This was the description used to explain the role of energy distribution companies

Chart 12: Sharing PSR information



Being familiar with PSR services before the interview increases willingness for information to be shared. Those who claim to be aware of PSR services are significantly more likely to say that they are happy for PSR data to be shared. Four in ten (42%) of those saying they are aware of PSR services (when prompted) are happy for data to be shared with other energy suppliers compared with three in ten (31%) of those not aware of any PSR services. Meanwhile, nearly half of those aware of PSR services (46%) are happy with data to be shared with distribution companies compared with about a third (35%) of those saying they are not aware of any PSR services (see chart 13).

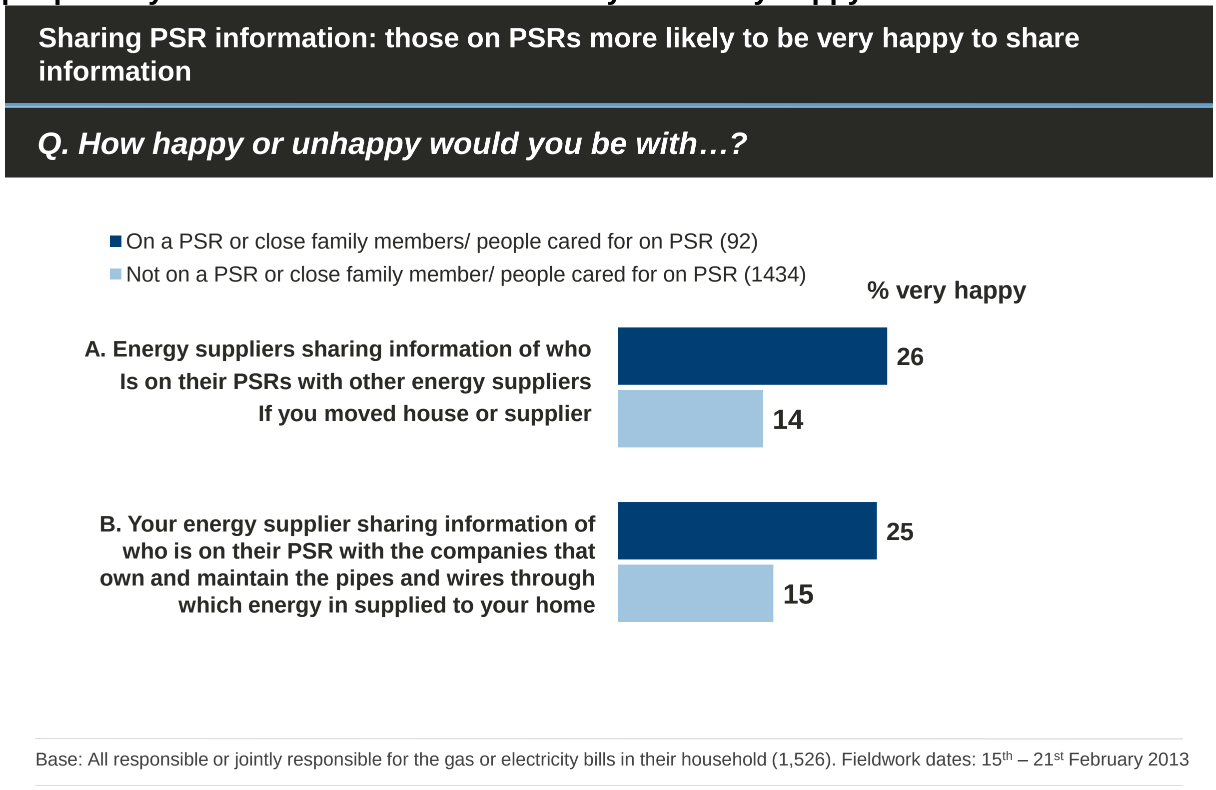
Chart 13: Sharing PSR information by awareness of PSR services



Base: All responsible or jointly responsible for the gas or electricity bills in their household (1.526). Fieldwork dates: 15th – 21st February 2013

Similarly those in the sample who state they are personally on a PSR, or who are close to someone who is, are significantly more likely to say they are *very happy* for information to be shared (though they are not significantly more likely to be happy when 'very happy' and 'fairly happy' are combined). As shown in chart 14, about a quarter of those on a PSR, or close to someone who is, say they are very happy for information to be shared with other energy suppliers (26%) and distribution companies (25%) respectively, compared with one in seven of those not on a PSR (14% and 15%, respectively).

Chart 14: Sharing PSR information – those on PSRs or know of close family members/ people they care for on PSRs are more likely to be very happy to share information



This suggests that those who are most likely to use PSR services are most likely to see the benefits of PSR information being shared, perhaps because it would help to reduce the burden on them personally. Overall, 43% of those on a PSR or with close friends or family on a PSR are happy with information being shared with other suppliers and 45% are happy with information being shared with distribution companies.

Willingness to share information does not seem to be influenced by vulnerability, at least in a general sense. Those identified as having characteristics which make them at risk of being vulnerable are not more or less likely to be happy for suppliers to share information either with other suppliers or with distribution companies. The breakdown of responses of vulnerable and non-vulnerable energy customers is in line with the overall results.

Customers surveyed in social grades AB are more likely to say that they are happy with information to be shared. Over two in five (44%) in these social grades say they are happy for PSR information to be shared with other energy suppliers compared with 35% overall, while around half (47%) say they are happy for this information to be shared with distribution companies, compared with 39% overall.

8. Important non-financial services for vulnerable customers

It was explained in the survey that different kinds of services will be more or less important depending on an individual customer's needs. Respondents were then asked their views about which current PSR/GSC services are most important for energy companies to provide for customers who might be considered vulnerable.

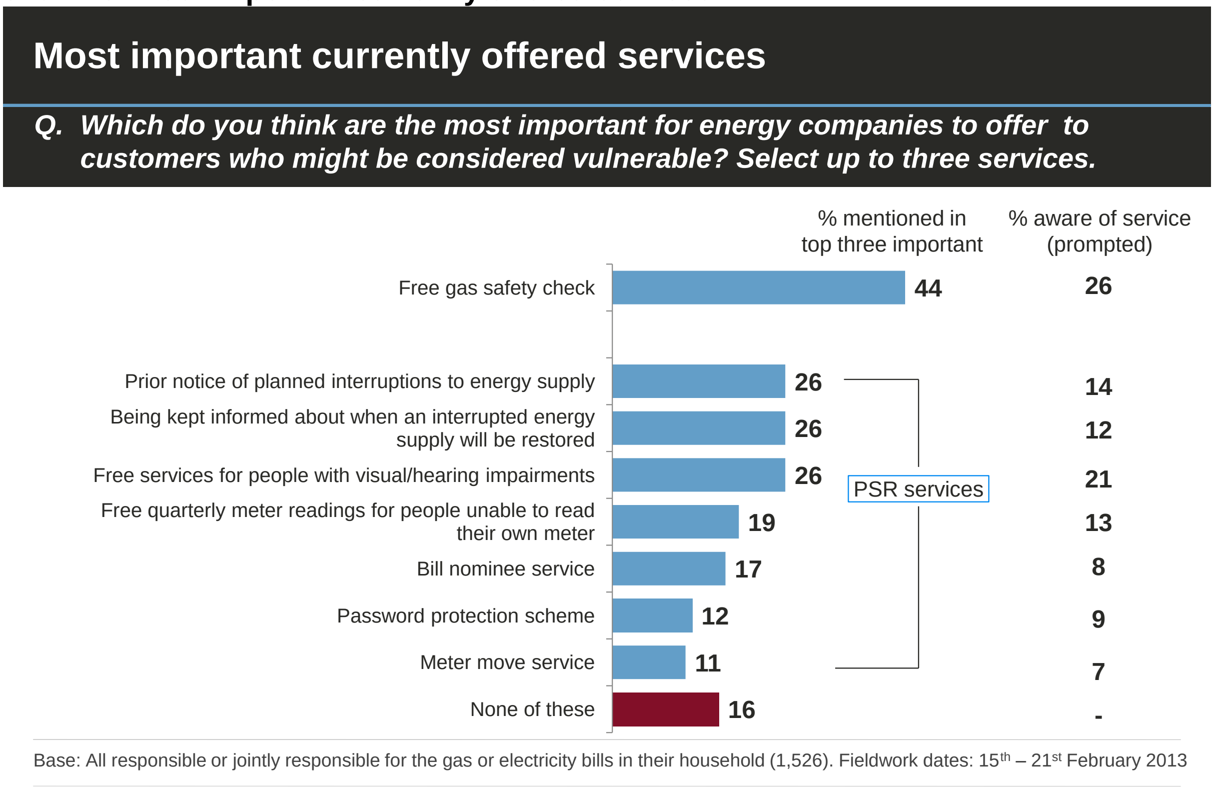
Additionally, the qualitative research which ran in parallel to this survey was designed to identify potential new services which could be introduced in the future. Three ideas were developed enough to include within the survey and respondents were also asked to choose which of these they thought would be most important for energy companies to provide to customers who might be considered vulnerable.

Important current services

When asked to select from a list the most important non-financial services that energy companies should provide to vulnerable customers, just under half (44%) of GB energy customers surveyed placed the free gas safety check among the most important services. Around a quarter cited 'prior notice of planned interruption to energy supply', 'being kept informed about when an interrupted energy supply will be restored', and 'free services for people with visual/ hearing impairments' among the most important services (all 26%).

Generally the higher the awareness of a service, the more likely energy customers are to consider the service important. The following chart shows the results from customers selecting up to three services as among the most important (see chart 15).

Chart 15: Most important currently offered services



One in six (16%) energy customers in the sample say that none of the services listed are among the most important services that energy companies should offer to vulnerable people. Those not currently eligible for PSR services are more likely to say that none of the services are among the most important (18% compared with 13% of those eligible for PSR), while those who are defined as vulnerable though not eligible for PSR are also more likely to say ‘none of these’ (21%). Those with no formal qualifications, lower household incomes and living in rented were also more likely to answer ‘none of these’ (36%, 31% and 35% respectively). In contrast, those who are aware of PSR services (when prompted) are significantly more likely to select at least one of the PSR services as being important (88% compared with 58% of those not aware of PSR services)[30].

Those surveyed aged 65 or over are more likely to say they consider ‘being kept informed about when an interrupted energy supply will be restored’ as one of the most important services (32%).

The bill nominee service had differing levels of support by subgroup. In particular, the research suggests that people in social grades AB (25%) are more likely to consider the bill nominee service important (compared with 17% overall) while those eligible for PSR are less likely to consider the bill nominee service as among the most important services.

Potential new services

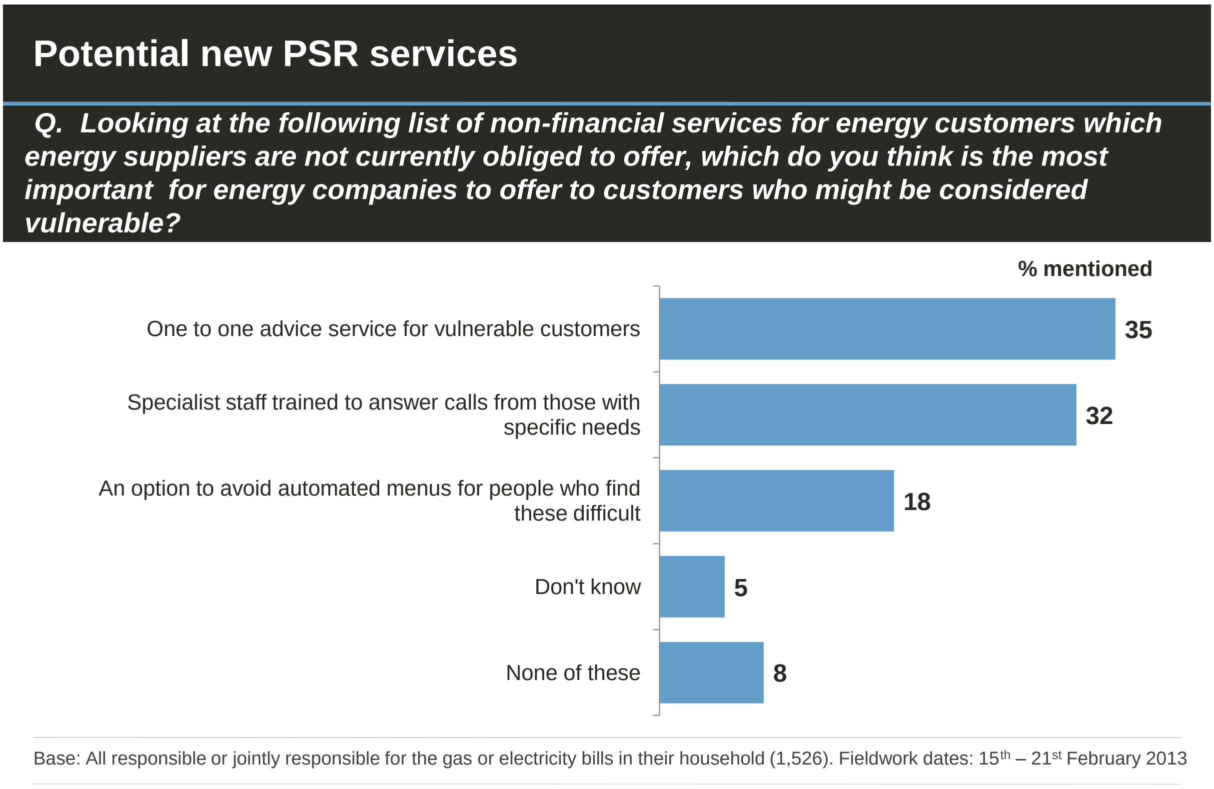
As outlined above, respondents were also shown three non-financial services which energy suppliers are not currently obliged to offer, but which had been suggested in the qualitative

[30] Although the information was not formally captured, some commented to the interviewer that this was because they felt that no non-financial services are a priority when people needed financial help.

research as potential services to be offered in the future. They were asked which they think is the most important to offer to customers who might be considered vulnerable.

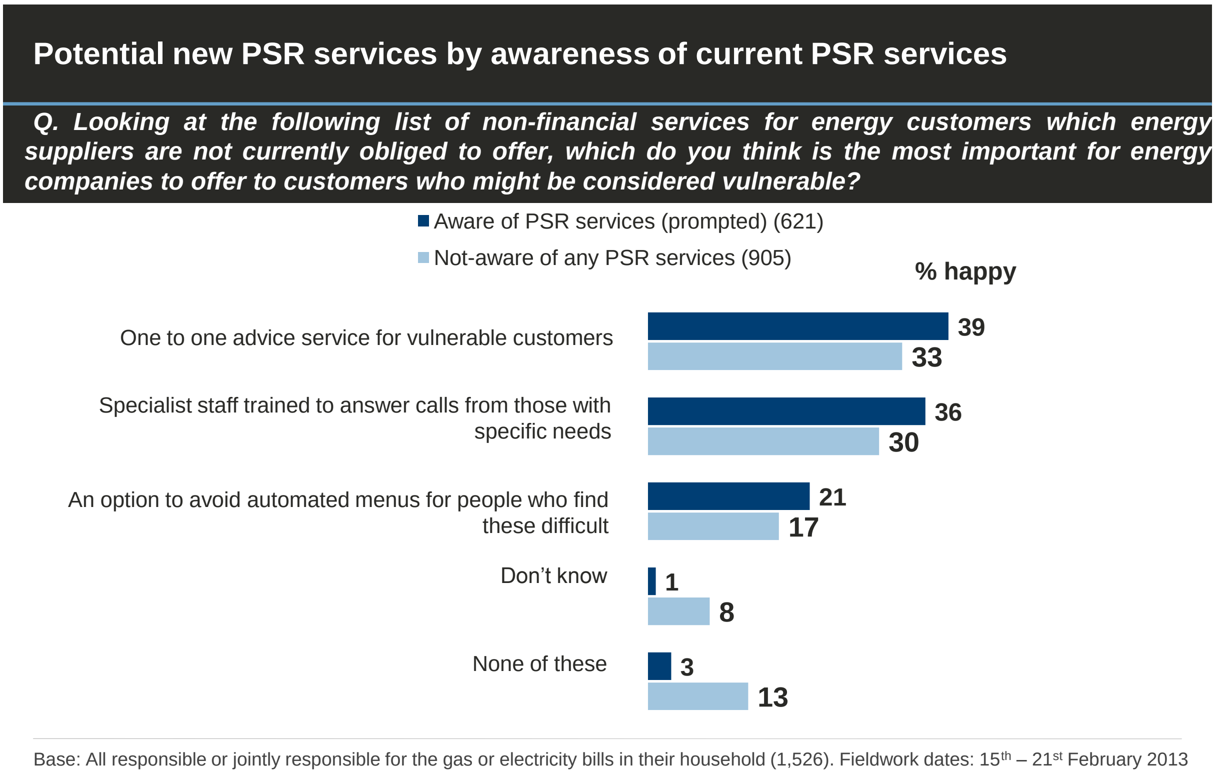
Of the three services, there was more support for 'one to one advice service for vulnerable customers' (selected by 35%), and 'specialist staff trained to answer calls from those with specific needs' (selected by 32%). There was less support for 'an option to avoid automated menus for people who find these difficult' (18%), as shown in chart 16.

Chart 16: Potential new PSR services



Once again, those aware of PSR services are more likely to regard any of the services as important. Chart 17 shows that those aware of at least one PSR service when prompted are more likely to consider all of the potential new services as important. In contrast, there was no significant difference between the views of those currently on a PSR/who knew someone on a PSR and those who were not, or those who were eligible or ineligible under any of the different criteria (PSR, GSC or wider indicators of potential vulnerability). However, those who said they had used a PSR service in the past year were more likely to support the idea of one to one advice service, whereas those who had not preferred the idea of specialist staff for those with specific needs.

Chart 17: Potential new PSR services by awareness of current PSR services



Those in social grades C2DE are twice as likely to say 'none of these' compared with those in social grades ABC1 (12% compared with 6%)

9. Conclusions

This research suggests that around half of GB energy customers have characteristics which make them more likely to be at risk of being vulnerable, while a third of GB consumers are classified as being eligible for PSR. It also indicates that those in social grades DE are significantly more likely to be defined as vulnerable, however they are also less likely to say that they have heard of non-financial support provided by energy companies for customers who might be considered vulnerable. This lower awareness of the support available among those in social grades most likely to be at risk of being vulnerable is a trend found throughout the findings of this study, as those in social grades C2DE are also significantly less likely to be aware of PSR services when prompted.

Spontaneous awareness of PSR services is low. One in ten GB energy customers surveyed are aware of non-financial support provided by energy companies and spontaneously mention at least one PSR service. A similar proportion of customers say that they are currently on a PSR or know of a family member/ people they care for on PSRs (5% of energy customers), and the proportion who believe they have used at least one PSR service over the last year (10% of energy customers). However the proportion believing they receive PSR services is likely to be inflated as discussed in this report, in part because people might be confusing *Priority* services (e.g. quarterly meter reads) and other services (e.g. meter reads).

Free gas safety checks are most commonly mentioned as one of the most important services energy companies provide for vulnerable customers. Additionally, around a quarter of energy customers consider prior notice of planned interruptions to supply; being kept informed about when interrupted supply will be restored; and free services for people with visual/hearing impairments as among the most important services. People eligible for PSRs are more likely to consider being kept informed about when an interrupted supply will be restored as among the most important services. By contrast, the password protection scheme and meter move service are seen to be less important, with only around one in ten considering them among the most important services.

While GB energy customers surveyed in general are somewhat divided in their views towards PSR information being shared to other energy suppliers and distribution companies, those aware of PSR services are more supportive of information sharing.

Implications

The number of people refusing to say which services are most important to provide is important. This could potentially be because they feel they are all important and therefore refuse to choose, or secondly because they feel that in the current financial situation non-financial services are less important. There is insufficient data to confirm which is the case, but the qualitative Panel research[31] suggested people found it difficult to choose, especially where they assumed the services should be low cost to deliver and therefore they believed all could be provided. As noted earlier in the report, some concern was expressed during the survey about placing undue emphasis on non-financial help, when in fact they felt financial support was much more important in the current economic climate.

[31] Ofgem Consumer First Panel – Research to inform Ofgem's review of the Priority Services Register, by Ipsos MORI. June 2013.

The survey does provide some evidence that usage of PSR services amongst those who are aware and eligible is relatively high (25%). However, relatively few of those eligible (or of energy customers in general) are aware of the PSR despite the current requirement for energy companies to make customers aware on an annual basis.

If a wider number of risk factors which could potentially lead to vulnerability are considered then a considerable number of people will be eligible for PSR services. This then raises the question of whether or not it will be worthwhile to have eligibility criteria, or whether all people should be eligible if they need a service, as suggested by the Panel[32] (i.e. adopting a tailored approach). It is also worth noting that a number of people who did not appear to be eligible based on the information they provided still felt they have used PSR services in the past year. This could either indicate that people were mistaken (particularly likely in the case of gas safety checks) or that suppliers are relatively relaxed when applying the eligibility criteria.

While the idea is relatively popular amongst those using the PSR, overall the reception for allowing or requiring information sharing is mixed. The Panel findings suggested that it is the lack of control over data if processes are automatic which makes people uncomfortable, and that consequently an opt-in or opt-out could perhaps be the way to make a greater number of people comfortable with the proposal.

[32] Ofgem Consumer First Panel – Research to inform Ofgem's review of the Priority Services Register, by Ipsos MORI. June 2013.

Appendices

Appendices

Questionnaire and topline results

Ofgem Priority Service Register quantitative survey
Topline Results

- The questions were placed on a nationally representative face to face omnibus survey, asked to a nationally representative sample of 1,990 adults aged 15+ resident in Great Britain. Fieldwork was conducted in the period 15-21 February 2013
- Energy consumers were identified via an initial screener question (OF01a) and the remainder of the questions were asked only to energy customers. Consequently the questionnaire was asked to 1,526 respondents (1,525 weighted) who said they are responsible or jointly responsible for the gas or electricity bills in their household
- Data are weighted by sex, age, social class, region and working status
- Where results do not sum to 100, this may be due to multiple responses, computer rounding or the exclusion of don't knows/not stated
- As asterisk (*) represents a value of less than one half of one percent, but not zero

OF01a. **Are you responsible or jointly responsible for the gas or electricity bills in your household?**

	%
Yes	77
No	23

Base: 1,990 British adults aged 15 or over

OF01b **Can you tell me whether any of the following statements apply to you? I would like to remind you that the information collected here is confidential and will be used anonymously.**

	Yes %
I have a disability	8
I have a long-term illness	10
I am of pensionable age (i.e. eligible to claim the state pension)	23
There are children under 5 living in my household	11
My household receives means tested benefits	5
I sometimes struggle with reading or sums	1
At home, we usually do not speak English	2
None of these	54
Don't know	*
Refused	*

Base: All responsible or jointly responsible for the gas or electricity bills in their household (1,526)

Thinking now about energy companies:

OF02. **Are you aware of any non-financial support provided by energy companies for customers who might be considered vulnerable? By non-financial support we mean support or special services other than help for paying or reducing your energy bill or changing your tariff.**

	%
Yes	24
No	76
Don't know	*

Base: All responsible or jointly responsible for the gas or electricity bills in their household (1,526)

OF03. **Can you please tell me what non-financial support you are aware of?**

	%
A. Bill nominee service (bills sent to a nominated person, such as a friend or family member upon request)	11
B. Free quarterly meter readings for people unable to read their own meter	16
C. Meter move service (a free service to move the meter to more convenient location in the home, for people who are unable to access their meter in its current location easily)	8
D. Prior notice of planned interruptions to energy supply, e.g. being warned about a power cut in advance	15
E. Being kept informed about when an interrupted energy supply will be restored, e.g. being told when power will come back on during a power cut	8
F. Password protection scheme - adding a password to your energy account free of charge which will be used by any energy company representative visiting your home	6
G. Services for visual/ hearing impairment/ billing in Braille/ large print and accessible ways to make a complaint	19
H. gas safety check / carbon monoxide check / free gas safety check	27
I. Mention of financial help (warm home discount or social tariff / winter fuel allowance / help with bills / cheapest tariff advice)	33
J Mention of energy saving help (insulation, light bulbs etc)	36
Other	3
None of these	21
Don’t know	4

Base: All who say they are aware of any non-financial support provided by energy companies for customers who might be considered vulnerable (366)

OF04**. And can you please tell me which, if any, of the following services you are aware of energy companies providing for customers who might be considered vulnerable?**

	%
A. Bill nominee service - bills sent to a nominated person, such as a friend or family member upon request	8
B. Free quarterly meter readings for people unable to read their own meter	13
C. Meter move service – a free service to move the meter to more convenient location in the home, for people who are unable to access their meter in its current location easily	7
D. Prior notice of planned interruptions to energy supply, e.g. being warned about a power cut in advance	14
E. Being kept informed about when an interrupted energy supply will be restored, e.g. being told when power will come back on during a power cut	12
F. Password protection scheme - adding a password to your energy account free of charge which will be used by any energy company representative visiting your home	9
G. Free services for people with visual/ hearing impairments, such as billing in Braille or large print and accessible ways to make a complaint	21
H. Free gas safety check	26
None of these	44
Don’t know	6

Base: All responsible or jointly responsible for the gas or electricity bills in their household (1,526)

OF05. **And of those services, which, if any, have personally you used over the past twelve months?**

	%
A. Bill nominee service - bills sent to a nominated person, such as a friend or family member upon request	1
B. Free quarterly meter readings for people unable to read their own meter	6
C. Meter move service – a free service to move the meter to more convenient location in the home, for people who are unable to access their meter in its current location easily	1
D. Prior notice of planned interruptions to energy supply, e.g. being warned about a power cut in advance	4
E. Being kept informed about when an interrupted energy supply will be restored, e.g. being told when power will come back on during a power cut	5
F. Password protection scheme - adding a password to your energy account free of charge which will be used by any energy company representative visiting your home	3
G. Free services for people with visual/ hearing impairments, such as billing in Braille or large print and accessible ways to make a complaint	2
H. Free gas safety check	13
None of these	71
Don’t know	-

Base: All aware of one or more PSR service (769)

OF06. **Different kinds of services will be more or less important depending on an individual customer's needs, but looking at the following list of non-financial services for energy customers, which do you think are the most important for energy companies to offer to customers who might be considered vulnerable? Please select up to three services.**

	%
A. Bill nominee service - bills sent to a nominated person, such as a friend or family member upon request	17
B. Free quarterly meter readings for people unable to read their own meter	19
C. Meter move service – a free service to move the meter to more convenient location in the home, for people who are unable to access their meter in its current location easily	11
D. Prior notice of planned interruptions to energy supply, e.g. being warned about a power cut in advance	26
E. Being kept informed about when an interrupted energy supply will be restored, e.g. being told when power will come back on during a power cut	26
F. Password protection scheme - adding a password to your energy account free of charge which will be used by any energy company representative visiting your home	12
G. Free services for people with visual/ hearing impairments, such as billing in Braille or large print and accessible ways to make a complaint	26
H. Free gas safety check	44
Other (please specify) – Price / high cost mentions[33]	*
Other	*
None of these	16
Don't know	6

Base: All responsible or jointly responsible for the gas or electricity in their household (1,526)

[33] This option was not offered to respondents but where they said 'other' and were asked to specify there were 5 mentions of price / high cost

QF06b: **And now looking at the following list of non-financial services for energy customers which energy suppliers are not currently obliged to offer, which do you think is the most important for energy companies to offer to customers who might be considered vulnerable? Please select one service.**

	%
A. One to one advice service for vulnerable customers	35
B. Specialist staff trained to answer calls from those with specific needs	32
C. Option to avoid automated menus for people who find these difficult	18
Other	*
None of these	8
Don't know	5

Base: All responsible or jointly responsible for the gas or electricity in their household (1,526)

OF8a. **Energy companies have an obligation to maintain a Priority Services Register. The Priority Service Register is a list of consumers who are eligible for non-financial support from their supplier like the examples we've been discussing. People are added to the list where they have asked to be included on it, or where someone that the customer knows has asked on their behalf. Eligible customers include people of pensionable age, people who have a disability or have who have a chronic sickness. Each energy company has its own list of consumers. Some suppliers use different names for their PSRs, the different names are displayed on this screen.**

Priority Services Registers: (E.On; EDF; British Gas),
Carefree (Scottish Power),
Careline (SSE),
Warm Response (N Power)

As far as you are aware, are you on a Priority Services Register?

	%
Yes	5
No	95
Don't know	1

Base: All responsible or jointly responsible for the gas or electricity bills in their household (1,526)

OF08b.**And as far as you aware, are any of your close family members, or people you care for on a Priority Services Register?**

	%
Yes	2
No	97
Don't know	1

Base: All responsible or jointly responsible for the gas or electricity bills in their household (1,526)

OF9a. **Can you tell me how you found out about the Priority Services Register?**

	%
Saw it on my bill/annual statement	7
Saw it in an energy company leaflet/flier/advert	9
Was told about it by my energy supplier (the company I buy gas or electricity from)	11
Was told about it by the company responsible for gas pipes / electricity wires locally (distribution network operator / gas distribution network)	2
Saw it advertised by a charity or other organisation (not an energy company)	3
Was told about it by a charity or other organisation (not an energy company)	4
Was told about it by a friend/family member	15
Saw it/heard it on radio/TV	8
Other (please specify) – was told about it at work[34]	4
Other	10
Don't know/ can't remember	27

Base: All personally on a PSR (77)

OF9b. If you're able to say,can you tell me how your close family member, or the person you care for found out about the Priority Services Register?

	%
Saw it on my bill/annual statement	5
Saw it in an energy company leaflet/flier/advert	5
Was told about it by my energy supplier (the company I buy gas or electricity from)	13
Was told about it by the company responsible for gas pipes / electricity wires locally (distribution network operator / gas distribution network)	-
Saw it advertised by a charity or other organisation (not an energy company)	-
Was told about it by a charity or other organisation (not an energy company)	8
Was told about it by a friend/family member	35
Saw it/heard it on radio/TV	3
Other	-
Don't know/ can't remember	30

Base: All with close family members/people they care for on a PSR (35)

[34] This option was not offered to respondents but where they said 'other' and were asked to specify there were 3 mentions of 'was told about it at work'.

OF10. **Earlier you mentioned you have used the following services in the past 12 months** [INSERT SERVICE FROM OF5]. **This is/these are a Priority Services Register service. If you can remember, can you tell me how you found out about the service you received?**

	%
Saw it on my bill/annual statement	12
Saw it in an energy company leaflet/flier/advert	13
Was told about it by my energy company	26
Saw it advertised by a charity or other organisation (not an energy company)	2
Was told about it by a charity or other organisation (not an energy company)	2
Was told about it by a friend/family member	6
Council wrote to me	1
Other	3
Don't know/ can't remember	38

Base: All saying they have used a PSR services over past 12 months but say they are not on a PSR (136)

OF11. **Currently, eligible customers are added to a supplier's Priority Services Register (PSR) if they ask to be added to it, or someone they know asks on their behalf. At the moment, if a customer on a company's PSR switches supplier or moves house, they need to ask again to be added to their new supplier's PSR, as the energy companies do not share this information.**

If energy companies were to share with each other information about who is on their PSRs, customers potentially would not need to ask to be added to a new supplier's Register if they switch supplier. However this would mean that information is passed between companies without you necessarily knowing it is happening.

On a scale of 1 to 5, where 1 means very unhappy and 5 means very happy, how happy or unhappy would you be with:

	Very happy	Quite happy	Neither/ nor	Quite unhappy	Very unhappy	DK/ Ref.
	%	%	%	%	%	%
a) Energy suppliers sharing information of who is on their PSRs with other energy suppliers if you moved house or supplier?	15	21	24	13	18	9
b) Your energy supplier sharing information of who is on their PSR with the companies that own and maintain the pipes and wires through which energy is supplied to your home? For example, so they could directly tell you of any planned power cuts or interruptions to your energy supply.	16	24	25	11	15	9

Base: All responsible or jointly responsible for the gas or electricity bills in their household (1,526)

OF12. **Do you have mains gas and /or mains electricity in your home?**

	%
Yes – mains electricity	95
Yes – mains gas	82
No – neither	2
Don't know/refused	*

Base: All responsible or jointly responsible for the gas or electricity bills in their household (1,526)

OF13a. **Who is your current electricity supplier?**

	%
British Gas	28
Co-operative Energy	1
E.ON	15
Ebico	*
Ecotricity	1
EDF	12
First Utility	1
Good Energy	-
Marks & Spencer Energy	1
npower	9
Ovo	*
Sainsburys Energy	1
Scottish Hydro	1
Scottish Power	11
Southern Energy	8
Spark Energy	-
SSE	3
Swalec	2
Atlantic Energy	*
Scottish Gas	*
Southern Electric	*
Utility warehouse	1
Utilita	*
Other	*
Don’t know	3

Base: All with mains electricity (1,446)

b) **Who is your current gas supplier?**

	%
British Gas	36
Co-operative Energy	1
E.ON	12
Ebico	*
Ecotricity	*
EDF	10
First Utility	1
Good Energy	-
Marks & Spencer Energy	1
npower	9
Ovo	*
Sainsburys Energy	1
Scottish Hydro	1
Scottish Power	11
Southern Energy	7
Spark Energy	-
SSE	3
Swalec	2
Atlantic Energy	*
Scottish Gas	*
Southern Electric	*
Utility warehouse	1
Utilita	*
Other	*
Don’t know	3

Base: All with mains gas (1,258)

OF14. **Approximately how much do you spend on home energy, that is electricity and mains gas (if you have it)?**

	%
1 - £700 per year	17
£701 - £1,200 per year	38
£1,201 - £1,500 per year	9
£1,501+	23
Don’t know	13

Sample Profile

Below is the sample profile of the 1,526 British energy consumers who took part in this research.

	Weighted data %
Sex	
Female	51
Male	49
Age	
15-34	22
35-64	53
65+	24
Social Group	
AB	27
C1	27
C2	22
DE	24
Country	
England	85
Wales	6
Scotland	9
Working status	
Full time	46
Part time	10
Not working	44
Education	
GCSE/O-level/CSE/NVQ12	28
A-level or equivalent	17
Degree/Master degree/PHD	30
No formal qualifications	18
Household Tenure	
Rented	32
Non-rented	68

Base: All responsible or jointly responsible for the gas or electricity bills in their household (1,526)