Department for Energy Security & Net Zero

Interim Evaluation of Domestic Energy Affordability Support Schemes in Northern Ireland

Annex A: Technical Report

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Contents

List of Figures

List of Tables

Annex A1 Evaluation methodology

1.1 Evaluation context

The Northern Ireland (NI) domestic energy affordability scheme interim evaluation was a mixed methods process, outcome and early impact evaluation of the Energy Bills Support Scheme Alternative Fuel Payment (EBSS AFP), the EBSS Alternative Funding (EBSS AF) and the Energy Price Guarantee (EPG) schemes. This formed part of a package of evaluations of the UK energy affordability schemes. An interim evaluation of the energy affordability schemes in Great Britain (GB) was also commissioned by DESNZ and conducted in a similar timeframe to that for NI. A final impact and economic evaluation of the UK energy affordability schemes is currently being undertaken, which will report separately.

1.2 Overarching evaluation approach

Overall, as an interim (process, outcome and early impact) evaluation, this evaluation uses a theory-based evaluation (TBE) approach to examine how the energy affordability schemes have been delivered (process) and how they contributed towards their intended outputs and outcomes. The main theory-based approach used to examine the outcomes of the energy affordability schemes was contribution analysis. This evaluation also draws upon a range of modelling and secondary data analysis to support the understanding of the process and outcomes of the schemes. A separate economic and impact evaluation of the schemes was commissioned in 2024 to provide final evidence on attribution of impact and overall value for money.

The evaluation comprised the following data collection and analysis strands:

Large-scale surveys of households

This is described further in Annex A2 below.

Qualitative depth interviews with households, key stakeholders and advocacy organisations (or experts in vulnerable household groups)

This is described further in Annex A3 below.

Price elasticity modelling

To provide an estimate of how the energy affordability schemes affected energy consumption during the intervention period, the evaluation team also used Almost Ideal Demand System (AIDS/QUAIDS) models of demand to calculate price elasticities of demand (the change of consumer demand for a product or service following a change of its price). To model the preferences of consumers, the analysis used a structural model. The functions in these models take prices and income as the inputs, and output price elasticities and expenditure, generally

as a budget share. Price elasticities of demand are modelled as the percentage changes in energy consumption relative to the percentage changes in prices, for each household group included in the model. These models enable comparisons of the output function at varying price and income levels, such as with/without the EBSS AFP and EPG (see Annex C for details).

EBSS AF population estimation

At the design stage of the EBSS AF scheme, estimates were made by the then Department for Business Energy and Industrial Strategy (BEIS) of how many households were potentially eligible for this support. This was undertaken at pace and with the data available at the time, which was limited for some population groups. As part of this evaluation, London Economics conducted additional work to assess methods of estimating the size of the alternative funding (AF) populations in NI to understand how these estimates could be improved in the future with existing data and data that has since become available, particularly the publication of the 2021 census.

The research involved identification of data sources that could be used to estimate the size of the EBSS AF populations; exploration of the benefits and limitations of these datasets, including those used in the original estimates and any new ones; and the identification of methodologies that could be applied to these datasets to estimate the populations.

This analysis is described in more detail in Annex C.

Analysis of monitoring data and management information

To understand how energy affordability interventions were implemented and to compare this to DESNZ's initial expectations, the evaluation team analysed a range of sources. This included DESNZ monitoring data on household reach, payment delivery, voucher redemption, and application numbers for EBSS AF. After the final reconciliation data was published for EBSS AF by DESNZ the figures in the report were updated. The team also reviewed final scheme reconciliation reports. Importantly, information from the schemes' external auditors was not available at the time this report was produced.

Desk based research and other secondary data

The evaluation drew upon several sources of secondary data providing insights into early outcomes (e.g. energy prices) and delivery effectiveness (e.g. monitoring and management information) and incorporated findings provided in a secondary data report. Secondary data was reviewed and triangulated to complement primary research findings. Data sources for this report includes the NI Statistics Research Agency (NISRA) census of NI households and the NI House Condition Survey conducted by the NI Housing Executive. This report assessed household energy and non-energy consumption patterns, household composition data (e.g., household size, house type, tenure, age, location, and size), energy usage, and other factors influencing energy consumption. Second, the report examines typical household and individual finances, including income distribution, estimated energy costs, and insights from secondary surveys regarding concerns about bills, debt, or arrears. Finally, the report investigates fuel

poverty and distributional impacts. This analysis explores the estimated incidence of fuel poverty based on location, tenure, and household type, considering the distribution of impacts. These contextual findings are taken into account in the contribution analysis in Chapter 6. All secondary data sources are listed in Annex A4.

1.3 Evaluation Framework

1.3.1 Evaluation aims

Process evaluation aims

The overarching aims of the process evaluation were to:

- Explore how the interventions were implemented, including efficiency and effectiveness and consistency of implementation across recipient groups and by delivery mechanism;
- Explore the awareness, understanding, perceptions and experience of the interventions among different recipient groups; and,
- Explore the perceptions and experience of key stakeholders of the schemes.

Outcome evaluation aims

The overarching aims of the outcome evaluation were:

- Provide evidence on the schemes' outcomes given the NI energy context; and,
- Provide early insights into the impacts of the interventions as reported by households, and stakeholders and through modelled evidence and secondary data analysis.

Early outcomes are considered separately to impacts where there is more consideration of attribution and net outcomes. As part of the interim evaluation contract a plan for undertaking a UK-wide Impact and Economic Evaluation for the domestic energy affordability schemes was also developed. This plan informed the development of a DESNZ invitation to tender and a project which launched in summer 2024 and will report separately.

Underpinning these overarching aims were a comprehensive set of evaluation questions which can be found below.

1.3.2 Evaluation questions

Draft evaluation questions were designed by DESNZ as part of the invitation to tender process, and were later developed and refined through a series of discussions with DESNZ. The process evaluation questions are shown in Table 1 and the outcome evaluation questions are shown in Table 2.

Table 1 Process Evaluation questions

Theme	Question Number	Evaluation Question
Household Awareness and Understanding	PEQ1	What were the levels of awareness of the interventions? What information about the different interventions did households receive from government and from suppliers, and at what point?
	PEQ2	What were the levels of awareness of having received the interventions?
	PEQ3	What were levels of understanding of the support amongst intended recipients in terms of what support they were eligible for, when they would receive this support and how?
	PEQ4	How did awareness and understanding levels vary by different sub-groups of the bill-payer population (including based on which interventions they are eligible for, their supplier, payment type, location, and socio-economic characteristics)?
	PEQ5	To what extent did awareness and understanding change over time among different sub-groups?
Delivery and Reach	PEQ6	What was the reach of the interventions across the intended recipients?
	PEQ7	How has the reach of all interventions varied by different sub-groups of the bill-payer population?
	PEQ8	How have the later start dates and structure of the NI schemes (Nov 2022 for EPG; Jan 2023 for EBSS and AFP) impacted on the reach and efficacy of domestic affordability policies in NI?
	PEQ9	What was the take-up of the scheme among different sub-groups?
	PEQ10	What evidence, if any, was there of intermediaries such as landlords not passing energy price support through to end-beneficiaries?

	PEQ11	What were the processes involved with delivering the interventions (including closure of schemes that ended in 2023)? What processes worked well and less well for delivering the intended benefits? What barriers, challenges and issues were encountered by different stakeholders in delivering the schemes as intended?
	PEQ12	What was the scale of burden on energy suppliers to deliver the different interventions? What steps did DESNZ take to mitigate the burden on energy suppliers and to what degree were these effective? What costs have been incurred (by central and local government, URGENI, energy suppliers, other NI delivery partners, and bill payers)?
	PEQ13	What lessons were learnt from the delivery of support over winter 2022/23 and how were these applied to the delivery of subsequent support?
	PEQ14	What compliance and enforcement processes were carried out and to what extent did they encourage compliance? What was the nature, extent and scale of fraud and how did this compare between interventions? What was the nature and content of any scams related to the interventions that households were subject to, if any?
	PEQ15	Was the process of scheme administrators delivering compensation payments to suppliers effective and efficient? What was the burden on DESNZ in delivering payments to scheme administrators? To what degree were suppliers' forecasts accurate, mitigating the amount of underspend that needed to be reclaimed?
	PEQ16	What actions did energy suppliers take to provide households with information on the different interventions? What was the scale and nature of any additional support provided by suppliers?
	PEQ17	Was there any evidence of gaming and fraud among applicants? How were such cases detected?
Household Experience	PEQ18	How did the experience of receiving the schemes vary by different sub-groups of the bill-payer population (including based on which interventions they are eligible for, their supplier, payment type, location, and socio-economic characteristics)?

	PEQ19	To what extent did the experiences of different sub-groups change over time?
	PEQ20	How did the content and clarity of messaging around the schemes differ between suppliers? How did household experience differ between tariff and fuel types?
	PEQ21	How did applicants find the experience of applying for support? What was the scale of the burden on applicants and perceptions of the application process?

Contribution claims were then developed as part of the scoping stage and refined as part of the stage 2 evaluation plan process. The contribution claims are listed in Table 2, below, these answer the outcome evaluation questions as indicated in the last column of the table.

Table 2 contribution claims and outcome evaluation questions

Outcome Theme	Contribution	Description	Outcome Evaluation questions[1]
Household consumption	HC1	Schemes contribute to the ability of eligible households to maintain energy consumption at a safe and comfortable level, while limiting the use of other harmful mitigation strategies[2].	OEQ1: How have households adapted their energy consumption and wider spending behaviours because of the rise in energy costs? What impact, if any, have the schemes' contributions had on these behaviours? OEQ2: To what extent did households maintain consumption at a safe / comfortable level? How did maintaining safe consumption affect other essential spending? What impact, if any, have the interventions had on households' ability to maintain consumption at a safe / comfortable level?
Household consumption	HC2	Schemes contribute to the ability of low-income households, or those classified as fuel poor, to limit energy underconsumption.	OEQ3: What was the extent of underconsumption? How did this differ between key sub-groups, including between those classified as fuel poor and not fuel poor? What impact, if any, have the schemes had on limiting underconsumption?
Household consumption	HC3	The schemes help limit the scale and duration of PPM household self-disconnection from energy suppliers.	OEQ4: What was the scale of households disconnecting from their energy supply? What impact, if any, have the interventions had on the scale of households disconnecting from their energy supply?
Household finances	HF1	The schemes contribute to limiting the number of households that would not be able to pay their energy bills and who go into energy debt with their supplier.	OEQ5: How many and what proportion of accounts were in arrears throughout the scheme? How does this compare to previous trends? What is the total scale of energy debt and the average amount of debt?

[1] OEQ1,3, 9 were addressed across contribution claims. OEQ1 and OEQ3 regarding scheme perception were addressed in the process evaluation.
[2] Harmful mitigation strategies were defined under this evaluation as being: reducing spending on necessities (e.g. food, essential clothing, medicines), reducing other spending (e.g. holidays, meals out, days out), struggling to pay other housing costs or bills and taking on household debt/taking on more household debt (e.g. taking out loans, borrowing more, using more credit).

Household finances	HF2	The schemes contributed towards limiting the increase in the proportion of households experiencing fuel poverty.	OEQ6: During the interventions, what was the proportion of households whose income after housing costs fell below a threshold indicating potential fuel poverty? How does this compare to the equivalent period last year? How easy or difficult has it been for households to afford their energy bills in general and before the interventions?
Household finances	HF3	The schemes limited increases in household borrowing and cuts in other essential spending (e.g. food, essential clothing, medicines) and savings.	OEQ7: Household saving and borrowing: How did household saving and borrowing rates vary before and during intervention delivery? OEQ8: To what extent did households maintain consumption at a safe / comfortable level? How did maintaining safe consumption affect other essential spending? What impact, if any, have the interventions had on households' ability to maintain consumption at a safe / comfortable level?
Health and Welfare	HW1	Schemes limit increases in the instance of cold-related illnesses and mould in dwellings that can arise from under-heating	OEQ11: Bearing in mind contextual factors, how did the level of cold-related illnesses and instances of mould in dwellings over the intervention period vary compared to previous years?
Energy Supplier	ES1	Schemes limit the risks of energy supplier insolvencies through keeping customer debt levels low and delivering the schemes in a way that helps smooth cashflow fluctuations.	OEQ12: Did all suppliers stay solvent over the course of intervention delivery? Were any suppliers at risk of insolvency? OEQ13: What, if any, distortions to the market occurred over the course of intervention delivery?
		OEQ14, OEQ15 and OEQ16 were addressed across contribution claims	OEQ14: What were the perceptions of the stakeholders on the appropriateness and scale of the interventions (i.e. universality and value)? OEQ15: How did perceptions vary by different sub-groups of the bill-payer population and across the interventions?

		The schemes contribute to lowering households' level of concern about energy bills and household finances. OEQ9 and OEQ10 were addressed across contribution claims. This was part of the causal pathway for claims HC1, HC3 and HF3.	OEQ 9: How did the level of concern about energy bills vary before and during the interventions? OEQ10: How did the level of concern about household finances more broadly vary before and during the interventions?

1.4 Evaluation development and scoping

The evaluation plan was developed following a series of scoping activities, these were:

- Desk review: The evaluation team undertook a familiarisation exercise involving a review of policy documents, including the Business Case and Programme Delivery Plans. The aim was to gather understanding of the rationale for each of the energy affordability schemes, and the processes by which they expect to deliver intended outputs, outcomes, and impacts. This work informed the development of the ToCs (more information about the development of the ToCs and the contribution story is available in Annex B) along with the process maps for each of the interventions.
- Scoping interviews: to understand each energy affordability scheme, the evaluation team undertook interviews with 12 stakeholders involved in the design and delivery of the different energy affordability schemes. Interviews focused primarily on the following thematic areas:
    - Rationale for the energy affordability interventions;
    - Anticipated intervention-level outcomes and impacts, how they are expected to arise, and key risks and assumptions;
    - Key delivery processes and the criteria against which they should be measured; and
    - Available management information.
- Data review: A review of relevant data was completed in parallel to the above, to further inform the development of the evaluation framework and the overall approach. These covered:
    - Secondary data sources that could support the outcome and early-impact evaluation; and
    - Monitoring and management which was used to assess the efficiency and effectiveness of delivery processes.

Following learning from the scoping stage, an evaluation plan was developed in summer 2023, which detailed the approach and methods that were used during stage 1. A review of the evaluation design based on the stage 1 evaluation findings was then undertaken to set out a refined approach for stage 2. This built upon the initial evaluation plan, using all the learning from stage 1 to amend and improve the stage 2 evaluation plan.

1.5 Process evaluation approach

The process evaluation reviewed the efficiency and effectiveness of processes established to deliver the energy affordability scheme level objectives. The scoping phase made clear the importance of the process evaluation having a formative function, as although the schemes were not implemented after winter 2022/23, the need for shared learning and opportunities for

'course-correction', as well as providing DESNZ with useful learning for the delivery of future interventions, was recognised.

The processes used to deliver the schemes were identified through documentation review and stakeholder interviews and set out for each scheme in 'process maps'. These process maps complement and add value to the ToC as they describe the flow of work to deliver the schemes. They can be found in Annex B. The process maps illustrate the schemes' governance architecture, and the roles and responsibilities of various stakeholders involved in decision-making and delivery processes as well as dependencies between processes. Using qualitative interviews, survey evidence, and monitoring data, the process evaluation explored both subjective perceptions and objective details of the ways the energy affordability schemes were delivered. It examined the awareness, understanding, perceptions and experience of the interventions among different recipient groups and stakeholders against how it was expected they would function. The process evaluation assessed the following key factors related to the delivery of the schemes:

Table 3 Process evaluation key factors

Stage / process group	Types of delivery activities covered
Scheme design, set up and communications	Scoping work done by DESNZ before the interventions, drafting and finalising the business cases, launching guidance for energy suppliers, and communications to increase awareness
Contracting and revisions	Setting up the contracts with energy suppliers and the transfer of funds to energy suppliers
Delivery of payments	Facilitation of the payments from energy suppliers to beneficiaries
Compliance, assurance and audit of schemes	Checks and assurance processes to ensure energy suppliers deliver the interventions as expected
Final reconciliation and scheme closure	End of scheme reporting and comparison of actual vs. estimated costs for delivering interventions
Household perceptions towards and experience of schemes	Opinions and beliefs of households on the necessity of the interventions, and their experience of applying for them (where applicable) and receiving them
Stakeholder experiences of the schemes	Opinions and experiences of energy suppliers, scheme administrators, and advocacy group representatives on the necessity of the schemes and their delivery (where applicable)

1.6 Outcome evaluation approach

The outcome evaluation used a theory-based approach to examine how the energy affordability schemes contributed towards their intended outputs and outcomes. The unique context within which the schemes were launched, and the universal nature of the intervention informed the overall evaluation approach. The energy affordability schemes were launched at pace following a period of extreme disruption, resulting from COVID-19, structural changes in domestic energy consumption as remote working patterns settle, as well as the invasion of Ukraine, with widely publicised inflationary pressures exacerbating these structural changes. This meant that any interpretation of change observed over time required close attention to the broader context and the external drivers of change that might offer alternative explanation for any change observed. This was particularly difficult as all energy affordability schemes were implemented prior to the evaluation work taking place.

1.6.1 Other evaluation approaches considered

A range of different evaluation approaches were considered as the principal method during the scoping phase of this evaluation, the table below outlines each approach, the pros and cons of each method and why it was ultimately rejected as the chosen approach. Ultimately contribution analysis was chosen for its strengths in bringing together disparate sources and arriving at an overall judgement on plausibility of contribution to observed impacts, given the complexity of the energy affordability interventions and the fast-changing context within which they were delivered.

Table 4 Alternative evaluation approaches

Approach	Description	Pros	Why excluded
Realist evaluation	Used to understand what works, for whom, how, and under what circumstances, including what it is about the intervention that has generated the desired results in particular contexts. It depends upon the collection of data on how the programme has worked differently for different groups and under what contexts – it therefore relies upon data on cases or data stratified by groups.	Useful in instances where the causal links are unclear or several possible causal mechanisms may be in play, or where variation in results in different contexts is anticipated. It is useful when an intervention anticipates high variation between beneficiaries in how they receive and benefit from an intervention (and it is desirable to the evaluation commissioner to understand why).	The energy affordability schemes reached a very high number of individuals, it was not feasible to investigate scheme effects over a small number of known groups who could then be generalised to the population. At the scoping phase, there was also not sufficient detail at the household and delivery partner level of expected behaviours and how these interplay with the Theory of Change. This would have made it challenging to develop draft effective CMO statements for testing.
Process tracing	Used to (1) facilitate and provide methodological steps for mapping out detailed causal hypotheses; and (2) testing whether different pieces of evidence prove, support, refute or completely disprove the causal hypothesis.	This can be a useful method for gathering detailed and credible evidence for causal hypothesis when investigating a small number of causal mechanisms. Process tracing is also a useful method for case-based investigation of causal hypotheses. Process tracing tests are widely accepted as a robust framework for narrowing down the value and	There was a large number of causal mechanisms at play, and schemes were undertaken within a fast-changing context. At the study outset, no specific household groups of interest were identified by DESNZ. Rather, groups of particular interest were identified iteratively over the course of the study. This meant that a structured case-based approach using process tracing could not be developed at the outset. Finally, this approach provides greatest value where there is a variety of data types available

		quality of evidence as necessary and/or sufficient (or not) to support conclusions on strength of evidence for causality.	(through different modalities, e.g. observations, self-reported, authoritative, experimental); which was not the case for the energy affordability scheme outcome evaluation.
Qualitative Comparative Analysis (QCA)	A quali-quantitative approach to identifying the most common combination of factors associated with outcomes (including both policy levers and external factors)	Pragmatic method to identify groups of causal factors post hoc. Works based in cased-based studies with samples of between 15 to 50.	This method is suited to smaller sample sizes rather than for a large population level intervention, given the resource-intensive data collection necessary for each case. There are also some risks associated with not accounting for missing data. The Boolean formula underpinning QCA does not cope well with missing data. A separate QCA study and analysis has to be run separately for each individual outcome. There is a high resource intensity of running multiple QCA studies to assess all outcomes of interest given size of the energy affordability scheme interventions.

Bayesian updating	Extension of other methods like Process Tracing and Contribution Analysis by assessing probabilities of a policy/programme hypothesis being true given the existence of a piece of evidence. Bayesian updating can increase transparency of evaluators' prior beliefs in a causal hypothesis, and how collected evidence updates these beliefs.	Useful where causal claims are not directly observed or measured, making them difficult to test. Also, useful where evidence quality is variable. Stakeholders can be included in judging strength of evidence that supports contribution claim. Can be combined with contribution analysis to strengthen the method.	Numerical estimates of the probability of observing different strands of evidence could be subjective and open to misinterpretation. More intuitive forms of analysing and presenting results of contribution analysis exist. This is resource intensive, and scale of work can quickly escalate. This was considered a particular risk when considering the energy affordability scheme ToCs as there would have been multiple outcomes and causal pathways to test across the different schemes.
Most significant change	Participatory monitoring and evaluation method used in complex interventions. Involves the collection of significant change stories coming from stakeholders in the field.	Particularly useful when there is a need to understand different stakeholders' views on the aims of programme, how to implement it and success factors. Builds understanding and focus across teams and stakeholders.	As a participatory research method this would have required ongoing deliberative engagement with stakeholders, with cycles of review to iterate stories. This was deemed to be a time consuming and resource intensive method which would demand a high level of respondent engagement. This approach was also considered inappropriate given the scale of energy affordability schemes and the range of stakeholders that would have needed to be consulted.
Experimental Methods – Randomised Control Trial	Involves providing a robust comparison between one or more groups receiving an intervention (treatment group) and a group that	Ensures there are no observable or unobservable differences (or bias) between the treatment and control, meaning that any	This was considered not feasible as schemes had largely already been implemented at the outset of the evaluation, were near universal schemes and

	does not receive the same intervention (control group) through randomly assigning participants to each group.	differences in measured outcomes between the two groups can be reliably attributed to the intervention, not an unrelated factor.	random allocation was not practical (and introduces ethical concerns)
Quasi-experimental Methods e.g., Regression Discontinuity Design, Difference-in-Difference, Propensity Score Matching etc.	Similar in aims to RCT in terms of estimating net-impacts between treatment and control groups.	Can be used when not feasible to randomly allocate participants to different groups, but a comparison group of households not receiving intervention but otherwise similar can be identified or synthetically created.	No suitable comparison group was available given the universal nature of the schemes. Whilst not all schemes were launched at the same time (e.g. AFP schemes were launched c6 months after the main EPG support), this couldn't be exploited given the substantial differences in energy use characteristics between the two population groups. Wider empirical literature to understand the effects of energy retail prices on some outcomes of interest exploits variations in tariff types or heating fuel[3]. However, the UK energy markets lack sufficient variation in retail markets between fuel types and regions, and no longitudinal panel dataset of households including their tariff type was available for this work.

[3] See for instance relevant research in the US: Ahmed, Ahmed I., Robert S. McLeod, and Matej Gustin. "Forecasting underheating in dwellings to detect excess winter mortality risks using time series models." Applied Energy 286 (2021): 116517.

1.6.2 Conducting contribution analysis

To examine the outcomes of the energy affordability schemes, a contribution analysis (CA) was conducted. Contribution analysis aims at understanding the contribution a policy or programme has made to the observed outcomes and impacts. It belongs to the group of theory-based evaluations, which are based on testing evaluators assumptions or theory of how change is expected to happen following an intervention.[4] Contribution analysis can also be used to help explain how and why interventions are working and for whom[5].

Specifically, contribution analysis assesses evidence supporting the contribution of a programme to outcomes or impacts of interest. Contribution claims are listed within a contribution analysis framework and are reviewed against different sets of data and systematically categorised as to whether they support or refute the causal claim and the strength of evidence.

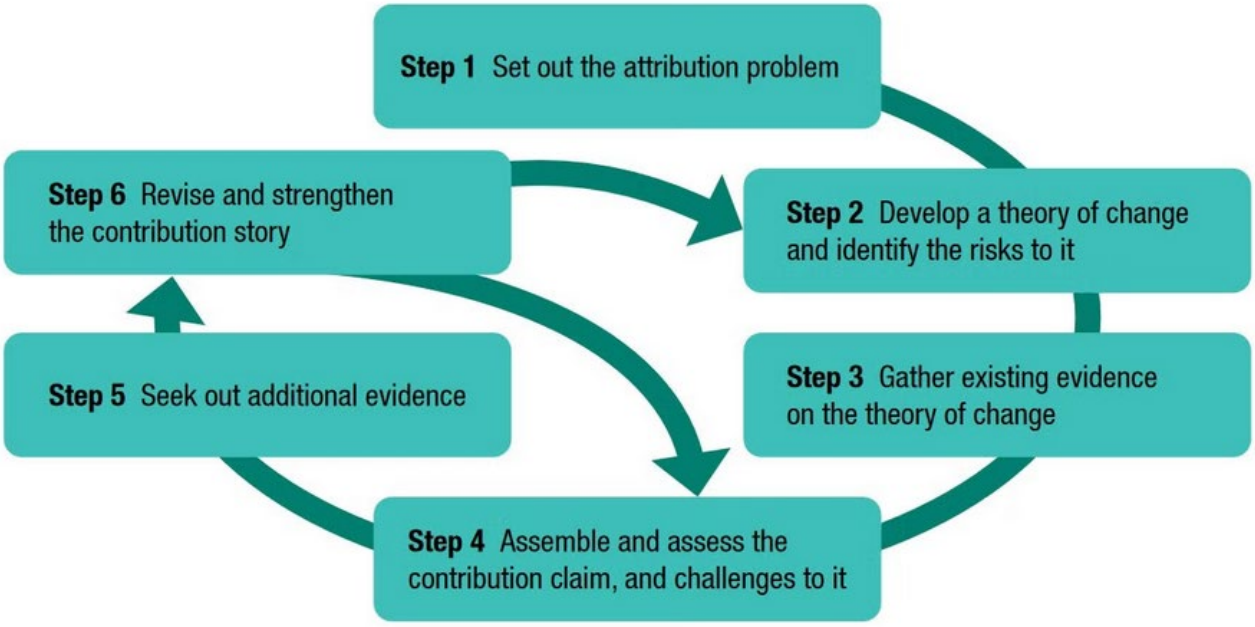
As a method of assessing evidence, contribution analysis allowed evaluators to:

- Establish a nuanced understanding of whether critical pathways set out in the Theory of Changes (ToC) materialised, and if not, why. This came through testing causal assumptions (by gathering data to support or refute them) and refining hypotheses as to whether and how the schemes generate (desired) impact. These refined hypotheses then generate a more evaluable framework for the impact evaluation.
- Draw on a mix of qualitative and quantitative evidence the support or refute the Theory of Change.
- Investigate alternative hypotheses that might (equally or better) explain the outcomes.

The contribution analysis undertaken sought to understand how and why the programmes may have, or have not, influenced outcomes. As elaborated by White (2009) and illustrated by Apgar et. al. (2020) a rigorous TBE is based on six key steps:[6]

[4] See HM Treasury (2024), The Magenta Book, Chapter 3.
[5] Mayne, J (2001). 'Addressing Attribution through Contribution Analysis: Using Performance Measures Sensibly', Canadian Journal of Program Evaluation 16.1: 1–24; Mayne, J (2008). Contribution Analysis: An approach to exploring cause and effect. Brief 16, Institutional Learning and Change (ILAC) Initiative. Mayne, J. (2019). Revisiting contribution analysis. Canadian Journal of Program Evaluation, 34(2), 171–191.
[6] White (2009). Theory-based impact evaluation: principles and practice. International Initiative for Impact Evaluation. 3ie Working Paper 3. Source: https://www.3ieimpact.org/evidence-hub/publications/working-papers

Figure 1 Contribution Analysis steps



Source: Apgar, M., Hernandez, K. and Ton, G., 2020. Contribution analysis for adaptive management. Briefing Note.

During stage 1 of this evaluation, scoping work with DESNZ delivery teams and a review of scheme business cases, monitoring data and wider literature was undertaken to set out the causal problem this evaluation. Theory of Change diagrams were developed for each energy affordability scheme to understand the causal problem and model how the intervention was expected to achieve its outcomes[7] (steps 1[8] and 2). Based on these Theory of Change diagrams, a contribution story was assembled. The evaluation team then collected data on the energy affordability schemes as part of stage 1 of the evaluation (also aligned to the GB interim evaluation data collection), which generated insights into how the intervention was delivered and the outcomes observed (step 3).

Following stage 1 household surveys and qualitative interviews with stakeholders and households, the evaluation team reviewed evidence against the framework, assessing whether the causal links and assumptions held true and what risks had materialised (step 4). This enabled the team to (i) reassess the strengths and weaknesses of the contribution story, (ii)

[7] Weiss, C.H. (1995) 'Nothing as Practical as Good Theory: Exploring Theory-Based Evaluation for Comprehensive Community Initiatives for Children and Families', in J. Connell, A.C. Kubisch, L.B. Schorr and C.H. Weiss (eds*), New Approaches to Evaluating Community Initiatives: Concepts, Methods, and Contexts,* New York NY: The Aspen Institute

[8] Step 1 was completed as part of the scoping stage of the study. It consisted of a desk review of existing programme documentation and literature, a data review and 12 scoping interviews with stakeholders who were involved in the design and delivery of the intervention such as the delivery leads for the energy affordability schemes. These activities built an understanding of the scheme rationale, the expected outcomes and impacts of the schemes and allowed evaluators to explore the theory and assumptions underpinning this. Following this, series of Theory of Change workshops with experts for each scheme (such as DESNZ policy team members) then took place to develop individual scheme Theory of Change diagrams and to test and develop the evaluation framework. The evaluation framework for the contribution analysis was then developed based on the findings from the scoping activities. This was then reviewed by an external expert and DESNZ.

review the strength of the ToC, (iii) identify areas for further data collection (if the evidence is weak). The team then revised the ToC, its contribution story, and the associated hypothesised contribution claims. These iterations helped identify areas for further data collection (step 5) to further strengthen the credibility and undertake final revisions to the ToC and contribution story (step 6). This final step brought together analysis against a set of single statements of the schemes' contribution to observed outcomes (contribution claims), providing an assessment of how much the energy affordability interventions contributed to ToC critical pathways and overall progress towards desired outcomes. To ensure this joined-up robust analysis, meetings between evaluation team members working on evidence streams and with DESNZ were conducted to discuss emerging findings.

Appraisal framework

In appraising the extent to which the schemes contributed to their different intended outcomes, the evaluation team systematically assessed:

- The contribution story being tested – confirmation of the ToC pathway this was being tested via the contribution claim.
- Evidence of change over time in the targeted outcome areas – i.e. whether the positive change which the schemes intended to (help) bring about occurred or not.
- Evidence of scheme contribution to observed change – i.e. whether there is agreement of evidence with the hypothesised outcome/contribution. This considered the magnitude and prevalence of reported contribution to outcomes. The former focuses on how widespread the impact was to provide some indication of the scale of contribution of the scheme. The latter assesses how critical the energy affordability schemes were to the outcome materialising across the eligible population providing some indication of the scale of contribution of the scheme compared to other potential influences or drivers. A final consideration was heterogeneity of experiences or outcomes across households, which considers who are more or less likely to report positive outcomes aligned with the hypothesised contribution.
- Risk of bias of in the findings, given the nature of the evidence and the strengths and limitations of the data collected and the analysis conducted.

The appraisal process

The first dimension of the appraisal involved synthesising findings to understand relevant changes over time and then assessing the degree to which this evidence agreed with the contribution claim. This included synthesising the findings of direct evidence, such as direct indicators or measures of the contribution of the schemes, and separately indirect evidence that accumulated about mechanisms or channels along the ToC leading to an outcome.

The second dimension concerned the prevalence and magnitude of the evidence of the claim. This was how often people said government support contributed to an outcome, for instance a minority or majority of the population (prevalence) and/or the criticality of government support for an outcome materialising for a minority of respondents with the majority suggesting that the contribution is more subtle.

The fourth dimension considered the heterogeneity in reported experiences and outcomes. This considered who were more, or less, likely to report positive outcomes aligned with the contribution claim. This also considered, issues highlighted in the process evaluation and survey evidence about individuals' awareness of the programme.

The fifth dimension involved a critical appraisal of the risk of bias of the evidence underlying the evaluation and its findings. This required understanding factors that increase confidence in the underlying evidence and those that would limit or decrease confidence in the evidence.

Table 5 Dimensions of appraisal

Dimensions of appraisal	Criteria
Agreement of evidence with claim: Is evidence consistent with the hypothesised Theory of Change/ contribution claim?	Direct evidence: Synthesis of evidence that agrees or disagrees with contribution claim. Indirect evidence from ToC channel: Synthesis of evidence that agrees or disagrees with channels leading to outcome in theory of change.
Prevalence of claim: What is the prevalence (how often) of the evidence of this claim? How common are people saying it contributes to the outcome?	Small Minority: 0 – <25% of respondents Minority: 25 – <50% of respondents Majority: 50% – <75% of respondents Vast Majority: 75% – 100% of respondents
Importance / Magnitude: What is the suggested magnitude or importance of the claimed contribution to an outcome occurring?	Critical contribution (or large effects): Important contribution (or medium effects): Subtle contribution (or small effects):
Heterogeneity: To what extent do experiences or outcomes differ across respondents (i.e. extent of heterogeneity)?	Synthesis of findings from different sources of evidence about variation in responses or experiences.
Critical appraisal (risk of bias): To what extent are we confident in the evidence (i.e. that there are no other explanations for findings?)	**Source credibility**: how relevant or expert are the sources consulted? **Sample representativeness**: is the sample sufficient to provide robust indications? **Evidence coverage**: Does the evidence cover all aspects of the causal hypothesis or are there gaps?

	Temporal coverage: Does the data include the relevant time period/s? **Evidence convergence**: Does evidence from different sources indicate similar conclusions? **Evidence plausibility**: Does the evidence align with what is already known or proven in the literature? **Respondent bias**: Is there a risk that any group would be more or less likely to respond a certain way? **Recall challenges**: How likely is it that respondents can recall the past accurately? **Optimism bias**: Does the analysis consider alternative explanations than the hypothesis?

These five dimensions are considered after discussion of each contribution claim in Chapter 6 of the main report.

1.7 Evaluation analysis approach

1.7.1 Data synthesis and triangulation

To triangulate evidence, the evaluation team created a mixed-methods evidence matrix, which mapped different types of data from multiple sources, such as interviews, surveys, or secondary data, against the contribution claims and evaluation questions. A mixed methods evidence matrix is a tool used to integrate and synthesise different types of data and provides a systematic framework for organising, comparing, and analysing data. The matrix consisted of columns representing different data sources and rows for each evaluation question. For each stage of the evaluation, the evidence matrix was used to bring all the relevant data together; the evaluation team's interpretation of evidence was also tested through a validation workshop with DESNZ teams at each stage of the study.

1.8 Methodological Limitations

As with any evaluation approach, there are some limitations with our methodological approach, which are summarised below:

Reduced availability of energy secondary data sources in NI: This report analyses multiple secondary data sources to support the understanding of the NI specific context and the outcomes from the schemes. Compared with the GB evaluation, there are several data sources for which there is no equivalent NI counterpart. The main gap is for access to national energy use data which covers GB only: Smart meter data collected by the Smart Energy

Research Laboratory (SERL)[9] and the National Energy Efficiency Data Framework (NEED)[10]. In addition, there are more limited sources of timely, robust datasets on a wide range of population level issues and fewer sources of NI data that can provide statistical profiles of household income, debt or expenditure.

Price and income elasticity estimation of energy affordability schemes: London Economics was commissioned to estimate price and income elasticities and apply them to various groups or estimates of groups for the NI economy. There were a number of limitations which have affected the robustness of this research, particularly when compared with the same research conducted as part of the evaluation of the GB energy affordability schemes. These limitations related to data availability and are explored further in Annex C. This was initial analysis which will be updated by the forthcoming UK impact and economic evaluation for these schemes. The next evaluation will use additional and more granular data to build upon the modelling presented in this report.

Impact of General Election and school holidays: The timing of the General Election (called for 4th July 2024) meant that the Wave 2 qualitative fieldwork had to be paused, as UK government research could not take place during the pre-election period. This was compounded by the very small window that remained between the election taking place and school summer holidays, where stakeholder engagement and research are traditionally much more difficult to conduct. This impacted the eventual number of stakeholder interviews that were conducted. In addition, the EBSS AF Wave 2 survey closed earlier than planned on 3rd June 2024 due to the pre-election period, which impacted the overall response rate.

Recall / reliance on self-reporting: Surveys and depth interviews with households, energy suppliers and other stakeholders were conducted a considerable time after winter 22/23 and (although not as late) after winter 23/24. This may mean that some people struggled to remember what happened during these periods and also there is some risk that people could be confused about their experiences across the two winters.

Difficulties surveying non-applicants to assess reach of EBSS AF: This research was not able to fully investigate the extent of non- take up of the EBSS AF scheme in NI. For the reasons outlined earlier, the original ‘snowball’ approach (to conduct surveys with a sample of households potentially eligible for the EBSS AF scheme) had to be abandoned because of challenges in using a face-to-face approach with this unknown subgroup. Although some non-applicants to EBSS AF were interviewed during the nationally representative household survey, there were very few identified given the low incidence of this group in the general population. In addition, qualitative research with EBSS AF non-applicants (who may have been eligible for the scheme) could not be completed due to issues identifying and reaching these households in the time available for research.

Coverage of Home Heating Oil stakeholders: The qualitative research under the evaluation did not include stakeholders from the wholesale and commercial oil distributors who would have been able to give evidence of the timing and nature of oil purchasing in NI which could

[9] Smart Energy Research Lab
[10] National Energy Efficiency Data-Framework (NEED)

have helped validate hypotheses about how households using oil for heating i responded to the energy crisis and benefitted from the schemes. This is a gap which is expected to be addressed as part of the forthcoming impact and economic evaluation.

Survey questionnaire: A restriction on space in the survey questionnaires meant that some topics were not explored fully. There were some questions that could have been framed differently or expanded to obtain more useful responses. For example, respondents were asked about strategies they used to be able to afford energy such as turning the heating down or reducing the length of time it was on, but were not asked how harmful such approaches might have been adopted.

Wave 2 response rates for the supplementary EBSS AF survey: There was a lower than anticipated response to the Wave 2 survey, which meant there was less scope for analysis across key sub-groups in the Wave 2 and the longitudinal samples.

Annex A2 Survey methodology

2.1 Introduction

This annex provides an overview of the quantitative survey methodology used in the evaluation of the domestic energy affordability schemes. Quantitative research was conducted via online household surveys across two waves. The sample for the Wave 2 surveys included the same participants from Wave 1 to enable a longitudinal assessment of how their behaviours and situations changed and the reasons for this. For example, in the first wave, it was possible to identify participants who had underheated, gone into debt or reduced spending on necessities due to energy costs, and Wave 2 explored whether these issues persisted or had improved.

The surveys covered the three NI domestic energy affordability schemes launched in 2022: the Energy Price Guarantee (EPG), Energy Bills Support Scheme and Alternative Fuel Payment (EBSS AFP), and the Energy Bills Support Scheme Alternative Funding (EBSS AF). Quantitative research was conducted via push-to-web surveys across two waves comprising a nationally representative household survey and a supplementary survey for the recipients of EBSS AF. The surveys involved sending a letter to households to encourage people to go online to complete a survey.

The questionnaire was formed of a series of modules intended to cover key areas relevant to the evaluation. The survey content was designed to be broadly consistent across intervention groups to enable comparison of key measures. The survey had a longitudinal design to allow for both inter-wave and intra-wave analysis. It featured some key questions which gathered comparative responses from households regarding their experiences during two consecutive winters (2022-23 and 2023-24).

Nationally representative survey of NI households

As EBSS AFP and EPG populations covered most households in NI, these groups were surveyed using a random probability, nationally representative survey of NI households using a ‘push-to-web’ methodology over two waves. This is also referred to as the main household survey. This involved sending a letter to households inviting participants to complete an online survey, with the option to complete the survey by telephone.

Survey of EBSS AF recipients (supplementary survey)

Due to the low incidence of EBSS AF recipients in the general population, a separate (supplementary) survey was conducted, in two waves, among recipients of EBSS AF. This used a push-to-web survey approach. Participants were offered the option of a telephone survey to help include the views of those who may have been digitally excluded.

2.2 Questionnaire development

2.2.1 Wave 1 questionnaire design

The Wave 1 main survey questionnaire was designed to collect data relevant to the evaluation questions, informed by the evaluation framework and theory of change for each scheme (outlined in Section 3 of the synthesis report). It was also intended to align with the equivalent GB survey, with changes for the NI context.

The GB questionnaire was used as a starting point for the NI evaluation to ensure alignment between the two surveys as far as possible. The GB survey had been cognitively tested to improve comprehension (e.g., ambiguous terms or unfamiliar concepts); to avoid bias where respondents felt there was a 'right' answer (i.e. social desirability bias); respondents including/excluding the wrong things in their answer; and response categories which did not cover the likely range of responses[11].

This draft NI questionnaire was further developed and refined following feedback from DESNZ and the Ipsos GB team. While the nationally representative household survey covered all three energy support schemes in NI, separate questionnaires were not necessary for each scheme as there was a high level of overlap between the schemes.

The survey was designed using a 'mobile-first' approach, which took into consideration the look, feel and usability of a questionnaire on a mobile device. This included: a thorough review of the questionnaire length to ensure it would not over burden respondents from focusing on a small screen for a lengthy period, avoiding the use of grid style questions (instead using question loops which are more mobile friendly), and making questions 'finger-friendly' so they are easy to respond to. The questionnaire was also compatible with screen reader software to help those with accessibility requirements.

To capture the views of the digitally excluded, respondents also had the option to complete the survey by telephone. A 'unimode' questionnaire design was applied ensuring the questionnaire is consistent across data collection modes meaning that all respondents are presented with the same question and response categories for the meaning and intent of the question and response options to stay consistent. Questions or instructions sometimes need to be modified to be understood by respondents the same way across different modes, but any such variation is kept to a minimum.

A similar process was followed for the supplementary survey questionnaire which was developed using the relevant questions from the GB alternative scheme survey. This questionnaire was originally developed for a face-to-face approach but was revised when the survey switched from a face-to-face to push-to-web approach.

[11] See the GB interim evaluation report for further details: ADD LINK to GB survey report.

2.2.2 Wave 2 questionnaire design

The Wave 2 questionnaires remained broadly similar to Wave 1. The main focus was on winter 2023/24 for energy consumption, perceived impact on household finances, health and welfare and overall impression of the schemes. Questions on awareness of schemes were removed for both surveys, as the Wave 2 sample mainly consisted of those who had completed Wave 1 who were already familiar with the schemes through the survey itself. Questions about the experience of the schemes were removed since the schemes were not live in Wave 2 (winter 2023-24). A number of demographic questions were only asked of the fresh EBSS AF supplementary survey sample in Wave 2 (e.g., working status, ethnicity, gender, age, education level, housing type, tenure, and year property was built), as well as a question on current electricity or gas supplier.

New questions in Wave 2 included those asking whether households generate their own energy, perceptions of future energy prices and perspectives on the distribution of government energy affordability support, specifically whether it was appropriate to provide schemes to all households rather than focusing on lower-income or vulnerable households. In Wave 2, the survey incorporated more detailed follow-up questions to assess the impact of higher energy costs experienced in the past winter compared to the previous winter.

2.3 Sampling

2.3.1 Sample design for nationally representative household survey

For the survey of EPG and EBSS AFP households, Ipsos sourced the sample from the Postal Address File (PAF). In Wave 1, the aim was to undertake a survey of c. 1,000 households including lower-income, vulnerable households, those with prepayment meters, those with home heating oil (HHO) and those with mains gas central heating.

A number of steps were taken in the sampling process as outlined below:

- Ipsos extracted all the Northern Ireland postcodes available from the latest available postcode Masterfile providing a total number of 48,811 postcodes.
- Ipsos ran these postcodes through the PAF to generate all addresses that were associated with these postcodes generating 876,991 addresses.
- PO boxes, business addresses and non-residential addresses were removed (37,496 records).
- The remaining sample was then cross-checked against Ipsos' Do Not Contact (DNC) list of households that have registered not to be contacted to take part in research removing a further 11,094 addresses.
- The addresses were checked against another large-scale push-to-web survey, being undertaken in Northern Ireland at the same time. To avoid burden on households, a further 49,151 addresses were removed from the Wave 1 sample.

This resulted in a useable sample list of 779,250 which were appended to the Northern Ireland Unitary Authority (NI UA) codes (i.e. Local Government Districts).

The sample was stratified by UA and postcode and a random 1 in n sample was selected by UA based on our assumption of a 6.5% response rate at Wave 1. This provided us with 16,000 addresses that would form the main sample for Wave 1. Table 6 shows the split of the sample by Local Government District and the target to be achieved in each district.

Table 6 Main survey sample: Local Government District, sample size and target

Local Government District	Total sample	Target
Antrim and Newtownabbey	1,280	83
Ards and North Down	1,440	94
Armagh City, Banbridge and Craigavon	1,600	104
Belfast	3,040	198
Causeway Coast and Glens	1,280	83
Derry City and Strabane	1,440	94
Fermanagh and Omagh	800	52
Lisburn and Castlereagh	1,280	83
Mid and East Antrim	1,280	83
Mid Ulster	960	62
Newry, Mourne and Down	1,600	104
Total	16,000	1,040

Following the selection of the 16,000 addresses, Ipsos appended urban/rural classifications and settlement detail. This was done to allow for settlements to be grouped with other settlements of similar characteristics at the analysis stage. There are 8 Bands (A-H) based on the 2011 Census population, and a default classification where settlements in Bands A-E (i.e.,

those with a population greater than or equal to 5,000 people) are classified as urban, and Bands F-H (i.e., those with a population of less than 5,000 people) are classified as rural.

2.3.2 Initial sample design for EBSS AF survey

For the EBSS AF supplementary survey, DESNZ provided an initial sample file of 5,270 records of EBSS AF recipients which formed the sample frame for this survey. The sample file contained variables including name, address, postcode, case origin (i.e., whether household applied online or via phone), opened date, closed date and applicant user group.

Three sample groups were removed from this initial sample. 'Care Homes (self-funded)' were removed to avoid ethical and practical problems accessing these properties. Two records for mental health facilities were removed from the 'Tenants (private)' and 'Tenants (council/association)'. Finally, one address identified as being in GB was removed.

Table 7 EBSS AF Sample cleaning

Original sample provided	5,270
Care homes	280
Mental health facilities	2
Address listed in GB	1
Remaining sample	4,987

Following the cleaning process, Local Government District was appended to each of the records, which enabled the sample to be stratified in the same way as the main household survey.

The survey had originally been designed as a face-to-face survey of not only EBSS AF recipients but also non-applicants. It was intended to identify this latter group using snowball sampling by approaching households in neighbouring properties to EBSS AF recipients to identify those who were eligible but had not applied for the scheme. However, at an early stage of fieldwork, interviewers reported challenges in identifying on the doorstep those who were eligible but who had not applied. Fieldwork was also impacted by extreme weather conditions due to Storm Ciarán which affected Northern Ireland from 29th October to 4th November 2023. During this time, Ipsos completed 52 face-to-face interviews with applicants who had received the EBSS AF payment but at this point the decision was taken to pivot to a push-to-web approach, focusing on interviewing only those who had applied and received the payment.

Following the decision to change methodology, the main household survey was re-purposed to a push-to-web survey for EBSS AF recipients only. Letters with an invitation to participate and a unique link to the survey were issued to all households in the application database who had not already completed a face-to-face interview. The decision to pivot from face-to-face was made on 7th December 2023, when Ipsos had already completed 52 face-to-face interviews with those who applied and received payment. These interviews were completed in the areas

shown in Table 8. This subsequently reduced the sample frame for the push-to-web survey to 4,923 households.

Table 8 Number of completed face-to-face interviews and remaining sample by Local Government District

Local Government District	No. of addresses in original sample	Face-to-face interviews completed	Remaining sample for push-to-web survey
Antrim and Newtownabbey	205	0	205
Ards and North Down	441	0	441
Armagh City, Banbridge and Craigavon	614	34	578
Belfast	278	7	268
Causeway Coast and Glens	529	6	523
Derry City and Strabane	335	0	334
Fermanagh and Omagh	655	0	654
Lisburn and Castlereagh	211	1	209
Mid and East Antrim	429	0	426
Mid Ulster	747	0	746
Newry, Mourne and Down	543	4	539
Grand Total	4,987	52*	4,923*

*Note: The total number of addresses in the remaining sample for the push-web-survey was 4,923 due to 12 refusals to the face-to-face interviews.

2.3.3 Sample selection for the Wave 2 surveys

All respondents who completed Wave 1 and consented to be re-contacted were invited to participate in the Wave 2 surveys (1,233 respondents for the main survey agreed and 379 for

the EBSS AF supplementary survey). In addition, the supplementary EBSS AF Wave 2 sample included 4,221 non-responders from Wave 1, contacted again in order to boost the number of interviews and minimise the effects of attrition. This produced a total sample of 4,600 households invited to take part in the Wave 2 supplementary survey.

2.4 Data Collection

2.4.1 Data collection for nationally representative household survey

Wave 1

Letters were mailed on 25th October 2023, inviting an adult responsible for paying energy bills, either solely or jointly, to complete the survey. A unique link for the online survey was provided in the initial invitation. Up to three reminder letters were sent to non-responding addresses to help maximise the response rate. An incentive payment in the form of a gift voucher (£10) was offered to respondents on completion of the survey. The survey closed on 20th November 2023.

A total of 1,396 survey responses were achieved, with 1,384 completed online and 12 by telephone. This provided an unadjusted response rate of 8.7% and an adjusted response rate of 8.8%[12] when removing addresses which no longer existed, were inaccessible etc.

Of these, 1,233 respondents agreed to be recontacted (88%) and this formed the sample frame for the second wave.

Wave 2

Letters were mailed to all 1,233 households for the second survey on 10th April 2024, inviting the respondent who completed the first survey to take part.

A further three reminder letters were sent to non-responding households. Email reminders for those who had provided a valid email address at Wave 1 were also sent to help maximise response to the survey. Respondents were offered a £10 gift voucher if they completed the survey. Fieldwork for Wave 2 closed on 24th May 2024.

A total of 847 surveys were completed at Wave 2 (830 online and 17 via telephone), with an overall response rate of 69%.

Table 9 sets out the number of survey invitations and responses by Local Government District for Waves 1 and 2 of the household survey.

[12] The adjusted response rate has been calculated by removing those who Ipsos did not make contact with (152 addresses). These letters were returned with the following outcomes: Address inaccessible (73), Address incomplete (2), No longer living at address (30), Addressee unknown (9), No such address (38).

Table 9 Number of invitations and completes to Waves 1 and 2 of the nationally representative household survey

Local Government District	Invited to Wave 1		Achieved interviews at Wave 1		Recontact sample available for Wave 2		Achieved interviews at Wave 2	
	No.	**%**	**No.**	**%**	**No.**	**%**	**No.**	**%**
Antrim and Newtownabbey	1,280	8%	135	10%	124	10%	83	10%
Ards and North Down	1,440	9%	166	12%	151	12%	109	13%
Armagh City, Banbridge and Craigavon	1,600	10%	125	9%	110	9%	71	8%
Belfast	3,040	19%	227	16%	205	17%	146	17%
Causeway Coast and Glens	1,280	8%	110	8%	94	8%	67	8%
Derry City and Strabane	1,440	9%	89	6%	76	6%	54	6%
Fermanagh and Omagh	800	5%	57	4%	51	4%	40	5%
Lisburn and Castlereagh	1,280	8%	148	11%	133	11%	90	11%
Mid and East Antrim	1,280	8%	147	11%	129	10%	86	10%
Mid Ulster	960	6%	60	4%	46	4%	28	3%
Newry, Mourne and Down	1,600	10%	132	9%	114	9%	73	9%
Total	16,000	100%	1,396	100%	1,233	100%	847	100%

2.4.2 Profile of households (main survey)

Table 10, below, shows the profile, in terms of key characteristics, of those who completed the main household survey. The profile data is presented before weighting adjustments are applied (i.e. unweighted figures). See Section 2.5 for weighting.

Table 10 Profile of achieved sample (main survey)

S1. Are you responsible or jointly responsible for the gas and/or electricity bills in your household?				
	Wave 1 Unweighted	**Wave 1 Weighted**	**Wave 2 Unweighted**	**Wave 2 Weighted**
Base: All	**1,396**	**1,396**	**847**	**847**
Yes, me alone	51%	51%	51%	51%
Yes, me and someone else (e.g. partner, housemate) jointly	47%	47%	48%	48%
No	1%	1%	1%	1%

S2. Do you have mains gas and/or mains electricity in your household?				
	Wave 1 Unweighted	**Wave 1 Weighted**	**Wave 2 Unweighted**	**Wave 2 Weighted**
Base: All	**1,396**	**1,396**	**847**	**847**
Both mains gas and mains electricity	40%	37%	41%	37%
Mains electricity only	56%	58%	57%	61%
Mains gas only	1%	1%	*	*
Neither mains gas nor mains electricity	*	1%	*	*

The symbol * denotes values greater than zero but less than 0.5%.

S3. How does your household pay for your electricity?				
	Wave 1 Unweighted	**Wave 1 Weighted**	**Wave 2 Unweighted**	**Wave 2 Weighted**
Base: All respondents with mains electricity	**1,331**	**1,326**	**833**	**831**
Monthly/quarterly direct debit (where your energy supplier takes the same amount of money from your bank account automatically)	56%	56%	58%	56%
Pay by cheque, cash or card on receipt of a bill from your energy supplier	7%	7%	7%	7%
Keypad / Prepayment meter, where you top up credit on to a key or card	14%	14%	16%	16%
Keypad / Prepayment meter, where you top up credit online or using a mobile app	20%	20%	16%	18%
Pay to an intermediary such as a landlord, housing manager, site owner or someone else	*	*	*	1%

The symbol * denotes values greater than zero but less than 0.5%.

J5. What is the main way you heat your home?				
	Wave 1 Unweighted	**Wave 1 Weighted**	**Wave 2 Unweighted**	**Wave 2 Weighted**
Base: All	**1,396**	**1,396**	**847**	**847**
Gas (central heating)	32%	30%	34%	30%
Oil	43%	45%	42%	45%
Solid fuel - coal	1%	1%	1%	1%
Solid fuel – biomass (for example wood)	*	*	1%	1%
Electric (storage)	2%	2%	2%	2%
Natural gas	4%	4%	4%	4%
Electric (not storage)	1%	1%	1%	1%
Solid fuel (open fire/enclosed stove) - coal	3%	3%	3%	3%
Solid fuel (open fire/enclosed stove) - wood	3%	3%	3%	3%
LPG (liquefied petroleum gas)	1%	*	1%	1%
Electric	6%	6%	6%	7%
Other portable heater	1%	1%	*	*
Communal or district heating (heat networks)	*	*	*	*
Heat pump	1%	1%	1%	1%

The symbol * denotes values greater than zero but less than 0.5%.

J3. What type of property do you live in?				
	Wave 1 Unweighted	**Wave 1 Weighted**	**Wave 2 Unweighted**	**Wave 2 Weighted**
Base: All	**1,396**	**1,396**	**847**	**847**
House - detached	27%	26%	29%	28%
House – semi-detached	29%	29%	29%	28%
House – end terrace	7%	7%	7%	7%
House – mid terrace	13%	13%	12%	12%
Bungalow	14%	14%	14%	15%
Flat	7%	7%	7%	7%
Maisonette	*	*	*	*
A park home	-	-	-	-
A mobile home	-	-	-	-
A caravan	-	-	-	-
A residential care home, nursing home or retirement home	-	-	-	-
Houseboat	-	-	-	-
Farmhouse	1%	1%	1%	1%

The symbol * denotes values greater than zero but less than 0.5%.

Annual household income (after mortgage/ rent)				
	Wave 1 Unweighted	**Wave 1 Weighted**	**Wave 2 Unweighted**	**Wave 2 Weighted**
Base (see notes)*	**1,396**	**1,396**	**771**	**758**
Under £5,000	7%	8%	6%%	7%
£5,000 to £9,999	10%	10%	12%	13%
£10,000 to £15,999	11%	11%	13%	14%
£16,000 to £19,999	9%	9%	10%	10%
£20,000 to £24,999	10%	10%	11%	11%
£25,000 to £29,999	8%	7%	6%	6%
£30,000 to £34,999	8%	8%	7%	7%
£35,000 to £39,999	6%	6%	8%	7%
£40,000 to £44,999	4%	4%	6%	6%
£45,000 to £49,999	4%	4%	5%	5%
£50,000 to £74,999	7%	7%	7%	6%
£75,000 or more	2%	2%	4%	4%

*Base: Those who stated they know their weekly, monthly or yearly household income.

Note: Answer options such as ‘Prefer not to say’ and ‘Don’t know’ are not shown but are included within the base totals.

Gender of respondent				
	Wave 1 Unweighted	**Wave 1 Weighted**	**Wave 2 Unweighted**	**Wave 2 Weighted**
Base: All	**1,396**	**1,396**	**847**	**847**
Man	42%	43%	43%	42%
Woman	56%	55%	57%	57%
Non-binary	*	*	*	*
My gender is not listed	*	*	-	-

The symbol * denotes values greater than zero but less than 0.5%.

Age of respondent				
	Wave 1 Unweighted	**Wave 1 Weighted**	**Wave 2 Unweighted**	**Wave 2 Weighted**
Base: All	**1,396**	**1,396**	**847**	**847**
16-34	15%	15%	11%	14%
35-44	19%	20%	20%	20%
45-54	21%	21%	23%	22%
55-64	18%	18%	19%	17%
65-74	15%	15%	17%	16%
75+	18%	17%	8%	8%

Ethnicity of respondent				
	Wave 1 Unweighted	**Wave 1 Weighted**	**Wave 2 Unweighted**	**Wave 2 Weighted**
Base: All	**1,396**	**1,396**	**847**	**847**
Northern Irish/English/ Welsh/ Scottish/ British	72%	70%	75%	3%
Irish	17%	19%	17%	17%
Gypsy or Irish Traveller	*	*	*	*
Any other White background	4%	4%	3%	4%
White and Black Caribbean	*	*	-	-
White and Black African	*	*	*	*
White and Asian	*	*	*	*
Any other Mixed/Multiple ethnic background	*	*	*	*
Indian	1%	1%	1%	1%
Pakistani	*	*	*	1%
Bangladeshi	-	-	-	*
Chinese	1%	1%	1%	*
Any other Asian background	1%	1%	*	1%
African	1%	1%	*	*
Caribbean	*	*	*	*
Any other Black/African/ Caribbean background	-	-	-	-
Arab	-	-	-	-
Any other ethnic group	*	*	*	*

Note: Percentages may not sum to 100% due to rounding and that 'Prefer not to say' and 'Don't know' are not shown but are included within the base totals. The symbol * denotes values greater than zero but less than 0.5%.

2.4.3 Data Collection for EBSS AF supplementary survey

Wave 1

Following the move to the revised approach, further invite letters were sent to the whole sample. A unique link for the online survey was provided in the invitation. Fieldwork closed on 26th January 2024.

In total, 487 survey responses were achieved via the push-to-web approach (457 online and 30 by telephone) using DESNZ sample. A further 52 interviews were conducted face-to-face from the initial fieldwork which gave a total of 539 responses at Wave 1.

At the end of the Wave 1 survey, 379 respondents agreed to be recontacted for Wave 2 (70%). The non-responders (4,221) from Wave 1 were also included in the sample providing a total sample of 4,600 households that were invited to take part in the second survey.

This represented an unadjusted response rate of 10.8% and an adjusted response rate of 11.1%[13] at Wave 1.

Wave 2

At Wave 2, 363 surveys were completed (262 from the Wave 1 recontact sample and 101 from the original sample that had not responded at Wave 1). The majority of the surveys were completed online (340) with only a small number (23) by telephone. Data for the second wave was collected between 16th April and 3rd June 2024. Due to the general election being called on 4th July, as per government guidelines for the pre-election period, DESNZ and Ipsos closed fieldwork on the 3rd June.

A range of measures were taken in the supplementary survey to encourage participation, including sending up to three reminder letters and incentives (£30 worth of gift vouchers for those who completed both waves and a £10 gift voucher for one wave). An email reminder was also sent to respondents who provided a valid email address at Wave 1.

Ipsos achieved an overall response rate of 7.9 % at Wave 2. For the longitudinal sample (those who took part in Wave 1 and were recontacted for Wave 2), 69% responded.

Table 11 sets out the number of survey invitations and responses by Local Government District for the Waves 1 and 2 survey.

[13] The adjusted response rate has been calculated by removing those who Ipsos did not make contact with (111 addresses). These letters were returned with the following outcomes: Address inaccessible (13), Address incomplete (9), No longer living at address (65), Addressee unknown (22), Addressee Deceased (2).

Table 11 Number of invitations and completes for the EBSS AF survey

Local Government District	Invited to Wave 1*		Achieved interviews at Wave 1		Recontact sample available for Wave 2		Achieved at Wave 2 from recontact sample		Top-up sample of non-responders for Wave 2		Achieved at Wave 2 from non-responders		Total achieved at Wave 2	
	No.	**%**	**No.**	**%**	**No.**	**%**	**No.**	**%**	**No.**	**%**	**No.**	**%**	**No.**	**%**
Antrim and Newtownabbey	205	4%	19	4%	14	4%	5	2%	178	4%	3	3%	8	2%
Ards and North Down	441	9%	54	10%	42	11%	28	11%	369	9%	21	21%	49	13%
Armagh City, Banbridge and Craigavon	614	12%	98	18%	54	14%	39	15%	494	12%	12	12%	51	14%
Belfast	278	6%	30	6%	22	6%	17	6%	189	4%	1	1%	18	5%
Causeway Coast and Glens	529	11%	53	10%	38	10%	27	10%	463	11%	10	10%	37	10%
Derry City and Strabane	335	7%	25	5%	15	4%	8	3%	286	7%	10	10%	18	5%
Fermanagh and Omagh	655	13%	68	13%	50	13%	33	13%	569	13%	10	10%	43	12%
Lisburn and Castlereagh	211	4%	27	5%	18	5%	15	6%	166	4%	5	5%	20	5%

Mid and East Antrim	429	9%	37	7%	24	6%	19	7%	366	9%	6	6%	25	7%
Mid Ulster	747	15%	64	12%	52	14%	38	15%	670	16%	9	9%	47	13%
Newry, Mourne and Down	543	11%	64	12%	50	13%	33	13%	471	11%	14	14%	47	13%
Total	4,987		539		379		262		4,221		101		363	

*Note: This includes the total sample available for Wave 1 including households contacted for a face-to-face interview. It does not include other households initially contacted through snowballing before switching to a push-to-web approach

2.4.4 Profile of households for the EBSS AF survey

Table 12, below, shows the profile, in terms of key characteristics, of those who completed the EBSS AF survey. The profile data is presented before weighting adjustments are applied (i.e. unweighted figures). See Section 2.5 for weighting.

Table 12 Profile of achieved sample (EBSS AF survey)

S1. Are you responsible or jointly responsible for the gas and/or electricity bills in your household?				
	Wave 1 Unweighted	**Wave 1 Weighted**	**Wave 2 Unweighted**	**Wave 2 Weighted**
Base: All	**539**	**539**	**363**	**363**
Yes, me alone	57%	57%	55%	54%
Yes, me and someone else (e.g., partner, housemate) jointly	39%	38%	42%	42%
No	3%	3%	3%	3%

S2. Do you have mains gas and/or mains electricity in your household?				
	Wave 1 Unweighted	**Wave 1 Weighted**	**Wave 2 Unweighted**	**Wave 2 Weighted**
Base: All	**539**	**539**	**363**	**363**
Both mains gas and mains electricity	13%	13%	15%	13%
Mains electricity only	82%	82%	80%	82%
Mains gas only	1%	*	*	*
Neither mains gas nor mains electricity	2%	2%	4%	3%

The symbol * denotes values greater than zero but less than 0.5%.

S3. How does your household pay for your electricity?				
	Wave 1 Unweighted	**Wave 1 Weighted**	**Wave 2 Unweighted**	**Wave 2 Weighted**
Base: All with mains electricity	**511**	**512**	**345**	**345**
Monthly/quarterly direct debit	50%	50%	48%	48%
Pay by cheque, cash or card on receipt of a bill	19%	19%	17%	18%
Keypad / Prepayment meter, top up credit on to a key or card	2%	2%	4%	4%
Keypad / Prepayment meter, top up credit online or using a mobile app	3%	3%	2%	2%
Pay to an intermediary such as a landlord, housing manager, site owner	16%	16%	18%	16%

J5. What is the main way you heat your home?				
	Wave 1 Unweighted	**Wave 1 Weighted**	**Wave 2 Unweighted**	**Wave 2 Weighted**
Base: All	**539**	**539**	**363**	**363**
Gas (central heating)	13%	12%	13%	11%
Oil	59%	59%	55%	56%
Solid fuel - coal	1%	1%	2%	2%
Solid fuel – biomass (for example wood)	2%	2%	2%	2%
Electric (storage)	1%	1%	1%	1%
Natural gas	1%	1%	2%	2%
Electric (not storage)	1%	1%	2%	2%
Solid fuel (open fire/enclosed stove) - coal	4%	4%	5%	5%
Solid fuel (open fire/enclosed stove) - wood	7%	8%	8%	8%
LPG (liquefied petroleum gas)	1%	1%	1%	1%
Electric	6%	6%	4%	4%
Other portable heater	1%	1%	1%	1%
Communal or district heating (heat networks)	1%	1%	*	*
Heat pump	1%	2%	2%	2%

The symbol * denotes values greater than zero but less than 0.5%.

J3. What type of property do you live in?				
	Wave 1 Unweighted	**Wave 1 Weighted**	**Wave 2 Unweighted**	**Wave 2 Weighted**
Base: All	**539**	**539**	**363**	**363**
House - detached	27%	27%	29%	30%
House – semi-detached	4%	3%	5%	5%
House – end terrace	*	*	-	-
House – mid terrace	2%	2%	1*%	1%
Bungalow	13%	13%	17%	17%
Flat	6%	6%	5%	5%
Maisonette	*	*	*	*
A park home	5%	5%	7%	5%
A mobile home	*	*	1%	1%
A caravan	-	*	1%	1%
A residential care home, nursing home or retirement home	-	-	*	*
Houseboat	1%	1%	1%	1%
Farmhouse	38%	37%	31%	31%

The symbol * denotes values greater than zero but less than 0.5%.

Annual household income				
	Wave 1 Unweighted	**Wave 1 Weighted**	**Wave 2 Unweighted**	**Wave 2 Weighted**
Base (see notes)	**539**	**539**	**285**	**278**
Under £5,000	5%	5%	4%	4%
£5,000 to £9,999	14%	14%	18%	19%
£10,000 to £15,999	10%	10%	14%	14%
£16,000 to £19,999	9%	9%	10%	10%
£20,000 to £24,999	6%	6%	14%	13%
£25,000 to £29,999	6%	6%	9%	10%
£30,000 to £34,999	4%	4%	7%	6%
£35,000 to £39,999	4%	4%	4%	4%
£40,000 to £44,999	3%	3%	5%	4%
£45,000 to £49,999	2%	2%	2%	2%
£50,000 to £74,999	3%	3%	5%	5%
£75,000 or more	1%	1%	2%	2%

*Base: Those who stated they know their weekly, monthly or yearly household income

*Note: Answer options such as ‘Prefer not to say’ and ‘Don’t know’ are not shown but are included within the base totals.

Gender of respondent				
	Wave 1 Unweighted	**Wave 1 Weighted**	**Wave 2 Unweighted**	**Wave 2 Weighted**
Base: All	**539**	**539**	**363**	**363**
Man	63%	62%	60%	61%
Woman	36%	36%	39%	38%
Non-binary	-	-	-	-
My gender is not listed	-	-	*	*

The symbol * denotes values greater than zero but less than 0.5%.

Age of respondent				
	Wave 1 Unweighted	**Wave 1 Weighted**	**Wave 2 Unweighted**	**Wave 2 Weighted**
Base: All	**539**	**539**	**363**	**363**
16-34	7%	7%	6%	5%
35-44	9%	9%	9%	9%
45-54	15%	16%	12%	14%
55-64	22%	22%	20%	20%
65-74	26%	25%	28%	27%
75+	16%	26%	22%	21%

Ethnicity of respondent				
	Wave 1 Unweighted	**Wave 1 Weighted**	**Wave 2 Unweighted**	**Wave 2 Weighted**
Base: All	**539**	**539**	**363**	**363**
Northern Irish/ English/ Welsh/ Scottish/ British	83%	83%	83%	83%
Irish	11%	12%	12%	13%
Gypsy or Irish Traveller	-	-	-	-
Any other White background	2%	2%	1%	1%
White and Black Caribbean	-	-	-	-
White and Black African	-	-	-	-
White and Asian	-	-	-	-
Any other Mixed/ Multiple ethnic background	-	-	-	-
Indian	-	-	*	*
Pakistani	-	-	-	-
Bangladeshi	-	-	-	-
Chinese	*	*	*	*
Any other Asian background	*	*	*	*
African	-	-	-	-
Caribbean	-	-	-	-
Any other Black/ African/ Caribbean background	-	-	-	-
Arab	*	*	*	*
Any other ethnic group	*	*	1%	1%

Note: Percentages may not sum to 100% due to rounding and that 'Prefer not to say' and 'Don't know' are not shown but are included within the base totals. The symbol * denotes values greater than zero but less than 0.5%.

2.4.5 Letters and reminders

The recruitment approach for both surveys involved inviting respondents to take part in an online survey via a letter to their home (or via email, which was used in Wave 2, detailed further below). The invitation letter provided each household with a unique link to their survey. Each link could only be used once to complete the survey. This prevented duplicate responses across households. To capture the views of the digitally excluded, respondents also had the option to complete the survey by telephone.

Letter design

The letters were designed to provide all information required by the respondent to complete the survey and to answer common queries. The guiding principles for designing the letters were to use simple and easy to understand language and to cover key messages. The main motivational statements varied across the initial invitation and reminder letters, with the aim of increasing the likelihood of converting non-respondents. While all letters placed a degree of emphasis on the financial motivator for taking part (receiving a £10/£20 gift voucher), the reminder letter emphasised this incentive by mentioning it for a second time in the prominent "reasons for taking part" section.

Online questionnaire accessibility

The online questionnaire was designed to be as accessible as possible to respondents. The survey was designed to be accessed using a range of devices, including desktop computers, laptops, smartphones, tablets and other small screen devices. This ensured that respondents could participate using their preferred device without any issues. Additionally, the online questionnaire was designed in a way that made it easy for people to adjust colour contrasts and increase font size.

For respondents without online access or who preferred not to complete the survey online, a telephone number was provided to schedule an interview with a telephone interviewer at Ipsos. Telephone interviews were conducted with 12 respondents in Wave 1 and 17 respondents in Wave 2 for the main household survey and 30 in Wave 1 and 23 in Wave 2 for the supplementary survey of EBSS AF recipients.

Incentives

Incentives were used to encourage participation in the survey and boost response rates. A £10 incentive was offered upon completion of both surveys in each of Waves 1 and 2. For the EBSS AF supplementary survey in £30 worth of gift vouchers were provided for those who completed both waves and a £10 gift voucher for one wave). At the end of the survey, respondents could choose to receive a Love2shop voucher. Those who provided their email address received an e-voucher, while those who did not have an email address, or preferred not to provide an email address, received a paper postal voucher redeemable online at the Love2Shop website.

Minimising error in the surveys

As with all surveys, push-to-web surveys are vulnerable to error. To address this, a range of approaches were taken, including supplementing the longitudinal sample with fresh sample in the Wave 2 EBSS AF survey (to minimise coverage error), making the survey easy to complete (e.g. “mobile-first” design principles to reduce measurement error) and the option of telephone interviews and providing incentives (to reduce non-response).

2.4.5 Data management and coding

Coding

Coding was carried out on two open-ended questions in Wave 1 and a number of questions which included 'other specify' options in both Wave 1 and Wave 2, where a list of answer options at a survey question also included an option allowing respondents to write in their own answer if appropriate. A code frame was developed by Ipsos' dedicated coding team. This was reviewed and edited before being included in the datasets.

Checks on data tables and SPSS

Ipsos checked the data tables against the table specification, ensuring all questions were included, that down-breaks included all categories from the question, that base sizes were correct (e.g., for filtered questions), base text is correct, cross-breaks add up and are using the correct categories, nets have summed the correct codes, and that summary and recoded tables are included. Weighting of the tables was also checked by applying the correct weight on the SPSS file then running descriptives and cross-break tabulations to check that this matches up with the values on the tables.

Checks on respondent eligibility

In order to ensure that all relevant scheme recipients were in each data set (EPG, EBSS AFP, EBSS AF) additional check questions were used to verify household eligibility for the correct scheme i.e., making sure they are not stating they are eligible for both EBSS AFP and EBSS AF, only one or the other.

2.5 Weighting

2.5.1 Wave 1 nationally representative household survey

The main household survey was weighted by Local Government District based on the Northern Ireland Statistics and Research Agency (NISRA) household population estimates for Northern Ireland. Table 13 shows the weighting profile targets.

Table 13 Weighting profile targets

Local Government District	No. in population	Target Population Profile	Unweighted	Final Weighted Sample
Antrim and Newtownabbey	116,396	7.7%	9.7%	7.7%
Ards and North Down	133,991	8.8%	11.9%	9.2%
Armagh City, Banbridge and Craigavon	170,415	11.3%	9.0%	11.0%
Belfast	279,306	18.4%	16.3%	19.4%
Causeway Coast and Glens	114,159	7.5%	7.9%	7.5%
Derry City and Strabane	118,813	7.8%	6.4%	7.9%
Fermanagh and Omagh	92,013	6.1%	4.1%	5.9%
Lisburn and Castlereagh	118,922	7.9%	10.6%	7.8%
Mid and East Antrim	113,075	7.5%	10.5%	7.6%
Mid Ulster	115,658	7.6%	4.3%	7.0%
Newry, Mourne and Down	141,996	9.4%	9.5%	8.9%
Total	**1,514,744**	**100.0%**	**100.0%**	**100.0%**

2.5.2 Wave 1 supplementary survey of EBSS AF households

The supplementary survey of EBSS AF households was weighted to the regional distribution of EBSS AF recipients in the sample file provided by DESNZ.

Table 14 Weighting profile targets

Local Government District	No. in population	Target population Profile	Unweighted	Final Weighted Sample
Antrim and Newtownabbey	205	4.1%	3.5%	4.1%
Ards and North Down	441	8.8%	10.0%	8.9%
Armagh City, Banbridge and Craigavon	614	12.3%	18.2%	11.7%
Belfast	278	5.6%	5.6%	5.4%
Causeway Coast and Glens	529	10.6%	9.8%	10.6%
Derry City and Strabane	335	6.7%	4.6%	6.9%
Fermanagh and Omagh	655	13.1%	12.6%	13.4%
Lisburn and Castlereagh	211	4.2%	5.0%	4.3%
Mid and East Antrim	429	8.6%	6.9%	8.7%
Mid Ulster	747	15.0%	11.9%	15.2%
Newry, Mourne and Down	543	10.9%	11.9%	10.9%
Total	**4987**	**100.0%**	**100.0%**	**100.0%**

2.5.3 Wave 2 surveys

Due to the longitudinal nature of the Wave 2 data, which includes respondents who also completed the Wave 1 surveys, a longitudinal weight was applied. This accounted for potential bias introduced from attrition (respondents in Wave 1 not taking part in Wave 2) and to ensure

the Wave 2 data accurately reflects the composition of the Wave 1 sample to enable comparison between the two waves.

The Wave 2 longitudinal weights for each dataset were calculated as follows:

1. A stepwise logistic regression model was run to identify characteristics significantly associated with differential patterns of response and non-response. A 'probability of responding' value (between 0 and 1) was generated.
2. A non-response weight was calculated using the inverse of this probability value (NRwt = 1 / probability). The distribution of this non-response weight from the model was checked and the weight was trimmed to mitigate the potential for extreme weights.
3. The trimmed non-response weight from the model was multiplied by the final Wave 1 weight to obtain a combined weight.
4. The combined weight was calibrated (i.e. further weighted) to the population percentages of the calibration variables.

Model Details and Weighting Adjustments

The following variables were used in the stepwise logistic regression model for both surveys: age, work status, highest education qualification, housing tenure, annual household income (after rent/mortgage), region, energy bill payment type, main energy source, property type, household size, and whether a household member has a disability. Energy tariff and ethnicity was also included in the regression model for the nationally representative household survey. For the EBSS AF survey, gender was also included. These variables enabled us to identify characteristics associated with differential patterns of response and non-response.

The final model, used to calculate the non-response weights for the nationally representative household survey, included the following variables: age, highest education qualification, housing tenure, main energy source and household size.

The final model, used to calculate the non-response weights for the EBSS AF survey, included annual household income (after rent/mortgage). The resulting Wave 2 calibrated longitudinal weight is appropriate both for longitudinal and cross-sectional analysis.

The non-response weights for both surveys were trimmed at the 1st percentile and the 99th percentile to reduce the range of the weights and hence improve the efficiency. This involved setting the extreme values to the corresponding values at the 1st and 99th percentiles. These non-response weights were then combined with the final Wave 1 weights, and these were adjusted to the same population totals as were used for Wave 1 using calibration weighting.

Table 15 Unweighted and weighted profile for the main household survey

Local Government District	Target Population Profile	Unweighted	Non-Response Adjusted Weight	Final Weighted Sample
Antrim and Newtownabbey	7.7%	9.8%	7.8%	7.7%
Ards and North Down	8.8%	12.9%	9.7%	8.8%
Armagh City, Banbridge and Craigavon	11.3%	8.4%	10.1%	11.3%
Belfast	18.4%	17.2%	20.2%	18.4%
Causeway Coast and Glens	7.5%	7.9%	7.6%	7.5%
Derry City and Strabane	7.8%	6.4%	8.1%	7.8%
Fermanagh and Omagh	6.1%	4.7%	7.3%	6.1%
Lisburn and Castlereagh	7.9%	10.6%	8.2%	7.9%
Mid and East Antrim	7.5%	10.2%	7.4%	7.5%
Mid Ulster	7.6%	3.3%	5.6%	7.6%
Newry, Mourne and Down	9.4%	8.6%	8.1%	9.4%
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Table 16 Unweighted and weighted profile for EBSS AF - Longitudinal weighting

Local Government District	Target Population Profile	Unweighted	Non-Response Adjusted Weight	Final Weighted Sample
Antrim and Newtownabbey	4.1%	1.9%	2.1%	4.1%
Ards and North Down	8.8%	10.7%	9.2%	8.8%
Armagh City, Banbridge and Craigavon	12.3%	14.9%	10.2%	12.3%
Belfast	5.6%	6.5%	6.6%	5.6%
Causeway Coast and Glens	10.6%	10.3%	10.9%	10.6%
Derry City and Strabane	6.7%	3.1%	4.6%	6.7%
Fermanagh and Omagh	13.1%	12.6%	13.2%	13.1%
Lisburn and Castlereagh	4.2%	5.7%	4.8%	4.2%
Mid and East Antrim	8.6%	6.9%	8.2%	8.6%
Mid Ulster	15.0%	14.6%	18.6%	15.0%
Newry, Mourne and Down	10.9%	12.6%	11.5%	10.9%
Grand Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Table 17 Unweighted and weighted profile for EBSS AF - Final combined weighting

Region	Target Population Profile	Unweighted	Non-Response Adjusted Weight	Final Weighted Sample
Antrim and Newtownabbey	4.1%	2.2%	2.5%	4.1%
Ards and North Down	8.8%	13.4%	11.5%	8.8%
Armagh City, Banbridge and Craigavon	12.3%	14.0%	9.5%	12.3%
Belfast	5.6%	4.9%	5.0%	5.6%
Causeway Coast and Glens	10.6%	10.1%	10.7%	10.6%
Derry City and Strabane	6.7%	4.9%	7.2%	6.7%
Fermanagh and Omagh	13.1%	12.3%	12.8%	13.1%
Lisburn and Castlereagh	4.2%	5.5%	4.5%	4.2%
Mid and East Antrim	8.6%	6.8%	8.2%	8.6%
Mid Ulster	15.0%	12.9%	16.4%	15.0%
Newry, Mourne and Down	10.9%	12.9%	11.7%	10.9%
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**

2.5.4 Confidence Intervals and Margin of Error

As a worked through example, the overall sample for Wave 1 of the main household survey has a margin of error range of ±1.6 to ±2.7 percentage points, based on a 95% confidence interval calculation (Table 18). If the main household survey was conducted 100 times (each time with a different nationally representative sample), the results are expected to be within 1.6 to 2.7 percentage points of the results achieved here in 95 out of those 100 cases. The range illustrates that survey results closer to 50% tend to have higher margins of error. If 90% of surveyed respondents said they paid they energy bills by direct debit, this result would have a margin of error of ±1.6 percentage points, whereas if only 50% said this, the margin of error would be ±2.7 percentage points. The margins of error are calculated using the effective sample sizes (which take into account survey weighting).

Margins of error for each sample group for different survey estimates

Table 18 Margins of Error for the main household survey (in percentage points)

Sample group	Sample size	Effective sample size	10% or 90% estimate	30% or 70% estimate	50% estimate
Wave 1	1,396	1,309	±1.6	±2.5	±2.7
Wave 2	847	732	±2.2	±3.3	±3.6

Table 19 Margins of Error for the EBSS AF survey (in percentage points)

Sample group	Sample size	Effective sample size	10% or 90% estimate	30% or 70% estimate	50% estimate
Wave 1 EBSS AF	539	515	±2.5	±3.7	±4.1
Wave 2 EBSS AF overall sample	363	330	±3.1	±4.8	±5.2
Wave 2 EBSS AF longitudinal Sample	261	227	±3.8	±5.8	±6.4

2.6 Analysis of survey data

The analysis of the survey data comprised a descriptive analysis of respondents' responses and the sample's characteristics, including tables and cross-tabulations showing variables distributions and the statistical significance between different groups of respondents' responses.[14] Survey data was analysed and reported at a total population level and, where relevant by bivariate descriptive analyses of outcome variables by relevant subgroups (for example, gender, age or property type). Statistical significance testing (at a 95% confidence level) was used to determine if differences in responses between different subgroups represented a true difference or random variation. Only differences between subgroups or different survey waves (i.e. Wave 1 and Wave 2) that are statistically significant are interpreted in this report, unless otherwise stated.

14 Statistical tests reporting the significance of the differences between groups responses to survey questions using a z-test with a confidence interval of 95%.

Annex A3: Qualitative methodology

Qualitative, semi-structured interviews were held with household and relevant stakeholders to provide insights into people's experiences and perceptions of the domestic energy affordability schemes and self-reported impacts of the schemes on aspects such as household finances, energy consumption, health and welfare. The research was conducted in two waves (Wave 1: October 2023 – January 2024; Wave 2: May – August 2024) and all interviews lasted between 45 – 60 minutes.

All interviews were conducted online or by telephone and any findings were reported on anonymously – additionally participants received an information sheet, consent form and privacy notice, giving an overview of the project, their role and outlining their rights around the data they were sharing in the interviews, which was reiterated at the start of each interview. All interviews were audio-recorded and written up by interviewers.

3.1 Recruitment

3.1.1 Wave 1

Wave 1 of this research was conducted after the support schemes were administered, interviews taking place between October 2023 and January 2024. Interviews were recruited via survey respondents, a mix of on-street and cold calling recruitment, DESNZ sample, desk research and existing contacts. The table below shows the breakdown of interview groups and their recruitment methods:

Table 20 Breakdown of Wave 1 interview audience by sub-group, and recruitment method

Audience	Subgroup	Recruitment method
Household	Group 1 – EBSS AFP & EPG on electricity only recipients	Mix of: • Wave 1 online survey respondents (explained in Section A3 of the report) • On-street and cold calling recruitment carried out by an Ipsos recruitment team.
	Group 2 – EBSS AFP & EPG on both electricity and gas recipients	
	Group 3 – EBSS AFP & EPG via pass through or an intermediary (e.g. landlords)	
	Group 4 – EBSS AF & recipients	
Stakeholder	Experts specialising in vulnerable populations	Existing contacts (DESNZ and Ipsos) and desk research

	Delivery Partners	Existing contacts (DESNZ and Ipsos) and desk research
	Wider stakeholders (energy suppliers, scheme administrators and with the Utility Regulator (UREGNI)) All interviews conducted by London Economics	Existing contacts (DESNZ and London Economics) and snowballing (where contacts for future interviews were obtained during the interview)

3.1.2 Wave 2

Wave 2 involved follow up interviews with household participants from Wave 1 and with participants from the Wave 1 and Wave 2 surveys who agreed to be recontacted to take part in a qualitative interview. This approach allowed for longitudinal insights to be developed – in particular how participants' experiences compared between the winter with higher prices but with the support of the domestic energy affordability schemes (2022/23) and the recent winter with lower prices but without the same level of financial support (2023/24). The Wave 2 interviews focused on experiences and perceptions over time and understanding changes over the past year. Stakeholders were recruited through a mix of desk research and through colleagues of the original interviewee where necessary. Fieldwork took place from May 2024 to August 2024. Following the general election being called on 23rd May, DESNZ and Ipsos agreed that fieldwork would be paused until the election was held on 4th July 2024.

The table below shows the breakdown of interview groups and their recruitment methods in more detail.

Table 21 Breakdown of Wave 2 interview audience by sub-group, and recruitment method

Audience	Subgroup	Recruitment method
Household	Group 1 – EBSS AFP & EPG on electricity only recipients	Re-contacts from Wave 1 qualitative interviews, of which there were 24, and the remaining 25 from those who agreed to be re-contacted in their response to an online survey in Wave 1 & Wave 2 main and supplementary surveys.
	Group 2 – EBSS AFP & EPG on both electricity and gas recipients	
	Group 3 – EBSS AFP & EPG via pass through or an intermediary (e.g. landlords)	
	Group 4 – EBSS AF recipients	
Stakeholder	Experts specialising in vulnerable populations	Desk research and recruiting via colleagues of original interviewee where necessary

3.2 Sampling

3.2.1 Wave 1

For Wave 1 household interviews for all four groups the following quotas were achieved.

Table 22 Breakdown of Wave 1 household interviews by sub-group

Subgroup	Method of payment	House Type	Total
Group 1 – EBSS AFP & EPG on electricity only recipients	5 on Monthly / quarterly direct debit 2 Pay by cheque, cash or card on receipt of a bill from your energy supplier 7 on Pre-Payment Meters (PPM)	4 House – detached 4 House – semi detached 1 House – end terrace 2 House – mid terrace 3 Bungalow	14
Group 2 – EBSS AFP & EPG on both electricity and gas recipients	8 on Monthly / quarterly direct debit 1 Pay by cheque, cash or card on receipt of a bill from your energy supplier 9 on PPM (Smart or Traditional)	2 House – detached 5 House – semi – detached 2 House – end terrace 2 House – mid terrace 4 Bungalow 3 Flat	18
Group 3 – EBSS AFP & EPG via pass through or an intermediary (e.g. landlords)	2 - Pay to an intermediary such as a landlord, housing manager or site owner, as part of rent	2 House – semi detached	2
Group 4 – EBSS AF recipients	3 on Monthly / quarterly direct debit 2 Pay by cheque, cash or card 4 Pay to an intermediary such as a landlord, housing manager or site owner, as part of rent	1 Houseboat, 6 Farmhouse, 1 park home, 1 mobile home	9

The interview participants also reflected a range of demographic characteristics.

Table 23 Breakdown of Wave 1 household interview audience by demographics

Demographic	Group 1 – EBSS AFP & EPG on electricity only recipients	Group 2 – EBSS AFP & EPG on both electricity and gas recipients	Group 3 – EBSS AFP & EPG via pass through or an intermediary (e.g. landlords)	Group 4 – EBSS AF recipients
Age	2 – 18-34 8 – 35-54 5 – 55+	2 – 18-34 8 – 35-54 8 – 55+	1 – 18-34 1 – 55+	2 – 35-54 7 – 55+
Income	1 – Under £5,000 2 - £5,000-£9,999 1 - £10,000-£15,999 4 - £20,000-£24,999 2 - £25,000-£29,999 2 - £30,000-£34,999 2 - £50,000-£74,999 1 - £75,000+	2 - £5,000-£9,999 2 - £10,000-£15,999 2 - £16,000-£19,999 6 - £20,000-£24,999 1 - £25,000-£29,999 1 - £35,000-£39,999 1 - £40,000-£44,999 3 - £50,000-£74,999	1 - £5,000-£9,999 1 - £50,000-£74,999	2 - £10,000-£15,999 1 - £16,000-£19,999 1 - £20,000-£24,999 3- £35,000-£39,999 1 - £45,000-£49,999 1 – Don't know
Home ownership	10 – Own (mortgage) 2 – Own (outright) 3 – Rent (private)	7 – Own (mortgage) 4 – Own (outright) 4 – Rent (Northern Ireland Housing Executive) 3 – Rent (housing association/trust)	1 – Own (outright) 1 – Rent (private)	2 – Own (mortgage) 7 – Own (outright)
Employment status	7 – Full-time employment 3 – Part-time employment	8 – Full-time employment 3 – Part-time employment	2 – Full-time employment	4 – Full-time employment 1 – Not working –

	2 – Not in paid employment 1 – Look after home/children 2 – Retired	1 – Not in paid employment 2 – Look after home/children 1 – Carer 3 – Retired		long term sick/disabled 4 – Retired

3.1.2 Wave 2

For Wave 2 household interviews, for all four groups the following quotas were achieved.

Table 24 Breakdown of Wave 2 household interview audience by sub-group

Subgroup	Method of payment	House Type	Total
Group 1 – EBSS AFP & EPG on electricity only recipients	9 on Monthly / quarterly direct debit 2 Pay by cheque, cash or card on receipt of a bill from your energy supplier 6 on PPM (Smart or Traditional)	6 House – detached 5 House – semi – detached 2 House – end terrace 1 House – mid terrace 3 Bungalow	17
Group 2 – EBSS AFP & EPG on both electricity and gas recipients	10 on Monthly / quarterly direct debit 1 Pay by cheque, cash or card on receipt of a bill from your energy supplier 8 on PPM (Smart or Traditional) 1 Did not say	3 House – detached 7 House – semi – detached 1 House – end terrace 3 House – mid terrace 3 Bungalow 3 Did not say	20
Group 3 – EBSS AFP & EPG via pass through or an intermediary (e.g. landlords)	1 - Pay to an intermediary such as a landlord, housing manager or site owner, as part of rent	1 House – semi – detached	1
Group 4 – EBSS AF recipients	2 on Monthly / quarterly direct debit 3 Pay by cheque, cash or card	1 Houseboat, 7 Farmhouse, 1 Heat network (bungalow) 1 park home,	11

	6 Pay to an intermediary such as a landlord, housing manager or site owner, as part of rent	1 mobile home	

Interview participants also included a mix of demographic characteristics.

Table 25 Breakdown of Wave 2 household interview audience by demographic characteristics

Demographic	Group 1 – EBSS AFP & EPG on electricity only recipients	Group 2 – EBSS AFP & EPG on both electricity and gas recipients	Group 3 – EBSS AFP & EPG via pass through or an intermediary (e.g. landlords)	Group 4 – EBSS AF recipients
Age	3 – 18-34 11 – 35-54 3 – 55+	1 – 18-34 14 – 35-54 2 – 55+ 3 – Didn't answer	1 – 18-34	2 – 35-54 9 – 55+
Income	2 – Under £5,000 2 - £5,000-£9,999 1 - £10,000-£15,999 1 - £20,000-£24,999 1 - £25,000-£29,999 2 - £30,000-£34,999 1 - £40,000-£44,999 3 - £50,000-£74,999 3 - £75,000+ 1 – Don't know	1 – Under £5,000 2 - £5,000-£9,999 2 - £10,000-£15,999 2 - £16,000-£19,999 3 - £20,000-£24,999 2 - £35,000-£39,999 1 - £40,000-£44,999 3 - £45,000-£49,999 3 - £50,000-£74,999 1 – Didn't answer	1 - £50,000-£74,999	3 - £10,000-£15,999 1 - £16,000-£19,999 1 - £20,000-£24,999 2 - £35,000-£39,999 1 - £40,000-£44,999 1 - £45,000-£49,999 2 – Did not say
Home ownership	8 – Own (mortgage) 5 – Own (outright) 4 – Rent (private)	9 – Own (mortgage) 3 – Own (outright)	1 – Rent (private)	2 – Own (mortgage) 8 – Own (outright) 1 – Rent (private)

		3 – Rent (Northern Ireland Housing Executive) 1 – Rent (housing association/trust) 1 – Rent (private) 3 – Didn't answer		
Employment status	14 – Full-time employment 2 – Part-time employment 1 – Not working – long term sick/disabled	13 – Full-time employment 1 – Not in paid employment 2 – Look after home/children 1 – Retired 3 – Didn't answer	1 – Full-time employment	5 – Full-time employment 1 – Not working – long term sick/disabled 5 – Retired

3.3 Focus of interviews

Wave 1 interviews and Wave 2 interviews focused on slightly different areas, with some overlap to draw comparisons across both waves. The topics guides used are shown in Appendix 1.

3.3.1 Wave 1

These interviews focused on the following areas:

Table 26 Wave 1 household Interviews themes

Household interviews	Stakeholder interviews
Awareness and experience of the schemes before and after they started Experience paying energy bills and cases of underconsumption Views on communication about the schemes Views on the schemes' financial support	Context before schemes were announced Overall perceptions of the schemes Awareness and understanding of the schemes Accessibility of the schemes Impact and experience of the schemes Lessons learned

Table 27 Wave 1 Interview themes for stakeholders

Energy supplier, scheme administrators and UREGNI interviews
Implementation and delivery
Information and communication
Costs
Retail distortions, risk and insolvency
Fraud and scams (Applied to Utility Regulator Topic Guides only)
Supplier behaviour (Applied to Single Electricity Market Operator Topic Guides only)
Balancing and settlement (Applied to Single Electricity Market Operator Topic Guides only)
Consumer debt and insolvency (Applied to suppliers only)
Overall perceptions and resources
Lessons learned

3.3.2 Wave 2

The Wave 2 interviews focused on experiences and perceptions over time and understanding changes over the past year. These interviews focused on the following areas:

Table 28 Wave 2 Interview theme

Household interviews	Stakeholder interviews
Feelings about energy bills over time	Context before schemes were announced
Experience over time	Perceptions over time
Household behaviours and health over time	Experiences of consumers over time
Perceptions over time	Household finances and other support

3.4 Data collection

3.4.1 Wave 1

In Wave 1, Ipsos conducted a total of 44 household interviews and 7 stakeholder interviews. London Economics conducted 7 interviews with energy suppliers, scheme administrators and UREGNI.

Tables 29 and 30 show the breakdown of interviews by number and sub-group.

Table 29 Breakdown of Wave 1 interviews by audience and sub-group.

Audience	Subgroup	Number of interviews
Household	Group 1 – EBSS AFP & EPG with electricity only recipients	15
	Group 2 – EBSS AFP & EPG with both electricity and gas recipients	18
	Group 3 – EBSS AFP & EPG via pass through or an intermediary (e.g. landlords)	2
	Group 4 – EBSS AF & recipients	9
Stakeholder	Experts specialising in vulnerable populations	5
	Delivery Partners	2

Table 30 Breakdown of Wave 1 interviews by sub-group of interviews

Audience	Number of interviews
Energy suppliers	4
Scheme administrators: Northern Ireland Electricity Network (NIEN) and Single Electricity Market Operator (SEMO)	2
UREGNI	1

3.4.2 Wave 2

In Wave 2, Ipsos conducted a total of 49 household interviews and 4 stakeholder interviews. Table 31 shows the breakdown of interviews by sub-group:

Table 31 Breakdown of Wave 2 interview audience by sub-group and number of interviews

Audience	Subgroup	Number of interviews
Household	Group 1 – EBSS AFP & EPG on electricity only recipients	12
	Group 2 – EBSS AFP & EPG on both electricity and gas recipients	25
	Group 3 – EBSS AFP & EPG via pass through or an intermediary (e.g. landlords)	1
	Group 4 – EBSS AF recipients	11
Stakeholder	Experts specialising in vulnerable populations	4

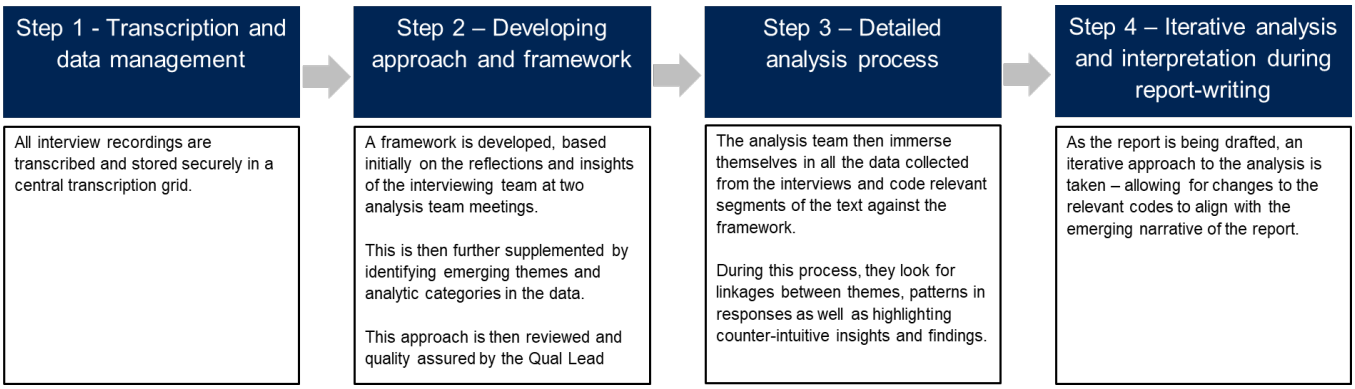
Incentives for Wave 1 and 2

A £40 incentive was offered upon completion of household qualitative interviews to encourage participation. At the end of the interview, respondents could choose to receive a Love2shop voucher or a BACS transfer. Those who provided their email address received an e-voucher, while those who did not have an email address, or preferred not to provide an email address, received a paper postal voucher redeemable online at the Love2Shop website.

3.5 Qualitative analysis

The Ipsos team took a thematic approach to the analysis of both waves of research – where the data from the interviews was used to identify and analyse recurring themes, patterns and concepts. This allowed the team to immerse themselves in the data, improving their understanding of the data as a whole, how it related to each other – and ultimately ensuring they were better able to identify nuanced themes, patterns and concepts. The flexibility of this approach ensured the structure of the discussion guide could be used as the coding framework, while allowing analysis to continue iteratively while the report was being drafted. During the second wave of the research, it also allowed for reflections back to the data from Wave 1 interviews to be incorporated. This is outlined in the four-step process below.

Figure 2 Qualitative analysis process



Other analytical approaches were considered, such as narrative analysis, which focusses on analysing the stories and narratives participants shared about their experiences with the energy schemes, or discourse analysis, which examines the language participants used to understand how they construct their experiences and perspectives. Neither of these approaches would allow the team to immerse themselves in the transcripts (making the identification of themes, patterns and concepts more difficult and less coherent), and neither would effectively nor efficiently answer the evaluation questions; therefore these approaches were not used.

3.6 Limitations

As with any evaluation approach, there were some limitations in the delivery of the qualitative interviews. These are summarised below:

Recall: Depth interviews with households, energy suppliers and other stakeholders were conducted a considerable time after winter 22/23 and winter 23/24. While the discussion guides were drafted in a way that gave interviewees time to reflect back; and topics were shared in advance with stakeholders, allowing them to discuss internally and collect relevant information, participants may still have struggled to remember what happened during these periods, particularly around issues like the application process. There is also the risk that participants (particularly households) may have conflated their experiences, concerns and decisions across both winters.

Reaching non-applicant audiences: Planned qualitative research with AF non-applicants (who would have been eligible for the scheme, but did not apply) could not be completed. Initially there were challenges around identifying the households and ways to contact them. For those we had identified, we found response rates, in the time available for research, were incredibly low. Although we tried using multiple methods of communication (email, phone, leaving voicemails, reaching out through community and wider organisations), we were unable to conduct any interviews with these groups. This was further impacted by the General Election (see below).

Impact of General Election and school holidays: During Wave 2 fieldwork, a General Election was called for 4th July 2024. As with most Government research and evaluation projects, this meant fieldwork could not take place in the pre-election period. In practical terms, this meant

fieldwork had to pause and remaining stakeholder interviews would have to take place following the General Election (when stakeholders, often in policy roles, would be busy trying to understand the implications of the new Government for their organisation). This resulted in a short window between the election being held and school holidays beginning, where availability is typically significantly more restricted. This impacted the eventual number of stakeholder interviews that were conducted.

Annex A4 Secondary data sources

As part of the evaluation, alongside programme and scheme-level monitoring data, secondary data was reviewed and analysed to inform the team's understanding of the NI energy market context and also to inform the contextual aspects of the contribution analysis. The following sources were reviewed as part of this research:

- Consumer Council Northern Ireland, Home Energy Index (July 2024)
- Department for Communities and Northern Ireland Statistics and Research Agency, Family Resources Survey Northern Ireland (2021-2022)
- Department for Communities and Northern Ireland Statistics and Research Agency, Northern Ireland Poverty and Income Inequality Report (2023)
- Department for the Economy, Energy Strategy for Northern Ireland (2021)
- Department of Finance, Housing Stock Statistics (2023 and 2024)
- DESNZ, Public Attitudes Tracker (2022 and 2023)
- DESNZ, National Energy Efficiency Data-Framework
- DESNZ, Sub-national electricity consumption statistics (2023)
- DESNZ ,Total Final Energy Consumption (2021)
- DESNZ, Warm Home Discount Statistics (2022-2023)
- Ministry of Housing, Communities and Local Government, Energy Performance Certificate Building Register
- Office for National Statistics, Living Costs and Food Survey
- National Institute of Economic and Social Research, UK Economic Outlook
- Northern Ireland Housing Executive, Building Research Establishment, Estimates of fuel poverty in Northern Ireland in 2020 and 2021
- Northern Ireland Housing Executive, Northern Ireland House Condition Survey 2016
- Northern Ireland Statistics Research Agency, Census 2021

In addition, as part of the analysis of the contribution claim regarding energy supplier solvency, the evaluation reviewed the financial accounts of the energy suppliers active in NI during the period when the schemes were implemented. These energy suppliers were:

- Budget Energy
- Click Energy
- Electric Ireland
- Firmus Energy
- Power NI
- SEE Airtricity.

Appendices

Appendix 1 Topic Guides

Appendix 2 Survey questionnaires (see separate files on evaluation webpage)

Appendix 3 Survey Tables (see separate files on evaluation webpage)

Appendix 1 Topic Guides

NI Evaluation: Household Discussion Guide (EBSS AFP)

Background:

The Department for Energy Security and Net Zero (DESNZ) has commissioned Ipsos UK to conduct qualitative research to understand the impact of various Government schemes and actions intended to help people with the cost of energy.

The topic guide covers the following:

- Introduction including confidentiality;
- Experience before the schemes began;
- Communications;
- Perceptions; and
- Summing up (including arrangements for incentive payment).

Interviewer information:

- Fieldwork period is November and December 2023.
- 50 participants will be interviewed in total.
- Participants will be given £40 as a thank you for participating in an interview.
- The interview will be 45 to 60 minutes
- Interviews will be conducted over the phone or via MS Teams at a time arranged with the participant and interviewer.
- With participant's permission, the interviews will be recorded, and interviewer notes will be added to the analysis grid as soon as possible after each interview is completed. This is required to support on-going and timely client feedback.
- 'PROBE:' references are to be used if needed (i.e., if a participant is struggling to answer or has misunderstood the question). They do not need to be asked.
- Unless stated otherwise all questions in a section should be answered.

1. CHECKLIST (SCHEMES, ENERGY SUPPLIER RELATIONSHIP) Taken from respondent profile sheet	
Scheme(s) accessed / eligible for:	
A: Energy Bills Support Scheme (EBSS) and Alternative Fuel Payment (AFP)	
B: Energy Price Guarantee (EPG)	
Respondent Group:	
1: EBSS AFP and EPG	
Relationship with energy supplier(s)	
Direct i.e., respondent solely or jointly pays energy bills	
Indirect e.g., via landlord	
Method of payment	
Monthly / quarterly direct debit (where your energy supplier takes the same amount of money from your bank account automatically)	
Pay by cheque, cash or card on receipt of a bill from your energy supplier	
Keypad Prepayment meter, where you top up credit onto a key or card	
Keypad Prepayment meter, where you top up credit online or using a mobile app	
Pay to an intermediary such as a landlord, housing manager or site owner, as part of rent	
Pay in another way (please specify)	
Location	
Rural	
Urban	
Type of Home Heating	
	Central heating
1	Gas
2	Oil
3	Solid fuel – coal

4	Solid fuel – biomass (for example wood)
	Fixed room heaters, fires and stoves
5	Electric (storage)
6	Natural Gas
7	Electric (not storage)
8	Solid fuel (open fire/enclosed stove) – coal
9	Solid fuel (open fire/enclosed stove) – wood
10	LPG (liquefied petroleum gas)
	Portable heaters
11	Electric
12	Other portable heater
	Other
13	Communal or district heating (heat networks)
14	Heat pump
15	Something else (please specify) [FIX]

2. Introduction	2-3 mins
Thank participant for taking part. Introduce self and explain nature of interview: Informal conversation; all opinions valid, no right or wrong answers. Interviews should take around 45 minutes. Introduce research and topic – The Department for Energy Security and Net Zero (DESNZ) has commissioned Ipsos to conduct research among a cross section of people in NI to help it understand the impact of various Government schemes and actions intended to help people with the cost of energy. Role of Ipsos – Independent research organisation (i.e., independent of government); we adhere to the MRS Code of Conduct.	Orientates interviewee, prepares them to take part in the interview. Outlines the 'rules' of the interview (including those we are required to tell them under MRS and GDPR guidelines).

Confidentiality – Reassure all responses anonymous and that identifiable information about them will not be passed on to anyone, including back to DESNZ or any other Government department. Reassure them that participation will have no impact on the energy support they receive or any dealings with their energy suppliers, landlords etc. now or in the future. Voluntary participation / consent – Check that they are happy to take part in the interview and remind them that participation is voluntary. They can withdraw from the research at any point before, during or after the interview. GDPR conditions – Ipsos requires a legal basis to process your personal data. Ipsos' legal basis for processing your data is your consent to take part. For more information, see the information sheet shared with you in advance of the interview. Ask for permission to digitally record when recording starts – Ipsos's legal basis for processing your data is your consent to take part in this research. Your participation in this research it is voluntary. You can withdraw your consent for your data to be used at any point before, during or after the interview (up until the end of November – after this time, the data would have been analysed and cannot be removed). Are you happy to continue? We may also share the recording with our transcription partner, Take Note, to transcribe the interviews for us. Would this be ok with you? Any questions before we begin?	

3. Experience before the schemes began	14 mins
Introduction / overview of the schemes. Read out: The Energy Bills Support Scheme (EBSS) and Alternative Fuel Payment (AFP): was a £600 one-off payment to help with energy bills. The payment consisted of £400 from the Energy Bill Support Scheme (EBSS) and £200 from the Alternative Fuel Payment (AFP). Households who paid their energy bill by direct debit, had the payment deposited into their bank account automatically between 16th January and 28th February 2023. Households that did not pay their energy supplier via Direct Debit (i.e., if household paid for electricity through a top up card, app or by cash or cheque on receipt of energy bill) were paid through a voucher delivered between 16th January and 28th February 2023 that could be redeemed at the Post Office. The Energy Price Guarantee, applied a discount to the unit cost of gas and electricity for households (these discounts were projected to result in an average NI bill of £2,109 per annum, for those with both electricity and gas) from November 2022 to 1st July 2023. Do you remember hearing that government support was going to be provided to most householders in NI? Read Out: In this part of the interview we would like to understand a bit about your energy use and household bills before this government support was introduced Could you tell me a bit about your household and your energy use prior to the announcement of government support to reduce household energy bills, (i.e. prior to November 2022)? PROBE: how easy or difficult was it to pay your energy bills in September and October 2022? At this time did you take any measures to reduce the level of energy you used, due to the rising costs of energy? (e.g. turned the heating off in some rooms, stopped using the tumble dryer etc.). Do you recall how you were feeling in Autumn last year about paying your energy bills over the coming winter (from November 2022 to February 2023)? Probe if needed: Were you concerned that you would not be able to heat your home to a comfortable level (over the coming winter)? Or were you not able to heat your home to a comfortable level during this time? Were you concerned or did you cut down on other household essentials? Did you / or did you think you would have to make any lifestyle changes to continue to pay for your energy bills? (e.g. cut down on little luxuries, such as gym membership or eating out) Before the government support was announced did you think you would have to borrow money to pay for household essentials (such as energy bills and food)? Or had you already borrowed money?	

Did your household savings or, borrowing habits change as a result of the increase costs of energy? E.g. did you have to stop any regular savings because of the cost of energy or, did you have to 'dip into' savings to pay for energy? Were your energy bill in arrears prior to September 2022? i.e. before the greatest hikes in energy costs? During September, October, November 2022, did you make any changes to your shopping habits (e.g. changed to supermarket own brands or changed where you shop) due to rising energy costs? Did the rising energy costs cause you any stress or anxiety? If so, how worried were you about your energy bills? E.g. Did this cause you stress of anxiety? Lack of sleep etc. When you found out that government support was being provided did this reduce your level of concern/worry about energy bills? Probe – if so, did you do anything when you heard you were getting support – e.g. revert back to previous levels of energy use or, not have to borrow money?	
Awareness	
I would like to ask you a few questions now about your awareness of the government support. As I mentioned before, Government introduced the Energy Price Guarantee in November 2022, which reduced the unit costs of electricity and gas in NI. This ran between November 2022 and June 2023. In addition to this, under the Energy Bills Support Scheme Alternative Fuel Payment, £600 was issued to eligible households between February and March 2023. Do you recall receiving support from any of these schemes? Probe: Both the £600 and the reduction in energy costs per unit? Do you remember how you found out about these schemes and what information did you receive? Probe: TV, radio, friends or family. Was it clear to you that the government was supporting a discount on gas and electricity and without that support your bills would have been even higher? How easy or difficult was it to understand the impact of EPG on your energy bills? If NOT AWARE OR NOT CLEAR, Probe: how would you have liked to be made aware of the EPG scheme? What information would have been most useful, or what part of it was not clear? Did you know that most households in NI would also be entitled to a one-off payment of £600 as well as the discount on unit costs of energy?	

4. Experience once the schemes began	15 mins
Ask all. I'd now like to ask you some questions about your energy use and household bills during the time when the government schemes were in place, i.e. from November 2022 to June 2023. Thinking back, how did you feel when you received your first bill of the winter (i.e. it probably would have been around November 2022 to March 2023)? PROBE: Was this first bill that winter, what you had expected (more or, less expensive)? Was it clear to you that the government supported discounts had been applied? How easy or difficult was it for you to afford your energy bills last winter? How did this compare to previous quarters or months? How did this compare to previous years? Did you have to make changes to your lifestyle to be able to afford your energy bills at this time? PROBES: Were you concerned about finances in general because of the cost of energy during this time? Household saving and borrowing: Over the winter of 2022/23 did your household savings and/or borrowing vary at all? e.g. did you have to stop saving or did you have to borrow money because of the increase in energy costs? Did this change at all because of the government support? If so how?, Probe if needed: How did this differ from before the interventions began and from the equivalent period the year before i.e.2021/2020? E.g. never had to borrow money before, or was able to save in previous years. Were you in arrears at all during the winter of 2022/23? If so, had you ever been in arrears before? If not, did the support from government prevent you going into arrears at all? IMPACTS Did the size of your bill impact on how you used energy? If yes, what did you do? E.g.. turned thermostat down, didn't heat some rooms etc To what extent were you able to heat your home to a comfortable level last winter? PROBE, IF NOT: Did this have any consequences to your health or your home? E.g. Did the lack of heat have an impact on pre-existing health conditions (e.g., asthma COPD) Did the lack of heat impact on the condition of the house? (e.g., damp or mould appearing that had not previously been there). Did receiving the £600 payment from government help to alleviate any of these issues? Ask all	

Thinking of energy use apart from heating, did energy prices impact on other aspects of your lives during November 2022 to February 2023 January 2023 – February 2023? For example, were you able to live comfortably e.g., washing and drying clothes, cooking hot meals, having lights on when you wanted? If not, what were you not able to do that you would have done otherwise, e.g., use a tumble dryer, electric heaters etc.? Ask all Did you take any measures to reduce your energy consumption? If Yes PROBE: For example, turn the heating off in some rooms of your house, turn your thermostat down, reduce the amount of time that you had your heating on? What did you feel about the timing of the support that you had received? e.g. Did you receive the payment within a timeframe that meant you didn't have to reduce your energy usage to an uncomfortable level or have to make other sacrifices because of your energy costs? Did you experience any delays in receiving the payment? If yes, has this negatively impacted your household? How did it negatively impact? If no. If you had known that you would be entitled to this one-off payment would this have affected your energy use? If yes, PROBE: How, if at all, did this influence your energy use? What did you use the one-off £600 payment for? Household energy (e.g. the gas meter or filling the oil tank) Other household essentials (food, clothing etc.) Did you use it straight away or at a later time? To what extent would you have been able to afford these things with the £600 payment? Were you expecting it? If not, why not? Were you suspicious of the one-off payment or hesitant to use it? What did you think about receiving the one-off lump sum payment of £600 bank transfer as supposed to another amount or not as a lump sum? INTERVIEWER PROBE: Should it be different amount spread out over the winter to your energy bills, or in any other way? Views on the Vouchers: ASK participants who did NOT have a Direct Debit payment arrangement. Did you receive a £600 voucher? Were you aware that you could redeem the voucher between 16th January and 30th June 2023 at the Post Office?	

Did you redeem it right away? If not – why not? Probe if delayed to redeeming voucher or not redeemed at all. Did you redeem as cash or deposit it into your bank? Were you suspicious of the voucher or hesitant to use it? How easy was it for you to redeem your voucher? (e.g. was the PO accessible, were you able to provide the required ID etc.).	

4a Disconnection	5 mins (if required)
Ask all Were you disconnected from your energy supply or home heating at any time during the winter of 2022/23 (e.g., because you could not top-up the meter or ran out of Home Heating Oil ? If you are comfortable, can you talk me through this experience and how you felt? PROBE: How long were you without energy/heating for? Was this deliberate (e.g., you felt that you could not afford to top up) or accidental (e.g., you didn't realise it needed to be topped up)? Did it impact on you or other household members? (e.g. make any pre-existing health conditions worse, increased anxiety, made the house damp). If you ran out of Home Heating Oil: Were you unable to afford to re-fill your tank or, were unable to get a delivery within a reasonable timescales?.	

5. Communications	5 mins
Do you think that you received enough information about the scheme? e.g. the impact of the EPG on your energy bills or when your EBSS, AFP payment would arrive? If not what additional information would you have liked? Who do you think should have provided this information (e.g. your supplier, government?) If you had, had more information do you think it would have changed how you used energy / how much you used?	

6. Perceptions of the support provided	10 mins
ASK All Overall, did you feel the Government support made a real or noticeable difference to you or your household's ability to: use the energy you needed? stay on top of energy costs? Do you have any views on how the support was provided? PROBE: For all Energy Bills Support and Alternative Fuel Payment schemes did you think one lump sum payment was useful or, do you think it should have been provided in 2 or 3 batches? What are your views on the universal model adopted vs more means tested approaches to supporting households? PROBE: To what extent do you feel universal support was the right approach? If no: How do you think the approach could have been changed? If a targeted approach is preferred: what criteria do think would have been suitable to base the targeting on? E.g. how would households who need additional support be identified. To what extent did you feel the financial support provided was sufficient? Ask those who went into debt or reported negative health and well-being impacts – how much support would have been required to prevent this. PROBE: Was there any other forms of non-financial support that would have been helpful? (e.g. additional insulation to your home, energy use advice, debt advice?) The government support meant that on average household energy bills in NI were around £2109 for 2022/23. Imagine that your energy bills had been even more expensive due to cost-of-living and energy crisis during the winter 2022/23. How do you think you would have managed this? PROBE: Do you think you would have been able to use the energy you needed to stay warm during this time? In the absence of the interventions, what do you think your household's estimated energy consumption and expenditure would have been? Why? – e.g. would you have had to reduce your energy consumption?	

How does this compare to your actual consumption and expenditure over the course of the interventions? What, if any, positive behaviour change did the increase in energy prices prompt and to what degree was this prolonged? For example turning off lights when not needed or not leaving devices on stand-by, installed additional insulation or energy efficient devices?	

7. Summing up	2-3 mins
We are coming to the end of the interview, but I have a few final questions before we finish. All Do you have any final comments you would like to make about the government support provided for energy bills? Thank and reiterate confidentiality. Incentives = £40 bank transfer or Love2Shop voucher as a 'thank you' from Ipsos for their time and contribution. Signpost for further information (referencing the information sheet) / if any concerns about discussion.	Brings the conversation to a close and allows participants time to mention anything that has not already been covered.

Recontact Questions (TBC)	
Ipsos UK will be conducting further research on this topic in the next 12 months. Would you be happy for Ipsos UK to retain your contact details in order to invite you to take part in further research on this topic in the next 12 months? You do not have to say now whether you would actually take part in the research, just whether you would be happy to be contacted about it. If you are happy to be recontacted and you complete any further surveys or interviews, we would offer High Street Vouchers to thank you for your time. SINGLE CODE	

1	Yes - happy for Ipsos UK to contact me
2	No
998.	Don't know [FIX]

ASK ALL WHO SAY THEY ARE HAPPY TO BE RE-CONTACTED (I14 = 1)

EMAIL ADDRESS/TELEPHONE NUMBER

I16. For Ipsos UK to re-contact you to take part in future research, please could you provide an email address and/or a telephone number to be re-contacted?

Please type your response in the below text boxes

TEXT BOX

NAME / EMAIL ADDRESS / TELEPHONE NUMBER[INSERT VALID EMAIL / TELEPHONE CHECKS]

Check appropriate format for email address or tick box Prefer not to provide email address

Check appropriate format for telephone number or tick box Prefer not to provide telephone number

If participant doesn't provide name and one of email address or telephone number, please bring up text box saying 'So that we can contact you, we need to know your name and either your email address or telephone number'.

I17. DESNZ may also undertake further research relating to household energy costs and government support. Would you be willing to be contacted by Department of Energy, Security and Net Zero (DESNZ) about this in the future?

If you agree, Ipsos will share the contact details you have already provided.

SCRIPTER INSERT FROM ABOVE

Enter name
Enter email address

OR

Enter name
Enter address

Do you consent to us passing these details to Department of Energy, Security and Net Zero (DESNZ), solely for the purpose of further research?

You may be contacted about this further research at some point in 2024. Please indicate your preference below.

Yes, I am happy for my details to be passed on to Department of Energy, Security and Net Zero (DESNZ), solely for the purpose of further research	1
No, do not pass my details on to DESNZ	2

NI Evaluation: Advocacy Groups/ Experts on Vulnerable Households Topic Guide

Background:

The Department for Energy Security and Net Zero (DESNZ) has commissioned Ipsos to conduct qualitative research to understand the impact of the Domestic Energy Affordability Support Schemes in Northern Ireland. DESNZ is particularly interested in the experiences of vulnerable customers. To help with this we are speaking to experts from organisations with insights into the experiences of relevant groups of people. This topic guide is designed to facilitate a conversation with relevant executives working within some of these organisations.

Interviewer information:

- Fieldwork period MM 2023.
- 5 x 2 'Experts in Vulnerable Households participants will be interviewed.
- 45-minute interview.
- Interviews will be conducted via MS Teams in the first instance, and on the phone if that is not possible, at a time arranged with the participant and interviewer.
- With participant's permission the interviews will be recorded, and notes should be added to the analysis grid as soon as possible after each interview is completed. This is required to support ongoing and timely client feedback.
- 'PROBE:' references are to be used if needed (i.e., if a participant is struggling to answer or has misunderstood the question). They do not need to be asked.
- Unless stated otherwise all questions in a section should be answered.

1. Introduction	3 mins
Thank participant for taking part. Introduce self and explain nature of interview: informal conversation; all opinions valid, no right or wrong answers. Interviews should take around 45 minutes. Role of Ipsos – Ipsos, in partnership with London Economics and have been commissioned by the Department for Energy Security and Net Zero to complete an interim evaluation of the Domestic Energy Affordability Support Schemes in Northern Ireland. Ipsos are an independent research organisation (i.e., independent of government) and adhere to the MRS Code of Conduct. Introduce research and topic – The main purpose of the interviews is to gather information on overall perceptions of and experiences with the schemes, the extent to which the schemes were accessible and the overall impacts they had on the people you work with / represent. This discussion will focus on your experience and insights into the impact of the schemes on vulnerable groups in Northern Ireland, particularly those who have been most severely impacted by high energy prices. Confidentiality – explain that we will name organisations taking part in the research in the report, but that quotes won't be attributable to them or their organisation. Voluntary participation / consent – check that they are happy to take part in the interview and remind them that participation is voluntary. They can withdraw from the research at any point before, during or after the interview. GDPR conditions – Ipsos requires a legal basis to process your personal data. Ipsos' legal basis for processing your data is your consent to take part. For more information, see the information sheet shared with you in advance of the interview. Ask for permission to digitally record – when recording starts. Ipsos's legal basis for processing your data is your consent to take part in this research. Your participation in this research it is voluntary. You can withdraw your consent for your data to be used at any point before, during or after the interview (up until the end of June. After this time, the data will have been analysed and cannot be removed). Are you happy to continue? Any questions before we begin?	Orientates interviewee, prepares them to take part in the interview. Outlines the 'rules' of the interview (including those we are required to tell them under MRS and GDPR guidelines).

2. Background and role	5 mins
Can you tell me a little bit about your role at (organisation) and how it relates to energy affordability and/or fuel poverty in Northern Ireland? PROBE: - What type of consumer groups do you typically work with? - What type / range of services do you provide? This interview will cover the following schemes and, unless specifically stated, the questions will cover all schemes. Energy Price Guarantee (EPG): This was launched in NI in November 2022, and lowered the unit price households paid for electricity and gas by setting a discount rate on unit prices (although it was not a cap on customers' total bills, which depended on usage). The discount rate was based on the regulated tariffs (i.e., those regulated by the NI energy regulator) and calculated/amended to keep a 'typical' bill at the same level. There was also a 5-month increase in the discount when it was first implemented in NI to compensate for its delayed start compared to the rest of the UK. The Energy Bill Support Scheme and Alternative Fuel Payment (EBSS AFP NI): Households in NI received a single £600 non-repayable payment to help with their energy bills over winter 22/23. All households with a domestic meter and electricity contract were eligible for the payment, this was given as a universal payment and the payment was delivered automatically to customers via electricity suppliers. This was either made directly into bank accounts (if customers had a direct debit set up) or through cashable vouchers. In GB, these two schemes were delivered separately (as £400 EBSS and £200 AFP). Only those who use alternative fuels were eligible for AFP in addition to EBSS (to compensate for a reduced amount of EPG discount). In NI, due to the majority of households using an alternative to gas, it was given as a universal payment. EBSS Alternative Funding (AF) NI: Households without a domestic electricity meter and connection were able to apply for a single payment of £600 through the AF scheme. It was designed to reach households in special circumstances, including: - Care home residents and others in care facilities / sheltered accommodation - Park home residents, houseboats and caravans that can provide proof of address - Social and private tenants who pay for energy through a landlord on a non-domestic supply - Homes on a heat network / private wire	Orientation, helps establish the focus of the interview

- Off-grid homes - Farmhouses used for wholly domestic purposes Please could you give me a brief overview of how you have used or come into contact with the support schemes in Northern Ireland as part of your role? PROBE: Which of the NI schemes are you most familiar with?	
3. Context before schemes were announced	
How was the level of concern about energy bills amongst… (relevant group the organisation can provide insight on) before the schemes were announced? **How was the level of concern about energy bills amongst… (relevant group the organisation can provide insight on) before the schemes were announced?** **And were you aware of cases of underconsumption among the people you work with/represent, where they are using less energy than would have been healthy before the schemes were announced?**	

4. Overall perceptions	7 mins
Taken as a whole, what are your views on the support provided by Government to help households in Northern Ireland with the rise in energy bills? **Do you have any thoughts on how it has been implemented?** PROBE: For any thoughts on differences/similarities on implementation of the individual NI schemes **What are your views on the universal model adopted vs more means tested approaches?** PROBE: To what extent do you feel universal support was the right approach? If no: How do you think the approach could have been changed? If a targeted approach is preferred: what criteria do think would have been suitable to base the targeting on?	

5. Awareness and understanding	15 mins
In your view, thinking about EPG; EBSS AFP NI and AF – what were the levels of awareness of each of these three schemes amongst the consumer groups you typically work with? Interviewer note: probe how, if at all, awareness differed across each of the three schemes, including why. PROBE: Where did (relevant group the organisation can provide insight on) get information about the schemes? **Do you think that those who were most in need of additional support were aware of the schemes? If not what additional actions could have been taken to raise awareness?** PROBE: What impact, if any, did levels of awareness have on those households that did not have a domestic electricity connection, who had to apply for AF? And what about those households that had to redeem vouchers at the Post Office? (Ask for EBSS AFP) **And in your view, what were the levels of awareness of the deadline for redeeming vouchers?** **In your view, how well understood do you think the schemes were among… (relevant group the organisation can provide insight on)?** Interviewer note: listen out and probe for how easy / difficult information on the schemes was perceived to be **To what extent, if at all, do you think people were provided adequate information about the schemes?** How was information provided to Households? PROBE: communication channels; Stakeholder engagement etc PROBE: What, if anything, do you think was good about the information provided? PROBE: What, if anything, do you think could have been improved about the information provided? **How well do you think people understood what energy prices would have been like without the Energy Price Guarantee?** Interviewer note: listen and probe for awareness and understanding of this compared to the EBSS AFP payments.	

6. Accessibility of the schemes	7 mins
I'd now like to focus specifically on the EBSS AFP NI Alternative Funding, where people without a direct relationship with a domestic energy supplier were required to apply directly for the support. As a reminder…. Households without a direct relationship with a domestic energy supplier were invited to apply for the combined Alternative Fuel Payments and Alternative Funding scheme. This opened applications for a direct payment of £600 in February 2023 from households in special circumstances, including - Care home residents and others in care facilities / sheltered accommodation - Park home residents, houseboats and caravans that can provide proof of address - Social and private tenants who pay for energy through a landlord on a non-domestic supply - Homes on a heat network / private wire - Off-grid homes - Farmhouses used for wholly domestic purposes **From your experience, were eligible people among (relevant group the organisation can provide insight on) aware they could apply to receive this support?** PROBE: Were there any particularly successful targeted communications? Were there any groups of people/households who have less aware of the support thar was available? **Do you have any views/ insights on the overall application process?** **And did those eligible understand the application they needed to complete?** PROBE: Were there any parts of the scheme you were often asked to explain or support with by individuals? If yes, please explain what the common confusion was or area where individuals needed support. **Were you aware of anyone / any groups who had difficulty accessing the AF and receiving this support?** If so, what specific groups of people had difficulties? What issues, if any, did they face with accessing the schemes? What issues, if any, did they face with the application process for the schemes? PROBE: Was the telephone application option useful? **How could schemes be improved to support to hard-to-reach groups be better designed in future?** Focusing briefly now on the EBSS AFP NI scheme.	

As a reminder, all households with a domestic meter and electricity contract were eligible for the £600 payment and the payment was delivered automatically to customers via electricity suppliers or via vouchers that were redeemable at the Post Office. **Thinking about EBSS AFP NI: what issues, if any, were you aware of regarding access to the £600 voucher or direct payment from the schemes?** PROBE: Do you have any knowledge of potentially eligible people not receiving the one off £600 vouchers? Please describe what happened, any challenges people faced as a result, and if/how the issue was resolved. **Where you aware of any issues that householders may have faced when cashing their vouchers at the Post Office?** How could these issues have been resolved?	

7. Impact & experience of the schemes	7 mins
Based on information you've gathered or any anecdotal evidence you have, what difference did these schemes make to… (relevant group the organisation can provide insight on)? PROBE: Were they able to heat their home to a comfortable level? Were they able to avoid damp/mould in their properties? Did they go into debt or, avoid debt? Interviewer note: make sure it is clear for the transcript where the information has come from. **How did the level of concern about energy bills amongst… (relevant group the organisation can provide insight on) vary:** **During the time the schemes were live? (e.g. did the introduction of the EPG relieve some of the concern around energy affordability?)** After the schemes had closed – and their level of awareness of it closing? **Were you aware of cases of underconsumption among the people you work with/represent, where they are using less energy than would have been healthy:** During the time the schemes were live? PROBE: For which individuals among (relevant group the organisation can provide insight on) was this more common? **What sort of evidence would you expect to see from the evaluation to determine if the schemes had an impact (or not)?** Probe:	

For example evidence that households did not reduce the heating of their house to unhealthy levels? Householders avoided or reduced the potential levels of debt / arrears? Would you expect to see different outcomes for different population groups (if so, please explain). **Are you aware of any sources of data that we should examine, alongside the primary data collection, that would be helpful for the evaluation?** PROBE: fuel poverty, house conditions, health / excess winter deaths etc. **Are you aware of any unintended consequences these schemes may have had on individuals and their households?**	

8. Summing up & lessons learned	2-3 mins
We are coming to the end of the interview, but I have a few final questions before we finish. **From (organisation name's) perspective, what is the biggest lesson the Government can take from the implementation of these three schemes?** **Is there anything you've discussed today that you would not want us to include in our report?** THANK AND CLOSE	Brings the conversation to a close and allows participants time to mention anything that has not already been covered.

This publication is available from: www.gov.uk/government/publications/domestic-energy-affordability-support-schemes-in-northern-ireland-interim-evaluation

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