



Energy Diaries 2026 - Gas in a digital age

Exploring energy needs across the spectrum of digital engagement

Full report
October 2026

Thinks
— Insight & Strategy —

Cadent
Your Gas Network

Thinks
— insight & strategy —



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Background, method and sample





Background

CADENT'S MESSAGE

As the UK's largest gas distribution network and a provider of a critical service to over 11 million properties in the UK, Cadent is responsible for keeping people safe, warm, and independent in their homes and organisations.

Cadent does this with a keen eye to the future: decarbonising its business, while investing in green alternatives to fossil gas to help fuel the UK for generations to come.

RESEARCH OBJECTIVES

As part of its ongoing work to help customers work towards a sustainable future, Cadent has commissioned Thinks Insight & Strategy to conduct research on the topics of energy and sustainability, with a focus on those who are digitally disengaged, and remote carers.

The core research question is as follows: **How do customers across the digital engagement sector interact with the energy sector, and how should the sector adapt to ensure everybody remains included amidst digital progression and the energy transition?**

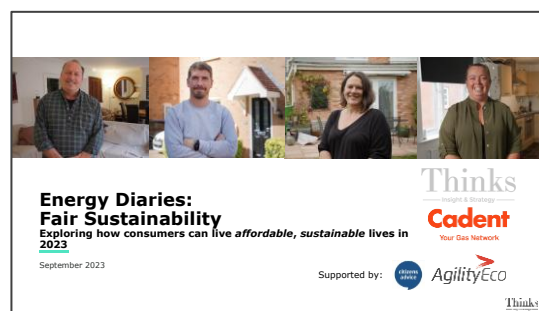
This is the fifth iteration of the Energy Diaries research

Since 2022, Cadent and Thinks Insight & Strategy have conducted annual research with customers to understand key issues relating to energy usage, behaviours, sustainability and the cost-of-living crisis. This piece of work is the next iteration, **now focusing on digital behaviours and those who care remotely**, including managing energy for the person they care for

Energy Diaries 2022



Energy Diaries – Fair Sustainability 2023



Energy Diaries – Voices of the future 2024



Energy Diaries – A business view 2025



Energy Diaries – Gas in a digital era 2026

As with previous years, our 2026 research included qualitative and quantitative components

METHODOLOGY

Phase 1: Qualitative diary phase and in-depth interviews

19th March – 11th May

Week-long diary task with 26 customers and eight remote carers, followed by a 60-minute in-depth interview, to understand their attitudes and needs when it comes to digital technology and energy. The findings were later presented during the co-creation session.

Phase 2: Co-creation expert workshop

4th June

A session was held with a range of experts in technology, energy and caring, to brainstorm possible ideas and interventions, in light of the qualitative findings.

Quantitative surveys

17th – 25th August

An online survey with 2,024 nat rep respondents and 1,092 in fuel poverty and a CATI survey with 100 digitally disengaged respondents to quantify the issues raised in the qualitative phases.

Quantitative tracking survey*

June (complete) and September (TBC)

Two waves of an online tracking survey with 2000 domestic customers to explore how key issues have changed over time.

*Data in separate report.

We heard from 26 customers and eight remote carers as part of the qualitative process

General criteria	Main customer	Remote carers
Gender	9 x male 9 x female	3 x male 5 x female
Age	7 x 18-25 2 x 26-50 11 x 50-69 4 x 70+	1 x 18-25 2 x 26-50 4 x 50-69 1 x 70+
Area	7 x urban 13 x suburban 5 x rural	2 x urban 4 x suburban 2 x rural
Ethnicity	19 x White British 6 x ethnic minority	6 x White British 2 x ethnic minority
SEG	6 x ABC1 19 x C2DE	
Digital confidence	12 x high 6 x medium / low 7 x very low	
Vulnerability	14 x financially 11 x health / disability 15 x fuel poverty*	



Importance of energy

All use mains gas and electric with a range of heating systems, including smart and A/C.



Attitudes towards technology, cyber and AI

Mixed levels of concern or anxiety about situations such as cyber threats, increasing dominance of technology in our everyday lives and the use of AI.



Carers: support provided

All to be supporting a relative remotely with day-to-day care. Support includes managing energy use or payments on behalf of the person they care for.

*Fuel poverty for qualitative respondents defined as spending more than 10% of household income on energy bills

We then surveyed 2,629 people quantitatively

N=2024 nat rep sample

Nationally representative in terms of:

- Age
- SEG
- Gender
- Geography
- Ethnicity

N=505 fuel poverty boost (same survey as nat rep)

Defined as those who:

- *Have less than £373 per week after paying rent/mortgage*
- *Would be extremely or very worried if their energy bill came in twice as much as expected*
- *Have ever avoided topping up their gas or electricity meter to make sure they had money for necessities (if on a meter)*

N=100 CATI sample (unique survey tailored to CATI)

Defined as digitally disengaged in terms of:

- *Those who selected 4 or less options from a list of tasks completed online*

Criteria		Nat rep online sample	Fuel poverty* online sample (boost)	CATI offline sample
TOTAL		2024	505	100
Gender	Male	1007	232	38
	Female	1010	271	61
Age	18-24	192	30*	-
	25-30	188	50*	-
	31-34	192	41*	-
	35-50	495	125	1
	51-64	465	146	9
	65-74	279	75*	27
	75+	213	38*	63
Ethnicity	White British	1742	442	90
	Ethnic minority	252	58*	5
SEG	ABC1	1048	208	60
	C2DE	976	297	37
Region	England	1685	409	88
	Scotland	175	41*	6
	Wales	98*	21*	5
	Northern Ireland	66*	34*	-
Digital confidence	Confident	1652	387	-
	Not confident	88*	27*	-
Fuel poverty	Living in fuel poverty	587	505	19

Throughout this report, quantitative data is used in different ways, including reporting on the CATI, and various different sub-groups within the online survey (fuel poverty respondents, remote carers and different levels of digital engagement). Where there were minimal sub-group differences, or to aid the readability of the report, the online nat rep sample has been used. In the report, references to the 'fuel poverty' audience include those in the 'fuel poverty online sample (boost)' as well as those who qualified as fuel poverty in the 'nat rep online sample' (n=1092 total). It does not include the CATI fuel poverty respondents due to the differences in surveys which means data cannot be combined.

*Definitions in Appendix * Small base size (<100)

And consulted with eight industry experts in a co-creation workshop



Carents[®]



These data sets were brought together to create this report

Qualitative exploration

In our online community, customers were recruited across the digital spectrum (from high to low digital confidence). Screener responses and their qualitative feedback was used to establish three key groups: online first, online, but hesitant and predominately offline.

Expert input

An initial analysis based off our qualitative data was shared with industry experts for feedback and additional insights.

Quantitative validation

Quantitative surveys (online and CATI) were then used to gather more insight on the three established groups from the qualitative data.

It should be noted that the 'online, but hesitant' group was not well represented in the quantitative data: it is likely that they are too online to be suitable for CATI, but not online enough to be taking online surveys. Online survey data is not representative of the wider spectrum of digital engagement.

Key questions

How are customers thinking about how they might use and interact with digital in respect to energy? What can gas networks do to support them?

1

Digital behaviours

What are the unique pressures being faced by digitally disengaged people today, and how do customers of all engagement levels feel about rising use of digital in day-to-day life?

2

Digital energy behaviours

How do customers engage with/think about energy today? What are their day-to-day online behaviours when it comes to energy? How do they think they will use digital to interact with energy in the future?

3

Digital care

In what ways does digital technology benefit vs create additional challenges for those in caring roles? What might be the impact of increased digitalisation on those in caring roles?

4

Cyber and AI in the energy sector

How are customers' attitudes towards (and experiences of) cyber threats and AI driving their attitudes towards digital channels and services, and their overall digital confidence?

5

Digital in the energy transition

What are customers needs and expectations looking to the future, with respect to further digital progression and the energy transition?

6

Gas in a digital age

What support and advice do customers across the digital spectrum require now and in the future from the energy sector generally and the gas sector specifically to thrive?

Executive summary



Key insights: Main customers

Customers sit across a spectrum of digital engagement, reflecting differences in confidence, usage and trust. Despite this, concerns about increasing digitisation can be seen across customers. Many are fearful about AI and cyber-threats generally, but are also concerned about people being left behind during the energy transition.

1

Digital behaviours

Digital engagement exists on a spectrum, incorporating usage, confidence and trust. The research identified three groups on the spectrum, from 'online first', to 'online but hesitant' to 'predominantly offline'. Concerns about technology are not unique to the unconfident however, with 52% of the online sample taking steps to reduce their online use.

2

Digital energy behaviours

Almost all (90%) of the online sample are using digital tools for managing energy, because of the convenience and control this offers. Current usage is predominately focused on straight forward tasks such as bill paying and making contact. This usage is slightly higher for electrics vs gas: 72% pay their electricity bills online vs 60% pay their gas bill online.

3

Digital care

While 18% in our sample have a formal caring role, many more report offering informal support to somebody they know. Digital technology both helps and hinders this – enabling people to support remotely, while also often creating challenges and risking impacting independence. There is an expectation that the need for support may increase as services become more digital, risking the less confident get even more left behind.

4

Cyber and AI in the energy sector

Increased digitisation feels inevitable. Most assume this means increased use of AI (especially chatbots) which is met with caution across the digital spectrum, but centres on the less digitally confident; 73% of the online sample are worried that AI puts those who are not confident at risk. Worries about misinformation (81%) and cyber-threats (73%) are also widespread.

5

Digital in the energy transition

53% feel the energy industry becoming more digital is a natural progression. The 'online but hesitant' and 'online first' groups worry about how this will impact the less digitally confident and the 'predominantly offline' (CATI) sample indicate a range of worries from security and usability. 32% of the online sample also say they already seeing confusing online content about sustainable energy.

6

Gas in a digital age

88% agree with the statement 'gas networks need to understand who is digitally disengaged to ensure their services are accessible to everyone'. There is an opportunity for gas networks to develop a 'digital conscience': making services as accessible as possible, supporting those that lack technical skills and providing offline alternatives.

Key insights: Remote carers

Remote carers use a range of digital tools to support the people they care for, including with their energy needs. These tools are typically seen to be beneficial, however concerns regarding their risks and the additional burden they can create are also cited. Remote carers act as vital intermediaries – benefiting from digital services themselves, while helping to ensure others are not left behind.

1

Digital behaviours

46% Of those who care for others remotely rely on digital services to help pay the energy bills for the person they care for. However, digital tools can lead to issues, particularly for those who care for someone predominantly offline, as they typically have to spend more time teaching or explaining these tools.

2

Digital energy behaviours

Remote carers who are digitally confident particularly appreciate that digital tools make managing energy easier and more convenient. These tools also give peace of mind that those they are for are warm and safe. However, there are drawbacks, such as increasing the amount of time they spend helping people carry out online tasks and the potential infringement on their independence.

3

Digital care

18% of our sample have a caring role. Many more offer support informally. The need for support for some may increase as services become more digital: 59% agree with the statement 'I worry that some people will have to provide more support for those who are less digitally confident as digital services increase.'

4

Cyber and AI in the energy sector

Increased digitalisation including AI presents further risks for those who are less digitally confident, thereby potentially increasing the burden on those who care for them.

5

Digital in the energy transition

With those who are predominately offline reporting that they will likely need more support should the energy sector become more digitalised, carers are at risk of needing to deliver more support.

Key insights: Fuel poverty

Those in fuel poverty face day to face challenges in keeping on top of bills and managing household finances. They monitor and think about their energy usage for this reason, and prioritise reducing bills when thinking about any changes to the sector in terms of digital progression. There is also some evidence financial hardship can relate to digital confidence, and can impact digital access.

1

Digital behaviours

Digital confidence (79%) and knowledge (62%) is slightly lower among those experiencing fuel poverty compared to the online nat rep sample (82% and 68% respectively).

Furthermore, 40% of those living in fuel poverty say they couldn't afford to replace a device if it broke, and 10% say they struggle to afford an internet connection.

2

Digital energy behaviours

Those in fuel poverty spend much longer thinking about their energy use, with many using digital tools to closely monitor their usage, in an attempt to keep their bills manageable.

3

Digital care

Those experiencing fuel poverty have slightly higher portions of those with caring roles than the main sample, indicating dual strain that can be put on some customers.

4

Cyber and AI in the energy sector

Consistent with the main consumer group, those in fuel poverty are predominantly concerned about misinformation and cyber-attacks, however these concerns are stronger in this group. They are also more likely (compared to the online nat rep sample) to be worried about those who are less digitally confident being left behind.

5

Digital in the energy transition

Those in fuel poverty have largely the same needs as the main consumer sample, but forefront affordability of bills.

Key insights: Experts

Experts recognise that digital engagement exists on a spectrum, and organisations that fail to cater for the less digitally confident risk excluding them. They see increasing digitalisation and use of AI as increasing the burden on friends/family members to provide support. Experts advocate for education and communication, particularly at a community and local level, to support those that need it.

1

Digital behaviours

Skills and trust are felt to be important elements to ensuring strong digital engagement. Experts recognise that building these skills and trust can be difficult.

2

Digital energy behaviours

Experts recognise that family dynamics are changing in relation to increasing digitalisation, particularly around essential services such as energy. They see many family members having to become more heavily involved in supporting those with less confidence and skills.

3

Digital care

In an increasingly digital world, experts (particularly those working in the charity sector) report seeing instances of family members having to spend more time trying to support those who are less digitally capable. This often tends to be elderly parents or grandparents.

4

Cyber and AI in the energy sector

Experts agree that there is a lack of trust amongst the public when it comes to digital technology, especially in terms of its security and AI.

5

Digital in the energy transition

Experts see the energy transition as a key area in which the energy sector must strengthen the ways it communicates with and educates the public.

Digital behaviours



The qualitative research engaged a number of customers who have different relationships with digital technology



Online first

For this group, digital technology is deeply embedded in everyday life. Their **usage, reliance** and **confidence with digital technology** is high.

"I feel fairly confident using digital tools for my energy and heating. I can usually find what I need and sort things on my own."

Main customer, online first, 18-25



Online, but hesitant

This group **still complete many daily tasks online**, but often express **reluctance** or **concerns** about doing so.

"I'd struggle using a computer. Having to use passwords for virtual everything can be difficult to keep track of."

Main customer, online, but hesitant, 50-69



Predominantly offline

This group either are **predominantly offline in the traditional sense** (i.e. have no access to internet) or **actively choose not to learn digital skills** or are **unable to do so with support**.

"I avoid [digital tech]. I like doing things on the phone always."

Main customer, predominantly offline, 50-69

Quantitative surveys were used to further explore the attitudes, behaviours and needs of these groups

Represented in the main online survey



Online first (n=1652)

While only a small portion of our qualitative sample, this group made up the majority of our online quantitative sample (82%, n=1652)

Defined as those answering 'extremely confident' or 'confident' to the question 'How would you describe your level of digital confidence?'



Online, but hesitant (n=88)

This group made up most of our qualitative sample, but 4% (n=88) of our online quantitative sample fall into this group:

Defined as those answering 'not confident' or 'not at all confident' to the question 'How would you describe your level of digital confidence?'

Represented in the CATI survey



Predominantly offline (n=100)

They **made up a small minority in the qualitative sample and were represented quantitatively through a CATI survey (n=100).**

Defined as those who selected 4 or less options from a list of tasks completed online.

Only a small portion of this group was represented in the quantitative data; the online nature of the survey predetermined a certain degree of digital confidence.

A further two groups – which exist across the digital spectrum – were also explored in both the quantitative and qualitative research



Carers (n=371)

This group **all support a relative with day-to-day care** (e.g. helping them pay bills online, manage banking, login to entertainment services etc). Many do this remotely.

N=8 of our qualitative sample were remote carers, while **18%** in the quantitative survey have a caring role for somebody, defined as those who answered yes to the following:

'I have a caring role for another adult (e.g. an adult child, a parent, a partner) who does / does not live with me'.



Those in fuel poverty (n=1092)

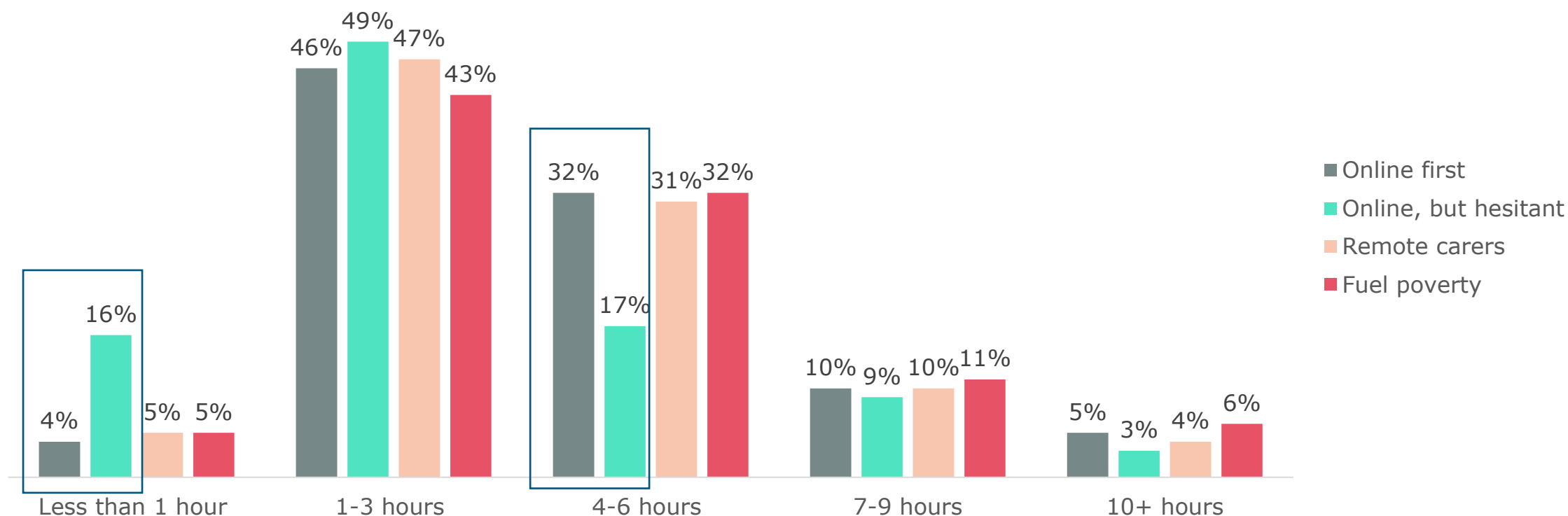
This group are on lower incomes and struggling to keep with their bills. Around half of our qualitative sample fit into this group, and 1092 respondents were represented quantitatively, defined as those who:

- *Have less than £373 per week after paying rent/mortgage*
- *Would be extremely or very worried if their energy bill came in twice as much as expected*
- *Have ever avoided topping up their gas or electricity meter to make sure they had money for necessities (if on a meter)*

**Represented in the main online survey.
These groups overlap with the three groups on slide 20.**

These groups sit across a spectrum of usage; those with lower confidence are more likely to spend less time on screens than those with higher confidence

In an average day, approximately how much time do you think you spend on screens for personal (i.e. not work related) tasks?



Q6. In an average day, approximately how much time do you think you spend on screens for personal (i.e. not work related) tasks? This includes time on phones, tablets and laptops. Base:: Online first (n = 1,652), online but hesitant (n = 88), remote carers (n = 1,072), those in fuel poverty (n = 1,092)

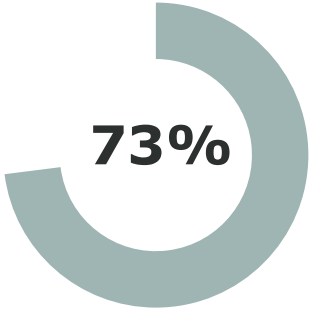
These groups were shared with our experts, who recognised and supported a 'spectrum of engagement'

- Experts involved in this research are in agreement that a spectrum of digital engagement is a helpful tool for understanding customer needs.
- They agree we are not yet completely 'digital first' as a society, with many still preferring offline options.

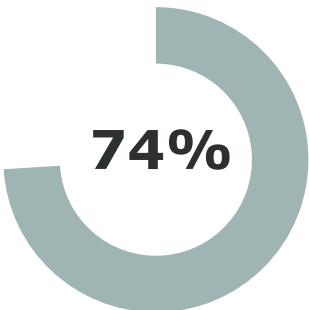
Experts who work closely with digitally disengaged people also highlighted the important role that physical health conditions and disabilities can play when thinking about digital engagement.

Usage of digital technology is innate to the 'online first' group, who use tech across their lives

- The 'online first' customers are the most confident with using digital technology, driven through their regular usage.
- In the quantitative sample, **this group skew towards those aged 18-34 and 35-54** compared to the 55+ age group (92%, 88% and 69% say they are confident digitally, respectively).
- These customers **use technology for everything** from **communication** and **entertainment** to **shopping** and **admin**, including tasks relating to their **work**, their **finances** or their **personal data**. Several remote carers fit into this group, and **use technology to support caring for their loved one**.
- Digital by default, **these customers prefer online options to solve simple issues** and would be frustrated if offline routes (such as telephone) were the only option available.



of 'online first' respondents say 'I have the knowledge and skills to do most things I need to online'.



of 'online first' respondents say 'I am confident to do most things I need to online'.

"I'm 23. My whole life has been with technology. We are the first generation to fully take it in."

Main customer, online first, 18-25

Q2 Which of the following apply to you? Base: Online first respondents (n=1,652)

Hamza, 23



Digital by default

Hamza works in AI software sales. He describes himself as **part of the first generation to have fully grown up with technology**, and rarely questions whether something should be done online; digital services feel **intuitive and embedded into his daily life**.

Unlike older generations who have had to adapt to digital services over time, Hamza sees **technology as a natural part of everyday life rather than something that needs to be learned**.

Forms of detriment



Personal data concerns



Lack of trust in data companies

Digital activities



Social media



Online banking



Online shopping

Embracing technology with caution

Hamza’s experience working in technology means he is **critical of digital services that add complexity, remove human interaction or fail to improve the customer experience**.

He is particularly sceptical of organisations introducing new technologies simply because they are available, **believing digital services should solve genuine problems and make tasks easier for users**.

Usage and attitudes

37%

Embrace all new technology

63%

Able to cope with digitalisation

“I’m 23, my whole life has been with technology; I have always been around it, and [are] the first generation to fully take it in. But I am not sure how much I really like [new] technology, especially around AI. We [shouldn’t] rely on it too much.”

Privacy, trust and control

Hamza is generally **positive about new technologies** and believes **digital services can improve convenience and efficiency**.

While recognising the benefits and use cases of AI, **he is sceptical of organisations relying too heavily on automated systems**. Maintaining transparency, accountability and access to human support remain important factors in building trust.

Key concerns

72%

Threat of cyber attacks

81%

Spread of ‘fake news’ online

Michael, 50



Digitally comfortable

Michael is 50 and lives with his son in a semi-rural area in North West England. Whilst he **grew up with limited access** to technology, **Michael now finds himself using digital technology regularly**, particularly via apps. It is **important** for Michael that he is **comfortable using digital technology** as he believes that it will play a **significant role in the future**.

Forms of detriment



Cyber attacks



Safety of personal information



Benefits of technology

For Michael, **the convenience** that comes from using **digital technology makes it worthwhile** learning how to use it. For example, he pays his bills or accesses his medical information at home. When **doing a new task digitally** or **using a new app**, Michael will ensure he **spends time understanding how to do the task** as well **as exploring what's available** in the app.

Usage and attitudes

69%

Agree everybody should learn how to use digital technology because that is the direction the world is going in

Digital activities



Social media



Online banking



News



Privacy, trust and control

Michael has **previously been a victim of bank fraud**, and he was **only alerted to this because of his banking app**. This experience **built his trust in digital technology**. However, he recognises that **concerns about cyber attacks** could **limit how comfortable other people feel about using digital technology** in their day-to-day lives, especially if this includes **personal information**.

Key concerns

72%

Threat of cyber attacks

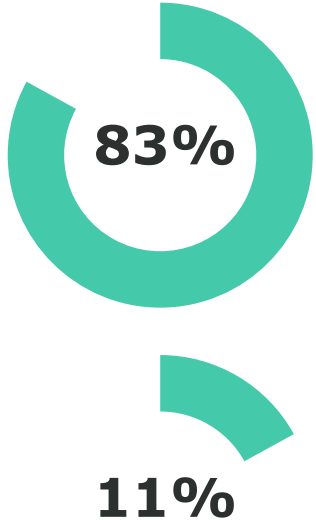
81%

Spread of 'fake news' online

"Sitting on your sofa at 8pm at night paying a bill is far better than going in your lunchtime and rushing around. That's what you used to do years ago or taking half a day off for the doctor's appointments."

Customers who are 'online, but hesitant' are still users of technology, but with lower confidence

- This group have been driven to use digital technology for four key reasons:
 - A feeling that they **have to adapt** to digital ways of doing things, because offline versions are being phased out
 - A feeling that learning how to use technology will bring **personal benefit**
 - Their **workplace adopting technological advancements**, requiring them to adapt
 - **Support** from people around them, particularly children and grandchildren, who teach and reassure
- Their **technology usage (e.g. online shopping, email, managing bills) is somewhat in line** with those who have higher confidence.
- However, unlike the 'online first' group, **these customers are often restricted to a more limited portfolio of tasks**. Tasks which relate to complex/high value finance decisions or anything involving personal data are still often completed offline.
- **Some digital tools still feel challenging to use**, as this group often feel nervous about their tech skills. This **feels prominent among remote carers** within this sample as **they can feel nervous about helping the people they care for, when they are not sure themselves**.



of 'online, but hesitant' respondents are worried about the increasing dominance of digital technology in their everyday lives.*

of 'online, but hesitant' respondents feel able to cope with more services becoming digital.*

"I do want to learn how to use online services, but it's just this anxiety around how or where my information is. I would say I am getting more trustworthy – for example, I feel fairly relaxed with my account details on the British Gas App. It's just the lack of education my generation has with the internet."

Main customer, online but hesitant, 70+

Q1 Which of the following apply to you? Base: Online, but hesitant respondents (n=88). *Note base size is <100

Gerald, 55



Digital by necessity, not preference

Gerald, 55, lives with his daughter and granddaughter after leaving work due to ill health.

He does not actively seek out new technology and would still prefer many offline ways of doing things, particularly using cash. **However, he recognises that some digital services are now difficult to avoid**, and sees learning them as **part of adapting to a changing world rather than a personal interest.**



Gradual acceptance of digital services

While Gerald remains more comfortable with traditional ways of doing things, he has become **increasingly familiar with certain digital tools through regular use, e.g. online banking.**

Family plays an important role in helping him engage with technology; his daughter supports him with online shopping when needed, and seeing younger generations use technology naturally has **reinforced his view that digital services are becoming an unavoidable part of everyday life.**



Ongoing worries and uncertainty

Gerald remains cautious about technology and **continues to worry about scams, fraud and artificial intelligence.** While he views these risks as exclusive to digital technology, he recognises that **risks and bad experiences can occur in many areas of life.**

The rapid pace of digital change can **feel overwhelming, particularly when new systems replace familiar offline methods.** Technology is often viewed as necessary, but not always trustworthy.

Digital activities



General browsing



Online shopping



Online banking

"It's the fraudulent things that bothers me [about technology] really. People can hack into these things [devices] just like that. But then saying that, it can happen to most things anyways, so there's not a lot you can do really."

Forms of detriment

74%

Tech makes life more difficult

81%

Overwhelm around pace of change

Usage and attitudes

68%

Feeling less independent

78%

Feel unsure of themselves

Key concerns

88%

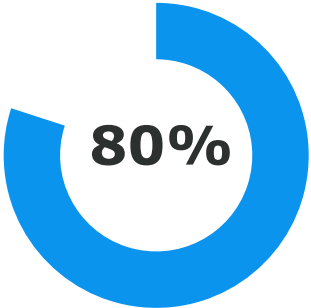
Threat of cyberattacks

88%

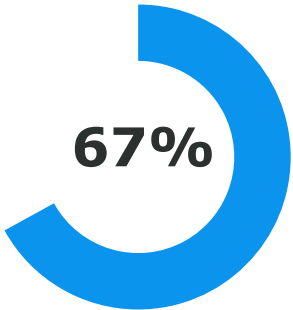
Use of AI in everyday lives

Those who are 'predominantly offline' demonstrate no real desire to engage with digital technology

- This group tend to be older (typically 75+), no longer working, and in our quantitative sample, skewed female.
- This group are not motivated to learn digital skills. This is largely because they **do not think that digital technology provides any personal benefit** to them, and they are happy without it.
- **Some within this cohort simply prefer the offline world, while others are actively fearful of technology.** While the biggest voiced barrier to being online is a lack of motivation or desire, it is likely for many individuals that a lack of confidence in using the tools correctly is actually playing a key role.
- For some, they can feel **increasingly frustrated** by the lack of offline options in an increasing digital world.
- This can heighten **feelings of exclusion**, especially in situations where they do not feel adequate accommodations are in place for them.



of 'predominantly offline' respondents agree with the statement 'services going digital makes my life more difficult'.



of 'predominantly offline' respondents agree with the statement 'I feel overwhelmed by the pace of change of digital technology'.

"I don't really want to use digital stuff. If I need to use it, it would not be at home, I can go to my local library. I want to do it then, get it done and forget. I don't want to embrace [new technology] or want to be involved."

Main customer, predominantly offline, 50-69

Q9 Below are a number of statements about using digital technology. Which, if any, do you agree with? Base: Predominantly offline respondents (CATI) (n=100)

Jen, 74



Preference for offline methods

Jen has **limited engagement** with digital technology and **continues to prefer offline ways of doing things wherever possible.**

Paper records feel **easier to understand and more reassuring than information stored online.** Familiar processes are viewed as straightforward and reliable, and Jen sees little reason to change ways of doing things that already work for her.

Forms of detriment



67%

Value real life interactions Overwhelm around pace of change



Limited personal value in digital services

Jen **does not feel that digital technology significantly improves her day-to-day life.** She uses email, texting and basic mobile phone functions when necessary, but **sees little reason to adopt additional digital services.** Many online services feel unnecessary for her needs, particularly when offline alternatives already work well. **Jen typically prefers direct, familiar interactions and struggles to see benefits from further digitalisation.**

Statements and attitudes

59%

No point trying to learn Digital services make life harder

80%

Digital activities



Emails



Communication via social apps



Growing concerns around digital exclusion

While Jen accepts that technology will continue to evolve, **she worries about a future where people are expected to use digital services regardless of their confidence or preferences.**

Jen does not believe support is impossible. She feels that clear guidance, simple instructions and access to real people could help build confidence when change is unavoidable. **However, concerns remain about becoming increasingly dependent on others if digital channels become the only option available.**

Key concerns



AI in public services

72%

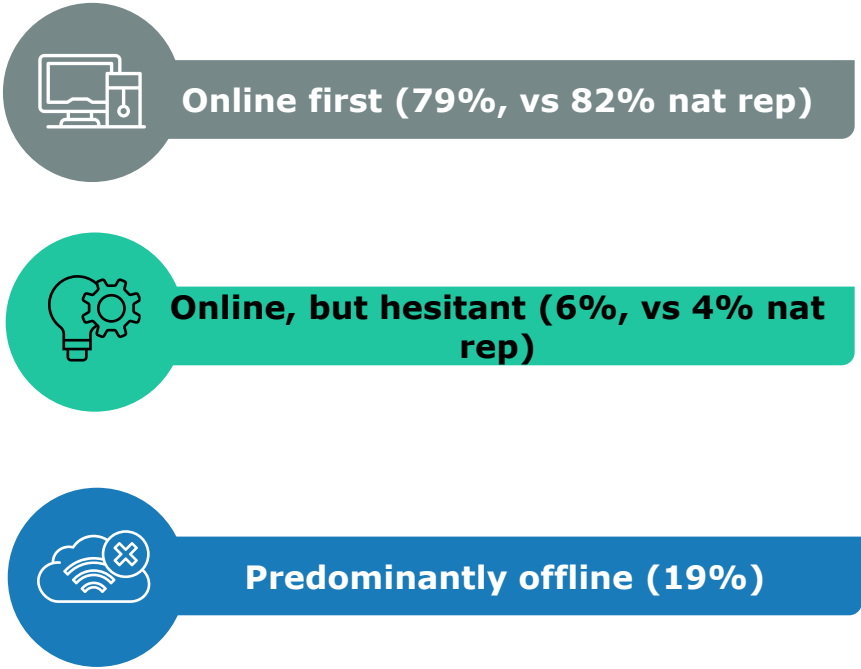
Threat of cyberattacks

"It's expected that you've got to move with the latest technology; you're expected to be part of it, because otherwise you can't do stuff...[this is] a worry that [I] have, [that] I'll have to change in the future."



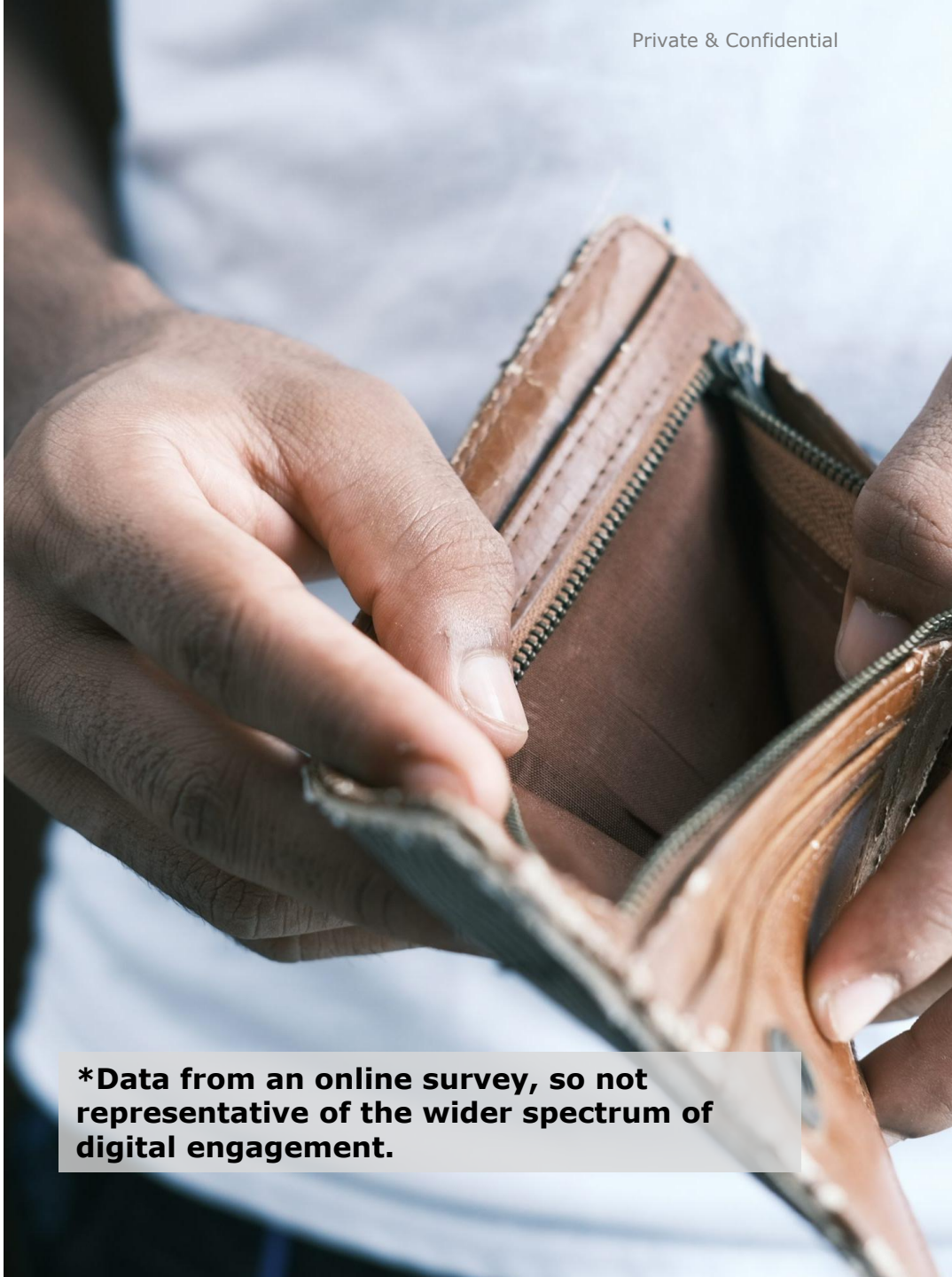
There is evidence of a relationship between **fuel poverty** and digital disengagement

Those living in fuel poverty fit across the three digital spectrum groups as follows*:



This indicates digital confidence and knowledge is also **slightly lower among those experiencing fuel poverty compared to main customers.**

Q1. Which of the following apply to you? Base: All fuel poverty respondents (n=1,092)
Q2. Which of the following apply to you? Base: All fuel poverty respondents (n=1,092)



***Data from an online survey, so not representative of the wider spectrum of digital engagement.**

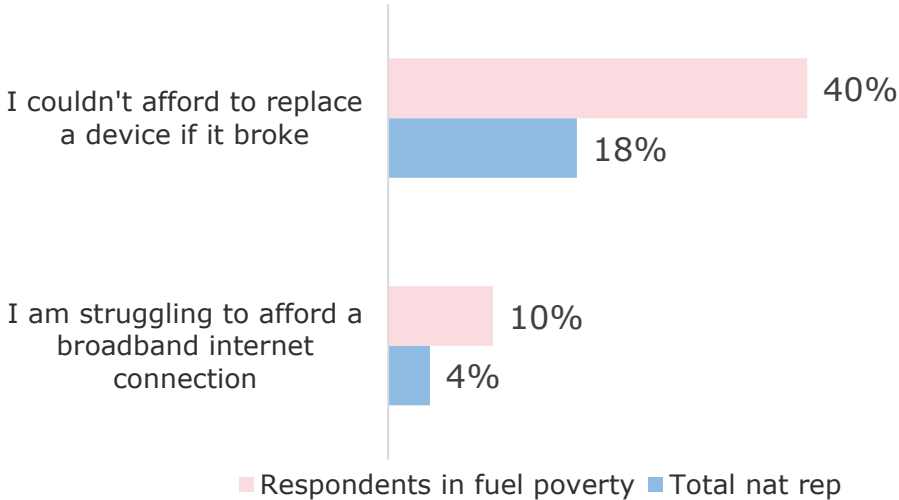
Financial stability plays an important role when considering digital inclusion

For those experiencing fuel poverty, financial stability plays a role in their **access** to digital technology.

Fuel poverty increases potential exposure to digital exclusion:

- Those in fuel poverty may remain digitally active, but economically fragile.
- As such, their **continued digital access is not a guarantee**; a broken device could result in not being able to get online, while an unexpected bill could result in struggles to afford an internet connection becoming more prominent.

Which of the following apply to you?
Showing % who select yes



Experts working in the charity sector emphasised the fragility of circumstances: people can move up and down the spectrum of digital engagement as their circumstances change e.g. job loss.

Q3 Which of the following apply to you? Base: All nat rep respondents (n=2,024); All fuel poverty respondents (n=1,092)

Skills and trust also play an increasingly important role when thinking about digital engagement

Digital behaviours

Skills	Despite increasing access and usage of digital tools, many still lack confidence and understanding of how to properly use them. They may need to be physically shown how to complete tasks online by another person and, without repeated exposure, risk forgetting how to do things. Even with education, they may be slower and less capable than those who are more technologically savvy.
Trust	Those with lower trust in technology are more likely to be digitally excluded for three reasons: • They do not trust the cybersecurity measures in place • They do not trust the technology to work in the intended way to deliver the outcome they want • They don't trust the motivations of the companies that 'push' digital advancement – customers see this as a cost-saving measure. This can demotivate them from learning how to use the technology, often being more comfortable doing things 'they way they have always done it' i.e. offline.

Individuals who are online but struggle with skills and lack trust are at risk of being digitally excluded as they may struggle to keep up with the pace of change from digital advancements and feel isolated should offline options no longer be available to them.

Concerns about tech are not unique to the digitally unconfident: over half those from the online nat rep survey are taking steps to reduce time spent online

52%

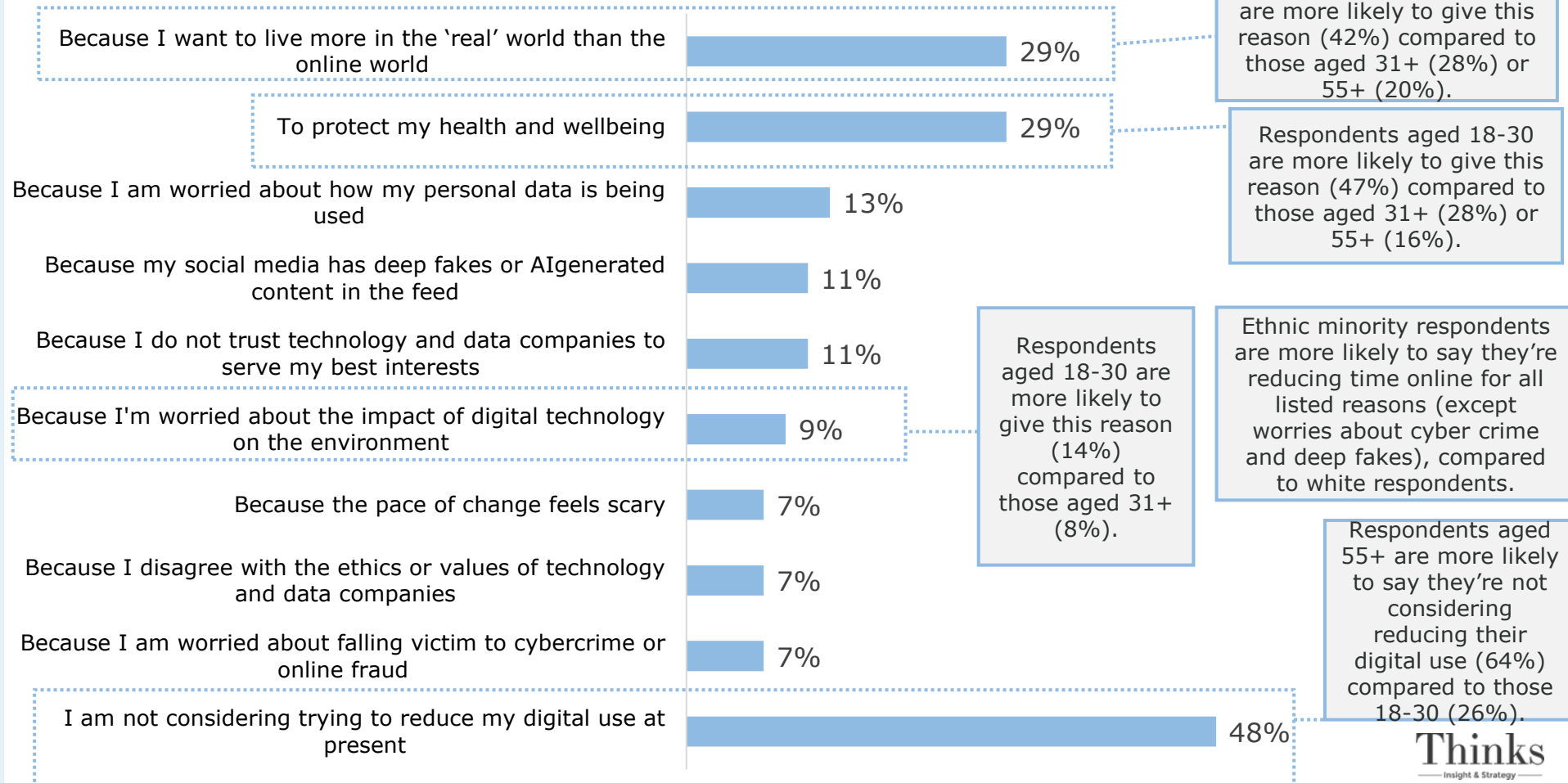
of online respondents say they are reducing their online use for at least one reason

Respondents aged 18-30 are more likely to have at least one reason for actively trying to reduce online usage (74%) compared to those aged 31+ (47%) or 55+ (36%).

ABC1 respondents (66%) are more likely to be reducing usage compared to C2DE respondents (48%).

Q7. Which of the following statements do you agree with? Please select all that apply. I am actively trying to reduce how much I go online.. Base: All nat rep respondents (n=2,024); 18-30 (n=380); 31+ (n=1644); 55+ (n=811); ethnic minorities (n=252); white respondents (n=1742)

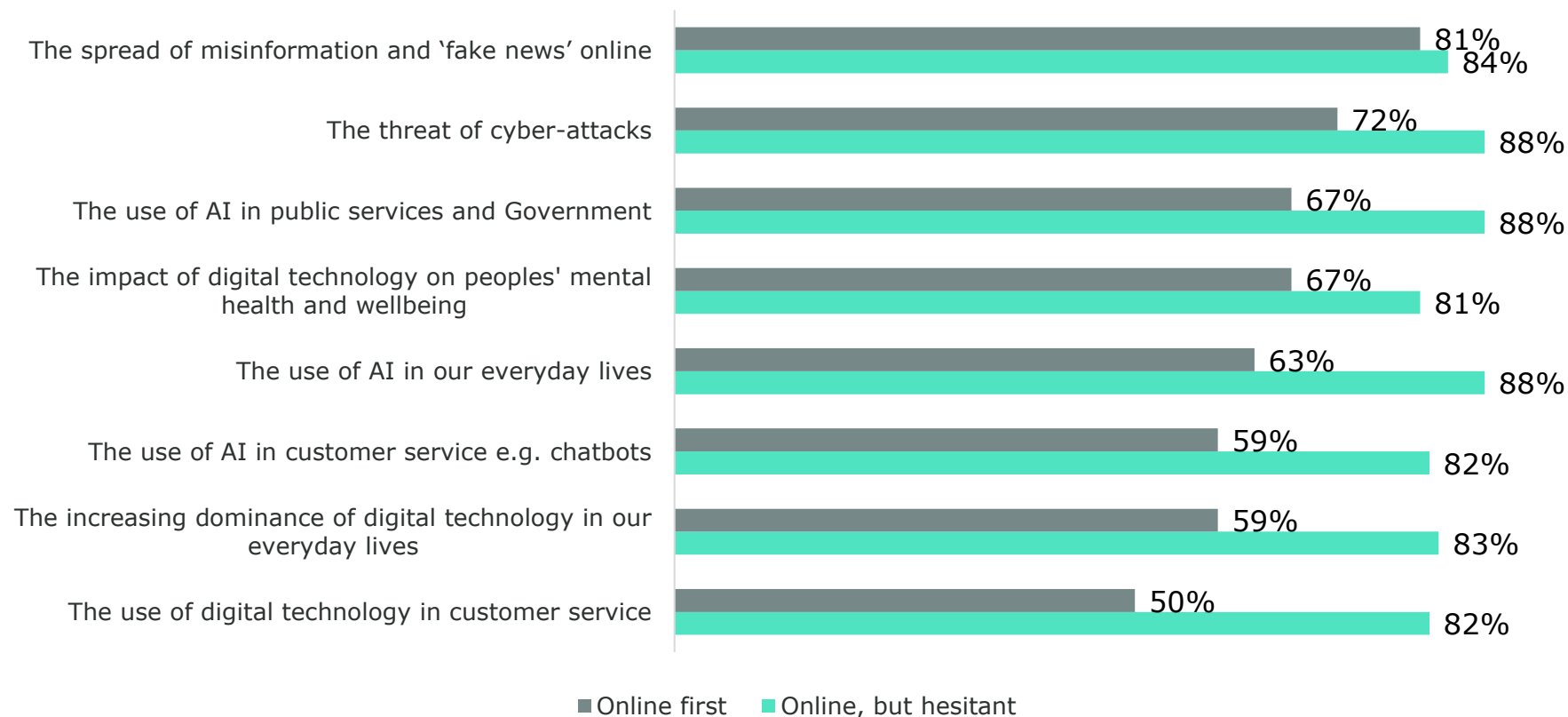
Which of the following statements do you agree with? I am actively trying to reduce how much I go online...



And concerns about **misinformation and cyber threats**, whilst highest amongst less confident groups, are widespread across all

Worries about digital technology

Showing NET: worried



Across all statements (except the use of AI in customer service), women are more likely than men to be worried.

Across all statements (except the impact on mental health), those aged 55+ are more likely to be worried, compared to the total.

Across all statements, those in fuel poverty are more likely to be worried, compared to those who aren't.

Q8. How worried would you say you are with the following? Base: Online first respondents (n=1,652), Online, but hesitant respondents (n=88)*

Digital energy behaviours



Customers across the sample are using digital to manage accounts, pay energy bills and communicate with suppliers

Across levels of digital engagement...

"I'm perfectly fine managing bills online. My partner isn't so much so I tend to do it. You can check everything online, send meter readings, everything."

Main customer, online, but hesitant, 50-69

... age...

"I have the [supplier] app on my phone to keep a check on bills and usage."

Main customer, online first, 50-69

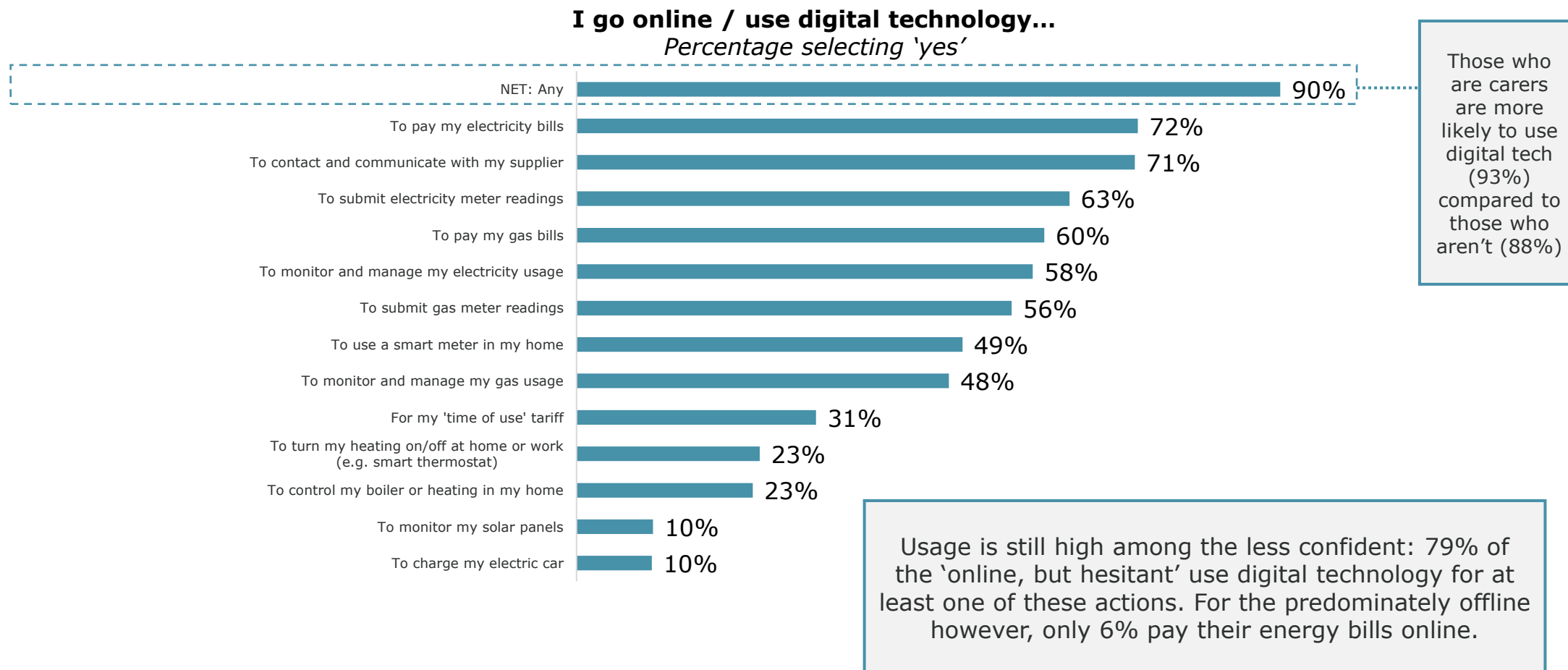
... and household circumstance

"The digital accounts work extremely well for making payments, requesting money back, submitting readings."

Main customer, online first, 18-25

Digital energy services are generally viewed to be straight forward and easy to use, even among less confident customers.

Using digital tools for managing basic energy tasks is widespread amongst most; but predominately focused on straight forward tasks such as bill paying



This usage is slightly higher for managing electricity vs gas

I go online / use digital technology...

Percentage selecting 'yes'

NET: Any 90%

To pay my electricity bills 72%

To contact and communicate with my supplier 71%

To submit electricity meter readings 63%

To pay my gas bills 60%

To monitor and manage my electricity usage 58%

To submit gas meter readings 56%

To use a smart meter in my home 49%

To monitor and manage my gas usage 48%

For my 'time of use' tariff. This is the tariff that offers energy at reduced prices / for free at certain... 31%

To turn my heating on/off at home or work (e.g. smart thermostat) 23%

To control my boiler or heating in my home 23%

To monitor my solar panels 10%

To charge my electric car 10%

ABC1 respondents (67%) are more likely to do this than C2DE respondents (59%).

Those more likely to do this are:

- Those aged 18-30 (50%) compared to those 55+ (41%)
- ABC1 respondents (52%) compared to C2DE respondents (43%).
- Ethnic minority respondents (57%) compared to white respondents (46%).

ABC1 respondents (75%) are more likely to pay their electricity bills online than C2DE respondents (68%).

Those aged 35-54 (74%) are more likely to do this than those aged 55+ (69%).

Ethnic minority respondents (79%) are more likely to do this compared to white respondents (71%).

Those aged 18-30 (63%) are more likely to use digital to pay their gas bill than those aged 55+ (55%).

Those more likely to do this are:

- ABC1 respondents (58%) compared to C2DE respondents (53%).
- Those aged 31+ (57%) compared to those aged 18-30 (51%).
- Ethnic minority respondents (62%) compared to white respondents (55%).

Those in **fuel poverty** report spending longer thinking about their energy use, with many using digital tools to closely monitor their spending

- For those who are struggling financially, keeping up with bills, including energy bills, is **a significant source of stress.**
- This means they may **closely monitor the amount of gas and electricity they use, and seek advice on how to reduce their usage further.**
 - The more digitally confident use online tools often to keep close tabs on their spending and usage.
 - One customer in particular describes needing to contact their supplier for emergency credit when she could not afford the bill.

"We try not to turn up the heating too much at the moment because bills are going up sky high. We only put it [the heating] on when we're really cold."

Main customer, predominantly offline, 50-69

The core motivations for using digital tools for managing energy are ease, convenience and control

Customers, including the 'online, but hesitant' group report finding the app they use to manage their energy as being **easy to use**, with clear, simple interfaces and intuitive functions.

Customers also value the **convenience** of being able to check usage or pay bills quickly and efficiently via their phone, without having to call up and risk being kept on hold.

Customers also report a sense of **control** from being able to physically see their usage and bill amounts whenever they wish.



Remote carers who are digitally confident are particularly appreciative of these benefits, which gives them **peace of mind** that those they care for are warm and safe.

While most see digital tools for managing energy as straight forward, there are concerns that it may become more complex

72%

Of respondents agree that if heating relied more on digital services or technology, some people would require additional support

33%

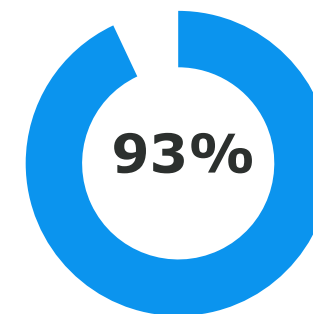
Of respondents say they would need more support themselves

41%

Of respondents say a family member would need more support

"If energy companies start providing most of their services digitally, it could impact my daily life quite a bit. I would need to spend more time learning new systems, apps or websites, which could feel stressful. I would also have to rely more on technology, which is something I'm not very confident with."

Main customer, online but hesitant, 50-69



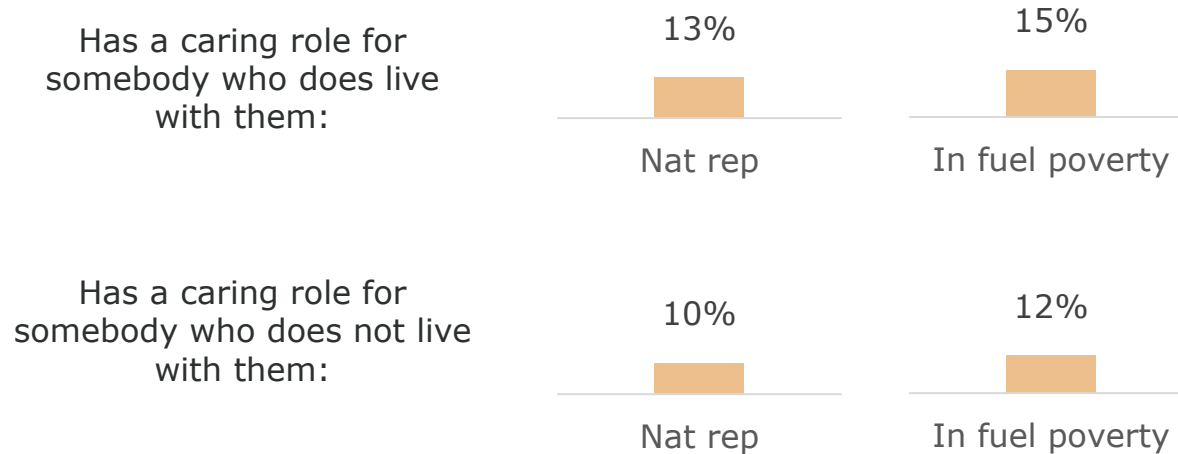
of 'predominantly offline' respondents agree that energy companies should always have an offline alternative to completing a task

Digital care



Within our sample, 18% have a caring role. Many also report informally supporting somebody they know

Formal support:



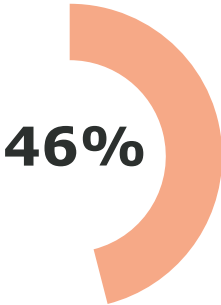
Those experiencing fuel poverty have **slightly higher portions of those with caring roles than the main sample**, indicating dual strain that can be put on some customers.

Informal support:



'Remote carers' use digital tools to help the person they care for in many different ways

- Digital technology, on one hand, **offers opportunities for carers to support remotely, which can save time and energy**. This is particularly helpful for those that do not live close by to the person they care for.
- Carers often **use technology as a communication tool as well as managing services online**. In most cases, the person they are caring for has a lower level of tech confidence, understanding and usage.



Of those who care for others remotely rely on digital services to help pay the energy bills for the person they care for

"[The supplier] sends me an email, so I'll make sure the bill is paid and they I'll send my brother a screenshot to say what money is getting paid on what date."

Remote carer, 50-69

"When I use FaceTime, I don't need to travel to solve problems for [the person I care for]."

Remote carer, 50-69

Q16. Which, if any, of the following statements apply to you? Base: All nat rep respondents (n=2,024); respondents in fuel poverty (n=1,092)



Haley, 50



Preference for digital, but cautious for others

Haley regularly uses digital services in her own life and relies on them to help support her 90-year-old grandmother remotely. Online shopping, email and digital accounts help her coordinate care, **allowing her grandmother to continue living independently.**

However, supporting her grandmother has made Haley increasingly aware that **digital services do not work equally well for everyone.**



Digitalisation increases caring responsibilities

As more services move online, Haley increasingly finds herself **stepping in to help her grandmother resolve issues with organisations** and access support when digital routes become a barrier.

Her grandmother strongly values her independence and prefers offline ways of doing things, **often creating additional caring responsibilities for Haley** as she **helps overcome digital barriers while ensuring her grandmother remains in control.**



Protecting independence and human support

Although Haley is comfortable using technology herself, **she is cautious about online only services.** Her grandmother values doing things her own way, whether that means paying bills offline, keeping written records or controlling her own heating. **Haley believes preserving that independence is often more important than maximising digital convenience.**

She worries that increasing reliance on **digital-only services could leave older people feeling excluded, lacking independence or left behind.**

Forms of detriment



Personal data concerns



Environmental concerns

Statements and attitudes

38%

More time for digital support to manage energy

49%

More time spent supporting with digital

Key concerns

46%

Scams and fraud



Fears of exclusion

Digital activities

Remote caring

Online shopping

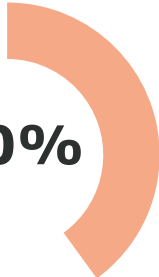
Online banking

"[Remote caring] is a useful way of ensuring the needs are met, especially when you aren't able to physically attend. However, things can take twice as long, and you are always dependent on [tech support] responding quickly to your query".

However, there are drawbacks of using digital tools for energy management

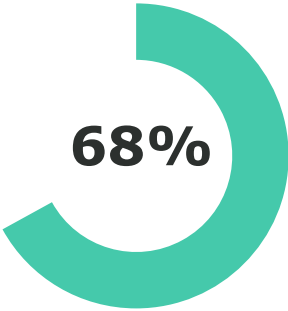
Three key drawbacks are mentioned:

1. Some report that increasing digital technology can **increase the amount of time they have to spend helping the person they care for carry out daily tasks**, predominantly because they often forget logins and passwords for online accounts.
2. Furthermore, switching to online tools risks **infringing on their independence**. This fear is also shared by many of those who are 'online, but hesitant'.
3. Finally, **access to more information on energy usage** can be anxiety inducing for some, who feel pressured to reduce it.



40%

Of those who have a caring role agree with the statement: 'The increase in digital technology means I spend more time now compared to previous years supporting somebody I know'



68%

Of those who are 'online, but hesitant' agree with the statement: 'I feel less independent because so much requires digital access'

"[my Dad] is not good with passwords. So when he gets it wrong and then saves the wrong password, it's a whole new stress for me."

Remote carer, 50-69

"The drawbacks are system breakdowns, excessive amount of time spent on the phone/site, dropped calls etc."

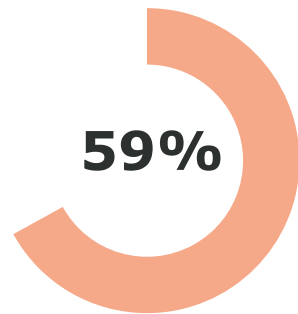
Remote Carer, 70+

"He's worried about what he's spending. If he goes to bed at 11 o'clock and he's spent £5.22 [on energy], he'll wake up in the morning and go, how can I make that less?"

Remote Carer, 50-69

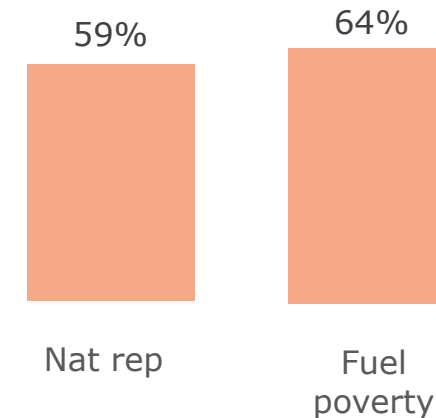
The need for support may increase as services become more digital

The pace of digital change may limit people's abilities to learn new skills, which may leave them requiring more help to complete digital tasks.



Of respondents agree with the statement: 'There is no point trying to learn new digital skills as the pace of change is so rapid.'

There is specific concern that **those less digitally confident will need more support** as digital services increase.



% agree with the statement: 'I worry that some people will have to provide more support for those who are less digitally confident as digital services increase.'

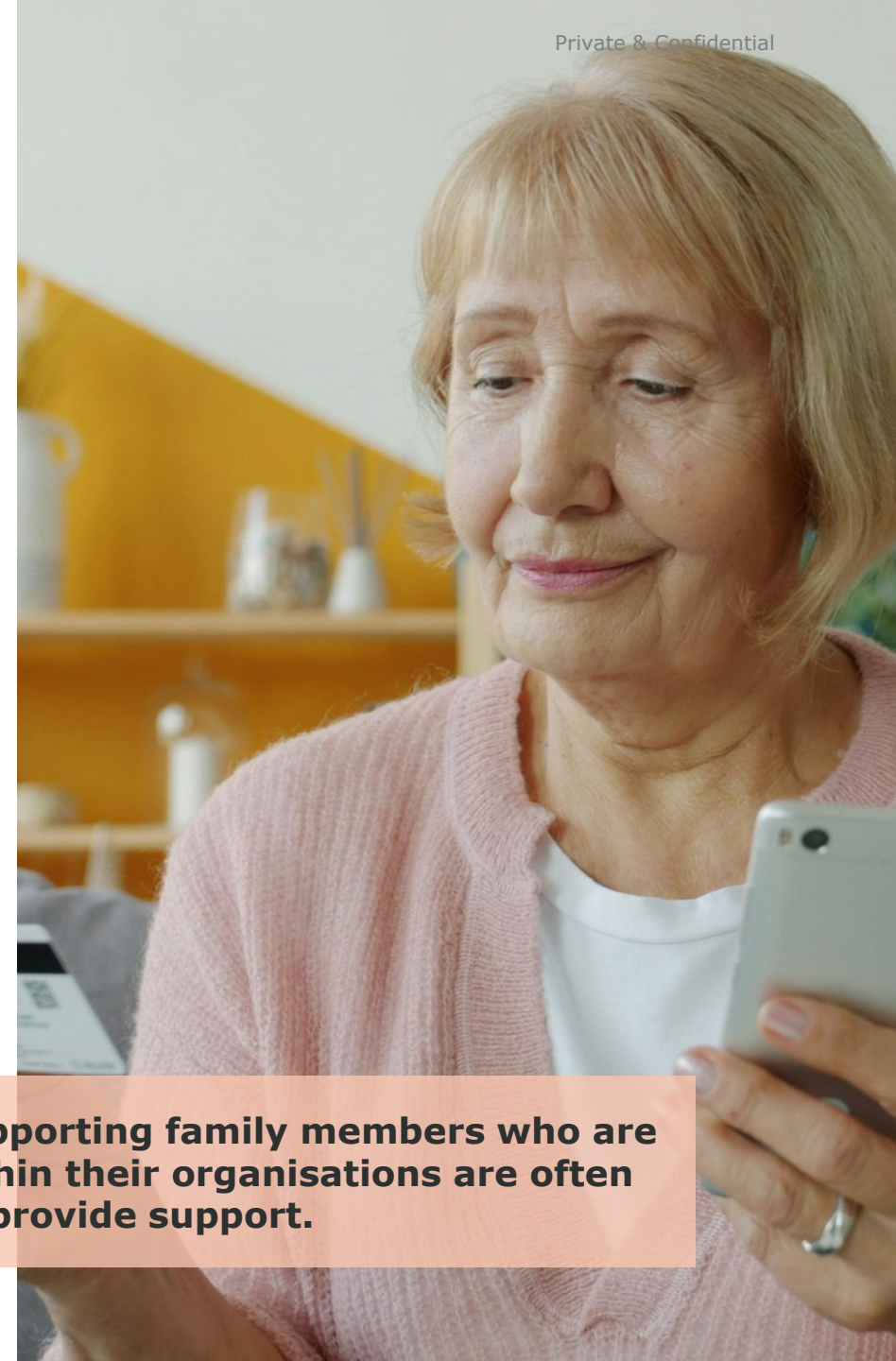
"I use a smart meter and can use it to find the information I need, but I don't think my dad can fully understand. I spend more time now remotely explaining what the screen is saying."

Remote carer, 50-69

Experts agree that family dynamic are changing in relation to increasing digitisation

- **This means many family members having to become more heavily involved in supporting those with less confidence and skills, even if not in a formal caring capacity.**
- In an increasingly digital world, experts (particularly those working in the charity sector) report seeing instances of family members having to spend more time trying to support those who are less digitally capable. This often tends to be elderly parents or grandparents.

Experts also talk about the specific challenges of GDPR when supporting family members who are digitally disengaged. They reflect on how GDPR restrictions within their organisations are often making it more difficult for family members to provide support.



Cyber and AI in the energy sector



**For customers,
increased
digitalisation of all
sectors - including
energy - seems
inevitable.**

"The world is moving towards increasing digitisation. It's a good move, it makes things a lot easier."

Main customer, online first, 18-25



Customers are more optimistic about the potential for improved online security moving forward; although the realities of this does also cause concerns

Customers across the the 'online first' and 'online but hesitant' groups already **have experience in the various methods companies use to strengthen their security** (e.g. two-factor authentication).

The **potential for improved online security** in the future is **particularly reassuring for the 'online, but hesitant' group** who often report feeling fearful about their online data.

However, customers do also **often complain about the complexity of accessing certain services** or their **personal accounts** and fear this will only become more advanced as security measures are tightened. For remote carers, while they welcome improved security measures, they fear additional measures across multiple devices **could confuse the person they care for**.

This **gap between security worries** and what **they're willing to do to get online** is indicative of a **say/do gap** but also the realities of low digital confidence.

More prominently however, are concerns about the increased usage of AI in the future

A donut chart with a red border and a white center, representing 69% of the total.

69%

Of respondents are worried about 'the increased use of AI in our government and public services'

A donut chart with a red border and a white center, representing 65% of the total.

65%

Of respondents are worried about 'the increased use of AI in our everyday lives'

Most are aware of the **increasing prevalence and rising usage of AI:**

Most assume that the **primary reason companies are eager to embrace AI technologies is in order to cut costs, rather than to genuinely improve customer experience.**

This raises questions about user experience, as well as larger questions surrounding the reliability and security of such tools.

"[AI] is all greed, it's for money. All they care about is money, they don't care about humans anymore."

Main consumer, online but hesitant, 50-69

The use of chatbots in particular is often met with scepticism and caution

When considering how AI could be used moving forward, **most customers defer to chatbots as being a key tool.**

- Most customers who are online in some capacity **have already come into contact with chatbots in some capacity** when engaging with customer services.
- Most report negative experiences of using them, including:
 - Getting 'stuck' in a circular conversation;
 - Being unable to get the answer they need;
 - Issues with misunderstanding and/or misinterpretation).

Chatbots are therefore a key driver of scepticism towards increased AI usage.

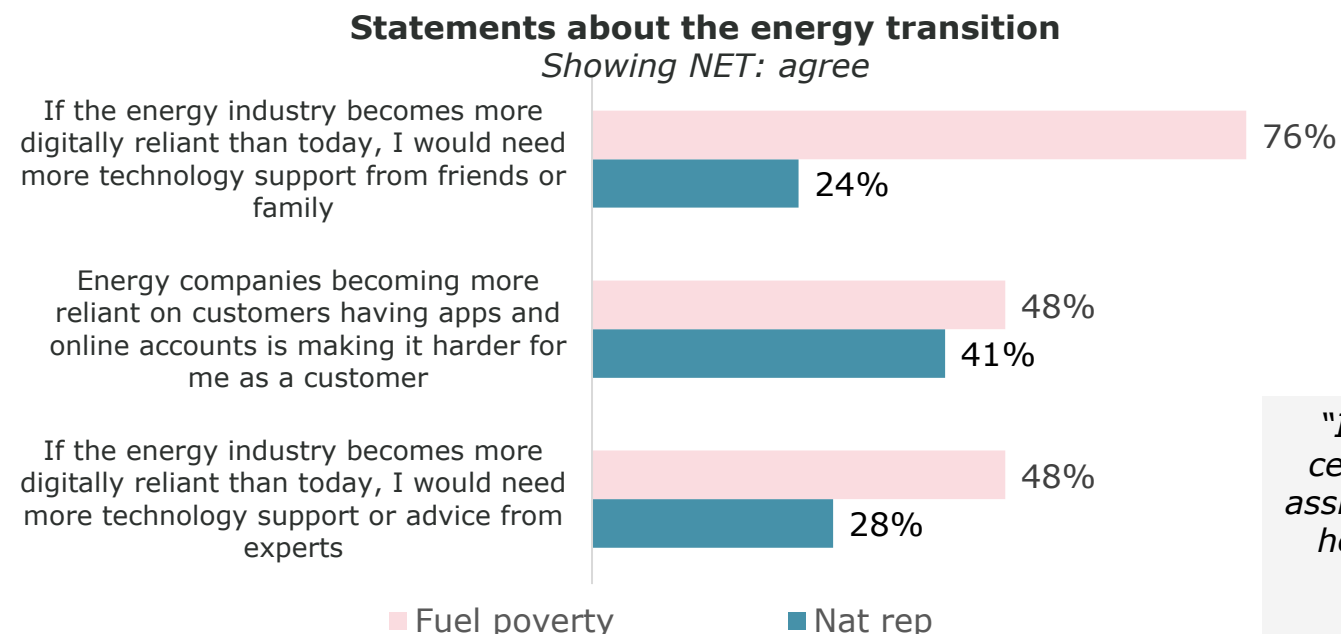
"[Chatbots are] usually frustrating and time consuming as they only answer generic questions rather than specifics that I might need to know."

Main customer, online, but hesitant, 50-69

"My experience isn't very good, You often find yourself going around in circles and then ending the chat due to getting 'stuck'."

Main customer, online, but hesitant, 50-69

Customers recognise the inclusion risk of digital progression in the energy sector – those in **fuel poverty** and the **predominately offline** are especially vulnerable



82%

Of predominantly offline respondents agree with the statement 'if the energy industry becomes more digitally reliant than today, I would need more technology support or advice from somebody (e.g. experts or friends / family)'.

"It is imperative that everyone gets equal treatment, while certain people may be able to use digital technology without assistance or have the understanding. Some people need extra help and it is importance that it should be there for anyone who needs it."

Main customer, online but hesitant, 18-25

More broadly however, are concerns that AI will reshape the skills needed to navigate the online world

81%

Of respondents agree with the statement: 'Those that lack skills in using digital technology are at risk of being left behind'

73%

Of respondents agree with the statement: 'AI puts those who are not confident in using digital technology at risk, as they may not be able to identify when it is being used'

66%

Of respondents agree with the statement: 'AI is changing what skills are required to be online'

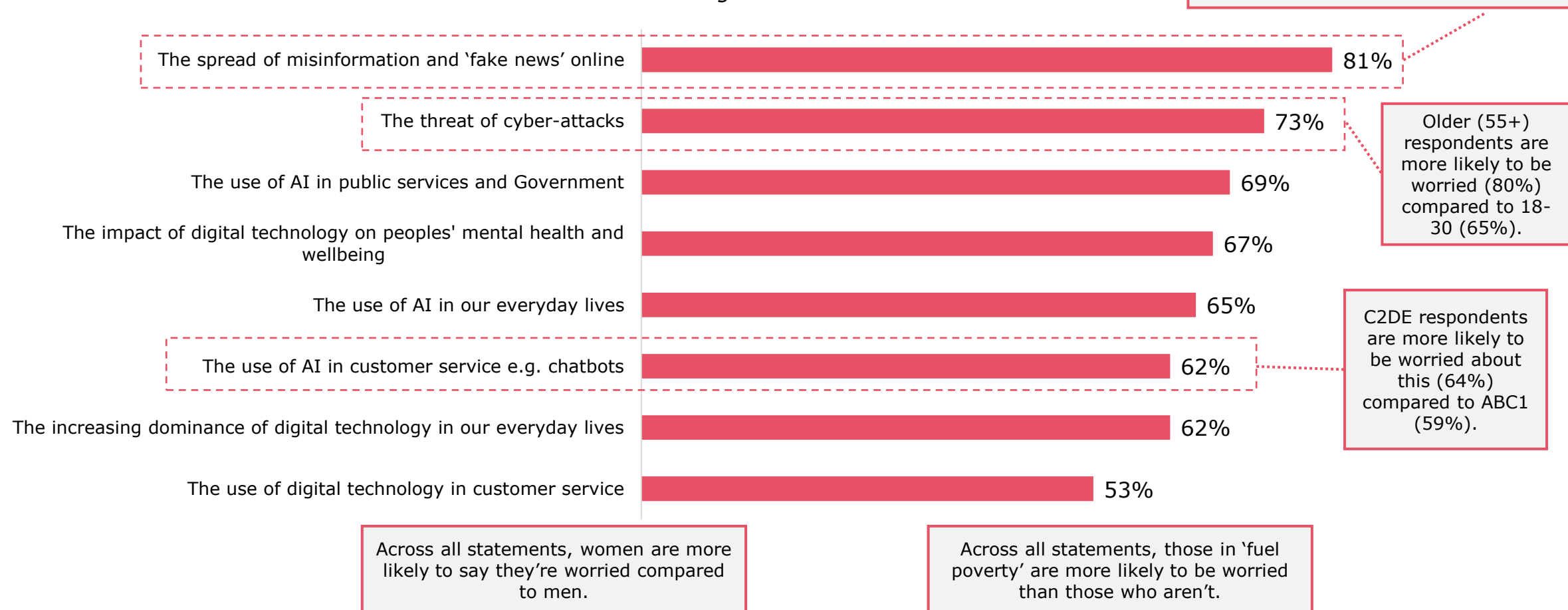
Concerns around the changing digital landscape due to AI are mostly centred around those who are less digitally confident or who are currently offline. This is because AI is perceived to require further knowledge on how to navigate and understand when it is being used.

There are also concerns among those who are 'online, but hesitant'. This sample are more likely to agree that AI puts those not confident at risk given they might not be able to identify what is being used (85%) compared to those who are 'online first' (73%).

Concern is also greater among those in fuel poverty. Most (80%) in the sample feel that AI puts those less confident at risk, and 70% feel that AI is changing the skills needed to be online.

As well as concerns about AI, worries about misinformation and cyber-attacks are prominent

Worries about increasing digital usage Showing NET: worried



Digital in the energy transition



While additional digital reliance is seen as **inevitable for over half of respondents**, this does raise concerns for many about the energy sector

53%

Of respondents agree with the statement 'the energy industry becoming more digitally reliant is a natural progression'

However:

50% of respondents agree with the statement 'If the energy industry becomes more digitally reliant than today, I would be worried about the security of energy systems'. This rises to 60% for those aged 55+.

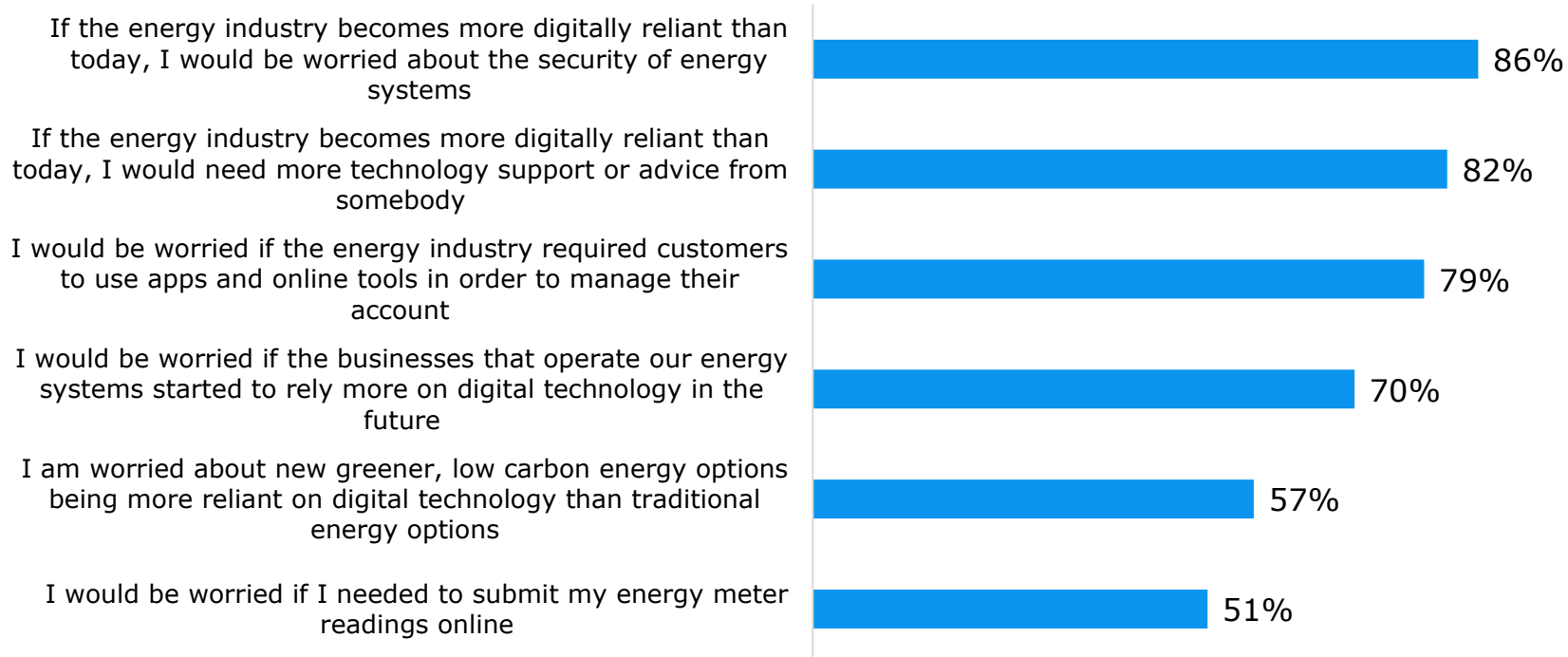
38% of respondents agree with the statement 'I would be worried if the energy industry started to rely more on digital technology in the future'.

30% of respondents agree with the statement 'I am worried about greener, low carbon energy options being more reliant on digital technology than traditional options'.

For those who are **predominantly offline**, concerns about the transition to digital are magnified

Statements about energy systems being digitally reliant

Showing NET: agree
Predominantly offline sample only



Just 3% of the predominantly offline (CATI) sample say they are not worried about 'any of these'.

For all customers, energy information needs to be clear and easy to navigate

63%

Of respondents agree with the statement 'it is important to have a single source of information about new products / services or government subsidies related to the energy transition'.

58%

Of respondents agree with the statement 'it is important to have a single source of information to help me learn about clean / sustainable energy for my home'.

"I think this would be pretty useful. Having all the information you need in one place would be helpful. But it should be in multiple different formats, as different people would like different things. I'd personally use an app or a website."

Main customer, online first, 18-25

In the qualitative phase, customers **respond well to the idea of a 'one-stop shop' for energy information**, particularly those with lower digital confidence.

- Customers like that they would not have to search for information in multiple different places, seeing this as convenient and helpful.
- All customers are happy for such a platform to exist online, although there are some varying preferences towards app vs website:
 - the 'online first' group generally prefer apps, while the other two groups are more likely to opt for a website.
 - All customers mention that an offline format (e.g. a leaflet) should be available for those who can't engage online, but notably, no customer in this sample wanted this format for themselves.

A digital only sustainability strategy would be vulnerable to mistrust and confusion

32%

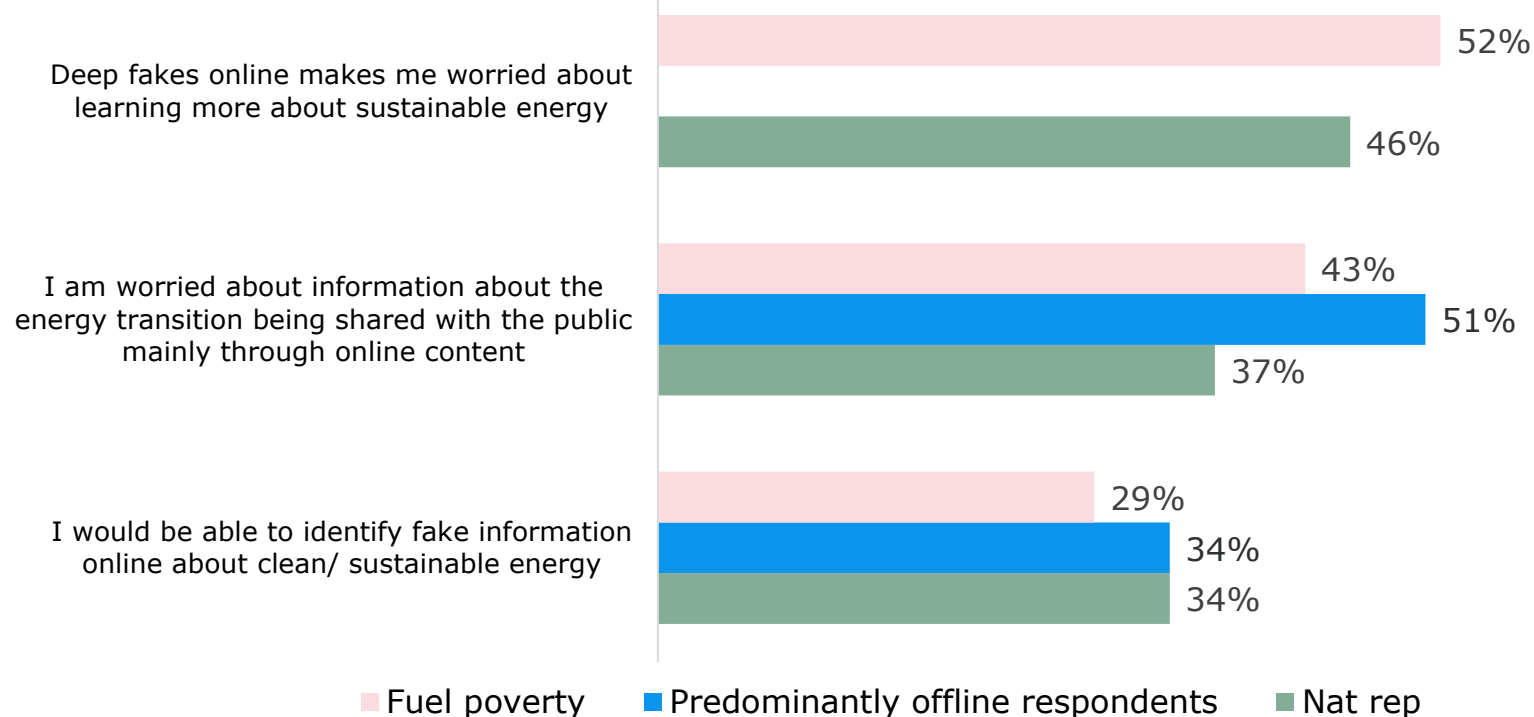
Of respondents agree they are 'already seeing confusing online content about clean / sustainable energy'

92%

Of 'predominantly offline' respondents agree that 'energy companies should do more to support those who are most vulnerable to participate in digital solutions'

Expectations of energy companies

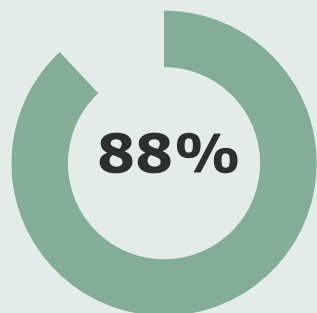
Showing NET: agree



Q13. To what extent do you agree or disagree with the following? Base: All nat rep respondents (n=2,024); all fuel poverty respondents (n=1,092)

Q12. Please tell us your expectations of energy companies in regard to digital technology. Which, if any, do you agree with? Base: all predominantly offline respondents (n=100)

Customers want the choice of offline and online support, with real people available online



Of respondents agree with the statement 'customers should be able to speak to a real person when they contact their energy company'

Expectations of energy companies

Showing NET: agree



Across all statements, those aged 55+ are more likely to agree compared to the total.

Q12. Please tell us your expectations of energy companies in regard to digital technology. To what extent do you agree or disagree with the following? Base: All nat rep respondents (n=2,024); all fuel poverty respondents (n=1,092)

There is also an appetite for human, local engagement alongside digital information

Most customers are unfamiliar with the idea of an energy consultation, but welcome the idea of companies listening to their customers.

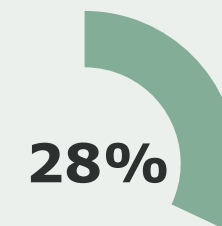
The majority of customers are unaware that consultations exist as a way for customers to have their voice heard on issues that matter to them.

Once informed about these consultations, most are enthusiastic about having a say, particularly on a topic like energy that impacts people's daily lives. Only a minority react negatively to this, feeling sceptical that energy companies would actually listen to what their customers say and wonder if taking part would make any tangible difference.

Amongst predominantly offline respondents...

73%

agree with the statement 'energy companies should have centres or places to meet people face to face in addition to call centres and online channels'.



Of respondents say they would attend a face to face event to learn about clean / sustainable energy.

This rises to **39%** for those who are **predominantly offline**.

Q13. To what extent do you agree or disagree with the following? Base: All nat rep respondents (n=2,024)

Q12. Please tell us your expectations of energy companies in regard to digital technology. Which, if any, do you agree with? Base: all predominantly offline respondents (n=100)

Gas in a digital age



In terms of gas and heating specifically, customers *hope* digital technology could help improve customer services,— but struggle to articulate specifics

When thinking about digital technology in the future (both generally and specifically in the energy market), customers struggle to imagine a radically different world in terms of gas and heating.

They expect apps and smart meters will continue to be key, but otherwise mainly talk in terms of the outcomes they want to see: a safe, reliable service without rising costs.

"The most ideal solution would be that the gas is read remotely and readings are not required. Once this is set up you wouldn't need to worry."

Main customer, online but hesitant, 50-69

"In the best case scenario, using gas at home would be safe, reliable and affordable. I would not have to worry about high costs or my heating not working. Everything would be simple to manage and I would feel in control of my energy use without stress."

Main customer, online but hesitant, 50-69

When prompted, there is support for digitisation to solve real problems in the gas industry



Of respondents agree with the statement 'Investing in digital technology is an effective way for gas networks to save money'

Attitudes towards digital technology and gas networks

Showing NET: agree



This rises to 80% for predominantly offline respondents.

Q15. To what extent do you agree or disagree with these statements? Base: All nat rep respondents (n=2,024); predominantly offline respondents (n=100)

Customers also have strong expectations of support

Offer simple, clear guidance...

"I think if, something's going digital, I think there should be somewhere I could go and sit and do it with someone and get the understanding [of how to use it]."

Main customer, online but hesitant, 70+

Provide real human support...

"There are some people that just won't [know how to use digital tools]. Maybe give them a free laptop and perhaps have somebody come around and show them how it works, and, and try and build their confidence into going online."

Main customer, online but hesitant, 50-69

Keep non-digital channel available...

"I would prefer a mix of communication methods. simple options like phone calls and letters are important for me."

Main customer, online but hesitant, 50-69



There is a developing opportunity for gas companies to create a digital conscience to support customers moving forward

This would mean:

Making services as accessible as possible, including having human support and making security features clear

89% agree that customers should be able to speak to a real person when they contact their energy company

Supporting those that lack technical skills, including providing tutorials

80% agree that those that lack skills in using digital technology are at risk of being left behind

Providing offline alternatives

75% agree that companies and organisations should do a better job of providing offline services in order to cater for those who are not online/ not confident in using digital tools

Q10. Below are a number of statements about changing digital technology. To what extent do you agree or disagree with each? Base: All nat rep respondents (n=2,024)

Q12. Please tell us your expectations of energy companies in regard to digital technology. To what extent do you agree or disagree with the following? Base: All nat rep respondents (n=2,024)

Experts further highlight the opportunity for digitisation to benefit customers

1. Accessible accounts

One way that digitalisation could benefit customers is by making it easier for those who support someone to access accounts (e.g. increased fingerprints/face technology) could make a big difference for carers.

2. Joining support across utilities

For example, digitising the PSR, to help join support across utilities.

3. Proactively providing support

To ensure that all audiences continue to be catered to experts feel that the utilities sector, particularly the electricity sector, will need to be prepared to be more proactive in the support they provide to the less digitally confident and capable.

E.g. ways to reach digitally disengaged should devices they use for healthcare experience an outage

Experts emphasise that simplicity and inclusivity are the most important factors in digital communication going forward.

Appendix



Definitions of sub-groups



Online first

Qual: Generated based on all qualitative responses which indicated high levels of comfort and confidence in using online tools.

Quant: Defined as those answering 'extremely confident' or 'confident' to the question 'How would you describe your level of digital confidence?'



Online, but hesitant

Qual: Generated based on all qualitative responses which indicated low levels of comfort and confidence in using online tools, despite being online.

Quant: Defined as those answering 'not confident' or 'not at all confident' to the question 'How would you describe your level of digital confidence?'



Predominantly offline

Qual: Generated based on all qualitative responses which indicated no/limited access to online tools, very low comfort and confidence. For some also included unwillingness to engage.

Quant: Answering 4 or less to question OR 'none of these' to the question 'Thinking about your online activity, which of the following would you currently do online?*'

**Answer options: Online banking or paying bills online; Pay online for your council tax or for another local council service; Look online for public services information on government sites; Finding / downloading information for work / business / school / college / university; Look at job opportunities or apply for a job online; Find information for your leisure time including cinema, live music, theatre, museums; Complete government processes online; Sign an online petition or use a campaigning website; Use streamed audio services; Listen to live, catch-up or on-demand radio through a website or app; Watch TV programmes/ films/ content online; Watch or post livestream videos; Pay energy bills*

Definitions of sub-groups



Remote carers

Qual: Answered 'yes' to 'Are you currently providing informal care or support to a family member who you do not live with?' and reported to deliver remote or occasional in-person care (defined as once a week or less), as opposed to regular in-person care.

Quant: Defined as those who answered 'yes' to the following: 'I have a caring role for another adult (e.g. an adult child, a parent, a partner) who does live with me' OR 'I have a caring role for another adult (e.g. an adult child, a parent, a partner) who does not live with me'.



Those in fuel poverty

Qual: Answer to the following question indicates more than 10% of annual household income is spent on fuel; *'Approximately how much do you spend on home energy each year, that is electricity and mains gas (if you have it)? You can answer per year, per quarter, per month or per week, but this should be on average across the whole year, including the winter'*. Recruiter to calculate % of annual household income spent on energy bill.

- Quant: Defined as those who:
 - Have less than £373 per week after paying rent/mortgage
 - Would be extremely or very worried if their energy bill came in twice as much as expected
 - Have ever avoided topping up their gas or electricity meter to make sure they had money for necessities (if on a meter)



Thank you

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