

# 0110 SSEN ED3 Priorities Research

Quantitative report

Prepared by Create Clarity

The logo for Scottish & Southern Electricity Networks, consisting of a stylized white wave icon to the left of the text "Scottish & Southern Electricity Networks" in a sans-serif font.

Scottish & Southern  
Electricity Networks



- 01 Summary and key takeaways
- 02 Background and objectives
- 03 Methodology
- 04 Importance of 8 priority areas
- 05 Importance of 39 sub-priority areas
- 06 Importance of social impact areas
- 07 Affordability
- 08 Awareness/views on SSEN & relationship with electricity

# Contents

The background image shows two utility workers in high-visibility orange and yellow safety gear, including hard hats and harnesses, working on a wooden utility pole. One worker is positioned higher on the pole, and the other is lower. A yellow warning sign is attached to the pole, featuring a lightning bolt and a horse icon, with the text 'DANGER OF DEATH KEEP OFF'. A semi-transparent red banner with white text is overlaid across the middle of the image.

# 01 Summary and key takeaways

# State of the nation. Context to customers' changing priorities throughout ED2 to date

## ➔ CONSISTENT HIGH PLATEAU

- Delivering a reliable network
- Keeping employees and customers safe

## ➔ PEAK

- Delivering value for money
- Supporting vulnerable customers (driven by COL)

## ➔ NEXT PEAK

- Building a resilient network

## ➔ MID PLATEAU

- Providing high quality customer service
- Operating a smarter, more secure network

## ➔ VARIABLE GROUND

- Direct environmental impact
- Net zero

## 🗺️ LESS EXPLORED

- Making new connections easier and faster
- Driving local economic growth

# Key headlines (quantitative findings)

## OVERALL 8 PRIORITY AREAS RANKED IN FIRST PLACE

	Total	Domestic	Business
Building a reliable and resilient network	28%	28%	33%
Delivering value for money services	26%	26%	20%
Supporting customers in vulnerable situations	13%	13%	13%
Providing high-quality customer service	10%	9%	11%
Minimising SSEN's direct environmental impact	8%	8%	8%
Operating a smarter, more secure network	7%	7%	7%
Driving local economic growth	5%	4%	7%
Making new connections easier and faster	4%	4%	3%

## TOP 10 SUB-PRIORITY AREAS RANKING

	Total	Domestic	Business
Helping bring down bills in the long term	10.1%	10.3%	8.3%
Making our network more resilient	6.5%	6.4%	7.2%
Planning for the long term	5.0%	5.1%	4.0%
Preparing for extreme weather	4.6%	4.7%	3.5%
Minimising the frequency of power cuts where possible	4.4%	4.4%	4.4%
Improving network efficiency	4.2%	4.1%	4.6%
Providing extra support during storms	4.0%	4.1%	3.8%
Providing targeted support for our most vulnerable customers	3.8%	3.9%	3.3%
Minimising the duration of power cuts when they happen	3.3%	3.3%	3.3%
Supporting energy efficiency schemes	3.2%	3.3%	2.7%



Building a reliable and resilient network



Delivering value for money services



Supporting customers in vulnerable situations



Providing high-quality customer service



Minimising SSEN's direct environmental impact



Operating a Smarter, More Secure Network



Driving local economic growth



Making new connections easier and faster

Key to different sub-priority area colours

# Executive summary – What are customers priorities?

## IMPORTANCE OF 8 PRIORITY AREAS

Initial qualitative research confirmed that no new priority areas have emerged since the development of the ED2 Business Plan.

The two most important priorities for both domestic and business customers are **reliability and resilience** (ranked first by 28%) and **value for money** (ranked first by 26%). This is unsurprising given the growing reliance on electricity in daily life and the ongoing impact of the cost-of-living crisis.

Customers who struggle to pay their bills place significantly greater importance on value for money and support for vulnerable customers compared to those who pay without difficulty.

The priority order is broadly consistent with that observed in 2020 during ED2 business planning, though at that time value for money was slightly ahead of reliability and resilience.

Customers expect these priorities to become **even more significant in the future**, driven by rising living costs, increasing electricity demand, and the effects of extreme weather.

Secondary priorities include supporting vulnerable customers (13% ranked first), customer service (10%), and environmental impact (8%). These areas, while less dominant, still represent important considerations for the overall business plan.

### What to do:

- Ensure business planning is framed around reliability/resilience and value for money.
- Prioritise initiatives and commitments that strengthen these objectives.
- Address sub-priorities within these areas, alongside measures to support vulnerable customers.

# Executive summary – What commitments should SSEN focus on?

## IMPORTANCE OF 39 SUB-PRIORITY AREAS

**Helping to bring down bills in the long term, improving network resilience, planning for the long term and preparing for extreme weather are viewed as critical priorities for SSEN**, and areas that will deliver strong benefits for communities.

Other areas considered highly important, particularly for community benefit, include minimising the duration and frequency of power cuts, supporting vulnerable customers, and developing nature-based solutions.

A smaller number of initiatives, such as accelerating new electricity connections and enabling customer participation in flexibility schemes, are perceived to offer high community benefits, although ranked as lower overall priorities for SSEN.

### **What to do:**

- Make **long-term affordability** a central principle of the business plan and reference it in customer communications.
- Identify opportunities for **network efficiencies** to reduce costs.
- Focus on **resilience initiatives** that ensure continuous supply, such as preparing for extreme weather and reducing outage frequency and duration.
- Review strategies for supporting vulnerable customers and explore partnerships for energy efficiency schemes.

# Executive summary

## IMPORTANCE OF SOCIAL IMPACT AREAS

In terms of social impact, customers place the greatest importance on early investment **to futureproof the network for low carbon technologies** (35% ranked first). This is followed by extra value through biodiversity initiatives (25%) and community partnerships, such as working with schools (24%). A net zero fund ranks lowest in importance (16%). This is relatively consistent across domestic and business customers, and by region.

### What to do:

- When communicating social impact, emphasise the areas customers value most.
- Frame net zero initiatives around direct customer benefits, such as efficiency and resilience, rather than carbon reduction alone, to avoid disengaging climate-sceptical customers.
- Qualitative research identified that customers appreciate that investment in the network is necessary and that this may cause some disruption. While they are understanding of this, they would like SSEN to work more closely with communities to minimise any inconvenience.

## AFFORDABILITY

**Affordability remains a significant challenge**, particularly for domestic customers. Forty-five percent report struggling to pay their bills at least occasionally (47% domestic vs. 26% business), and 17% lack confidence in their future ability to pay (18% domestic vs. 5% business).

### What to do:

- Communicate with sensitivity around costs. Focus on value, fairness, and tangible benefits.
- Position investment as essential for long term reliability and high service standards (e.g. investment in infrastructure and maintenance).
- Highlight affordability as a key priority of the plan.

## AWARENESS/VIEWS ON SSEN & RELATIONSHIP WITH ELECTRICITY

Awareness of SSEN is relatively high, with 80% of customers having heard of the company (79% domestic vs. 88% business), though most lack detailed knowledge of its role (less than one in ten know them very well). There is strong interest in receiving information about the business plan (51% yes, 44% maybe), and while adoption of low carbon technologies remains low, future appetite, particularly for electric vehicles and solar panels, is evident.

### What to do:

- Increase awareness of SSEN's role by communicating the business plan in a clear, concise, and accessible manner.
- Consider commitments that will support customers' adoption of LCT.

The section header '02 Background and objectives' is centered in a yellow horizontal band. The number '02' is enclosed in a white circle, and the text 'Background and objectives' is in a white sans-serif font. The background of the slide is a photograph of high-voltage power lines stretching across a mountainous landscape with patches of snow under a cloudy sky.

## 02 Background and objectives

# Background

SSEN is at a pivotal stage in its strategic planning and is developing a robust business plan for the next regulatory period, RIIO-ED3, starting in 2028.

Developing the plan is anchored in **a long-term vision to deliver an efficient transformation for customers today and tomorrow, delivering economic growth and helping lower bills in the future.**

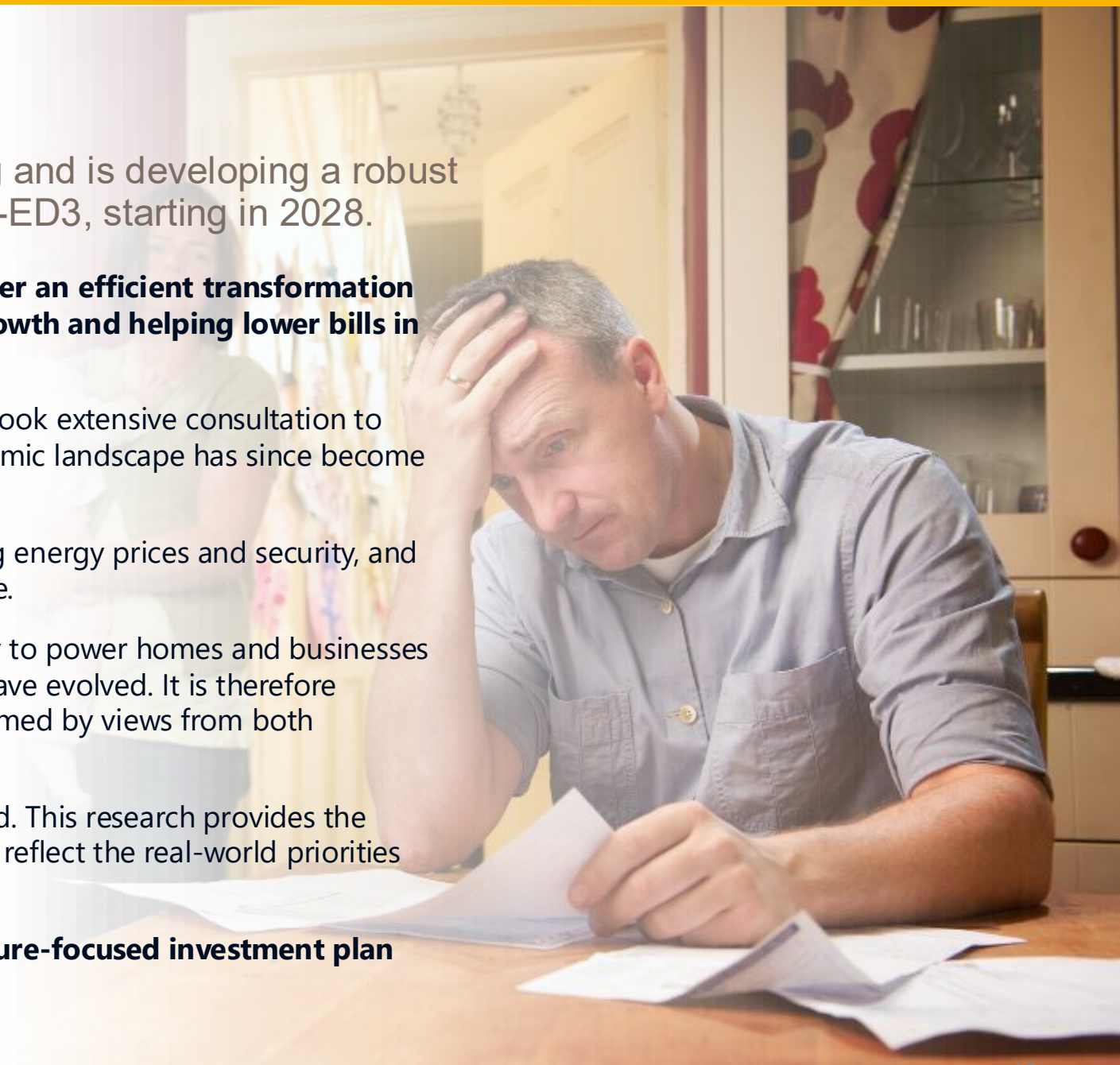
During the last business planning cycle (RIIO-ED2), SSEN undertook extensive consultation to understand customers' priorities. However, the social and economic landscape has since become increasingly complex.

Ongoing cost of living challenges, geopolitical conflicts affecting energy prices and security, and the difficult transition to cleaner, greener energy all add pressure.

While people's fundamental need for a reliable electricity supply to power homes and businesses remains the same, customers' expectations and priorities may have evolved. It is therefore essential that the development of the ED3 business plan is informed by views from both household and business customers.

To achieve this a comprehensive research programme is required. This research provides the evidence base to ensure that investment decisions for RIIO-ED3 reflect the real-world priorities and preferences of the customers SSEN serves.

**These insights will enable SSEN to build a customer-led, future-focused investment plan that balances reliability, affordability, and sustainability.**



# Key considerations

SSEN has identified several considerations for the business planning process, including the following trends:

1

**Greater government direction:** More centralised energy planning could improve network upgrades, but growing electricity reliance may increase outage risks for customers, especially the vulnerable.

2

**Increased climate risk:** More extreme weather is already disrupting power supply, increasing the need for a more resilient network to protect customers.

3

**Population change:** An ageing population and rising medical needs mean more customers may require tailored support, while workforce shortages could slow delivery of upgrades.

4

**Technological automation:** New technologies will improve service and efficiency for customers but also raise expectations and require careful planning to manage new energy demands.

5

**Legitimacy, affordability and social licence:** Customers expect affordable, sustainable energy and greater accountability, making trust, fairness, and community impact more important than ever.

6

**Growing supply chain challenges:** Delays in materials and equipment may slow network upgrades, affecting service reliability and timing for customers.

7

**Increasing consumer participation:** As more people adopt green technologies, ensuring fair access and maintaining reliable, high-quality power becomes increasingly important—especially for vulnerable customers.

# Research objectives

01 Identify any new thematic priorities that have emerged since the current priorities were established in 2020.

02 Understand customers' high-level priorities, needs, and future expectations of SSEN to help shape the ED3 business plan.

03 Evaluate customer preferences and perceived value across activities within each high-level priority, to inform potential ED3 plan commitments.

04 Establish a baseline understanding of affordability concerns, while identifying the outputs most likely to drive stronger perceptions of value for money.

05 Design the research to support a longitudinal programme, enabling recontact with the initial cohort to gather iterative and informed insights over time.

# Achieving research objectives

To achieve the objectives, the research was designed to:



## **Provide insights from a representative sample of SSEN customers**

We collected insights from a diverse and representative range of household and business customers, including those who are typically seldom heard. This involved collecting views from both of SSEN's regions, which differ geographically, demographically and firmographically, and face unique challenges.



## **Use materials and a process that is inclusive and easily understood**

Many people may be unfamiliar with SSEN and its role, so we provided clear explanations and context throughout the research process.

Given the volume of information to test around priorities, we used rotational techniques and gamification to maximise insight and engagement.



## **Use a best practice approach to identify customer priorities**

The research explored existing customer priorities in depth while also taking a forward-looking approach.

The qualitative research has helped to validate existing priorities and identify emerging expectations for ED3, while the quantitative research has enabled us to test the importance of these priorities across the wider customer base.



## **Provide actionable insight that contributes to SSEN's ongoing evidence collection**

Through careful research design and high-quality deliverables, we have ensured the research provides robust and actionable evidence that informs SSEN's business planning. This work forms part of ongoing stakeholder engagement, and we will draw on relevant evidence throughout both the research design and the interpretation of insights.

The section header '03 Methodology' is positioned on the left side of the image. The number '03' is enclosed in a white circle, and the word 'Methodology' is written in a white, bold, sans-serif font. This text is overlaid on a semi-transparent orange horizontal bar that spans across the middle of the image.

## 03 Methodology



# Overview of approach



## 1. UNDERSTANDING THE LANDSCAPE



**Project initiation meeting** confirmed the overall approach and integrated existing evidence.



**Qualitative engagement** to explore reactions to current priorities and uncover emerging issues (6 x 90-minute group sessions).



**Activation workshop with SSEN** to review qualitative findings and agree final priorities for quantitative testing.

## 2. CONFIRMING CUSTOMER PRIORITIES



**Quantitative research** identified customer priorities and assessed the perceived value of specific activities within each high-level area, helping to shape potential ED3 plan commitments.



**Activation workshops** focused on each emerging priority area will review results and determine which elements to carry forward into ED3 commitments.



**Creation of research cohorts** to support continued engagement as the business plan evolves.

## 3. INSPIRING ACTION

# Qualitative research – who we spoke to

We held online focus groups with households and businesses to explore how they perceive and understand the current and high-level ED3 priorities, and to identify any new or emerging ones.



**Rural household customers (8)**



**Urban household customers (8)**



**Future household customers (8)**



**Hard-to-reach households (8)**



**SMEs (7)**



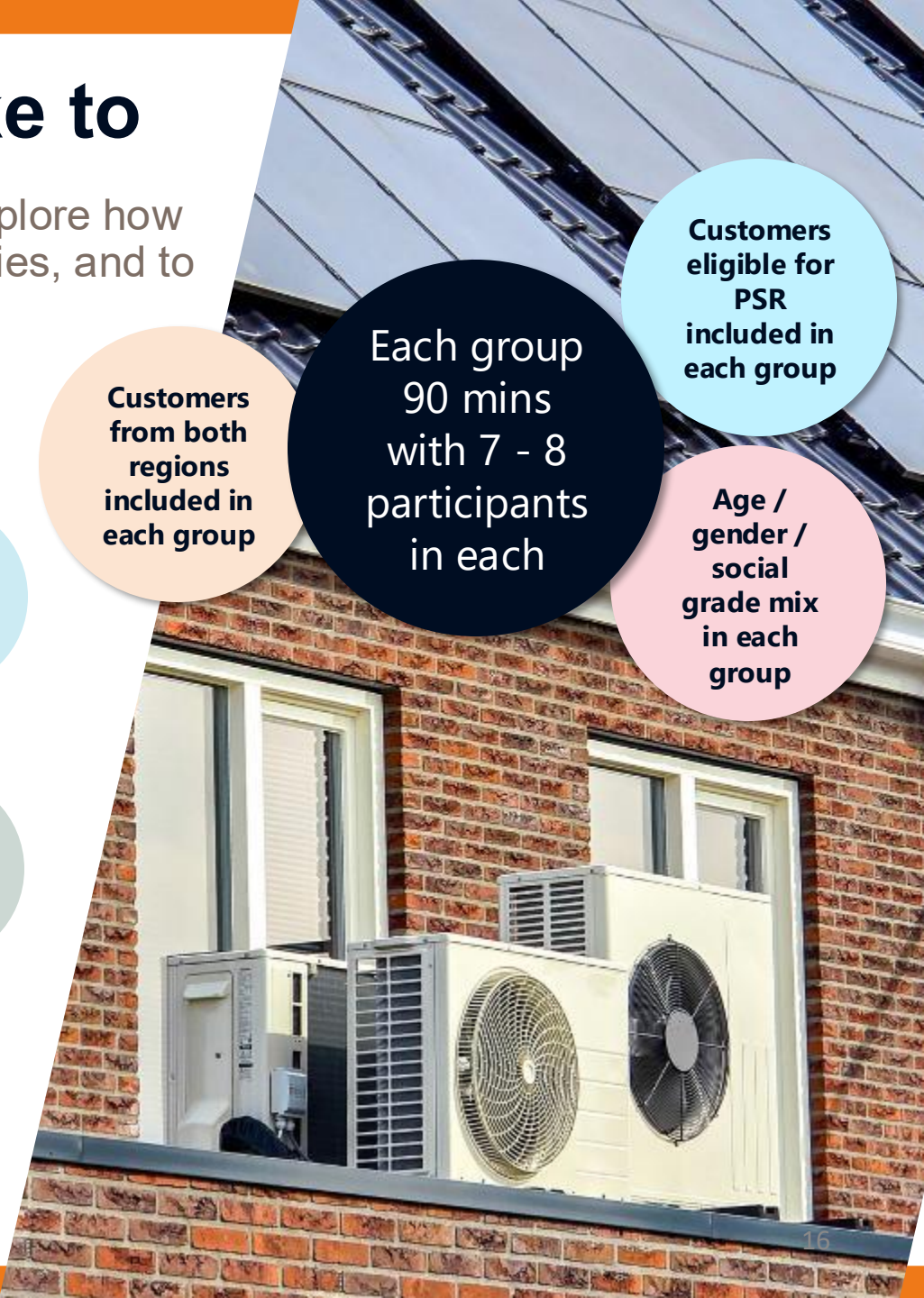
**LCT adopter households (7)**

Customers from both regions included in each group

Each group 90 mins with 7 - 8 participants in each

Customers eligible for PSR included in each group

Age / gender / social grade mix in each group



# Qualitative research – Key findings

This engagement provided valuable insight into customer expectations, priorities, and concerns.

## **Across all groups, customers agreed that energy bills have risen significantly in recent years.**

Many find bills unaffordable, and even those currently managing costs acknowledge that changes in circumstances could affect their ability to pay. Rising bills remain a major concern, particularly for domestic customers. Despite this, most participants believe SSEN offers good value for money, especially when shown a breakdown of their bill, although they recognise SSEN has limited influence over the total cost of energy.

- ✓ To improve understanding, the quantitative survey should include a more detailed breakdown of bill components, with additional context for business customers.

## **Overall, customers perceive SSEN as performing well (reliability), with many unable to recall their last power cut.**

### **To maintain trust, customers expect utility companies to:**

- ✓ Deliver great service at a fair price
- ✓ Get the basics right, informed by ongoing customer feedback
- ✓ Act responsibly and “do the right thing”

## **Customers understand that network investment is necessary but want SSEN to work closely with communities to minimise inconvenience.**

# Qualitative research – Key findings

## Quantitative implications



No new overarching priorities emerged; the existing framework feels comprehensive, with strong consensus on rankings.



**Reliability** was the top priority for most customers, followed by value for money. Reliability and resilience are critical and are viewed as closely interconnected. Customers are satisfied with SSEN's performance in terms of reliability and resilience but expect them to become even more important in the future.



Some areas required additional explanation for quantitative testing.

# Who we spoke to in the quantitative research

An online survey with households and businesses was conducted to explore their perceptions of the high-level ED3 priorities and understand which they feel are most important.

**2200**  
Total  
customers

**2000**  
domestic

**200**  
business

## Sample definition



### DOMESTIC CUSTOMERS:

- Aged 16+
- Live in qualified postcodes within SSEN's north of Scotland licence area or central Southern England licence area.
- Responsible (jointly or solely) for the household's energy bills
- Included future customers – younger customers who are not currently bill payers but may become so in ED3

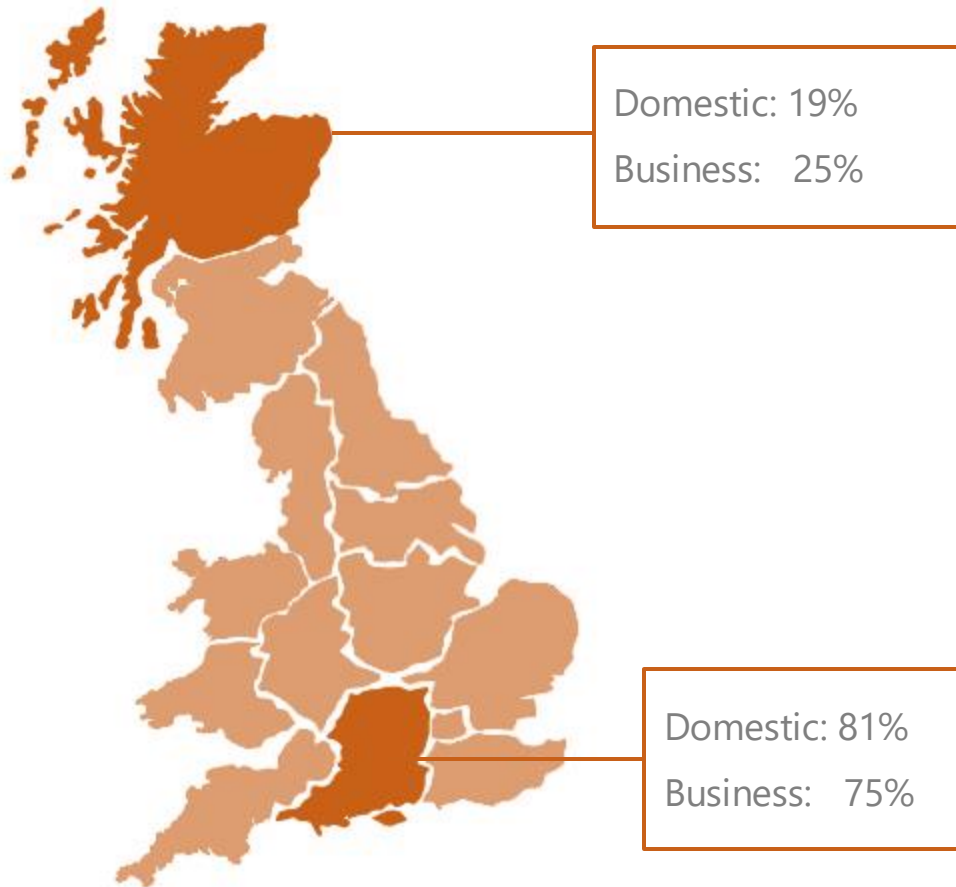


### BUSINESS CUSTOMERS:

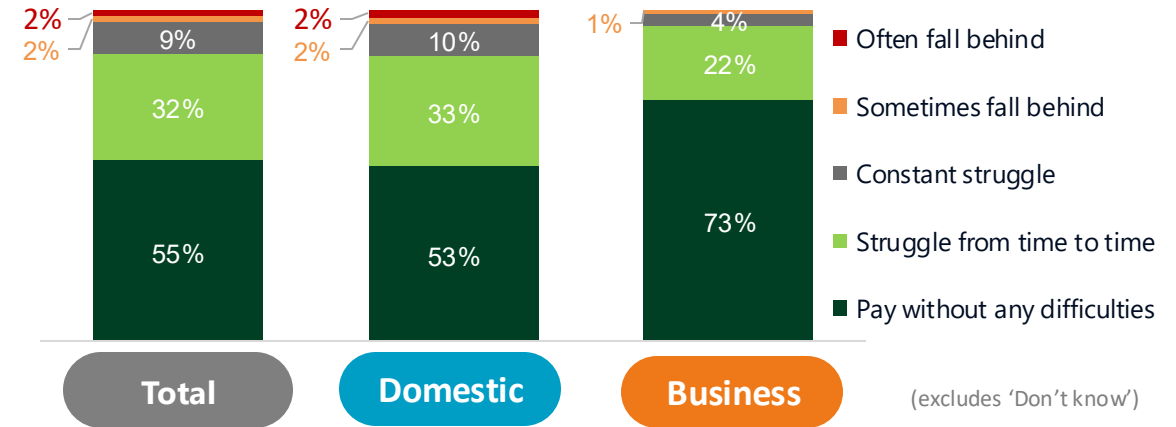
- Work full or part time
- Work at a qualified postcode within SSEN licence areas
- Have separate business premises to their home
- Responsible (jointly or solely) for the business electricity bills.

# Our sample included a good mix of region and ability to pay

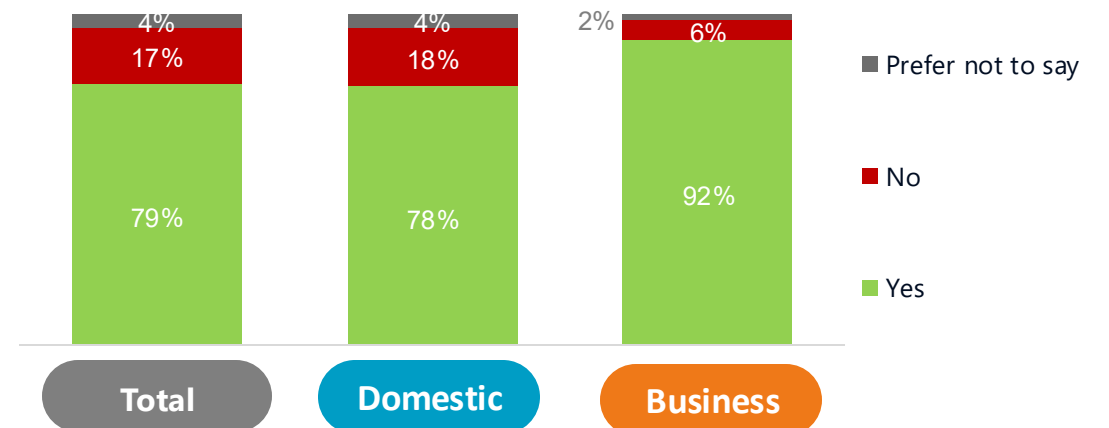
## REGION



## ABILITY TO PAY BILLS CURRENTLY



## WHETHER CONFIDENT CAN PAY BILLS IN NEXT 12 MONTHS



C6. What actions have you taken in the past year to try and meet your energy bills and other costs of living?

Total sample excl DK: 2173, Domestic excl DK: 1984, Business excl DK: 189

C7. Are you confident that you will be able to pay for your [NHH: business'] bills in the next twelve months without needing to make further changes?

Total sample: 2200, Domestic: 2000; Business: 200



# 04 Importance of 8 priority areas



# Importance of 8 priority areas

Customers were shown an overview of the 8 priority areas and asked to rank them in importance

“Please rank the following potential investment areas from 1-8 (where 1 is the most important) to indicate which you feel are the most important for SSEN to focus on. Please note, just because something is ranked as less important, we understand that this still may be important to you. We just want to understand which things you think should come first.”

## Delivering value for money services

Delivering value for money services, improving our network now so we can meet the current and future needs of customers’ and communities.

## Driving local economic growth

Powering local opportunities, by ensuring our network is ready to connect projects (e.g. new housing developments), and by providing local jobs, apprenticeships and growth opportunities for local businesses through our supply chains.

## Supporting customers in vulnerable situations

Further targeting our support of customers in vulnerable situations – for example, additional help for those who rely on electrically powered medical equipment in the event of a power cut.

## Building a reliable and resilient network

Investing now in a network that is safe, reliable and resilient to external threats and severe weather events, so our communities can rely on our services in the long-term.

## Minimising SSEN’s direct environmental impact

Taking active steps to reduce our impact on the environment, both in our day-to-day operations and when carrying out work in local communities. This means cutting vehicle emissions, preventing oil leaks, and ensuring sites are left in good condition.

## Operating a smarter, more secure network

Making our network smarter, safer, and fairer for everyone by introducing new flexible energy services, being more open with our data in a responsible way and upgrading older systems so they’re ready for a modern age.

## Providing high-quality customer service

Improve delivery of a high-quality personalised customer experience that is responsive, transparent and accessible to all, through digital and non-digital approaches.

## Making new connections easier and faster

Ensuring all our customers, from homes to large businesses, get access to the power they need, whether it’s a new connection or an upgrade, by making the process smooth, quick, and tailored to customer needs.

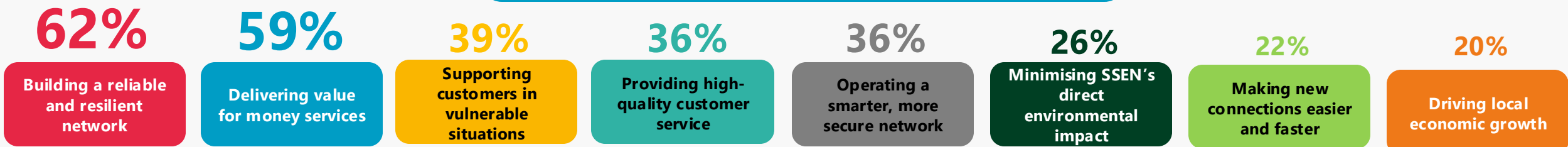
# Importance of 8 priority areas

Reliability / resilience and value for money are the most important priorities by far.

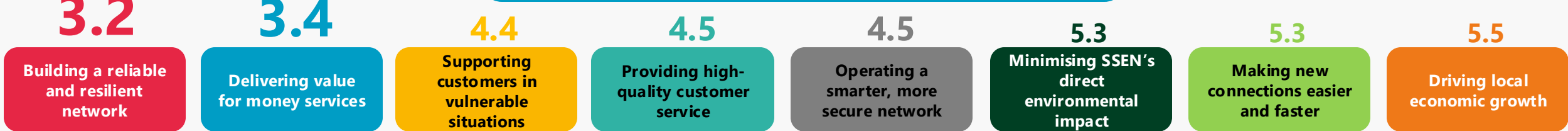
## Overall priority area ranked in first place



## Priority areas ranked in top three



## Mean ranking for each priority area (1 to 8)



R1. Please rank the following potential investment areas from 1-8 (where 1 is the most important) to indicate which you feel are the most important for SSEN to focus on. Please note, just because something is ranked as less important, we understand that this still may be important to you. We just want to understand which things you think should come first. Total sample: 2,200. [Data tables](#)

# Importance of 8 priority areas

While the top two priorities are the same for domestic and business customers, a reliable / resilient network is even more important to business customers. There are no differences by region on priorities.



## Domestic

	Building a reliable and resilient network	Delivering value for money services	Supporting customers in vulnerable situations	Providing high-quality customer service	Minimising SSEN's direct environmental impact	Operating a smarter, more secure network	Driving local economic growth	Making new connections easier and faster
Ranked in <b>first</b> place	28%	26%	13%	9%	8%	7%	4%	4%
<b>Mean</b> ranking (1 – 8)	3.2	3.3	4.4	4.5	5.3	4.5	5.5	5.3

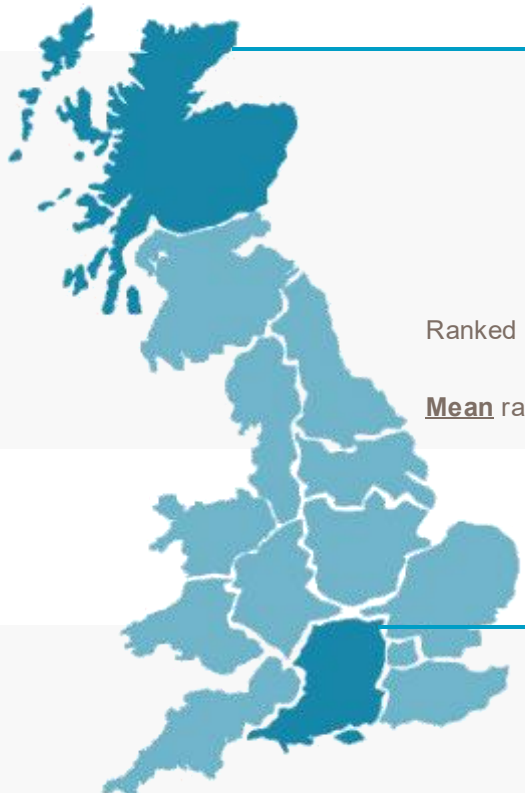
## Business

	Building a reliable and resilient network	Delivering value for money services	Providing high-quality customer service	Supporting customers in vulnerable situations	Operating a smarter, more secure network	Minimising SSEN's direct environmental impact	Driving local economic growth	Making new connections easier and faster
Ranked in <b>first</b> place	33%	20%	13%	11%	8%	7%	7%	3%
<b>Mean</b> ranking (1 – 8)	3.2	3.7	4.5	4.7	4.4	5.1	5.0	5.3

R1. Please rank the following potential investment areas from 1-8 (where 1 is the most important) to indicate which you feel are the most important for SSEN to focus on. Please note, just because something is ranked as less important, we understand that this still may be important to you. We just want to understand which things you think should come first.  
 Domestic: 2,000, Business: 200. Differences between domestic and business customers not significant. [Data tables](#)

# Importance of 8 priority areas

There are no differences by region on priorities.



## Scotland

	Building a reliable and resilient network	Delivering value for money services	Supporting customers in vulnerable situations	Providing high-quality customer service	Operating a smarter, more secure network	Minimising SSEN's direct environmental impact	Driving local economic growth	Making new connections easier and faster
Ranked in <b>first</b> place	27%	26%	12%	10%	8%	8%	5%	4%
<b>Mean</b> ranking (1 – 8)	3.2	3.5	4.3	4.5	4.5	5.3	5.4	5.2

## South

	Building a reliable and resilient network	Delivering value for money services	Supporting customers in vulnerable situations	Providing high-quality customer service	Minimising SSEN's direct environmental impact	Operating a smarter, more secure network	Driving local economic growth	Making new connections easier and faster
Ranked in <b>first</b> place	28%	26%	13%	9%	8%	7%	5%	4%
<b>Mean</b> ranking (1 – 8)	3.2	3.3	4.4	4.5	5.2	4.5	5.5	5.3

R1. Please rank the following potential investment areas from 1-8 (where 1 is the most important) to indicate which you feel are the most important for SSEN to focus on. Please note, just because something is ranked as less important, we understand that this still may be important to you. We just want to understand which things you think should come first.

# Importance of 8 priority areas

Customers who struggle to pay their bills place significantly greater importance on value for money and support for vulnerable customers compared to those who pay without difficulty.



By bill paying

## Pay bills without difficulty

Ranked in first place



## Pay bills with difficulty

Ranked in first place



R1. Please rank the following potential investment areas from 1-8 (where 1 is the most important) to indicate which you feel are the most important for SSEN to focus on. Please note, just because something is ranked as less important, we understand that this still may be important to you. We just want to understand which things you think should come first.

C5. Which one of the following statements best describes your [ NHH: IF NOT 1 AT SQ7 (SOLE TRADER): organisation's] situation with paying your energy bill?

Base: Pay bills without difficulty 1271, pay bills with difficulty 902 [Data tables](#)

↑ Significantly higher


↓ Significantly lower

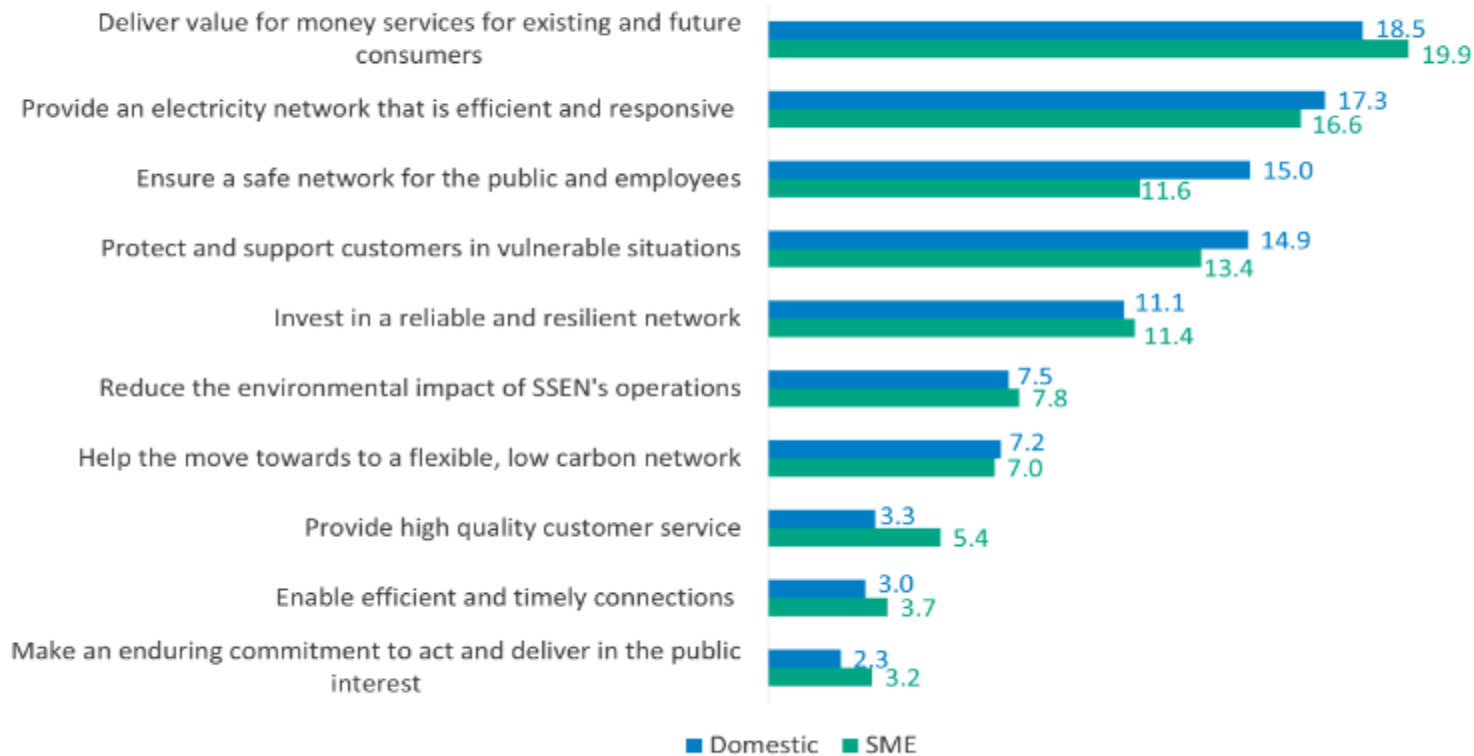
# Importance of 8 priority areas

The priority order is fairly consistent with that observed in 2020, during ED2 business planning, though reliability is now just ahead of value for money.



2020 context

When ranking priorities overall, delivering a value for money service is top for both domestic and SME consumers, followed by efficiency and safety 



Overall priorities

Q21 Which of the following is most and least important to you and your community? Base: Domestic (1,816), SME (215).

11/17/2025

Produced by Impact Research Ltd

# The two most highly ranked priorities are:

**Building a reliable  
and resilient  
network**

**62%**  
ranked in top 3

**Delivering value for  
money services**

**59%**  
ranked in top 3

We asked customers why:

*Why did you choose this  
as the most important?*

# The fact that electricity is so fundamental to our lives and the impact of the cost-of-living crisis are key themes

## Building a reliable and resilient network

"Long power cuts in bad weather aren't good so it's useful to know that the network can cope with poor weather so that we don't get power cuts" **Domestic**

"It's important for every business to have stable electricity as this is a key growth driver" **Business**

"This is essential in the north of Scotland as the weather has a tendency to be extreme at times." **Business**

"If anything goes wrong with the network then we are all at a loss. So that is most important" **Domestic**

"Because everything relies upon electricity. We need it to be stable and available 24/7" **Domestic**

"There are individuals that would struggle greatly without electricity for a long period of time" **Business**

## Delivering value for money services

"As the cost of living is still rising and people cannot afford to heat their houses" **Business**

"Cost of living is really impacting people at the moment so anything to save money would help" **Domestic**

"As a small business we need to be able to afford to keep it open, higher energy costs are making this more difficult" **Domestic**

"No one wants to see money wasted" **Domestic**

"Because it's far too expensive at present" **Domestic**

"Money is having to be stretched so far now and people are having to make hard decisions. Knowing that our money is providing exactly what's needed at a fair cost is paramount" **Domestic**

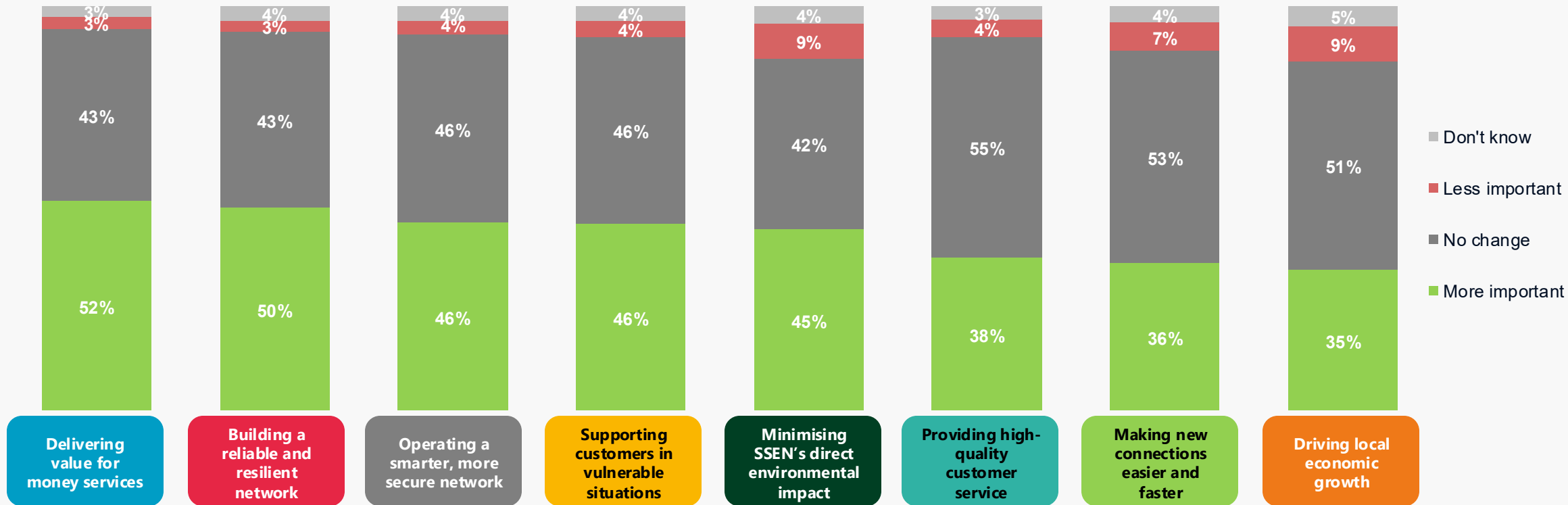
"Energy bills are very high right now and consumers need to know that they are getting the best value for money." **Domestic**

# Priorities most likely to become more important

The two priorities most likely to become more important in the future are delivering value for money and building a reliable and resilient network. Less than 1 in 10 believe any area will become less important.



## Likelihood of their priorities changing in the future



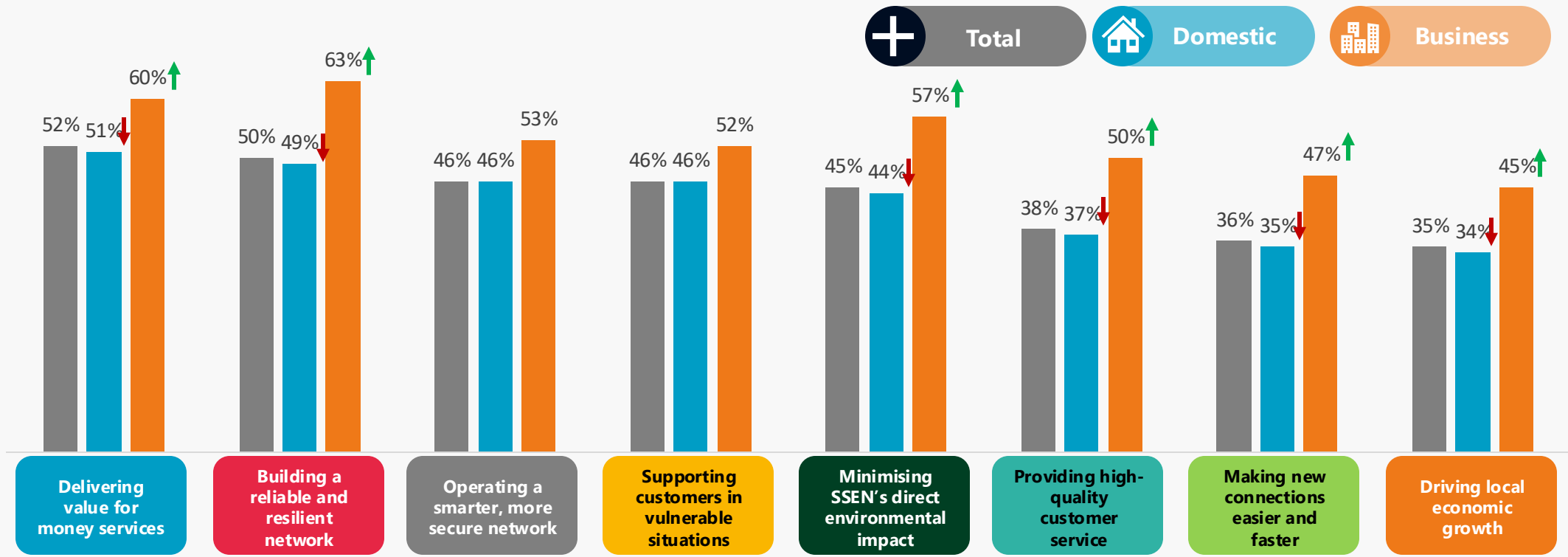
R3. Would any of the priorities you selected be likely to change in the future? From the list below [INSERT: PRIORITY ORDER FROM R1], please select whether you think each priority will become more important, less important or be unchanged in 10 years' time. Total sample: 2,200

# Priorities most likely to become more important

Business customers see all priorities becoming more important in the future than domestic customers do, especially reliability, value for money, and minimising environmental impact.



## Priorities expected to become more important in the future



↑ Significantly higher

↓ Significantly lower

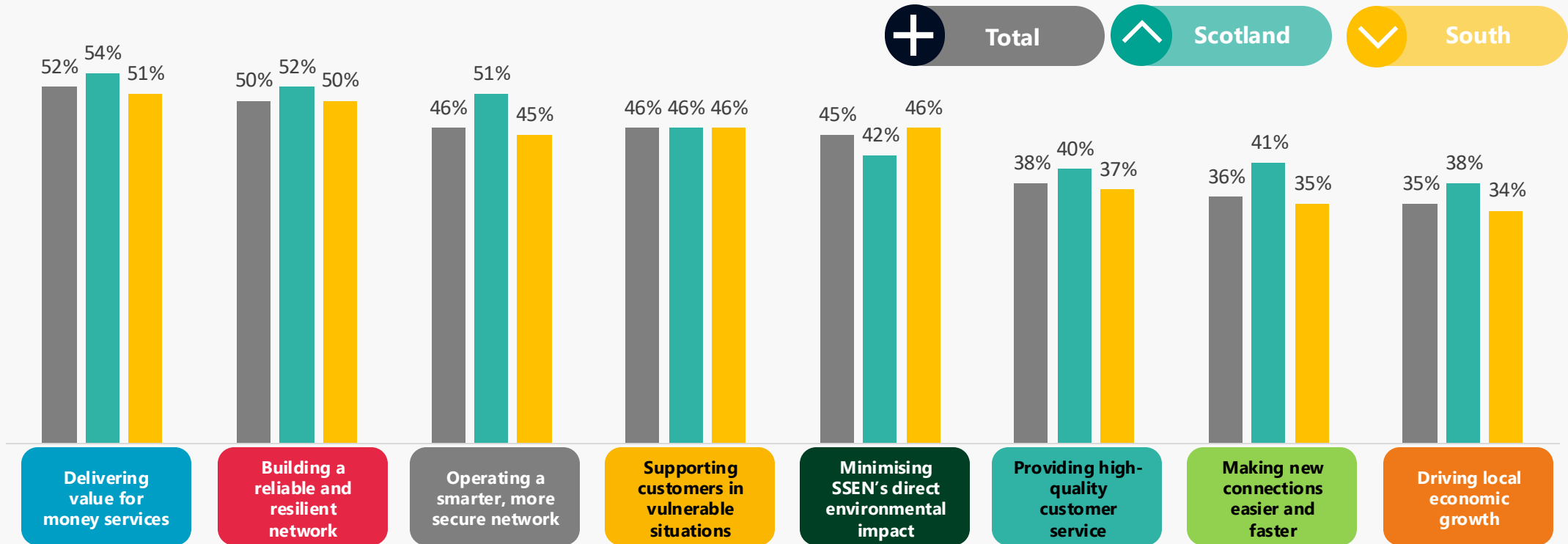
R3. Would any of the priorities you selected be likely to change in the future? From the list below [INSERT: PRIORITY ORDER FROM R1], please select whether you think each priority will become more important, less important or be unchanged in 10 years' time. Total sample: 2,200; Domestic: 2,000, Business: 200

# Priorities most likely to become more important

Whilst most regional differences are marginal, Scottish customers are slightly more likely to feel a smarter, more secure network and making new connections easier will be more important in the future.



## Priorities expected to become more important in the future



R3. Would any of the priorities you selected be likely to change in the future? From the list below [INSERT: PRIORITY ORDER FROM R1], please select whether you think each priority will become more important, less important or be unchanged in 10 years' time. Total sample: 2,200; Scotland: 563, South: 1,637. Differences between regional customers not significant

# Priorities most likely to become more important

The increasing importance of these priorities is clear: rising cost of living, increasing demand for electricity, extreme weather, fast changing technology, security risks, environmental worries and increasing vulnerable customers to name a few.

## Why priority likely to become more important in the future

### Delivering value for money services

"As the cost of living continues to rise it will be vital that services remain cost effective for the public, particularly for vulnerable groups." **Domestic**

"Cost of living rises, inflation etc" **Business**

"Because I cannot see an end to the cost of living crisis so value for money will become increasingly important to me." **Domestic**

"Costs are increasing at an alarming rate" **Business**

### Building a reliable and resilient network

"Critical infrastructure is important" **Domestic**

"Because climate change and storms will continue to impact us more and more." **Domestic**

"As extreme weather increases due to climate change, reliable and resilient power is a must." **Domestic**

There will be an increasing demand for electricity - electric cars, more homes being built and a greater need to be green. We need an effective and reliable network to deliver that" **Domestic**

### Operating a smarter, more secure network

"Because the company will have to move with the times in a changing digital world" **Business**

"Security is likely to become a concern" **Domestic**

"With the evolving of stronger computing power that hackers or terrorists can lay their hands on a reliable, secure and resilient supply is more important than ever." **Domestic**

"Technology is moving so fast might be cheaper to heat our homes in future" **Domestic**

### Supporting customers in vulnerable situations

"As people grow older the potential number of vulnerable people could increase." **Domestic**

"Because cost of living will only get higher and more difficult, leaving more people vulnerable." **Business**

"Supporting vulnerable customers will become more critical in the future, due to the ongoing cost of living crisis, that I imagine will impact our most vulnerable for significantly longer than just 10 years." **Business**

"There will be more older vulnerable people who will need help in future." **Domestic**

### Minimising SSEN's direct environmental impact

"Because we need to support and protect the environment and some strict laws are coming into place soon" **Business**

"The environmental situation is only going to worsen" **Domestic**

"Climate change is my biggest concern to all industries and households - e.g. wind and flood damage - it is predicted to only get worse" **Business**









"I think our damage to the environment will be even worse and need extra care" **Domestic**

A red, rounded rectangular banner is overlaid on the image. Inside the banner, the text '05 Importance of 39 sub-priority areas' is written in white. The number '05' is enclosed in a white circle. The background of the slide is a photograph of a utility worker on a bucket truck working on a power line, with a scenic view of a lake and mountains in the distance under a bright, cloudy sky.

# 05 Importance of 39 sub-priority areas

# Importance of 39 sub priorities

Within each of the priority areas, we tested the importance of sub-priorities.

Building a reliable and resilient network	Delivering value for money services	Supporting customers in vulnerable situations	Providing high-quality customer service	Operating a Smarter, More Secure Network	Minimising SSEN's direct environmental impact	Making new connections easier and faster	Driving local economic growth
							
Minimising the frequency of power cuts where possible	Planning for the long term	Promoting the Priority Service Register to eligible customers	Speeding up the provision of information	Working with others across the energy system	Reducing SF <sub>6</sub> (a powerful greenhouse gas) emissions	Making sure customers can adopt Low Carbon Technologies when they want to	Maximising opportunities for British equipment manufacturers
Minimising the duration of power cuts when they happen	Helping bring down bills in the long term	Providing targeted support for our most vulnerable customers	Handling customer complaints	Maximising the value of our network data	Reducing the use of diesel back-up generators	Making it easy for customers to get connected to the electricity network	Building skills for the future
Preparing for extreme weather	Maximising the use of technologies	Working with third-parties and partners (including other utility companies, Citizens Advice and charities) to offer extra support to our most vulnerable customers	Balancing the use of advanced tools	Helping customers take part in flexibility schemes.	Developing nature-based solutions	Speeding up the delivery of new electricity connections	Helping local small businesses grow
Making our network more resilient	Rolling out successful innovation schemes	Supporting energy efficiency schemes	Ensuring transparent communications for our customers	Improving network efficiency	Encouraging our suppliers to follow our sustainability standards	Planning the electricity network in advance so we're ready to connect important projects	Growing our pipeline of apprentices
Monitoring our network	Empowering our people		Providing extra support during storms	Prioritising cyber security	Managing our use of oil filled cables responsibly	Provide clear information about the connections process at the pre-application stage	Developing our pipeline of adult learners

R5/R8. Each of the areas you just ranked can be supported by different types of investments from SSEN. We're now going to show you some examples of these investments in the topics you just looked at. Please rank these investments from most important to least important, to show us which ones you think SSEN should focus on first. Remember: even if you put something lower on the list, we know it can still matter to you. We just want to understand which things you feel should be the biggest priorities.

Total sample: 2,200 Full text shown

# Importance of 39 sub priorities

As asking customers to rank all 39 sub-priorities at the same time would be too taxing we asked them to rank the 4-5 sub-priorities within each area in turn.

Participants were shown four priority areas and asked to rank their sub-priorities in Question R5. They were then shown the remaining four priority areas and asked to rank their 4–5 sub-priorities in Question R8. To prevent order bias, the sequence of priority areas was rotated.

This approach significantly reduced cognitive load by allowing participants to focus on one area at a time and rank only a small set of 4–5 items.

## First question

Each of the areas you just ranked can be supported by different types of investments from SSEN.

We're now going to show you some examples of these investments in the topics you just looked at.

Please **rank these investments from most important to least important**, to show us which ones you think SSEN should focus on first.

Remember: even if you put something lower on the list, we know it can still matter to you. We just want to understand which things you feel should be the biggest priorities.

Consider the potential investment area **Driving local economic growth**.

## Second question

We are now going to show you a few more potential investment areas to consider.

Just like before, please rank the following from most important to least important to indicate which you feel are the most important for SSEN to focus on.









Consider the potential investment area **Delivering value for money services**.

# Importance of 39 sub priorities

If we look at the ranking within each main priority area, we can see certain sub-priorities really stand out (particularly helping bring down bills at 50%).

## % selecting sub-priority in 1st place within priority area

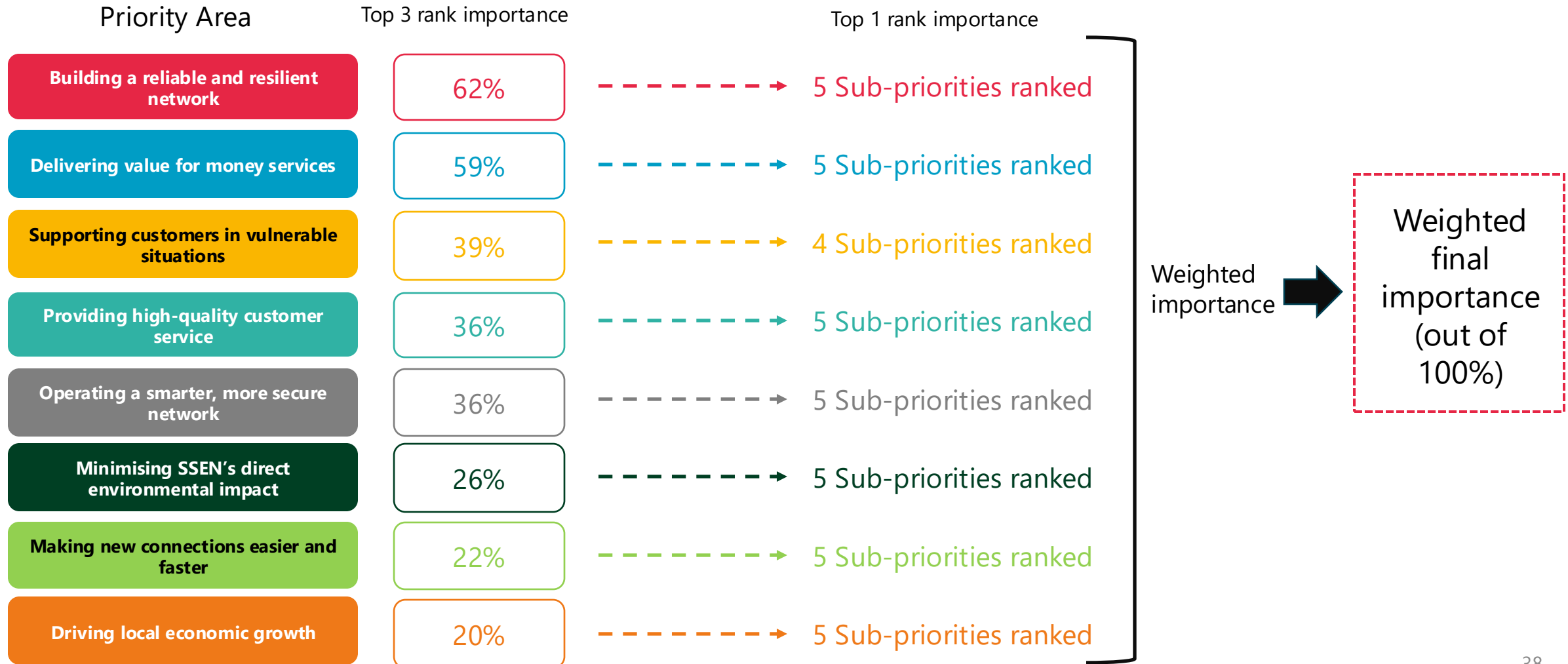
Note: Mean scores follow the same priority order

Building a reliable and resilient network	Delivering value for money services	Supporting customers in vulnerable situations	Providing high-quality customer service	Operating a Smarter, More Secure Network	Minimising SSEN's direct environmental impact	Making new connections easier and faster	Driving local economic growth
							
<b>31%</b> Making our network more resilient	<b>50%</b> Helping bring down bills in the long term	<b>35%</b> Providing targeted support for our most vulnerable customers	<b>33%</b> Providing extra support during storms	<b>34%</b> Improving network efficiency	<b>31%</b> Developing nature-based solutions	<b>26%</b> Making it easy for customers to get connected to the electricity network	<b>30%</b> Building skills for the future
<b>22%</b> Preparing for extreme weather	<b>25%</b> Planning for the long term	<b>30%</b> Supporting energy efficiency schemes	<b>26%</b> Ensuring transparent communications for our customers	<b>25%</b> Prioritising cyber security	<b>23%</b> Reducing SF <sub>6</sub> (a powerful greenhouse gas) emissions	<b>25%</b> Planning the electricity network in advance so we're ready to connect important projects	<b>22%</b> Maximising opportunities for British equipment manufacturers
<b>21%</b> Minimising the frequency of power cuts where possible	<b>10%</b> Empowering our people	<b>20%</b> Promoting the Priority Service Register to eligible customers	<b>20%</b> Handling customer complaints	<b>24%</b> Helping customers take part in flexibility schemes.	<b>17%</b> Encouraging our suppliers to follow our sustainability standards	<b>17%</b> Provide clear information about the connections process at the pre-application stage	<b>18%</b> Helping local small businesses grow
<b>16%</b> Minimising the duration of power cuts when they happen	<b>9%</b> Maximising the use of technologies	<b>15%</b> Working with third-parties and partners to offer extra support to our most vulnerable customers	<b>11%</b> Speeding up the provision of information	<b>10%</b> Working with others across the energy system	<b>16%</b> Reducing the use of diesel back-up generators	<b>17%</b> Making sure customers can adopt Low Carbon Technologies when they want to	<b>17%</b> Growing our pipeline of apprentices
<b>12%</b> Monitoring our network	<b>7%</b> Rolling out successful innovation schemes		<b>11%</b> Balancing the use of advanced tools	<b>8%</b> Maximising the value of our network data	<b>12%</b> Managing our use of oil filled cables responsibly	<b>15%</b> Speeding up the delivery of new electricity connections	<b>12%</b> Developing our pipeline of adult learners

R5/R8. Each of the areas you just ranked can be supported by different types of investments from SSEN. We're now going to show you some examples of these investments in the topics you just looked at. Please rank these investments from most important to least important, to show us which ones you think SSEN should focus on first. Remember: even if you put something lower on the list, we know it can still matter to you. We just want to understand which things you feel should be the biggest priorities. Total sample: 2,200

# Contextualising the importance of the 39 sub-priorities

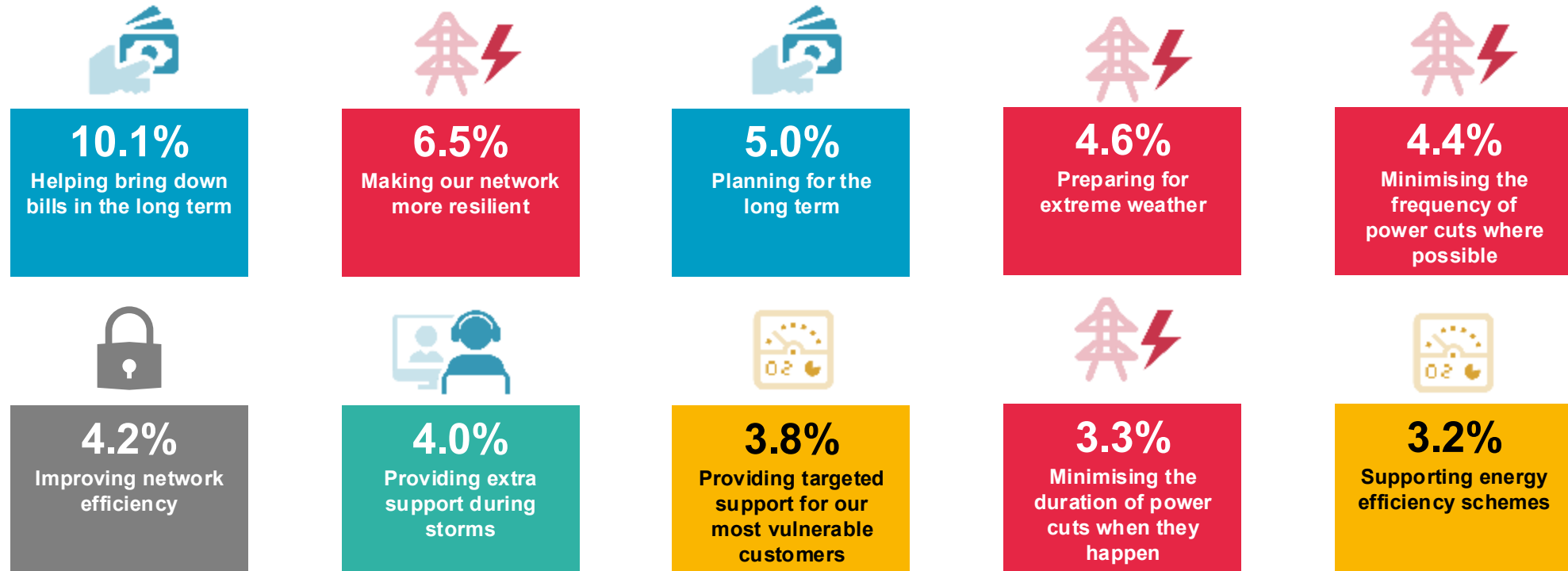
We used Advanced Analysis to combine importance from R1 (overall priority ranking) with importance from R5/R8 (sub-priority ranking).



# Top 10 sub-priorities

Reliability / resilience and value for money sub-priorities account for 6 out of the top 10 priorities (34% in total).

## Top 10 sub-priority areas ranking weighted by overall priority area importance



Key to different sub-priority area colours



R5/R8. Each of the areas you just ranked can be supported by different types of investments from SSEN. We're now going to show you some examples of these investments in the topics you just looked at. Please rank these investments from most important to least important, to show us which ones you think SSEN should focus on first. Remember: even if you put something lower on the list, we know it can still matter to you. We just want to understand which things you feel should be the biggest priorities.

# Top 20 sub-priorities

As we move down the list to top 20, there is consistency in the importance of sub-priorities, with them typically relating to reliability / resilience, value for money and supporting customers in vulnerable circumstances.

## Top 20 sub-priority areas ranking weighted by overall priority area importance

Overall ranking		%
1	Helping bring down bills in the long term	10.1%
2	Making our network more resilient	6.5%
3	Planning for the long term	5.0%
4	Preparing for extreme weather	4.6%
5	Minimising the frequency of power cuts where possible	4.4%
6	Improving network efficiency	4.2%
7	Providing extra support during storms	4.0%
8	Providing targeted support for our most vulnerable customers	3.8%
9	Minimising the duration of power cuts when they happen	3.3%
10	Supporting energy efficiency schemes	3.2%

Overall ranking		%
11	Ensuring transparent communications for our customers	3.1%
12	Prioritising cyber security	3.1%
13	Helping customers take part in flexibility schemes	2.9%
14	Developing nature-based solutions	2.8%
15	Monitoring our network	2.5%
16	Handling customer complaints	2.4%
17	Promoting the Priority Service Register to eligible customers	2.2%
18	Empowering our people	2.1%
19	Reducing SF <sub>6</sub>	2.1%
20	Building skills for the future	2.0%

Improving network efficiency and providing extra support during storms perform strongly

Key to different sub-priority area colours

							
Building a reliable and resilient network	Delivering value for money services	Supporting customers in vulnerable situations	Providing high-quality customer service	Minimising SSEN's direct environmental impact	Operating a Smarter, More Secure Network	Driving local economic growth	Making new connections easier and faster

R5/R8. Each of the areas you just ranked can be supported by different types of investments from SSEN. We're now going to show you some examples of these investments in the topics you just looked at. Please rank these investments from most important to least important, to show us which ones you think SSEN should focus on first. Remember: even if you put something lower on the list, we know it can still matter to you. We just want to understand which things you feel should be the biggest priorities. Total sample: 2200

# All 39 sub-priority ranking weighted by overall priority area importance

Overall ranking		%
1	Helping bring down bills in the long term	10.1%
2	Making our network more resilient	6.5%
3	Planning for the long term	5.0%
4	Preparing for extreme weather	4.6%
5	Minimising the frequency of power cuts where possible	4.4%
6	Improving network efficiency	4.2%
7	Providing extra support during storms	4.0%
8	Providing targeted support for our most vulnerable customers	3.8%
9	Minimising the duration of power cuts when they happen	3.3%
10	Supporting energy efficiency schemes	3.2%
11	Ensuring transparent communications for our customers	3.1%
12	Prioritising cyber security	3.1%
13	Helping customers take part in flexibility schemes	2.9%
14	Developing nature-based solutions	2.8%
15	Monitoring our network	2.5%
16	Handling customer complaints	2.4%
17	Promoting the Priority Service Register to eligible customers	2.2%
18	Empowering our people	2.1%
19	Reducing SF <sub>6</sub>	2.1%
20	Building skills for the future	2.0%

Overall ranking		%
21	Making it easy for customers to get connected to the network	2.0%
22	Planning network in advance so ready to connect important projects	1.9%
23	Maximising the use of technologies	1.7%
24	Working with third-parties and partners	1.6%
25	Encouraging our suppliers to follow our sustainability standards	1.5%
26	Maximising opportunities for British equipment manufacturers	1.5%
27	Reducing the use of diesel back-up generators	1.4%
28	Rolling out successful innovation schemes	1.4%
29	Speeding up the provision of information	1.4%
30	Balancing the use of advanced tools	1.3%
31	Provide clear info about connections process at pre-application stage	1.3%
32	Helping local small businesses grow	1.2%
33	Ensuring customers can adopt Low Carbon Tech when they want to	1.2%
34	Working with others across the energy system	1.2%
35	Growing our pipeline of apprentices	1.2%
36	Speeding up the delivery of new electricity connections	1.1%
37	Managing our use of oil filled cables responsibly	1.1%
38	Maximising the value of our network data	1.0%
39	Developing our pipeline of adult learners	0.8%

Key to different sub-priority area colours

							
Building a reliable and resilient network	Delivering value for money services	Supporting customers in vulnerable situations	Providing high-quality customer service	Minimising SSEN's direct environmental impact	Operating a Smarter, More Secure Network	Driving local economic growth	Making new connections easier and faster

R5/R8. Each of the areas you just ranked can be supported by different types of investments from SSEN. We're now going to show you some examples of these investments in the topics you just looked at. Please rank these investments from most important to least important, to show us which ones you think SSEN should focus on first. Remember: even if you put something lower on the list, we know it can still matter to you. We just want to understand which things you feel should be the biggest priorities. Total sample: 2200

# Importance of 39 sub priorities

Bringing bills down is slightly more important to domestic customers, whereas building skills for the future is more important to business customers. Differences by region are only marginal, and never more than 1% apart.



By sample

## Top 20 sub-priority areas ranking by sample type (ranked by total sample) weighted by overall priority area importance

Overall ranking		Domestic	Business
1	Helping bring down bills in the long term	10.3%	8.3%
2	Making our network more resilient	6.4%	7.2%
3	Planning for the long term	5.1%	4.0%
4	Preparing for extreme weather	4.7%	3.5%
5	Minimising the frequency of power cuts where possible	4.4%	4.4%
6	Improving network efficiency	4.1%	4.6%
7	Providing extra support during storms	4.1%	3.8%
8	Providing targeted support for our most vulnerable customers	3.9%	3.3%
9	Minimising the duration of power cuts when they happen	3.3%	3.3%
10	Supporting energy efficiency schemes	3.3%	2.7%

Overall ranking		Domestic	Business
11	Ensuring transparent communications for our customers	3.2%	2.3%
12	Prioritising cyber security	3.1%	3.0%
13	Helping customers take part in flexibility schemes	3.0%	2.2%
14	Developing nature-based solutions	2.8%	3.1%
15	Monitoring our network	2.5%	2.7%
16	Handling customer complaints	2.4%	2.0%
17	Promoting the Priority Service Register to eligible customers	2.2%	2.0%
18	Empowering our people	2.1%	1.9%
19	Reducing SF <sub>6</sub>	2.1%	2.0%
20	Building skills for the future	1.9%	3.8%

Key to different sub-priority area colours

							
Building a reliable and resilient network	Delivering value for money services	Supporting customers in vulnerable situations	Providing high-quality customer service	Minimising SSEN's direct environmental impact	Operating a Smarter, More Secure Network	Driving local economic growth	Making new connections easier and faster

R5/R8. Each of the areas you just ranked can be supported by different types of investments from SSEN. We're now going to show you some examples of these investments in the topics you just looked at. Please rank these investments from most important to least important, to show us which ones you think SSEN should focus on first. Remember: even if you put something lower on the list, we know it can still matter to you. We just want to understand which things you feel should be the biggest priorities. Domestic: 2,000, Business: 200. Differences between domestic and business customers not significant.

# Differences by region

Differences by region are only marginal, and never more than 1% apart.



## Top 20 sub-priority areas ranking by sample type (ranked by total sample) weighted by overall priority area importance

Overall ranking		Scotland	South
1	Helping bring down bills in the long term	9.3%	10.3%
2	Making our network more resilient	6.4%	6.5%
3	Planning for the long term	4.7%	5.1%
4	Preparing for extreme weather	5.2%	4.4%
5	Minimising the frequency of power cuts where possible	4.5%	4.3%
6	Improving network efficiency	4.5%	4.1%
7	Providing extra support during storms	4.3%	4.0%
8	Providing targeted support for our most vulnerable customers	4.0%	3.8%
9	Minimising the duration of power cuts when they happen	3.3%	3.3%
10	Supporting energy efficiency schemes	3.4%	3.2%

Overall ranking		Scotland	South
11	Ensuring transparent communications for our customers	3.1%	3.1%
12	Prioritising cyber security	2.4%	3.2%
13	Helping customers take part in flexibility schemes	3.0%	2.9%
14	Developing nature-based solutions	2.9%	2.8%
15	Monitoring our network	2.4%	2.5%
16	Handling customer complaints	2.0%	2.5%
17	Promoting the Priority Service Register to eligible customers	1.9%	2.2%
18	Empowering our people	2.0%	2.1%
19	Reducing SF <sub>6</sub>	2.0%	2.1%
20	Building skills for the future	2.6%	1.9%

Key to different sub-priority area colours

							
Building a reliable and resilient network	Delivering value for money services	Supporting customers in vulnerable situations	Providing high-quality customer service	Minimising SSEN's direct environmental impact	Operating a Smarter, More Secure Network	Driving local economic growth	Making new connections easier and faster

R5/R8. Each of the areas you just ranked can be supported by different types of investments from SSEN. We're now going to show you some examples of these investments in the topics you just looked at. Please rank these investments from most important to least important, to show us which ones you think SSEN should focus on first. Remember: even if you put something lower on the list, we know it can still matter to you. We just want to understand which things you feel should be the biggest priorities.

Scotland: 563, South: 1,637

# Using the ‘chip game’ to rank sub-priorities

As well as asking customers to rank the sub-priorities, we asked them to play a ‘chip game’. Customers had 100 chips to assign to 8 randomly selected sub-priorities - thinking of how SSEN should invest to benefit their community.

They could choose to assign all 100 chips to only one sub-priority, to assign 0 chips to one or more sub-priority or spread them across any number of them.

Now imagine you are in charge of deciding how SSEN should invest funds in projects that will affect **your community**. Think about things like energy infrastructure, the environment, the future, and local needs and decide how you would divide the funding.

To keep it simple, imagine you have **100 chips to spend**. Allocate your chips across the following 8 areas to show how you would invest the money. You don’t need to give chips to every area, but you must spend all 100 chips.

As you decide, focus on the **projects and initiatives that you believe would most benefit your community**.

	Number of chips
Helping bring down bills in the long term	
Making our network more resilient	
Preparing for extreme weather	
Improving network efficiency	
Providing extra support during storms	
Providing targeted support for our most vulnerable customers	
Prioritising cyber security	
Developing nature-based solutions	

# Using the ‘chip game’ to rank sub-priorities

This game resulted in a ranking across the 39 sub-priorities reflective of the perceived benefit to the community of investment. The 10 with the most chips assigned were much very in line with the top 10 ranking exercise.

## Top 10 sub-priorities based on average chips assigned

Helping bring down bills in the long term	24.5
Making our network more resilient	16.6
Minimising the frequency of power cuts where possible	16.5
Planning for the long term	15.5
Minimising the duration of power cuts when they happen	15.4
Improving network efficiency	15.3
Providing targeted support for our most vulnerable customers	15.2
Preparing for extreme weather	14.0
Supporting energy efficiency schemes	13.7
Developing nature-based solutions	13.6
Providing extra support during storms	13.5

Key to different sub-priority area colours

							
Building a reliable and resilient network	Delivering value for money services	Supporting customers in vulnerable situations	Providing high-quality customer service	Minimising SSEN's direct environmental impact	Operating a Smarter, More Secure Network	Driving local economic growth	Making new connections easier and faster

# Using the ‘chip game’ to rank sub-priorities

Sub-priorities that received no chips are typically those where the benefits to the community are less obvious to identify. Even for the key priority area of ‘value for money’, two sub-priorities within it aren’t seen to benefit the community as strongly.

## Least selected – proportion that allocated the sub-priority zero chips

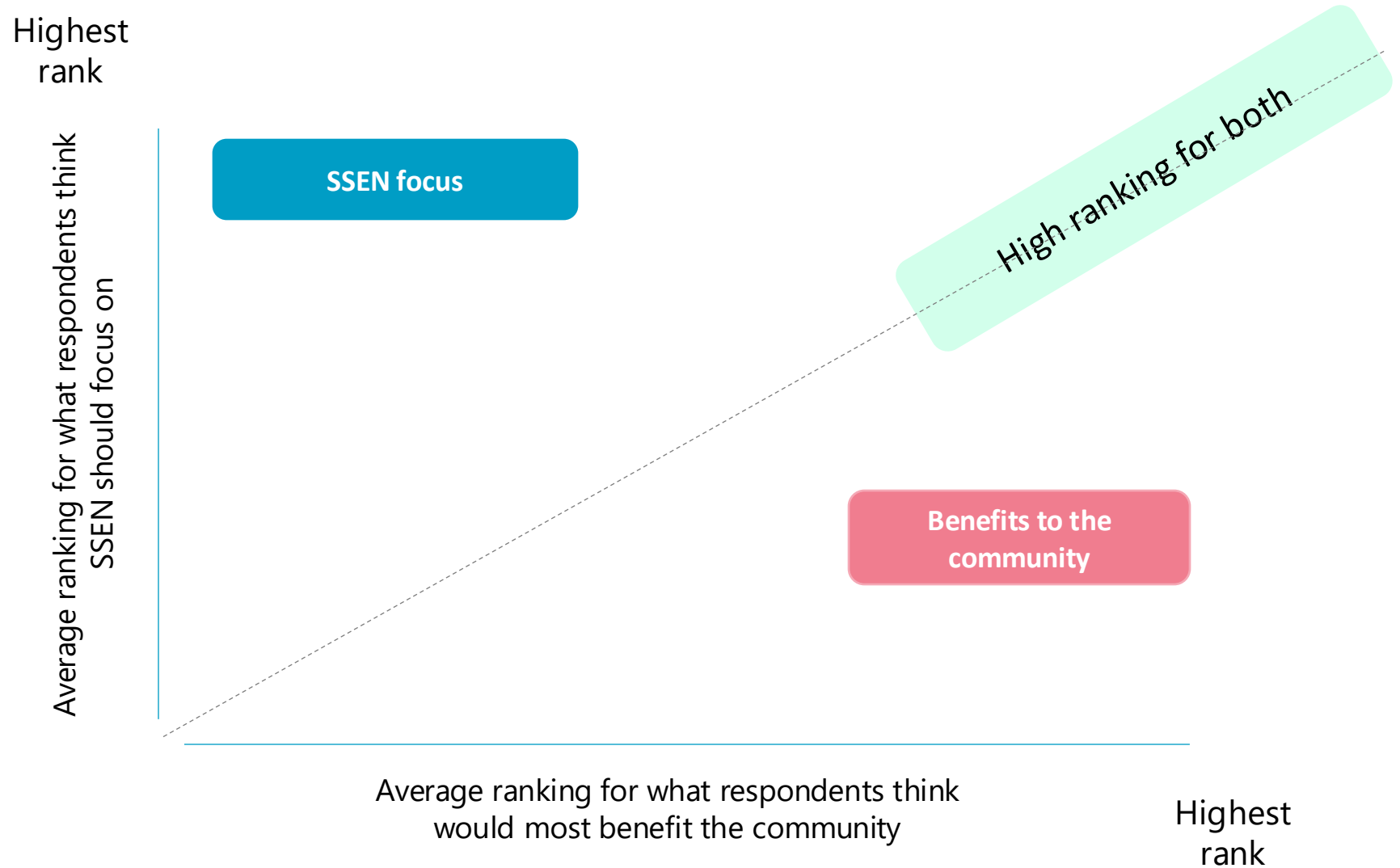
Balancing the use of advanced tools	14.6
Maximising the value of our network data	14.0
Encouraging our suppliers to follow our sustainability standards	13.3
Reducing SF <sub>6</sub>	13.0
Maximising the use of technologies	13.0
Rolling out successful innovation schemes	12.7
Working with third-parties and partners	12.6
Maximising opportunities for British equipment manufacturers	11.9
Provide clear information about connections process at pre-application stage	11.4
Making it easy for customers to get connected to the electricity network	11.2

Key to different sub-priority area colours

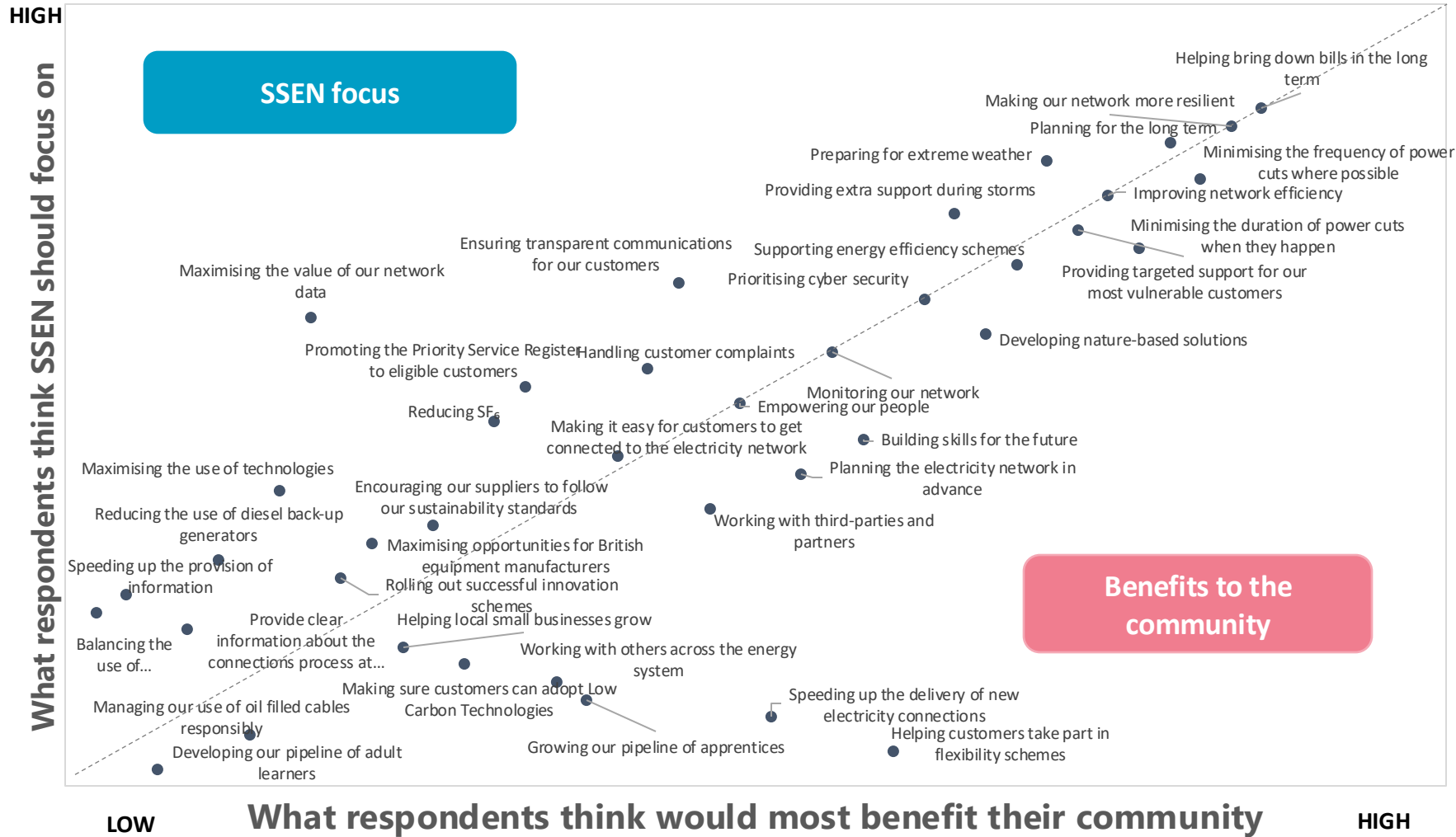
							
Building a reliable and resilient network	Delivering value for money services	Supporting customers in vulnerable situations	Providing high-quality customer service	Minimising SSEN’s direct environmental impact	Operating a Smarter, More Secure Network	Driving local economic growth	Making new connections easier and faster

# We then compared the importance given for SSEN with the perceived benefit to the community

*(Ranks were reversed so the highest ranking sub-priorities are in the upper right quadrant)*



# How customers think SSEN should focus investment vs. what most benefits their community



This shows all 39 sub-priority rankings plotted.

Sub-priorities sitting **above** the diagonal line are those **respondents think SSEN should focus on**.

Sub-priorities **below** the line are those respondents think would **most benefit their community**.

Sub-priorities sitting **on** the line have **equal importance** to SSEN and the community.

Based on survey responses comparing what participants think SSEN should prioritise (R5) with how they would allocate investment to benefit their community (CH2).  
Sample CH2 - Domestic: 376-533 Business: 31-58/ R5: Domestic: 2005, Business: 200

A group of about ten people are walking through a lush green field, carrying potted trees and shovels. They appear to be participating in a tree-planting activity. The background shows a rolling green landscape with a small stream or path in the distance. A semi-transparent dark green banner is overlaid across the middle of the image, containing the text '06 Importance of social impact areas'.

# 06 Importance of social impact areas

# Importance of social impact areas

We showed 4 areas regarding community support / social impact. Customers were asked to rank these in importance.

“Please rank the 4 different areas from 1-4 (where 1 is the most important) to indicate which you feel are the most important for SSEN to focus on. Remember: even if you put something lower on the list, we know it can still matter to you. We just want to understand which things you feel should be the biggest priorities.”

## INVESTING EARLY



Futureproofing the network to enable homes and businesses to connect low carbon technology when they're ready

## EXTRA VALUE



Investment to boost biodiversity (the variety of plants, animals and habitats) in our communities for example, through our partnership with the Bumblebee Conservation Trust.

## SUPPORTING COMMUNITY



Partnering with schools to educate and prepare pupils for future careers in STEM (science, technology, engineering and maths).

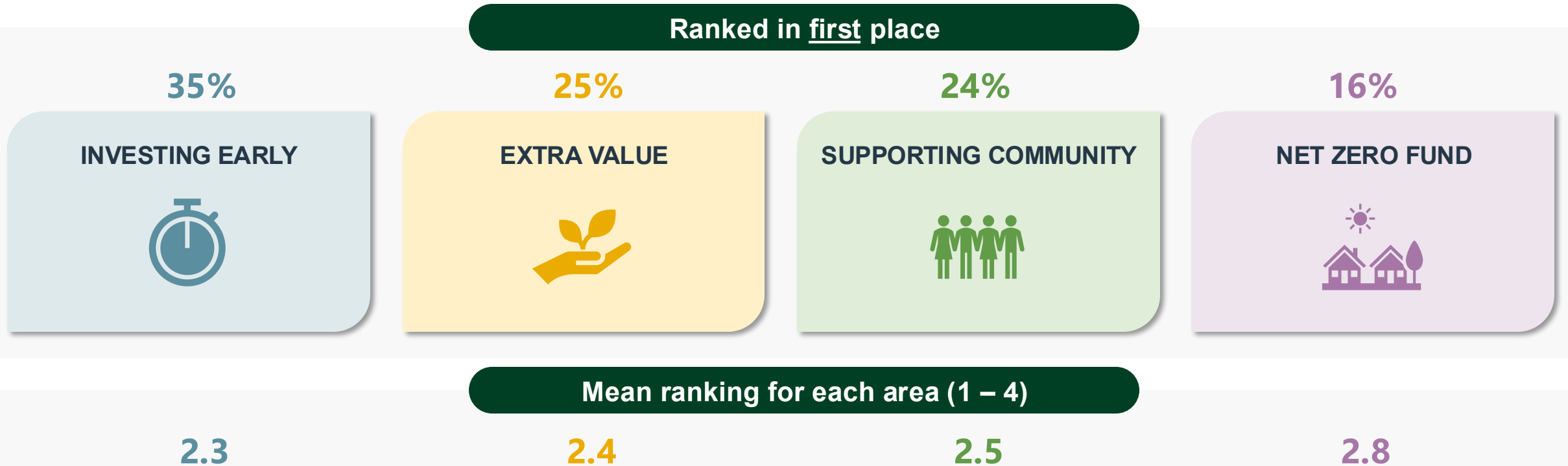
## NET ZERO FUND



SSEN provides grants to help communities become more resilient and adopt low carbon technologies.

# Importance of social impact areas

Futureproofing the network by investing early is considered most important, while net zero is least important. Ranking only differs marginally between domestic and business customers, and by region.



**Significant differences**

Older (65+) male and AB customers consider 'Investing early' as significantly more important, as do those who pay bills with no difficulties.  
 Those who struggle to pay bills consider 'Extra value' as more important.  
 And those who have become more concerned about the environment in the last year consider 'Net Zero Fund' as more important.

CH1. Please rank the 4 different areas from 1-4 (where 1 is the most important) to indicate which you feel are the most important for SSEN to focus on. Remember: even if you put something lower on the list, we know it can still matter to you. We just want to understand which things you feel should be the biggest priorities.

Total sample: 2,200 [Data Tables](#)

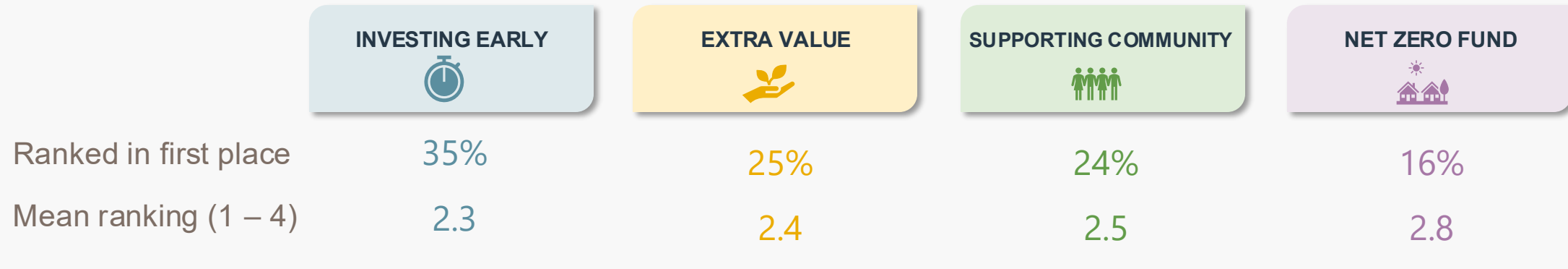
# Importance of social impact areas

Ranking only differs marginally between domestic and business customers.

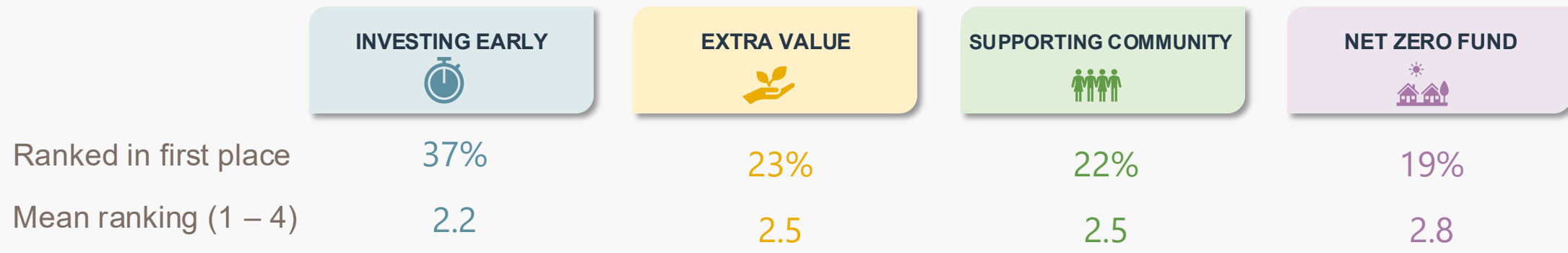


By sample

## Domestic



## Business



CH1. Please rank the 4 different areas from 1-4 (where 1 is the most important) to indicate which you feel are the most important for SSEN to focus on. Remember: even if you put something lower on the list, we know it can still matter to you. We just want to understand which things you feel should be the biggest priorities.

Domestic: 2,000, Business: 200 [Data Tables](#)

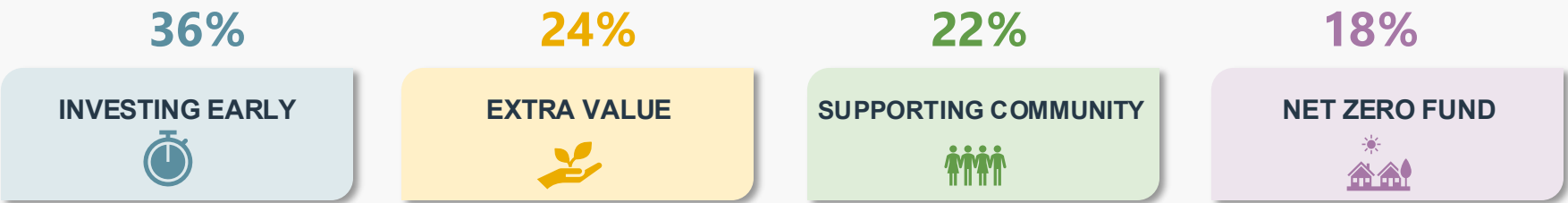
# Importance of social impact areas



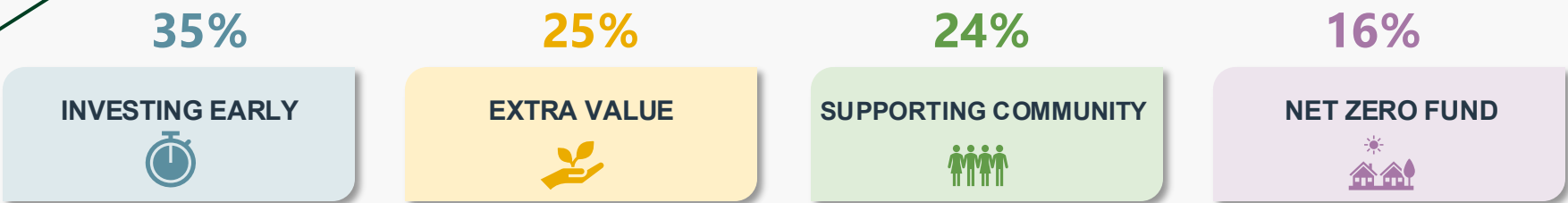
Similarly, Scotland and the South give each area similar rankings.



## Scotland - ranked in first place



## South - ranked in first place



CH1. Please rank the 4 different areas from 1-4 (where 1 is the most important) to indicate which you feel are the most important for SSEN to focus on. Remember: even if you put something lower on the list, we know it can still matter to you. We just want to understand which things you feel should be the biggest priorities.  
Scotland: 563, South: 1,637 [Data Tables](#)

# 07 Affordability



# Affordability

Annual household income is highest in the South at £47,869, with Scotland an average of circa £5,000 lower.

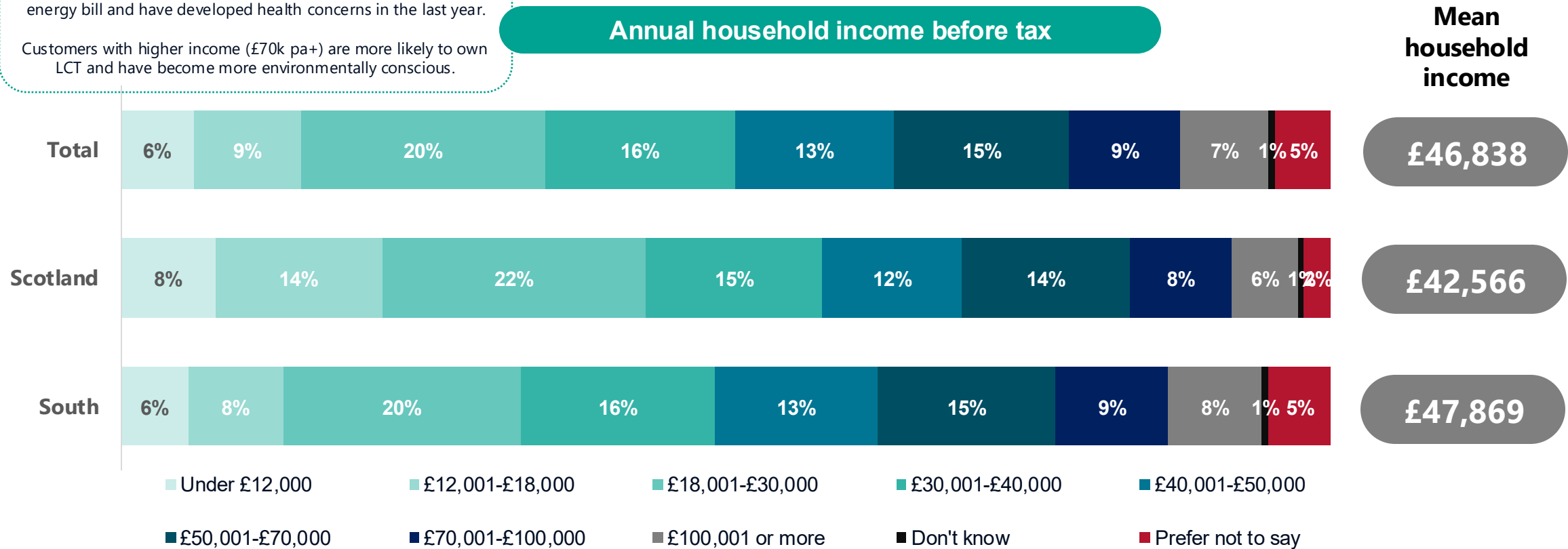


### Significant differences

Customers with lower income (under £30k pa) are more likely to be female, vulnerable, renting their home, struggling to pay their energy bill and have developed health concerns in the last year.

Customers with higher income (£70k pa+) are more likely to own LCT and have become more environmentally conscious.

## Annual household income before tax



C2b. Which of the following income bands does your total household income fall into? Please take into account earnings before tax and other deductions.  
Total domestic: 2,000; Scotland domestic: 510; South domestic: 1490

# Affordability by sample

**+** Total

**🏠** Domestic

**🏢** Business

**🏠**  
**🏢**  
By sample

Difficulties paying energy bills are significantly more likely for domestic customers at 47% (33% struggling from time to time and 14% struggling constantly).

**Differences by region in ability to pay bills are marginal**

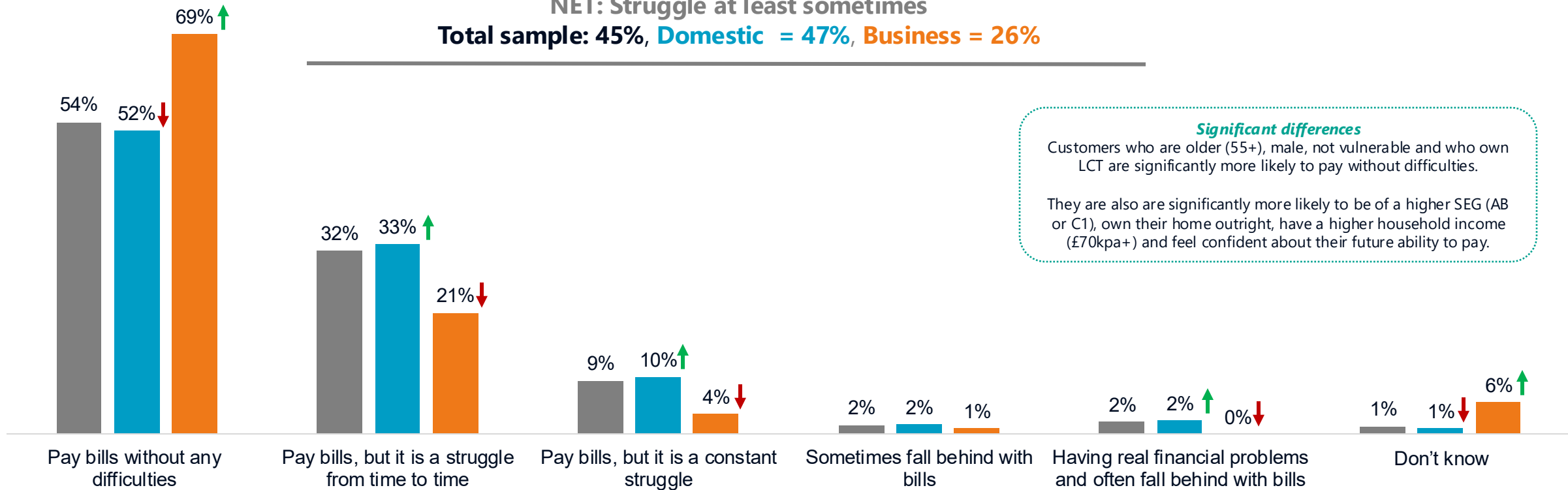
↑ Significantly higher

↓ Significantly lower

## Situation with paying energy bill

**NET: Struggle at least sometimes**

**Total sample: 45%, Domestic = 47%, Business = 26%**



**Significant differences**  
Customers who are older (55+), male, not vulnerable and who own LCT are significantly more likely to pay without difficulties.  
They are also significantly more likely to be of a higher SEG (AB or C1), own their home outright, have a higher household income (£70kpa+) and feel confident about their future ability to pay.

C5. Which one of the following statements best describes your [ NHH: IF NOT 1 AT SQ7 (SOLE TRADER): organisation's] situation with paying your energy bill?  
Total: 2,200; Domestic: 2000; Business: 200

# Affordability by region

+ Total

^ Scotland

v South



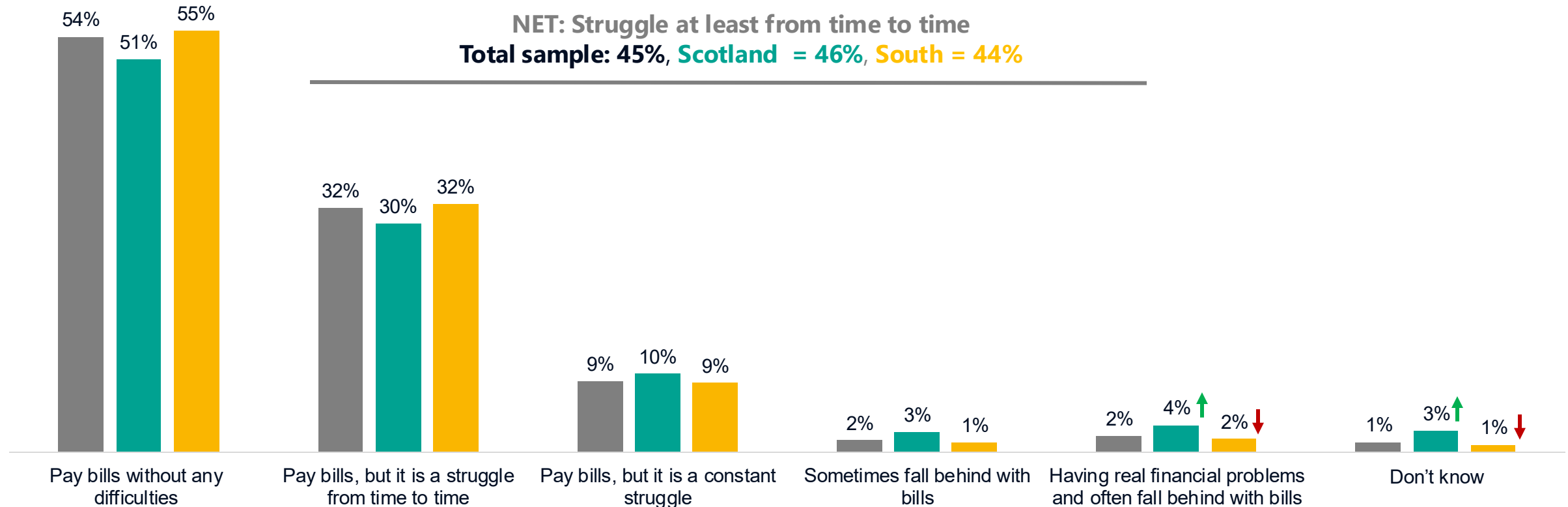
In contrast, differences by region in ability to pay bills are marginal.

↑ Significantly higher

↓ Significantly lower

## Situation with paying energy bill

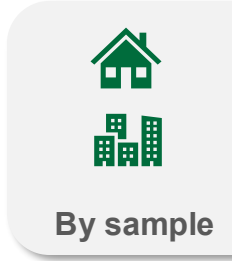
NET: Struggle at least from time to time  
 Total sample: 45%, Scotland = 46%, South = 44%



C5. Which one of the following statements best describes your [ NHH: IF NOT 1 AT SQ7 (SOLE TRADER): organisation's] situation with paying your energy bill?  
 Total: 2,200; Scotland: 563; South: 1,637

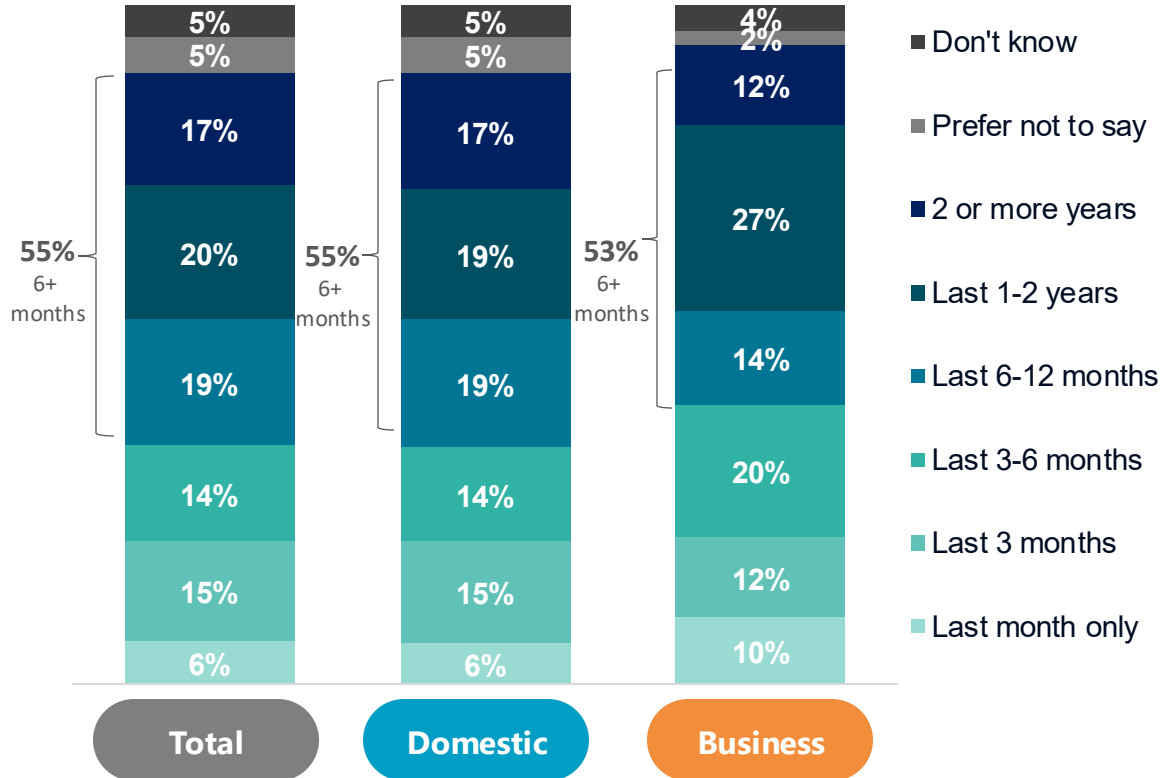
# Affordability by sample

↑ Significantly higher  
↓ Significantly lower

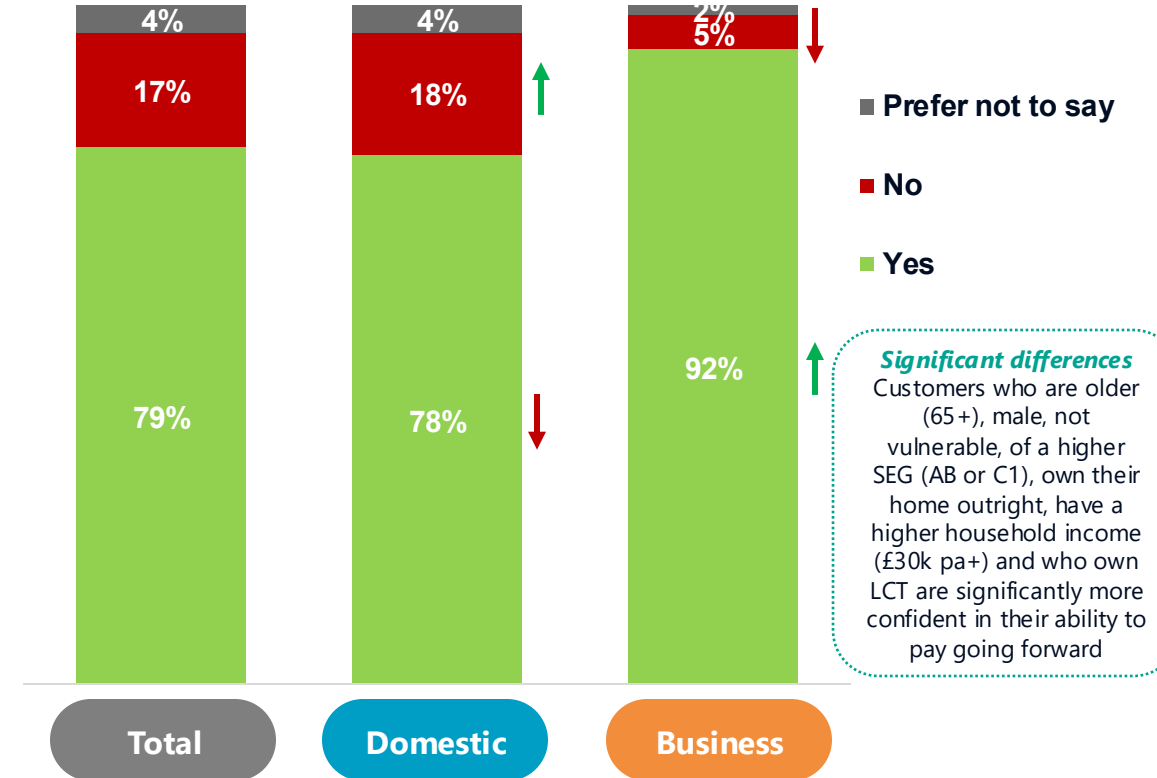


For those who have struggled to pay their bills, this tends to be a more long-term problem (55% struggled for 6 months or longer). While most are confident they will be able to pay future bills, 17% are not (18% domestic vs 5% business).

## Length of time struggled to pay energy bill



## Whether confident they can pay bills in next 12 months



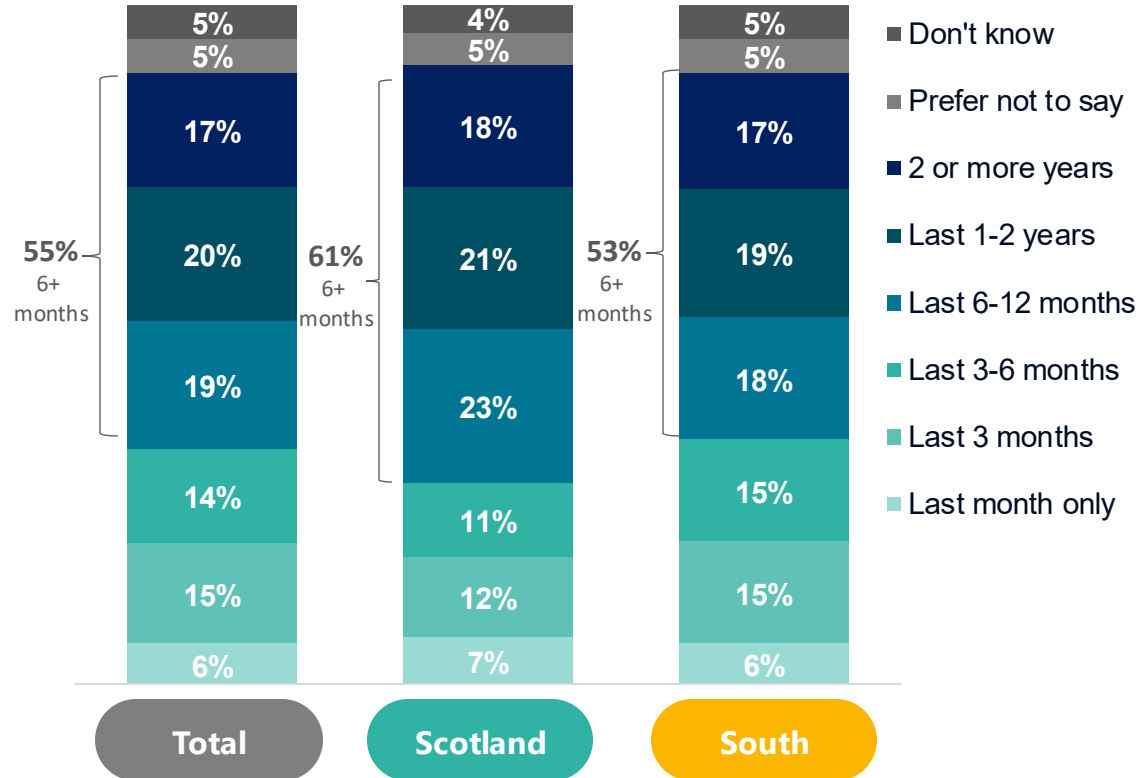
C5a. You said that paying your bills can be a struggle at times. How long have you had difficulties paying your bills? All who said paying bills can be a struggle: Total sample: 902, Domestic: 851, Business: 51  
C7. Are you confident that you will be able to pay for your [NHH: business] bills in the next twelve months without needing to make further changes? Total sample: 2,200, Domestic: 2,000, Business: 200

# Affordability by region

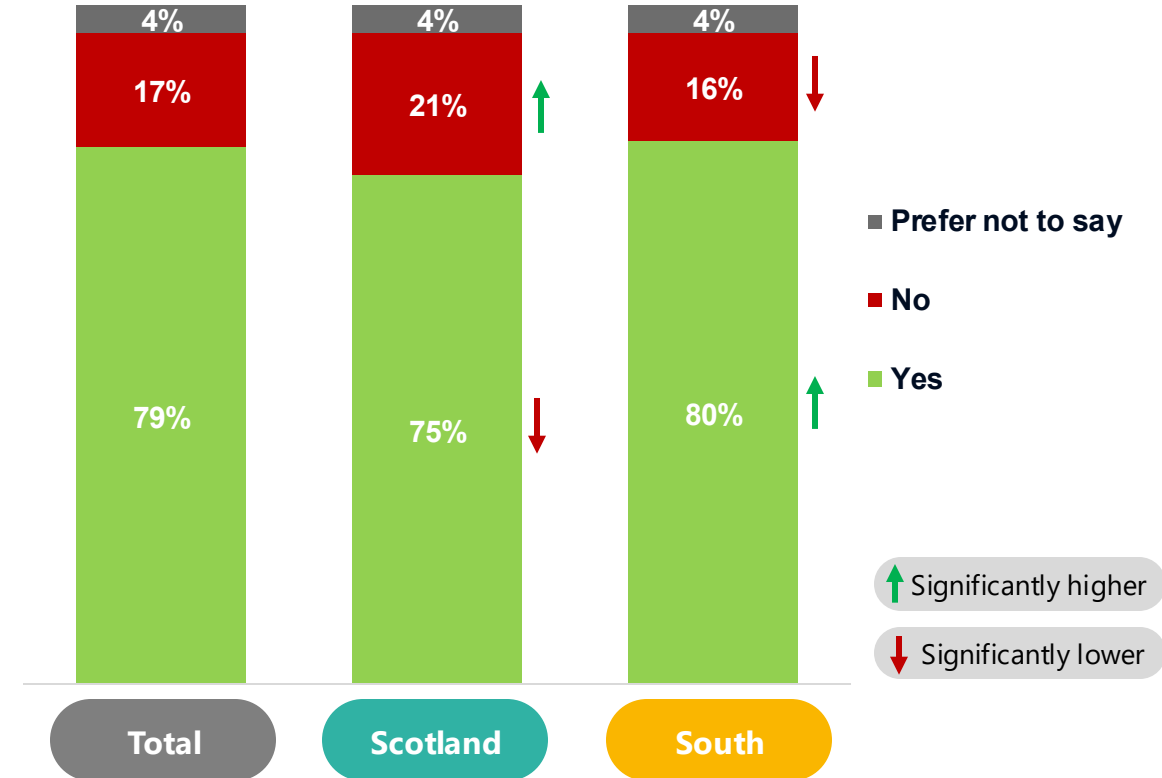


Bill struggles seem to be a little more long-term in Scotland, with Scottish customers also expressing less confidence in future ability to pay.

## Length of time struggled to pay energy bill



## Whether confident they can pay bills in next 12 months



C5a. You said that paying your bills can be a struggle at times. How long have you had difficulties paying your bills? All who said paying bills can be a struggle: Total sample: 902, Scotland: 245, South: 657  
 C7. Are you confident that you will be able to pay for your [NHH: business'] bills in the next twelve months without needing to make further changes? All who said paying bills can be a struggle: Total sample: 2,200, Scotland: 563; South: 1,637

# Affordability by region

↑ Significantly higher

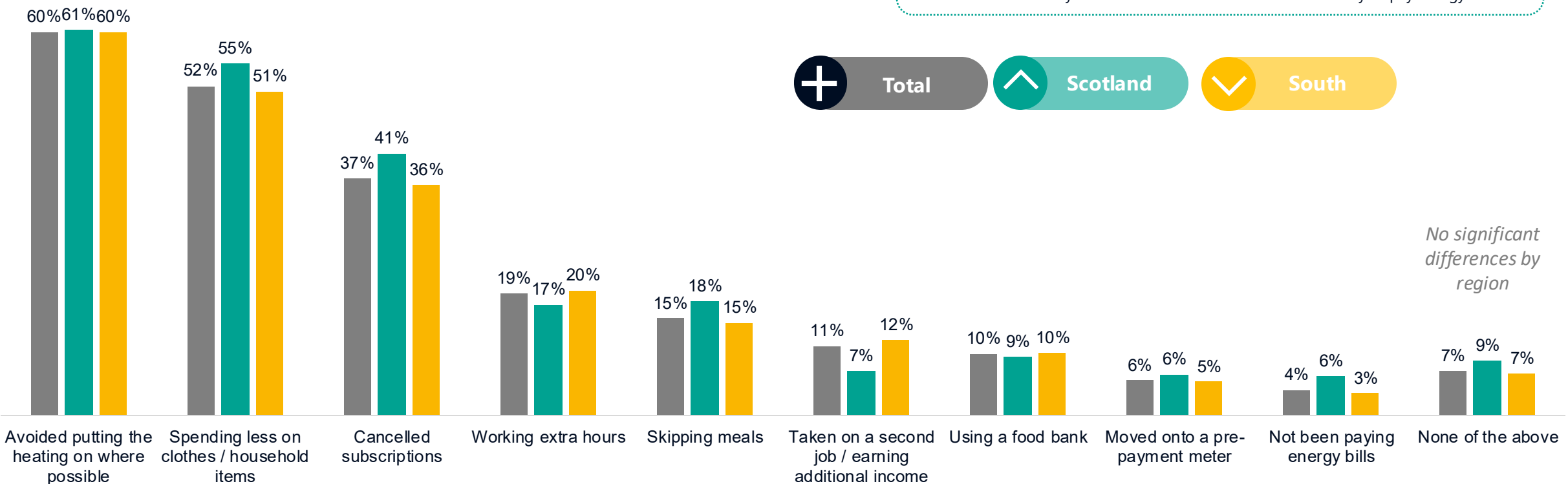
↓ Significantly lower



For those struggling to pay bills, the main changes made include avoiding putting the heating on, spending less on household items and cancelling subscriptions. There are no significant differences by region.

## Actions taken in past year to meet energy bills / cost of living

**Significant differences**  
 Those who avoid putting the heating on where possible are more likely to be older (45+), vulnerable, have developed health concerns in the last year, experienced a change in income in the last year and less confident in their future ability to pay energy bills.



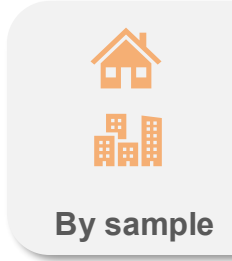
C6. What actions have you taken in the past year to try and meet your energy bills and other costs of living?  
 Total domestic sample struggling to pay bills: 851, Scotland struggling to pay bills: 234; South struggling to pay bills : 617

The background image shows a vast landscape with rolling hills and mountains under a cloudy sky. In the foreground, there is a dense forest of tall, thin trees. A large metal power line tower stands prominently in the lower right, with power lines stretching across the scene. An orange banner with white text is overlaid across the middle of the image.

# 08 Awareness / views on SSEN and relationship with electricity

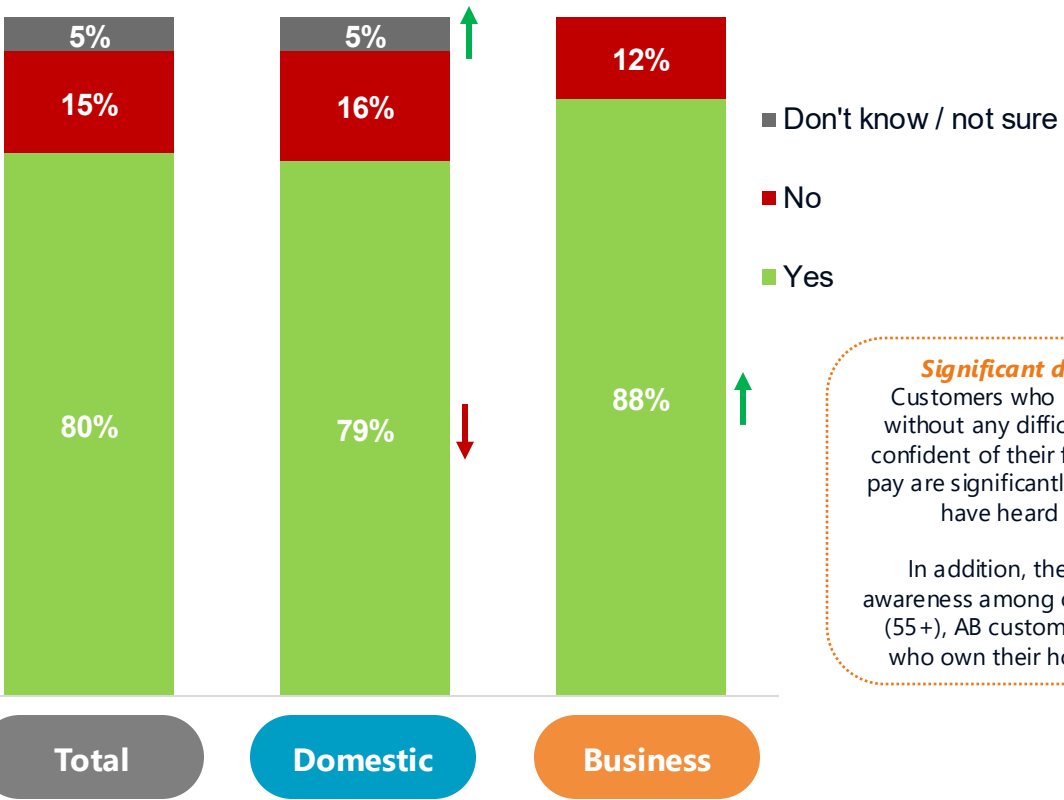
# Awareness / views on SSEN

↑ Significantly higher  
↓ Significantly lower



Four fifths of the sample are certain they have heard of SSEN (79% domestic vs 88% business). While most don't know a lot about SSEN, business customers are more likely to know more.

## Whether they have heard of SSEN



## How well they know SSEN (if heard of)



**Significant differences**  
Customers who pay their bills without any difficulties and are confident of their future ability to pay are significantly more likely to have heard of SSEN.  
  
In addition, there is higher awareness among older customers (55+), AB customers and those who own their home outright.

Q9. Had you previously heard of Scottish and Southern Electricity Networks (SSEN)? Total sample: 2200, Domestic: 2000; Business: 200  
Q10. How well do you feel you know SSEN and the services it is responsible for? Total aware of SSEN: 1,820, Domestic aware of SSEN: 1,644; Business aware of SSEN: 176

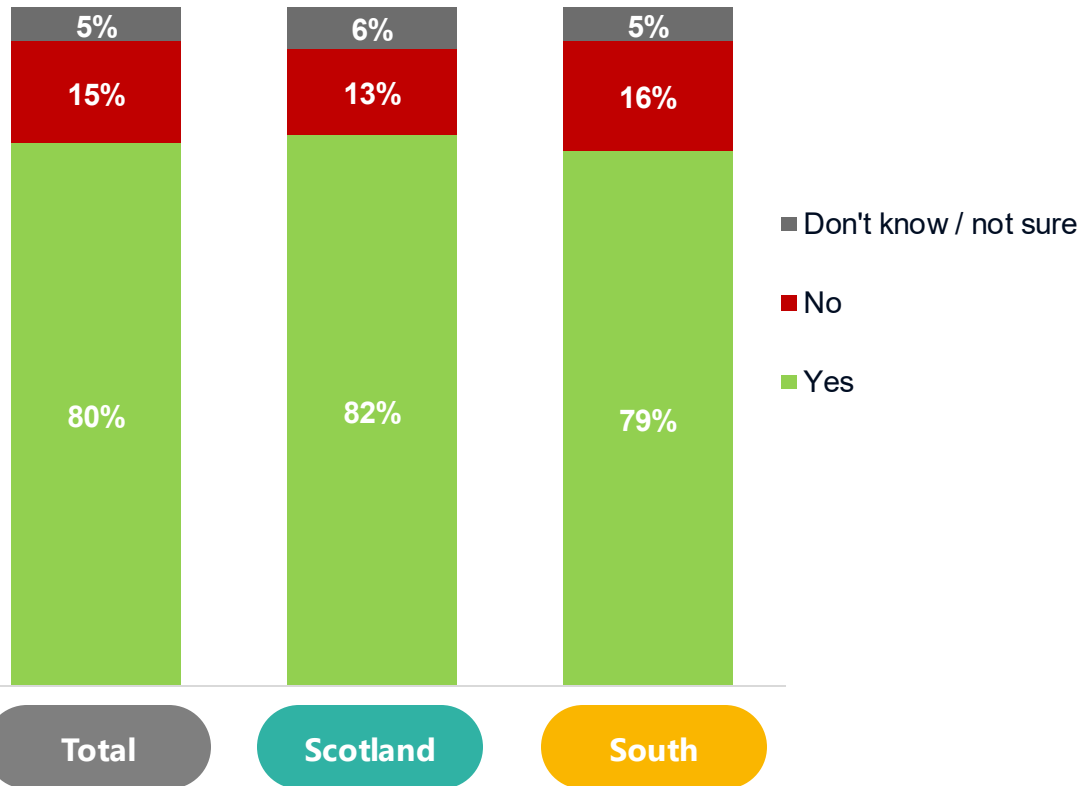
# Awareness / views on SSEN

↑ Significantly higher  
↓ Significantly lower

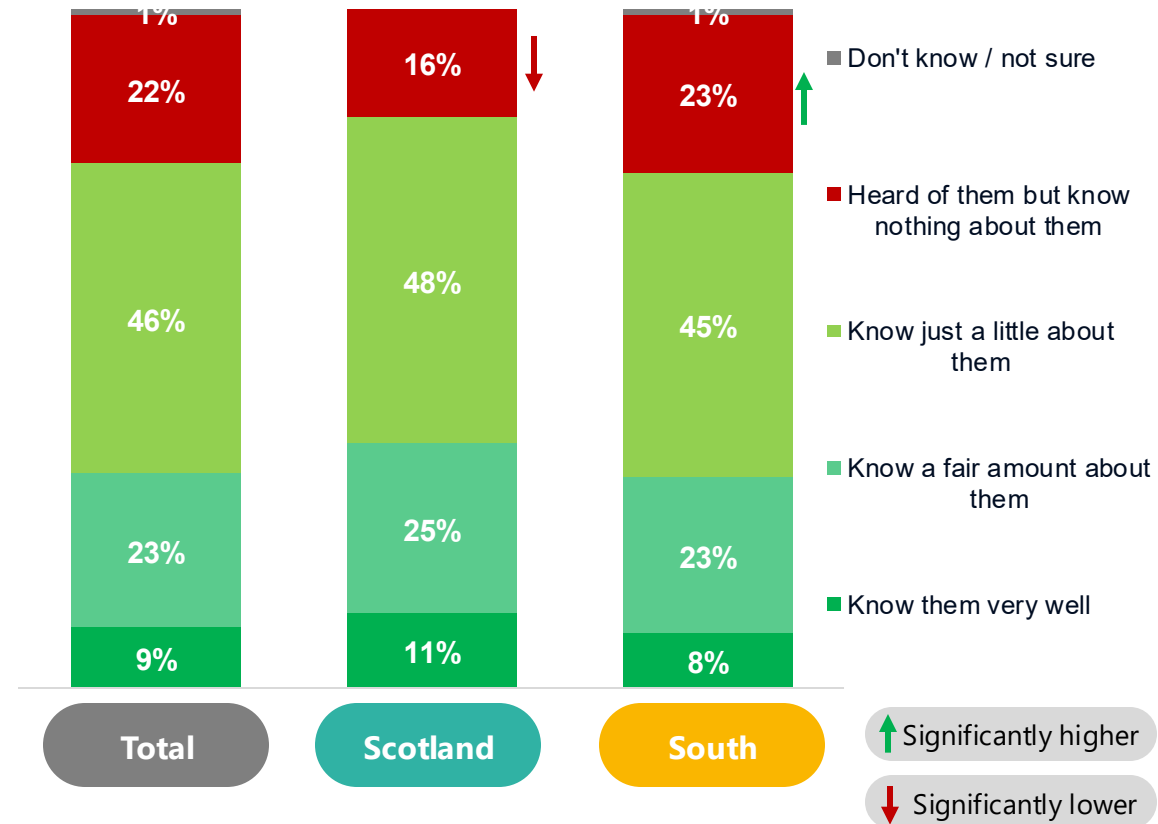


Awareness of SSEN does not differ significantly by region. How well they know SSEN is quite similar overall, with those in the South more likely to have heard of SSEN but know nothing about them.

## Whether they have heard of SSEN



## How well they know SSEN (if heard of)



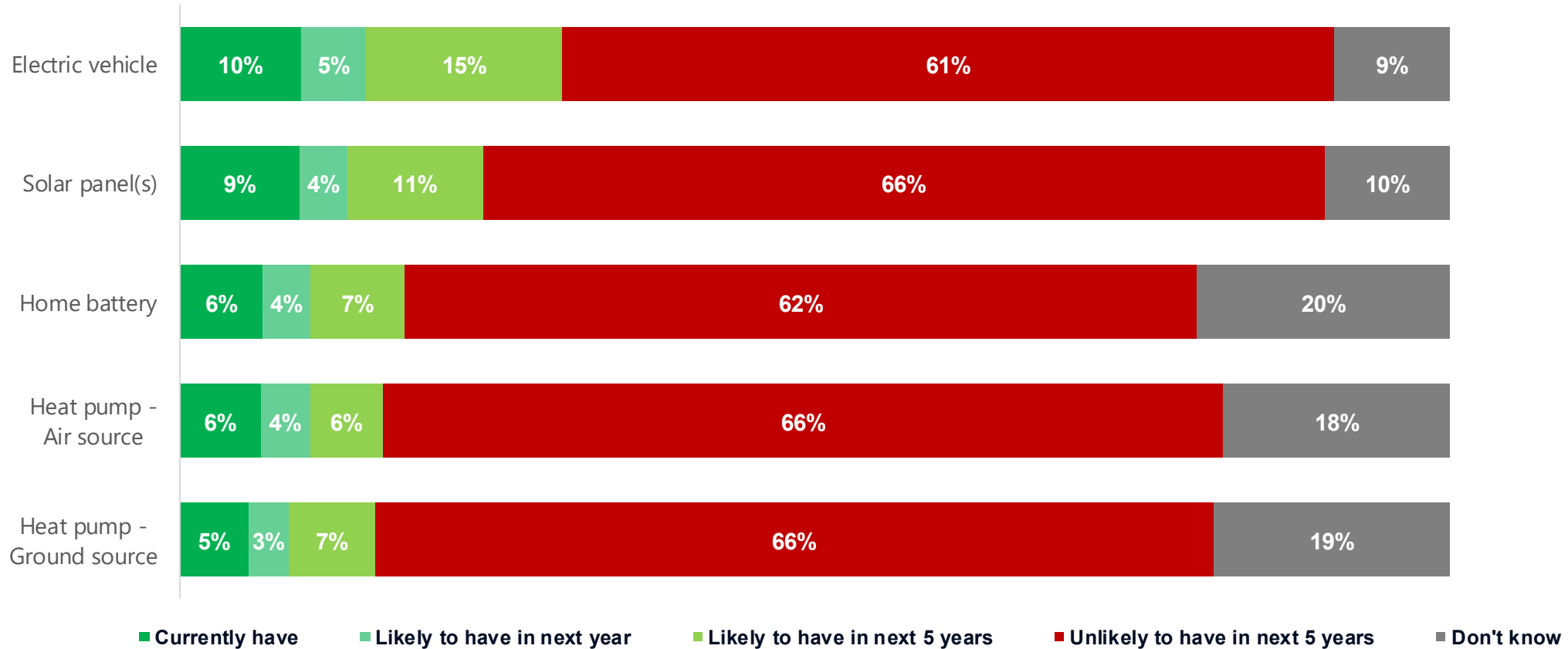
↑ Significantly higher  
↓ Significantly lower

Q9. Had you previously heard of Scottish and Southern Electricity Networks (SSEN)? Total sample: 2200, Domestic: 2000; Business: 200  
Q10. How well do you feel you know SSEN and the services it is responsible for? Total aware of SSEN: 1,820, Scotland aware of SSEN: 465; South aware of SSEN: 1,355

# LCT adoption

Electric vehicles and solar panels are currently the most used LCT and the most likely to be adopted in the next five years. Combining air and ground source heat pumps, heat pumps are also a more common LCT.

Whether currently have any Low Carbon Technology (LCT)



C11. Do you currently use any of the following in your household?  
Domestic: 2,000



[www.createclarityconsulting.com](http://www.createclarityconsulting.com)