Customer views of the Guaranteed Standards Scheme

Final report prepared for the Northern Ireland Authority for Utility Regulation
May 2010

perceptive insight market research
BROAD MIND Consulting

perceptive insight
market research

jacob peterson house
109 bloomfield avenue
belfast
bt5 5ab

t: 0044 2890 737090
f: 0044 2890 737091
www.perceptiveinsight.co.uk

Mr Kevin Shiels
Retail Unit
The Utility Regulator
Queen's House
14 Queens House
Belfast
BT1 6ED

20h May 2010

Dear Kevin

We have pleasure in presenting our final report from the multi-stranded programme of research on customer views of the Guaranteed Standards Scheme (GSS).

We have enjoyed working with you on this project and hope that you have found the findings beneficial.

If you require any further information please do not hesitate to give me a call.

Warm regards

Maureen Treacy

Maureen Treacy
Managing Director

Contents

1. Executive Summary

1.1 Background

The Northern Ireland Authority for Utility Regulation (or the Utility Regulator as it is referred to on a day-to-day basis), exists to ensure that the utility industries in Northern Ireland are regulated and developed within the relevant strategic and legislative parameters.

One of the Utility Regulator's key functions is to protect consumer interests through effective regulation and the setting and monitoring of service standards that utility companies provide to customers in Northern Ireland. To this end, a Guaranteed Standards Scheme (GSS) for the electricity sector in Northern Ireland is already in place. There is a legal basis for implementing such standards in the water sector, and a legislative framework for GSS in the gas sector is under development. GSS are already in place across all three utilities in Great Britain (GB).

In line with the Utility Regulator's statutory remit, the drafting and implementation of GSS requires consultation with a representative sample of affected customers. The Utility Regulator commissioned Perceptive Insight Market Research (PIMR) and Broadmind Consulting to design and conduct a comprehensive study with the aim of establishing the views of both domestic and non-domestic customers on issues relevant to the future establishment (water/gas) or updating (electricity) of Guaranteed Standards Schemes.

1.2 Methodology

The programme of research was multi-stranded, and consisted of a qualitative and quantitative approach to both domestic and non-domestic consumers to allow a comprehensive overview based on both detailed discussions and representative findings.

In terms of domestic utility consumers, the qualitative phase comprised nine group discussions with a range of consumer types across Northern Ireland including older people, young families and people with disabilities. As well as consumer type and location, socio-economic grouping was taken into account in recruiting focus group participants.

The quantitative phase involved a face-to-face household survey of domestic customers (1,503 overall comprised of 1,000 water customers, 1,003 electricity customers and 1,003 gas customers). Interviews were conducted with the head of the household or the person most responsible for dealing with utilities within the household, and the sample was based on the profile of NI householders drawn from census data and mid-year population estimates for Northern Ireland. The domestic survey findings can be taken as representing the views of the Northern Ireland population with an overall margin of error of +/-2.5%.

For non-domestic utility consumers (including not only commercial customers but public service organisations such as hospitals and schools), the qualitative phase consisted of ten depth interviews, while the quantitative phase comprised a telephone survey of 411 organisations. The non-domestic findings can be taken as representing the views of organisations in Northern Ireland with an overall margin of error of +/-4.8%.

Finally, four semi-structured interviews with representatives of leading utility companies across all three sectors were conducted in order to gain an industry perspective on the proposed updating or implementation of GSS.

1.3 Utility companies

Representatives from leading utility companies were confident of the standards of service they currently provide to domestic and non-domestic customers. Core concerns in relation to proposed GSS centred on the gap between the capacity of current systems and that required to successfully implement GSS. On a larger scale, utility companies did not wish to see Northern Ireland's GSS modelled on those implemented in Great Britain due to territorial differences in infrastructure.

As a consequence of concerns about the readiness of current systems and likely infrastructural issues, utility representatives spoke of potential damage to consumer confidence in their companies should GSS be implemented before companies can meet them. A phased-in implementation programme, alongside appropriate exemptions, was seen as necessary in light of these factors.

Representatives from the water and gas sectors suggested that the cost implications of getting systems and infrastructures up to the standard suggested by proposed GSS would be broadly prohibitive and would have to be taken into account in Price Control, leading to the view that increased costs may inevitably be borne by the customer in the end.

1.4 Domestic customers

Awareness

Both the qualitative and quantitative strands of the research found low levels of awareness of the Utility Regulator and its role, of GSS and of GSS payments. While less than one in five respondents (18%) reported being aware of the Utility Regulator, just one in ten (11%) had heard of GSS and one in six (15%) knew about GSS payments. The fact that a larger proportion of people knew about the payments for failing to meet standards than knew about the actual guaranteed standards suggests higher consumer awareness of the implications of GSS than of GSS per se. Overall these findings point to a need to ensure current and future GSS are promoted to raise consumer awareness. The majority of survey respondents (73%) and focus group participants believed individual utility companies should be responsible for making consumers aware of GSS.

Views

However, the concept - if not the terminology - of GSS is readily understood by most domestic customers through their experience with other service providers, particularly telecommunication and satellite television providers. The programme of qualitative research found that domestic consumers tend not to think of standards of service in utilities in the way they might for other services they purchase (such as telecommunications), and while the idea of GSS was welcomed, participants were less certain about the idea of payments for failing to meet standards.

This uncertainty was due mainly to concerns about who ultimately pays for the GSS payments (i.e. would it ultimately be the consumer?), whether such payments would be better reinvested into services rather than passed back to consumers, and whether the standards might be counterproductive in terms of encouraging utility companies to focus on meeting narrow individual standards rather than improving overall service. The Utility Regulator may, in light of this evidence, wish to consider the extent to which standards can – and should – drive investment in utility infrastructures.

Further, many focus group participants suggested that it may be preferable to implement high level fines for utility companies who fail to meet service standards rather than implementing a consumer-focussed payment system. All qualitative participants and nine

out of ten respondents (92%) suggested that it should be the utility companies and their shareholders who bear the ultimate cost of GSS payments.

Despite this, the quantitative survey suggests a significant majority of consumers are in favour of setting guaranteed standards of service, with varying degrees of support according to the aspect of service in question (from a low of 48% to a high of 96%). The majority (86% of respondents) also believe implementing GSS payments where a standard has not been met is a good idea, and that payments are a good way of improving utility services (92% of respondents).

Format of payments

The study indicates that the majority of consumers believe that payments should be made automatically, with most qualitative participants and nine out of ten survey respondents (90%) stating a preference for automatic rather than claimed payments. It was felt that this would be a fair way to treat all consumers and ensure that access to the payments was not restricted to those who know about them and who have the time to make a claim. It could be inferred that this finding is related to the low awareness of GSS and GSS payments noted above, and the feeling that consumers may not be getting something they are entitled to due to lack of knowledge about eligibility.

Exemptions to GSS payments

It is common practice for service providers in general and utility companies in particular to outline circumstances which are seen as exceptional (such as extreme weather conditions) and which exempt companies from guaranteeing normal standards of service. This topic gave rise to mixed views in both strands of the research. Aside from acts of terrorism (43% support for exemptions), the majority of survey respondents thought that utility companies should still have to make payments in exceptional circumstances: almost three-quarters thought that payments should still be made during strike action by employees (74%); two-thirds thought that they should still be made in the case of accidental damage by a third party (66%); and more than half thought they should still be made in extreme weather conditions (56%) or cases of vandalism (54%).

Most participants in the qualitative research recognised that there would be some exceptional circumstances that might impact the utility companies' ability to meet the GSS. Whilst there was a degree of leniency afforded to the companies in these circumstances a few participants were of the view that the companies should be able to cope in exceptional circumstances and therefore GSS should continue to apply. There was also concern that exemptions should not be applied where proper maintenance or suitable human resource management would have sufficed (such as exemptions for supply interruptions due to weather conditions exacerbated by poor maintenance, or industrial disputes). In particular, strike action by employees was not regarded as an appropriate basis for making exceptions to the standards guaranteed to customers.

Consumer priorities

The research indicates that reliability of supply is the prime concern of consumers across all three utilities. According to the representative survey of domestic customers, consumer priorities for the setting of standards were:

- The time taken to restore supply (96% of respondents seeing it as important to have a GSS for this aspect of service);

- Setting a minimum amount of notice for planned interruptions to supply (86% of respondents); and
- Setting a standard for interruptions exceeding the expected time (79% of respondents).

The aspects of service least likely to be regarded as priorities for guaranteed standards of service were:

- The time taken to change a payment method (48% of respondents);
- Having a two hour time slot for appointments (52%, and a notable contrast from the importance attached to this aspect of service within the qualitative research); and
- The time taken to respond to bill queries (59% of respondents).

Generic standards

The research points to a strong desire for consistent standards and payments across each of the three utilities where these are applicable, primarily to make it easier for consumers to understand entitlement in various situations: this was the view of the majority of qualitative participants and 97% of survey respondents. Despite this preference for consistency where possible, the findings suggest that consumers expect levels of payment to reflect the reason for the payment, and specifically the impact on the customer.

Non-domestic survey respondents placed the greatest emphasis on having a GSS ensuring response to emergency call outs within a fixed amount of time, with 90% of survey respondents wishing to see a standard for this aspect of service, and just over half (53%) suggesting it was the most important aspect of generic services.

The qualitative research evidenced dissatisfaction with the typical 'half-day' format of utility appointments (due to the need to take leave from employment), although this was rated less highly by survey respondents (with 52% believing a GSS guaranteeing a two-hour time slot was important). Missed appointments in particular were viewed unacceptable, but both participants and respondents felt that 24 hours notice that an appointment cannot be kept was sufficient.

The tables below provide a summary of qualitative and quantitative feedback on a range of GSS covering generic areas of service.

Generic standards – queries, complaints and appointments			
Aspect of service	**Appointment setting/keeping**	**Dealing with complaints**	**Meter accuracy queries**
Standard	Customer can request a 2 hour time slot within morning/afternoon set by utility company; Utility company must give 24 hours notice if unable to keep appointment	Utility company will respond to complaints within 10 working days	Utility company will make an appointment within 7 working days; If a visit is not required, an explanation will be provided within 5 working days
Payment level	£20	£20	£25
Current in NI? (Electricity)	No	No	Yes
Current in GB?	Yes (Gas and Water)	Yes (Gas and Water)	Yes (Gas: payment level £20)
Importance to consumers	Medium	Medium	Medium
Satisfaction with proposed terms (qualitative)	High	Low	Low
Satisfaction with proposed terms (quantitative)	High	Low	Low
Recommended revisions	• 1-2 days notice that appointment cannot be kept regarded as minimum required • Telephone contact 20-30 min before appointment seen as convenient	• 10 working days regarded as sufficient so long as a resolution (rather than just acknowledgment of the complaint) is guaranteed	• Timescale seen as excessive – 5 working days suggested • Clarify the GSS – is timescale to arrange an appointment or to arrange and visit? • Timescale should begin from the time the consumer makes the company aware, even if the query was raised outside of standard working hours

Generic standards – payment/billing issues			
Aspect of service	**Bill/payment queries**	**Changing method of payment**	**Making refunds**
Standard	Utility company will respond to query in 5 working days	Utility company will respond to request to change payment method within 5 working days	Utility company will make any due refunds within: • 5 working days (qualitative); or • 10 working days (quantitative)
Payment level	£25	£20	£25
Current in NI? (Electricity)	Yes	No[1]	Yes
Current in GB?	Yes (Water: 10 working days)	Yes (Water)	No
Importance to consumers	Medium	Low	Medium
Satisfaction with proposed terms (qualitative)	Low	High	High
Satisfaction with proposed terms (quantitative)	Medium	High	Medium
Recommended revisions	• Timescale seen as excessive for routine queries; • GSS should guarantee resolution of query within given timeframe rather than response only	• None	• 10 day timescale seen as excessive; • 5 day timescale seen as acceptable

[1] Although a standard exists for voltage complaints

Supply standards

The research found that reliability of supply is crucial to consumer satisfaction with utilities. In particular, focus group discussions pointed to the importance of knowing what to expect and to a desire to be kept informed in the event of planned and unplanned interruptions.

A slight majority of survey respondents believed that restoration of supply in normal conditions should be guaranteed within 4 hours; this finding was consistent across all three utilities, but was reported by a higher proportion of electricity respondents (59%) than gas (51%) or water respondents (54%).

The table below summarises participant and respondent views on GSS relating to supply issues.

Utility supply standards – electric, gas, water		
Aspect of service	**Time taken to restore supply (normal conditions)**	**Notice for planned interruption to supply lasting more than 4 hours**
Standard	Utility company will restore supply within 24 hours	Utility company will provide at least 3 days notice in writing of planned interruptions
Payment level	£50 +£25 for each additional 12hrs	£25
Current in NI? (Electricity)	Yes	Yes
Current in GB?	Yes (Gas: £30 +£30 for each additional 24hrs)	Yes (Water: 48 hours notice; Gas: 5 working days notice)
Importance to consumers	Very High	High
Satisfaction with proposed terms (qualitative)	Low	High
Satisfaction with proposed terms (quantitative)	Low	High
Recommended revisions	• Shorter restoration time • Consumers across all three utilities believe restoration in normal conditions should be guaranteed within 4 hours	• Standard should also guarantee the company's response if the interruption lasts longer than expected and stated

Electricity services

Quantitative findings suggest that electricity services are not problematic for the majority of consumers, with just one in ten (10%) having experienced a problem or issue with their electricity in the previous 12 months, and the majority of these related to bill or payment queries.

With qualitative findings pointing to continuity of supply as the single most important aspect of services for consumers across all three utilities, the quantitative findings suggest such interruptions affect a minority of electricity consumers (74% of respondents reported no supply interruptions in the previous 12 months and power was restored within 4 hours for 60% - the largest proportion - of these).

The following tables provide an overview of opinion of current electricity GSS.

Electricity standards – Fuses and meter problems		
Aspect of service	**Main fuse replacement**	**Pre-payment meter problems**
Standard	Utility company will replace within 3 hours during a working day and 4 hours on any other day	Utility company will respond within 3 hours during a working day and 4 hours on any other day
Payment level	£25	£25
Current in NI? (Electricity)	Yes	Yes
Current in GB?	Not applicable – research asked about NI Electricity standards only	
Importance to consumers	Medium	Medium
Satisfaction with proposed terms (qualitative)	Medium	Medium
Satisfaction with proposed terms (quantitative)	N/A	N/A
Recommended revisions	• Timescale should begin from time consumer makes company aware of issue – whether inside working hours or not	• In cases where supply is affected, timescale should begin from the time the company is made aware of the issue – whether inside working hours or not

Electricity standards – Quoting & connecting new supply/voltage			
Aspect of service	**Providing an estimate for a new supply**	**Connecting a new supply**	**Voltage complaint**
Standard	Utility company will provide estimate within 7 working days for small jobs and 15 working days for large jobs	Utility company will connect a new domestic supply within 2 working days	Utility company will make an appointment within 7 working days; If a visit is not required, an explanation will be provided within 5 working days
Payment level	£50	£25	£25
Current in NI? (Electricity)	Yes	Yes	Yes
Current in GB?	Not applicable – research asked about NI Electricity standards only		
Importance to consumers	Low	Medium	Medium
Satisfaction with proposed terms (qualitative)	Low	Medium	Low
Satisfaction with proposed terms (quantitative)	N/A	N/A	N/A
Recommended revisions	• Shorter timescale desired for both small and large jobs	• Prioritisation of those with no alternative accommodation	• Clarify the GSS – is timescale to arrange an appointment or to arrange and visit? • Quicker response time • Preference for issue to be resolved rather than receive GSS payment

Gas services

The research found differences between domestic and non-domestic experiences of gas services, with a much higher level of issues evidenced for domestic customers. One in ten domestic respondents (11%) had experienced at least one interruption to supply in the previous 12 months, and almost half (49%) of these interruptions were reported as lasting longer than 24 hours. It is worth noting that the level of reported interruptions experienced by domestic customers is higher not only when compared to non domestic customers but also in comparison to the figures recorded by the gas companies themselves. While the survey did not probe to determine the source of the interruption it is fair to assume that some of these interruptions could be due to reasons other than network failure. For example boiler breakdowns and self-disconnection by those who have pre-payment meters could potentially be included in this figure.

One of the main service issues to emerge from the qualitative research was the frequency of meter readings, with many participants stating that they did not know if, when and how often their meter was read. Together, these findings indicate that domestic gas consumers in NI have more service issues than water or electricity consumers.

In line with findings for the electricity sector, the quantitative evidence suggests that the highest proportion of non-domestic gas customers would like to see a GSS in place which guarantees a fixed notice period for planned supply interruptions lasting more than 4 hours, with eight out of ten survey respondents overall believing such a standard was important and four out of ten reporting this to be the single most important aspect of gas services. The largest proportion of respondents regarded 24-48 hours as an appropriate notice period for planned interruptions.

The table overleaf summarises views of GSS standards relating to gas.

Gas standards			
Aspect of service	**Reinstatement of premises**	**Alternative supply for priority customers**	**Problems with pre-payment meters**
Standard	Utility company will return premises to original condition within 5 working days of work completing	During supply interruptions, the utility company will provide alternative heating and cooking facilities for priority domestic customers within 4 hrs (or within 8 hrs if more than 250 non-priority customers are affected)	Utility company will repair or replace pre-payment meters within 4 hours
Payment level	£50	£24	£20
Current in NI?	Not applicable – Current NI standards cover Electricity sector only		
Current in GB? (Gas)	Yes	Yes	Yes
Importance to consumers	Medium	High	High
Satisfaction with proposed terms (qualitative)	Low	High	Medium
Satisfaction with proposed terms (quantitative)	N/A	N/A	N/A
Recommended revisions	• Shorter timescale	• Provide clearer definition of priority customers to promote better understanding	• Timescale should begin from time consumer makes company aware of issue – whether inside of working hours or not

Water and sewerage services

The quantitative research suggests that water and sewerage services are the least problematic of the three utilities for consumers, with nine out of ten water respondents (91%) having no service issues in the previous 12 months. However, it should be noted that, unlike gas and electricity customers, water customers have no reason to make contact for billing and payment issues. Of those who had experienced service difficulties, incidents of supply interruption, low pressure or external flooding were the most common issues.

Eight out of ten respondents (83%) had experienced no interruptions to their water supply in the previous 12 months; of those who had interruptions, four out of ten (40%) were of less than 4 hours duration while 15% lasted more than 24 hours.

Consumer priorities for the sector lie around guaranteed standards for internal and external sewer flooding (97% of respondents believing each should have a standard), with the time taken to respond and the time taken to resolve the problem with the sewerage system being the most important aspects of the standard.

The table below summarises views of GSS standards relating to water.

Water standards - flooding and pressure			
Aspect of service	**Internal flooding from sewers**	**External flooding from sewers**	**Low water pressure**
Standard	Utility company will make GSS payment	Utility company will make GSS payment	GSS payment made if pressure is below minimum standard on 2 occasions lasting more than 1 hr within 28 days
Payment level	Amount equal to annual sewer charges (min £150-max £1,000)	Amount equal to half annual sewer charges (min £75-max £500)	£25
Current in NI?	Not applicable – Current NI standards cover Electricity sector only		
Current in GB? (Water)	Yes	Yes	Yes
Importance to consumers	Very High	Very High	High
Satisfaction with proposed terms (qualitative)	Low	Low	Low
Satisfaction with proposed terms (quantitative)	Low	Low	N/A
Recommended revisions	• Standards should specify aspects of response. • Aspects in descending order of importance: ○ Time taken to respond ○ Time taken to resolve problem ○ Time taken and assistance with cleaning ○ Time taken to provide compensation ○ Information/explanation		• Preference for pressure issue to be resolved rather than receive GSS payment

1.5 Non-domestic customers

Awareness and views of GSS

Despite a low awareness of current GSS within the electricity sector (17% of non-domestic customers), the idea of GSS across utilities was widely welcomed (by all qualitative interviewees and 91% of survey respondents). GSS were viewed as a means of driving and sustaining improved service, although there was cynicism regarding how realistic the specific levels of service contained within the current electricity and proposed gas and water GSS were, and how strictly these standards would be enforced.

A key finding was that qualitative interviewees showed little desire to see GSS payments implemented for non-domestic customers, suggesting that the payment levels in conjunction with the administrative costs of recouping due payments rendered them at best irrelevant and at worst a net loss to consumers like them. Survey respondents showed greater support for GSS payments, with more than three-quarters (79%) believing payments would be a good mechanism to ensure standards are met (7% suggested payments would not achieve this goal and a relatively high 14% reported being unsure).

Generic services

As for domestic consumers, the research suggests that supply reliability is the main concern for non-domestic consumers. Also in line with the findings for domestic consumers, there was a strong desire amongst non-domestic consumers for standardisation of as many GSS as possible across utilities to provide standards that would be uniform and easy for customers to understand.

Within the generic aspects of service, non-domestic customers placed the greatest emphasis on having a GSS ensuring response to emergency call outs within a fixed amount of time, with nine out of ten survey respondents (90%) wishing to see a standard for this aspect of service, and over half (53%) suggesting it was the most important aspect of generic services.

Electricity services

The research found that non-domestic consumers generally had good experiences of electricity services and reliability of supply, with six out of ten non-domestic respondents (61%) having experienced no interruption to supply in the previous 12 months. The qualitative findings also suggest that meter accuracy, billing and communication are problematic for non-domestic consumers, and that there is general dissatisfaction with current tariffs.

Both the qualitative and quantitative research showed that supply reliability was the prime concern for non-domestic customers. Almost eight out of ten survey respondents (79%) felt that having a fixed amount of notice for interruptions to supply lasting longer than 4 hours was important, while almost one-third (31%) viewed this as the single most important aspect of electricity services.

There was also significant support for a GSS in relation to the time taken to respond to issues, with a similar proportion of respondents (76%) feeling such a standard was important, and over one-fifth (21%) seeing this as the single most important aspect of service to consider in developing GSS for the electricity sector.

Gas services

Both the qualitative and quantitative strands of the research indicate that non-domestic customers' most positive utility experiences are in relation to gas, with 97% of survey

respondents having experienced no interruption to supply in the previous 12 months. Despite this, the evidence points to a higher degree of emergency call outs for gas consumers than for water or electricity consumers (12% compared to 7% and 8% respectively).

In line with findings for the electricity sector, the largest proportion of non-domestic gas customers wanted to see a GSS in place that guarantees a fixed notice period for planned supply interruptions lasting more than 4 hours, with eight out of ten survey respondents (80%) thinking such a standard was important and almost half (48%) seeing this as the single most important aspect of gas services for consideration in implementing GSS.

Water and sewerage services

Of the three utilities, non-domestic water customers had the least positive consumer experiences. This is reflected not only by comments about difficulties with communication and responsiveness made in the qualitative phase of the research, but also by the quantitative finding that the water sector had the highest level of complaints (9% compared to 4% in each of the other two utility sectors) and the highest incidence of interruptions to supply up to both 12 hours' duration (7% compared to 1% in gas and 5% in electricity) and 24 hours' duration (5% compared to 1% in gas and 0% in water). Meter accuracy and cost were highlighted as non-domestic consumer concerns within the sector.

Ensuring the quality of drinking water was seen as the highest priority in relation to proposed GSS for the water and sewerage sector, with eight out of ten survey respondents (84%) seeing this as important and almost one-third (30%) seeing it as the single most important aspect of services. However, reliability of supply remained a core concern with eight out of ten respondents (84%) wishing to see a GSS for having a fixed period of notice for supply interruption of longer than 4 hours and just over one-fifth (22%) seeing this as the single most important aspect of services.

Overview of priorities

The table below illustrates non-domestic respondents' consumer priorities according to the proportion believing that aspect of service should have a GSS as well as the proportion proposing that aspect was most important for consideration as a GSS within the generic or specific utility categories.

Non-domestic priorities			
Importance to non-domestic consumers	**1 (highest)**	**2**	**3**
Aspect of Service	**Response to emergency call outs in a fixed amount of time**	**Fixed notice of planned interruptions to supply lasting longer than 4 hours**	**Ensuring quality of drinking water**
Utility	Generic – across electricity, gas and water	Generic, but strongest support evidenced within the electricity and gas sectors	Water
Standard	Setting a maximum time within which the utility company will respond to an emergency call out	Setting a minimum notice period for planned interruptions to supply	Setting and guaranteeing a minimum quality level for drinking water to meet

2. Introduction

2.1 Background

The Northern Ireland Authority for Utility Regulation, or the Utility Regulator as it is referred to on a day to day basis, was first established in 1992 following the privatisation of the Northern Ireland electricity industry. This role was subsequently extended in 1996 to cover gas, and in April 2007 the Utility Regulator also became the economic and customer service regulator for Northern Ireland's water and sewerage sector.

The Utility Regulator's role is to ensure that the utility industries in Northern Ireland are regulated and developed within the strategic policy parameters set out by Ministers and in the relevant legislation. The Utility Regulator exercises its broad range of functions in line with statutory duties set out in the Energy (Northern Ireland) Order 2003 and the Water and Sewerage Services (Northern Ireland) Order 2006.

The main function of the Utility Regulator is to protect customer interests through effective regulation. This is achieved by:

- Protecting the interests of current and future consumers by effective and transparent scrutiny and regulation of regulated companies;
- Issuing and maintaining licences for gas, electricity and water companies to operate in Northern Ireland;
- Protecting vulnerable utility customers in Northern Ireland;
- Ensuring that utility companies comply with the relevant legalisation and licence obligations;
- Encouraging regulated companies to be more efficient and responsive to customers;
- Controlling the prices that utility companies charge to customers in Northern Ireland;
- Working to encourage competition in the gas and electricity markets;
- Setting and monitoring standards of service which utility companies provide to customers in Northern Ireland;
- Acting as an adjudicator on certain customer complaints, disputes and appeals; and
- Carrying out its duties with the environment and sustainability in mind.

2.2 Guaranteed Standards Scheme

In its role of setting and monitoring standards of services that utilities provide to customers in Northern Ireland, the Utility Regulator already has in place a Guaranteed Standards Scheme (GSS) for the electricity sector and a legal basis for implementing such standards in the water sector. The gas sector does not yet have the similar legislative framework in place for GSS but this is under development and is likely take up to 18 months to implement.

The electricity GSS has established standards for a range of services including replacing the main fuse, restoring electricity after a fault, installing a meter and turning on the supply, providing a cost for a new electricity supply, dealing with complaints about voltage, meter accuracy queries , queries about bills and payments, keeping appointments and dealing with problems related to pre-payment meters.

Although the GSS scheme is yet to be agreed for the water sector, this type of scheme already exists in GB and includes standards for making and keeping appointments, responding to account queries, responding to complaints, interruptions to the water supply, planned interruptions, unplanned interruptions, sewer flooding, low pressure, payments and compensation in the event of drought.

In Great Britain (GB), gas transporters operate to guaranteed service standards in relation to supply restoration, reinstatement of customer's premises, provision of heating and cooking facilities for priority domestic customers, notification of planned supply interruptions, responding to complaints, the provision of new connections and quotations, responses to enquiries, provision of commencement and completion dates, and payments.

2.3 Establishing the views of customers

The Utility Regulator's existing statutory remit for the electricity and water sectors require it to establish the views of a representative sample of affected customers prior to implementing a GSS for those sectors. As such, the Utility Regulator wished to commission a comprehensive research study with the aim of establishing the views of customers on issues relevant to the future establishment (water/gas) or updating (electricity) of Guaranteed Standards Schemes.

A cross-directorate working group comprising the Utility Regulator, the Consumer Council and the Northern Ireland Statistics and Research Agency (NISRA) was established to support the programme of research. The objective of this group was to report to the Utility Regulator's Senior Management Team on proposals for the use of external professional expertise in the project fieldwork, potential data protection concerns, initial assessment of the options for, and focus of, the quantitative element of the research.

2.4 Terms of reference

The Utility Regulator commissioned a team from Perceptive Insight Market Research (PIMR) and Broadmind Consulting to design and implement an appropriate programme of research. The study encompassed both qualitative and quantitative research techniques and included both domestic and industrial/commercial customers. The overall objectives of the research were:

- To design a robust programme of research with affected customers, including sampling and questionnaire design;
- To implement the research with customers to assess their views and opinions on the GSS as it applies to electricity, water and gas;
- To provide a comprehensive report detailing the key findings from the research and the implications and recommendations for each of the utility sectors; and
- To maintain a close working relationship with the Utility Regulator project team at all stages of the project.

The programme of research took place between November 2009 and March 2010.

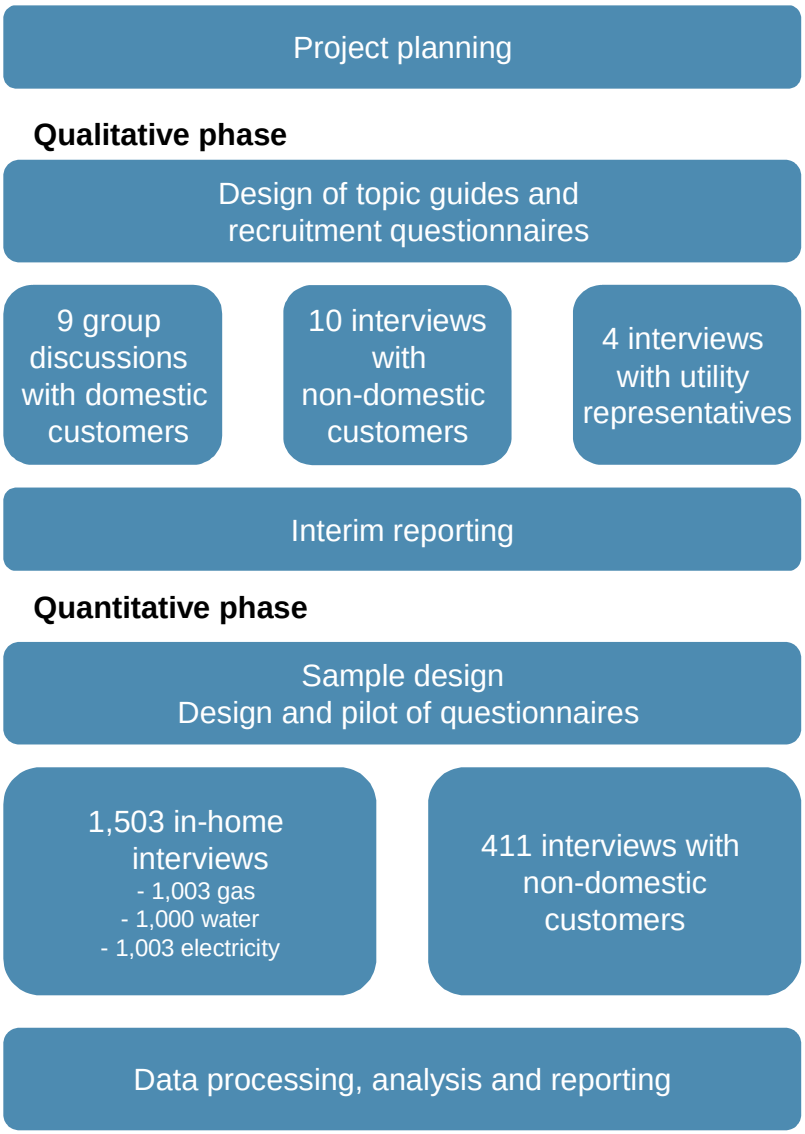
3. Methodology

In this section we provide a brief overview of the steps taken to design and implement the research. Further details can be found in Appendix A.

3.1 Overview

The qualitative phase comprised nine group discussions with domestic customers, 10 in-depth interviews with non-domestic customers and four interviews with representatives of leading utility companies across all three sectors. The quantitative phase involved a telephone survey of non-domestic customers (411 businesses) and a household survey of domestic customers (1503 overall, comprised 1,000 water customers, 1,003 electricity customers and 1,003 gas customers). Figure 3.1.1 below provides a graphic illustration of the main stages of the study, with an overview of the approach outlined in the following paragraphs. Further details are available at Appendix A.

Figure 3.1.1: Overview of approach to the research



3.2 Domestic customers

Qualitative phase

The nine focus groups were recruited to include a range of customer types across Northern Ireland representing the different types of utility consumers (See Appendix A). A topic guide was designed to structure the focus group discussions (see Appendix B). The groups were moderated by our team of experienced research consultants and took place between 1st December and 9th December 2009.

Quantitative phase

A questionnaire and sample frame were designed to measure and assess domestic customers' views in a robust and representative manner. After a pilot of 20 respondents, 1,503 interviews were conducted face-to-face in respondents' homes using a quota based sampling approach based on randomly selected sampling points across Northern Ireland. Interviews were conducted with the head of the household or the person most responsible for dealing with utilities within the household. Interviewing took place between 28 January and 15 March. Sample design was based on the profile of NI householders drawn from census data and mid-year population estimates for NI. (See Appendix A)

3.3 Non-domestic customers

Qualitative phase

10 semi-structured depth interviews were carried out with a range of non-domestic customer types. A number of organisations were identified and selected for interview based on the specified criteria (see Appendix A). A semi-structured topic guide was developed. (See Appendix C). All interviews took place between the 7th December and 17th December.

Quantitative phase

A questionnaire was designed for CATI (Computer Assisted Telephone Interviewing) implementation. A sample frame was designed to achieve 411 interviews with organisations across a range of sizes and sectors as well as across the three utilities (See Appendix A). As the majority of businesses in Northern Ireland are small, the sample was stratified by size and sector, and reweighted at the analysis stage to reflect the Northern Ireland profile. A pilot was conducted with 5 respondents, and interviewing took place between 8 February and 5 March 2010.

3.4 Utility companies

In addition to the research with domestic and non-domestic customers, unstructured interviews were conducted with representatives from four of the leading utility companies, representing an opportunity for the utility companies to contribute to the research.

4. Key findings: views of domestic customers

In this section we provide a detailed analysis of the views of domestic customers in relation to Guaranteed Standards of Service (GSS) across all three utilities. The findings are based on an overview of the key issues that were discussed during the qualitative focus group discussions with domestic customers as well as an outline of views expressed within the quantitative household survey. For further detail on the profile of survey respondents, please see Appendix A.

This section has been structured under the following headings:

- 4.1 Overview of customer priorities;
- 4.2 Overview of customer experience;
- 4.3 Awareness and views of the principle of GSS;
- 4.4 Views on the generic aspects of GSS;
- 4.5 Views on GSS in relation to electricity;
- 4.6 Views on GSS in relation to gas; and
- 4.7 Views on GSS in relation to water.

4.1 Overview of customer priorities

During the qualitative research, prior to the more detailed discussion on current and potential GSS, focus group participants were asked about their previous experience as utility consumers, including questions about dealing with utility companies, their levels of satisfaction and priorities in relation to the supply of electricity, water and gas.

All participants stressed the importance of having a reliable supply of electricity, water and gas. Any interruption was viewed as having an impact, and the longer the interruption the greater the impact. Alongside having a reliable supply participants also commented that affordability of electricity and gas was also a priority. Although water billing was raised as an issue within each group, discussion of this matter was not developed in order to retain the focus on GSS.

Some participants also highlighted, without prompting, the issue of the appointment system within the utilities. The inconvenience of a not being given a specified appointment time was the main cause of dissatisfaction.

In line with the qualitative finding that reliability of supply is the highest priority, the quantitative research found that the aspect that most respondents wanted a GSS for was of the time taken to restore supply (Figure 4.1.1 and Figure 4.1.2). The vast majority (96%) regarded it as important to have a standard for this aspect of service with 78% regarding it as extremely important. Similarly, 86% felt it was important to have a standard guaranteeing a minimum amount of notice for planned interruptions to supply with 60% overall regarding it as extremely important. The third highest priority related to applying a standard to interruptions exceeding the expected time, with over three-quarters (79%) suggesting a standard for this aspect was important and over half (51%) believing this to be very important.

The aspects of service that were less likely to be regarded as priorities for guaranteed standards of service were those relating to the time taken to change a payment method

(48% rating this important), having a two hour time slot for appointments (52% seeing this as important, and the time taken to respond to bill queries (59% seeing this as important). It is interesting to note that the quantitative evidence points to two-hour appointment slots as being of lesser importance than the qualitative evidence suggested.

Figure 4.1.1: Respondent views on whether aspects of generic service should have a GSS (1)

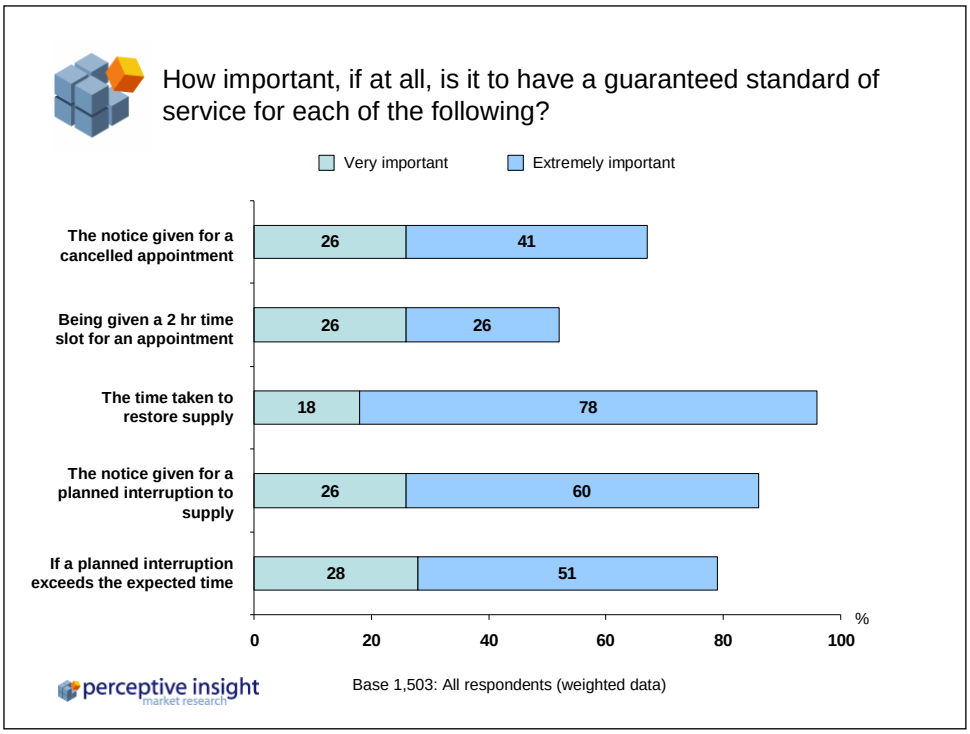
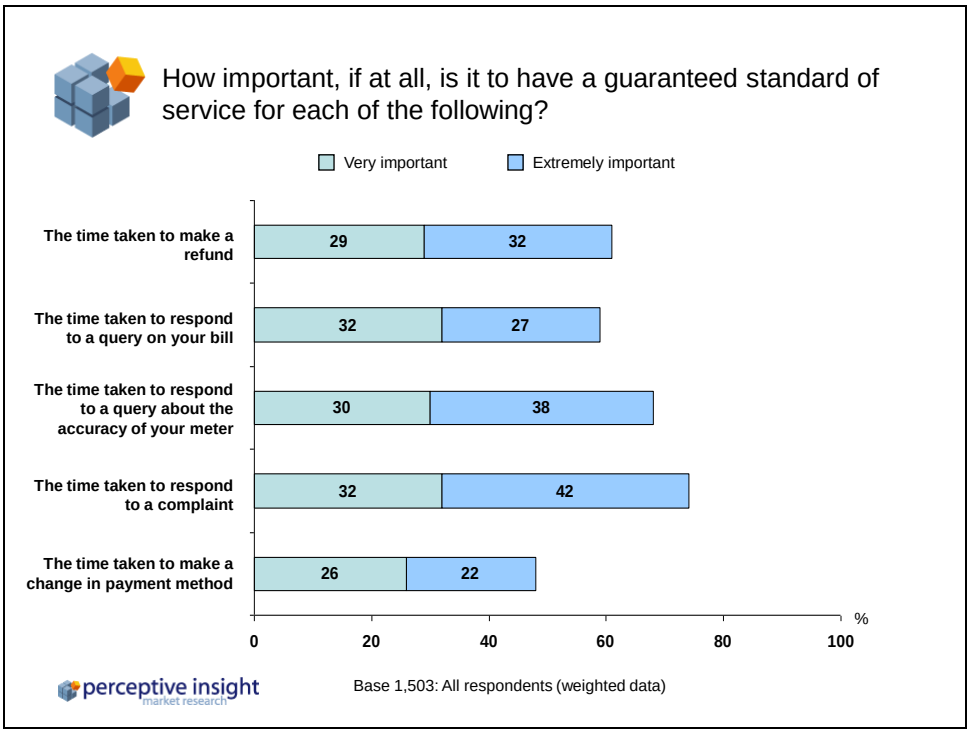


Figure 4.1.2: Respondent views on whether aspects of generic service should have a GSS (2)



Respondents were also given the opportunity to nominate other aspects of service for which they felt it was important to have a GSS (Table 4.1.1).

Table 4.1.1: Other (unprompted) aspects of service for which there should be a GSS

Aspect of service *(Base: All respondents)*	Percentage 1,503 (weighted)
Prices/charges	1%
Water quality	1%
Response times	1%
Maintenance and repairs	1%
Others	2%
No answer	94%

4.2 Overview of customer experience

The qualitative research found that, overall, participants were broadly satisfied with the supply of each of the three utilities, which was their highest service priority. Interruptions to supply were reported as being infrequent, particularly for gas supply.

A number of participants across all areas had recent direct experience of a supply interruption in relation to electricity and a few referred to flooding that had happened in their town in the previous two years. Those who had this experience drew upon it during the discussion. Other prior experience included one participant who had a meter accuracy issue in relation to their electricity. A small number mentioned issues with intermittent low water pressure, which they attributed to the occasional heavy use of water by their neighbours.

These findings were mirrored in the quantitative research, which points to a high level of service and low level of issues across all three utilities (Table 4.2.1). Within electricity one in ten respondents (10%) had experienced a problem or an issue which required contacting the electricity company. The largest proportion had experience of telephoning to query a bill or contacting the company to request a change of payment method. At just 2% of respondents in each of these cases, and with nine out of ten respondents (90%) having experienced no problems or cause to contact their supplier, the survey suggests that electricity services are largely unproblematic for a majority of consumers.

In terms of gas services, interaction with the gas company was highest of all three utilities, with one in five respondents (24%) reporting experience of an issue that required contacting the gas company. The most common reason for this contact was for a pre-arranged visit by the company (7%), although it is fair to say that this could reflect higher rather than lower service standards.

Telephone queries about matters other than billing were the next most common reason for contact with gas companies (6%). While it is not possible to determine conclusively whether this contact reflects service problems or a general tendency to be cautious of safety concerns in relation to gas (e.g. contacting the company if gas can be smelled in the area), we can infer that the level of contact relates to service issues from the finding that the level of supply interruptions in gas (5% more than 24 hours; 7% more than 12 hours) and of complaints (5%) are the highest of all three utilities and in line with the proportion of respondents contacting gas companies (6%). However, with seven out of ten respondents (76%) having experienced no problems or cause to contact their supplier, the survey suggests that gas services are unproblematic for the majority of consumers.

The survey found that water services were the least problematic of the three utilities, although it should be noted that respondents were asked about fewer service aspects of this utility due to the current absence of water metering and charging. Nine out of ten respondents (91%) had experienced no problems or cause to contact their supplier. The most common reasons for contact with NI Water were interruptions to supply, ongoing incidences of low pressure and flooding of external sewers (2% of respondents in each case). Again, with less than one in ten respondents (9%) having reason to contact the water company, the survey suggests that water services are unproblematic for the vast majority of consumers.

Table 4.2.1: Utility experience in the last 12 months

(Base: All respondents)	Utility: Electricity (1,003)	Gas (1,003)	Water (1,000)
Made a telephone call to query a bill	2%	4%	
Made a telephone call to query something else	1%	6%	1%
Made a complaint	1%	5%	1%
Utility company made a pre-arranged visit to your home	0%	7%	1%
An interruption to your supply lasting more than 12 hours	2%	7%	3%
An interruption to your supply lasting more than 24 hours	1%	5%	2%
A query about the accuracy of your meter	1%	1%	
A problem with your pre-payment meter	1%	3%	
Requested a change of payment method	2%	2%	
Had an ongoing issue with low water pressure			2%
Flooding of sewer inside your home			0%
Flooding of sewer outside your home			2%
None of the above	90%	76%	91%

4.3 Awareness and views of the principle of GSS

In the following paragraphs we discuss awareness levels, the reaction of participants to the principle behind GSS, their views on levels of payments, making claims and exceptional circumstances.

Levels of awareness

In the qualitative research, after the initial discussion about the aspects of service that customers value, the discussion then focused on the awareness of standards of service in the utility sector. There was low awareness of the Utility Regulator and its role in monitoring consumer interests in relation to the three utilities.

> *"The general public don't seem to know whether there is a utility regulator."*
> (L'Derry, C2DE, Older people 65+)

There was also little awareness of the term 'guaranteed standards of service'. However, when probed further a small number of participants were able to either guess what the term meant due to knowledge of service standards in other sectors or were vaguely aware of some of the individual standards applied to electricity. This knowledge was due to first-hand experience of electricity supply interruption. However, the terminology 'guaranteed standards of service' was not recognised.

> *"People don't know what the guaranteed standards are. I would never have known this was in place."*
>
> (Belfast, ABC1, Older family)

> *"I have heard of it, but not in utilities, more on consumer buying."*
>
> (L'Derry, C2DE, Lone parents and families)

The lack of awareness of the standards was a key issue for participants. Some thought that customers were deliberately not informed about GSS and wanted more done to promote them.

> *"They keep people in the dark about these things. If you phone them to make a complaint, nobody bothers to tell you about them. If you don't know you don't get."*
>
> (L'Derry, C2DE, Older people 65+)

> *"They need to make people aware, as a lot of people wouldn't know they exist."*
>
> (Belfast, C2DE, younger family)

> *"The Utility Regulator or Trading Standards should make people aware of these."*
>
> (L'Derry, C2DE, Older people 65+)

In line with these findings, the quantitative research showed that there was a low level of awareness of the Utility Regulator, of the GSS and of GSS payments (Figure 4.3.1). While one in five respondents (18%) were aware of the Utility Regulator, just one in ten (11%) were aware of GSS. However, one in six (15%) were aware of payments being warranted for failure to meet a standard of service, which suggests that customers are more aware of the implication of GSS than the standards themselves. Overall these findings suggest that there is much work to do to promote consumer awareness of current GSS.

Just five survey respondents had received a payment in the previous three years. The reason in three of the cases was because they had been without power for more than 24 hours. One payment was made because of a missed appointment and another for not getting a new supply connected within the set time.

Figure 4.3.1: Awareness of the Utility Regulator and GSS

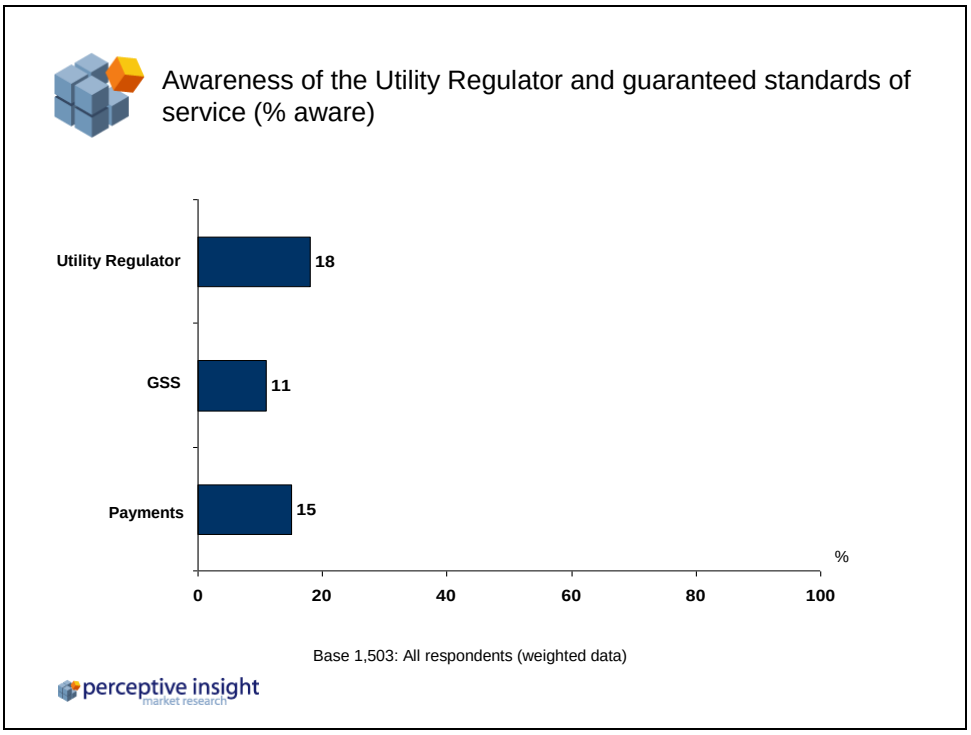


Table 4.3.1 below illustrates a breakdown of this awareness by key demographic groupings. From this we can see notable demographic differences in awareness of all three entities. Awareness of the Utility Regulator was highest among males (23% compared to 14% of females), those aged 30-54 (21% compared to 20% of those over 55 and just 7% of 16-29 year olds) and those classed as ABC1 (26% compared to 11% of the C2DE group).

Awareness of GSS was less differentiated, with the most notable divergence between those in the ABC1 group (15%) and those in the C2DE group (8%). Finally there was little difference in awareness of GSS payments by socio economic grouping. However males (18%) were more likely to be aware than females (13%) and the lowest awareness by age was among 16 to 29 year olds (5%) and highest awareness among those over 55 (18%).

Table 4.3.1: Awareness of the Utility Regulator and GSS (% aware)

	Gender		Age			SEG		Total
(Base: All respondents)	Male (688)	Female (815)	16 to 29 (217)	30 to 54 (725)	55 plus (561)	ABC1 (654)	C2DE (849)	(1503) (weighted)
The Utility Regulator	23%	14%	7%	21%	20%	26%	11%	18%
GSS	13%	9%	5%	12%	13%	15%	8%	11%
Payments	18%	13%	5%	17%	18%	18%	19%	15%

Views on the principle

It is interesting to note that in the qualitative phase the views of participants on guaranteed standards appeared to develop throughout the discussion, not because there was a higher level of awareness of GSS than had first appeared but because the discussion encouraged participants to consider the various issues and the implications of having the standards in place.

Throughout the discussion the overwhelming reaction of customers was that rather than have a payment because of an interruption to supply they would much rather have the actual supply. However, it was acknowledged that there would be times when then supply would not be available and that having a system such as GSS was therefore needed. Participants were keen to point out the GSS payments should be in addition to any compensation they might be entitled to.

> *"Yes, if they're not meeting the standard, then a goodwill payment is a good idea. Are they compensating you as well? They should be compensating you for both, the goodwill gesture, and compensation."*
>
> (Coleraine, under 65 with disability)

> *"I would rather have the service than goodwill payments. I can't understand the point of the payments. Nobody knows about them, they don't make up for bad service. I would rather have the job done right than have a goodwill payment."*
>
> (Belfast, C2DE, younger family)

Some recognised that the GSS payments were one of the methods that could be used to keep utility suppliers in check, particularly in the sectors which lack competition.

> *"A goodwill payment keeps them on their toes. It would raise the standards of service, if it was enforced."*
>
> (L'Derry, C2DE, Older people 65+)

For others the issue was more to do with who ultimately pays for guaranteed standards of service, an issue discussed in further detail later in this section. A number suggested that rather than guaranteeing standards of service, the government should have the power to fine companies for missing service targets.

> *"I think the fine should go to the government rather than the consumer. The government has the power to fine them, we don't. It should come out of their profits."*
>
> (L'Derry, C2DE, Older people 65+)

Others felt that the money spent on GSS payments would be better spent improving the standard of service.

> *"The money should be reinvested in the service rather than spent on goodwill gestures."*
>
> (Omagh, ABC1, Young family)

A few people were sceptical of the GSS and how the utilities might manipulate their approach to dealing with issues so as not to incur charges.

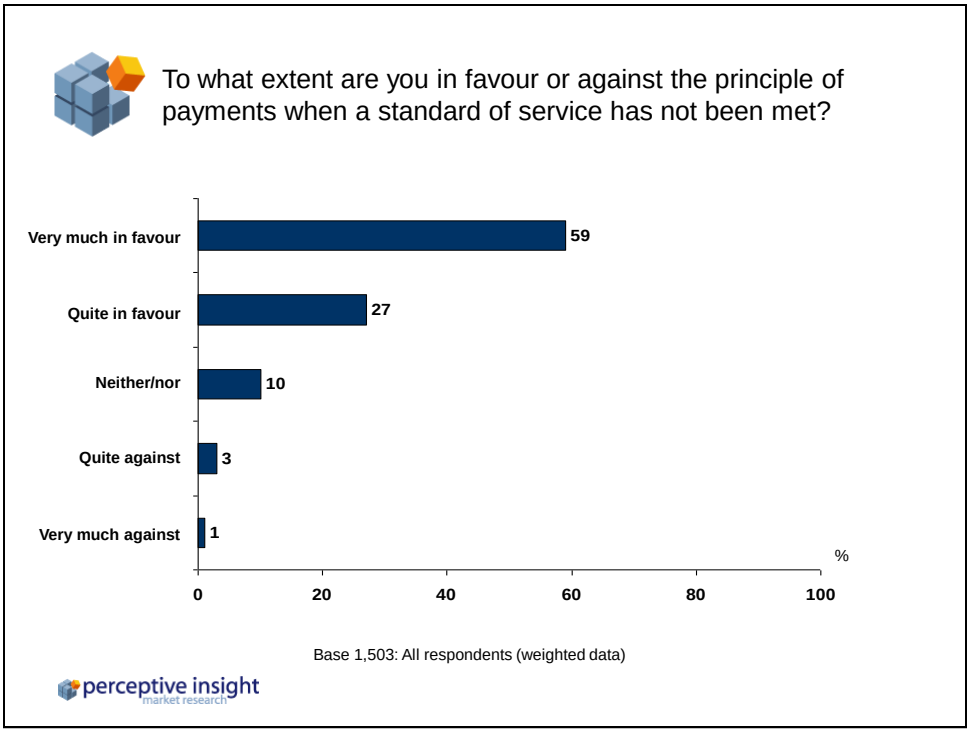
> *"I'd also be worried about targets when it comes to safety. They distort what is actually happening. Even if they are not fully satisfied, they may turn the power back on to meet the target."*
>
> (Newcastle, ABC1, Empty nesters)

Views on GSS payments

The quantitative survey found that the majority of respondents (86%) were in favour of GSS payments where a standard of service has not been met with 59% very much in favour of

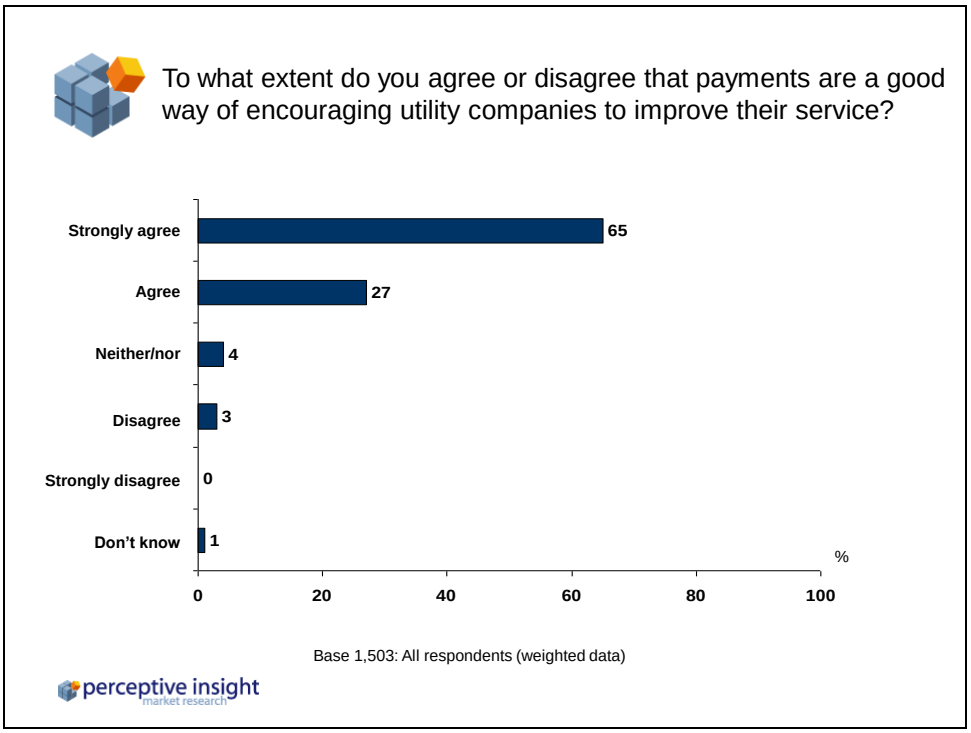
payments and 27% in favour (Figure 4.3.2). Four percent were against the principle (either quite or very against) and one in ten (10%) undecided. There were no significant differences in support or opposition to GSS payments in terms of age, gender or socio-economic group.

Figure 4.3.2: Views on GSS payments where standards have not been met



Nine out of ten survey respondents (92%) agreed that payments are a good way of encouraging utility companies to improve their service with 65% strongly agreeing and 27% agreeing (Figure 4.3.3). Just 3% disagreed with the statement and 4% were undecided. Again, opinions were not significant by age, gender or socio-economic group.

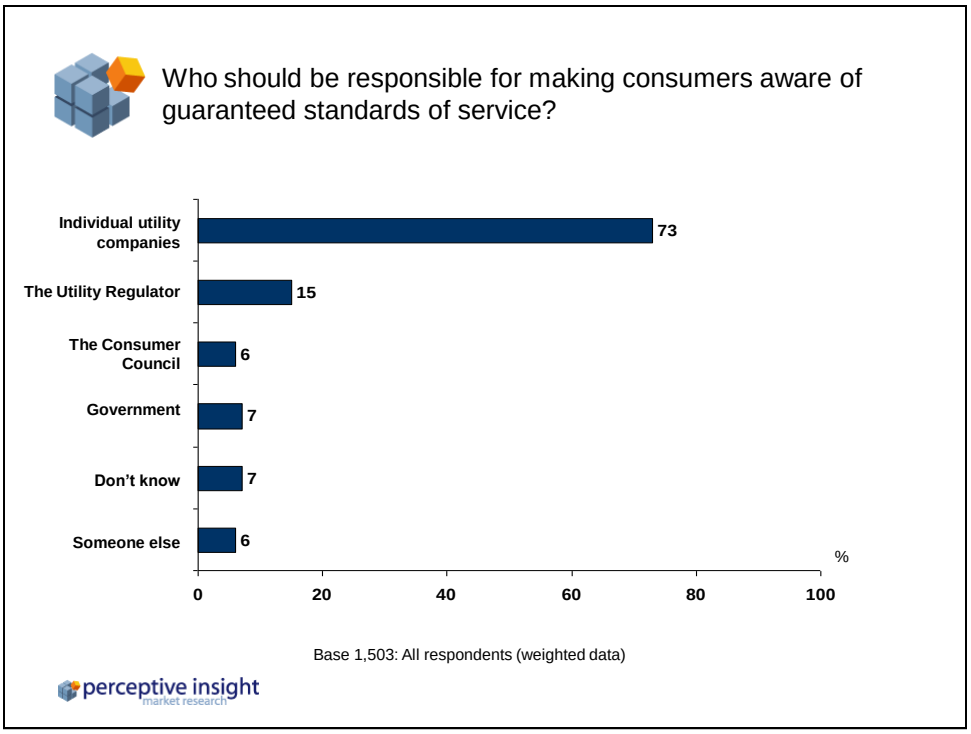
Figure 4.3.3: Views on whether GSS payments will drive service improvements



Views on responsibility for promoting GSS

With regards to responsibility for making consumers aware of GSS, just less than three-quarters (73%) of respondents believed individual utility companies should be responsible, 15% believed the Utility Regulator should have this role, 6% suggested the Consumer Council and 7% suggested the government (Figure 4.3.4).

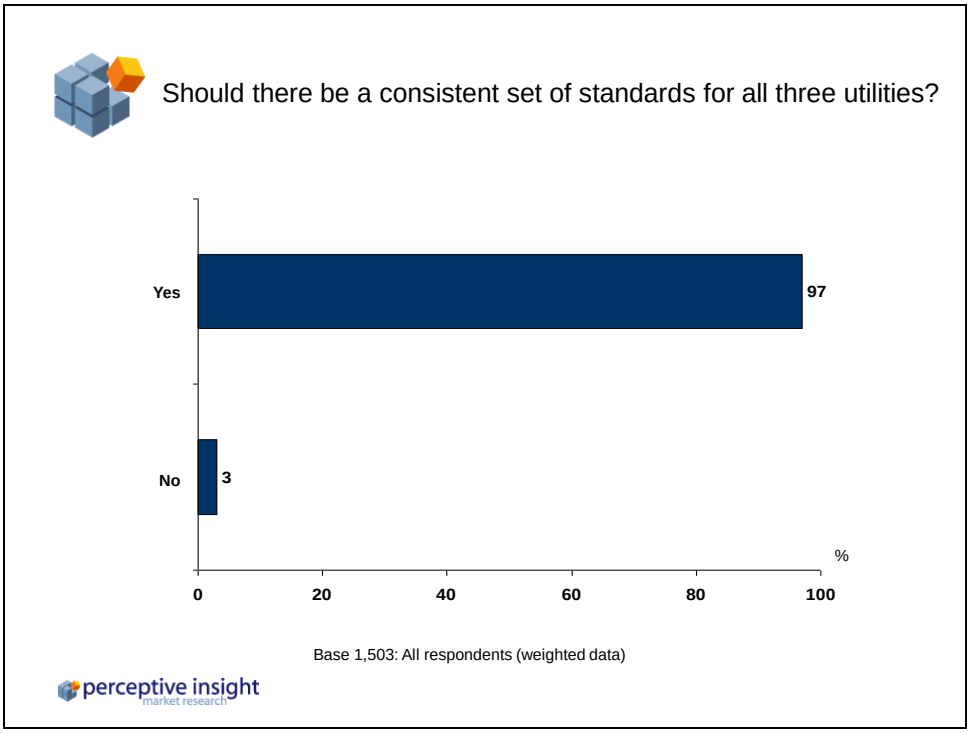
Figure 4.3.4: Views on responsibility for promoting GSS



Views on GSS across utilities

The vast majority thought that there should be a consistent set of standards for all three utilities (97%) (Figure 4.3.5). This finding applied across all ages, gender and socio-economic groups.

Figure 4.3.5: Views on consistent standards across utilities



Views on who meets the cost of GSS

For many focus group participants the issue of who ultimately pays for guaranteed standards of service was a core concern. There were suspicions that it would be the customer who would end up paying for the services rather than the utility companies themselves.

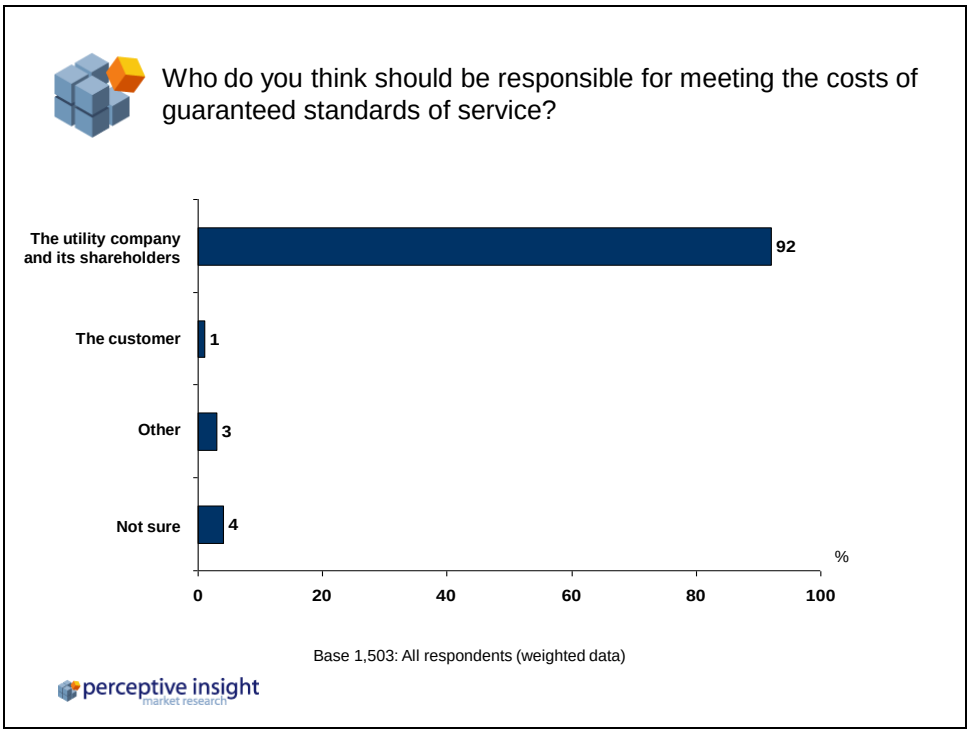
> *"As they have the monopoly, whatever we claim from them we will end up paying next year in electricity prices."*
>
> (Belfast, ABC1, Young professionals)

> *"They shouldn't be giving out the goodwill payments, they should be providing a better customer service. As long as it is a goodwill payment, and it is taken out of their profits rather than our pockets then that is ok."*
>
> (Coleraine, under 65 with disability)

> *"I'm very suspicious of these things. I feel you are going to end up paying for these GSS in water charges. I think if you're going to start water charges, then there should definitely be GSS. It's just whether these are enough."*
>
> (Newcastle, ABC1, Empty nesters)

However it is clear that customers feel it is the responsibility of the utility company and its shareholders to meet the cost of GSS. Over nine out of ten respondents (92%) felt that the utility company and its shareholders should be responsible. Just 1% of respondents felt the customer should meet this cost (Figure 4.3.6).

Figure 4.3.6: Views on responsibility for meeting the cost of GSS



Views on cost, level of payments and making claims

The qualitative research showed that all were in favour of having consistent standards and payments across each of the three utilities where these are applicable. One of the main reasons for this was because it would help customers to understand their entitlement in various situations.

> *"It would be good for them all to be comparable. If they are all the same, then you know your rights and where you should be with each. For example, they should all be available within the same length of time."*
>
> (Belfast, ABC1, Young professionals)

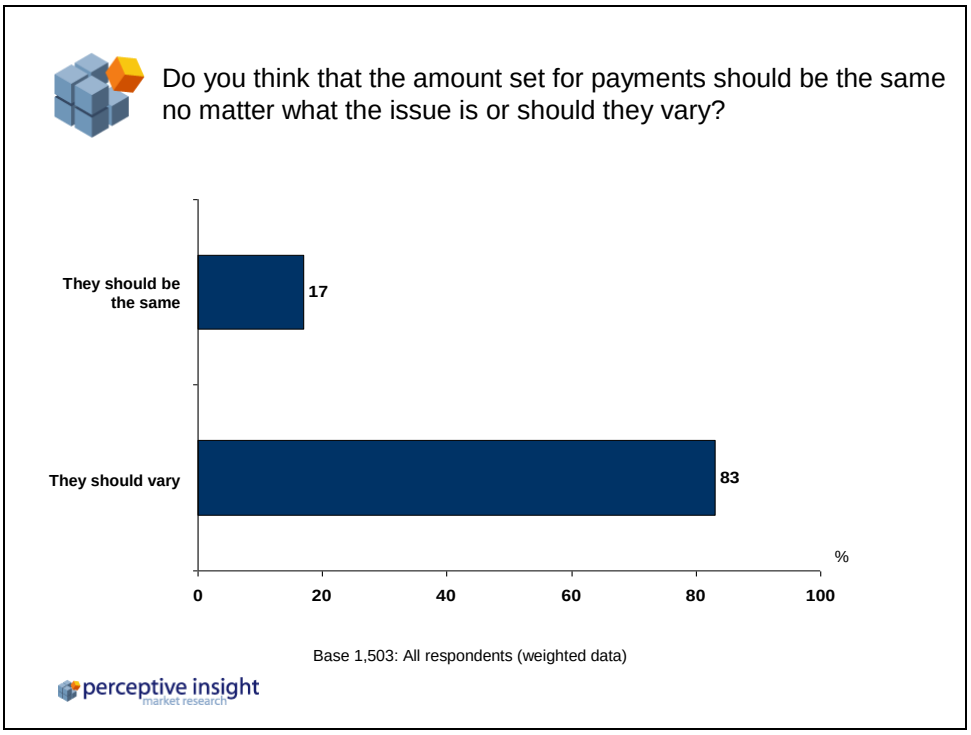
Despite this preference for consistency where possible, participants felt the level of payment should reflect the reason for the payment, and specifically the impact on the customer.

Most participants thought that where there was an interruption to supply this warranted a higher level of payment compared to issues where the supply was not affected. The one exception to this was with regard to appointments. This was because failure to keep an appointment was viewed as a cost to the customer in relation to 'lost time', specifically in terms of time off from paid employment to keep the appointment.

> *"They should be varied, some things are definitely are more important than others. There is a big difference between main fuse and new supply."*
>
> (Omagh, ABC1, Young family)

The qualitative views were echoed in the quantitative research, which found that the eight out of ten respondents (83%) believed the amount set for payments should vary according to the issue. Just 17% thought payments should be the same regardless of the issue involved (Figure 4.3.7).

Figure 4.3.7: Views on responsibility for meeting the cost of GSS



The quantitative research also asked respondents whether they felt a range of generic aspects of service warranted a high, medium or low level of payment (respondents were not asked about specific payment amounts). The survey found that incidences of flooding from sewers were the type of service issues which most respondents believed warranted a high level of payment, with 92% believing internal flooding from sewers should have high payments and 86% believing external flooding from external sewers should have a similar payment level (Figures 4.3.8, 4.3.9 and 4.3.10).

In terms of other aspects of service, the majority wanted to see high payment levels attached to the 'time taken to restore supply' (61%). Views were more mixed in relation to the payment levels for not supplying sufficient notice for a planned interruption with 48% thinking it should be high and 32% considering a medium level of payment should be set. Views were also mixed in relation to payment levels for exceeding the expected time taken for a planned interruption. While 44% thought these should be set high, 36% thought a medium level of payment to be appropriate.

The aspects of service that respondents were most likely to say should not have payments were not providing sufficient notice for a cancelled appointments (13%) and not completing a change of payment in the set time (12%).

Figure 4.3.8: Views on level of payment (1)

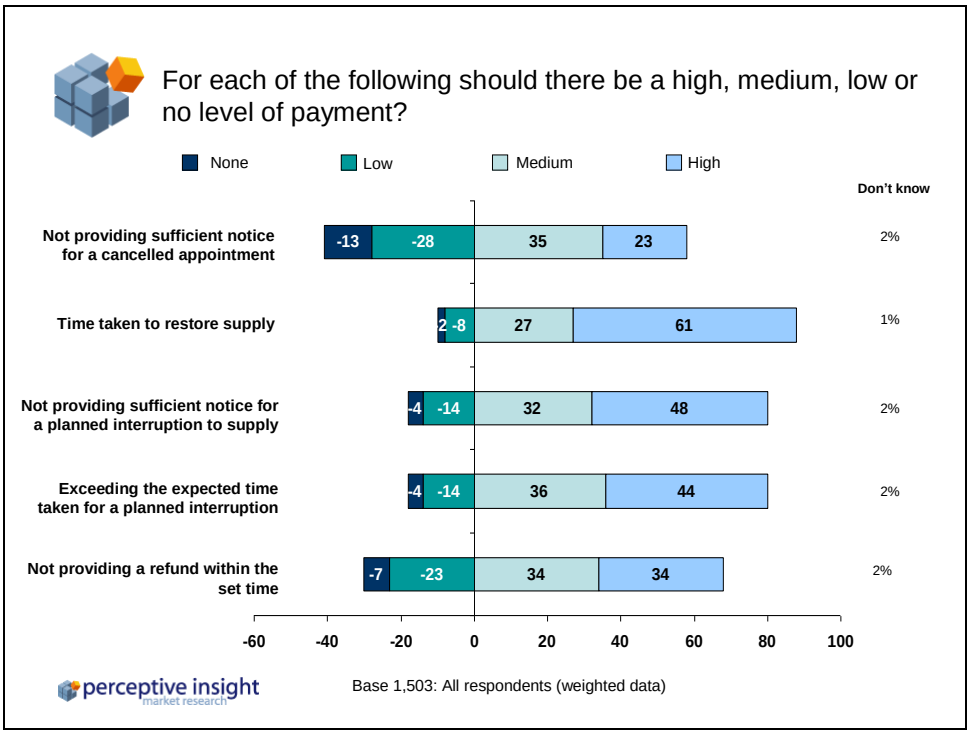


Figure 4.3.9: Views on level of payment (2)

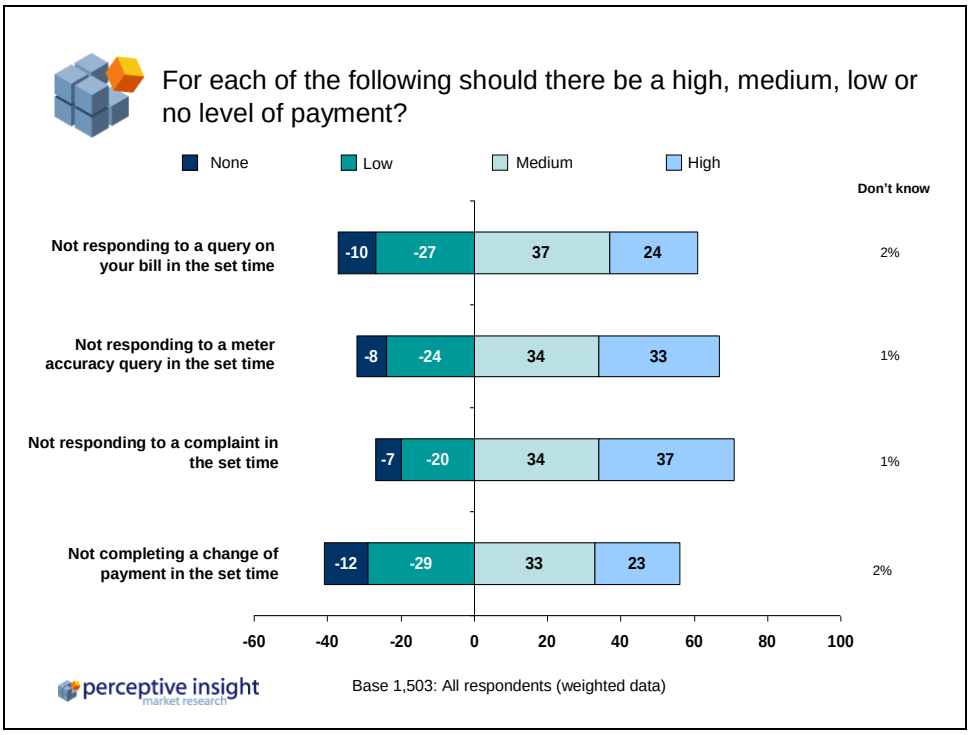
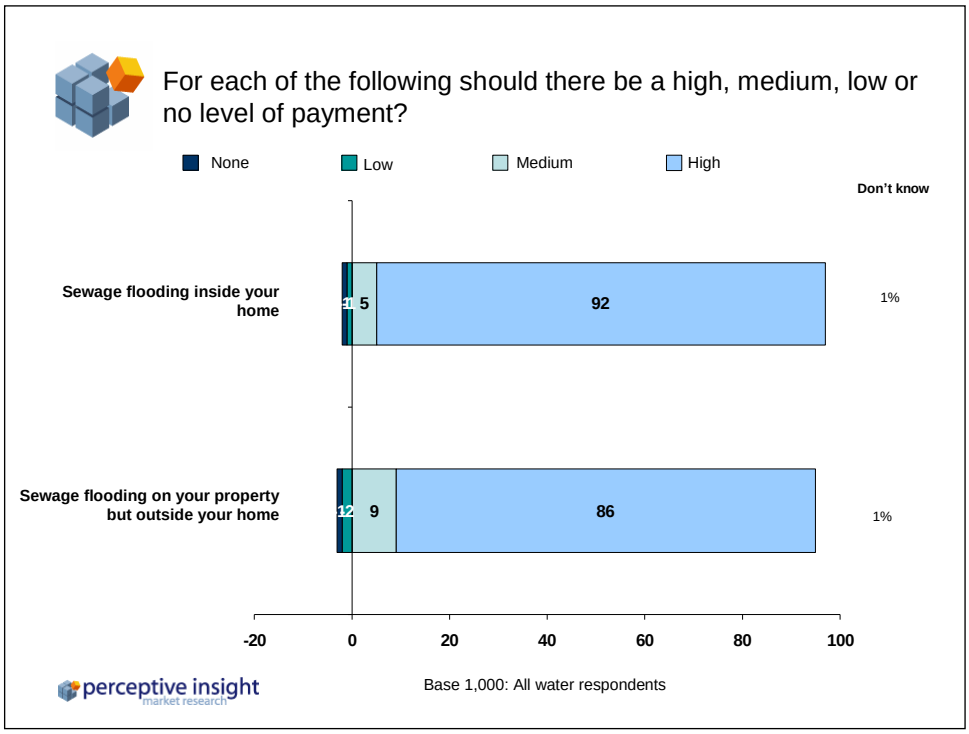


Figure 4.3.10: Views on level of payment (3)



Views on whether payment should be automatic or claimed

The qualitative research found that most participants thought that payments should be made automatically without making a claim. It was felt that this would be a fair way to treat all consumers and *ensure* that access to the payments *was not restricted* to those who know about them and who have the time to make a claim.

> *"The timeliness of claiming it would be an issue. It puts people off. If you're over 80 you're less likely to be stroppy enough to claim it, but you will be the worst affected."*
> (Newcastle, ABC1, Empty nesters)

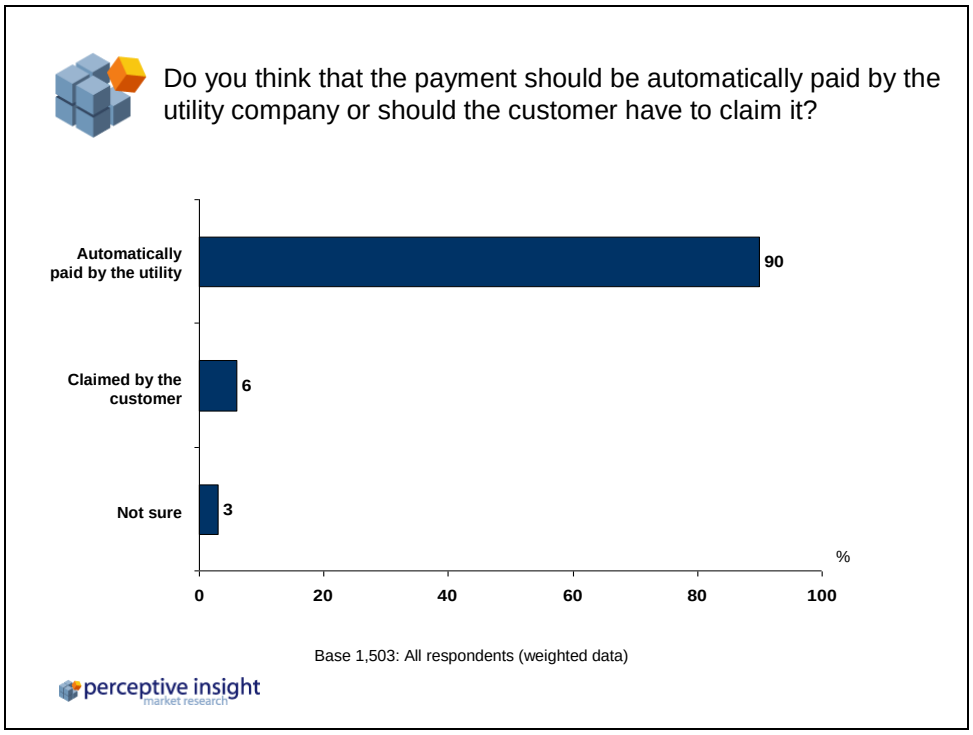
> *"I disagree with goodwill gestures completely. I think they should either be given automatically or removed altogether. People shouldn't have to claim for them."*
> (Belfast, ABC1, Young professionals)

> *"I don't think you should have to seek it. There is a fairness issue – if you don't know about it, then you wouldn't claim. If you are not someone who complains then you don't get the money."*
> (Belfast, ABC1, Older family)

> *"You shouldn't have to jump through hoops to get something that you are entitled to."*
> (Omagh, ABC1, Young family)

Similarly, the overwhelming majority (90%) of respondents in the quantitative survey thought that the payments should be paid automatically by the utility company. Only 6% believed that they should be claimed by the customer (Figure 4.3.11).

Figure 4.3.11: Views on whether payments should be automatic or claimed



Views on exceptional circumstances

Most participants in the qualitative research recognised that there would be some exceptional circumstances that might impact the utility companies' ability to meet the GSS. Whilst there was a degree of leniency afforded to the companies in these circumstances a few participants were of the view that the companies should be able to cope in exceptional circumstances and therefore GSS should continue to apply.

> *"I understand there are circumstances beyond their control, floods, storms etc."*
> (Belfast, C2DE, Older family)

> *"When we have a bad storm, and a lot of homes are affected, they don't seem to be able to cope."*
> (Belfast, C2DE, Older family)

> *"There are some circumstances like weather that is out-with your control but if you're paying for it, it shouldn't be off for 24 hours."*
> (Omagh, ABC1, Young family)

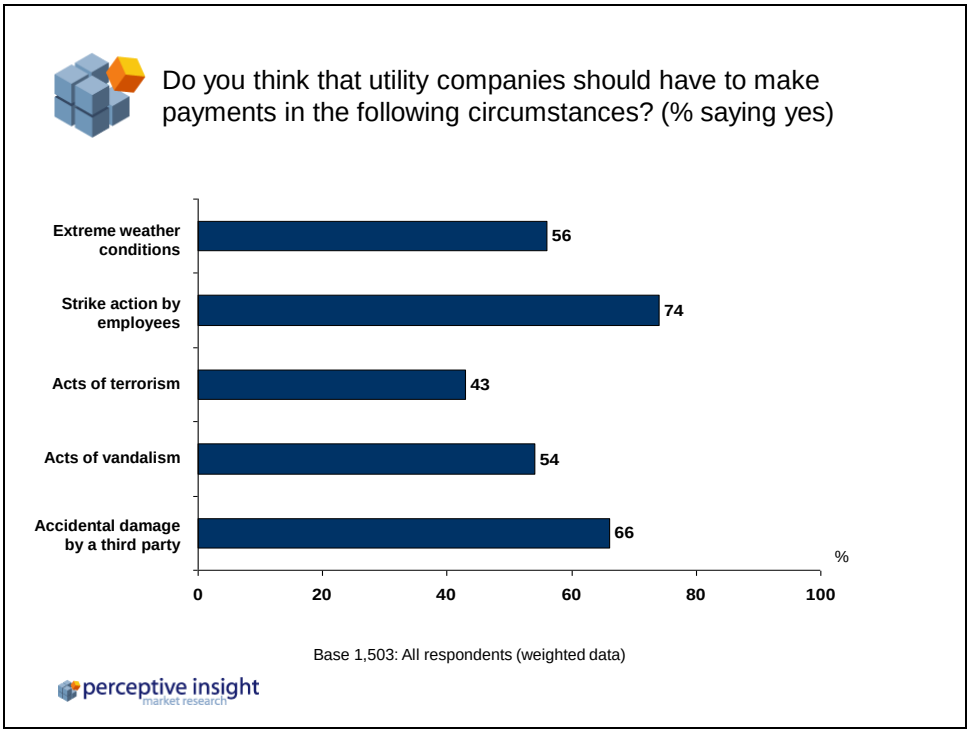
Whilst participants afforded some leniency for bad weather conditions, they were less sympathetic in relation to industrial action.

> *"Yes – it's not our fault they're on strike, it's up to them to resolve their dispute."*
> (Coleraine, under 65 with disability)

The quantitative research showed that the majority thought that utility companies should have to make payments in all exceptional circumstances other than acts of terrorism (with 43% believing payments should still be made). In line with the qualitative findings three-quarters (74%) thought that payments should still be made during strike action by employees. Two-thirds (66%) thought that they should still be made in the case of accidental

damage by a third party and half thought they should still be made in extreme weather conditions (56%) or cases of vandalism (54%) (Figure 4.3.12).

Figure 4.3.12: Views on exceptional circumstances



4.4 Views on generic aspects of GSS

As discussed previously, participants in the qualitative research were in agreement that it is appropriate to apply some generic standards of service across each of the utilities. The particular areas that generic standards could potentially be applied to include:

- Answering the telephone;
- Appointments;
- Complaints;
- Dealing with correspondence and queries;
- Dealing with bill queries and payments;
- Dealing with GSS payments; and
- Priority customers.

Some of these generic aspects are already covered by GSS in the electricity sector in NI (keeping appointments; dealing with bill queries and payments; and dealing with GSS payments), while others are covered by GSS in GB which were used to stimulate discussion in the focus groups (making and keeping appointments; dealing with bill queries and payments; dealing with GSS payments; and dealing with complaints).

Answering the telephone

Some qualitative participants were aware that service providers in other sectors have targets in relation to how quickly their telephones are answered. They thought that a similar standard could be applied to the utility service providers, although they concluded that such a standard should not be linked to a GSS payment. Rather they thought that compliance should be monitored by the Utility Regulator or Government and action taken if required.

"I don't think a goodwill gesture is necessary with the phone."

(Belfast, ABC1, Young professionals)

In relation to dealing with telephone calls some participants were quick to point out that they did not value being placed in a queue particularly if it was costing them money for the telephone call. They also wanted to be directed to the right department and person in the first instance.

"It frustrates me when I call a call centre, and they can't understand me. They redirect your call time and again and I have to keep repeating myself. It would be useful to be routed to the right department and person at the outset."

(Belfast, ABC1, Young professionals)

Appointments- qualitative findings

Participants in the qualitative research felt very strongly about appointments and how they are handled by the utility companies. While a few wanted a definitive time for their appointment, most considered a two hour time slot to be acceptable. Most thought that a morning or afternoon appointment was not precise enough.

"I would expect a definite time for them to be there. That is what the Housing Executive do."

(Belfast, C2DE, Older family)

"Being given the two hour time slot is good. I have things to do - collect my kids and things."

(L'Derry, C2DE, Lone parents and families)

The main issue for many participants was that they have to take leave from work to keep the appointments and they wanted to minimise this as much as possible. They placed great value on their 'work leave' and did not want to be tied to their home for an unspecified appointment time. They preferred an approach which also considered their needs.

"Let them suit you, not you suit them. It is unacceptable to not be told what time maintenance is coming at. A full day's wait is too much. Being told AM or PM is too much."

(Belfast, ABC1, Young professionals)

Some welcomed the idea of being given a call from the workman approximately 20 to 30 minutes prior to their arrival to allow the customer to return home to meet the appointment.

"If they could call half an hour in advance to say they will be arriving, then you could leave work at that time, rather than taking a full day off."

(Belfast, ABC1, Young professionals)

Failing to keep an appointment was viewed as unacceptable. This was because of the inconvenience caused to the customer and the cost in terms of their leave from work to meet both the original and the rescheduled appointment.

"If they failed to keep an appointment, it's not fair at all. I would be taking time off work to wait on them coming."

(Belfast, ABC1, Older family)

> *"I'm at work every day, and even if I wasn't I would still have things to do. Missing an appointment is not acceptable. The two hour time slot is fine."*
>
> (Newcastle, ABC1, Empty nesters)

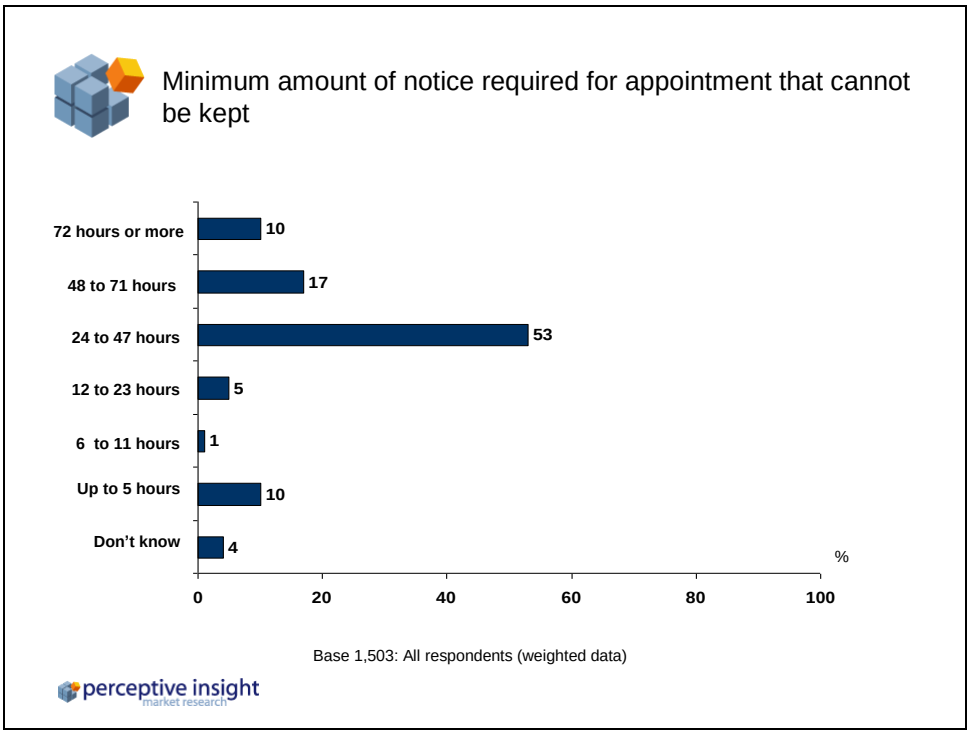
It was felt that 24 hours notice is the minimum which is acceptable if an appointment cannot be met. This is because the customer needs time to rearrange their schedule.

> *"The two hour time slot is acceptable but if they can't keep it you would need more than 24 hours notice as you will have to rearrange your plans."*
>
> (Omagh, ABC1, Young family)

Appointments that cannot be kept - quantitative findings

This view was reflected in the quantitative research, which found that more than half of respondents (53%) felt that the minimum amount of notice required for an appointment that cannot be kept was 24 to 47 hours (Figure 4.4.1). Seventeen percent of respondents felt 48 to 71 hours was an appropriate minimum whilst 10% thought that 72 hours or more was required. Overall, 16% felt a notice period of less than 24 hours was required, with 10% suggesting a period of up to 5 hours, 1% suggesting 6 to 11 hours and 4% suggesting 12 to 23 hours.

Figure 4.4.1: Views on notice required for appointments that cannot be kept



By analysing survey responses we can see that the highest expectation in terms of notice for missed appointments was 14 days, the lowest was less than a day and the mean was 37 hours or approximately one and a half days (Table 4.4.1). The younger age group (16 to 29 year olds) required the least amount of notice (mean of 34 hours or a high of 7 days) whilst the older age group (55 and over) required most (mean of 37 hours or a high of 7 days).

Table 4.4.1: Minimum amount of notice required for appointment that cannot be kept

	Gender		Age			SEG		Total
(Base: All respondents)	Male (688)	Female (815)	16 to 29 (217)	30 to 54 (725)	55 plus (561)	ABC1 (654)	C2DE (849)	(1503) (weighted)
72 hours or more	11%	8%	8%	11%	9%	10%	9%	10%
48 to 71 hours	20%	14%	16%	18%	17%	17%	18%	17%
24 to 47 hours	48%	57%	56%	54%	50%	54%	52%	53%
12 to 23 hours	5%	4%	4%	4%	5%	5%	4%	4%
6 to 11 hours	1%	1%	2%	1%	2%	1%	2%	1%
Up to 5 hours	10%	11%	9%	10%	11%	11%	10%	10%
Don't know	5%	4%	5%	2%	7%	3%	6%	4%
Mean (hours)	39	34	34	36	37	35	37	37

In line with the qualitative discussion about the impact of missed appointments on the employed, an analysis of expectations by working status was also conducted. Whilst the means differed, with those in employment requiring slightly more notice than those not in employment (40 hours compared to 33), the highest expectations of both groups in terms of notice that an appointment could not be kept were identical at 14 days (Table 4.4.2).

Table 4.4.2: Minimum amount of notice required for appointment that cannot be kept

	Status		Total
(Base: All respondents)	Working (640)	Not working (863)	(1503) (weighted)
72 hours or more	13%	7%	10%
48 to 71 hours	18%	16%	17%
24 to 47 hours	53%	53%	53%
12 to 23 hours	4%	5%	4%
6 to 11 hours	1%	2%	1%
Up to 5 hours	9%	11%	10%
Don't know	2%	6%	4%
Mean (hours)	40	33	37

When asked their view of a standard guaranteeing 24 hours notice for appointments that could not be kept, the majority (72%) felt that this was acceptable. And whilst just 6% felt 24 hours was an excessive amount of notice, one in five (21%) felt it was not enough. Within this a higher proportion of those in employment than those not in employment felt that 24 hours notice was not adequate (28% compared to 15%) (Table 4.4.3).

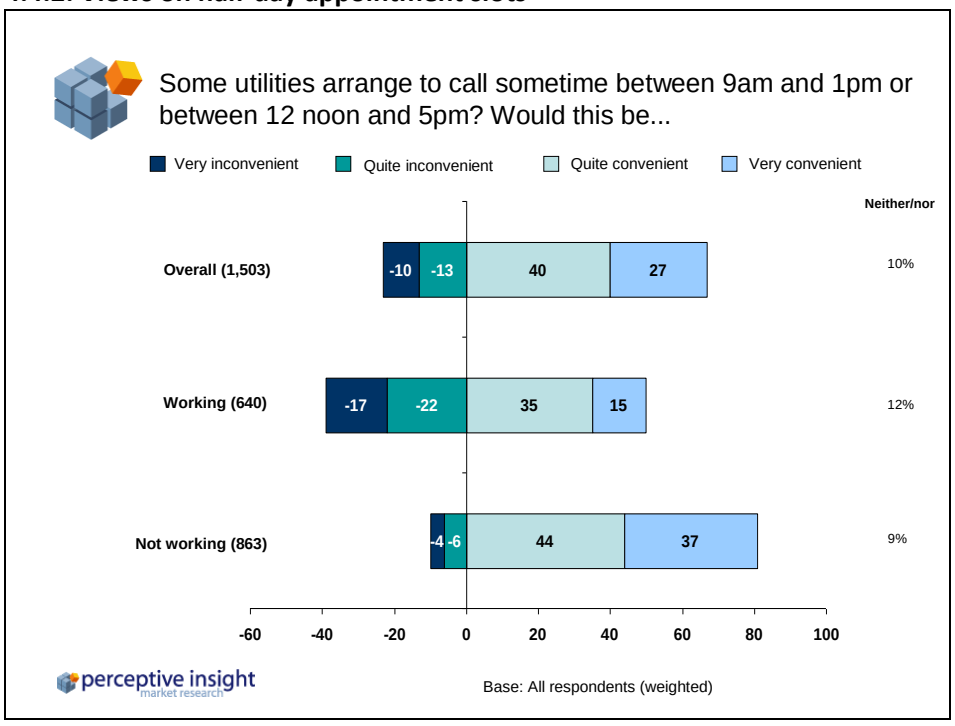
Table 4.4.3: View of 24 hours notice for appointments that cannot be kept

(Base: All respondents)	Status: Working (640)	Status: Not working (863)	Total: (1503) (weighted)
It's far too much	2%	3%	2%
It's a little too much	4%	4%	4%
It's about right	67%	77%	72%
Should be a little more	16%	9%	12%
Should be a lot more	12%	6%	9%
Not sure	1%	1%	1%

Appointment time slots

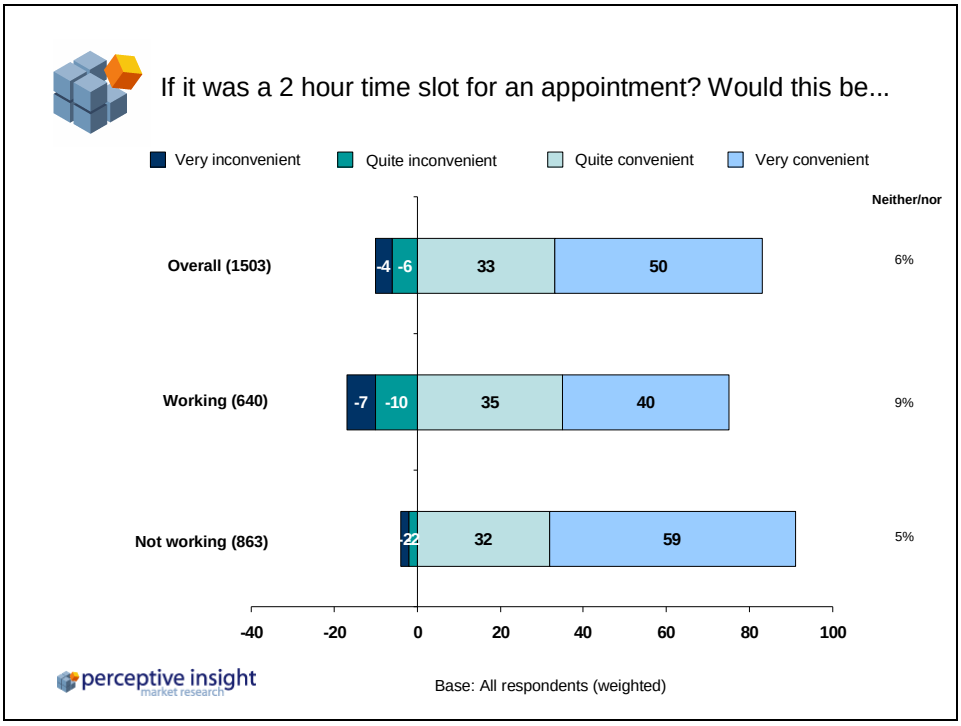
When asked about the convenience of half-day appointment slots two out of three survey respondents (67%) felt this would be convenient. Again there were significant differences in the proportion of those in employment who felt this was convenient (50%) and those not in employment who felt the same (81%) (Figure 4.4.2).

Figure 4.4.2: Views on half-day appointment slots



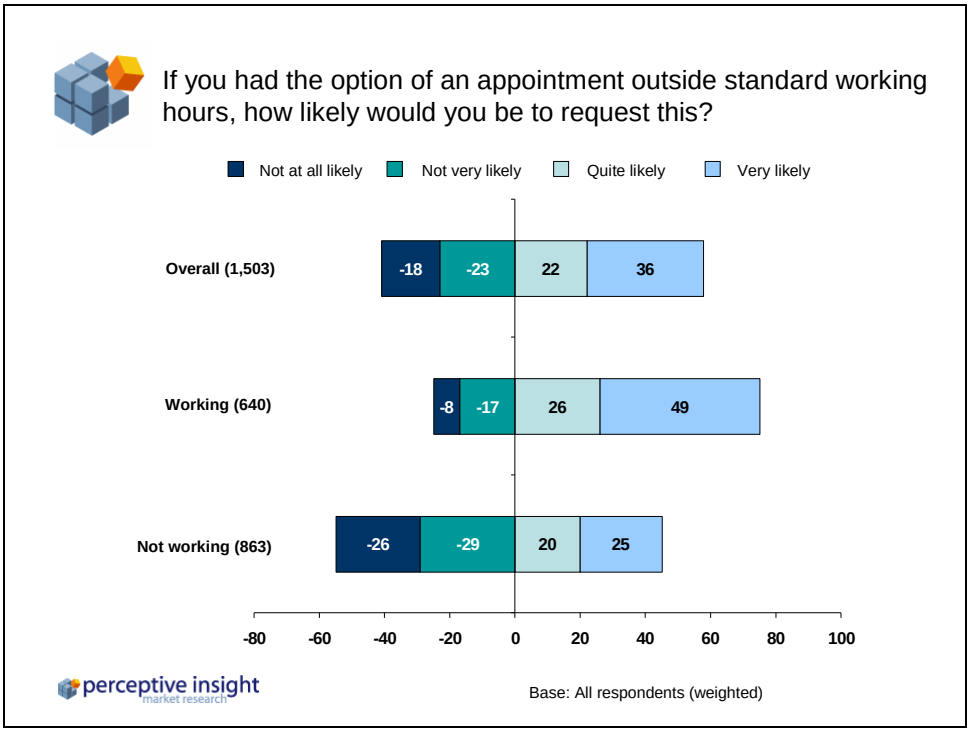
When asked about how convenient a two hour time slot for appointments would be the majority (83%) felt this would be convenient. Again there was a considerable difference in the proportion of those in employment who felt this was convenient (75%) and those not in employment who felt the same (91%) (Figure 4.4.3).

Figure 4.4.3: Views on two-hour appointment slots



Fifty eight percent reported that they would be likely to make an appointment outside of working hours if they had the option to do so. Again the proportion of those in employment who felt they would be likely to do so (75%) differed significantly from the proportion of those not in employment who felt the same (45%) reflecting the greater importance of flexibility in dealing with utility companies to customers who work (Figure 4.4.4).

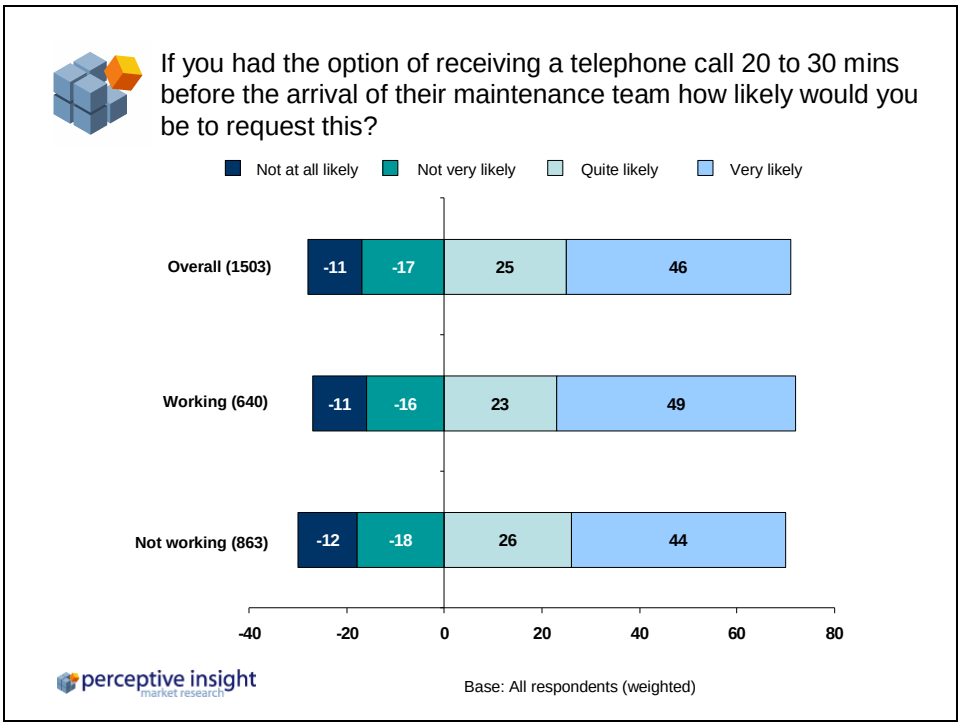
Figure 4.4.4: Views on appointments outside working hours



Telephone contact prior to appointments- quantitative findings

The majority of survey respondents were in favour of receiving a telephone call in advance of a visit from a utility company with seven out of ten respondents (71%) suggesting that they would be likely to request this option if offered. There was little difference between those working and those not in employment in terms of the level of likelihood to request this service (Figure 4.4.5).

Figure 4.4.5: Views on telephone calls in advance of appointed visits



Payment levels for missed appointments

The qualitative phase demonstrated that some felt that the level of payment for failing to keep an appointment (£20 for water and gas, £25 for electricity) was not a fair reflection of the inconvenience caused to the customer. They considered that this should be set quite high compared to other service areas.

> *"It should be more for failing to keep an appointment. If you take a day off your work, and the frustration of sitting waiting for someone to come, you expect to be more fully compensated."*
>
> (L'Derry, C2DE, Older people 65+)

However, this view was not shared by survey respondents, three-quarters (75%) of whom felt that the £20 payment level for a missed appointment was sufficient. This finding was consistent across both socio-economic groups and both respondents who were employed and those who were not working (Table 4.4.4).

Table 4.4.4: Views on typical payment of £20 for a missed appointment

	SEG		Status		Total
(Base: All respondents)	ABC1 (654)	C2DE (849)	Working (640)	Not working (863)	(1503) (weighted)
It's far too much	3%	2%	2%	3%	2%
It's a little too much	4%	2%	3%	3%	3%
It's about right	73%	77%	71%	78%	75%
Should be a little more	10%	11%	12%	9%	10%
Should be a lot more	9%	7%	11%	6%	8%
Don't know	1%	1%	1%	1%	1%

Complaints

The qualitative phase found that when asked about priorities for responding to complaints, participants were more concerned that the complaint was being investigated rather than just receiving acknowledgement that the complaint had been made.

The view was expressed that the current GSS electricity standard of ten working days to respond to a complaint was sufficient to deal substantially with most complaints although it was acknowledged that a small number might require more in-depth investigation.

> *"Ten working days is fine to respond to a complaint with a resolution but not enough just to acknowledge your complaint."*
>
> (Coleraine, under 65 with disability)

> *"I wouldn't mind ten days as long as it's a substantive response within that time frame rather than an acknowledgement. It can be irritating knowing your money is being wasted on acknowledgement letters rather than getting it sorted out."*
>
> (Newcastle, ABC1, Empty nesters)

If a complaint was going to take longer than ten days to resolve, some suggested that detailed information should be provided to include which department was dealing with the issue, a contact number and an estimate of how long it will take to resolve the issue.

> *"They should give you an idea of how long it will take to resolve your issue so that people know it is being dealt with and which department of the company is dealing with it. A contact number and a reference number should also be available."*
>
> (Belfast, ABC1, Young professionals)

The survey findings reflected these views, with less than half (43%) of respondents feeling the timescale was appropriate. The majority felt ten working days was an excessive timescale (55%), with 29% saying that it was far too long and 26% thinking it was a little too long. Although these findings were relatively consistent across those within employment and those not working, the proportion of ABC1 respondents who felt that the timescale was sufficient (50%) was much higher than the proportion of C2DE respondents who felt the same (38%) (Table 4.4.5).

Table 4.4.5: Views on full response to complaints within 10 working days

(Base: All respondents)	SEG		Status		Total
	ABC1 (654)	C2DE (849)	Working (640)	Not working (863)	(1503) (weighted)
It's far too much	25%	32%	27%	30%	29%
It's a little too much	23%	28%	26%	26%	26%
It's about right	50%	38%	46%	42%	43%
Should be a little more	1%	2%	1%	2%	1%
Should be a lot more	0%	0%	0%	0%	0%
Don't know	0%	1%	0%	1%	1%

Dealing with meter queries

Survey respondents also wished to see meter queries resolved within a shorter period of time with over half (56%) suggesting that ten working days was too long for a minimum standard of service. This finding was consistent across all socio-economic and employment groups (Table 4.4.6).

Table 4.4.6: Views on dealing with meter queries within 10 working days

(Base: All respondents)	SEG		Status		Total
	ABC1 (654)	C2DE (849)	Working (640)	Not working (863)	(1503) (weighted)
It's far too much	29%	33%	32%	30%	31%
It's a little too much	24%	25%	25%	24%	25%
It's about right	44%	40%	40%	43%	42%
Should be a little more	2%	1%	2%	1%	1%
Should be a lot more	0%	0%	0%	0%	0%
Don't know	1%	1%	1%	2%	1%

Dealing with bill queries and payments

Participants in the qualitative research were of the view that any billing queries and payments should be dealt with promptly. The view was expressed that five days to respond to a query was too long and, if possible, the query should be sorted out over the telephone at the time the query is made.

> *"Ten working days is excessive. We don't get ten days grace if they have a query regarding your direct debit or something."*
>
> (Omagh, ABC1, Young family)

> *"Five days is a long time to get back to you for just a query. Why can't they sort it out there and then on the phone? All your details are there on the computer."*
>
> (Omagh, ABC1, Young family)

Participants were asked how much time the utilities should have to repay any due sums from the point at which they were made aware of the issue. Whilst a small number thought a month was acceptable, most considered that any repayment should be made within 10 working days, taking into account the internal processes of the utility company. Others

thought that five days was more appropriate, pointing out that current standards suggest that utility companies can make changes to the payment method within five days.

> *"Funny they can change your payment method in 5 days, but they can't give you a query about your own account in 10 days!"*
>
> (Coleraine, under 65 with disability)

While some suggested that the payment could be credited to their bill most wanted the actual refund.

> *"I'd want a refund, not a credit to your account."*
>
> (Belfast, ABC1, Young professionals)

The quantitative findings differed from those of the qualitative phase in terms of the acceptability of a five-day period to resolve bill queries. Whilst qualitative participants had felt that five working days was unacceptable, the majority (64%) of survey respondents believed that it was acceptable and less than one-third (32%) considered it to be longer than necessary (Table 4.4.7). Perhaps surprisingly, these findings were relatively consistent across both socio-economic groups and across both pre-pay and bill pay customers.

Table 4.4.7: Views on 5 working days to resolve a bill query

	SEG		Status		Total
(Base: All respondents)	ABC1 (654)	C2DE (849)	Working (640)	Not working (863)	(1503) (weighted)
It's far too much	17%	19%	21%	16%	18%
It's a little too much	13%	15%	14%	14%	14%
It's about right	66%	62%	61%	67%	64%
Should be a little more	3%	2%	3%	2%	2%
Should be a lot more	0%	0%	0%	0%	0%
Don't Know	1%	1%	1%	1%	1%

When asked about a minimum standard which would guarantee any due refunds to be made within ten working days, the majority (61%) felt this was acceptable but a significant minority (38%) felt the timescale was excessive (Table 4.4.8). These findings largely reflect the focus group discussions.

Table 4.4.8: Views on 10 working days to make due refunds

	SEG		Status		Total
(Base: All respondents)	ABC1 (654)	C2DE (849)	Working (640)	Not working (863)	(1503) (weighted)
It's far too much	18%	21%	23%	15%	20%
It's a little too much	18%	17%	17%	18%	18%
It's about right	64%	60%	58%	65%	61%
Should be a little more	0%	1%	1%	1%	1%
Should be a lot more	0%	0%	0%	0%	0%
Don't Know	0%	1%	1%	1%	1%

Once again, reflecting the qualitative findings, survey respondents felt that a standard allowing five working days to make any requested changes to payment levels was acceptable with the majority (82%) believing this timescale to be appropriate and a small but notable minority (14%)believing it to be much too long (Table 4.4.9).

Table 4.4.9: Views on 5 working days to change a payment method

	SEG		Status		Total
(Base: All respondents)	ABC1 (654)	C2DE (849)	Working (640)	Not working (863)	(1503) (weighted)
It's far too much	6%	6%	8%	4%	6%
It's a little too much	9%	8%	9%	7%	8%
It's about right	82%	82%	80%	84%	82%
Should be a little more	2%	2%	2%	2%	2%
Should be a lot more	0%	1%	0%	1%	0%
Don't Know	1%	1%	1%	1%	1%

GSS payment levels for bill query and payment standards

Survey respondents were asked what they thought of the typical GSS payment level for failing to meet the agreed standard for resolving bill or payment queries. Three-quarters (76%) of respondents felt that this payment level was acceptable whilst the next largest proportion (15%) felt it should be more. Just 8% felt £20 was excessive for failing to meet such a standard (Table 4.4.10).

Table 4.4.10: Views on typical payment of £20 for failing to meet bill/payment query GSS

	SEG		Status		Total
(Base: All respondents)	ABC1 (654)	C2DE (849)	Working (640)	Not working (863)	(1503) (weighted)
It's far too much	3%	2%	2%	3%	3%
It's a little too much	7%	4%	5%	6%	5%
It's about right	76%	77%	76%	76%	76%
Should be a little more	9%	12%	12%	9%	11%
Should be a lot more	5%	3%	4%	3%	4%
Don't Know	1%	2%	1%	1%	1%

Dealing with GSS payments

Within the qualitative research participants were asked about the potential GSS of ten working days to make any GSS payments due to customers. Overall, participants were in favour of any GSS payment being made within this timescale. A small number thought that ten days for this type of payment was too long.

"10 days to make payment is all right."

(Belfast, C2DE, Older family)

"It's fair for them to have 10 days to make a payment."

(L'Derry, C2DE, Lone parents and families)

Priority customers

Throughout the discussion, when talking about interruptions to supply, participants often referred to the needs of older people and those with young children. Therefore, when asked if there were any customers who need to be given priority during a supply interruption, these groups were automatically considered. Overall though, awareness of current groups of priority customers was low, even amongst those who would be considered part of those priority groups.

> *"Older people, people with new born children and the disabled are vulnerable. They need to be given priority."*
>
> (Belfast, C2DE, Older family)

> *"Elderly people can only be left a couple of hours; people that can't heat up moving about the house. It should really be done within an hour or two hours."*
>
> (Coleraine, under 65 with disability)

There was little recognition of the task involved in providing alternative heating and cooking facilities to older people and those with young children and indeed how large these groups might be in an affected area. On probing it was acknowledged that there were a number of additional higher priority groups. Those with life-threatening health issues were seen as being in need of exceptional assistance in the case of a supply interruption. Participants were concerned as to how the utilities might be made aware of people who have exceptional needs particularly as they themselves were unaware that such a service already exists. Indeed within the survey we found 5% of households saying they have someone who is dependent on electrical equipment for healthcare yet only 1% of respondents overall reported being registered on the critical care register held by NIE.

4.5 Views on GSS in relation to electricity

In the paragraphs that follow we discuss the views and issues that participants raised in relation to GSS on standards that are specific to their electricity supply. As GSS are currently in place for the NI electricity sector participants were asked about these standards.

By way of background it is worth noting that the quantitative survey shows that 45% of customers have a pre-payment meter, 31% pay by direct debit and 22% make their payment upon receipt of their quarterly bill (Table 4.5.1 and 4.5.2). Those within the C2DE group are much more likely to have a pre-payment meter (63%) than those classed as ABC1 (24%). Younger householders (aged 16 to 29) are also much more likely to have a pre-payment meter for their electricity (69% compared with 48% of 30 to 54 year olds and 31% of those aged 55 or over). A similar pattern was evidenced for respondents with children (58% each of those with children under 5 or under 16 having a pre-payment meter) in comparison to those with no children (37%).

Table 4.5.1: Methods of payment for electricity

	Gender		Age			SEG		Total
(Base: All respondents)	Male (688)	Female (815)	16 to 29 (217)	30 to 54 (725)	55 plus (561)	ABC1 (654)	C2DE (849)	(1503) (weighted)
Pre-payment meter	40%	49%	69%	48%	31%	24%	63%	45%
Direct debit	33%	30%	15%	31%	38%	47%	17%	31%
Quarterly bill	25%	19%	13%	19%	29%	25%	19%	22%
Don't know	3%	2%	2%	3%	3%	3%	2%	3%
Total	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*

Table 4.5.2: Methods of payment for electricity

	Children			Disability		Total
(Base: All respondents)	No Children (934)	Child(ren) under 16 (569)	Child(ren) Under 5 (282)	Household disability (408)	No household disability (1095)	(1503) (weighted)
Pre-payment meter	37%	58%	58%	51%	42%	45%
Direct debit	35%	24%	21%	23%	34%	31%
Quarterly bill	25%	16%	19%	24%	21%	22%
Don't know	3%	2%	3%	2%	3%	3%
Total	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*

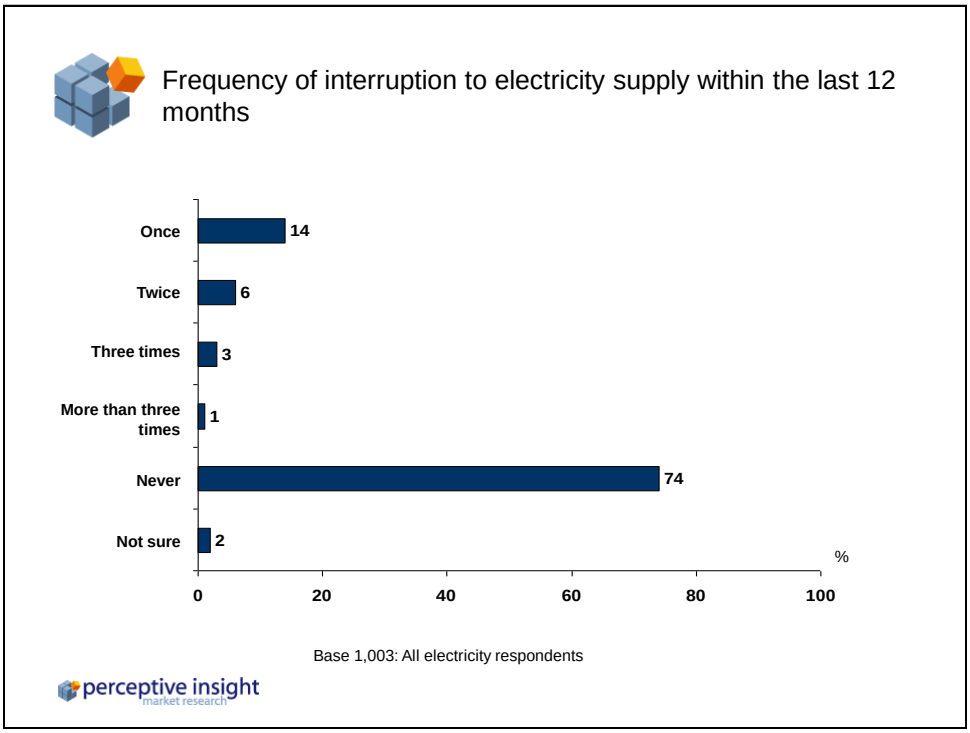
Experience of supply interruptions

For most focus group participants, the interruption of their power supply was a rare occurrence. However a number of participants across all areas were able to recall a specific instance in the previous year or two that had impacted on them. These all appeared to be one-off occurrences. It was recognised that most people had a reliable electricity supply and that outages were exceptional.

The quantitative survey shows that one-quarter (24%) of respondents had experienced an interruption to electricity supply within the last 12 months (Figure 4.5.1). Of those that had, 14% had experienced one interruption, 6% had experienced two, 3% had experienced three and 1% had experienced more than three interruptions.

Those living in rural areas were more likely to have experienced a power outage in the previous 12 months (31%) compared with those living in an urban area (22%). Those living in rural areas were also more likely to have experienced outages more frequently, with 14% of those in rural areas having experienced more than one outage in the previous 12 months compared with 9% of those in urban areas.

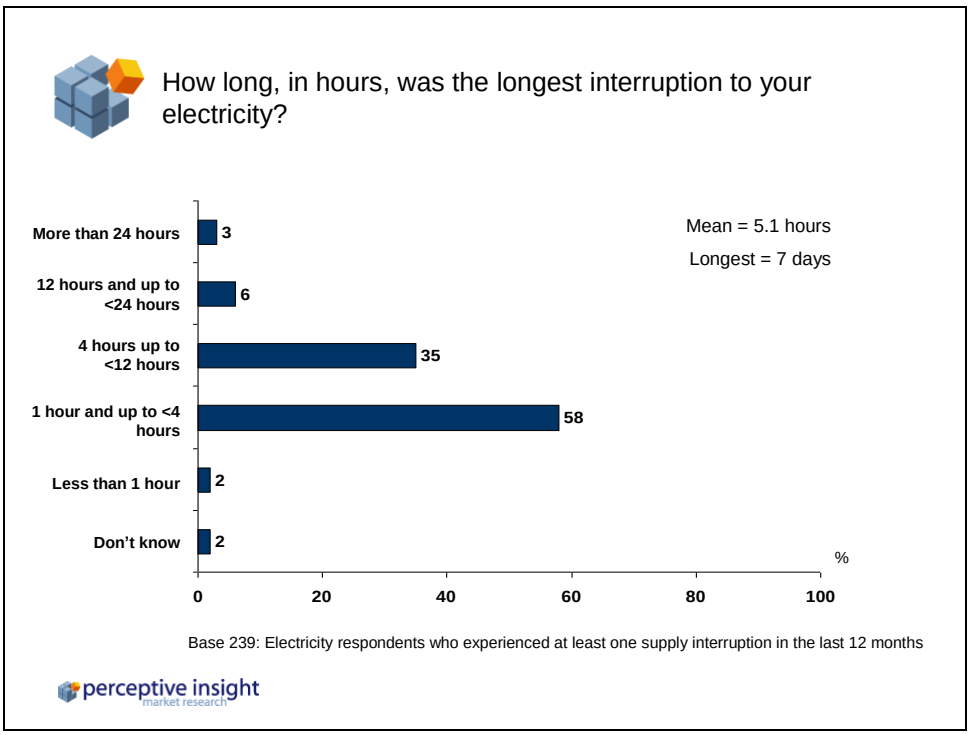
Figure 4.5.1: Frequency of electrical supply interruptions



Respondents were asked the length in hours of their longest electricity interruption in the previous 12 months (Figure 4.5.2). The majority (60%) said that power had been restored within four hours. Just over one third (35%) reported the longest outage lasted from four up to 12 hours and 6% said their supply interruption was from 12 up to 24 hours. Three percent had experienced an outage of 24 hours or longer.

The longest supply interruption reported was seven days and the average length of an outage was just over 5 hours.

Figure 4.5.2: Duration of longest supply interruption



Supply restoration

All participants in the qualitative phase expressed the view that having a reliable electricity supply was the most important thing for them and therefore the GSS payment was something they did not want to be in the position to claim. However they recognised that there may be infrequent occasions when they might have to. Therefore there were some very strong views about the level of payment and how it should be implemented.

> *"I would expect 100% working order."*
>
> (Belfast, C2DE, Older family)

A key issue that was raised during the group discussions was the value that customers place on being kept informed during a power outage. Participants wanted to be able to plan around the power cut and suggested that having an estimated time of reconnection would help them do this.

Participants recognised that when large areas are affected it can prove difficult to get through to NIE by telephone. However, it was seen as acceptable for NIE to make use of recorded telephone messages in such cases. Customers felt the message should let customers know that NIE is aware of the issue, is working to rectify it and provide information on the estimated time for the restoration of supply.

> *"I think that people need to know exactly what is going on. When our power went out, they were making excuses after excuses. I don't think they really knew what was going on."*
>
> (L'Derry, C2DE, Older people 65+)

> *"My electric went off before I came out, and I phoned them. They knew there was a problem, all I had to give them was my address, and they told me that there was a problem and it would be fixed within three hours. This was acceptable. You know they are aware of it, and are dealing with it."*
>
> (Belfast, ABC1, Young professionals)

Survey participants were asked, unprompted, if there was an electricity power cut, what is the maximum amount of time they would expect it to take to restore power in normal conditions (Tables 4.5.3 and 4.5.4). Echoing the findings from the focus groups, respondents had high expectations of the maximum time it should take to restore supply. Over one third (36%) though it should take no longer than two hours, 23% gave a maximum time of between two and four hours and 13% said between 4 and 8 hours. Just one in ten (10%) allowed between 8 and 12 hours and a further one in ten (11%) up to 24 hours. The average time given was eight hours.

It is interesting to note the difference in expectations by gender and age, with females and younger respondents having greater expectations of the maximum time it should take to have power restored.

Table 4.5.3: Maximum time power restoration expected to take in normal conditions (unprompted)

	Gender		Age			SEG		Total
(Base: Electricity respondents)	Male (459)	Female (544)	16 to 29 (130)	30 to 54 (501)	55 plus (372)	ABC1 (466)	C2DE (537)	(1003)
Up to 2 hours	29%	42%	43%	39%	31%	34%	38%	36%
>2 and up to 4 hours	25%	21%	17%	22%	26%	25%	21%	23%
>4 and up to 8 hours	14%	13%	13%	14%	12%	16%	11%	13%
>8 and up to 12 hours	13%	7%	8%	10%	10%	9%	10%	10%
>12 and up to 18 hours	0%	0%	0%	0%	0%	0%	0%	0%
>18 and up to 24 hours	13%	9%	12%	9%	13%	10%	12%	11%
>24 and up to 48 hours	1%	0%	0%	1%	1%	1%	1%	1%
More than 48 hours	0%	1%	1%	0%	1%	0%	1%	1%
Don't know	5%	6%	6%	4%	8%	5%	6%	6%
Mean (hours)	8	7	7	7	9	7	8	8

Table 4.5.4: Maximum time power restoration expected to take in normal conditions (unprompted)

	Children			Disability		Total
(Base: Electricity respondents)	No Children (612)	Child(ren) under 16 (391)	Child(ren) Under 5 (183)	Household disability (262)	No household disability (741)	(1003)
Up to 2 hours	33%	43%	39%	39%	36%	36%
>2 and up to 4 hours	25%	19%	21%	20%	23%	23%
>4 and up to 8 hours	13%	14%	14%	11%	14%	13%
>8 and up to 12 hours	11%	8%	9%	10%	10%	10%
>12 and up to 18 hours	0%	0%	0%	0%	0%	0%
>18 and up to 24 hours	12%	9%	10%	12%	10%	11%
>24 and up to 48 hours	1%	1%	2%	0%	1%	1%
More than 48 hours	1%	0%	0%	1%	1%	1%
Don't know	5%	6%	5%	7%	5%	6%
Mean (hours)	8	6	7	8	7	8

Respondents were asked their views if the GSS was to restore power within a maximum of 24 hours (Table 4.5.5 and Table 4.5.6). The majority (73%) felt that 24 hours to restore power was too much with 57% saying it was 'far too much'. One quarter (25%) thought the time allowed was about right with just 1% thinking it was too little.

It can be seen that women (63%) were more likely than men (49%) to view the 24 hour standard as far too much, as did those who had someone in their household with a disability (62%).

Table 4.5.5: If the guaranteed standard for electricity was to restore power within a maximum of 24 hours, is this…

	Gender		Age			SEG		Total
(Base: All electricity respondents)	Male (459)	Female (544)	16 to 29 (130)	30 to 54 (501)	55 plus (372)	ABC1 (466)	C2DE (537)	(1003)
It's far too much	49%	63%	58%	57%	55%	58%	56%	57%
It's a little too much	18%	14%	11%	17%	17%	17%	15%	16%
It's about right	30%	21%	28%	24%	27%	24%	27%	25%
Should be a little more	1%	1%	2%	1%	1%	1%	1%	1%
Should be a lot more	0%	0%	1%	0%	0%	0%	0%	0%
Don't know	1%	0%	0%	1%	1%	0%	1%	1%

Table 4.5.6: If the guaranteed standard for electricity was to restore power within a maximum of 24 hours, is this…

(Base: All electricity respondents)	No Children (612)	Child(ren) under 16 (391)	Child(ren) Under 5 (183)	Household disability (262)	No household disability (741)	(1003)
It's far too much	56%	58%	58%	62%	55%	57%
It's a little too much	16%	17%	15%	11%	18%	16%
It's about right	27%	23%	26%	25%	26%	25%
Should be a little more	1%	1%	1%	1%	1%	1%
Should be a lot more	0%	0%	0%	0%	0%	0%
Don't know	0%	1%	1%	1%	0%	1%

Again, the majority (58%) regarded a shorter maximum of 12 hours to restore power as too much with just less than one third (31%) saying it was far too much (Table 4.5.7 and 4.5.8). However, 38% considered this maximum length of time to be about right. Three percent thought it should be a little more.

Again, females (36%) were more likely than males (24%) to regard a maximum time of 12 hours as far too much, as were those who had someone in their household with a disability (35%).

Table 4.5.7: If the guaranteed standard for electricity was to restore power within a maximum of 12 hours, is this…

	Gender		Age			SEG		Total
(Base: All electricity respondents)	Male (459)	Female (544)	16 to 29 (130)	30 to 54 (501)	55 plus (372)	ABC1 (466)	C2DE (537)	(1003)
It's far too much	24%	36%	35%	31%	29%	31%	30%	31%
It's a little too much	26%	29%	24%	28%	28%	26%	28%	27%
It's about right	48%	30%	40%	38%	39%	39%	38%	38%
Should be a little more	2%	3%	1%	2%	3%	3%	2%	3%
Should be a lot more	0%	1%	1%	1%	0%	1%	0%	0%
Don't know	0%	1%	0%	1%	1%	0%	1%	1%

Table 4.5.8: If the guaranteed standard for electricity was to restore power within a maximum of 12 hours, is this…

(Base: All electricity respondents)	No Children (612)	Child(ren) under 16 (391)	Child(ren) Under 5 (183)	Household disability (262)	No household disability (741)	(1003)
It's far too much	35%	31%	29%	35%	29%	31%
It's a little too much	24%	28%	28%	26%	28%	27%
It's about right	40%	38%	39%	34%	40%	38%
Should be a little more	1%	2%	3%	3%	2%	3%
Should be a lot more	1%	1%	0%	1%	0%	0%
Don't know	0%	1%	1%	2%	0%	1%

The current GSS states that in normal conditions supply should be restored within 24 hours following a fault. Failure to meet this target entitles the domestic bill payer to a GSS payment of £50 plus £25 for each additional 12 hours without power.

As stated previously supply reliability is extremely important to customers. In the qualitative research participants therefore thought that any payment should reflect this by being linked to the duration of the interruption so as to encourage the supplier to re-establish electricity supply as quickly as possible.

Participants welcomed the staged payment level for each period of time that the customer was without electricity. This was viewed as giving the utility an incentive to reconnect quickly.

The consensus was that any GSS payment should be triggered after 12 hours without power although some debated that it should be less (e.g. four hours). It was felt that after about four hours the inconvenience of not having electricity starts to impact greatly on most people.

When discussing the level of payment appropriate to extended supply interruptions, participants reflected the cost of having to buy 'take away' food for their family and the extra cost of coal for their fire. They implied that the level of payment should take this additional expenditure into account.

> *"Yes, but you should be getting more. By the time you buy take away food for the family for 24 hours, extra coal etc., you will have spent that £50 3 times over."*
>
> (Coleraine, under 65 with disability)

The survey respondents were asked their views of the payment structure for a supply interruption lasting longer than 24 hours (Table 4.5.9 and 4.5.10). Three-quarters (74%) considered the payment level to be about right, 5% thought it was too much and 19% believed it should be more. Those most likely to think it should be more were those aged 30 to 54 (22%).

There was little difference in opinion by households with and without children and households with and without someone with a disability.

Table 4.5.9: The payment for an electricity supply interruption lasting longer than 24 hours is £50. Each additional 12 hours without supply a further £25 is due. Is this…

	Gender		Age			SEG		Total
(Base: All electricity respondents)	Male (459)	Female (544)	16 to 29 (130)	30 to 54 (501)	55 plus (372)	ABC1 (466)	C2DE (537)	(1003)
It's far too much	2%	1%	2%	0%	2%	1%	1%	1%
It's a little too much	6%	2%	8%	5%	2%	5%	4%	4%
It's about right	73%	76%	78%	71%	77%	74%	75%	74%
Should be a little more	10%	12%	7%	13%	10%	12%	11%	11%
Should be a lot more	7%	8%	4%	9%	7%	7%	8%	8%
Don't know	1%	1%	1%	1%	1%	1%	1%	1%

Table 4.5.10: The payment for an electricity supply interruption lasting longer than 24 hours is £50. Each additional 12 hours without supply a further £25 is due. Is this…

(Base: All electricity respondents)	No Children (612)	Child(ren) under 16 (391)	Child(ren) Under 5 (183)	Household disability (262)	No household disability (741)	(1003)
It's far too much	2%	0%	0%	2%	1%	1%
It's a little too much	3%	6%	7%	5%	4%	4%
It's about right	74%	75%	77%	71%	76%	74%
Should be a little more	11%	12%	10%	13%	11%	11%
Should be a lot more	8%	7%	6%	8%	8%	8%
Don't know	1%	1%	1%	1%	1%	1%

Planned interruptions

Respondents were asked their views on the minimum amount of notice required for a planned electricity power cut. Responses varied with 14% thinking it should be less than one day, 28% about one day, 20% about 2 days and 24% believing it should be longer than 2 days. Indeed 16% thought it should be seven days or more. The average time given was about 2.5 days (Table 4.5.11).

Table 4.5.11: Minimum amount of notice required for planned electricity power cut lasting more than 4 hours

	Gender		Age			SEG		Total
(Base: All electricity respondents)	Male (459)	Female (544)	16 to 29 (130)	30 to 54 (501)	55 plus (372)	ABC1 (466)	C2DE (537)	(1003)
Less than 4 hours	8%	11%	6%	7%	13%	9%	9%	9%
4 to 11 hours	3%	3%	2%	2%	5%	3%	3%	3%
12 to 23 hours	2%	2%	3%	2%	2%	2%	2%	2%
24 to 47 hours	38%	39%	35%	39%	39%	38%	38%	38%
2 days	20%	19%	24%	20%	18%	19%	21%	20%
3 days to 4 days	7%	4%	7%	6%	5%	6%	5%	5%
5 days to 6 days	3%	3%	3%	4%	2%	3%	3%	3%
Seven days or more	16%	17%	18%	19%	12%	18%	14%	16%
Don't know	2%	2%	2%	1%	4%	1%	4%	2%
Mean (hours)	59	59	65	63	51	63	55	59
Max (days)	31	31	14	14	31	31	14	31

Main fuse replacement

In the qualitative phase participants were asked their views on the GSS for replacing their main fuse. The current GSS standard guarantees main fuse replacement within three hours during a working day and four hours on any other day.

Most were unaware of what the main fuse was, implying that few had been affected (or were unaware of being affected) by this issue. However, they associated having the main fuse replaced with an interruption of the power supply. Therefore they felt that the penalty for failing to meet the guaranteed standard of service should reflect this.

> *"It depends how long outside the time they are for the goodwill payment. It should be a sliding scale, maybe £25 per day."*
>
> (Newcastle, ABC1, Empty nesters)

> *"£25 goodwill payment is not acceptable, maybe £25 per hour."*
>
> (Belfast, C2DE, Older family)

On first reading that the electricity company would replace the main fuse within three hours during a working day and four hours on any other day this was viewed as acceptable. However, when informed of the limitation that the incident should be reported during specified hours (8am to 8pm weekdays and 9am to 5pm at the weekend) participants realised that customers could potentially be without power from, for example, 5.01pm on a Saturday until 1pm on a Sunday. This was viewed as unacceptable with participants reverting to their original interpretation of the standard as being acceptable.

Meter accuracy issues

The current GSS for queries on meter accuracy is five working days to provide an explanation, or if a visit is required then seven working days to make an appointment.

Many participants commented that the wording of this standard was misleading, interpreting it as seven days to arrange and make a visit, rather than just to set the appointment. It was thought that the former interpretation was a more acceptable standard.

> *"Seven working days is a bit long and a bit misleading. It implies a week which is not the case…I would think five working days would be more appropriate, and easier to understand … Change wording to resolve, rather than 'make an appointment'. I would rather have that clearer."*
>
> (Belfast, ABC1, Young professionals)

Others queried the length of time afforded in the current standard with many thinking that it was too lenient.

> *"I would expect a reply from a query on my meter reading within 24 hours."*
>
> (Belfast, C2DE, Older family)

> *"If there is a problem and it's their problem, they should have an appointment made within 24 hours."*
>
> (Coleraine, under 65 with disability)

> *"They should have it resolved within the 48 hours, unless there is work needing done. If it's just them coming out to look at your meter, then that should be done quicker."*
>
> (Coleraine, under 65 with disability)

Some participants recounted experiences whereby current standards were not being adhered to.

> *"My son has moved into a house and the meter is fixed. He has reported it six times and nobody has come out to look at it."*
>
> (L'Derry, C2DE, Older people 65+)

Others queried whether electricity meters were checked for accuracy and thought that this should be a more regular occurrence. One younger participant recounted that he had reported a meter accuracy issue to NIE. Although he was convinced that the meter was wrong given the high electricity costs he was paying, NIE told him it was accurate. He was eventually rehoused and reported that his electricity is now more affordable.

> *"I think it should be compulsory that the meter is checked regularly legally. A week is ok for that."*
>
> (L'Derry, C2DE, Older people 65+)

> *"Are the meters serviced? Nobody has ever looked at mine, and I've been in my house since 1997."*
>
> (Coleraine, under 65 with disability)

Estimate for an electricity supply

Participants were asked how long it is acceptable to wait for an estimate or quotation for an electricity supply. The current GSS standard is seven working days for a small quotation and 15 working days for a larger quotation.

Most participants considered this to be a routine task for most households and therefore expected a quick turnaround on the quotation. Therefore the current standard was considered to be very lenient. Even when asked to consider that visits may be required to the property etc., participants still struggled to understand the timeframe for the current standard.

> *"I would expect quotations within 24 hours."*
>
> (Belfast, ABC1, Older family)

> *"My sister was going to get her meter moved as she wanted a downstairs toilet in. Seven days is far too long for someone to punch information into a computer. This is a standard procedure."*
>
> (Belfast, C2DE, Older family)

As this standard did not relate to an interruption of supply the £50 payment was viewed as acceptable.

Reconnections and new supply

When discussing reconnections and new supplies a number of circumstances were considered including reconnection after power had been disconnected, moving into a new home and when establishing a supply to a new building. It should be noted that participants had little experience of connecting a new supply. The current GSS for a new supply is two working days for a domestic property. The GSS payment if this target is not kept is £25, with £50 payable if an appointment is not met.

The main concern for customers in relation to a new supply was whether the customer was with electricity or not. Again, given the value placed on having an uninterrupted service, participants thought that the supply should be reinstated as quickly as possible when there was a direct impact on the customer.

In relation to those instances when current supply was not an issue, participants were prepared to consider a longer lead time. For example, they understood that customers usually had to plan to move into a new home and therefore could contact NIE in advance to ensure that the electricity was connected.

A number of participants commented that when moving to a new home the electricity is often already connected and a change of billing details or the sourcing of a pre-payment card is all that is required. Therefore re-connection of supply was less likely to be an issue in such cases. However, it was also noted that the current standard was not always adhered to.

> *"If I didn't pay my bill and my supply was cut off, I would expect it reinstated immediately when my bill is paid."*
>
> (Belfast, C2DE, Older family)

> *"That's a joke. My granddaughter waited a week in her new flat for electricity."*
>
> (L'Derry, C2DE, Older people 65+)

"Either the same day or within 24 hours if it's something more complicated."
(Coleraine, under 65 with disability)

When participants were asked to consider the GSS timeframe for a new supply these were largely viewed as acceptable:

"It's reasonable for a new supply at a domestic property within two working days and four working days for businesses."
(Belfast, C2DE, Older family)

"I would expect connection within the week for a new build."
(Belfast, C2DE, Older family)

In the absence of any direct impact on the customer of not having the power supply then the £25 payment level was also seen as acceptable, as was the £50 payment associated with not keeping an appointment.

"That's probably fair enough. If there is a new supply coming in, you're not living there without electricity £50 is fair enough."
(L'Derry, C2DE, Older people 65+)

Issues with pre-payment meters

The GSS for problems with pre-payment meters is to resolve the issue within three hours during a working day and four hours on any other day. Like the GSS relating to main fuse replacement, such problems must be reported within a specified timeframe for the GSS to apply.

Again participants were concerned as to whether the problem with a pre-payment meter would mean that the customer was without power. In this instance they stressed the need to be reconnected as quickly as possible. The one-off £25 payment was thought to be too low and there was no incentive for the provider to fix the issue after the time period had passed. Likewise there was some misunderstanding about the constraint of the timeframe given the wording of the GSS.

"It's the same as [main fuse replacement] your electric can be out until lunchtime the next day."
(Belfast, C2DE, Older family)

"We're paying in advance for our electric, so they should be out early to sort it out.... If it was you that broke it, then that would be a different situation."
(Coleraine, under 65 with disability)

"Good to know that people will come out so quickly for the pre-payment meters."
(Coleraine, under 65 with disability)

"I know my meter wasn't working, and they weren't there within three hours, they weren't there within three days!"
(Coleraine, under 65 with disability)

Voltage complaints

Currently if a customer has a voltage complaint the GSS is seven working days to make an appointment and five working days to explain if a visit is not required.

Most participants were not familiar with what a voltage complaint entails. Some guessed that it might mean flickering lights and power surges. Some were concerned that issues with voltage may have implications for the safety of the supply and could cause damage to equipment. If this was the case they considered that the timeframes within the GSS should be tightened.

> *"Seven days for a voltage complaint is a bit too long to wait."*
>
> (Belfast, C2DE, Older family)

> *"Seven working days to be seen is too long. You will be doing damage to your electrical goods if they are running with too much or too little power. If they are not working to full potential, I think they are one and the same and should be responded to equally."*
>
> (Belfast, ABC1, Young professionals)

> *"Well for us I don't think the voltage issue really affects domestic supply."*
>
> (L'Derry, C2DE, Older people 65+)

> *"If you have a voltage complaint, you can trip machinery, seven days just to make an appointment, or five days to say they don't need to come out is excessive."*
>
> (Omagh, ABC1, Young family)

For this standard participants were more concerned about the timeframe than the levels of payment. Due to their lack of understanding of the issue respondents did not have definitive views on the level of payment. However, a one-off payment was viewed as providing little or no incentive for the utility company to address the issue after the payment trigger timeframe.

4.6 Views on GSS in relation to gas

In the paragraphs that follow we discuss the views and issues that group participants and survey respondents raised in relation to GSS that are specific to their gas supply. As GSS are not currently in place for the gas sector in Northern Ireland, participants were asked about standards which are currently in place in England and Wales.

It is interesting to note that respondents to the quantitative survey were mainly pre-payment gas customers (62%), although a significant proportion payed by Direct Debit (25%). While the overall majority of prepayment meters was even larger for those in the C2DE group (78%), the majority (45%) of ABC1s paid by Direct Debit (Table 4.6.1). Younger householders (aged 16 to 29) were also much more likely to have a pre-payment gas meter (81% compared to 65% of 30 to 54 year olds and 50% of those aged 55 or over).

Table 4.6.1: Methods of payment for gas

	Gender		Age			SEG		Total
(Base: All gas respondents)	Male (447)	Female (556)	16 to 29 (161)	30 to 54 (474)	55 plus (368)	ABC1 (387)	C2DE (616)	(1003)
Pre-payment meter	59%	65%	81%	65%	50%	37%	78%	62%
Direct debit	27%	23%	10%	24%	32%	45%	12%	25%
Quarterly bill	14%	12%	9%	11%	18%	18%	10%	13%
Don't know	0%	0%	1%	0%	0%	0%	0%	0%
Total	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*

Table 4.6.2: Methods of payment for gas

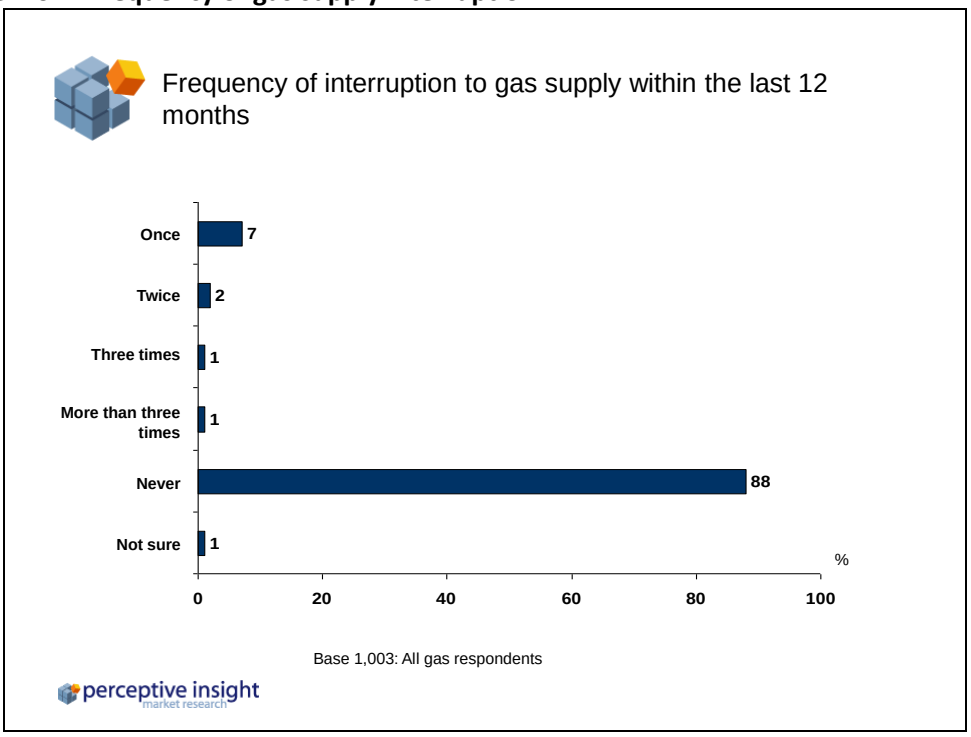
	Children			Disability		Total
(Base: All gas respondents)	No Children (635)	Child(ren) under 16 (368)	Child(ren) Under 5 (190)	Household disability (297)	No household disability (706)	(1003)
Pre-payment meter	55%	74%	70%	67%	60%	62%
Direct debit	29%	17%	18%	18%	28%	25%
Quarterly bill	15%	9%	12%	14%	12%	13%
Don't know	0%	0%	0%	0%	0%	0%
Total	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*

Supply restoration

Similar to electricity, participants stressed how dependent they were on their gas supply and the importance of speedy restoration in the case of outage.

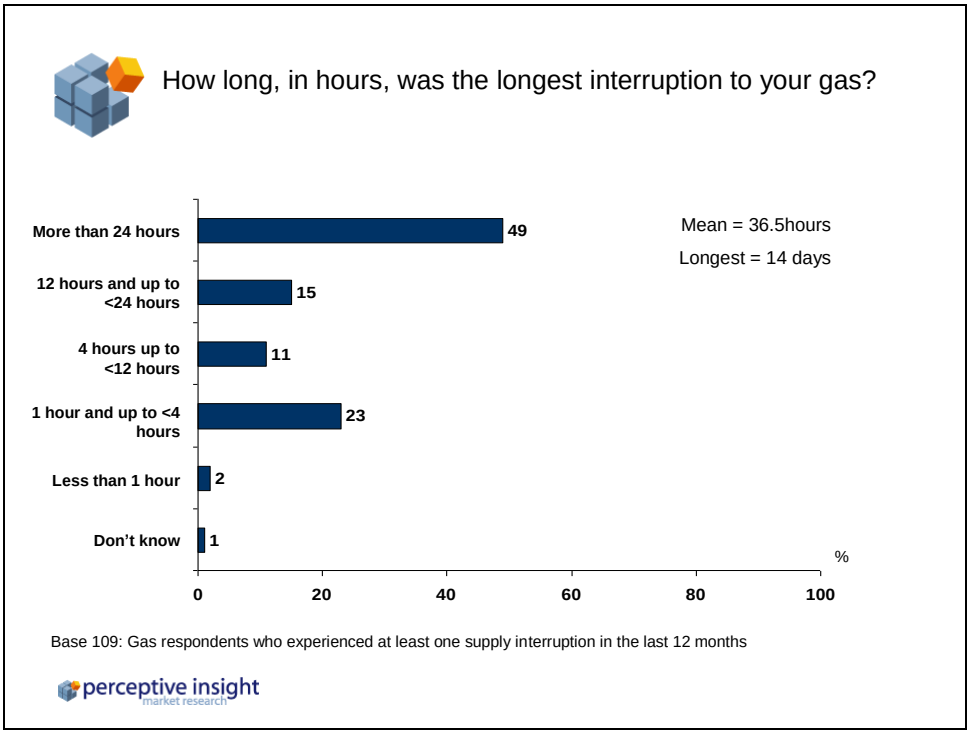
In the quantitative phase, 11% of respondents had experienced at least one interruption to their gas supply in the previous 12 months (Figure 4.6.1): 7% had one interruption, 2% had two, 1% had three, and 1% had experienced more than three breaks in supply.

Figure 4.6.1: Frequency of gas supply interruption



One quarter (25%) of gas supply interruptions lasted less than four hours (Figure 4.6.2). A further quarter (26%) was between 4 and 23 hours in duration. Just less than one half (49%) reported that the interruption lasted 24 hours or longer. The average length of interruption was 36.5 hours.

Figure 4.6.2: Duration of longest gas supply interruption



In the qualitative research, participants were aware of being dependent on their gas supply for cooking, heating and hot water.

> *"I could not do without my gas; I would have no heating or no hot water."*
> (Belfast, ABC1, Older family)

Prior to being shown the GSS, as they exist in England and Wales, participants were of the view that four to 12 hours was the maximum time acceptable for being without a supply. Their reasoning was that after this time period they would have to make alternative arrangements for cooking and heating. Participants also commented that the impact of not having their supply was greater in the winter months due to the need for heating.

> *"If the gas is off for more than 4 hours, you should be compensated."*
> (Belfast, C2DE, Older family)

Respondents to the survey were asked, without prompting, the maximum time they would expect it to take to restore a gas supply in normal conditions (Table 4.6.3). Just 4% thought it should take longer than 24 hours and a further 14% gave a response of between 18 hours and 24 hours. Three-quarters (76%) gave a response of up to 12 hours with half (51%) believing the maximum time should be four hours or less.

Similar to the findings relating to electricity, females were more likely to provide a shorter maximum time than males.

Table 4.6.3: What is the maximum amount of time you would expect it to take to restore your gas supply in normal conditions?

	Gender		Age			SEG		Total
(Base: Gas respondents)	Male (447)	Female (556)	16 to 29 (161)	30 to 54 (474)	55 plus (368)	ABC1 (387)	C2DE (616)	(1003)
Up to 2 hours	28%	37%	29%	34%	33%	30%	35%	33%
>2 and up to 4 hours	17%	20%	16%	18%	20%	19%	18%	18%
>4 and up to 8 hours	13%	12%	16%	14%	9%	16%	11%	13%
>8 and up to 12 hours	13%	11%	16%	10%	11%	14%	10%	12%
>12 and up to 18 hours	0%	0%	0%	0%	0%	0%	0%	0%
>18 and up to 24 hours	18%	11%	15%	16%	13%	13%	16%	14%
>24 and up to 48 hours	4%	2%	2%	2%	5%	3%	3%	3%
More than 48 hours	1%	1%	1%	1%	1%	0%	1%	1%
Don't know	6%	6%	6%	5%	8%	4%	7%	6%
Mean (hours)	8	7	7	7	9	7	8	8

Those with no children in their household had the lowest expectations with regard to maximum restoration time (Table 4.6.4).

Table 4.6.4: What is the maximum amount of time you would expect it to take to restore your gas supply in normal conditions?

	Children			Disability		Total
(Base: Gas respondents)	No Children (635)	Child(ren) under 16 (368)	Child(ren) Under 5 (190)	Household disability (297)	No household disability (706)	(1003)
Up to 2 hours	32%	35%	32%	41%	30%	33%
>2 and up to 4 hours	20%	16%	16%	19%	18%	18%
>4 and up to 8 hours	11%	16%	17%	9%	14%	13%
>8 and up to 12 hours	12%	11%	14%	8%	13%	12%
>12 and up to 18 hours	0%	0%	0%	0%	0%	0%
>18 and up to 24 hours	15%	14%	14%	14%	14%	14%
>24 and up to 48 hours	3%	2%	2%	2%	4%	3%
More than 48 hours	1%	0%	0%	1%	1%	1%
Don't know	6%	7%	6%	6%	6%	6%
Mean (hours)	11	8	8	8	7	8

In England and Wales the GSS standard is 24 hours to reconnect with £30 due if this target is not met. A further £30 is payable for each additional 24 hours without supply. Evidence from the focus group discussions suggests that the 24 hour timeframe for reconnection is seen as too long and the £30 payment level is seen as too low. Some suggested that the payment should be linked to the number of people in the household, due to the extra cost of having to buy 'take-away' food.

> *"24 hours is a long time to wait when you have kids, I have a two year old child. Twelve hours would be more acceptable."*
>
> (L'Derry, C2DE, Lone parents and families)

> *"I have five kids, so the compensation would not be enough, it would cost me £30 to go out and buy a takeaway."*
>
> (L'Derry, C2DE, Lone parents and families)

> *"It should be at least £50 compensation, or based on the amount of people who live in the household."*
>
> (Belfast, C2DE, young family)

Respondents to the survey were asked their view of a maximum of 24 hours to restore an interrupted gas supply (Tables 4.6.5 an 4.6.6). Echoing the findings from the focus groups 73% considered this to be too much with 57% saying it was far too much. One quarter thought that the time allowed was about right and just 1% thought it should be a bit more.

Again females (63%) and those who had someone in their household with a disability (66%) were more likely than any other groups to say that 24 hours to restore the gas supply was far too much.

Table 4.6.5: Opinion of the guaranteed standard for gas supply to be restored within a maximum of 24 hours, by gender, age and SEG

	Gender		Age			SEG		Total
(Base: Gas respondents)	Male (447)	Female (556)	16 to 29 (161)	30 to 54 (474)	55 plus (368)	ABC1 (387)	C2DE (616)	(1003)
It's far too much	49%	63%	53%	58%	58%	57%	57%	57%
It's a little too much	17%	15%	18%	15%	16%	19%	14%	16%
It's about right	31%	20%	26%	24%	24%	21%	26%	25%
Should be a little more	1%	1%	0%	1%	1%	1%	1%	1%
Should be a lot more	0%	0%	1%	0%	0%	1%	0%	0%
Don't know	2%	1%	2%	2%	1%	1%	2%	1%

Table 4.6.6: Opinion of the guaranteed standard for gas supply to be restored within a maximum of 24 hours, by household composition

(Base: All gas respondents)	No Children (635)	Child(ren) under 16 (368)	Child(ren) Under 5 (190)	Household disability (297)	No household disability (706)	(1003)
It's far too much	56%	58%	56%	66%	53%	57%
It's a little too much	17%	14%	17%	12%	17%	16%
It's about right	25%	23%	23%	20%	26%	25%
Should be a little more	1%	1%	0%	1%	1%	1%
Should be a lot more	0%	0%	1%	0%	0%	0%
Don't know	1%	3%	4%	1%	2%	1%

When asked their opinion of a maximum of 12 hours to restore an interrupted gas supply over half (55%) though it was too much with 40% regarding it as about right (Tables 4.6.7 and 4.6.8). Four percent thought it should be more. Again females and those who have someone with a disability in their household were more likely to think that the 12 hours maximum was too much.

Table 4.6.7: Opinion of the guaranteed standard for gas supply to be restored within a maximum of 12 hours, by gender, age and SEG

	Gender		Age			SEG		Total
(Base: Gas respondents)	Male (447)	Female (556)	16 to 29 (161)	30 to 54 (474)	55 plus (368)	ABC1 (387)	C2DE (616)	(1003)
It's far too much	25%	34%	27%	30%	30%	26%	32%	30%
It's a little too much	21%	28%	21%	26%	24%	26%	24%	25%
It's about right	49%	34%	47%	38%	40%	43%	39%	40%
Should be a little more	3%	3%	2%	3%	3%	3%	3%	3%
Should be a lot more	1%	1%	1%	1%	1%	1%	1%	1%
Don't know	1%	2%	2%	1%	1%	1%	1%	1%

Table 4.6.8: Opinion of the guaranteed standard for gas supply to be restored within a maximum of 12 hours, by household composition

(Base: All gas respondents)	No Children (635)	Child(ren) under 16 (368)	Child(ren) Under 5 (190)	Household disability (297)	No household disability (706)	(1003)
It's far too much	29%	32%	29%	35%	27%	30%
It's a little too much	24%	26%	24%	28%	24%	25%
It's about right	42%	38%	44%	32%	44%	40%
Should be a little more	3%	2%	1%	3%	2%	3%
Should be a lot more	1%	1%	0%	1%	1%	1%
Don't know	1%	2%	2%	1%	1%	1%

Respondents were asked their views of the current payment structure in England and Wales when a gas supply interruption lasts longer than 24 hours (Table 4.6.9). The majority (70%) considered the level to be about right whilst 16% thought it should be a little more and 8% a lot more. Just 3% thought it was too much. There was little difference in opinion by gender, age and SEG.

Table 4.6.9: The payment for gas supply interruption lasting longer than 24 hours in England and Wales is £30. Each additional 12 hours without supply a further £30 is due. Is this…

	Gender		Age			SEG		Total
(Base: Gas respondents)	Male (447)	Female (556)	16 to 29 (161)	30 to 54 (474)	55 plus (368)	ABC1 (387)	C2DE (616)	(1003)
It's far too much	2%	1%	3%	1%	1%	1%	1%	1%
It's a little too much	4%	1%	5%	1%	2%	2%	2%	2%
It's about right	68%	71%	75%	69%	70%	73%	68%	70%
Should be a little more	15%	16%	14%	16%	16%	16%	16%	16%
Should be a lot more	9%	7%	3%	10%	8%	6%	10%	8%
Don't know	1%	4%	1%	3%	4%	2%	3%	3%

Response to emergency call outs

Gas customers in the focus groups reported that it was important for them to have an emergency contact number, and to be able to depend on the utility to deal with the emergency promptly.

Some highlighted the cost of telephone calls, particularly when calling from mobiles, and stressed the need for a free-phone emergency number (as it was acknowledged that such calls are not always free from a mobile, it was felt important that emergency telephone contact would be free from both landlines and mobiles).

> *"Emergency numbers should be free-phone."*
>
> (L'Derry, C2DE, Lone parents and families)

Planned interruptions

All participants in the focus groups welcomed advanced notice of planned interruptions so that they could put alternative arrangements in place. They stressed the need to minimise the length of any planned interruptions.

It was pointed out that the impact of interruptions was less during the warmer summer weather and therefore any planned maintenance should be scheduled in the summer months if possible.

The GSS in England and Wales state that the gas companies there will give five days written notice of supply interruptions, and if they fail in this then a £20 payment would be due. Within the groups those with gas thought that the timeframe and payment level was acceptable.

Respondents to the survey were asked to say, unprompted, the minimum amount of notice that should be given for a planned interruption. As Table 4.6.10 shows 18% considered that less than 24 hours notice was sufficient, 43% said approximately one day and 18% opted for two days. One in five (19%) thought the minimum notice required should be three days or more.

Table 4.6.10: Minimum amount of notice required for planned gas supply cut lasting more than 4 hours

	Gender		Age			SEG		Total
(Base: Gas respondents)	Male (447)	Female (556)	16 to 29 (161)	30 to 54 (474)	55 plus (368)	ABC1 (387)	C2DE (616)	(1003)
Less than 4 hours	12%	13%	7%	9%	19%	9%	15%	12%
4 to 11 hours	5%	2%	1%	2%	7%	4%	3%	3%
12 to 23 hours	4%	3%	3%	3%	4%	4%	3%	3%
24 to 47 hours	41%	45%	40%	44%	43%	44%	43%	43%
2 days	17%	20%	25%	20%	13%	18%	18%	18%
3 days to 4 days	6%	3%	4%	6%	3%	6%	4%	5%
5 days to 6 days	1%	2%	2%	2%	0%	2%	2%	2%
Seven days or more	11%	11%	14%	13%	7%	14%	9%	11%
Don't know	2%	3%	2%	1%	4%	1%	4%	2%
Mean (hours)	47	47	57	51	37	54	43	47
High (days)	31	31	14	10	31	31	14	31

Reinstatement of premises

When discussing the reinstatement of premises in the qualitative phase, participants questioned why any holes could not be filled upon the completion of the work. They queried why the GSS standard implemented in England and Wales allowed up to five working days to complete this task.

Participants understood that on occasion work could not be completed in a day and therefore it was necessary to leave the hole open. However they stressed the need to make sure that the hole was made safe over night. A number quoted instances of holes being left open over night with inadequate barriers to stop the public from gaining access. Indeed some expressed the view that often the minimum of precautions were taken to secure temporary works.

"I have seen so many holes left, with boards over them."

(Belfast, C2DE, Older family)

Participants thought that more could be done to reinstate premises sooner particularly if it was affecting access to a property. However the £50 payment for not meeting the GSS target was viewed as appropriate as was the £50 for each additional five day period.

Meter reading and accuracy issues

One of the main issues to emerge in the qualitative phase in relation to gas was the frequency of meter readings. Many did not know if, when and how often their meter was read. This was due partly to the meter box on many of the homes being placed on the outside of the property and therefore not requiring the staff member who reads the meter to gain access to the premises.

One group suggested that the gas company could provide them with a statement of their gas usage so that they could monitor what they had been using. They felt the lack of information meant that they had no basis upon which to gauge their usage and monitor their bills and payments. Others commented that a card could be put through their door each time the meter was read to let them know this had happened.

The current standard for England and Wales states that in the case of a meter accuracy query, the customer should be provided with a written explanation within five working days or an offer to visit with seven working days. Failure to meet the standard would incur a payment of £20.

There was concern over the wording of this standard (similar to the concern raised in relation to the wording of the electricity GSS relating to this issue). Participants commented that it could easily be interpreted to mean that the appointment would take place within seven days – a standard which was acceptable provided that supply was not affected. However, seven days to offer an appointment was viewed as excessive.

"As long as your supply is still working, seven working days is ok for meter accuracy."

(Belfast, C2DE, Older family)

"If I thought the meter was wrong I would want reimbursed right away."

(L'Derry, C2DE, Lone parents and families)

"They should be coming out every six months to check your meter, maybe to help you with energy-saving tips."

(L'Derry, C2DE, Lone parents and families)

Issues with pre-payment meters

Similar to the electricity pre-payment meters the standard to repair or replace a gas meter within four hours was viewed as acceptable, even assuming that it was affecting supply. However, participants were concerned about the limitations placed on when they could inform the gas company and the implication of how long they could potentially be without gas if the problem occurred shortly after 8pm in the evening, i.e., it could take up to noon the next day to be reconnected.

"With the prepayments meters, they are saying they will repair or replace within four hours which I think is acceptable."

(Belfast, C2DE, Older family)

"With the pre-paid meters, the response time of four hours is reasonable."
(L'Derry, C2DE, Lone parents and families)

4.7 Views on GSS in relation to water

In the paragraphs that follow we summarise the views of customers in relation to the GSS as they may potentially apply to NI Water. As GSS are not currently in place for the water sector in Northern Ireland, participants were asked about standards which are currently in place in England and Wales.

Inadequate pressure

A small number of the participants said that they experienced some drop in pressure within their household linking it to times when their neighbours were also using water. However, it was viewed more as a nuisance rather than something that was critical to address.

The GSS in England and Wales state that failure to maintain pressure standards on two occasions lastings more than one hour within 28 days will trigger a payment of £25.

Participants expressed the view that even if water pressure was inadequate they still had some supply and therefore they could deal with the issue. As such, the £25 payment was viewed as acceptable.

"I don't think they should really pay in that circumstance, I think they should just focus on getting it sorted out."
(L'Derry, C2DE, Older people 65+)

"£25 compensation is fine, it your water pressure drops."
(L'Derry, C2DE, Lone parents and families)

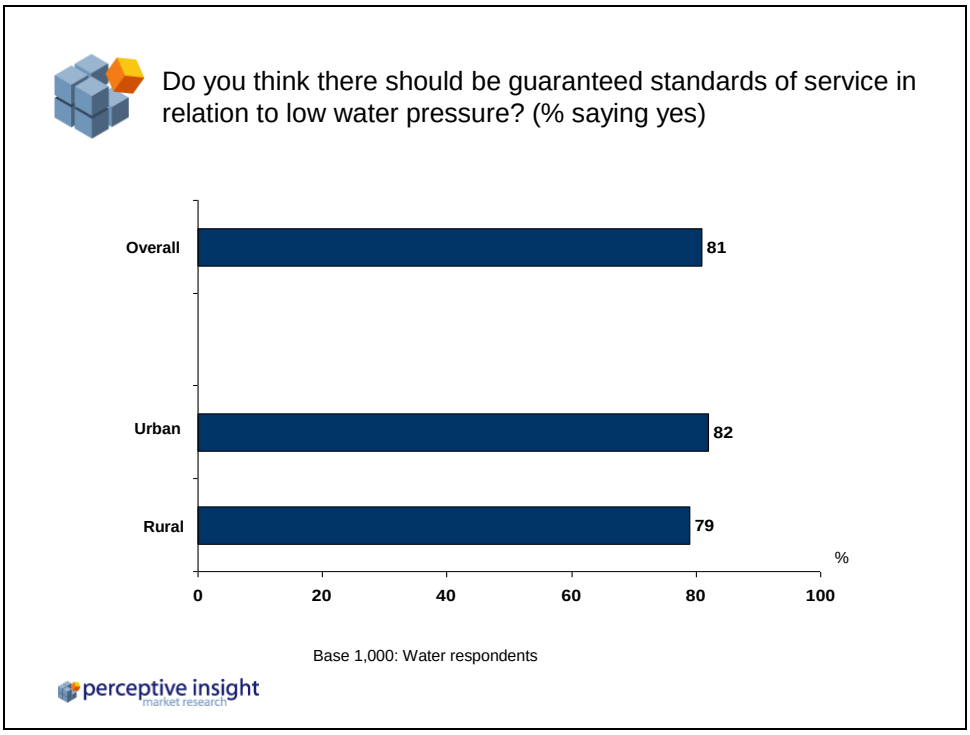
"Another problem is pressure. I think we share the pipe in our house with next door. When they're having a bath next door, the pressure in our house goes down."
(Newcastle, ABC1, Empty nesters)

"You can deal with low water pressure, as long as you have water – £25 is fine with that."
(Omagh, ABC1, Young family)

Survey respondents were asked if they thought there should be a GSS for low water pressure (Figure 4.7.1). The majority (81%) were in favour of this with little difference between those residing in a rural or urban area. Ninety-one percent of those who had an on-going issue with low water pressure[2] thought that there should be a GSS.

[2] Please note the low base of 22 respondents who have an ongoing issue with low water pressure

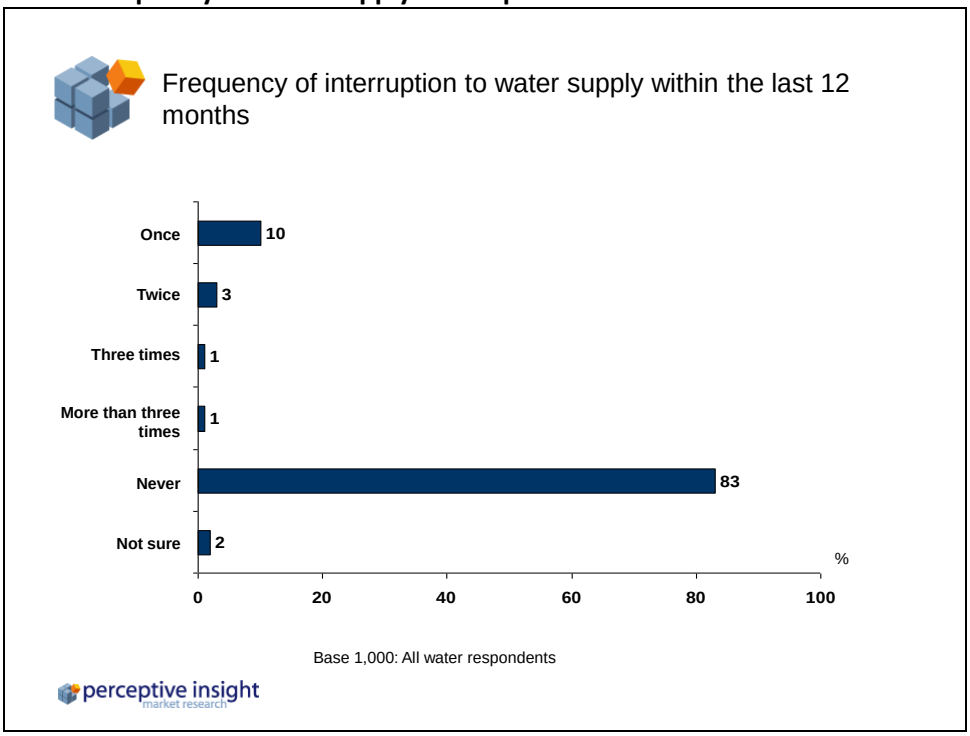
Figure 4.7.1: Views on a GSS for low water pressure



Experience of supply interruptions

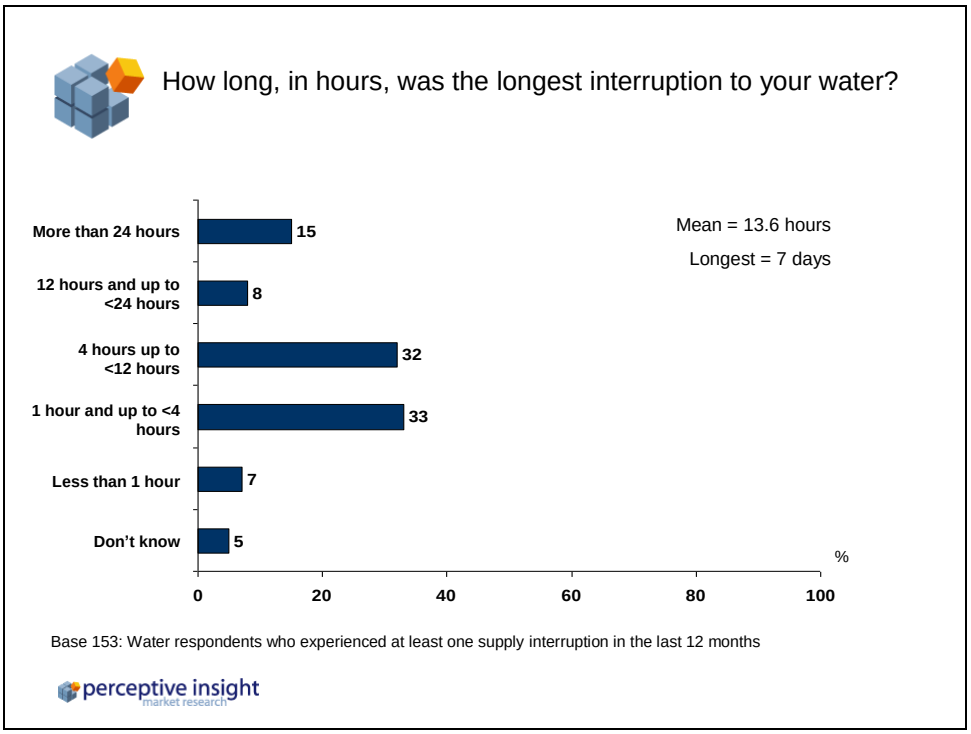
In the quantitative phase 83% of respondents had no interruption to their water supply within the previous 12 months (Figure 4.7.2). Ten percent had experienced one interruption, 3% had two, 1% had three and 1% had experienced more than three. There was little difference in the findings between those living in urban and rural areas.

Figure 4.7.2: Frequency of water supply interruptions



Respondents were asked the duration of the longest interruption to their water supply (Figure 4.7.3). Forty percent said that it lasted less than four hours, 32% reported that they were without water for between four hours and up to 12 hours, while 8% thought it lasted between 12 hours and up to 24 hour. Fifteen percent reported that the interruption was longer than one day.

Figure 4.7.3: Duration of longest water supply interruption



Notice of planned supply interruptions

One of the factors which influenced the views of people in the qualitative research on water supply interruptions (both planned and unplanned) was whether or not they had a cold water storage tank. Those with a storage tank reasoned that even with the water turned off they would still have enough water in their tanks to last four hours. Therefore, an interruption of this duration was viewed as inconvenient rather than critical.

> *"You have quite a bit of water in your cold water tank that will do you a while, and if you've any doubt you can boil it and it can cool down. You won't be stuck."*
> *(Newcastle, ABC1, Empty nesters)*

Participants thought that 48 hours notice of planned interruptions was acceptable as it allowed them to plan in advance of the event. One person also commented that they did not want too much notice as they may forget that the water is being turned off when the event happens.

The GSS payment of £20 for inadequate notice was considered acceptable. Others questioned whether it was appropriate to have a payment as they do not yet pay directly for water (although it was acknowledged that a contribution comes from the rates).

> *"We are not losing any money, because we don't pay for it."*
> (L'Derry, C2DE, Lone parents and families)

"Not enough money. £20 is a bit silly [for inadequate notice]. 24 hours is a long time... £50 is better, and for each additional 24 hours it should go up £10-£20 a day, so £80."

(Newcastle, ABC1, Empty nesters)

Survey respondents were asked their views of the minimum amount of notice required for a planned interruption to their water supply. A similar trend to electricity and gas was found with 20% considering that less than 24 hours notice was sufficient, 40% saying approximately one day and 19% opting for two days notice. One in five (21%) thought the minimum notice required should be three days or more. The average given was just over two days notice (Table 4.7.1).

Table 4.7.1: Minimum amount of notice required for planned water supply cut lasting more than 4 hours

	Gender		Age			SEG		Total
(Base: Water respondents)	Male (470)	Female (539)	16 to 29 (143)	30 to 54 (475)	55 plus (382)	ABC1 (455)	C2DE (545)	(1000)
Less than 4 hours	13%	12%	8%	10%	18%	10%	15%	13%
4 to 11 hours	6%	2%	3%	2%	6%	3%	4%	4%
12 to 23 hours	3%	3%	4%	3%	3%	3%	3%	3%
24 to 47 hours	35%	44%	45%	37%	40%	38%	41%	40%
2 days	21%	17%	20%	21%	15%	21%	17%	19%
3 days to 4 days	6%	4%	6%	5%	5%	6%	4%	5%
5 days to 6 days	3%	2%	1%	4%	2%	4%	2%	3%
Seven days or more	13%	13%	13%	17%	9%	15%	11%	13%
Don't know	1%	2%	1%	2%	2%	0%	3%	2%
Mean (hours)	51	50	51	58	41	56	46	51
Max (days)	14	14	14	14	14	14	14	14

Unplanned supply interruptions

When discussing unplanned interruptions a number of people recalled vans driving around their area with loud speakers to inform them that the water was going to be turned off. It was thought that this was a less common occurrence nowadays although it was viewed as a good way of giving people time to fill their kettles etc. to prepare for an unplanned interruption. Going without water for 24 hours was viewed as a hardship and participants wanted reassurances about how quickly a replacement supply would be in place.

The £10 GSS payment for each 24 hours that the water supply was interrupted was viewed as inadequate and did not reflect the inconvenience that was incurred. However, it was thought that the £20 late payment penalty would help to encourage NI Water to make the payment.

"As the situation continues, they should be heavily fined. Either by giving us money or by being fined by the government. I want them penalised for not doing their jobs."

(L'Derry, C2DE, Older people 65+)

Restoring supply

Respondents were asked to say, without prompting, the maximum amount of time they would expect it to take to restore an interrupted water supply in normal conditions. Just 2% thought that the time allowed should be over 24 hours, with 15% allowing between 18 and 24 hours. Over three-quarters (78%) gave a maximum time up to 12 hours, with over half (54%) thinking it should take no longer than four hours. Again, similar to electricity and gas, females and those households who have someone with a disability were more likely to give a shorter maximum time that other sub groups (Table 4.7.2 and table 4.7.3).

Table 4.7.2: What is the maximum amount of time you would expect it to take to restore your water supply in normal conditions?

	Gender		Age			SEG		Total
(Base: Water respondents)	Male (470)	Female (530)	16 to 29 (143)	30 to 54 (475)	55 plus (382)	ABC1 (455)	C2DE (545)	(1000)
Up to 2 hours	26%	36%	33%	34%	27%	30%	32%	31%
>2 and up to 4 hours	22%	24%	15%	24%	25%	25%	21%	23%
>4 and up to 8 hours	15%	13%	19%	13%	14%	17%	12%	14%
>8 and up to 12 hours	12%	8%	10%	10%	10%	12%	8%	10%
>12 and up to 18 hours	0%	0%	0%	0%	0%	0%	0%	0%
>18 and up to 24 hours	18%	13%	17%	15%	15%	12%	18%	15%
>24 and up to 48 hours	3%	2%	1%	2%	3%	1%	3%	2%
More than 48 hours	0%	0%	1%	0%	0%	0%	0%	0%
Don't know	4%	3%	3%	2%	5%	2%	4%	4%
Mean (hours)	11	8	10	9	9	9	10	9

Table 4.7.3: What is the maximum amount of time you would expect it to take to restore your water supply in normal conditions?

	Children			Disability		Total
(Base: Water respondents)	No Children (621)	Child(ren) under 16 (379)	Child(ren) Under 5 (197)	Household disability (257)	No household disability (743)	(1000)
Up to 2 hours	27%	37%	41%	37%	29%	31%
>2 and up to 4 hours	24%	21%	18%	23%	23%	23%
>4 and up to 8 hours	15%	13%	11%	11%	15%	14%
>8 and up to 12 hours	10%	9%	11%	9%	11%	10%
>12 and up to 18 hours	0%	0%	0%	0%	0%	0%
>18 and up to 24 hours	16%	15%	15%	14%	16%	15%
>24 and up to 48 hours	3%	2%	1%	3%	2%	2%
More than 48 hours	1%	0%	0%	0%	1%	0%
Don't know	4%	3%	2%	5%	3%	4%
Mean (hours)	10	8	8	8	10	9

Respondents were asked their views of a maximum of 24 hours to restore the water supply (Tables 4.7.4 and 4.7.5). Just over one quarter (26%) thought that time timeframe was about right. However, 72% believed it was too much with 54% saying it was far too much.

As before, females (60%) and households who have someone with a disability (60%) were more likely than other sub-groups to comment that the 24 hour timeframe was far too much.

Table 4.7.4: If the guaranteed standard for water was to restore supply within a maximum of 24 hours, is this…

	Gender		Age			SEG		Total
(Base: Water respondents)	Male (470)	Female (530)	16 to 29 (143)	30 to 54 (475)	55 plus (382)	ABC1 (455)	C2DE (545)	(1000)
It's far too much	48%	60%	52%	57%	53%	56%	53%	54%
It's a little too much	19%	16%	17%	17%	18%	19%	16%	18%
It's about right	30%	22%	27%	24%	27%	23%	28%	26%
Should be a little more	1%	1%	1%	1%	1%	1%	1%	1%
Should be a lot more	0%	0%	0%	0%	0%	0%	0%	0%
Don't know	1%	1%	3%	1%	1%	1%	2%	1%

Table 4.7.5: If the guaranteed standard for water was to restore supply within a maximum of 24 hours, is this…

(Base: Water respondents)	No Children (621)	Child(ren) under 16 (379)	Child(ren) Under 5 (197)	Household disability (257)	No household disability (743)	(1000)
It's far too much	53%	56%	52%	60%	53%	54%
It's a little too much	18%	17%	19%	13%	19%	18%
It's about right	27%	23%	24%	24%	26%	26%
Should be a little more	1%	1%	2%	1%	1%	1%
Should be a lot more	0%	0%	0%	0%	0%	0%
Don't know	1%	2%	3%	2%	1%	1%

Respondents were asked to comment on a maximum time of 12 hours to restore an interrupted water supply (Tables 4.7.6 and 4.7.7). Two in five (40%) thought that a maximum of 12 hours was about right. However, over half (56%) believed it to be too much, with 30% saying it was far too much. Just 3% thought the 12 hour time frame to restore supply was too short.

Table 4.7.6: If the guaranteed standard for water was to restore supply within a maximum of 12 hours, is this…

	Gender		Age			SEG		Total
(Base: Water respondents)	Male (470)	Female (530)	16 to 29 (143)	30 to 54 (475)	55 plus (382)	ABC1 (455)	C2DE (545)	(1000)
It's far too much	27%	33%	28%	32%	28%	30%	30%	30%
It's a little too much	22%	28%	22%	25%	28%	25%	26%	26%
It's about right	47%	34%	47%	39%	39%	42%	39%	40%
Should be a little more	2%	2%	2%	2%	3%	2%	3%	2%
Should be a lot more	1%	1%	0%	1%	1%	1%	0%	1%
Don't know	1%	2%	1%	1%	2%	1%	2%	1%

Table 4.7.7: If the guaranteed standard for water was to restore supply within a maximum of 12 hours, is this…

(Base: Water respondents)	No Children (621)	Child(ren) under 16 (379)	Child(ren) Under 5 (197)	Household disability (257)	No household disability (743)	(1000)
It's far too much	27%	35%	33%	35%	28%	30%
It's a little too much	27%	23%	21%	25%	26%	26%
It's about right	41%	39%	44%	35%	42%	40%
Should be a little more	3%	2%	1%	2%	2%	2%
Should be a lot more	1%	1%	0%	1%	1%	1%
Don't know	1%	2%	2%	2%	1%	1%

Respondents were asked their views of the current payment structure in England and Wales where if a small mains burst lasts longer than 12 hours and a large main burn takes longer than 48 hours to repair then a payment of £20 is due. (Table 4.7.8) A further £10 is due after each additional 24 hours. Just less than half (48%) believed this payment structure to be about right. However, 48% thought it should be more with 27% thinking it should be a lot more.

Table 4.7.8: The payment for water supply interruption lasting longer than 12 hours for a small mains burst and 48 hours for a large mains burst in England and Wales is £20. Each additional 24 hours without supply a further £10 is due. Is this…

	Gender		Age			SEG		Total
(Base: Water respondents)	Male (470)	Female (530)	16 to 29 (143)	30 to 54 (475)	55 plus (382)	ABC1 (455)	C2DE (545)	(1000)
It's far too much	2%	1%	1%	0%	3%	1%	1%	1%
It's a little too much	2%	1%	3%	1%	2%	1%	2%	1%
It's about right	51%	45%	43%	46%	52%	49%	47%	48%
Should be a little more	20%	22%	24%	22%	18%	22%	20%	21%
Should be a lot more	24%	30%	28%	30%	24%	27%	28%	27%
Don't know	1%	2%	1%	1%	2%	1%	2%	2%

Internal flooding from sewers

The qualitative research found that internal flooding from sewers was viewed as particularly abhorrent. Participants thought that steps should be put in place to ensure that the householder is provided with adequate resource to enable them to clean up the situation as quickly as possible.

The GSS in England and Wales states that the bill payer will receive an amount which is equal to what they pay annually for their sewerage service. Participants were concerned that this would be the only payment available to customers and that compensation would not be available for the damage done to their premises or for the clean-up. If this was the case then the GSS payment level was too low. However, if it was in addition to compensation, and not just a claim on their insurance, then it was acceptable. While customers in this situation can, in fact, apply separately for compensation, this was neither widely known nor contained in the GSS wording.

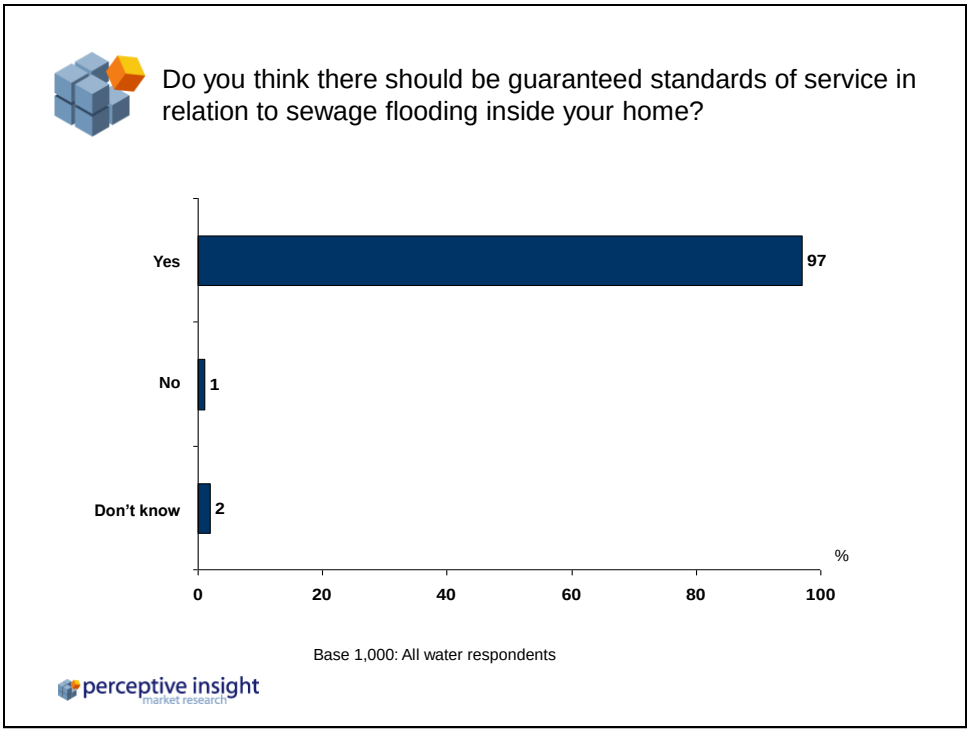
> *"That's a really horrific thing, it's much worse than not keeping a two hour appointment. If in some way you have paid for a sewerage service, and it hasn't worked, they should pay you back the money you paid for the service."*
>
> (Newcastle, ABC1, Empty nesters)

> *"I would want to be compensated for everything that was destroyed."*
>
> (L'Derry, C2DE, Lone parents and families)

> *"I don't think £150 is sufficient for flooding. How do they decide on that? £1000 as a maximum if your whole house is swimming in sewage is ridiculous. If you have to move out, find somewhere else to stay meantime, get rid of all of your stuff and so on, it wouldn't be anywhere near enough."*
>
> (Coleraine, under 65 with disability)

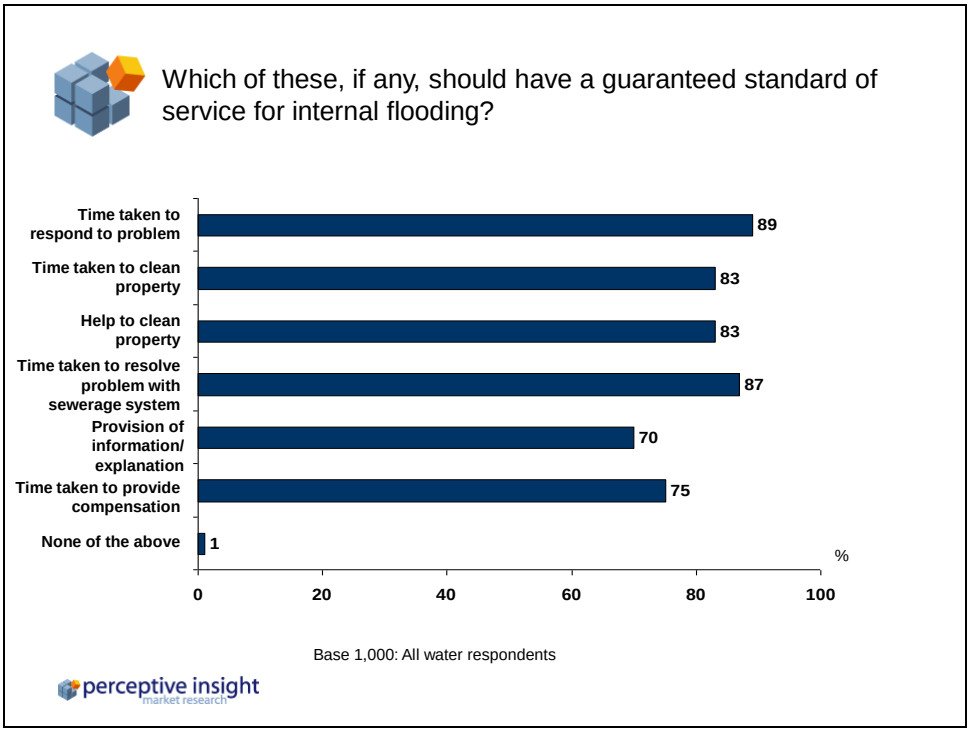
The quantitative research showed that the vast majority (97%) thought that there should be guaranteed standards of service in relation to sewage flooding inside their home (Figure 4.7.4).

Figure: 4.7.4: Views on a GSS for internal flooding



The majority thought also that all areas of service with regards to internal flooding should have a guaranteed standard of service, in particular, the time frame in which flooding is dealt with (89%). A further 87% believed there should be a GSS for the time taken to resolve a problem with the sewerage system (87%) and 83% said a GSS is required for the time taken and help to clean the property (Figure 4.7.5).

Figure 4.7.5: Views on which service aspects of internal flooding that should have a GSS



External flooding

Participants in the qualitative strand debated how serious external flooding of sewage was. A number regarded it as almost as serious as internal flooding due to the impact it has on the householder.

The GSS currently in place in England and Wales states that the bill payer is entitled to half the amount of their annual sewerage bill in the case of external flooding. For some this was considered as acceptable. Others thought the payment should be set to a similar level as for internal flooding. The point was made by one person that if the flooding was cleaned up as quickly as possible and compensation paid for any damage an additional payment would not be necessary. As with internal flooding from sewers, customers in this situation can apply separately for compensation but participants were not generally aware of this and the GSS wording does not refer to compensation.

> *"If they are responsible for the mess they should clean it up."*
>
> (L'Derry, C2DE, Lone parents and families)

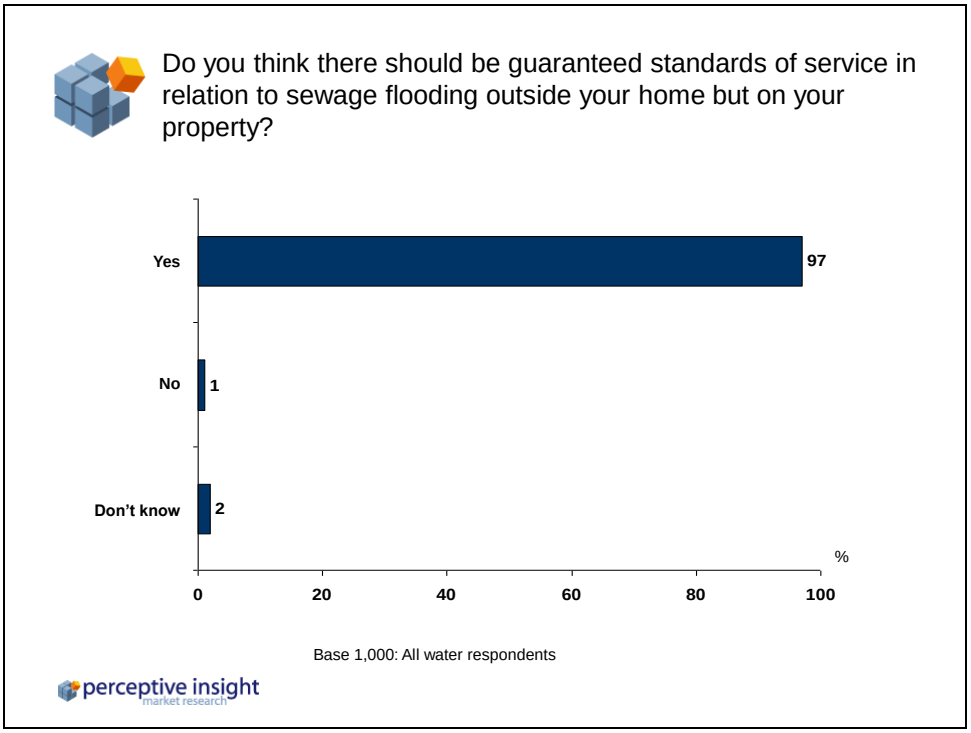
> *"That's not enough. It's nearly as bad as having sewage inside the house. It should be the same as inside the house."*
>
> (Newcastle, ABC1, Empty nesters)

> *"It would depend what you have on your land and property, if you had vegetables that you eat, it would be much worse."*
>
> (Newcastle, ABC1, Empty nesters)

> *"Why bother, why not just compensate people and get it sorted out as quickly as possible? That payment could just be put into compensation as well."*
>
> (Omagh, ABC1, Young family)

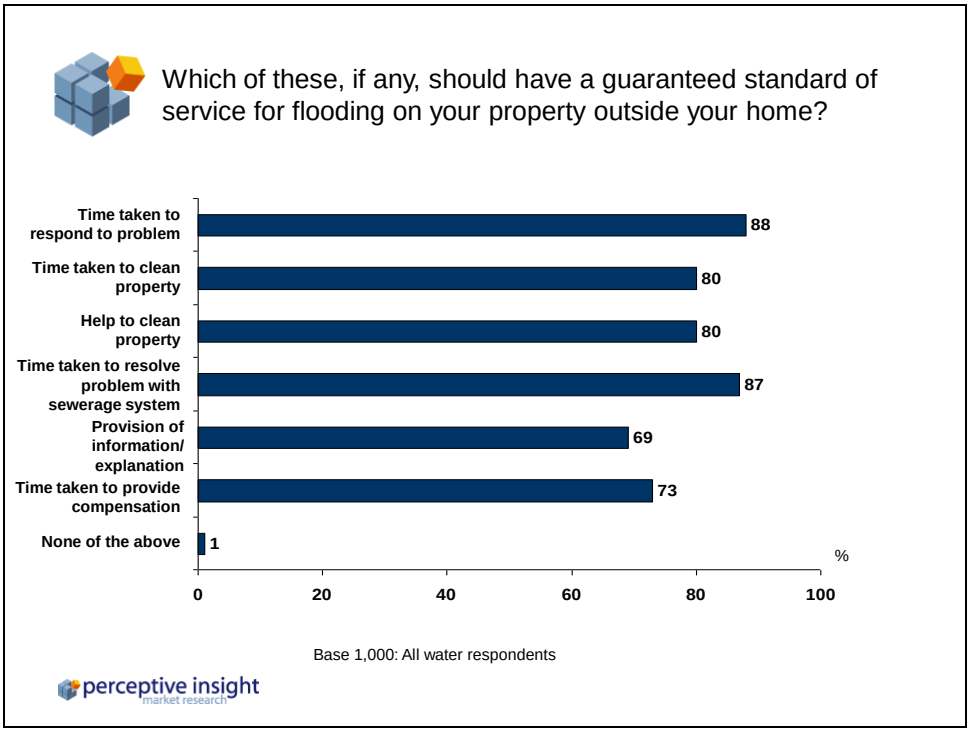
Similarly to that of internal flooding, 97% of survey respondents thought that there should be a guaranteed standard of service in relation to sewage flooding outside their home but on their property (Figure 4.7.6).

Figure 4.7.6: Views on GSS for external flooding



Again, the majority of respondents thought that there should be a guaranteed standard of service for all aspects of flooding outside the home, in particular the time taken to respond to the problem (88%) and to resolve the problem with the sewerage system (87%) (Figure 4.7.7).

Figure 4.7.7: Views on which service aspects of external flooding that should have a GSS



5. Key findings: views of non-domestic customers

In this section we present qualitative findings from both the ten semi-structured depth interviews with non-domestic customers and quantitative findings from the survey of 411 of this type of customer. As detailed in the introduction and approach section, interviewees and respondents were drawn from a range of business and public service sectors including agriculture, manufacturing, construction, hospitality, education and healthcare. Both strands sought to explore views across this range of sectors and levels of utility use, as well as achieving a geographical spread.

The section has been structured under the following headings:

- 5.1 Awareness of, and views on, the principle of GSS;
- 5.2 Experience of generic aspects of utility services;
- 5.3 Views on generic aspects of GSS;
- 5.4 Experience of electricity services and views on electricity GSS;
- 5.5 Experience of gas services and views on gas GSS; and
- 5.6 Experience of water services and views on water GSS.

It should be noted that within this section, weighting has been applied to overall totals to ensure findings were representative of the structure of businesses in Northern Ireland. Weighting has not, however, been applied to cross-tabular analyses (such as company size or sector and utility type). Please see Appendix A for more detail on this.

5.1 Awareness of, and views on, the principle of GSS

Levels of awareness

The majority of interviewees who took part in the qualitative depth interviews were either unaware of the existence of the Utility Regulator, or uncertain of its role, having assumed utility regulation in Northern Ireland came under the auspices of Ofwat and Ofgem. There was even lower awareness of guaranteed standards which have been implemented within the electricity sector in Northern Ireland, with just one of the ten non-domestic interviewees having heard of them.

> *"People don't know about it, it should be in their literature."*
>
> (Construction, East, Low-Med)

However, the quantitative survey showed that 17% of non-domestic customers had heard of guaranteed standards of service for electricity in Northern Ireland. Larger organisations (with more than 50 employees) were more likely to be aware of the GSS for electricity (25%) than smaller organisations (19% of those with 10 to 49 employees and 18% of those with less than 10 employees) (Table 5.1.1).

Table 5.1.1: Awareness of guaranteed standards (for electricity in NI) by size and sector

	No of employees			Sector				Total
(Base: All respondents)	<10 (161)	10 to 49 (162)	50 or more (88)	Agriculture (74)	Manufacturing (104)	Construction (101)	Service (132)	(411) (weighted)
Yes	18%	19%	25%	22%	19%	20%	19%	17%
No	81%	81%	73%	78%	80%	79%	80%	83%
Not sure	1%	1%	2%	0%	1%	1%	2%	1%
Total	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*

One in five (21%) were aware of the goodwill payments that are provided when an electricity company in NI fails to meet a guaranteed standard of service (Table 5.1.2). Again, larger organisations were slightly more likely to be aware of this than smaller companies. It is interesting to note the difference in those aware of GSS and those aware of the payments. This, in part, may be due to the lack of recognition of the terminology GSS.

Table 5.1.2: Awareness of GSS payments (in electricity sector in NI) by size and sector

	No of employees			Sector				Total
(Base: All respondents)	<10 (161)	10 to 49 (162)	50 or more (88)	Agriculture (74)	Manufacturing (104)	Construction (101)	Service (132)	(411) (weighted)
Yes	22%	23%	27%	31%	22%	21%	23%	21%
No	76%	77%	73%	68%	77%	78%	77%	78%
Not sure	1%	1%	0%	1%	1%	1%	0%	1%
Total	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*

One in twenty non-domestic customers who were aware of GSS payments (5%) reported that they had received one in the previous 3 years (representing 5 of the 411 respondents) (Table 5.1.3).

Table 5.1.3: Receipt of payments over the last 3 years by size and sector

	No of employees			Sector				Total
(Base: Respondents aware of GSS payments)	<10 (36)	10 to 49 (37)	50 or more (24)	Agriculture (23)	Manufacturing (23)	Construction (21)	Service (30)	(87) (weighted)
Yes	6%	5%	4%	9%	9%	5%	0%	5%
No	94%	95%	96%	91%	91%	95%	100%	95%
Total	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*

Views on the principle

Within the qualitative depth interviews the principle of guaranteed standards of service (GSS) was welcomed by all. GSS were perceived as a means of driving and sustaining improved service. Many comments referred to experiences characterised by higher levels of

satisfaction with electricity and gas services, which interviewees perceived to be related to a greater degree of competition in those sectors compared to the lower levels of satisfaction in the water sector which is currently served by just one supplier.

It is also fair to say that interviewees expressed a degree of cynicism regarding how realistic the specific levels of service promised by the GSS were, and how strictly the standards would be enforced, particularly where their own past experiences were at odds with the standards presented for discussion.

Despite this cynicism, GSS were seen as a positive development. Payments for failing to meet GSS standards were viewed as unnecessary to non-domestic customers, and the payment levels discussed were seen as incidental to such customers.

> *"The goodwill payments are irrelevant for us, but I do think we should definitely have standards. They will help us, a system and mechanisms like this are important to us. I don't think they have really covered it. From our perspective the goodwill payments needn't drive that."*
>
> (IT/Electronics, West, High)

The quantitative survey showed that nine out of ten non-domestic customers (91%) were in favour of the concept of GSS as a way of ensuring minimum standards of service across the three utilities (Table 5.1.4). Just 2% rated the idea as quite or very bad.

Table 5.1.4: What do you think about the idea of guaranteed standards as a way of ensuring minimum standards of service across all 3 utilities? By size and sector

	No of employees			Sector				Total
(Base: All respondents)	<10 (161)	10 to 49 (162)	50 or more (88)	Agriculture (74)	Manufacturing (104)	Construction (101)	Service (132)	(411) (weighted)
A good idea	78%	81%	83%	78%	79%	78%	83%	79%
Quite a good idea	13%	10%	10%	9%	11%	13%	12%	12%
Neither a good nor a bad idea	8%	7%	7%	9%	10%	9%	4%	8%
Quite a bad idea	1%	1%	0%	1%	1%	0%	0%	1%
A very bad idea	1%	1%	0%	1%	0%	0%	1%	1%
Total	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*

Competition and standards

The qualitative depth interviews showed that non-domestic customers were of the opinion that increased competition within the utility sectors is both possible and desirable, suggesting that a more open market would foster a stronger focus on the customer.

> *"Yes, the utility provider should have guaranteed service, and those should be much more stringent, as it's not an open market."*
>
> (Tourism, East, High)

Interviewees were of the opinion that the relative openness of the electricity sector had increased the customer focus of electricity companies, while the gas sector was seen in a similar light. However, the closed nature of water and sewerage services was seen to detract

from the need for a customer-focused approach within that sector, with interviewees expressing frustration at the lack of choice and lack of a driver to improve services in that sector.

> *"Electricity and gas have been quite good. The main problems have been with NI Water. They haven't been massive problems. I think it's because there is no competition. If we don't like it, there is nowhere else to go. It would have been much easier to say from March we are going out to tender. Not even from a price perspective. ..We are looking to work in partnership with the utilities."*
>
> (Healthcare, East, High)

While 91% of non-domestic customers rated the concept of GSS as a good idea, the percentage supporting payments as a way of ensuring standards was lower (79%), with 7% rating this as a bad idea (Table 5.1.5). Support for payments was highest among larger organisations (89%), with those in the agriculture sector least likely to support it.

Table 5.1.5: What do you think of the idea of making payments as a way of ensuring minimum standards of service are met by utility companies? By size and sector

	No of employees			Sector				Total
(Base: All respondents)	<10 (161)	10 to 49 (162)	50 or more (88)	Agriculture (74)	Manufacturing (104)	Construction (101)	Service (132)	(411) (weighted)
A good idea	63%	73%	76%	55%	71%	74%	74%	65%
Quite a good idea	15%	14%	13%	15%	15%	14%	13%	14%
Neither a good nor a bad idea	15%	8%	9%	22%	8%	10%	8%	14%
Quite a bad idea	4%	1%	2%	5%	4%	0%	2%	4%
A very bad idea	2%	3%	0%	3%	2%	2%	2%	3%
Total	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*

Views on GSS payment levels

Within the qualitative research interviewees were asked about a range of existing GSS from NI (electricity) and England and Wales (gas and water). The goodwill payments associated with failing to meet these GSS ranged from a fee of £20 for incidents such as failing to keep appointments to a capped maximum of £1,000 for internal flooding from sewers. Some goodwill payments contained extra payments according to the length of time taken to meet a standard, while the majority were one-off flat payments.

In general, non-domestic customers we spoke to during the qualitative phase regarded the payment levels as too small to have any impact on their organisations. Indeed three interviewees from larger organisations suggested that the administrative costs associated with recouping such goodwill payments would exceed the payments themselves. Interviewees were satisfied that GSS payments were a goodwill gesture and not intended to compensate customers for costs incurred by the failure of a utility company to meet agreed standards.

> *"£25 as a goodwill gesture is reasonable enough, but in terms of money lost it doesn't come close."*
>
> (Agriculture, NI, Low-High)

Indeed, interviewees recognised that while such payments were likely to be important to domestic customers and desirable to smaller businesses, they were irrelevant to larger non-domestic customers, and as such they felt non-domestic customers should be excluded from GSS payments, or that the format of payments should be amended to minimise the administrative burden associated with claiming them (discussed in greater detail below).

> *"From a non-domestic point of view I would say these figures are irrelevant. They don't reflect the impact that an outage can have for a company like us on one of our premises... I'm more concerned that the matter is dealt with swiftly and with least inconvenience to our customers and guests."*
>
> (Tourism, East, High)

> *"While I appreciate that these things can happen and we may have to deal with them such a payment is irrelevant."*
>
> (Education, East, Low-Med)

> *"The payments are irrelevant to any businesses."*
>
> (Construction, East, Low-Med)

> *"I don't think that £25 to an organisation like this means a lot. To a domestic customer it's not a bad wee payment. For us though, to process that, would cost us at least that, and maybe twice it from an administration point of view... You would nearly need to be starting at £100 for the true costs for administrating it to be absorbed and still have some over and above."*
>
> (Healthcare, East, High)

> *"There should be a differentiation between small and large companies."*
>
> (Tourism, East, High)

Overall, it was clear that what was important for non-domestic customers was the standard of service itself, and not the goodwill payments, as they felt such small payments could not drive service improvements.

> *"Reliability of service comes top of my list. It is much more important than any payment – they could multiply those payment figures by 10 and it wouldn't make a difference."*
>
> (Education, East, Low-Med)

Views on the likelihood of payments driving improvements

The non-domestic customers interviewed in the qualitative phase had mixed views about the extent to which GSS payments would drive improvements in service standards. While some felt that GSS payments would act as a penalty on utility companies, and might therefore have the potential to increase efficiency, others felt such low payment levels were incidental to large utility companies.

Concerns were also expressed about flat payments actually having the opposite effect (since once a utility company fails to meet a standard the payment is made and in most cases there is no further penalty).

> *"It should be on a sliding scale... The payments aren't important, the consequence should be on the supplier, bringing back to the sliding scale, to make them more*

> *inclined to try to fix it within the 24 hours. I think what we would want is more emphasis on the level of response rather than a penalty. I think an hourly scale would be more appropriate. I don't see how it would make the lack of service any better to us, and especially not to the engineer who has been out all night waiting for NIE."*
>
> (Healthcare, East, High)

Interviewees from larger organisations with high levels of utility use suggested that accountability and public scrutiny were the most effective drivers of improvement in services, and that the only way GSS payments at the current level would improve standards would be if statistics on GSS payments were publicised as indicators of performance.

> *"I think there should be a wee bit of clarity with the payments they have to make. There should be something on their website or on the Regulator's website to show the amount and the number of occasions that they have paid out. They could display it monthly. I think the goodwill payments will probably make them more efficient, but I think there should be more transparency with them. Their key performance indicators should be published, rather than always waiting for a politician to apply for a FOI."*
>
> (Healthcare, East, High)

Views on the format of GSS payments and method of claiming them

Qualitative interviewees generally felt that, if implemented, payments should be automatic rather than being dependent on customers claiming them. Exceptions to this were circumstances where the utility company might not be aware that a standard had not been met without being informed by the customer. Overall, clear communication on whether or not they would be automatic or claimed was seen as most important.

> *"I think most of these GSS seem ok, but there should be clarity on whether it is claimed or automatic payment."*
>
> (Healthcare, East, High)

Interviewees generally felt that if implemented, the process of recouping GSS payments would need to take account of the business needs of non-domestic customers. To this end, a number of different payment formats and modes of collection were suggested, including accumulated payments, and tariff reductions in lieu of payment.

> *"Small individual payments are relatively useless. Unless they gave us a larger accumulated payment, quarterly or something, that would be better. We have 200 plus buildings, and these payments could ramp up a bit, but small payments would just get lost."*
>
> (Healthcare, East, High)

> *"A percentage reduction on the bill would be good."*
>
> (Manufacturing, Rural, Med)

> *"For all you're talking about, it's probably not worth it. A reduction in the tariff would be better. By the time you ring them up trying to chase the £25 it wouldn't be worth your while."*
>
> (Retail, South, High)

The quantitative survey showed that non-domestic customers would like to see a range of methods for reimbursement of GSS payments (Table 5.1.6). Just less than half (47%) opted for a credit to their bill, 35% requested payment by cheque and 16% wanted a reduction in their tariff.

Larger organizations (57% of those with 50 plus employees) and those in the manufacturing (59%) and service (55%) sectors were more likely to say they preferred a credit to their bill. Smaller organizations (36%) and those in the agriculture sector (39%) were more likely to request payment by cheque.

Table 5.1.6: Preferred method of reimbursement for a GSS payment by size and sector

	No of employees			Sector				Total
(Base: All respondents)	<10 (161)	10 to 49 (162)	50 or more (88)	Agriculture (74)	Manufacturing (104)	Construction (101)	Service (132)	(411) (weighted)
A credit to your bill	45%	54%	57%	41%	59%	46%	55%	47%
By cheque	36%	26%	26%	39%	23%	33%	28%	35%
A reduction in your tariff	16%	17%	15%	12%	17%	20%	15%	16%
Any method	1%	2%	0%	5%	1%	0%	0%	1%
Something else	1%	1%	2%	1%	0%	2%	2%	1%
Don't agree with payments	1%	0%	0%	1%	0%	0%	0%	1%
Total	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*

Responsibility for promoting GSS

While a minority of qualitative interviewees (2) felt that a body such as the Utility Regulator should be responsible for promoting awareness of GSS amongst customers, the majority felt this responsibility should be borne by the individual utility companies with the Utility Regulator taking on an enforcement role. All, including those who felt the Utility Regulator should have prime responsibility for promotion of GSS, felt that utility companies had a role to play. It was recognised that customers were not aware of current electricity GSS, despite the onus being on individual electricity companies to raise awareness in this respect.

> *"If the Utility Regulator is doing it for the three companies, maybe in conjunction with the Consumer Council, they should be responsible. They would be the perfect vehicle for that. But the individual companies themselves should make people aware, on their bills or websites... Do NIE tell you about these GSS? I don't think they do."*
>
> (Agriculture, NI, Low-High)

> *"I think each utility provider should be responsible. If they do it right, it should be part of the package with them. They should promote their service standards as a feature of their service."*
>
> (Tourism, East, High)

> *"The companies themselves should be letting consumers know about it. There should be something in their bills or documentation that lets you know your rights. The Regulator should be enforcing this."*
>
> (Financial services, West, Low)

These findings were reflected in the quantitative research, which showed that 61% of non-domestic customers felt the individual utility companies should be responsible for informing consumers of the guaranteed standards of service (Table 5.1.7). Forty seven percent thought that this role should be handled by the Utility Regulator (the format of the question enabled respondents to select more than one option in response).

Table 5.1.7: Who should be responsible for making consumers aware of guaranteed standards of service? By size and sector

	No of employees			Sector				Total
(Base: All respondents)	<10 (161)	10 to 49 (162)	50 or more (88)	Agriculture (74)	Manufacturing (104)	Construction (101)	Service (132)	(411) (weighted)
Individual utility companies	62%	65%	63%	68%	66%	56%	64%	61%
The Utility Regulator	47%	48%	56%	46%	41%	58%	49%	47%
Someone else	1%	3%	1%	1%	3%	2%	1%	1%

5.2 Experience of generic aspects of utility services

Non-domestic customers were asked about their experience in relation to their electricity, water and gas over the previous 12 months. In the following paragraphs we detail the extent to which they have experienced each of the following:

- Making a call to query a bill;
- Making a call to query the accuracy of your meter;
- Making a complaint;
- Having a pre-arranged visit by the utility company;
- Requesting an emergency call out;
- An interruption to supply lasting more than 12 hours; and
- An interruption to supply lasting more than 24 hours.

Overall non-domestic customers were most likely to make a call to query a bill in relation to their water supply (13%) with 10% doing so in relation to their electricity and 9% for gas (Table 5.2.1).

It is interesting to note a number of differences by size and sector. For example, 24% of large businesses (those with more than 50 employees) had made a call in relation to their water bill. Those in manufacturing were more likely to have queried their electricity bill (22%) than other sectors.

Table 5.2.1: Incidence of making a telephone call to query a bill by size and sector

	No of employees			Sector				Total
(Base: All respondents)	<10 (161)	10 to 49 (162)	50 or more (88)	Agriculture (74)	Manufacturing (104)	Construction (101)	Service (132)	(411) (weighted)
Electricity	9%	19%	16%	9%	22%	12%	14%	10%
Water	12%	15%	24%	15%	16%	13%	17%	13%
Gas	7%	11%	8%	17%	15%	8%	6%	9%
Did not make any call	80%	70%	65%	77%	65%	78%	72%	78%

Meter accuracy was queried by 6% of those with gas, 5% in relation to water and 2% with regard to electricity (Table 5.2.2). The accuracy of electricity meters was queried most by those in the construction sector, whilst the accuracy of gas meters was most likely to be queried by those in the agriculture sector.

Table 5.2.2: Incidence of making a telephone call to query the accuracy of your meter by size and sector

	No of employees			Sector				Total
(Base: All respondents)	<10 (161)	10 to 49 (162)	50 or more (88)	Agriculture (74)	Manufacturing (104)	Construction (101)	Service (132)	(411) (weighted)
Electricity	2%	6%	5%	4%	5%	6%	3%	2%
Water	4%	7%	9%	5%	8%	7%	6%	5%
Gas	10%	3%	6%	17%	7%	0%	6%	6%
Did not make any call	91%	86%	90%	89%	87%	89%	91%	91%

Four percent of survey respondents reported making a complaint in relation to electricity, as did 4% of those who had gas (Table 5.2.3). However, almost one in ten (9%) had made a complaint in relation to water. Analysis by sector shows that larger businesses are more likely to have made a complaint in relation to water (13%) and electricity (13%) compared with smaller businesses.

Table 5.2.3: Incidence of making a complaint by size and sector

	No of employees			Sector				Total
(Base: All respondents)	<10 (161)	10 to 49 (162)	50 or more (88)	Agriculture (74)	Manufacturing (104)	Construction (101)	Service (132)	(411) (weighted)
Electricity	3%	8%	13%	9%	9%	7%	5%	4%
Water	8%	8%	13%	9%	7%	11%	9%	9%
Gas	3%	3%	6%	17%	0%	0%	6%	4%
Did not make any call	89%	85%	78%	81%	86%	85%	87%	88%

Over one in ten gas customers (13%) had experience of pre-arranged visits by the utility company to their organisation. This compares with 4% regarding water and 9% in relation to electricity.

Larger organisations were more likely to have a pre-arranged visit with each of the utilities compared to smaller organisations (Table 5.2.4). The agriculture and manufacturing sectors were more likely to have pre-arranged visits for electricity and gas compared with other sectors.

Table 5.2.4: Incidence of utility company making a pre-arranged visit to organisations by size and sector

	No of employees			Sector				Total
(Base: All respondents)	<10 (161)	10 to 49 (162)	50 or more (88)	Agriculture (74)	Manufacturing (104)	Construction (101)	Service (132)	(411) (weighted)
Electricity	9%	13%	17%	18%	15%	9%	9%	9%
Water	4%	7%	14%	7%	8%	6%	8%	4%
Gas	7%	14%	17%	17%	19%	0%	13%	13%
Did not make any call	88%	81%	74%	80%	75%	88%	86%	88%

Perhaps not surprisingly considering the specific safety concerns associated with gas, respondents were more likely to have requested an emergency call-out for gas (12%) than for water (7%) or electricity (8%) (Table 5.2.5). Larger companies were more likely to have requested such a call-out (17% compared to 7% of small and 11% of medium companies). Those in the agriculture sector were most likely to have made an emergency call-out for each utility type than those in other sectors.

Table 5.2.5: Incidence of requesting an emergency call-out by size and sector

	No of employees			Sector				Total
(Base: All respondents)	<10 (161)	10 to 49 (162)	50 or more (88)	Agriculture (74)	Manufacturing (104)	Construction (101)	Service (132)	(411) (weighted)
Electricity	9%	3%	7%	12%	5%	4%	5%	8%
Water	7%	4%	9%	8%	4%	7%	7%	7%
Gas	7%	11%	17%	17%	11%	0%	15%	12%
Did not make any call	83%	91%	84%	80%	89%	90%	86%	84%

Reported incidences of interruption to supply were relatively low, with the highest proportion of respondents having experienced interruptions of either 12 or 24 hours to their water supply (7% and 5% respectively) (Table 5.2.6 and Table 5.2.7). Within electricity, 5% had experienced an interruption of over 12 hours but no respondents had one lasting longer than 24 hours, while 1% of gas users had experienced both a 12 hour and a 24 hour interruption to supply.

Table 5.2.6: Incidence of interruption to supply lasting more than 12 hours by size and sector

	No of employees			Sector				Total
(Base: All respondents)	<10 (161)	10 to 49 (162)	50 or more (88)	Agriculture (74)	Manufacturing (104)	Construction (101)	Service (132)	(411) (weighted)
Electricity	5%	6%	6%	7%	5%	6%	5%	5%
Water	7%	4%	0%	7%	4%	2%	5%	7%
Gas	0%	3%	0%	0%	0%	0%	2%	1%
Did not make any call	89%	90%	94%	86%	92%	92%	90%	89%

Table 5.2.7: Incidence of interruption to supply lasting more than 24 hours by size and sector

	No of employees			Sector				Total
(Base: All respondents)	<10 (161)	10 to 49 (162)	50 or more (88)	Agriculture (74)	Manufacturing (104)	Construction (101)	Service (132)	(411) (weighted)
Electricity	0%	2%	1%	0%	2%	1%	1%	0%
Water	6%	2%	0%	5%	4%	2%	3%	5%
Gas	0%	3%	0%	0%	0%	0%	2%	1%
Did not make any call	94%	95%	99%	95%	94%	97%	95%	94%

5.3 Views on generic aspects of GSS

Overview

Table 5.3.1 shows a range of generic services and the percentage of non-domestic customers who felt that each should have a guaranteed standard of service. Support for service standards was highest in relation to getting through on the telephone (91%), getting an emergency call out in a fixed amount of time (90%) and the time taken to deal with complaints (84%). Although support for GSS in relation to these aspects of service was strongest, the majority thought there should be a standard for each of the services listed.

Table 5.3.1: Which of these should have a minimum guaranteed standard of service (generic)? By size and sector

	No of employees			Sector				Total
(Base: All respondents)	<10 (161)	10 to 49 (162)	50 or more (88)	Agriculture (74)	Manufacturing (104)	Construction (101)	Service (132)	(411) (weighted)
Getting through to the company on the phone easily	91%	91%	89%	86%	91%	92%	91%	91%
Getting an emergency call out in a fixed amount of time	89%	94%	95%	85%	94%	94%	95%	90%
The time taken to deal with complaints	81%	86%	83%	77%	83%	80%	91%	84%
The time taken to deal with bill queries	81%	77%	77%	73%	74%	77%	86%	82%
Keeping appointments	79%	84%	74%	70%	77%	83%	85%	80%
The time taken to deal with queries about payment methods	75%	71%	68%	68%	68%	71%	78%	75%
The time taken to deal with meter accuracy queries	73%	75%	68%	64%	75%	71%	77%	73%
Getting a non-emergency call out in a fixed amount of time	69%	72%	72%	62%	70%	69%	77%	70%
Customer service in general	2%	2%	6%	1%	0%	3%	6%	3%
Something else not mentioned	5%	7%	8%	4%	6%	6%	9%	6%
None of the above	1%	1%	0%	1%	0%	0%	2%	1%

Respondents were asked to prioritise the GSS, which they felt was most important. Getting an emergency call out in a fixed amount of time was the highest priority (53%), followed by getting through to the company on the phone (26%).

Views on applying similar standards across the utilities

While the interviews involved asking non-domestic customers about current or proposed standards within each of the individual sectors, interviewees expressed a clear desire for standardisation of GSS, payment levels and methods of payment across all utilities.

> *"I think there should be a uniform structure... it would be easier to understand if gas, water and electricity were all the same, it would avoid confusion"*
>
> (Healthcare, East, High)

> *"It should be the same across all the utilities."*
>
> (Manufacturing, Rural, Med)

Appointments

Interviewees were asked about the current GSS for appointment keeping within all sectors. In the electricity sector in Northern Ireland, failure to keep an appointment will trigger a £25 goodwill payment. The current GSS for this area in the gas sector in England and Wales guarantees a specified two hour time slot within the morning or afternoon. The current GSS for this area in the water sector in England and Wales guarantees the two hour time slot as well as 24 hours notice if the supplier cannot make the appointment, with a goodwill payment triggered where the notice is not given.

Interviewees generally felt that the format of a standard which guarantees a specified two hour time slot, and assures customers of at least 24 hours notice where an appointment cannot be kept should be extended across all utilities.

> *"The payment doesn't come in to it. If they didn't turn up for an appointment, or arrived late, I could be away somewhere else. It's about knowing what's happening."*
>
> (Manufacturing, Rural, Med)

> *"As long as they are reasonable, and letting me know when they will come and if they can't, then that is fine. "*
>
> (Retail, South, High)

> *"Yes, and I think that should apply to the other two utilities. That notice of being unable to keep an appointment, should be, not necessarily a phone call, but even a text or an email. I don't think these companies make enough use of these technologies... Most people have mobile phones nowadays. But the utility companies don't use those technologies."*
>
> (Tourism, East, High)

> *"I would be more anxious they kept the appointment than paid me the money. If I have other appointments it could really mess up the day."*
>
> (Financial services, West, Low)

Bill/payment queries

Non-domestic customers were also asked about current GSS for bill and/or payment query resolution. The GSS, which are currently in place in Northern Ireland for the electricity sector, guarantees resolution of the query within five working days, with any due refunds payable within a maximum of a further five working days. Interviewees were unanimously satisfied with this as a standard of service in terms of timescale. However, the issue of the clarity of non-domestic utility bills in general and electricity bills in particular was raised by several interviewees across a range of sectors.

> *"Energy bills can be quite confusing, as there are different rates, and fluctuating regulators charges. Unless you worked in the industry it would be hard to understand. These regulators levies change every month, the guy explains it to me, but to be honest it goes over my head, it's unbelievable. It is nearly impossible to compare between electricity providers."*
>
> (Retail, South, High)

> *"I'd just like to see a crystal clear, plain English electricity bill. Just unit and price... The bill is too confusing; there are 3 different tariffs, it is impossible to work out how much you are paying every day."*
>
> (Manufacturing, Rural, Med)

The current GSS for bill and/or payment query resolution in the water sector in England and Wales guarantees a response to the query within ten working days. A minority felt that this timescale was too long, but most interviewees – particularly those with experience of bill queries - felt the timescale was fine as a minimum standard of service.

> *"That is fair enough by the time they check it out."*
>
> (Construction, East, Low-Med)

> *"That's fine if we know they are going to sort it out."*
>
> (Education, East, Low-Med)

> *"We have huge problems with NI Water, and they send threatening letters about water bills within one day, so why can we not get that too? I think it should be five working days."*
>
> (Agriculture, NI, Low-High)

> *"We had a big problem with them this year. They were charging us for the meter size, but it should have been the pipe size. It took weeks possibly months to get it sorted, but its sorted now. In my experience it takes longer than the GSS to get it sorted, but that time frame sounds fair enough, it's a fairly complicated thing to get sorted."*
>
> (Manufacturing, Rural, Med)

Overall, interviewees were clear about their preference for standardised timescales for generic issues across utilities.

> *"Can they not have it the same as electricity, why does it have to be so much more?"*
>
> (Agriculture, NI, Low-High)

Complaints

Interviewees were asked about GSS guaranteeing a response to complaints within ten working days. A minority felt ten working days was an acceptable timeframe.

> *"Seems reasonable."*
>
> (Education, East, Low-Med)

> *"That's fair enough."*
>
> (Construction, East, Low-Med)

The majority expressed the view that five to seven working days would be a more appropriate timescale.

"The time should be reduced, but I would like the substantive response within that time. Seven working days would be reasonable... And whenever they say 10 days for a response, they mean an acknowledgement letter, not a resolution."

(Agriculture, NI, Low-High)

"I don't understand why these agencies take so long. I would expect initial response in five days and substantive in 10."

(IT/Electronics, West, High)

Timescale for making standard payments

Interviewees were asked their view of the gas GSS (current in England and Wales) guaranteeing that any due GSS payments will be made within ten working days. Although this was acceptable to the majority of interviewees, several felt it was too long. It was also suggested that the payment timescale contrasted with the timescale afforded customers for bill payment.

"They wouldn't give you that if you owed them the money."

(Tourism, East, High)

"That should be less; I would say five working days.

(Agriculture, NI, Low-High)

The current electricity GSS guarantee also guarantees that any due goodwill payments will be made within ten working days. While not seen as a crucial aspect of the GSS, it was suggested that the timescale was a little excessive.

"Making standard payments in 10 working days… Its two weeks to the domestic user. I'd ask for clarification on that."

(Tourism, East, High)

5.4 Experience of electricity services and views on electricity GSS

Overview

The qualitative research found that supply reliability was the prime concern for all interviewees.

> *"The continuity of supply is the main issue for us – the payments might be of some value to domestic customers but is of no relevance to us."*
>
> Education, East, Low-Med

Where interruptions to supply were inevitable, communication was regarded as the single most important aspect of service. The non-domestic customers we interviewed were generally satisfied with the reliability of electricity supply they had experienced, and also with the level of customer service they received within the sector. This was despite underlying concerns around the impact of interruptions to supply on their core business. The exception to this was one interviewee from a large global firm based in the West, where a recent unplanned interruption to supply lasting several hours had impacted considerably on both production and on relationships within their supply chain.

> *"If we have a power interruption of milliseconds it can affect our process here. We had a power cut for 2 hours, and it created havoc for us. In lost revenue I wouldn't like to say – it'd be in the tens of millions... The important thing for us is about notice, and being guaranteed reliable supply. We work with NIE all the time and tell them of our requirements. They are reasonably proactive and interactive."*
>
> (IT/Electronics, West, High)

Looking at the quantitative findings (as shown in Table 5.4.1) non-domestic customers were most likely to say that there should be a minimum guaranteed standard of service for getting notice of electricity power cuts lasting longer than 4 hours (79%). Indeed 92% of large organisations (those with more than 50 employees) and 94% of those in the service sector thought that there should be a standard for this.

Just over three-quarters (76%) wanted a standard for the time taken to respond to voltage issues. This was particularly the case for those in the service (83%) and manufacturing sectors (78%).

Three-quarters (75%) also believed that there should be a standard for the time taken to replace a main fuse and 71% thought that there should be one for the time taken to get a new supply connected. A smaller proportion (58%) wanted a standard for the time taken to get a quote or estimate for a new electricity supply.

Table 5.4.1: Which of these should have a minimum guaranteed standard of service? (Electricity) by size and sector

	No of employees			Sector				Total
(Base: Electricity respondents)	<10 (161)	10 to 49 (162)	50 or more (88)	Agriculture (74)	Manufacturing (104)	Construction (101)	Service (132)	(411) (weighted)
Getting a fixed amount of notice of power cuts lasting longer than 4 hours	76%	87%	92%	70%	85%	79%	94%	79%
The time taken to get a response to problems with voltage such as flickering lights in a fixed amount of time	76%	77%	74%	69%	78%	70%	83%	76%
The time taken to get a main fuse replaced	74%	79%	74%	66%	77%	77%	80%	75%
The time taken to get a new supply connected	69%	79%	64%	64%	69%	75%	76%	71%
The time taken to get a quote or estimate for a new electricity supply	58%	65%	52%	59%	62%	53%	63%	58%
*Emergency call out	1%	0%-	1%	0%	0%	2%	1%	1%
*Time taken to deal with faults/restore service	1%	1%	1%	0%	0%	2%	1%	1%
*Length of time to get through to staff	0%	2%	5%	0%	2%	1%	3%	0%
*Bill queries	0%	2%	1%	0%	2%	2%	1%	0%
Something else	4%	4%	5%	7%	5%	2%	4%	5%
None of these	6%	4%	2%	9%	2%	5%	3%	6%

*Spontaneously mentioned by respondents

Respondents were asked which GSS they felt was most important. Getting a fixed amount of notice for power cuts lasting longer than 4 hours was the highest priority (31%), followed by the time taken to respond to voltage issues (21%).

Experience of supply interruptions

The quantitative research found that two out of five non-domestic customers had experienced an interruption to their electricity supply in the previous 12 months (Table 5.4.2). For 15% this has been a one-off occurrence, while 11% had experienced an interruption on two occasions, 5% on three occasions and 6% on more than three occasions. It is interesting to note that those in the agricultural sector, who by the nature of their business are more likely to be rurally based, were most likely to have experienced supply interruptions (58% compared with 37% overall) in the previous 12 months.

Table 5.4.2: Frequency of interruptions to electricity supply in the last 12 months by size and sector

	No of employees			Sector				Total
(Base: Electricity respondents)	<10 (161)	10 to 49 (162)	50 or more (88)	Agriculture (74)	Manufacturing (104)	Construction (101)	Service (132)	(411) (weighted)
Once	16%	16%	20%	20%	20%	13%	16%	15%
Twice	11%	15%	11%	19%	14%	16%	6%	11%
Three times	5%	6%	6%	7%	4%	7%	5%	5%
More than three times	7%	4%	10%	12%	6%	8%	3%	6%
Never	59%	57%	51%	41%	53%	55%	69%	61%
Not sure	2%	2%	1%	1%	3%	1%	2%	2%
Total	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*

None of the non-domestic customers had experienced an interruption to their electricity supply lasting longer than 24 hours (Table 5.4.3). However, 6% reported that their longest interruption was between 12 and 24 hours in duration. Over one-third reported an interruption lasting less than 4 hours (37%) and a similar proportion (39%) had one lasting between 4 and 12 hours. Large companies and those within the service sector were most likely to have experienced an interruption lasting 12 to 24 hours (12% each).

Table 5.4.3: Length of electricity interruption by size and sector

	No of employees			Sector				Total
(Base: Electricity respondents who had experienced at least one supply interruption)	<10 (66)	10 to 49 (70)	50 or more (43)	Agriculture (44)	Manufacturing (49)	Construction (45)	Service (41)	(160) (weighted)
Up to 4 hours	36%	47%	35%	32%	45%	42%	41%	37%
4 hours up to 12	41%	27%	21%	45%	31%	27%	20%	39%
More than 12, up to 24	5%	4%	12%	5%	6%	2%	12%	6%
More than 24 hours	0%	0%	0%	0%	0%	0%	0%	0%
Don't know	18%	21%	33%	18%	18%	29%	27%	19%
Total	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*

Restoration of supply

In line with the overall finding that supply reliability was the core concern for non-domestic customers, views on the current GSS of guaranteeing the restoration of supply within 24 hours, collected during the qualitative phase, showed that this was seen as an excessive amount of time for restoration in normal conditions.

> *"It depends what it is, but that seems like a long time to be out of power, certainly for non-domestic customers."*
>
> (Financial services, West, Low)

> *"I would like to see that in a shorter time frame, 24 hours is quite generous. I would say 12 hours. I understand the fault can be quite major, but they should have portable generation available to cover and get supply back on. I'm not necessarily looking for the problem to be fixed, but a step in the interim to keep things running."*
>
> (Tourism, east high)

Again, communication was seen as a key feature of service, aside from actual resolution of the problem.

> *"You have to be pragmatic about it. If the fault is huge or if there is snow on the ground people can understand. It depends very much on the circumstance. As long as something is seen to be done during that 24 hours. If it was well communicated enough then it can be coped with."*
>
> (Agriculture, NI, Low-High)

It was also suggested that a system of prioritisation might ensure those most in need of supply are affected for the shortest time.

> *"They should maybe prioritise things, for types of buildings. For example, a hospital and a car sales garage should be treated very differently. There is a rank. 24 hours for car sales might be ok; it wouldn't be if it hadn't been resolved in a hospital environment, because after the generators pack in, that's it."*
>
> (Healthcare, East, High)

Within the survey, non-domestic customers were presented with the information that a payment of £125 is currently due where electricity is not restored within 24 hours, with further payments of £25 for each additional 12 hours without supply. While over half (56%) thought that this payment level was about right, 10% thought it should be a little more and over one-quarter (28%) believed it should be a lot more (Table 5.4.5). Six percent commented that the level of payment was too much. Medium (46%) and larger (68%) size businesses and those in the manufacturing sector (56%) were more likely to think that the payment level should be a lot more.

Table 5.4.5: Opinions about the payment of £125 where electricity is not restored within 24 hours; with further payments of £25 for each additional 12 hours without supply (in normal conditions) by size and sector

	No of employees			Sector				Total
(Base: Electricity respondents)	<10 (161)	10 to 49 (162)	50 or more (88)	Agriculture (74)	Manufacturing (104)	Construction (101)	Service (132)	(411) (weighted)
Far too much	5%	1%	0%	1%	4%	3%	2%	3%
A little too much	2%	2%	0%	4%	0%	1%	2%	3%
About right	58%	41%	31%	57%	32%	47%	48%	56%
It should be a little more	11%	10%	1%	9%	9%	9%	7%	10%
It should be a lot more	24%	46%	68%	28%	56%	41%	41%	28%
Total	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*

Notice of planned supply interruptions

As discussed previously, the quantitative research found that 79% of non-domestic customers felt there should be a standard for fixed notice of power cuts lasting longer than 4 hours. However, the qualitative research found there were mixed opinions about the acceptability of the current GSS relating to a minimum of three days notice of planned interruptions to supply. The interviewee representing the agriculture sector felt the amount of notice was satisfactory, although it did not reflect experience in that sector.

> *"That's perfect, it doesn't happen, but it's perfect. Three days would be perfect notice."*
>
> (Agriculture, NI, Low-High)

Those in other business sectors felt it was a little short, but acceptable, while interviewees from the public sector (both education and healthcare) felt that a notice period of one week would go much further to meeting their operational needs, and that such a short notice period could have consequences for their service users.

> *"Yes I mean its fine. I would prefer up to a week if possible, but I appreciate they normally do give a week's notice. But that's a minimum. - three days would certainly allow us to take whatever corrective action we would need to recover from it."*
>
> (Tourism, East, High)

> *"There are the implications for parents who will have to organise childcare or take time off work. Our school canteen also supplies school meals for the smaller rural schools around the area and there would be a knock on affect there. Ideally I would need at least a week."*
>
> (Education, East, Low-Med)

> *"For the like of us, there should be more than that. Again it should maybe be down to the type of building. Three days isn't enough time for a large acute hospital site to do all the necessary planning. It's more the difficulties associated with communication. We have to make our plans and then communicate them to our 22,000 staff. Five working days would be more appropriate."*
>
> (Healthcare, East, High)

Voltage complaints

We also asked qualitative interviewees about the GSS relating to voltage complaints (seven working days to make an appointment or five working days to provide an explanation if a visit is not required). Again, this was found to be a priority for the implementation of a minimum standard within the quantitative research. While voltage was not a problem which many qualitative interviewees had experience of, the timescale was felt to be longer than acceptable.

> *"It seems a long time. We need everything working in our trade. You would like to think they could do something faster than seven days."*
>
> (Financial services, West, Low)

Alongside the timescale, it was suggested that a prioritisation of customers affected by the issue might be an appropriate determinant of timescale.

> *"The seven working days in a bit strange, maybe keep it within a week so that people are always getting a response within a week. Maybe keep it five [working days for a visit] and 5 [working days for an explanation]. There should be something in there to prioritise customers. "*
>
> (Healthcare, East, High)

For the one interviewee who had extensive experience of this fault, it was felt that the standard did not go far enough in terms of assuring customers of a resolution to the issue.

> *"That is a huge problem for us. That's fair enough; it doesn't sort the problem out though".*
>
> (Agriculture, NI, Low-High)

Main fuse replacement

Qualitative interviewees were asked about the GSS guaranteeing replacement of a main fuse within 3 hours during a working day and 4 hours on any other day. The standard lacked relevance for the larger organisations that have their own maintenance teams. For interviewees from smaller organisations, this was regarded as an acceptable level of service, but the level of payment was regarded as too small to be significant.

> *"The £25 not much use to me. If I'm down electricity for two or three hours, depending on the time of day, I will have to consider closing down the school."*
>
> (Education, East, Low-Med)

Quotations and connections

Qualitative interviewees were asked about current GSS for providing quotations for a new supply (seven working days for small jobs and 15 working days for large jobs). While the timescales were felt to be quite long, it was acknowledged that this presented no problems for non-domestic customers, as these timescales generally fitted into a longer planning period.

> *"The 15 working days is pushing the boat out. I would say something between 4 and 7 working days would be more appropriate."*
>
> (Manufacturing, Rural, Med)

> *"That doesn't seem too bad... you're probably working much in advance for getting your costing together."*
>
> (Financial services, West, Low)

The current GSS for connecting a new supply (four working days for non-domestic connections) was seen as more than acceptable, but did not reflect the experience of several interviewees we spoke to from smaller organisations with low electricity usage.

> *"That seems very quick."*
>
> (Financial services, West, Low)

> *"That is not the case. I don't think that's right. I think you're talking about weeks. Getting a new supply is the main issue, and that takes about six or seven weeks."*
>
> (Construction, East, Low-Med)

Meter reading and accuracy issues

Qualitative interviewees were asked about the GSS for meter accuracy queries (seven working days to make an appointment or five working days to provide an explanation if a visit is not required). Some interviewees from the larger organisations felt that the timescale was a little excessive due to stretching beyond one working week, while those from small and medium organisations generally felt it was an acceptable timeframe.

> *"I find the seven working days strange. If they are both sorted within five days it would be better."*
>
> (Healthcare, East, High)

> *"The timescale is probably a bit high; again it could probably go down to about three days."*
>
> (Retail, South, High)

> *"The timeframe here would be fine if they kept to it. "*
>
> (Manufacturing, Rural, Med)

Several of the interviewees from the larger organisations with the higher electricity usage revealed that they had experienced problems with the accuracy or the timeliness of meter readings.

> *"Nobody has been out to look at the meter in about 3 years, but I'm happy enough with the accuracy in general."*
>
> (Manufacturing, Rural, Med)

Meter accessibility and billing issues

Accessibility of meters and meter read outs was also viewed as problematic for both medium and large companies. This view was expressed regarding a number of different electricity suppliers, and was seen as both a problem in terms of consequential estimated billing, and as a barrier to effective energy efficiency management.

> *"We've had problems with one of the suppliers, who don't do readings; they just do estimates, so we have got rid of them now. They always estimated on the high side, so you pay them a ton of money, and then they have to refund it, which isn't ideal. Online metering and accurate bills seem to be the way forward."*
>
> (Retail, South, High)

> *"They won't take responsibility for telling us the quantities and cost of our electricity. Our bill is £1 million a month, we need to know what that cost is, and NIE don't facilitate our energy management in any way, they could go further. "*
>
> (IT/Electronics, West, High)

One interviewee suggested that the GSS should contain a clause about equal access to meters for both supplier and customer.

> *"There should be something in there about their meter. We should have equal access to it; the principal of the customer being entitled to the real time information of the meter should be somewhere. It's a barrier to energy efficiency, and why should we not have access to the meter they are charging us for? Especially with the focus on*

energy efficiency there is now. This is where we can drive it from. There should be something in there to ensure they are fitting meters that can be read remotely, but that fit our business needs and have consumption figures. It is something I would definitely like to see recognised."

(Healthcare, East, High)

Exemptions

All interviewees in the qualitative phase were happy to accept that certain circumstances should lead to GSS being waived. Extreme weather, industrial action and 'Acts of God' were all thought to be acceptable exemptions. However, interviewees expressed the view that there should be scrutiny of the circumstances when exemptions are claimed by utility companies and that there should be a clear distinction between normal and extreme weather conditions, particularly with reference to the need for continual maintenance.

"That's fair enough. Safety should come first. But it's being creative with when these conditions become unsurpassable. People often use safety as an excuse generally. I wouldn't use it as a 'get-out clause'."

(Healthcare, East, High)

"A lot of this could be prevented by proper maintenance. You can have lines down in high winds; that's a fact of life. If there was more maintenance, then that could be sorted quickly, and wouldn't happen as often as it does. There should be some common sense."

(Manufacturing, Rural, Med)

Other issues

The non-domestic customers we spoke to during the qualitative phase raised several other issues as areas of concern in relation to electricity supply and standards of service within the sector. Within the qualitative research most comments related to the desire for better communication between electricity suppliers and non-domestic customers.

"Plenty of communication would be the biggest thing."

*(*Agriculture, NI, Low-High)

Communication was seen as a crucial part of being able to manage supply issues within the customer's business sector.

"When you centralise everything, you don't get directly to the problem. You want to know how long the power is going to be off. From a commercial point of view, we have customers sitting there... When a utility provider fails, our customers suffer directly, and we must do the best we can. There is no point in us blaming the electricity company to the customers. We have to manage the situation. Better communications, some sort of clearer indication of time frames will facilitate us in dealing with our customers."

(Tourism, East, High)

It was also suggested that utility companies are not making best use of widely available communication technologies.

"A clearly visible line of communication, not an answering service. I think with the technology available around, they should be able to have a process that gets you to your area. You need to be talking to the engineer out on the ground who is dealing with it. Invariably that engineer has a mobile phone. An area office, where people

who are involved in dealing with the problem have some knowledge would be useful."

(Tourism, East, High)

Within the agriculture and construction sectors in particular, responsiveness was viewed as key to ensuring the safety of workers who may attempt to resolve matters themselves due to concern about losing time, productivity or money waiting for an electricity company to respond to an issue.

"If someone is waiting on someone checking a fault, and can't get into the field, or is scared to go into the field in case they damage something, then that is unacceptable. If there was a saggy line, and a farmer pulled it down with a combine harvester, they would be responsible for the cost. Response to faults is very important."

(Agriculture, NI, Low-High)

"They haven't put anything in about hitting cables, and knocking out supplies. Say we knock down a cable, they will charge us three times the cost of fixing it. They should respond within two to three hours, if they respond to these other things within two to three hours, and then the cost wouldn't be so high, therefore avoiding overtime rates."

(Construction, East, Low-Med)

Finally, consternation about current tariffs was expressed by medium and high users of electricity. While the impact of high tariffs on global competitiveness was viewed as the prime concern for the larger and more technology based interviewee, one interviewee from a medium-sized firm felt that not being able to understand why tariffs remained high, or not being able to access an explanation for such high tariffs, was his main source of dissatisfaction.

"None of them touch the main issue, and that is the price. Nobody has come up with an explanation as to why bills have gone up. Why are our prices rising now, when oil prices are going down? Why aren't we seeing a drop if the price of utilities have dropped. Communication is key, nobody will tell me why this is the case.''

(Manufacturing, Rural, Med)

"One of the big complaints is the high cost of utilities compared to the rest of the UK, especially electricity... We are a global company, and we are competing with them for business, and our electricity costs are driving our prices sky high."

(IT/Electronics, West, High)

These concerns about tariffs were mirrored in the non-domestic survey findings, with high costs coming out as the single most common response (6% and the highest proportion raising this as an issue across the three utilities) (Table 5.4.6). Similarly, poor communication between utility companies and their non-domestic customers was a concern for a small proportion of respondents (1%). The remaining responses (6%) were split across a wide range of concerns, but it is interesting to note that unlike qualitative interviewees, survey respondents were not as concerned about competitiveness although this was more of an issue for those in the service and manufacturing sectors (2% and 1% respectively) and those in smaller companies than for others.

Table 5.4.6: Other comments about standards of service (electricity) by size and sector

	No of employees			Sector				Total
(Base: Electricity respondents)	<10 (161)	10 to 49 (162)	50 or more (88)	Agriculture (74)	Manufacturing (104)	Construction (101)	Service (132)	(411) (weighted)
Costs too high/expensive	6%	3%	3%	8%	2%	2%	6%	6%
Happy/satisfied	3%	1%	1%	3%	3%	0%	2%	3%
GSS are a good idea	1%	0%	0%	0%	0%	1%	1%	1%
Lack of/poor communication with customers	1%	1%	1%	1%	1%	1%	1%	1%
Concerns over competitiveness/monopoly situation	0%	1%	1%	0%	1%	0%	2%	0%
Other	6%	5%	11%	14%	5%	5%	5%	6%
No other comments	83%	90%	82%	74%	88%	91%	84%	83%

5.5 Experience of gas services and views on gas GSS

Overview

Qualitative interviewees' experiences as gas customers were overwhelmingly positive, with no significant service issues mentioned. During this phase of the research, current GSS from the gas sector in England and Wales were used to stimulate discussion around desired standards for Northern Ireland.

In line with qualitative findings on the electricity sector, reliability of supply and effective communication with customers were seen as the crucial elements of quality service provision.

> *"In our experience, the gas infrastructure has been unproblematic."*
>
> (Tourism, East, High)

Within the quantitative research, approximately one in ten respondents (9%) felt that none of the aspects of service asked about merited a standard (Table 5.5.1). The majority of survey respondents felt that minimum standards of service should be implemented in relation to guaranteeing a fixed amount of notice when supply is to be cut off for more than four hours (80%). This was of particular importance to those in the service sector (87%) and those in larger companies (89%).

A large proportion also felt that a minimum standard should be implemented in relation to having fixed period for the reinstatement of the premises (78%). Again this was of most importance to those in the service sector (83%) and those in larger companies (19%).

Table 5.5.1: Which of these should have a minimum guaranteed standard of service? (Gas) by size and sector

	No of employees			Sector				Total
(Base: Gas respondents)	<10 (29)	10 to 49 (35)	50 or more (36)	Agriculture (6)	Manufacturing (27)	Construction (13)	Service (54)	(100) (unweighted)
Getting a fixed amount of notice if gas will be cut off for more than 4 hours	69%	80%	89%	67%	74%	69%	87%	80%
Being able to get back into your property within a fixed amount of time after work on the gas supply	76%	77%	81%	67%	74%	69%	83%	78%
Something else	7%	3%	8%	0%	11%	0%	6%	6%
None of these	17%	9%	3%	33%	7%	15%	6%	9%

Respondents were asked which of the GSS they felt was most important. Getting a fixed amount of notice for supply interruptions lasting longer than 4 hours was the highest priority (48%).

Experience of supply interruptions

The survey showed that interruptions to gas supply were a rare occurrence, with 97% of respondents never having experienced one, and the highest incidence (4%) found in the manufacturing sector (Table 5.5.2).

Table 5.5.2: Frequency of interruptions to gas supply in the last 12 months by size and sector

	No of employees			Sector				Total
(Base: Gas respondents)	<10 (29)	10 to 49 (35)	50 or more (36)	Agriculture (6)	Manufacturing (27)	Construction (13)	Service (54)	(100) (unweighted)
Once	0%	3%	3%	0%	4%	0%	2%	2%
Twice	0%	0%	0%	0%	0%	0%	0%	0%
Three times	0%	0%	0%	0%	0%	0%	0%	0%
More than three times	0%	0%	0%	0%	0%	0%	0%	0%
Never	100%	97%	94%	100%	96%	100%	96%	97%
Not sure	0%	0%	3%	0%	0%	0%	2%	1%
Total	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*

Of the very small number who had experienced an interruption (3 respondents), most (2 respondents) were less than four hours long. These findings reflect the positive experiences evidenced in the qualitative research.

Restoration of supply

Qualitative interviewees were asked about the GSS guaranteeing restoration of gas supply within 24 hours in the event of a supply interruption. This standard was felt to be appropriate for the gas sector, but for the interviewee representing the healthcare sector, prioritisation was a continuing concern.

> *"Gas has major health and safety issues around it; 24 hours is probably not unreasonable, given that a burst gas pipe is a huge safety issue."*
>
> (Tourism, East, High)

> *"There should be some prioritisation of the type of sites. Health or social care sites should always come first."*
>
> (Healthcare, East, High)

> *"If it's a big problem we can understand 24 hours, but as long as something is being done."*
>
> (Agriculture, NI, Low-High)

Survey respondents were asked about the appropriateness of current payment levels (Table 5.5.3). The majority (55%) felt that a goodwill payment of £50 for 24 hours without gas and an additional £50 for each further 24 hour period without supply was insufficient. Two out of five respondents (41%) felt these amounts were sufficient, while a small minority (3%) felt they were excessive.

Table 5.5.3: Opinions about the payment of £50 where gas is not restored within 24 hours; with further payments of £50 for each additional 24 hours without supply (in normal conditions) by size and sector

	No of employees			Sector				Total
(Base: Gas respondents)	<10 (29)	10 to 49 (35)	50 or more (36)	Agriculture (6)	Manufacturing (27)	Construction (13)	Service (54)	(100) (unweighted)
Far too much	0%	3%	0%	0%	0%	0%	2%	1%
A little too much	3%	0%	0%	0%	4%	0%	0%	2%
About right	41%	43%	19%	83%	33%	38%	28%	34%
It should be a little more	10%	14%	6%	0%	7%	31%	7%	10%
It should be a lot more	45%	40%	75%	17%	56%	31%	63%	54%
Total	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*

Notice of interruptions

Qualitative interviewees were asked their view of the gas GSS (current in England and Wales) guaranteeing customers at least five working days notice in the event of a planned supply interruption. All interviewees were satisfied that this level of notice would fit their needs. It should be noted that four out of five survey respondents (80%) felt that there should be a GSS for providing fixed notice of supply interruptions, the highest proportion for any aspect of gas services.

Meter reading and accuracy issues

No qualitative interviewees had experienced any gas meter accuracy problems, and most felt that the suggested GSS of providing a written explanation within five working days or offering to visit within seven working days was acceptable as a minimum standard. Two of the interviewees representing larger organisations with higher usage felt that both aspects of the standard should be achievable within five working days.

> *"Again, I think it would be good to standardise it. I think if you have any issue, if someone can't come back to you within a week, then there is a problem. So five working days would be fine. "*
>
> (Tourism, East, High)

Exemptions

In line with findings for the electricity sector, all interviewees were satisfied that circumstances such as extreme weather, industrial action and 'Acts of God' should exempt gas companies from the GSS discussed. Again, interviewees expressed concern that such exemptions should be scrutinised to ensure fairness, but the overriding concern expressed was for the safety of the public generally and gas company workers specifically.

Reinstatement of premises

The GSS relating to the reinstatement of premises after work on the gas supply (reinstatement within five working days of work completion) elicited a mixture of views in the qualitative phase. While a few felt the timescale was acceptable, most felt that a period of two to three working days would be more appropriate.

> *"I think that is all right."*
>
> (Construction, East, Low-Med)

> *"Why is it so long? It seems very long."*
>
> (IT/Electronics, West, High)

It is worth noting that over three-quarters (78%) of survey respondents felt there should be a minimum standard for this aspect of service.

Other issues

The majority of survey respondents (85%) had no other comments to make. A small proportion (4%) took the opportunity to comment that they were satisfied overall with their experience as a non-domestic gas consumer (Table 5.5.4). A minority (2%) felt that gas was unnecessarily expensive (this compares to 3% of respondents in relation to water and 6% in relation to electricity).

Table 5.5.4: Other comments about standards of service (gas) by size and sector

	No of employees			Sector				Total
(Base: Gas respondents)	<10 (29)	10 to 49 (35)	50 or more (36)	Agriculture (6)	Manufacturing (27)	Construction (13)	Service (54)	(100) (unweighted)
No other comments	79%	86%	89%	83%	85%	92%	83%	85%
Happy/satisfied	3%	3%	6%	0%	7%	0%	4%	4%
Expensive/costly	0%	6%	0%	0%	4%	0%	2%	2%
Other	17%	6%	6%	17%	4%	8%	11%	9%

5.6 Experience of water services and views on water GSS

Overview

In contrast to the mostly positive experiences of non-domestic customers in the electricity sector, and the overwhelmingly positive experiences suggested by those in the gas sector, the water and sewerage sector was viewed as much more problematic.

Qualitative interviewees expressed dissatisfaction with several aspects of water and sewerage services, including difficulties contacting the supplier, a lack of responsiveness once contact had been achieved, and a lack of customer focus, particularly in comparison to the electricity and gas sectors.

> *"I've never been able to get in touch with NI Water regarding a number of issues. Communication is a problem."*
>
> (Financial services, West, Low)

> *"NIE work with you a bit better. We have a fairly good relationship with NIE. NI Water's customer service is atrocious, especially for business customers. The working relationship and customer service and feeling like you're getting answers is important. NI Water, they don't even own their call centres. There are no local liaison officers now, who could explain it, even if it wasn't what we wanted to hear."*
>
> (Agriculture, NI, Low-High)

> *"The water is shocking; it's a nightmare, especially getting new connections. The water board is the worst. The timescale is really poor at the minute with the water board. The water pressure here is woeful. If someone flushed the toilet while you were in the shower it would filter out."*
>
> (Construction, East, Low-Med)

Current GSS from the water and sewerage sector in England and Wales were used as the basis of discussion around desired standards for Northern Ireland. Due to the difficulties non-domestic customers had with water and sewerage services, interviewees were particularly keen to see guaranteed standards of service implemented in this sector.

> *"They certainly aren't as customer focused as NIE. It is sometimes a bit ad hoc when they tell us about interruptions. These standards should be introduced."*
>
> IT/Electronics, West, High

Views on GSS

Table 5.6.1 shows from the qualitative survey, non-domestic customers' views on which aspects of water services should have guaranteed standards. Equal percentages (84%) thought that there should be standards in relation to the notice given for planned interruptions and for the quality of drinking water. Over three-quarters (79%) wanted a standard in relation to restoring supply within a stated time. This was particularly the case for larger employers (82%) and those in the manufacturing and service sectors (86% and 87% respectively).

Just under three-quarters (73%) felt there should be a standard for internal flooding, and a similar proportion (71%) thought a standard should be applied to external flooding. Sixty-five percent believed that there should be a standard for low water pressure.

Table 5.6.1: Which of these should have a minimum guaranteed standard of service? (Water) by size and sector

	No of employees			Sector				Total
(Base: Water respondents)	<10 (161)	10 to 49 (162)	50 or more (88)	Agriculture (74)	Manufacturing (104)	Construction (101)	Service (132)	(411) (weighted)
Getting a fixed amount of notice if water will be cut off for more than 4 hours	83%	83%	83%	72%	87%	79%	89%	84%
Guaranteeing the quality of drinking water	84%	84%	76%	74%	82%	84%	86%	84%
Restoring supply within the time stated	77%	81%	82%	59%	86%	78%	87%	79%
Internal flooding from sewers	71%	77%	72%	50%	72%	78%	83%	73%
External flooding from sewers	68%	76%	69%	47%	73%	75%	81%	71%
Low water pressure (from cold tap, not hot boiler)	64%	63%	66%	55%	66%	59%	70%	65%
*Customer service/phone service	1%	0%	5%	1%	0%	2%	2%	1%
*Emergency call outs	1%	0%	0%	0%	0%	2%	0%	1%
*Price/competitiveness	1%	1%	1%	1%	2%	0%	1%	1%
*Accounts/billing	0%	0%	2%	0%	1%	0%	1%	0%
*Notification of service interruption	0%	1%	0%	0%	0%	2%	0%	0%
Something else I haven't mentioned	2%	1%	6%	4%	1%	3%	3%	3%
None of these	7%	9%	5%	18%	5%	6%	4%	7%

*Spontaneously mentioned by respondents

Respondents were asked which of the GSS they felt was most important. Guaranteeing the quality of drinking water was the highest priority (30%), followed by getting a fixed amount of notice for supply interruptions of longer than 4 hours (22%).

Experience of supply interruptions

The majority (82%) of non-domestic customers had no experience of an interruption to their water supply in the previous 12 months (Table 5.6.2). One in ten (11%) had experienced a single interruption, while 2% had experienced two interruptions, 2% had experienced three and 2% had experienced four or more in this period of time. Those in the agriculture sector were most likely to have experienced a supply interruption (24% having experienced one or more interruptions).

Table 5.6.2: Frequency of interruptions to water supply in the last 12 months by size and sector

	No of employees			Sector				Total
(Base: Water respondents)	<10 (161)	10 to 49 (162)	50 or more (88)	Agriculture (74)	Manufacturing (104)	Construction (101)	Service (132)	(411) (weighted)
Once	11%	4%	9%	14%	7%	5%	8%	10%
Twice	2%	4%	1%	3%	3%	0%	4%	2%
Three times	2%	1%	2%	4%	0%	1%	2%	2%
More than three times	2%	1%	1%	4%	1%	1%	2%	2%
Never	81%	88%	84%	73%	89%	89%	83%	82%
Not sure	2%	2%	2%	3%	0%	4%	2%	2%
Total	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*

Notice of planned interruptions to supply

Within the qualitative research, interviewees were asked about the GSS guaranteeing at least 48 hours notice of the start and end time of any planned interruption to supply lasting more than four hours. Responses to this standard were mixed. Approximately half of respondents, including those within the tourism and agriculture sectors, felt that 48 hours was acceptable as a minimum standard.

> *"That standard is reasonable enough. I'd be in favour of that definitely."*
>
> (IT/Electronics, West, High)

For those in the healthcare, education, construction and retail sectors however, the standard was not regarded as meeting their operational needs. A timescale of five working days or one week was seen as more appropriate.

> *"I think on the acute sites, we would have about 8 hours tank water required for places, but if it goes outside of that we'd have to look at other alternatives. So 48 hours notice wouldn't be enough for a large organisation like ourselves. I would think at least five working days in advance if possible."*
>
> (Healthcare, East, High)

> *"I'd appreciate more notice, it could really have major implications. No running water or flushing toilets becomes a health and safety issue. 48 hours is totally inadequate – I'd really need a week."*
>
> (Education, East, Low-Med)

> *"A week's notice would be adequate to give you time to prepare."*
>
> (Construction, East, Low-Med)

> *"You could probably do with 7 days notice for a planned interruption."*
>
> *(Retail, South, High)*

We also asked qualitative interviewees about the GSS guaranteeing that in the event of an unplanned interruption to supply lasting more than four hours, reasonable steps would be taken to:

- Notify customers of the interruption;
- Provide information on sources of alternative water supply;
- Inform customers about the likely time of restoration; and
- Provide a contact number for further information.

While the majority felt that such measures were an acceptable minimum standard of service, there were concerns about tightening the definition of what would be seen as 'reasonable'.

> *"One person's reasonable may not be another's. There should maybe be more of a description of what those reasonable steps are."*
>
> (Healthcare, East, High)

Survey respondents were provided with the information that in England and Wales, the payment due to a non-domestic customer if water is not restored within 12 hours for a regular main and 48 hours for a strategic main is £50, with a further £25 due after each additional 24 hours. Just over half (53%) felt that this level of payment was about right, with 43% saying it should be more and 3% believing it was too much (Table 5.6.3). Larger employers (71%) and those in the manufacturing sector (56%) were most likely to think that the payment should be more.

Table 5.6.3: Opinions about the payment of £50 where water is not restored within 12 hours for a regular main and 48 hours for a strategic main; with further payments of £25 for each additional 24 hours without supply (in normal conditions) by size and sector

	No of employees			Sector				Total
(Base: Water respondents)	<10 (161)	10 to 49 (162)	50 or more (88)	Agriculture (74)	Manufacturing (104)	Construction (101)	Service (132)	(411) (weighted)
Far too much	2%	1%	0%	1%	1%	1%	1%	1%
A little too much	2%	1%	0%	4%	1%	1%	1%	2%
About right	54%	48%	28%	47%	41%	45%	50%	53%
It should be a little more	14%	12%	3%	14%	13%	10%	8%	13%
It should be a lot more	28%	39%	68%	34%	43%	44%	41%	30%
Total	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*

Inadequate pressure

Over one in ten non-domestic customers (12%) reported that they had an on-going issue with low water pressure (Table 5.6.4). Smaller companies and those in the agriculture sector were most likely to have experienced such problems (12% each).

Table 5.6.4: Incidence of having an on-going issue with low water pressure by size and sector

	No of employees			Sector				Total
(Base: Water respondents)	<10 (161)	10 to 49 (162)	50 or more (88)	Agriculture (74)	Manufacturing (104)	Construction (101)	Service (132)	(411) (weighted)
Yes	12%	7%	10%	12%	7%	10%	10%	12%
No	88%	93%	90%	88%	93%	90%	90%	88%
Total	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*

Within the qualitative research, interviewees were asked their opinion on the GSS guaranteeing that two occasions of inadequate pressure lasting longer than one hour within a 28 day period will trigger a goodwill payment. Approximately half of the non-domestic customers we spoke to suggested that they were happy with this standard, but acknowledged that they had no experience of pressure problems to draw on. Within this group, it was also suggested that customers, whether domestic or non-domestic would not readily know what the minimum pressure standard was, or how to assess their own water pressure in light of this minimum.

> *"Give people a meaningful measure."*
>
> (IT/Electronics, West, High)

Those who had experience of water pressure problems expressed doubts about the practicality of a GSS on this issue, and it was recognised that the standard did not guarantee a resolution to the problem.

> *"We have a premise in Newtownards that has low water pressure, but Newtownards has low water pressure. They aren't willing to do anything about it, because they won't put the pressure in, because they know the system can't cope with it. I'm sceptical about how this would be implemented in existing low water pressure areas."*
>
> (Tourism, East, High)

> *"I think that's rather ineffective as a standard. The £25 isn't going to help us with the water pressure."*
>
> (Healthcare, East, High)

Finally, it was suggested that low water pressure can be less problematic than excessive water pressure, and that the latter is not reflected in the GSS under discussion.

> *"People have had problems with too high a pressure, and having burst pipes. As long as they have water they can still operate. If it causes a difference to their business, then £25 isn't enough."*
>
> (Agriculture, NI, Low-High)

Internal flooding from sewers

The survey findings suggest that internal flooding from sewers is not generally a problem for consumers, with a small minority of respondents (2%) having experience of such an incident. Despite this, it is worth noting that seven out of ten respondents (73%) felt it was important to have a minimum standard for this aspect of service (Table 5.6.5).

Table 5.6.5: Incidence of flooding of sewage inside premises by size and sector

	No of employees			Sector				Total
(Base: Water respondents)	<10 (161)	10 to 49 (162)	50 or more (88)	Agriculture (74)	Manufacturing (104)	Construction (101)	Service (132)	(411) (weighted)
Yes	2%	2%	3%	1%	4%	2%	2%	2%
No	98%	98%	97%	99%	96%	98%	98%	98%
Total	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*

During the qualitative phase, interviewees were asked about the GSS guaranteeing that incidences of internal flooding from sewers will trigger a payment equal to customers' annual sewerage charges (£150-£1,000).

While none of the non-domestic customers interviewed had experienced an episode of this nature, resolving ongoing service issues rather than paying individual GSS payments was the central concern expressed.

> *"I can see where they're coming from. They're not based on any factual measurement. I think it's inadequate, because I don't think that is the sort of payout that would invigorate the company to improve the situation. Again, call me sceptical, but flooding and sewage problems tend to be consistently in the same places. It is more important to resolve that."*
>
> (Tourism, East, High)

There was also concern that the standard did not provide a clean-up service as part of the minimum.

> *"A clean-up should be included as part of the standard."*
>
> (Manufacturing, Rural, Med)

External flooding from sewers

The survey found a higher incidence of external flooding (6% compared to 2% internal). Again, while this indicates that the majority of consumers are unaffected by such incidences, it is worth noting that a large proportion (71%) felt that a minimum standard for this aspect of service should be implemented (Table 5.6.6). Smaller companies (6%) and those in the manufacturing and service sectors were most likely to have experienced external flooding (5% in each sector).

Table 5.6.6: Incidence of flooding of sewage on property but outside premises by size and sector

	No of employees			Sector				Total
(Base: Water respondents)	<10 (161)	10 to 49 (162)	50 or more (88)	Agriculture (74)	Manufacturing (104)	Construction (101)	Service (132)	(411) (weighted)
Yes	6%	2%	3%	4%	5%	3%	5%	6%
No	94%	98%	97%	96%	95%	97%	95%	94%
Total	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*

Qualitative interviewees were asked about the GSS guaranteeing that incidences of external flooding from sewers will trigger a payment equal to half of customers' annual sewerage charges (£75-£500).

Feedback on the issue of external flooding due to sewer problems was similar to that expressed on the issue of internal flooding, with resolution of underlying problems considered a greater service priority than goodwill payments to customers.

> *"I would rather get the problem sorted ASAP. If someone could sort the problem within a few hours with no payment due, that would be much better than it getting a payment and the problem going on for days."*
>
> (Education, East, Low-Med)

The nature of the payment structure was also felt to be inappropriate for Northern Ireland, however, sewerage issues were considered significant within the agriculture sector.

> *"Most customers that are land owners aren't going to have sewage charges, but it is a huge problem for them. The sewage system is not robust enough to cope with heavy rain."*
>
> (Agriculture, NI, Low-High)

Exemptions

In line with findings for both the electricity and gas sectors, all interviewees were satisfied that circumstances such as extreme weather, industrial action and 'Acts of God' should exempt water companies from the GSS discussed. Also in line with those findings, concern was expressed that a mechanism to ensure the equity of applying such exemptions should be implemented.

> *"I don't think NI Water can blame the weather for every water problem."*
>
> (Tourism, East, High)

A central concern that exemptions should not be applied where adequate maintenance work would have prevented the issue from transgressing agreed standards of service.

Other issues

Non-domestic consumers we spoke to in the qualitative phase expressed a number of concerns around water meters, a topic not covered by the current GSS in place in England and Wales, and one raised spontaneously by those we interviewed.

There were a number of concerns around the frequency of meter readings, and the consequential billing of estimated consumption figures (as opposed to actual consumption figures).

> *"I don't see why water utility shouldn't have monthly meter readings. Every six months is ridiculous."*
>
> (Tourism, East, High)

> *"They say they don't have the resources to read it, and that's why it's an estimated read."*
>
> (Healthcare, East, High)

> *"Hopeless, the accuracy and what the bills relate to, and what meters they relate to, are big problems that keep occurring. We have approached NI Water about that many times."*
>
> (IT/Electronics, West, High)

A corollary of this issue was that of who owns – and has access to – the water meter. One high consumption non-domestic customer suggested that implementing water efficiency policies was hampered by a lack of access to water meters, in conjunction with a lack of clear consumption data in the billing system.

> *"The other main issue we are dealing with at the moment is the old school thinking that the meters belong to the utilities themselves... It should be a customer's meter too. It's a consumption meter to us, not just a fiscal meter to them... For instance, our quarterly bill says 2000 units used, and we don't know how they were used. It's very important to us to get good quality data... rather than an estimated bill."*
>
> (Healthcare, East, High)

> *"The meter means nothing to the user, in the way the petrol pump or scales in supermarkets. They give you a price and a quantity. With the water meter, then you get a funny piece of paper that nobody understands"*
>
> (Tourism, East, High)

Problems in the area of estimated billing were felt to be exacerbated by difficulties communicating or getting a response from the water company.

> "*I'm having problems with accuracy, and correspondence. I have a problem with a bill, and they won't call me back. They expect you just to pay everything they send you, and they send you loads of bills."*
>
> (Retail, South, High)

> *"A local response rather than a call centre would be welcome."*
>
> (Manufacturing, Rural, Med)

When provided with an opportunity to make any other comments within the quantitative survey, a small proportion (3%) suggested they have problems with bills. This may relate to the issues around infrequent meter reading and consequential estimated billing referred to in the qualitative research.

Water services were seen as excessively costly by a further 3% of respondents (Table 5.6.7). Poor telephone services and slow response times were each seen as issues by 2% of respondents, again reflecting the qualitative finding that interviewees had experienced difficulties with communication and responsiveness.

Table 5.6.7: Other comments about standards of service (water) by size and sector

	No of employees			Sector				Total
(Base: Water respondents)	<10 (161)	10 to 49 (162)	50 or more (88)	Agriculture (74)	Manufacturing (104)	Construction (101)	Service (132)	(411) (weighted)
Bill problems	2%	1%	6%	4%	1%	2%	4%	3%
Costs too high/expensive	3%	2%	2%	4%	2%	1%	3%	3%
Happy/satisfied	3%	1%	2%	1%	2%	0%	4%	3%
Poor telephone service	2%	1%	1%	1%	0%	1%	2%	2%
Slow response time/slow to resolve issues	3%	1%	3%	4%	1%	3%	2%	2%
Other	8%	5%	6%	11%	6%	7%	4%	7%
No other comments	80%	90%	82%	77%	88%	87%	83%	80%

6. Key findings: views of utility companies

The programme of research incorporated unstructured qualitative interviews with utility companies on their views of current and proposed GSS from an industry perspective. Interviews were held with representatives from firmus energy, Phoenix Supply Limited (PSL), Phoenix Natural Gas (PNG), NI Water and NIE between December 2009 and February 2010.

6.1 Phoenix

Representatives from Phoenix Supply Ltd. (PSL) and Phoenix Natural Gas Ltd. (PNG) stated that they endeavour to meet the standards of performance that they have committed to, but indicated that the introduction of GSS would definitely have cost implications for the companies. It was indicated that the cost required to meet an upscale in service requirements would be considerable due to the need for additional resources to handle all eventualities. The move to GSS was seen as a step change in service, and interviewees indicated that the costs required to achieve this would have to be recouped through future Price Control costs. Company representatives pointed out that current Price Controls were based on the assumption of delivering the standards in existence at the time the Price Control Final Determination was made, and that the costs associated with delivering additional or more stringent GSS would therefore need to be recovered through future Price Controls.

There were concerns that, if GSS were set too high, any failure to achieve agreed levels would lead to negative publicity and a decline in consumer confidence. It was suggested that if the reasoning behind GSS was to increase service standards, PSL and PNG would seek evidence of where they are currently lacking as they stressed that they currently strive to achieve good service and have not received negative feedback from either the Utility Regulator or the Consumer Council for Northern Ireland.

Representatives indicated that the introduction of GSS would cause an increase in costs to handle a problem that they do not believe exists. It was highlighted that the system changes required to provide service at the level currently guaranteed in GB would be substantial, requiring additional resources and further allowable costs. Following GB in this instance would not, in their view, be appropriate given the difference in the respective markets. It was also suggested that the introduction of GSS could be seen as a barrier to entry for potential new companies in a newly competitive market.

With regard to the specific areas where GSS could be introduced, PSL and PNG highlighted problems in relation to issues such as the precise wording of definitions included in the standards, for example the definition of a priority customer, a working day, and what constitutes a planned interruption among others.

It was suggested that there should be discussion around exemption for companies with respect to third party responsibility and extenuating circumstances and additionally that no standards could be enacted in situations of suspected criminal activity.

Representatives indicated that the process involved in meeting any proposed GSS should be analysed in order to design an appropriate and proportionate standard and compensation structure. The interviewees also commented that the introduction of GSS might impact on

the corporate culture, demotivating staff and having a detrimental effect on other operational processes. However, it was highlighted by representatives that interaction with current customers indicates that there are no outstanding customer service issues.

It was also highlighted that current GSS require the achievement of a standard in a certain percentage of cases (for example, to achieve a given standard in 90% of cases). If individual GSS and GSS payments are introduced, such standards effectively require 100% achievement. In Phoenix's view, this represents a step change to current GSS as well as significant incremental costs.

6.2 NI Water

NI Water (NIW) established that they were in a unique situation of being a 'GoCo' (a Government Owned Company) which was not currently charging for domestic water supply. It was acknowledged that service expectations would likely rise in response to the introduction of water charges.

Representatives accepted the principle of guaranteed standards of service (GSS) but stated that the timing of their implementation would require careful consideration. NIW highlighted existing limitations with their systems, their data and their resources and indicated that meeting some of the proposed standards at present would not be feasible. It was suggested that the cost required to bring sub-standard systems up to a reasonable level would perhaps be better invested in improving NIW's infrastructure, which was viewed as suffering from a legacy of under-investment.

The company exhibited a pro-customer service ethos, but proposed that phasing in GSS over an agreed period of time would be a more appropriate way forward, to enable NI Water to actually deliver better standards. The issue of the cost of developing systems to meet GSS was raised, and it was suggested that these costs should be accounted for in subsequent Price Controls.

It was suggested that there should be a regulatory review to show what the service issues in question are, what would be expected in terms of service requirements and to indicate the likely costs associated with bringing existing systems up to the required level. Representatives were keen that the unique situation of NI Water, as a non-departmental public body reporting to the Department for Regional Development (DRD), should also be considered in any new GSS arrangements, as government and departmental policies might need to be taken into consideration.

NIW suggested that consumer responsibility for aspects of water supply should also be considered, and it was noted that domestic customers do not currently have a full understanding of the process for water supply and sewerage services leading to a need for an education and communication process with consumers.

As with other utility companies, it was stressed that the definitions of what each standard constituted would be of critical importance and that exemptions, for example for third party incidents, would need to be identified and agreed. There were concerns that GSS should not be taken directly from GB. The company perceived significant investment in infrastructure in GB water companies (suggested to be some £80 billion since privatisation in England and Wales) has allowed companies there to agree and meet higher standards of service, thereby making a direct comparison between GB and NI inappropriate at present.

Overall, NIW expressed an understanding of the rationale for GSS but indicated that limitations in current systems (notably data systems), costs for bringing systems up to capacity and historical under-investment in assets and infrastructure meant that GSS are not currently appropriate for the sector in NI. It was suggested that, in the event of the

introduction of domestic charging, GSS could be phased in to allow successful implementation.

6.3 NIE

NIE provided a substantive presentation on current NIE Guaranteed Standards practice. The company highlighted that its guaranteed standards have not been revised to reflect the business separation of NIE from NIE Energy in 2007 and the required regulations to disaggregate these standards should be put in place before any enhancements are considered.

Based on experience of working to current GSS, NIE stated that significant costs and resources are required to establish and maintain standards. The company highlighted current performance in specific areas and suggested that any proposed changes should be proportionate and not lead to inefficient business practice. As an example NIE pointed out that an 12 hour supply restoration standard would require a level of capital investment and resources that would be cost-prohibitive and would, in its view, be impracticable. The company indicated that current systems are not capable of providing the service suggested by some proposed GSS, and that upgrading IT systems in particular to allow an increased level of service would increase costs and have a consequential impact on resource allocation. Aside from the substantial investment required to upgrade IT systems, management buy-in and adequate time would be required for the transition to be successful.

NIE representatives wanted to see a consistent set of standards across all regulated utility companies, and also raised the issue of who should pay for the increased costs associated with GSS, suggesting that while customers support the concept of GSS, they should understand that it will be they who ultimately bear the costs.

Representatives also noted the need to manage customer expectations with regard to GSS to ensure that meeting the standards did not detract from value for money for the entire customer base. On a positive note, NIE did state that GSS focused the company on customer service, the key importance of customer service in NIE being evidenced by the integration of key standards of performance within the Company's Key Performance Indicators. In NIE's view, GSS should complement what the utility company is doing well and drive good business practice.

6.4 firmus

firmus energy indicated that the company currently adheres to Standards of Performance which are reported on annually. There are ten standards, which were agreed with the Consumer Council four years ago. They cover areas including billing, public reported escapes, new connections to the network and energy efficiency. It should be noted, however, that failing to meet these standards does not currently incur a financial penalty.

firmus debated the necessity of updating current Standards of Performance alongside the possibility of developing standards for other areas of service. However, they feel that the standards currently in place are adequate and that the company takes sufficient corrective action on any problems as a matter of course. For example, in dealing with complaints, they have already ensured that a substantive response is made to the customer within 10 working days.

With regard to reconnecting a supply failure, firmus regarded 24 hours as a suitable timeframe, but suggested 12 hours could be problematic, depending on the size and nature of the problem. However, safety is paramount to fixing a gas leak, and therefore a timeframe guarantee would cause concern.

In relation to keeping appointments, firmus were of the opinion that communication is key, and that a GSS could in fact reduce levels of service. If an appointment cannot be kept, the consumer should be informed as early as possible. If a payment was incurred for this, there is the chance that if an appointment is missed, in order to avoid further penalty, companies will go straight to the following appointment, instead of communicating a delay to consumers, thus resulting in a poorer service rather than a more reliable one.

In general, firmus argue that they are adhering to most of the proposed GSS already to the best of their ability in terms of safety and geographical location. Problems would arise, in their view, due to the relatively dispersed nature of their customers across a wide area of Northern Ireland, thus making it difficult to put a strict time frame on dealing with an issue.

firmus indicated that there were concerns around the costs of implementing GSS, especially for a new business within an established market. It was understood that costs for this would come under Price Control so ultimately the customer would be paying for the benefit of having GSS. However, being a relatively new business to the gas market, firmus argue that their systems are modern, reliable and successful, as attested by the company's claim that firmus energy has not had a single Consumer Council complaint lodged against the company since their licence was awarded in March 2005.

firmus suggested that publicising GSS performance figures would be more beneficial for the consumer, and provide more incentive for the company. A league table of reliability would encourage companies to avoid bad publicity and increase consumer awareness.

firmus were not convinced how applicable GSS are in Northern Ireland as there are less consumers and less competition between companies here than in Great Britain. In their view, the focus should be on ensuring that work is completed properly and safely rather than within a strict time frame.

7. Conclusions

7.1 Utility companies

Representatives from leading utility companies were confident of the standards of service they currently provide to domestic and non-domestic customers, noting the lack of complaints received through the Utility Regulator or the Consumer Council for Northern Ireland.

The main concerns for the sector concerned the fact that, in their view, current systems are not capable of meeting the requirements associated with implementing GSS. On a larger scale, utility companies were reluctant to see GSS akin to those implemented in Great Britain brought to Northern Ireland, due to their perception of the vastly different infrastructures associated with the two territories.

As a consequence of these system and infrastructure issues, utility representatives spoke of potential damage to consumer confidence in their companies should GSS be implemented before companies can meet them, and suggested that any programme of implementation should be phased to enable these standards to be met.

Representatives in the water and gas sectors were also concerned that the cost implications of getting systems and infrastructures up to the standard suggested by proposed GSS would be highly prohibitive. It was suggested that these costs would have to be taken into account in Price Control, and also that increased costs might ultimately be borne by the customer. Aside from cost concerns, utility representatives were keen to see appropriate exemptions to GSS.

7.2 Domestic customers

Awareness and views of GSS

The research points to low levels of awareness of the Utility Regulator and its role, current GSS and GSS payments in the electricity sector. Less than one in five respondents (18%) were aware of the Utility Regulator, just one in ten (11%) were aware of GSS, and one in six (15%) were aware of GSS payments. While this points to the need to promote consumer awareness of current GSS, the qualitative research suggests that the concept, if not the terminology, of GSS is readily understood by most domestic customers through their experience with other service providers, particularly telecommunication and satellite television providers. The majority of survey respondents (73%) and focus group participants believed individual utility companies should be responsible for making consumers aware of GSS.

The qualitative research evidenced that domestic consumers tend not to think of standards of service in utilities in the way they might for other services they purchase (such as telecommunications), and while the idea of guaranteed standards was welcomed, participants were less certain about the idea of payments for failing to meet standards. There were concerns about who ultimately pays for the payments (i.e. would such costs be absorbed into the tariffs and ultimately paid for by the consumer?), whether such payments should be reinvested into services rather than passed on to consumers, and whether the standards might be counterproductive in terms of encouraging utility companies to focus on meeting individual standards rather than improving overall service.

Despite this, the quantitative survey suggests a significant majority of consumers are in favour of setting guaranteed standards of service (with varying support according to the aspect of service in question) and of implementing GSS payments where a standard has not been met (86% of respondents). The research also points to a significant majority of

consumers believing that payments are a good way of encouraging utility companies to improve their service and that the utility company and its shareholders should be responsible for meeting the cost of GSS (92% of respondents in each case).

The research findings suggest that consumers want to feel sure that exemptions are not applied where proper maintenance or suitable human resource management would have sufficed (such as exemptions for supply interruptions due to weather conditions exacerbated by poor maintenance, or industrial disputes). While respondents felt that acts of terrorism merited exemptions to payments (just 43% believing payments should still be made), the majority felt that exemptions to payments were not appropriate in cases of strike action (74%), accidental damage by a third party (66%), extreme weather conditions (56%) or cases of vandalism (54%).

Cost, level of payment and making claims

The research points to a strong desire for consistent standards and payments across each of the three utilities where these are applicable, primarily to make it easier for consumers to understand entitlement in various situations (most focus group participants and 97% of survey respondents). Similarly, automatic payments were favoured over those requiring the customer to make individual claims (90% of respondents). Despite this preference for consistency where possible, the findings suggest that consumers expect levels of payment to reflect the reason for the payment, and specifically the impact on the customer (83% of respondents).

Generic services

Consumer priorities for the setting of standards were: the time taken to restore supply (96% of respondents seeing it as important to have a GSS for this aspect of service); setting a minimum amount of notice for planned interruptions to supply (86%); and, setting a standard for interruptions exceeding the expected time (79%).

The aspects of service less likely to be regarded as priorities for guaranteed standards of service were those relating to the time taken to change a payment method (48% rating this important), having a two hour time slot for appointments (52%, a marked difference from the importance attached to this aspect in the qualitative research), and the time taken to respond to bill queries (59%).

The typical half-day appointment slot given for appointments with utility companies was seen as problematic and the findings suggest that, of the options proposed, consumers would most like to see a two hour time slot for appointments (83%). Those in employment felt that two hour time slots or appointments outside of working hours would be most convenient (75% in each case). In line with this, the research suggests consumers feel 24 hours is sufficient notice of an appointment that cannot be kept (72% of respondents), and that £20 was seen as an appropriate level of payment for missed appointments (75%).

In terms of complaint resolution, the qualitative research pointed to a greater desire for speedy resolution than for GSS payments, and both the qualitative and the quantitative research suggest that consumers wish to see complaints resolved in less than ten working days (55%). While ten working days was seen as an appropriate guaranteed timescale for making refunds (61% of respondents), it was viewed as excessive for dealing with meter queries (56% suggesting it should be less). Five working days was viewed as an acceptable length of time for changing payment methods (82%), and for dealing with bill queries (64%)

while a GSS payment of £20 for failing to meet bill or payment query timescales was regarded as appropriate (76%).

Electricity services

The research suggests that electricity services are unproblematic for the majority of consumers: just 10% had a problem or issue requiring contact with the electricity company in the previous 12 months, and the majority of these were related to bill or payment queries. With qualitative findings pointing to supply as the single most important aspect of services for consumers across all three utilities, the quantitative findings suggest such interruptions affect a minority of electricity consumers (24% had no supply interruptions in the previous 12 months and for 60% of these power was restored within 4 hours).

The majority of respondents, however, felt that neither the current standard guaranteeing restoration of supply within 24 hours in normal conditions is acceptable (73% suggesting this is too long), nor a standard guaranteeing restoration in 12 hours (58% suggesting this is too long). Indeed, the majority (60%) believed that restoration in normal conditions should be guaranteed within 4 hours. The current GSS payment level of £50 for failing to meet the 24 hour restoration standard was seen as acceptable to the majority (74%).

Finally, the research suggests the current standard guaranteeing 3 days notice of planned supply interruptions is acceptable, with 72% suggesting notice periods of 2 days or less.

Gas services

The research found a divergence between domestic and non-domestic experiences of gas services, with a much higher level of issues evidenced for domestic customers. One in ten (11%) had experienced at least one interruption to supply in the previous 12 months, and almost half of these interruptions (49%) were reported as lasting longer than 24 hours. It is worth noting that the level of reported interruptions experienced by domestic customers is higher not only when compared to non domestic customers but also in comparison to the figures recorded by the gas companies themselves. While the survey did not probe to determine the source of the interruption it is fair to assume that some of these interruptions could be due to reasons other than network failure. For example boiler breakdowns and self-disconnection by those who have pre-payment meters could potentially be included in this figure.

In line with the overall finding of the qualitative research, that reliability of supply is of paramount importance to consumers, gas respondents felt that the current GB standard of guaranteeing supply restoration in 24 hours was not appropriate (73% suggesting this was too long), and a standard of 12 hours was acceptable to less than half (55% suggesting 12 hours was too long). Indeed, the majority of respondents (51%) felt that less than 4 hours was a more acceptable timeframe for supply restoration in normal conditions. The current GB GSS, setting the GSS payment level at £30 for supply interruptions lasting longer than 24 hours, with a £30 payment for each additional 12 hour period without supply, was regarded as appropriate to the majority (70%).

Finally, the research indicates that the current GB standard guaranteeing 5 working days notice of planned supply interruptions is acceptable, with 84% suggesting this was an appropriate timescale.

Water and sewerage services

The quantitative research suggests that water and sewerage services are the least problematic of the three utilities for consumers, with 91% of water respondents having experienced no service difficulties in the previous 12 months. However it must be noted that, unlike gas and electricity customers, water customers have no reason to make contact for billing and payment issues. For those who had contacted their supplier, incidents of supply interruption, low pressure or external flooding were the most common reasons. The majority (83%) had experienced no supply interruptions in that time, and a significant proportion of these (40%) were of less than 4 hours duration.

The current GB standard guaranteeing 48 hours notice of planned interruptions was acceptable to most, with 79% proposing a timescale of less than this. Consumers have high expectations for the restoration of supply, as indicated by the 54% of respondents proposing that restoration in normal conditions should take no longer than 4 hours in normal conditions. The majority of respondents felt that 24 hours, and even 12 hours was too long for supply restoration in normal conditions (72% and 56% respectively). The proposed GSS payment of £20 for water supply interruption lasting longer than 12 hours for a small mains burst and 48 hours for a large mains burst with a further £10 for each additional 24 hours split opinion evenly between those who felt it was acceptable and those who felt it should be more (each 48%). Consumer priorities appear to be around guaranteed standards for internal and external sewer flooding (97% of respondents believing each should have a standard), with the time taken to respond and the time taken to resolve the problem with the sewerage system being the most important aspects of the standard.

7.3 Non-domestic customers

Awareness and views of GSS

Despite a low awareness of current GSS within the electricity sector (17% of non-domestic customers), the idea of GSS across utilities was widely welcomed (by all qualitative interviewees and 91% of survey respondents). GSS were viewed as a means of driving and sustaining improved service, although there was cynicism regarding how realistic the specific levels of service contained within the current electricity and proposed gas and water GSS were, and how strictly these standards would be enforced. Non-domestic customers also felt that individual companies should be responsible for promoting awareness of GSS, with the Utility Regulator taking on an enforcement role.

Generic services

Non-domestic customers placed the greatest emphasis on having a GSS ensuring response to emergency call outs within a fixed amount of time, with 90% of survey respondents wishing to see a standard for this aspect of service, and 53% suggesting it was the most important aspect of generic services.

Aside from such generic aspects of utility service such as getting through to companies on the telephone or querying bills, there was a strong desire to see as many GSS as possible standardised across utilities to provide a standards that would be uniform and easy for customers to understand.

Exemptions across all three utilities were seen as acceptable, but there was concern that these exemptions would be both appropriate in nature and applied under the scrutiny of the enforcing powers of the Utility Regulator.

Electricity services

The research found that non-domestic customers generally had good experiences of electricity services and reliability, with six out of ten (61%) of non-domestic customers having experienced no interruption to supply in the previous 12 months.

The qualitative research showed that supply reliability was the prime concern for non-domestic customers. This was reflected by the quantitative finding that having a fixed amount of notice for interruptions to supply lasting longer than 4 hours was the aspect of service for which most respondents wanted to see an associated GSS (79% of respondents overall and 31% suggesting it was the single most important aspect of electricity services). There was also significant support for a GSS in relation to the time taken to respond to issues (76% overall and 21% seeing this as the single most important aspect).

Issues around meter accuracy, billing and communication were evidenced in the qualitative phase. Qualitative interviews also highlighted dissatisfaction with current tariffs, a finding mirrored in the survey with the electricity sector having the highest number of comments that costs were excessively high (6%).

Gas services

The research indicates that non-domestic gas customers had the most positive experience of the three utilities, with 97% of survey respondents having experienced no interruption to supply in the previous 12 months. Despite this, the evidence points to a much higher degree of emergency call outs for gas consumers (12%) than for water or electricity consumers (7% and 8% respectively).

In line with findings for the electricity sector, the highest proportion of non-domestic gas customers wanted to see a GSS in place which guarantees a fixed notice period for planned supply interruptions lasting more than 4 hours (80% overall and 48% thinking this was the single most important aspect of gas services).

Water and sewerage services

Of the three utilities, non-domestic water customers had the least positive consumer experiences. This is reflected not only by comments about difficulties with communication and responsiveness made in the qualitative phase of the research, but also by the quantitative finding that the water sector had the highest level of complaints (9% compared to 4% in each of the other two utility sectors) and the highest incidence of interruptions to supply up to both 12 hours' duration (7% compared to 1% in gas and 5% in electricity) and 24 hours' duration (5% compared to 1% in gas and 0% in water).

While ensuring the quality of drinking water was regarded as the highest priority in relation to proposed GSS (84% overall and 30% suggesting this was the single most important aspect of water and sewerage services), supply reliability remained a core concern (also 84% wishing to see a GSS for having a fixed period of notice for supply interruption of longer than 4 hours and 22% seeing this as the single most important aspect of water and sewerage services). Finally, meter accuracy and cost were highlighted as concerns within the sector, with meter accuracy being a prime concern.