Views and Experiences of
Electricity and Gas Customers in Northern Ireland

EXECUTIVE SUMMARY

In December 2010, the Utility Regulator (UR) commissioned Social Market Research (SMR) to conduct research among electricity and gas customers in Northern Ireland. The research is based on a survey of a sample of 1203 electricity and natural gas customers which includes a booster sample of 400 natural gas customers. Fieldwork on the survey was conducted in February and March 2011 with respondents interviewed on a face to face basis in their own homes.

Given that just 15% of households use natural gas as their main energy source to heat their homes in Northern Ireland, a booster sample of natural gas customers was required to facilitate a detailed analysis of the views, experiences and behaviour of this specific group. Where appropriate the data have been weighted by main energy type to allow reporting at the overall Northern Ireland level. The weighting procedure applied corrects for the over sampling of natural gas customers, with control totals based on the 2009 Northern Ireland House Condition Survey.

NIE Energy supplies electricity to the vast majority of homes in Northern Ireland, with Airtricity and firmus Energy supplying a very small proportion;

Phoenix Supply Ltd is the main supplier of natural gas to homes in Northern Ireland, with firmus Energy supplying a small proportion of homes;

The key findings from the research are summarised as follows.

Switching Energy Supplier

- 60% of respondents are aware that it is possible to switch electricity supplier in Northern Ireland;
- 5% of households have switched electricity supplier in the last year;
- 29% of natural gas customers are aware that it is possible to switch natural gas supplier in Northern Ireland;
- 5% of natural gas customers have switched natural gas supplier in the last year;
- 5% of all households switched their main energy supplier in the last year;
- 8% of natural gas customers had switched from non natural gas to natural gas in the last year;
- Saving money (78%) was the most important reason for switching main energy supplier in the last year;
- 40% of switchers said they would consider switching again, with cheaper energy the key factor in any future decision to switch. This group would expect to save an average of 29% if they were to switch again;
- Supplier visits (54%) to households was the main method used to switch;

- 95% of those who switched found it easy to do so, with 38% saying they saved money on their energy bills;
- Most switchers (58%) expect the price with their new supplier to stay the same, with 17% expecting an increase and 12% a decrease;
- 80% of switchers found the experience a positive one, with financial savings (77%) the main benefit;
- 80% of switchers would recommend that others switch, with 85% satisfied with the service provided by their new supplier and just 8% dissatisfied;

Non Switchers

- 77% of households that have not switched, have never thought about switching;
- 22% of non switchers said they are too busy to switch, with 20% happy with the service provided by their current supplier, 17% citing too much hassle and 12% averse to change;
- A saving of 28% on future energy bills is the average discount that non switchers would expect to save if they did switch their main energy supplier;
- 50% said they are unlikely to switch main energy supplier in the future, with 19% saying they are likely;
- 78% of those who said they are likely to switch in the future cited financial savings as their key motivator;
- 36% believe that switching will be easy, with 23% of the view that it will be difficult and 41% unsure;
- 22% of non switchers believe that if they switched energy supplier, prices would increase in the next year (14% that they would decrease and 30% that they would stay the same);
- 73% of non switchers identified price as the key factor in any decision to choose a supplier;

Customer Information

- 69% of customers receive a bill from their main energy supplier with 91% opening bills received;
- 88% said that their main energy bill contains all the information they need, 73% that it is easy to understand with 16% finding their bill confusing;
- 24% believe that their main energy bill contains too much information with 45% saying that their bill could be more clearly presented;
- 80% of customers read the total amount due on their main energy bill, 53% the due date, and 35% previous balances or amounts paid to date;

- 54% of non natural gas customers said it is important that their electricity bill contains information on the environmental impact and carbon content of electricity supplied;
- 39% prefer to receive their main energy bill quarterly with 35% preferring monthly;
- 66% prefer to receive their main energy bill in paper copy format through the post, with 12% preferring email;
- 8% of customers said they need to receive more information on customer rights from energy companies;
- 38% of all customers would find a list of their customer rights useful, with 21% saying they would find information relating to contacting their energy supplier useful;
- 37% prefer to receive customer rights information on bills, with 29% expressing a preference for receiving such information in leaflet format with their bills;

Energy Efficiency

- 53% would consider changing their behaviour to use less energy, with 34% saying they would consider having energy efficiency measures installed;
- 36% would consider switching to a greener more environmentally friendly energy supply to reduce their carbon footprint;
- 12% would pay more for Northern Ireland to meet its energy efficiency targets, with 11% willing to pay more for Northern Ireland to meet its renewable energy targets;
- 10% would be willing to pay more to subsidise vulnerable groups;
- 89% would find it useful if information were provided on discounts for using energy at different times, with 91% finding information on how to reduce their bills useful;
- 60% if given the opportunity, would be likely to change their electricity use to an off-peak time and save money;
- 29% of those who said they would be unlikely to change their electricity use to an off-peak time believed that savings would be minimal, with 28% citing inconvenience / disruption as a reason;
- 40% rated their awareness of how much energy they use in their home as either excellent (10%) or good (30%);
- 66% rationalise their energy use in the home in terms of cost, with 16% thinking more about the amount of energy they use;
- 57% are interested in a real time device to help them use energy more efficiently at home;

- 34% believe that energy prices are more expensive in Northern Ireland compared with other European countries (28% the same and 2% less expensive);

Awareness of Energy Companies

- 97% are aware of the existence of NIE Ltd, 94% Phoenix Natural Gas, 94% NIE Energy, 88% Phoenix Supply Ltd, 81% Phoenix Energy Services, 76% Airtricity and 71% firmus Energy;

- Almost half (49%) of respondents incorrectly stated that NIE Energy is responsible for the generation of electricity, with 49% incorrectly stating that NIE Energy is responsible for power failures;

- There is evidence that customers are confused about which services are provided by which companies. When asked to select the company responsible for billing and payment 28% selected Phoenix Supply Ltd, 18% selected Phoenix Energy Services, 33% Selected Phoenix Natural Gas and the remainder either didn't know or thought it wasn't any of the above;

Pre-consultation Focus Groups

As part of the research process, SMR conducted 4 pre-survey focus groups to inform questionnaire design for the main survey. The focus groups took place during late January to mid-February 2011, with the groups held in suitable venues in Belfast, Newry, Derry/Londonderry and Enniskillen. A total of 42 participants attended. The groups were balanced in terms of gender, age, social class, main energy source used to heat the home and methods used to pay for main energy supply. The key outcomes from the group were:

- Most of the participants had experience of switching other service providers (e.g. mobile phone provider etc) with saving money the key motivation for doing so. Almost all with experience of switching service providers would recommend that others do the same;

- Only a small number of participants had switched energy supplier, with most satisfied with their decision to switch;

- Among those who have not switched energy supplier, there was some uncertainty with what was on offer, with concern that prices may increase following a switch. There was also a sense of 'if it's not broken, don't fix it', with participants valuing the stability afforded by the current supplier. Other reasons for not switching included the perceived hassle associated with switching and the potential for disruption;

- The main motivators for non switchers to switch energy supplier in the future were anticipated cost savings and a hassle free transition to a new supplier;

- Most participants who receive bills actually read them, with the main motivation for doing so to self validate their bills;

- With regard to information on bills, participants called for a breakdown of which appliances are using most energy, a breakdown of which rooms are using most energy, consumption of energy at peak times, discounts given and information on how to reduce energy use;

- Around a third of participants believe it is essential that customers receive information on fuel mix, although such information should be presented more clearly;

- With regard to information on consumer rights, most participants wanted contact phone numbers where they can get independent advice. It was also important that such telephone numbers should connect 'to a person rather than a machine';

- Receiving bills in paper format through the post is the preferred way of receiving energy bills;

- Most participants said that given the opportunity, they would consider switching their energy use to off-peak periods to save money. Most would also value a real time energy use device to help them see how much energy they are using, and to help them reduce their consumption;

- Only a minority of participants said they would be willing to pay more for their energy supply to help subsidise vulnerable customers, with 10% willing to pay more for greener energy;

- Finally, there appears to be some confusion around the Phoenix brand with equal numbers identifying Phoenix Supply as their natural gas provider and the same number identifying Phoenix Natural Gas as the provider. A small number identified Phoenix Energy Services as their provider. There was also confusion around the NIE (Energy and Ltd) brand among participants;

Conclusions

This research has found that although the majority of domestic electricity and natural gas customers in Northern Ireland are aware that it is possible to switch energy supplier, the level of switching is limited at just 5%. Most non switchers have not thought about switching, with being too busy to get around to it, and being content with current suppliers, the main reasons for not switching.

Set against an overwhelming reluctance to switch energy supplier is the positive experience and benefits enjoyed by those who have switched in the previous year. Among this group the key motivator for switching was to save money, with more than one third currently enjoying this benefit, with the majority of switchers expecting prices to remain static with their new supplier.

Based on the evidence from this survey, almost all switchers found it easy to switch supplier with high levels of satisfaction recorded for the time taken to switch as well as with their new energy supplier.

The survey also provided an opportunity to gain some insight into customer information requirements in relation to energy suppliers, with almost nine out of ten customers of the view that their main energy bill contains all of the information they need, with most of the view that it is easy to understand. However, there is a significant group of customers who believe that their main energy bill could be more clearly presented, with particular socio-demographic groups (e.g. those in lower social classes) more likely to find energy bills confusing.

This survey suggests that when customers receive their bills their main focus is on the total amount due and the payment date, with little attention given to customer service information, consumer rights or fuel mix and environmental impact information. This is not to say that this type of information is not important, but rather that customers associate their bills more with cost and payment information rather than as a mechanism for information provision in other areas.

Although the vast majority of customers are satisfied with the amount of information they receive on consumer rights, significant numbers of customers said they would find it useful to have a list of their rights, contacts within energy companies and the contact details of customer advice organisations. In addition to providing this information via energy bills, consumers also suggested a range of other ways of communicating information on consumer rights such as TV and radio advertising, leaflets and newspapers.

Reducing the amount of energy used is a key strategic target for society in general, and the findings from this survey suggest that most people in Northern Ireland would consider changing their behaviour to use less energy. However, when presented with a range of specific interventions, majority support is replaced by only limited support for actions such as having energy efficiency measures installed and switching to a greener more environmentally friendly supply. Moreover when respondents are asked to pay to help Northern Ireland meet energy efficiency and renewable energy targets the level of support falls further, albeit particular social groups are more supportive than others. This suggests that initiatives and programmes aimed at encouraging greater energy efficiency may be more attractive if they are cost neutral to customers. Again the evidence from this research suggests that initiatives such as providing discounts for using energy at different times, providing information on how to reduce bills and a breakdown of which appliances contribute most toward household bills, are all perceived as being useful to customers. Furthermore, the finding that most electricity customers are supportive of moving their energy use to an off-peak time provides an opportunity to help customers use less energy.

Not only is there limited support for paying for different energy efficiency interventions, there is little support among consumers to help subsidise the price of energy for vulnerable customers. This may reflect the current economic climate with the vast majority not identifying such a subsidy as a customer responsibility.

Only a minority of customers in the survey rated their awareness of how much energy they use as either excellent or good, with around one fifth thinking about their energy use on a frequent basis. These are indicators which can be monitored over time, with cost rather than amount of energy used the main focus for customers. This suggests that interventions focused on energy cost reduction may find more resonance with customers rather than initiatives aimed at promoting a reduction in the units of energy used. The level of respondent interest in real time energy, tied with the associated cost savings, may help encourage positive behaviour change among customers.

Finally, the survey has found a high level of awareness of the various companies active in the domestic retail energy market in Northern Ireland.

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1. Introduction

In December 2010, the Utility Regulator (UR) commissioned Social Market Research (SMR) to conduct research among electricity and gas domestic customers in Northern Ireland.

1.1 Key Drivers

A key strategic driver for the UR is to ensure that the utility industries in Northern Ireland are regulated and developed within the strategic policy parameters set by government. To help support this process, the Regulator regularly engages in consultation exercises to ensure that disparate voices are not only heard but directly inform UR corporate-level actions and subsequent improvement in operational plans.

This current research project further reinforces the UR's commitment to consultation and builds upon the organisation's evidence base to help shape and direct the role of utility industries in Northern Ireland.

One of the most significant changes within the energy sector in Northern Ireland in recent years has been the opening up of the energy market, with an increase in the number of energy suppliers. In response to this change the Utility Regulator has a duty to assess the potential benefits of energy retail competition and to define a programme of regulatory intervention to address entry barriers and enable choice. As part of this process, areas have been identified where the Regulator must either act or monitor closely to enhance the level of competition in the energy retail sectors.

To ensure the voice of the domestic energy consumer was represented, the Utility Regulator in collaboration with the Commission for Energy Regulation (CER) in the Republic of Ireland, commissioned research in 2010 to better understand consumer attitudes to, and awareness of, electricity supply competition. This current research paper follows the main lines of the 2010 research. It explores consumer awareness and understanding of the electricity and gas markets, engagement in the competitive market, switching behaviours and motivators, information issues, preferences with regard to service, tariffs and pricing structures including their willingness to pay for specific options.

It is anticipated that the outcomes from this current survey will inform a number of projects outlined in the UR's Forward Work Programme for 2011/12 (i.e. billing information and clarity, baseline measurement for some of the retail market monitoring indicators). The research paper will contribute to the Regulator's understanding of consumer behaviour within the ever changing retail energy market in Northern Ireland.

1.2 Terms of Reference

In accordance with the Terms of Reference the primary purpose of the research is to *'inform the development of a number of consumer projects going forward'* with the research outcomes also informing policy and decision making-making across electricity and gas work streams related to:

- Competition policy and market development including deregulation policy;

- Implementation of the EU 3rd Energy Package;
- Market entry;
- Smart metering;
- Retail market monitoring;
- Billing clarity;
- Annual statements;
- Protecting vulnerable customers;
- Social Action Plan;
- Codes of Practice.

The research process will produce evidence of consumer awareness and understanding of the electricity and gas markets, engagement in the competitive market, switching behaviours and motivators, information issues, preferences with regard to service, tariffs and pricing structures including their willingness to pay for specific options.

1.2.1 Areas of Investigation

In accordance with the Terms of Reference the research sought to generate information on the following:

General

- Demographic information;
- Fuel use and main heating source e.g. electricity, natural gas, oil, coal, LPG;
- Switching behaviour and experience in other markets e.g. banking, insurance, home heating oil, telecoms (landline, mobile and broadband);
- Take-up of broadband;
- Awareness of roles and responsibilities for regulation and consumer protection.

Electricity

- Awareness of opportunity to switch supplier;
- Switching behaviour, motivators, experience, outcomes and future intentions;
- Awareness of suppliers;
- Awareness of roles and responsibilities of network and supply providers.

Natural Gas

- Intentions to switch and motivators;
- Awareness of natural gas suppliers;
- Awareness of roles and responsibilities of network and supply providers.

- Empowerment;

- Information required by the consumer for:

  - Shopping around;
  - Switching;
  - Energy efficiency / cost control;
  - Environmental impact / carbon footprint;
  - How consumers wish to receive the information, when and how often.

Consumer Preferences:

- Services;

  - Payment methods, frequency and willingness to pay;
  - Smart metering and willingness to pay;
  - Billing, frequency and medium and willingness to pay;

Tariffs / pricing structures, effect on consumption and willingness to pay

1.3 Research Method

Given the importance of the research, and the contribution of the results to shaping Regulator work streams, it was imperative that the research approach produced results which are representative of domestic electricity and gas customers in Northern Ireland. To this end in-home face-to-face interviews (n=1203) were conducted with electricity and gas customers in Northern Ireland, with four focus groups carried out at the pre-survey stage. In summary the methodology was based on the following elements:

- Survey of a nationally representative sample of 803 households across Northern Ireland;

- An additional booster sample of 400 households using natural gas; and,

- 4 pre-survey focus groups with consumers to refine the issues and themes to be addressed in the survey, with groups hosted in Belfast, Antrim, Armagh and Enniskillen (a key point summary of the findings from the groups is attached as Appendix A of this report);

1.3.1 Sample Profile

Table 1.1 presents the sample profile (unweighted) compared with known population parameters and shows that sample estimates are consistent with population estimates.

Table 1.1 Sample Profile (n=1203) [unweighted]

		Sample (%)	Census (%)
Sex	Male	49	48
	Female	51	52
Age	16-29	21	25
	30-49	41	37
	50-64	24	21
	65+	14	18
Social Class	ABC1	46	47
	C2DE	54	53
Main Energy Source	Non Natural Gas	63	85
	Natural Gas	37[1]	15

Source: Sex, age and social class based on Northern Ireland Census of Population (2005 Estimates); Estimate of natural gas and non natural gas customers based on NI House Condition Survey (2009)

1.3.2 Questionnaire

The questionnaire was developed collaboratively between SMR and the Regulator and is included as Appendix B of this report.

1.3.3 Data Collection

The survey was conducted using Computer Assisted Personal Interviewing (CAPI). Fieldwork on the survey was conducted between 25 February and 18 March 2011. A pilot survey, based on 20 respondents, was conducted on 10 February 2011. All interviews were conducted on a face-to-face basis with interviewers briefed before the commencement of fieldwork.

1.3.4 Notes on Tables

Due to rounding row and column totals within tables, figures may not always sum to 100. Note that base totals may also change in tables depending on question routing. It should be noted that dash marks [-] are used in some tables to indicate that the figure is less than 1%.

1.3.5 Statistical Significance

Where differences between subgroups of the sample (e.g. between natural gas and other customers) are referred to in the text of this report, these differences are statistically significant to at least the 95% level.

[1] Includes a booster sample of 400 natural gas customers

1.3.6 Weighting

Given the over sampling of natural gas customers, data reported at the overall Northern Ireland level have been statistically weighted to correct for this. Control totals are based on estimates from the 2009 Northern Ireland House Condition Survey[2]. Where the findings are reported for natural gas customers only (e.g. experience of switching natural gas supplier etc), the findings are based on unweighted data rather than weighted data.

1.3.7 Geographical Analysis

Analysis by geographical area is based on households in Belfast compared with households in other areas of Northern Ireland.

[2] http://www.nihe.gov.uk/2009_northern_ireland_house_condition_survey___statistical_annex.pdf

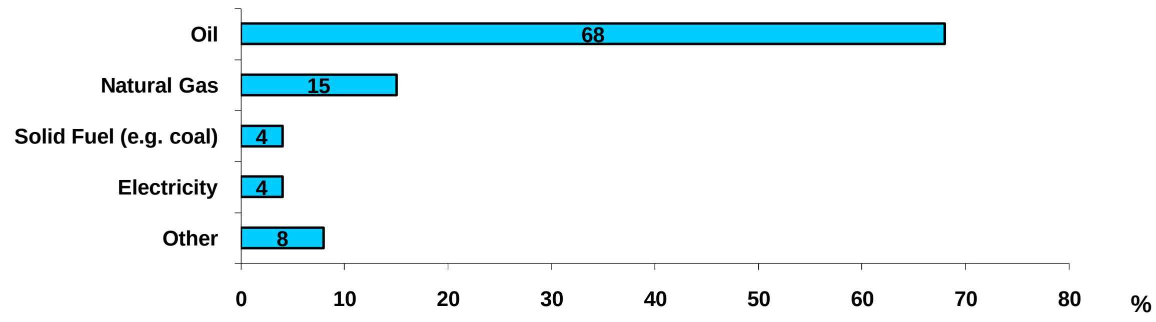
2. Research Findings

This section of the report presents the findings from the research under specific themes.

2.1 Main Energy Source

Figure 1 presents a profile (weighted) of the main energy source used by respondents to heat their homes, with oil used by 68% of respondents, natural gas by 15%, solid fuel by 4%, electricity by 4% and other sources by 8%.

Figure 1: Main energy source used to heat home? (n=1203)

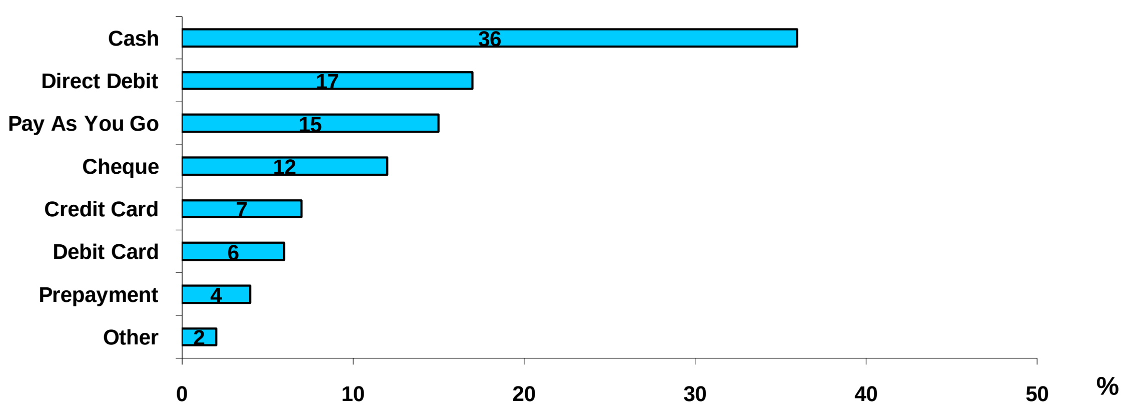


There was significant variation by region, with households in Belfast (46%) compared with households in other areas (5%) more likely to use natural gas (this reflects the greater availability of natural gas in urban areas). Areas outside of Belfast were more likely to use oil (80% vs. 35%). Respondents who described where they live as urban (19%) were also more likely to use natural gas as their main heating source compared with respondents in rural areas (2%).

2.1.1 Payment Method for Main Energy Source

Paying by cash (36%) was found to be the most common method for paying for the main energy source to heat homes, with 17% paying by direct debit, 15% using Pay As You Go (PAYG), 12% using cheque, and credit and debit cards being used by 7% and 6% of customers respectively. Prepayment options are used by 4% of customers.

Figure 2: How do you pay for your main energy source to heat your home? (n=1203)



Analysis by fuel type shows that those using natural gas and electricity as their main heating source were more likely to use direct debit and Pay As You Go (PAYG), whereas those using oil and solid fuel as their main heating source were more likely to pay in cash. Table 2.1 also shows significant variation in payment method by other socio-demographic groups with the level of statistical significance also noted.

Table 2.1: Payment Method by Customer Characteristics (n=1203, weighted)

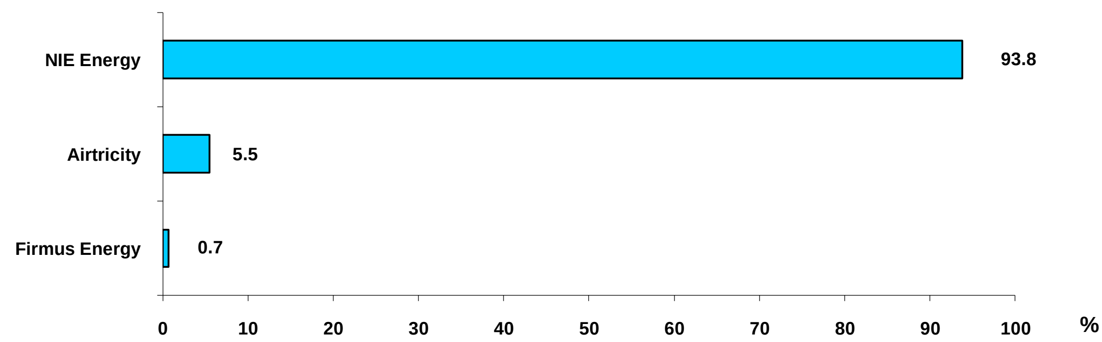
		Payment Method							
		Direct Debit	Pre Payment	PAYG	Credit Card	Debit Card	Cash	Cheque	Other
		%	%	%	%	%	%	%	%
Fuel Type***	Natural Gas	32	9	49	3	3	3	1	1
	Oil	14	4	7	9	5	44	16	2
	Solid Fuel	-	-	10	2	8	73	4	4
	Electricity	35	6	46		6	4	2	-
	Other	15	-	5	10	20	30	15	5
Sex*	Men	18	3	13	7	8	38	12	3
	Women	17	6	17	8	4	35	13	1
Age**	16-29	12	2	18	3	7	44	11	3
	30-49	22	5	13	9	7	31	12	2
	50-64	15	5	13	10	5	36	14	3
	65+	18	4	19	5	5	40	10	-
Marital Status**	Single	11	3	21	4	5	40	12	4
	Married /CH	19	4	12	8	6	35	14	2
	Sep/Wid/Div	19	5	19	9	6	36	5	2
Social Class**	ABC1	21	3	14	7	6	32	15	3
	C2DE	14	6	16	7	6	40	10	1
Area**	Urban	20	9	34	16	5	14	3	0
	Rural	17	3	9	5	6	44	15	3
Region ***	Belfast	20	9	34	16	5	14	3	0
	Other Areas	17	3	9	5	6	44	15	3
Housing ***	Owner Occ	19	4	11	8	4	37	15	2
	Public	13	7	26	4	6	41	3	0
	Private	16	4	16	9	11	32	12	0
Customer ***	Natural Gas	32	9	49	3	3	3	1	1
	Other	15	3	9	8	6	43	14	2

* ($X^{2,}$ $p<0.05$); ** ($X^{2,}$ $p<0.01$); *** ($X^{2,}$ $p<0.001$);

2.2 Electricity Supplier

Results of this survey show that in more than nine out of ten cases (93.8%) NIE Energy supplies electricity to respondent's homes, with Airtricity accounting for 5.5% of provision and firmus Energy 0.7%.

Figure 3: Which company supplies electricity to your home? (n=1203)



2.2.1 Aware That You Can Switch Electricity Supplier

Among all respondents, 58% are aware that it is possible for households in Northern Ireland to change their electricity supplier.

Compared with public and private rented sector tenants, owner occupiers (68%) were more likely to know that it is possible to switch electricity supplier in Northern Ireland. Those who have experience of switching other service providers (e.g. mobile phone, broadband provider etc) were also more likely to be aware that is possible to switch electricity supplier (62%).

Table 2.2 Did you know that it is possible for households in Northern Ireland to change their electricity supplier (n=1203)

		Yes (%)
All Respondents		58
Age***	16-29	43
	30-44	61
	45-64	66
	65+	61
Marital Status***	Single	45
	Married / Cohabiting	62
	Separated, widowed, divorced	59
Dependents (aged <=16)*	Yes	54
	No	60
Social Class*	ABC1	61
	C2DE	55
Housing Tenure***	Owner Occupier	68
	Public (NIHE)	42
	Private Tennant	42
Internet Access***	Yes	61
	No	47
Switched Other Service Providers**	Yes	62
	No	53

* (X^2, $p<0.05$); ** (X^2, $p<0.01$); *** (X^2, $p<0.001$);

2.2.2 Switched Electricity Supplier in Last 12 Months

Overall 5% of households said that they had changed their electricity supplier in the last year. Amongst those who had switched, the vast majority (78%) switched from NIE Energy to Airtricity.

Those in social classes ABC1 (7%) were more likely to have switched electricity supplier in the last year, as were those with access to the internet (6%).

Table 2.3: Have you changed your **electricity** supplier in the last year? (n=1203)

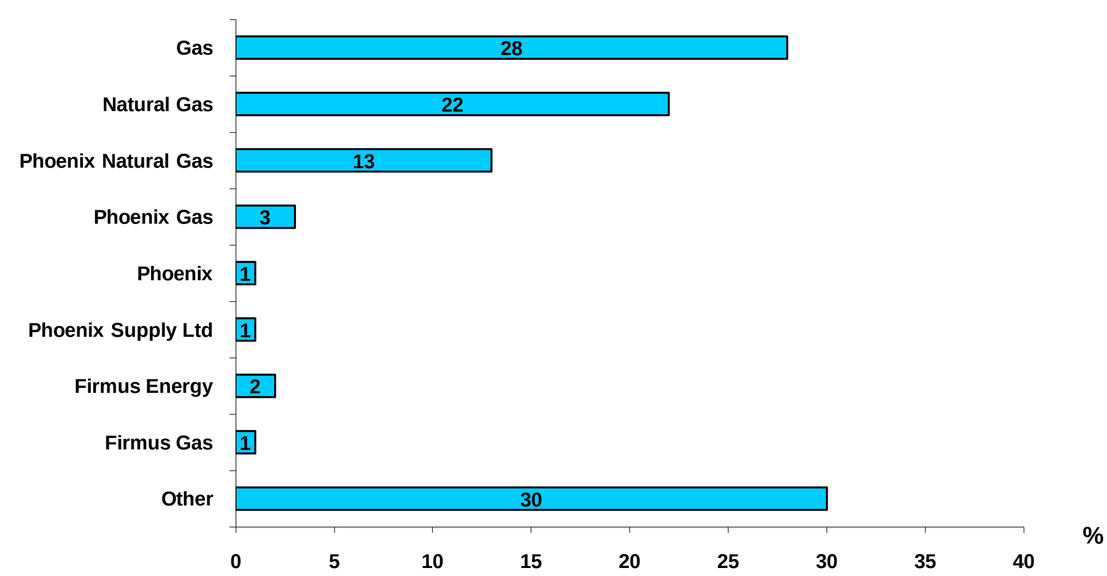
		Yes (%)
All Respondents		5
Social Class*	ABC1	7
	C2DE	4
Education*	Degree or equivalent	7
	A 'Level or equivalent	4
	GCSE or equivalent	7
	No Qualifications	2
Internet**	Yes	6
	No	3

* ($X^{2,}$ p<0.05); ** ($X^{2,}$ p<0.01); *** ($X^{2,}$ p<0.001);

2.3 Non Natural Gas Customers Preference if Switching Energy Supplier

Non natural gas customers were asked if they were to change the type of energy they use to heat their home, what type of energy they would change to. Although half (50%) of respondents said they would switch to gas or natural gas, one in six (18%) spontaneously mentioned a variation of Phoenix, with 3% citing a variation of firmus [note that the 'other' category includes: would not change, 12%; change to coal / fossil fuel, 5%; not possible to change, 1%; wood / wood burning stove, 1%; solar energy, 1%; electricity, 0.3%; open fire, 0.3%; other, 2%; and, don't know, 7%).

Figure 4: Type of energy that non natural gas customers would change to? (n=1016)



Those living in urban areas were more likely to cite the Phoenix brand (19% vs. 11%) as were those living in Belfast compared with other areas of Northern Ireland (29% vs. 15%).

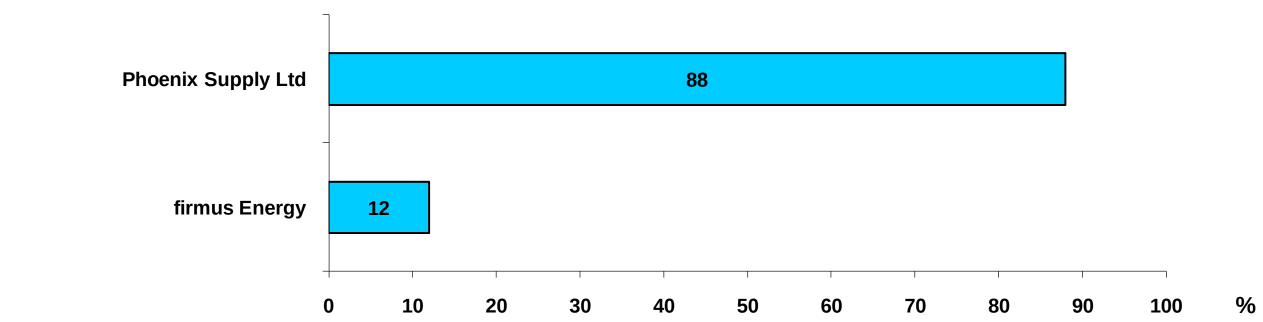
2.4 Switching to Natural Gas in the Previous Year

In the previous year, 8% of natural gas customers had switched from non gas (oil, coal etc) to natural gas, with respondents living in rural areas (33% vs. 7%) more likely to report switching. Those who have experience of switching to other service providers (e.g. mobile phone, broadband provider etc) were also more likely to have switched from non gas (oil, coal etc) to natural gas in the last 12 months (10% vs. 1%).

2.4.1 Current Natural Gas Supplier

Results of this survey show that among all natural gas customers, 88% are supplied by Phoenix Supply Ltd with 12% supplied by firmus Energy.

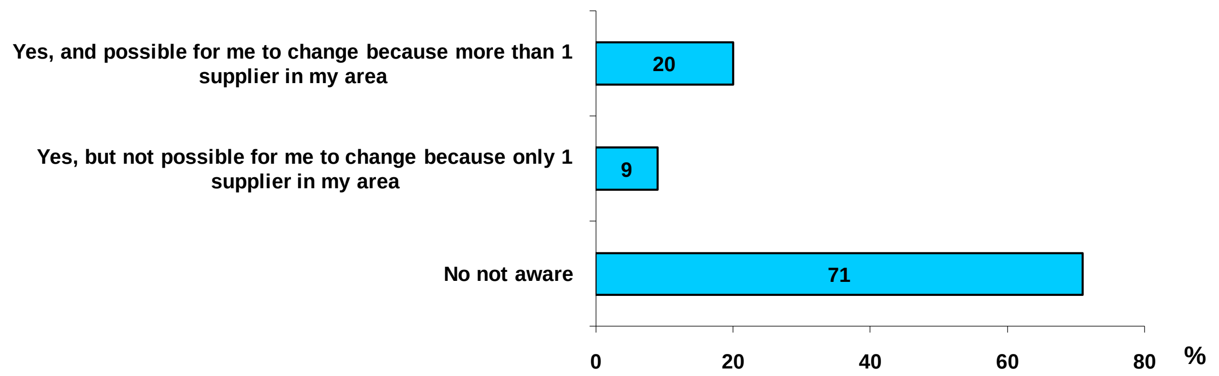
Figure 5: Which company supplies natural gas to your home? (n=440)



2.4.2 Aware That You Can Switch Natural Gas Supplier

Among natural gas customers, 29% are aware that it is possible to switch natural gas supplier, with 20% aware and able to switch because there is more than one supplier in their area and 9% aware but unable to switch because a sole supplier covers their area.

Figure 6: Did you know that depending on location, it is possible for some households using natural gas to change their supplier? (n=440)



Awareness that it is possible to switch natural gas supplier was higher among natural gas customers in areas outside of Belfast (37%), as well as among customers who are aware that it is possible to switch electricity supplier (43%) and customers who had switched electricity supplier in the last year (62%). Awareness that it is possible to switch was lower among natural gas customers educated to degree level or equivalent (16%).

Table 2.4: Did you know that depending on location, it is possible for some households using natural gas to change their supplier? (n=440)

		Aware (%)
All Respondents		29
Limiting Long Term Illness, health problem or disability In Household**	Yes	17
	No	32
Region*	Belfast	26
	Other Areas	37
Education***	Degree or equivalent	16
	A 'Level or equivalent	28
	GCSE or equivalent	42
	No Qualifications	29
Aware that it is possible to Switch Electricity Supplier***	Yes	43
	No	10
Switched Electricity Supplier in Last 12 Months***	Yes	65
	No	27

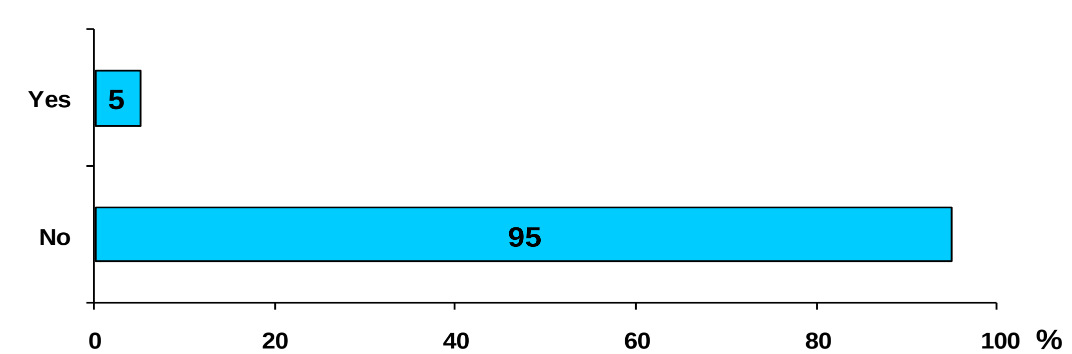
* (X^2, p<0.05); ** (X^2, p<0.01); *** (X^2, p<0.001);

2.4.3 Switch Natural Gas Supplier in Last 12 Months

Among all natural gas customers in the survey, just 5% (n=20) had switched gas supplier in the last 12 months.

Natural gas customers who had switched electricity supplier in the previous 12 months (35% vs. 3%, p<=0.001), as well as those who had experience of switching other service providers (6% vs. 1%), were more likely to have switched supplier.

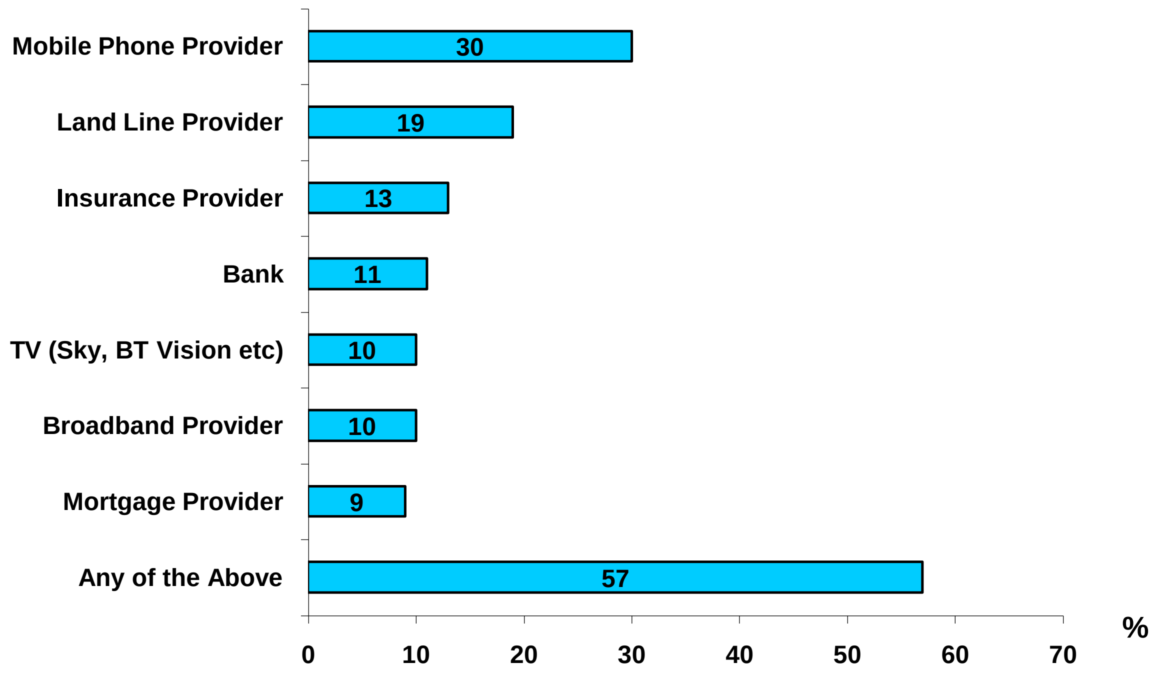
Figure 7: In the last year have you switched natural gas suppliers? (n=440)



2.5 General Switching Behaviour

Respondents were asked to say if they had ever switched providers for a range of services, with 30% having switched mobile phone provider, 19% land line provider and 13% insurance provider. More than half (57%) of respondents had switched at least one of the providers listed.

Figure 8: Have you ever switched any of the following service providers? (n=1203)



Switching service providers was less likely to be reported by older respondents (aged 65+), whereas those more likely to switch included respondents in the higher social classes, those with dependents, those living in Belfast, tenants in private rented accommodation, those with household access to the internet and respondents with a higher level of educational attainment. Natural gas customers were also more likely to report switching experience with other service providers.

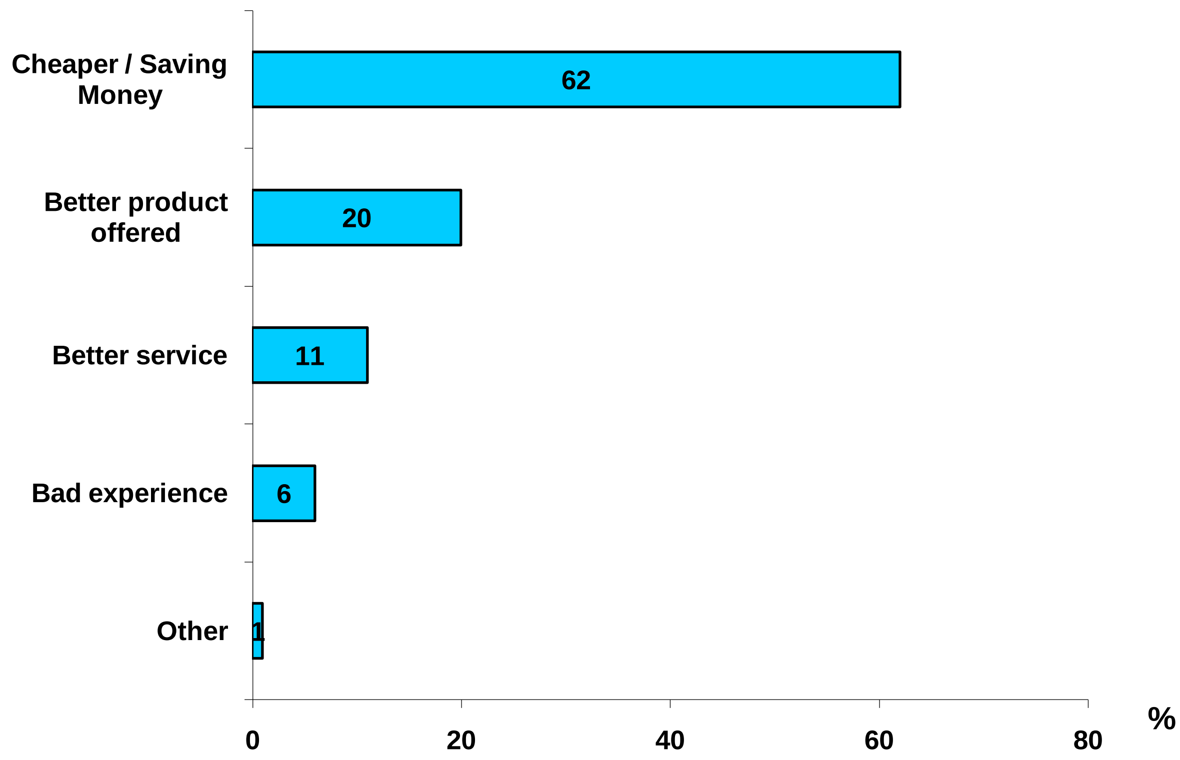
Table 2.5 Switch Other Service Providers by Respondent Characteristics (n=1203)		
		Yes (%)
All Respondents		57
Sex**	Male	61
	Female	53
Age***	16-29	50
	30-44	65
	45-64	56
	65+	47
Marital Status**	Single	50
	Married / Cohabiting	60
	Separated, widowed, divorced	64
Social Class**	ABC1	62
	C2DE	53
Education***	Degree or equivalent	73
	A 'Level or equivalent	57
	GCSE or equivalent	57
	No Qualifications	43
Dependents (aged <=16)**	Yes	62
	No	53
Region***	Belfast	70
	Other Areas	52
Housing Tenure***	Owner Occupier	58
	Public	43
	Private Tennant	66
Internet Access***	Yes	63
	No	40
Customer ***	Natural Gas	68
	Other	55
* ($X^{2,}$ p<0.05); ** ($X^{2,}$ p<0.01); *** ($X^{2,}$ p<0.001);		

2.5.1 Most Important Reason for Switching Providers

Among respondents who had experience of switching service providers, their most important motivation for doing so was that their new service provider was cheaper (62%). One in five (20%) switched to avail of a better product, with 11% citing better service and 6% switching because of a bad experience with a service provider.

Natural gas customers were less likely to be motivated to switch by saving money (46% vs. 63%, p<=0.05) and more likely to be motivated to switch by bad experience (23% vs. 6%).

Figure 9: Looking back what was the most important reason you switched service provider (s)? (n=558)



2.5.2 Factors Influencing Choice of Energy Supplier if Switching in the Future

If respondents were considering switching electricity or gas supplier, 62% said that they would normally decide on the basis of cost, with 8% attracted by a better service, 5% through recommendation and 3% as a result of advertising.

2.6 Switching Supplier

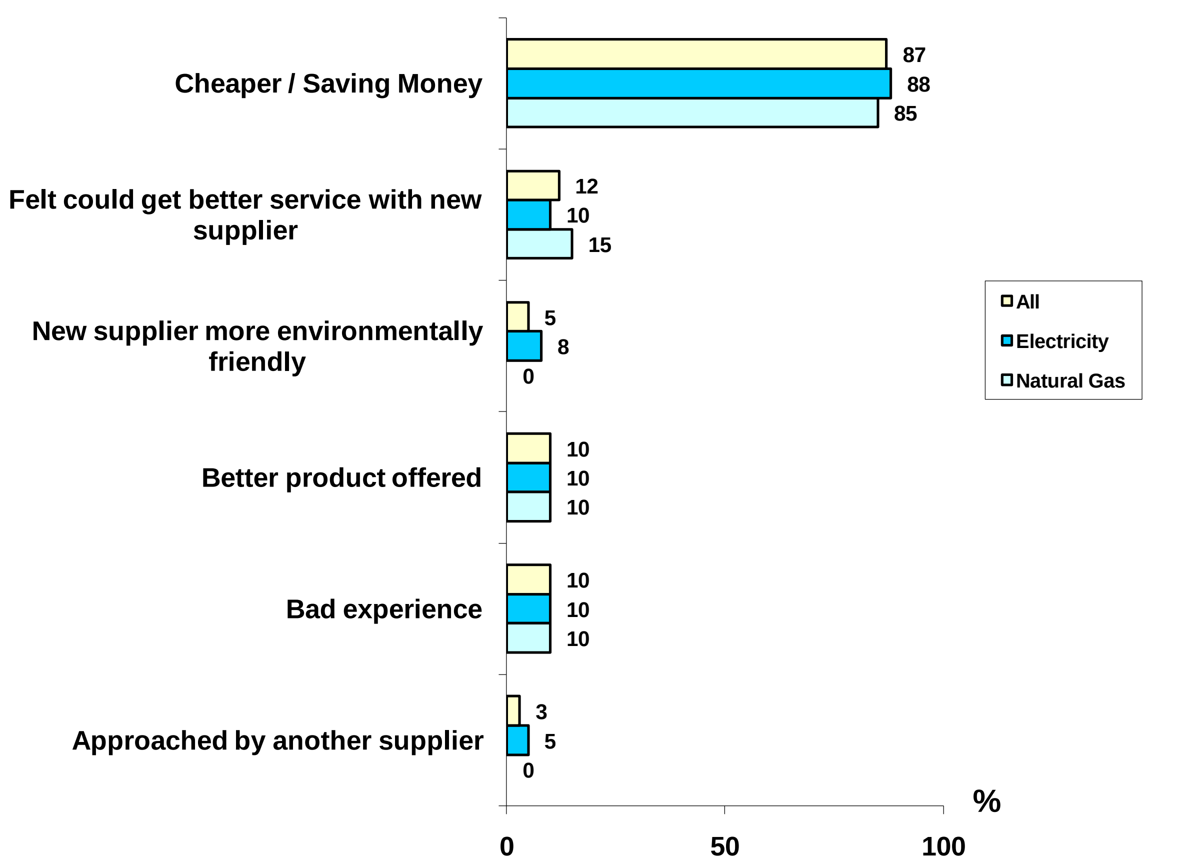
The main survey identified a total of 43 customers who had switched supplier of which 40 non gas customers had switched electricity supplier and 3 natural gas customers had switched natural gas supplier.

The booster sample of 400 natural gas customers identified a further 17 customers who had switched natural gas supplier. The total number of respondents who had switched their main energy supplier was 60 [note that the analysis in this section of the report is based on unweighted data].

2.6.1 Reasons for Switching Supplier

Among those who had switched their main energy supplier in the past year, 87% had done so to save money with similar proportions of gas and electricity switchers citing this reason.

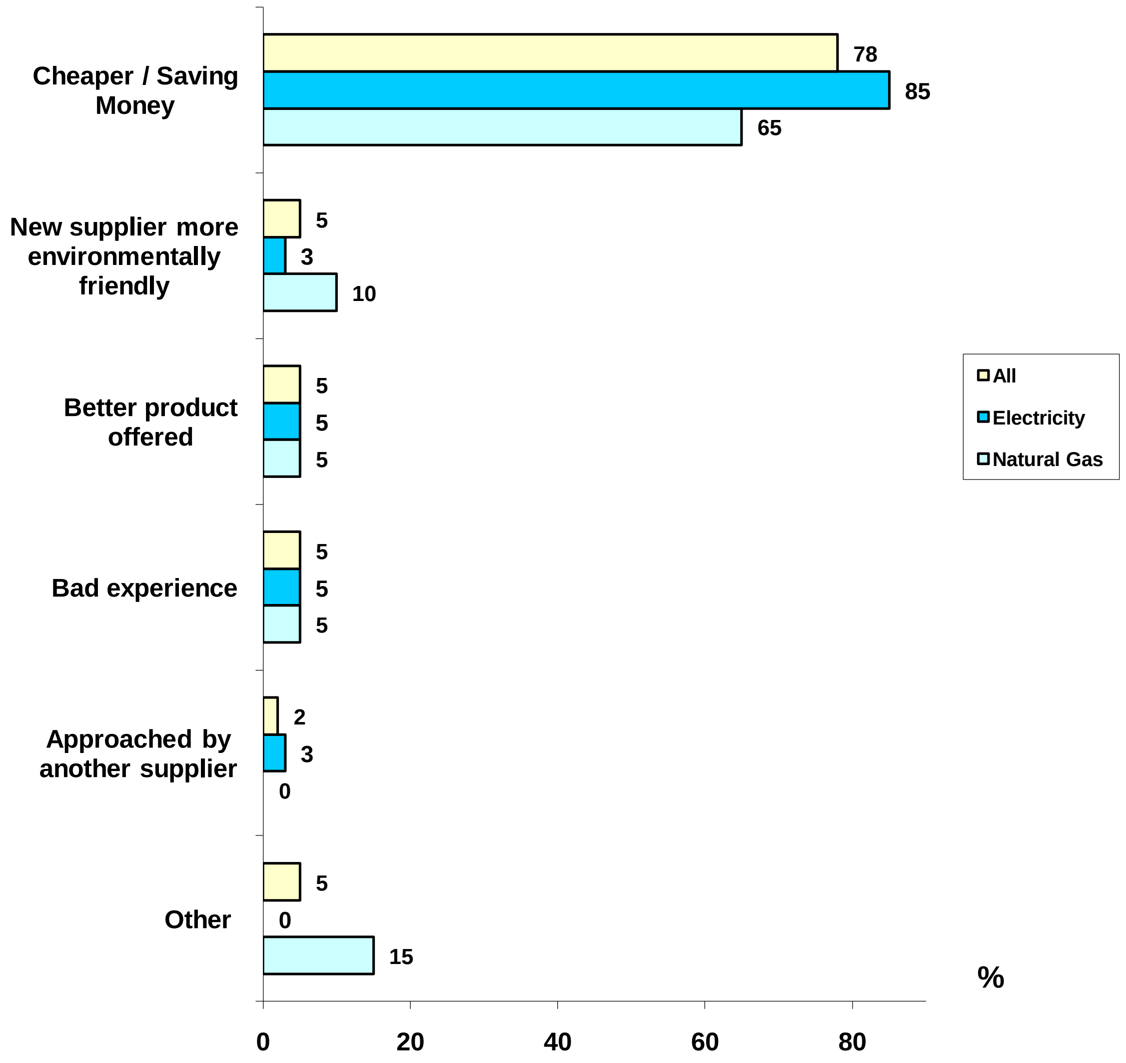
Figure 10: Why did you change your supplier? (n=60)



2.6.2 Most Important Reason for Switching Supplier

Of the reasons listed for switching main energy supplier, saving money is the most important (78%), with no significant difference in response between natural gas and electricity switchers.

Figure 11: Most important reason why you changed supplier? (n=60)

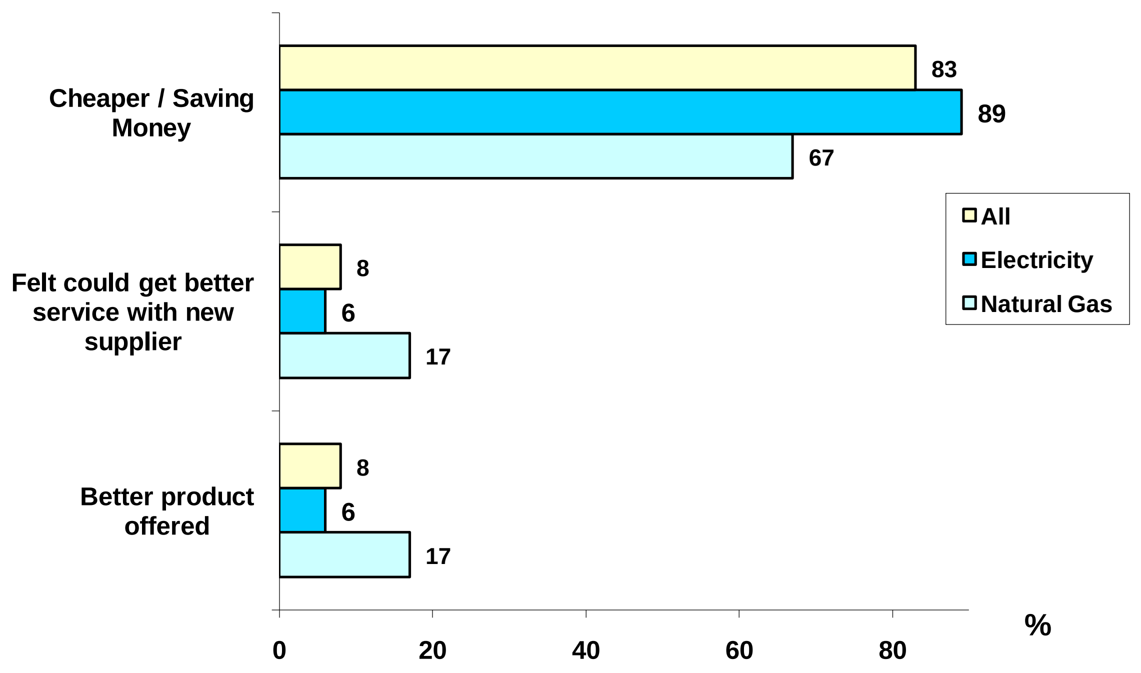


2.6.3 Consider Switching Supplier Again

Among all switchers, 40% said that they would consider switching supplier again, with no significant difference between natural gas (30%) and electricity (45%) customers.

Among those who indicated that they would switch supplier again (n=24), a cheaper alternative (83%) would be the key factor in their decision with 8% identifying better service as the key factor and the same number (8%) citing a better product. There was no significant variation in response between natural gas and electricity switchers.

Figure 12: What would be the key factor in your decision to switch supplier in the future? (n=24)



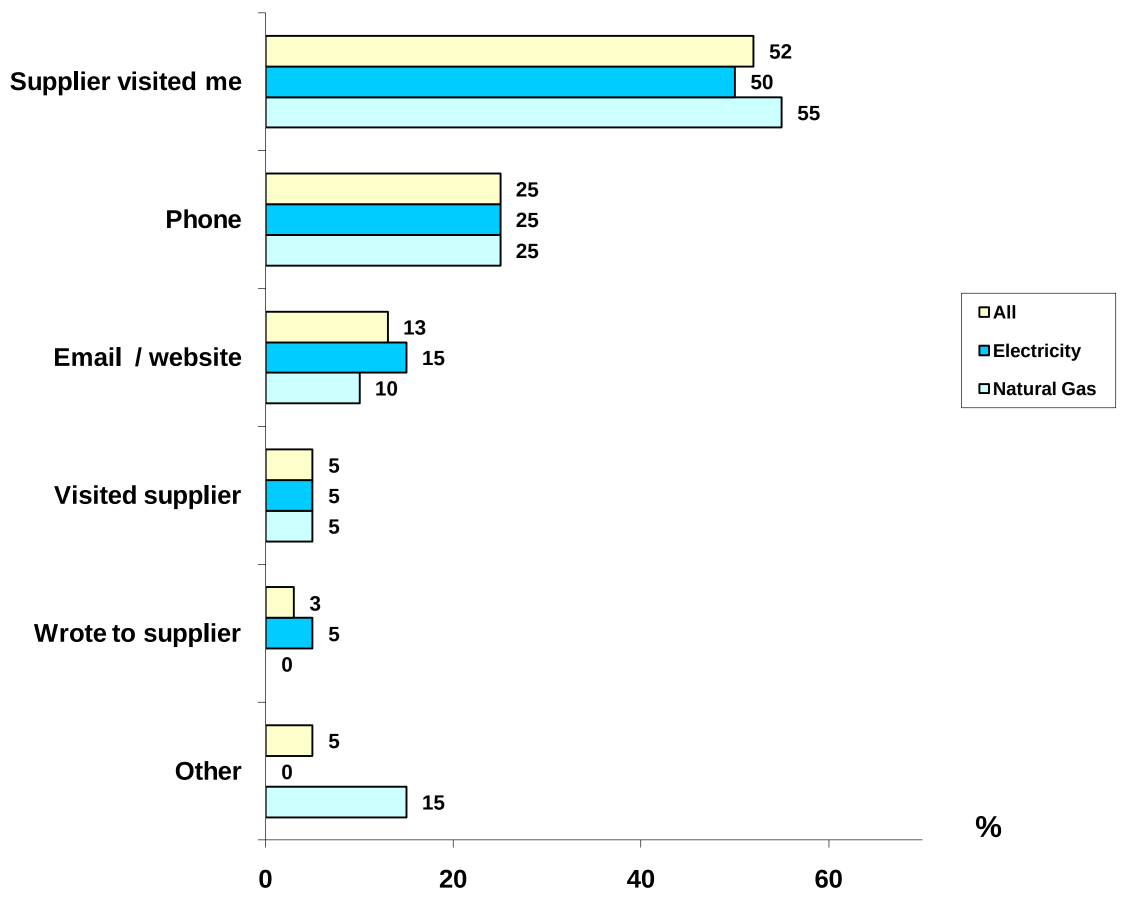
2.6.4 Expected Saving if Switched Supplier in the Future

Of those who said they would consider switching supplier in the future, the average percentage they would expect to save if they were to switch supplier is 29% (range 5% to 75%). Natural gas customers expected an average saving of 45% with electricity customers expecting an average saving of 23%.

2.6.5 Methods Used to Switch Supplier

Being visited by a supplier was found to be the most common method used by customers to switch supplier (52%), with phone contact cited by 25% of all switchers and email / website cited by 13%.

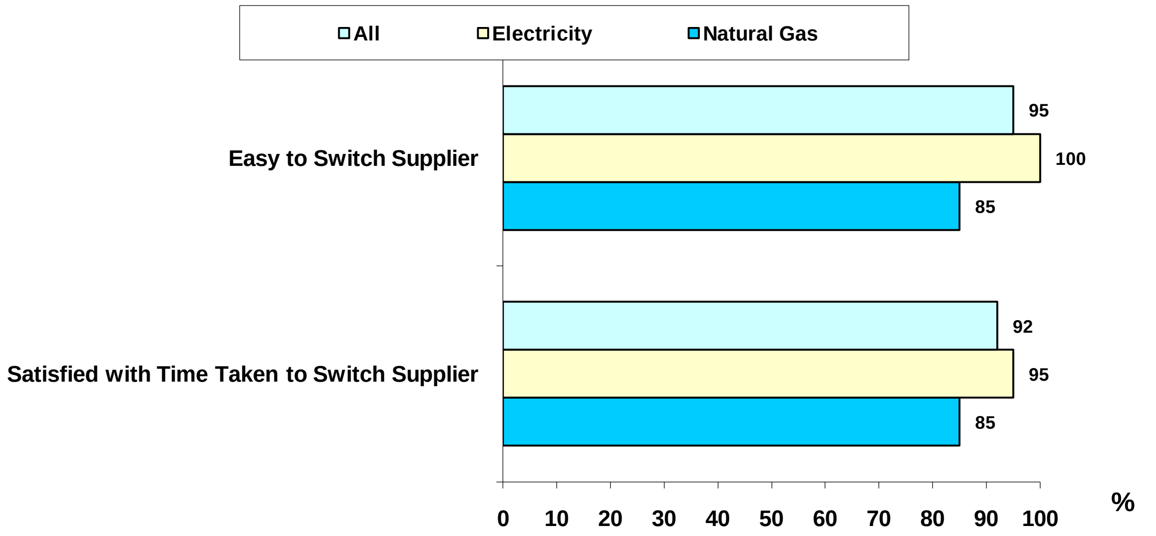
Figure 13: What method(s) did you use to switch supplier? (n=60)



2.6.6 Experience of Switching Supplier

The overwhelming majority (95%) of those who had switched their main energy supplier found it easy to do so, with a similar number satisfied (92%) with the time taken to switch supplier.

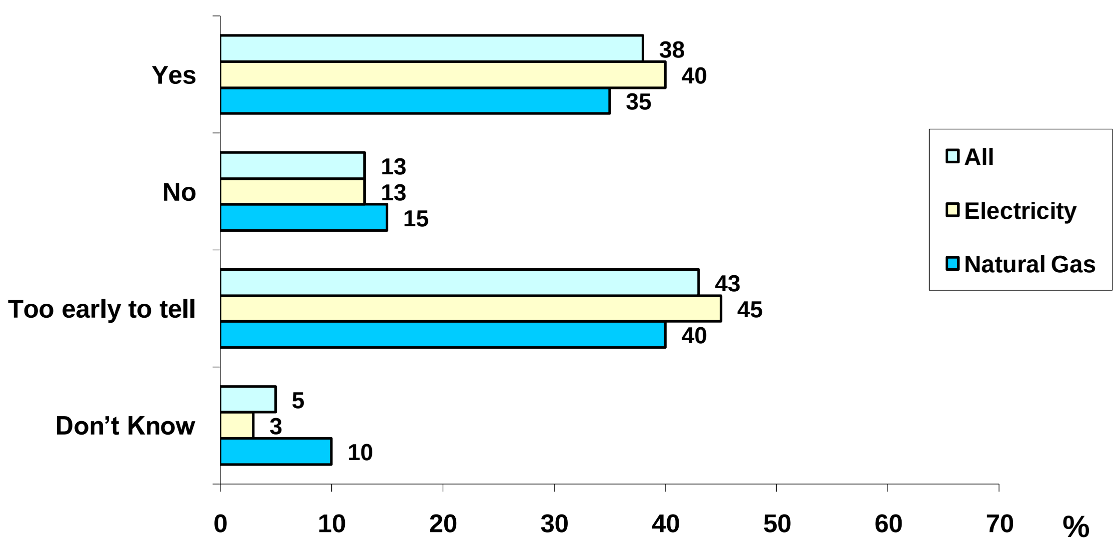
Figure 14: How easy or difficult was it to switch supplier? (n=60)



2.6.7 Actual Financial Saving by Switching Supplier

More than one third (38%) of customers who had switched their main energy supplier in the last year said that they have saved money as a result, with little difference between electricity and natural gas customers. The perception among those who indicated a saving, the average saving was 14% (electricity, 15.5%: natural gas, 7.5%).

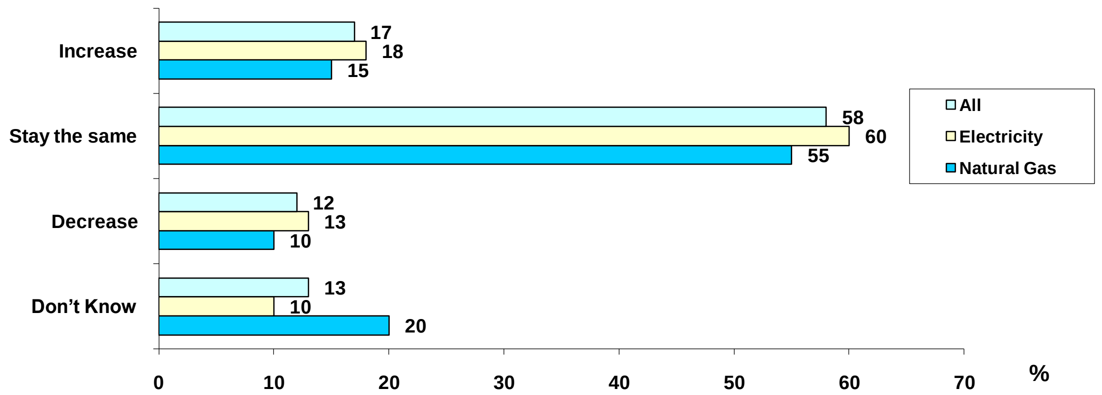
Figure 15: Do you feel you have saved money as a result of switching supplier? (n=60)



2.6.8 Expectation of Price Changes with New Supplier

Having switched supplier, the common expectation is that prices will remain the same (58%), with 60% of electricity customers holding this view compared with 55% of natural gas customers. 17% of customers believe that prices will increase with 12% of the opinion that prices will decrease.

Figure 16: Now that you have switched to a new supplier, do you expect their prices to increase, decrease or stay the same? (n=60)



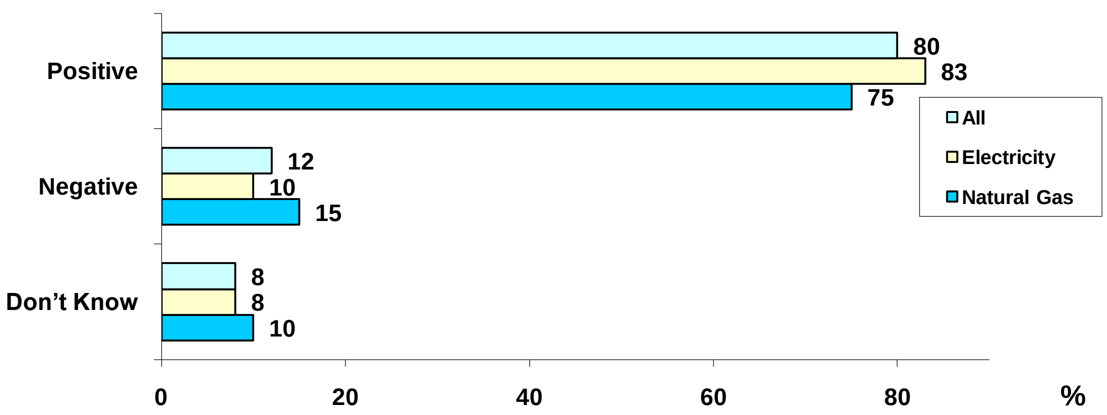
2.6.9 General Experience of Switching Supplier

Most customers switching energy supplier have found the experience a positive one (80%) with 12% finding it negative and 8% recording 'don't know'. There was no significant difference in response between electricity and natural gas customers.

Among those who specified a reason (n=47) why their experience had been positive, 66% said it had been quick and easy / problem free, 15% said they have saved money and 9% said they have got a good service.

The reasons (n=7) why respondents said the experience had been negative included: bad experience (n=1); don't like it (n=1); hassle (n=2); meter breaks (n=1); poor communication (n=1); and, the first bill was bigger than expected (n=1).

Figure 17: Generally has your experience of switching supplier been positive or negative? (n=60)



2.6.10 Main Benefit of Switching Supplier

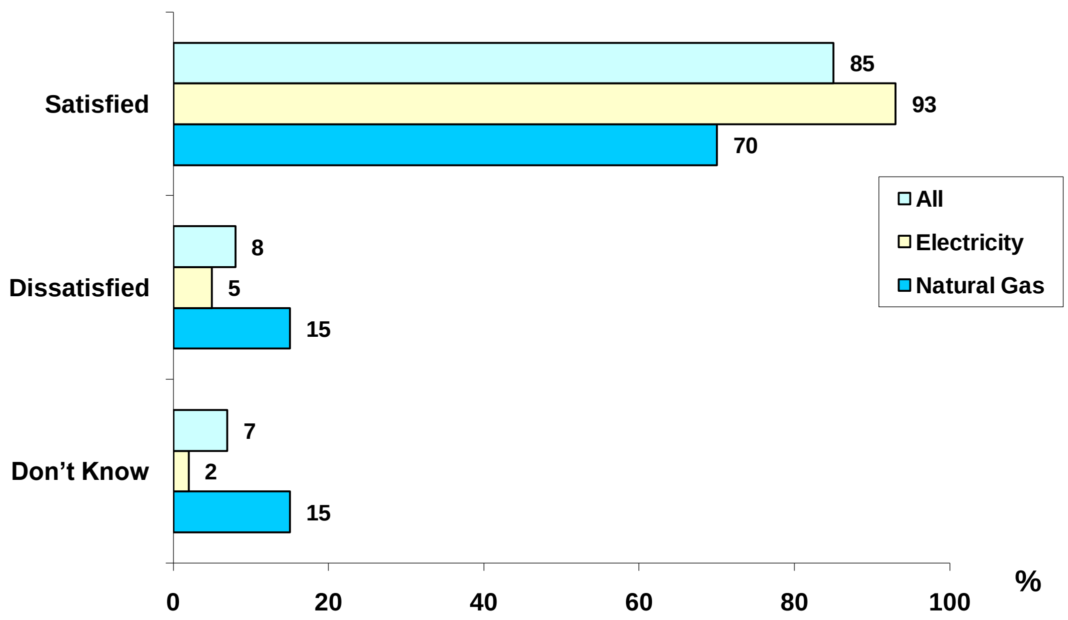
For more than three quarters of respondents who switched their main energy supplier in the last 12 months, the main benefit has been the financial saving (77%), with 13% reporting an improved service. There was little difference in response between electricity and natural gas customers, with 80% of electricity customers identifying financial savings as the main benefit compared with 70% of natural gas customers. Better service was reported by 15% of natural gas customers compared with13% of electricity customers.

In eight out of 10 cases (80%) those who had switched main energy supplier said that they would recommend others to do so, with no significant variation by customer type (electricity, 83%: natural gas, 75%). The reasons for not recommending switching energy supplier to others included: bad experience (n=1); not liking the new product (n=1); hassle (n=1); not a good idea (n=1); very time consuming to make the switch (n=1); too early to say as haven't received first bill yet (n=1); and, don't know (n=2).

2.6.11 Satisfaction with Service Provided by New Supplier

Respondents were asked if the service provided by their new supplier met their expectations. In response, 85% said they are satisfied (32% very satisfied: 53% satisfied) that the service meets their expectations with 8% dissatisfied and 7% recording don't know. Although electricity customers were more likely to be satisfied (93%) compared with natural gas customers (70%), this difference was not statistically significant.

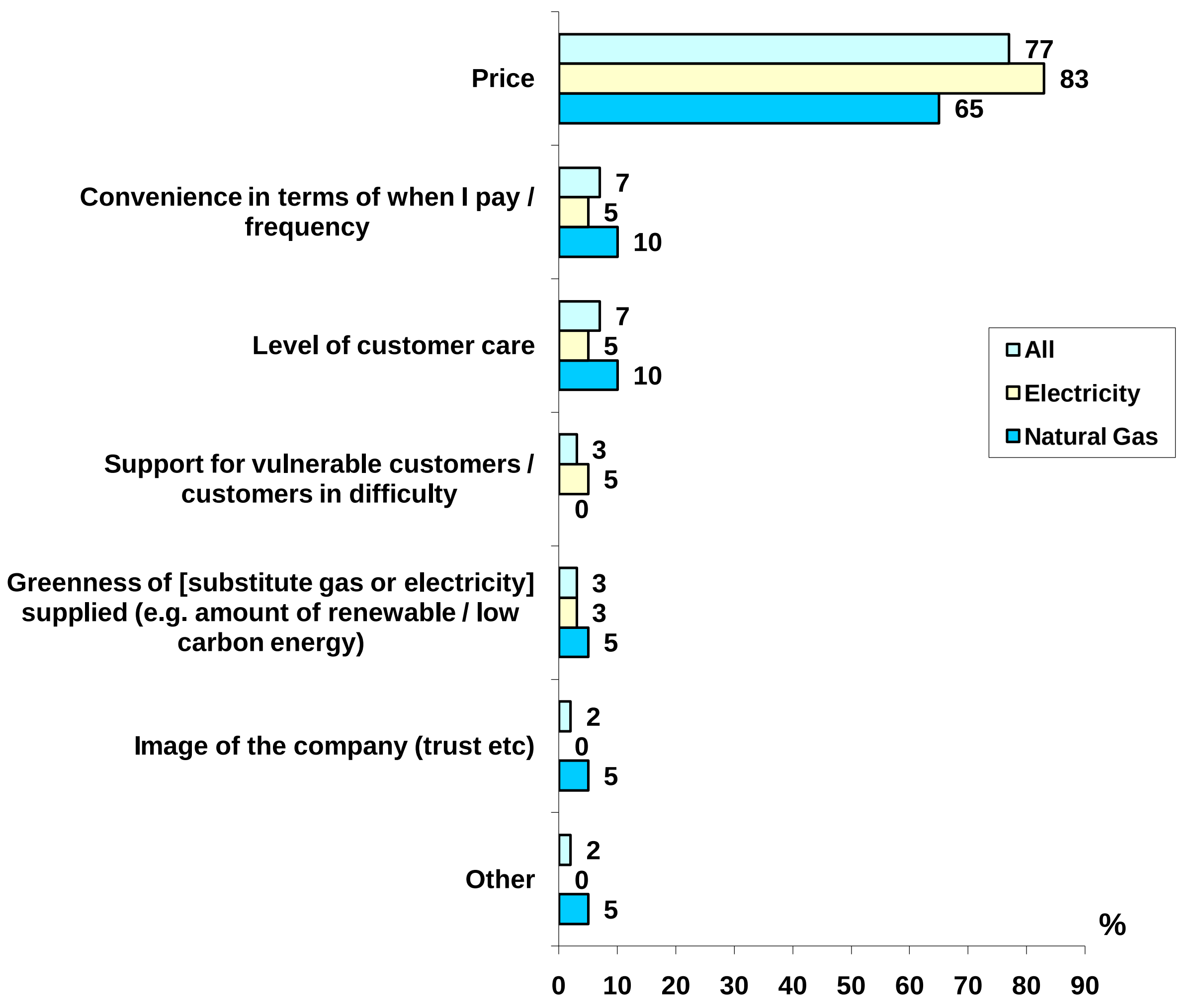
Figure 18: When you switched supplier, were you satisfied or dissatisfied that the service provided by your new supplier met your expectations? (n=60)



2.6.12 Most Important Factors in Choosing a New Supplier

Respondents were presented with 7 factors and asked to rate each in terms of importance in choosing a new energy supplier. Price was the factor ranked highest by respondents (77%), followed by convenience related to payment (7%) and customer care (7%). There was little difference in ranked importance of the various factors between electricity and natural gas customers [note that one customer cited ease of use as the most important factor].

Figure 19: When choosing a supplier, please say which of the following 7 factors is most important. (n=60)



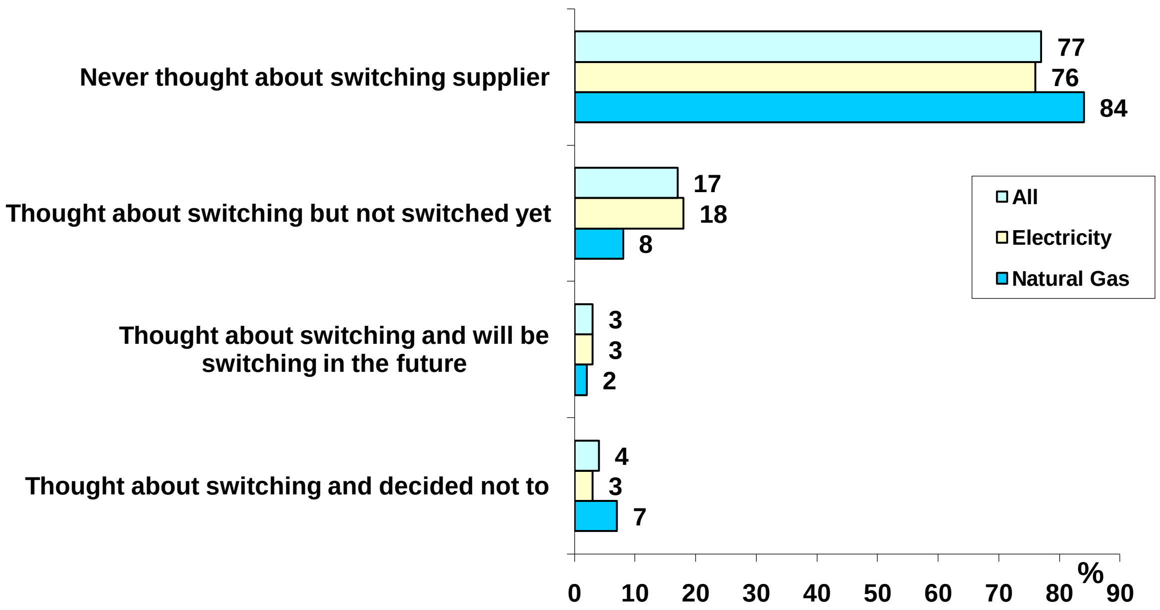
2.7 Non Switchers

The vast majority of respondents in the survey had not switched main energy supplier in the previous 12 months, with non switchers less likely to have household access to the internet (3% vs. 6%).

2.7.1 Ever Consider Switching Energy Supplier

Amongst respondents who have not switched main energy supplier in the previous year, most (77%) have never thought about switching, with natural gas customers less likely to have thought about switching compared with others (84% vs. 76%). Overall, 17% had thought about switching but have yet to do so, with 4% having thought about it deciding against doing so.

Figure 20: Have you ever thought about changing your supplier? (n=1122)



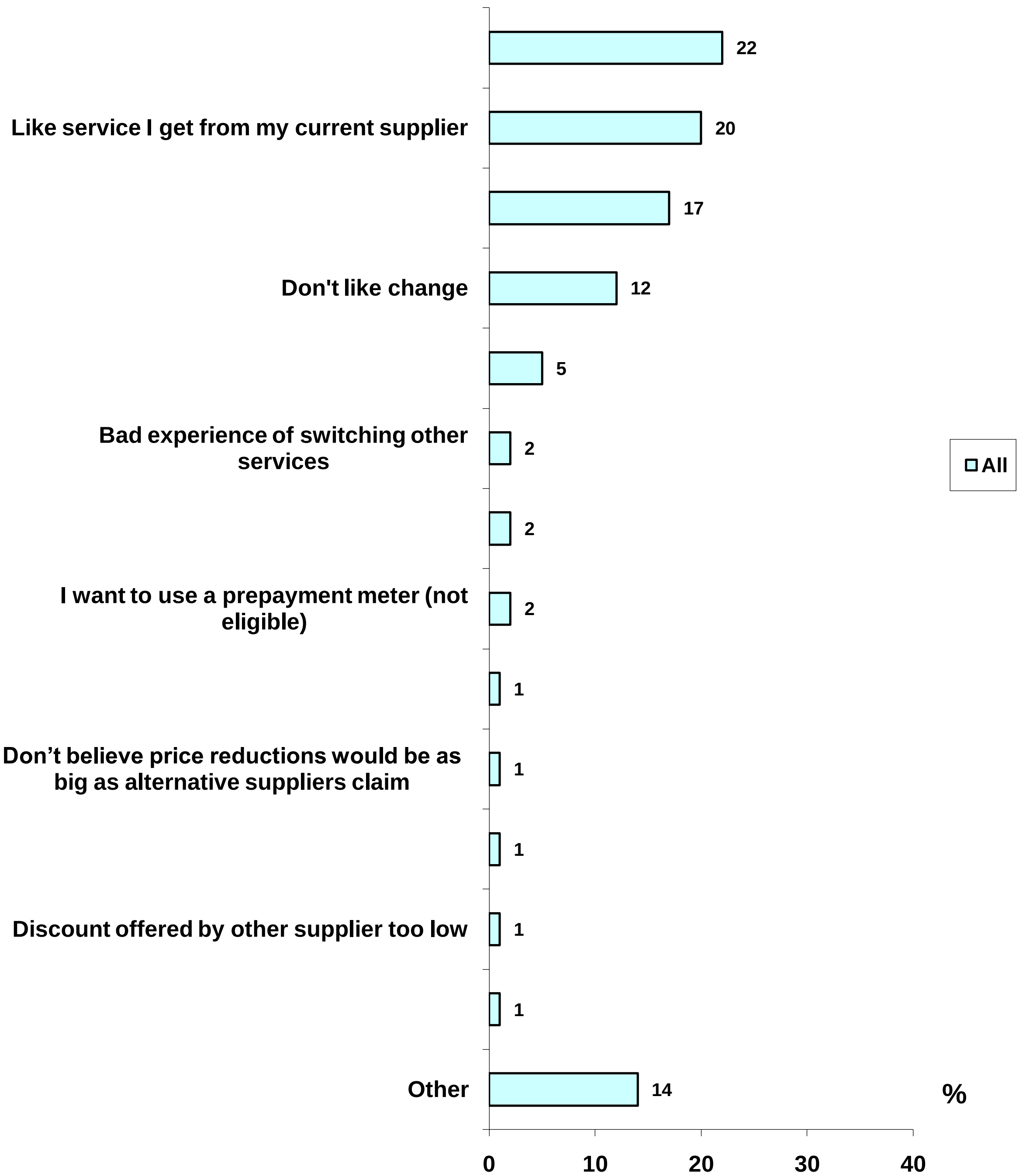
Those **more likely** to have thought about switching supplier were:

- Aged 30-49 (27%) compared with other age groups (16-29, 17%: 50-64, 24%: 65+, 17%);
- Live in rural areas (28% vs. 21%);
- Owner occupiers (27%) and private rented sector tenants (22%) compared with those living in social housing (12%);
- Have household access to the internet (25% vs. 16%);
- Be non natural gas customers (24% vs. 16%);
- Know that it is possible to switch electricity supplier in Northern Ireland (33% vs. 10%);
- Have had experience of switching other service providers (29% vs. 14%).

2.7.2 Main Reason for Not Switching Energy Supplier

In an unprompted question, the most common reason why customers have not switched their main energy supplier was that they are too busy to get around to it (22%), with 20% preferring the service they get from their existing supplier and 17% seeing it as too much hassle. There was no significant variation in response between natural gas and non natural gas customers.

Figure 21: What is the main reason why you have not switched supplier yet? (n=1129)



2.7.3 Anticipated Level of Discount to Encourage Switching Energy Supplier

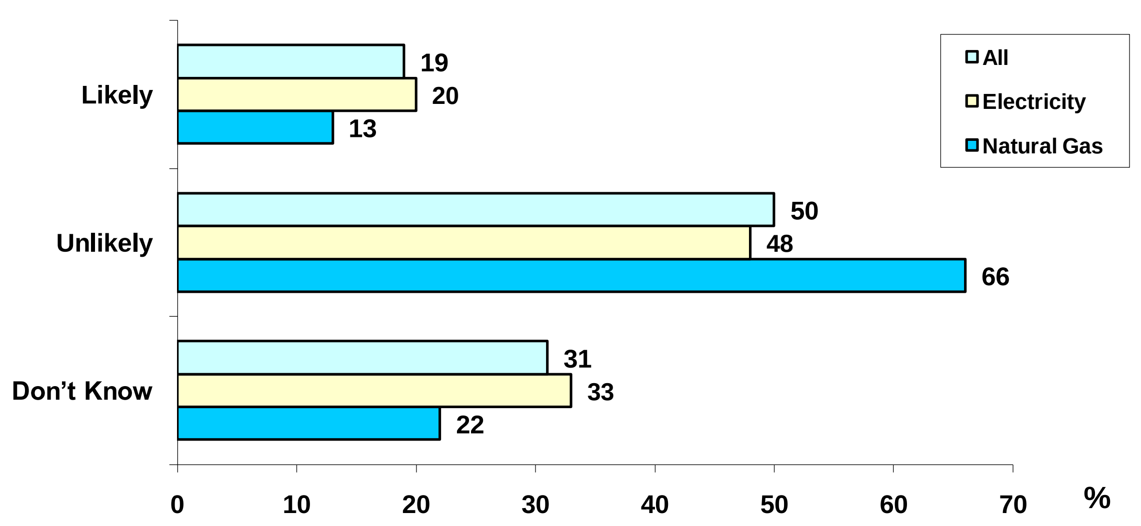
All respondents who had not switched supplier were asked what level of discount, in percentage terms, would encourage them to switch. Approximately one third (37%) of customers didn't know what level of discount would encourage them to switch. However, among those who did specify a level of discount, the average was 28% (ranging from 5% to 100%). There were a number of statistically significant differences in response:

- Natural gas customers would expect a higher level of discount compared with electricity customers (35% vs. 27%);
- Older (aged 65+, 32%) and younger respondents (aged under 30, 31%) expect a higher level of discount compared with other age groups (30-49, 26%: 50-64%, 28%);
- Single respondents (31%) expect a higher level of discount compared with others;
- Respondents with a higher level of educational attainment (33%) expect a higher level of discount compared with others;
- Belfast residents expect a higher level of discount (34%) compared with other residents (26%);
- Those with previous experience of switching other service providers expect a higher level of discount (31% vs. 24%);

2.7.4 Likelihood of Switching Supplier in the Future

Almost one in five (19%) respondents said they would be likely to switch their main energy supplier in the future, with half (50%) saying they are unlikely to switch. Approximately three out of ten (31%) respondents are undecided.

Figure 22: How likely or unlikely is it that you will switch supplier in the future? (n=1131)

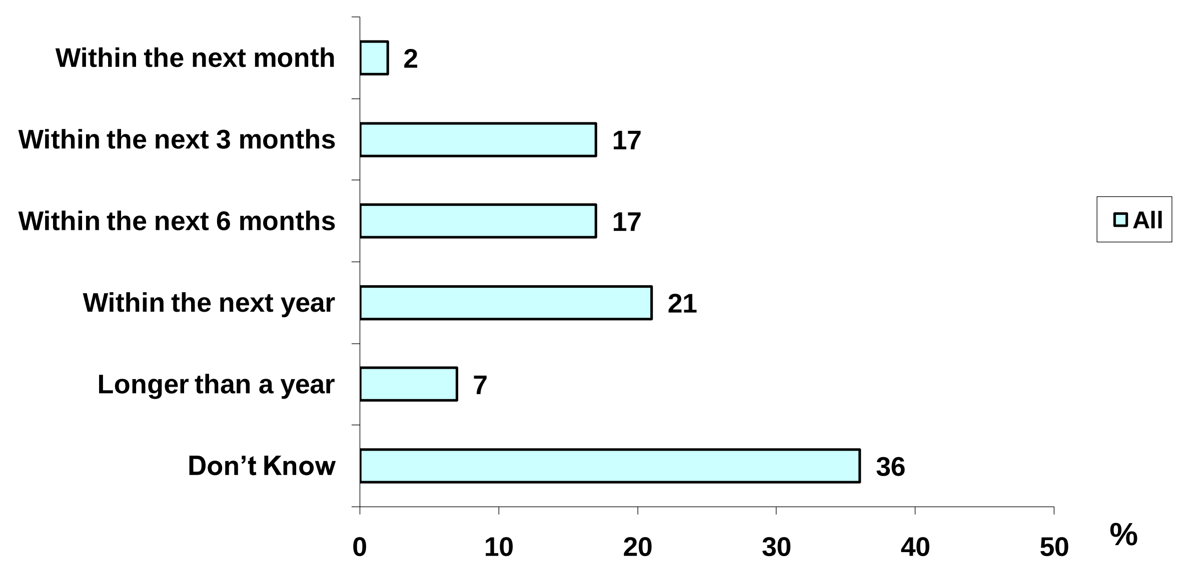


Those who said they are **likely** to switch in the future were:

- Women (21%) compared with men (16%);
- Aged 30-49 (23%) compared with other age groups (16-29, 19%: 50-64, 16%: 65+, 10%);
- Those with dependents (25% vs. 14%);
- Live in rural areas (23% vs. 18%1);
- Owner occupiers (21%) and private rented sector tenants (19%) compared with those living in social housing (12%);
- Have household access to the internet (21% vs. 13%);
- Be non natural gas customers (20% vs. 13%);
- Know that it is possible to switch electricity supplier in Northern Ireland (23% vs. 13%);
- Be living in areas outside Belfast (20% vs. 15%);
- Have had experience of switching other service providers (23% vs. 13%).

Respondents who indicated that the are likely to switch supplier in the future were asked when they are likely to switch, with 36% undecided, 19% within the next three months, 36% within the next 6 months and 57% in the next year. There was no significant difference in response between natural gas and other customers.

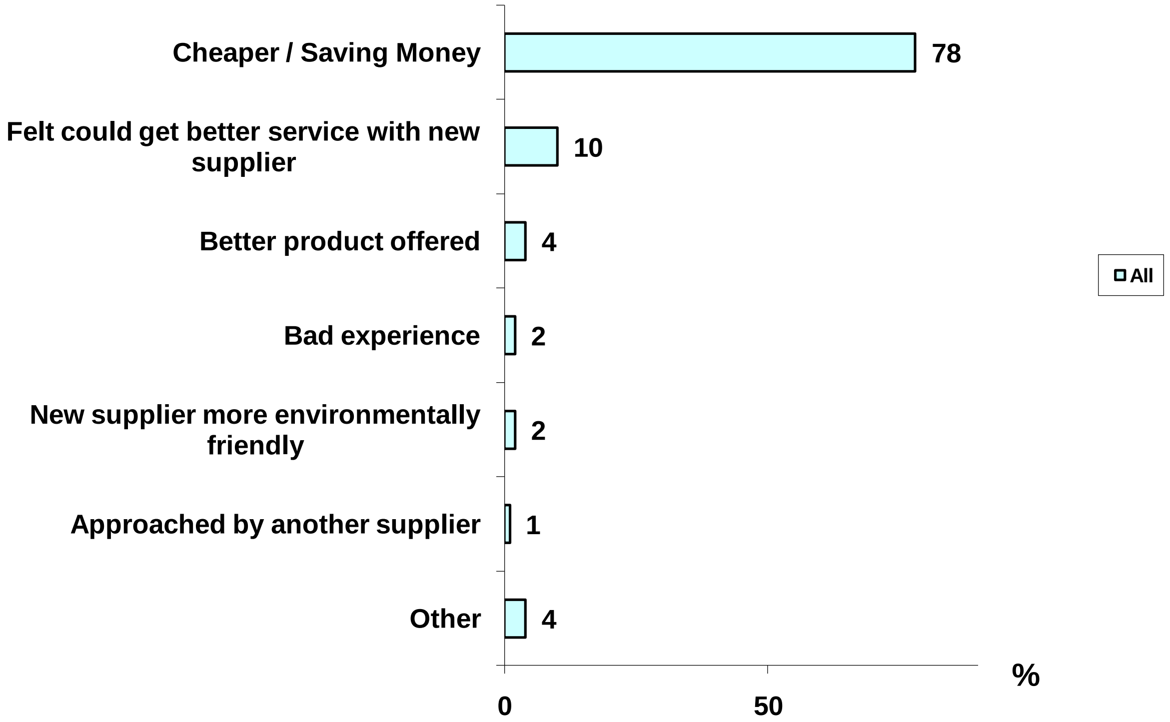
Figure 23: When are you likely to switch supplier? (n=211)



2.7.5 Main Reason Likely to Switch Supplier in the Future

Saving money was the main reason (78%) why respondents said they would be likely to switch supplier in the future, with better service cited by 10%, and a better product by 4%. There was no significant variation in response between natural gas and electricity customers.

Figure 24: What is the main reason why you are likely to switch supplier in the future? (n=211)



2.7.6 Supplier Incentive to Switch

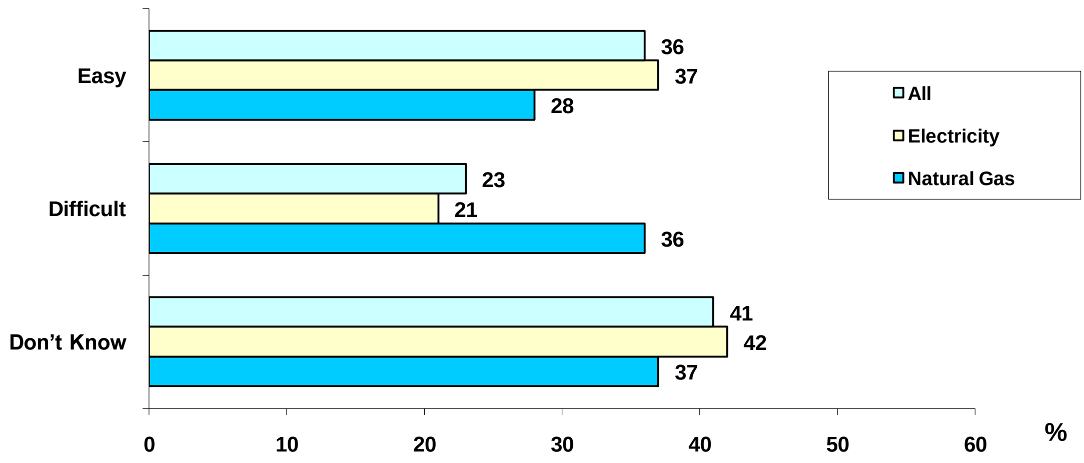
Respondents were asked what a supplier would need to offer them to encourage them to switch supplier tomorrow. Of the respondents who answered this question, 64% cited cheaper or discounted prices, with 4% citing the removal of all hassle / problems associated with switching. Two percent of respondents referred specifically to guaranteeing that any saving would be sustained.

2.7.7 Perceived Difficulty in Switching

The survey also sought to gain some understanding of customer perception of the level of difficulty associated with switching main energy supplier. Overall 36% believe switching would be easy with 23% of the view that it would difficult. A significant proportion of respondents (41%) recorded 'don't know' when asked to comment on the perceived level of difficulty associated with switching energy supplier. Natural gas customers were more likely to say that switching would be difficult (36% vs. 21%).

Those who feel that it would be difficult to switch supplier were prompted further as to why it would be difficult, with most of this group (69%) of the view that it would be too much hassle (includes changing meter, paperwork, too much mess etc).

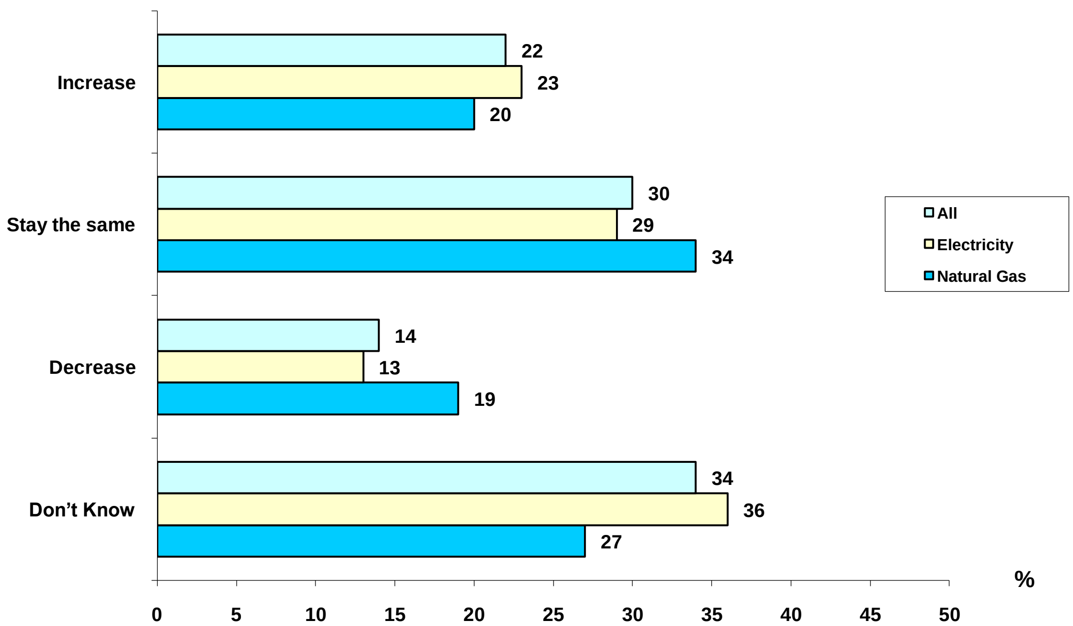
Figure 25: How easy or difficult do you think it would be to switch supplier? (n=1128)



2.7.8 Anticipated Change in Prices if Switched Supplier

If customers were to switch, approximately one fifth (22%) would anticipate an increase in price over the next year, with 14% anticipating a decrease and 30% no change. Around one third (34%) of respondents were unsure how prices would change in the next year if they switched supplier.

Figure 26: If you did switch supplier do you think prices with the new supplier would increase, decrease or stay the same over the next year? (n=1131)



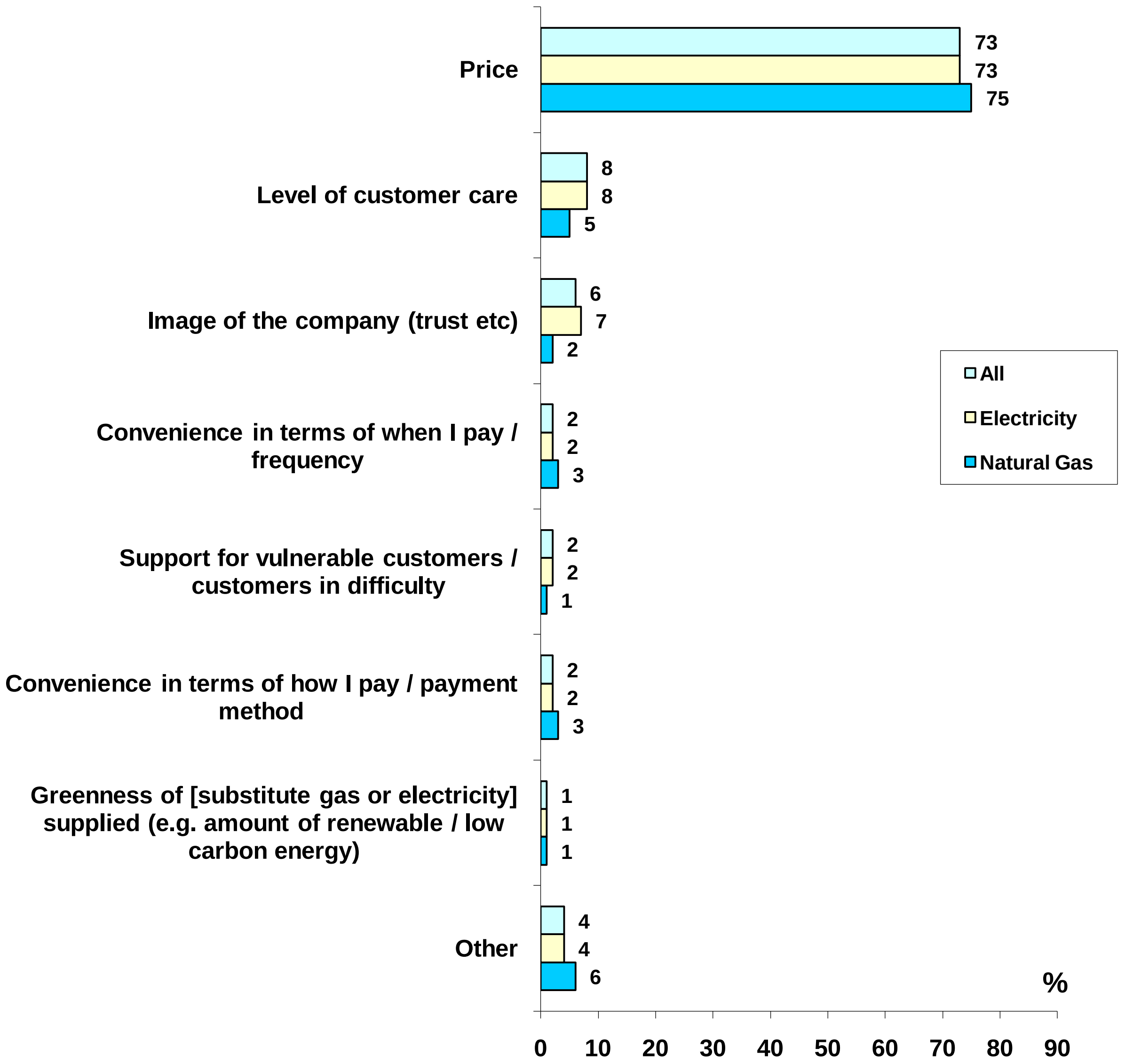
Natural gas customers were more likely to anticipate a decrease in price (19% vs. 13%, with a slightly greater proportion of electricity customers anticipating an increase in price (23% vs. 20%).

2.7.9 Most Important Factors in Choosing a New Supplier

Among respondents who have not switched main energy supplier in the last year, price is the factor (73%) most important to them when choosing a supplier, followed by level of customer care (8%) and image of the company (6%).

Natural gas customers were more likely to identify price and convenience of payment terms as the most important factors, whereas electricity customers were more likely to cite level of customer care and company image.

Figure 27: When choosing a supplier, of the following 7 factors which do you feel is most important. (n=1131)



Among those respondents (n=51) who mentioned other factors as being important, 18% (n=9) cited reliability, 20% (n=10) said all factors are important, and 8% (n=4) said it was their parents choice (i.e. living with their parents).

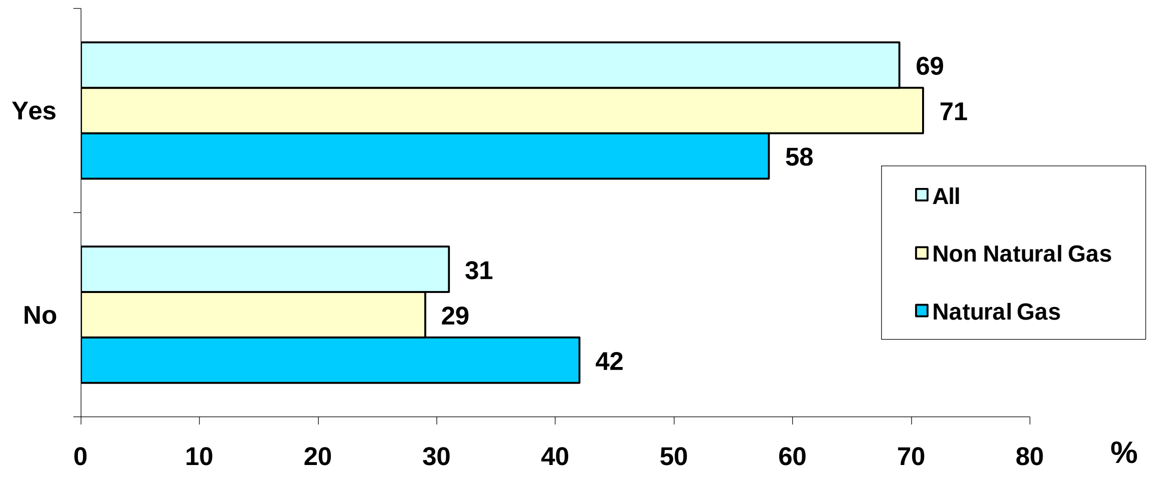
2.8 Customer Information Requirements

This section of the report presents the views of respondents on the provision of information by energy companies as well as identifying gaps in information provision. The analysis in this section is based on weighted data to control for the over sampling of natural gas customers.

2.8.1 Receiving Bills from Energy Suppliers

Approximately seven out of ten customers (69%) said that they receive a bill from their main energy supplier, with electricity customers significantly (71%) more likely to receive a bill compared with natural gas customers (58%).

Figure 28: Do you received a bill from your main energy supplier? (n=1203)



In most cases (73%) those who receive a bill from their energy supplier open it every time they receive it, with 18% opening it sometimes and 9% never.

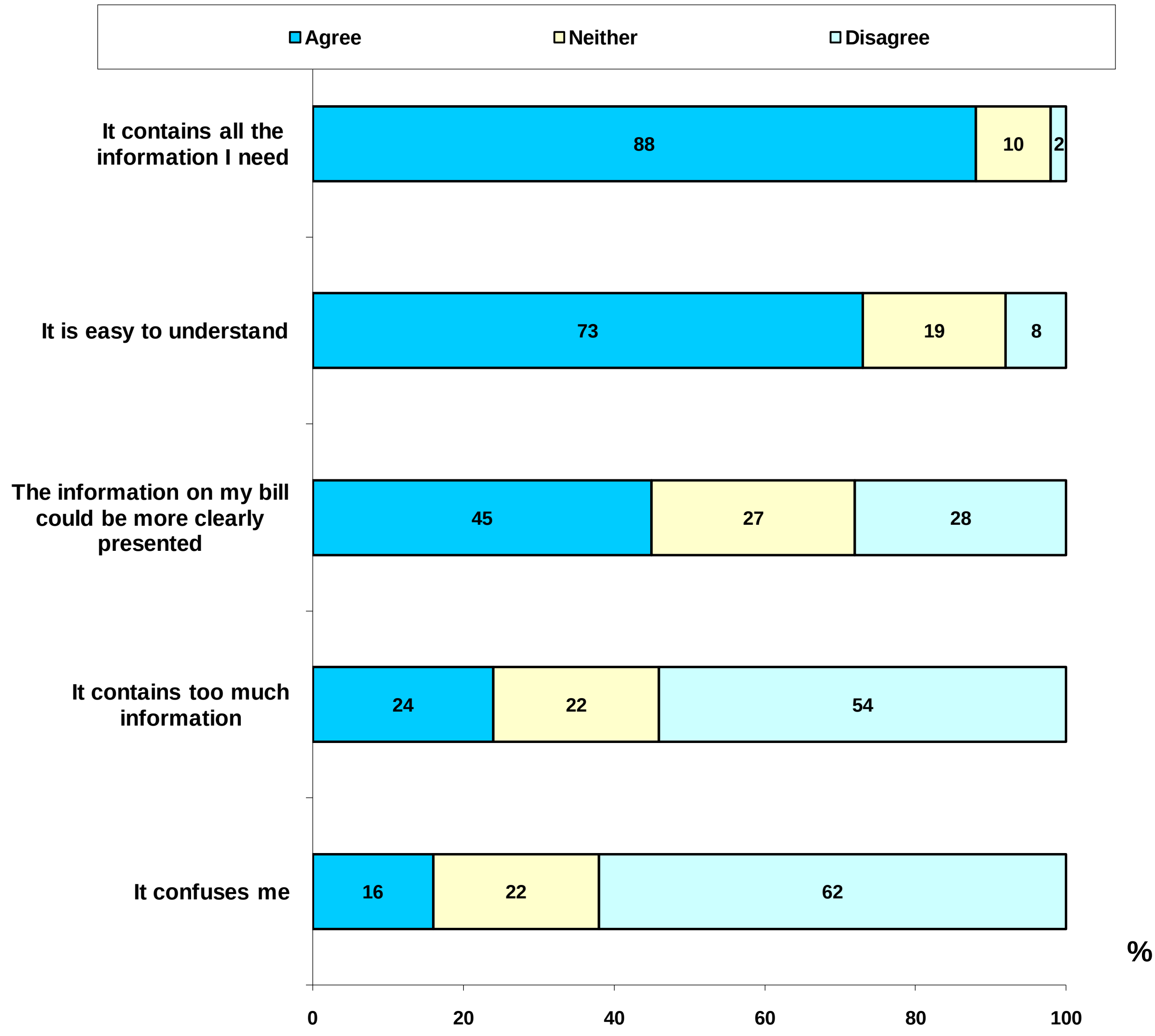
Groups more **likely** to report opening (always or sometimes) their bill included those:

- Aged 50-64 (81%) compared with other age groups (16-29, 55%: 30-49, 78%: 65+, 69%, $p<=0.001$);
- With dependents (78% vs. 70%);
- Living in rural areas (81% vs. 72%, $p<=0.01$);
- Living in areas outside Belfast (79% vs. 55%);
- Owner occupiers (77%) compared with private rented sector tenants (67%) and those living in public housing (65%, $p<=0.01$); and,
- Non natural gas customers compared with others (80% vs. 69%).

2.8.2 Information Contained within Bills from Energy Suppliers

Respondents who receive and open the bill from their main energy supplier were asked to comment on different aspects of their bill. Most of these respondents said that their bill contains all of the information they need (88%) with 73% finding it easy to understand. More than four out of ten (45%) respondents feel that the information on their bill could be more clearly presented, with a minority of respondents believing that their energy bill contains too much information (24%) and that it is confusing (16%).

Figure 29: Thinking about your bill, please say whether you agree or disagree with the following statements? (n=757)



There were a number of statistically significant differences in response:

Bill Contains All the Information I Need

- Respondents educated to degree level or equivalent, were less likely to agree (83%) compared with other groups.

Bill Contains Too Much Information

- Higher level of agreement among younger respondents (34%);
- Higher level of agreement among respondents in social classes C2DE (27%) compared with those in social classes ABC1 (21%);
- Belfast residents more likely to agree (32%) compared with residents in other areas (21%);

Bill is Easy to Understand

- Non natural gas customers were more likely to agree (75%) compared with natural gas customers (62%);

Bill Confuses Me

- Higher level of agreement among social classes C2DE (20%) compared with those in social classes ABC1 (12%);
- A higher level of agreement among those in public sector housing (28%) compared with owner occupiers (14%) and those living in private rented accommodation (19%);
- A higher level of agreement among natural gas customers (26% vs. 15%).

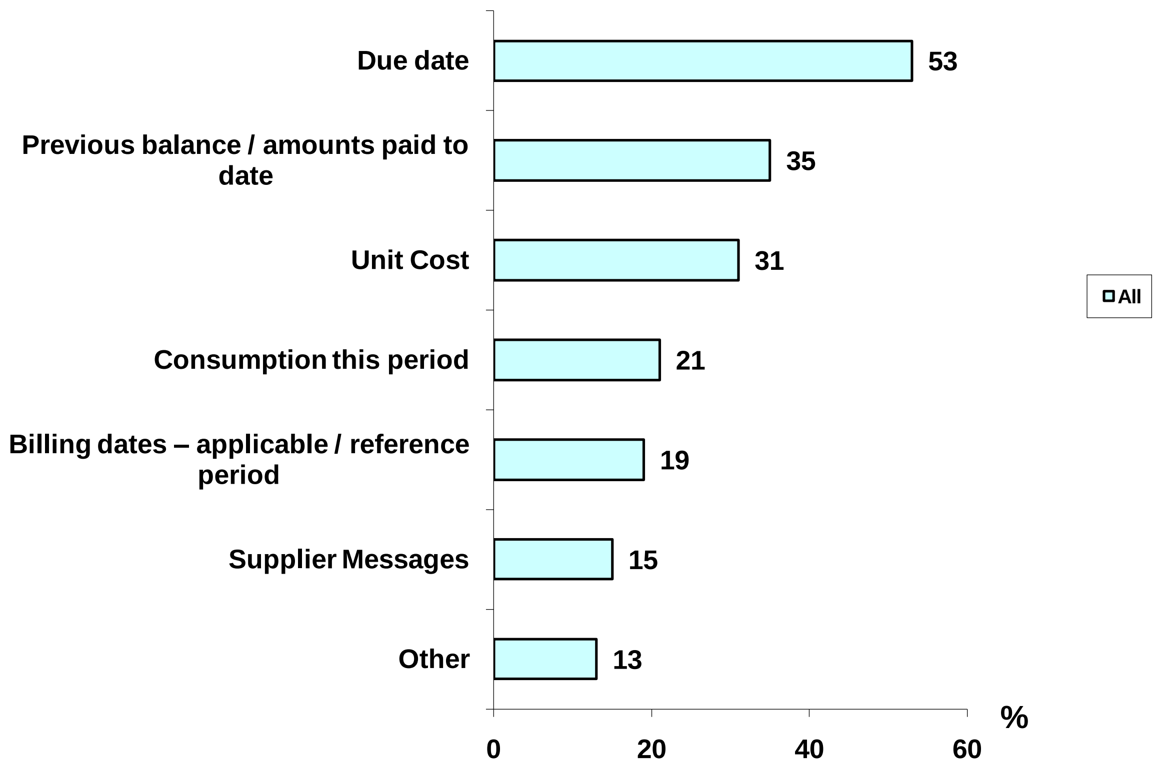
Information on My Bill Could Be More Clearly Presented

- Higher level of agreement among social classes C2DE (48%) compared with those in social classes ABC1 (42%);
- A higher level of agreement among natural gas customers (58% vs. 43%).

2.8.3 Read Aspects of Bill from Energy Supplier

In most cases, those who read their bills read the total amount due (80%) with most also reading the due date for payment (53%). Note that 'other' included reading information related to: comparison of consumption with same period last year, 3%; ways to pay the bill, 3%; ccustomer service information / contact details, 3%; consumer rights / support information / contact details, 2%; and, fuel mix, 1%). There was no significant difference between natural gas and non natural gas customers and reading specific aspects of their bills.

Figure 30: Thinking about your bill, do you read the following? (n=757)

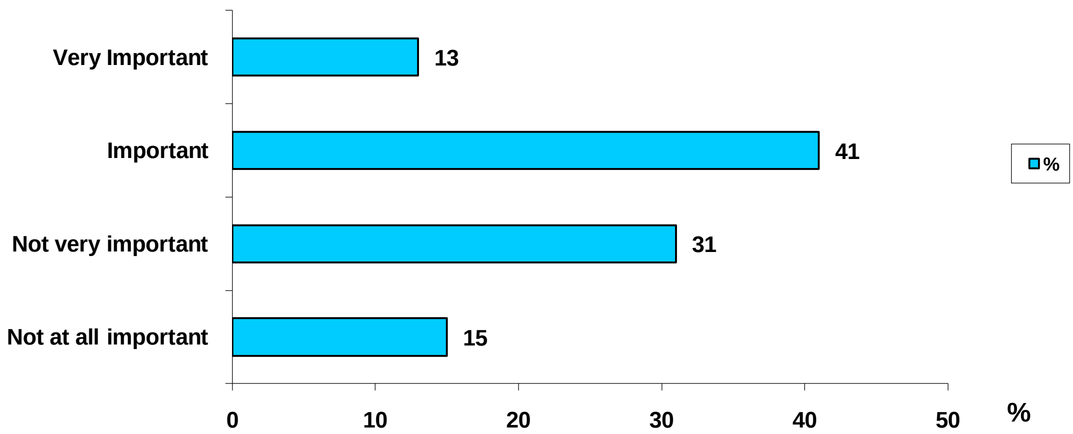


2.8.4 Electricity Customers and Receipt of Information on Carbon Content

The majority (54%) of non natural gas customers who receive a bill from their energy supplier said it is important (13% very important: 41% important) to them personally that information on the environmental impact and carbon content of electricity supplied to them in the previous year is shown on their bill, with the remaining 46% saying that providing this information on their bill is not important (31% not very important: 15% not at all important).

Those in higher social classes are more likely to view this information as important (ABC1, 61%: C2DE, 46%), with those with no formal educational qualifications (39%) less likely to view such information as important (GCSE or equivalent, 54%; A 'Level or equivalent, 62%; degree or equivalent, 58%).

Figure 31: How important or unimportant is it to you personally that information on the environmental impact and carbon content of electricity supplied to you in the previous year is shown on or with your bill? (n=666)



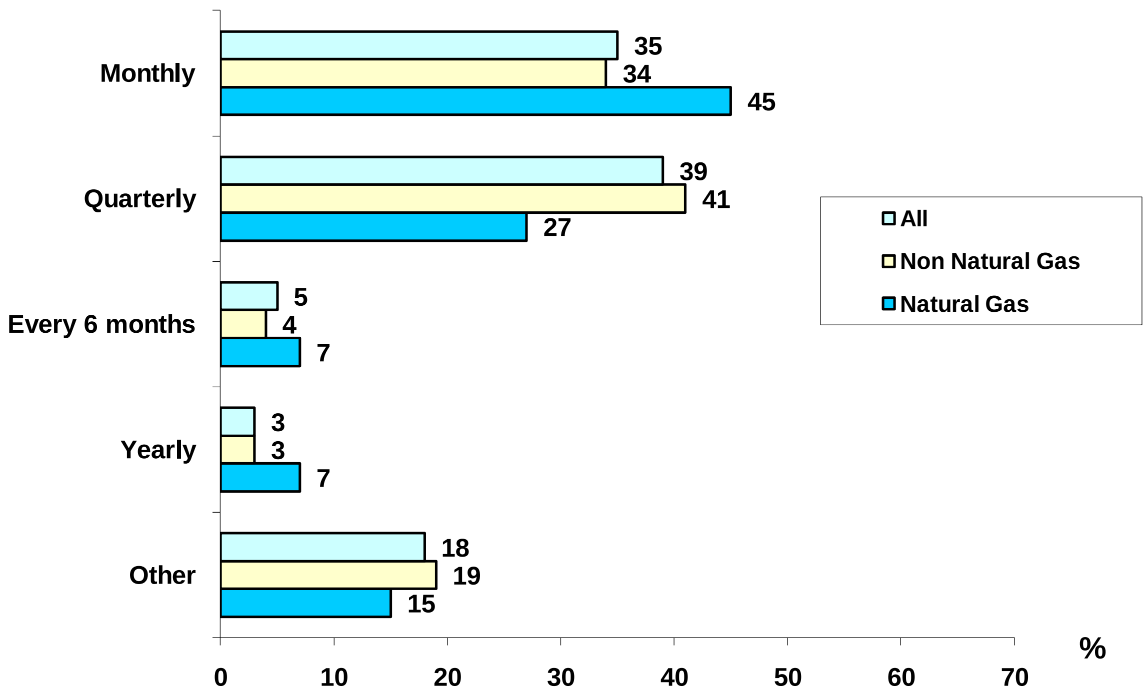
Approximately one in three (34%) non natural gas customers who receive a bill from their energy company know that information on the environmental impact and carbon content of electricity supplied to them in the previous year is shown on or with their bill. Residents in Belfast (43%) were more likely to be aware of such information compared with others (32%).

Of those non natural gas customers who receive a bill from their energy company and who are aware that it contains information on the environmental impact and carbon content, most (53%) said they find this information easy to understand with 24% finding it difficult. 18% said that they have never read this information with 5% recording 'don't know' when asked if they find such information easy or difficult to understand.

2.8.5 Preference for Receiving Bills from Energy Suppliers

Among all customers, 35% prefer to receive a monthly bill from their energy supplier, with 39% preferring to be billed quarterly, 5% every 6 months, 3% yearly and 18% at other intervals. Proportionately more natural gas customers preferred to receive bills on a monthly basis whereas proportionately more non natural gas customers preferred to receive bills on a quarterly basis.

Figure 32: How often would you like to receive your bill? (n=1203)



2.8.6 Receiving Bills from Energy Suppliers in Different Formats

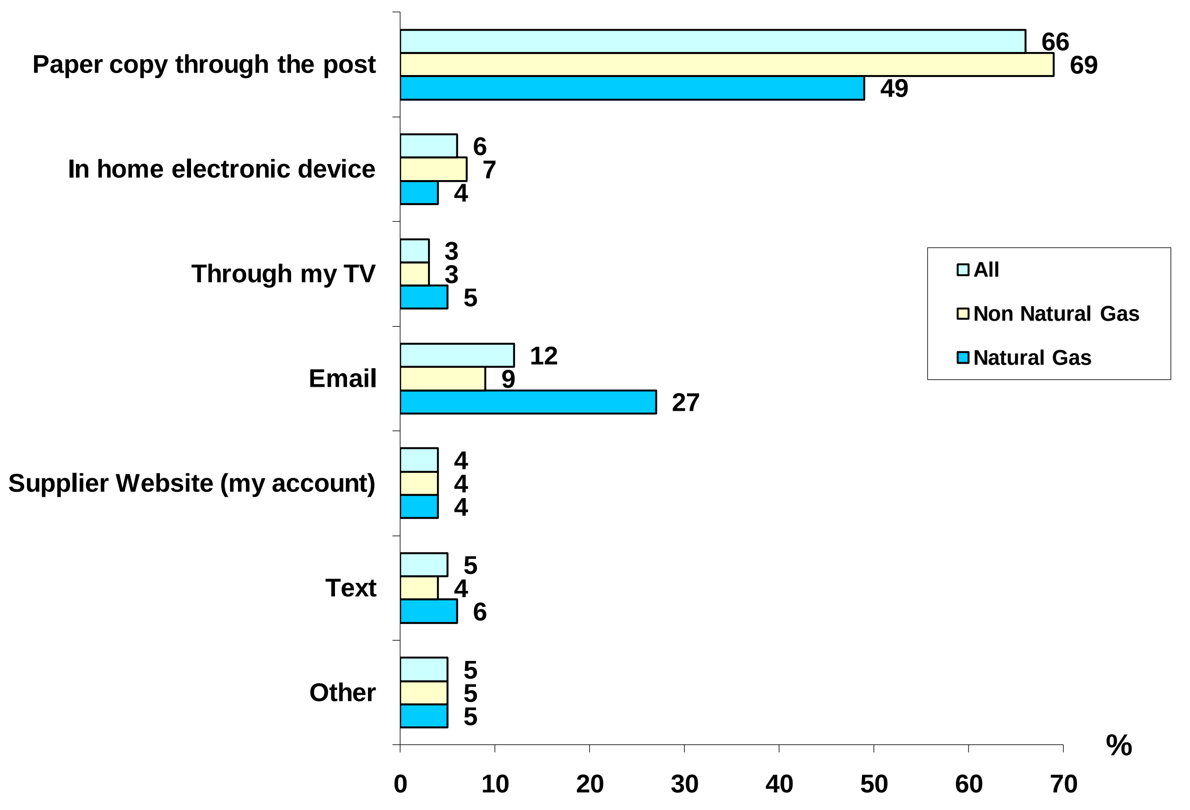
The majority (66%) of respondents prefer to receive their energy bill in paper copy format through the post, with 12% preferring email, 6% via an in-home electronic device, 5% via text message and 4% by accessing their account through their supplier's website.

Compared with other age groups, younger respondents (aged under 30) were more likely to prefer receiving their energy bill by email (18%) and text message (9%), and less likely to express a preference for paper copy through the post (51%). By comparison, older respondents (aged 65+) were more likely to prefer their bill in paper copy format through the post (81%).

Social class was also found to be significant with ABC1 respondents (14%) more likely to express a preference for email compared with their C2DE counterparts (10%). Also those with household access to the internet were more likely to prefer email (14% vs. 4%) and accessing their account via their suppliers website (5% vs.

1%). Finally, in relation to educational attainment level those educated to degree level or equivalent were more likely to express a preference for email (20%) and accessing their bill through their suppliers website (5%) whereas those with no formal educational qualifications were more likely to express a preference for their bill to be provided in paper copy format through the post (72%).

Figure 33: Your bill can be provided in different formats. What format would you prefer to receive your bill? (n=1203)



2.8.7 Other Information Customers Would Like to Receive from Suppliers

Just 4% of all customers said that there was other information they would like to receive from their supplier. This included: ways to save money / discounts for existing customers (n=14); where most money is being spent / energy is being used (n=9); profits being made by energy companies (n=6); why customers are charged so much (n=6); number of units used (n=4); contact numbers within companies (n=3); and, options for greener energy (n=3).

Most (58%) of these respondents said that they would like to receive this other information on their bill, with 33% citing leaflets, 8% email, 7% via advertising and 5% by text messaging.

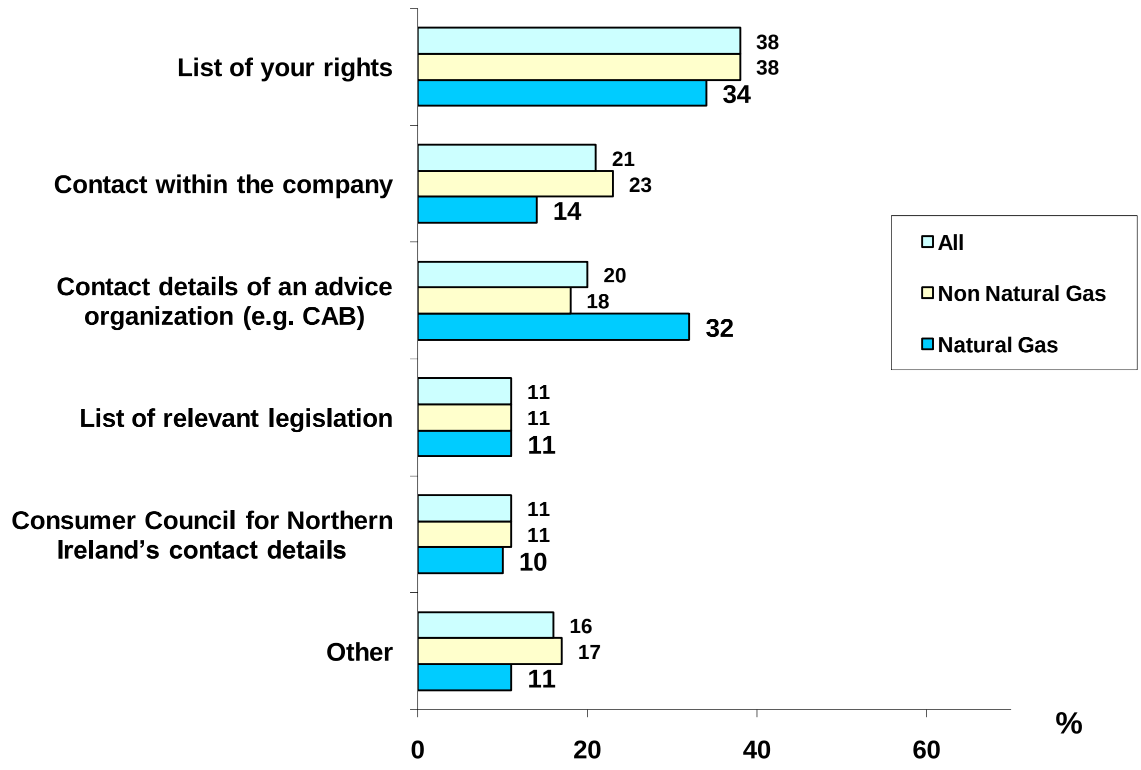
2.8.8 Information on Rights as a Customer of Energy Companies

Less than one in ten (8%) respondents said they need to receive more information on their rights as a customer of energy companies, with 10% saying they need to receive less and 82% satisfied with current provision.

There was no significant variation in response between natural gas and non natural gas customers however those aged 50-64 (12%) were more likely to say that they need more information on their rights (16-29, 3%: 30-49, 9%: 65+, 6%).

All respondents were asked what type of information on their rights would be most useful, with 38% identifying a list of rights, 21% a contact within their energy company and 20% the contact details of an advice organisation.

Figure 34: As a customer what type of information on your rights would you find most useful? (n=1203)

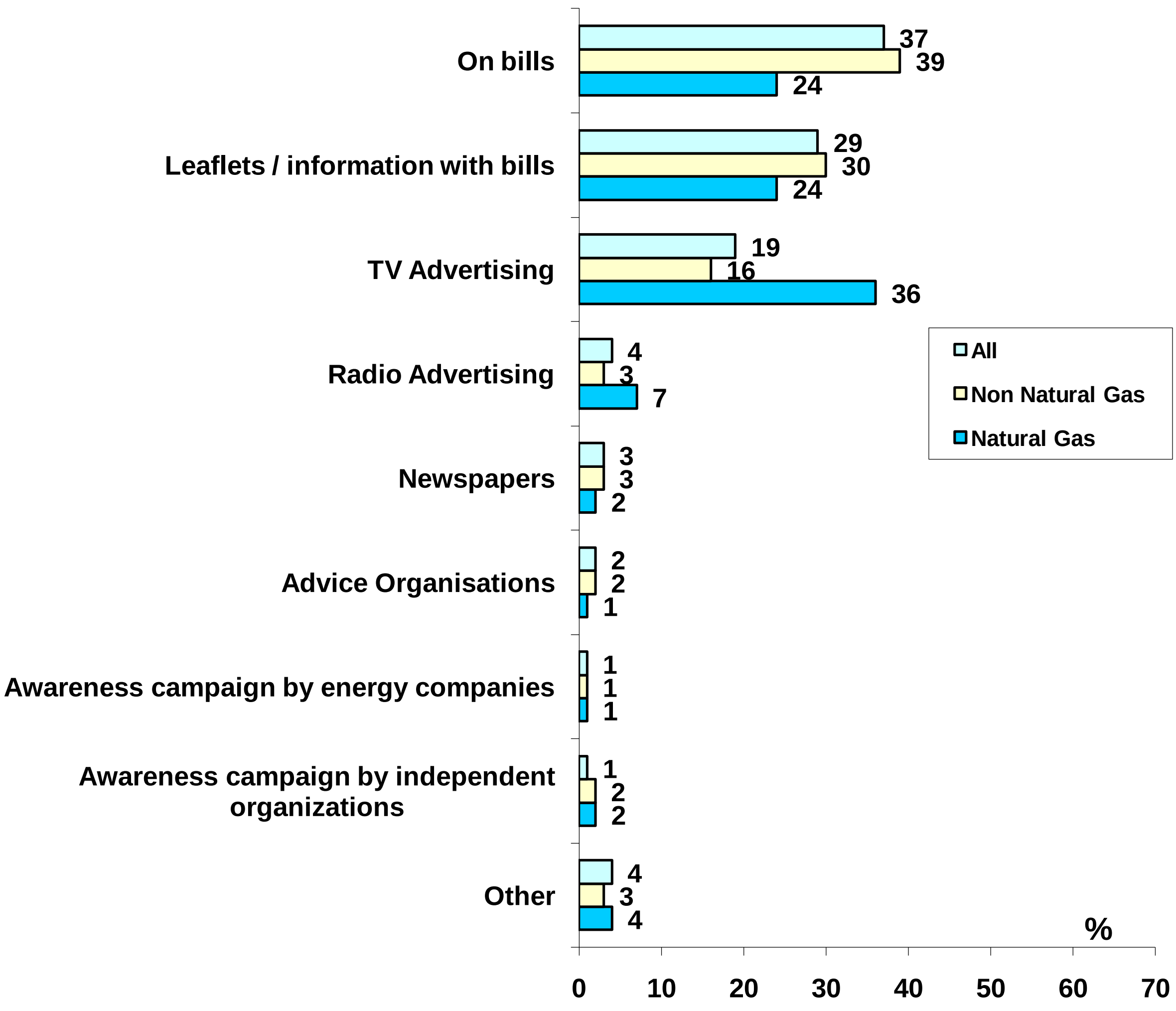


2.8.9 Preference for Receiving Information on Customer Rights from Energy Companies

The most popular way of receiving information on customer rights was on bills (37%), with leaflets / information included with bills cited by 29%. TV advertising is favoured by 19%.

Compared with other customers, more natural gas customers preferred TV advertising, with more non natural gas customers preferring information on customer rights to be provided on their bill, and in leaflets with their bill.

Figure 35: For you what is the best way to receive information on your rights as a customer of energy companies? (n=1203)



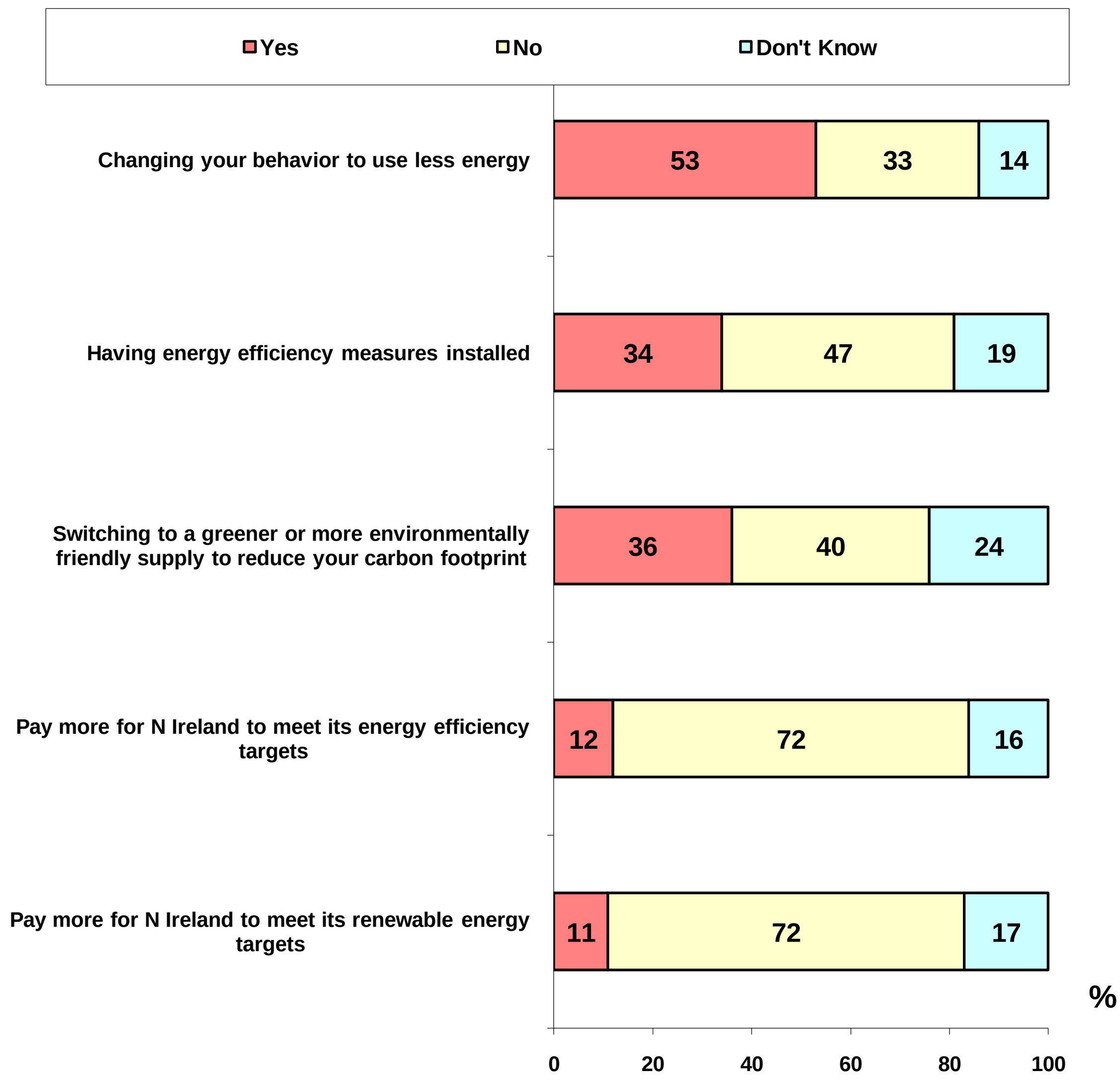
Older respondents (aged 65+, 48%) compared with younger respondents (16-29, 27%) were more likely to prefer information on customer rights to be included on their bill, whereas younger respondents were more likely to prefer TV advertising (26% vs. 12%). Similarly, respondents in higher social classes were more likely to favour receiving information on customer rights on their bill (41% vs. 34%), with those in social classes C2DE more likely to favour television advertising (22% vs. 15%). Analysis by energy type found that natural gas customers compared with others were more likely to favour TV advertising (36% vs. 16%) with non natural gas customers more likely to favour receiving information on customer rights on their bills (39% vs. 24%).

2.9 Energy Efficiency

2.9.1 Attitudes to Energy Efficiency

Respondents were asked a number of questions on energy efficiency. Just over half (53%) of all respondents said in the next year they would consider changing their behaviour to use less energy, with 34% saying they would consider having energy efficiency measures installed and a similar number (36%) saying they would consider switching to a greener or more environmentally friendly supply to reduce their carbon footprint. Approximately one in eight (12%) respondents said that in the next year they would consider paying more for Northern Ireland to meet its energy efficiency targets, with a similar number saying that in the next year they would be willing to pay more for Northern Ireland to meet its renewable energy targets (11%).

Figure 36: Would you consider doing any of the following in the next year? (n=1203)



There were a number of statistically significant differences in response to these questions:

Consider Having Energy Efficiency Measures Installed (in next year)

- Less likely among older respondents (65+, 16%) compared with other age groups (16-29, 29%; 30-49, 43%: 50-64, 34%);
- More likely among owner occupiers (40%) compared with public (25%) and private sector (28%) tenants;
- More likely among those educated to degree level (43%) compared with others;

Consider Changing Your Behaviour to Use Less Energy (in next year)

- Less likely among older respondents (65+, 42%)compared with other age groups (16-29, 49%; 30-49, 61%: 50-64, 52%);
- More likely among those in the higher social classes (ABC1, 56%: C2DE, 51%);
- More likely among owner occupiers (61%) compared with public (35%) and private rented sector (49%) tenants;
- More likely among those educated to degree level (64%) compared with others.

Consider Switching to Greener More Environmentally Friendly Supply to Reduce Carbon Footprint (in next year)

- Less likely among older respondents (65+, 22%)compared with other age groups (16-29, 34%; 30-49, 40%: 50-64, 38%);
- More likely among those in the higher social classes (ABC1, 39%: C2DE, 33%);
- More likely among owner occupiers (39%) compared with public (25%) and private rented sector (35%) tenants;
- More likely among those educated to degree level (51%) compared with others.

Paying More to Help Northern Ireland Meet its Renewable Energy Targets

- More likely among owner occupiers (14%) compared with public (9%) and private rented sector (6%) tenants;
- More likely among those educated to degree level (13%) compared with others

Paying More to Help Northern Ireland Meet its Energy Efficiency Targets

- More likely among those in the higher social classes (ABC1, 13%: C2DE, 10%);

- More likely among owner occupiers (15%) compared with public (9%) and private rented sector (6%) tenants;
- More likely among those educated to degree level (16%) compared with others;

Paying More for Greener Energy

Almost one in five (19%) respondents said that they would be willing to pay more for greener energy, with almost a quarter of those in social classes ABC1 (23%) prepared to pay more compared with 16% of those in social classes C2DE. Owner occupiers are also willing to pay more for greener energy (23%) compared with public (12%) and private rented sector (17%) tenants. Finally, those educated to degree level or equivalent (24%) said they would be willing to pay more.

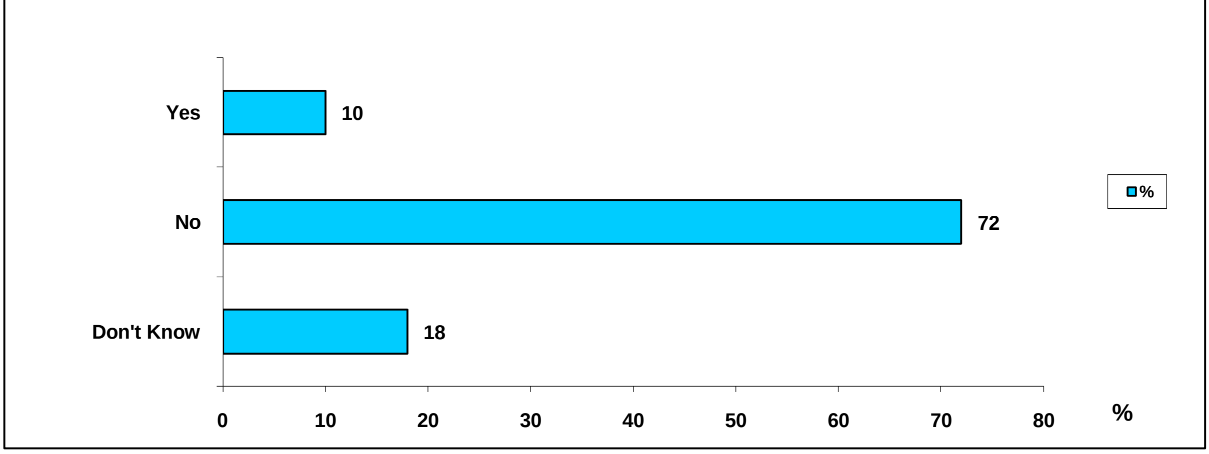
Among those who said they would be prepared to pay more for greener energy, and who specified an amount in percentage terms (n=219), the average was an increase of 8% with a range from 1% to 30%.

2.9.2 Subsidising Vulnerable Groups

One in ten (10%) respondents said they would be willing to pay more to subsidise the price of energy for vulnerable groups, with almost three quarters (72%) against such a move and 18% undecided.

Analysis by social class found that almost one quarter of ABC1s were undecided (23%) compared with those in social classes C2DE (13%), with those in social classes C2DE more likely to explicitly say that they would not be willing to pay more (78% vs. 67%).

Figure 37: Would you be willing to pay more to subsidize the price of energy for vulnerable groups? (n=1203)

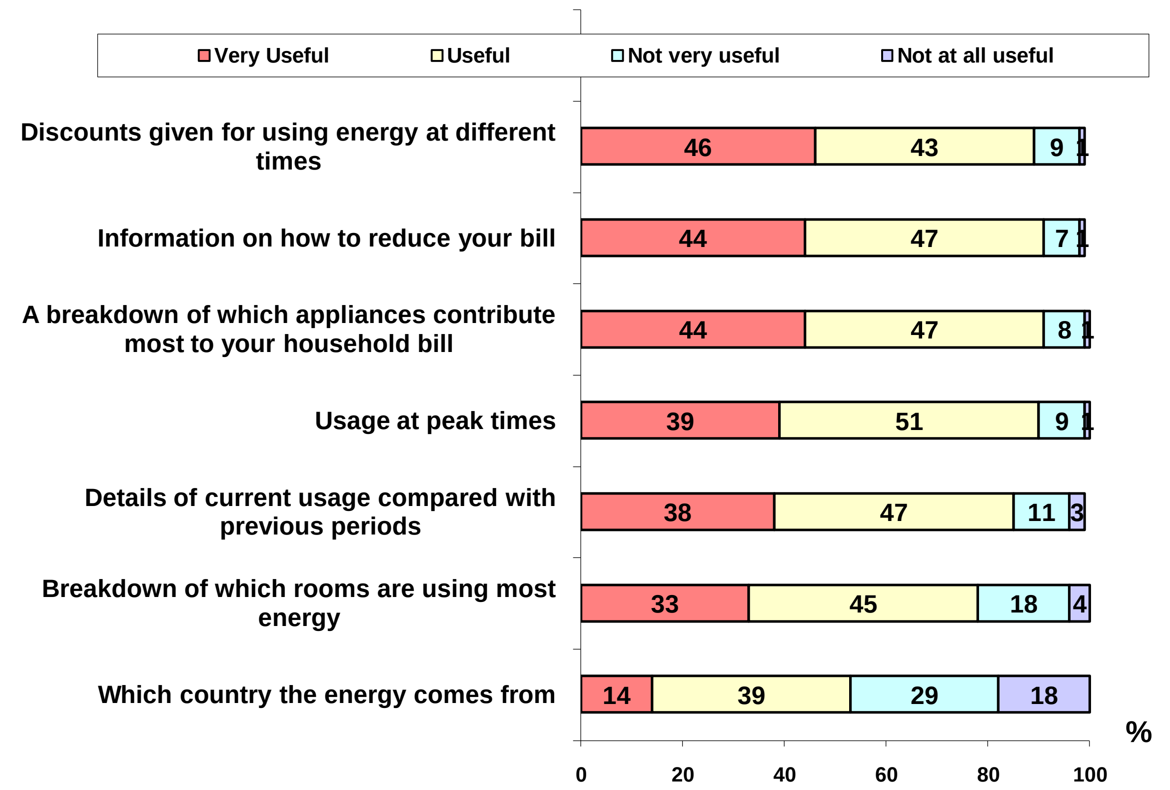


Owner occupiers (11%) were more likely to say they would be prepared to pay more to subsidise prices for vulnerable customers compared with public (9%) and private rented sector tenants (6%, p<=0.001). Those educated to degree level or equivalent (12%), are more likely to say they would pay more.

2.9.3 Energy Efficiency Information

Approximately nine out of ten respondents said they would find it useful if they were provided with information on information on how to reduce their bill useful (91%) and a breakdown of which appliances contribute most to their bill (91%). Conversely, 53% said they would find it useful to have information on which country their energy comes from.

Figure 38: If the following information could be provided to you, would you find this useful or not useful? (n=1203)



Information on a Breakdown of Which Appliances Contribute Most to Your Household Bill

- Those in the higher social classes (ABC1, 93%: C2DE, 89%) were more likely to say they would find this useful;
- Better educated respondents were more likely to say they would find this useful (95%);
- Owner occupiers (94%) were more likely to say they would find this type of information useful compared with public (85%) and private sector (89%) tenants;

Breakdown of Which Rooms Are Using Most Energy

- Those in the higher social classes (ABC1, 82%: C2DE, 75%) were more likely to say they would find this type of information useful;

- Owner occupiers (84%) were more likely to say they would find this type of information useful compared with public (69%) and private sector (74%) tenants;

- Those educated to degree level (84%) were more likely to say they would find this type of information useful compared with others;

Details of Current Usage Compared With Previous Periods

- Owner occupiers (88%) and private sector tenants (90%) were more likely to say they would find this type of information useful compared with public sector tenants (78%);

- Those educated to degree level (90%) were more likely to say they would find this type of information useful compared with others;

Usage at Peak Times

- Owner occupiers (93%) were more likely to say they would find this type of information useful compared with public (84%) and private sector (88%) tenants;

- Those educated to degree level (96%) were more likely to say they would find this type of information useful compared with others;

Discounts Given For Using Energy at Different Times

- Owner occupiers (92%) were more likely to say they would find this type of information useful compared with public (84%) and private sector (89%) tenants;

- Those educated to degree level (94%) were more likely to say they would find this type of information useful compared with others);

- Non natural gas customers were more likely to say they would find this type of information useful (91% vs. 83%);

Information on How to Reduce Your Bill

- Customers in urban areas were more likely to say they would find this type of information useful (93% vs. 86%);

- Owner occupiers (94%) were more likely to say they would find this type of information useful compared with public (86%) and private sector (91%) tenants;

- Respondents with no formal educational qualifications were less likely to say they would find this type of information useful (86%) compared with other groups;

Which Country the Energy Comes From

- Owner occupiers (58%) were more likely to say they would find this type of information useful compared with public (43%) and private sector (48%) tenants;

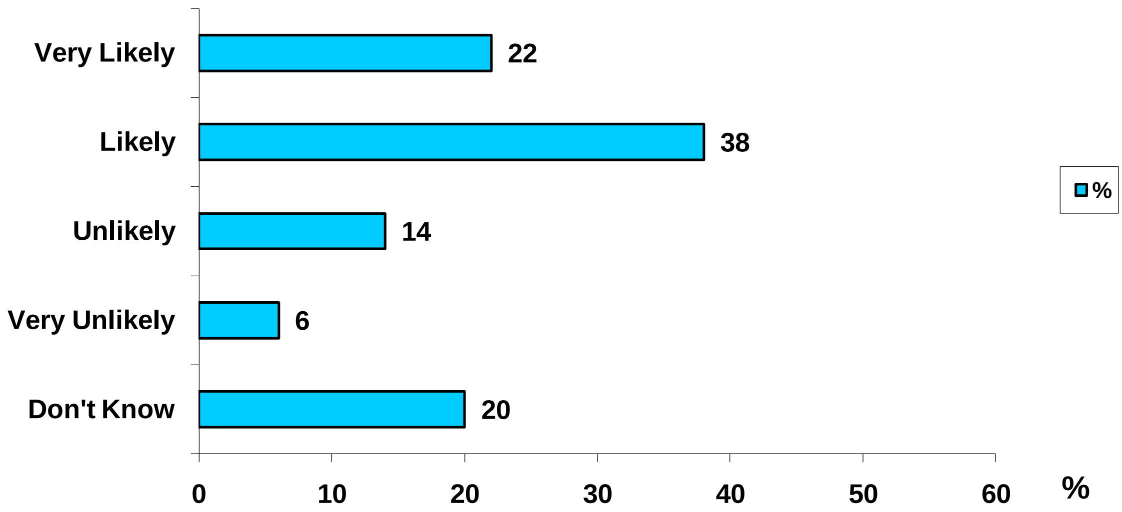
- Belfast respondents (61% vs. 50%) were more likely to say they would find this type of information useful;

- Respondents with no formal educational qualifications were less likely to say they would find this type of information useful (46%) compared with other groups;

2.9.4 Changing Electricity Use to an Off Peak Time (Non Gas Customers)

Many (60%) non natural gas customers said that given the opportunity they would be likely (22% very likely: 38% likely) to change their electricity use to an off-peak time and save money (e.g. from day time to evening or night time). One in five (20%) said they would be unlikely to do so (14% unlikely: 6% very unlikely).

Figure 39: If you had the opportunity to change your electricity use to an off-peak time and save money (e.g. from day time to evening or night time) how likely or unlikely would you be to do this? (n=1016)



There were a number of statistically significant differences in response:

- Those aged 30-49 (66%) were more likely to say they would make such a change given the opportunity (16-29, 55%: 50-64, 61%: 65+, 50%);

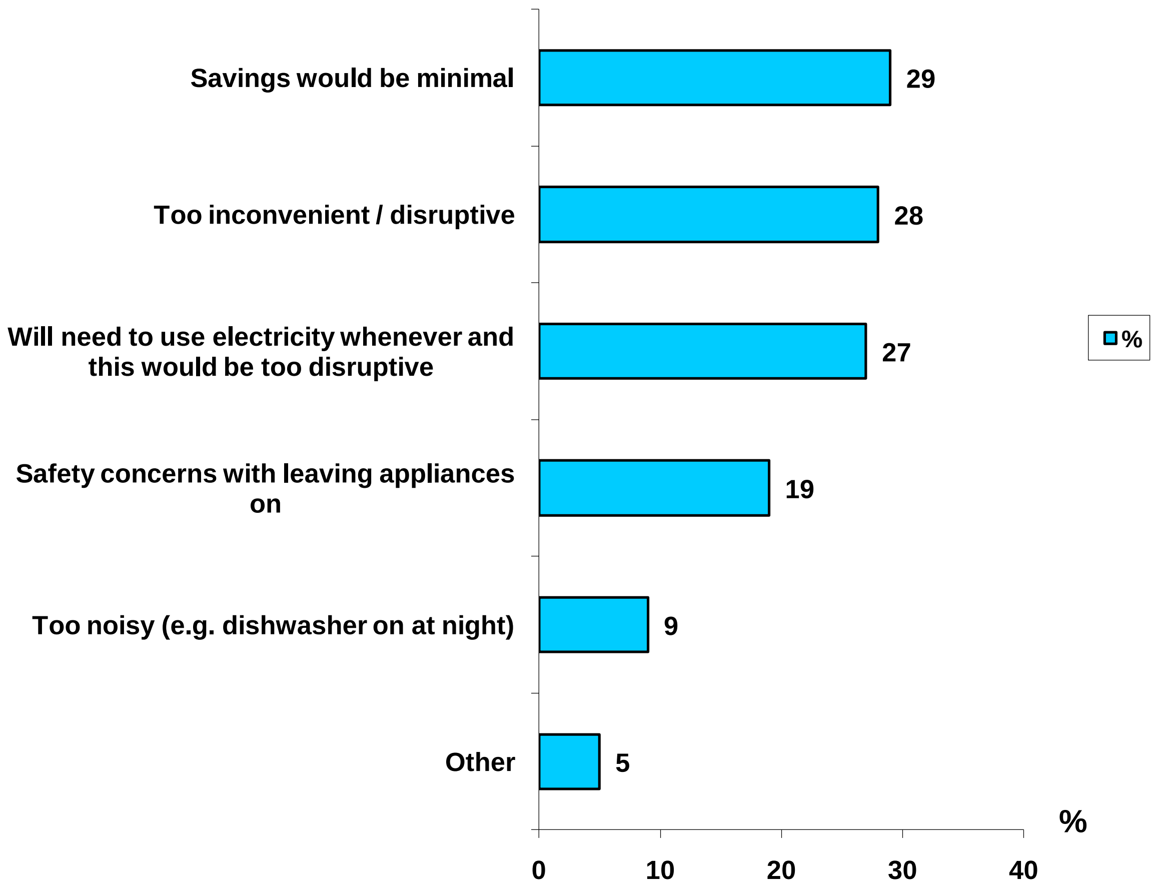
- Public sector tenants (44%) were less likely to say they would make such a change given the opportunity (compared with owner occupiers (62%) and private sector (69%) tenants;

- Respondents with no formal educational qualifications were less likely to say they would make such a change given the opportunity (50%) compared with other groups;

2.9.5 Reasons for Not Changing Electricity Use to an Off Peak Time (Non Gas Customers)

The main reasons why non natural gas customers would be unlikely to switch their electricity use to off-peak times are a perception that savings would be minimal (29%), inconvenience / disruption (28%) and the need to use electricity at the time of need (27%). Almost one in five (19%) of those who would be unlikely to switch cited safety concerns with noise a factor for 9% of these respondents.

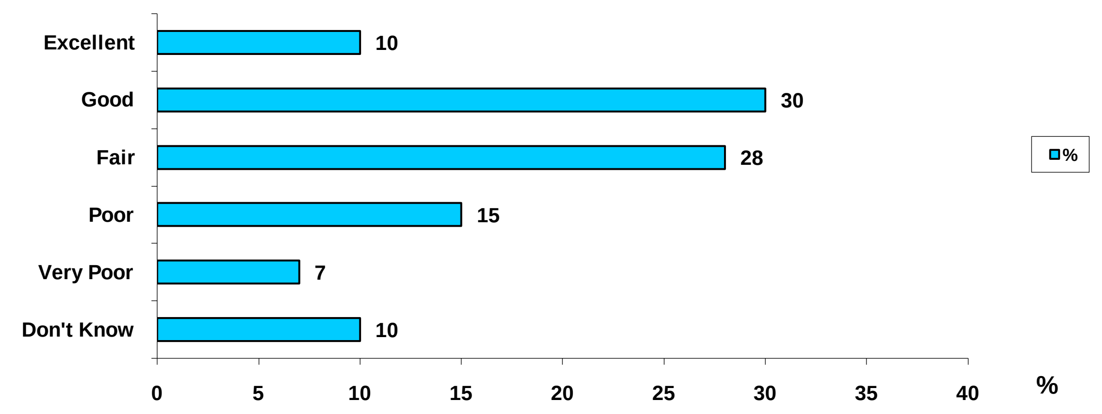
Figure 40: Why would you be unlikely to switch your electricity use to off-peak times? (n=199)



2.9.6 Awareness of Energy Use in the Home

Four out of ten (40%) respondents rated their awareness of how much energy they are using in the home as either excellent (10%) or good (30%), with 28% rating their awareness as fair and 22% as poor (15% poor: 7% very poor).

Figure 41: How would you rate your awareness of how much energy you are using in your home? (n=1203)

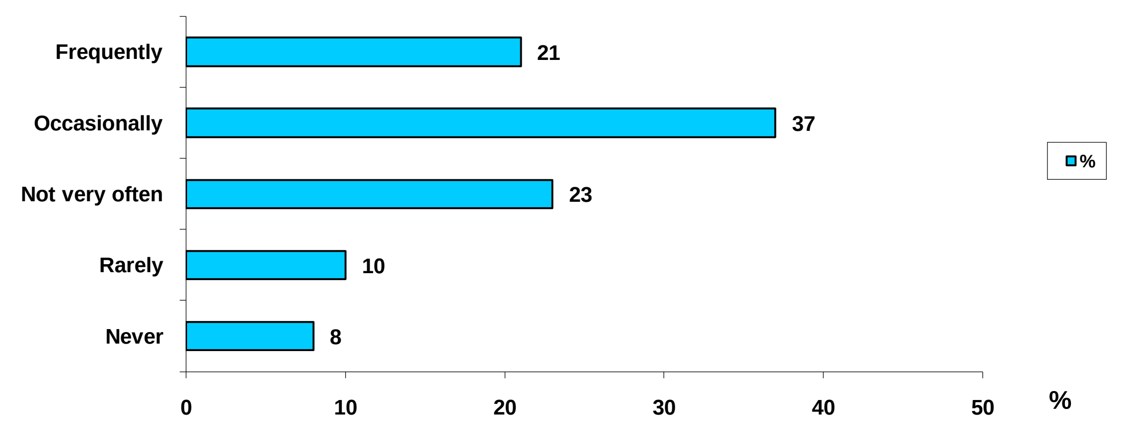


Compared with other age groups, older (aged 65+, 33%) and younger (aged under 30, 34%) respondents were less likely to rate their awareness of how much energy they use as either excellent or good. Natural gas customers were also less likely to rate their awareness as either excellent or good (32% vs. 42%).

2.9.7 Conscious of Energy Use within the Home

For approximately one in five respondents (21%) thinking about the use of energy in their home is a frequent experience with 37% thinking about it occasionally, 23% not very often and 18% rarely (10%) or never (8%).

Figure 42: Is the use of energy in your home something that you think about? (n=1203)



There were a number of statistically significant differences in response:

- Younger respondents (aged under 30, 41%) were less likely to think about their energy use in the home on a frequent or occasional basis compared with other age groups (30-49, 64%: 50-64, 67%: 65+, 55%);

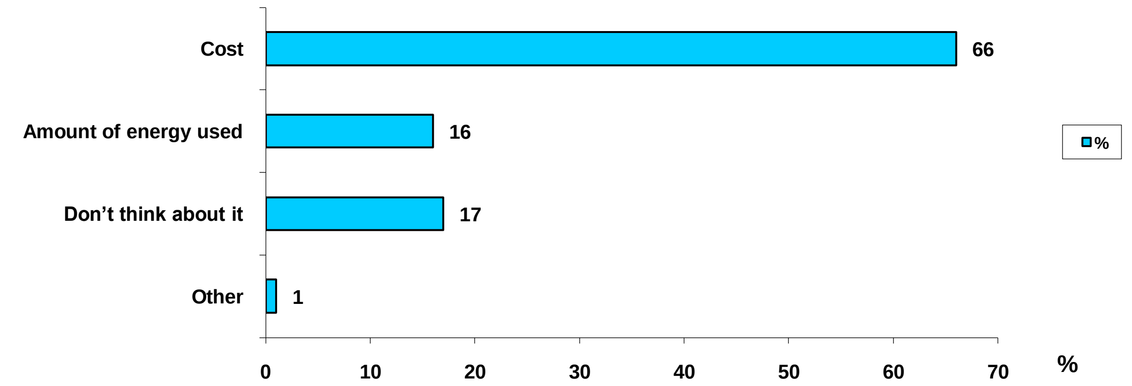
- Public sector tenants (46%) were less likely to think about their energy use in the home on a frequent or occasional basis compared with owner occupiers (65%) and private sector (54%) tenants;

- Non natural gas customers were more likely to think about their energy use in the home on a frequent or occasional basis (61% vs. 47%);

2.9.8 Rationalise Energy Use in Terms of Cost or Amount Used

In the majority of cases, respondents said they think about energy use in their home in terms of cost (66%), with 16% rationalising their use in terms of the amount of energy used, and 17% saying they don't think about their energy use in the home.

Figure 43: When using energy in your home, do you think of it mainly in terms of how much it costs or the actual amount of energy you are using?(n=1203)



There were a number of statistically significant differences in response:

- Both younger (aged under 30, 24%) and older respondents (65+, 24%) were more likely to say that they don't think about how much energy they use in the home compared with other respondent age groups (30-49, 13%: 50-64, 14%);

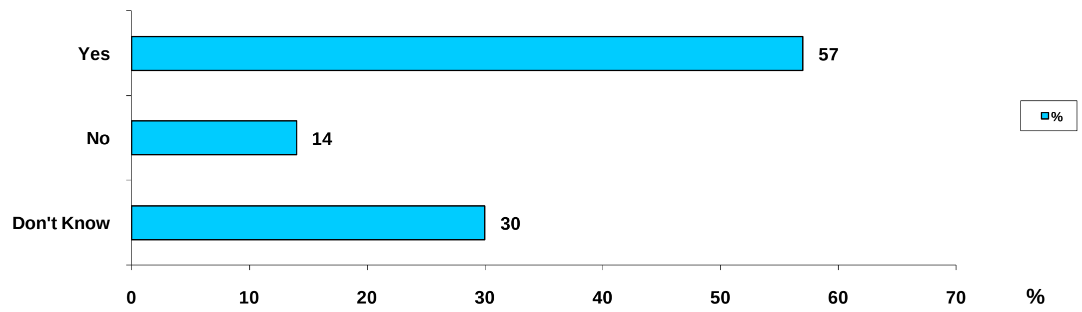
- Respondents in urban areas were more likely to say they think about cost (69% vs. 56%) whereas rural respondents were less likely to think about how much energy they use in the home (19% vs. 15%);

- Public sector housing tenants (27%) were more likely to say they don't think about their energy use in the home compared with owner occupiers (12%) and private rented tenants (19%). Public sector tenants were also less likely to think about the amount of energy they use (9% compared to 19% of owner occupiers and 13% of private rented tenants);

2.9.9 Interest in Real Time Use of Energy

More than half of respondents (57%) said that they would use energy more efficiently if they had a way of seeing in real time how much energy they are using in their home, with 14% saying that this would not help them to be more energy efficient and 30% were unsure.

Figure 44: If you had a way of seeing how much energy you were using in real time in your home, would this help you to use energy more efficiently in your home? (n=1203)



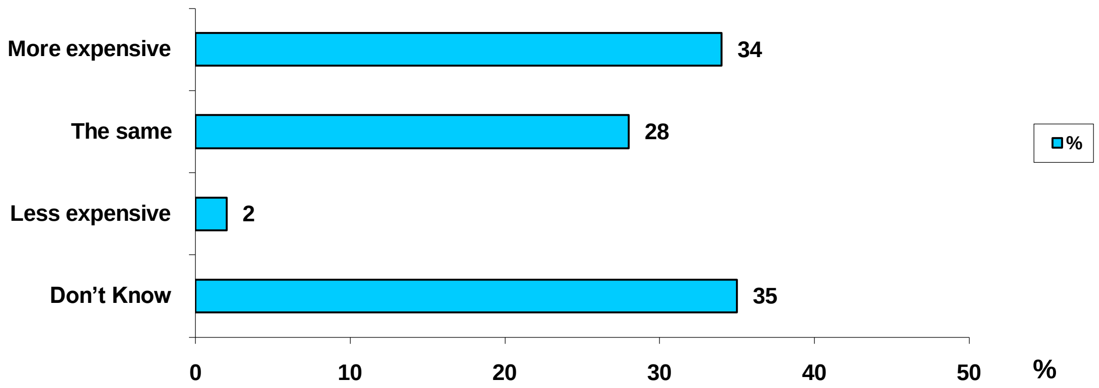
There were a number of statistically significant differences in response:

- Respondents aged 30-49 (62%) were more likely to see a real time energy using device as useful compared with respondents in other age groups (aged under 30, 56%: 50-64, 57%: 65+, 43%);
- Those in the higher social classes (ABC1, 63%) were more likely to see a real time energy using device as useful compared with respondents in social classes C2DE (51%);
- Owner occupiers (59%)were more likely to see a real time energy using device as useful compared with respondents in public sector housing (52%) or private rented tenants (58%);
- Respondents in households with access to the internet were more likely to see a real time energy using device as useful (61% vs. 46%);
- Those educated to degree level (73%) more likely to were more likely to see a real time energy using device as useful compared with others (no formal educational qualifications, 46%: GCSE or equivalent, 52%: A 'Level or equivalent, 63%);

2.9.10 Energy Prices in Other European Countries

When asked to compare the price of energy with other European countries, approximately one third (34%) of respondents believe that prices in Northern Ireland are more expensive, with 28% of the view that prices are the same and 2% less expensive.

Figure 45: Thinking about the price charged for electricity / gas, how do you believe that electricity / gas in N Ireland compares to that in other European countries such as the Republic of Ireland, Great Britain, France, Germany or Spain? (n=1203)



There were a number of statistically significant differences in response:

- Respondents aged 30-49 (38%) and 50-64 (40%) were more likely to be of the opinion that prices in Northern Ireland are more expensive (16-30, 27%: 65+, 25%), whereas younger (aged under 30, 42%) and older respondents (aged 65+, 46%) were more likely to answer 'don't know' (30-49, 33%: 50-64, 28%);

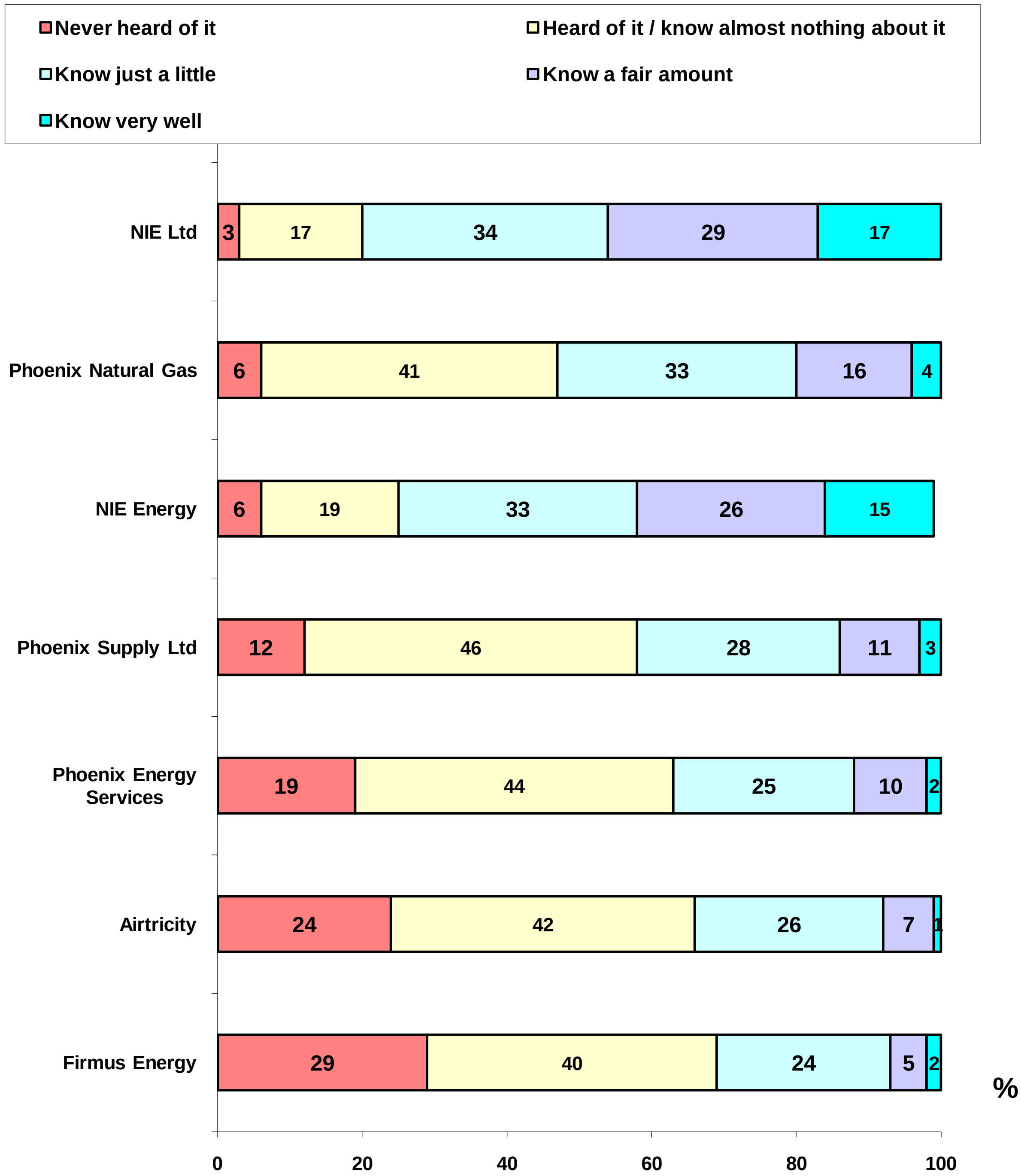
- Tenants in private rented sector accommodation (42%) were more likely than owner occupiers (33%) and tenants in public sector housing (30%) to believe that energy prices in Northern Ireland are more expensive;

2.10 Image and Branding

2.10.1 Awareness of Different Energy Companies

All respondents were presented with the names of different energy companies, as well as the company logos. In terms of awareness, 97% had heard of NIE Ltd, 94% are aware of Phoenix Natural Gas with 94% aware of NIE Energy. Lower levels of awareness were recorded for firmus Energy (71%), Airtricity (76%), Phoenix Energy Services (81%) and Phoenix Supply Ltd (88%) [weighted data].

Figure 46: Awareness of Energy Companies (n=1203)



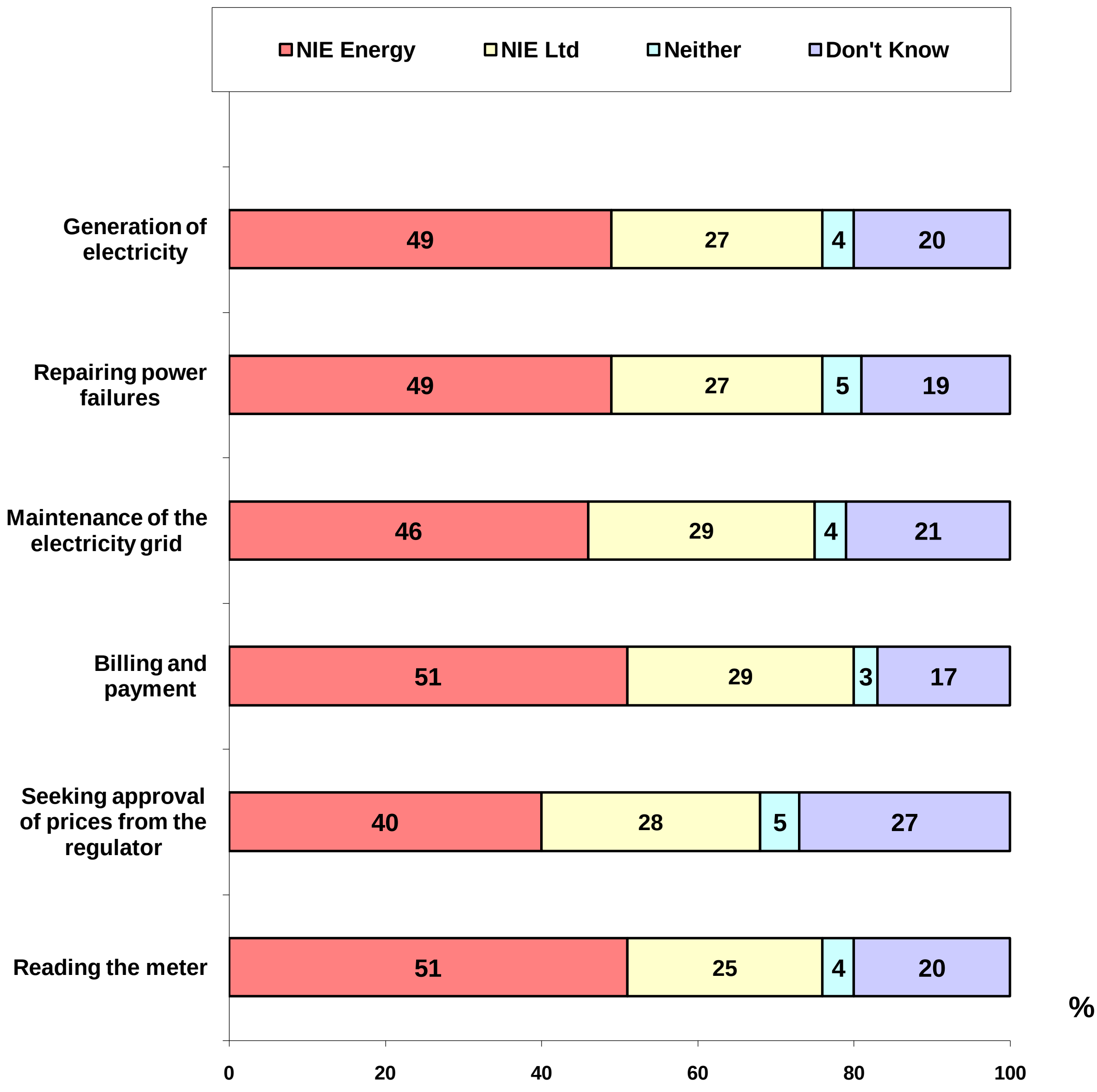
2.10.2 Responsibilities of NIE Energy and NIE Ltd

Just under half (49%) of all respondents incorrectly stated that NIE Energy is responsible for the generation of electricity, with similar numbers incorrectly of the view that NIE Energy is responsible for repairing power failures (49%) and for maintenance of the electricity grid (46%) [weighted data].

Most (51%) respondents correctly identified NIE Energy as having responsibility for billing and payment, with 40% correctly stating that NIE Energy has responsibility for seeking approval of prices from the regulator.

Finally, most (51%) respondents incorrectly stated that NIE Energy has responsibility for meter reading.

Figure 47: Looking at the following list of responsibilities, please select which you believe NIE Energy Supply is responsible for and which NIE Ltd is responsible for? (n=1203)

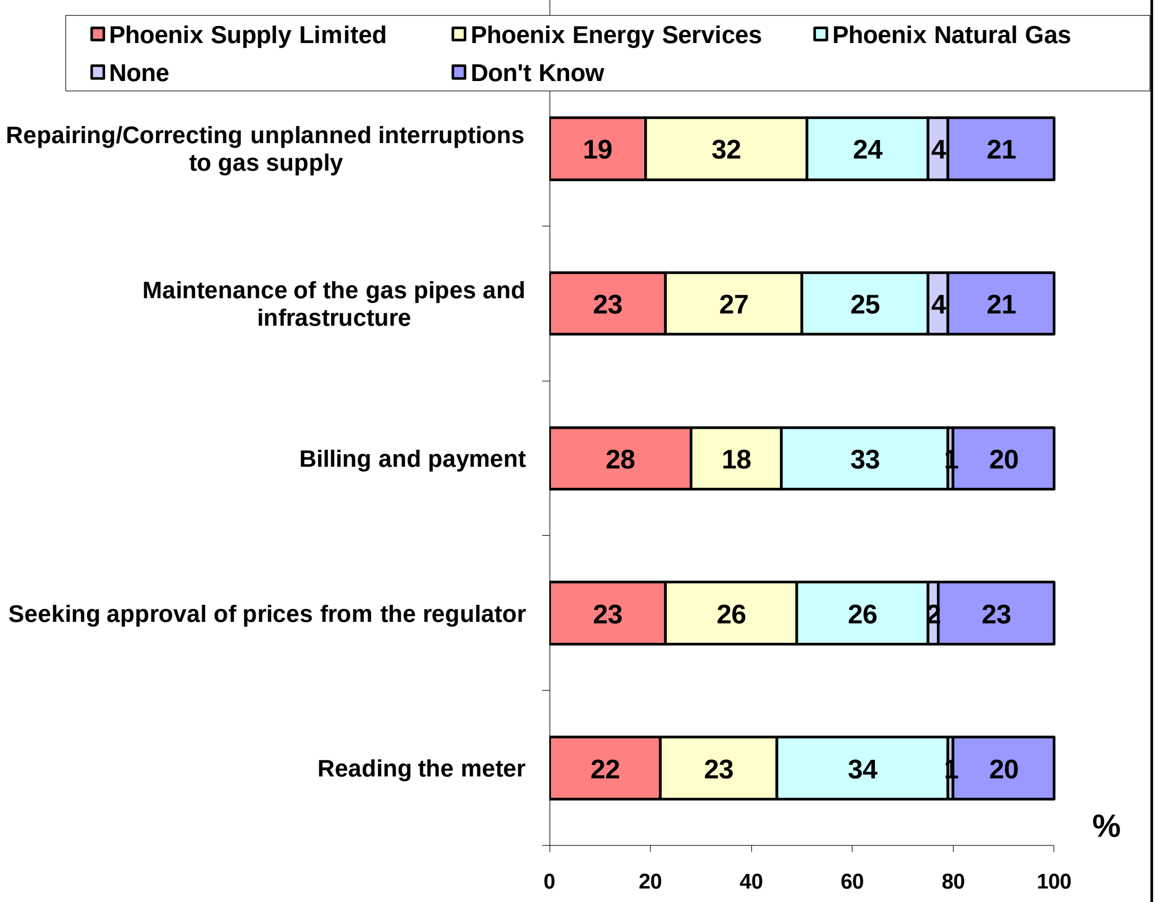


2.10.3 Responsibilities of Phoenix Supply Ltd, Phoenix Energy Services and Phoenix Natural Gas

Almost one quarter (24%) of Phoenix Supply Ltd customers correctly identified that Phoenix Natural Gas is responsible for repairing / correcting unplanned interruptions to gas supply, with 25% aware that Phoenix Natural Gas is responsible for maintenance of the gas pipes and infrastructure. A similar number of respondents (23% and 26%) correctly stated that Phoenix Supply Limited and Phoenix Natural Gas seek approval of prices from the Regulator.

Almost three out of ten (28%) respondents correctly stated that Phoenix Supply Ltd is responsible for billing and payment, with 34% correctly stating that they have responsibility for reading meters [unweighted data].

Figure 48: Looking at the following list of responsibilities, please select which you believe Phoenix Supply Limited is responsible for, which Phoenix Energy Services and which Phoenix Natural Gas is responsible for? (n=387)



2.10.4 Brand Image (Customers Only)

Customers of the different energy companies were asked to say which words or phrases they most associate with their provider. Table 2.6 shows that NIE Energy was more likely to be associated with efficiency (40%) whereas Airtricity was more likely to be associated with value for money (53%). Phoenix Supply Ltd was more likely to be associated with the term 'modern' compared with other companies, whereas firmus Energy was more likely to be associated with renewable energy.

Table 2.6: Most Associated Words / Phrases with Energy Companies [unweighted data]

	NIE Energy (N=1042)	Airtricity (N=66)	Phoenix Supply Ltd (N=372)	firmus Energy (N=62)
	%	%	%	%
Efficient	40	23	32	32
Value for money	20	53	24	36
Strong	30	15	23	8
Monopoly	28	15	21	8
Reliable	36	27	30	34
Modern	13	15	25	18
Committed to renewable energy	10	36	17	45
Trustworthy	14	17	10	21
Helping the consumer reduce their energy use	6	15	-	26
Good customer service (query or problem)	4	2	1	2
Clear and easy to understand bills / information	4	3	2	3
Other	9	5	11	7

Customers were given the opportunity to say which words or phrases they least associate with their provider. More than four out of ten (43%) NIE Energy customers said that the company was least likely to be associated with value for money, whereas this was cited by 2% of firmus Energy customers. Customers of Airtricity (30%) and firmus Energy (the two most recent market entrants) were more likely to cite the word 'strong' as being least likely to be associated with these companies.

Table 2.7: Least Associated Words / Phrases with Energy Companies [unweighted data]

	NIE Energy (N=1042)	Airtricity (N=66)	Phoenix Supply Ltd (N=372)	firmus Energy (N=62)
	%	%	%	%
Efficient	6	9	5	3
Value for money	43	9	35	2
Strong	13	30	17	29
Monopoly	13	18	13	42
Reliable	5	14	5	8
Modern	10	11	6	2
Committed to renewable energy	17	12	9	8
Trustworthy	8	12	9	2
Helping the consumer reduce their energy use	18	9	13	5
Good customer service (query or problem)	10	9	9	13
Clear and easy to understand bills / information	8	8	4	7

APPENDICES

APPENDIX A (FOCUS GROUPS)

PART 1 – ABOUT YOU

Gender

Male	18
Female	24
Totals	**42**

Age band

18 - 35	12
36 – 50	13
50+	17
Totals	**42**

Main energy source used to heat home

Gas	11
Oil	26
Electricity	0
Solid Fuel	4
Something else	1
Totals	**42**

How do you pay for your main energy source used to heat your home?

Direct debit	5
Pre-payment	8
Something else	29
Totals	**42**

Vast majority used methods other than direct debit or pre-payment. Other methods included:

- Cash
- Cheque
- Credit card
- Debit card

Suggestion for survey:: *May be helpful to clarify what is meant by 'pre-payment' since some participants mentioned 'gas cards' but seemed to perceive this 'pay as you go' rather than pre-pay.*

PART 2 – PAST EXEPERIENCE

General Attitudes to Switching Supplier

Vast majority had switched something.
Land line and insurance were the most popular switches.

Motivation…

- Main motivation was saving money and help with budgeting – this was a recurring theme throughout all the focus groups and across many of the questions.

  Other reasons were:
  - Charges going up – overall cost
  - Perceived unfair charges introduced
  - Competitors offering cheaper and, in some cases, superior products e.g. more mobile phone minutes etc
  - Shorter contracts – greater flexibility for customer
  - Competitor offered more affordable monthly payments;
  - Service failure – one supplier had not activated the DD and when all that was owed was taken out at once, caused the customer to go into overdraft, incurring bank charges;
  - Gifts from suppliers e.g. offers of lap tops, phones, TVs etc if customers switched.
  - Seemed to be more about product and price than service, 'services' perceived as 'commodities' e.g. insurance
  - Sense of 'administrative neatness' – having a range of services from the one supplier rather than from various suppliers. Some would switch just for the 'neatness' even if the cost and service were the same.

Method of switch…Over the phone mainly

Time and satisfaction - Most 2 - 3 years into switch experience, very happy with their choice – wouldn't go back – most would recommend the change. A few said they would not recommend their switch as such but would encourage people to 'shop around'

General view of those who had not switched anything:

(a) It wasn't 'broken' – boiled down to perception of being treated fairly and service was affordable – "Don't see any reason"; "More than happy [with current supplier]"

(b) Perceived a need for 'stability' in that aspect of their lives for some reason – e.g. bank house insurance – fear that 'something would come up' and felt 'safer' with same provider especially if with them for a long time. A sense that 'they know me and I know them' – relationship, or perceived relationship appeared to be a factors

(c) Too much hassle

(d) Some felt themselves to be already in a negotiating position with their current supplier i.e.

- Could 'shop around' and threaten to leave if they saw a better deal and then get even better deal from current supplier without leaving!

- Some got annual reviews and were offered special deals to stay – "If you with a place, they'll offer you discounts [loyalty]"

What would it take to get the non-switchers people to switch?

- Saving 'significant' amount of money – "It would have to be a lot cheaper"
- 10% [of current supplier's costs] was the most frequently cited threshold
- Some would have moved for 5% / 6% of current costs.

Suggestion for survey: Ask respondents if they 'chose' to change supplier e.g. they could have changed banks but that was only because the bank was taken over.

PART 3 – SWITCHING ENERGY SUPPLIER

Have you changed your main energy supplier in the last 12 months?

Only 4 had switched. Vast majority (38 out of 42) had not.

Motivation…

Had switched from coal to gas because:
- Cleaner
- Less mess
- Convenience of gas (heating and hot water etc)
- Kept the house warmer
- NIHE tenants had installation paid for by NIHE grant

Method of switch…Over the phone mainly

Time and satisfaction – Mostly 1 – 2 years into switch experience, very happy with their choice – wouldn't go back – most would recommend the change.

Vast majority has <u>not</u> switched energy supplier:

General view of those who had not switched anything. Reasons given were:

- Re gas - The option to switch to gas did not exist in some areas yet. A few did not know there was another gas supplier

- Re electricity – some uncertainty about what was on offer if one switched from NIE – suspicion amongst some that Airtricity would be "Cheaper until they 'got you in'" – that cost differential would not be sustained indefinitely.

- General reasons:

  - Main reason - It wasn't 'broken' – "Happy enough with what I've got"
  - Perceived a need for 'stability' in that aspect of their lives – did not want the disruption of floors having to be taken up. Worries about cost and quality of reinstatement as well as the mess and disruption
  - Too much hassle

- Alternatives perceived as hazardous e.g. a few participants said they would not change to gas as a fuel – 'afraid of it' – risk 'poisonous fumes' (Carbon monoxide) - even worried about next door having it.

- Would cause disruption – reference to disruption to home, floors, doors etc with the installation of gas – "whole mess" – for which customer did not feel compensated.

What would it take to get the non-switchers people to switch? (Top two were the most frequently cited)

- Saving 'significant' amount of money.
    - Ideally, guarantee a low price for a long period.
    - Again around 10% [of current supplier's costs] was the most frequently cited threshold
    - Give you a cash sum if you stayed with them for a certain length of time.
    - Flexible charging – even out payments so that you pay less even in months when you use more (DD?)
- No cost, hassle free installation

- Reassure me re safety – wanted carbon monoxide detectors if installing gas – worries about safety.
- Good customer service for new customers – "They would have to stand over any problems" that may arise. Also want prompt response / resolution to customer problems – within 24 hours.
- Major crisis (e.g. boiler needing replaced) where it would sense economically to put in a new system.
- The opportunity to have more space in my back garden e.g. removal of oil tank

Suggestion for survey: Ask respondents if they 'chose' to change energy supplier e.g. one person had moved house and as a consequence of the different heating systems in their former home and their new home (e.g. going from gas to oil) had effectively changed their main supplier – but this is not the type of scenario we were after.

Before this evening, were you aware that you could change your gas supplier?

- 23 said 'Yes'
- 19 said 'No'.

Before this evening, were you aware that you could change your electricity supplier?

- 30 said 'Yes'
- 12 said 'No'.

PART 4 – INFORMATION

When you receive your bill, do you actually read it?

Varied responses:

Yes	13
No	3
Sometimes	10
Does not apply (prepay)	16
Totals	**42**

Yes:

- 'Trust' / ' Mistrust' issues emerged very strongly – customers did not trust suppliers to supply amount charged for – "Make sure you are paying for what you use [and not more]" / "Just in case there was an error in the reading"

- Comparison – Compare current bill with most recent or same period last year for a 'reasonableness check' – also to check if cost going up or down.

- Unit price – Look at bill to check on this.

- Economy – Look at overall bill to see if any way household could economise on energy use.

- Worry about 'hidden' charges being applied to bills that were not actually the energy itself e.g. rumours re delivery charges on bills for oil

No:

- Mainly people who are aware of what they use and the amount rarely varies – see no added value in looking at bills in detail.

Sometimes:

- Comparison – As above
- "It depends on how much time you have"
- "Don't want to look! [Another bill]"

Information on your bill

Wanted to see the following:

(Note: There was no differentiation between essential and desirable items)

- Breakdown of which appliances (ideally, in their home – or even generally) have contributed (or typically contribute) most to the household bill;

- Breakdown of which rooms are using most energy.

- Details of consumption (i.e. units used and cost) re this bill with:
    - Most recent bill;
    - This time last year.
    - Show explicitly if current usage and cost is more or less than before.
    - Show this information in graphical format as well as a table of figures

- Consumption usage at peak times Complete breakdown of the charges e.g. cost of delivery vs. cost of fuel / energy

- Discounts given

- Information on how to reduce the bill i.e. Anything that customers can do to reduce overall cost

    - Tips on energy efficiency
    - Information of different times of day to use energy and get it cheaper
    - Information on different payment methods
    - Information on different tariffs e.g. people who use more getting energy at lower unit rates;
    - Information on incentive schemes e.g. any % discount for 'loyal' customers etc.

- Bigger print – can't see the small print

- Have bill available in different formats (SMR appreciates this may already be available)

- Don't charge customers extra for a paper bill

- Information on where the energy is coming from – not just fuel mix but what countries' resources are being used to generate the energy we use;
- Details of supplier's customer service department

- Date bill needs to be paid by

There was a suggestion that energy companies might send users a text, letter or email if their consumption was close to exceeding or had exceeded and agreed threshold.

Suggestion for survey: Little value in asking respondents to differentiate between essential and desirable items. Simply see them as items on a bill.
Suggest question is worded with a focus on the type of information people would like to see and perhaps give an example? A few people misunderstood (?) the question and responded with comments like 'smaller bills!'

Fuel mix: How necessary is it to you to receive information like this Handout 1 on your bill

Essential	8
Desirable	12
Not necessary	22
Totals	**42**

Essential:

- "We should know where the money is going"
- "If you are 'green-conscious' you would want to know" [assumption that most people were not]
- See effects of CO_2 emissions

Desirable:

- "You can see where you are getting your energy from [sources]"
- "Shows you how little of it comes from 'green' sources, like wind"
- "It's useful but it has insufficient information to act on… no cost implications"
- "It's nice to know"

Not necessary:
- Perceived powerlessness – Can't do anything about it anyway – one individual vs. industry! Can't impact on it, therefore, "Why are you telling me?" Can't change the materials e.g. coal.
- "Looks like mumbo jumbo"/"Would go over my head"/ "Most people wouldn't get [understand] it"
- "Waste of ink"
- "Unless 'green-friendly… would not be interested"

Current table thought to be incomprehensible to every day person
If it has to be there:
- "Make it something we can understand!"
- "Simplify it"

In terms of giving you access to information on your rights as a consumer, what information would you like to see on your bill?

Main wish was for a phone number:
- a phone number of an independent, 'government-regulated' organisation – did not matter which (e.g. CAB or CCNI)
- a phone number – Lo call or, ideally, a free phone number
- a phone number that connects them to a human being – not a machine!
- a person at the other end who:
    - speaks English
    - can be understood (reference to accent)
    - understands their accent
    - can explain things in everyday language (no jargon)
    - is competent - can actually support them with their problems / enquiries
    - can call them back at a designated time
    - who will be their single point of contact for the resolution of the call – not 'pillar to post'

Also wanted the following contact details:
- Email;
- Web site;
- Postal address
- Names of appropriate managers
- Details of time limits re responding to queries

PART 5 – PREFERENCES

How often would you like to receive your energy bill?

Once a month	26
Once a quarter	10
Once every six months	0
Once a year	2
In real time	1
Some other frequency	3
Totals	**42**

Over half preferred once a month

- Main reason was budgeting – most people get paid monthly - 'you know where you are'. "[Consumption pattern] still fresh in your mind". Gives customer feeling of 'being in control'

Once a quarter

- Always had quarterly bills - "Used to that"
- "Less bills to think about every month"

Suggestion for survey: Consider adding 'Once a week' to the list of choices? Mentioned by one of the respondents.

In what format would you like to receive your energy bill?

Paper	33
Via my meter (SMART)	2
TV (via SMART meter)	1
Email	3
Website (my account)	0
Text message	3
Some other way	0
Totals	**42**

Vast majority wanted a paper bill:

- Sense of security / permanence about a paper bill
- "It's a receipt", "It's in front of you"
- Ease of comparison in future
- "I don't understand text… email"
- Handy if, for example, you need to present a utility bill to prove place of residence.
- Web sites could be down
- Other formats e.g. email / text "too easily deleted" – paper feels permanent.

Text

- Easier / quick to read – would only look at essential information [consumption and cost]
- Don't like junk mail
- Security issue - Don't like post piling up when not person is away.

Email
- Have the option to print it out if you want to.

Against, emails and texts – how could you authenticate the sender? Also, emails, user has to print off details, "the paper comes to you" – less effort. Furthermore, web sites, not liked, user has to make effort to log in and check bill.

If you had the opportunity to change your energy use to a different time of day and save money (e.g. because day time electricity costs more than night time electricity, how likely would you be to do that?

Definitely	20
Highly likely	8
Unlikely	8
Wouldn't bother	1
It would depend…	5
Totals	**42**

'Definitely' / 'Highly Likely'

- Main reason / expectation was 'it saves money'.
- Some who had done this already said it really does save money.
- Those who had not were expecting a 'big' reduction in the bill – circa 10%.

'Unlikely' / "Wouldn't bother'

- Think wouldn't save much
- Would not be convenient – can't hoover at night!"
- If you need something e.g. a cooker on, you need it – only so much one can do without disrupting normal lifestyle;
- Safety concerns – worries about leaving appliances on and running at night – fire risk?
- One person had tried it but neighbours complained about washing being on at night – noisy.

'Depends'
- Whether there would really be sufficient savings in it
- The time of day e.g. "if [savings applied] after midnight… no use" – Only perceived as useful if around 6pm "when you're up".
- If appliances had timers or could be fitted with timers.

If you had a way of seeing how much energy you are using at any moment, how likely is it that that would help you reduce your consumption?

Definitely	25
Highly likely	6
Unlikely	4
Wouldn't bother	0
It would depend…	7
Totals	**42**

'Definitely' / 'Highly Likely'

- Widespread view that people are generally unaware of consumption and that this 'visibility' of information would help change behaviour - "You see it in front of you", Reference to rooms with no-one in with lights on, devices on standby, immersion heaters being left on longer than necessary.
- "Out of sight, out of mind [better to see consumption]"
- "See costs as they go [70p a shower]" (can change behaviour when see cost)
- "Would need to be able to see consumption in each room" – better targeting.
- More than a novelty – appears to have changed behaviour in the long term.
- NOTE: All of the above points related to saving money and not the environment.

'Unlikely' / "Wouldn't bother'

- Some people's usage already perceived as well disciplined. Can't see where, realistically, consumption could be reduced further e.g. "I only boil a kettle if I need to"
- Certain uses of energy are considered necessary and it was thought these would not change whether or not the facility to see consumption existed – "If you need it [e.g. a washing machine on], you need it"

'Depends'

- It would depend on how much you would save overall.
- If there was a big price difference between the use of two similar appliances e.g. room heaters – one could see the possible value in being able to see consumption figures. It would help one make informed choices.
- Might help with budgeting.

Would you be prepared to pay more for your energy supply so that others, less able to pay, can be supplied?

Yes	9
Maybe	5
No	28
Totals	**42**

Around two-thirds said 'No'.

Yes

- For people in "developing countries", "elderly", people with disabilities, low income families.
- "You have to trust the people [energy companies] you are giving it to… if you knew it was really going to help the people…show us *how* it helped".
- "If need be… 1p in the pound"

Maybe

- "Needs to go to the right people"
- Needs to not go on "administration" needs to actually "benefit the people"
- Some families, seemingly on low incomes, "have more money coming in than me [reference to 'alcoholics on DLA']"
- Need to find out who it was going to
- Acknowledgement that in today's economic climate, it could be themselves at some point in the future.
- Needs to feel like a charitable donation e.g. customer decides how much to give and when to give and to whom to give rather than it built in as a 'surcharge'. Seems to be more appetite for one-off payments rather than regular payments. E.g. would be willing to consider options where they could

'donate' £5 as a one off if they could specify which client groups were to benefit from their 'donation'.

No

- "Everything's [already] very dear" – hard enough for some families [some participants identified as lone parents] to make ends meet – "It's tough enough paying your own", "I'm keeping it all afloat"
- References to the current harsh economic climate
- "I already give enough to charities"
- Acknowledge complexity re identifying those 'less able to pay' – "How can you tell someone can't afford it?... There are people on the dole getting more than us" / "Where do you draw the line?"
- Some strongly negative perceptions expressed - Assumed that only reason for being less able to pay was a lack of drive to get out and work, "Why should we pay for someone sitting… doing nothing… probably on the dole… getting everything handed to them".
- "We pay enough in tax" / "There's enough money in the Government" to do this
- "Let the energy companies do it [pay for less able to pay]" – take it out of their profits.
- Suggestion that energy companies should have lower prices for everyone.

Would you be prepared to pay more for your energy supply if you knew that it came from a sustainable source /'green energy'?

Yes	4
Maybe	21
No	17
Totals	**42**

Two fifths said 'No, but half said 'Maybe'.

Note: Compare with response to previous question, more support for green issues that supporting less able to pay.

Yes

- "If it saves the planet in the long run"

- For the sake of their children / future generations

Maybe

- "If you thought they [the energy companies] would actually replenish the sources of energy that they had used [e.g. replant same amount of trees that were cut down to provide energy]

- If you could be sure that the additional charge was actually being wholly and exclusively used for environmental purposes i.e. "not just for profit".

- "If it created jobs"

- "Depends where the [green] energy comes from" e.g. there was a perception amongst a few participants that energy from wind turbines was actually cheaper for the energy companies to produce, therefore, why should the consumer pay more for it

- "If a lot of people do it, yes". Belief that it needed to be the social norm to generate energy by 'green' means. Seeming conflict where neighbouring communities have very different policies – where's the incentive? E.g. Strabane and Lifford

- For future generations, "[action now] will benefit everyone"

No

- "It's dear enough as it is"

- "It would seem like a [further] tax"

- "The damage to the planet is already done", "It's too little too late" - A sense that any contribution by the customer would have negligible impact relative to scale of the environmental restoration needed – assumption there was no point in trying.

- "If you wanted to be really 'green', you wouldn't use any fuel" – perception of pointlessness.

- "Don't care [where my energy comes from]… As long as I am getting energy, don't care"

PART 6 – BRANDING

Brand recognition / confusion

Which of the following companies provides gas to heat homes in NI (Showed the logos)

Phoenix Supply	21
Phoenix Energy Services	2
Phoenix Natural Gas	21
firmus Energy	26
Totals	**70**

There appears to be confusion about the Phoenix brand with 21 respondents identifying Phoenix Supply as the provider and the same number identifying

Phoenix Natural Gas as the provider. A small number identified Phoenix Energy Services as the provider.

firmus Energy was selected by 26 respondents out of 42.

Suggestion for survey: Further consideration of question re possible brand confusion. For discussion.

Brand recognition / confusion

Which of the following companies heats your home at the moment?

Similar confusion over Phoenix brand.

Participants appeared to be confused about the NIE brand as well with one participant selecting NIE Ltd as heating their home.

Phoenix Supply	3
Phoenix Energy Services	0
Phoenix Natural Gas	4
firmus Energy	4
NIE Ltd	10
NIE Energy	0
Airtricity	0
None of the above (oil, coal etc)	20
Totals	**41**
Note one person (Derry) did not vote when question was re-polled	

Suggestion for survey: Further consideration of question if we are to test Phoenix brand or NIE brand? Need to /Value of NIE brand test?

Brand image / strength / value

Phoenix	firmus	NIE	Airtricity
Strong			
Well known (2) Good (2) Reliable (2) Great service (1) Local (1) Honest (1) Helpful (1) Cheap (1) Can save you money (1) Good value for money (1) Competitive to firmus (1) Clean (2) Really quick to heat your home (1) Must be a good company, always hear them advertising (1) Would like to know more (1) Quick (1)	Have heard of them (3) Has arrived in some parts of the town (1) New kid on the block (2) Competitor to Phoenix (2) Cheap, clean, efficient / easy (2) Good company / well recognised company (2) Fast (2) Cheaper than Phoenix (1) Good heating and installing company (1) Gas supplier NI (1) Advertise on TV (1)	Reliable company (12) Very good (5) Good (6) Great Company (3) Pleased with this company (3) Ok (3) Always very helpful (2) Excellent supplier (1) Only electricity supplier in NI (1) Main provider in NI (1) Always come when called out, on time (1) Good supply (1) Know them (1) Have served us for years (1) Dependable power (1) Reasonable prices (1) Ok prices if you watch what you use (1 Good service (1) Can Talk to them (1) Keep the bills low in winter (1) Call outs are quick (1) Local (1)	Supposed to be / are cheaper [than NIE] (9) New player – competitor (4) Ok (3) Competitor of NIE (2) Good company (1) Trying to offer cheaper prices if you pay by DD (1) Free energy (1) Energy by wind (1) Just heard of them recently on TV (1)

Neutral (perceived)			
Gas infrastructure (1) Hot water (1) Provides natural gas (1) Original supplier (1)	Not servicing in my area yet (1)	Renationalise (3) Electricity for home, bills, energy (1) My monthly bill (1) Supply my electric (1)	From ROI/ 'Southern' (5) Meter reading / adverstising (1)

Weak			
Don't know (17) No opinion (25) Expensive (5) Digging up roads (1)	Don't know / Know nothing about them (25) Don't know much about them (2) No opinion (13) No dealings (3) Digging up roads /Road works (2) May be cheap to start with but will get more expensive (1) Expensive (1) Unreliable (1)	Don't know (1) No opinion (3) Expensive (6) Too dear (3) Could cost less (4) Very expensive (1) Established monopoly (1) Not prepared to offer email bills (1) Bad customer care (1) Something goes wrong takes days to fix it (1) Greedy – rip off (1) Dishonest (1) Big wages for top men and women (1)	Don't know / Never heard of them / Know nothing about them (25) No opinion (9) Has only arrived in NI (2) Don't do what they say (1)

APPENDIX B (SURVEY QUESTIONNAIRE)

Utility Regulator
ELECTRICITY GAS WATER

Public Knowledge, Attitudes and Behaviour
Regarding Energy Issues in Northern Ireland

23 February 2011

social market research
SMR

Section A: Customer Type

A1. First of all can I start by asking you what is the main energy source used to heat your home? **(CODE ONE ONLY) SHOWCARD**

Natural Gas	1
Oil	2
Solid Fuel (e.g. coal)	3
Electricity	4
LPG (bottled gas)	5
Wood	6
Other (please specify)	7

A2. How do you pay for your main energy source to heat your home? **(CODE ONE ONLY)**
SHOWCARD

Direct Debit	1
Prepayment	2
Pay As You Go	3
Credit Card	4
Debit Card	5
Cash	6
Cheque	7
Other (please specify)	8

A3. Which company supplies electricity to your home? **(CODE ONE ONLY)**

NIE Energy	1
Airtricity	2
firmus Energy	3

A4. Did you know that it is possible for households in Northern Ireland to change their electricity supplier? **(CODE ONE ONLY)**

Yes	1	→ Go to A5
No	2	→ Go to A6

A5. And have you changed your **electricity** supplier in the last year? **(CODE ONE ONLY)**

Yes, switched from NIE Energy to Airtricity	1
Yes, switched from Airtricity to NIE Energy	2
Yes, switched from NIE Energy to firmus Energy	3
Yes, switched from Airtricity to firmus Energy	4
No	5

IF A1 NE 1 GO TO A6

A6. If you were to change the type of energy you use to heat your home, what would you be most likely to change to? **UNPROMPTED**

Gas	1
Natural Gas	2
Phoenix Natural Gas	3
Phoenix Gas	4
Phoenix	5
Phoenix Supply Ltd	6
firmus Energy	7
firmus Gas	8
Don't Know	9
Other (specify)	10
GO TO A11	

IF GAS CUSTOMER GO TO A7 ELSE TO GO A11

A7. In the last year have you switched from non gas (e.g. oil, coal etc) to natural gas? **(CODE ONE ONLY)**

Yes	1
No	2

A8. Which company currently supplies natural gas to your home? **(CODE ONE ONLY)**

Phoenix Supply Ltd	1
firmus Energy	2

A9. Did you know that depending on location, it is possible for some households using natural gas to change their supplier? **(CODE ONE ONLY)**

Yes, and possible for me to change because more than 1 supplier in my area	1	→ GO TO A10
Yes, but **not** possible for me to change because only 1 supplier in my area	2	→ GO TO A10
No not aware	3	→ GO TO A11

A10. In the last year have you switched natural gas suppliers? **(CODE ONE ONLY)**

Yes, switched from Phoenix Supply Ltd to firmus Energy	1
Yes, switched from firmus Energy to Phoenix Supply Ltd	2
No	3

ALL TO ANSWER

A11. Have you ever switched any of the following service providers? **(CODE ALL THAT APPLY)** **SHOWCARD**

Bank	1
Mortgage Provider	1
Insurance Provider	1
Land Line Provider	1
Mobile Phone Provider	1
Broadband Provider	1
TV (Sky, BT Vision etc)	1
Not switched any of the above	1

IF ANY AT A11 EQ 1 GO TO A12 ELSE GO TO A13

A12. Looking back what was the most important reason you switched service provider (s)? **(CODE ONE ONLY) UNPROMPTED**

Cheaper / Saving Money	1
Better product offered	2
Better service	3
Bad experience	4
Other (specify)	5

A13. And if you were considering switching electricity or gas supplier how would you **normally** chose or decide which supplier to go with? (WRITE IN)

IF A1 EQ 1 AND A7 EQ 1 AND A10 LE 2 go to B1 [gas]
IF A1 EQ 1 AND A7 EQ 1 AND A10 EQ 3 go to B1 [to a natural gas]

IF A1 EQ 1 AND A7 EQ 2 AND A10 LE 2 go to B1 [gas]
IF A1 EQ 1 AND A7 EQ 2 AND A10 EQ 3 go to C1 [gas]

IF A1 NE 1 AND A5 LE 4 go to B1 [electricity]
IF A1 NE 1 AND A5 EQ 5 go to C1 [electricity]

Section B: Switchers

B1. Why did you change your **[SUBSTITUTE]** supplier? **UNPROMPTED (CODE ALL THAT APPLY)**

Cheaper / Saving Money	1
Felt could get better service with new supplier	1
New supplier more environmentally friendly	1
Better product offered	1
Bad experience	1
Approached by another supplier	1
Moved house	1
Other (specify)	1

B2. Of the reasons you mentioned which is the most important reason why you changed **[SUBSTITUTE]** supplier? **(CODE ONE ONLY)**

Cheaper / Saving Money	1
Felt could get better service with new supplier	2
New supplier more environmentally friendly	3
Better product offered	4
Bad experience	5
Approached by another supplier	6
Other (specify)	7

B3. Would you consider switching **[SUBSTITUTE]** supplier again? **(CODE ONE ONLY)**

Yes	1	→ GO TO B4
No	2	→ GO TO B6

B4. What would be the key factor in your decision to switch **[SUBSTITUTE]** supplier in the future? **(CODE ONE ONLY) UNPROMPTED**

Cheaper / Saving Money	1
Felt could get better service with new supplier	2
New supplier more environmentally friendly	3
Better product offered	4
Bad experience	5
Other (specify)	6

B5. In percentage terms how much would you expect to save if you were to switch supplier in the future? INTERVIEWER RECORD ACTUAL PERCENTAGE

Don't Know	77

B6. What method(s) did you use to switch **[SUBSTITUTE]** supplier? **(CODE ALL THAT APPLY)**
SHOWCARD

Phone	1
Email / website	1
Wrote to supplier	1
Visited supplier	1
Supplier visited me	1
Other (please specify)	1

B7. How easy or difficult was it to switch **[SUBSTITUTE]** supplier? **(CODE ONE ONLY) SHOWCARD**

Very easy	1
Easy	2
Difficult	3
Very Difficult	4

B8. How satisfied or dissatisfied were you with the time it took to switch **[SUBSTITUTE]** supplier? **(CODE ONE ONLY) SHOWCARD**

Very satisfied	1
Satisfied	2
Dissatisfied	3
Very dissatisfied	4
Don't Know	5

B9. Do you feel you have saved money as a result of switching **[SUBSTITUTE]** supplier? **(CODE ONE ONLY)**

Yes	1	→ GO TO B10
No	2	→ GO TO B11
Too early to tell	3	→ GO TO B11
Don't Know	4	→ GO TO B11

B10. In percentage terms approximately what have you saved as a result of switching **[SUBSTITUTE]** supplier? INTERVIEWER RECORD ACTUAL PERCENTAGE

Don't Know	77

B11. Now that you have switched to a new supplier, do you expect their prices to increase, decrease or stay the same? **(CODE ONE ONLY) SHOWCARD**

Increase	1
Stay the same	2
Decrease	3
Don't Know	4

B12. Generally has your experience of switching **[SUBSTITUTE]** supplier been positive or negative? **(CODE ONE ONLY)**

Positive	1	→ GO TO B13
Negative	2	→ GO TO B14
Don't Know	3	→ GO TO B15

B13. Why has your experience been positive?

→ GO TO B15

B14. Why has your experience been negative?

B15. What for you has been the main benefit of switching **[SUBSTITUTE]** supplier? **(CODE ONE ONLY) UNPROMPTED**

Saved money	1
Better / improved service	2
Other Reason (please specify)	3
Don't Know	4

B16. Would you recommend to others that they switch **[SUBSTITUTE]** supplier? **(CODE ONE ONLY)**

Yes	1	→ GO TO B18
No	2	→ GO TO B17

B17. Why would you not recommend switching **[SUBSTITUTE]** supplier to others?

B18. When you switched **[SUBSTITUTE]** supplier, were you satisfied or dissatisfied that the service provided by your new supplier met your expectations?
(CODE ONE ONLY)
SHOWCARD

Very satisfied	1
Satisfied	2
Dissatisfied	3
Very dissatisfied	4
Don't Know	5

B19. When choosing **[SUBSTITUTE]** supplier, please say which of the following 7 factors is most important. **SHOWCARD**

Price	1
Convenience in terms of when I pay / frequency	2
Level of customer care	3
Support for vulnerable customers / customers in difficulty	4
Greenness of [substitute gas or electricity] supplied (e.g. amount of renewable / low carbon energy)	5
Image of the company (trust etc)	6
Convenience in terms of how I pay / payment method	7
Other (please specify)	8

Section C: Non Switchers

C1. Have you ever thought about changing your **[SUBSTITUTE]** supplier?
(CODE ONE ONLY) **SHOWCARD**

Never thought about switching supplier	1
Thought about switching but not switched yet	2
Thought about switching and will be switching in the future	3
Thought about switching and decided not to	4

C2. What is the main reason why you have not switched **[SUBSTITUTE]** supplier yet? **(CODE ONE ONLY) UNPROMPTED**

Too busy to get around to doing it	1
Too much hassle	2
Too time consuming	3
Bad experience of switching other services	4
Don't like change / uncertainty	5
Like service I get from my current supplier	6
Concerned alternative supplier would not provide a reliable supply	7
Concerned alternative supplier would not be as responsive if loss of supply	8
Don't believe price reductions would be as big as alternative suppliers claim	9
Worried that alternative supplier will increase price after I switch	10
Worried alternative supplier may not stay in the market for too long	11
I want to use a prepayment meter (not eligible)	12
Discount offered by other supplier too low	13
Worried about not having supply for a few days because of switch	14
Too much of a mess	15
Other Reason	16

C3. What level of discount, in percentage terms, would encourage you to switch to another **[SUBSTITUTE]** supplier? INTERVIEWER RECORD PERCENTAGE

Don't Know	77

C4. How likely or unlikely is it that you will switch **[SUBSTITUTE]** supplier in the future? **(CODE ONE ONLY) SHOWCARD**

Very likely	1	→ GO TO C5
Likely	2	→ GO TO C5
Unlikely	3	→ GO TO C7
Very unlikely	4	→ GO TO C7
Don't Know	5	→ GO TO C7

C5. When are you likely to switch **[SUBSTITUTE]** supplier? **(CODE ONE ONLY)**

Within the next month	1
Within the next 3 months	2
Within the next 6 months	3
Within the next year	4
Longer than a year	5
Don't Know	6

C6. What is the main reason why you are likely to switch **[SUBSTITUTE]** supplier in the future? **(CODE ONE ONLY) UNPROMPTED**

Cheaper / Saving Money	1
Felt could get better service with new supplier	2
New supplier more environmentally friendly	3
Better product offered	4
Bad experience with existing supplier	5
Approached by another supplier	6
Other (specify)	7

C7. What would an **[SUBSTITUTE]** supplier need to offer you to encourage you to switch tomorrow? RECORD VERBATIM RESPONSE

Nothing would make me switch	66
Don't Know	77

C8. How easy or difficult do you think it would be to switch **[SUBSTITUTE]** supplier? **(CODE ONE ONLY) SHOWCARD**

Very easy	1	→ GO TO C10
Easy	2	→ GO TO C10
Difficult	**3**	**→ GO TO C9**
Very Difficult	**4**	**→ GO TO C9**
Don't Know	5	→ GO TO C10

C9. Why do you feel it would be difficult to switch **[SUBSTITUTE]** supplier?

C10. If you did switch **[SUBSTITUTE]** supplier do you think prices with the new supplier would increase, decrease or stay the same over the next year? **(CODE ONE ONLY) SHOWCARD**

Increase	1
Stay the same	2
Decrease	3
Don't Know	4

C11. When choosing an **[SUBSTITUTE]** supplier, of the following 7 factors which do you feel is most important. **SHOWCARD**

Price	1
Convenience in terms of when I pay / frequency	2
Level of customer care	3
Support for vulnerable customers / customers in difficulty	4
Greenness of [substitute gas or electricity] supplied (e.g. amount of renewable / low carbon energy)	5
Image of the company (trust etc)	6
Convenience in terms of how I pay / payment method	7
Other (please specify)	8

Section D: Information Required by Consumers

SUBSTITUTE:
IF A1 EQ 1 [gas]
IF A1 NE 1 [electricity]

D1. Do you receive a bill from your **[SUBSTITUTE]** supplier? **(CODE ONE ONLY)**

Yes	1	➔ GO TO D2
No	2	➔ GO TO D8

D2. When you receive your **[SUBSTITUTE]** bill, do you actually open it? **(CODE ONE ONLY)**

Yes, always	1	➔ GO TO D3
Yes, sometimes	2	➔ GO TO D3
No, never open it	3	➔ GO TO D8

D3. Thinking about your **[SUBSTITUTE]** bill, please say whether you agree or disagree with the following statements? **(CODE FOR EACH) SHOWCARD**

	Strongly Agree	Agree	Neither	Disagree	Strongly Agree
It contains all the information I need	1	2	3	4	5
It contains too much information	1	2	3	4	5
It is easy to understand	1	2	3	4	5
It confuses me	1	2	3	4	5
The information on my bill could be more clearly presented	1	2	3	4	5

D4. Thinking about your **[SUBSTITUTE]** bill, do you read the following? **(CODE ALL THAT APPLY) SHOWCARD**

Previous balance / amounts paid to date	1
Consumption this period	1
Billing dates – applicable / reference period	1
Unit Cost	1
Total amount due	1
Due date	1
Supplier Messages	1
Comparison of consumption with same period last year	1
Customer Service info / contact details	1
Consumer rights / support information / contact details	1
Fuel Mix and Environmental Impact Info	1
Ways to pay the bill	1
Other (please specify)	1
NONE OF ABOVE	1

Non Gas Customers Only (d5, d6, d7) who receive a bill (I.E. A1 NE 1 AND D1 EQ 1

D5. How important or unimportant is it to you personally that information on the environmental impact and carbon content of electricity supplied to you in the previous year is shown on or with your bill? **(CODE ONE ONLY) SHOWCARD**

Very Important	1
Important	2
Not very important	3
Not at all important	4

D6. Did you know that information on the environmental impact and carbon content of electricity supplied to you in the previous year is shown on or with your bill? **(CODE ONE ONLY)**

Yes	1	→ GO TO D7
No	2	→ GO TO D8

D7. Do you find this information on the environmental impact and carbon content of electricity easy or difficult to understand? **(CODE ONE ONLY) SHOWCARD**

Very easy	1
Easy	2
Difficult	3
Very Difficult	4
Don't Know	5
Never Read It	6

All Customers
SUBSTITUTE:
IF A1 EQ 1 [gas]: IF A1 NE 1 [electricity]

D8. How often would you like to receive your **[SUBSTITUTE]** bill? **(CODE ONE ONLY)**

Monthly	1
Quarterly	2
Every 6 months	3
Yearly	4
Other (specify)	5

D9. Why would you like to receive your **[SUBSTITUTE]** bill at this time?

D10. Your **[SUBSTITUTE]** bill can be provided in different formats. What format would you prefer to receive your **[SUBSTITUTE]** bill? **(CODE ONE ONLY) SHOWCARD**

Paper copy through the post	1
In home electronic device	2
Through my TV	3
Email	4
Supplier Website (my account)	5
Text Message	6
Other (specify)	7

D11. As a customer is there any other information you would like to receive from your **[SUBSTITUTE]** supplier? **(CODE ONE ONLY)**

Yes	1	→ GO TO D12
No	2	→ GO TO D14

D12. What other information would you like to receive from your **[SUBSTITUTE]** supplier?
INTERVIEWER RECORD UP TO 2 RESPONSES

1.
2.

D13. How would you like to receive this information? **UNPROMPTED (CODE ALL THAT APPLY)**

With / on my bill	1
Leaflets	1
Advertising	1
Email	1
Text messaging	1
Telephone call from my energy supplier	1
Other (please specify)	1

D14. As a customer do you feel you need more information or less information on your rights as a customer of energy companies? **(CODE ONE ONLY)**

More	1
Less	2
Happy with current provision	3

D15. As a customer what type of information on your rights would you find most useful?
(CODE ALL THAT APPLY) UNPROMPTED

List of your rights	1
List of relevant legislation	1
Contact details of an advice organization (e.g. CAB)	1
Consumer Council for Northern Ireland's contact details	1
Contact within the company	1
Other (please specify)	1
Don't Know	1

D16. For you what is the best way to receive information on your rights as a customer of energy companies? **(CODE ONE ONLY) UNPROMPTED**

On bills	1
Leaflets / information with bills	2
TV Advertising	3
Radio Advertising	4
Newspapers	5
Advice Organisations	6
Awareness campaign by energy companies	7
Awareness campaign by independent organizations	8
Other (please specify)	9

Section E: Commitment to Energy Efficiency and Views on Tariffs

E1. Would you consider doing any of the following in the next year? **(CODE ALL THAT APPLY) SHOWCARD**

	Yes	No	Don't
Having energy efficiency measures installed	1	2	3
Changing your behavior to use less energy	1	2	3
Switching to a greener or more environmentally friendly supply to reduce your carbon footprint	1	2	3

E2. Are you willing to pay more for…? **(CODE FOR EACH) SHOWCARD**

	Yes	No	Don't
Northern Ireland to meet its renewable energy targets?	1	2	3
Northern Ireland to meet its energy efficiency targets?	1	2	3

E3. Are you prepared to pay more for greener energy? **(CODE ONE ONLY)**

Yes	1	→ GO TO E4
No	2	→ GO TO E5

E4. In percentage terms how much more would you be prepared to pay for greener energy?

Don't Know	77

E5. Would you be willing to pay more to subsidize the price of energy for vulnerable groups? **(CODE ONE ONLY)**

Yes	1
No	2
Maybe	3

E6. Why do you say that?

E7. If the following information could be provided to you, would you find this useful or not useful? **(CODE FOR EACH) SHOWCARD**

	Very Useful	Useful	Not very useful	Not at all useful
A breakdown of which appliances contribute most to your household bill	1	2	3	4
Breakdown of which rooms are using most energy	1	2	3	4
Details of current usage compared with previous periods	1	2	3	4
Usage at peak times	1	2	3	4
Discounts given for using energy at different times	1	2	3	4
Information on how to reduce your bill	1	2	3	4
Which country the energy comes from	1	2	3	4

E8 AND E9 ONLY ASKED OF NON GAS CUSTOMERS I.E. A1 NE 1

E8. If you had the opportunity to change your electricity use to an off-peak time and save money (e.g. from day time to evening or night time) how likely or unlikely would you be to do this? **(CODE ONE ONLY)** **SHOWCARD**

Very Likely	1	→ GO TO E10
Likely	2	→ GO TO E10
Unlikely	3	→ GO TO E9
Very Unlikely	4	→ GO TO E9
Don't Know	5	→ GO TO E10

E9. Why would you be unlikely to switch your electricity use to off-peak times? **UNPROMPTED (CODE ALL THAT APPLY)**

Savings would be minimal	1
Too inconvenient / disruptive	1
Will need to use electricity whenever and this would be too disruptive	1
Safety concerns with leaving appliances on	1
Too noisy (e.g. dishwasher on at night)	1
Other reason (please specify)	1

E10. How would you rate your awareness of how much energy you are using in your home? **(CODE ONE ONLY)** **SHOWCARD**

Excellent	1
Good	2
Fair	3
Poor	4
Very Poor	5
Don't Know	6

E11. Is the use of energy in your home something that you think about? **(CODE ONE ONLY)** **SHOWCARD**

Frequently	1
Occasionally	2
Not very often	3
Rarely	4
Never	5

E12. When using energy in your home, do you think of it mainly in terms of how much it costs or the actual amount of energy you are using? **(CODE ONE ONLY)**

Cost	1
Amount of energy used	2
Don't think about it	3
Other (please specify)	4

E13. If you had a way of seeing how much energy you were using in real time in your home, would this help you to use energy more efficiently in your home? **(CODE ONE ONLY)**

Yes	1
No	2
Don't Know	3

E14. Why do you say this?

E15. Thinking about the price charged for electricity / gas, how do you believe that electricity / gas in N Ireland compares to that in other European countries such as the Republic of Ireland, Great Britain, France, Germany or Spain? **(CODE ONE ONLY)**

More expensive	1	→ GO TO E16
The same	2	→ GO TO F1
Less expensive	3	→ GO TO E17
Don't Know	4	→ GO TO F1

E16. Why do you think electricity / gas prices are more expensive in N Ireland?

E17. Why do you think electricity / gas prices are less expensive in N Ireland?

Section F: Image and Branding

INTERVIEWER TO SHOW COMPANY BRAND LOGO / NAME AND ASK F1 FOR EACH

F1. I would like to ask your opinion about a number of different organizations. I am going to read out the names of some organizations and show you their logo. Using the categories on this card, I would like you to tell me how well you feel you know each. In making your choice, take into account any of the ways you have learned or heard about the organization. **(CODE FOR EACH) SHOWCARD**

	Never heard of it	Heard of it / know almost nothing about it	Know just a little	Know a fair amount	Know very well
firmus Energy	1	2	3	4	5
Phoenix Supply Ltd	1	2	3	4	5
Phoenix Energy Services	1	2	3	4	5
Phoenix Natural Gas	1	2	3	4	5
NIE Ltd	1	2	3	4	5
NIE Energy	1	2	3	4	5
Airtricity	1	2	3	4	5

ASKED OF RESPONDENTS AWARE OF EACH AT F1 (PROGRAMME AS A LOOP)

F2. Now I am going to read out the organizations again, and this time I would like you to tell me how favourable or unfavourable your overall opinion and impression of each is. Please take into account any of the things which you feel are important. Remember that it is your overall opinion and impression that we are interested in. **(CODE FOR EACH) SHOWCARD**

	Very favourable	Mainly favourable	Neither	Very unfavourable	No opinion	Don't Know
firmus Energy	1	2	3	4	5	6
Phoenix Supply Ltd	1	2	3	4	5	6
Phoenix Energy Services	1	2	3	4	5	6
Phoenix Natural Gas	1	2	3	4	5	6
NIE Ltd	1	2	3	4	5	6
NIE Energy	1	2	3	4	5	6
Airtricity	1	2	3	4	5	6

F3. Looking at the following list of responsibilities, please select which you believe NIE Energy Supply is responsible for and which NIE Ltd is responsible for? **(CODE FOR EACH) SHOWCARD**

	NIE Energy	NIE Ltd	Neither	Don't know
Generation of electricity	1	2	3	4
Repairing power failures	1	2	3	4
Maintenance of the electricity grid	1	2	3	4
Billing and payment	1	2	3	4
Seeking approval of prices from the regulator	1	2	3	4
Reading the meter	1	2	3	4

ASK OF PHOENIX GAS CUSTOMERS ONLY I.E. A10 EQ 1 ELSE GO TO F4

F4. Looking at the following list of responsibilities, please select which you believe Phoenix Supply Limited is responsible for, which Phoenix Energy Services and which Phoenix Natural Gas is responsible for? **(CODE FOR EACH) SHOWCARD**

	Phoenix Supply Limited	Phoenix Energy Services	Phoenix Natural Gas	None	Don't know
Repairing/Correcting unplanned interruptions to gas supply	1	2	3	4	5
Maintenance of the gas pipes and infrastructure	1	2	3	4	5
Billing and payment	1	2	3	4	5
Seeking approval of prices from the regulator	1	2	3	4	5
Reading the meter	1	2	3	4	5

ONLY AKS IF AWARE OF EACH ORGANISATION AT F1

F5. What words or phrases would you MOST associate with NIE Energy, Airtricity, Phoenix Supply Ltd and firmus Energy) (Select three options for each) **(CODE FOR EACH) SHOWCARD**

	NIE Energy	Airtricity	Phoenix Supply Ltd	firmus Energy
Efficient				
Value for money				
Strong				
Monopoly				
Reliable				
Modern				
Committed to renewable energy				
Trustworthy				
Helping the consumer reduce their energy use				
Good customer service when I have a query or a problem				
Clear and easy to understand bills and information				
Other (specify)				

F6. What words or phrases would you LEAST associate with NIE? (Please pick 3 in order of priority) **(CODE FOR EACH)** **SHOWCARD**

	NIE Energy	Airtricity	Phoenix Supply Ltd	firmus Energy
Efficient				
Value for money				
Strong				
Monopoly				
Reliable				
Modern				
Committed to renewable energy				
Trustworthy				
Helping the consumer reduce their energy use				
Good customer service when I have a query or a problem				
Clear and easy to understand bills and information				
Other (specify) **REMOVE**				

Section G: Background Questions

G1 **INTERVIEWER Record gender**

Male	1
Female	2

G2. What was your age last birthday? **INTERVIEWER RECORD AGE**

G3. What is your marital status? **SHOWCARD**
SINGLE CODE ONLY

Single	1
Married	2
Living as married	3
Separated	4
Divorced	5
Widowed	6
Civil Partnership	7

G4 How many dependents do you have aged 16 or under?

G5 What is the occupation of the chief income earner in your household?
INTERVIEWER RECORD

G6. **INTERVIEWER RECORD SEG OF CHIEF INCOME EARNER**
SINGLE CODE ONLY

ABC1	1
C2DE	2

G7 What is your employment status? **SHOWCARD**

Self-employed	1
Working Full-time	2
Working Part-time	3
Seeking work for the first time	4
Unemployed, i.e. not working but actively seeking work	5
Looking after home and family	6
Unable to work due to permanent illness or disability	7
Not actively seeking work but would like to work	8
Not working and not seeking work	9
On a government scheme	10
Retired	11
Student	12
Other (Please specify)	13
Refused	14

G8. What is your highest educational qualification? **SHOWCARD**

Degree Level or higher	1
BTEC (Higher), BEC (Higher), TEC (Higher), HNC,HND	2
GCE A'Level (including NVQ Level 3)	3
BTEC (National), BEC (National), TEC (National), ONC, OND	4
GCSE (including NVQ Level 2), GCE O'Level (including CSE Grade 1), Senior Certificate, BTEC (General), BEC (General)	5
CSE (Other than Grade 1)	6
Other (Please specify)	7
No formal qualification	8
Refused	9

G9. Do you live in an urban or rural area?
SINGLE CODE ONLY

Urban – City, Large Town, Suburban	1
Rural – Small Town, Village, Country	2

G10. What is your postcode?
INTERVIEWER RECORD

B	**T**						

G11. Do you have any long-term illness, health problem or disability which limits your daily activities or the work you can do? Include problems which are due to ageing. **SINGLE CODE ONLY**

Yes	1
No	2

G12. Does anyone else in your household have a long term illness, health problem or disability?

Yes	1
No	2

G13. What is your housing status? **SHOWCARD**

Owned outright	1
Owned with a mortgage	2
Private Tennant	3
Housing Association	4
NI Housing Executive	5
Other (please specify)	6

G14 Does your household have access to the internet?

Yes	1
No	2

G15. INTERVIEWER RECORD LOCAL GOVERNMENT DISTRICT

Antrim	1	Down	14
Ards	2	Dungannon	15
Armagh	3	Fermanagh	16
Ballymena	4	Larne	17
Ballymoney	5	Limavady	18
Banbridge	6	Lisburn	19
Belfast	7	Magherafelt	20
Carrickfergus	8	Moyle	21
Castlereagh	9	Newry & Mourne	22
Coleraine	10	Newtownabbey	23
Cookstown	11	North Down	24
Craigavon	12	Omagh	25
Derry	13	Strabane	26

CLOSE INTERVIEW AND THANK RESPONDENT