NIE Networks Consumer research

Overview report - domestic & business
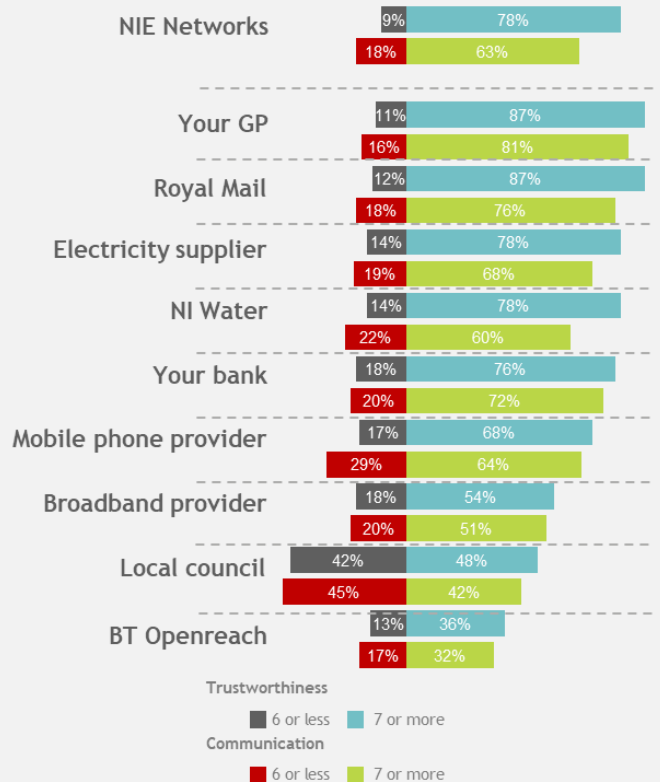
January 2020

RESULTS OF A 2019 SURVEY WITH DOMESTIC CUSTOMERS

Northern Ireland Electricity Networks

NIE NETWORKS' NET PROMOTER SCORE

DETRACTORS		PROMOTERS	
27%	35%	39%	**12** NPS score
0 - 6	7 - 8	9 - 10	

PERCEPTIONS OF SERVICE PROVIDERS

NIE Networks
- 9% / 78%
- 18% / 63%

Your GP
- 11% / 87%
- 16% / 81%

Royal Mail
- 12% / 87%
- 18% / 76%

Electricity supplier
- 14% / 78%
- 19% / 68%

NI Water
- 14% / 78%
- 22% / 60%

Your bank
- 18% / 76%
- 20% / 72%

Mobile phone provider
- 17% / 68%
- 29% / 64%

Broadband provider
- 18% / 54%
- 20% / 51%

Local council
- 42% / 48%
- 45% / 42%

BT Openreach
- 13% / 36%
- 17% / 32%

Trustworthiness
- 6 or less
- 7 or more

Communication
- 6 or less
- 7 or more

! 35% are unsure of NIE Networks' role

! 62% believe NIE Networks is responsible for generating and / selling electricity
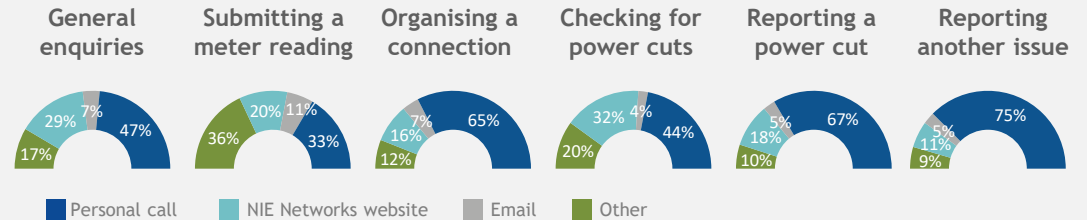
RECENT EXPERIENCE WITH NIE NETWORKS

% who have experienced a **planned** power cut

% who have experienced an un**planned** power cut

14% have experienced **a planned power cut** in the last 12 months.

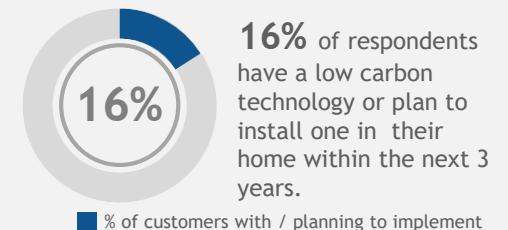**13%** experienced an unplanned power cut in the same time period.

86% would like a notification card to inform them of planned power cuts. Three quarters (75%) stated this would be their first preference.
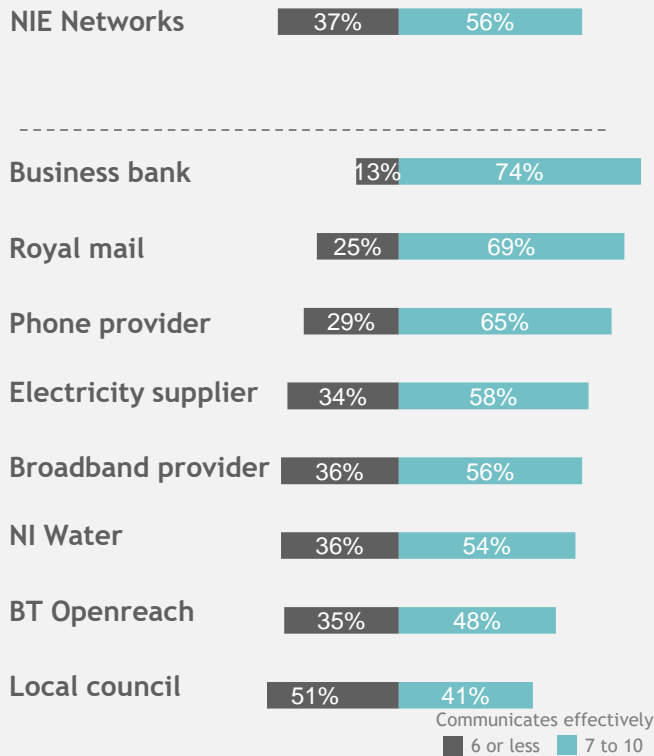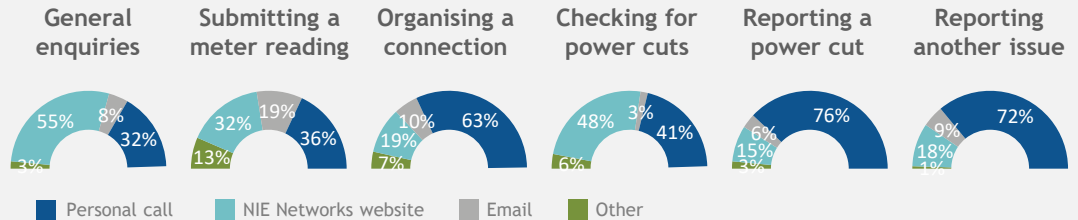
PREFERRED COMMUNICATION CHANNELS

General enquiries
- 29% / 7% / 47% / 17%

Submitting a meter reading
- 20% / 11% / 36% / 33%

Organising a connection
- 7% / 16% / 65% / 12%

Checking for power cuts
- 32% / 4% / 20% / 44%

Reporting a power cut
- 5% / 18% / 10% / 67%

Reporting another issue
- 5% / 11% / 9% / 75%

- Personal call
- NIE Networks website
- Email
- Other

FUTURE NETWORKS

75% — **3 quarters** consider the issue of climate change to be extremely or quite important to them personally.

% of customers agreeing

16% — **16%** of respondents have a low carbon technology or plan to install one in their home within the next 3 years.

% of customers with / planning to implement

This study was conducted by the independent research company: **perceptive insight**

RESULTS OF A 2019 SURVEY WITH BUSINESS CUSTOMERS

Northern Ireland Electricity Networks

NIE NETWORKS' NET PROMOTER SCORE

22%	32%	46%
0 - 6	7 - 8	9 – 10

24 NPS score

PERCEPTIONS OF SERVICE PROVIDERS

Provider	6 or less	7 to 10
NIE Networks	37%	56%
Business bank	13%	74%
Royal mail	25%	69%
Phone provider	29%	65%
Electricity supplier	34%	58%
Broadband provider	36%	56%
NI Water	36%	54%
BT Openreach	35%	48%
Local council	51%	41%

Communicates effectively
■ 6 or less ■ 7 to 10

! **19% are unsure of NIE Networks' role**

! **60% believe NIE Networks is responsible for generating and / selling electricity**

RECENT EXPERIENCE WITH NIE NETWORKS

% who have experienced a **planned** power cut

% who have experienced an **unplanned power cut**

20% have experienced **a planned power cut** in the last 12 months.

31% who said they have experienced an **unplanned power cut** within the same time period.

! **70%** would like a notification card to inform them of planned power cuts. More than half (55%) stated this would be their first preference.

PREFERRED COMMUNICATION CHANNELS

General enquiries	Submitting a meter reading	Organising a connection	Checking for power cuts	Reporting a power cut	Reporting another issue
55% 8%	32% 19%	10% 63%	48% 3%	6% 76%	9% 72%
3% 32%	13% 36%	19% 7%	6% 41%	15% 3%	18% 1%

■ Personal call   ■ NIE Networks website   ■ Email   ■ Other

FUTURE NETWORKS

72%

7 out of 10 consider the issue of climate change to be extremely or quite important to their organisation.

■ % of organisations agreeing

32%

Almost a third of businesses have a low carbon technology or plan to install one at their business within the next 3 years.

■ % of organisations with / planning to implement

This study was conducted by the independent research company: **perceptive insight**

Introduction & approach

Aim and approach

Aim

- In November 2019, NIE Networks commissioned Perceptive Insight to undertake a survey of domestic customers and a survey of businesses in Northern Ireland (a similar study was undertaken in 2015).
- The aim of the study was to:

    - Ascertain businesses' perceptions of different service providers, including NIE Networks;
    - Establish the extent to which respondents understand the role of NIE Networks;
    - Determine experience with and overall levels of satisfaction with NIE networks;
    - Gain an understanding of customers' preferred methods of contact and communication channels; and
    - Identify level of intent to uptake low carbon technologies in the future.

Approach

Domestic survey
- 510 face-to-face interviews were conducted between 8-19 Dec 2019;
- Quotas were applied to the survey to ensure a range of customers were interviewed;
- Findings for both surveys were analysed using Perceptive Insight's specialist survey software.

Business survey
- 213 telephone interviews were conducted between 4-18 Nov 2019;
- Stratification by size and sector was applied to the data to ensure a range of business types were interviewed;
- Upon completion of the fieldwork, the data was weighted by business size to ensure representation.

Perceptions of different service providers

Domestic

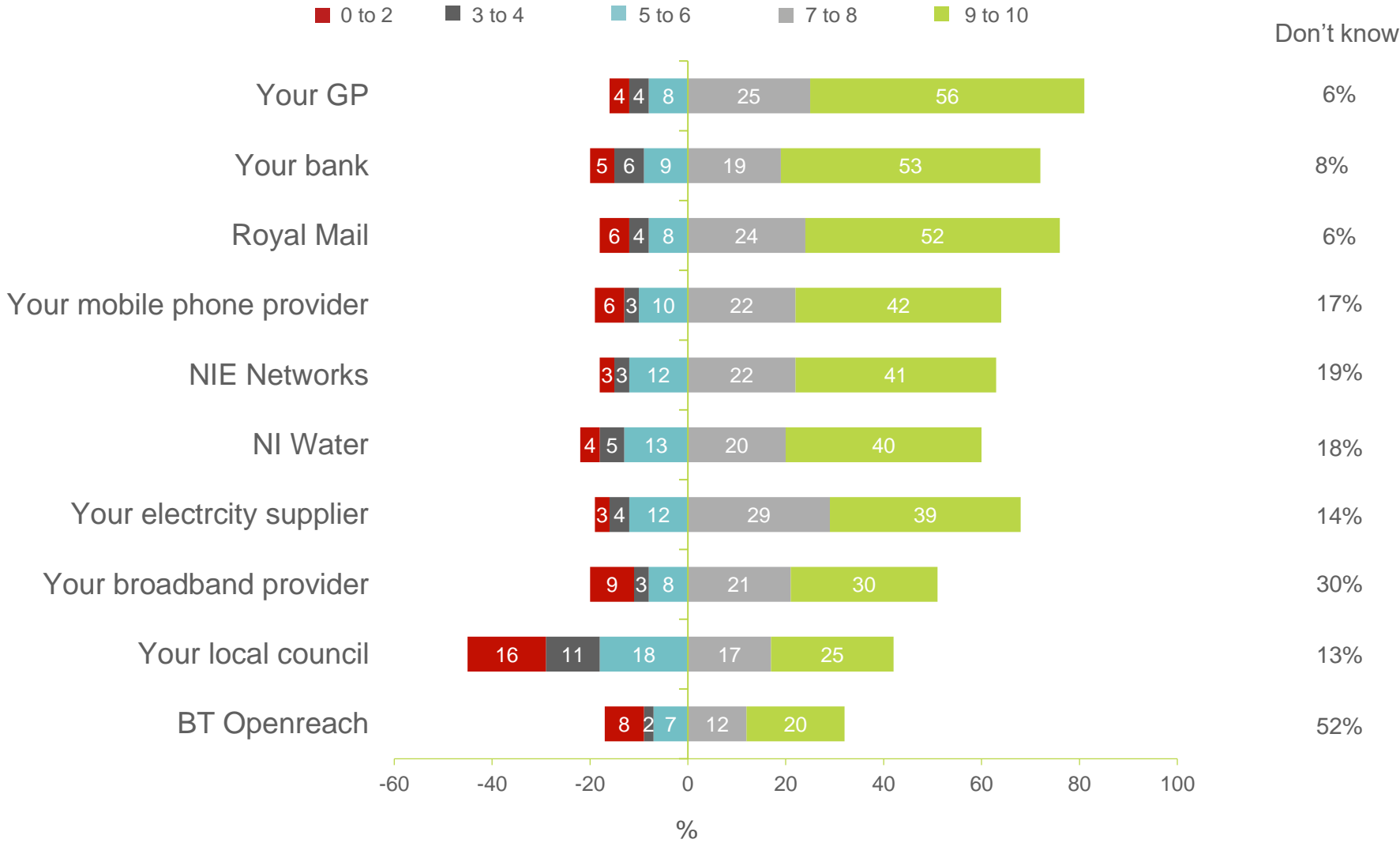# A1 How would you rate each of the following services on their trustworthiness?

Legend: ■ 0 to 2 ■ 3 to 4 ■ 5 to 6 ■ 7 to 8 ■ 9 to 10

Service	0 to 2	3 to 4	5 to 6	7 to 8	9 to 10	Don't know
Your GP	2	1	8	24	63	2%
Royal Mail	1	2	9	28	59	1%
Your bank	4	5	9	22	54	6%
NIE Networks		2	7	27	51	12%
NI Water	1	4	9	30	48	10%
Your electricity supplier		3	10	31	47	9%
Your mobile phone provider	4	4	9	27	41	14%
Your broadband provider	6	5	7	28	26	27%
Your local council	15	9	18	25	23	11%
BT Openreach	4	2	7	16	20	56%

%
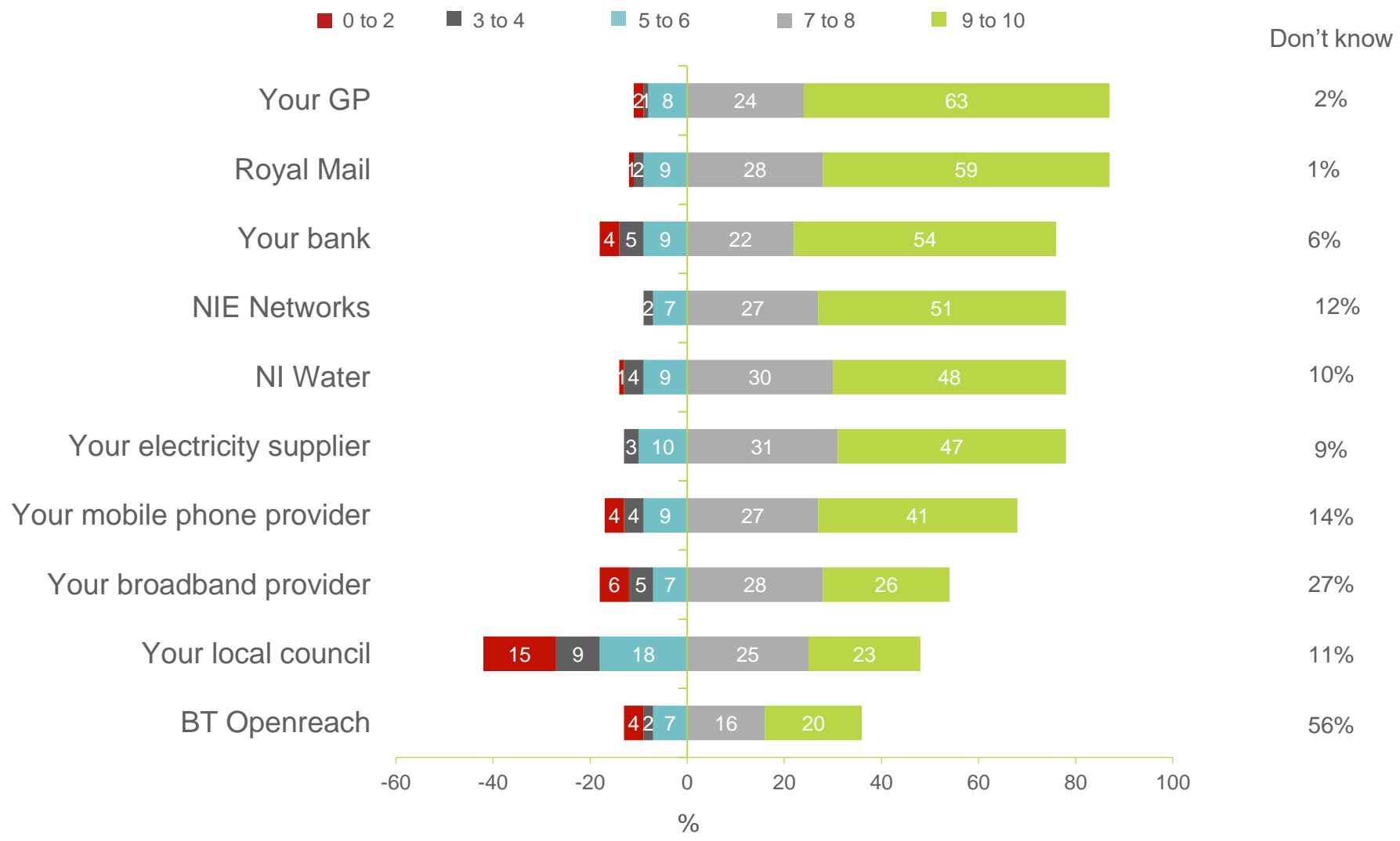
¹ Answered on a scale where 0 is do not trust at all and 10 is trust completely

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A2 How would you rate each of the following services on their communication?

Legend: ■ 0 to 2 ■ 3 to 4 ■ 5 to 6 ■ 7 to 8 ■ 9 to 10

Don't know

Service	0 to 2	3 to 4	5 to 6	7 to 8	9 to 10	Don't know
Your GP	4	4	8	25	56	6%
Your bank	5	6	9	19	53	8%
Royal Mail	6	4	8	24	52	6%
Your mobile phone provider	6	3	10	22	42	17%
NIE Networks	3	3	12	22	41	19%
NI Water	4	5	13	20	40	18%
Your electrcity supplier	3	4	12	29	39	14%
Your broadband provider	9	3	8	21	30	30%
Your local council	16	11	18	17	25	13%
BT Openreach	8	2	7	12	20	52%

%

[1] Answered on a scale where 0 is does not communicate effectively and 10 is communicates very effectively

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Business

A1 In relation to your organisation, how would you rate each of the following in terms of communication

Legend: ■ 0 to 2　■ 3 to 4　■ 5 to 6　■ 7 to 8　■ 9 to 10

Organisation	0 to 2	3 to 4	5 to 6	7 to 8	9 to 10	Don't know
Royal Mail	10	6	9	26	43	5%
Your business bank	1	2	10	31	43	11%
Your electricity supplier	11	4	19	21	37	6%
NIE Networks	16	10	11	24	32	7%
Your phone provider	11	2	16	33	32	6%
NI Water	20	4	12	25	29	10%
Your broadband provider	13	7	16	27	29	9%
BT Openreach	16	6	13	23	25	18%
Your local council	17	12	22	21	20	8%

%

¹ Due to rounding percentages add to 99%-101%

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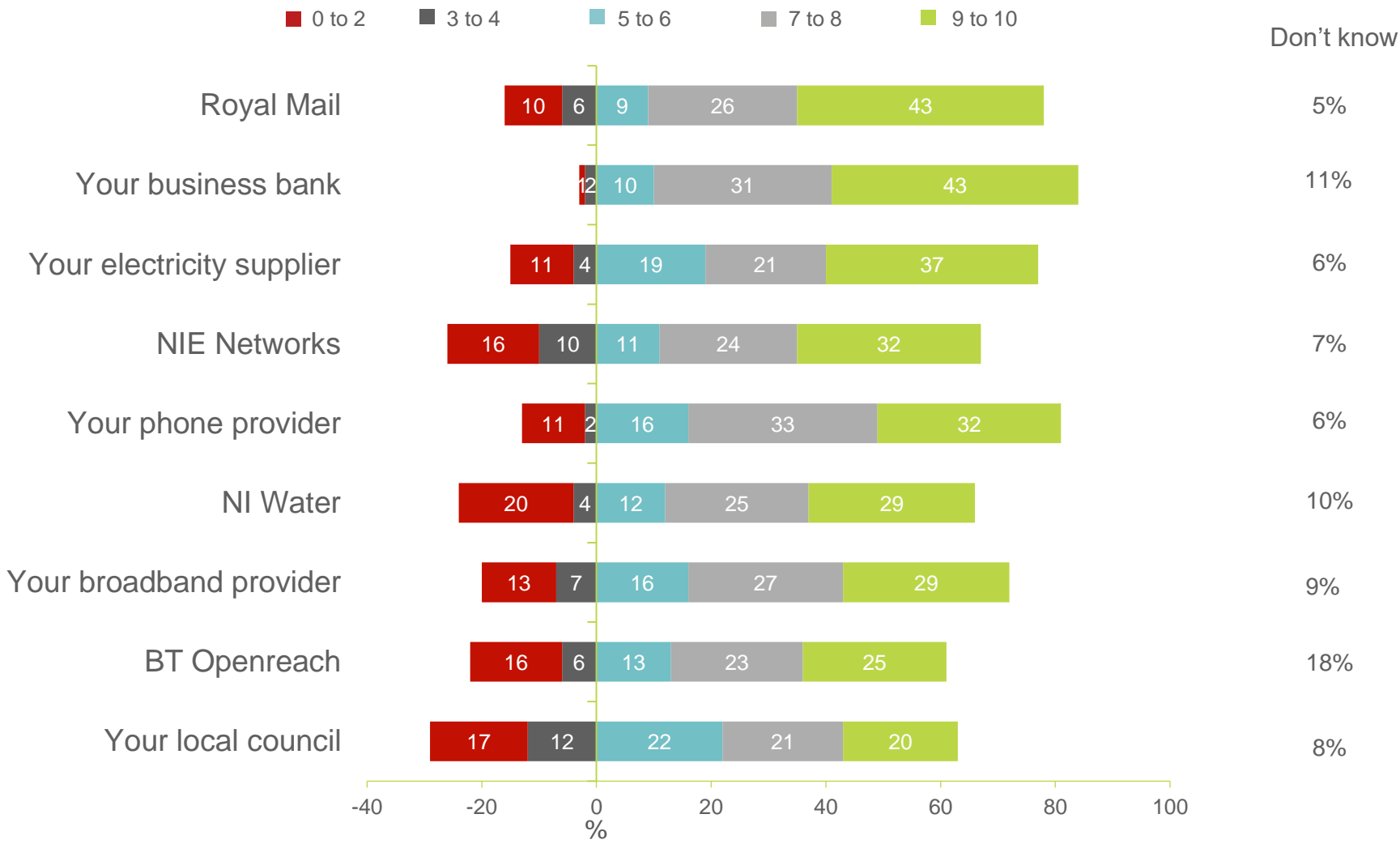
Views of NIE Networks

Domestic

B1 How would you describe the role of NIE Networks to a friend?

35% of respondents said that they were unsure of NIE Networks' role

B2 Which of the following is NIE Networks responsible for?

62% of respondents said NIE Networks is responsible for generating electricity or selling electricity.

Category	%
Maintaining power lines and substation	85
Fixing the fault if there is a power cut	87
Installing and reading your meter	74
Connecting new customers to the electricity network	68
Generating the electricity	56
Selling the electricity	35
Don't know enough to comment	7

[1] Multiple response question, therefore percentages add to >100%

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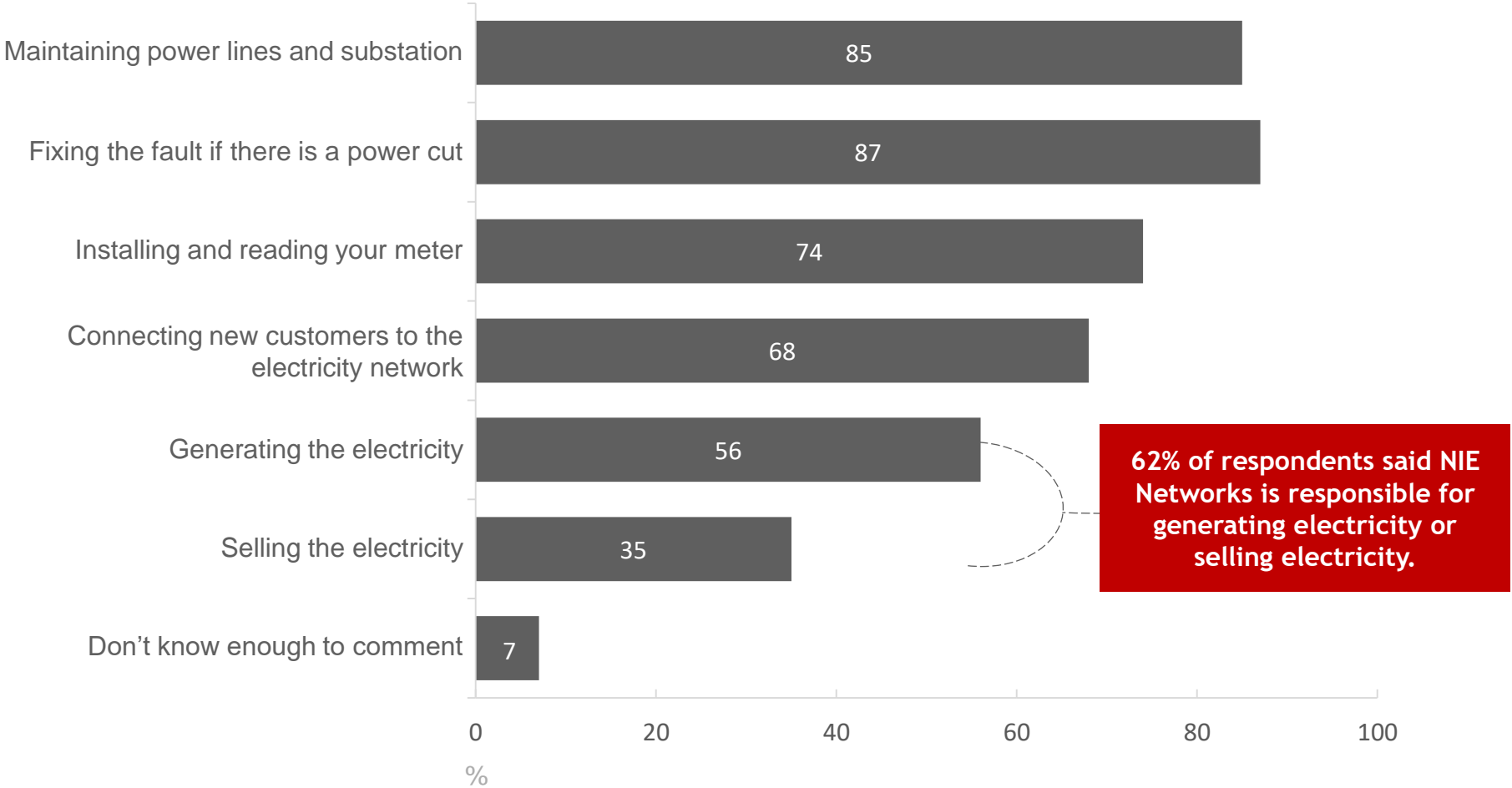
B3 Which single phrase best describes the way you would speak to friends and relatives about the service provided by NIE Networks?
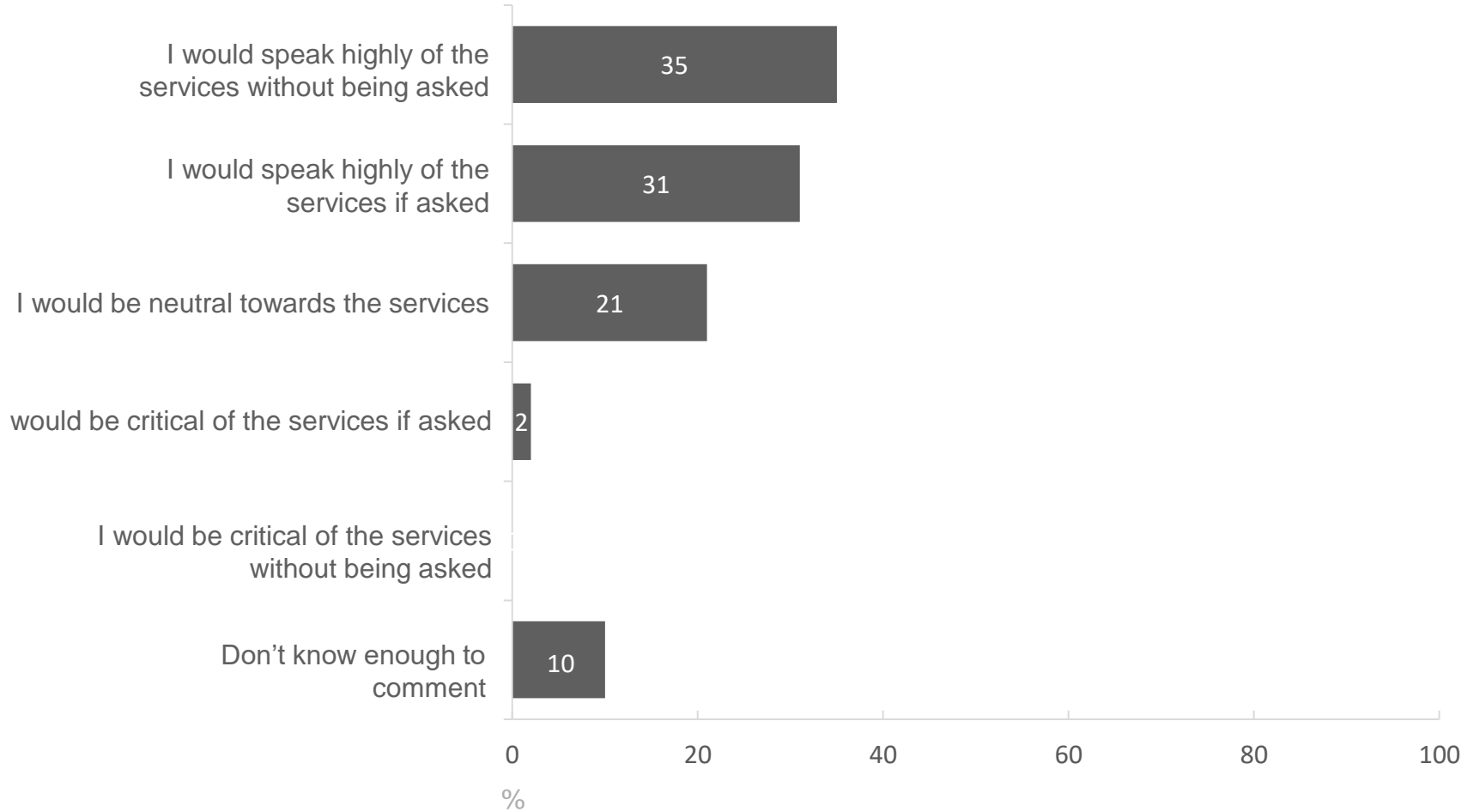
B5 How likely are you to recommend NIE Networks to a friend or colleague?

B5 How likely are you to recommend NIE Networks to a friend / colleague?

Net promoter score

NPS = promoters (scoring 9 or 10) – detractors (scoring 1 to 6)

Detractors 27%

Promoters 39%

Passives 35%
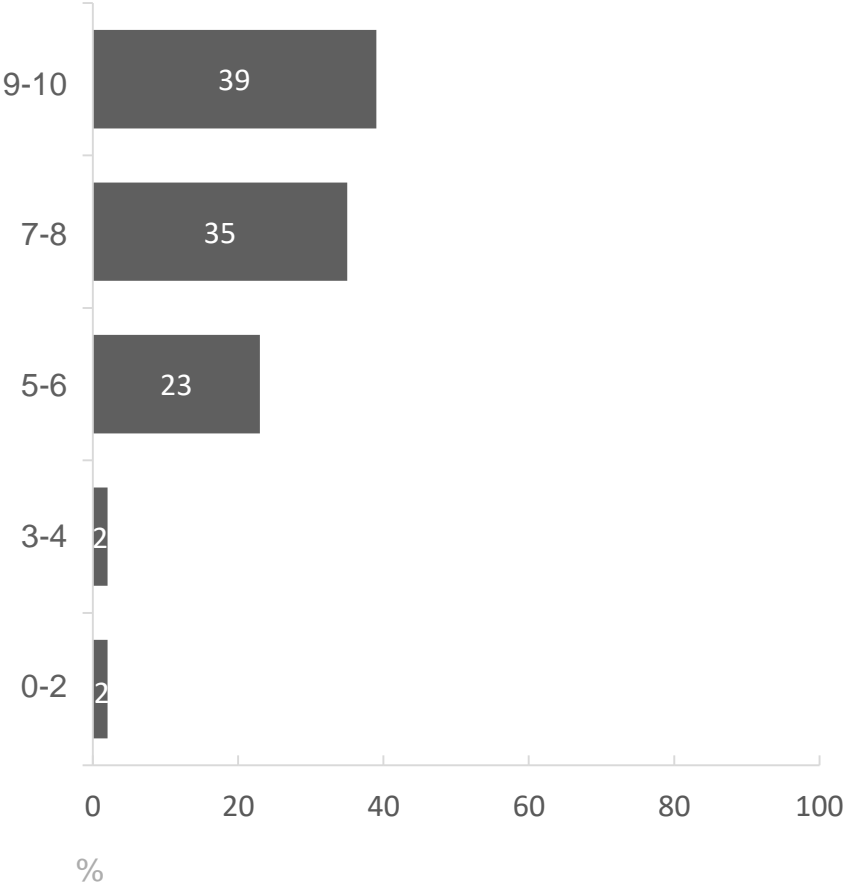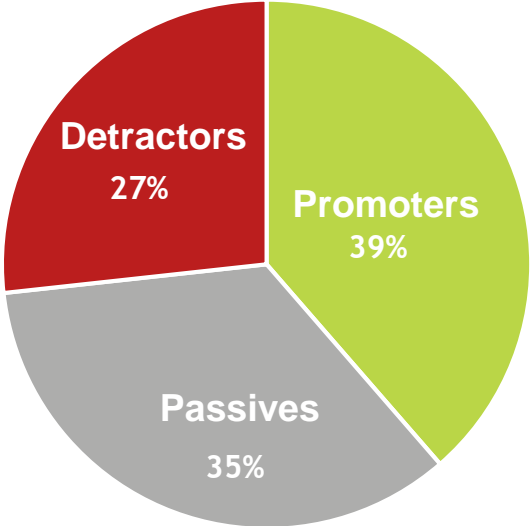
NPS score = **12**

[1] Answered on a scale where 0 very unlikely and 10 is very likely to recommend

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Business

B1 How would you describe the role of NIE Networks to a colleague? (Unprompted response)

19% of respondents (base=40) said that they were unsure of NIE Networks' role

B2 Which of the following is NIE Networks responsible for? (Prompted response)
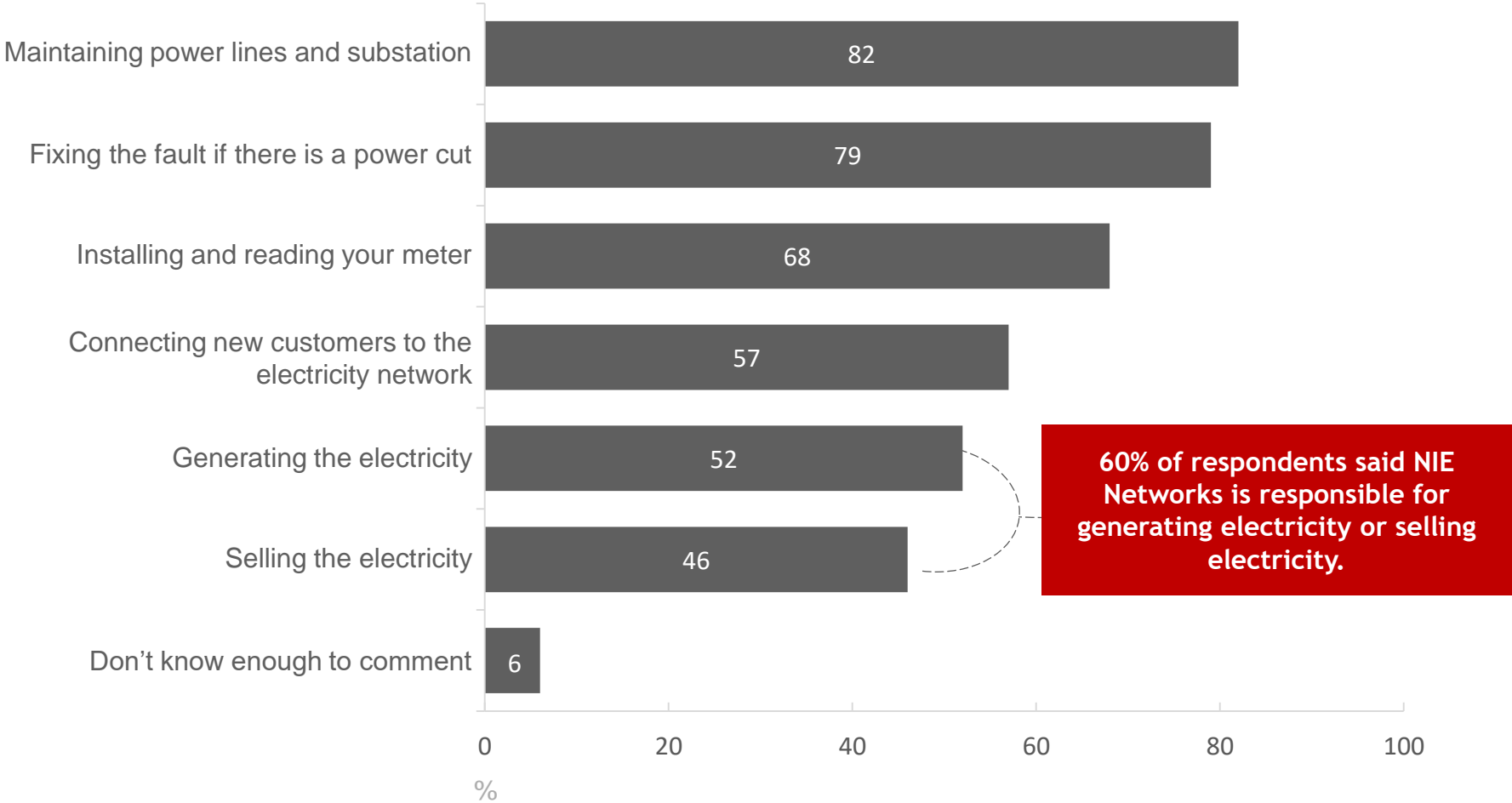
Maintaining power lines and substation — 82
Fixing the fault if there is a power cut — 79
Installing and reading your meter — 68
Connecting new customers to the electricity network — 57
Generating the electricity — 52
Selling the electricity — 46
Don't know enough to comment — 6

60% of respondents said NIE Networks is responsible for generating electricity or selling electricity.

[1] Multiple response question, therefore percentages add to >100%

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B3 Which single phrase best describes the way you would speak to colleagues about the electricity services provided by NIE Networks?

2015 results
Base=507 (weighted data)

Response	%	2015
I would speak highly of the services if asked	4	11%
I would speak highly of the services without being asked	42	42%
I would be neutral towards the services	43	38%
I would be critical of the services if asked	3	4%
I would be critical of the services without being asked	1	4%
Don't know enough to comment	7	3%

%

[1] Due to rounding percentages add to 99%-101%

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25
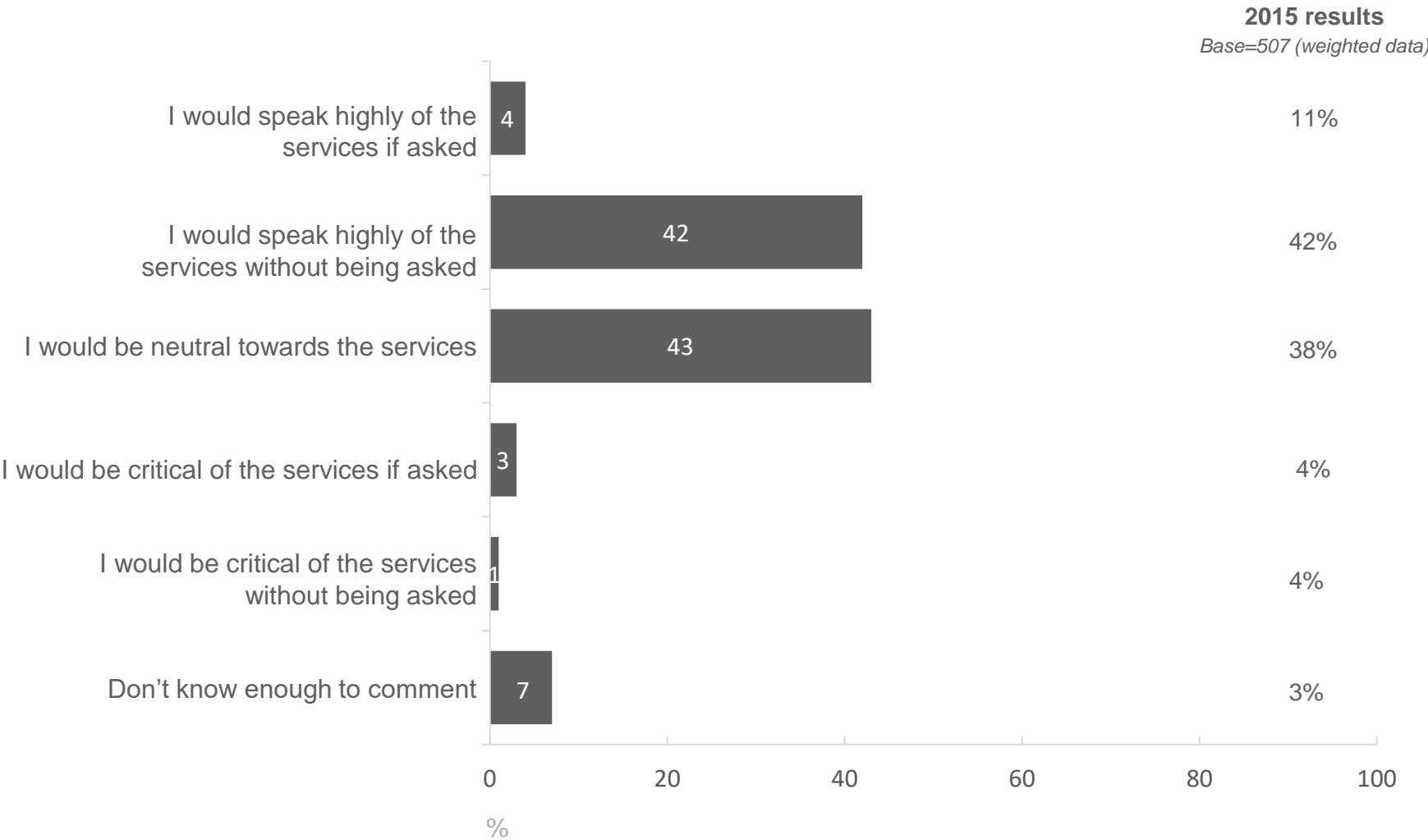
Likelihood to recommend and NPS

B5 How likely are you to recommend NIE Networks to a friend / colleague?

9-10	46
7-8	32
5-6	14
3-4	7
0-2	

0   20   40   60   80   100

%

Net promoter score

NPS = promoters (scoring 9 or 10) – detractors (scoring 1 to 6)

Detractors 22%

Promoters 46%

Passives 32%
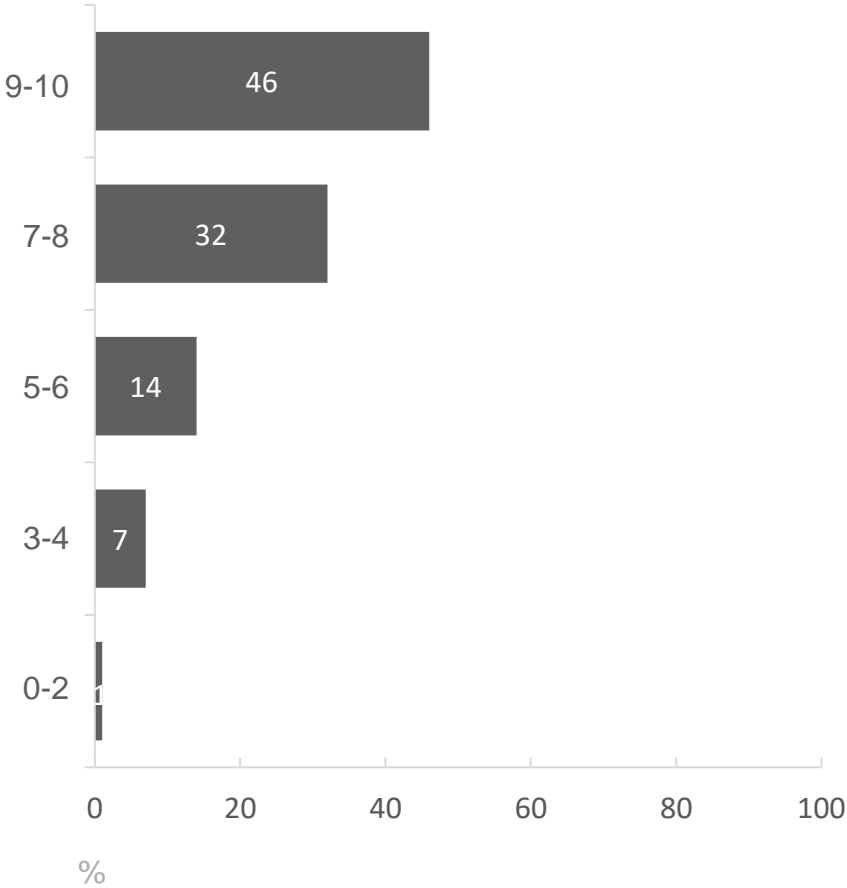
NPS score = **24**

[1] Answered on a scale where 0 very unlikely and 10 is very likely to recommend
[2] Due to rounding percentages add to 99%-101%

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Recent experience with NIE Networks

Domestic

C1 Have you had a planned power cut in the last 12 months?

% saying yes

2015 results
Base=1205

Category	%	2015 results
Overall	14	20%
Urban	12	14%
Rural	15	33%

%

[1] 2011 census
[1] Due to rounding percentages add to 99%-101%

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C2 Thinking about the last 12 months, how many times have you experienced a planned power cut?

%

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C3 Currently NIE Networks put a card through your door to inform householders about planned power cuts. Is this an acceptable approach?
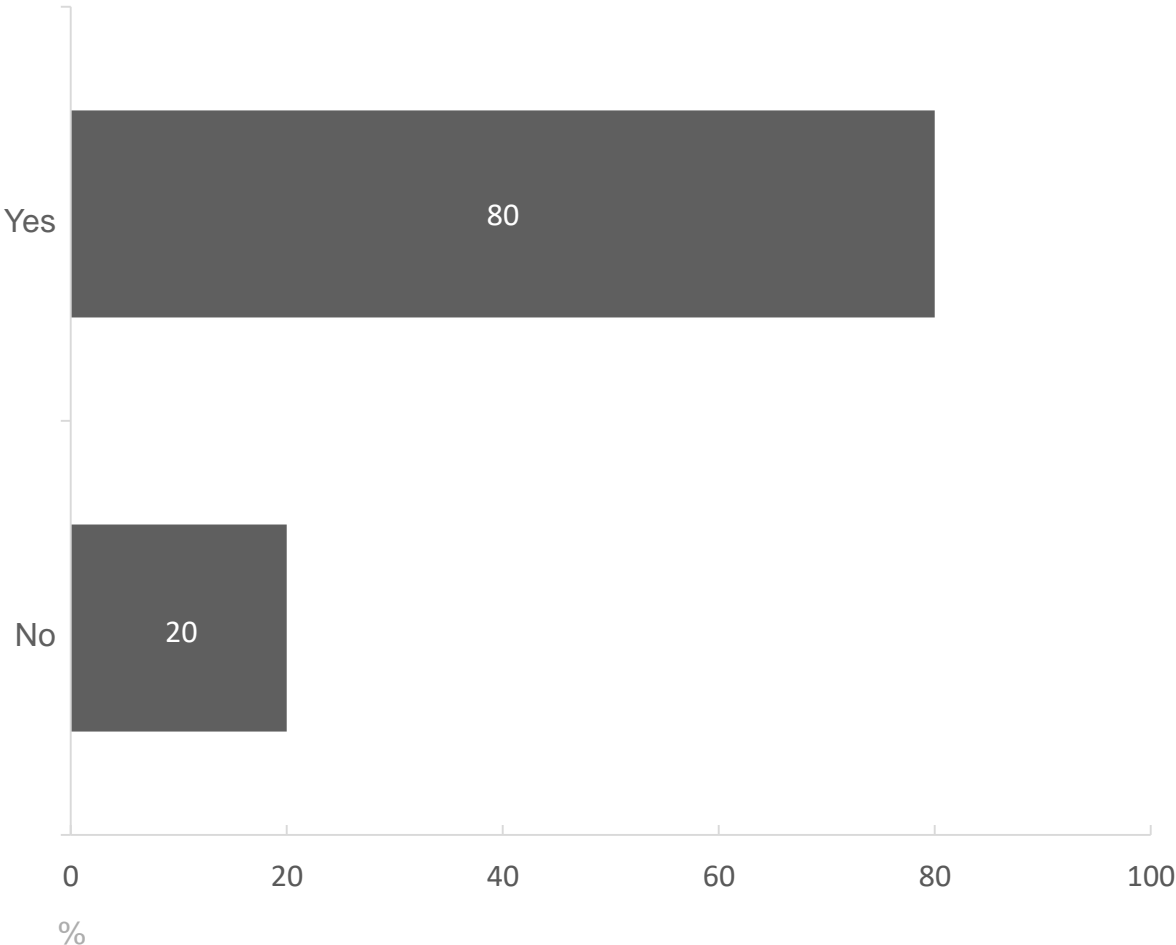
C5 Have you had an unplanned power cut in the last 12 months?

% saying yes

2015 results
Base=1205 (weighted data)

		2015 results
Overall	13	22%
Urban	8	17%
Rural	25	32%

[1] Due to rounding percentages add to 99%-101%

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C6 Thinking about the last 12 months, how many times have you experienced an unplanned power cut?

C8, C9 Reporting of unplanned power cuts

C8 Did you report any of these unplanned power cuts?
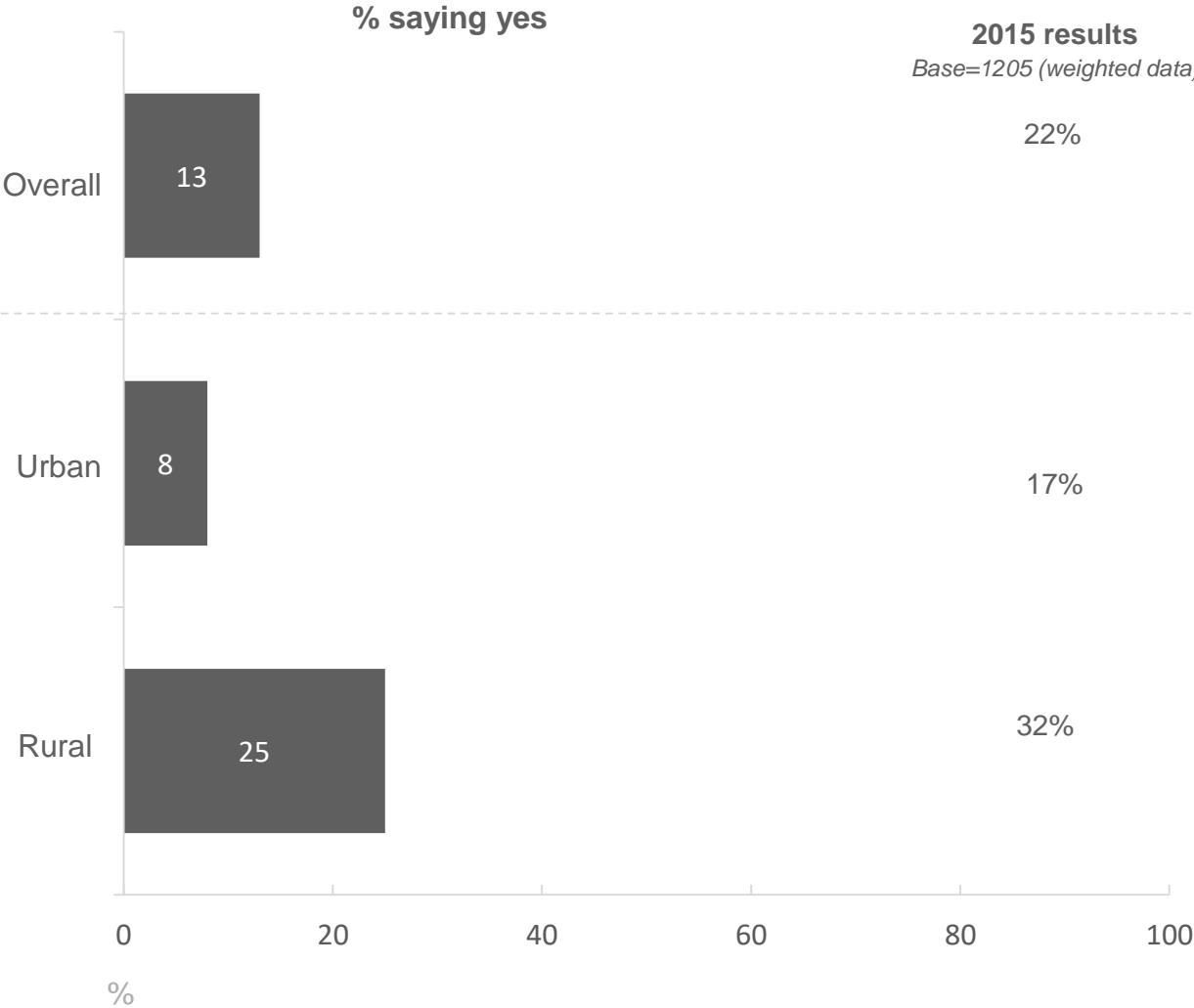
Base 65: Respondents that have experienced an unplanned power cut

Yes
26%

No
74%
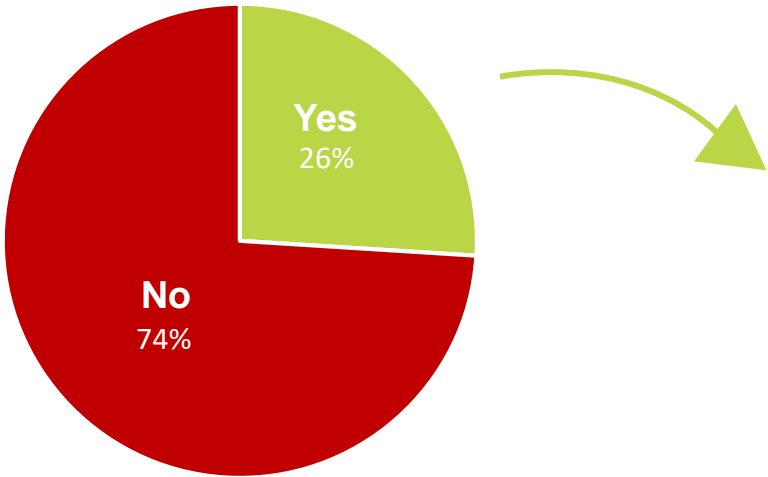
C9 Who did you report the power cut to?
Base 17: Respondents that reported an unplanned power cut

NIE Networks	88
Your supplier	6
Don't know / can't remember	6

0   10   20   30   40   50   60   70   80   90   100
%

[1] Due to rounding percentages add to 99%-101%

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C12 In the last 12 months have you used the Powercheck on NIE Network's website?

% saying yes

		% saying yes
	Overall	7
Gender	Male	6
	Female	9
Age	Under 40	12
	40-59	9
	60+	2
SEG	ABC1	9
	C2DE	5

%

[1] 2011 census

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Business

C1 Have you had a planned power cut in the last 12 months?

% saying yes

2015 results
Base=507 (weighted data)

Overall	20	20%
Urban	15	8%
Rural/Mixed	27	13%

[1] 2011 census
[1] Due to rounding percentages add to 99%-101%

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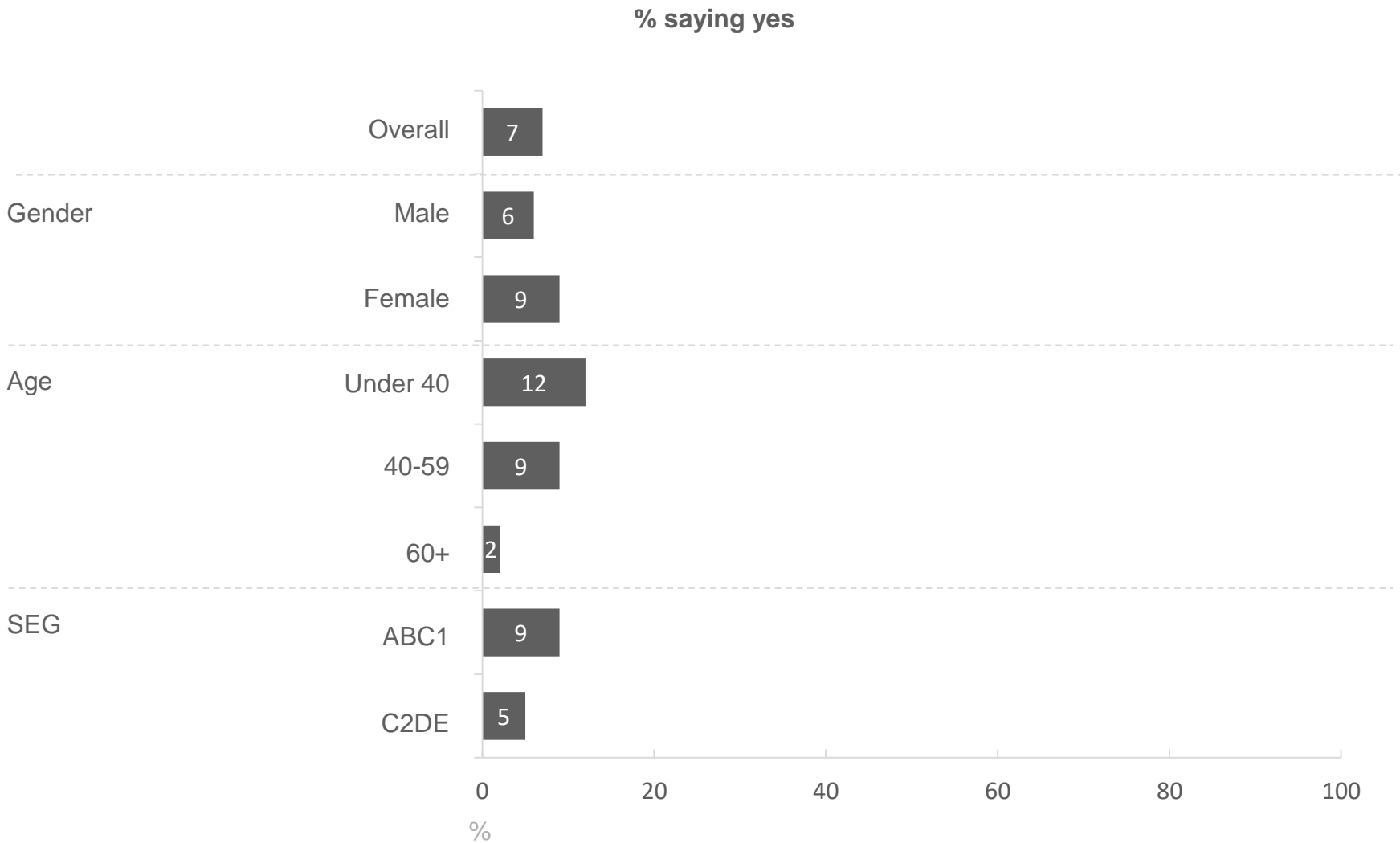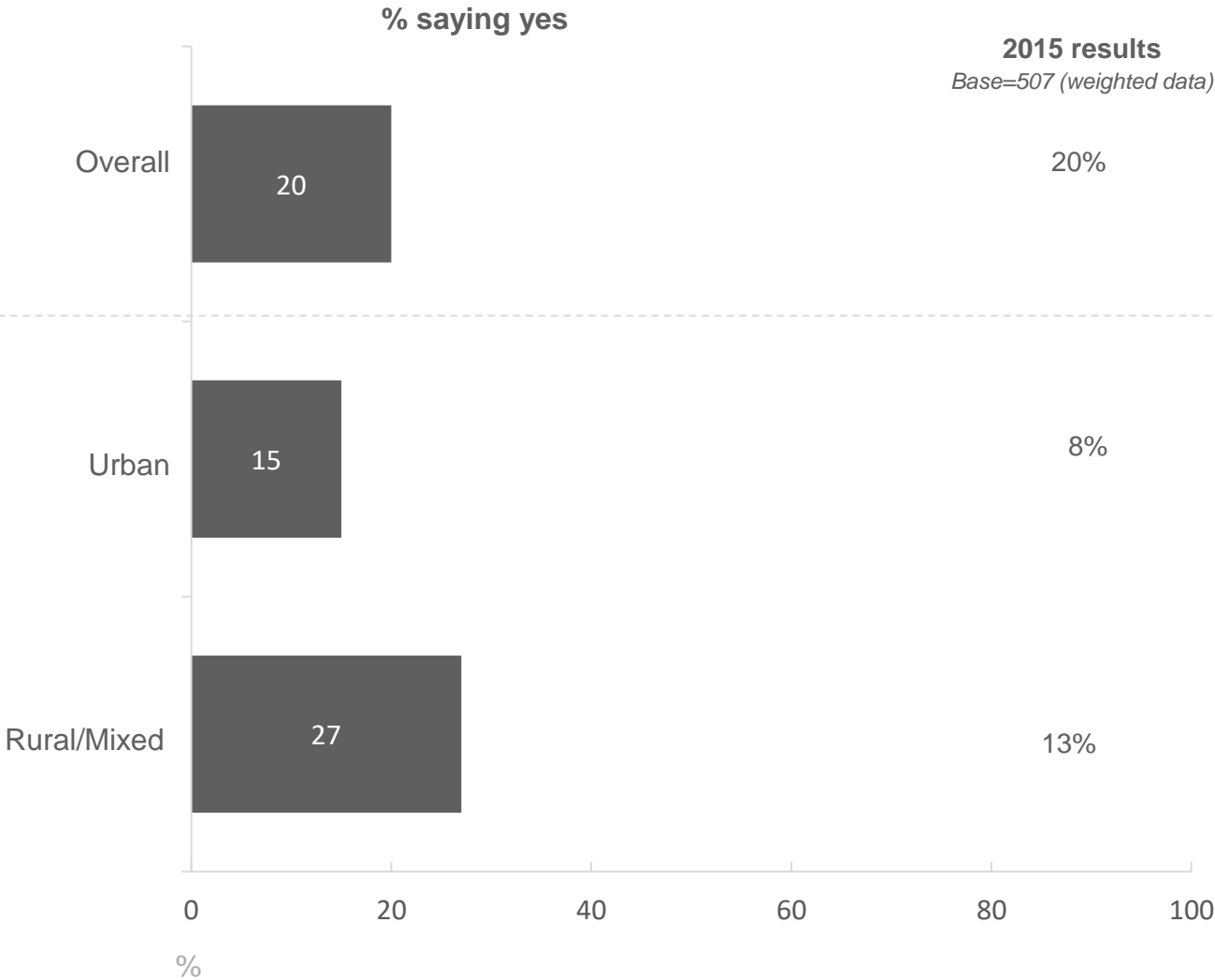
C2 Thinking about the last 12 months, how many times have you experienced a planned power cut?

NB: Low base

2015 results
Base=100 (weighted data)

Once	66	59%
Twice	19	24%
Three times	6	13%
More than three times	2	2%
Not sure	7	2%

[1] Due to rounding percentages add to 99%-101%

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C3 Currently NIE Networks put a card through your door to inform organisations about planned power cuts. Is this an acceptable approach?

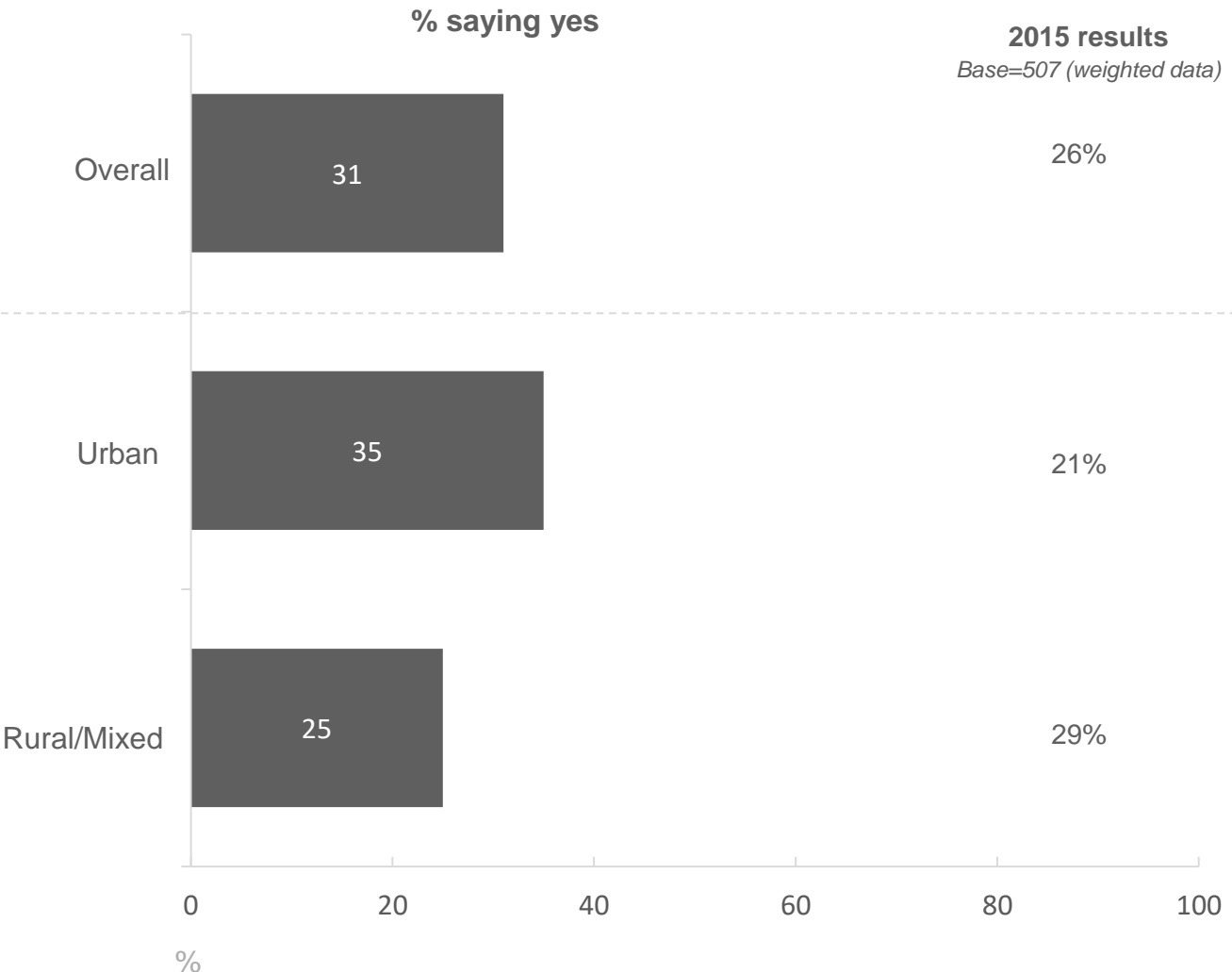**2015 results**
Base=507 (weighted data)

Yes   76   81%

No   24   19%

0   20   40   60   80   100

%
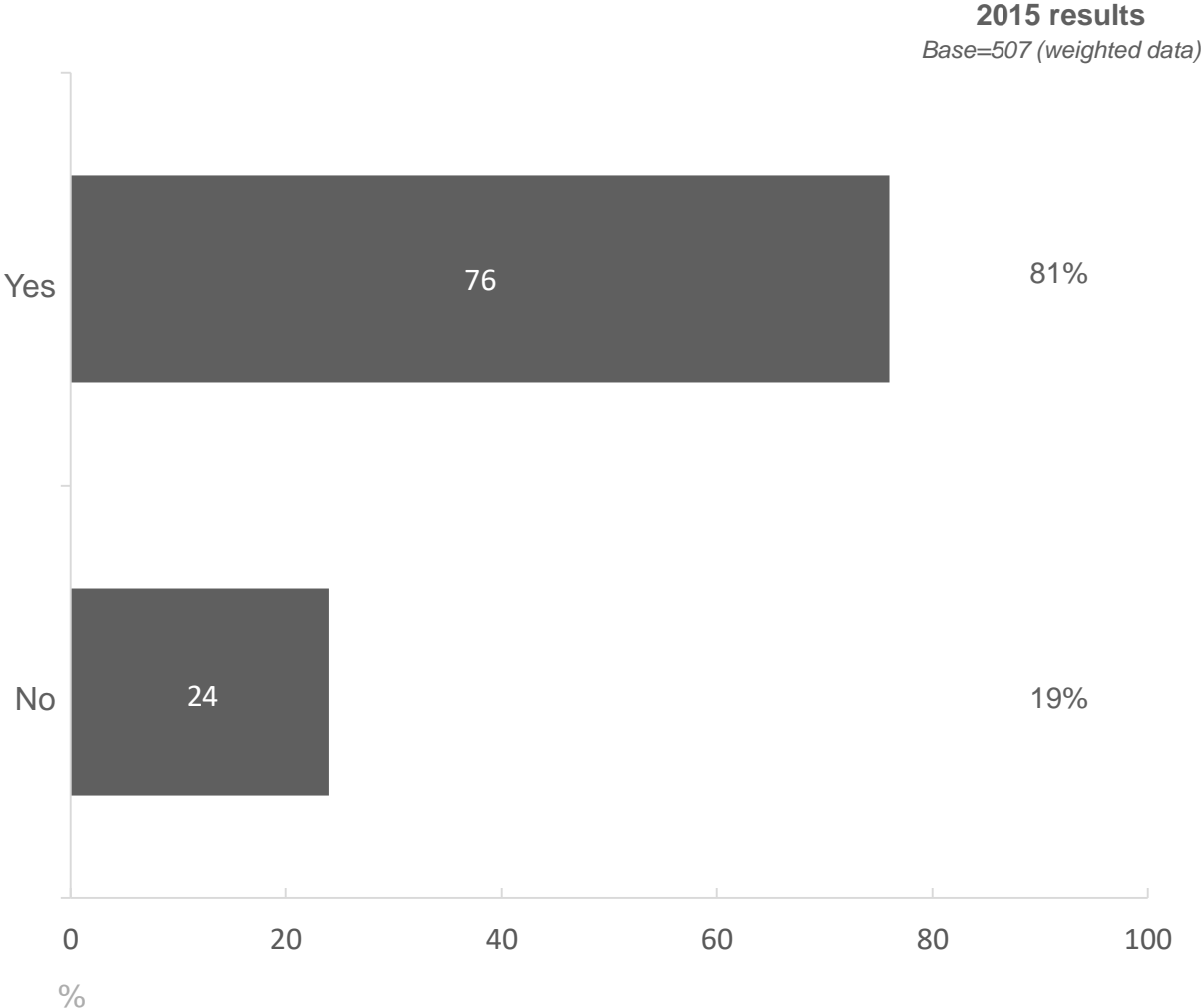
¹ Due to rounding percentages add to 99%-101%

C5 Have you had an unplanned power cut in the last 12 months?

% saying yes

2015 results
Base=507 (weighted data)

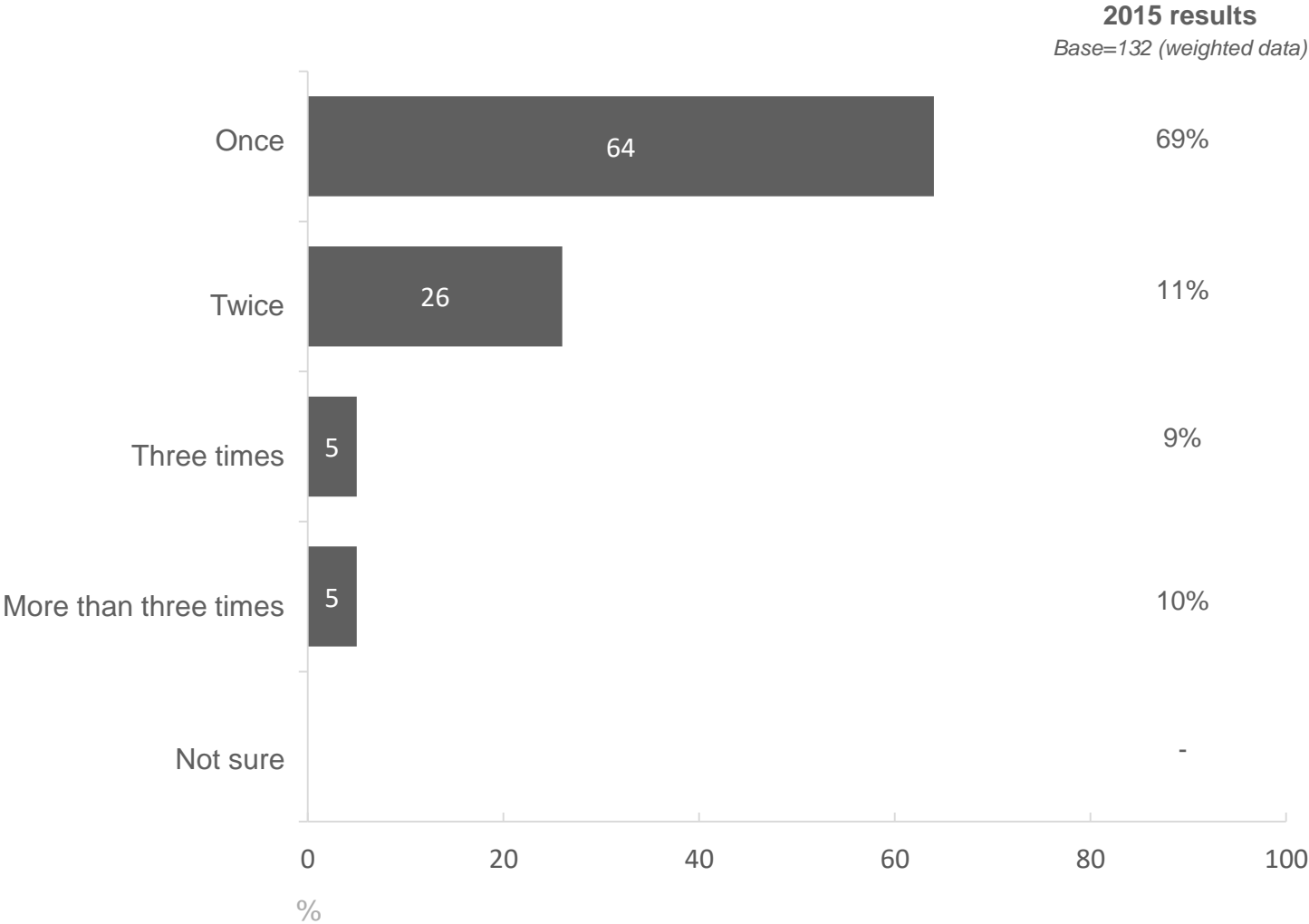| Category	% saying yes	2015 results
Overall	31	26%
Urban	35	21%
Rural/Mixed	25	29%

%

[1] Due to rounding percentages add to 99%-101%

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C6 Thinking about the last 12 months, how many times has your organisation experienced an unplanned power cut?

2015 results
Base=132 (weighted data)

Category	Value	2015 results
Once	64	69%
Twice	26	11%
Three times	5	9%
More than three times	5	10%
Not sure		-

[1] Due to rounding percentages add to 99%-101%

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Reporting of unplanned power cuts

C8 Did you report any of these unplanned power cuts?

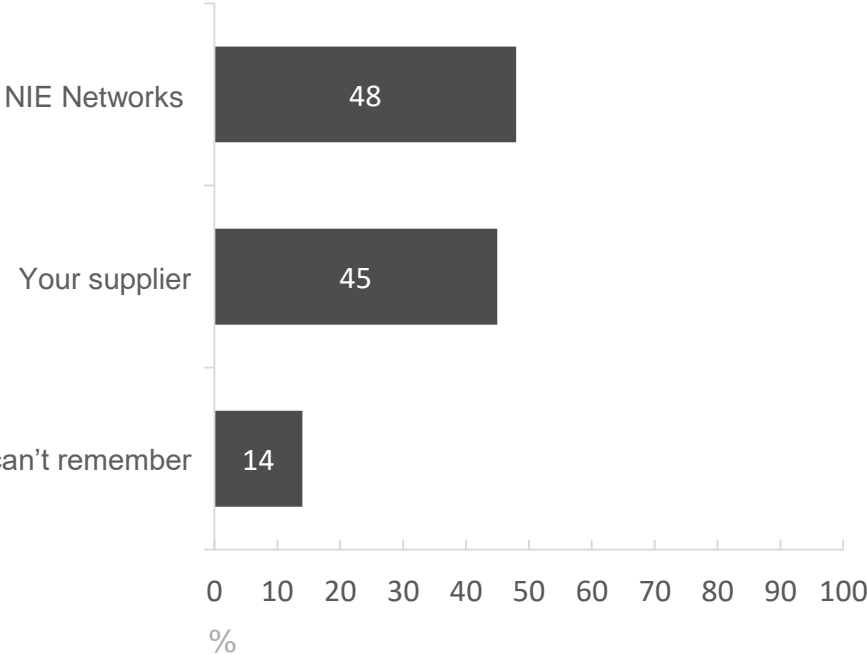Base 64/66: Businesses that have experienced an unplanned power cut

No
41%

Yes
59%
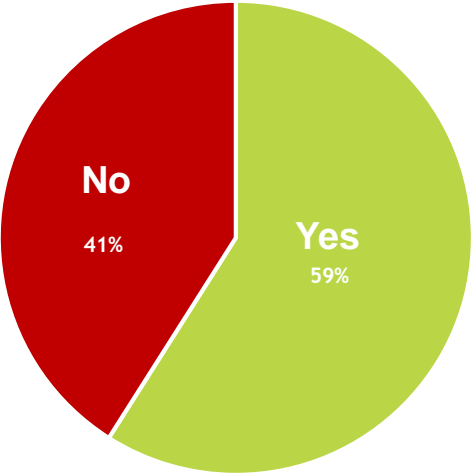
C9 Who did you report the power cut to?

Base 39/39: Businesses that reported an unplanned power cut

NIE Networks	48
Your supplier	45
Don't know / can't remember	14

0 10 20 30 40 50 60 70 80 90 100

%

[1] Due to rounding percentages add to 99%-101%

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C12 In the last 12 months have you used the Power check on NIE Network's website?

% saying yes

Overall — 8

Size

Up to 10 — 8

11 to 49 — 9

50+ — 18

%

[1] Due to rounding percentages add to 99%-101%

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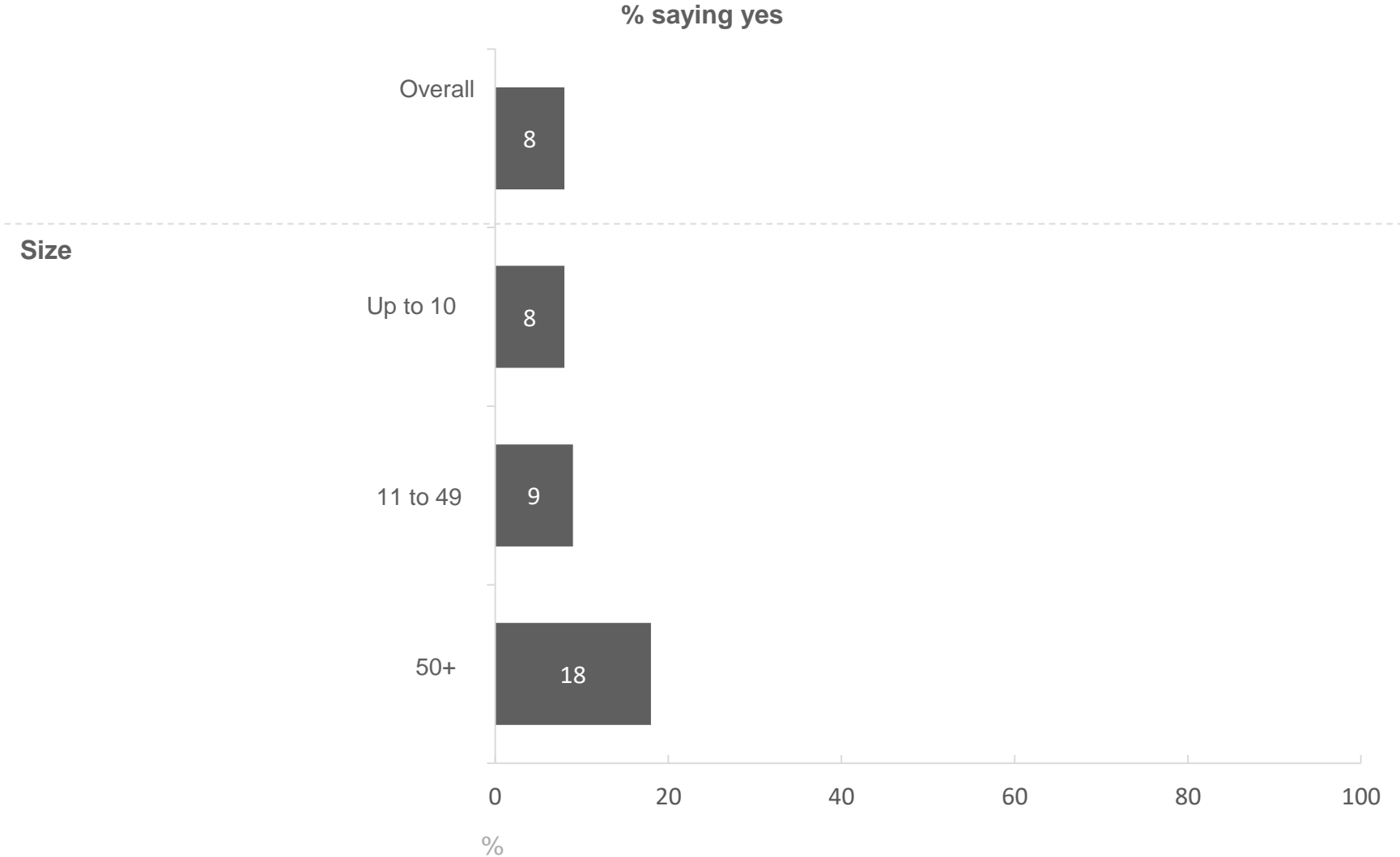
Contact & communication channels

Domestic

D1 What is your most preferred method of interaction for the following circumstances?

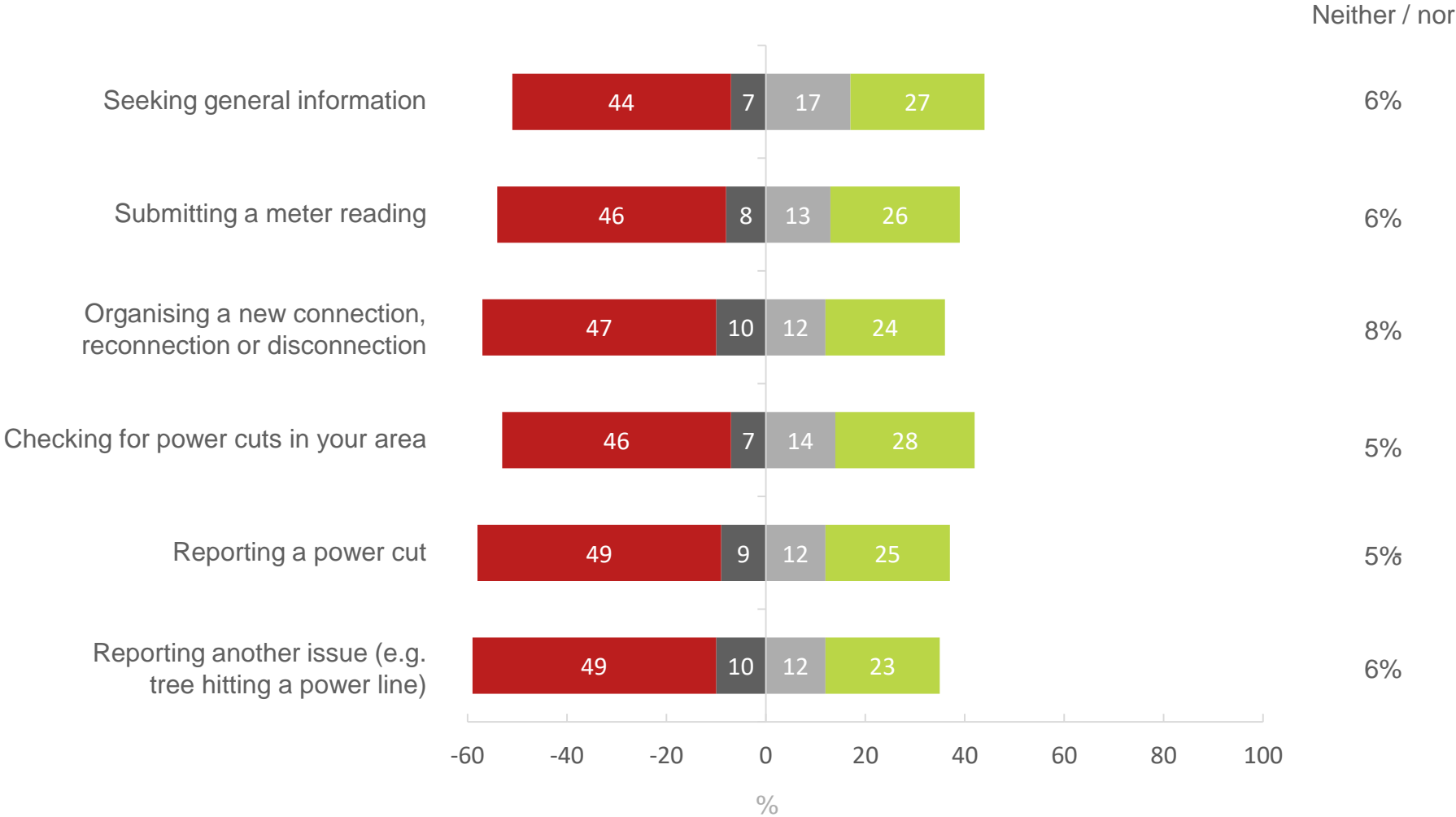|	Phone - personal	Phone - automated message	Email	NIE Networks Website	Text message	Facebook	Twitter	Letter	Power check	Live chat	Other
Seeking general information	47%	1%	7%	29%	4%	2%	-	7%	-	1%	3%
Submitting a meter reading	33%	1%	11%	20%	5%	-	-	4%	-	-	25%
Organising a new connection, reconnection or disconnection	65%	-	7%	16%	1%	-	-	4%	-	1%	6%
Checking for power cuts in your area	44%	3%	4%	32%	2%	4%	-	2%	1%	-	8%
Reporting a power cut	67%	2%	5%	18%	1%	1%	-	1%	-	-	5%
Reporting another issue (e.g. tree hitting a power line)	75%	1%	5%	11%	1%	-	-	1%	-	-	5%

[1] Due to rounding percentages add to 99%-101%

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D2 How likely, or not, would you be to interact with NIE Networks using online methods for the following circumstances?

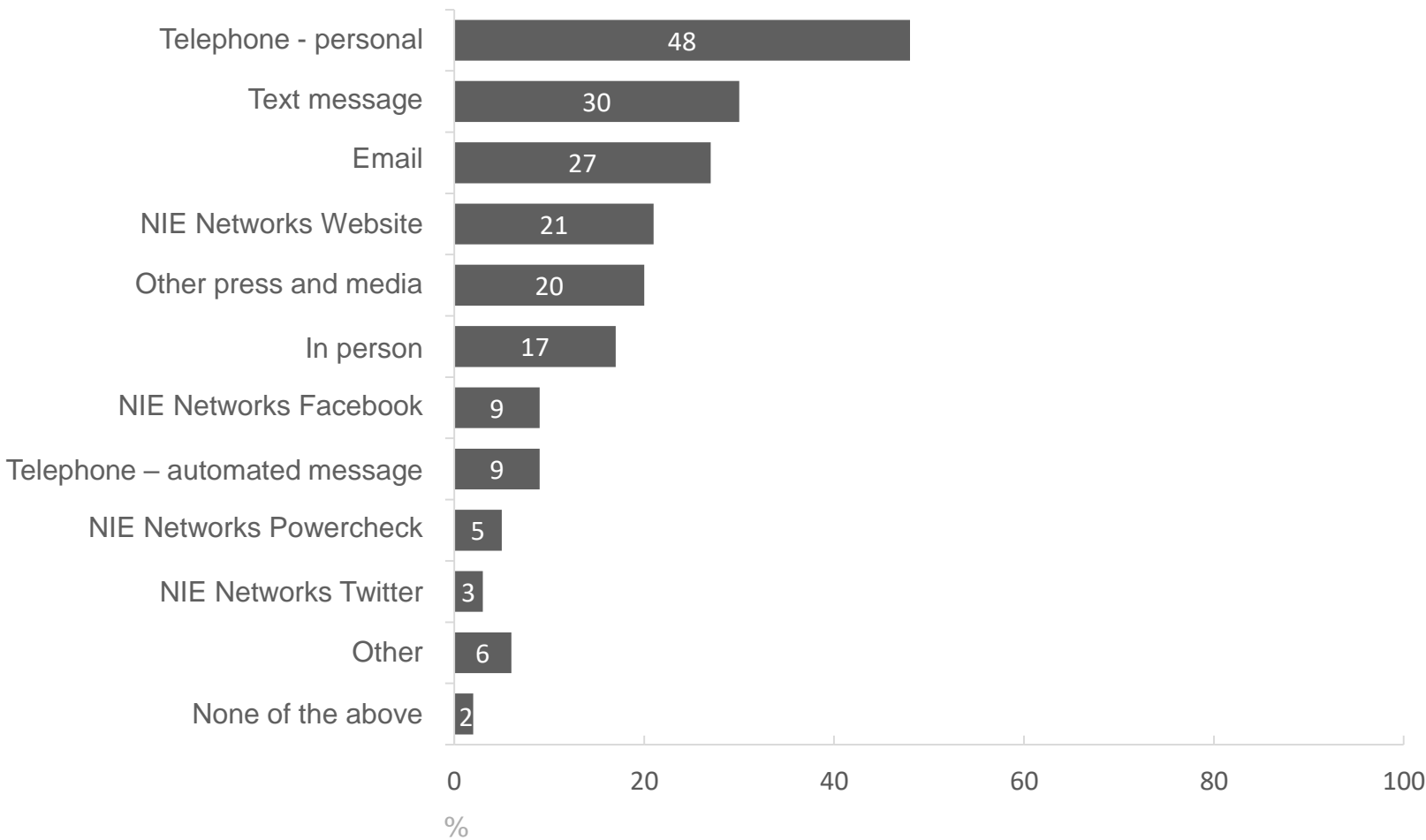Base 510: All respondents

Very unlikely   Fairly unlikely   Fairly likely   Very likely

Neither / nor

Circumstance	Very unlikely	Fairly unlikely	Fairly likely	Very likely	Neither / nor
Seeking general information	44	7	17	27	6%
Submitting a meter reading	46	8	13	26	6%
Organising a new connection, reconnection or disconnection	47	10	12	24	8%
Checking for power cuts in your area	46	7	14	28	5%
Reporting a power cut	49	9	12	25	5%
Reporting another issue (e.g. tree hitting a power line)	49	10	12	23	6%

%

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D3 Following initial contact with NIE Networks to report an issue, which of the following methods of communication are acceptable for NIE Networks to keep you up to date?

Method	%
Telephone - personal	48
Text message	30
Email	27
NIE Networks Website	21
Other press and media	20
In person	17
NIE Networks Facebook	9
Telephone – automated message	9
NIE Networks Powercheck	5
NIE Networks Twitter	3
Other	6
None of the above	2

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Business

D1 What is your most preferred method of interaction for the following circumstances?

	Phone - personal	Phone - automated message	Email	NIE Networks Website	Text message	Facebook	Twitter	Letter	Power check	Live chat	Other	Total
Seeking general information	32%	2%	8%	55%	1%	-	-	-	-	1%	-	100%
Submitting a meter reading	36%	4%	19%	32%	1%	-	-	1%	1%	-	5%	100%
Organising a new connection, reconnection or disconnection	63%	3%	10%	19%	1%	-	-	-	-	2%	1%	100%
Checking for power cuts in your area	41%	2%	3%	48%	1%	-	-	3%	1%	-	-	100%
Reporting a power cut	76%	1%	6%	15%	1%	-	-	-	-	1%	-	100%
Reporting another issue (e.g. tree hitting a power line)	72%	-	9%	18%	1%	-	-	-	-	-	-	100%

[1] Due to rounding percentages add to 99%-101%

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D2 How likely, or not, would you be to interact with NIE Networks using online methods for the following circumstances?

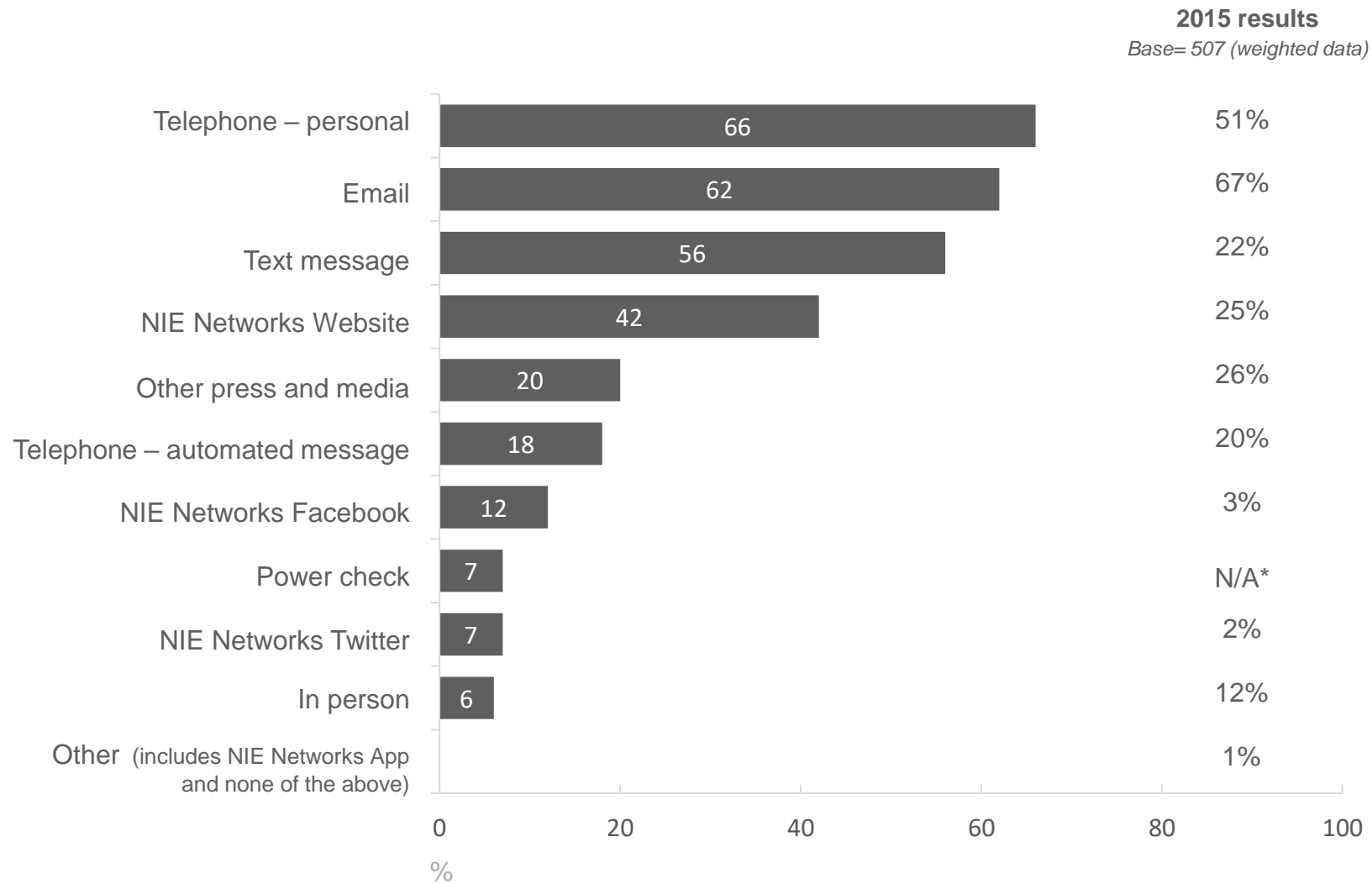Legend: ■ Very unlikely (red) ■ Fairly unlikely (dark grey) ■ Fairly likely (light grey) ■ Very likely (green)

Neither / nor

Circumstance	Very unlikely	Fairly unlikely	Fairly likely	Very likely	Neither / nor
Seeking general information	2	3	53	34	9%
Submitting a meter reading	2	6	48	35	9%
Organising a new connection, reconnection or disconnection	10	14	47	20	9%
Checking for power cuts in your area	6	7	59	21	8%
Reporting a power cut	11	18	43	15	12%
Reporting another issue (e.g. tree hitting a power line)	12	20	42	15	10%

%

¹ Due to rounding percentages add to 99%-101%

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D3 Following initial contact with NIE Networks to report an issue, which of the following methods of communication are acceptable for NIE Networks to keep you up to date?

2015 results
Base= 507 (weighted data)

Method	%	2015 results
Telephone – personal	66	51%
Email	62	67%
Text message	56	22%
NIE Networks Website	42	25%
Other press and media	20	26%
Telephone – automated message	18	20%
NIE Networks Facebook	12	3%
Power check	7	N/A*
NIE Networks Twitter	7	2%
In person	6	12%
Other (includes NIE Networks App and none of the above)		1%

%
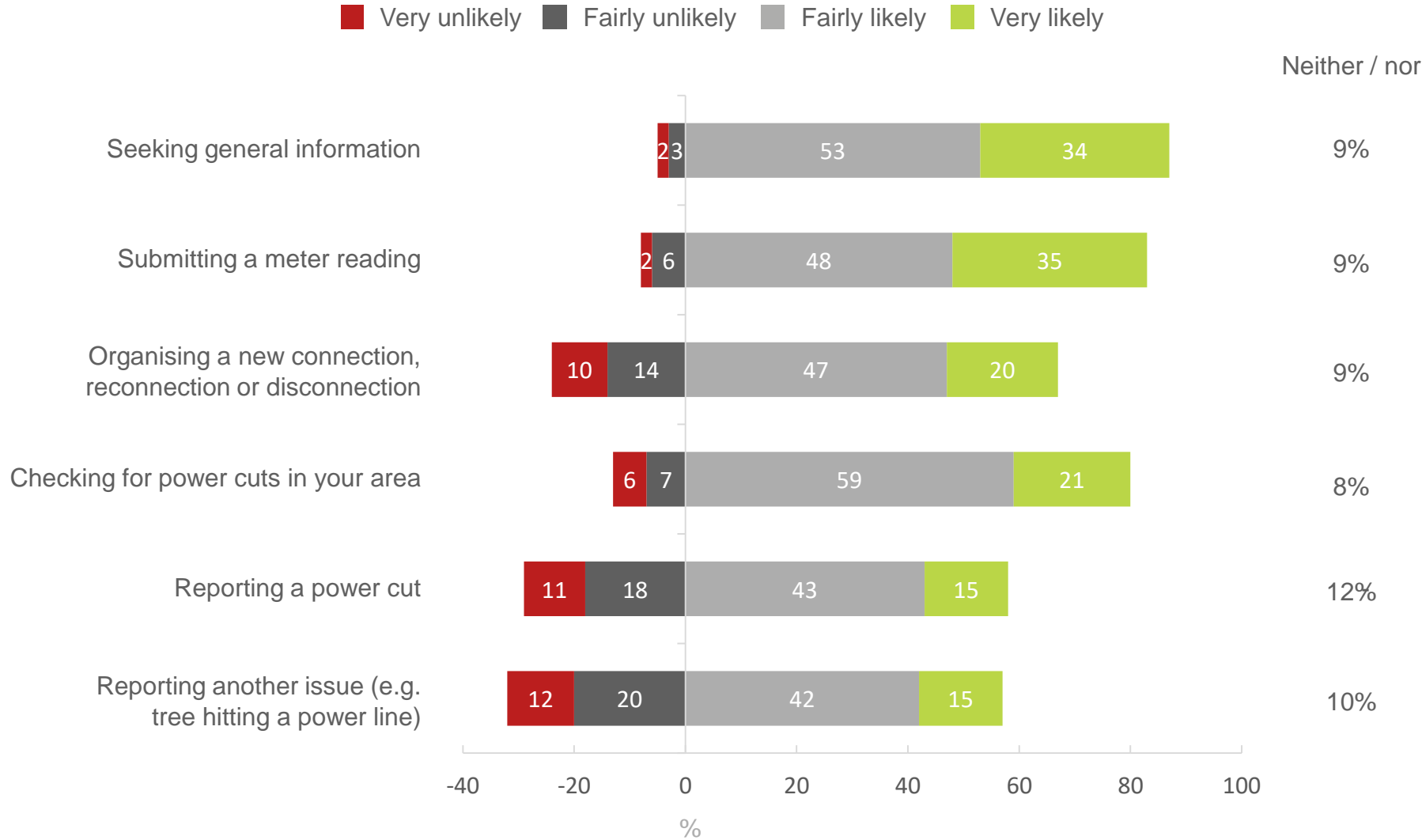
[1] Multiple response question, therefore percentages add to >100%
*Not asked in 2015

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69

Future networks

🏠 Domestic

E1 To what extent do you agree or disagree with the following statements?

Legend: Strongly disagree ■ Disagree ■ Agree ■ Strongly agree

Neither agree / disagree

I think it is important to invest in new technology to reduce the impact on the environment — Agree 27, Strongly agree 65 — Neither agree / disagree 7%

I am willing to change my behaviours because of concerns about climate change — Strongly disagree 2, Disagree 5, Agree 25, Strongly agree 52 — Neither agree / disagree 17%

I am willing to pay extra to reduce impact on the environment — Strongly disagree 9, Disagree 15, Agree 24, Strongly agree 28 — Neither agree / disagree 24%

%

perceptive**insight**

E2 In the last three years have you or your household done any of the following to reduce your electricity use or bill?
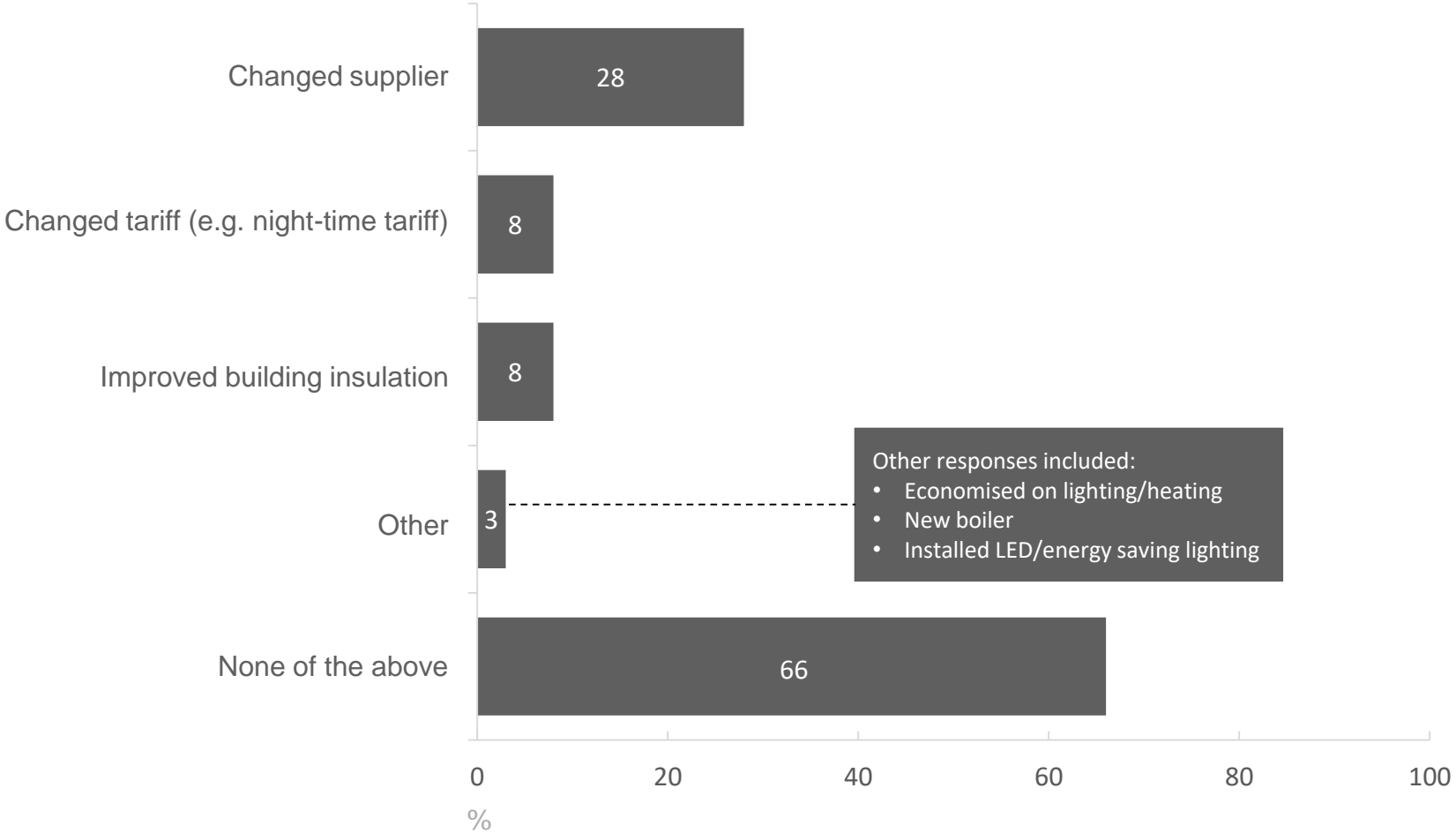
Other responses included:
- Economised on lighting/heating
- New boiler
- Installed LED/energy saving lighting

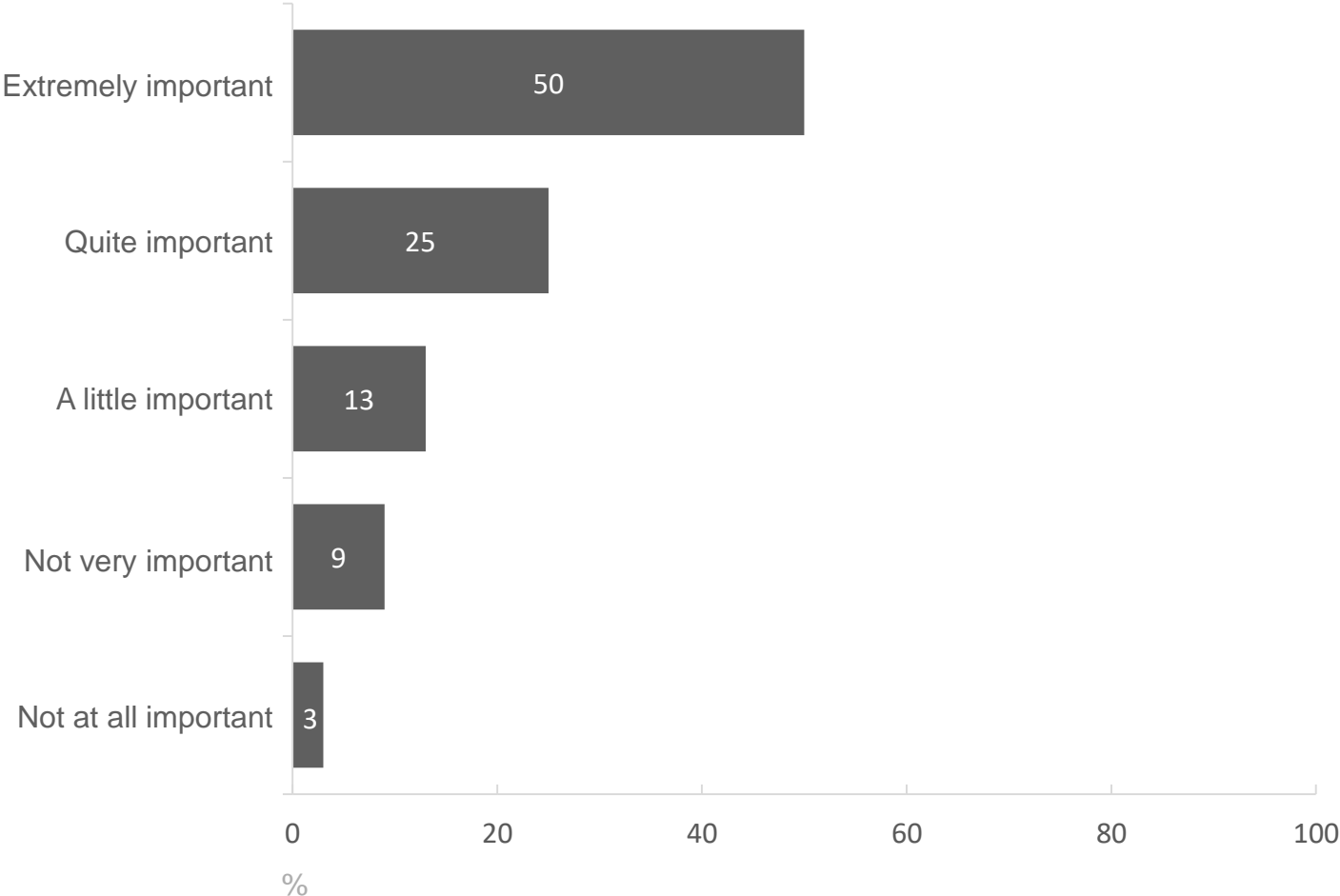[1] Multiple response question, therefore percentages add to >100%

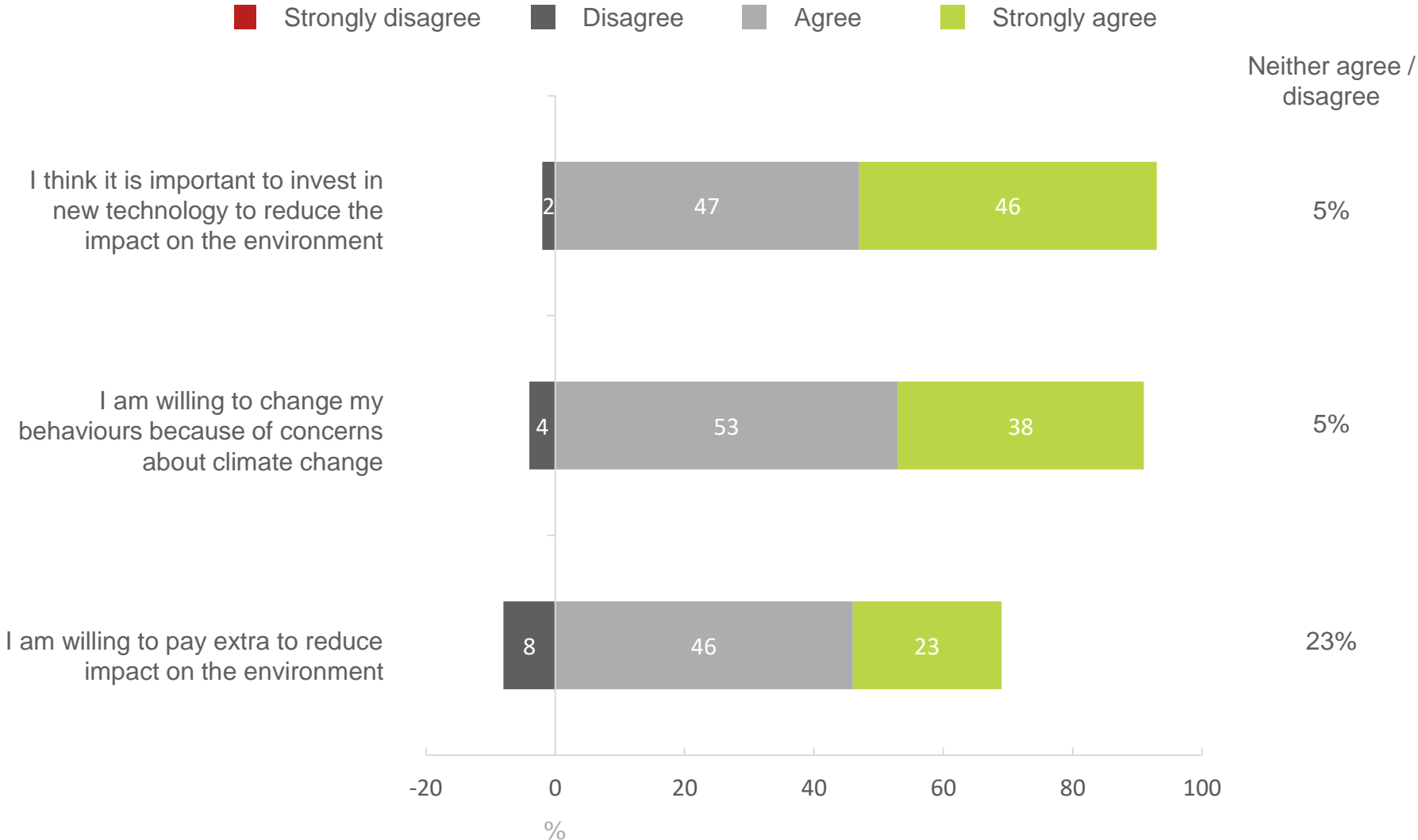# E4 How important, if at all, is the issue of climate change to you personally?

Business

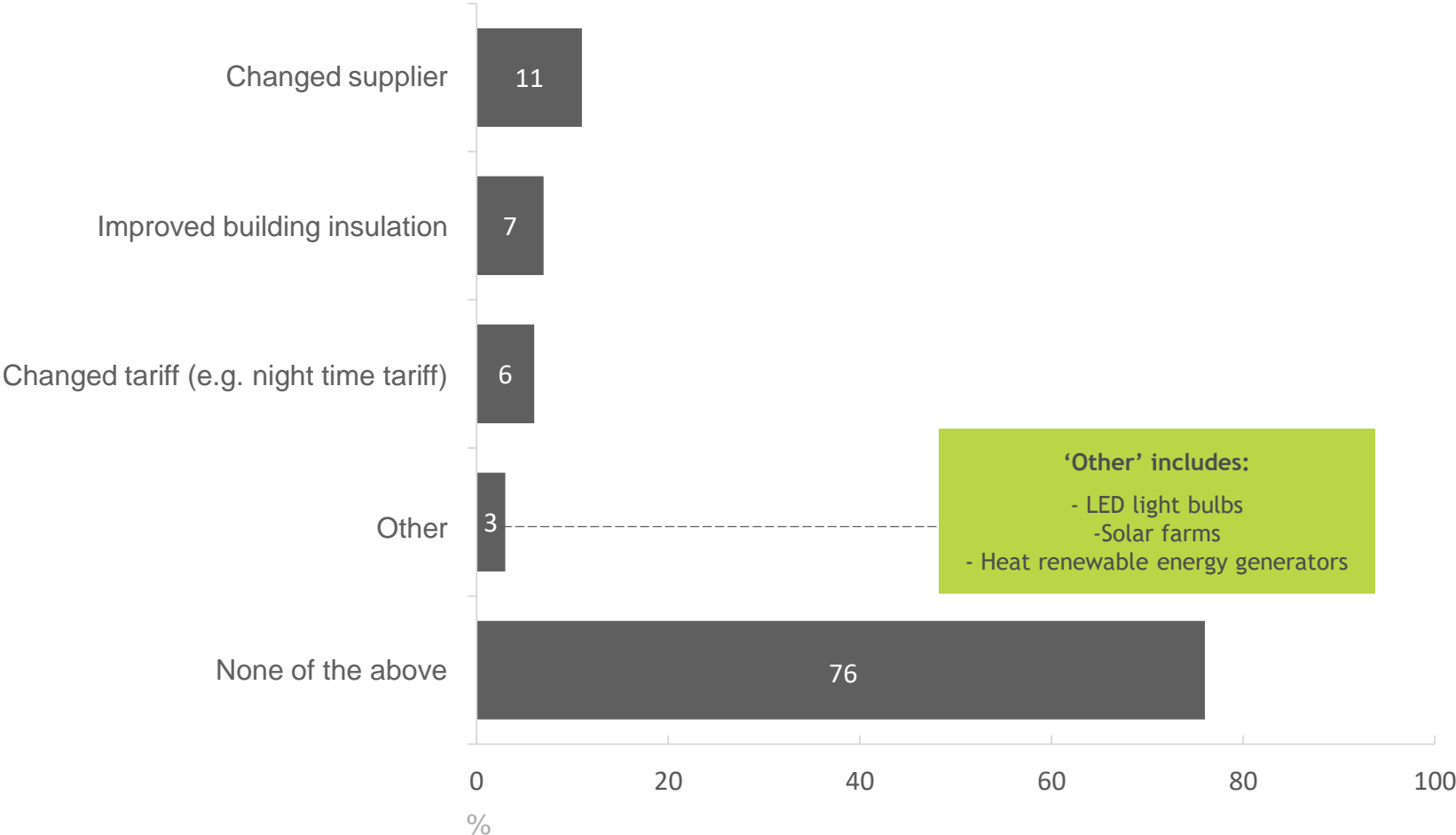# E1 To what extent do you agree or disagree with the following statements?

Legend: Strongly disagree | Disagree | Agree | Strongly agree

Neither agree / disagree

Statement	Disagree	Agree	Strongly agree	Neither agree / disagree
I think it is important to invest in new technology to reduce the impact on the environment	2	47	46	5%
I am willing to change my behaviours because of concerns about climate change	4	53	38	5%
I am willing to pay extra to reduce impact on the environment	8	46	23	23%

x-axis: -20, 0, 20, 40, 60, 80, 100 %

E2 In the last three years has your organisation done any of the following to reduce your electricity use or bill?

'Other' includes:
- LED light bulbs
- Solar farms
- Heat renewable energy generators

Category	%
Changed supplier	11
Improved building insulation	7
Changed tariff (e.g. night time tariff)	6
Other	3
None of the above	76

%

[1] Multiple response question, therefore percentages add to >100%

E4 How important, if at all, is the issue of climate change to your organisation?

1 Due to rounding percentages add to 99%-101%

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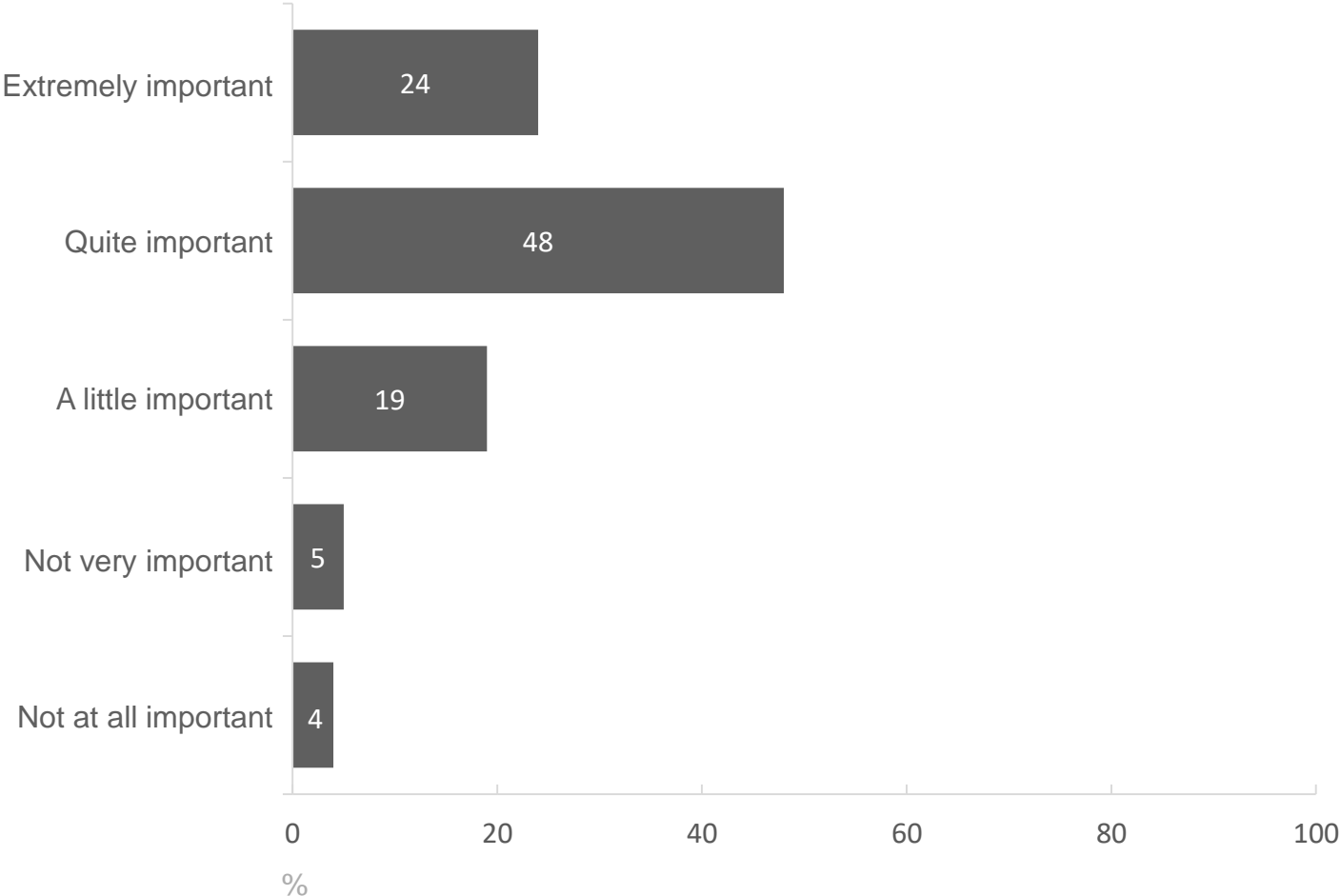
Summary of findings

Domestic

Business