



Northern Ireland Non-Domestic Energy Consumer Insight Tracker Survey

Report prepared for the Utility Regulator

11th November 2020



Contents

Table of figures	3
Executive summary	5
Introduction	13
Methodology.....	15
Billing and affordability	20
Understanding of the energy market	28
Switching.....	45
Communication and methods of contact	57
Complaint handling.....	63
Satisfaction with services provided	69
Energy efficiency, renewables and decarbonisation	76
Impact of the Covid-19 pandemic on energy usage	81
Conclusions and areas for consideration	82
Appendix A – Detailed methodology	86
Appendix B – Questionnaire.....	90

This report is protected under the copyright laws of the United Kingdom. It contains information that is proprietary and confidential to Perceptive Insight Market Research Ltd, and shall not be disclosed outside the recipient's company or duplicated, used or disclosed in whole or in part by the recipient for any purpose other than to evaluate this proposal. Any other use or disclosure in whole or in part of this information without the express written permission of Perceptive Insight Market Research Ltd is prohibited.
© 2020 Perceptive Insight

Table of figures

Introduction

Figure 1: Overview of the Utility Regulator’s Corporate Strategy 2019-2024.....	13
---	----

Methodology

Figure 1.1 Energy type usage.....	16
Figure 1.2 Natural gas usage by business size and sector.....	17
Figure 1.3 Natural gas usage by location.....	17
Figure 1.4 Electricity supplier.....	18
Figure 1.5 Natural gas supplier.....	19

Billing and affordability

Figure 2.1 Business spending on electricity/ natural gas.....	21
Figure 2.2. Spending on electricity as a proportion of total outgoings by size and sector.....	22
Figure 2.3 Spending on natural gas as a proportion of total outgoings by size.....	22
Figure 2.4 Cost of energy in Northern Ireland compared to ROI by size and sector.....	23
Figure 2.4 Cost of energy in Northern Ireland compared to GB by size and sector.....	24
Figure 2.5 Contract type for electricity by size and sector.....	25
Figure 2.6 Tariff type for electricity by size and sector.....	26
Figure 2.7 Contract type for natural gas by size.....	26
Figure 2.8 Tariff type for natural gas by size.....	27

Understanding the energy market

Figure 3.1 Awareness of minimum standards of customer service by size and sector.....	29
Figure 3.2 Provision of key contact person/ account manager (electricity supplier) by size and sector.....	30
Figure 3.3 Provision of key contact person/account manager (electricity supplier) by switching behaviour.....	31
Figure 3.4 Provision of key contact person/ account manager (natural gas supplier) by size.....	32
Figure 3.5 Provision of key contact person/account manager (natural gas supplier) by switching behaviour.....	32
Figure 3.6 Knowledge of electricity supplier by size and sector.....	33
Figure 3.7 Knowledge of electricity supplier by switching behaviour.....	34
Figure 3.8 Knowledge of gas supplier by size.....	35
Figure 3.9 Knowledge of gas supplier by switching behaviour.....	36
Figure 3.10 Awareness of choice between multiple energy suppliers by size and sector.....	37
Figure 3.11 Awareness of choice between multiple energy suppliers by switching behaviour.....	37
Figure 3.12 Awareness of choice between tariff types by size and sector.....	38
Figure 3.13 Awareness of choice between tariff types by switching behaviour.....	39
Figure 3.14 Impact on service of increased competition in energy market by size and sector.....	40
Figure 3.15 Impact on service of increased competition in energy market by switching behaviour.....	40
Figure 3.16 Impact on responsiveness of suppliers of increased competition in energy market by size and sector.....	41
Figure 3.17 Impact on availability of suppliers to suit business needs of increased competition in energy market by size and sector.....	41
Figure 3.18 Impact on cost of energy of increased competition in energy market by size and sector.....	42
Figure 3.19 Impact on cost of energy of increased competition in energy market by switching behaviour.....	43
Figure 3.20 D4c Impact on tariff options of increased competition in energy market by size and sector.....	43
Figure 3.21 Impact on tariff options of increased competition in energy market by switching behaviour.....	44

Switching

Figure 4.1 Ease of comparing deals for electricity/ natural gas by size and sector.....	46
---	----

Figure 4.2 Ease of comparing deals for electricity by switching behaviour	47
Figure 4.3 Ease of comparing deals for gas by switching behaviour	47
Figure 4.4 Awareness of CCNI price comparison tool by size and sector	48
Figure 4.5 Incidence of switching electricity supplier by size and sector	49
Figure 4.6 Incidence of switching gas supplier by size	50
Figure 4.7 Reasons for not switching electricity/ gas supplier	51
Figure 4.8 Reasons for switching electricity/ gas suppliers	52
Figure 4.9 Mode of switching electricity/ gas supplier	53
Figure 4.10 Experience of switching electricity supplier	54
Figure 4.11 Experience of switching gas supplier	54
Figure 4.12 Likelihood of switching in the next 12 months	55
Figure 4.13 Likelihood of switching electricity supplier in the next 12 months by switching behaviour	56
Figure 4.14 Likelihood of switching gas supplier in the next 12 months by switching behaviour	56

Communication and methods of contact

Figure 5.1 Method of billing (electricity) by size and sector	58
Figure 5.1 Method of billing (natural gas) by size	58
Figure 5.2 Mode of receiving correspondence from energy suppliers by size and sector	59
Figure 5.3 Sources of information and advice on energy matters	60
Figure 5.4 Experience of interacting with electricity supplier by size and sector	61
Figure 5.5 Experience of interacting with electricity supplier by switching behaviour	61
Figure 5.6 Experience of interacting with gas supplier by size	62
Figure 5.7 Experience of interacting with gas supplier by switching behaviour	62

Complaint handling

Figure 6.1 Complaints to electricity/ natural gas supplier by size and sector	64
Figure 6.2 Responsiveness to complaints to electricity supplier	65
Figure 6.3 Satisfaction with outcome of complaint to electricity supplier	66
Figure 6.4 Incidence of unreported complaint	67
Figure 6.5 Knowledge of how to make a complaint to energy supplier by size and sector	68

Satisfaction with services provided

Figure 7.1 Satisfaction with overall service from electricity supplier by size and sector	70
Figure 7.2 Satisfaction with overall service from gas supplier by size	71
Figure 7.3 Trust in electricity supplier to give clear information and fair price by size and sector	72
Figure 7.4 Trust in gas supplier to give clear information and fair price by size	73
Figure 7.5 Likelihood to recommend electricity supplier by size and sector	74
Figure 7.6 Likelihood to recommend natural gas supplier by size	75

Energy efficiency, renewables and decarbonisation

Figure 8.1 Energy efficiency measures undertaken by size and sector	77
Figure 8.2 Reasons for not undertaking energy efficiency measures	78
Figure 8.3 Importance of climate change to business by size and sector	79
Figure 8.4 Awareness of radical changes in energy sector by size and sector	80

Special topics

Figure 9.1 Impact of Covid-19 on energy usage by size and sector	81
--	----

Executive summary

The following paragraphs summarise the background and approach taken to the Utility Regulator's Non-Domestic Consumer Insight Tracker 2020. This is followed by a brief outline of the key findings under the main themes of the survey.

Background

The Utility Regulator in Northern Ireland commissioned Perceptive Insight Market Research to carry out a statistically robust and repeatable survey with non-domestic energy consumers in Northern Ireland to provide baseline data for planning and activity under the Utility Regulator's Corporate Strategy 2019 – 2024 in line with best practice.

The aims of the research were as follows:

- To measure consumer engagement, experience and attitudes in the non-domestic markets in Northern Ireland;
- To highlight the issues that impact this consumer group and how these may have changed over time; and
- To assess the extent to which non-domestic energy consumers have an understanding of the requirements in relation to the energy transition to a decarbonised whole energy system.

Methodology

A telephone interviewing methodology was used to conduct the survey. Interviewing took place during August and September 2020 with each interview taking, on average, 10 to 15 minutes to complete. Interviewing was carried out in compliance with the GDPR 2018 and the Market Research Society Code of Conduct. In total, 500 interviews were completed.

Key findings

Billing and affordability

- Spending on energy is not a major outgoing for most businesses, with 47% for electricity and 51% for natural gas saying costs represented 4% or less of total outgoings. However, energy price changes could have a considerable impact on some businesses in specific sectors.
- For many non-domestic consumers, energy spending is not a top-of-mind issue. This is evidenced by the considerable numbers unable to estimate their energy spending for the survey (18% for electricity; 17% for gas) or to compare Northern Ireland energy prices with those of the Republic of Ireland (67%) and Great Britain (62%).
- As with domestic consumers, businesses and organisations are more likely to negatively compare NI energy costs to those of GB than ROI. 12% thought energy in NI was more expensive than in ROI, compared to 21% for GB.

- The majority of both electricity and natural gas consumers stated that they are on their supplier's standard variable tariff rather than a promotional tariff (58% and 53% respectively). As might be expected, smaller businesses were less likely to be on a promotional tariff. This pattern was repeated for the professional services sector.

Understanding of the energy market

- A considerable minority (37%) of non-domestic consumers were unaware of the minimum standards for energy suppliers. However, businesses and organisations showed greater awareness than domestic households. The public administration and community/voluntary sectors showed significantly greater awareness than other business types.
- A fifth (21%) of electricity consumers and a quarter (25%) of natural gas consumers reported that they had been assigned a key contact person. As expected, smaller organisations were much less likely to have been assigned one.
- Knowledge of energy supplier was low amongst the respondent group. Almost two thirds (65%) of electricity consumers reporting having 'little' or 'very little' knowledge of their supplier with 53% of natural gas consumers answering similarly.
- Despite low supplier knowledge, very few non-domestic consumers reported a total lack of awareness of the availability of choice in supplier and tariff type (12% and 17% were 'not at all aware' respectively). Lower levels of awareness were marked for the hospitality, and retail/distribution sectors.
- Despite the intended benefits of competition in the NI energy market, the majority of respondents observed 'no change' in respect of service provided, responsiveness of suppliers and availability of suppliers which suit individual needs (just under 60% in each case). Responses were more positive in relation to the cost of energy and tariff options. Around 30% said there had been an improvement to each aspect. Those in the hospitality sector were the most likely of any sector to observe a negative impact for all characteristics.
- There is a marked difference in several instances between the responses given by those who have recently switched supplier and those who have not done so. Switchers were significantly more likely to report good or some knowledge of their supplier than non-switchers (46% compared to 28% for electricity supplier, and 49% compared to 14% for gas). Those who had switched gas and/or electricity supplier were also significantly more likely to perceive an improvement in service and tariff options with the introduction of increased competition in the energy market than non-switchers. However, they were also significantly more likely to say that the cost of energy had been made worse by competition (19% compared to 12%).

Switching

- There were mixed views on the ease with which non-domestic consumers can compare energy deals, with around 30% of both electricity and gas consumers rating it as 'easy'. However, those who had switched supplier recently, were significantly more likely to describe switching as easy than those who had never done so (36% compared to 25% for electricity; and 44% compared to 26% for gas).

- The low overall numbers rating switching as 'easy' may correspond with the low level of awareness of the Consumer Council's energy price comparison tool (just one quarter (25%) of respondents knew about it and 9% had used it).
- Respondents were unlikely to have switched either electricity or gas supplier in the last five years; 62% and 67% had not done so respectively. Non-domestic electricity consumers were much less likely to have switched than their domestic counterparts, however switching rates were similar for natural gas customers.
- The majority of electricity and natural gas consumers are choosing not to switch as they are happy with their current service (68% and 71% respectively) rather than for any other reason. It should be noted that some natural gas consumers do not have a choice of supplier due to the immaturity of the natural gas network outside the Greater Belfast and Larne areas.
- There are two main drivers for switching energy supplier; (i) reacting to a promotional offer by a supplier (45% and 53% of electricity and natural gas switchers respectively) and (ii) reacting to the feeling that the business is paying too much (40% of both groups). This mirrors the findings of the domestic consumer insight tracker.
- There was no one dominant mode of switching for non-domestic consumers; 36% of electricity switchers and 37% of gas switchers had used a broker, 29% and 26% respectively by telephone and 21% and 24% respectively via the internet. However, the experience of switching in respect of price/value for money, ease of switching and quality of service, was overwhelmingly positive for all switchers. The survey results suggest that non-domestic consumers have a better overall switching experience than household switchers.
- Few electricity or natural gas consumers intended to switch over the next 12 months (16% and 17% respectively), however those who have switched recently are significantly more likely to do so again in the next 12 months than those who have never switched.

Communication and methods of contact

- Two fifths (41%) of electricity consumers continue to receive their bill by post, falling to 35% of natural gas consumers. These results are similar to those from the domestic consumer insight tracker, and indicate that the majority have moved away from the traditional paper bill.
- It is interesting to see how customers deal with correspondence from their energy supplier. While over half (55%) read it and understand most or all of it, 41% say they don't read it or only glance at it. Again, this was consistent with the findings for domestic consumers.
- While approximately half of non-domestic consumers were aware of Invest NI, the Federation of Small Business, and Local Council as sources of information and advice on energy matters, only around 1 in 20 had used them.
- 21% of electricity consumers scored their experience of interacting with their energy supplier as 'very positive'. However, mid-sized businesses (10 to 49 employees) and those

in hospitality were more likely than those in the other size categories or sectors to give a negative answer. For both electricity and gas, respondents who had switched their supplier in the last 5 years were significantly more likely to describe this experience as positive than those that had not switched.

Complaint handling

- 8% of non-domestic consumers have made a complaint to their energy supplier in the last five years. This is somewhat lower than the percentage of domestic consumers having done so.
- Over one quarter (27%) of those who had complained to their electricity supplier reported that their issue was resolved on the same day the complaint was made and a further 41% found a resolution within two weeks. Non-domestic consumers are having their issues resolved more efficiently than domestic consumers.
- Almost two thirds (63%) were satisfied or very satisfied with the outcome of their complaint. This is considerably higher than for domestic consumers at 40%.
- Almost all (95%) of those who had never complained said they had never had reason to do so, although 72% would know how to go about complaint. 27% were unfamiliar with the complaint's procedure.

Satisfaction with services provided

- Businesses and organisations were asked to rate their energy suppliers out of 10. Taking a score of 8 or more as satisfied, 63% and 62% were satisfied with their electricity and gas supplier respectively. Mid-sized respondents were less likely to be satisfied than those in the other size categories.
- On the same scale, trust levels were markedly lower than satisfaction levels. 45% and 35% said they trusted their electricity and natural gas suppliers to give them clear information and a fair price respectively. Similar to the above findings, trust was lower among mid-sized businesses. However, non-domestic consumers appear to have greater levels of satisfaction and trust in their energy suppliers than householders.
- Despite high satisfaction scores, only 2 in 5 (42%) respondents would recommend their electricity supplier to a friend or colleague; giving a Net Promoter Score of -24. Half (50%) of gas respondents would recommend their supplier; giving a Net Promoter Score of -22.
- There appears to be no strong relationship between switching behaviour and satisfaction, trust or likelihood to recommend electricity supplier. Both switchers and non-switchers reported similar levels of satisfaction, while non-switchers reported slightly higher levels of trust and likelihood to recommend. However, those who had switched gas supplier in the last 5 years were more likely to be satisfied and reported higher levels trust and likelihood to recommend than non-switchers.

Energy efficiency, renewables and decarbonisation

- An equal percentage of respondents had undertaken energy efficiency measures in the last 3 years as had not (49%).
- Those consumers with electricity but not natural gas are significantly less likely (at the 95% confidence level) to have undertaken energy efficiency measures than those with both energy types. Businesses and organisations are more likely to have taken these measures than domestic consumers.
- Over half (55%) said it was important or very important to their business (4 or 5 on the scale)
- Over a quarter (27%) said they were 'not at all aware' of the radical changes taking place in the energy sector driven by technology, climate change etc.

Impact of Covid-19 pandemic on energy usage

- Almost two thirds (63%) of respondents said their energy usage had reduced as a result of the pandemic.
- Those in hospitality, public administration and community/voluntary were most likely to have seen a reduction.

Conclusions and areas for consideration

The follow paragraphs outline a number of overarching trends within the data and areas which the Utility Regulator may wish to explore further in order to improve outcomes when the survey is repeated in the future. In highlighting the following areas, we have reflected on key priorities within the Utility Regulator's corporate strategy as follows:

- Improving consumer trust and satisfaction with energy suppliers;
- Improving knowledge and satisfaction with the consumer protection arrangements in NI; and
- Improving consumer satisfaction with the switching process.

For most spending on energy is not a top-of-mind issue

For many non-domestic consumers, energy spending does not appear to be a top-of-mind issue. For most, spending on energy makes up only a small proportion of overall outgoings and on the whole, businesses and organisations do not appear to be looking to neighbouring jurisdictions to compare costs. Most were unable to compare NI's energy costs to those of ROI or GB when asked. Spending on energy does not appear to be a major concern for most non-domestic consumers.

However, it should be noted that there are a number of businesses for whom spend on energy is a considerable part of their outgoings. These tend to be within the manufacturing/production, hospitality, and community/voluntary sectors. Any changes in energy prices, therefore, could have a disproportionate and considerable impact on this group of consumers.

Revised approaches to communication to improve supplier knowledge and awareness of minimum standards

A considerable minority (37%) of non-domestic consumers were unaware of the existence of minimum standards for customer service within the energy markets and 65% and 53% of electricity and gas consumers respectively reported having little knowledge of their supplier. At the same time, 41% of respondents say they don't read or only glance at correspondence from their supplier. Although it may be challenging to achieve break through given the current approach that customers have towards communication with their energy suppliers, the Utility Regulator may wish to work with suppliers to explore different and more effective approaches to communicating with consumers, in order to improve understanding of the energy markets.

Increased competition is not translating to improved consumer experience

Despite the intended benefits of competition in the NI energy market, most respondents perceived 'no change' in respect of service provided, responsiveness of suppliers and availability of suppliers which suit individual needs. Responses were more positive in relation to the cost of energy and tariff options. The Utility Regulator may wish to further investigate the ways in which suppliers are interacting with and serving non-domestic consumers to improve these outcomes when the tracker is repeated.

Addressing the specific needs of the hospitality sector

The views of the hospitality sector on the impact of improved competition were particularly negative. This may be a reflection of the mood of the sector in light of the disproportionate impact of the Covid-19 pandemic on businesses of this type, however they were accompanied by lower levels of awareness of supplier and tariff choice as well as of the existence of minimum standards of service. Hospitality businesses were also more likely than any other sector to report the experience of interacting with their electricity supplier as negative. These findings may be linked to the low incidence of switching within the sector, as findings elsewhere in the survey indicate that recent switching is associated with higher levels of understanding of the energy market and more positive experiences of interacting with suppliers. As hospitality businesses are likely to be larger energy users, the Utility Regulator may choose to more specifically explore the needs and level of engagement of this sector in relation to the energy markets.

Looking again at information and resources on the energy markets

Over a quarter of electricity and natural gas consumers report that comparing energy deals is difficult. This was particularly the view among those in rural locations. There is evidence, however, that non-domestic consumers are not aware of or are not using available resources which may enable them to make more informed choices. Three quarters (75%) were unaware of the Consumer Council price comparison tool and while around half of respondents knew about information and advice offered by Invest NI, the Federation of Small Business and Local Council, only one in twenty had actually used their services. The Utility Regulator may wish to encourage and support CCNI to promote the price comparison tool, as well as promoting the other available resources in this area.

Effective complaints process

Non-domestic consumers reported better responsiveness and overall satisfaction in respect of how complaints were handled than their domestic counterparts. Only very few had complained at all, but the vast majority of those who had not complained also said they had never wished to do so. Most understood how to go about making a complaint, therefore the process itself is not a barrier. These findings indicate that suppliers are performing well in terms of complaint handling.

Missed opportunities to secure best energy deals

Businesses and organisations appear to prioritise convenience over cost while their energy supplier continues to meet their expectations, with over two thirds of both electricity and natural gas consumers saying they did not switch because they were happy with their current service compared to 9% and 14% who felt they were on the cheapest option. This finding is reflected to some extent in the satisfaction ratings given by non-domestic consumers to their energy suppliers, alongside low incidence of complaints and unreported complaints.

The low rate of switching is particularly noteworthy given the overwhelmingly positive experience of those who do switch, indicating that the process of switching itself is not a barrier. However, there is a clear relationship between switching supplier and likelihood of being on a promotional tariff. As incidence of switching and intended switching are low overall and particularly for smaller businesses, there may be missed opportunities for non-domestic consumers to avail of better value for money in the energy markets. The Utility Regulator may wish to encourage small businesses in particular to take a more proactive role in securing best value for money from their energy suppliers.

Some satisfaction, with lower levels of trust or likelihood to recommend

While many respondents were reportedly satisfied with the service provided by their energy suppliers, this was accompanied by low levels of trust in suppliers to provide clear information and fair prices and lower levels still of likelihood to recommend their supplier to a friend or colleague. The Utility Regulator may wish to better understand the reason behind these outcomes. A considerable proportion of consumers, for example, rated satisfaction in the middle of the scale, which may be indicative of low engagement between the consumer group and their suppliers and could be linked to the low levels of knowledge and awareness of the minimum service standards reported elsewhere in the survey.

Greater engagement resulting in better outcomes for some measures but not others

Engagement, measured in terms of switching behaviour, was associated with better understanding of certain aspects of the energy markets. Those who had switched in the last 5 years were significantly more likely to report having some or good knowledge of their suppliers than those who had not switched (46% compared to 28% for electricity supplier; 64% compared to 41% for gas supplier). Switchers were also significantly more likely to be 'completely aware' of having a choice of suppliers and tariff types than non-switchers (71% compared to 52% for choice of supplier, and 67% compared to 46% for choice of tariff). Switchers were also significantly more likely than non-switchers to perceive an improvement

in service and tariff options available as a result of increased competition in the energy markets.

Recent switching of gas supplier is associated with improved outcomes in terms of overall satisfaction, trust, and likelihood to recommend. However, this pattern was not repeated with electricity suppliers. Those who had recently switched electricity supplier and those who had never switched instead reported almost identical levels of satisfaction, and those who had never switched also recorded higher levels of trust in and likelihood to recommend their electricity supplier than those who had switched in the last 5 years. The Utility Regulator may wish to carry out additional research to determine the drivers behind satisfaction with energy suppliers.

Looking again at the experiences of mid-sized businesses

In responses to key questions, mid-sized businesses (those with 10 to 49 employees) returned more negative outcomes than those in the other size categories. They were less likely to be satisfied with the overall service provided by their electricity or gas supplier, less likely to trust their suppliers and were also more likely to report the experience of interacting with their suppliers as negative. There may be a number of reasons for this trend.

Mid-sized businesses were significantly less likely to have been appointed a key contact person or account manager by their supplier than those with 50 or more employees, however businesses and organisations at the upper limit of the size range may have similar or growing energy needs and requirements to those in the largest grouping. The Utility Regulator may wish to explore further the reasons behind these outcomes for mid-sized consumers and take measures aimed at improving the experience of this category specifically.

Opportunity for awareness-raising around energy transition

A considerable proportion of businesses reported having undertaken energy efficiency measures in the last three years, however an equal proportion had not done so. Smaller consumers were considerably less likely to have undertaken such measures. For the majority of respondents who had not made these changes, there was no specific reason for inaction or they 'don't think they are needed'. Alongside this, 25% rated climate change as unimportant to the business and a similar proportion were 'not at all aware' of the radical changes taking place in the energy sector. Given this, there may be an awareness raising or educational piece for the Utility Regulator to undertake to help prepare businesses for the ongoing energy transition. This is particularly necessary for small sized non-domestic consumers.

Clear impact of the Covid-19 pandemic

Almost two thirds of respondents reported a reduction in energy usage due to the pandemic. This finding indicates the severity of the impact of pandemic on organisations and businesses.

Introduction

Background

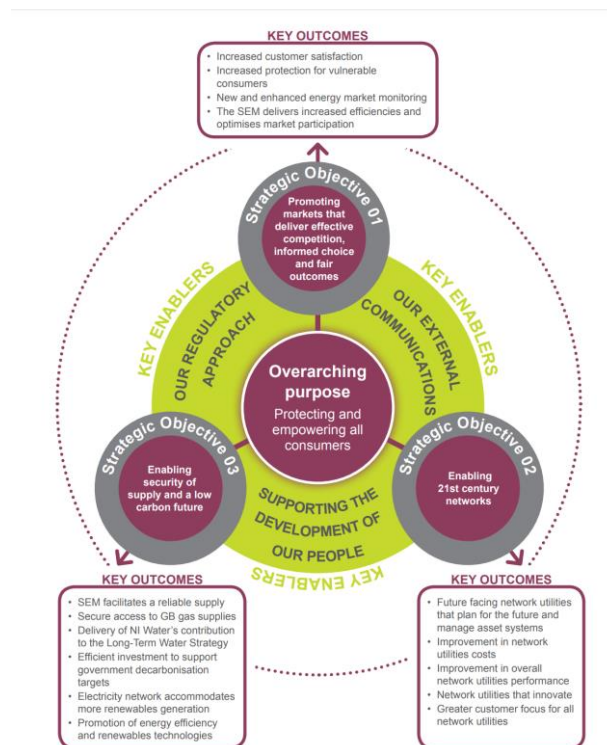
The Utility Regulator is the independent non-ministerial government department responsible for regulating Northern Ireland’s electricity, gas, water and sewerage industries. The Utility Regulator works to deliver a number of key statutory objects including, to protect the short and long-term interests of electricity, gas, water and sewerage consumers with regard to price and quality of service.

To support its mission, the Utility Regulator has identified a need to better understand the non-domestic energy consumer perspective in Northern Ireland, in line with best practice, through direct interaction and statistically robust research with the sector. In August 2020, the Utility Regulator commissioned Perceptive Insight, an independent market research company, to carry out an initial ‘baseline’ survey to measure consumer engagement, experience and attitudes on a number of areas within the non-domestic energy markets in Northern Ireland.

Corporate strategy

The survey outcomes will measure progress against key targets in the Utility Regulator’s Corporate Strategy 2019 - 2024 “Protecting Consumers Today and Tomorrow”.

Figure 1: Overview of the Utility Regulator’s Corporate Strategy 2019-2024



Relevant targets include those under ‘promoting markets that deliver effective competition, informed choice and fair outcomes’, measured in part by:

- % of customers who trust and are satisfied with their energy supplier;

- % of customers who are satisfied with consumer protection arrangements in NI; and
- % of customer who are satisfied with the switching process.

Research aims & objectives

The research objective was to conduct a statistically robust and repeatable survey with non-domestic energy consumers in Northern Ireland to provide baseline data for planning and activity under the Utility Regulator's Corporate Strategy 2019 – 2024.

The aims of the research were as follows:

- To measure consumer engagement, experience and attitudes in the non-domestic markets in Northern Ireland;
- To highlight the issues that impact this consumer group and how these may have changed over time; and
- To assess the extent to which non-domestic energy consumers have an understanding of the requirements in relation to the energy transition to a decarbonised whole energy system.

Report structure

The report begins with an overview of the survey methodology and an outline of respondent demographics. The subsequent sections explore each of the survey themes as follow:

- Billing and affordability
- Understanding of the energy market
- Switching
- Communication and methods of contact
- Complaint handling
- Satisfaction with service provided
- Energy efficiency, renewables and decarbonisation
- Impact of Covid-19 pandemic on energy usage.

Given the sample size, it is not always possible to make statistically significant inferences from the data, however key findings and trends are identified throughout. Where relevant statistically significant results exist at the 95% confidence level, these are clearly highlighted. Comparisons are made with the findings of the 2019 Domestic Consumer Insight Tracker where possible.

The report concludes by highlighting areas for further consideration and with possible implications for the Utility Regulator Corporate Strategy.

Methodology

This section provides an overview of the approach taken in the design and implementation of the survey research. For a more detailed description of the methodology, please see Appendix A.

Approach

Perceptive Insight undertook a statistically representative survey of non-domestic energy consumers in Northern Ireland using a telephone interviewing methodology. Interviewing took place during August and September 2020 with each interview taking, on average, 10 to 15 minutes to complete. Interviewing was carried out in compliance with the GDPR 2018 and the Market Research Society Code of Conduct.

Questionnaire design

The questionnaire was designed in collaboration with the Utility Regulator project team. Where possible, questions were designed to allow for comparison with the 2019 Domestic Consumer Insight Tracker survey.

Sample design

The inclusion of a number of screening questions at the start of the survey ensured that interviews were conducted with organisations that have a business energy contract and with the person within the organisation who has sole or joint responsibility for bill payment.

A stratified sampling approach was implemented to provide sufficient numbers for subgroup analysis. This involved oversampling of larger non-domestic consumers, with the full data set weighted at the analysis stage to be representative of the Northern Ireland business population. Quotas were set based on the Inter-Departmental Business Register (2019) for:

- Sector;
- District Council; and
- Urban/Rural location.

For the purposes of the survey, business sectors were defined according to 2-digit SIC code classifications. The agriculture sector was excluded from the survey due to its specific energy requirements. It should be noted that, in order to ensure sufficient numbers of main gas consumers for subgroup analysis, responses from the Greater Belfast area were overrepresented in the final results. This is reflective of the maturity of the natural gas distribution network in Northern Ireland.

Respondent demographics

Sector, size and location

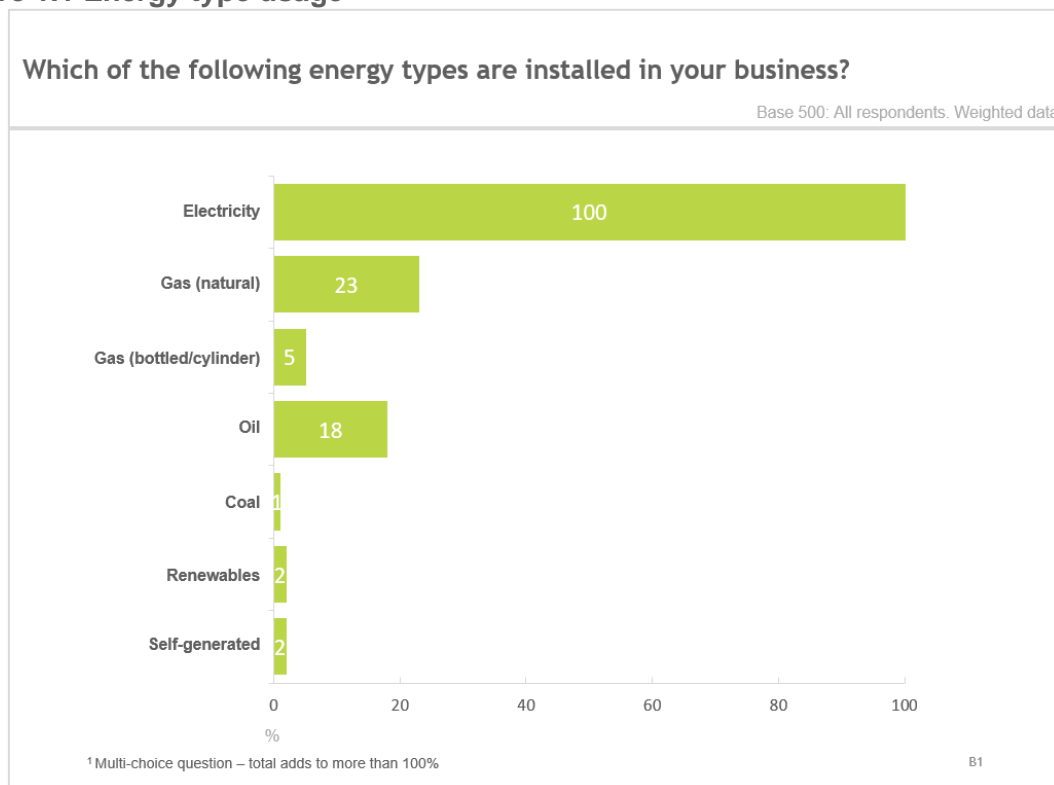
The table below indicates the final unweighted and weighted survey responses achieved by sector, size, and location. Unweighted bases are shown throughout the report. Percentage figures are based on weighted survey data.

STRATIFICATION VARIABLE		UNWEIGHTED		WEIGHTED	
		NO.	%	NO.	%
SIZE	50 or more employees	96	19%	10	2%
	10 to 49 employees	174	35%	45	9%
	9 or fewer employees	230	46%	445	89%
SECTOR	Construction	80	16%	80	16%
	Leisure, hotels & catering	58	12%	43	9%
	Manufacturing & production	83	17%	77	15%
	Professional services	110	22%	136	27%
	Retail, distribution & other service	81	16%	98	20%
	Public administration	47	9%	27	5%
	Community & voluntary	41	8%	40	8%
LOCATION	Greater Belfast	163	33%	145	29%
	Outside Greater Belfast	337	67%	355	71%
URBAN/RURAL	Urban	294	59%	292	58%
	Rural	164	33%	172	34%
	Both (Mixed across sites)	42	8%	36	7%
TOTAL		500	100%	500	100%

Type of energy used and supplier

The following charts provide a breakdown of respondents by the type of energy used and supplier. All respondents to the survey had an electricity supply. 23% used natural gas, while 18% used oil.

Figure 1.1 Energy type usage



Natural gas use

Larger organisations and those in the public administration and community/voluntary sectors were most likely to be natural gas users. Most natural gas users were in the Greater Belfast area.

Figure 1.2 Natural gas usage by business size and sector

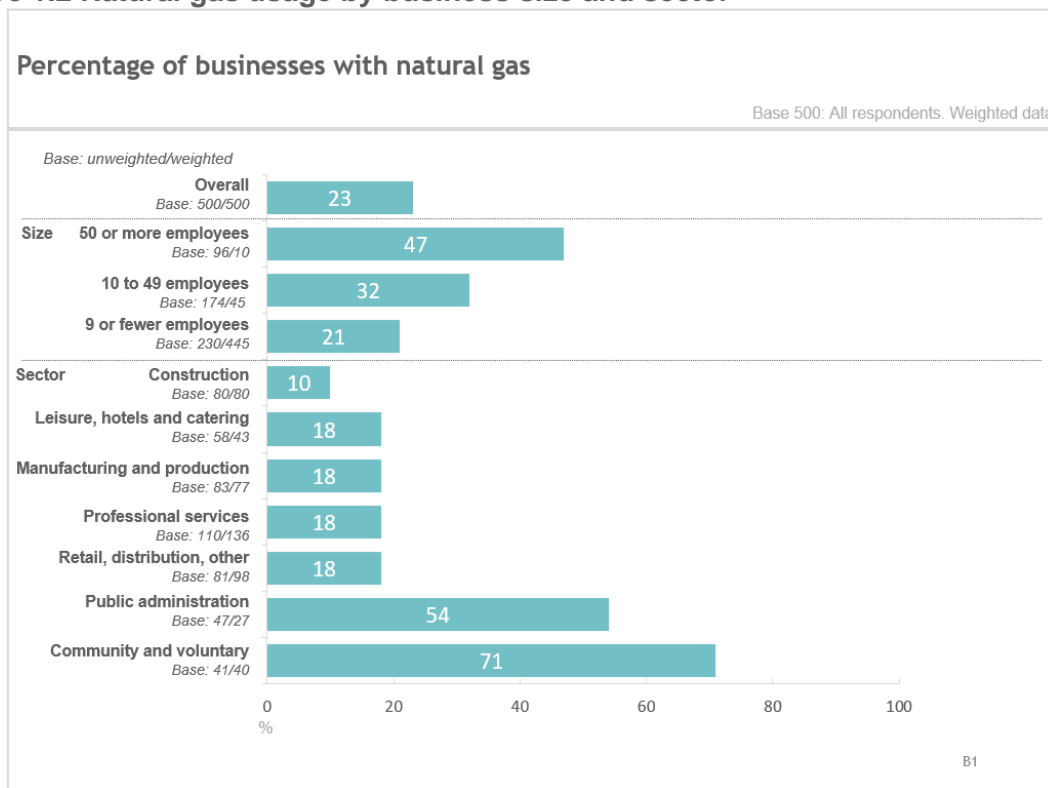
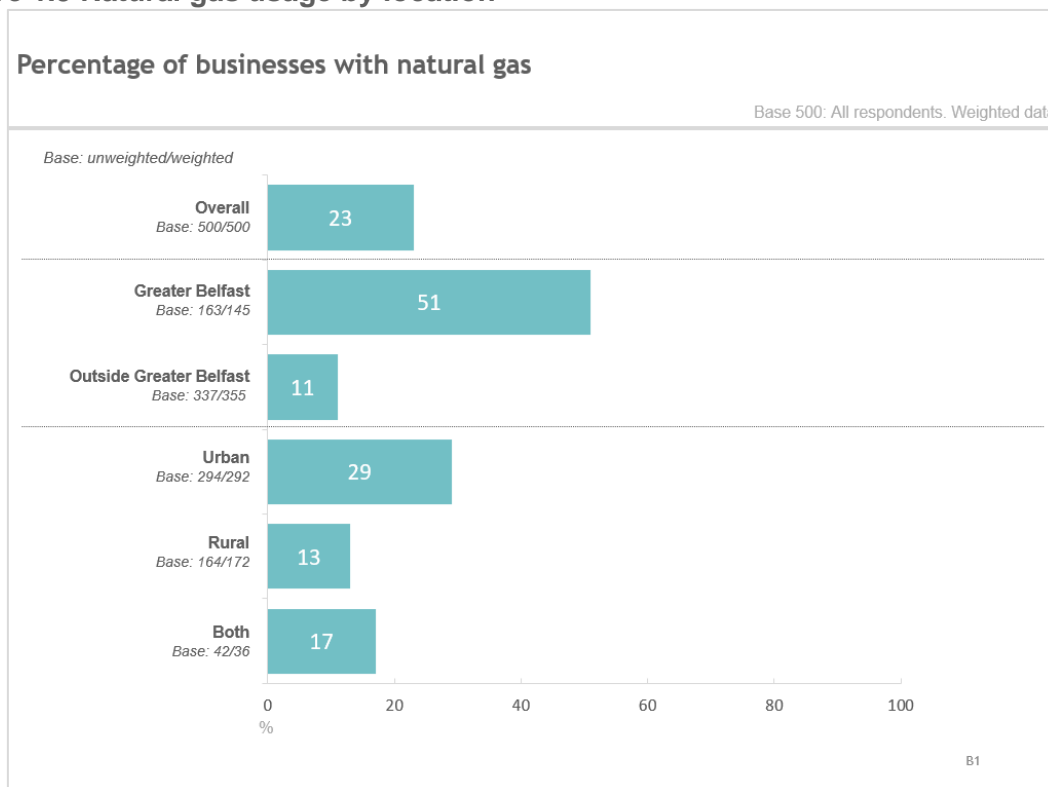


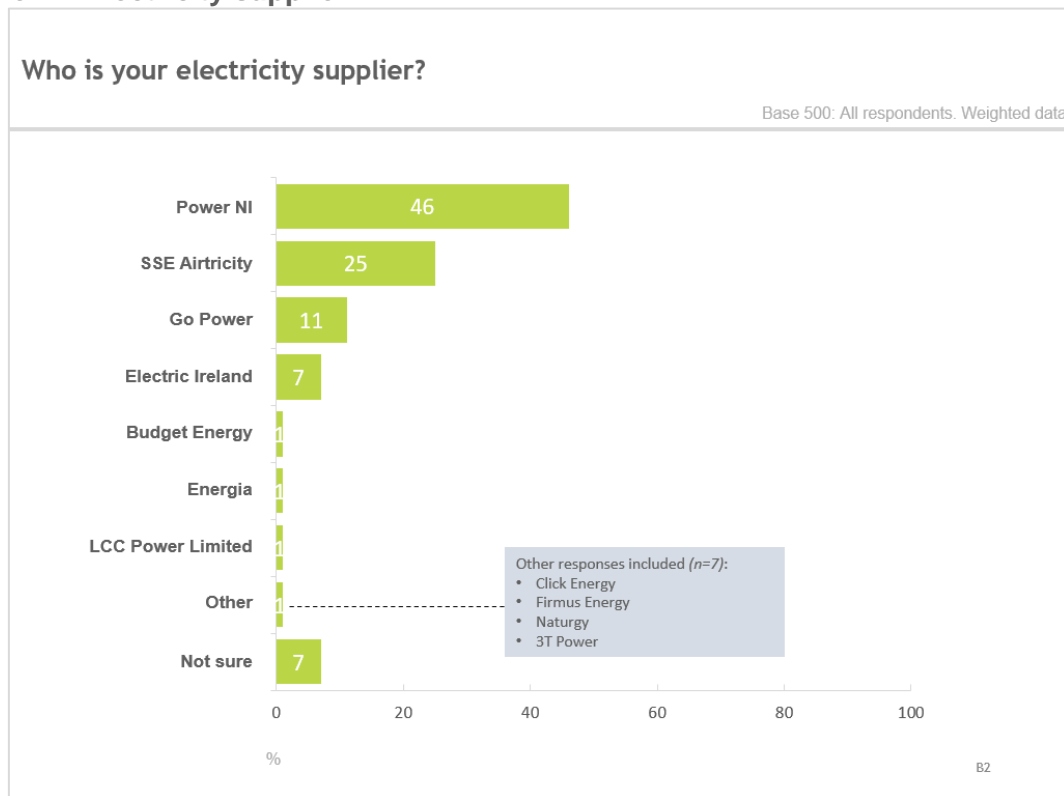
Figure 1.3 Natural gas usage by location



Electricity supplier

The most common electricity supplier was Power NI at 46%, followed by SSE Airtricity at 25%.

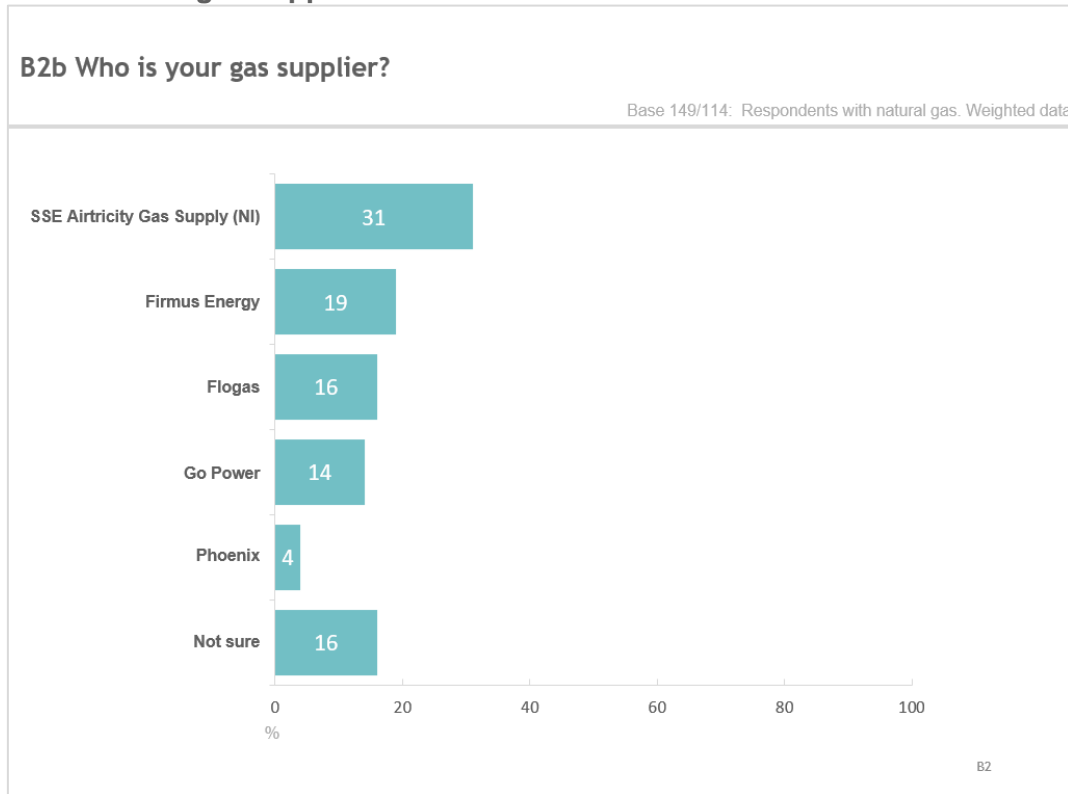
Figure 1.4 Electricity supplier



Gas supplier

There was greater distribution across natural gas providers within the respondent group. 31% were with SSE Airtricity, followed by 19% with Firmus Energy and 16% with Flogas.

Figure 1.5 Natural gas supplier



Billing and affordability

In this section we explore the views and experiences of organisations in relation to the following:

- Spending on electricity and gas;
- Spending on electricity and gas as a proportion of total outgoings;
- Cost of energy in Northern Ireland compared to the Republic of Ireland and Great Britain; and
- Energy contract and tariff types.

Key findings

- Spending on energy is not a major outgoing for most businesses, with 47% for electricity and 51% for natural gas saying costs represented 4% or less of total outgoings. However, energy price changes could have a considerable impact on some businesses in specific sectors.
- For many non-domestic consumers, energy spending is not a top-of-mind issue. This is evidenced by the considerable numbers unable to estimate their energy spending for the survey (18% for electricity; 17% for gas) or to compare Northern Ireland energy prices with those of the Republic of Ireland (67%) and Great Britain (62%).
- As with domestic consumers, businesses and organisations are more likely to negatively compare NI energy costs to those of GB than ROI. 12% thought energy in NI was more expensive than in ROI, compared to 21% for GB.
- The majority of both electricity and natural gas consumers stated that they are on their supplier's standard variable tariff rather than a promotional tariff (58% and 53% respectively). As might be expected, smaller businesses were less likely to be on a promotional tariff. This pattern was repeated for the professional services sector.

Spending on gas and electricity

Respondents were asked to detail their spending on energy, including VAT, in the last 12 months.

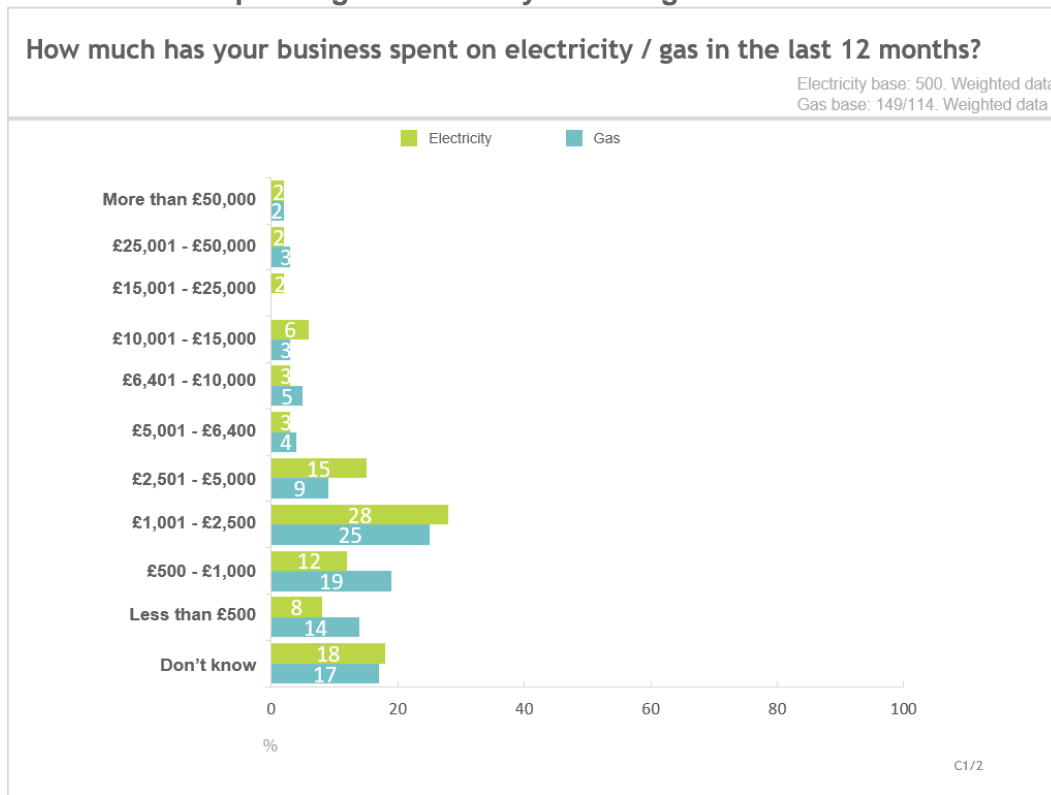
Electricity

Most businesses had spent amounts on electricity on the lower end of the scale with the largest percentage (28%) falling into the £1,001 to £2,500 range. As would be expected, spending tended to be in proportion to business size, with a greater number of organisations of 50 or more employees in the highest spending range. The hospitality sector also tended towards higher spending. Notably, 18% of respondents did not know how much the organisation had spent on electricity in the previous 12 months.

Gas

Similarly, spending on natural gas tended towards the lower end of the scale, with a quarter (25%) within the £1,001 to £2,500 range. Again, 17% were unable to estimate a figure for spending on gas.

Figure 2.1 Business spending on electricity/ natural gas

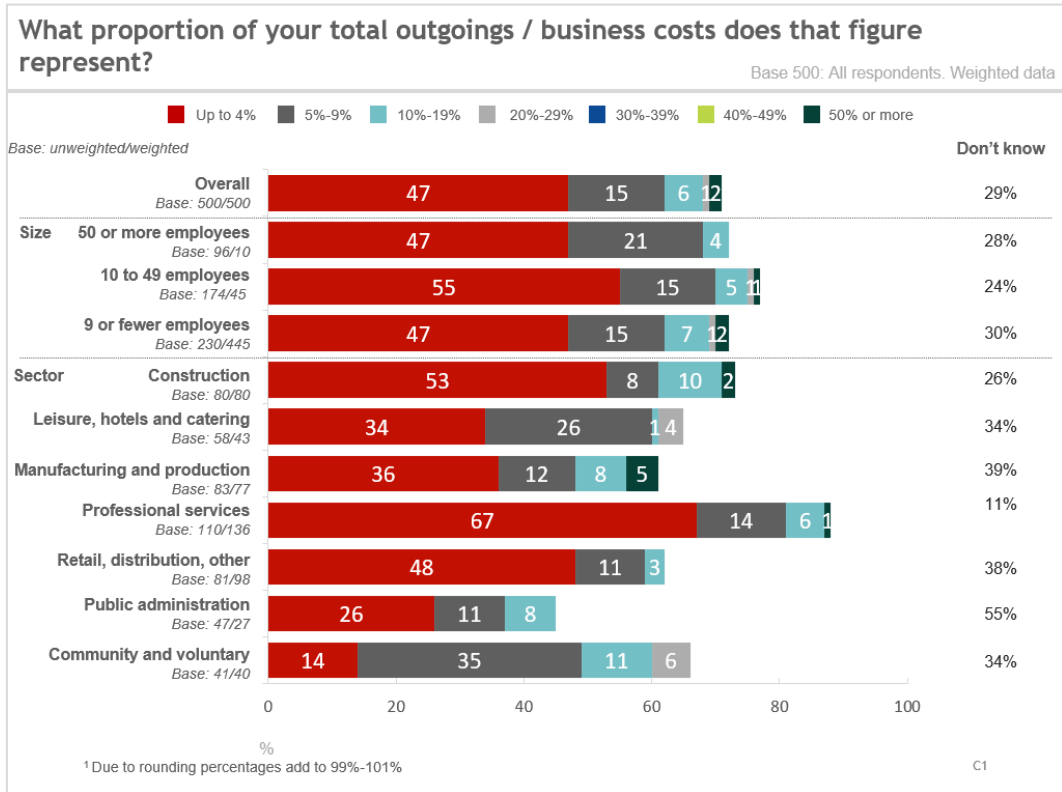


Spending as a proportion of total outgoings

Electricity

Just under half (47%) reported that spending on electricity represented 4% or less of total outgoings. Again, a high percentage (29%) were unable to give a response to this question. While spending on electricity as a proportion of total outgoings is small for the majority of businesses, there are certain sectors for which spending on energy is a greater priority. Notably, for 1 in 20 (5%) of those in manufacturing/production, electricity spending represents 50% or more of their total outgoings. For those in the hospitality and community/voluntary sectors, spending on electricity also tended to represent a greater proportion of total outgoings than for those in other sectors. Any changes, therefore, in electricity prices are likely to have a disproportionate impact on these sectors. This may be of particular concern at a time when hospitality is under increased pressure from Covid-19 restrictions.

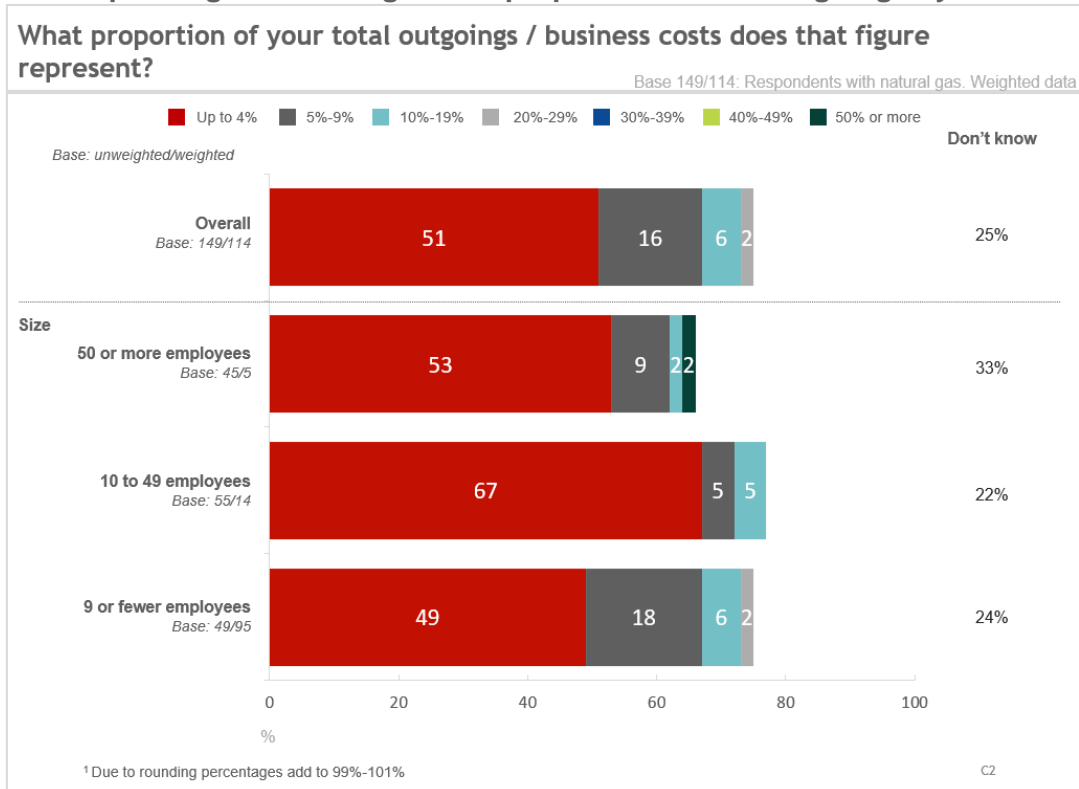
Figure 2.2 Spending on electricity as a proportion of total outgoings by size and sector



Gas

Over half, (51%) of those with natural gas reported spending as 4% or less of total outgoings and a quarter (25%) did not know what proportion of total outgoings their spending on gas represented.

Figure 2.3 Spending on natural gas as a proportion of total outgoings by size



The high percentages unable to respond to questions in this section of the survey may indicate that energy spending is not a top-of-mind issue for many within the non-domestic sector. This is supported by the large numbers reporting low spending on energy overall, and particularly as a percentage of total outgoings.

Cost of energy in Northern Ireland compared to elsewhere

Organisations were asked to compare the cost of energy in Northern Ireland (NI) to that in the Republic of Ireland (ROI) and Great Britain (GB). This section was again notable for the high percentage of 'Don't know' responses given. 67% and 62% were unable to make a comparison to each jurisdiction respectively.

Overall, 11% described the cost of energy in NI as cheaper than in the ROI, 10% as similar, while 12% thought it more expensive. The percentage making a negative comparison was higher for GB, with 21% describing energy in NI as more expensive, 9% as similar, and only 7% suggesting it was cheaper. Larger organisations and those in the retail/distribution and public administration sectors were most critical of Northern Ireland's energy costs compared to Great Britain. The community/voluntary sector, in contrast, compared Northern Ireland favourably to both.

Figure 2.4 Cost of energy in Northern Ireland compared to ROI by size and sector

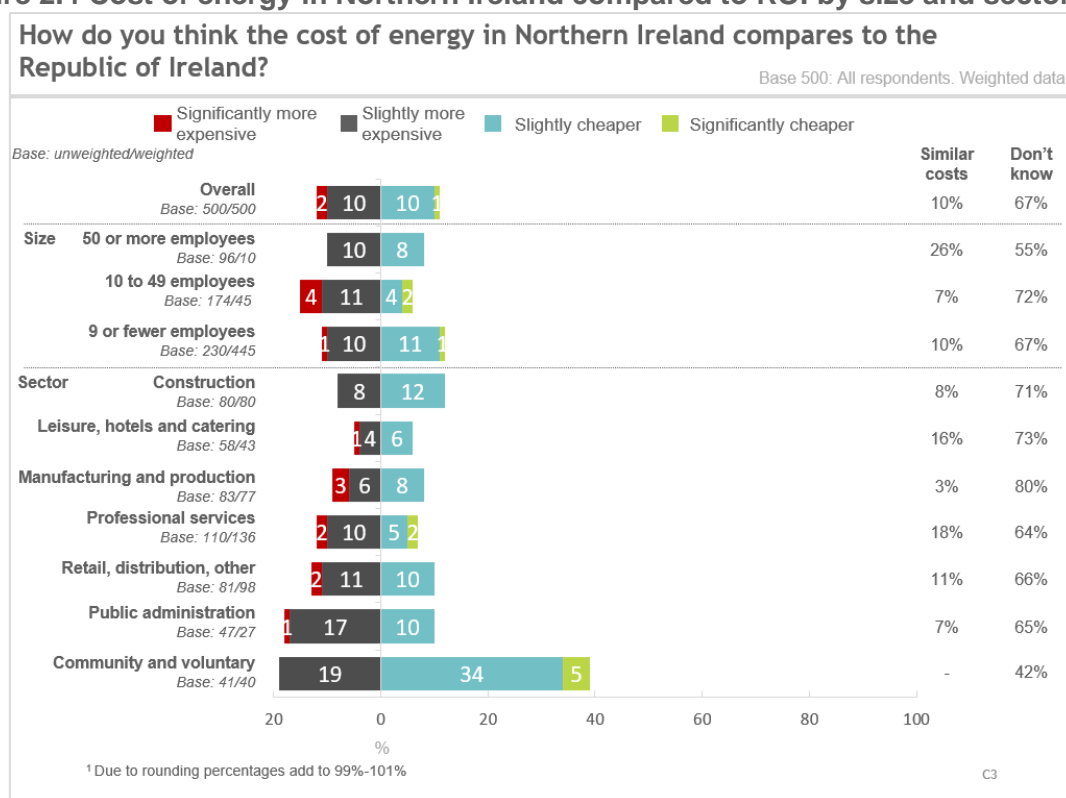
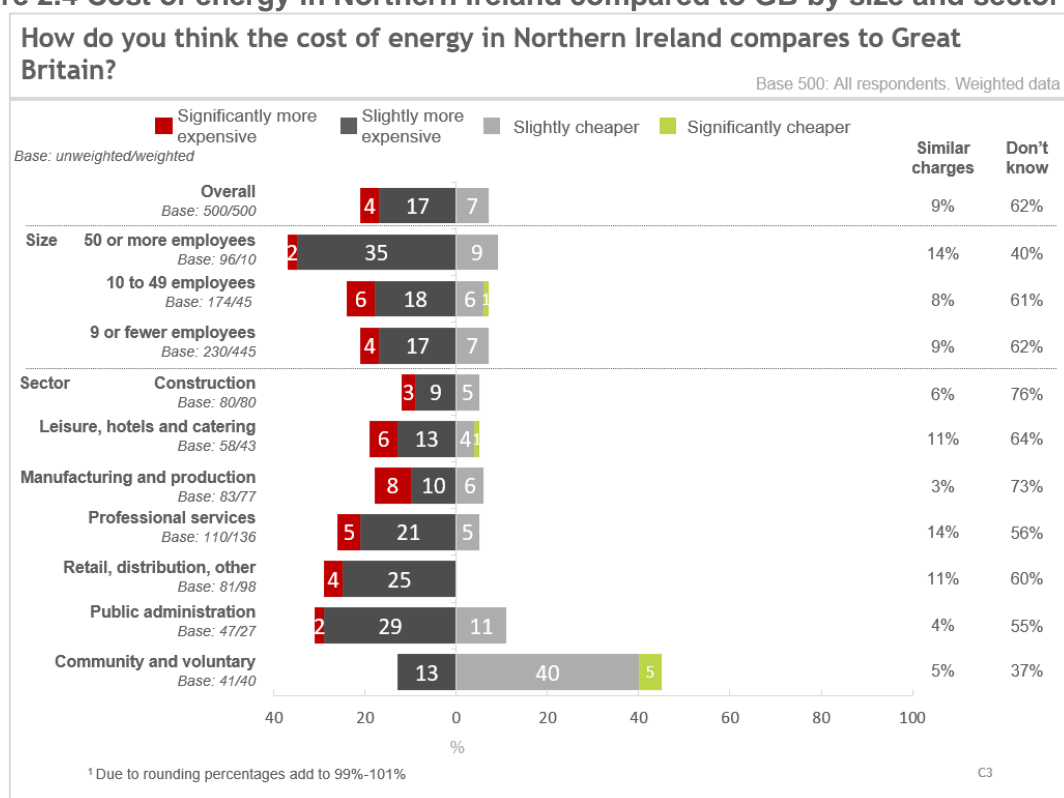


Figure 2.4 Cost of energy in Northern Ireland compared to GB by size and sector



These findings have parallels with the response obtained by the domestic consumer insight tracker survey. Many domestic consumers were also unable to compare NI energy costs to those in ROI and GB with 43% and 27% answering 'don't know' respectively. They were also more likely to find NI energy slightly or significantly more expensive when compared to GB than to ROI (39% compared to 19%). This was despite evidence that NI domestic consumers face lower electricity and gas prices than in either ROI or GB.¹

Energy contract and tariff types

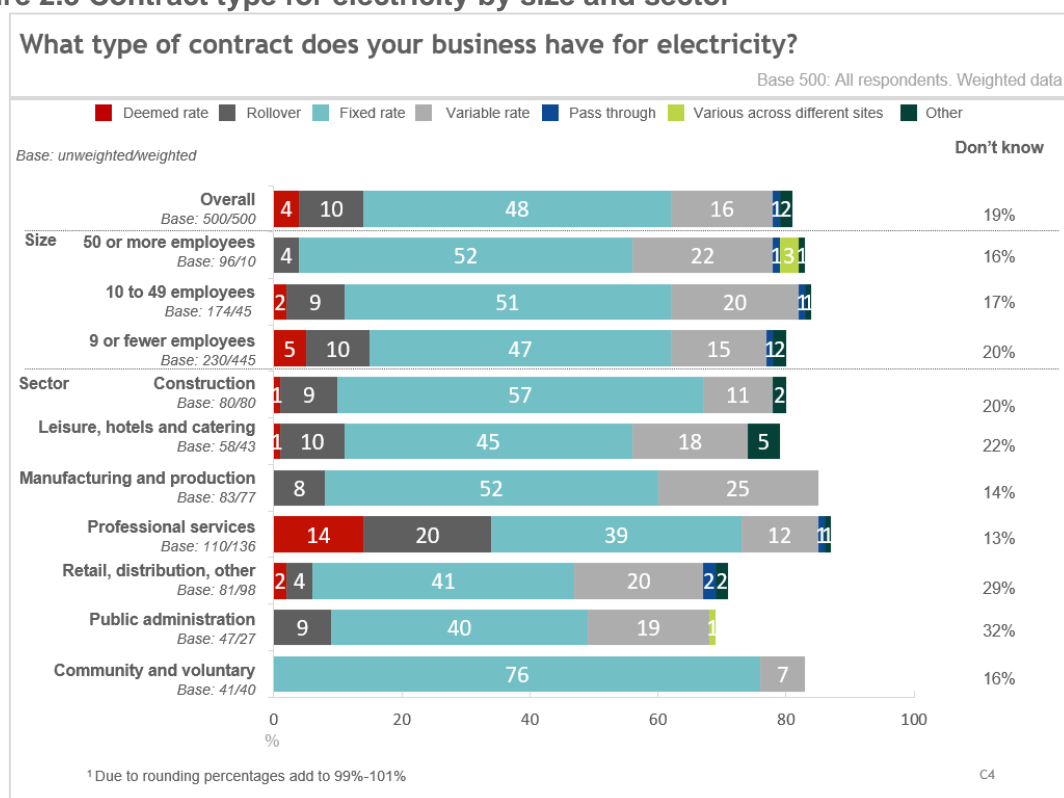
Respondents were asked to provide their organisation's contract and tariff type for electricity and gas.

Electricity

Just under half (48%) had a fixed rate electricity contract, with variable rate being the second most common contract type (16%). 19% of respondents did not know what type of electricity contract the organisation had. Smaller organisations were more likely to have deemed or rollover rate contracts. However, the differences are not as marked as may be expected (5% and 10% respectively for the smallest size category, compared to 1% and 4% respectively for those with 50 or more employees). The professional services sector also returned higher numbers for deemed and rollover rates than any other sector (14% and 20% respectively). This indicates a higher level of disengagement from the energy market for businesses in this sector.

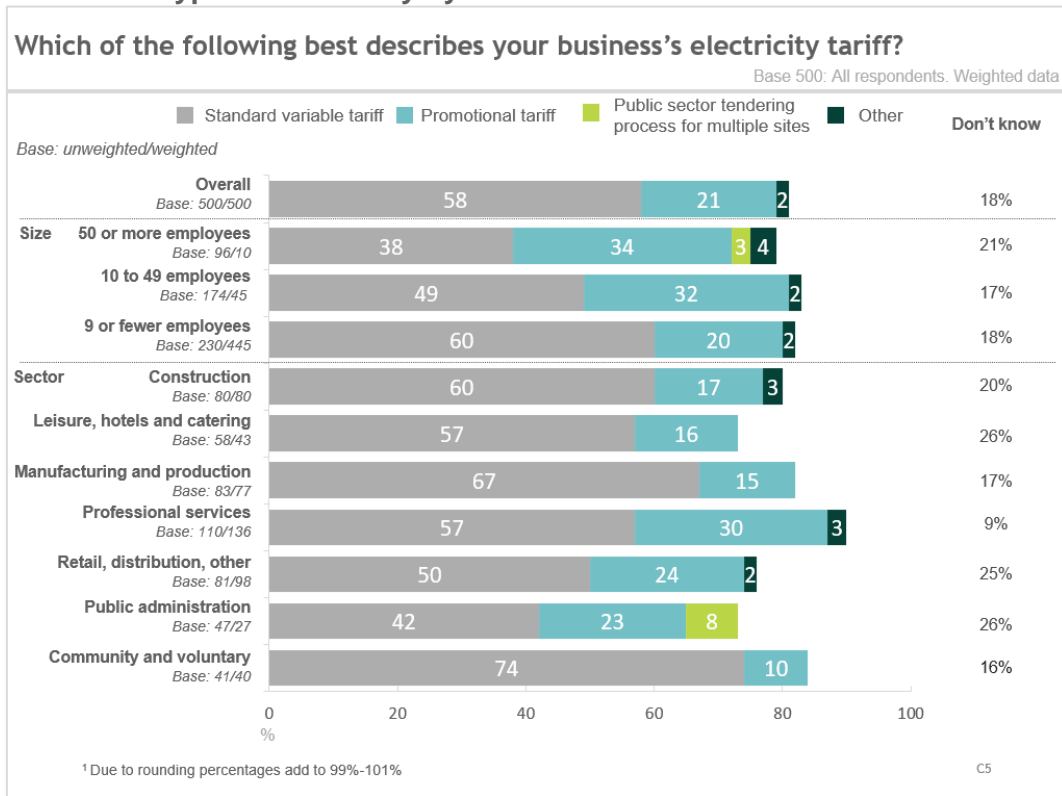
¹ Northern Ireland Domestic Consumer Insight Tracker 2018/2019: Findings (CEPA & Impact Utilities: March 2019), pg55.

Figure 2.5 Contract type for electricity by size and sector



The majority of consumers (58%) reported being on their supplier’s standard variable tariff for electricity, while 21% were on a promotional tariff. This result is inconsistent with the 48% of respondents saying they are on a fixed rate electricity contract and indicates a lack of understanding or awareness within the consumer body of what the various contract and tariff options entail. In particular, it may indicate that respondents are unaware that the price per unit of energy can change monthly on a supplier’s default (standard variable) tariff. Organisations with 1 to 9 employees were much less likely to be on a promotional tariff than those in the larger size categories (20% compared to 32% for mid-sized and 34% for those with 50 or more employees). This indicates that smaller companies are not negotiating the best electricity prices for their business. There may be a number of reasons for this, including low motivation due to low overall energy costs or a lack of awareness of the options available. As might be expected, those electricity consumers who had switched supplier in the last 5 years were significantly more likely (at the 95% confidence level) to be on a promotional tariff than those who hadn’t switched (30% compared to 17%).

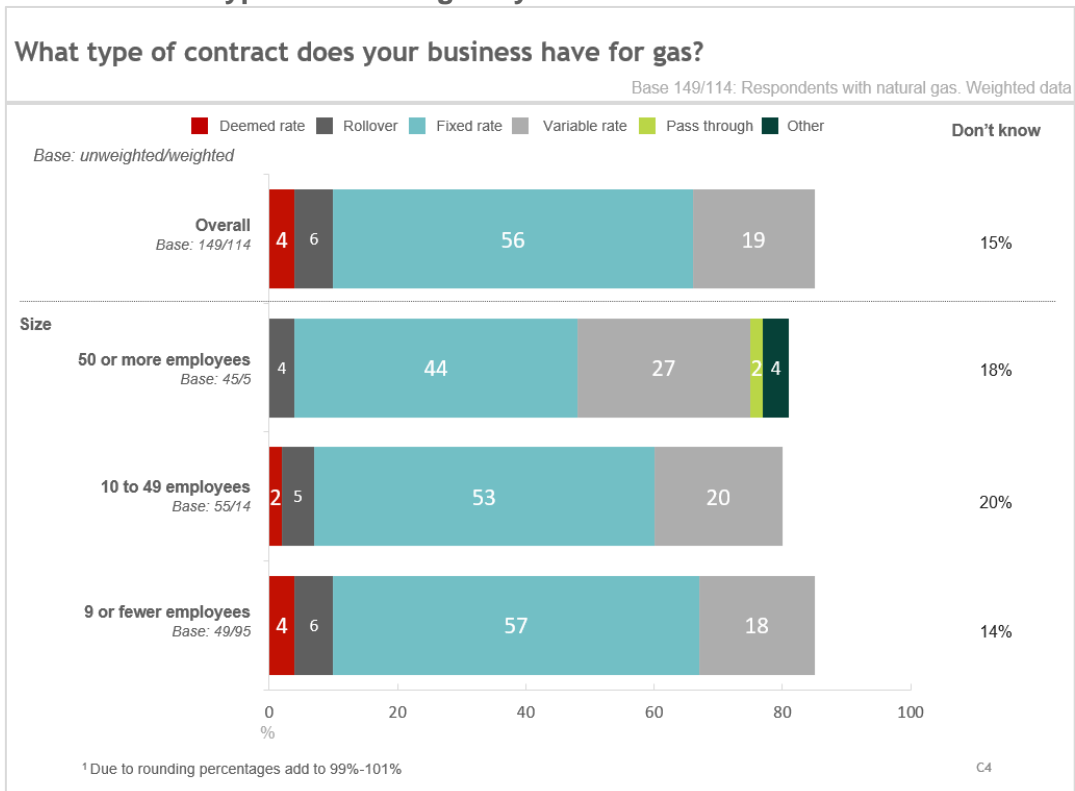
Figure 2.6 Tariff type for electricity by size and sector



Gas

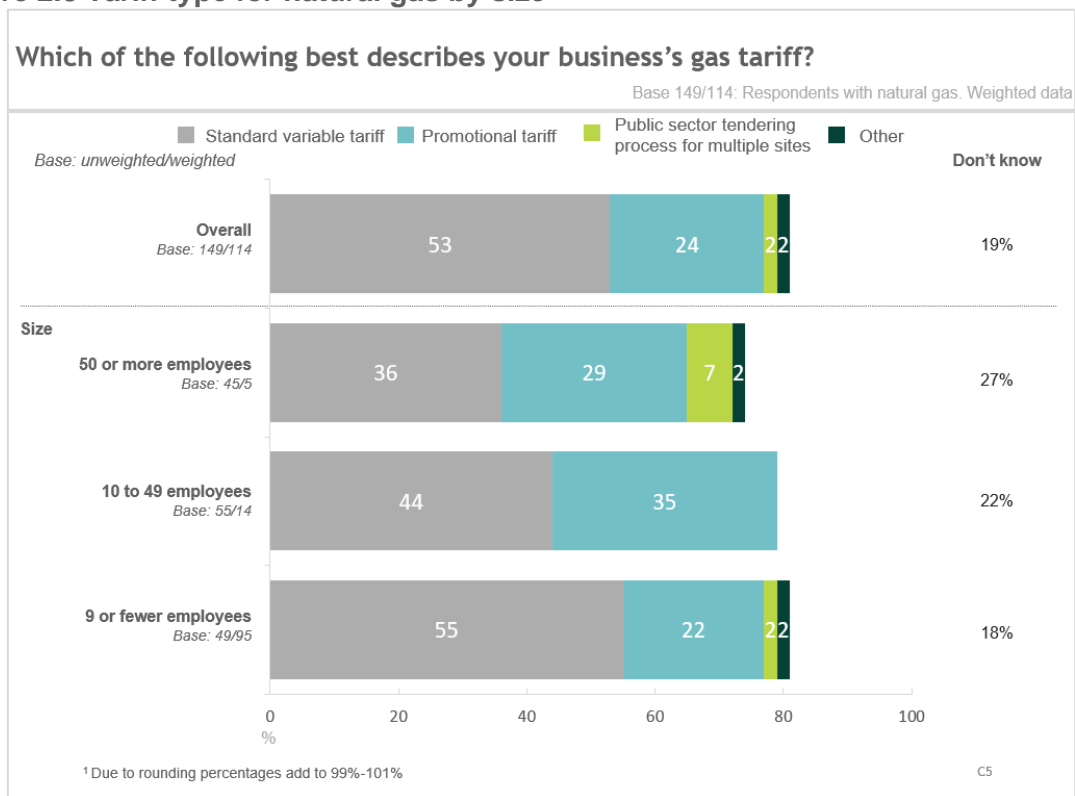
Over half (56%) of respondents with natural gas were on a fixed rate contract, with 19% on variable rate. As with electricity consumers, a considerable number (15%) were unable to name their organisation's gas contract type. Again, smaller organisations were more likely to be on deemed or rollover rate contracts, however the percentages were small across all size categories.

Figure 2.7 Contract type for natural gas by size



Like with electricity, most natural gas consumers (53%) were on a standard variable tariff, with just under a quarter (24%) on a promotional tariff. As with electricity, there is an inconsistency with the proportion of gas consumers reporting that they are on a fixed rate contract and standard variable tariff. Again, this indicates a lack of understanding within the consumer body. The pattern is repeated again with organisations of 1 to 9 employees less likely to be on a promotional tariff than those in the larger size categories (22% compared to 35% for mid-sized and 29% for those with 50 or more employees). Again, those who had switched supplier in the last 5 years were more likely to be on a promotional tariff than those who had not (31% compared to 21%).

Figure 2.8 Tariff type for natural gas by size



A number of those organisations surveyed within the public administration sector enter into energy contracts through a tendering process with suppliers across multiple sites. This is illustrated in the charts provided.

Understanding of the energy market

In this section we explore the views of non-domestic consumers on their understanding of the energy markets. Areas covered are as follows:

- Awareness of minimum standards of customer service;
- Provision of a key contact person or account manager;
- Knowledge of electricity or gas supplier;
- Awareness of choice in the energy market; and
- Views on impact to the energy market of increased competition.

Key findings

- A considerable minority (37%) of non-domestic consumers were unaware of the minimum standards for energy suppliers. However, businesses and organisations showed greater awareness than domestic households. The public administration and community/voluntary sectors showed significantly greater awareness than other business types.
- A fifth (21%) of electricity consumers and a quarter (25%) of natural gas consumers reported that they had been assigned a key contact person. As expected, smaller organisations were much less likely to have been assigned one.
- Knowledge of energy supplier was low amongst the respondent group. Almost two thirds (65%) of electricity consumers reporting having 'little' or 'very little' knowledge of their supplier with 53% of natural gas consumers answering similarly.
- Despite low supplier knowledge, very few non-domestic consumers reported a total lack of awareness of the availability of choice in supplier and tariff type (12% and 17% were 'not at all aware' respectively). Lower levels of awareness were marked for the hospitality, and retail/distribution sectors.
- Despite the intended benefits of competition in the NI energy market, the majority of respondents observed 'no change' in respect of service provided, responsiveness of suppliers and availability of suppliers which suit individual needs (just under 60% in each case). Responses were more positive in relation to the cost of energy and tariff options. Around 30% said there had been an improvement to each aspect. Those in the hospitality sector were the most likely of any sector to observe a negative impact for all characteristics.
- There is a marked difference in several instances between the responses given by those who have recently switched supplier and those who have not done so. Switchers were significantly more likely to report good or some knowledge of their supplier than non-switchers (46% compared to 28% for electricity supplier, and 49% compared to 14% for gas). Those who had switched gas and/or electricity supplier were also significantly more

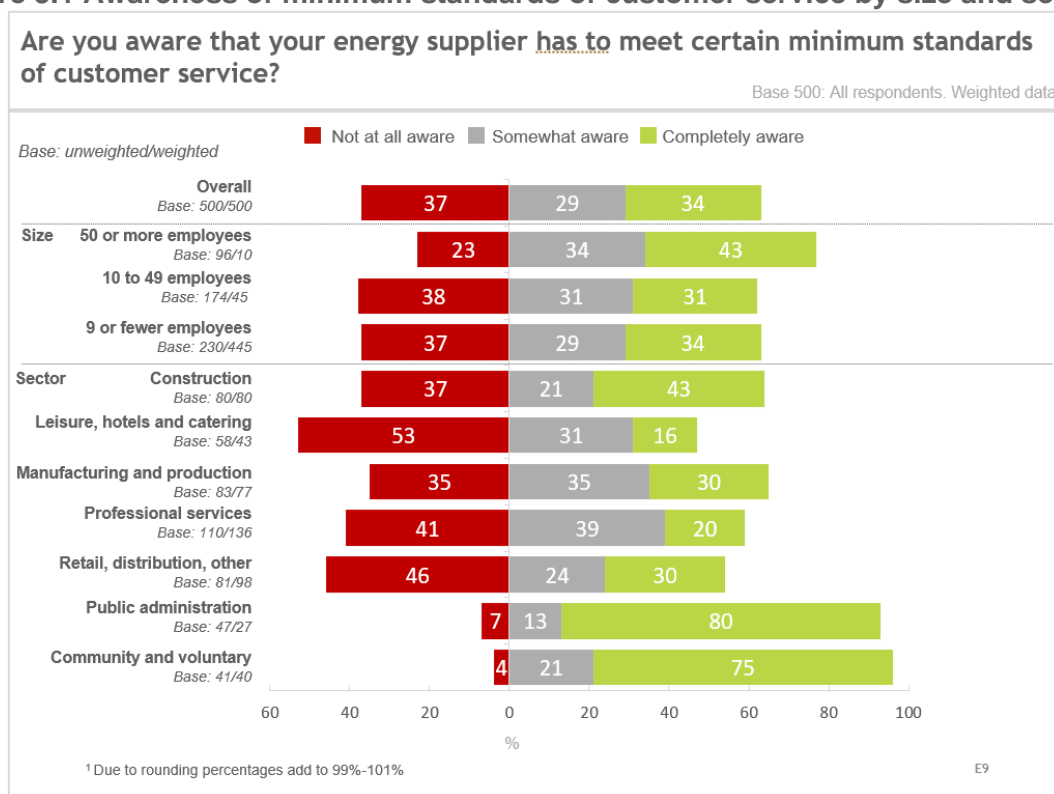
likely than non-switchers to perceive an improvement in service and tariff options with the introduction of increased competition in the energy market. However, they were also significantly more likely to say that the cost of energy had been made worse by competition (19% compared to 12%).

Awareness of minimum standards of customer service

Around a third of respondents (34%) were 'completely aware' that their energy supplier had to meet minimum standards of customer service, with an additional 29% 'somewhat aware'. Over a third (37%) described themselves as 'not at all aware'. Reported levels of awareness were similar for small and mid-sized businesses and organisations, with greater awareness in the largest size group. 63% of those with 1 to 9 employees and 62% of those with 10 to 49 described themselves as either 'somewhat aware' or 'completely aware', compared to 77% of those with 50 or more employees.

There was considerable variation in awareness across sectors. Businesses in the hospitality sector demonstrated the lowest levels of awareness of minimum standards, with over half (53%) saying they were 'not at all aware'. Organisations in the public administration and community/voluntary sectors were least likely to give this response, with only 7% and 4% doing so respectively. This finding is significant at the 95% confidence level. Consumers of both electricity and natural gas were significantly more likely (at the 95% confidence level) to be aware of the minimum standards than those with electricity but not natural gas; 74% were 'somewhat' or 'completely' aware compared to 60% of the other grouping. Those who had recently switched either gas or electricity reported similar levels of awareness of minimum standards to those who had never switched (37% saying they were completely aware compared to 32% of non-switchers).

Figure 3.1 Awareness of minimum standards of customer service by size and sector





There is a slightly higher level of awareness of the existence of minimum standards among non-domestic energy consumers than households. 63% of non-domestic respondents were at least 'somewhat aware' of the standards, compared to 54% of respondents to the domestic consumer insight tracker.

Provision of a key contact person or account manager

Respondents were asked whether they had been provided with a key contact person or account manager by their electricity or gas supplier.

Electricity

One in five (21%) electricity consumers had been given a key contact person or account manager. This increased to just over a third (35%) of businesses in manufacturing/ production, the highest proportion of any sector. As expected, the proportion of organisations and businesses assigned a key contact rose in line with size band (19% for the smallest businesses, rising to 36% and 52% of the mid-sized and largest consumers respectively). Those who had recently switched supplier were significantly more likely (at the 95% confidence level) to have been given a key contact person than those who had not switched (33% compared to 13%).

Figure 3.2 Provision of key contact person/ account manager (electricity supplier) by size and sector

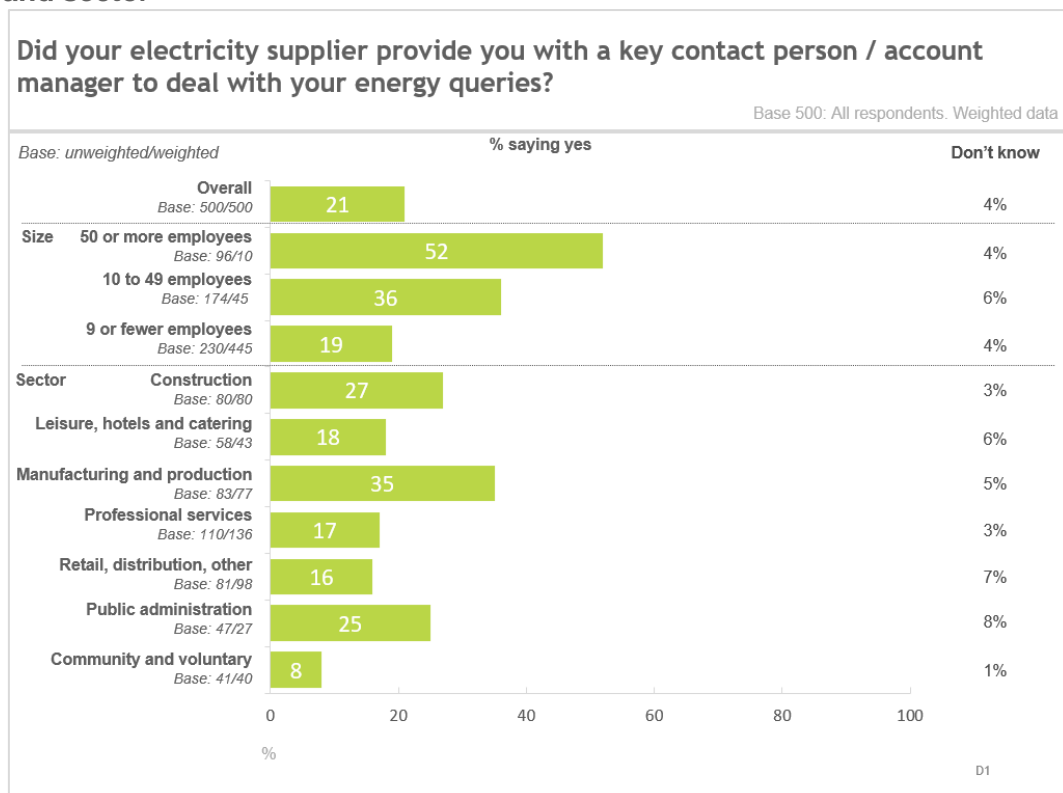
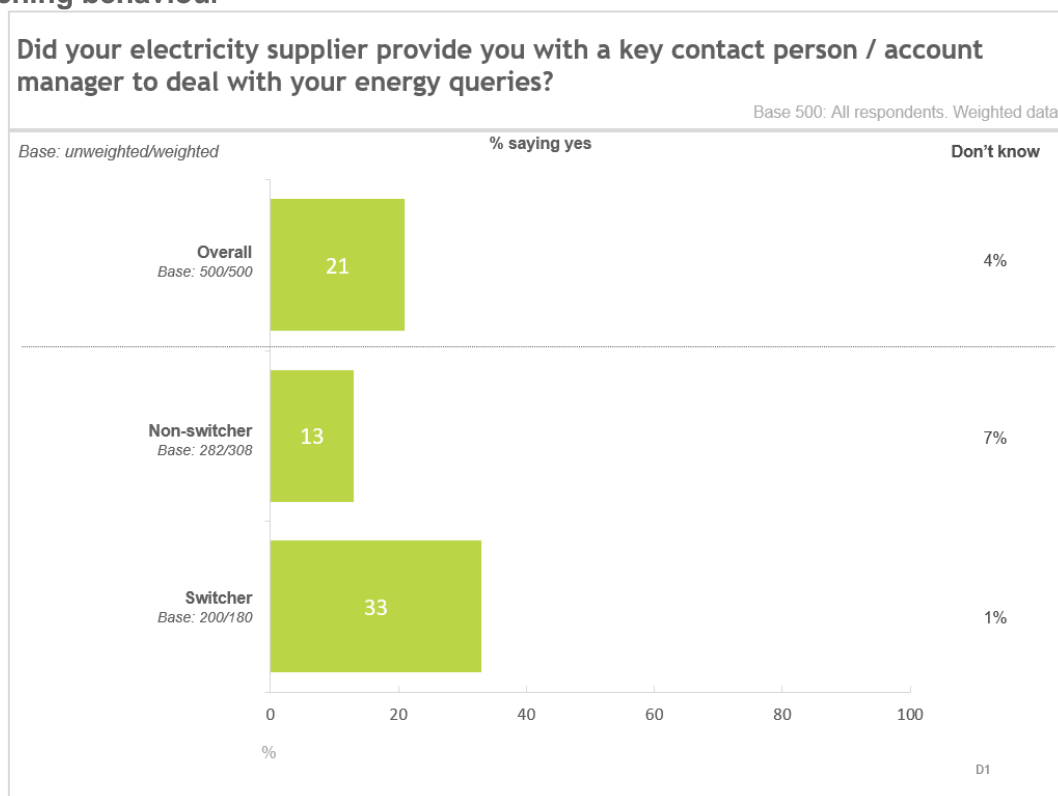


Figure 3.3 Provision of key contact person/account manager (electricity supplier) by switching behaviour



Gas

One quarter (25%) of respondents had been provided with a key contact or account manager by their natural gas supplier. As with electricity, larger organisations and businesses were more likely to have been assigned a key contact than smaller entities; just over a fifth (22%) of those with 1 to 9 employees, compared to 36% of the mid-sized and 51% of the largest category. Again, switchers were significantly more likely to have been provided with a key contact by their gas supplier (49% compared to 14% of non-switchers).

Figure 3.4 Provision of key contact person/ account manager (natural gas supplier) by size

Did your gas supplier provide you with a key contact person / account manager to deal with your energy queries?

Base 149/114: Respondents with natural gas. Weighted data

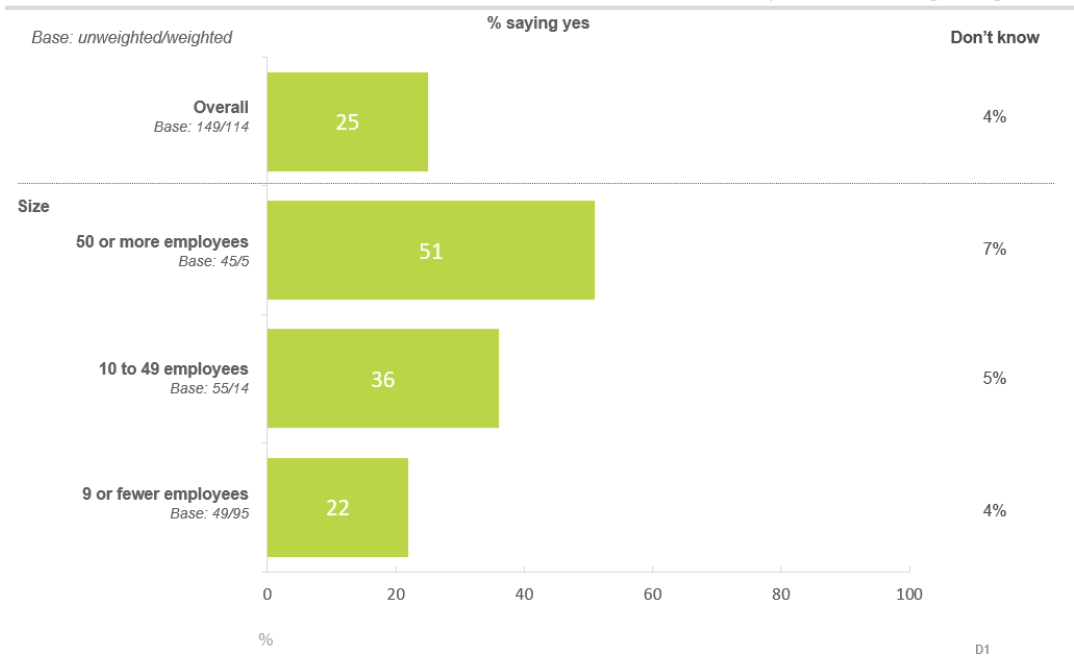
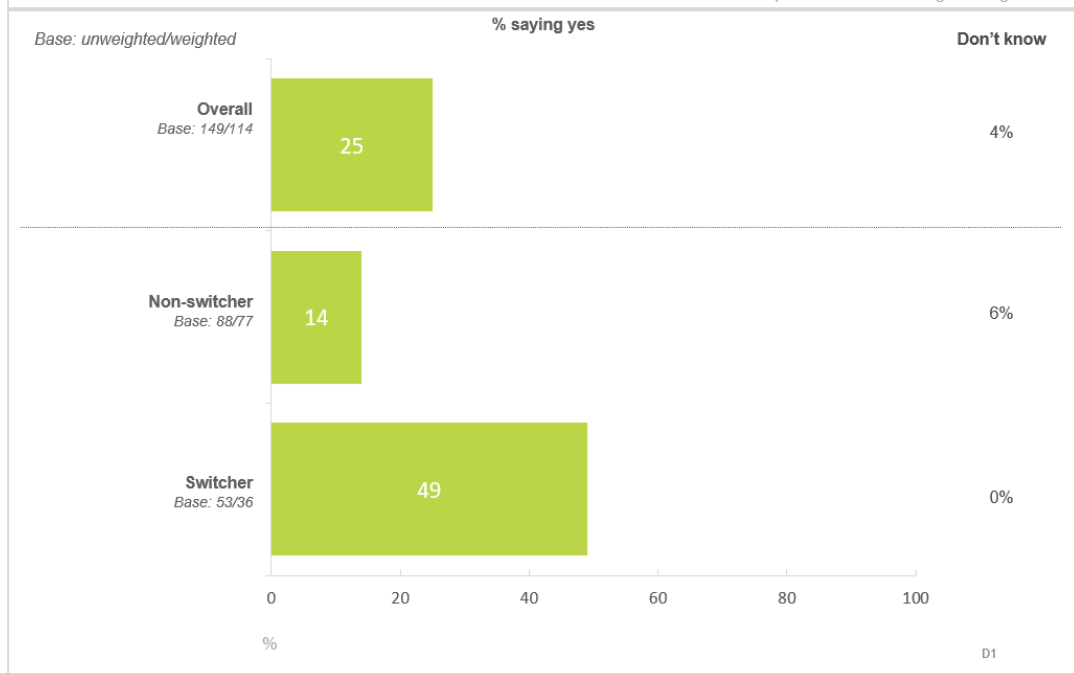


Figure 3.5 Provision of key contact person/account manager (natural gas supplier) by switching behaviour

Did your gas supplier provide you with a key contact person / account manager to deal with your energy queries?

Base 149/114: Respondents with natural gas. Weighted data



Knowledge of electricity or gas supplier

Respondents were asked to describe how well they know their electricity or gas supplier.

Electricity

Almost two thirds (65%) of respondents reported having little or very limited knowledge of their electricity supplier, 23% said they had some knowledge and 11% described their level of knowledge as good. Smaller businesses were more likely to report a lack of knowledge. Over two thirds (68%) of those with 1 to 9 employees said they had little or very little knowledge, compared to 47% of those with 10 to 49 employees, falling further to 38% for the largest group. The retail/distribution sector was most likely to report little or very limited knowledge at over 75%, with the community/voluntary sector following at 70%. Those who had recently switched were significantly more likely (at the 95% confidence level) to report having good or some knowledge of their electricity supplier than those who had never switched (46% compared to 28%).

Figure 3.6 Knowledge of electricity supplier by size and sector

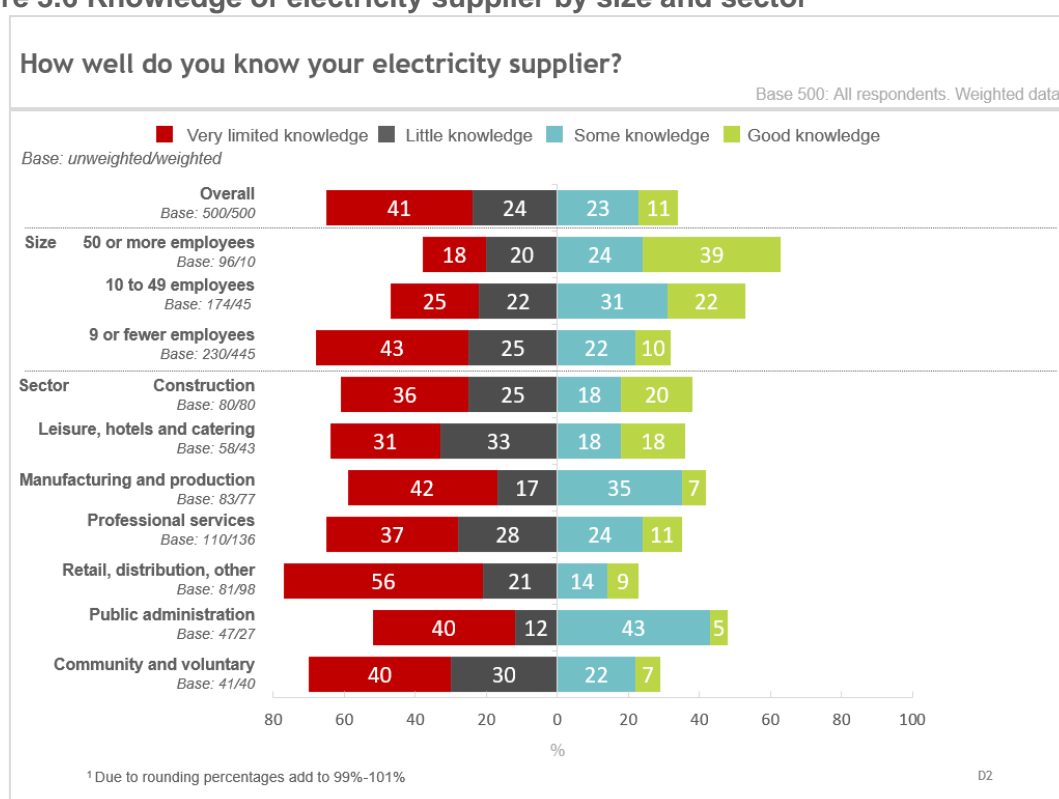
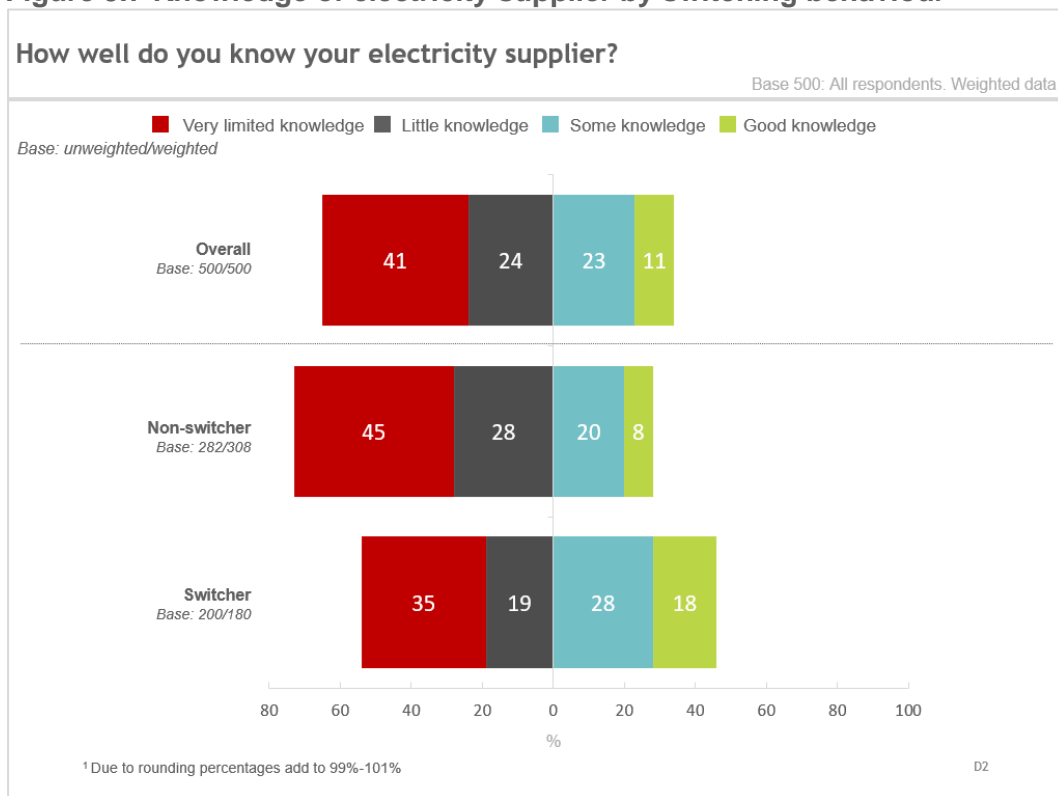


Figure 3.7 Knowledge of electricity supplier by switching behaviour



Gas

Over half (53%) of those with natural gas reported little or very limited knowledge of their supplier, 28% said they had some knowledge and one in five (20%) had good knowledge. There was greater consistency across size bands for gas than electricity in relation to reported knowledge. 53% of those in the smallest category recorded little or very limited knowledge, with 49% and 47% of those in the mid-sized and largest groups doing so respectively. However, organisations with 50 or more employees were still much more likely to report the highest level of knowledge than those in the other size ranges. Again, switchers reported a much better knowledge of their supplier than those who had never switched (64% said they had good or some knowledge compared to 41%). This result is statistically significant at the 95% confidence level.

Figure 3.8 Knowledge of gas supplier by size

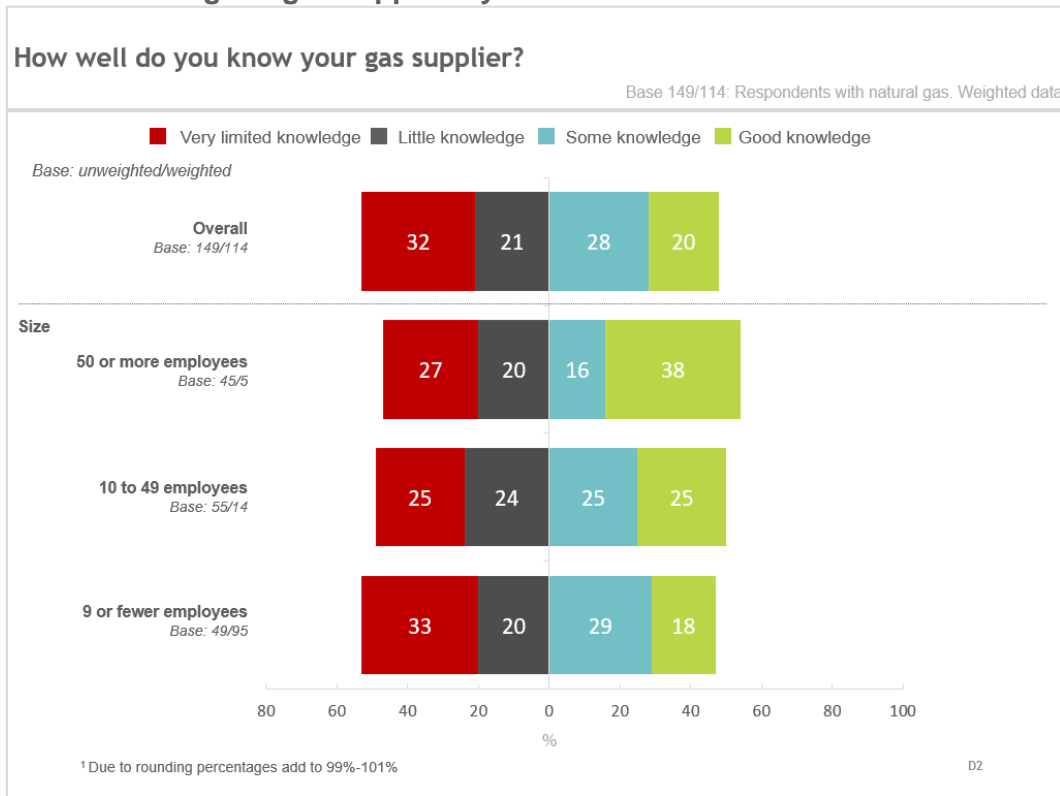
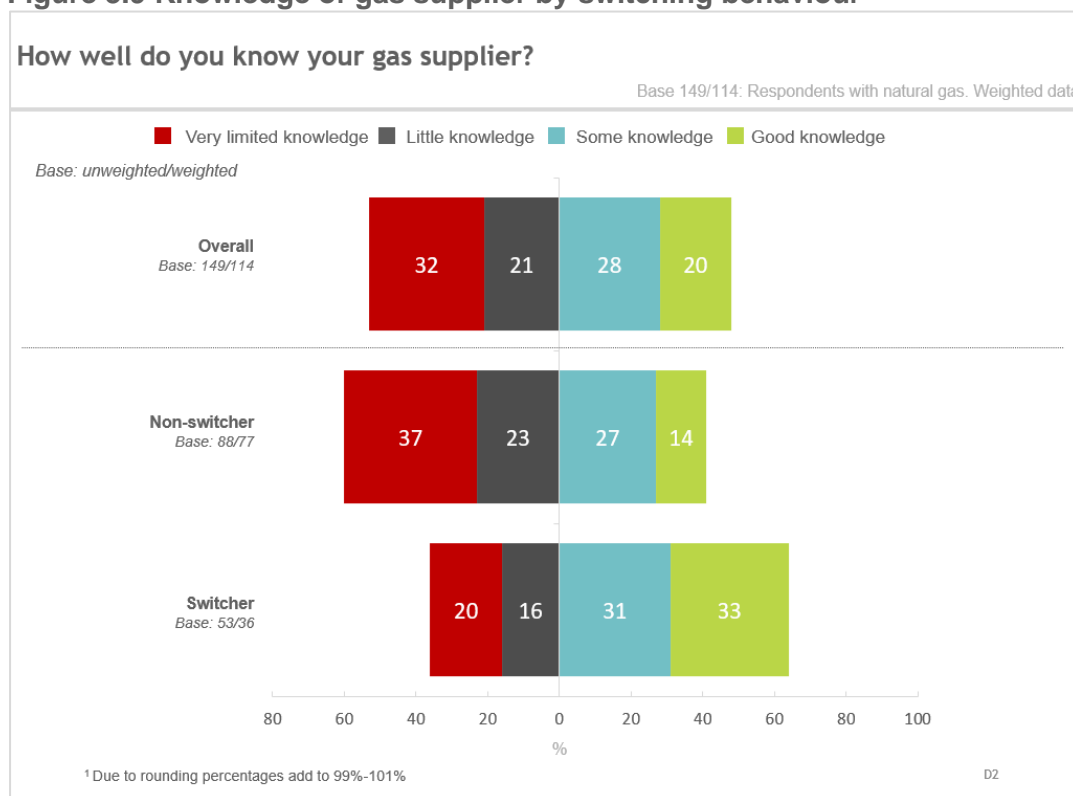


Figure 3.9 Knowledge of gas supplier by switching behaviour



Awareness of choice in the energy market

Respondents were asked to what extent they are aware of two aspects of the energy market:

- Ability to choose between multiple energy suppliers; and
- Ability to choose between several tariff types.

58% of respondents said they were ‘completely aware’ that their business or organisation could choose between multiple energy suppliers, 30% said they were ‘somewhat aware’ and 12% said they were ‘not at all aware’. As previously, levels of awareness varied according to business size. Those with 1 to 9 employees demonstrated the least awareness with 12% saying they were ‘not at all aware’, compared to 9% of those with 10 to 49 employees and 2% of those in the 50 employees or more grouping. There was some variation across sectors with those in hospitality and the retail/distribution sectors most likely to say they were ‘not at all aware’ of the choice at 20% and 21% respectively. Respondents who had switched gas and/or electricity were significantly more likely (at the 95% confidence level) to say that they were ‘completely aware’ of having a choice of suppliers than those who had never switched energy supplier (71% compared to 52%).

Figure 3.10 Awareness of choice between multiple energy suppliers by size and sector

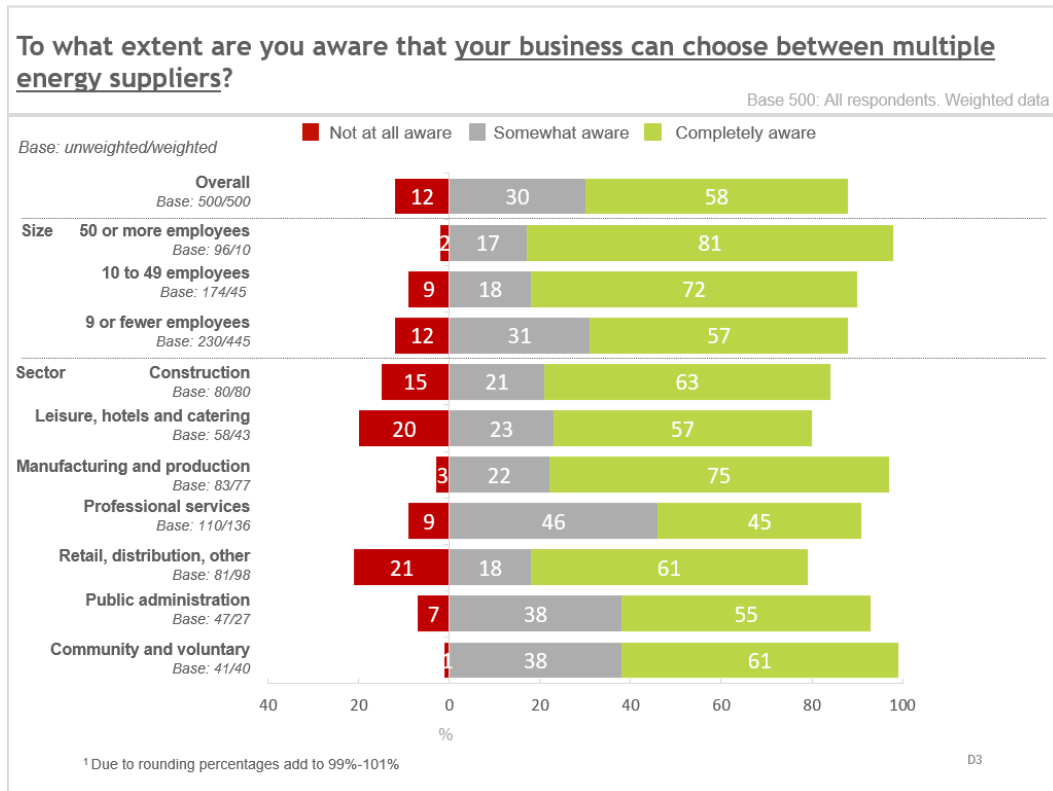
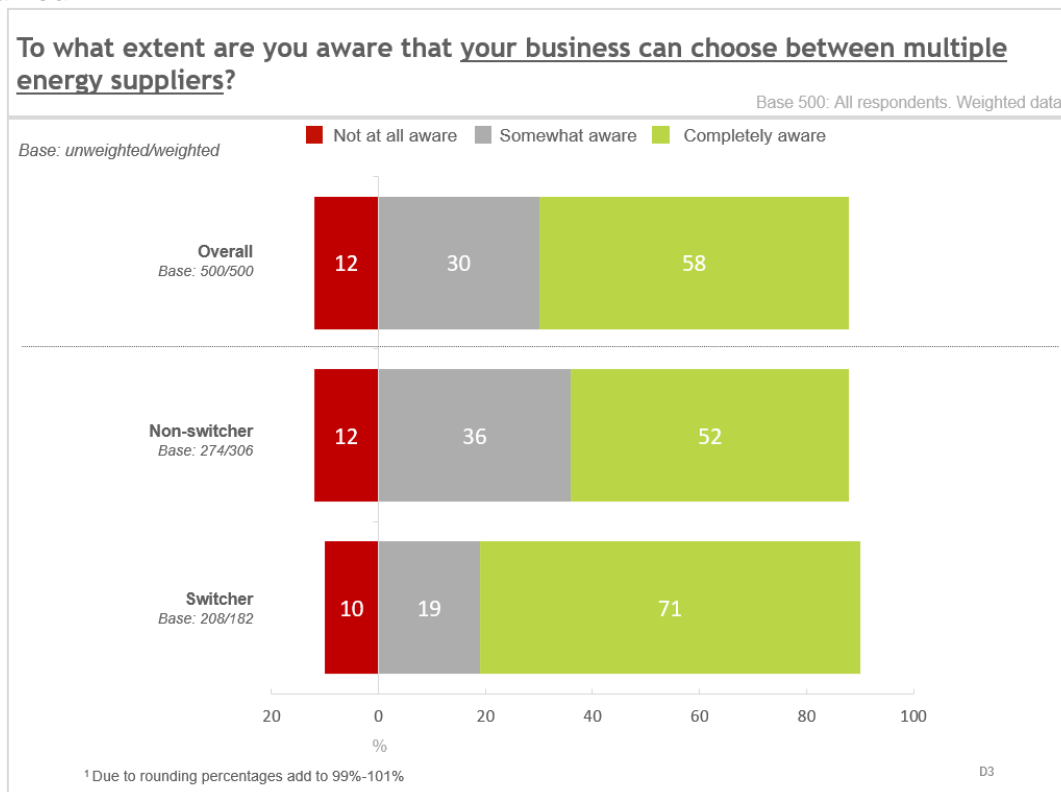


Figure 3.11 Awareness of choice between multiple energy suppliers by switching behaviour



Responses were similar in relation to awareness of alternative tariff types. Just over half (53%) said they were 'completely aware' that their business or organisation could choose between tariff types, 30% were 'somewhat aware' and 17% were 'not at all aware.' Once again, larger businesses and organisations reported higher levels of awareness than those in the smaller groupings. In this instance, the construction, hospitality, and retail/distribution sectors showed similarly low awareness levels when compared to the other sectors, with 23%, 29% and 21% 'not at all aware' for each sector respectively. Again, switchers were significantly more likely (at the 95% confidence level) to report complete awareness of the choice of tariffs (67% compared to 46% of non-switchers).

Figure 3.12 Awareness of choice between tariff types by size and sector

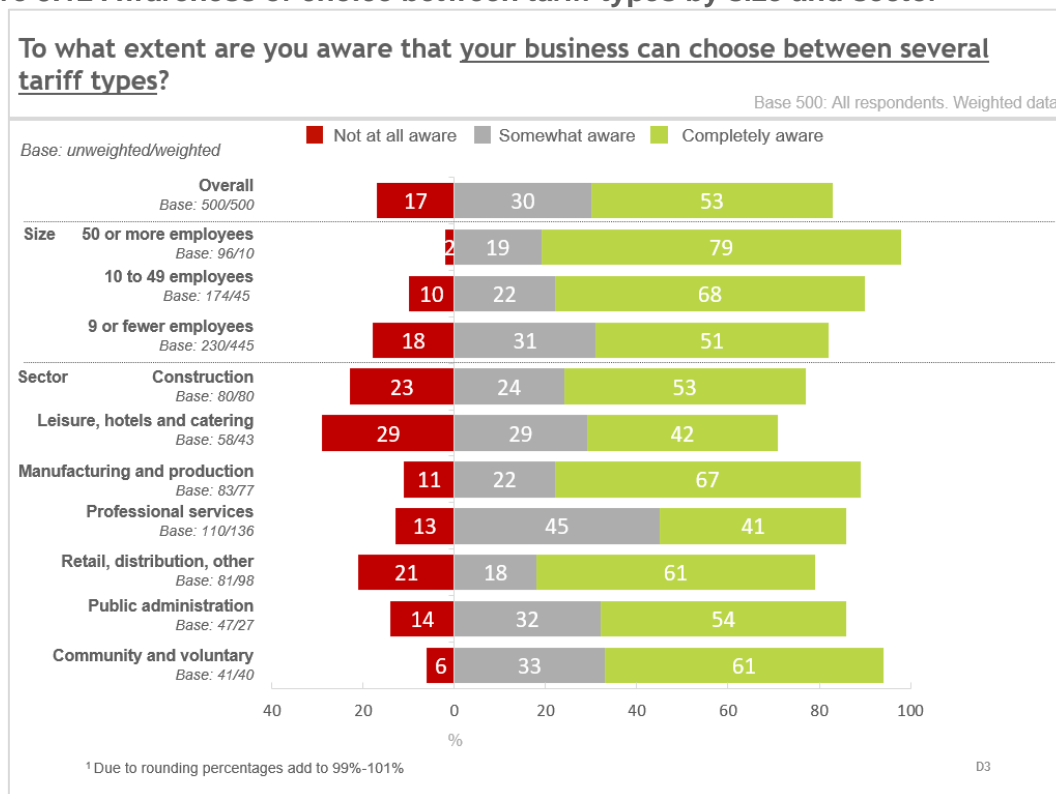
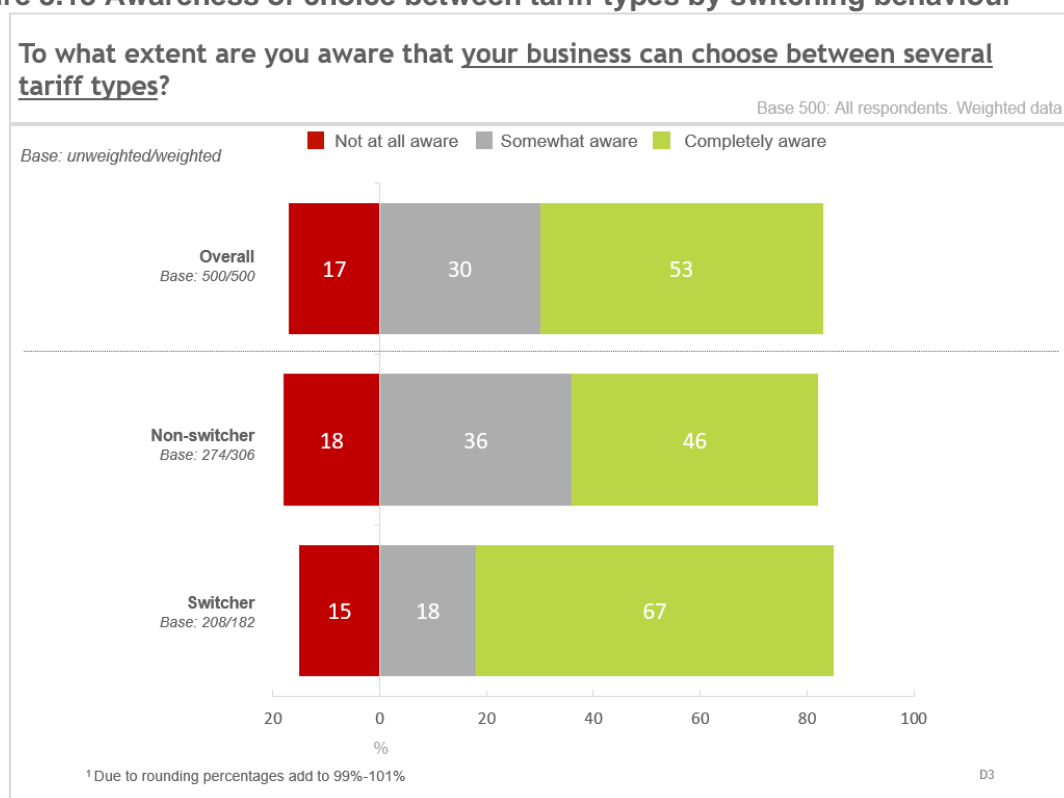


Figure 3.13 Awareness of choice between tariff types by switching behaviour



Views on impact to the energy market of increased competition

Respondents were asked whether the following aspects of the energy market had 'improved,' 'not changed,' or 'been made worse' by an increased choice of electricity and gas suppliers in NI:

- Service provided;
- Responsiveness of suppliers to customer needs;
- Availability of suppliers which suit individual business needs;
- Cost of energy; and
- Tariff options available.

At the overall level, responses were similar in relation to the impact on; service provided, responsiveness of suppliers and availability of suppliers which suit individual needs. In each case, just under 60% had reported 'no change' since the increase in choice of electricity and gas suppliers, 21%, 17% and 15% said there had been an improvement to each aspect respectively, while about 5% thought the situation had 'been made worse'. It is interesting that the majority of respondents recorded 'no change' in these market characteristics, suggesting the intended advantages of increased competition have not transformed the consumer experience. Those who had switched energy supplier recently and those who had never switched reported similar views in relation to responsiveness and availability of suppliers to suit individual business needs, however switchers were significantly more likely (at the 95% confidence level) than non-switchers to report an improvement in service provided (25% compared to 17%).

Figure 3.14 Impact on service of increased competition in energy market by size and sector

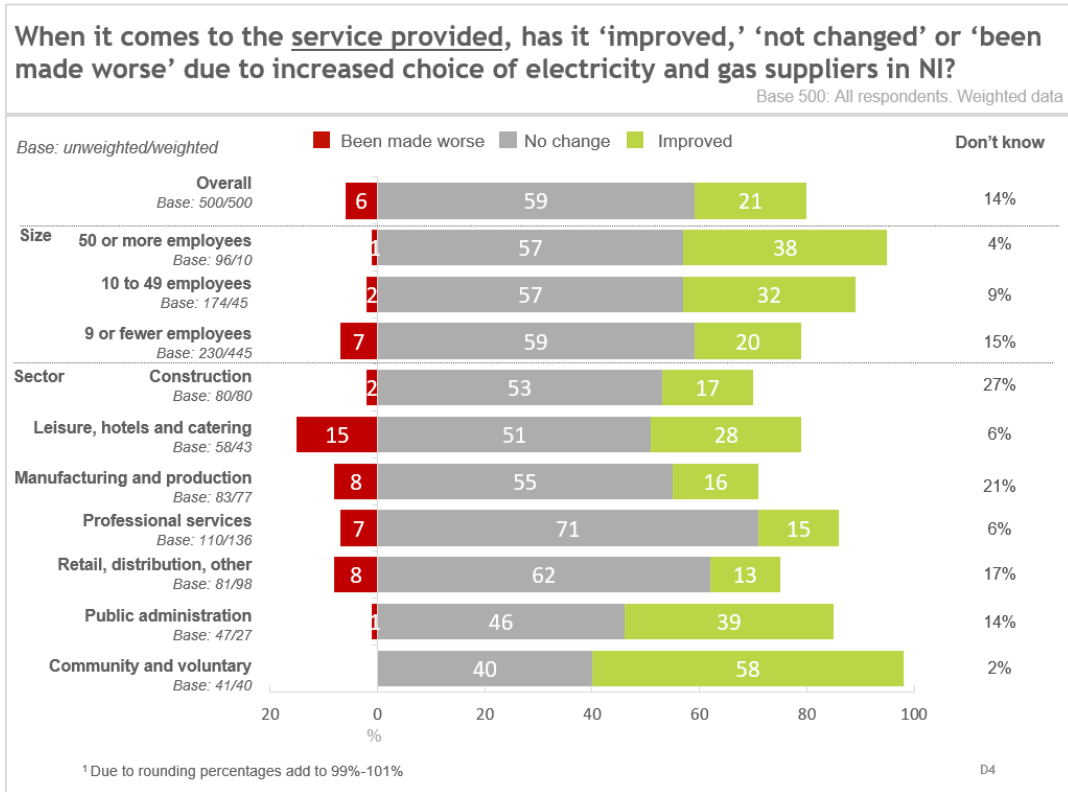


Figure 3.15 Impact on service of increased competition in energy market by switching behaviour

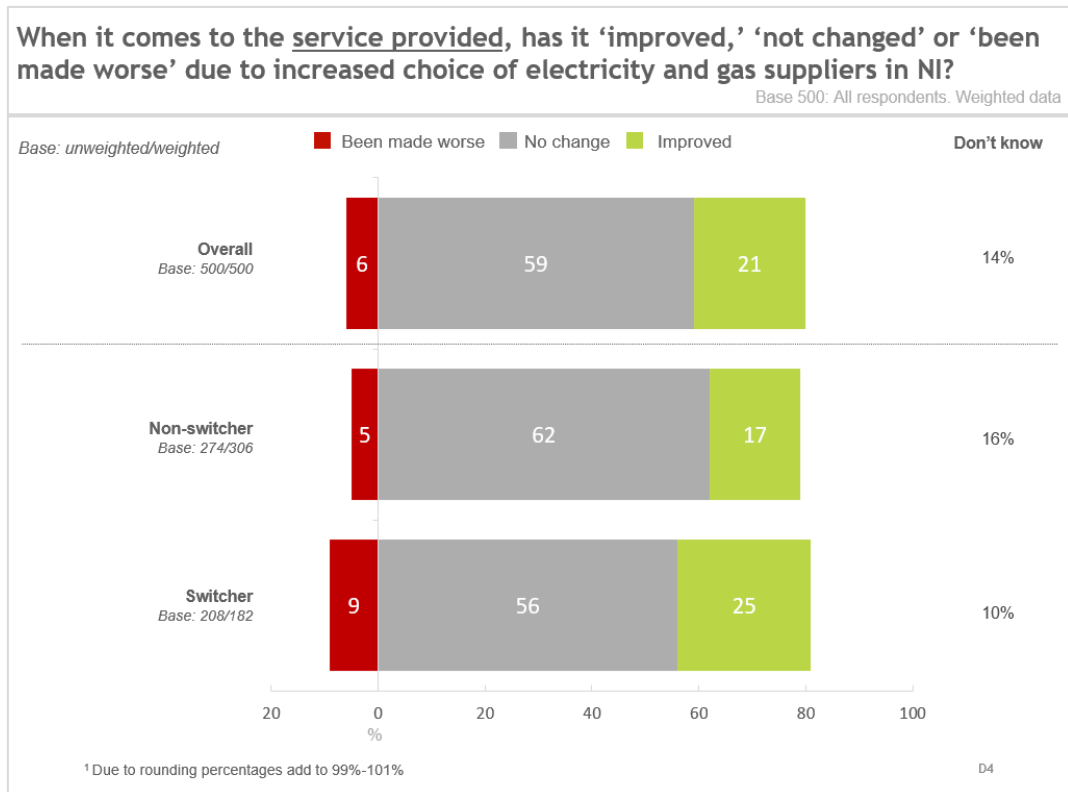


Figure 3.16 Impact on responsiveness of suppliers of increased competition in energy market by size and sector

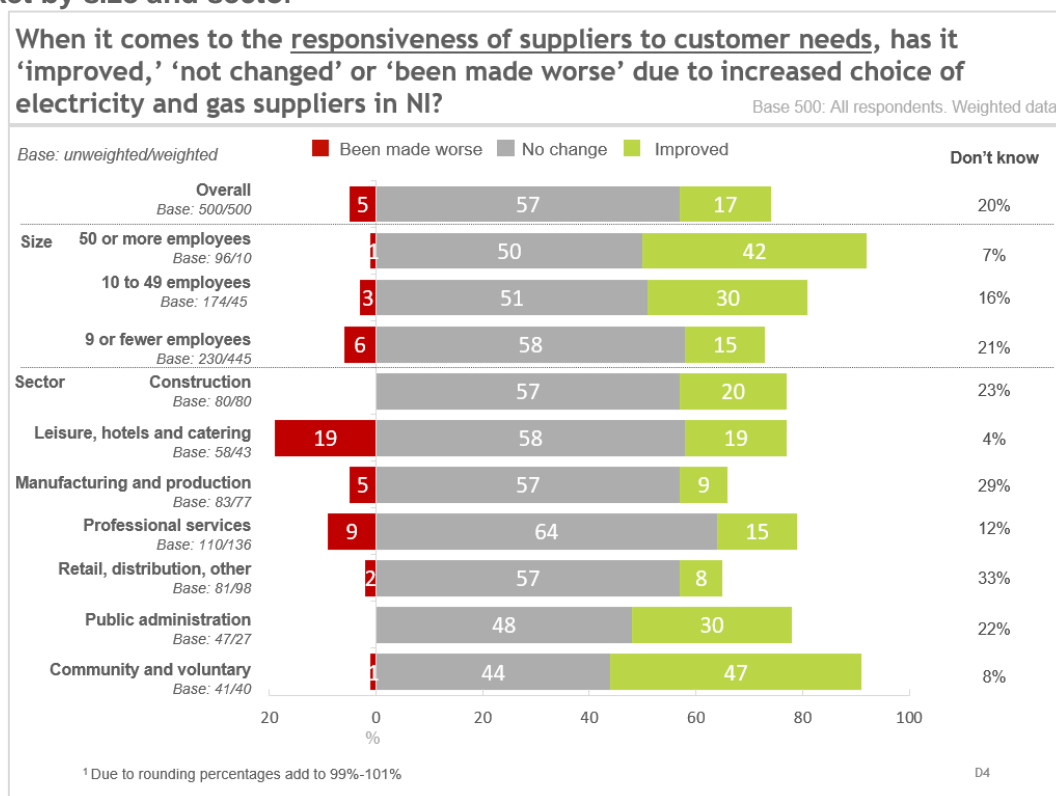
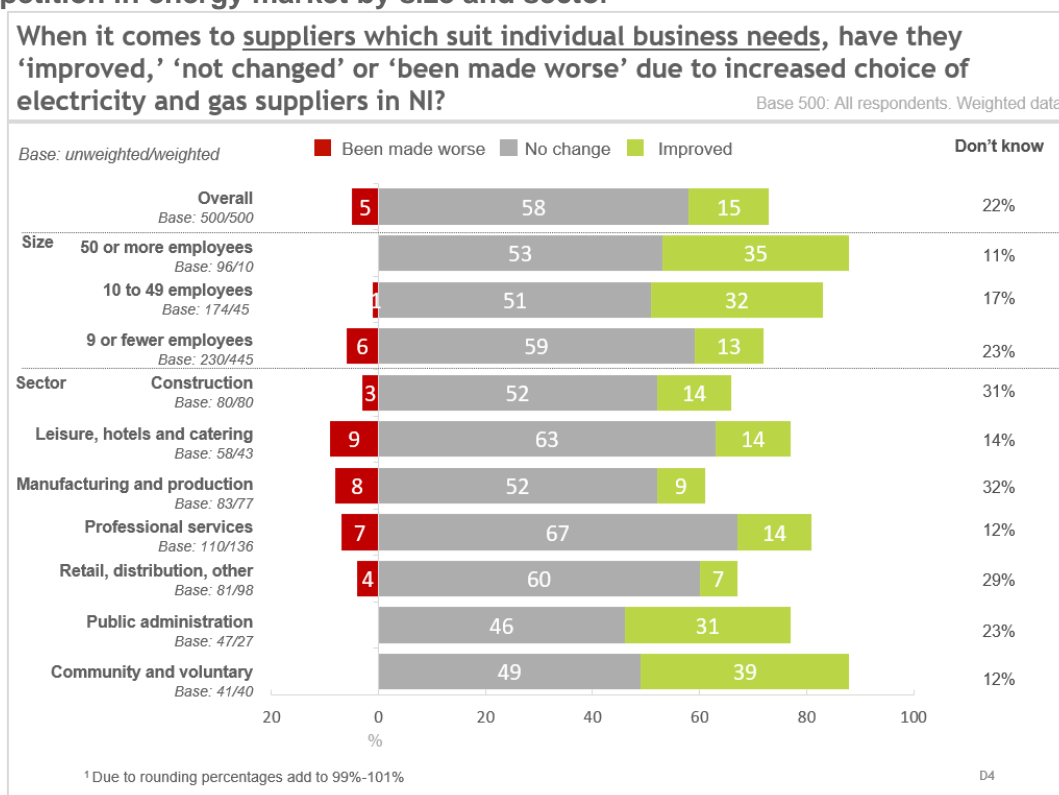


Figure 3.17 Impact on availability of suppliers to suit business needs of increased competition in energy market by size and sector



The response varied somewhat in relation to the cost of energy, with greater polarisation in the answers given. 37% saw no change, just under a third (32%) said things had improved and 14% said the cost had 'been made worse'. While the hospitality sector held a more

negative view towards all aspects, it was in relation to energy costs that the distinction was most marked. 34% of these businesses said cost has 'been made worse' with those in retail/distribution the next most likely sector to hold this view at 15%. This finding is significant at the 95% confidence level. Interestingly, those who had recently switched supplier were significantly more likely (at the 95% confidence level) to say that cost had been made worse by increased competition than non-switchers (19% compared to 12%).

Figure 3.18 Impact on cost of energy of increased competition in energy market by size and sector

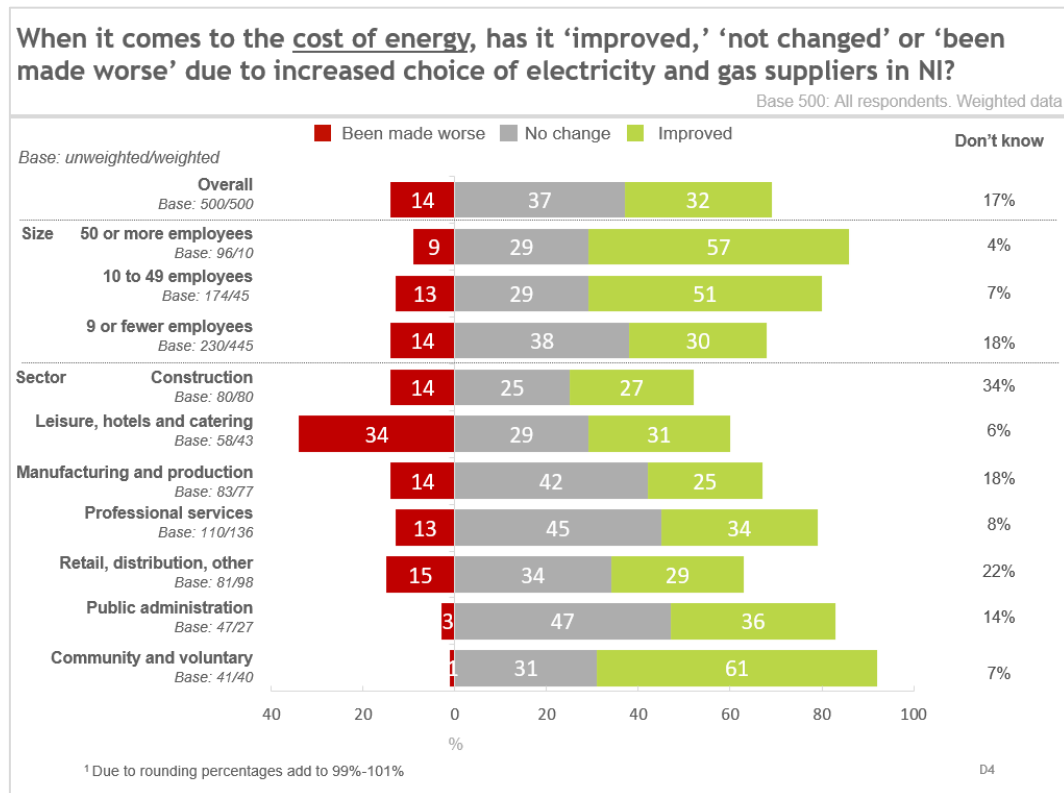
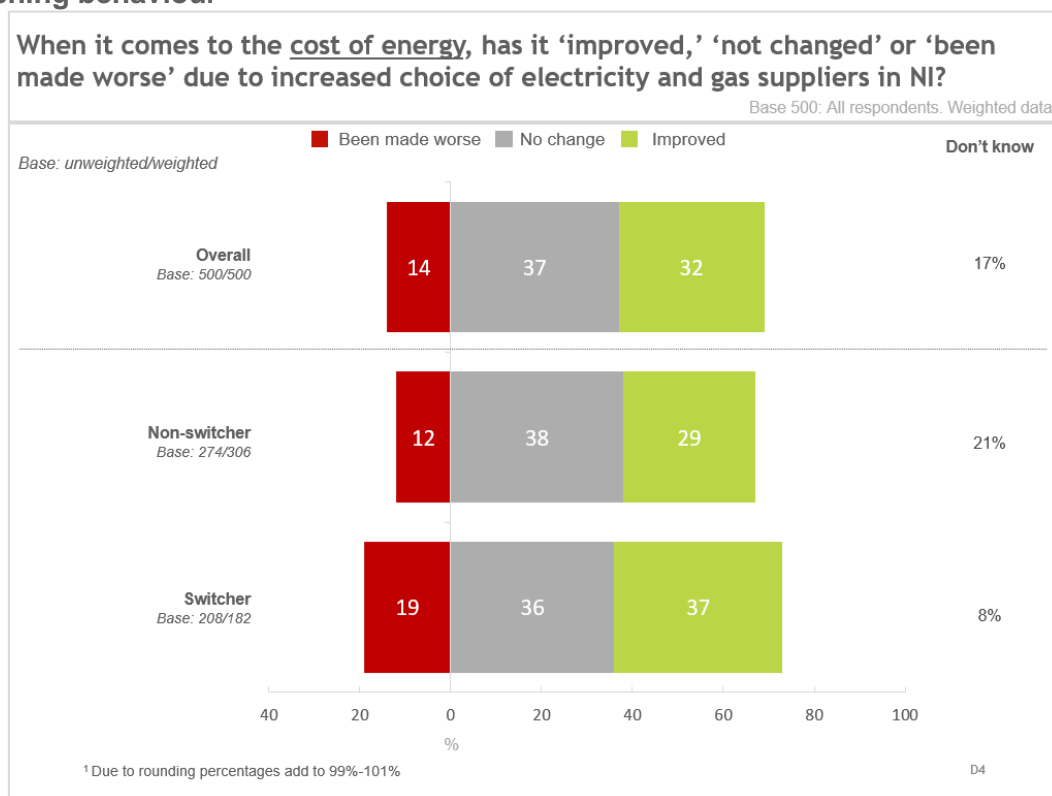


Figure 3.19 Impact on cost of energy of increased competition in energy market by switching behaviour



In response to the impact on tariff options available, 45% said there had been no change, 30% had seen an improvement, and 6% thought the options had 'been made worse.' Those who had recently switched energy supplier were significantly more likely than non-switchers (at the 95% confidence level) to report an improvement in tariff options (36% compared to 26%).

Figure 3.20 Impact on tariff options of increased competition in energy market by size and sector

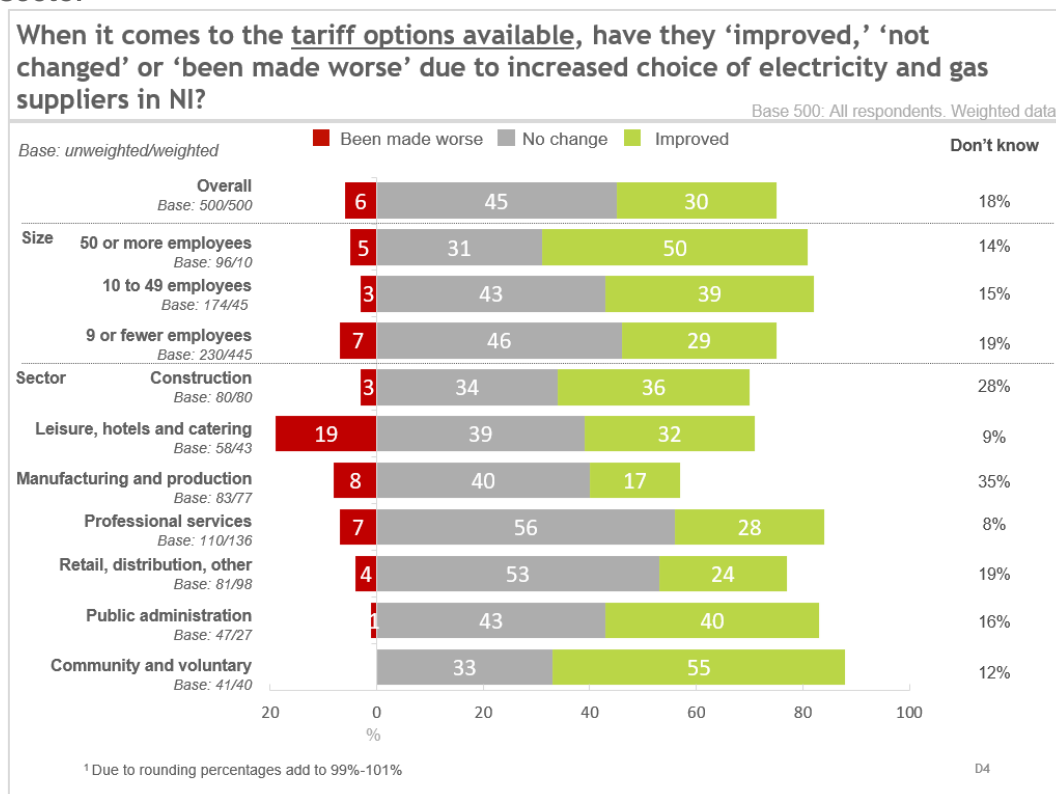
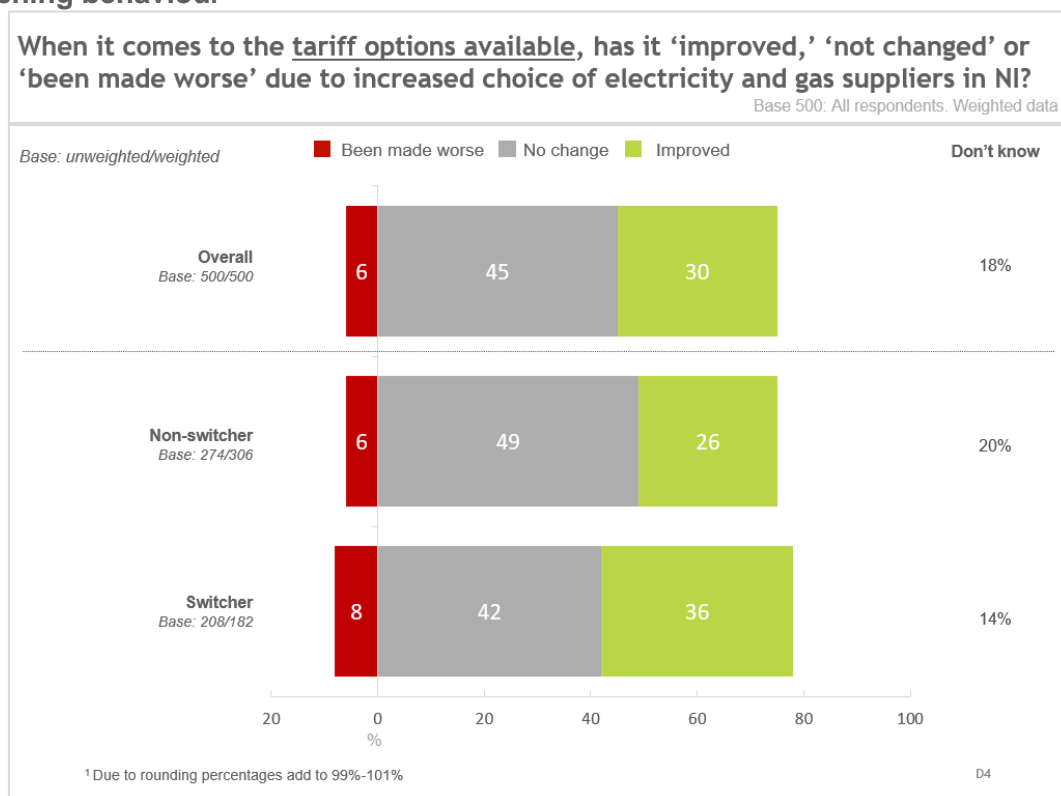


Figure 3.21 Impact on tariff options of increased competition in energy market by switching behaviour



Across all areas, larger companies were most likely to report an improvement since the increased choice of gas and electricity suppliers. Those with 1 to 9 employees were significantly less likely (at the 95% confidence level) than mid-sized or large businesses to report an improvement in relation to supplier choice and responsiveness. Those in the community/voluntary sector had a markedly more positive perspective in all instances than those in other sectors. When comparing respondents with both electricity and natural gas to those with electricity only, the former was significantly more likely (at the 95% confidence level) to report an improvement on all measures.



While the responses of non-domestic consumers mirror those of domestic consumers in respect of supplier choice, supplier responsiveness and service provided, non-domestic consumers were more likely to have observed advantages to competition in relation to the cost of energy and tariff options available. 32% reported an improvement in cost compared to 11% of domestic consumers, and 30% compared to 18% for tariff choice.

Switching

In this section we explore the views of organisations in relation to the following:

- Comparing energy deals;
- Incidence of switching supplier;
- Reasons for not switching;
- Reasons for switching;
- Experience of switching; and
- Likelihood of switching in the future.

Key findings

- There were mixed views on the ease with which non-domestic consumers can compare energy deals, with around 30% of both electricity and gas consumers rating it as 'easy'. However, those who had switched supplier recently, were significantly more likely to describe switching as easy than those who had never done so (36% compared to 25% for electricity; and 44% compared to 26% for gas).
- The low overall numbers rating switching as 'easy' may correspond with the low level of awareness of the Consumer Council's energy price comparison tool (just one quarter (25%) of respondents knew about it and 9% had used it).
- Respondents were unlikely to have switched either electricity or gas supplier in the last five years; 62% and 67% had not done so respectively. Non-domestic electricity consumers were much less likely to have switched than their domestic counterparts, however switching rates were similar for natural gas customers.
- The majority of electricity and natural gas consumers are choosing not to switch as they are happy with their current service (68% and 71% respectively) rather than for any other reason. It should be noted that some natural gas consumers do not have a choice of supplier due to the immaturity of the natural gas network outside the Greater Belfast and Larne areas.
- There are two main drivers for switching energy supplier; (i) reacting to a promotional offer by a supplier (45% and 53% of electricity and natural gas switchers respectively) and (ii) reacting to the feeling that the business is paying too much (40% of both groups). This mirrors the findings of the domestic consumer insight tracker.
- There was no one dominant mode of switching for non-domestic consumers: 36% of electricity switchers and 37% of gas switchers had used a broker, 29% and 26% respectively by telephone and 21% and 24% respectively via the internet. However, the experience of switching in respect of price/value for money, ease of switching and quality of service, was overwhelmingly positive for all switchers. The survey results suggest that non-domestic consumers have a better overall switching experience than household switchers.

- Few electricity or natural gas consumers intended to switch over the next 12 months (16% and 17% respectively), however those who have switched recently are significantly more likely to do so again in the next 12 months than those who have never switched.

Comparing energy deals

There are mixed views as to how easy or difficult it is for businesses and organisations to compare energy deals. While 30% of electricity customers rated it as easy, 27% considered it to be difficult, and 12% were unsure. Those in urban areas were significantly more likely (at the 95% confidence level) than those located rurally to find comparing easy (34% compared to 23%). Those who had recently switched electricity supplier were significantly more likely (at the 95% confidence level) than those who had not switched at all to find comparing deals easy (36% compared to 25%).

The corresponding figures for gas customers were similar, with 31% considering the comparison of deals to be easy and 28% rating it as difficult. Again those who had recently switched gas supplier, were significantly more likely (at the 95% confidence level) than those who had not switched to find comparing deals easy (44% compared to 26%).

Figure 4.1 Ease of comparing deals for electricity/ natural gas by size and sector

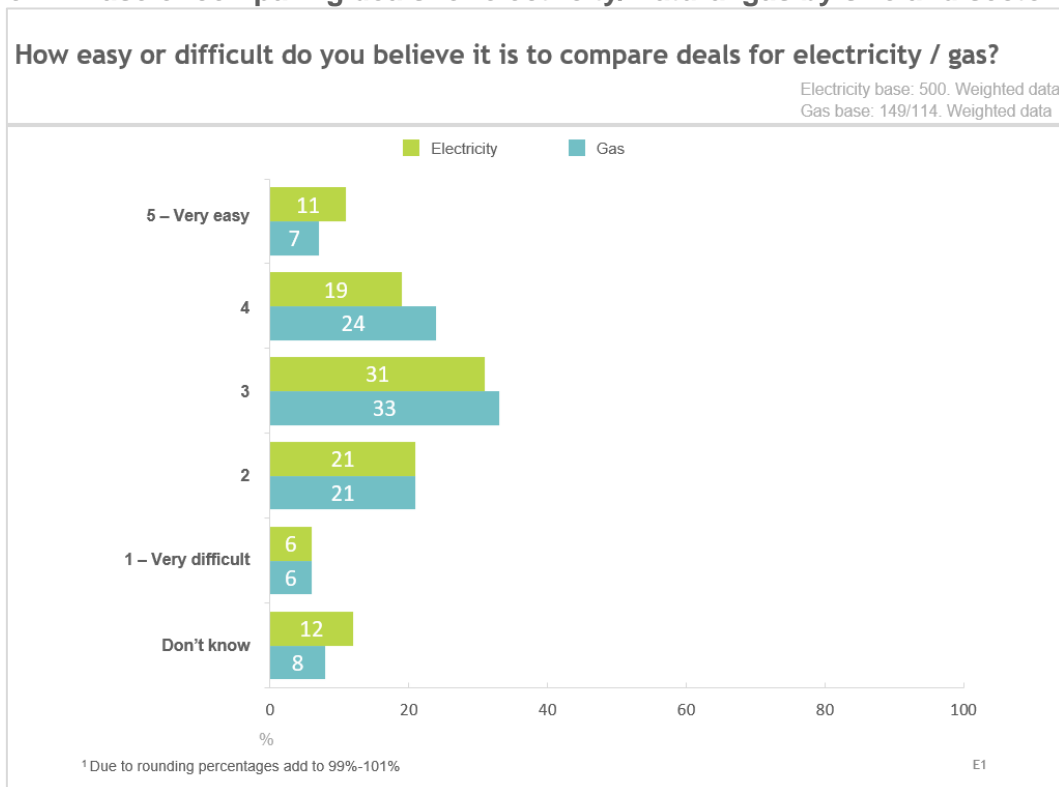


Figure 4.2 Ease of comparing deals for electricity by switching behaviour

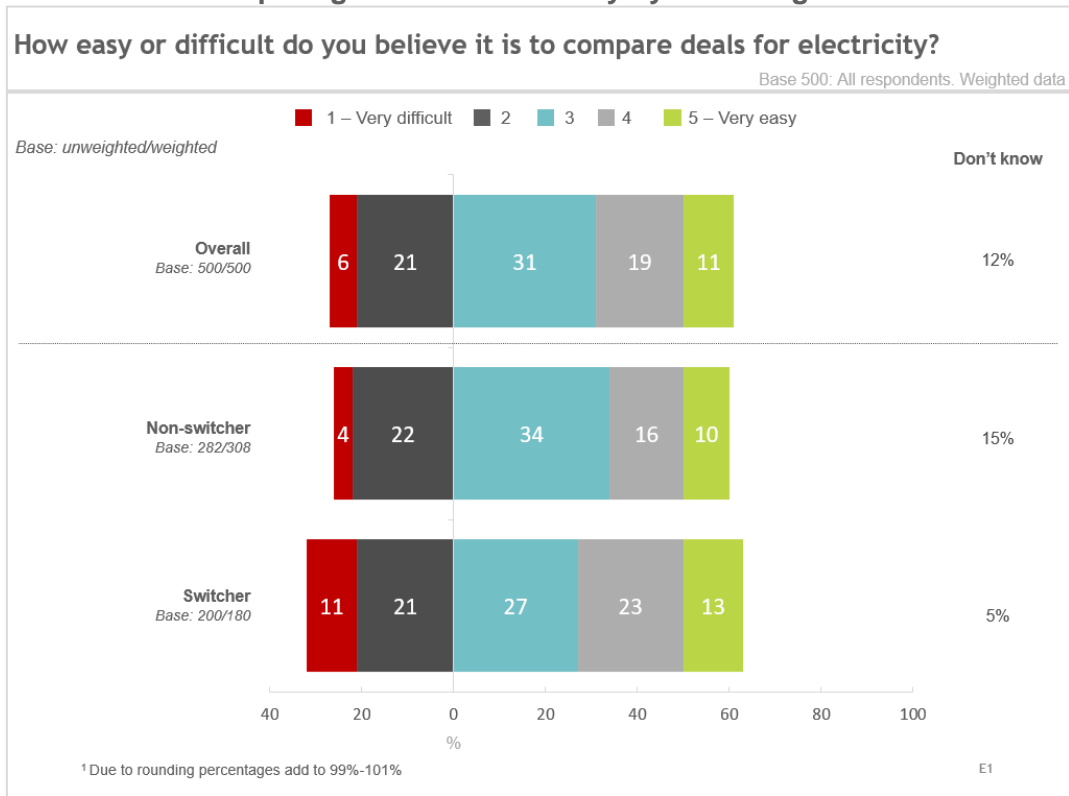
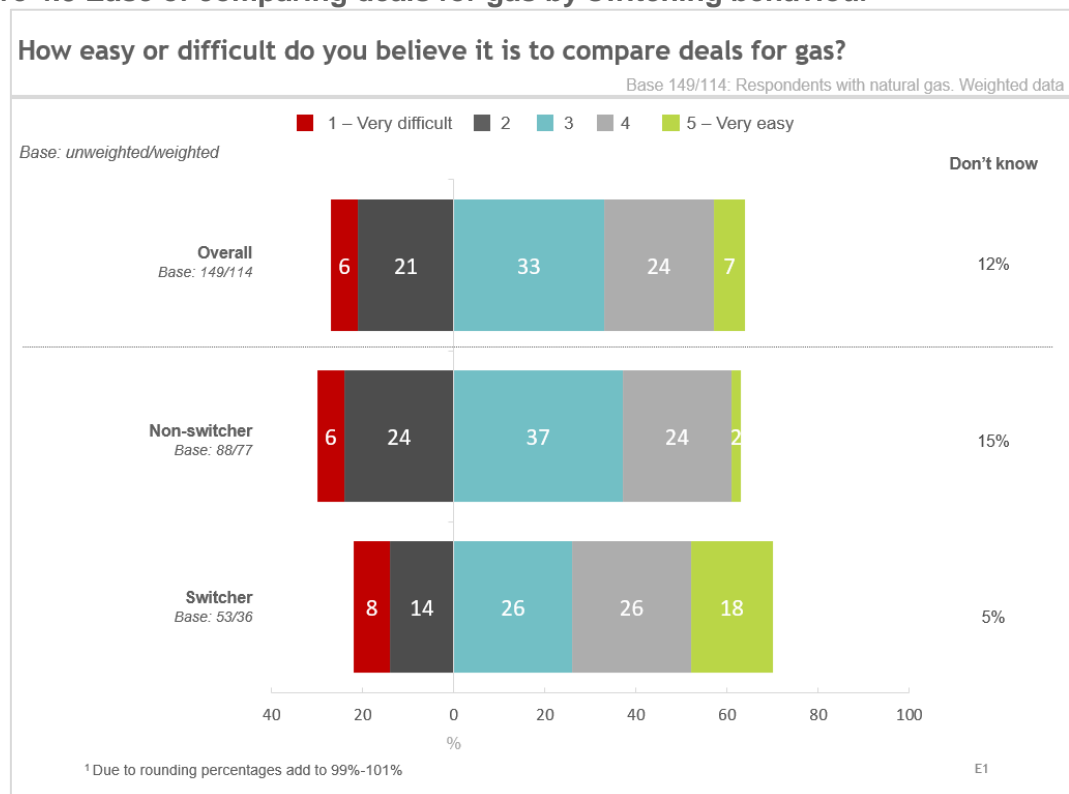
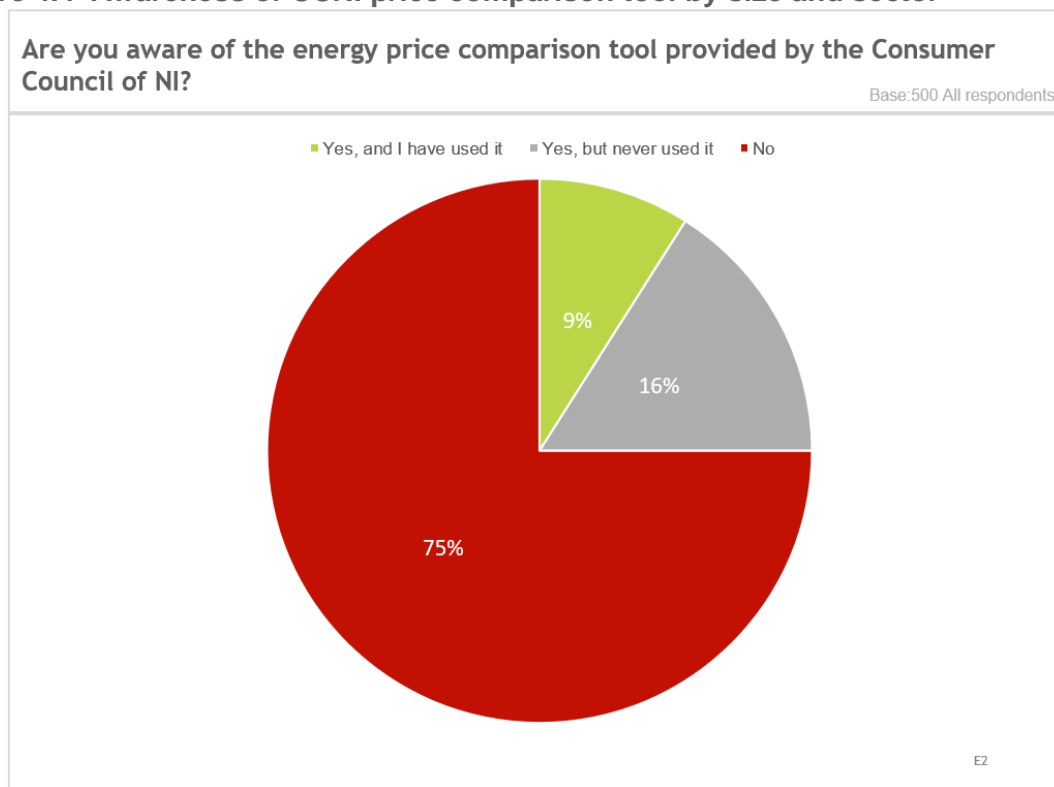


Figure 4.3 Ease of comparing deals for gas by switching behaviour



The Consumer Council in Northern Ireland provides an energy price comparison tool for use by non-domestic customers. However just one quarter of business and organisations were aware of it (25%) and 9% had used it. Consumers with both electricity and natural gas were significantly more likely (at the 95% confidence level) to have used the tool than those with electricity only (15% compared to 7%).

Figure 4.4 Awareness of CCNI price comparison tool by size and sector



Domestic consumers were more likely to be aware of the equivalent Consumer Council tool for households (36% were aware of it with 13% having used it.)

Incidence of switching supplier

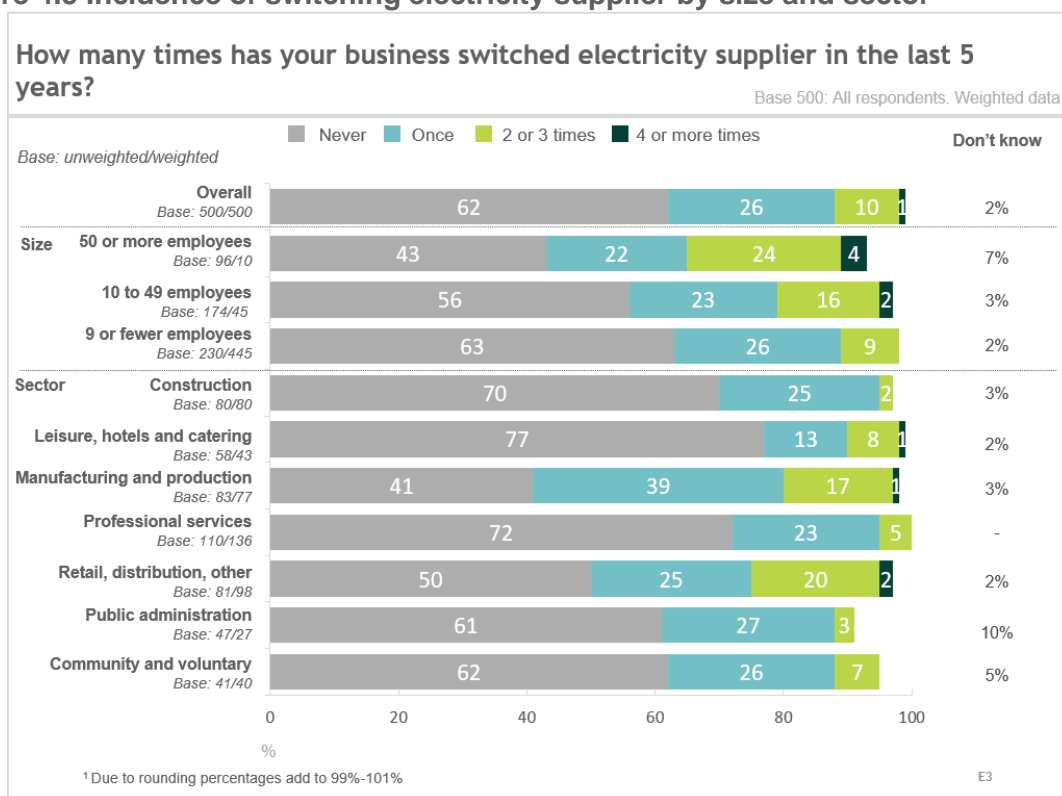
Respondents were asked to outline how many times, if at all, they had switched energy supplier in the last five years.

Electricity

The majority of businesses and organisations (62%) have not switched electricity supplier in the last five years. One quarter have switched once over this time period and 11% have switched more than once.

Larger businesses and those operating in manufacturing/production, and retail/ distribution, are more likely to have switched supplier.

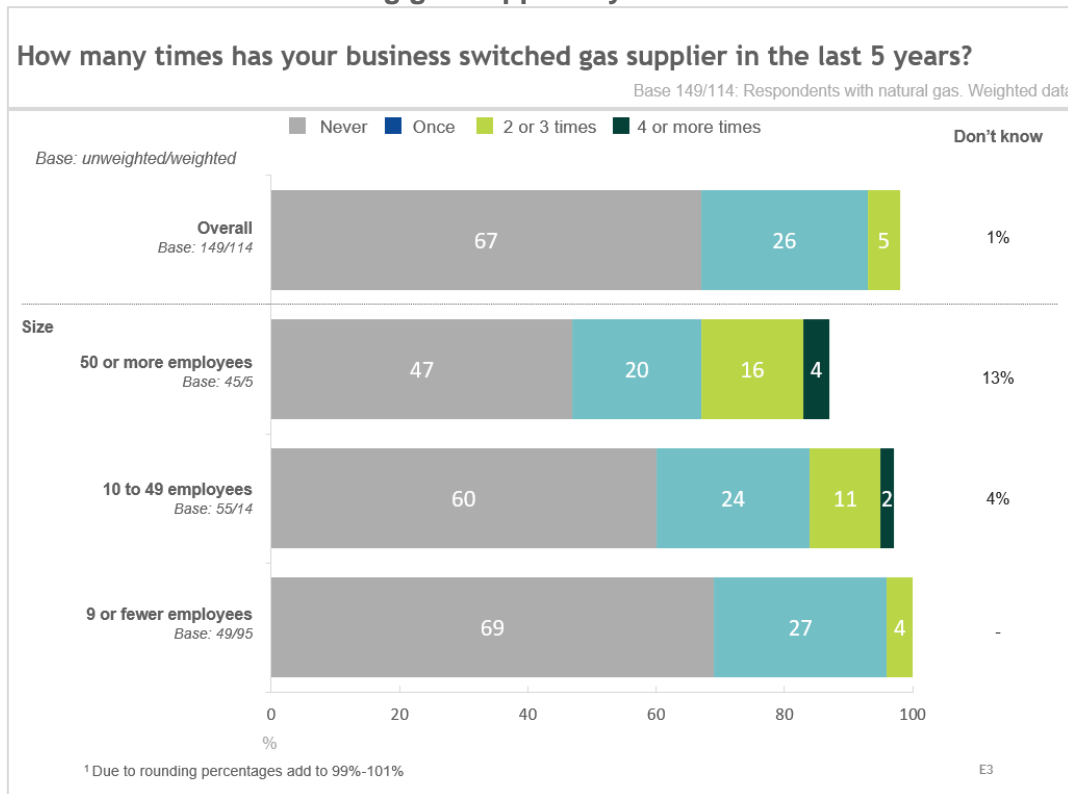
Figure 4.5 Incidence of switching electricity supplier by size and sector



Gas

Two thirds of businesses and organisations with natural gas (67%) have not switched supplier in the last five years. Similar to electricity customers, larger businesses are more likely to have switched supplier. It should be noted that not all natural gas consumers in Northern Ireland have a choice of supplier, given the relative immaturity of the network outside the Greater Belfast and Larne areas.

Figure 4.6 Incidence of switching gas supplier by size



This question was asked differently in the domestic consumer insight tracker, with respondents to that survey asked if they had ever switched with no timeframe specified. However, it is still helpful to compare responses from the two groups.

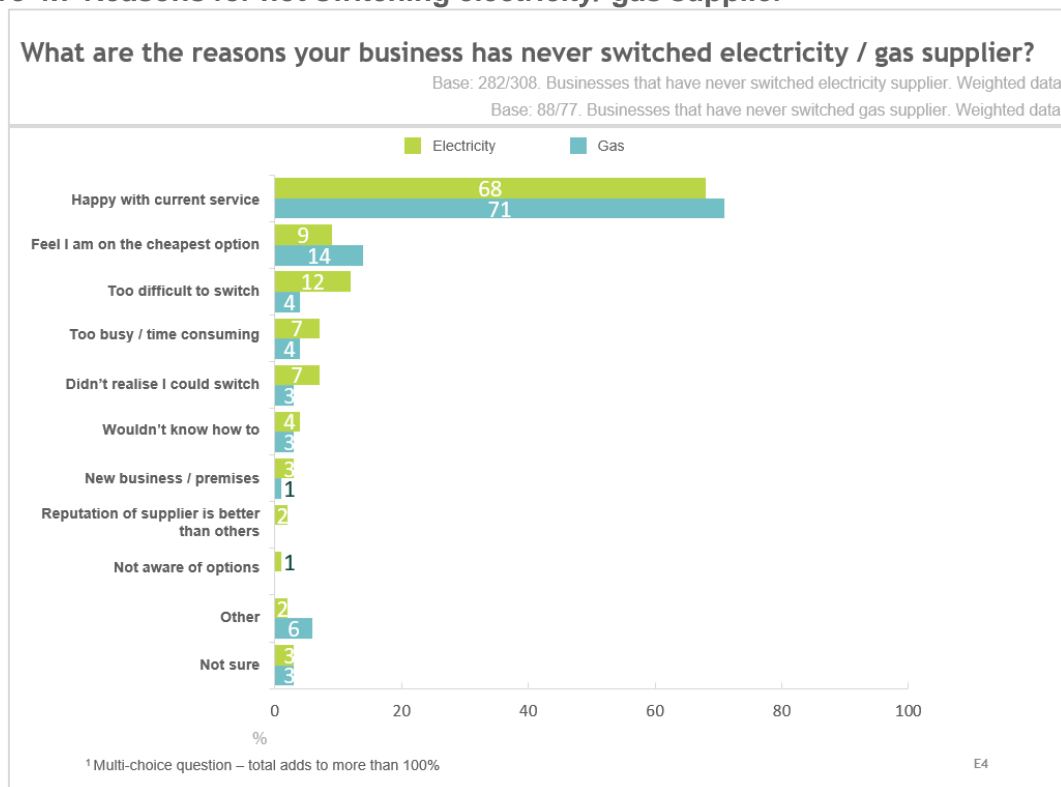
Domestic consumers were much more likely to have switched electricity supplier (59% compared to 37% of businesses). The numbers having switched gas supplier were similar for both surveys. Around two thirds of both domestic (63%) and non-domestic (67%) respondents had not switched.

Reasons for not switching

When asked for the reasons why their business or organisation had not switched electricity supplier, two thirds (68%) responded by saying that they are happy with their current service. Among the other reasons provided 12% commented that switching is too difficult, 9% believe that they are on the cheapest option, 7% say they are too busy or that switching is too time consuming and 7% did not realise that they could switch.

The reasons given for not changing gas supplier were similar to those provided by electricity non-switchers. 71% commented that they are happy with their current supplier and 14% believe that they have the cheapest option.

Figure 4.7 Reasons for not switching electricity/ gas supplier



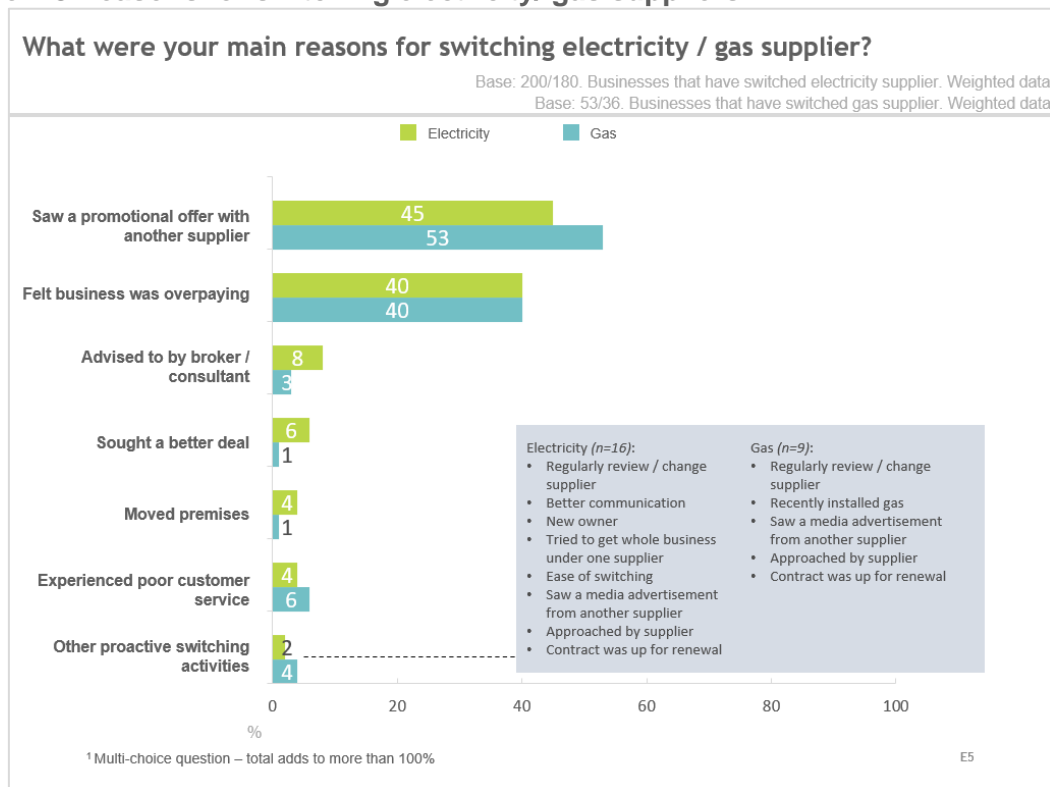
Business non-switchers were more likely to cite satisfaction with their current service as the reason for remaining with the same electricity or gas supplier than domestic consumers. 57% and 45% of household non-switchers gave this reason in reference to their electricity and natural gas supplier respectively. As might be expected, not knowing how to switch supplier or not realising they could switch were more prevalent reasons among domestic than non-domestic consumers.

Reasons for switching

There are two main drivers for switching energy supplier; (i) reacting to a promotional offer by a supplier and (ii) reacting to the feeling that the business is paying too much. 45% of electricity customer and 53% of gas customers switched because of a promotional offer. 40% of both electricity and gas customers changed suppliers because they felt they were paying too much.

Brokers appear to be more proactive with electricity customers, with 8% changing supplier because of their advice compared to 3% of gas customers. Poor customer service was the main reason for change among 4% of electricity customers and 6% of gas customers.

Figure 4.8 Reasons for switching electricity/ gas suppliers

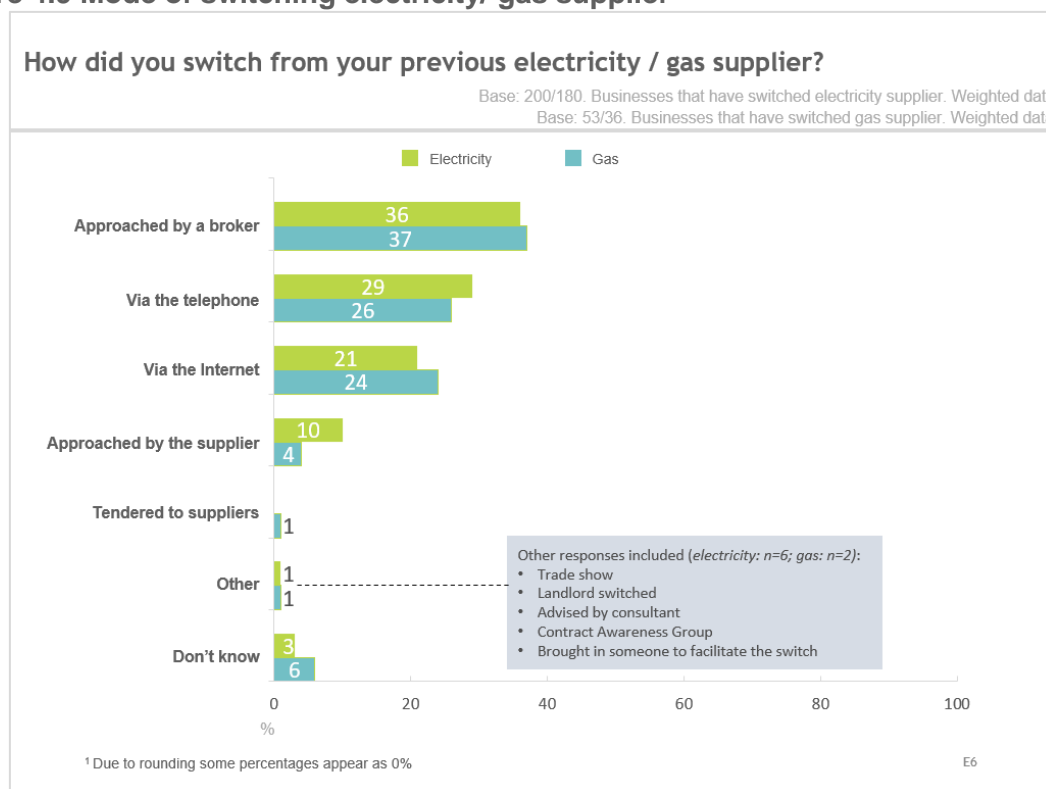


Domestic and non-domestic consumers shared the same main drivers for switching. Domestic consumers were asked an overall question to describe reasons for changing energy suppliers in the 2019 consumers insight tracker. 54% had responded to a promotional offer, while 50% were responding to the feeling that they were overpaying.

Experience of switching

Switchers used a range of modes to move supplier. The most common method was the use of a broker (36% of electricity switchers and 37% of gas switchers), followed by the telephone (29% and 26% respectively) and the internet (21% and 24% respectively). One in ten electricity switchers were approached by the supplier compared to 4% of gas switchers.

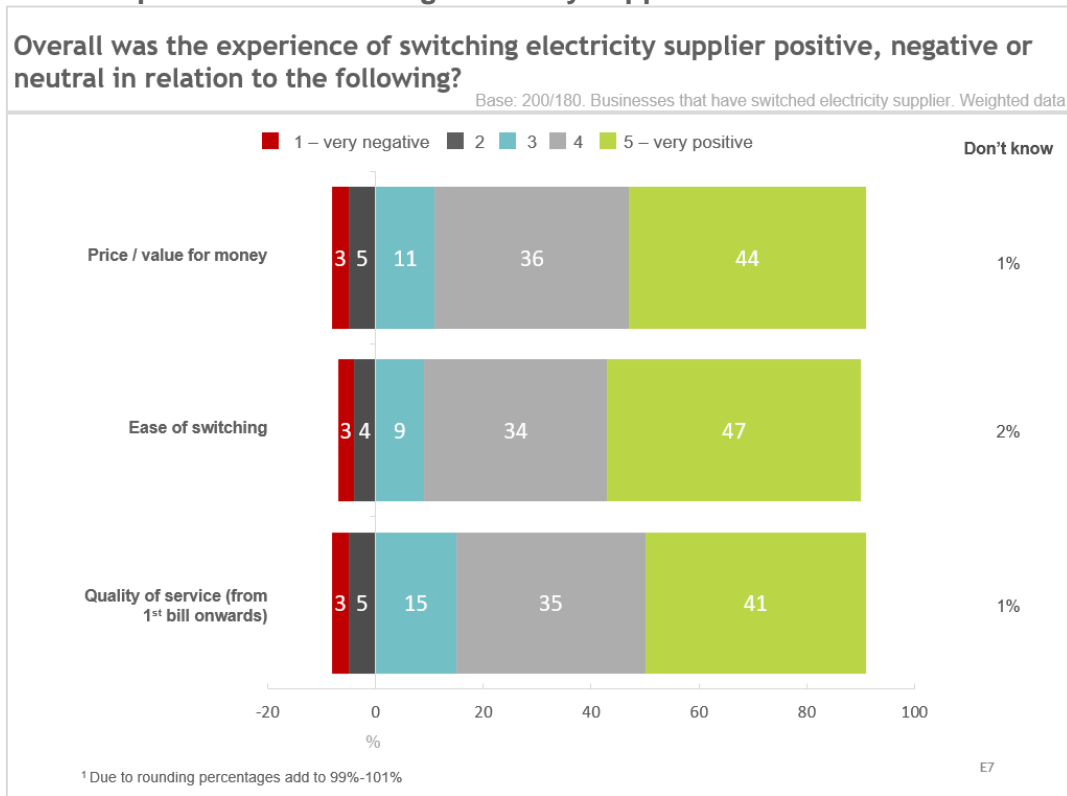
Figure 4.9 Mode of switching electricity/ gas supplier



Electricity

For most electricity switchers the experience was positive across the range of factors (price/value for money (80%), ease of switching (81%) and quality of service (76%)). However, 7% - 8% of electricity switchers rated each of these factors negatively. Those in rural areas were significantly less likely (at the 95% confidence level) than urban businesses to rate the experience of switching as positive in relation to price/value for money (68% compared to 88%) and quality of service (65% compared to 86%).

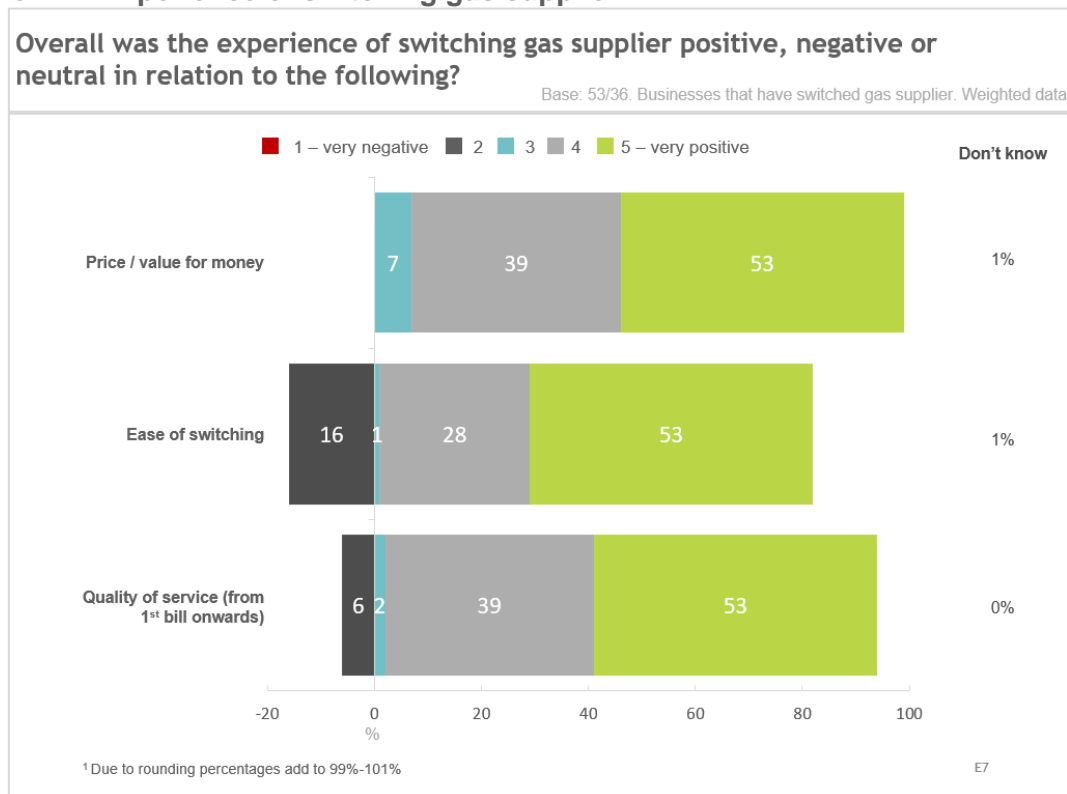
Figure 4.10 Experience of switching electricity supplier



Gas

While the majority of gas switchers had a positive experience in relation to price/value for money (89%), ease of switching (81%) and quality of service (91%), 16% rated the ease of switching as poor.

Figure 4.11 Experience of switching gas supplier



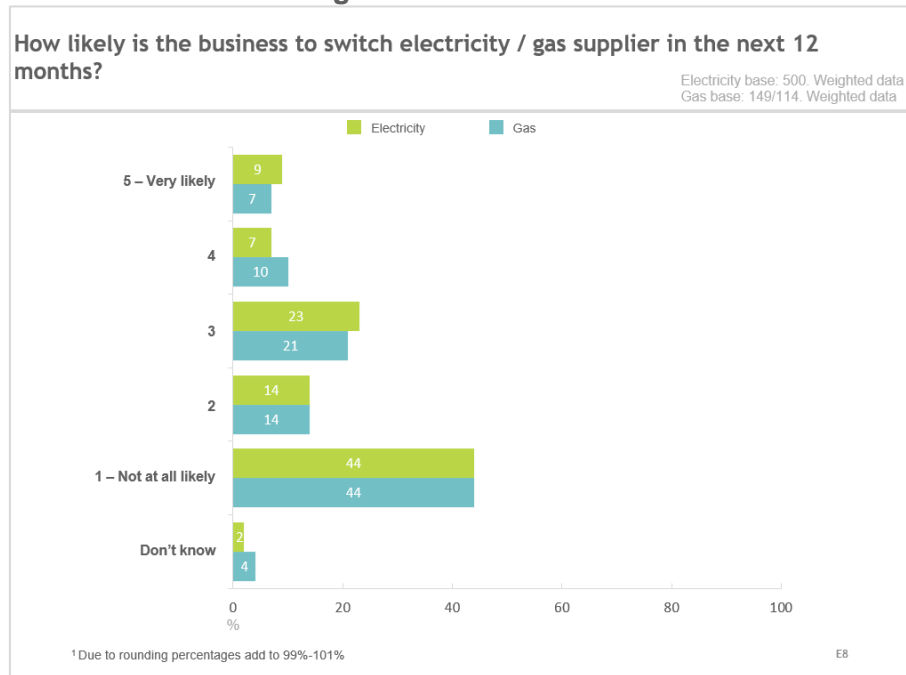


Switchers in the domestic consumer insight tracker were asked to rate their overall experience of switching. The experience of domestic switchers appears less positive than for businesses and other non-domestic organisations. 63% of households who had switched electricity supplier described the experience as positive, dropping to 57% for natural gas supplier.

Likelihood of switching in the future

Just 16% of electricity customers and 17% of gas customers say it is quite or very likely that they will change supplier in the next 12 months.

Figure 4.12 Likelihood of switching in the next 12 months



Those most likely to consider switching are in the manufacturing/production, hospitality and retail/distribution sectors, which are also sectors that tend to be larger users of energy. Those who had recently switched supplier were also significantly more likely (at the 95% confidence level) than those who had never switched to say they would do so again in the next 12 months (33% compared to 8% for electricity supplier; and 22% compared to 14% for gas supplier).

Figure 4.13 Likelihood of switching electricity supplier in the next 12 months by switching behaviour

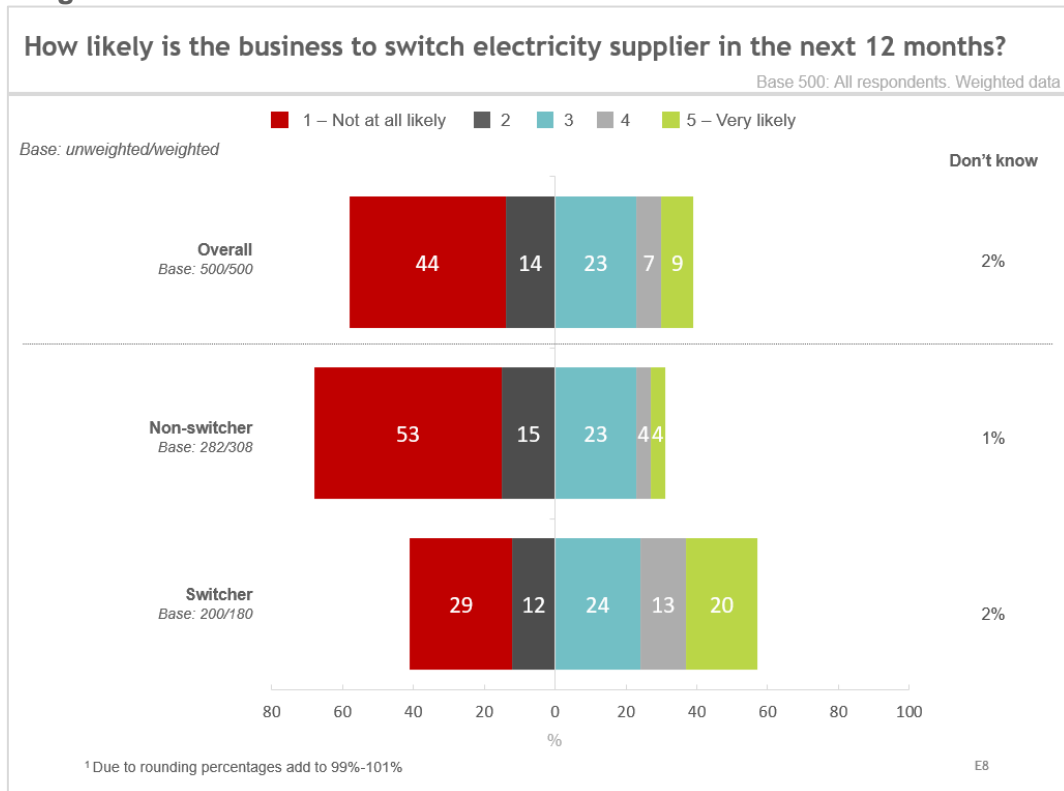
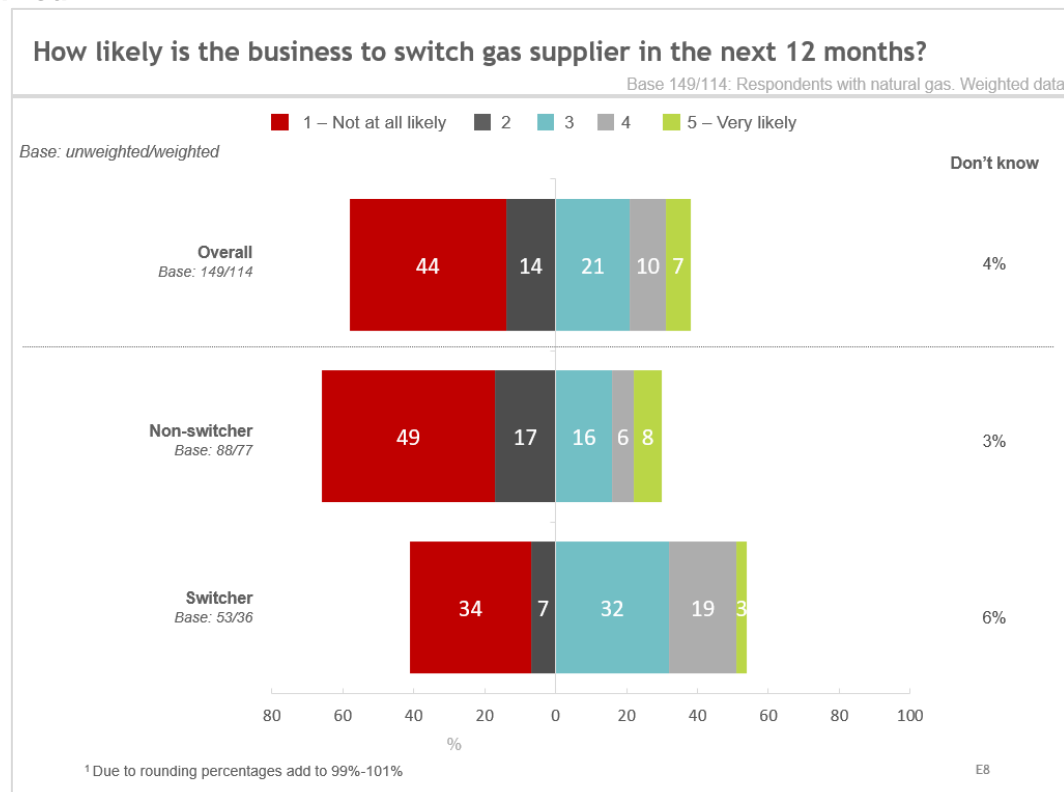


Figure 4.14 Likelihood of switching gas supplier in the next 12 months by switching behaviour



Communication and methods of contact

In this section we assess the methods of communication used by energy suppliers. The topics covered are as follow:

- Method of billing;
- Approach to dealing with correspondence;
- Awareness and use of sources of information and advice; and
- Experience of interacting with energy suppliers.

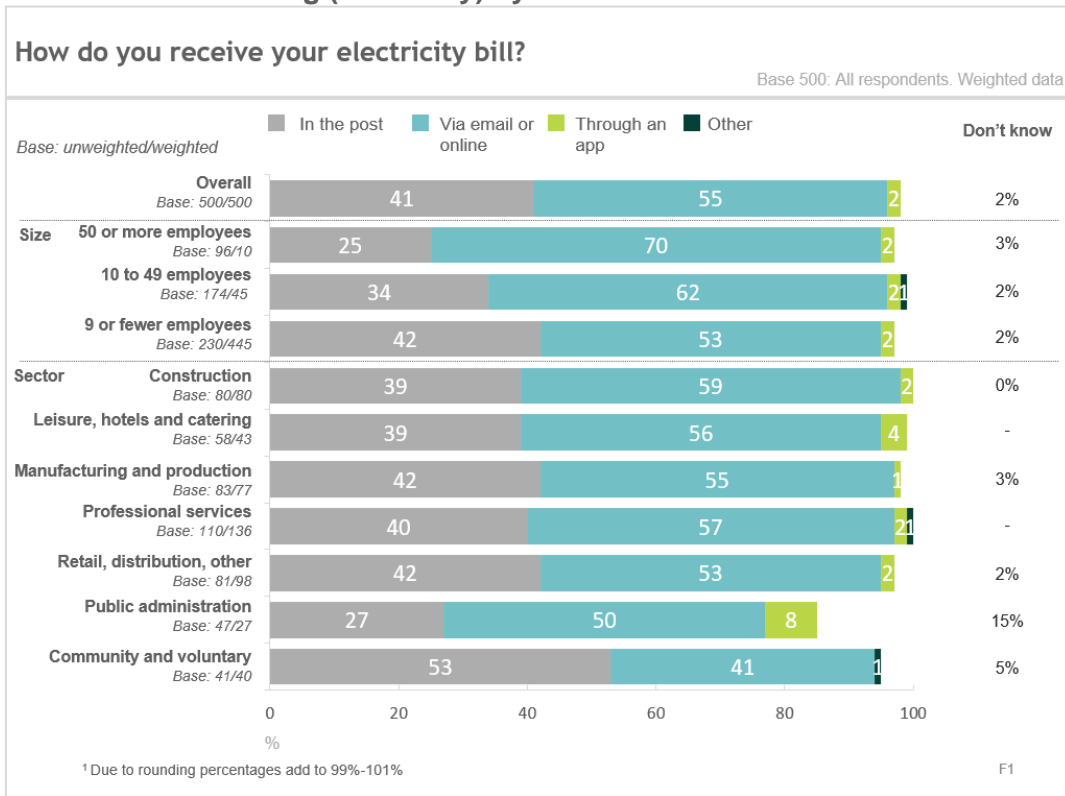
Key findings

- Two fifths (41%) of electricity consumers continue to receive their bill by post, falling to 35% of natural gas consumers. These results are similar to those from the domestic consumer insight tracker, and indicate that the majority have moved away from the traditional paper bill.
- It is interesting to see how customers deal with correspondence from their energy supplier. While over half (55%) read it and understand most or all of it, 41% say they don't read it or only glance at it. Again, this was consistent with the findings for domestic consumers.
- While approximately half of non-domestic consumers were aware of Invest NI, the Federation of Small Business, and Local Council as sources of information and advice on energy matters, only around 1 in 20 had used them.
- 21% of electricity consumers scored their experience of interacting with their energy supplier as 'very positive'. However, mid-sized businesses (10 to 49 employees) and those in hospitality were more likely than those in the other size categories or sectors to give a negative answer. For both electricity and gas, respondents who had switched their supplier in the last 5 years were significantly more likely to describe this experience as positive than those than had not switched.

Method of billing

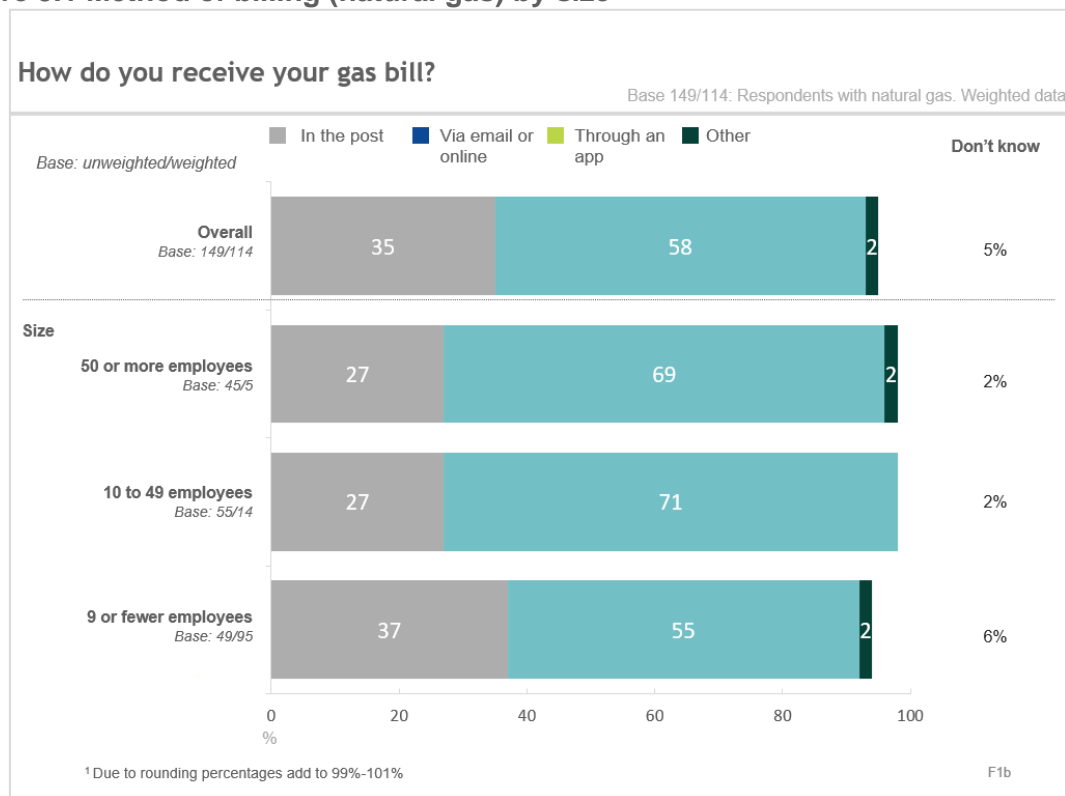
Over half of electricity customers (55%) receive their bill via email or the internet, while 41% continue to receive their bill by post. Larger businesses and organisations are more likely to obtain their bill electronically.

Figure 5.1 Method of billing (electricity) by size and sector



Similarly, for gas customers, 58% receive their bill via email or online, and 35% are issued their bill through the post. Again, larger businesses are more likely to use electronic means to access their bill.

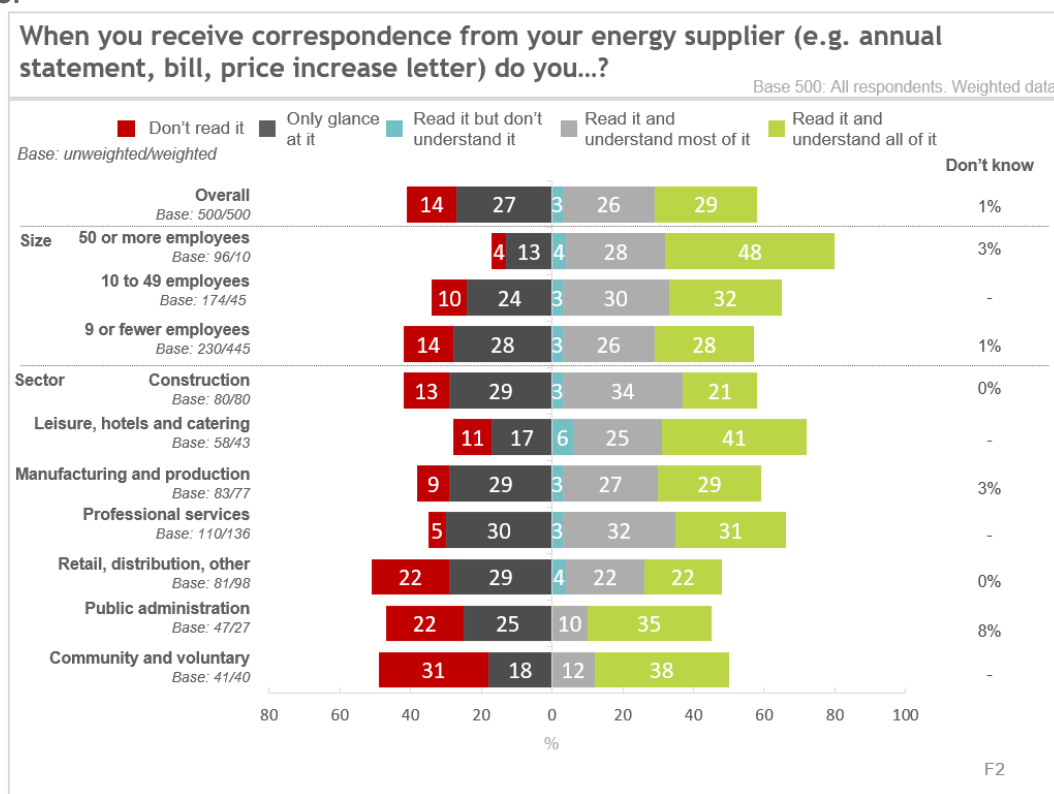
Figure 5.1 Method of billing (natural gas) by size



Approach to dealing with correspondence

It is interesting to see how customers deal with correspondence from their energy supplier. While over half (55%) read it and understand most or all of it, 41% say they don't read it or only glance at it. Those in larger businesses and organisations and in the hospitality and professional services sectors are more likely to pay attention to the detail of their correspondence. Consumers of both electricity and natural gas, were significantly more likely (at the 95% confidence level) to read and understand all of their bill, than those with electricity only (39% compared to 26%).

Figure 5.2 Mode of receiving correspondence from energy suppliers by size and sector

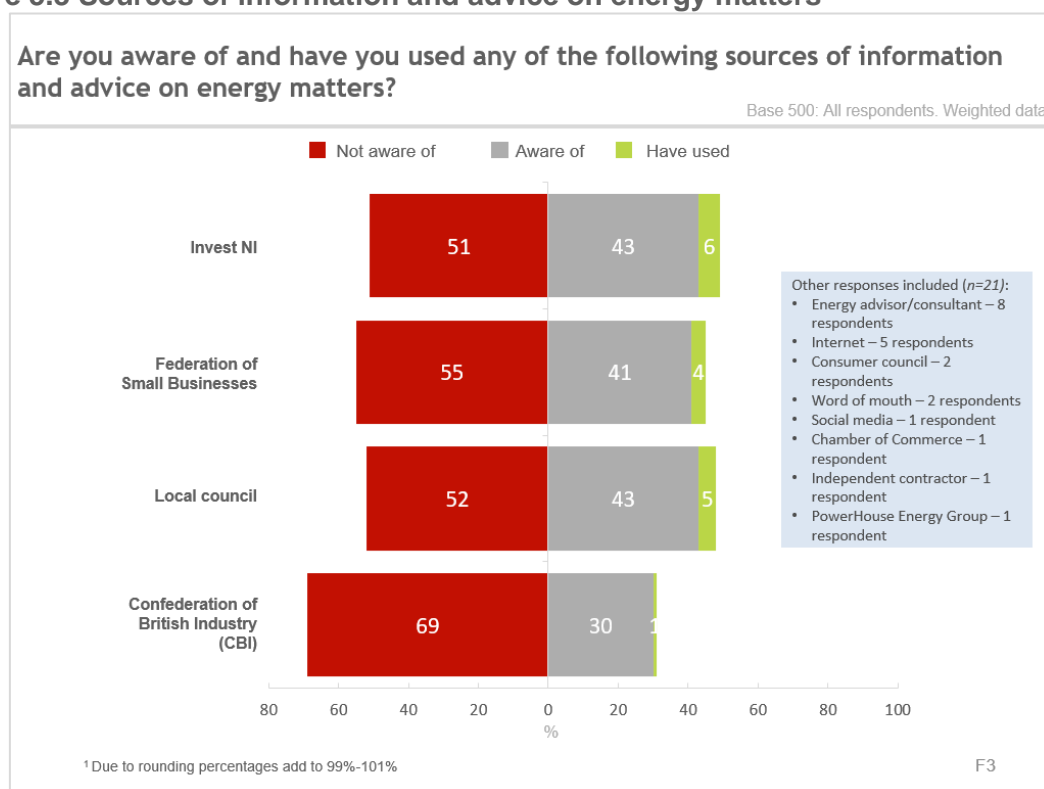


Domestic consumers had moved away from the traditional method of receiving their bill through the post at a similar rate to non-domestic consumers (42% received their bill via email or online, a further 8% through an app, while 35% continued to receive a paper bill). Depending on the type of correspondence, between 31% and 44% of households either do not read the information sent to them or only glance at it. This is also consistent with non-domestic consumers.

Awareness and use of sources of information and advice

Respondents were asked if they were aware of and if they had used information and advice on energy matters from a number of providers. Levels of awareness and usage were similar for Invest NI, the Federation of Small Businesses and the Local Council. Approximately half of businesses and organisations were aware of these sources of information and advice on energy matters, however approximately one in twenty had actually used their services. Awareness and usage of the Confederation of British Industry as a source of this type of information was lower when compared to the other organisations.

Figure 5.3 Sources of information and advice on energy matters



Experience of interacting with energy suppliers

Respondents were asked to describe their experience of interacting with their electricity or gas supplier using a scale.

Electricity

The majority of businesses and organisations rated their experience of interacting with their electricity supplier as either neutral or positive, while 4% provided a negative rating. More than one in five (21%) scored their experience as very positive.

There were a number of differences by size and sector. Businesses and organisations with 10 to 49 employees were more likely to say their experience of interacting with their electricity supplier was negative (8%), as were businesses in the hospitality sector (12%). Respondents who had switched electricity provider in the last 5 years were significantly more likely (at the 95% confidence level) than non-switchers to describe the experience of interacting with their supplier as positive (57% compared to 46%).

Figure 5.4 Experience of interacting with electricity supplier by size and sector

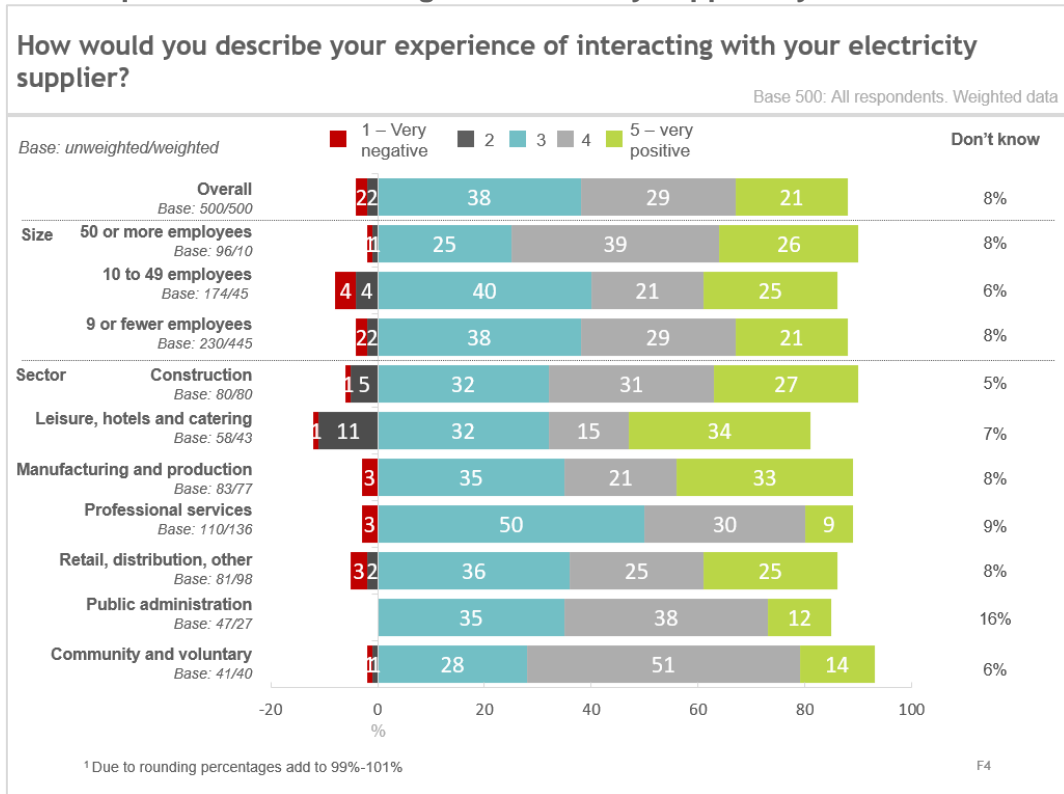
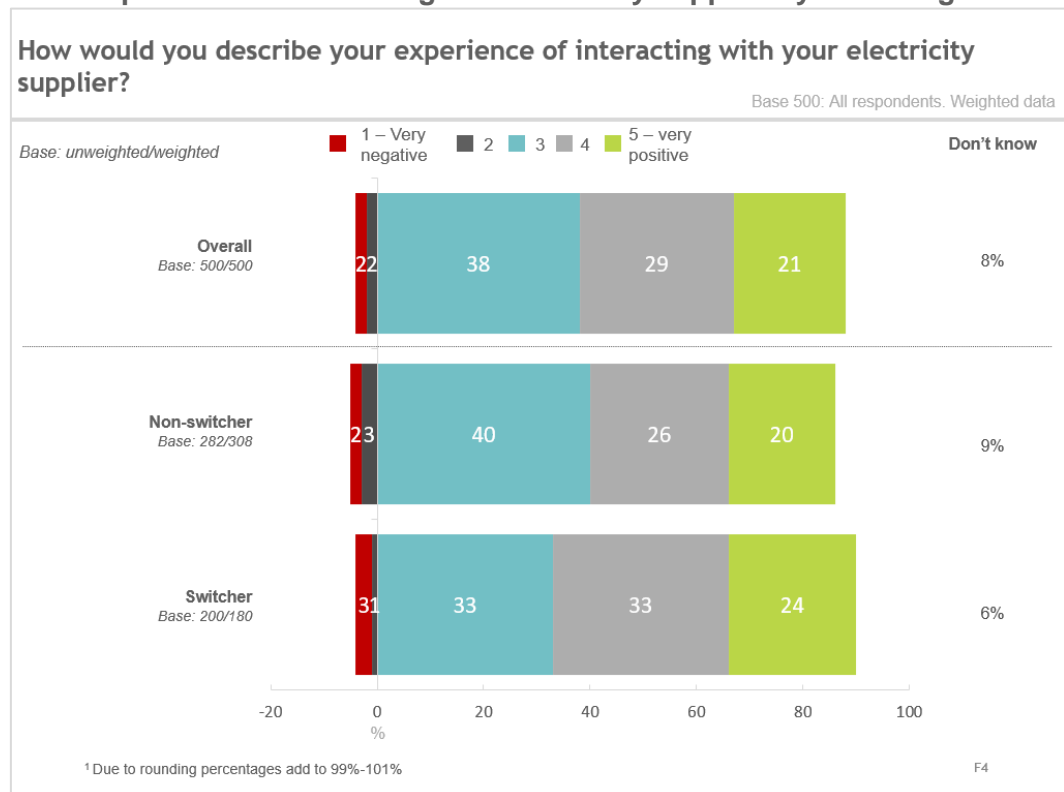


Figure 5.5 Experience of interacting with electricity supplier by switching behaviour



Gas

The majority of gas customers were also either neutral or positive about their interactions with their gas supplier, with one in twenty (5%) rating them negatively. Again, businesses with 10 to 49 employees were more likely to provide a negative rating (11%). As with electricity, switchers were significantly more likely (at the 95% confidence level) than non-switchers to describe the experience of interacting with their supplier as positive (78% compared to 49%).

Figure 5.6 Experience of interacting with gas supplier by size

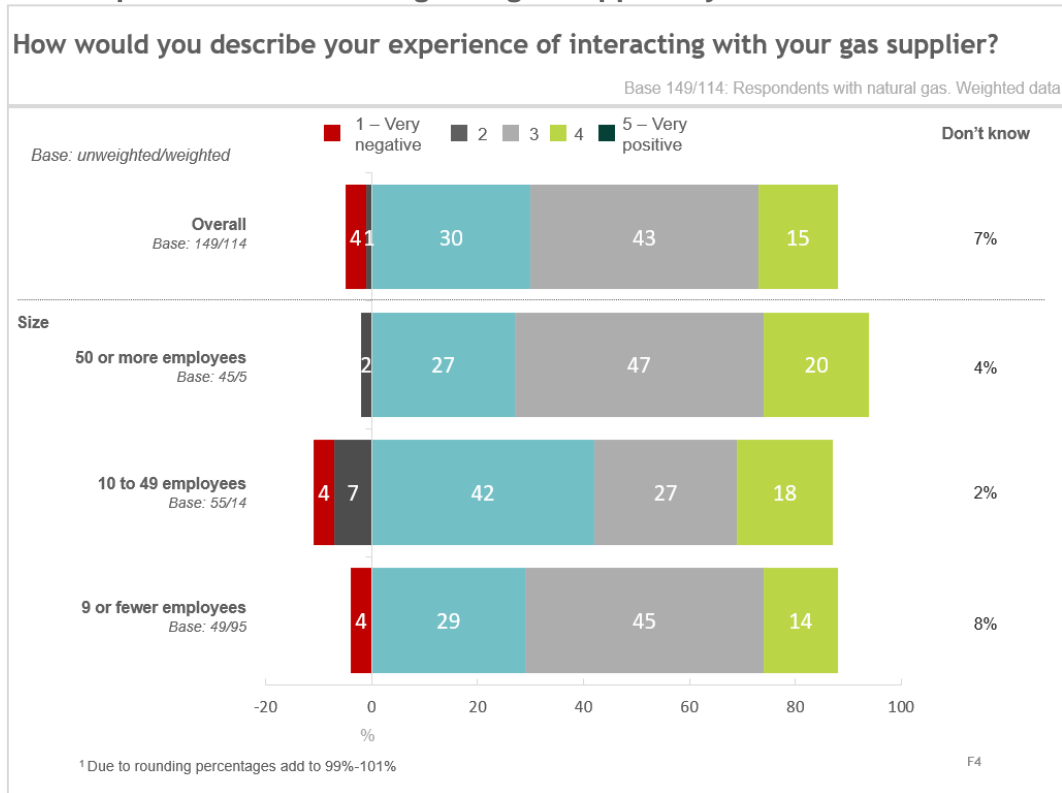
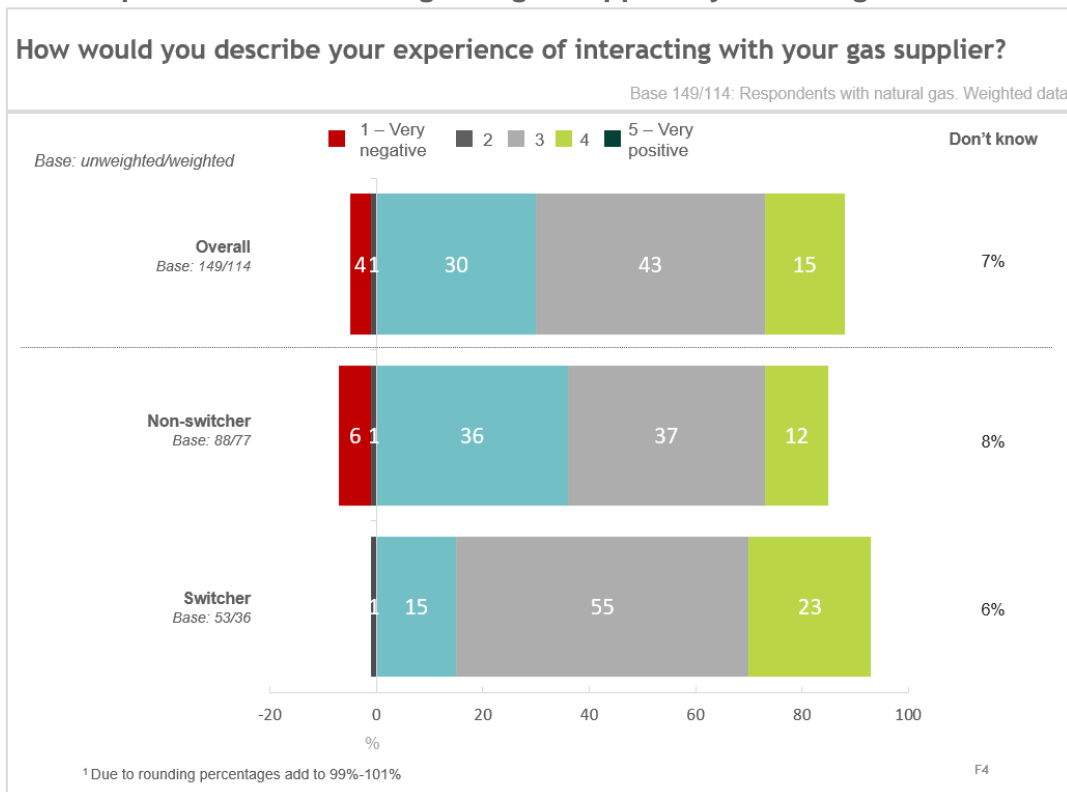


Figure 5.7 Experience of interacting with gas supplier by switching behaviour



Complaint handling

In this section we explore the incidence and experience of making a complaint to an energy supplier. The section is structured under the following headings:

- Incidence of making a complaint;
- Time taken to resolve complaint;
- Satisfaction with the outcome; and
- Incidence of unreported complaint.

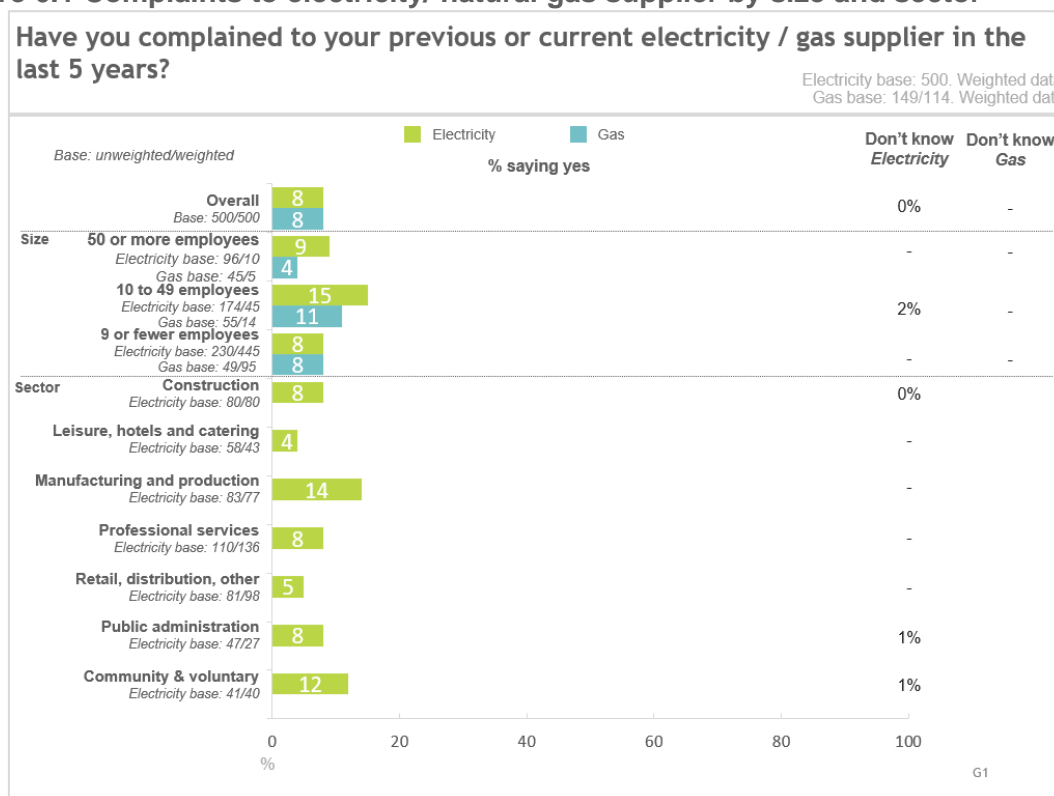
Key findings

- 8% of non-domestic consumers have made a complaint to their energy supplier in the last five years. This is somewhat lower than the percentage of domestic consumers having done so.
- Over one quarter (27%) of those who had complained to their electricity supplier reported that their issue was resolved on the same day the complaint was made and a further 41% found a resolution within two weeks. Non-domestic consumers are having their issues resolved more efficiently than domestic consumers.
- Almost two thirds (63%) were satisfied or very satisfied with the outcome of their complaint. This is considerably higher than for domestic consumers at 40%.
- Almost all (95%) of those who had never complained said they had never had reason to do so, although 72% would know how to go about complaint. 27% were unfamiliar with the complaint's procedure.

Incidence of making a complaint

8% of businesses and organisations had made a complaint to their electricity supplier in the last five years. Those most likely to have made a complaint were those with 10 to 49 employees (15%) and those operating in the manufacturing/production sector (14%). Similarly, 8% of gas customers had made a complaint to their gas supplier in the last five years and again those with 10 to 49 employees were more likely to have made a complaint (11%).

Figure 6.1 Complaints to electricity/ natural gas supplier by size and sector



The numbers of non-domestic consumers making complaints is lower than for domestic consumers. In the 2019 domestic consumer insight tracker, 17% of household electricity consumers and 13% of household gas consumers had complained.

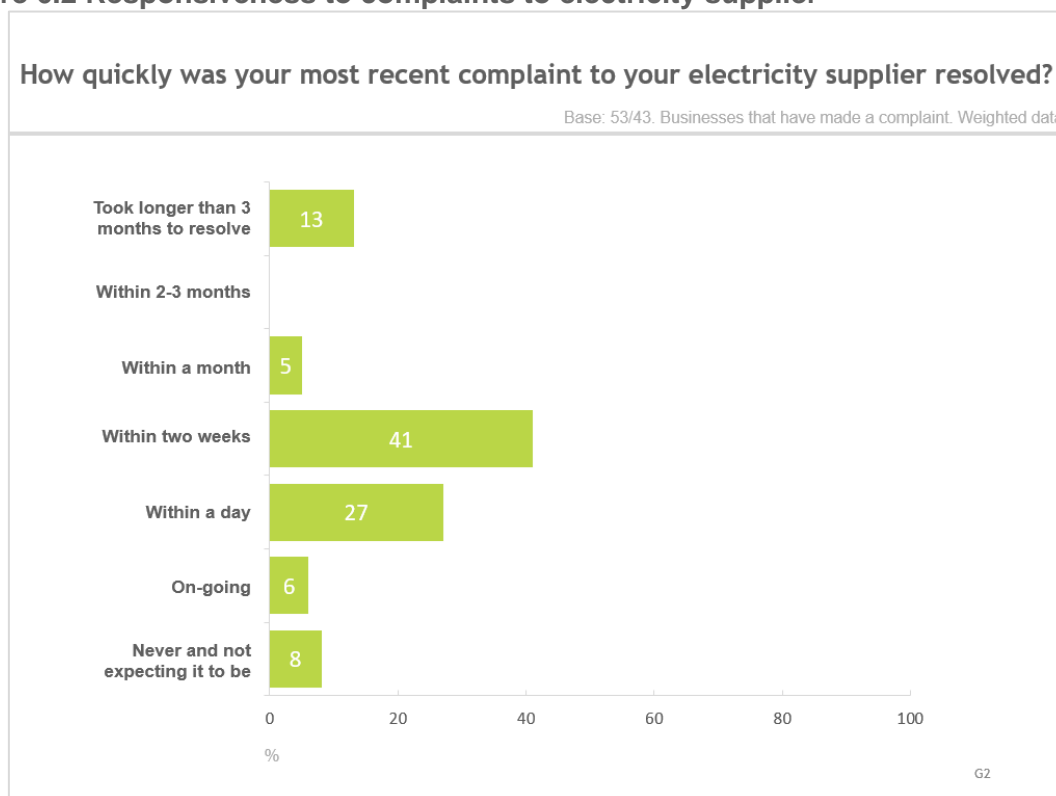
Time taken to resolve complaint

Those who had complained to either their electricity or gas supplier were asked how long it took to resolve their most recent complaint.

Electricity

Over one quarter (27%) of those who had complained to their electricity supplier reported that their issue was resolved on the same day the complaint was made and a further 41% found a resolution within two weeks. 26% confirmed that their complaint was either on-going, took longer than 3 months to resolve or they had no expectations of finding a resolution.

Figure 6.2 Responsiveness to complaints to electricity supplier



Gas

Just 12 respondents had made a complaint to their gas supplier. Of these, 4 have been resolved within two weeks, 3 took longer than this, 1 is ongoing, and 3 do not expect a resolution.



Although a slightly higher percentage of domestic consumers reported that they had their complaint resolved on the same day (32%), households were far less likely to say they had their issue dealt with within 2 weeks (25%). Instead, they were more likely to expect their complaint never to be resolved (16% compared to 8% of businesses and organisations). This difference is statistically significant at the 95% confidence level. This may indicate that the complaints procedure is more effective for commercial consumers than households.

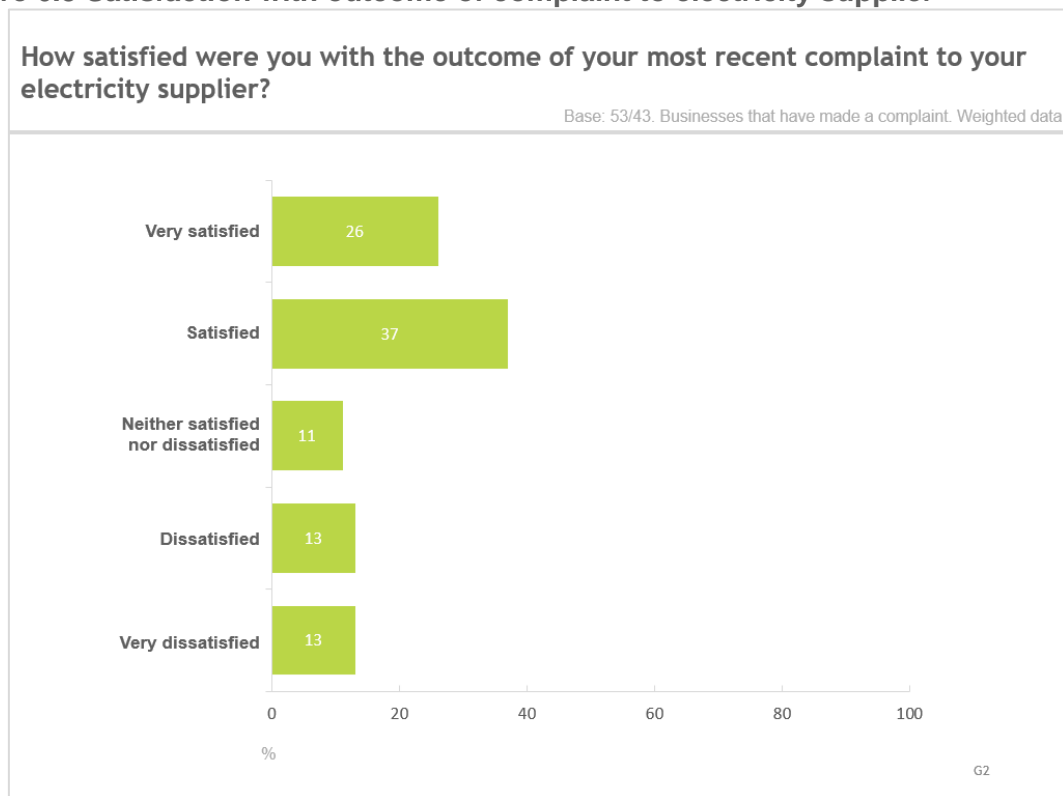
Satisfaction with the outcome

Consumers were then asked to describe their level of satisfaction with the complaint outcome.

Electricity

Of those consumers who had complained to their electricity supplier, 63% were satisfied or very satisfied with the outcome, 11% were neither satisfied nor dissatisfied, 13% were dissatisfied with a further 13% saying they were very dissatisfied. Organisations with 1 to 9 employees reported greater satisfaction with complaint outcomes than those in the larger size categories. Those in construction recorded the highest levels of satisfaction, while the retail /distribution sector were more likely to say they were very dissatisfied with the outcome.

Figure 6.3 Satisfaction with outcome of complaint to electricity supplier



Gas

Of the 12 respondents who had complained to their natural gas supplier, 4 were 'satisfied' or 'very satisfied,' 1 was 'neither satisfied nor dissatisfied', 1 was 'dissatisfied' and 5 were 'very dissatisfied.' Greatest level of dissatisfaction was among organisations with 10 to 49 employees with 4 of the 5 'very dissatisfied' responses coming from this category.

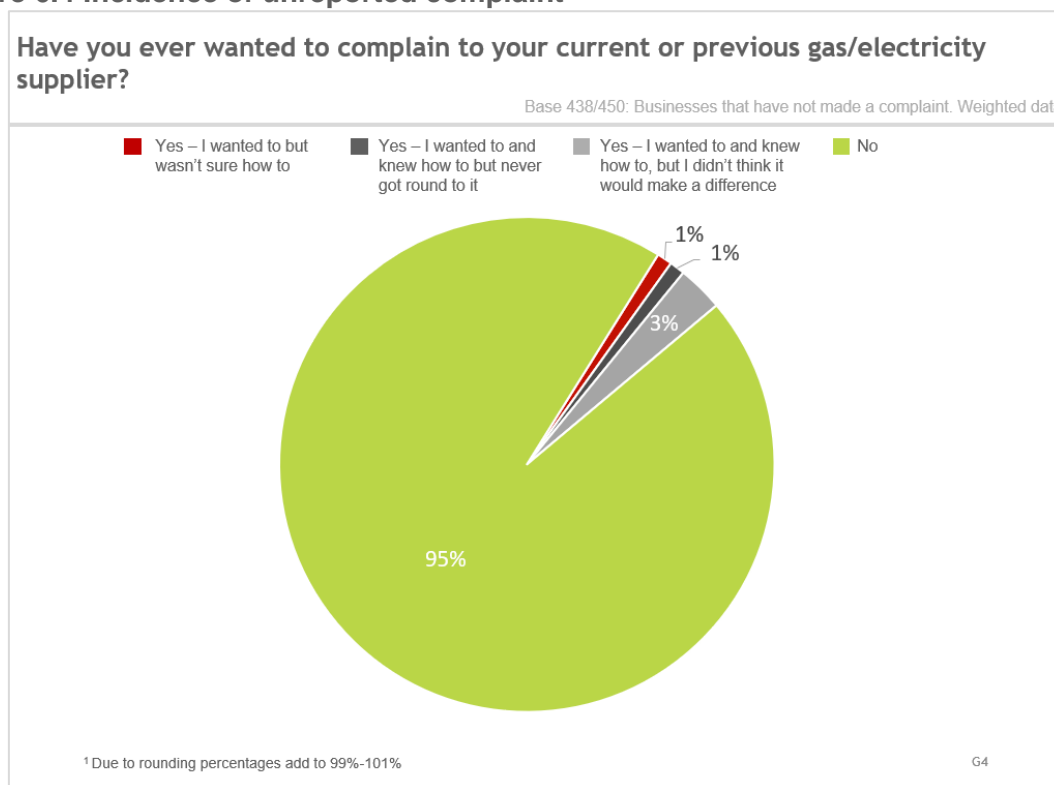


Domestic consumers were substantially less likely to be satisfied with the outcome of their complaint. Only 40% responded as satisfied or very satisfied. This is likely a reflection of the slower response times for domestic than non-domestic consumers noted in earlier paragraphs.

Incidence of unreported complaint

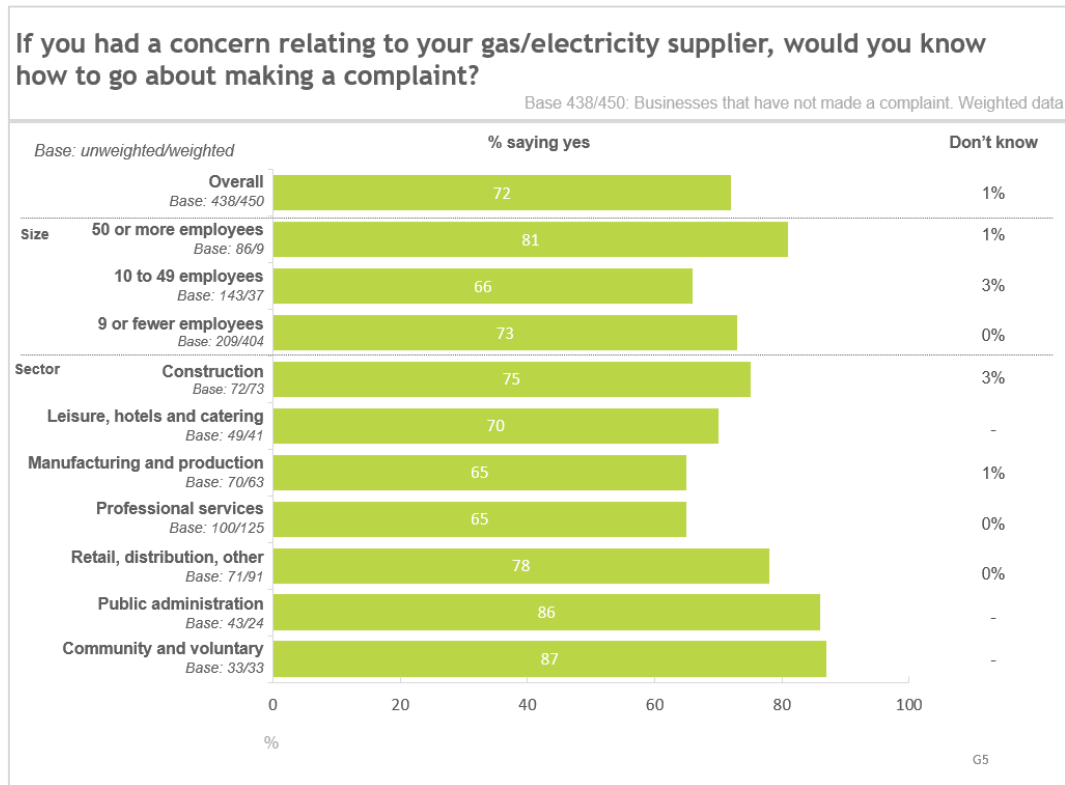
Those consumers who had never complained to a current or previous energy supplier, were asked if they had ever wanted to do so. Almost all, 95% reported that they had never wanted to complain. 3% said they had wanted to but thought it would make a no difference, 1% said they had wanted to but never got round to it and only 1% had wanted to but weren't sure how to.

Figure 6.4 Incidence of unreported complaint



The same respondents were then asked if they would know how to go about making a complaint if they had a concern with their energy supplier. 72% reported that they would, while just over a quarter (27%) would not know how to go about this. Those with 50 or more employees were most likely to know how to make a complaint, with organisations in the public administration and community/voluntary sectors showing greater knowledge of the complaints process than those in other sectors.

Figure 6.5 Knowledge of how to make a complaint to energy supplier by size and sector



18% of domestic consumers reported that they had wanted to complain to a current or previous supplier but had not. This is markedly higher than for non-domestic consumers, despite households also being more likely to complain overall. This finding is statistically significant at the 95% confidence level.

Satisfaction with services provided

In this section, we address the level of consumer satisfaction with services provided by their energy supplier. The areas to be explored are as follows:

- Satisfaction with overall service provided by electricity or gas supplier;
- Level of trust in electricity or gas supplier; and
- Likelihood of recommending electricity or gas supplier.

Key findings

- Businesses and organisations were asked to rate their energy suppliers out of 10. Taking a score of 8 or more as satisfied, 63% and 62% were satisfied with their electricity and gas supplier respectively. Mid-sized respondents were less likely to be satisfied than those in the other size categories.
- On the same scale, trust levels were markedly lower than satisfaction levels. 45% and 35% said they trusted their electricity and natural gas suppliers to give them clear information and a fair price respectively. Similar to the above findings, trust was lower among mid-sized businesses. However, non-domestic consumers appear to have greater levels of satisfaction and trust in their energy suppliers than householders.
- Despite high satisfaction scores, only 2 in 5 (42%) respondents would recommend their electricity supplier to a friend or colleague; giving a Net Promoter Score of -24. Half (50%) of gas respondents would recommend their supplier; giving a Net Promoter Score of -22.
- There appears to be no strong relationship between switching behaviour and satisfaction, trust or likelihood to recommend electricity supplier. Both switchers and non-switchers reported similar levels of satisfaction, while non-switchers reported slightly higher levels of trust and likelihood to recommend. However, those who had switched gas supplier in the last 5 years were more likely to be satisfied and reported higher levels trust and likelihood to recommend than non-switchers.

Satisfaction with overall service provided by electricity or gas supplier

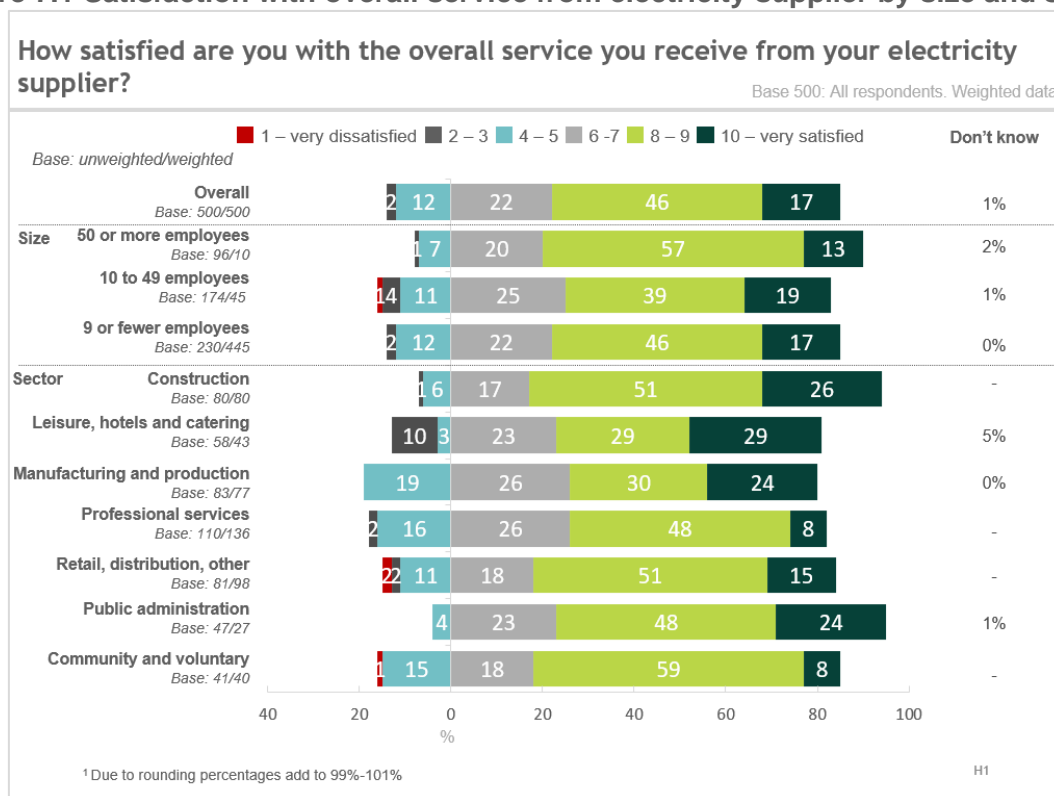
Respondents were asked to rate their level of satisfaction with their electricity or gas supplier on a scale of 1 to 10, with 1 being 'very dissatisfied' and 10 being 'very satisfied'.

Electricity

Overall electricity consumers demonstrated satisfaction with their supplier, with 63% selecting 8 to 10 on the scale. Only 2% gave an answer from 1 to 3. Mid-sized businesses were less likely than businesses in the other size categories to give a rating of 8 to 10, and also recorded higher numbers at the other end of the scale with 5% selecting 1 to 3. Those in the construction sector were most likely to provide a high satisfaction rating (with 77% selecting 8 to 10). However, hospitality businesses showed greater levels of dissatisfaction

(with 10% selecting 1 to 3 on the scale). Those who had recently switched supplier and those who had never switched reported almost identical levels of satisfaction with their electricity supplier.

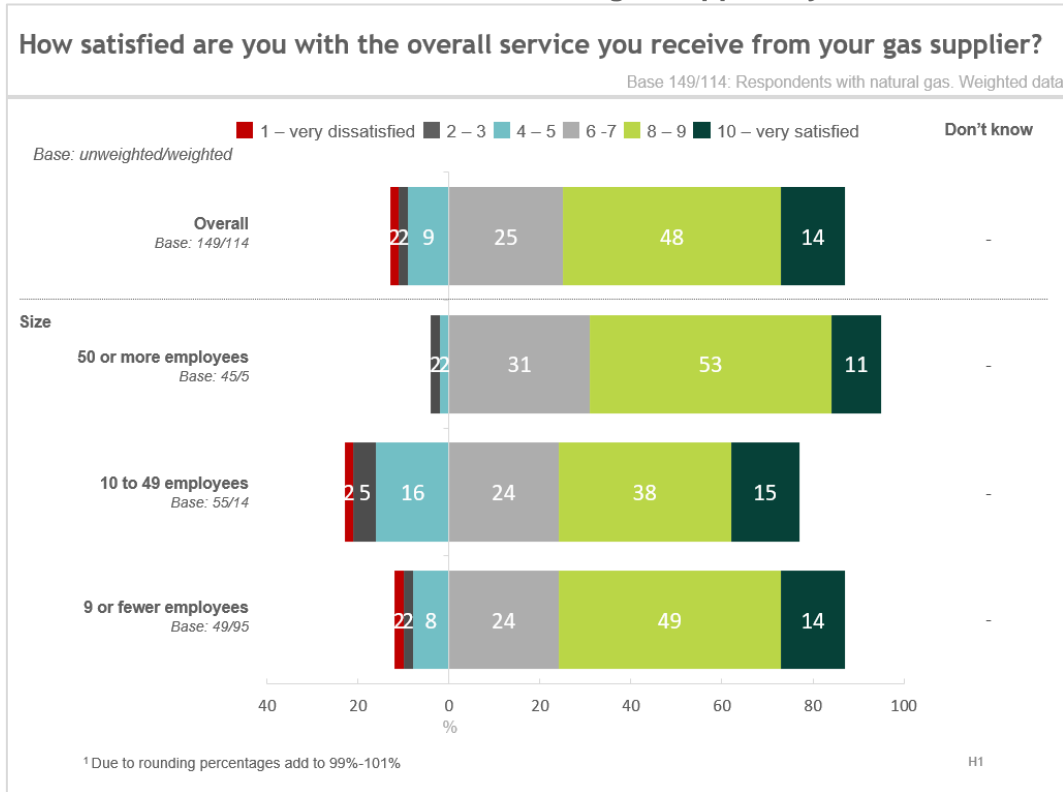
Figure 7.1 Satisfaction with overall service from electricity supplier by size and sector



Gas

Again, the majority of respondents recorded generally high levels of satisfaction with their natural gas supplier, with 62% selecting 8 to 10 on the scale. 4% gave a response of 1 to 3. As with electricity consumers, it is those with 10 to 49 employees who appear least satisfied with the overall service from their supplier (with 7% giving a score of 1 to 3). Those who had recently switched gas supplier showed higher levels of satisfaction than non-switchers, with 73% giving a response of 8 to 10 on the scale compared to 58%).

Figure 7.2 Satisfaction with overall service from gas supplier by size



Satisfaction levels were higher among non-domestic consumers than the household consumer population. Just over half (52%) of domestic electricity customers were satisfied at 8 to 10 on the scale, while 5% were dissatisfied (1 to 3). Satisfaction was lower among domestic gas consumers; 43% were satisfied (8 to 10) and 8% were dissatisfied (1 to 3).

Level of trust in electricity or gas supplier

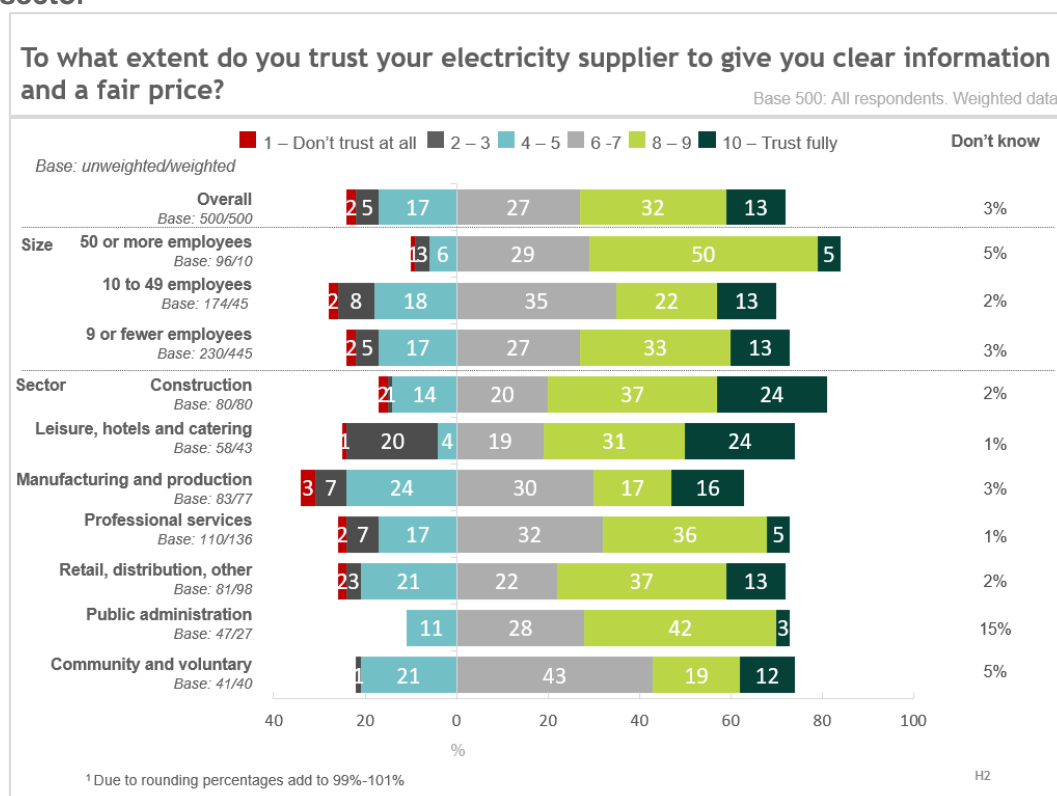
Respondents were asked to what extent they trust their electricity or gas supplier to give them clear information and a fair price. Responses were recorded on a scale of 1 to 10, with being 'do not trust at all' and 10 being 'trust fully'.

Electricity

Levels of trust were markedly lower than satisfaction levels. Overall, 45% of respondents ranked trust in their electricity provided between 8 and 10 on the scale, with 7% describing low levels of trust (1 to 3 on the scale). The manufacturing/production and community/voluntary sectors recorded considerably lower percentages at the highest trust levels than the other sectors (33% and 31% respectively at 8 to 10 on the scale). Those business in the hospitality sector were most likely to record low levels of trust, with over 1 in 5 (21%) giving an answer of 1 to 3 on the scale.

Respondents in the mid-sized category (10 to 49 employees) were substantially less likely to provide a high trust ranking (35% at 8 to 10) than those in the smallest group (46%) or among those with 50 or more employees (55%) and were also more like to record low levels of trust (10% at 1 to 3, compared to 7% for businesses of 1 to 9 employees and 4% in the largest category). Those who had never switched electricity supplier were more likely to report levels of trust at 8 to 10 on the scale than those who had switched recently (47% compared to 40%).

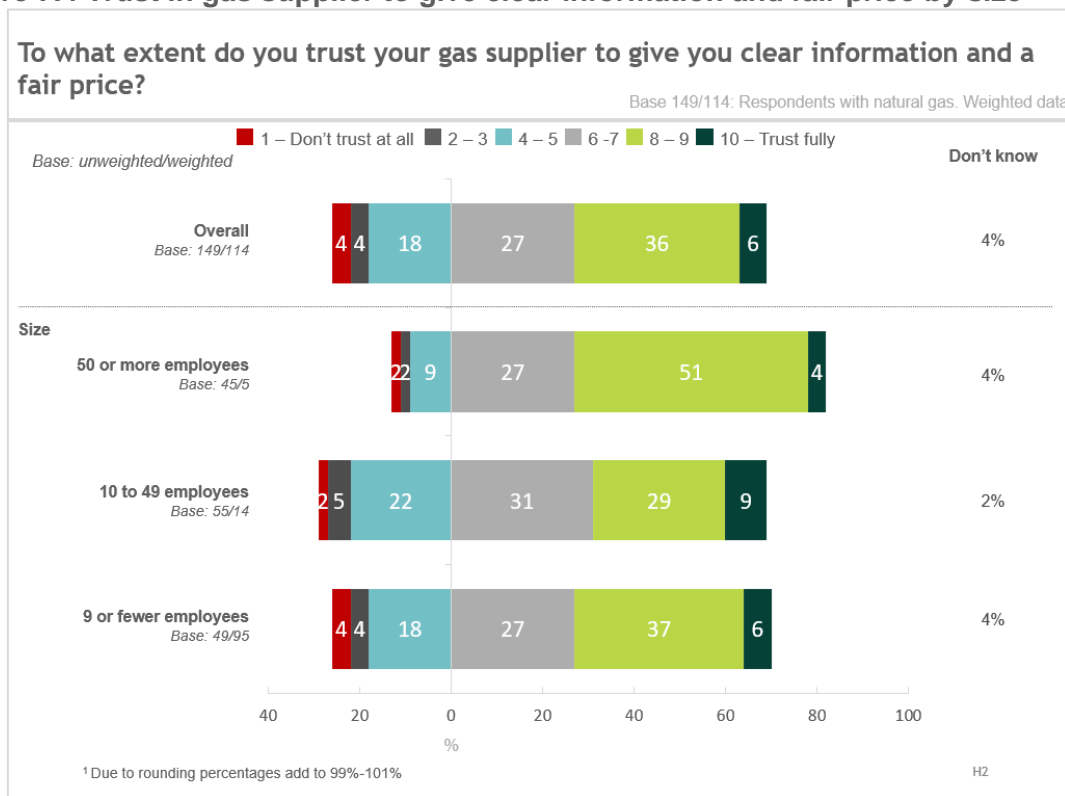
Figure 7.3 Trust in electricity supplier to give clear information and fair price by size and sector



Gas

42% of main gas consumers rated their level of trust in their supplier at 8 to 10 on the scale, while 8% gave a response between 1 and 3. As seen before, mid-sized organisations and businesses were less likely to report high levels of trust in natural gas suppliers than those in the other size categories (38% at 8 to 10 on the scale, compared to 43% for those with 1 to 9 employees and 55% for with 50 or more), however figures on the other end of the scale were similar across size categories. Gas switchers were significantly more likely (at the 95% confidence level) to report high levels of trust (8 to 10 on the scale) than those who had never switched (60% compared to 35%).

Figure 7.4 Trust in gas supplier to give clear information and fair price by size



Trust was slightly higher for non-domestic consumers than domestic consumers. 40% of households trusted their electricity supplier (8 to 10), while 11% did not trust them (1 to 3). Trust levels were lower for natural gas suppliers; just over a third (34%) gave a score of 8 to 10, while 12% ranked trust as low (1 to 3).

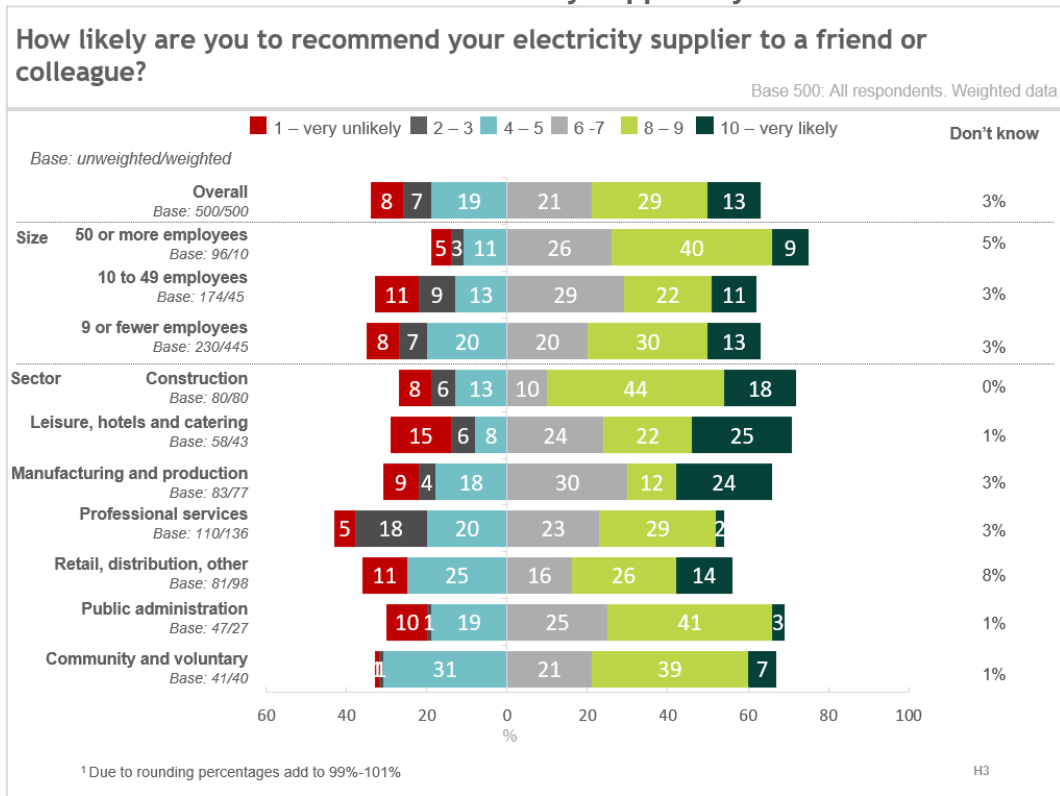
Likelihood of recommending electricity or gas supplier

Respondents were asked how likely they would be to recommend their electricity or gas supplier to a friend or colleague on a scale of 1 to 10, with 1 being 'very unlikely' and 10 being 'very likely'.

Electricity

A minority of electricity consumers (42%) rated their likelihood to recommend at 8 to 10 on the scale, and 15% said they would be unlikely or very unlikely to recommend (1 to 3 on the scale). Those in the mid-sized category were less likely to give rating of 8 to 10 on the scale (33%) than those with fewer (43%) or greater (49%) numbers of employees. The construction sector was most likely to recommend with 62% recording 8 to 10 on the scale, while those in professional services recorded the lowest figures (31% at 8 to 10). Those who had never switched electricity supplier were more likely to recommend their supplier than those who had switched recently (44% at 8 to 10 on the scale compared to 36%). Using responses to this question to calculate the **Net Promoter Score produces a figure of -24.**

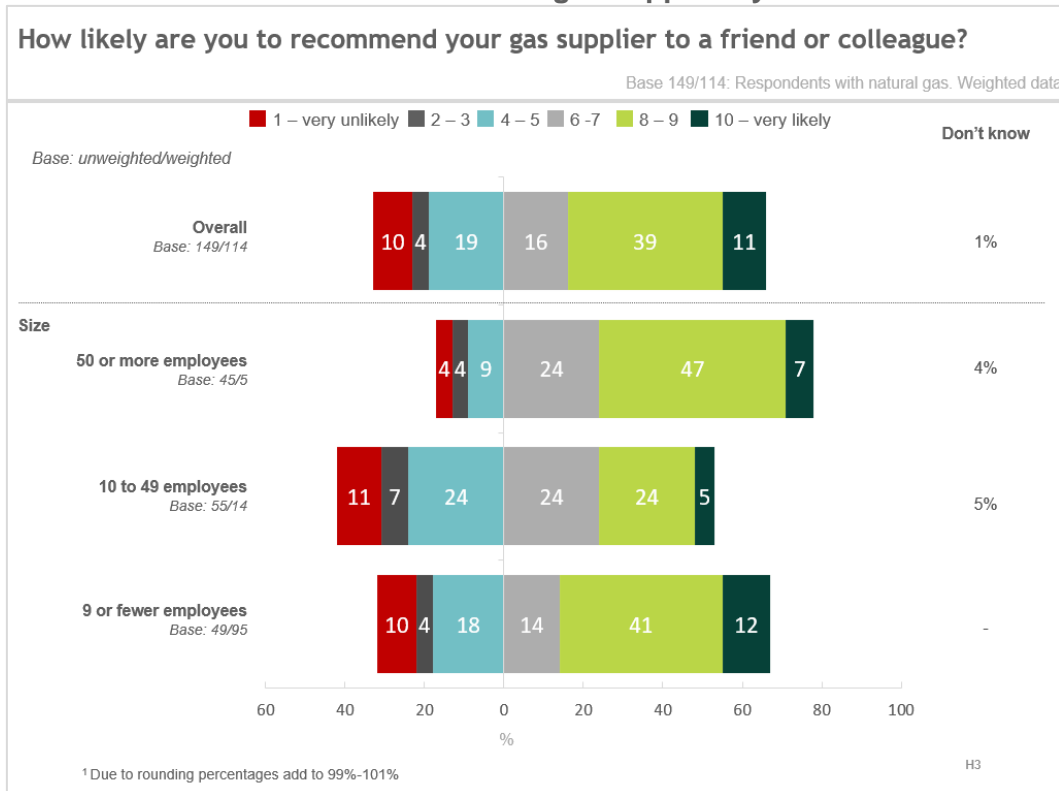
Figure 7.5 Likelihood to recommend electricity supplier by size and sector



Gas

Half of respondents (50%) with natural gas said they would be likely or very likely to recommend their supplier to a friend or colleague (8 to 10 on the scale), and 14% said they would be unlikely or very unlikely to recommend (1 to 3 on the scale). Again, organisations and businesses with 10 to 49 employees were considerably less likely that to recommend (29% at 8 to 10 on the scale) than those in the smallest (53%) or largest (54%) size categories. Those who had recently switched gas supplier were more likely to recommend their supplier than those who had never switched (57% at 8 to 10 on the scale compared to 47%). Using responses to this question to calculate the **Net Promoter Score for gas suppliers produces a figure of -22.**

Figure 7.6 Likelihood to recommend natural gas supplier by size



Energy efficiency, renewables and decarbonisation

In this section we looked at consumer views and experiences of the following:

- Energy efficiency measures undertaken;
- Reasons for not undertaking energy efficiency measures;
- Importance of climate change to the business; and
- Awareness of radical changes taking place in the energy sector.

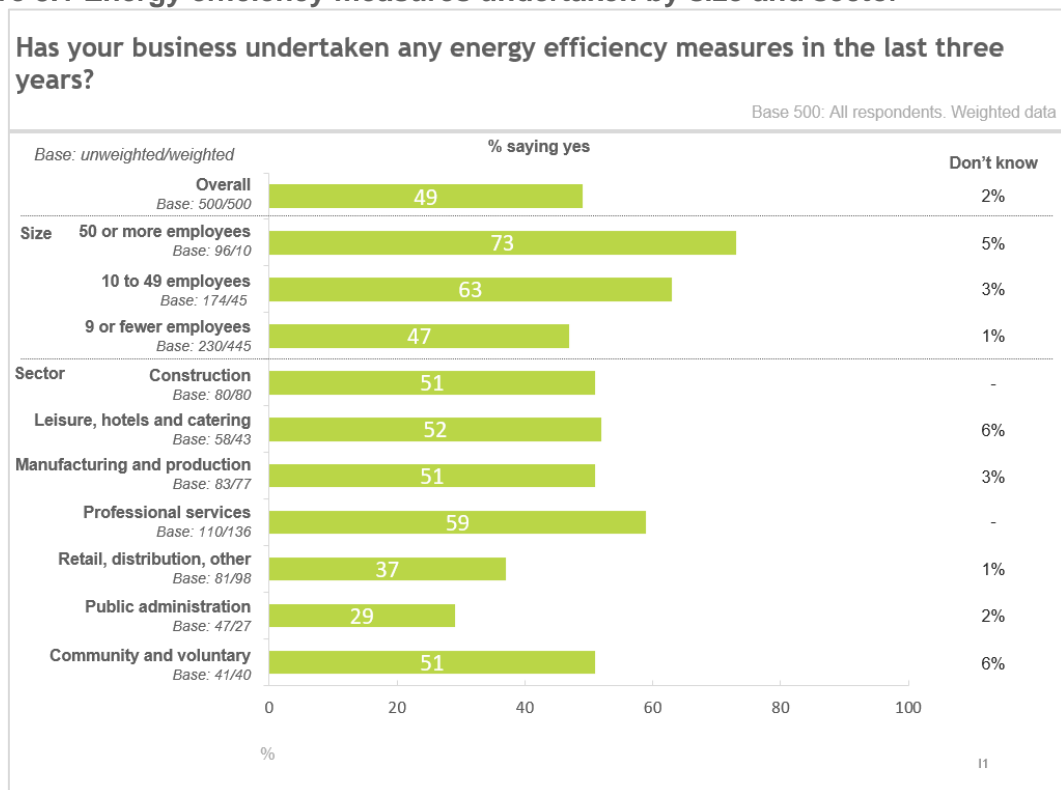
Key findings

- An equal percentage of respondents had undertaken energy efficiency measures in the last 3 years as had not (49%).
- Those consumers with electricity but not natural gas are significantly less likely (at the 95% confidence level) to have undertaken energy efficiency measures than those with both energy types. Businesses and organisations are more likely to have taken these measures than domestic consumers.
- Over half (55%) said it was important or very important to their business (4 or 5 on the scale)
- Over a quarter (27%) said they were 'not at all aware' of the radical changes taking place in the energy sector driven by technology, climate change etc.

Energy efficiency measures undertaken

The same proportion of respondents had installed energy efficiency measures in the last three years as had not (49% each with 2% unsure). Organisations and businesses with 50 or more employees were more likely to have done so than mid-sized or small respondents (73% compared to 63% and 47% respectively). Those in professional services were most likely to have taken such measures, with those in public administration being the least likely sector to have done so. Those consumers with electricity but not natural gas were significantly less likely (at the 95% confidence level) to have undertaken energy efficiency measures than those with both energy types.

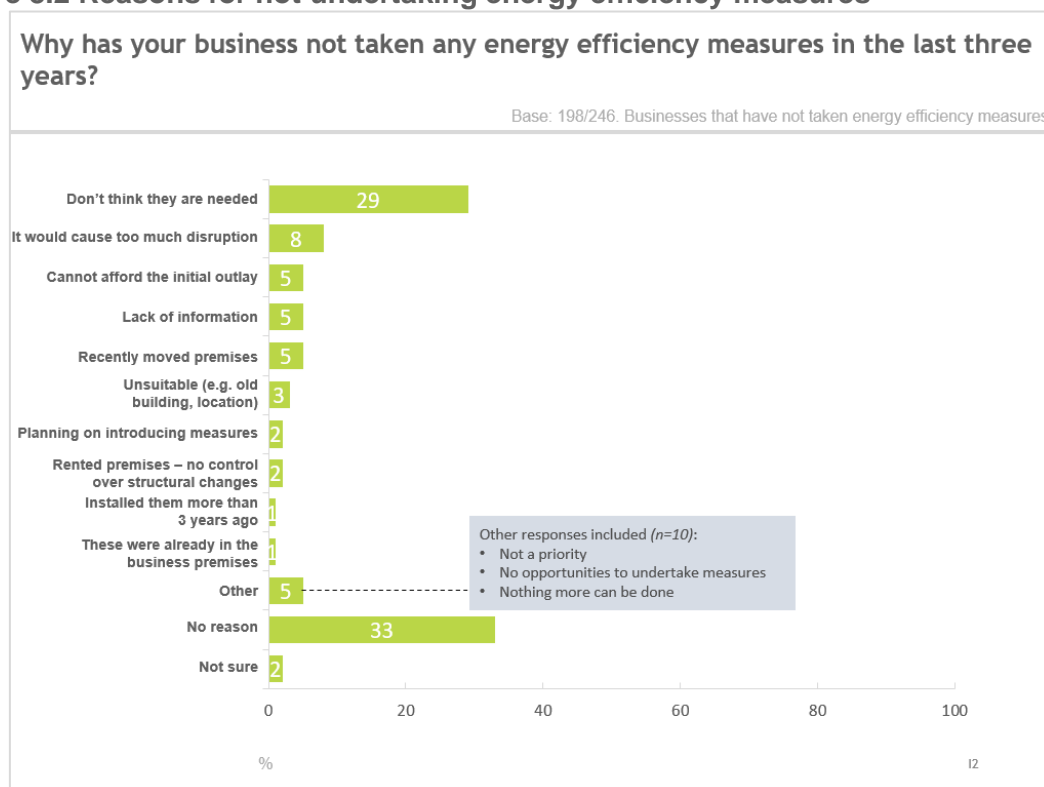
Figure 8.1 Energy efficiency measures undertaken by size and sector



Reasons for not undertaking energy efficiency measures

When those respondents who had not undertaken energy efficiency measures were asked why they had not done so, one third (33%) said there was no specific reason while 29% said they 'don't think they are needed.' Only very low percentages cited inability to afford the initial outlay (5%) or a lack of information around such measures (5%). A number indicated that energy efficiency measures had already been undertaken prior to the 3 year timeframe (2%) or that such measures were pending (2%).

Figure 8.2 Reasons for not undertaking energy efficiency measures

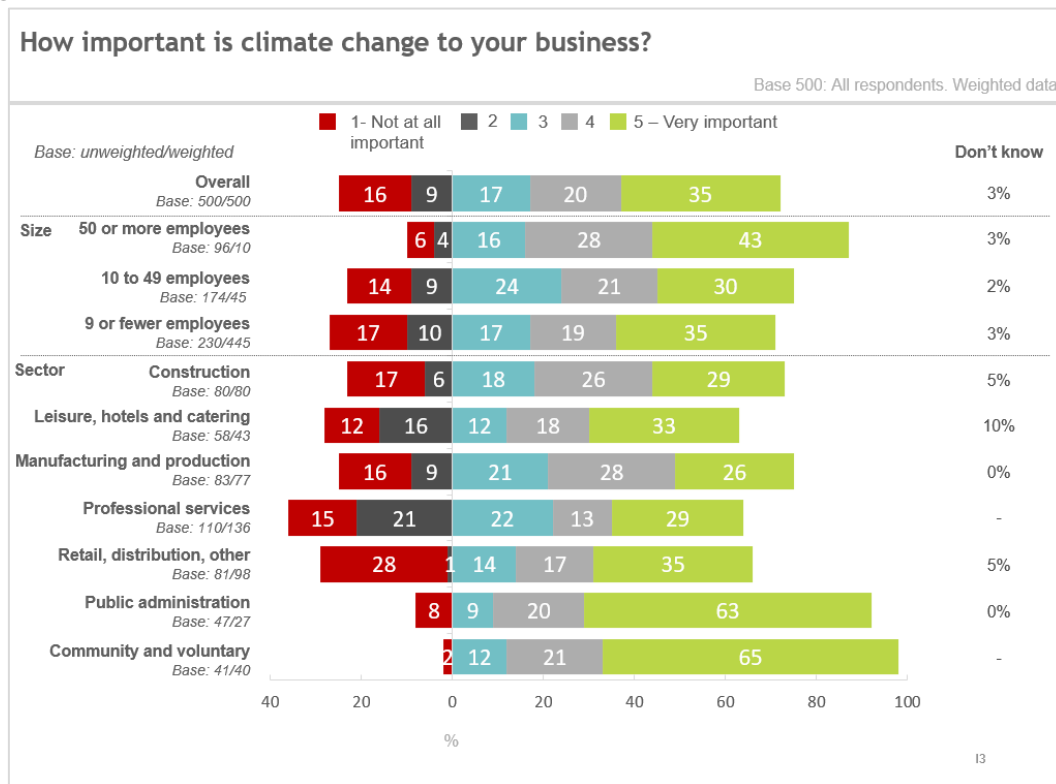


Domestic consumers were less likely than businesses and organisations to have installed energy efficiency measures in the last 3 years. 38% reported that they had done so. For those that had not installed these measures, 14% said they could not afford the initial outlay (compared to 5% of non-domestic consumers). However substantial proportions (around a third for each) said these measures were already in the home or had been carried out previously.

Importance of climate change to the business

Respondents were then asked to rate the importance of climate change to the business on a scale of 1 to 5, with 1 being 'not at all important' and 5 being 'very important'. Over half (55%) said it was important or very important to their business (4 or 5 on the scale) with a quarter (25%) saying it was unimportant or not at all important (1 or 2 on the scale). Similar proportions of respondents with 1 to 9 employees and those with 10 to 49 attached importance to climate change (54% and 51% respectively at 4 or 5) but this rose to 71% of those with 50 or more employees. Those in the public administration and community/voluntary sectors were substantially more likely to report climate change as important to their organisations than any other sector (83% and 86% at 4 or 5 respectively, falling to 55% for construction as the next most likely sector).

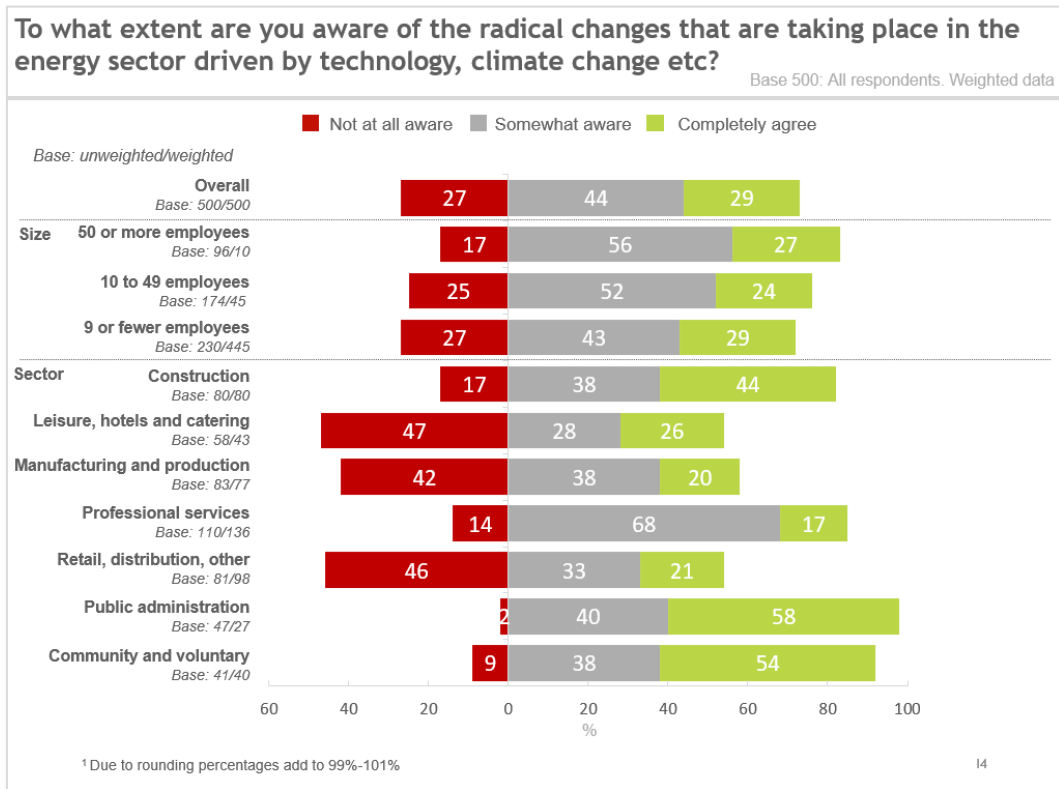
Figure 8.3 Importance of climate change to business by size and sector by size and sector



Awareness of radical changes taking place in the energy sector

Respondents were further asked to what extent they are aware of the radical changes taking place in the energy sector driven by technology, climate change etc. 29% reported that they are 'completely aware', 44% 'somewhat aware' with 27% being 'not at all aware.' Levels of awareness were similar across size categories but varied considerably by sector. Those in hospitality, manufacturing/production, and retail/distribution, were significantly more likely (at 95% confidence level) to report a total lack of awareness than the other sectors (47%, 42% and 46% respectively).

Figure 8.4 Awareness of radical changes in energy sector by size and sector by size and sector



Impact of the Covid-19 pandemic on energy usage

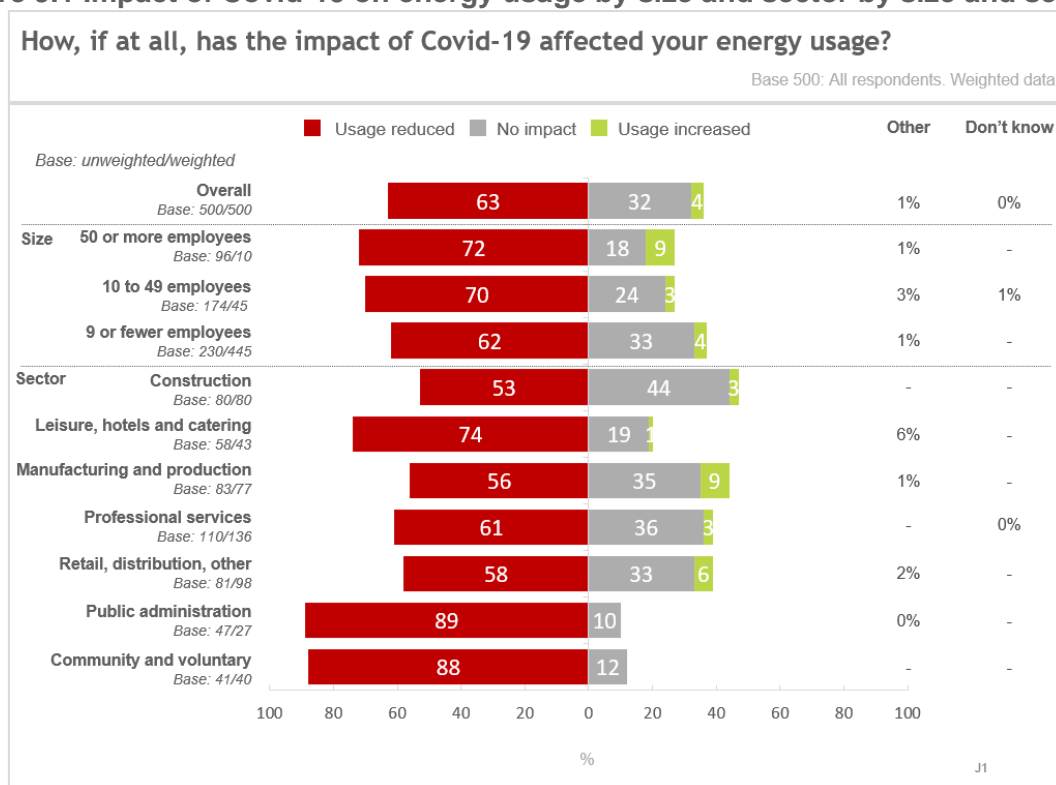
Key findings

- Almost two thirds (63%) of respondents said their energy usage had reduced as a result of the pandemic.
- Those in hospitality, public administration and community/voluntary were most likely to have seen a reduction.

As a special topic question, respondents were asked how, if at all, the Covid-19 pandemic had impacted the business or organisation’s energy usage. Almost two thirds (63%) said usage had reduced as a result of the pandemic, a further 32% reported no impact, while usage had increased for only 4%. Again, there was notable variation across sectors, with those in the hospitality, public administration and community/voluntary sectors significantly more likely to have seen a reduction in usage than businesses in other sectors (74%, 89% and 88% for each respectively). Reasons cited for the fall in usage included:

- Closure of premises during lockdown;
- Staff being either on furlough or working from home; and
- A reduction in trade.

Figure 9.1 Impact of Covid-19 on energy usage by size and sector by size and sector



Conclusions and areas for consideration

The follow paragraphs outline a number of overarching trends within the data and areas which the Utility Regulator may wish to explore further in order to improve outcomes when the survey is repeated in the future. In highlighting the following areas, we have reflected on key priorities within the Utility Regulator's corporate strategy as follows:

- Improving consumer trust and satisfaction with energy suppliers;
- Improving knowledge and satisfaction with the consumer protection arrangements in NI; and
- Improving consumer satisfaction with the switching process.

For most, spending on energy is not a top-of-mind issue

For many non-domestic consumers, energy spending does not appear to be a top-of-mind issue. For most, spending on energy makes up only a small proportion of overall outgoings and on the whole, businesses and organisations do not appear to be looking to neighbouring jurisdictions to compare costs. Most were unable to compare NI's energy costs to those of ROI or GB when asked. Spending on energy does not appear to be a major concern for most non-domestic consumers.

However, it should be noted that there are a number of businesses for whom spend on energy is a considerable part of their outgoings. These tend to be within the manufacturing/production, hospitality, and community/voluntary sectors. Any changes in energy prices, therefore, could have a disproportionate and considerable impact on this group of consumers.

Revised approaches to communication to improve supplier knowledge and awareness of minimum standards

A considerable minority (37%) of non-domestic consumers were unaware of the existence of minimum standards for customer service within the energy markets and 65% and 53% of electricity and gas consumers respectively reported having little knowledge of their supplier. At the same time, 41% of respondents say they don't read or only glance at correspondence from their supplier. Although it may be challenging to achieve break through given the current approach that customers have towards communication with their energy suppliers, the Utility Regulator may wish to work with suppliers to explore different and more effective approaches to communicating with consumers, in order to improve understanding of the energy markets.

Increased competition is not translating to improved consumer experience

Despite the intended benefits of competition in the NI energy market, most respondents perceived 'no change' in respect of service provided, responsiveness of suppliers and availability of suppliers which suit individual needs. Responses were more positive in relation to the cost of energy and tariff options. The Utility Regulator may wish to further investigate

the ways in which suppliers are interacting with and serving non-domestic consumers to improve these outcomes when the tracker is repeated.

Addressing the specific needs of the hospitality sector

The views of the hospitality sector on the impact of improved competition were particularly negative. This may be a reflection of the mood of the sector in light of the disproportionate impact of the Covid-19 pandemic on businesses of this type, however they were accompanied by lower levels of awareness of supplier and tariff choice as well as of the existence of minimum standards of service. Hospitality businesses were also more likely than any other sector to report the experience of interacting with their electricity supplier as negative. These findings may be linked to the low incidence of switching within the sector, as findings elsewhere in the survey indicate that recent switching is associated with higher levels of understanding of the energy market and more positive experiences of interacting with suppliers. As hospitality businesses are likely to be larger energy users, the Utility Regulator may choose to more specifically explore the needs and level of engagement of this sector in relation to the energy markets.

Looking again at information and resources on the energy markets

Over a quarter of electricity and natural gas consumers report that comparing energy deals is difficult. This was particularly the view among those in rural locations. There is evidence, however, that non-domestic consumers are not aware of or are not using available resources which may enable them to make more informed choices. Three quarters (75%) were unaware of the Consumer Council price comparison tool and while around half of respondents knew about information and advice offered by Invest NI, the Federation of Small Business and Local Council, only one in twenty had actually used their services. The Utility Regulator may wish to encourage and support CCNI to promote the price comparison tool, as well as promoting the other available resources in this area.

Effective complaints process

Non-domestic consumers reported better responsiveness and overall satisfaction in respect of how complaints were handled than their domestic counterparts. Only very few had complained at all, but the vast majority of those who had not complained also said they had never wished to do so. Most understood how to go about making a complaint, therefore the process itself is not a barrier. These findings indicate that suppliers are performing well in terms of complaint handling.

Missed opportunities to secure best energy deals

Businesses and organisations appear to prioritise convenience over cost while their energy supplier continues to meet their expectations, with over two thirds of both electricity and natural gas consumers saying they did not switch because they were happy with their current service compared to 9% and 14% who felt they were on the cheapest option. This finding is reflected to some extent in the satisfaction ratings given by non-domestic consumers to their energy suppliers, alongside low incidence of complaints and unreported complaints.

The low rate of switching is particularly noteworthy given the overwhelmingly positive experience of those who do switch, indicating that the process of switching itself is not a barrier. However, there is a clear relationship between switching supplier and likelihood of being on a promotional tariff. As incidence of switching and intended switching are low overall

and particularly for smaller businesses, there may be missed opportunities for non-domestic consumers to avail of better value for money in the energy markets. The Utility Regulator may wish to encourage small businesses in particular to take a more proactive role in securing best value for money from their energy suppliers.

Some satisfaction, with lower levels of trust or likelihood to recommend

While many respondents were reportedly satisfied with the service provided by their energy suppliers, this was accompanied by low levels of trust in suppliers to provide clear information and fair prices and lower levels still of likelihood to recommend their supplier to a friend or colleague. The Utility Regulator may wish to better understand the reason behind these outcomes. A considerable proportion of consumers, for example, rated satisfaction in the middle of the scale, which may be indicative of low engagement between the consumer group and their suppliers and could be linked to the low levels of knowledge and awareness of the minimum service standards reported elsewhere in the survey.

Greater engagement resulting in better outcomes for some measures but not others

Engagement, measured in terms of switching behaviour, was associated with better understanding of certain aspects of the energy markets. Those who had switched in the last 5 years were significantly more likely to report having some or good knowledge of their suppliers than those who had not switched (46% compared to 28% for electricity supplier; 64% compared to 41% for gas supplier). Switchers were also significantly more likely to be 'completely aware' of having a choice of suppliers and tariff types than non-switchers (71% compared to 52% for choice of supplier, and 67% compared to 46% for choice of tariff). Switchers were also significantly more likely than non-switchers to perceive an improvement in service and tariff options available as a result of increased competition in the energy markets.

Recent switching of gas supplier is associated with improved outcomes in terms of overall satisfaction, trust, and likelihood to recommend. However, this pattern was not repeated with electricity suppliers. Those who had recently switched electricity supplier and those who had never switched instead reported almost identical levels of satisfaction, and those who had never switched also recorded higher levels of trust in and likelihood to recommend their electricity supplier than those who had switched in the last 5 years. The Utility Regulator may wish to carry out additional research to determine the drivers behind satisfaction with energy suppliers.

Looking again at the experiences of mid-sized businesses

In responses to key questions, mid-sized businesses (those with 10 to 49 employees) returned more negative outcomes than those in the other size categories. They were less likely to be satisfied with the overall service provided by their electricity or gas supplier, less likely to trust their suppliers and were also more likely to report the experience of interacting with their suppliers as negative. There may be a number of reasons for this trend.

Mid-sized businesses were significantly less likely to have been appointed a key contact person or account manager by their supplier than those with 50 or more employees, however businesses and organisations at the upper limit of the size range may have similar or growing

energy needs and requirements to those in the largest grouping. The Utility Regulator may wish to explore further the reasons behind these outcomes for mid-sized consumers and take measures aimed at improving the experience of this category specifically.

Opportunity for awareness-raising around energy transition

A considerable proportion of businesses reported having undertaken energy efficiency measures in the last three years, however an equal proportion had not done so. Smaller consumers were considerably less likely to have undertaken such measures. For the majority of respondents who had not made these changes, there was no specific reason for inaction or they 'don't think they are needed'. Alongside this, 25% rated climate change as unimportant to the business and a similar proportion were 'not at all aware' of the radical changes taking place in the energy sector. Given this, there may be an awareness raising or educational piece for the Utility Regulator to undertake to help prepare businesses for the ongoing energy transition. This is particularly necessary for small sized non-domestic consumers.

Clear impact of the Covid-19 pandemic

Almost two thirds of respondents reported a reduction in energy usage due to the pandemic. This finding indicates the severity of the impact of pandemic on organisations and businesses.

Appendix A - Detailed methodology

Approach

Perceptive Insight undertook a statistically representative telephone survey of non-domestic energy consumers in Northern Ireland using a telephone interviewing methodology. The representative nature of the research allows statistically significant comparisons to be made between subgroups, such as sector and size. The survey represents a baseline study which will be repeated periodically over time to measure and track changes in consumer perceptions.

Interviewing took place during August and September 2020 with each interview taking, on average, 10 to 15 minutes to complete. Interviewing was carried out in compliance with the GDPR 2018 and the Market Research Society Code of Conduct. It should be noted that interviewing took place during the Covid-19 pandemic. Social distancing and trading restrictions were in place at this time. The impact of these restrictions on certain sectors, particularly the leisure and hospitality sector, may be reflected in the results. This should be taken into consideration when the survey is repeated in the future.

The following subsections outline the methodological approach taken to the study.

Questionnaire design

The questionnaire was designed in collaboration with the Utility Regulator project team. Where possible, questions were designed to allow for comparison with the 2019 Domestic Consumer Insight Tracker survey. The questionnaire was designed in a multi-stage approach which allowed the UR to provide regular feedback on development of the questionnaire to ensure the content met its objectives and provided insightful information from which to draw policy implications. A short pilot was conducted prior to implementation of the main survey fieldwork. This was to ensure that the survey questions were easily understood and that the survey itself was of the intended average duration. No significant changes were required following this process.

Sample design

Survey sample design is critical to ensuring the robustness, reliability, representativeness, and replicability of the research. As this is a tracker study, it is also important that there is consistency in the sampling approach over time so that future comparison of the data can be drawn.

Sampling frame

The sampling frame for this study includes all non-domestic energy consumers. Table 1 shows the current structure of VAT registered organisations in Northern Ireland from published government sources².

² <https://www.nisra.gov.uk/publications/historical-data-tables-idbr>

Table 1: Number of businesses in NI by employee size and sector, IDBR 2019

Broad Industry Group	Total	Percentage
Agriculture, forestry & fishing	18,520	25%
Production	5,235	7%
Construction	10,515	14%
Motor trades	2,650	4%
Wholesale	3,255	4%
Retail	6,065	8%
Transport & storage (inc. postal)	2,475	3%
Accommodation & food services	4,145	5%
Information & communication	2,040	3%
Finance & insurance	1,250	2%
Property	2,390	3%
Professional, scientific & technical	6,025	8%
Business administration and support services	2,745	4%
Public administration and defence	50	0%
Education	675	1%
Health	2,810	4%
Arts, entertainment, recreation and other services	4,640	6%
All Industries	75,490	100%
Employee size band	Total	Percentage
0 to 9	67280	89%
10 to 49	6530	9%
50 to 249	1370	2%
250 plus	310	0%
All sizes	75490	100%
Location	Total	Percentage
Urban	31645	42%
Rural	43845	58%
All locations	75490	100%
District council area	Total	Percentage
Antrim and Newtownabbey	4,175	6%
Ards and North Down	4,755	6%
Armagh City, Banbridge and Craigavon	8,715	12%
Belfast	10,705	14%
Causeway Coast and Glens	6,075	8%
Derry City and Strabane	5,260	7%
Fermanagh and Omagh	8,200	11%
Lisburn and Castlereagh	4,855	6%
Mid and East Antrim	4,950	7%
Mid Ulster	9,050	12%
Newry, Mourne and Down	8,745	12%
Northern Ireland	75,490	100%

A stratified sampling approach was implemented to provide sufficient numbers for subgroup analysis. This involved oversampling of larger non-domestic consumers, with the full data set weighted at the analysis stage to be representative of the Northern Ireland business population

by business size. The table below illustrates the quotas set for this study for employee size band and broad industry group:

Table 2: Sample stratification

Employee size band	Total
0 to 9	250
10 to 49	150
50 plus	100
All sizes	500
Broad Industry Group	
Manufacturing, motor trades	80
Construction	80
Professional and business services	110
Leisure, hotel and catering	50
Retail/distribution/other services	80
Public admin	50
Community and voluntary	50
All sectors	500

Quotas were also set for District Council and Urban/Rural location based on the Inter-Departmental Business Register (2019).

For the purposes of the survey, business sectors were defined according to 2-digit SIC code classifications. Public sector bodies (such as schools, GP surgeries etc) and the community and voluntary sector were included in the survey, but the agriculture sector was excluded due to its specific energy requirements. Agricultural businesses were screened out at the beginning of the survey. It should be noted that, in order to ensure sufficient numbers of main gas consumers for subgroup analysis, responses from the Greater Belfast area were overrepresented in the final results. This is reflective of the maturity of the natural gas distribution network in Northern Ireland.

Respondent demographics

Sector, size and location

The table below indicates the final unweighted and weighted survey responses achieved by sector, size, and location. Unweighted bases are shown throughout the report. Percentage figures are based on weighted survey data.

STRATIFICATION VARIABLE		UNWEIGHTED		WEIGHTED	
		NO.	%	NO.	%
SIZE	50 or more employees	96	19%	10	2%
	10 to 49 employees	174	35%	45	9%
	9 or fewer employees	230	46%	445	89%
SECTOR	Construction	80	16%	80	16%
	Leisure, hotels & catering	58	12%	43	9%
	Manufacturing & production	83	17%	77	15%
	Professional services	110	22%	136	27%
	Retail, distribution & other service	81	16%	98	20%
	Public administration	47	9%	27	5%
	Community & voluntary	41	8%	40	8%
LOCATION	Greater Belfast	163	33%	145	29%
	Outside Greater Belfast	337	67%	355	71%
URBAN/RURAL	Urban	294	59%	292	58%
	Rural	164	33%	172	34%
	Both (Mixed across sites)	42	8%	36	7%
TOTAL		500	100%	500	100%

Implementation

Survey questionnaires were 'scripted' onto a specialised CATI (Computer Assisted Telephone Interviewing) system to facilitate optimum flow and accuracy during interviewing. All interviewers were fully briefed on the specific requirements of the project at hand prior to commencement.

Data cleaning and quality assurance

Telephone interviewing was quality assured in line with the **IQCS** (Interviewer Quality Control Scheme). As all interviewing was conducted in-house, consultants worked closely with interviewers and supervisors to monitor and assure quality responses throughout the fieldwork period.

On completion of interviewing, data integrity and validation checks were conducted on the data file. This included checking bases were correct, that filter questions had been adhered to, ensuring the data for each variable fell within the expected range, and checking outlier data for accuracy. Following this process of data cleaning, analysis was conducted on the data.

Appendix B - Questionnaire

Utility Regulator Non-domestic Insight Tracker

ASK FOR MD/CEO/OWNER/ENERGY MANAGER

Good morning/afternoon. My name is _____ and I am calling on behalf of the market research company, Perceptive Insight. We are conducting a survey for NI's Utility Regulator on the experiences of businesses and other organisations (such as public sector and charities) as consumers of the gas and electricity markets. The Utility Regulator is the public body responsible for regulating the electricity and gas industries in Northern Ireland.

We would appreciate if we could have 10-15 minutes of your time to answer some questions. Please be assured that this is not a sales call and all of your responses are confidential. All interviews are conducted in accordance with Market Research Society Code of Conduct, and all data collected is held in compliance with the General Data Protection Regulation 2018 (GDPR). Your call may be monitored for training and quality purposes.

RECORD COMPANY ID NUMBER

Section A : Demographics

A1 Before we start, are you happy to proceed with the survey and for your answers to be collected?

- Yes
 No - Thank and close

A2 Can I just check, do you have a business mains gas/or mains electricity contract, which has been arranged by yourself, someone else in the business, or an energy broker?

- Yes
 No – domestic or residential tariff/ contract - CLOSE
 No – contract arranged by landlord or building management company - CLOSE
 Don't have an energy contract - CLOSE
 Don't know - CLOSE
 Refused - CLOSE

A3 Can I confirm, are you solely or jointly responsible for arranging your business's energy contracts or paying these bills?

- Yes
 No – Ask to speak to the person who has responsibility. If unavailable, thank and close.

A4 How many sites are you responsible for within Northern Ireland?

- 1
- 2
- 3
- 4
- 5 or more

A5 Can you tell me how many employees this represents?

IF THEY EMPLOY PART-TIME STAFF ASK THEM TO ESTIMATE THE NUMBER OF FULL TIME EQUIVALENTS

- 1 to 2
- 3 to 9
- 10 to 20
- 21 to 49
- 50 to 100
- 101 to 249
- 250 or more
- Don't know

A6 Which of the following sectors best describes the main activity of your business?

- Agriculture – THANK AND CLOSE
- Manufacturing – Food and drink
- Manufacturing – Textiles and clothing
- Manufacturing- Electronics and software
- Manufacturing – Chemicals and pharmaceuticals
- Manufacturing – other manufacturing
- Construction
- Service – Transport/ communications
- Service – Finance, banking, insurance
- Service – IT related activity
- Service – Business services
- Service – hotels, restaurants, bars and catering
- Service – Retail
- Service - Wholesale, distribution and logistics
- Service - other
- Public administration
- Health
- Education
- Community and voluntary
- Other

Other, please specify

A7 Can you tell me in which District Council Area your business is located? (*Tick all that apply based on the sites they are responsible for*).

- Antrim and Newtownabbey
- Ards and North Down
- Armagh City, Banbridge and Craigavon
- Belfast
- Causeway, Coat and Glens
- Derry City and Strabane
- Fermanagh and Omagh
- Lisburn and Castlereagh
- Mid and East Antrim
- Mid Ulster
- Newry, Mourne and Down

A8 Do you consider the place(s) where your business is based to be in an urban or rural location?

- Urban
- Rural
- Both

Section B: Type and amount of energy use

ASK ALL

B1 Which of the following energy types are installed in your business? *(select all that apply)*

- Electricity
- Gas (mains)
- Gas (bottled/cylinder)
- Oil
- Coal
- Renewables
- Self-generated
- Other

Other, please specify

ASK ALL

B2a Who is your electricity supplier? (That is, the company you pay your electricity bill to)

- Budget Energy
- Click Energy
- Energia
- Electric Ireland
- Firmus Energy
- LCC Power Limited
- Power NI
- SSE Airtricity
- Naturgy
- 3T Power
- Go Power
- Other (please specify)
- Not sure*

Other, please specify

ASK IF B1 = 2

B2b Who is your gas supplier? (For mains gas only. That is, the company you pay your gas bill to)

- SSE Airtricity Gas Supply (NI)
- Firmus Energy
- Electric Ireland
- Naturgy
- Go Power
- Flogas
- Phoenix
- Other (please specify)
- Not sure*

Other (please specify)

Section C: Billing and affordability

ASK ALL

C1a Thinking about the sites you are responsible for, including VAT, approximately how much has your business spent on **electricity** in the last 12 months?

DO NOT READ OUT - IF NOT SURE ASK FOR ESTIMATE

- Less than £500
- Between £500 and £1,000
- Between £1,001 and £2,500
- Between £2,501 and £5,000
- Between £5,001 and £6,400
- Between £6,401 and £10,000
- Between £10,001 and £15,000
- Between £15,001 and £25,000
- Between £25,001 and £50,000
- More than £50,000
- Don't know*
- Refused*

C1b And approximately what proportions of your total outgoings/ business costs does that figure represent?

DO NOT READ OUT

- Up to 4%
- Between 5% and 9%
- Between 10% and 19%
- Between 20% and 29%
- Between 30% and 39%
- Between 40% and 49%
- 50% or more
- Don't know*

ASK IF B1 = 2

C2a Thinking about the sites you are responsible for, including VAT, approximately how much has your business spent on **gas** in the last 12 months?

(For mains gas only)

DO NOT READ OUT - IF NOT SURE ASK FOR ESTIMATE

- Less than £500
- Between £500 and £1,000
- Between £1,001 and £2,500
- Between £2,501 and £5,000
- Between £5,001 and £6,400
- Between £6,401 and £10,000
- Between £10,001 and £15,000
- Between £15,001 and £25,000
- Between £25,001 and £50,000
- More than £50,000
- Don't know*
- Refused*

ASK IF B1=2

C2b And approximately what proportions of your total outgoings/ business costs does that figure represent?

DO NOT READ OUT

- Up to 4%
- Between 5% and 9%
- Between 10% and 19%
- Between 20% and 29%
- Between 30% and 39%
- Between 40% and 49%
- 50% or more
- Don't know*

ASK ALL

C3 How do you think the cost of energy in Northern Ireland compares to the Republic of Ireland and to Great Britain?

NI is...

	Significantl y cheaper	Slightly cheaper	Similar costs	Slightly more expensive	Significantl y more expensive	<i>Don't know</i>
Republic of Ireland	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Great Britain	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

ASK ALL

C4a What type of contract does your business have for **electricity**?

- Deemed rate
- Rollover
- Fixed rate
- Variable rate
- Pass through
- Various across different sites
- Other (please specify)
- Don't know*

Other, please specify

ASK IF B1 = 2

C4b What type of contract does your business have for **gas**?

(For mains gas only)

- Deemed rate
- Rollover
- Fixed rate
- Variable rate
- Pass through
- Other (please specify)
- Don't know*

Other, please specify

ASK ALL

C5a Which of the following best describes your business's **electricity** tariff?

- Standard variable tariff (the suppliers default tariff)
- A promotional tariff (e.g. fixed price for a set amount of time, a promotional tariff with discount for a set amount of time, etc.)
- Public sector tendering process for multiple sites
- Other (please specify)
- Don't know*

Other, please specify

ASK IF B1 = 2

C5b Which of the following best describes your business's gas tariff?

(For mains gas only)

- Standard variable tariff (the suppliers default tariff)
- A promotional tariff (e.g. fixed price for a set amount of time, a promotional tariff with discount for a set amount of time, etc.)
- Public sector tendering process for multiple sites
- Other (please specify)
- Don't know

Other, please specify

Section D: Understanding of the energy market

ASK ALL

D1a Did your **electricity** supplier provide you with a key contact person/ account manager to deal with your energy queries?

- Yes
- No
- Don't know

ASK IF B1 = 2

D1b Did your **gas** supplier provide you with a key contact person/ account manager to deal with your energy queries?

(For mains gas only)

- Yes
- No
- Don't know

ASK ALL

D2a How well do you know your **electricity** supplier (e.g. the service they offer, what discounts they have, if you can switch to another supplier and how?)

- Good knowledge
- Some knowledge
- Little knowledge
- Very limited knowledge

ASK IF B1 = 2

D2b How well do you know your **gas** supplier (e.g. the service they offer, what discounts they have, if you can switch to another supplier and how?)

(For mains gas only)

- Good knowledge
- Some knowledge
- Little knowledge
- Very limited knowledge

ASK ALL

D3 To what extent, if it all, are you aware of each of the following?
(These statements apply to **both** gas and electricity)

	Not at all aware	Somewhat aware	Completely aware
Your business can choose between multiple energy suppliers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Your business can choose between several tariff types	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

ASK ALL

D4 When it comes to the following, which have 'improved,' 'not changed' or 'been made worse' due to increased choice of electricity and gas suppliers in NI?

	Improved	No change	Been made worse	Don't know
Cost of energy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Service provided	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tariff options available	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Responsiveness of suppliers to customer needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Suppliers which suit individual business needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Section E: Switching

E1 How easy or difficult do you believe it is to compare deals for the following?
Please use a scale of 1 to 5 where 1 is very difficult and 5 is very easy.

	1 - Very difficult	2	3	4	5 - Very easy	Don't know
Electricity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gas (For mains gas only)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

ASK ALL

E2 Are you aware of the energy price comparison tool provided by the Consumer Council of NI?

- Yes, and I have used it
- Yes, but never used it
- No

E3 How many times, if at all, has your business switched supplier in the last 5 years?

	Never	Once	2 or 3 times	4 or more times	Don't know
Electricity supplier	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gas supplier (For mains gas only)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

ASK IF E3a=1

E4aa What is the main reason the business has never switched **electricity** supplier?

- Didn't realise I could switch
- Happy with current service
- Feel I am on the cheapest option
- Reputation of the supplier is better than other suppliers
- Wouldn't know how to
- It is too difficult to switch
- Too busy / time consuming
- New business / premises
- Not aware of the options
- Other (please specify)
- Not sure

Other, please specify

ASK IF E3a=1

E4ab Are there any other reasons the business has never switched **electricity** supplier?

- Didn't realise I could switch
- Happy with current service
- Feel I am on the cheapest option
- Reputation of the supplier is better than other suppliers
- Wouldn't know how to
- It is too difficult to switch
- Too busy / time consuming
- New business / premises
- Not aware of options
- Other (please specify)
- No other reasons
- Not sure

Other, please specify

ASK IF B1=2 AND E3b=1

E4ba What is the main reason the business has never switched **gas** supplier?

(For mains gas only)

- Didn't realise I could switch
- Happy with current service
- Feel I am on the cheapest option
- Reputation of the supplier is better than other suppliers
- Wouldn't know how to
- It is too difficult to switch
- Too busy / time consuming
- New business / premises
- Not aware of options
- Other (please specify)
- Not sure*

Other, please specify

ASK IF B1=2 AND E3b=1

E4bb Are there any other reasons the business has never switched **gas** supplier?

(For mains gas only)

- Didn't realise I could switch
- Happy with current service
- Feel I am on the cheapest option
- Reputation of the supplier is better than other suppliers
- Wouldn't know how to
- It is too difficult to switch
- Too busy / time consuming
- New business / premises
- Not aware of options
- Other (please specify)
- No other reasons
- Not sure*

Other, please specify

ASK IF E3a = 2~4

E5a Thinking of the last time you switched **electricity** supplier (or more recently compared supplier/tariffs), what were your main reasons for doing so? *(select all that apply)*

- Felt business was overpaying
- Saw a promotional offer with another supplier
- Advised to by broker/consultant
- Saw a media advertisement (e.g. TV advert) from another supplier
- Experienced poor customer service
- Moved premises
- Sought a better deal
- Approached by supplier
- Contract was up for renewal
- Other (please specify)
- Not sure*

Other, please specify

ASK IF B1a = 2 AND E3b = 2~4Appr

E5b Thinking of the last time you switched gas supplier (or more recently compared supplier/tariffs), what were your main reasons for doing so?

(Select all that apply)

(For mains gas only)

- Felt business was overpaying
- Saw a promotional offer with another supplier
- Advised to by broker/consultant
- Saw a media advertisement (e.g. TV advert) from another supplier
- Experienced poor customer service
- Moved premises
- Sought a better deal
- Approached by supplier
- Contract was up for renewal
- Other (please specify)
- Not sure*

Other, please specify

E6 How did you switch from your previous...

	Via the telephone	Via the internet	Approach ed by a broker	Approach ed by the supplier	Tendered to suppliers	Other	Don't know
Electricity supplier	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gas supplier	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other, please specify (electricity supplier)	<input type="text"/>						
Other, please specify (gas supplier)	<input type="text"/>						

ASK IF E3a= 2~4

E7a Overall was the experience of switching **electricity** supplier positive, negative or neutral in relation to the following?

Please use a scale of 1 to 5 where 1 is very negative and 5 is very positive.

	1 - Very negative	2	3	4	5 - Very positive	Not sure
Price/value for money?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ease of switching?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality of service (from 1st bill onwards)?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

ASK IF E3b= 2~4

E7b Overall was the experience of switching **gas** supplier positive, negative or neutral in relation to the following?

Please use a scale of 1 to 5 where 1 is very negative and 5 is very positive.

	1 - Very negative	2	3	4	5 - Very positive	Not sure
Price/value for money?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ease of switching?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality of service (from 1st bill onwards)?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

E8 How likely is the business to switch supplier in the next 12 months?

Please use a scale of 1 to 5 where 1 is not at all likely and 5 is very likely.

	1 - Not at all likely	2	3	4	5 - Very likely	Don't know
Electricity supplier	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gas supplier	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

ASK ALL

E9 Are you aware that your energy supplier has to meet certain minimum standards of customer service?

(For example, in relation to complaints handling and clarity of contract terms)

- Not at all aware
- Somewhat aware
- Completely aware

Section F: Communications and methods of contact

F1 How do you receive your...?

	In the post	Via email or online	Through an app	Other (please specify)	Don't know
Electricity bill?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gas bill?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other, please specify (electricity bill)	<input type="text"/>				
Other, please specify (gas bill)	<input type="text"/>				

ASK ALL

F2 When you receive correspondence from your energy supplier (e.g. annual statement, bill, price increase letter) do you...?

- Read it and understand all of it
 Read it and understand most of it
 Read it but do not understand it
 Only glance at it
 Don't read it
 Not sure

ASK ALL

F3 Are you aware of and have you used any of the following sources of information and advice on energy matters?

	Not aware of	Aware of	Have used
Invest NI	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Federation of Small Businesses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local Council	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Confederation of British Industry (CBI)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other, please specify	<input type="text"/>		

F4 How would you describe your experience of interacting with your energy supplier?

Please use a scale of 1 to 5 where 1 is very negative and 5 is very positive.

	1 - Very negative	2	3	4	5 - Very positive	Don't know
Electricity supplier	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gas supplier (For mains gas only)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Section G: Complaint handling

G1 Have you complained to your previous or current supplier in the last 5 years?

	Yes	No	Don't know
Electricity supplier	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gas supplier (For mains gas only)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

ASK WHERE THEY HAVE MADE A COMPLAINT AT G1a

G2a How quickly was your most recent complaint to your **electricity** supplier resolved?

- Never and not expecting it to be
- On-going
- Within a day
- Within two weeks
- Within a month
- Within 2-3 months
- Took longer than 3 months to resolve
- Not sure

ASK WHERE THEY HAVE MADE A COMPLAINT AT G1a

G2b How satisfied were you with the outcome of your most recent complaint to your **electricity** supplier?

- Very dissatisfied
- Dissatisfied
- Neither satisfied nor dissatisfied
- Satisfied
- Very satisfied
- Not sure

ASK WHERE THEY HAVE MADE A COMPLAINT AT G1b

G3a How quickly was your most recent complaint to your **gas** supplier resolved?

- Never and not expecting it to be
- On-going
- Within a day
- Within two weeks
- Within a month
- Within 2-3 months
- Took longer than 3 months to resolve
- Not sure

ASK WHERE THEY HAVE MADE A COMPLAINT AT G1b

G3b How satisfied were you with the outcome of your most recent complaint to your **gas** supplier?

- Very dissatisfied
- Dissatisfied
- Neither satisfied nor dissatisfied
- Satisfied
- Very satisfied
- Not sure

ASK IF G1a and G1b≠1

G4 Have you ever wanted to complain to your current or previous gas/electricity supplier?

- Yes - I wanted to but wasn't sure how to
- Yes – I wanted to and knew how to but never got round to it
- Yes – I wanted to and knew how to, but I didn't think it would make a difference
- No
- Not sure

ASK IF G1a AND G1b≠1

G5 If you had a concern relating to your gas/electricity supplier, would you know how to go about making a complaint?

- Yes
- No
- Not sure

Section H: Satisfaction

H1 How satisfied are you with the overall service you receive from your energy supplier. Please use a scale of 1 to 10, where 1 is very dissatisfied and 10 is very satisfied?

	1 - Very dissat isfied	2	3	4	5	6	7	8	9	10 - Very satisfi ed	Don't know
Electricity supplier	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gas supplier (For mains gas only)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

H2 To what extent do you trust your energy supplier to give you clear information and a fair price?

	1 - Do not trust at all	2	3	4	5	6	7	8	9	10 - Trust fully	Don't know
Electricity supplier	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gas supplier (For mains gas only)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

H3 How likely are you to recommend your energy supplier to a friend or colleague? Please use a scale of 1 to 10, where 1 is very unlikely and 10 is very likely.

	1 - Very unlike ly	2	3	4	5	6	7	8	9	10 - Very likely	Not sure
Electricity supplier	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gas supplier (For mains gas only)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Section I: Energy efficiency, renewables and decarbonisation

ASK ALL

I1 Has your business undertaken any energy efficiency measures in the last three years?

- Yes
 No
 Not sure

ASK IF I1=2

I2 Why has your business not taken any energy efficiency measures in the last three years?
(Select all that apply)

- Cannot afford the initial outlay
 Don't think they are needed
 Lack of information
 It would cause too much disruption
 These were already in the business premises
 Installed them more than three years ago
 Rented premises – have no control over structural changes
 Recently moved premises
 Planning on introducing measures
 Unsuitable (e.g. old building, location)
 Other (please specify)
 No reason
 Not sure

Other, please specify

ASK ALL

I3 How important is climate change to your business? Use a scale of 1 to 5, where 1 is not at all important and 5 is very important.

- 1 - Not at all important
 2
 3
 4
 5 - Very important
 Don't know

ASK ALL

I4 To what extent are you aware of the radical changes that are taking place in the energy sector driven by technology, climate change etc?

- Not at all aware
- Somewhat aware
- Completely aware

Section J: Special topics

ASK ALL

J1 How, if at all, has the impact of Covid-19 affected your energy usage?