

NIE Networks survey with non-domestic customers

Key findings report

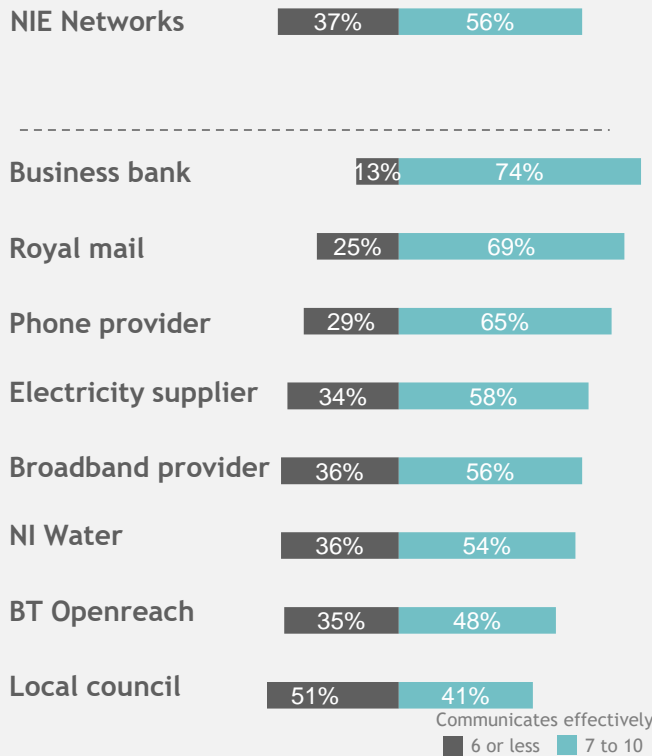
January 2020

RESULTS OF A 2019 SURVEY WITH BUSINESS CUSTOMERS

NIE NETWORKS' NET PROMOTER SCORE



PERCEPTIONS OF SERVICE PROVIDERS



19% are unsure of NIE Networks' role



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

RECENT EXPERIENCE WITH NIE NETWORKS

% who have experienced a planned power cut



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

% who have experienced an unplanned power cut

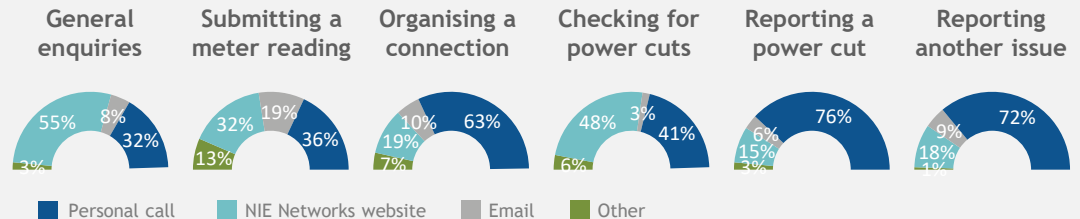


31% who said they have experienced an unplanned power cut within the same time period.

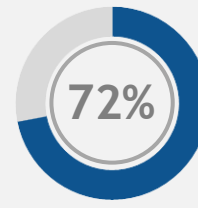


70% would like a notification card to inform them of planned power cuts. More than half (55%) stated this would be their first preference.

PREFERRED COMMUNICATION CHANNELS

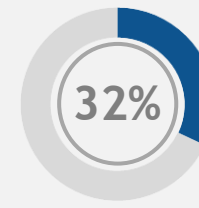


FUTURE NETWORKS



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

% of organisations agreeing



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

% of organisations with / planning to implement

This study was conducted by the independent research company:



Introduction & approach

Aim and approach

Aim

- In November 2019, NIE Networks commissioned Perceptive Insight to undertake a survey of businesses in Northern Ireland (a similar study was undertaken in 2015).
- The aim of the study was to:
 - Ascertain businesses' perceptions of different service providers, including NIE Networks;
 - Establish the extent to which respondents understand the role of NIE Networks;
 - Determine experience with and overall levels of satisfaction with NIE networks; Gain an understanding of businesses preferred methods of contact and communication channels; and
 - Identify level of intent to uptake low carbon technologies in the future.

Approach

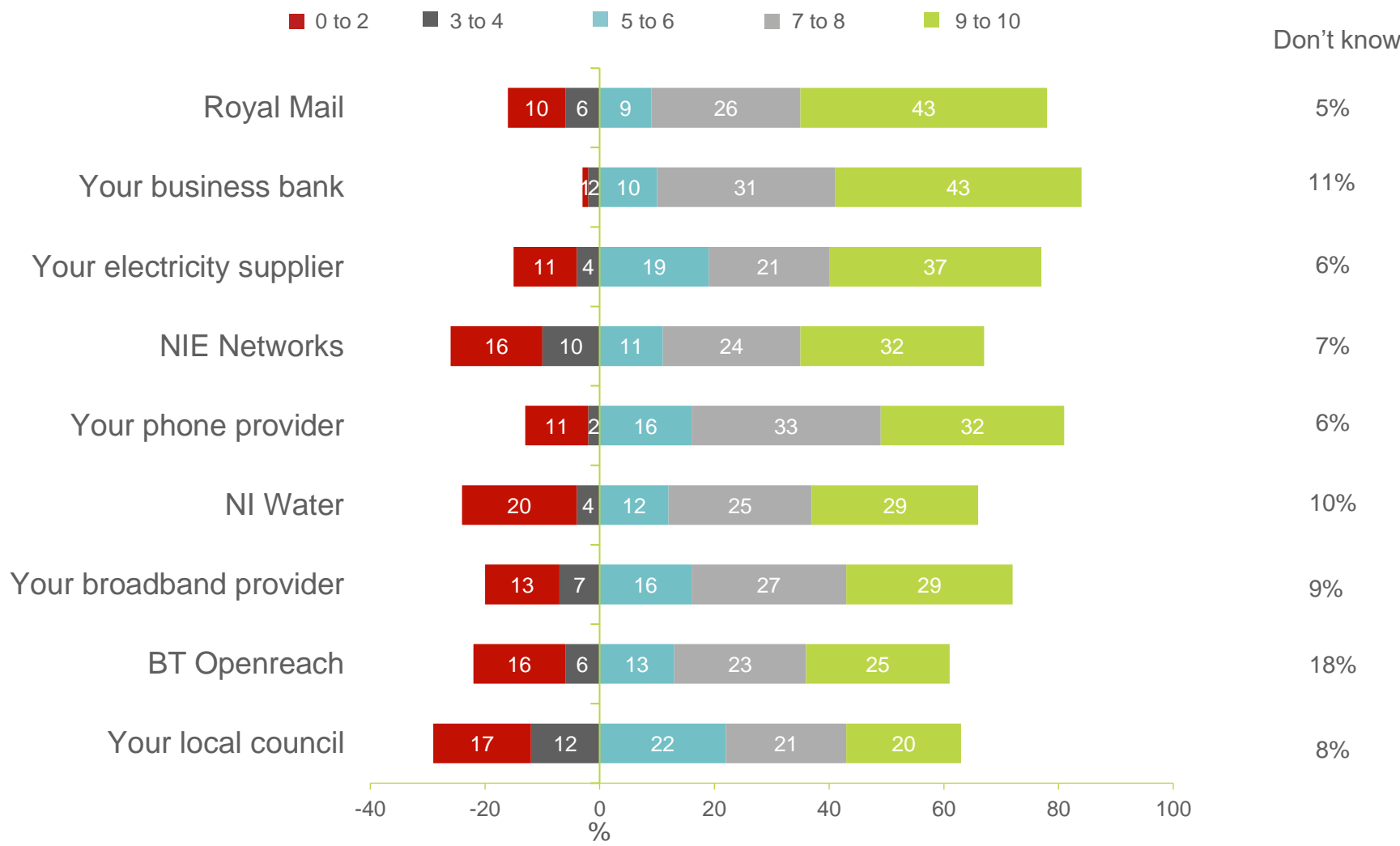
- Businesses were contacted by telephone to take part in the survey;
- A total of 213 interviews were conducted by between 4 November and 18 November 2019;
- Stratification by size and sector was applied to the data to ensure a range of business types were interviewed;
- Upon completion of the fieldwork, the data was weighted by business size to ensure representation; and
- Findings were analysed using Perceptive Insight's specialist survey software.



Perceptions of different service providers

A1 In relation to your organisation, how would you rate each of the following services?

Base 213: All respondents. Weighted data



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

A1 Rating scores

Base 213: All respondents. Weighted data

Rating:	Low scorers	Neutrals	High scorers
	0 – 6	7 - 8	9 - 10
Royal Mail	25%	26%	43%
Your business bank	13%	31%	43%
Your electricity supplier	34%	21%	37%
NIE Networks	37%	24%	32%
Your phone provider	29%	33%	32%
NI Water	36%	25%	29%
Your broadband provider	36%	27%	29%
BT Openreach	35%	23%	25%
Your local council	51%	21%	20%

¹ Adapted from Net Promoter Score

² Due to rounding percentages add to 99%-101%

Views of NIE Networks

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

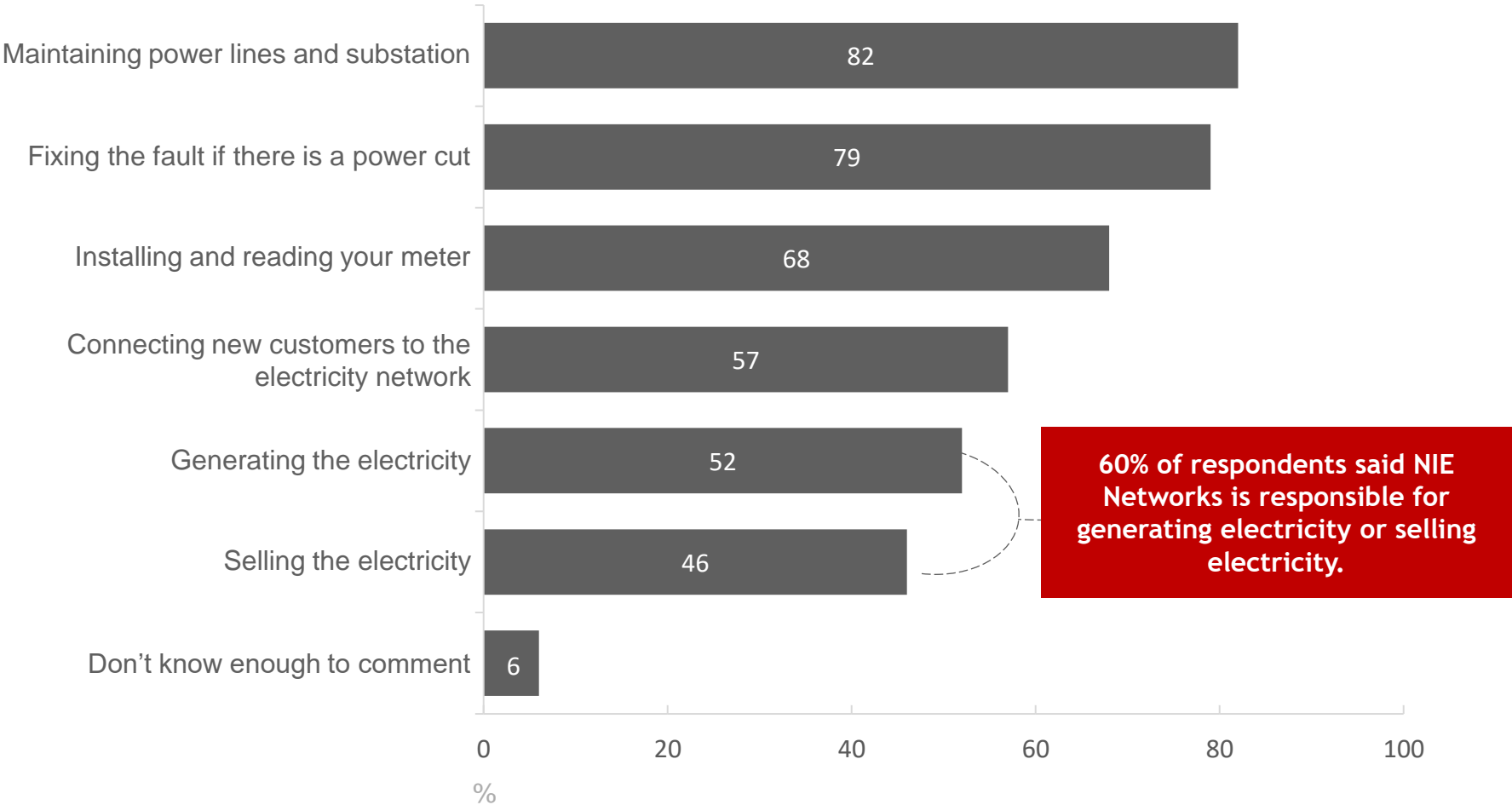
Base 213: All respondents. Weighted data

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



B2 Which of the following is NIE Networks responsible for? (Prompted response)

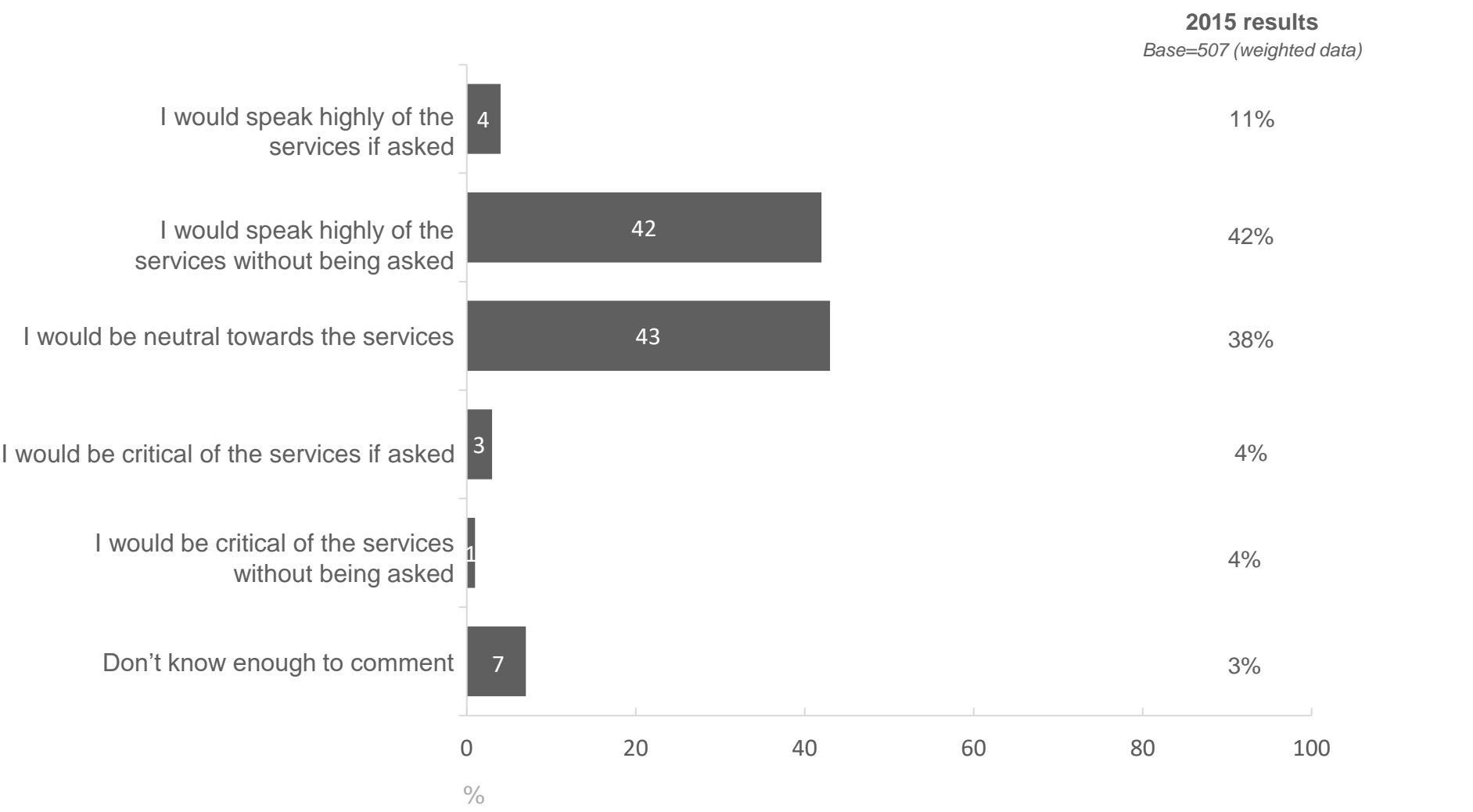
Base 213: All respondents. Weighted data



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

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

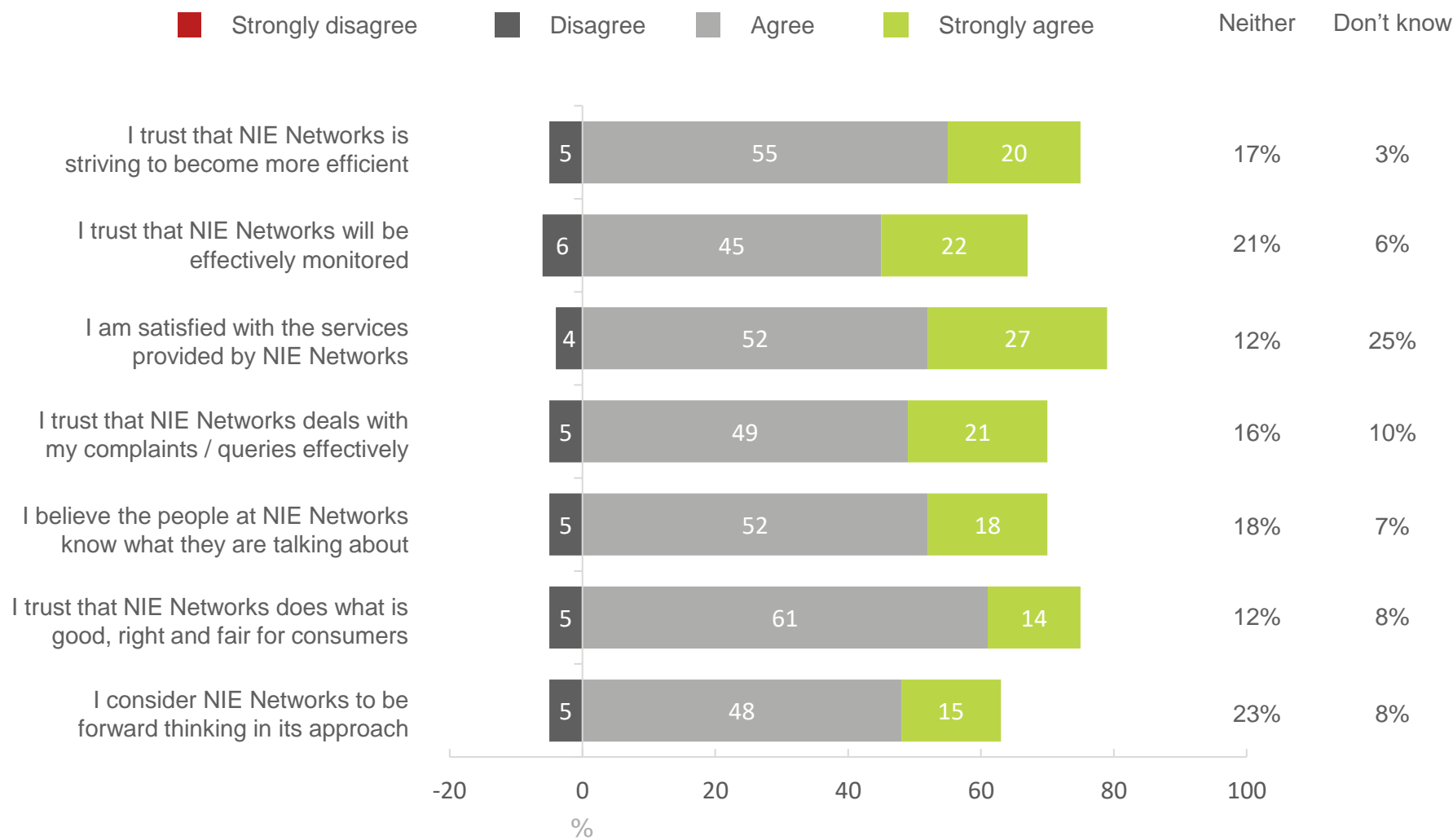
Base 213: All respondents. Weighted data



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

B4 To what extent do you agree or disagree with the following statements?

Base 213: All respondents. Weighted data

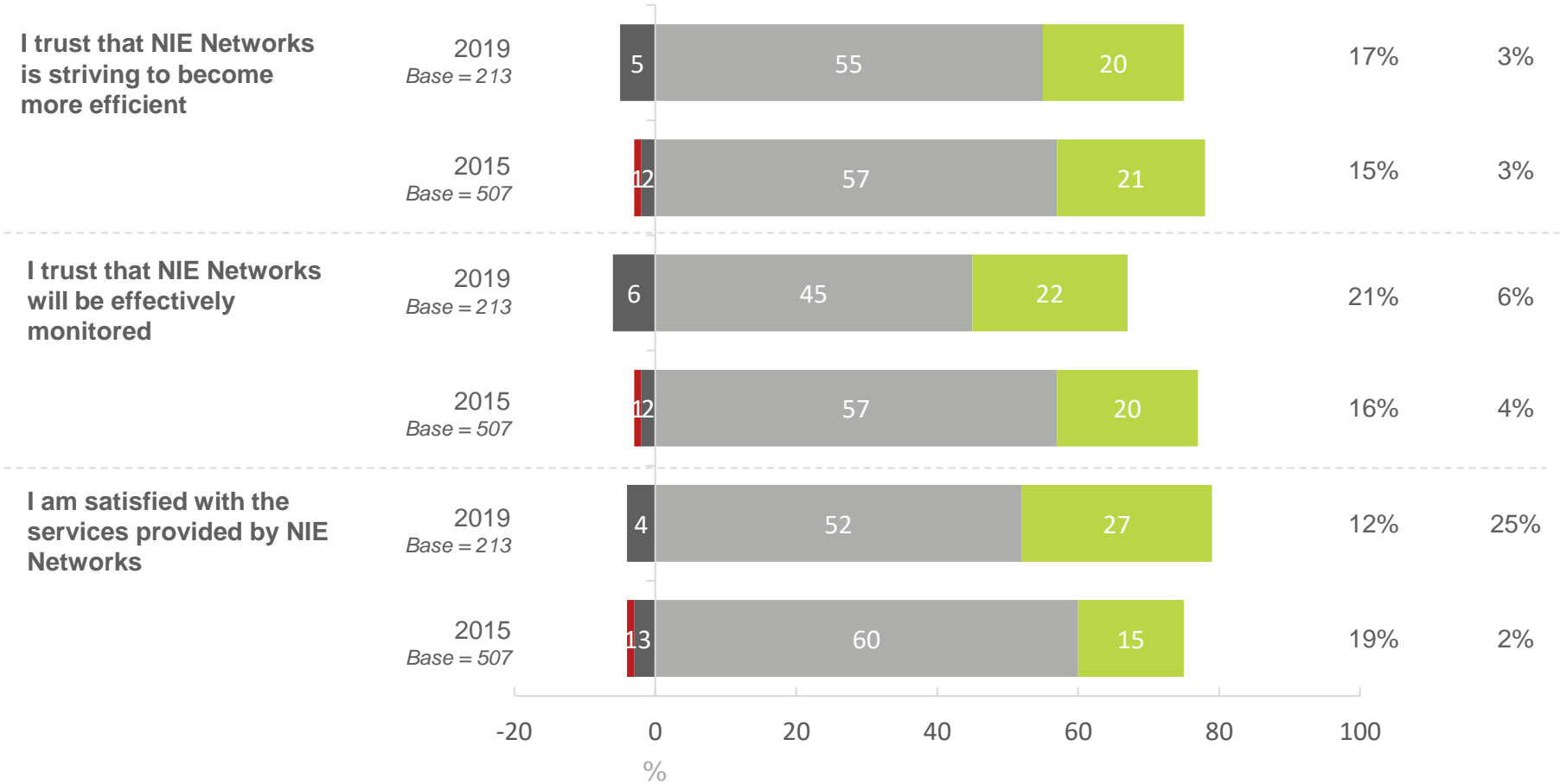


¹ Due to rounding percentages add to 99%-101%

B4 To what extent do you agree or disagree with the following statements?

Individual bases below. Weighted data

Strongly disagree Disagree Agree Strongly agree Neither Don't know

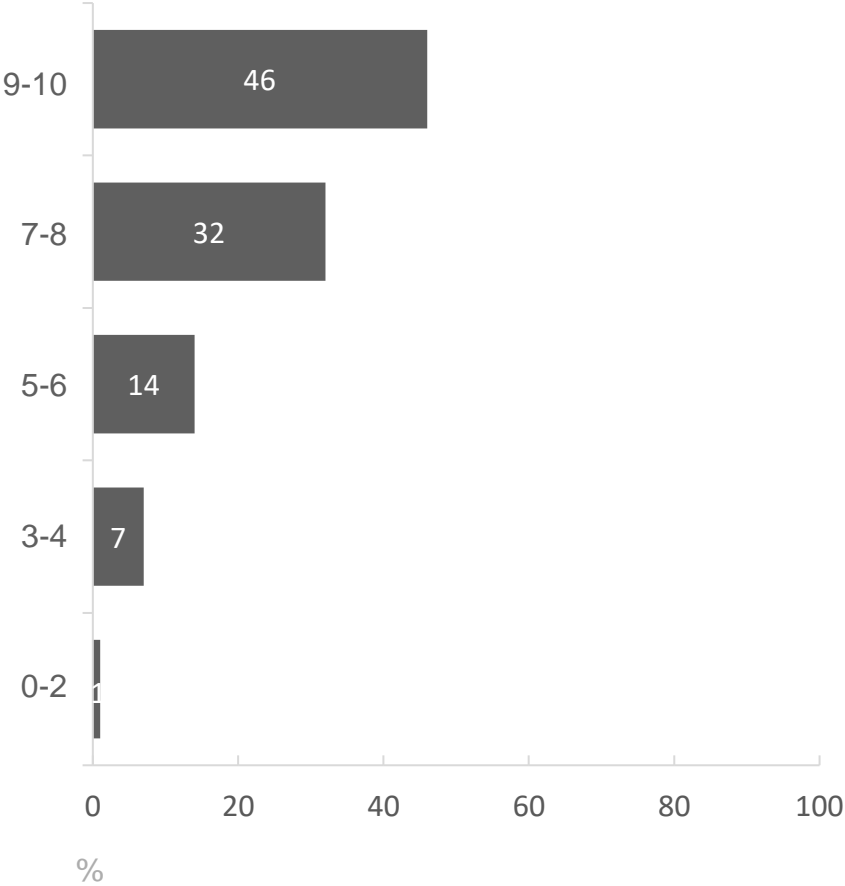


¹ Due to rounding percentages add to 99%-101%

Likelihood to recommend and NPS

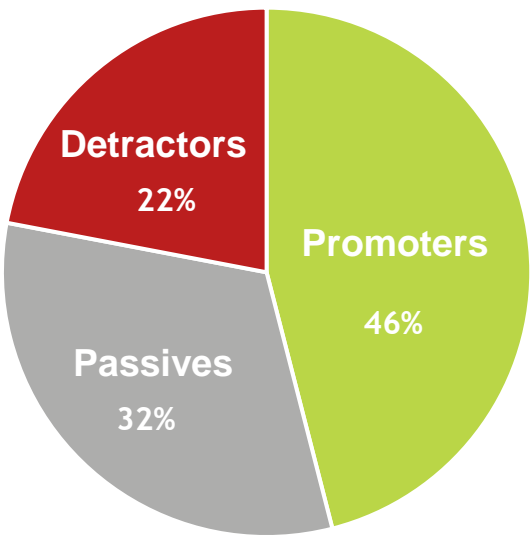
Base 213: All respondents. Weighted data

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



Net promoter score

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



NPS score = **24***

*This score may be impacted by low brand recognition. Whilst some have been identified as 'detractors', they may be real life 'passives'. Findings from B3, highlight few would be critical about NIE Networks (4%).

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

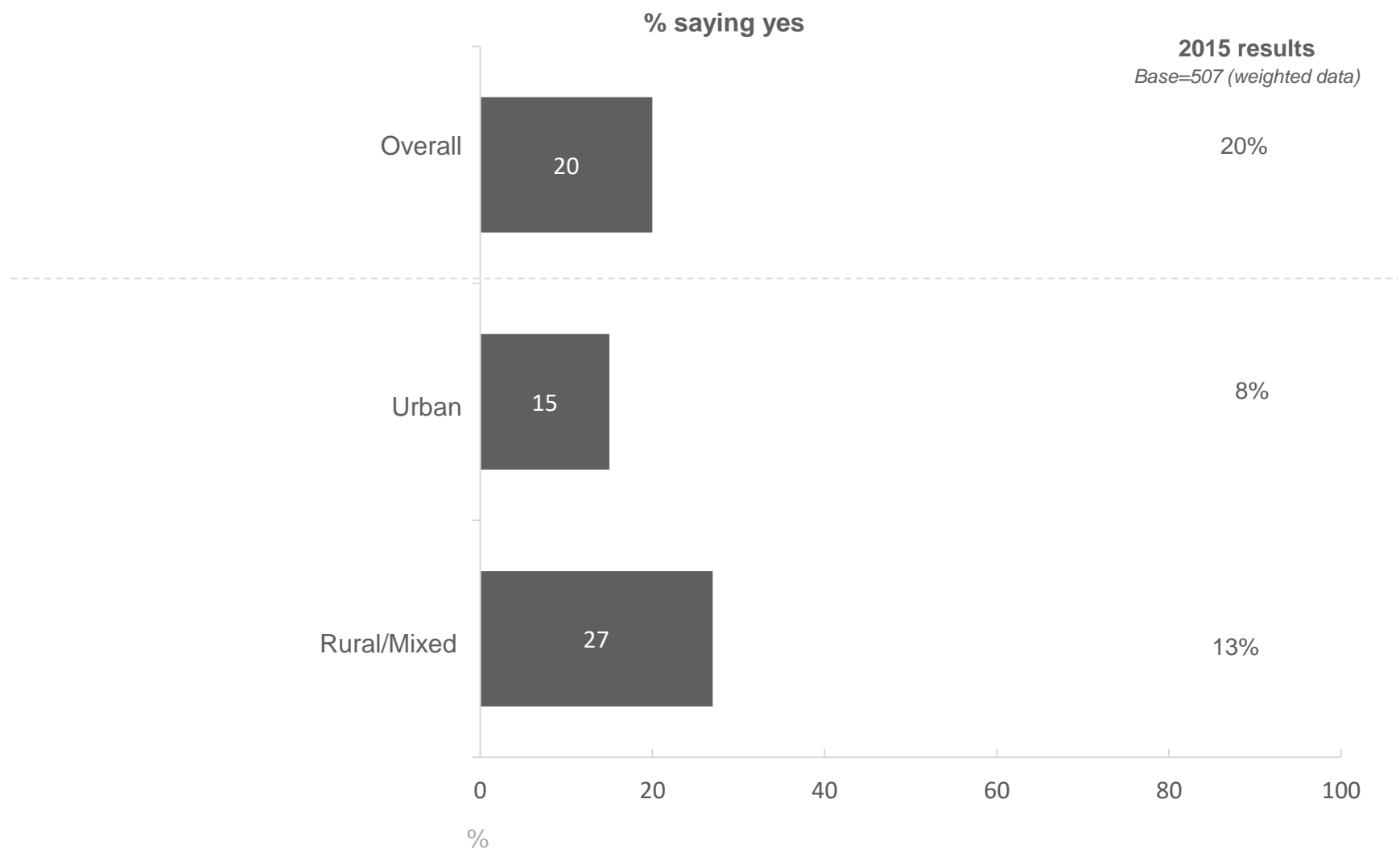
² Due to rounding percentages add to 99%-101%



Recent experience with NIE Networks

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

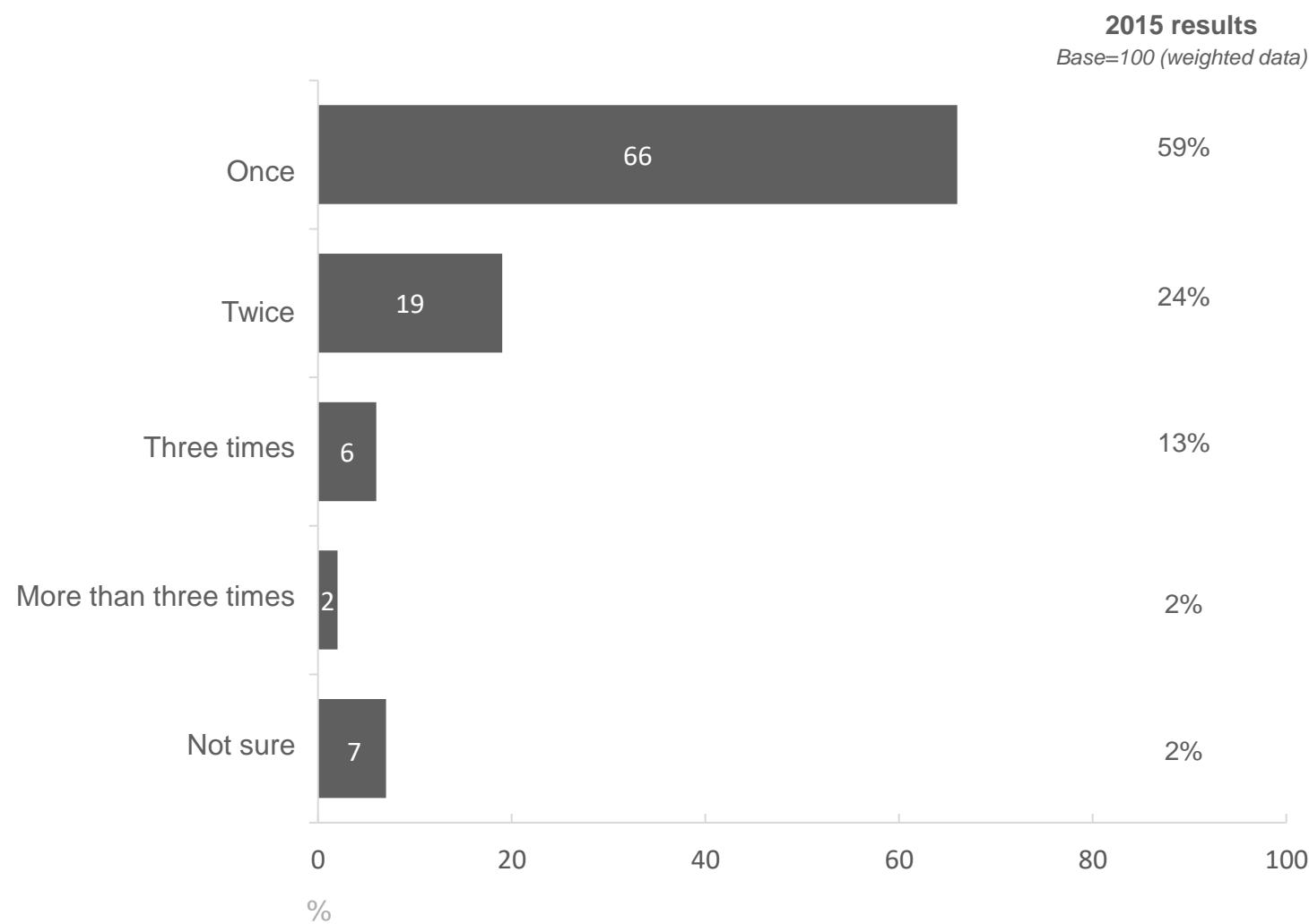
Base 213: All respondents. Weighted data



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

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

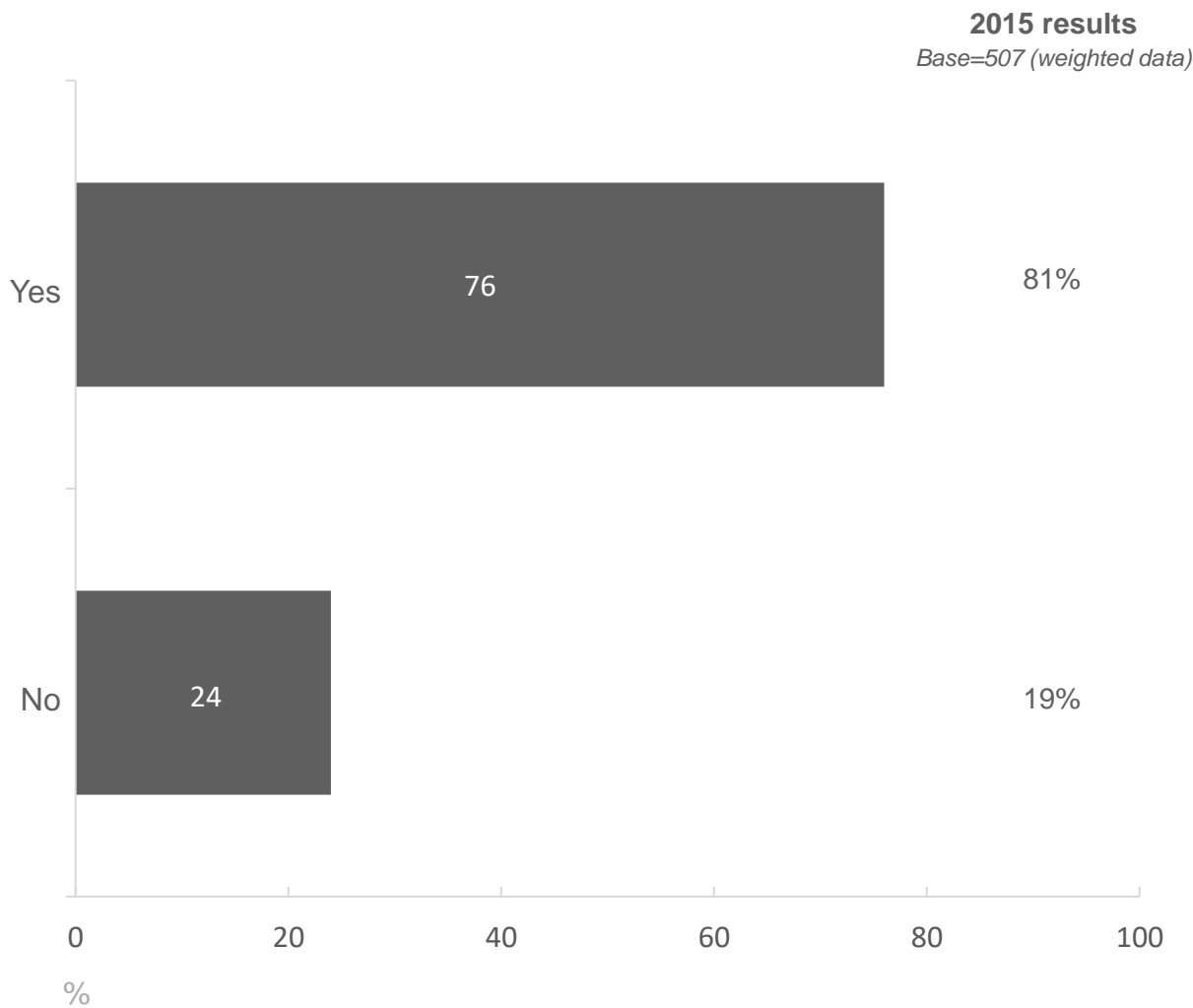
NB: Low base
Base 49/42 : Businesses that have experienced a planned power cut. Weighted data



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

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

Base 213: All respondents. Weighted data



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

C4 Which of the following are your most preferred and second most preferred way of being informed that a planned power cut is going to take place in your organisation?

Base 213: All respondents. Weighted data

	All preferences	1 st preference	2 nd preference
Notification card through your front door	70%	55%	14%
Telephone - personal	43%	17%	26%
Email	42%	15%	28%
Text message	26%	9%	17%
Letter	12%	1%	11%
Telephone - automated	3%	-	3%
In person	2%	-	2%
Power check on NIE Networks' website	1%	1%	-
NIE Networks' Facebook	-	-	-
NIE Networks' Twitter	-	-	-
Other (includes 'any method that is direct and prompt')	1%	1%	-

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

C4 Which of the following are your most preferred and second most preferred way of being informed that a planned power cut is going to take place in your organisation?

Individual bases below. Weighted data

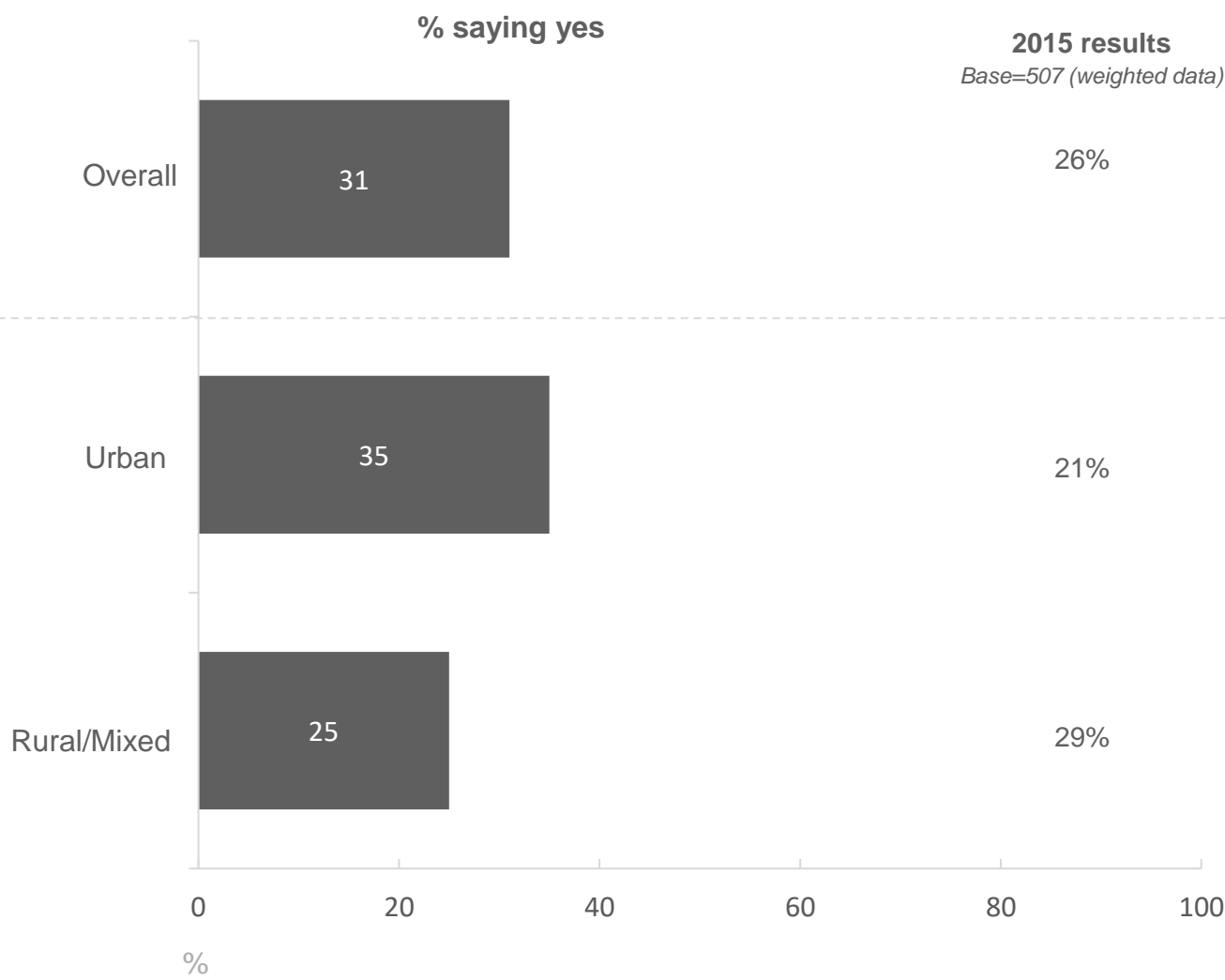
	1 st preference		2 nd preference	
	2019 Base = 213	2015 Base = 507	2019 Base = 213	2015 Base = 507
Notification card through your front door	55%	73%	14%	9%
Telephone - personal	17%	14%	26%	40%
Email	15%	8%	28%	27%
Text message	9%	1%	17%	7%
Letter	1%	3%	11%	9%
Telephone - automated	-	1%	3%	5%
In person	-	-	2%	-
Power check on NIE Networks' website [*]	1%	1%	-	1%
NIE Networks' Facebook	-	-	-	-
NIE Networks' Twitter	-	-	-	-
Other (includes 'any method that is direct and prompt)	1%	-	-	1%

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

^{*} Asked as 'NIE Website' in 2015

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

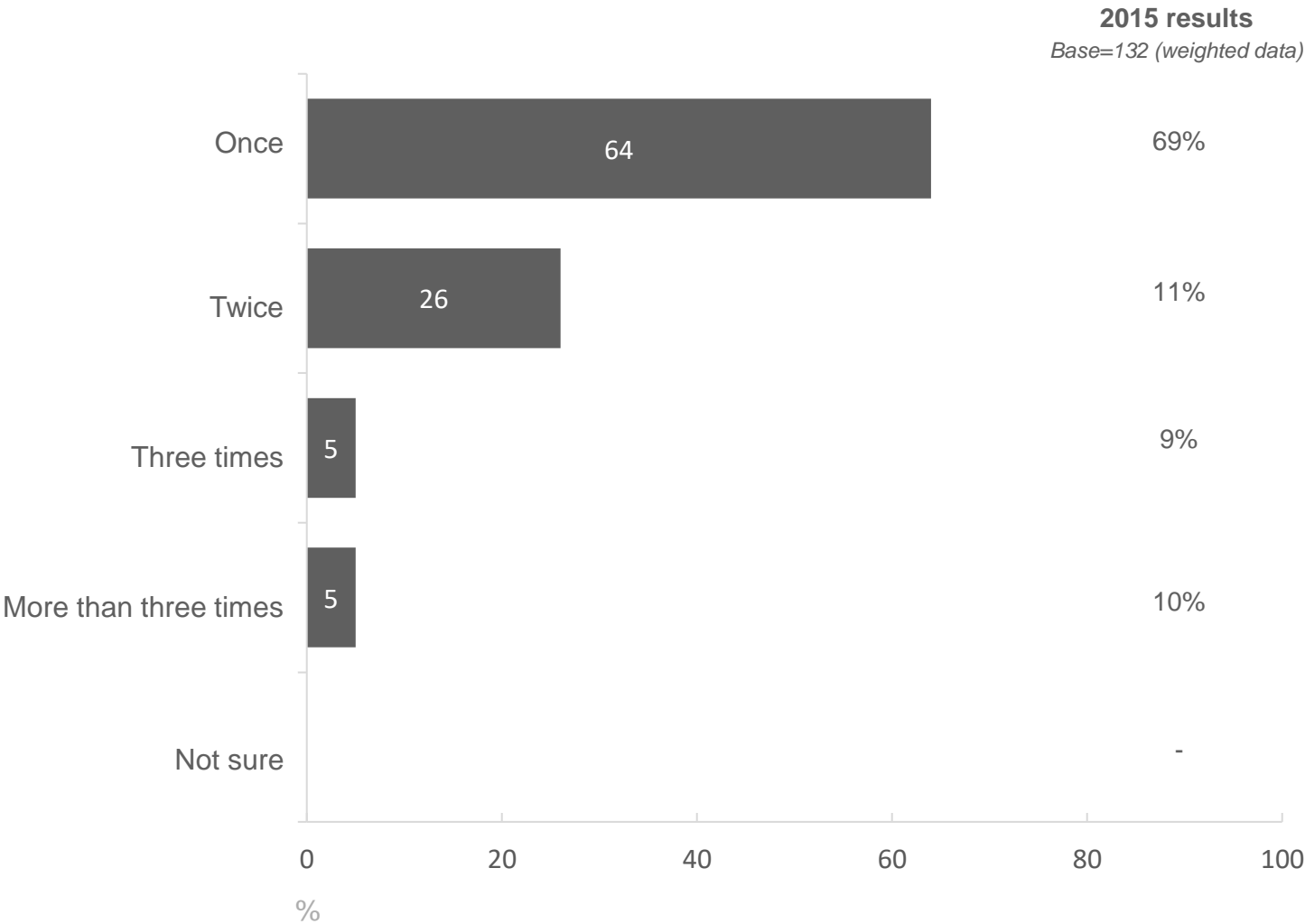
Base 213: All respondents. Weighted data



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

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

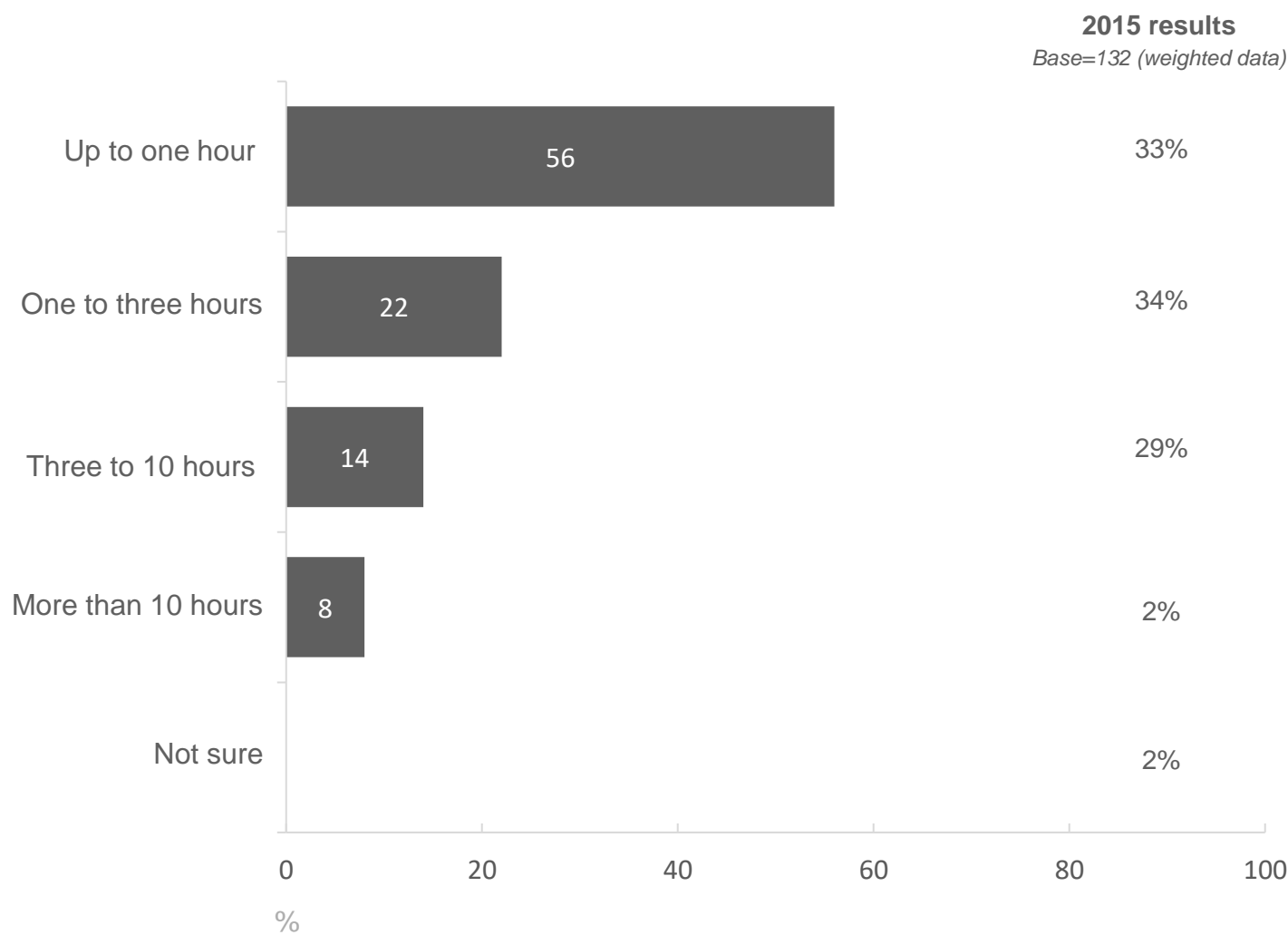
NB: Low base
Base 64/66: Businesses that have experienced an unplanned power cut. Weighted data



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

C7 In the last 12 months, what was the longest time you were without power due to an unplanned power cut?

NB: Low base
Base 64/66 : Businesses that have experienced an unplanned power cut. Weighted data



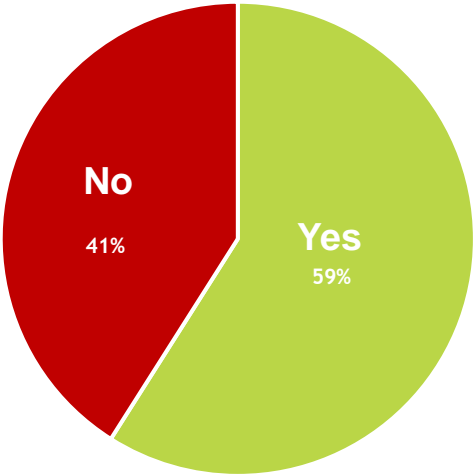
¹ Due to rounding percentages add to 99%-101%

Reporting of unplanned power cuts

NB: Low bases
Individual bases listed below. Weighted data

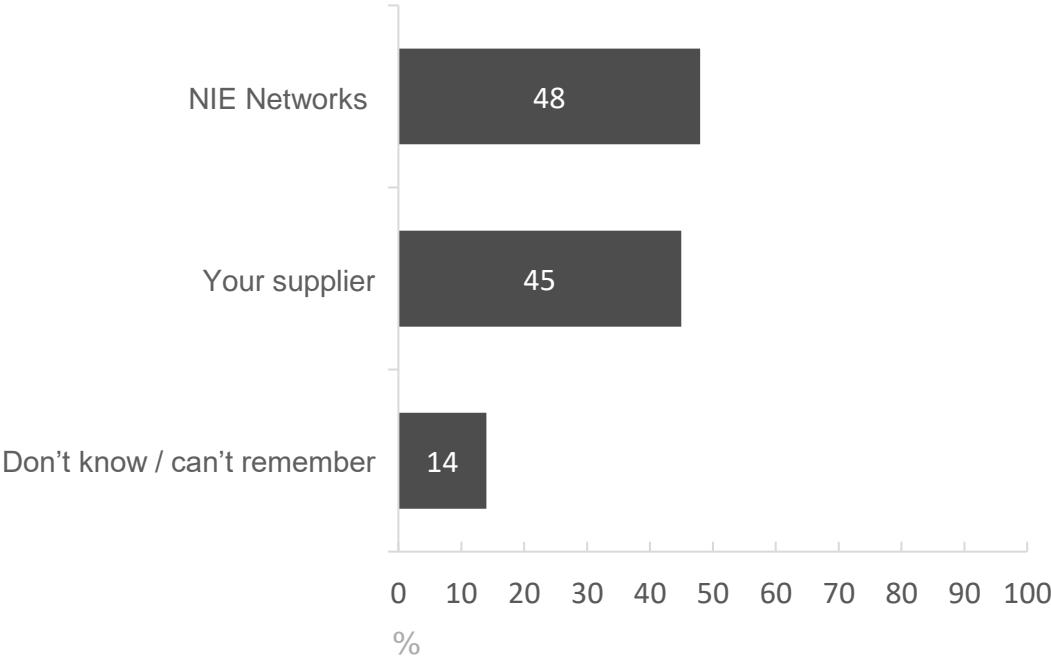
C8 Did you report any of these unplanned power cuts?

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



C9 Who did you report the power cut to?

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

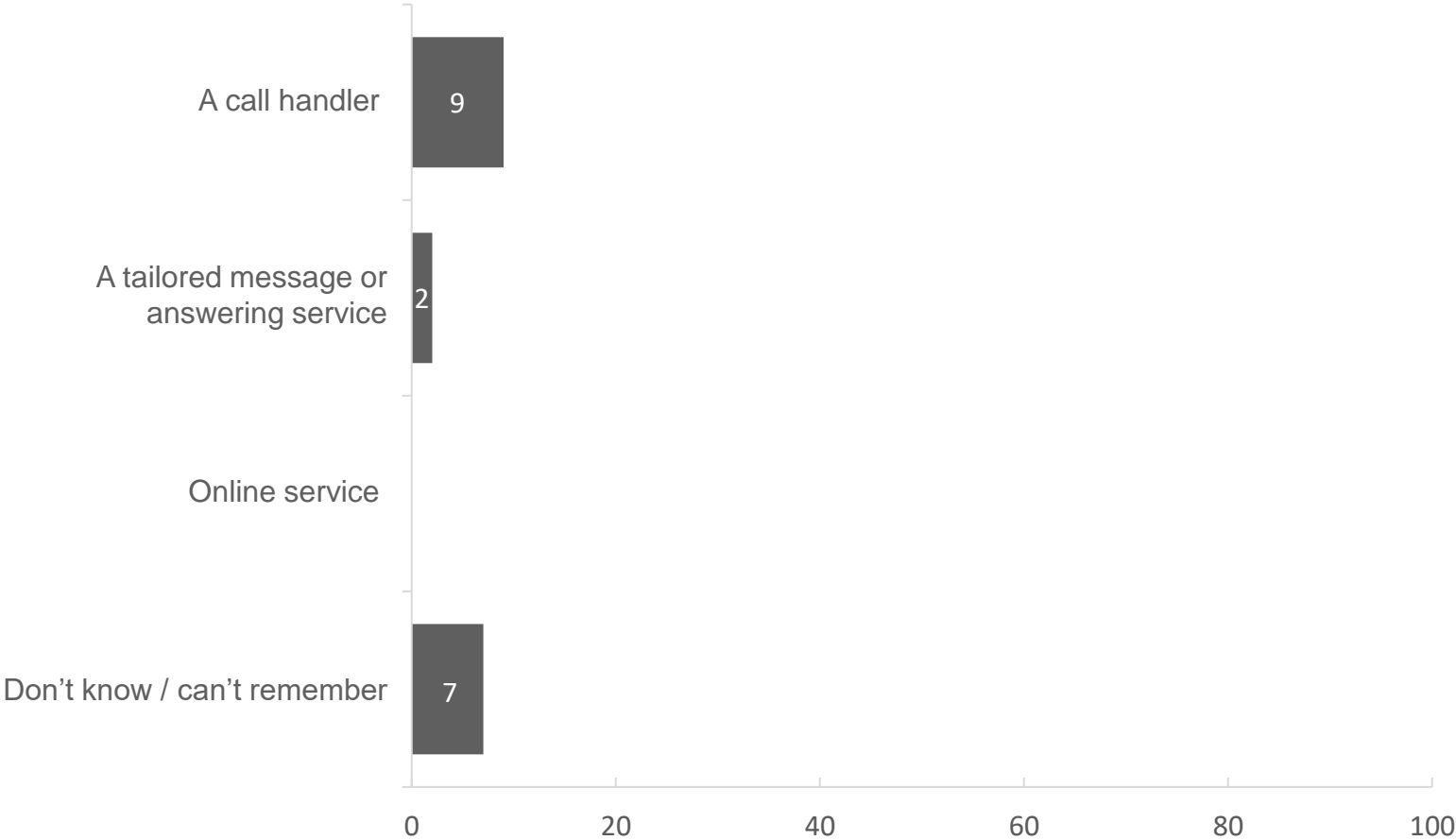


¹ Due to rounding percentages add to 99%-101%

C10 When you contacted NIE Networks did you reach..?

Base 27/18 : Businesses that reported an unplanned power cut to NIE Networks. Weighted data

NB: Low base - data displayed as counts

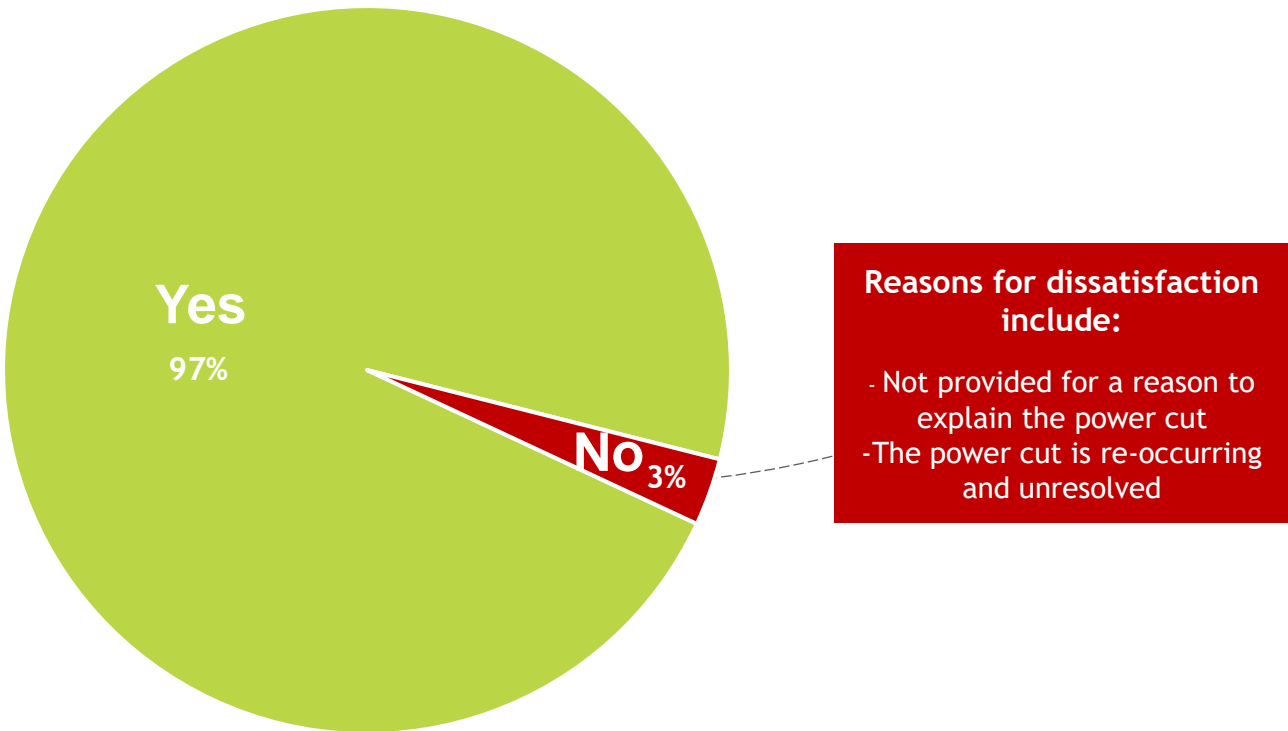


¹ Due to rounding percentages add to 99%-101%

C11 Were you satisfied with the information provided on contact with NIE?

NB: Low base

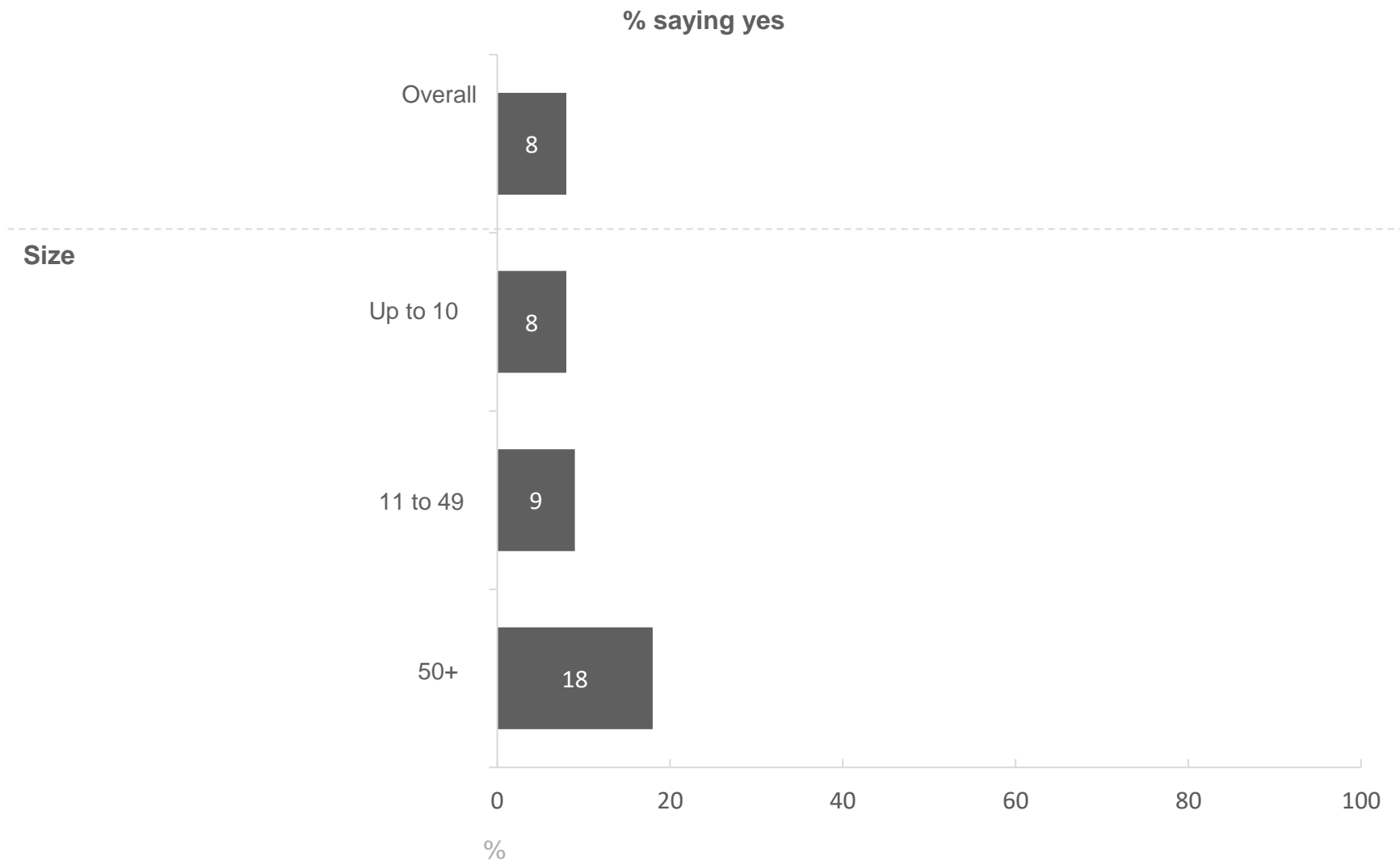
Base 16/12: Businesses that reached a call handler, tailored message or used an online service to report an unplanned power cut. Weighted data



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

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

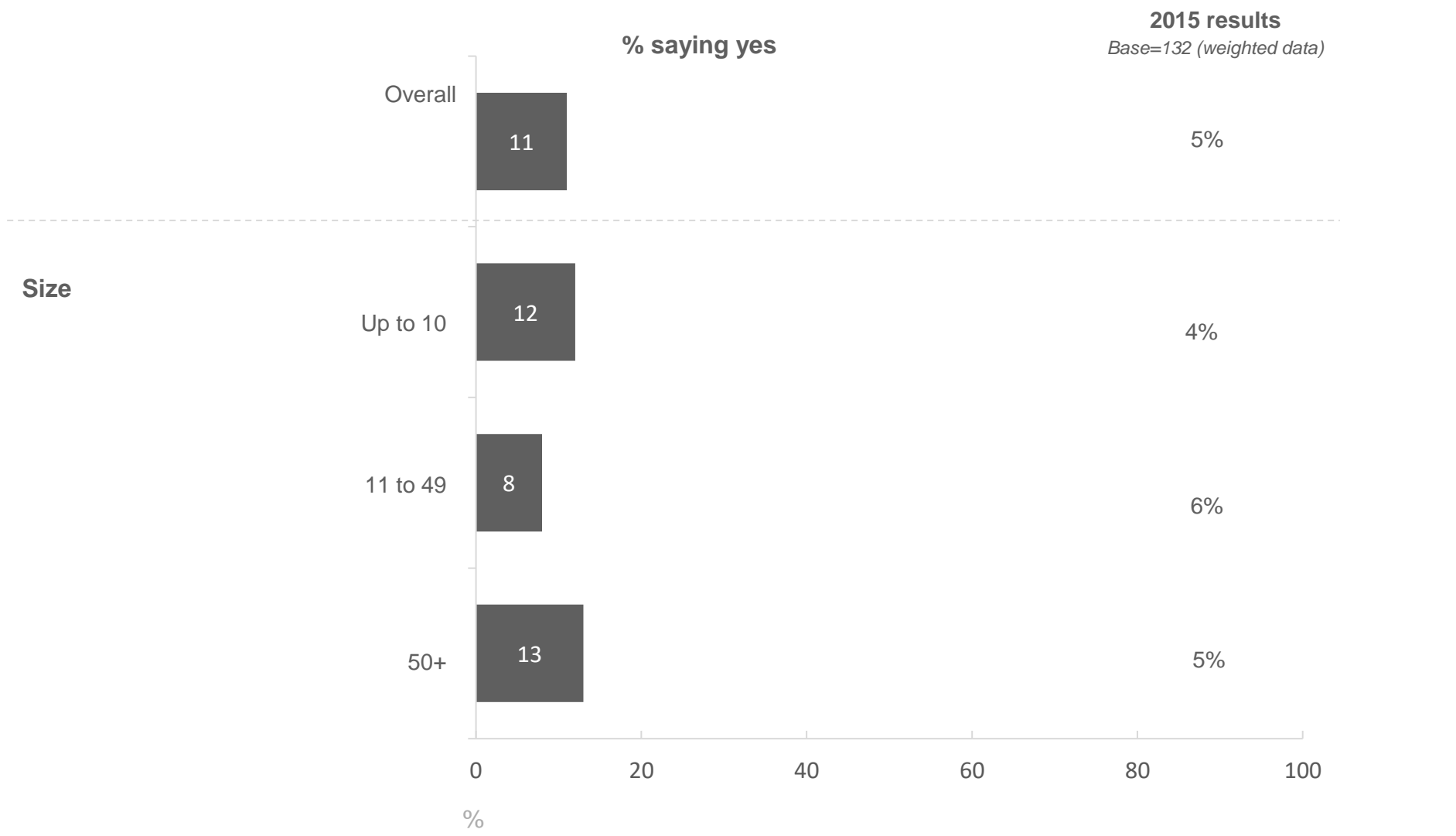
Base 213: All respondents. Weighted data



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

C13 In the last three years, have you made an application for a new connection to the electricity network or to alter your existing connection?

Base 213: All respondents. Weighted data



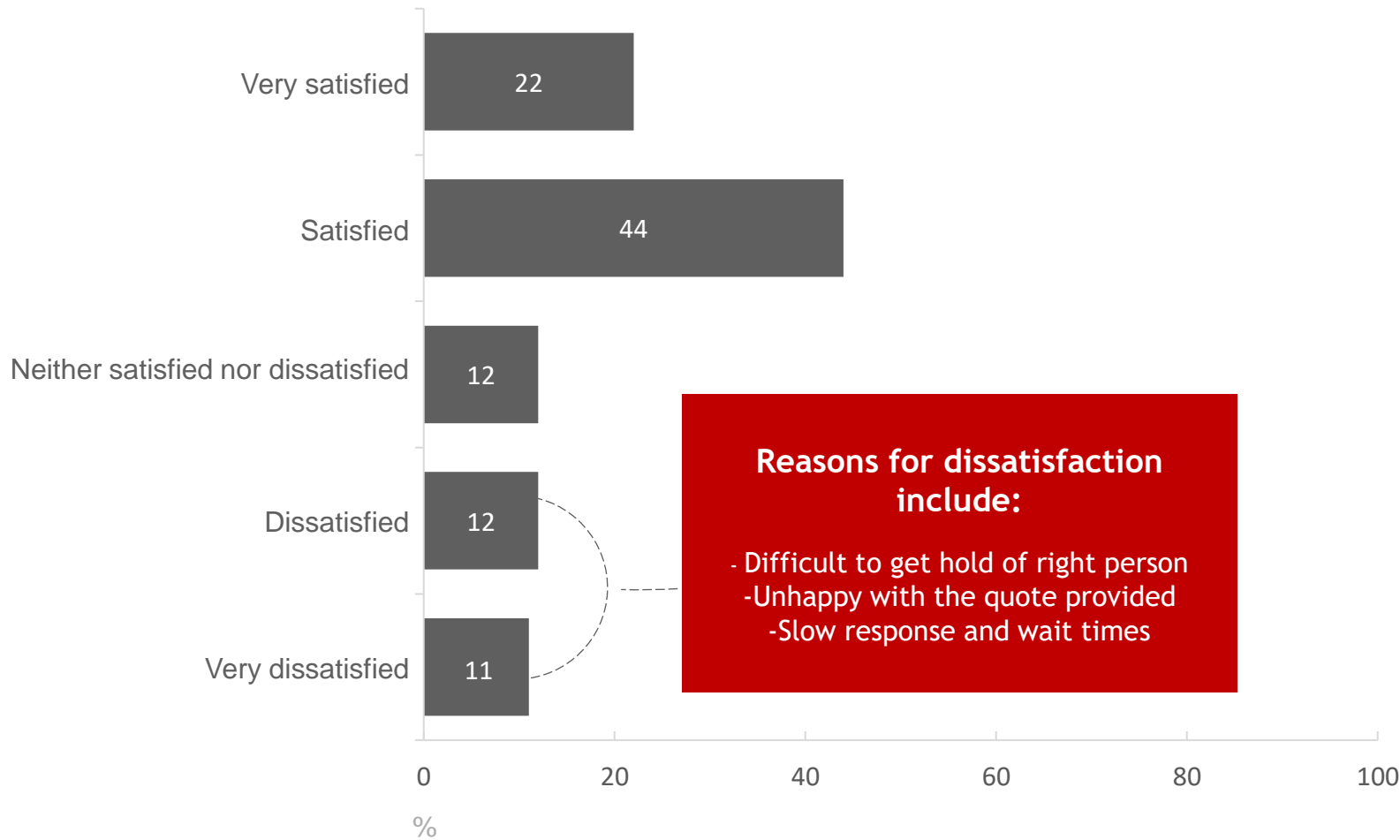
¹ Due to rounding percentages add to 99%-101%

*A new connection may be interpreted as changing supplier

C14 How satisfied or dissatisfied were you with this process?

NB: Low base

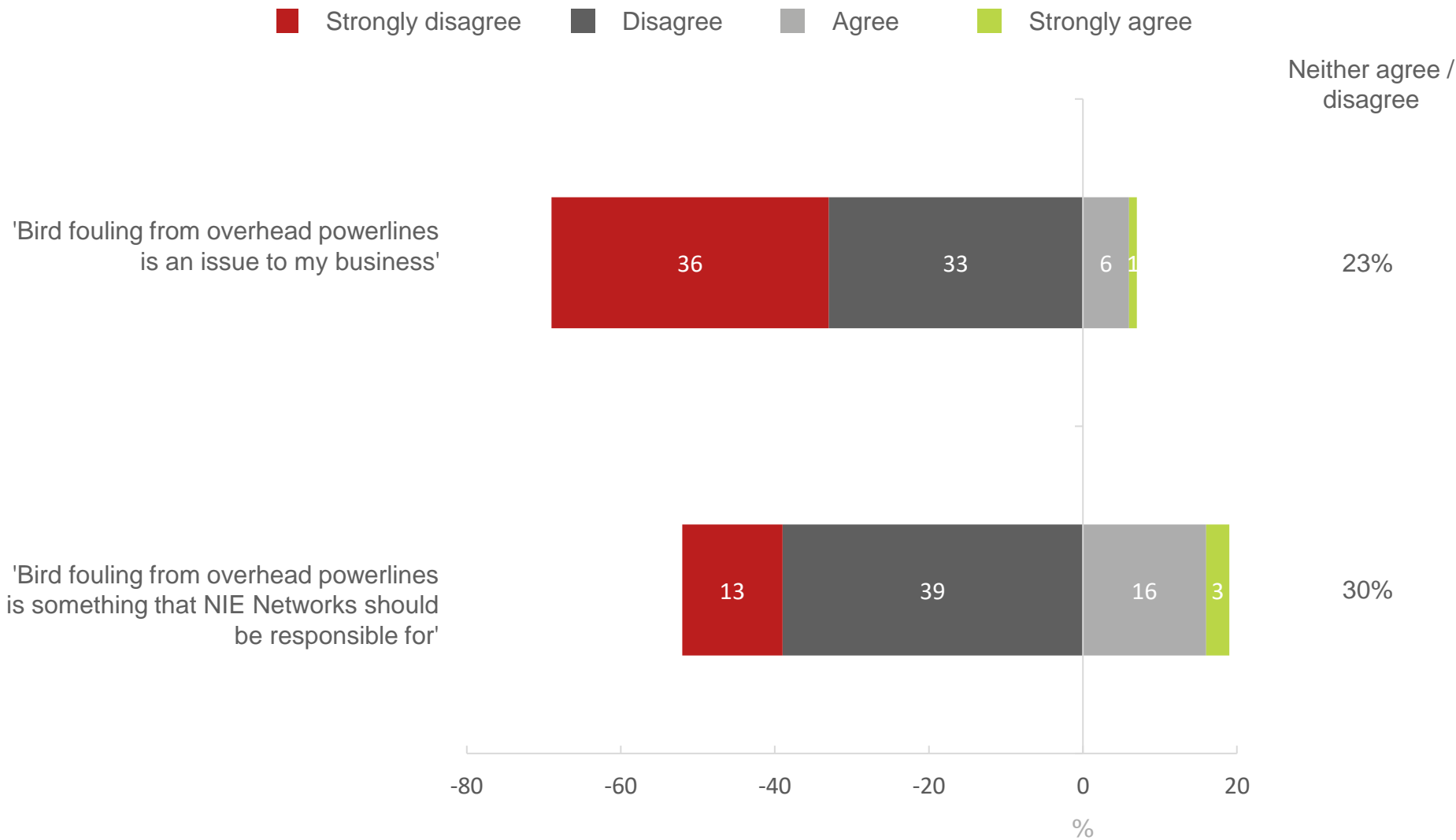
Base 24: Businesses that have made an application for a new connection or to alter an existing connection. Weighted data



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

C15 To what extent do you agree with the following statement?

Base 213: All respondents. Weighted data



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



Contact & communication channels

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

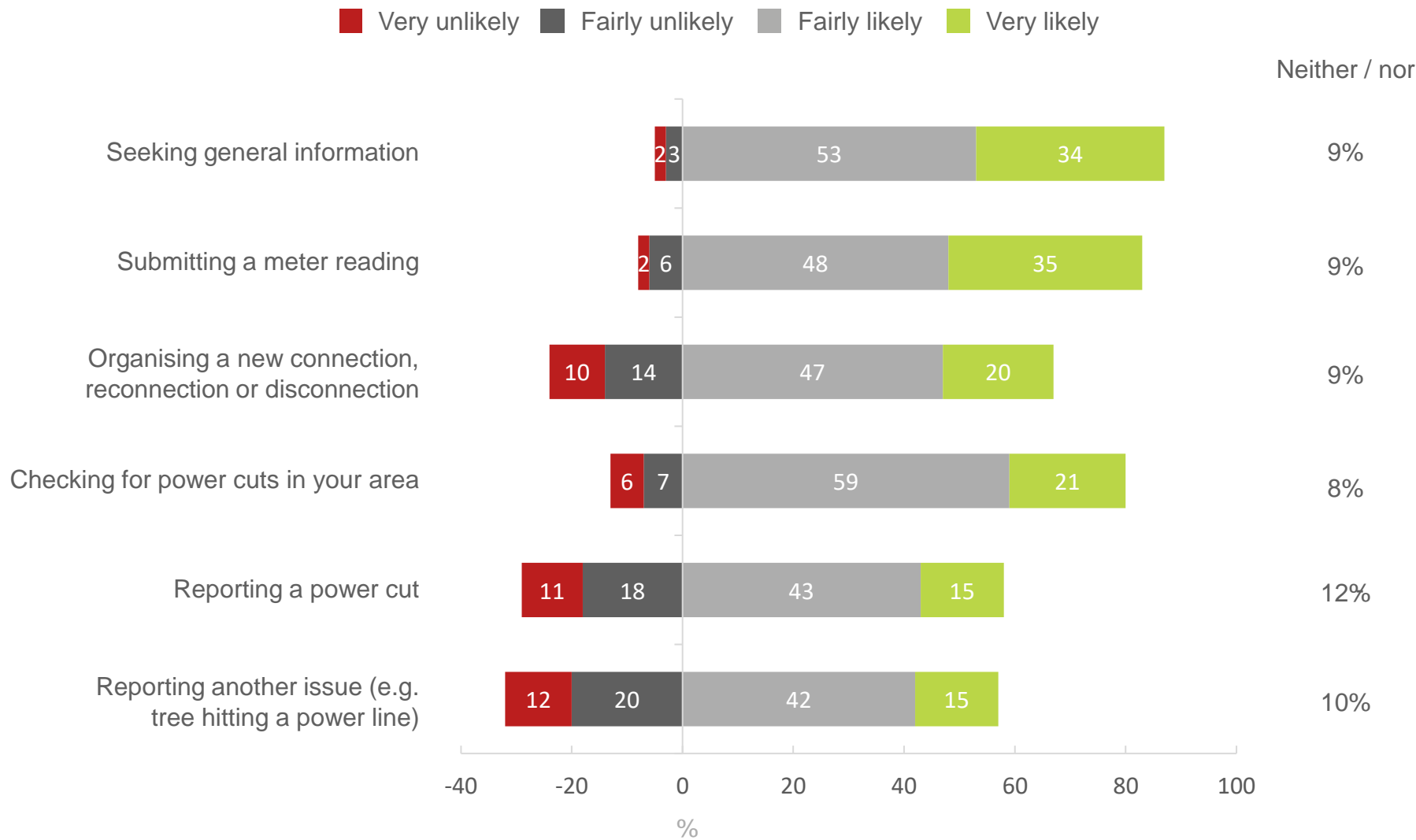
Base 213: All respondents. Weighted data

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

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

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

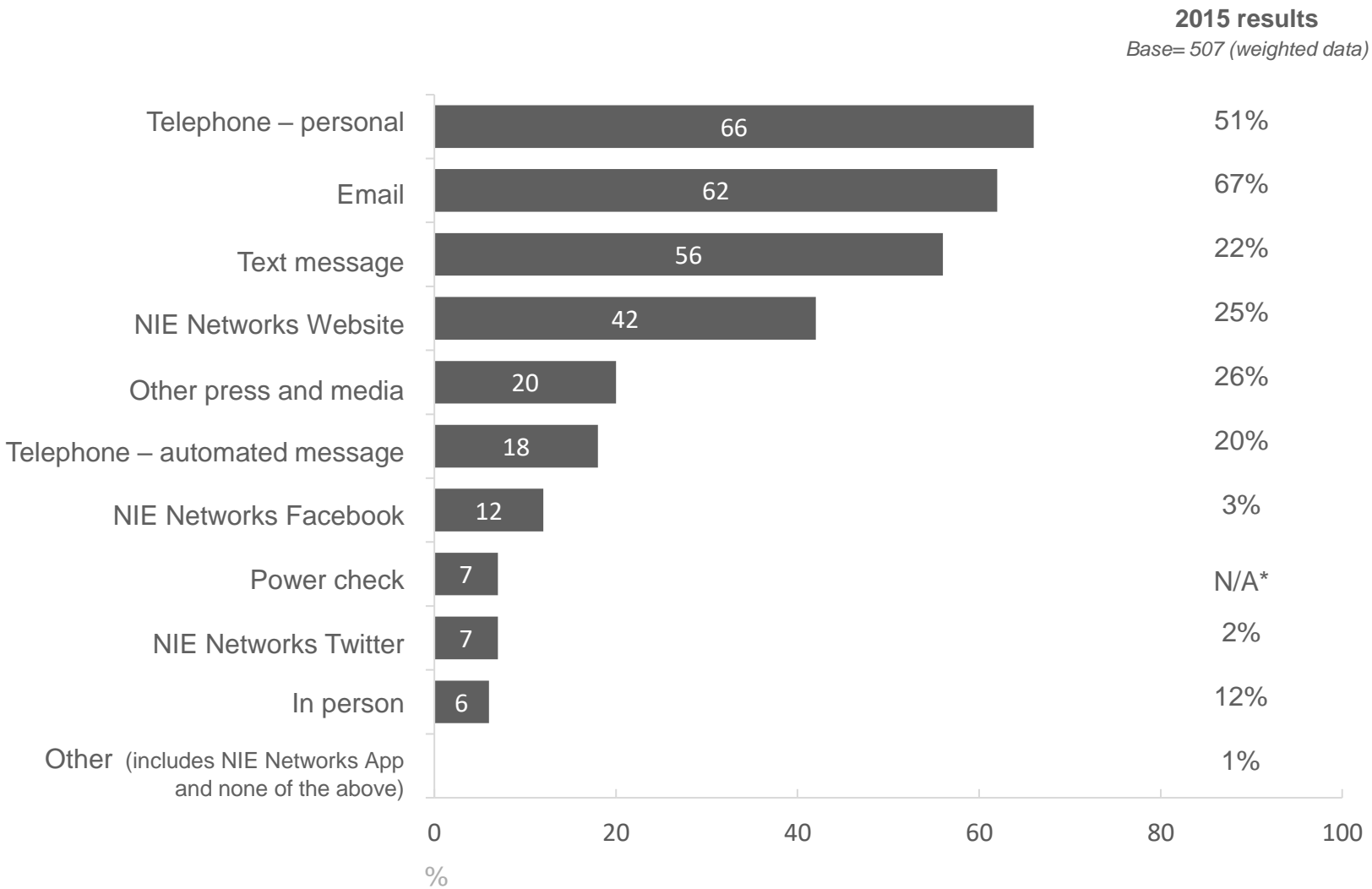
Base 213: All respondents. Weighted data



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

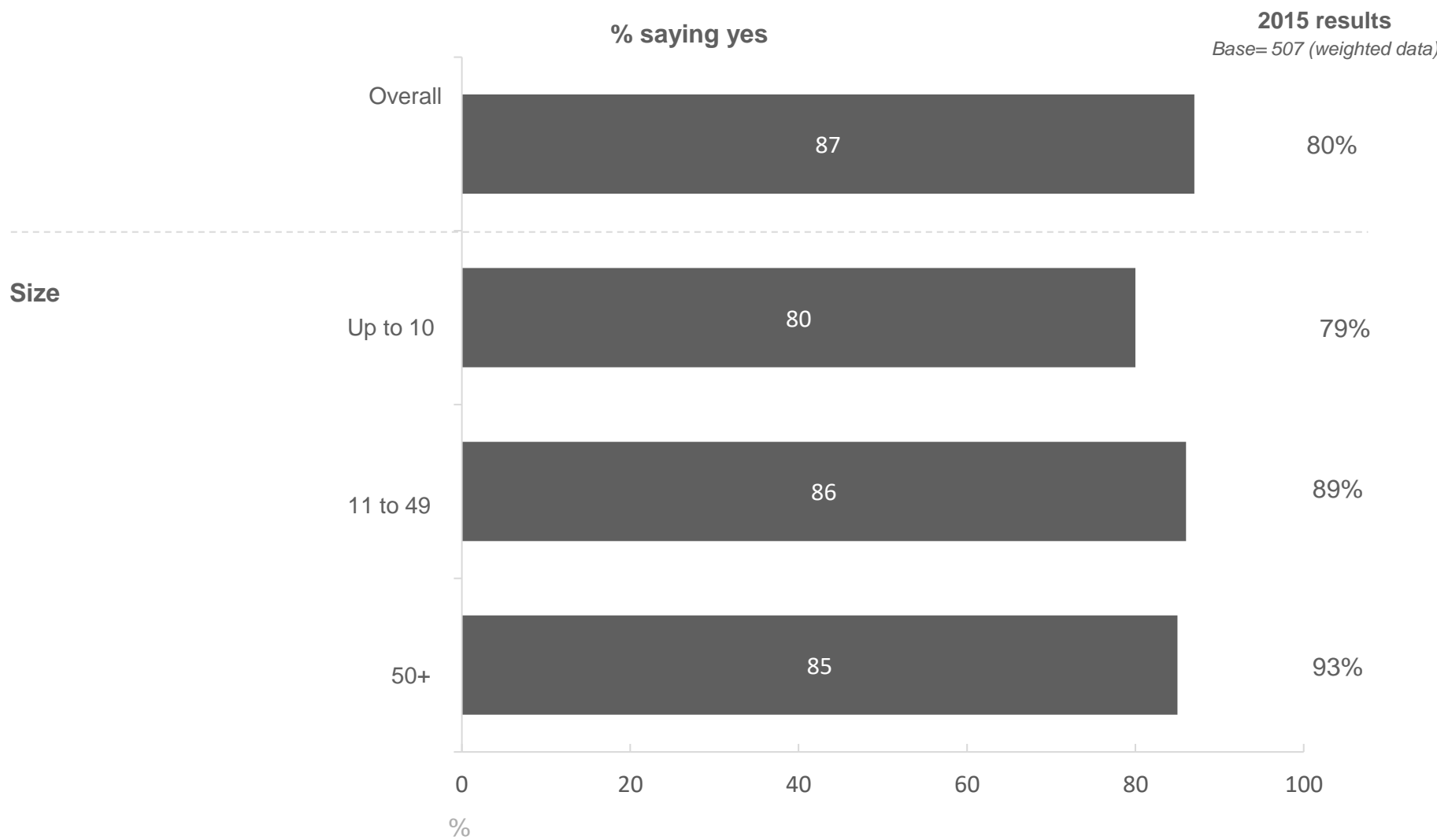
D3 Following initial contact with NIE Networks to report an issue, which of the following methods of communication are acceptable for NIE Networks to keep you up to date?

Base 213: All respondents. Weighted data



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

D4 If the service was available, would you register your telephone number or email with NIE Networks in order to receive automated local information about power cuts and to keep you up-to-date when you have a power cut? Base 213: All respondents. Weighted data



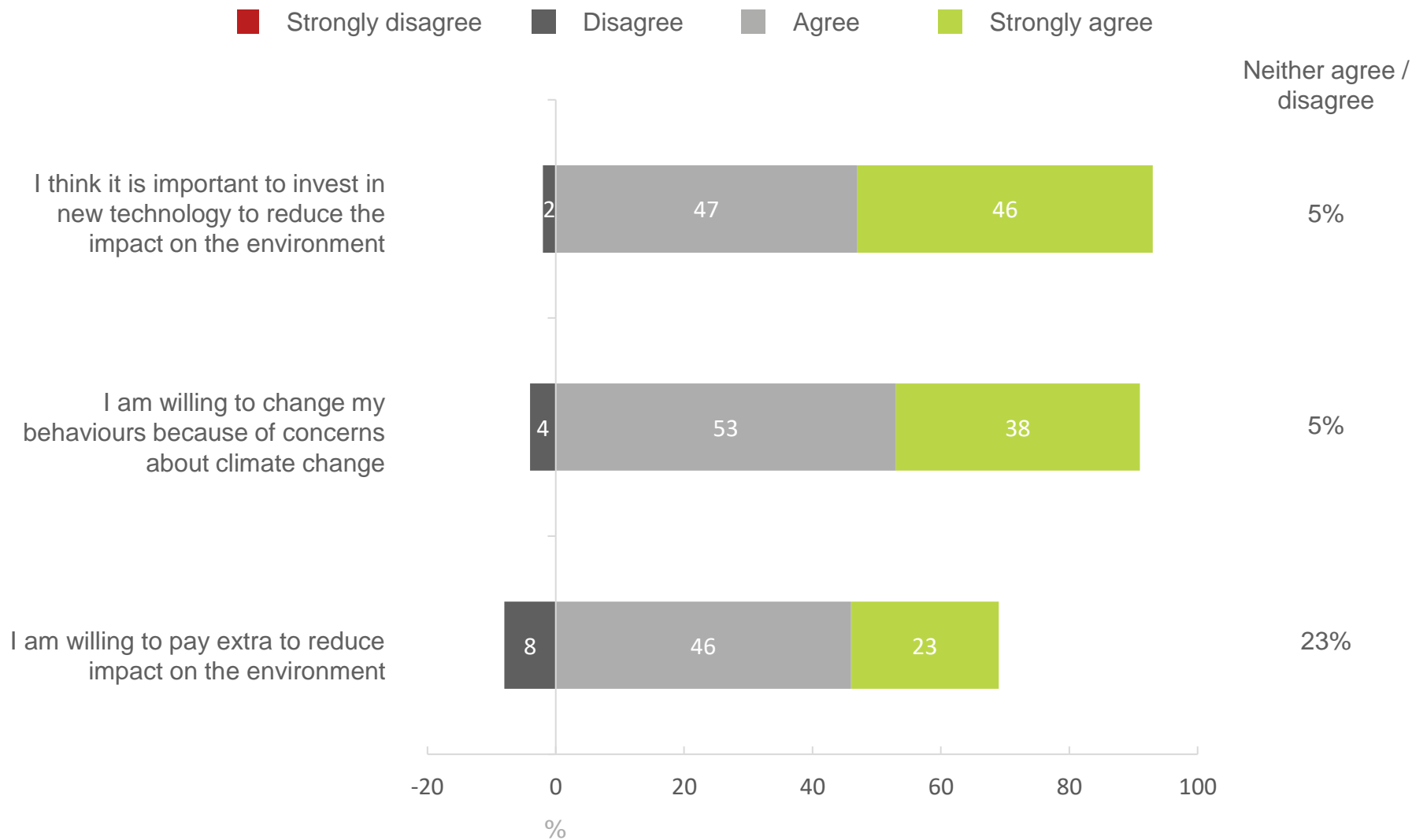
¹ Due to rounding percentages add to 99%-101%



Future networks

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

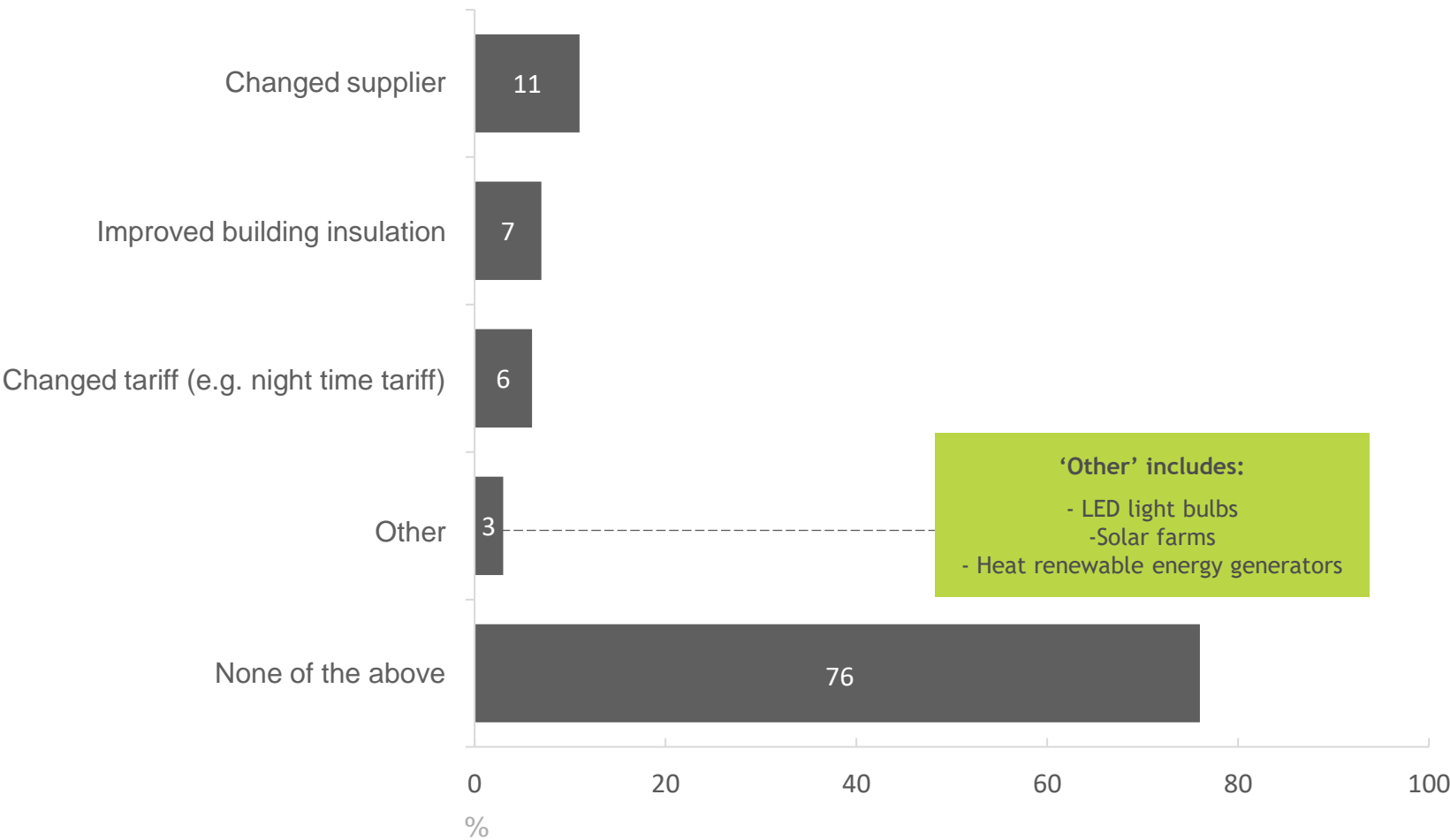
Base 213: All respondents. Weighted data



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

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

Base 213: All respondents. Weighted data



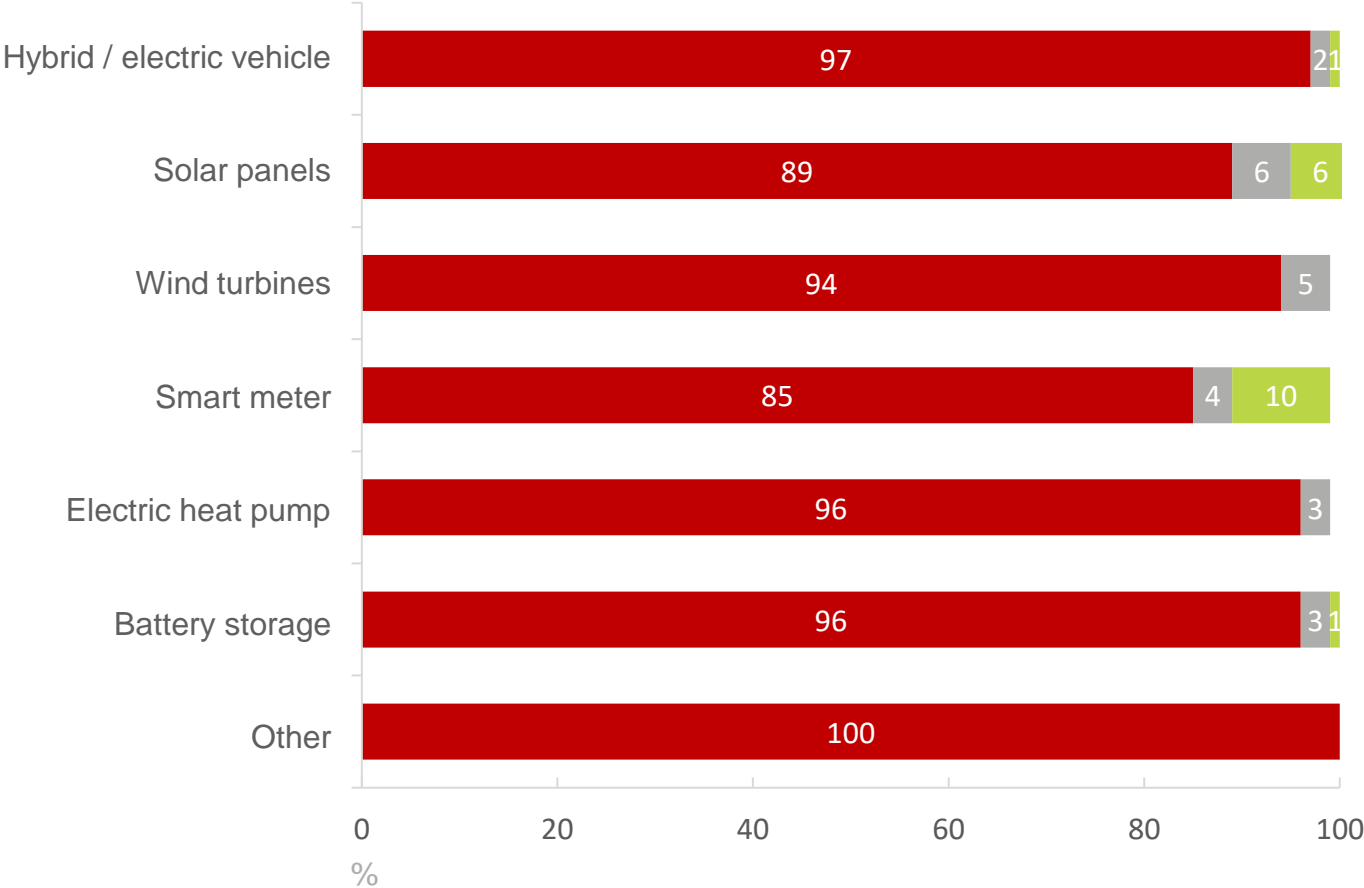
¹ Multiple response question, therefore percentages add to >100%

E3 Does your organisation currently have any of the following? And do you plan to have any in the next three years?

Base 213: All respondents. Weighted data

No plans in next three years Plan to have Currently have

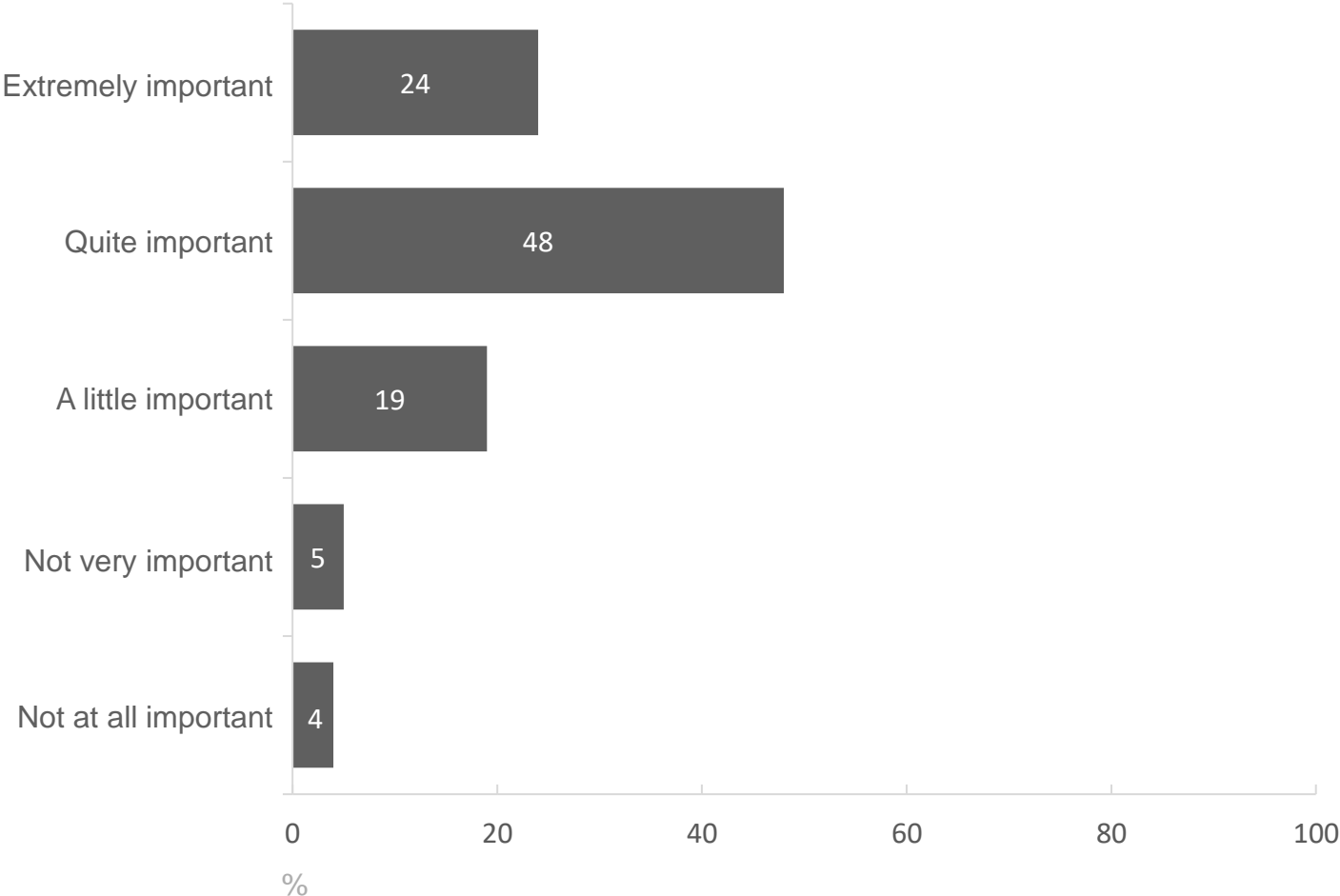
32% of respondents (base=69) currently have / planning to have one or more of these technologies within the next 3 years



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

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

Base 213: All respondents. Weighted data



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



Summary of findings

Perceptions and views of NIE Networks

Comparisons to other service providers

- NIE Networks scores well in terms of communication, when compared against other organisations.
- Although rated below the Royal Mail, business bank and electricity supplier, NIE Networks is rated similar to phone supplier and above NI Water, broadband provider, BT Openreach and the local council.

Understanding of NIE Networks' role

- When initially asked, almost one in five respondents (19%) said they are unsure of NIE Networks' role.
- 60% said that NIE Networks is responsible for generating or selling electricity. When interpreting the results in this report, this figure is worth noting, given it may impact on how respondents are interpreting other questions.
- Just under a fifth (19%) of respondents believe that bird fouling from overhead lines should be the responsibility of NIE Networks.

Overall satisfaction with NIE Networks

- Just under half (46%) said they would speak highly of NIE Networks. Just 4% would be critical.
- Businesses were provided with a number of statements about the NIE Networks and asked if they agreed with them. Overall, firms were positive, with 6% or under disagreeing with the statements.

Recent experience with NIE Networks

Experience of planned power cuts

- One in five (20%) have experienced a planned power cut in the last 12 months (same as reported percentage as in 2015).
- 13% of firms said their organisation had experienced a planned power cut more than once in the year-long time period.
- The majority of firms (76%) confirmed that a notification card would be an appropriate way to inform them of a planned power cut.
- However there has been an increase in preference for different methods of notification from 2015, including:
 - **Personal telephone call** (17% reported this to be their first preference, compared to 14% in 2015); and
 - **Email** (15% reported this to be their first preference, compared to 8% in 2015).

Experience of unplanned power cuts

- One in three (31%) have experienced a planned power cut in the last 12 months, up from 26% in 2015.
- Of these businesses, 20% said their organisation had experienced an unplanned power cut more than once in the time period. However 78% said that the power cut lasted under three hours.
- 59% of firms who experienced an unplanned power cut reported it, including 48% who reported the cut to NIE Networks.
- Just 3% were dissatisfied with the outcome of this interaction, compared to 97% who were satisfied.
- Reasons for dissatisfaction with the interaction included:
 - No reason to explain the power cut; and
 - The power cut is re-occurring / unresolved.

Preference for future contact and communication

Most preferred methods of interaction

- **For seeking general information:**
 1. NIE Networks website (55% prefer)
 2. Personal telephone call (32% prefer)
- **For submitting a meter reading:**
 1. Personal telephone call (36% prefer)
 2. NIE Networks website (32% prefer)
- **For organising a (dis/re) connection:**
 1. Personal telephone call (63% prefer)
 2. NIE Networks website (19% prefer)
- **For checking for power cuts:**
 1. NIE Networks website (48% prefer)
 2. Personal telephone call (41% prefer)
- **For reporting a power cut:**
 1. Personal telephone call (76% prefer)
 2. NIE Networks website (15% prefer)
- **For reporting another issue:**
 1. Personal telephone call (72% prefer)
 2. NIE Networks website (18% prefer)

Likelihood to use alternative platforms

- Generally, there is increased tolerance for being updated on a reported issue through digital platforms, in particular:
 1. **Telephone**
66% find acceptable, up from 51% in 2015
 2. **Email**
62% find acceptable, up from 67% in 2015
 3. **Text message**
56% find acceptable, up from 22% in 2015
 4. **NIE Networks website**
42% find acceptable, up from 25% in 2015
- The majority of firms (87%) said they would register their telephone or email with NIE Networks in order to receive local information about power cuts and to be kept up to date during power cuts (up from 80% in 2015).

Investment priorities for the future

Views about climate change

- Just 9% consider the issue of climate change to be of low importance to their organisation, compared to 91% who feel it is extremely quite or a little important to their firm.
- The vast majority (93%) of businesses agree or strongly agree that it is important to invest in new technology to reduce environmental impacts.
- While 91% are willing to change their behaviours generally, 69% are willing to pay extra to reduce their carbon footprint.

Actions taken to reduce electricity bill / footprint

- In the last three years, three quarters of firms (75%) have not made any changes to reduce their electricity bill.
- This compares to:
 - 11% who have changed supplier;
 - 7% who have improved the insulation in their building;
 - 6% who have changed tariff; and
 - 3% who have done something else (installation of LED lightbulbs, solar farms and/or heat renewable energy generators).

Uptake of low carbon technologies

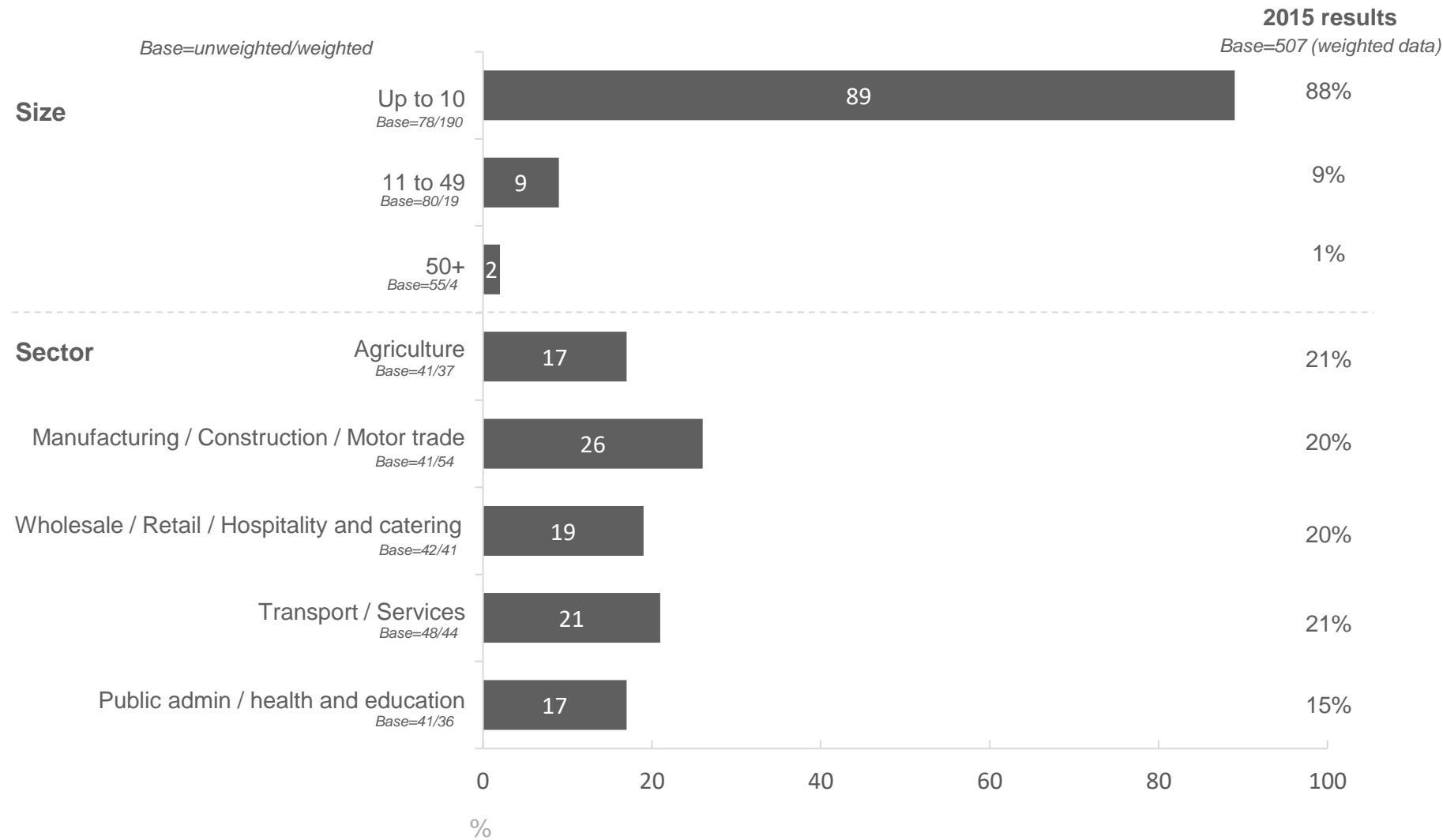
- One in three (32%) currently have or are planning to install one or more of the following within the next three years:
 - **hybrid/electric vehicle** 1% have, 3% plan to have
 - **Solar panels** 6% have, 6% plan to have
 - **Wind turbines** none have, 5% plan to have
 - **Smart meters** 10% have, 4% plan to have
 - **Electric heat pump** none have, 3% plan to have
 - **Battery storage** 1% have, 3% plan to have



Appendix A - Business profile

Business profile

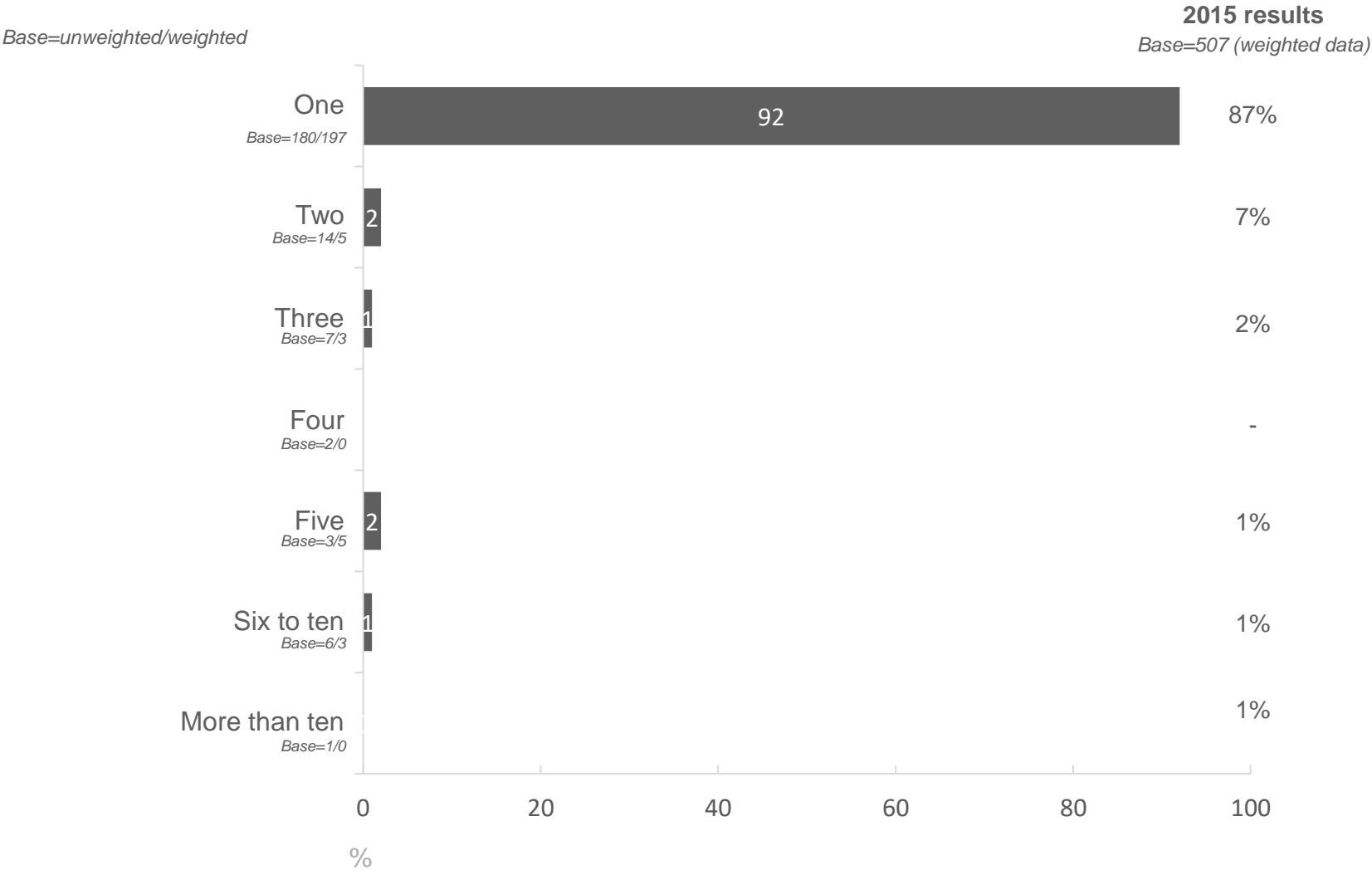
Base 213: All respondents. Weighted data



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

S3 How many sites does your organisation have in Northern Ireland?

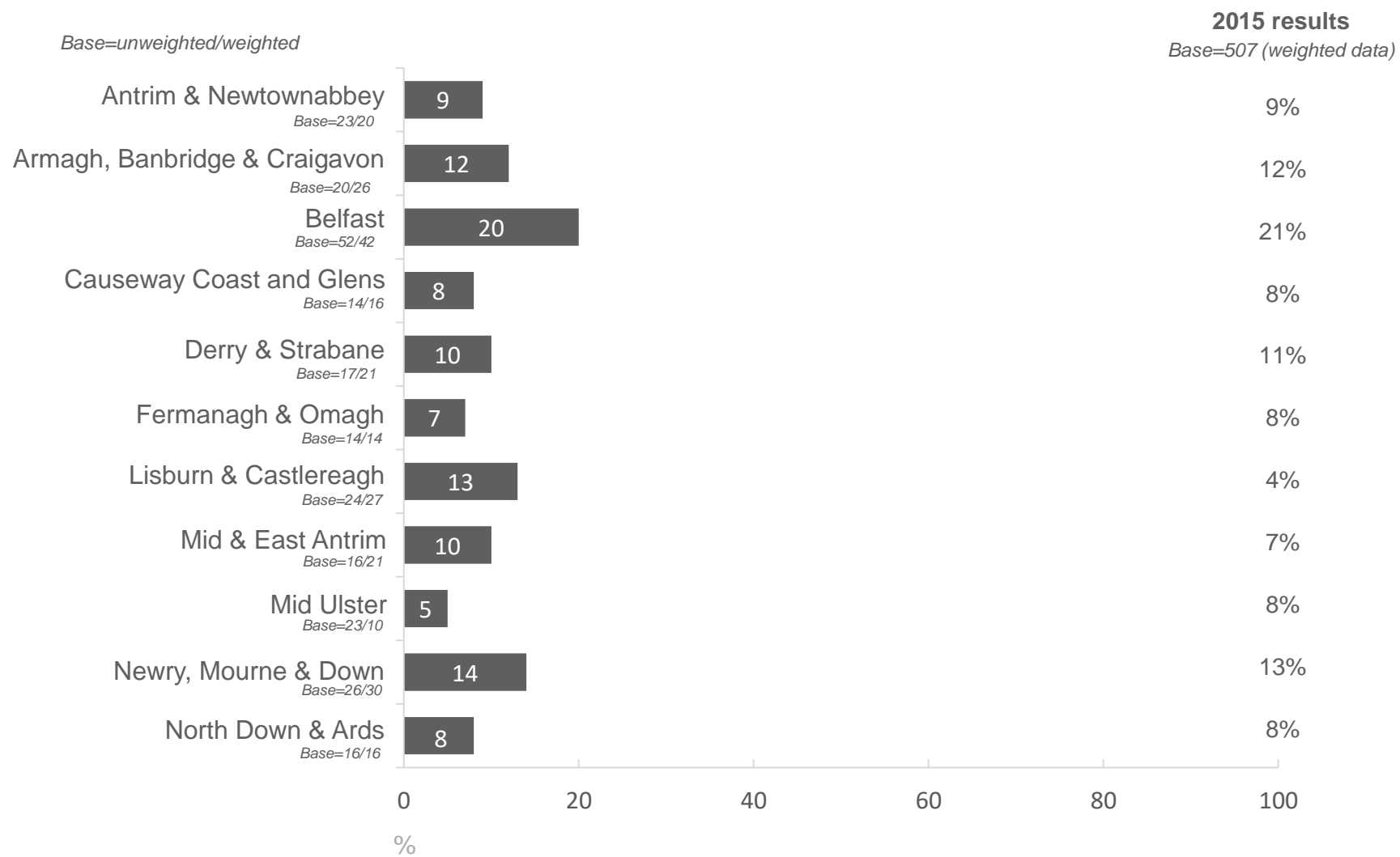
Base 213: All respondents. Weighted data



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

S4 In which council area(s) is your organisation located?

Base 213: All respondents. Weighted data

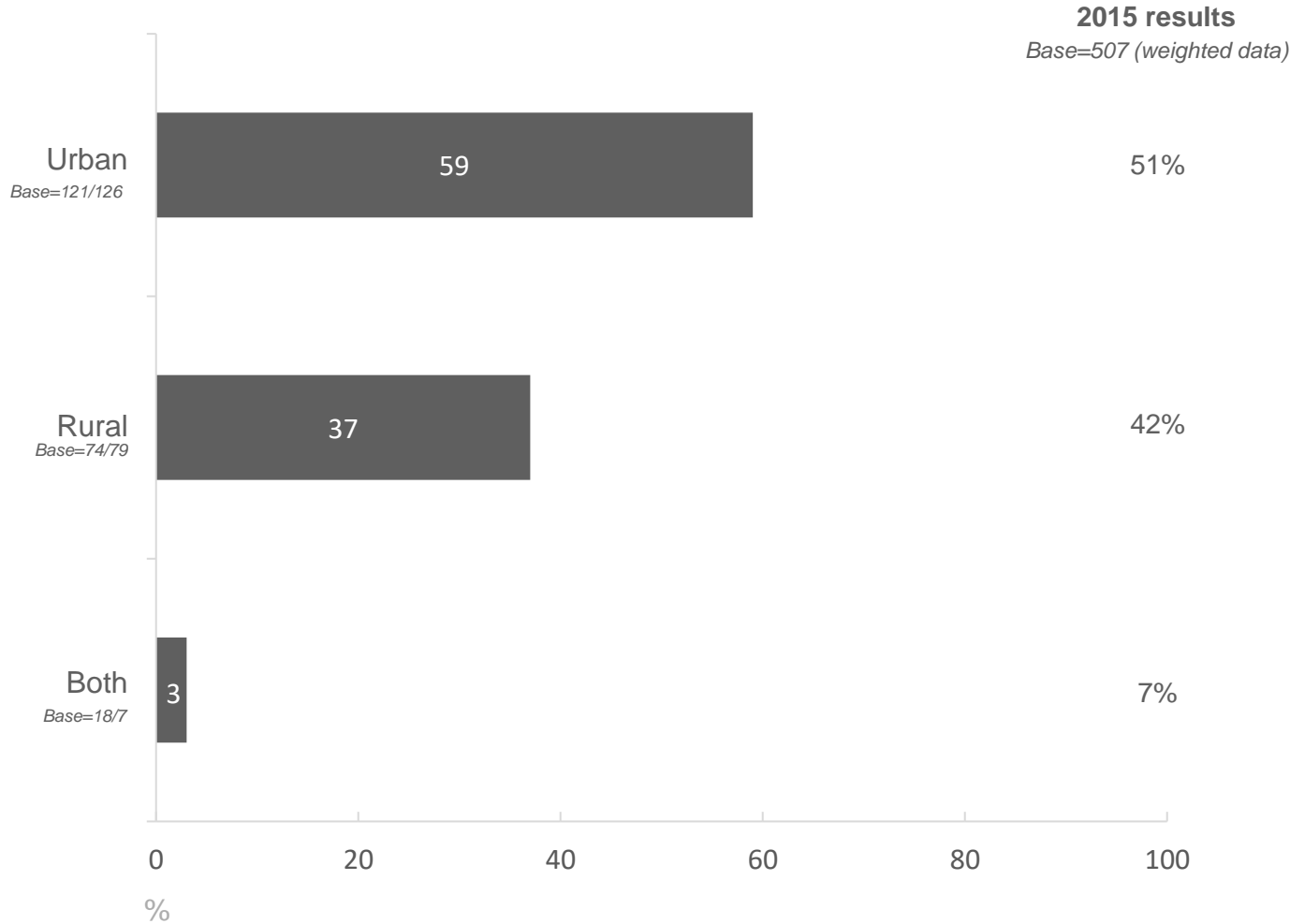


¹ Due to rounding percentages add to 99%-101%

S5 Do you consider the place(s) where your organisation is based to be in an urban or rural location?

Base 213: All respondents. Weighted data

Base=unweighted/weighted



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



Appendix B - Sample stratification

Sample stratification

Base 213: All respondents. Weighted data

	Number of interviews achieved	Percentage of businesses surveyed	Weighting applied
Up to 10 employees	78	37%	89%
11 to 49 employees	80	38%	9%
50+ employees	55	26%	2%
Total	213	100%	100%
Agriculture	41	19%	-
Manufacturing / Construction / Motor Trade	41	19%	-
Wholesale / Retail / Hospitality and catering	42	20%	-
Transport / Services	48	23%	-
Public admin / Health and education	41	19%	-
Total	213	100%	-
Urban	121	57%	
Rural	74	35%	
Both	18	8%	
Total	213	100%	-

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