

NIE Networks survey with domestic customers

Key findings report

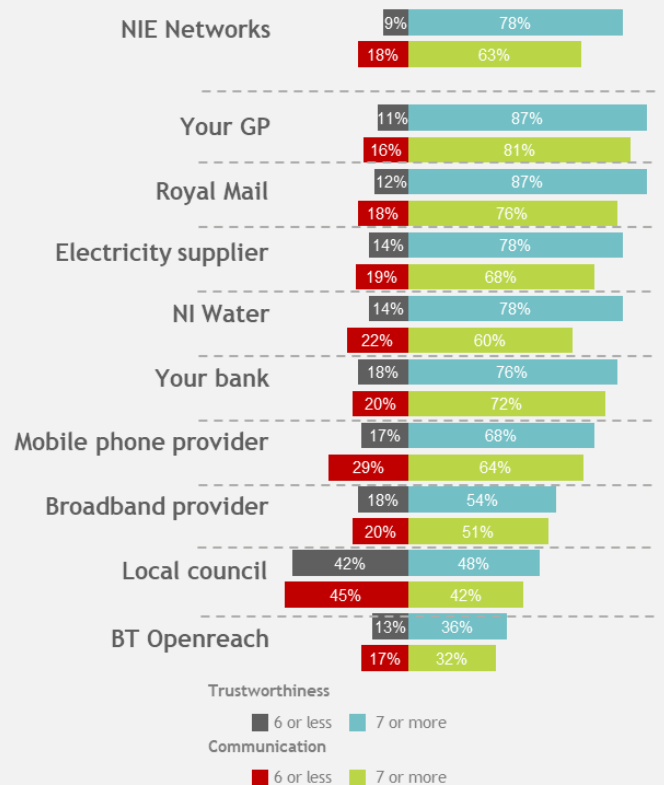
January 2020

RESULTS OF A 2019 SURVEY WITH DOMESTIC CUSTOMERS

NIE NETWORKS' NET PROMOTER SCORE



PERCEPTIONS OF SERVICE PROVIDERS



35% are unsure of NIE Networks' role

62% believe NIE Networks is responsible for generating and / selling electricity

RECENT EXPERIENCE WITH NIE NETWORKS

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



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

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

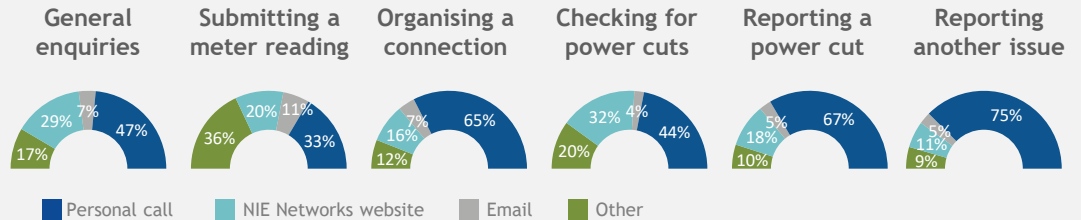


13% experienced an unplanned power cut in the same time period.

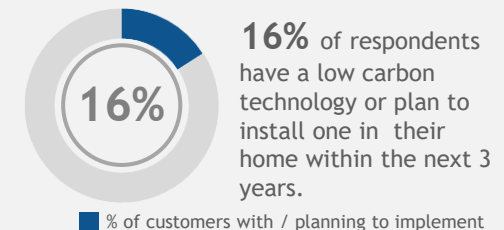


86% would like a notification card to inform them of planned power cuts. Three quarters (75%) stated this would be their first preference.

PREFERRED COMMUNICATION CHANNELS



FUTURE NETWORKS



This study was conducted by the independent research company:



Introduction & approach

Aim & approach

Aim

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

Approach

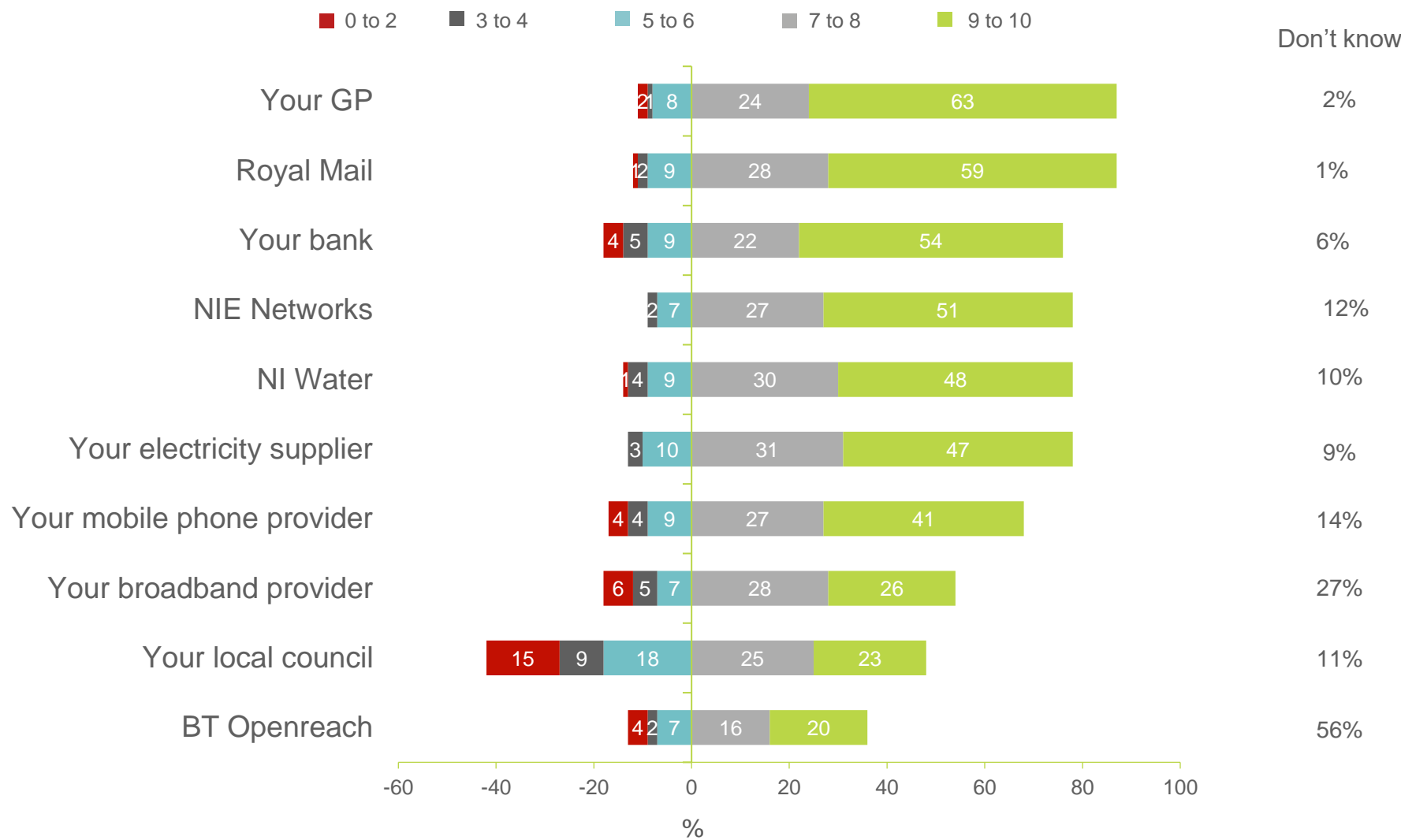
- A total of 510 face-to-face interviews were conducted between 8th November and 19th December 2019;
- Quotas were applied to the survey to ensure a range of customers were interviewed;
- Findings were analysed using Perceptive Insight's specialist survey software.



Perceptions of different service providers

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

Base 510: All respondents



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

A1 Rating scores - trustworthiness

Base 510: All respondents.

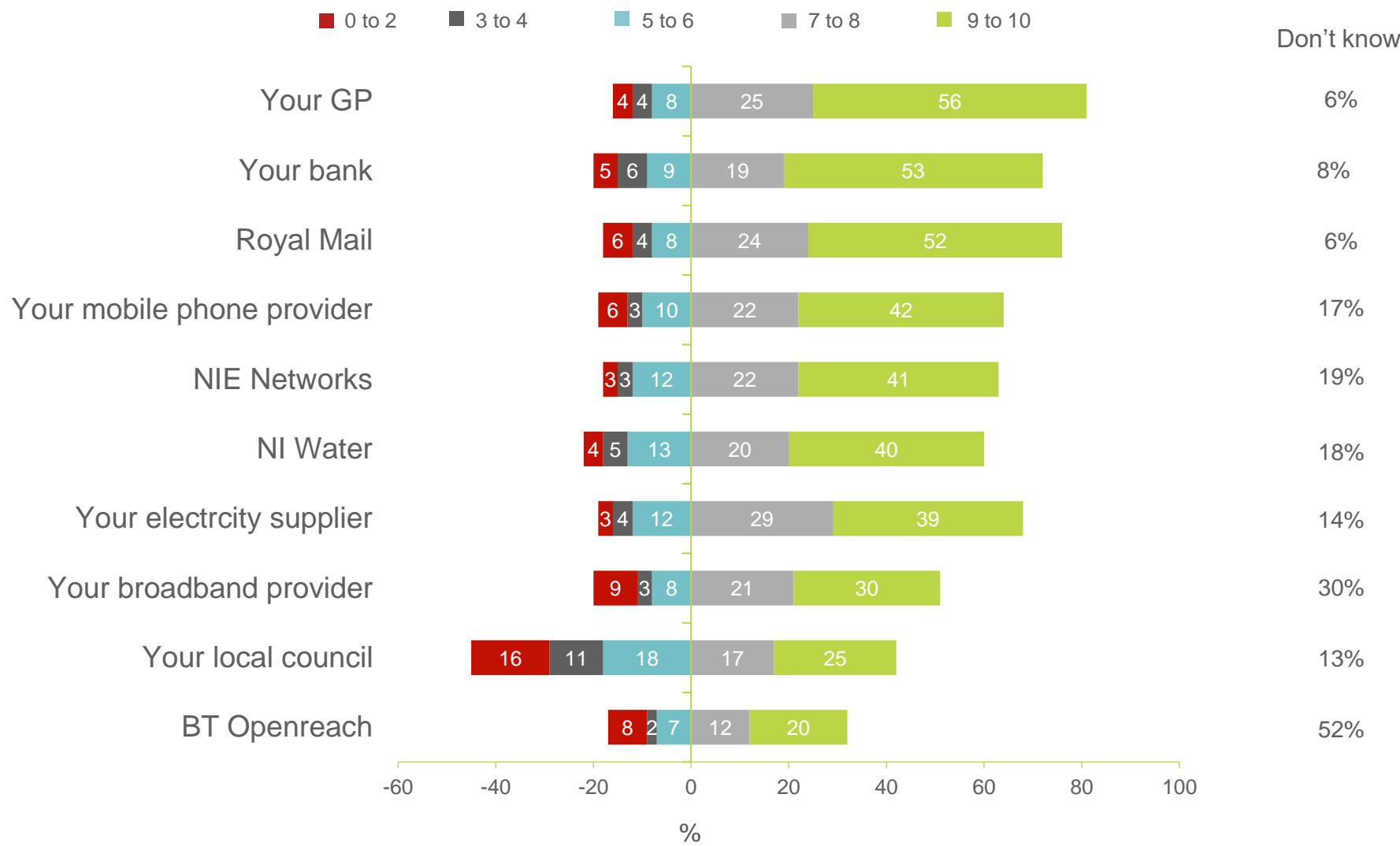
	Low scorers	Neutrals	High scorers
Rating:	0 – 6	7 - 8	9 - 10
Your GP	11%	24%	63%
Royal Mail	12%	28%	59%
Your bank	18%	22%	54%
NIE Networks	9%	27%	51%
NI Water	14%	30%	48%
Your electricity supplier	13%	31%	47%
Your mobile phone provider	17%	27%	41%
Your broadband provider	18%	28%	26%
Your local council	42%	25%	23%
BT Openreach	13%	16%	20%

¹ Adapted from Net Promoter Score

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

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

Base 510: All respondents



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

A1 Rating scores - communication

Base 510: All respondents.

	Low scorers	Neutrals	High scorers
Rating:	0 – 6	7 - 8	9 - 10
Your GP	16%	25%	56%
Your bank	20%	19%	53%
Royal Mail	18%	24%	52%
Your mobile phone provider	19%	22%	42%
NIE Networks	18%	22%	41%
NI Water	22%	20%	40%
Your electricity supplier	19%	29%	39%
Your broadband provider	20%	21%	30%
Your local council	45%	17%	25%
BT Openreach	17%	12%	20%

¹ Adapted from Net Promoter Score

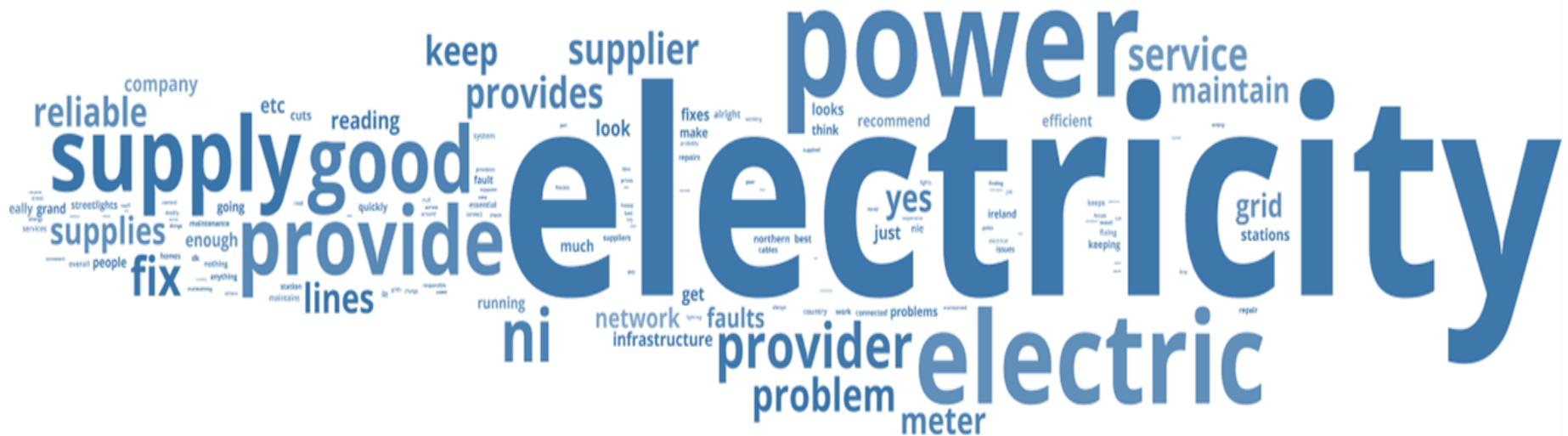
² Due to rounding percentages add to 99%-101%

Views of NIE Networks

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

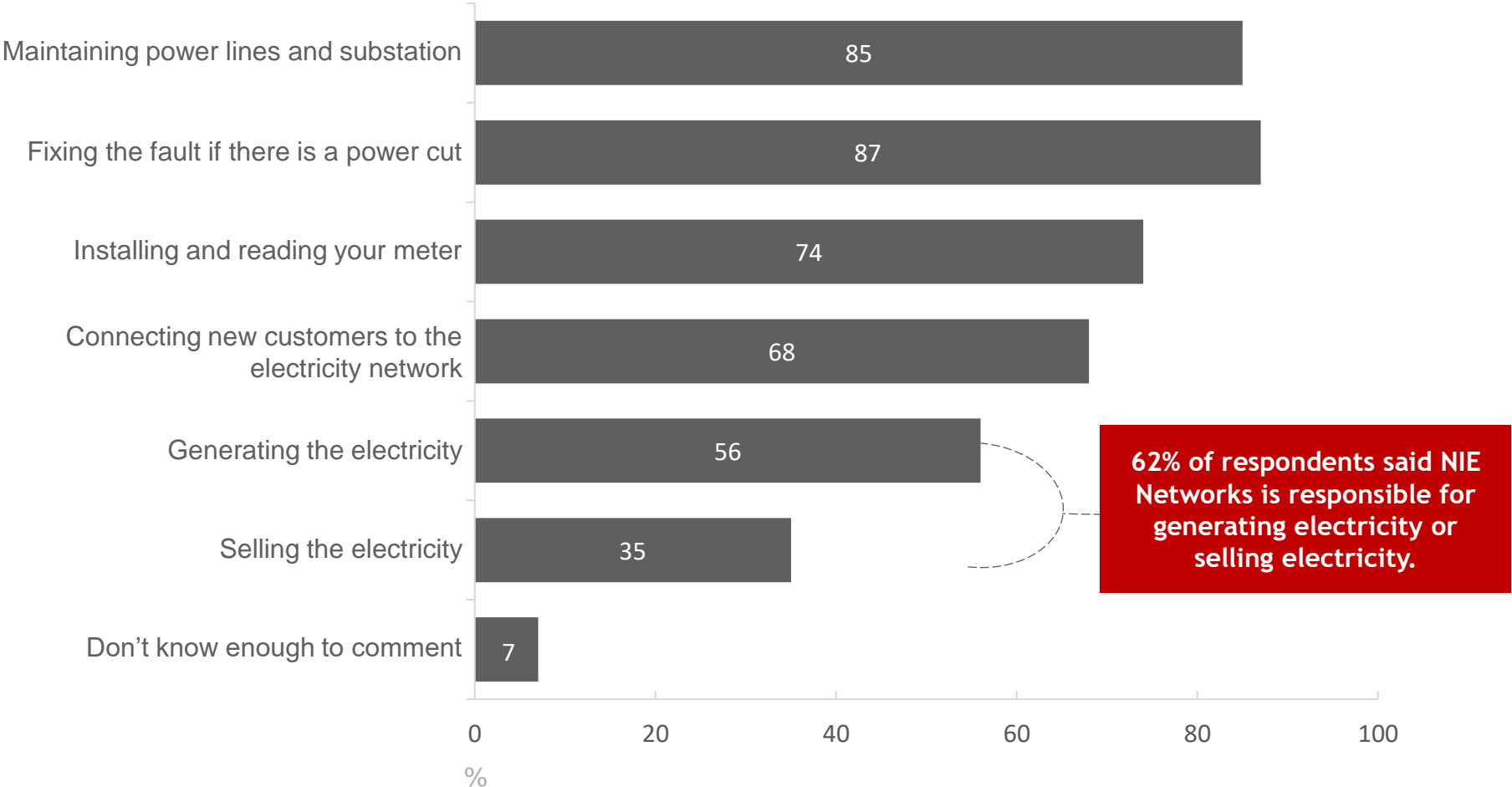
Base 510: All respondents

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



B2 Which of the following is NIE Networks responsible for?

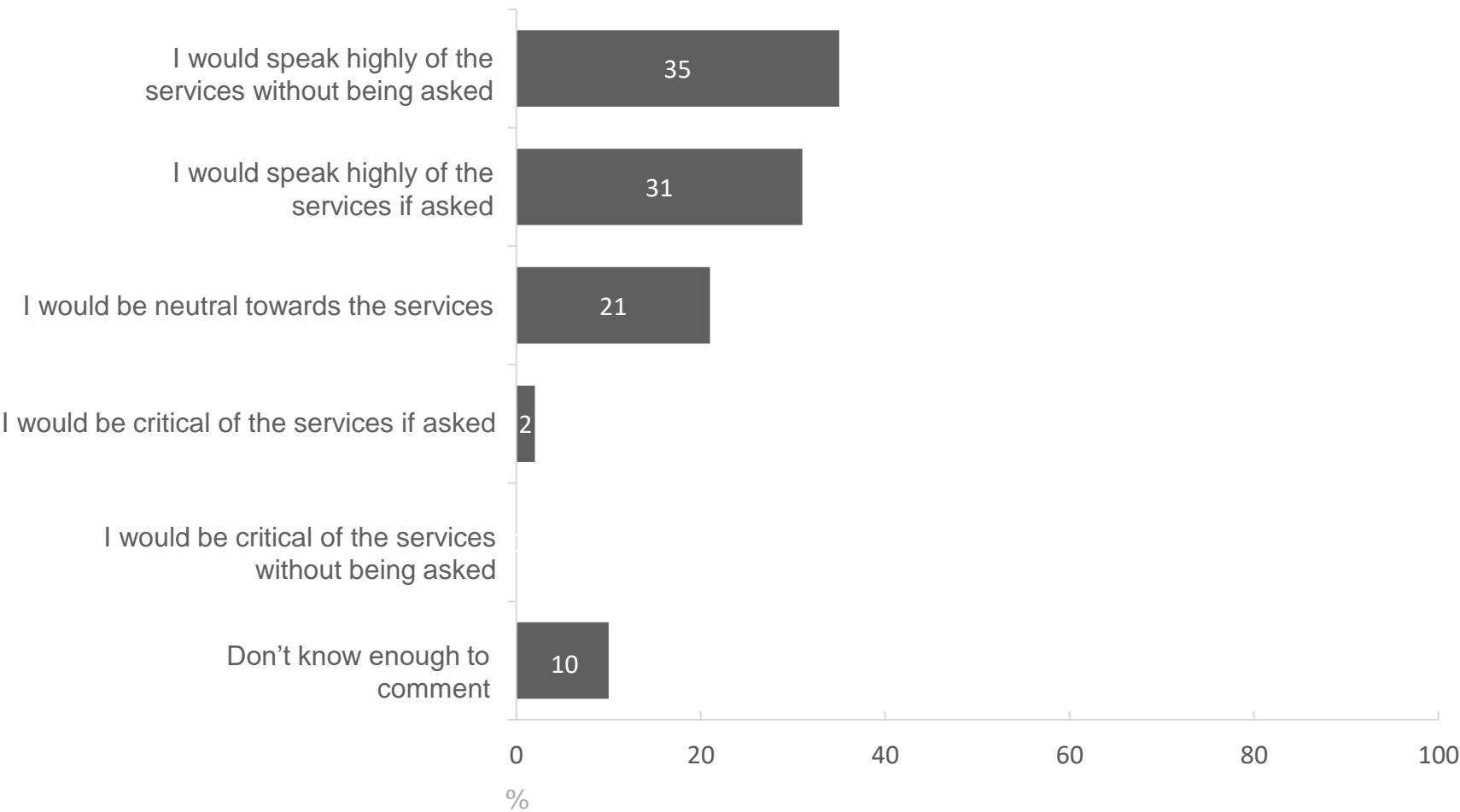
Base 510: All respondents



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

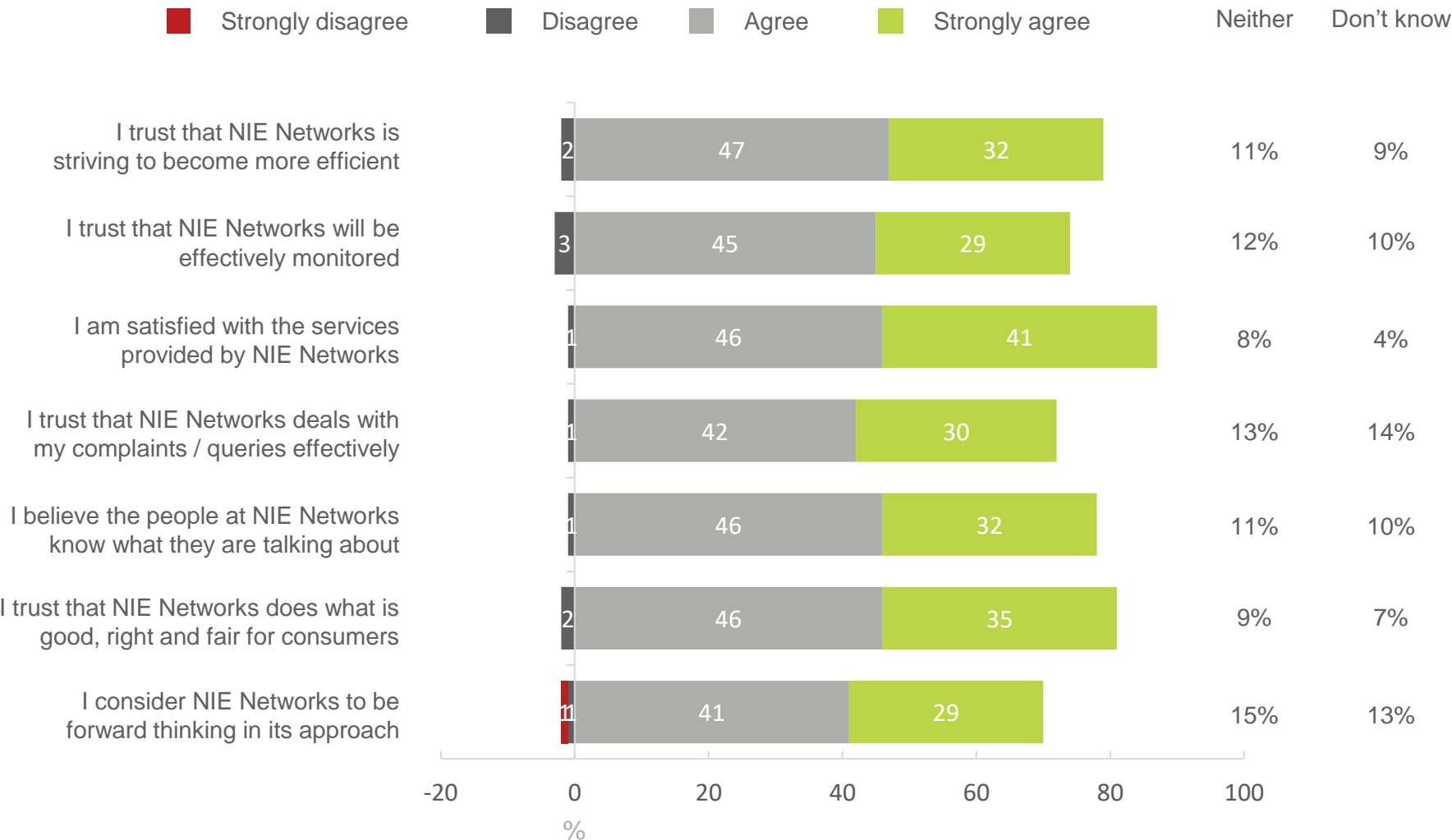
B3 Which single phrase best describes the way you would speak to friends and relatives about the service provided by NIE Networks?

Base 510: All respondents



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

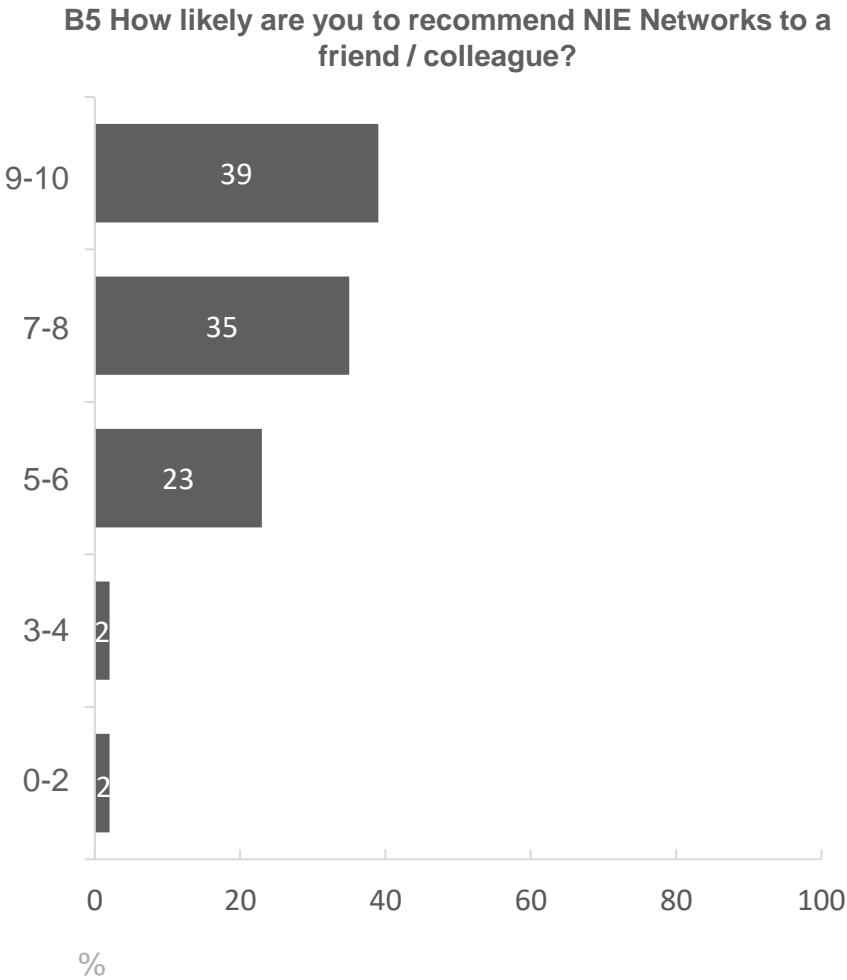
Base 510: All respondents



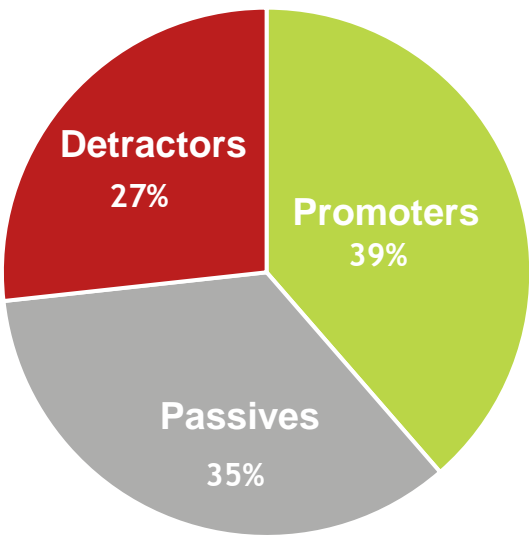
¹ Due to rounding, percentages add to 99%

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

Base 510: All respondents



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



NPS score = 12*

*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 (2%).

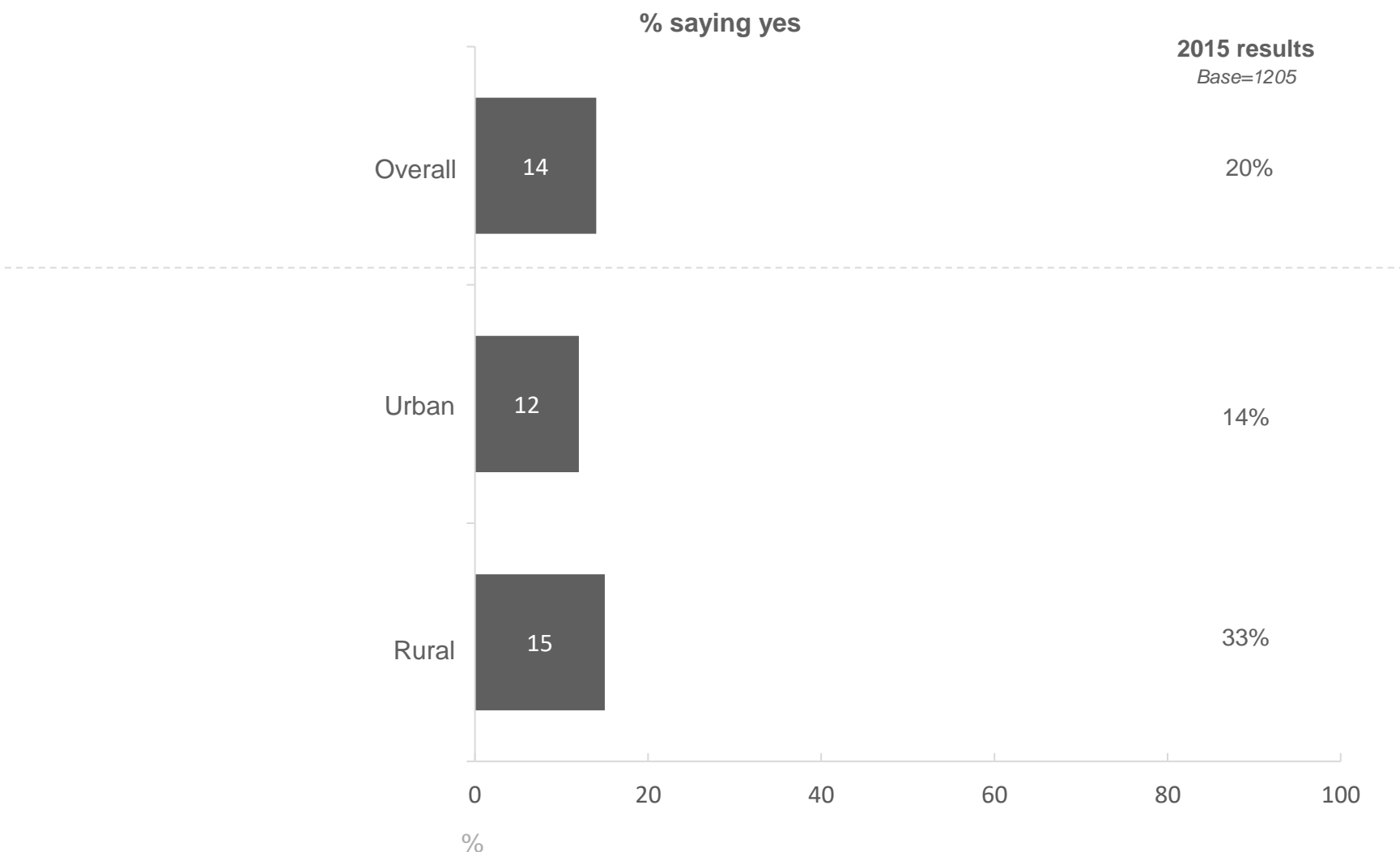
¹ Answered on a scale where 0 very unlikely and 10 is very likely to recommend



Recent experience with NIE Networks

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

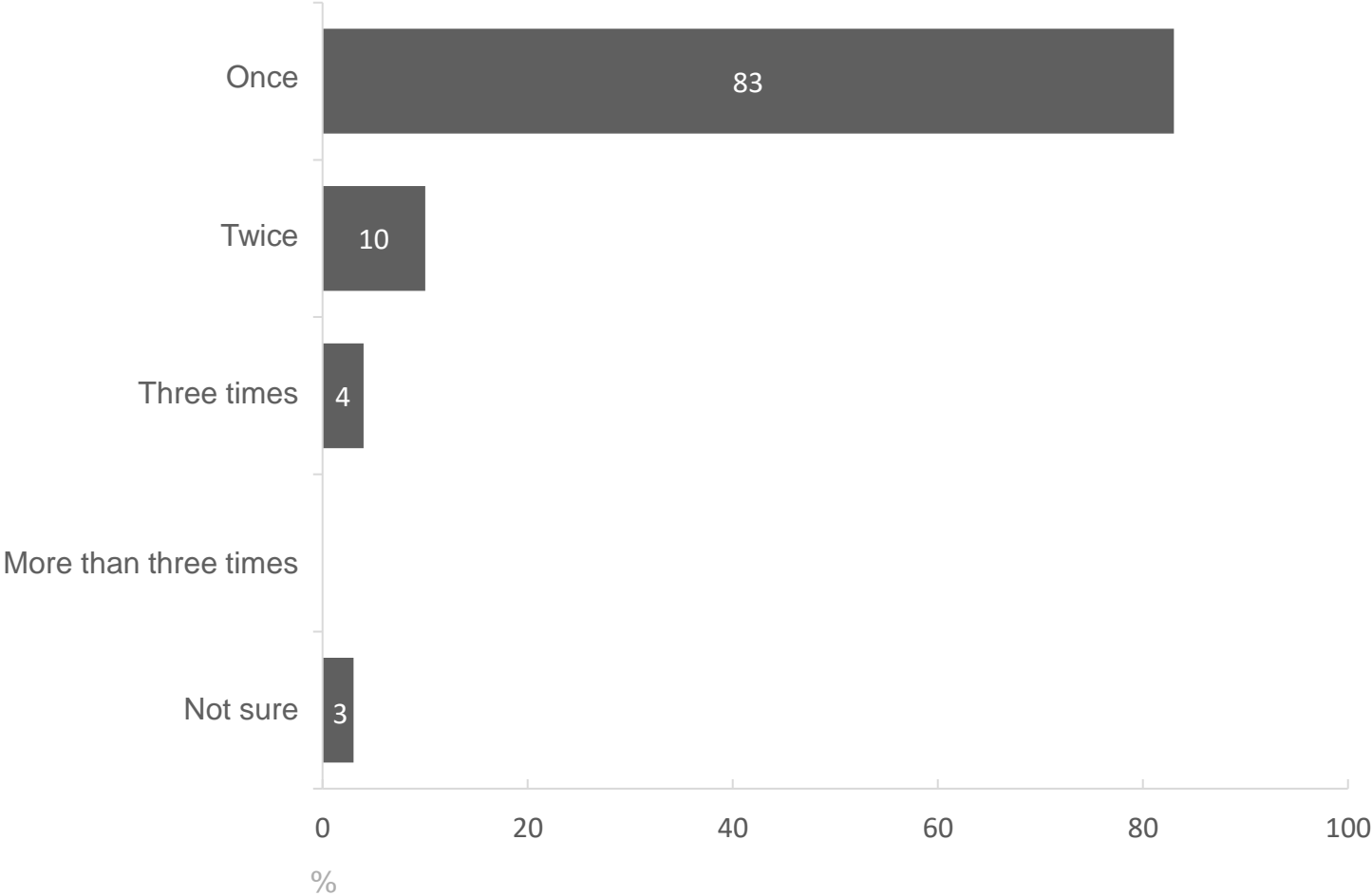
Base 510: All respondents. Weighted data



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

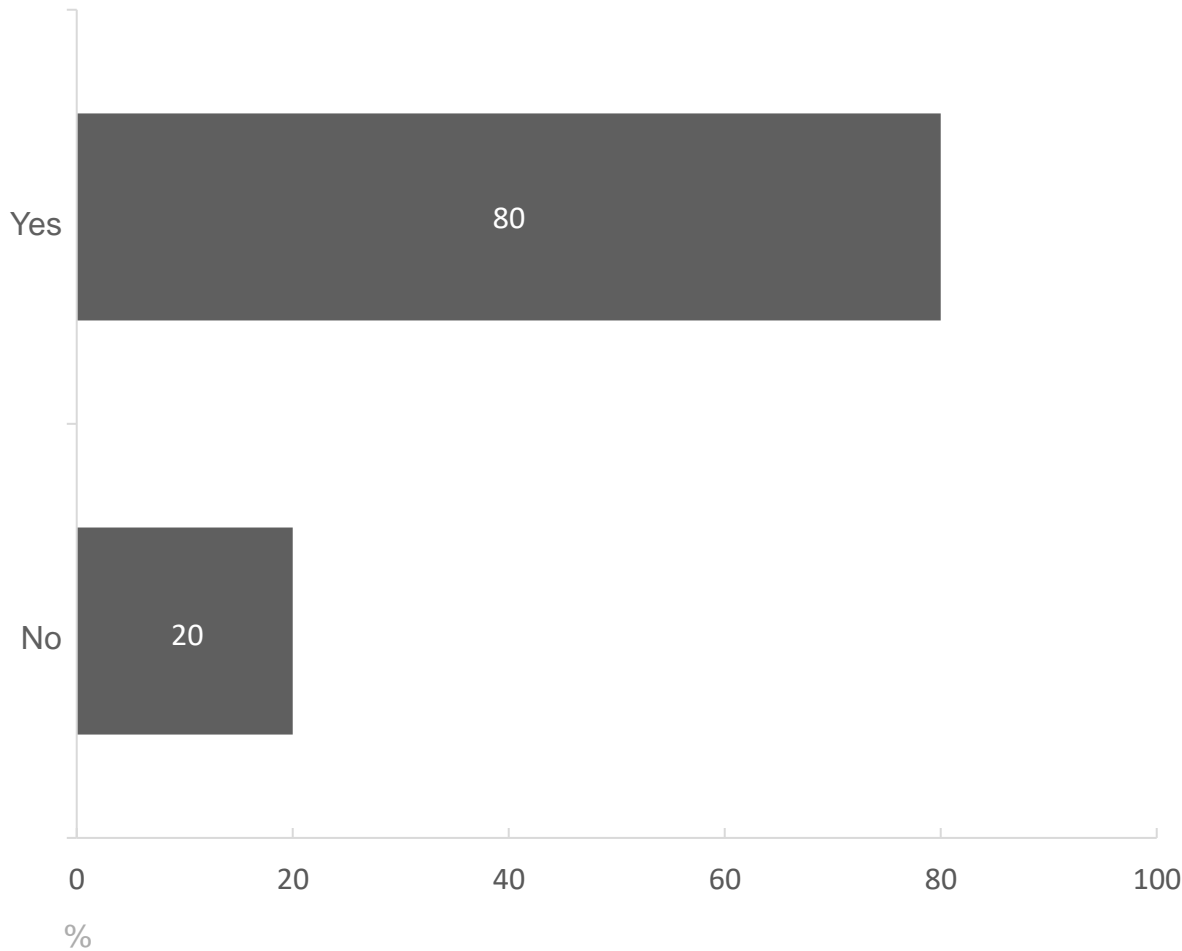
C2 Thinking about the last 12 months, how many times have you experienced a planned power cut?

Base 71: Respondents that have experienced a planned power cut



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

Base 510: All respondents



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 510: All respondents

	All preferences	1 st preference	2 nd preference
Notification card through your front door	86%	75%	11%
Letter	40%	6%	33%
Text message	26%	10%	16%
Telephone - personal	18%	3%	15%
Email	13%	4%	9%
In person	6%	-	6%
Power check on NIE Networks' website	5%	1%	5%
NIE Networks' Facebook	2%	-	1%
Telephone - automated	1%	-	1%
NIE Networks' Twitter	-	-	-
Other (includes 'any method that is direct and prompt)	2%	-	2%

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.

	1 st preference		2 nd preference	
	2019 Base = 510	2015 Base = 1205	2019 Base = 510	2015 Base = 1205
Notification card through your front door	75%	70%	11%	16%
Letter	6%	8%	33%	27%
Text message	10%	11%	16%	17%
Telephone - personal	3%	5%	15%	20%
Email	4%	5%	9%	10%
In person	-	1%	6%	6%
Power check on NIE Networks' website*	1%	-	5%	1%
NIE Networks' Facebook**	-	-	1%	-
Telephone - automated	-	-	1%	2%
NIE Networks' Twitter**	-	-	-	-
Other (includes 'any method that is direct and prompt)	-	-	2%	1%

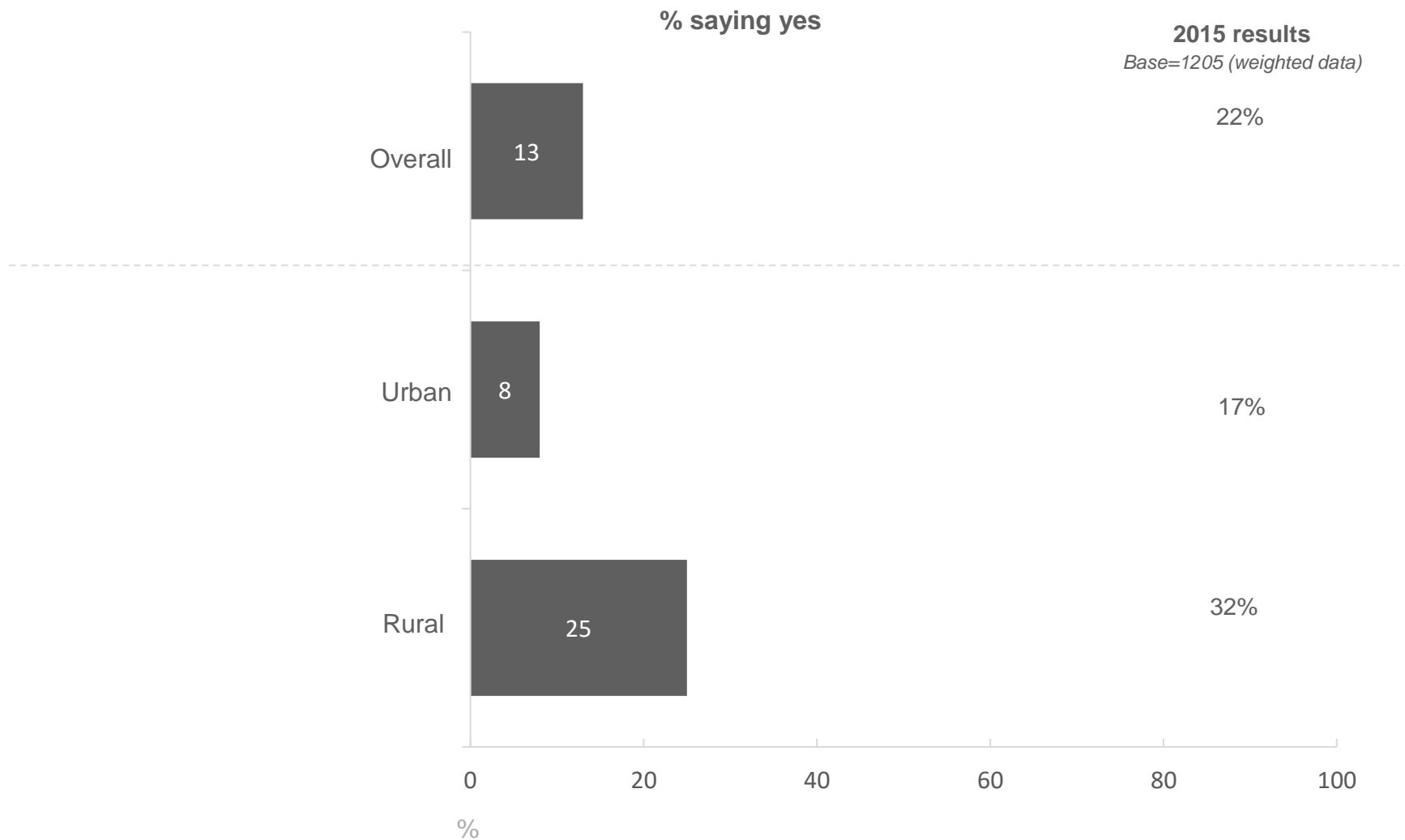
¹ Multiple response question, therefore percentages add to >100%

* Asked as 'NIE Website' in 2015

** Not asked in 2015

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

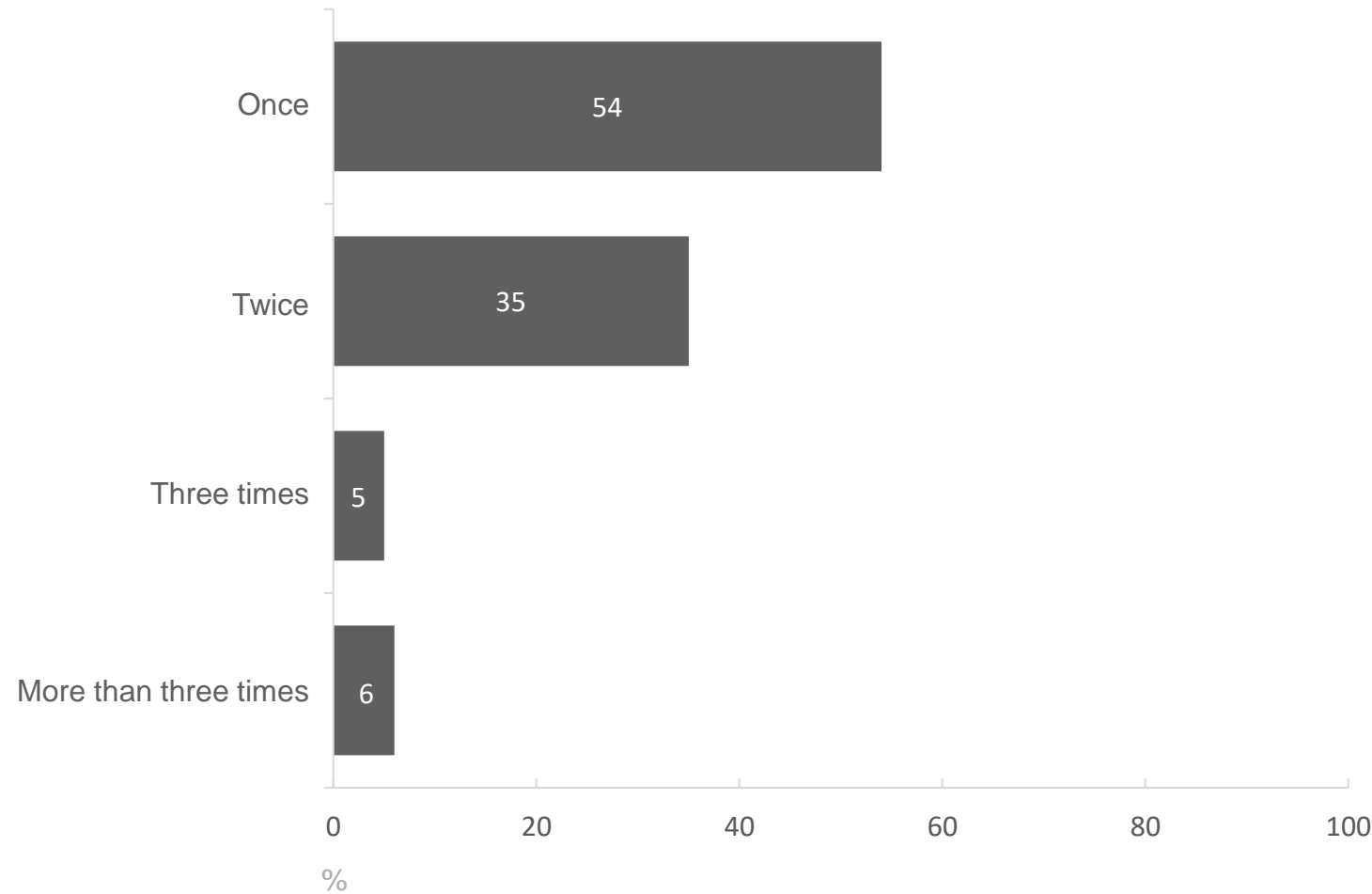
Base 510: All respondents.



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

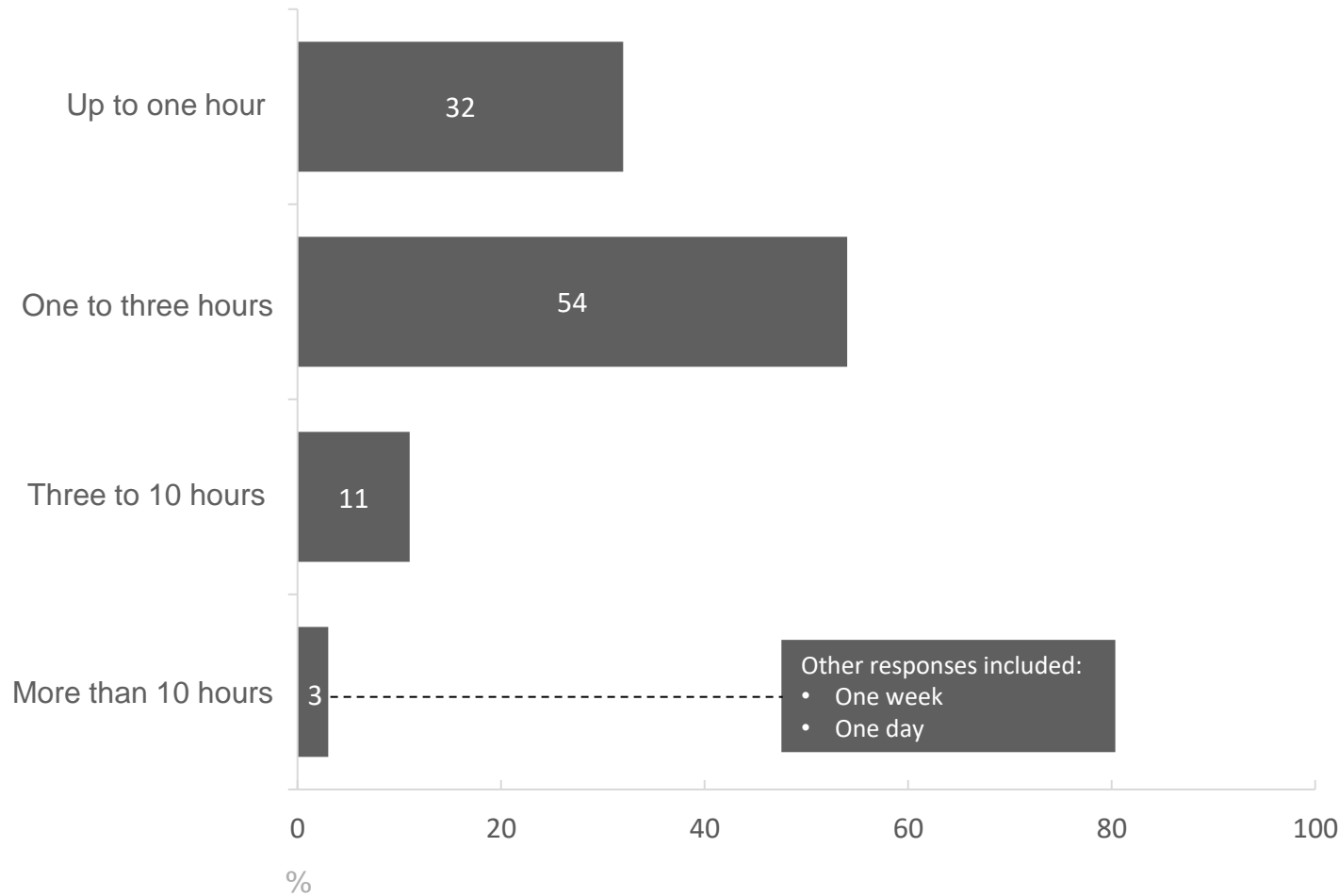
C6 Thinking about the last 12 months, how many times have you experienced an unplanned power cut?

Base 65: Respondents that have experienced an unplanned power cut



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

Base 65: Respondents that have experienced an unplanned power cut

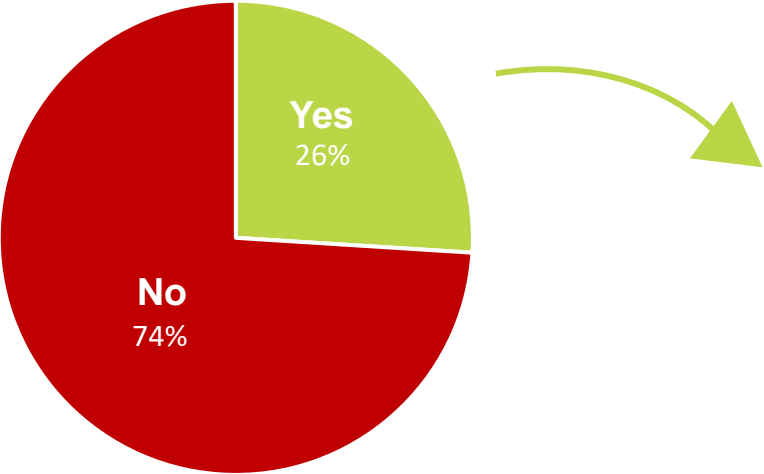


C8, C9 Reporting of unplanned power cuts

NB: Low bases
Individual bases listed below.

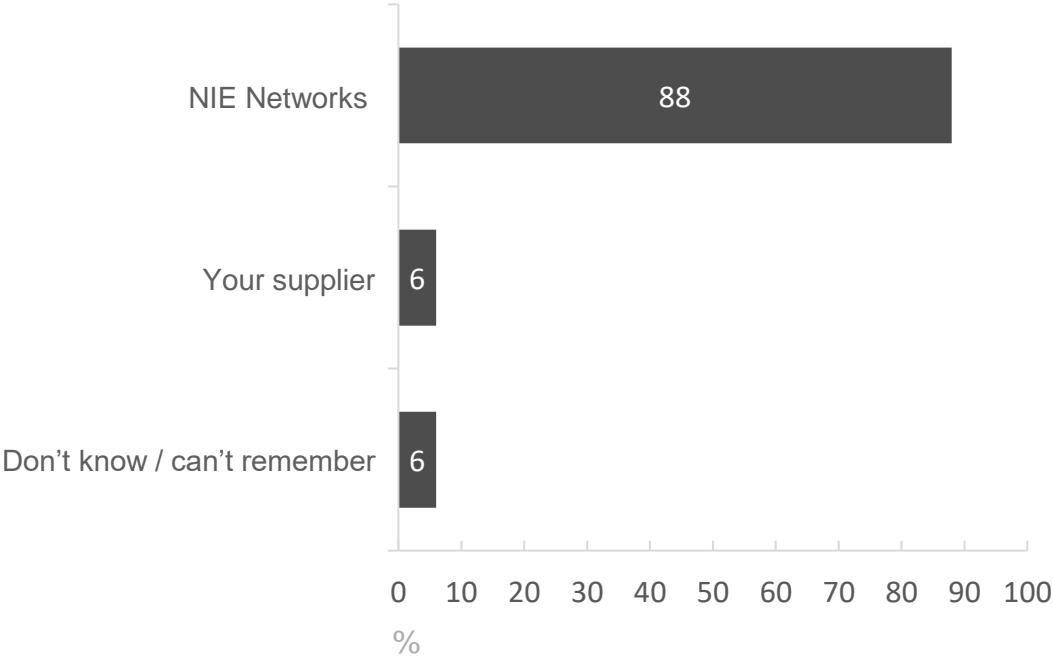
C8 Did you report any of these unplanned power cuts?

Base 65: Respondents that have experienced an unplanned power cut



C9 Who did you report the power cut to?

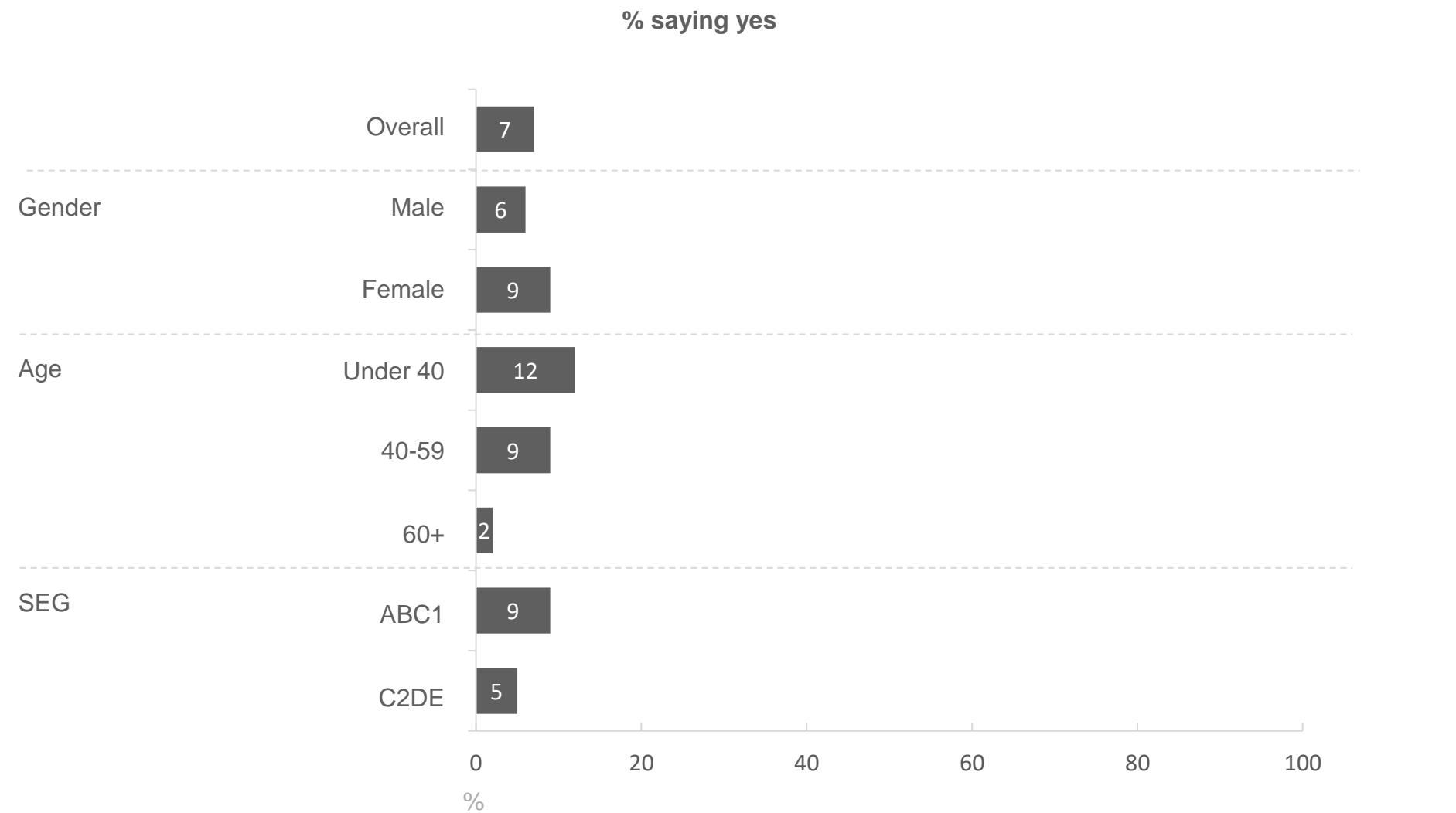
Base 17: Respondents that reported an unplanned power cut



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

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

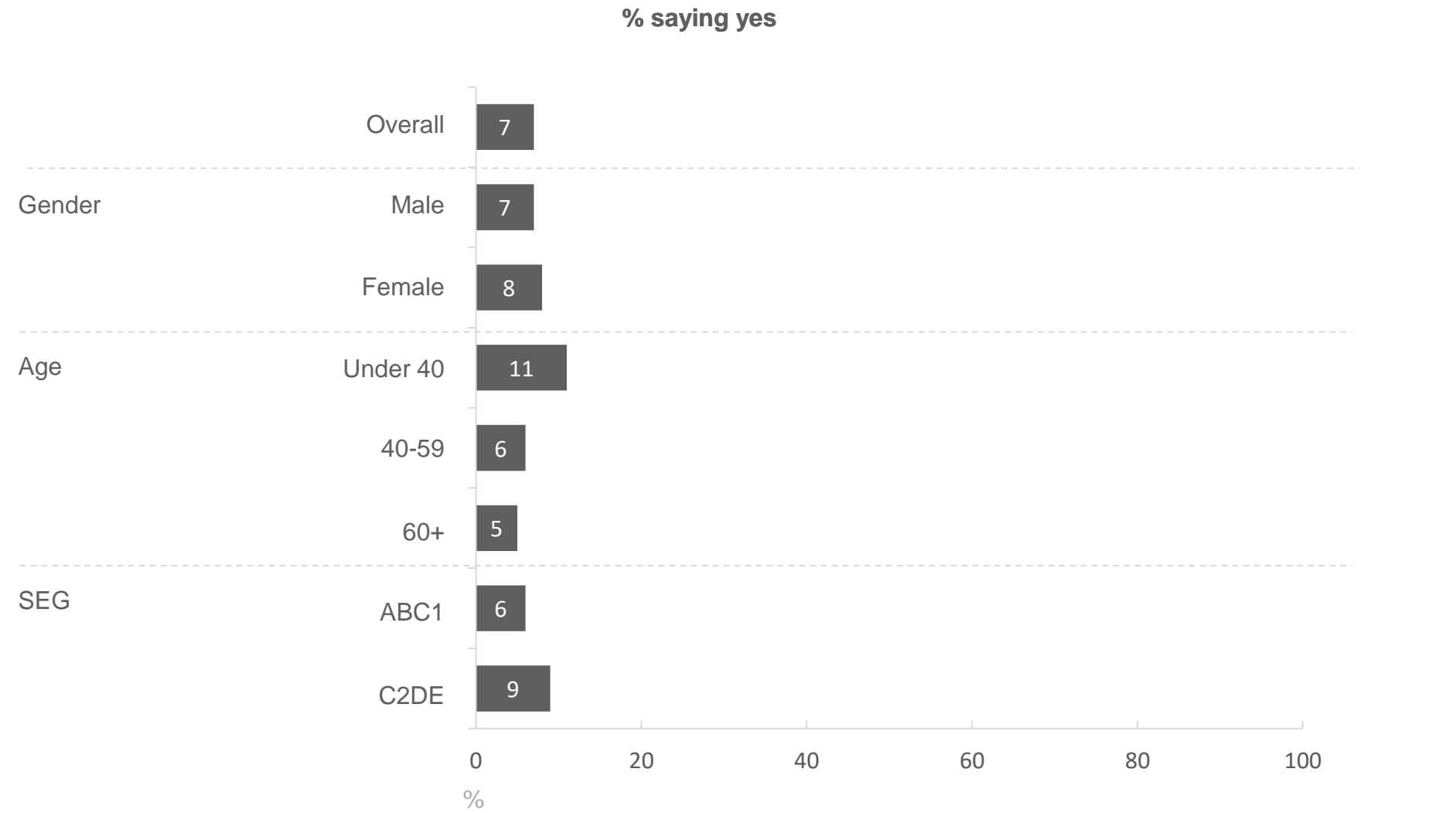
Base 510: All respondents



¹ 2011 census

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 510: All respondents

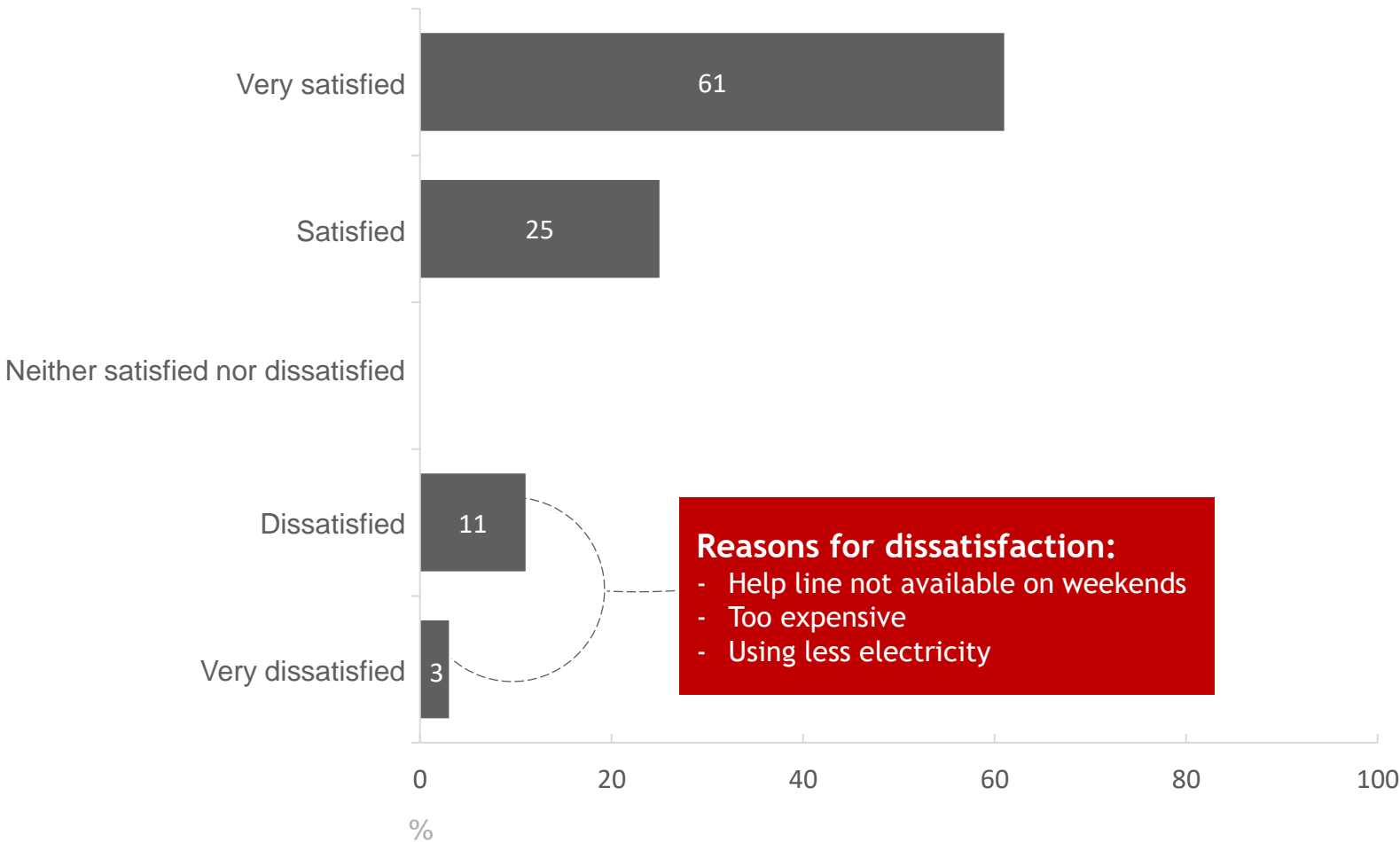


¹ 2011 census *A new connection may be interpreted as changing supplier

C14 How satisfied or dissatisfied were you with this application process?

NB: Low base

Base 36: Respondents that have made an application



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

Base 510: All respondents

Strongly disagree Disagree Agree Strongly agree

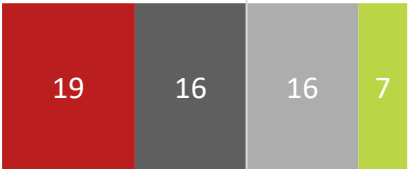
Neither agree / disagree

'Bird fouling from overhead powerlines is an issue to my home'



27%

'Bird fouling from overhead powerlines is something that NIE Networks should be responsible for'



42%

-80 -60 -40 -20 0 20 40 60
%



Contact & communication channels

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

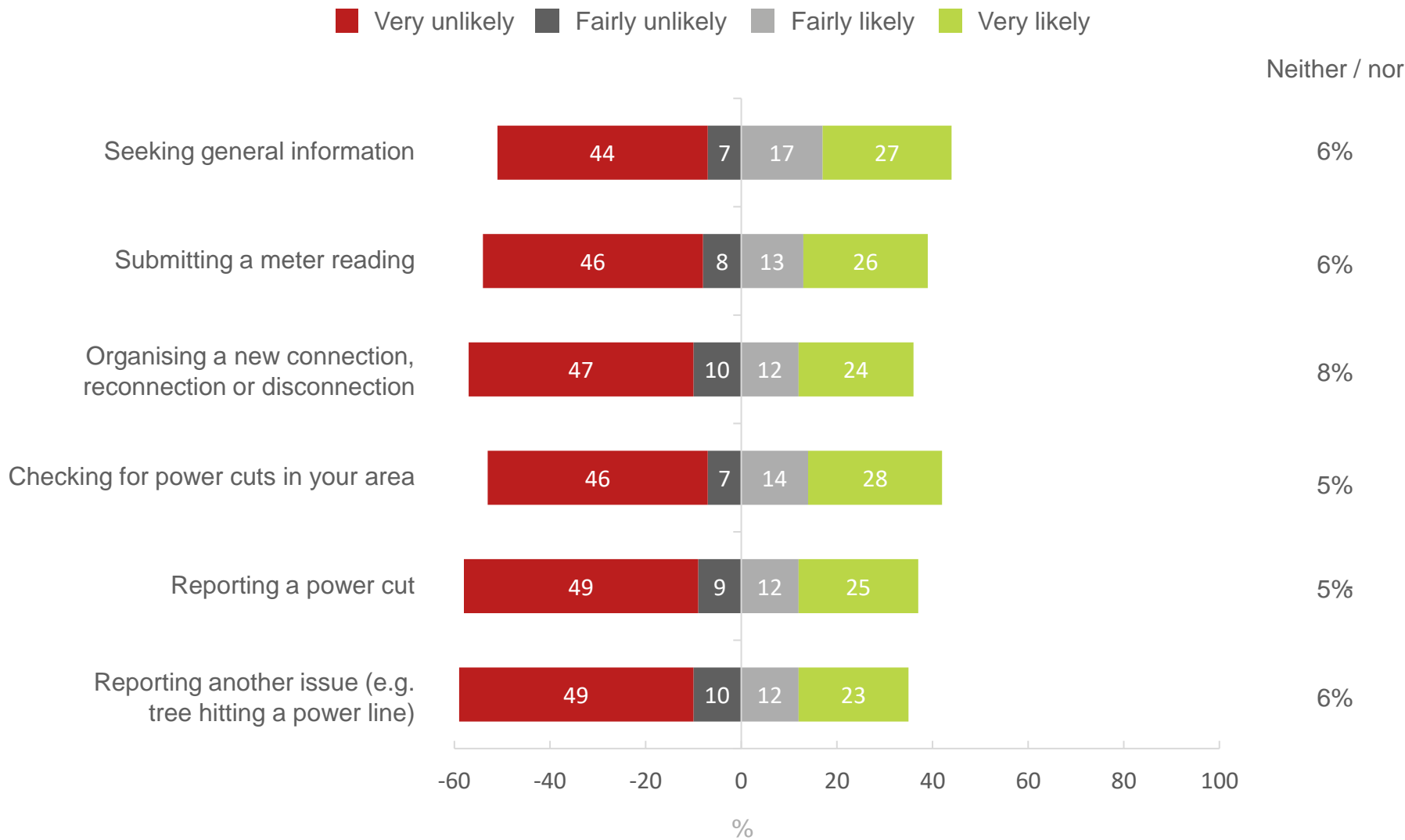
Base 510: All respondents.

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

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

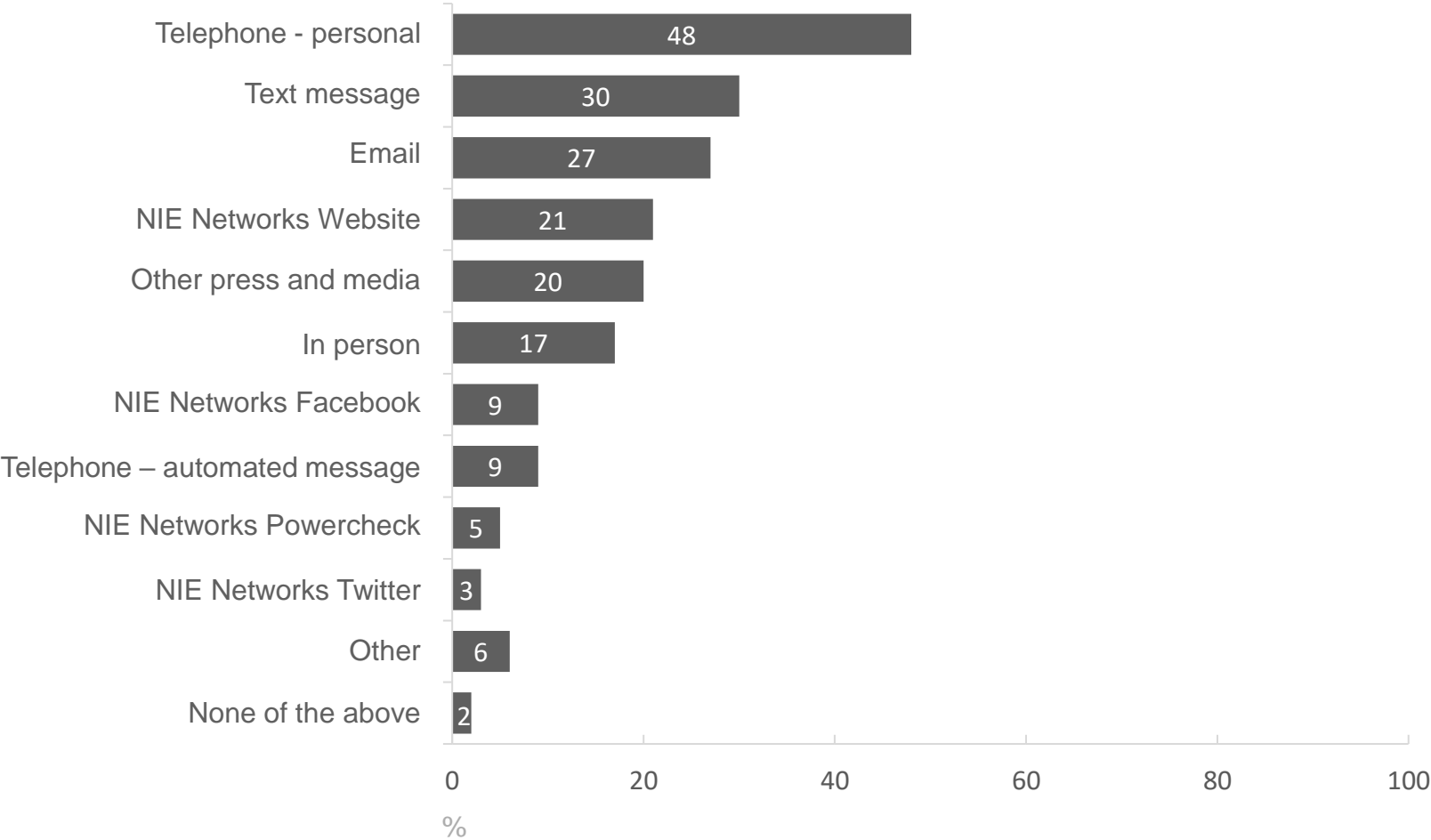
D2 How likely, or not, would you be to interact with NIE Networks using online methods for the following circumstances?

Base 510: All respondents

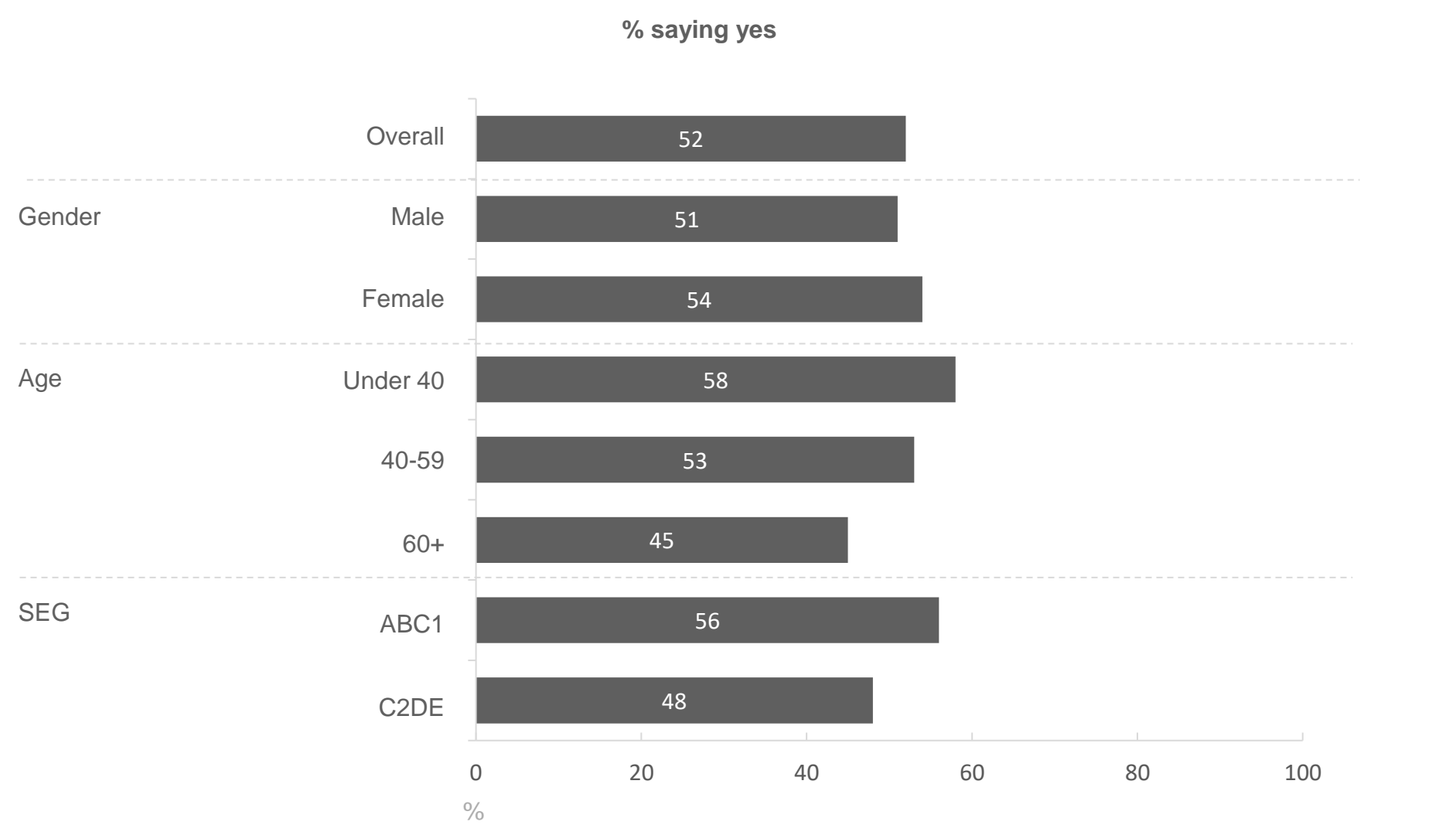


D3 Following initial contact with NIE Networks to report an issue, which of the following methods of communication are acceptable for NIE Networks to keep you up to date?

Base 510: All respondents



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 510: All respondents



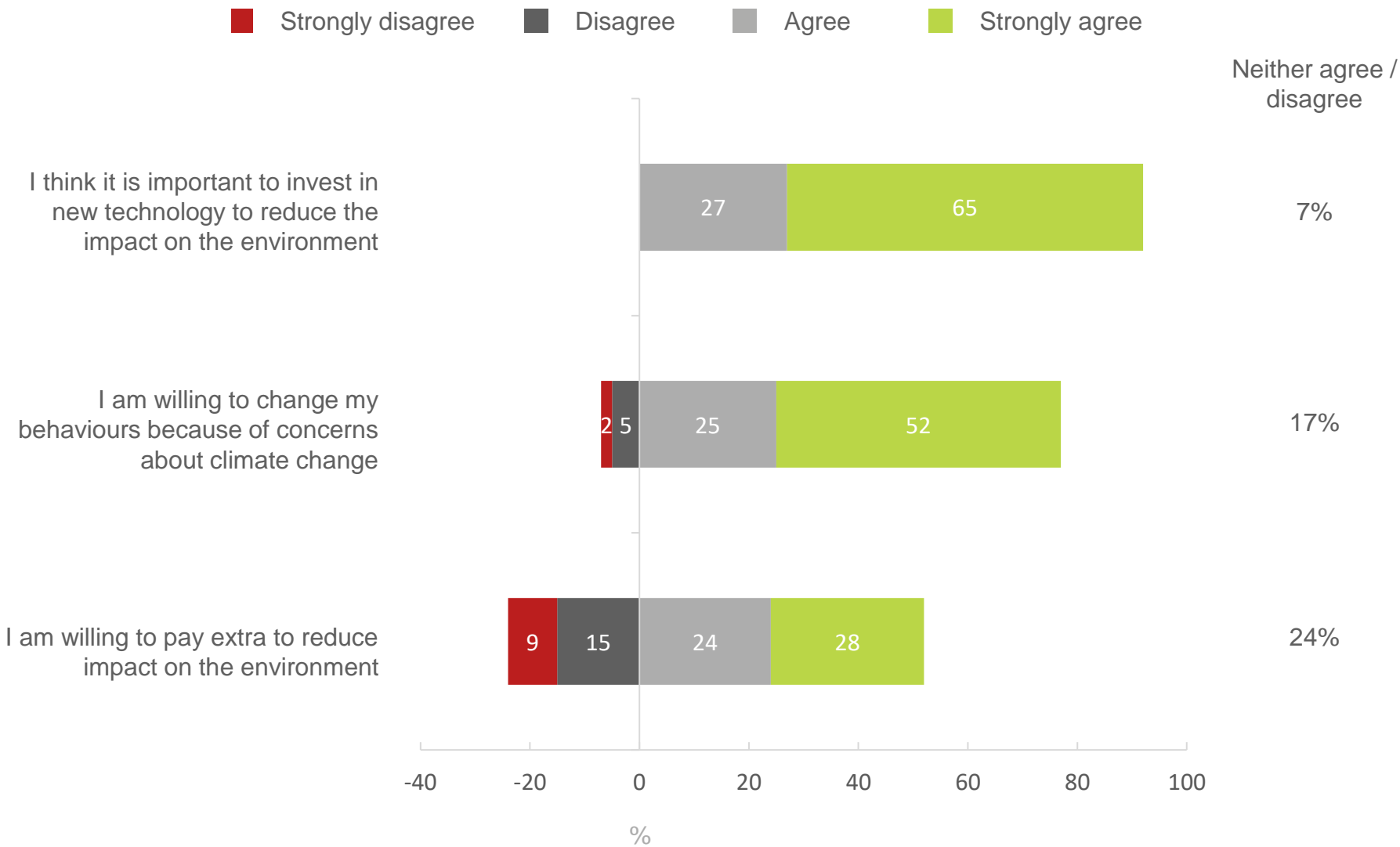
¹ 2011 census



Future networks

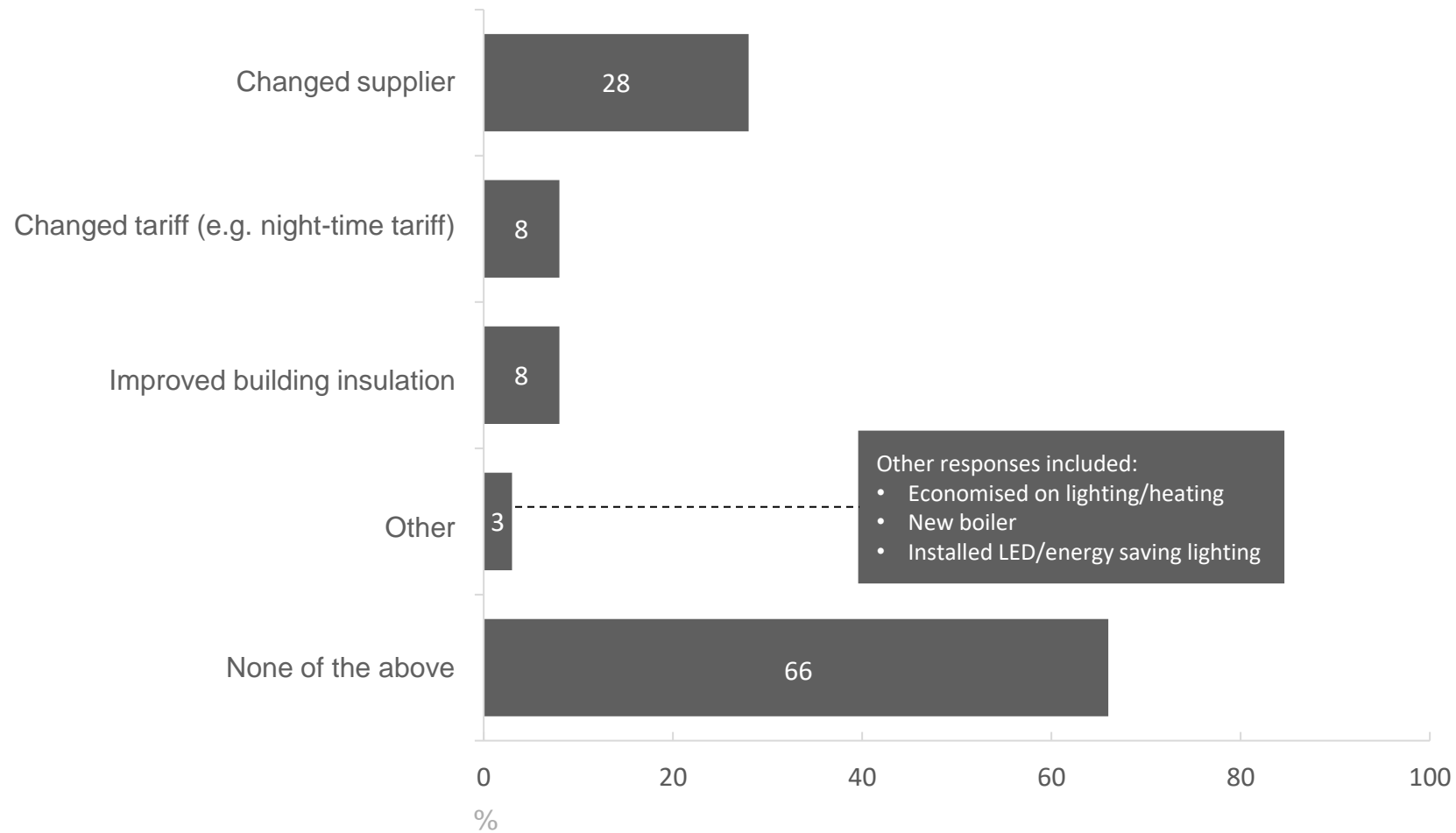
E1 To what extent do you agree or disagree with the following statements?

Base 510: All respondents



E2 In the last three years have you or your household done any of the following to reduce your electricity use or bill?

Base 510: All respondents

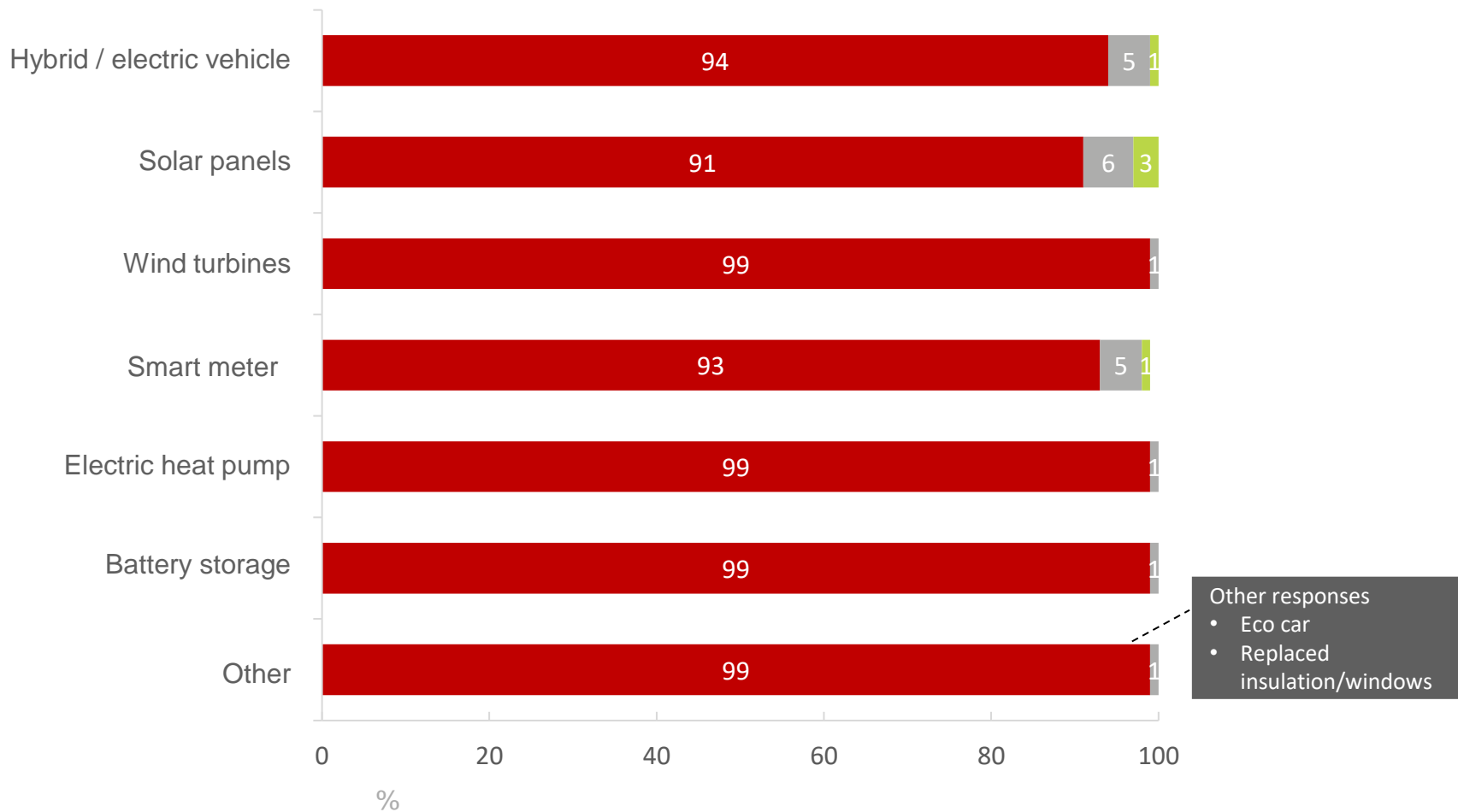


¹ Multiple response question, therefore percentages add to >100%

E3 Do you or your household currently have any of the following? And do you plan to have any in the next 3 years?

Base 510: All respondents

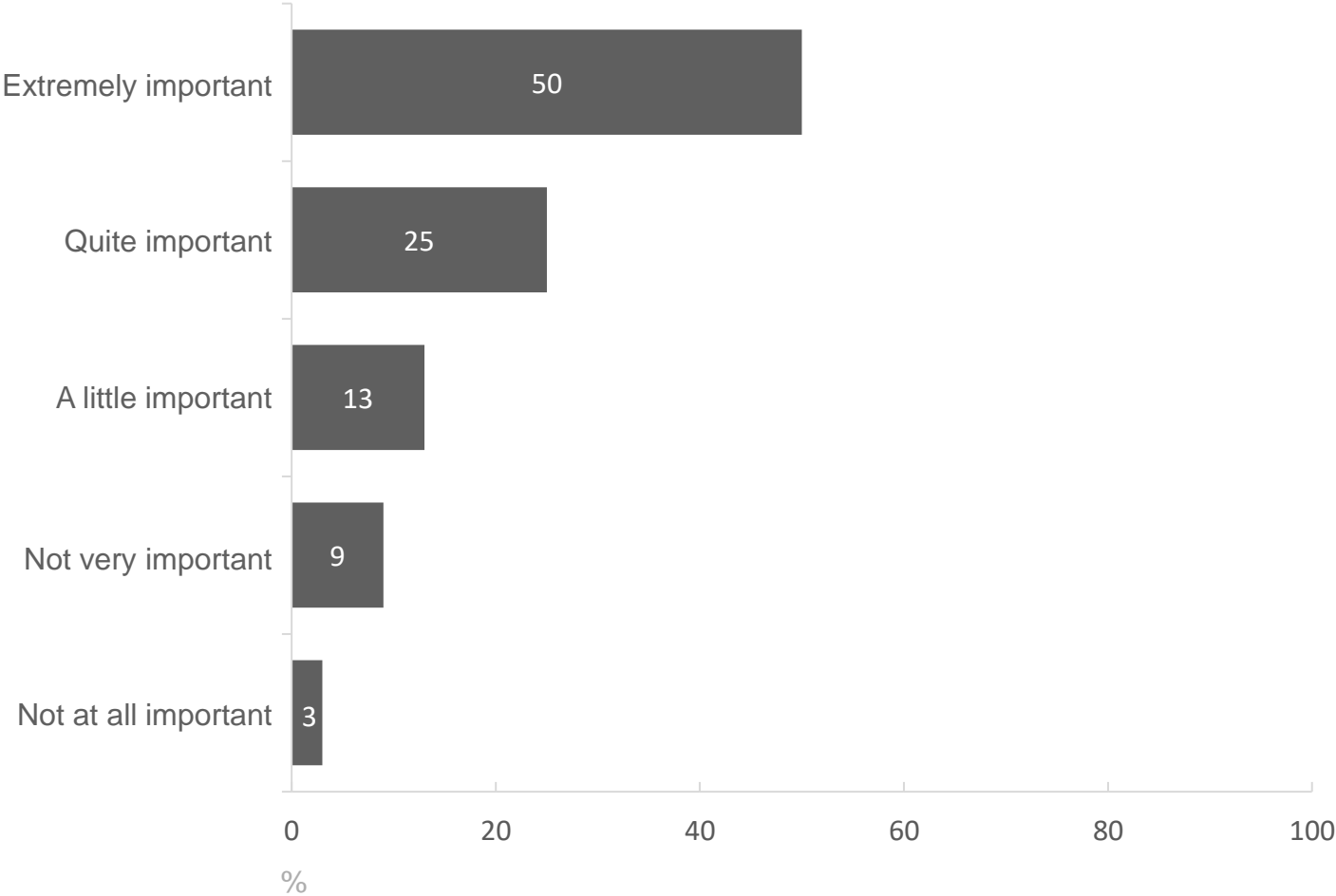
No plans in next three years Plan to have Currently have



¹ 2 respondents currently have and 1 respondent plans to have other environmentally friendly technologies, however due to rounding these appear as 0%

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

Base 510: All respondents





Summary of findings

Perceptions and views of NIE Networks

Comparisons to other service providers

- NIE Networks scores fairly well in terms of trustworthiness and communication, when compared against other organisations.
- Although rated below the GP and Royal Mail, NIE Networks is rated similar to electricity suppliers and above NI Water, the bank, phone and broadband providers, and the local council.

Understanding of NIE Networks' role

- When initially asked, over one third (35%) of respondents were unsure of the role of NIE Networks.
- 62% 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 quarter (23%) of respondents believe that bird fouling from overhead lines should be the responsibility of NIE Networks.

Overall satisfaction with NIE Networks

- 56% of respondents would speak highly of NIE Networks, a slight increase from the 2015 study (52%). Just 2% would be critical.
- Respondents were provided with a number of statements about NIE Networks and were asked to comment on their level of agreement/disagreement. Overall, customers were positive, with 3% or under disagreeing with the statements.

Recent experience with NIE Networks

Experience of planned power cuts

- 14% of respondents have experienced a planned power cut in the past 12 months, decreasing from 20% in 2015.
- 2% of respondents experienced a planned power cut more than once in the past year.
- The majority of respondents (86%) confirmed that a notification card is an appropriate way to inform them of a planned power cut.
- There has been a slight decrease in preference for communication methods from 2015, including:
 - **Letter** (6% reported this as their first preference, compared to 8% in 2015)
 - **Personal telephone call** (3% reported this to be their first preference, compared to 5% in 2015)

Experience of unplanned power cuts

- 13% of respondents experienced an unplanned power cut, down from 22% in 2015.
- 6% of respondents said that they experienced an unplanned power cut more than once, with 86% reporting the power cut lasted up to three hours.
- One quarter (26%) of respondents who experienced an unplanned power cut reported it. The majority of this group (88%) reported the power cut to NIE Networks.
- Just 7% were dissatisfied with the outcome of this interaction, compared to 93% who were satisfied.
- Reasons for dissatisfaction with the interaction included:
 - Help line not available on weekends
 - Too expensive to call

Preference for future contact and communication

Most preferred methods of interaction

- **For general enquiries:**
 1. Personal phone call (47% prefer)
 2. NIE Networks website (29% prefer)
- **For submitting a meter reading:**
 1. Personal phone call (33% prefer)
 2. Other (20% prefer)
- **For organising a (dis/re) connection:**
 1. Personal phone call (65% prefer)
 2. NIE Network website (16% prefer)
- **For checking for power cuts:**
 1. Personal phone call (44% prefer)
 2. NIE Networks website (32% prefer)
- **For reporting a power cut:**
 1. Personal phone call (67% prefer)
 2. NIE Networks website (18% prefer)
- **For reporting another issue:**
 1. Personal phone call (75% prefer)
 2. NIE Networks website (11% prefer)

Likelihood to use alternative platforms

- Generally, there is increased tolerance for being updated on a reported issue through digital platforms, in particular:
 1. **Other press and media**
20% find acceptable, up from 7% in 2015
 2. **Email**
27% find acceptable, up from 17% in 2015
 3. **NIE Networks website**
21% find acceptable, up 12% from 2015
 4. **NIE Networks Facebook**
9% find acceptable, up from 4% in 2015
- Over half of respondents (52%) 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 (down from 68% in 2015).

Investment priorities for the future

Personal views on climate change

- 75% consider climate change either extremely or quite important. 13% place little importance on climate change and 12% have low or no personal motivation to issues relating to climate change.
- In saying this, the vast majority (92%) of respondents agree that it is important to invest in new technology to reduce environmental impacts.
- Whilst climate change resonates with respondents, not everyone is willing to pay extra to reduce their environmental impact.
- Despite 77% saying they are willing to change their behaviours, just over half (52%) would be willing to pay extra to reduce their environmental impact.

Actions taken to reduce electricity bill/use

- In the last three years, two thirds of respondents (66%) have not made any changes to reduce their electricity use or bill.
- This compares to:
 - ✓ 28% who have changed their electricity supplier;
 - ✓ 8% who have changed tariff;
 - ✓ 8% that have improved building insulation; and
 - ✓ 3% who have implemented the following: economised on lighting/ heating, installed a new boiler or installed energy saving lightbulbs.

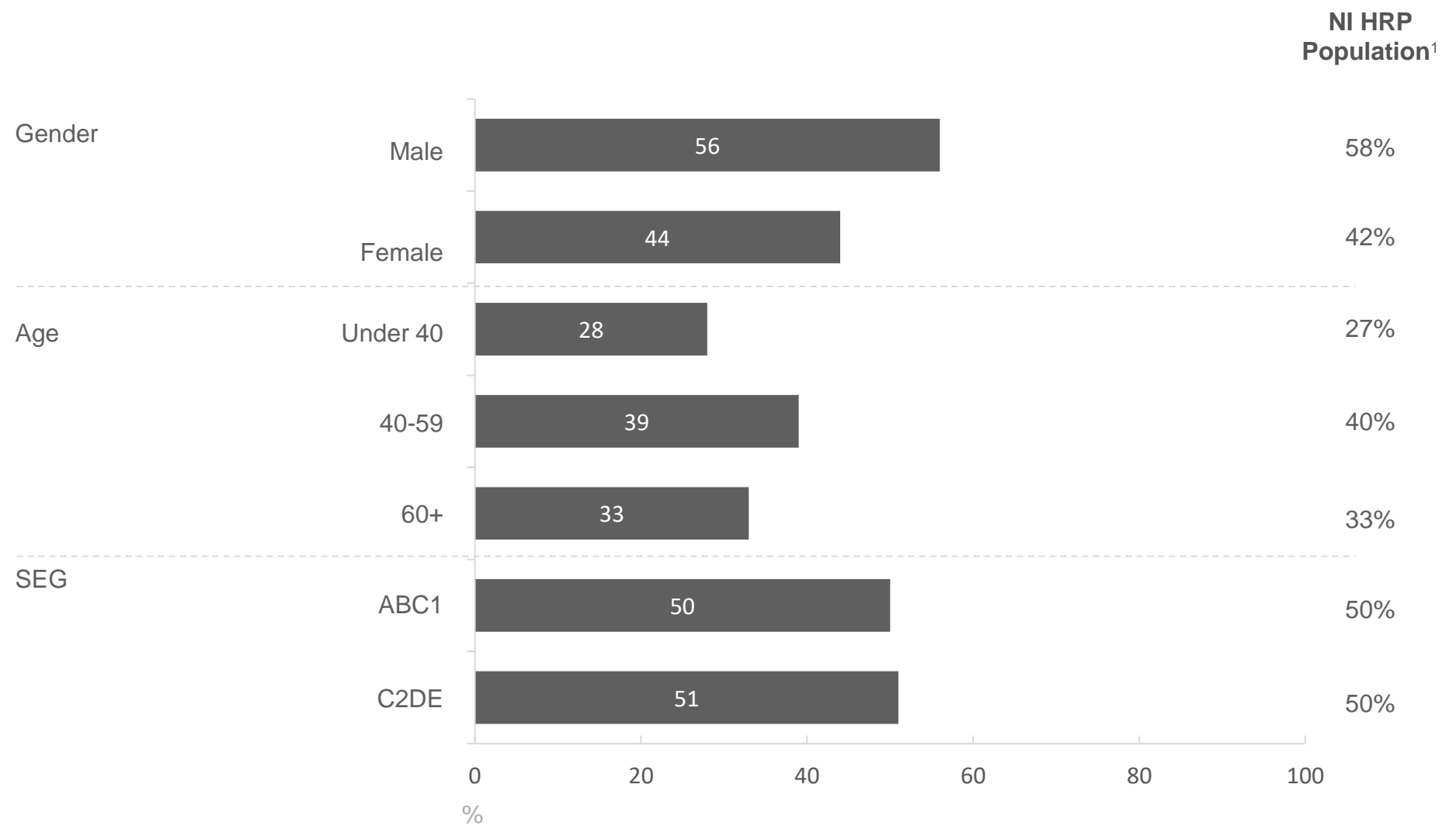
Uptake of low carbon technologies

- 16% currently have or are planning to install one or more of the following within the next three years:
- **Hybrid/electric vehicle:** 1% currently have, 5% plan to
- **Solar panels:** 3% currently have, 6% plan to
- **Wind turbines:** none currently have, 1% plan to
- **Smart meters:** 1% currently have, 5% plan to
- **Electric heat pump:** none currently have, 1% plan to
- **Battery storage:** none currently have, 1% plan to

Appendix - Respondent profile

Respondent profile

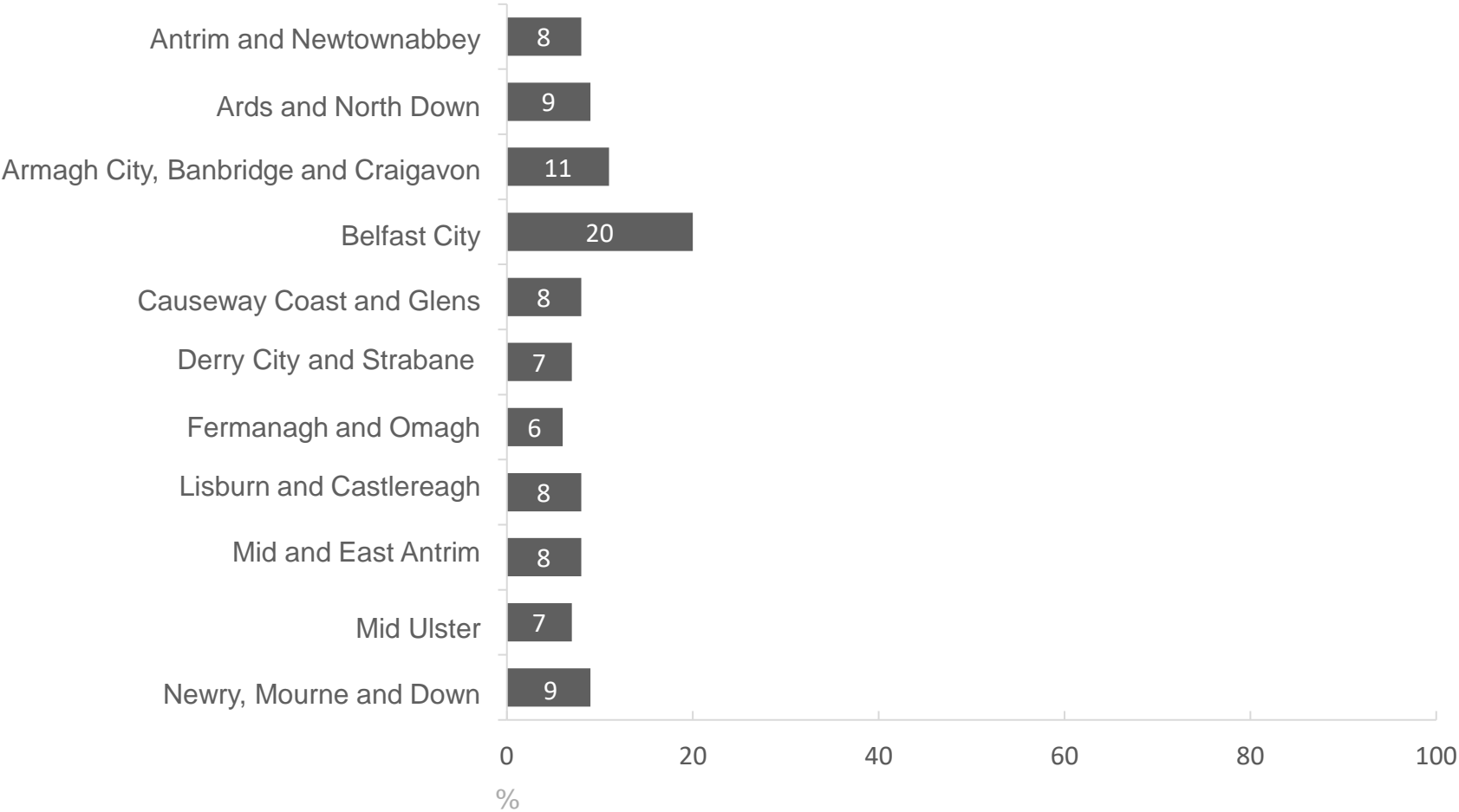
Base 510: All respondents



¹ 2011 census

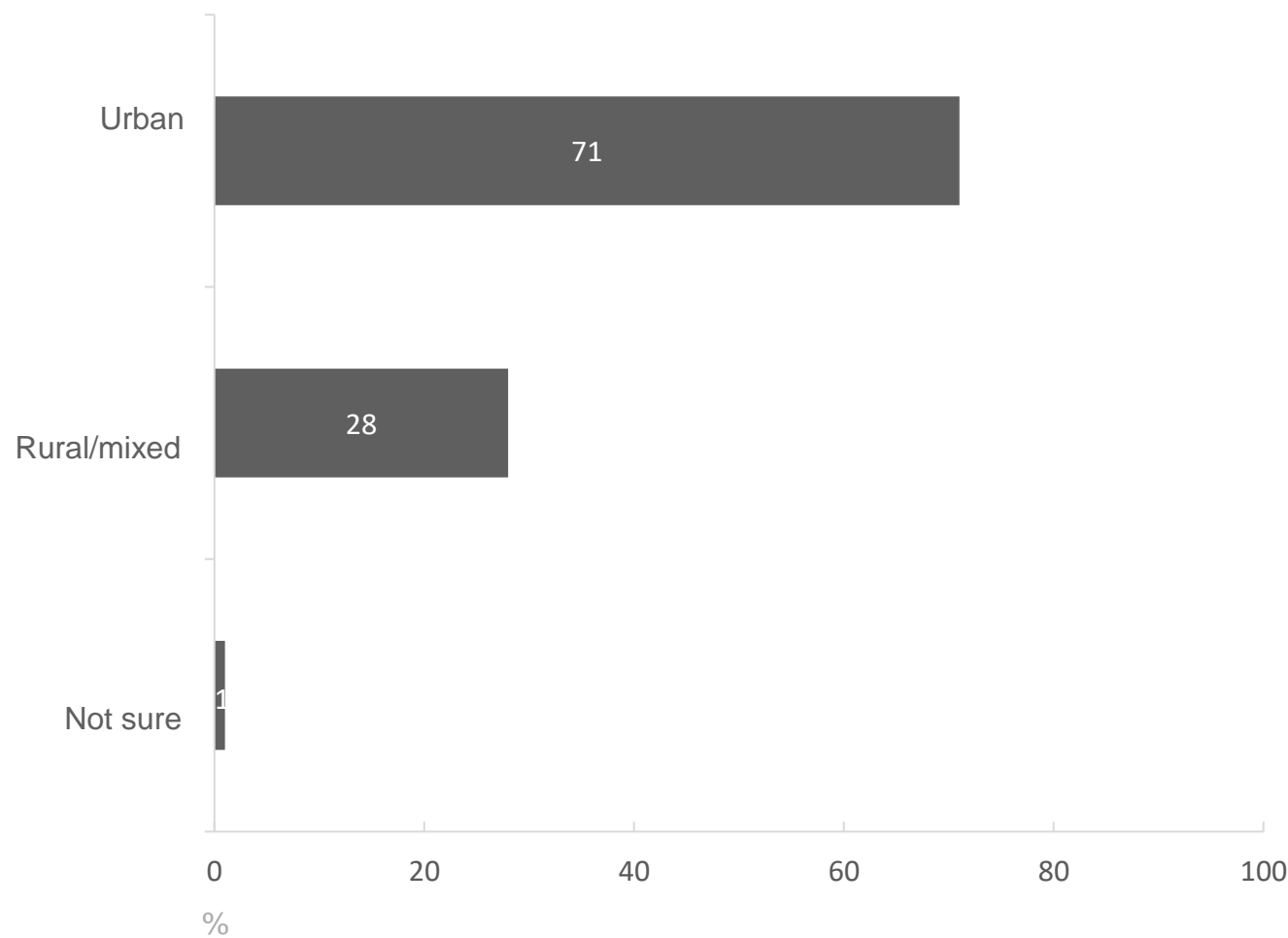
Location of interview

Base 510: All respondents



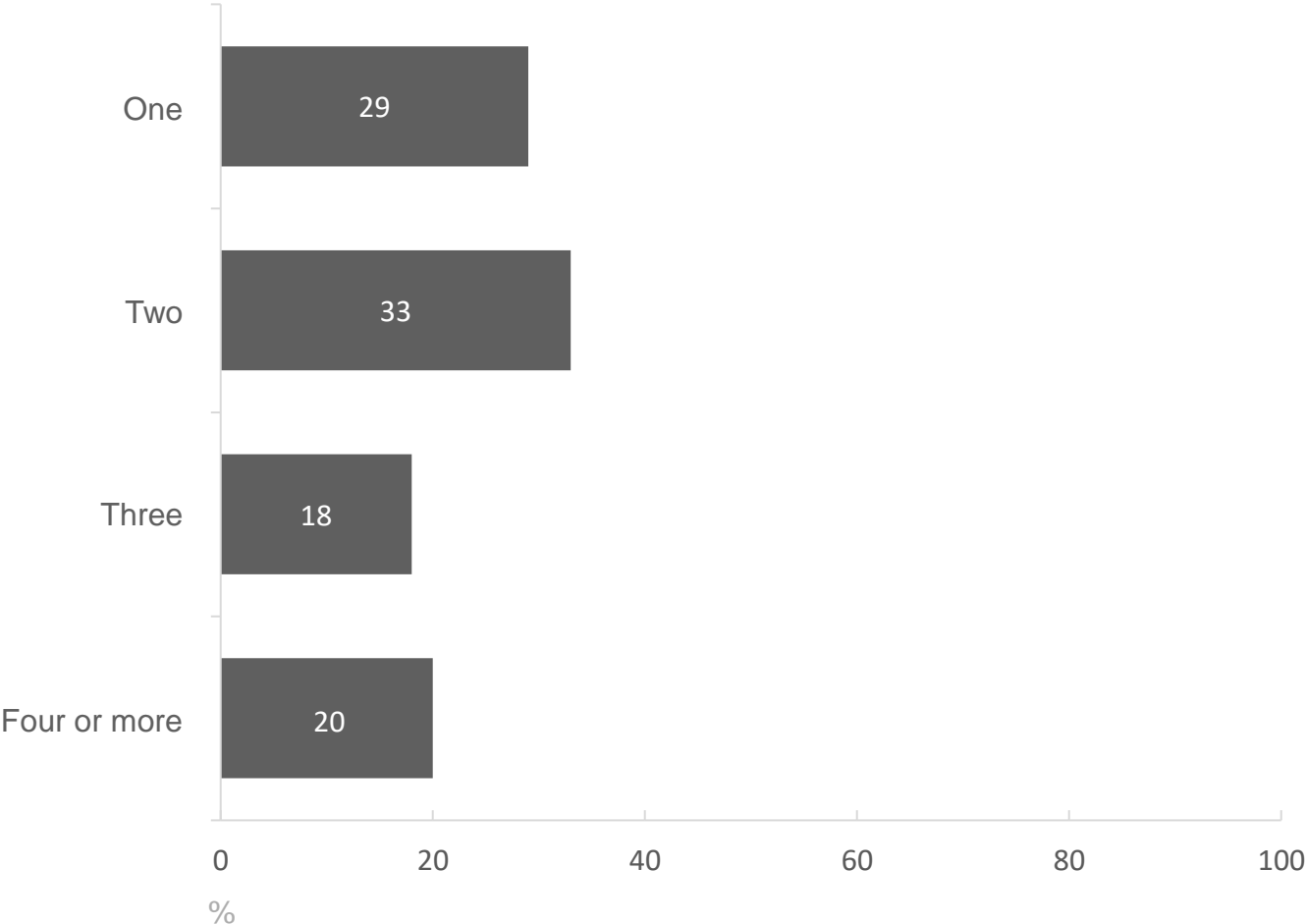
S1 Do you consider the place where you live to be in an urban or rural location?

Base 204: All respondents



F1 Including yourself, how many people live in your household?

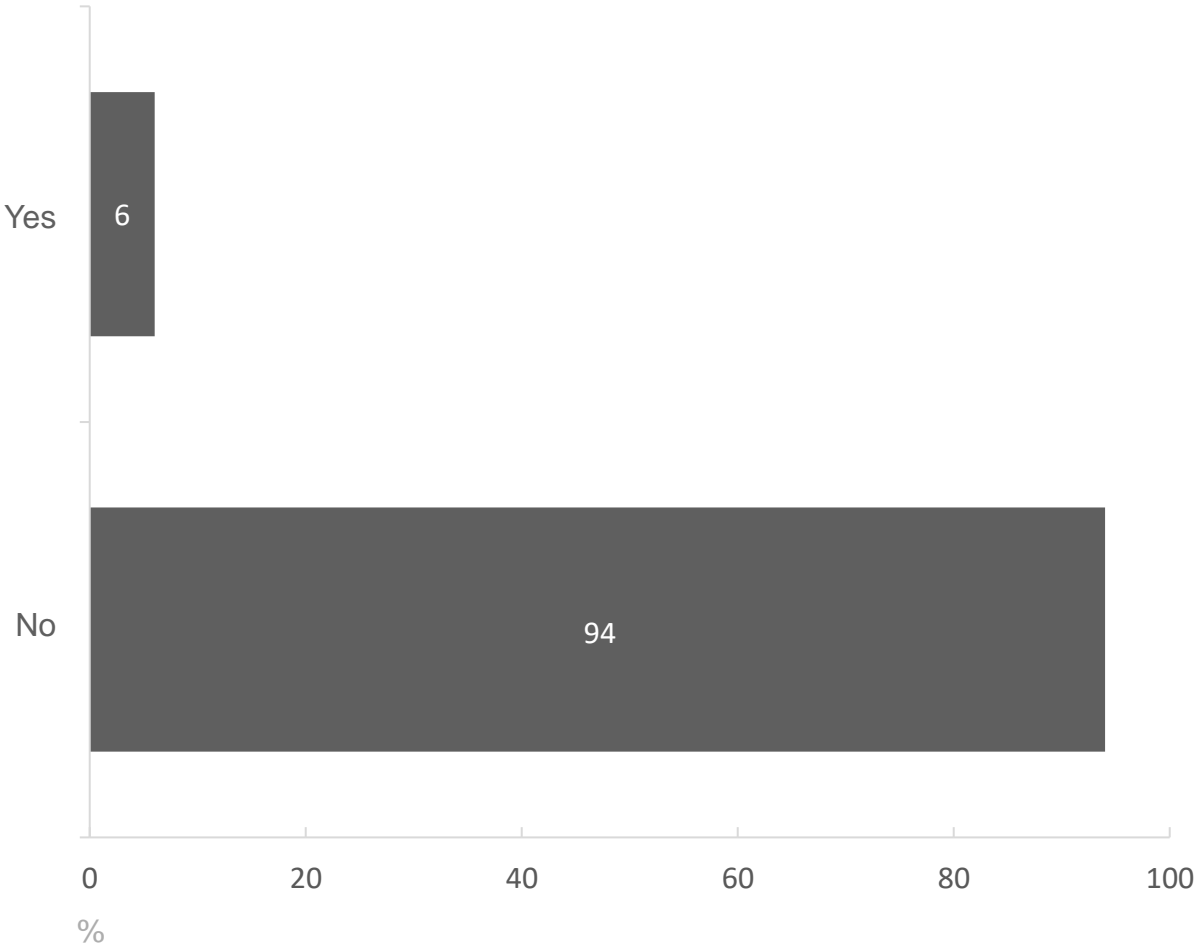
Base 510: All respondents



¹ Due to rounding, percentages add to 101%

F2 Is any member of your household dependent on electricity for their healthcare needs?

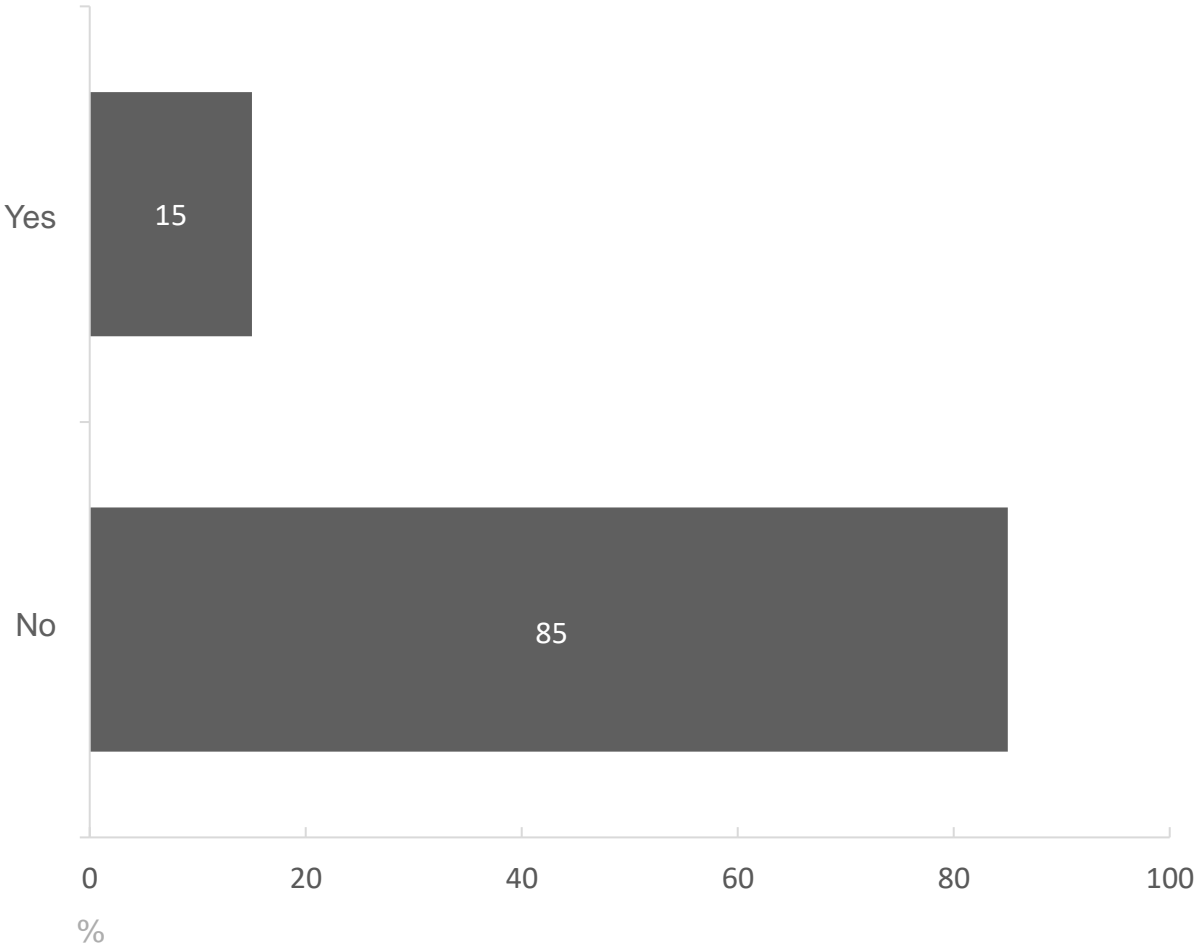
Base 510: All respondents



¹ Due to rounding, percentages add to 101%

F3 Are you aware that NIE Networks has a Medical Customer Care Register for people who are dependent on electricity for healthcare needs?

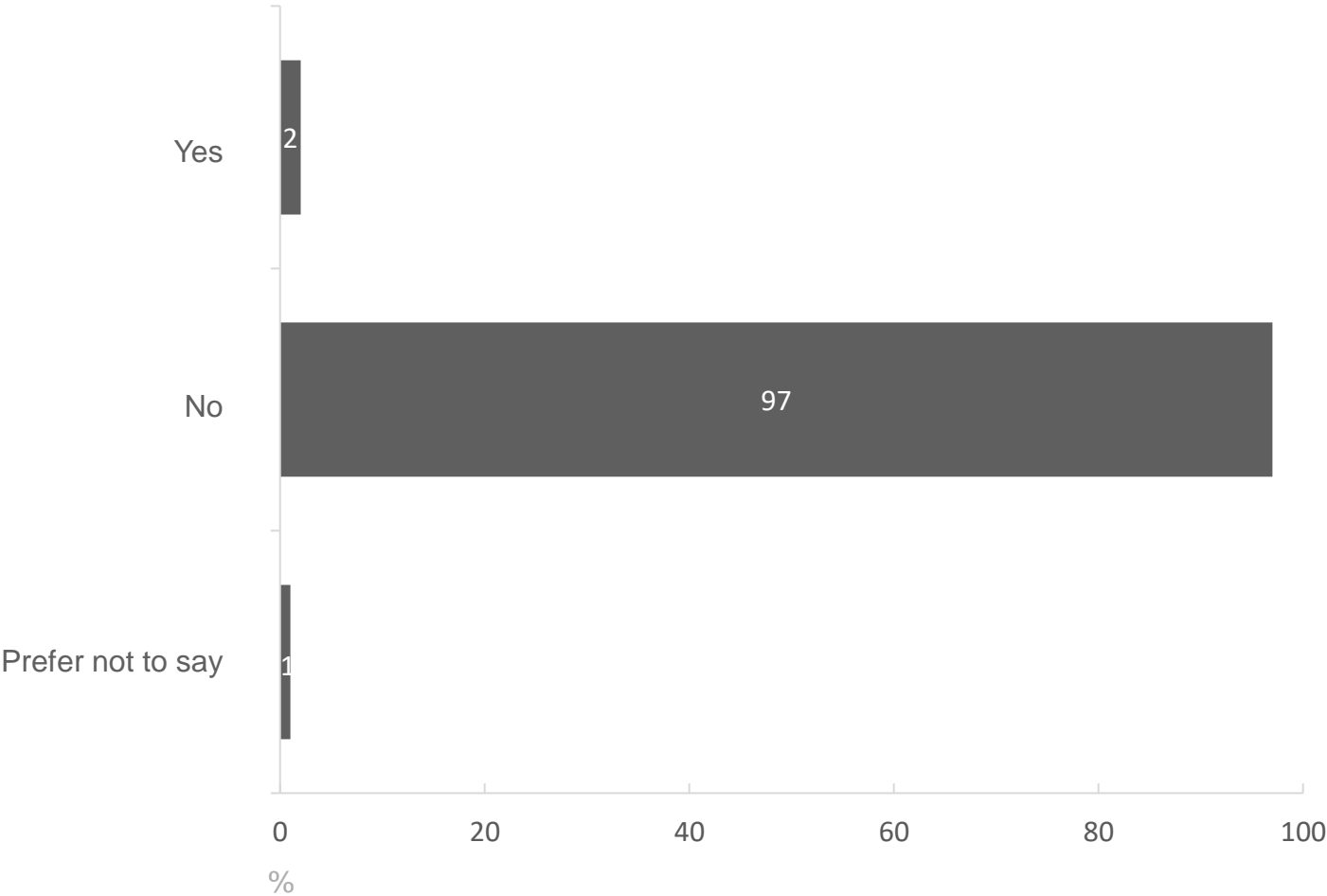
Base 510: All respondents



¹ Due to rounding, percentages add to 101%

F4 Is any member of your household on the Medical Customer Care Register held by NIE Networks?

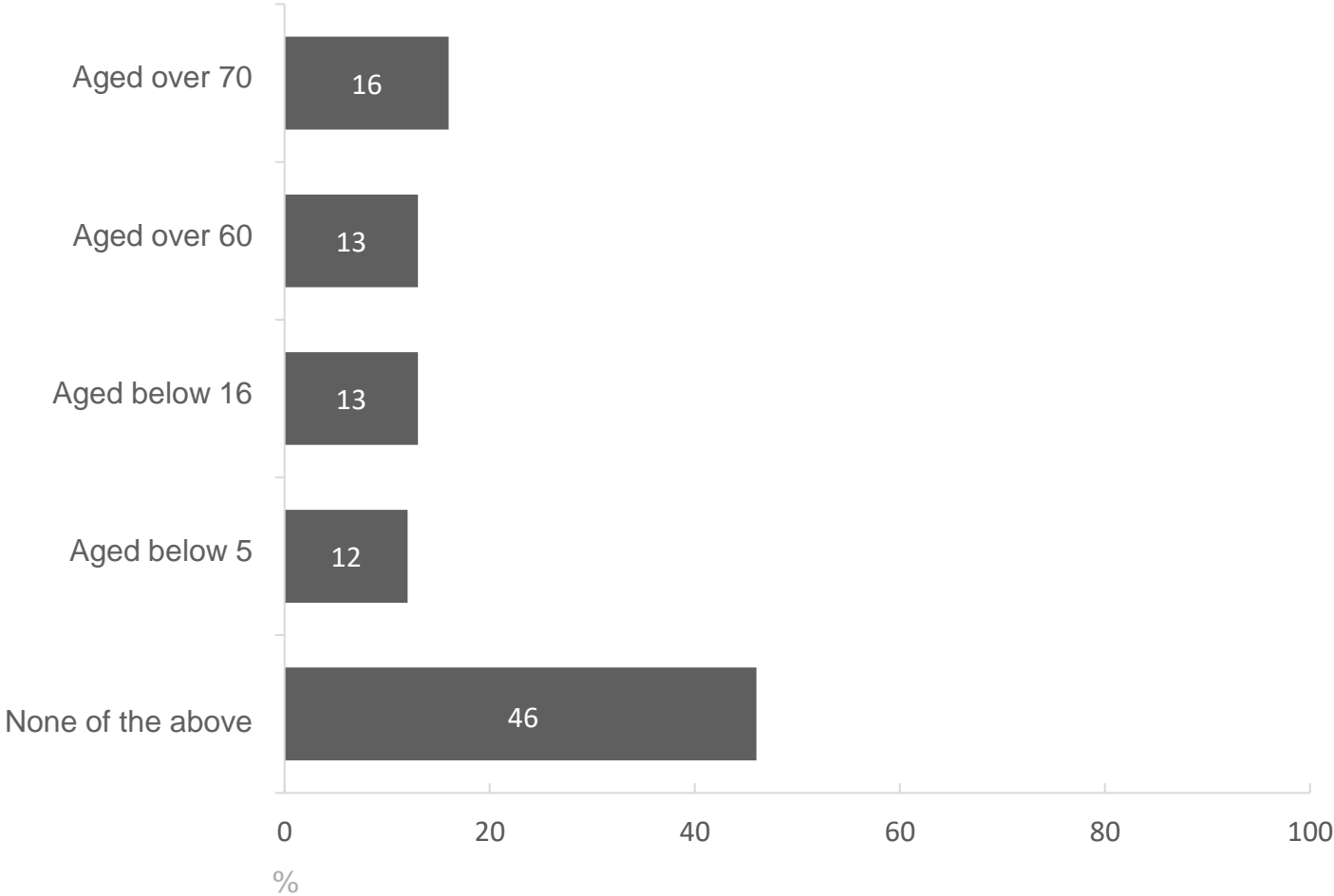
Base 510: All respondents



¹ Due to rounding, percentages add to 101%

F5 Is there anyone living at this household...?

Base 510: All respondents

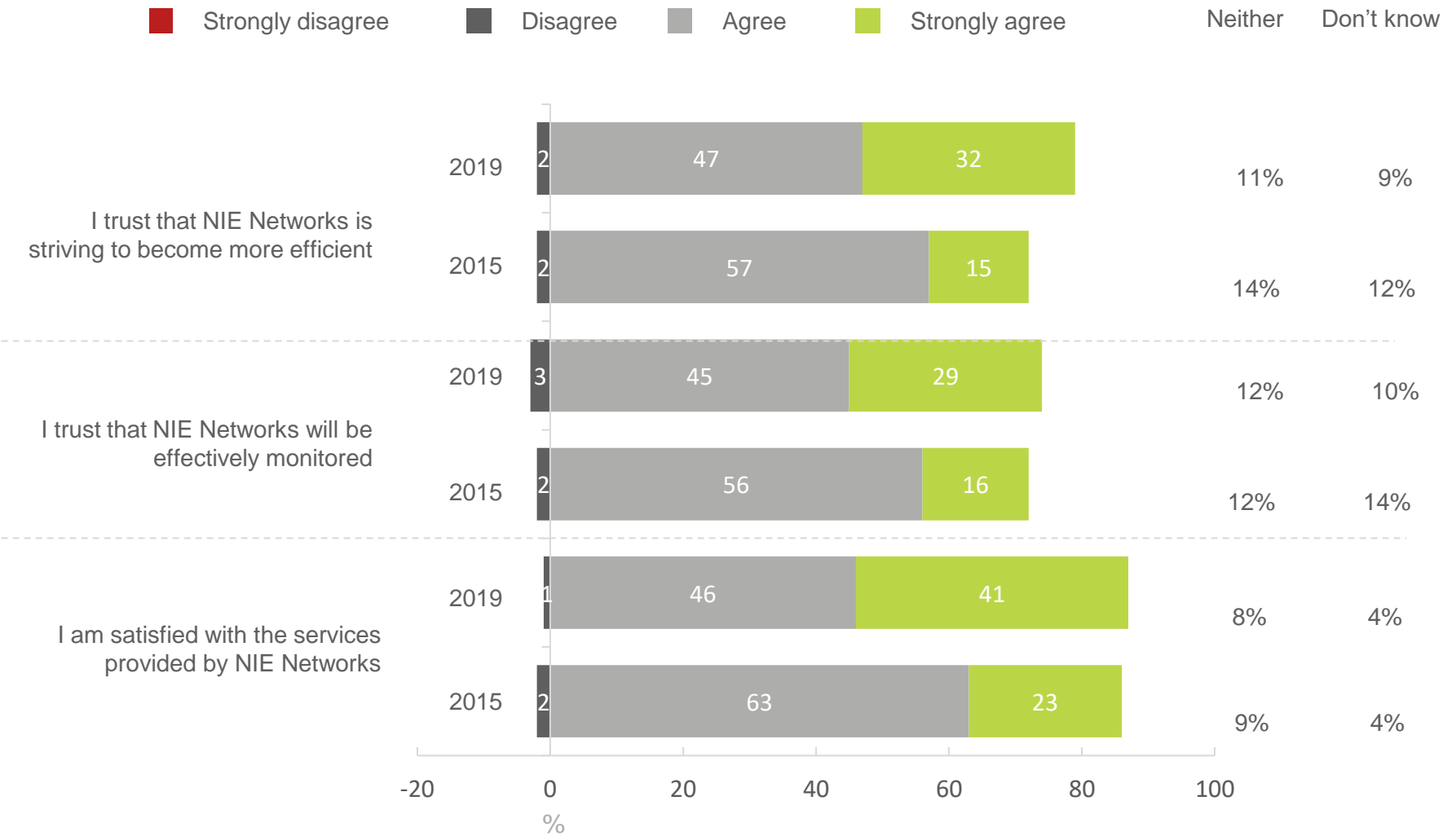


¹ Due to rounding, percentages add to 101%

Appendix - additional insights

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

2019: Base 510: All respondents
2015: Base 1,206: All respondents

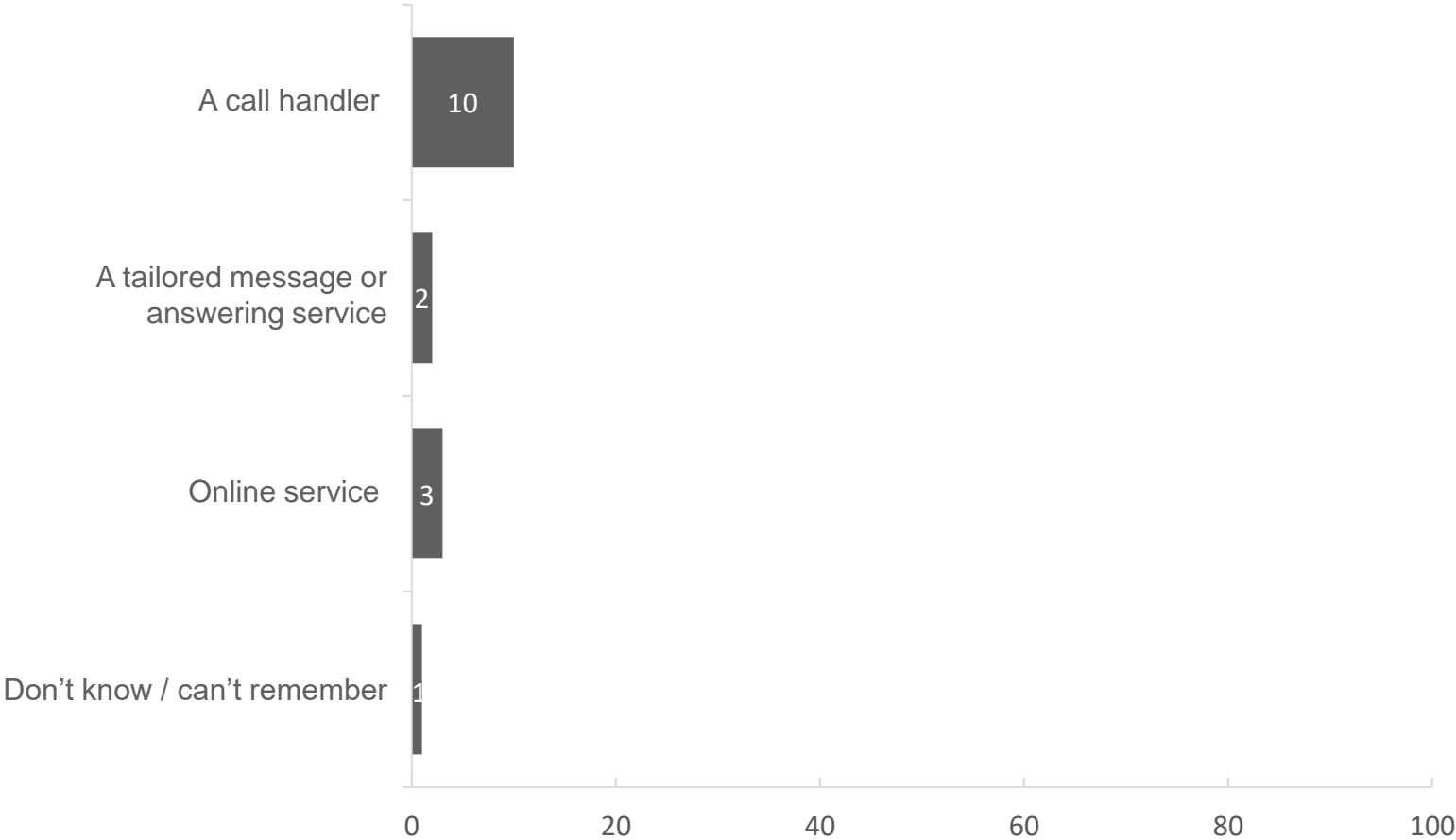


¹ Due to rounding, percentages add to 99%

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

Base 15: Respondents that reported an unplanned power cut to NIE Networks

NB: Low base (data displayed as counts)



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

Individual bases below

NB: Low base (data displayed as counts)

