



# Northern Ireland consumer attitudes to energy transition issues

March 2021

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# Executive Summary

## Background

The Consumer Council appointed Social Market Research to undertake qualitative research into Northern Ireland consumer attitudes to energy transition issues. The research comprised 11 focus groups, one in each Council area. Each focus group contained eight participants giving 88 in all.

The main themes discussed in the focus groups were:

- Energy transition;
- Renewable energy;
- Community energy schemes;
- Low carbon power generation;
- Energy efficient technology;
- Low Carbon Heating; and
- Transport.

## General Views on Energy Transition

Awareness of energy transition was generally low. Most consumers were aware that there were targets for reducing carbon emissions, but few had any detailed knowledge of what it involved. The main benefit that consumers envisaged was lower cost. Lower cost became a recurring theme throughout the focus groups.

When renewable energy was discussed, lower cost was again seen as the biggest benefit to consumers. There was an awareness that consumers' bills paid for more than the energy that produced electricity (fixed costs, infrastructure costs, distribution costs), but consumers still expected their bill to come down.

Whilst they expected to save on the cost of energy after the transition to renewables, consumers also recognised the environmental benefits and most said that these benefits were important to them. They also foresaw the possibility of high quality jobs being created in the renewables industry and expected that the energy supply would become more environmentally sustainable.

## Changes that Consumers Expect to see in the Next 10 Years

The most frequently mentioned change that will be seen in the next 10 years is an increase in the number of electric vehicles on Northern Ireland's roads. Most consumers also said that an increase in the number of wind farms was likely and that coal fires would become a thing of the past. It was emphasised again by consumers that price is a major factor to them changing their energy behaviours and buying patterns.

## Barriers and Enablers to Energy Transition

### Cost

The cost to the consumer was seen by far as the biggest barrier to energy transition. Consumers anticipated that running costs of home heating and electricity would be lower after energy transition, but expected that start up or installation costs would be high.

## **Not relevant at this point in time**

For some consumers, switching to greener energy wasn't an option at this time. For some it didn't match their needs because of the kind of home that they lived in, whilst others said that it is hard to see lower carbon energy as a priority when they lived on a low income. Many consumers said that they would not consider any changes in line with lower carbon at this time because their systems or vehicles had considerable life left in them, and greener solutions would only be contemplated when it came time to change these.

## **Perceived corruption**

The perceived corruption surrounding the Renewable Heat Incentive initiative (RHI) in Northern Ireland is still on consumers' minds. A considerable minority of consumers said they did not distinguish between the controversy surrounding renewable heating schemes and the costs/benefits of the technology itself. The technology itself appears to be tarnished by the fallout from the RHI initiative.

## **Enablers**

Incentives to change to electric vehicles or financial help to install lower carbon systems were seen as the most effective enablers. Consumers said that there needed to be much more education on the costs and benefits of making lower carbon choices. Building trust between government, energy suppliers and consumers was seen as a priority, given the fallout from the RHI controversy.

## **Community energy schemes**

Awareness of community energy schemes was low. Consumers had reservations about joining such a scheme, partly because they saw it as introducing a dependence on others in their community and partly because they were wary of future change. Again, cost saving would be the major motivator for consumers to join community energy schemes.

## **Low Carbon Power Generation**

### **Benefits**

Lower running costs was seen as the most important benefit of low carbon power generation. Energy security and resilience of the energy supply were also seen as important to consumers. There was an alternative view that lower carbon generation might be less reliable than traditional means of generation.

### **Decommissioning of coal fired generation**

The decommissioning of coal fired generation was seen by consumers as an inevitable step in the journey towards carbon neutrality. Some expressed concern that jobs would be lost, whilst others expected that more high-quality jobs in renewables would be created.

### **Moving to a utility supplier that has a greater focus on renewable resources**

Most focus group participants said that cost would be the major factor in moving to a different energy supplier. Greener credentials were seen by most as a secondary consideration to cost. Security of supply was raised again in the context of moving to a more renewables-based supplier, with consumers doubting that the supply would be constant from wind power unless and until significant battery storage is put in place.

## Energy Efficiency

### Efficient technology

Most consumers had at least some LED lightbulbs in their homes, but only a small number had any other forms of energy efficient technology. Knowledge of smart meters was low, though the majority would be willing to install one if there was no installation cost and ongoing savings could be made.

### Perceived benefits of energy efficient technologies

The cost savings of energy efficient technologies and longer service life were seen as being the most important benefits of energy efficient technology.

### Willingness to change lifestyle

There was little enthusiasm for changing lifestyle to support energy efficiency except if it saved money. Consumers were willing to contemplate small changes only. Again, cost is the biggest factor.

### Energy efficient choices

The majority of consumers support making energy efficient choices when renewing items. The biggest benefit is seen as cost saving in the long run. Energy efficiency is however, only one buying criteria, with affordability, design and warranty also important to consumers.

## Low Carbon Heating

### Cost, environment and timing of change

Low carbon forms of heating were attractive to most consumers in terms of lower running costs and playing a part in protecting the environment. Most consumers would not contemplate a change to their heating system until their current one had reached the end of its life or they were moving to a new build home.

### Grants and incentives

Most consumers would be looking for grants or other incentives to help with installation costs. However, some remain suspicious of such schemes since the RHI controversy.

### Obstacles to installing low carbon heating

Cost is the biggest obstacle to installing low carbon heating along with the disruption during installation. Some consumers said they were wary of new technologies and would need very strong guarantees and warranties. Consumers also had concerns that installers may not be fully conversant with new systems and some proposed that a trusted source, such as The Consumer Council, could create a list of qualified installers.

## Transport

### Public Transport

Some consumers said public transport was convenient and stress free. Most however, especially those living in rural areas, said that public transport services did not suit their needs. A better public transport network would be welcomed and used by consumers, but current ticket prices were said to be too high.

### Availability of electric vehicle charging points

Most consumers had concerns about the number of charging points for electric vehicles. Some consumers were fearful that, even if they could find a charging point, it might be out of service or someone might interfere with it when the car is charging. Consumers also worried about running out of power where it is planned to do a round trip back to home without wishing to charge along the way.

### Costs of electric vehicles and other barriers

The overwhelming view from consumers is that electric vehicles are too costly. Consumers were also aware that downward price shifts can take place as technology ages. There were also concerns that now is not the time to buy. Other concerns that consumers had about electric vehicles included reliability, changing technology and hidden charges.

### The Needs of Specific Groups

Consumers thought that people with disabilities needed more help with heating costs. Some said that people with disabilities needed public transport to be more user friendly and needed reliable electricity supply to power medical equipment.

Most consumers thought that people in fuel poverty needed extra help. Landlords should be encouraged to invest more in energy efficiency.

Consumers who live in rural areas need better connectivity from public transport and help with sourcing alternatives to oil for home heating.

### Overall Comments from Consumers

Consumers in the focus groups said that being part of the discussion helped to inform them and focus them on the issues related to energy transition. There was a strong opinion that more education and awareness raising was needed to help consumers engage more fully with the issues.

Consumers also need help and advice to navigate through grant systems. With there being a residual mistrust of grants and incentives following the RHI controversy, consumers would welcome independent advice from trusted sources.

There was a high level of support for The Consumer Council playing a role in being a trustworthy source of information and for protecting consumers through advocacy and rights protection.

## Recommendations

- i. Agencies leading on energy transition should provide clear messages to the public that energy transition is inescapable and that there are agreed targets that have to be met. This messaging needs to convince the public that everyone will feel the effects of this change and everyone has a role to play in it.
- ii. Trade-in or scrappage schemes should be considered for household items and appliances that have poor energy efficiency ratings. Such schemes would help to overcome inertia amongst consumers and encourage them to make energy efficient changes sooner without waiting until the end of an appliance's life.
- iii. Consideration should be given to setting up a one-stop-shop, either virtual or traditional, which consumers could visit to get independent advice and information on low-carbon choices. This one-stop-shop should provide factual information and showcase the real experiences of other consumers who have already made low carbon choices.
- iv. Consumers need to be made more aware of how energy is produced and the cost elements involved in each stage of the process. Greater public awareness of these costs is necessary otherwise consumers will develop unrealistic expectations about how much they will save when energy production moves further towards renewables.
- v. Financial support schemes should be made available to consumers to help with the initial costs of installing or converting home systems to low carbon, high efficiency technologies. This support could be made by way of capital grant, low-interest loan, schemes to spread the costs over a period of time and schemes to underwrite maintenance and breakdown costs.
- vi. Community led initiatives offer a means of reducing costs, especially initial installation costs. Easily accessible information should be made available showing how community schemes can be set up and how individual consumers can be protected if they become scheme members.
- vii. There is a need for a register of properly vetted and certified installers and maintenance companies. The operation of such a register needs to become the responsibility of a trusted consumer advice organisation.
- viii. Consideration should be given to a guarantee scheme whereby consumers would be covered for the cost of rectifying faulty equipment or improper installation in the event of the supplier or installer having ceased trading.
- ix. There should be a programme of information and confidence building with consumers regarding electric vehicles.
- x. Consumers need information so that they can distinguish the benefits of fully electric vehicles from petrol, diesel, and self-charging and plug-in hybrids.
- xi. Charging sites need to be continuously mapped and the mapping made easily available to consumers.
- xii. Independent information on electric vehicles and their mileage range in real life driving needs to become readily available from trusted consumer advice sources.
- xiii. Consideration should be given to more community transport schemes that are low cost to the consumer, and which run on routes and at times that make them viable alternatives to using a car.

## 1 Background

### 1.1 Context and Key Drivers

The Consumer Council is a non-departmental public body (NDPB) established through the General Consumer Council (Northern Ireland) Order 1984. Its principal statutory duty is to promote and safeguard the interests of consumers in Northern Ireland. It has specific statutory duties in relation to energy, postal services, transport, and water and sewerage. These include considering consumer complaints and enquiries, carrying out research and educating and informing consumers.

To support its delivery, policy teams undertake research activities which provide insight into consumer issues in Northern Ireland. This insight informs future planning and strategic decision making.

One of the statutory functions of The Consumer Council is to “Carry out, or assist in the carrying out of, inquiries and research into matters relating to consumer affairs”. Specifically, The Consumer Council has a particular regard to those with a disability or chronic illness; of pensionable age; with low incomes; or who reside in rural areas.

Energy is a devolved matter in Northern Ireland and falls under the responsibility of the Department for the Economy (DfE). The Strategic Energy Framework 2010-2020 sets out Northern Ireland energy policy until the end of 2020. On 17 December 2019 DfE published a Call for Evidence to inform the development of a new Energy Strategy for Northern Ireland post 2020<sup>1</sup>. The new strategy will set out policies and targets that help deliver the “net zero” emissions targets included in the UK Government’s Road to Zero Strategy<sup>2</sup>.

The Consumer Council is actively involved with DfE, the Utility Regulator (UR) and the energy industry to help inform the new energy strategy post 2020 and the roadmap to deliver zero carbon targets. This energy transition presents considerable challenges for the energy industry and significant risks for Northern Ireland consumers. Therefore, it is important that The Consumer Council has robust evidence to continue to safeguard and represent the interests of energy consumers effectively.

This study supports the work of The Consumer Council and explores the attitudes, preferences and barriers of Northern Ireland domestic consumers in respect of the energy transition. This research will provide The Consumer Council with greater and more robust consumer evidence that can help inform policy development and practical interventions necessary to deliver the transition to a net zero carbon society.

Findings from this research study represent Northern Ireland consumer opinion. The Consumer Council will use this evidence to inform its engagement with DfE, UR and the energy industry during the development of the new draft Energy Strategy. It is anticipated that The Consumer Council will also use this evidence as part of its response to the consultation that DfE is planning in March 2021 with options for the new Energy Strategy.

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<sup>1</sup> <https://www.economy-ni.gov.uk/energy-strategy-call-for-evidence>

<sup>2</sup> <https://www.gov.uk/government/publications/reducing-emissions-from-road-transport-road-to-zero-strategy>



## 1.2 Research Aim and Objectives

The research aim was:

*“To engage with a range of consumers to explore the attitudes, preferences and barriers of Northern Ireland domestic consumers in respect of the energy transition”*

The areas covered in the research included:

The energy transition in Northern Ireland;

- Renewable energy;
- Energy efficiency;
- Heat;
- Power; and
- Transport.

In delivering this project SMR worked collaboratively with The Consumer Council to develop the focus group topic guide (see Appendix 1). In total 88 consumers took part in 11 focus groups covering all 11 local council areas in Northern Ireland. The groups had representation from various consumer segments including: those living in private rented, social housing and privately owned homes; those on low incomes; consumers with disabilities; those of pensionable age; and those living in rural areas. As part of the project short videos with consumers were also produced. These videos focus on the issues addressed within the research and how consumers are engaging with the concept of energy transition.

## 2 Methodology

### 2.1 Focus Groups

Eleven focus groups were conducted, one in each of the 11 Council areas. The topic guide used in the focus groups was agreed with The Consumer Council and a PowerPoint presentation based on these questions was prepared (see Appendix 1). The focus groups were conducted by ZOOM during which the PowerPoint was screen shared with participants. The groups were conducted in December 2020 and January 2021. One participant from each focus group was selected to make a short video on energy transition.

### 2.2 Participants

Table 1 presents a profile of those recruited to the focus groups, with a single group conducted in each Council area. The focus group schedule of questions

		%	n=88
Sex	Male	48	42
	Female	52	46
Age	16-34	28	25
	35-59	45	40
	60+	26	23
Social Class	ABC1	51	45
	C2DE	49	43
Local Authority Area	Antrim and Newtownabbey Borough Council	9.1	8
	Ards and North Down	9.1	8
	Armagh City, Banbridge and Craigavon	9.1	8
	Belfast	9.1	8
	Causeway Coast and Glens	9.1	8
	Derry and Strabane	9.1	8
	Fermanagh and Omagh	9.1	8
	Lisburn and Castlereagh	9.1	8
	Mid and East Antrim	9.1	8
	Mid Ulster	9.1	8
Newry, Mourne and Down	9.1	8	

### 2.3 Analyses

All focus groups were digitally recorded. The main points from each were drawn together and content analysis was carried out to identify themes and issues.

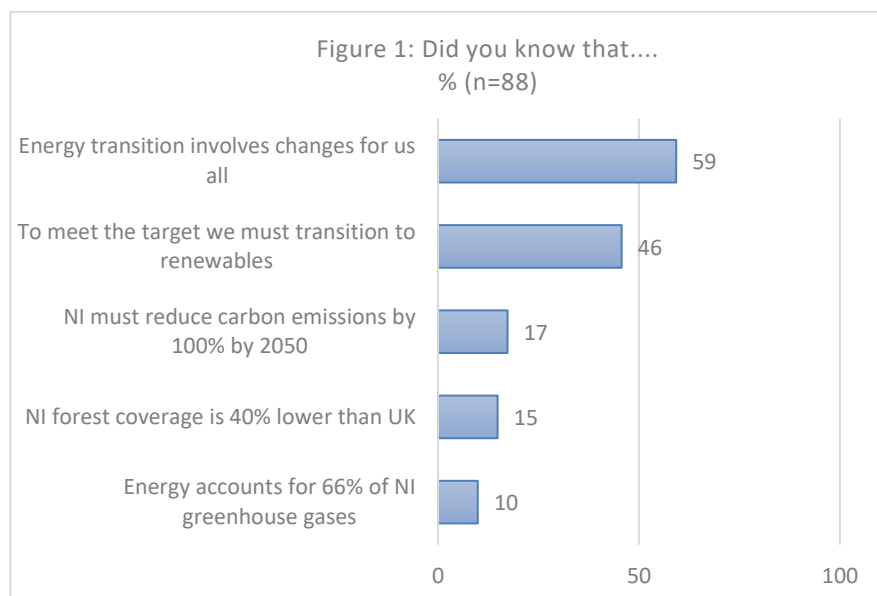
### 2.4 Note on Analysis and Figures

Note that 88 people participated in the focus groups. All 88 contributed to the discussions, but because of technical issues, some were unable to vote on the questions that are reported in the Figures. The total number able to vote was 81 and all percentages are calculated against this base.

### 3 Results

#### 3.1 Awareness of energy transition

Across the groups, knowledge of Northern Ireland’s greenhouse gas emissions, lower forest coverage and net emissions target were low (Figure 1). Knowledge of the wider goals and targets of energy transition were higher, with 46% aware that Northern Ireland must switch to renewables to meet its energy targets. Almost six out of ten (59%) were aware that energy transition involves changes for everybody.



#### 3.2 The most important benefits of renewable energy to consumers

##### Reduced cost to the consumer

The potential for reduced costs to the consumer was the benefit most cited by focus group participants.

- *“I’d expect to see a big reduction in our bills.”*
- *“Wind is a free and available resource and should be cheaper for the consumer.”*
- *“The (reduction in) cost, obviously, as it’s cheaper to generate electricity using wind and solar power.”*

Through wider discussion, participants began to realise that the cost of the oil, coal and gas that power traditional electricity generation was only one factor in what makes up the price to the consumer. Once they discussed other generation and transmission costs such as infrastructure, most realised that the savings to the consumer would be lower than they first thought.

##### Positive impact on the environment

The positive impact on the environment was of importance to most participants, being seen for the wider benefits that it brings and not just as a contributor to the emissions targets. For example, the health benefits of having cleaner air was raised frequently as a benefit, as was the contribution of carbon reduction on the sustainability of the planet.

- *“It will obviously be better for your health, emissions from fossil fuels are bad for your lungs.”*
- *“They should be more environmentally friendly for a start because they’re harnessing nature.”*

- *We have a lot of wind in this country, not so much sun.”*
- *“It is bound to be better for the environment and global warming.”*

### **Employment opportunities**

A number of participants raised the employment opportunities that greener energy might bring. Some thought that greener energy would be more localised in its production with small generation projects in local communities. This was seen as a potential supplier of local jobs. For others, the transition to lower carbon, and the technical innovation involved, was seen as potentially creating higher skilled jobs.

- *“I think there would be more local employment opportunities if there are more small-scale wind farms and the like.”*
- *“It’s a large industry and unlike fossil fuels it is an infinite resource so it has the potential to create a lot of good jobs.”*

### **A more sustainable energy supply**

The sustainability of the energy supply was seen by some as an important benefit. The continuous supply of, for example, wind energy was seen as protecting consumer supply and also as ensuring energy security by ending a reliance on imported fossil fuels.

- *“Sustainability is important and wind power is an infinite resource, so we shouldn’t run out of electricity that is made by it.”*
- *“Sustainability, it’s a never-ending resource so it provides energy security for the future.”*

## **3.3 Expected changes in energy production and consumption in the next 10 years**

### **More electric vehicles**

The most frequently mentioned change that will be seen in the next 10 years is an increase in the number of electric vehicles on Northern Ireland’s roads. It was unclear to consumers where the stimuli for this change would come from. Some mentioned that price reduction was needed to drive the change to electric vehicles, whilst others mentioned the need for a better charging infrastructure. The move to electric vehicles was, however, seen by most as inevitable.

- *“I think there will be a lot more electric vehicles on the road. They are just being phased in at the moment, but I think we’ll see the number increase hugely in the next 10 years.”*
- *“I don’t know what will drive what, I think if the cost of electric comes down it will encourage more people to adopt electric cars.”*
- *“I think the next 10 years will see the roll out of more electric cars. I am very sceptical about them at the moment because there are not many here yet and the logistics of charging them concerns me.”*

## More wind and solar farms

As with electric vehicles, most thought that an increase in the number of wind farms was inevitable and some also mentioned wave power. There was some ambivalence to wind farms. Whilst most see wind farms as the way forward in a lower carbon world and an increase in them as unavoidable, there were concerns about their visual impact on the environment.

- *“I think we will see more wind and solar power generators popping up here as methods of producing energy.”*
- *“I can see that there will be more wind farms causing more disruption to the natural beauty of the landscape.”*
- *“I was thinking as well that wave power could be harnessed a bit better possibly because we are surrounded by the coast...I know a lot of work has been done with Queens and other universities, but more could be done to harness that power.”*

## Coal fires will become a thing of the past

Most consumers expected that coal fires will become a thing of the past as households move towards less polluting ways of heating homes. This change, most said, would first be seen in new or refurbished properties.

- *“I think there will be a bit change in the types of heating that will be put into housing. I think coal fires will be a thing of the past.”*
- *“I think more people will integrate solar panels or heat pumps into the building of their houses and newbuilds.”*

## Saving energy and lowering costs

Some mentioned that they expected to be saving energy more in the next 10 years, both as a means of helping the environment and as a way of saving on costs. On costs more generally, there were numerous comments about price being a major factor in enabling consumers to move to renewables.

- *“There are savings to be made, turning things off will become the new norm.”*
- *“It will come down to cost, we all have families and bills to pay so if renewables are really to take off it has to be affordable for everybody.”*

## 3.4 Consumer views on the biggest barriers to energy transition

### Cost

The cost to the consumer was seen by far as the biggest barrier to energy transition. The cost to the country in terms of infrastructure renewal and funding grants was also mentioned frequently. It was argued that start-up costs need to be considered separately from ongoing and running costs. Whilst start-up and initial investment were thought to be high, most said that lower running costs would be a benefit for the consumer in the longer term.

The cost of changing appliances or cars was thought by some to be unacceptable unless the consumer was already about to change, or their current product had come to the end of its life. Changing cars or embracing renewables just to support carbon reduction was seen as a cost that consumers were unlikely to embrace in the short term.

- *“The costs to individuals of installing things like solar panels and the cost to the country generally for conversions and grants.”*

- *“We would need to know whether the costs outweigh the benefits in the long term.”*
- *“Cost, cost and cost. I am not going to upgrade my car to electric or buy a more energy efficient product until I need to change it which may not be for another five or 10 years. I am not going to change it just because it’s more environmentally friendly.”*
- *“I don’t think people make their choice to switch electricity suppliers based on their environmental credentials. They make their choice based on the cost so the success of energy transition will be based on affordability.”*

### **“Wouldn’t work for me”**

For some consumers, switching to greener energy wasn’t seen as an option, because it didn’t match their needs.

- *“Solar panels, heat pumps and wood burners only work in certain types of buildings. I have a large older house with a small garden and none of these technologies would work for me.”*
- *“It is hard to feel like you can be part of this transition when you are on a low income and renting your home.”*

### **Resistance to change**

As well as a general resistance to change, the attachment that consumers have to their current cars, heating or energy use was seen as a barrier to speedy change amongst consumers.

- *“People’s attitudes will be a barrier. A lot of people are stuck in their ways.”*
- *“I think people’s attitudes are probably the biggest barrier, in terms of the damage we are doing to the Ozone layer. If you were listening to Donald Trump or someone like that you could be fooled into thinking we don’t need to act. But if you look at what someone like David Attenborough is saying about the melting of the ice caps and the damage to the environment we do need to act.”*
- *“People’s attachment to cars and the transition to EVs. People won’t change cars immediately. It will take a while.”*

### **Perceived corruption**

The perceived corruption surrounding the Renewable Heat Incentive initiative (RHI) in Northern Ireland is still in consumers’ minds. The evidence from the focus groups is that the fallout from RHI has led to a lack of trust in government and agencies that promote renewables, especially renewable heating schemes.

- *“Perceived corruption of RHI and loss of confidence in authorities, that’s a big barrier.”*
- *“RHI was a total failure and has destroyed trust.”*
- *“The biggest barrier to transition for me is the corruption of our own politicians...with these schemes they have promoted just to line their own pockets and give jobs to the boys. How can you generate public confidence in these technologies after that latest debacle?”*

### 3.5 Enablers to energy transition

The enablers that consumers suggested often corresponded to the barriers that they perceived.

#### Bring down the costs/provide incentives

Again, cost was seen as the main issue that needed to be addressed. Consumers emphasised the difference between set-up costs and running costs and stressed that financial incentives had to provide payback within a reasonable length of time. If incentive or grant schemes were to be introduced, consumers suggested they would need to be easy to understand and hassle free to apply for.

- *“People need incentives to motivate them to have things like solar panels.”*
- *“Bring down the costs; if you were to install solar panels it would take you too many years to recoup the cost.”*
- *“You have to make change hassle free, easy and beneficial to people.”*
- *“If you bring in grants to encourage this transition then you need to make it easy to apply. If the application process is too difficult you just won't get the uptake.”*

#### Educate consumers

Education, awareness and greater understanding are all required to enable consumers to participate in energy transition. That could be through educating young consumers, who in turn educate parents, or through providing information that enables consumers to make informed choices.

- *“We need to build awareness and understanding, maybe increase education in schools about it.”*
- *“A lot more education is needed if we're all to move towards the transition.”*
- *“More information from actual users and testimonials of what has worked for ordinary people in energy choices.”*

#### Build trust

Building trust in new technologies was seen as vital if consumers are to engage fully with energy transition, particularly trust that the technologies are fit for purpose and work as they claim they do.

- *“You need to build trust that these technologies work and actually do save you money in the long run.”*
- *“People don't like change. Increase trust and encourage people to engage with change.”*
- *“I think leading by example might help. If we had local organisations and businesses making that work.”*

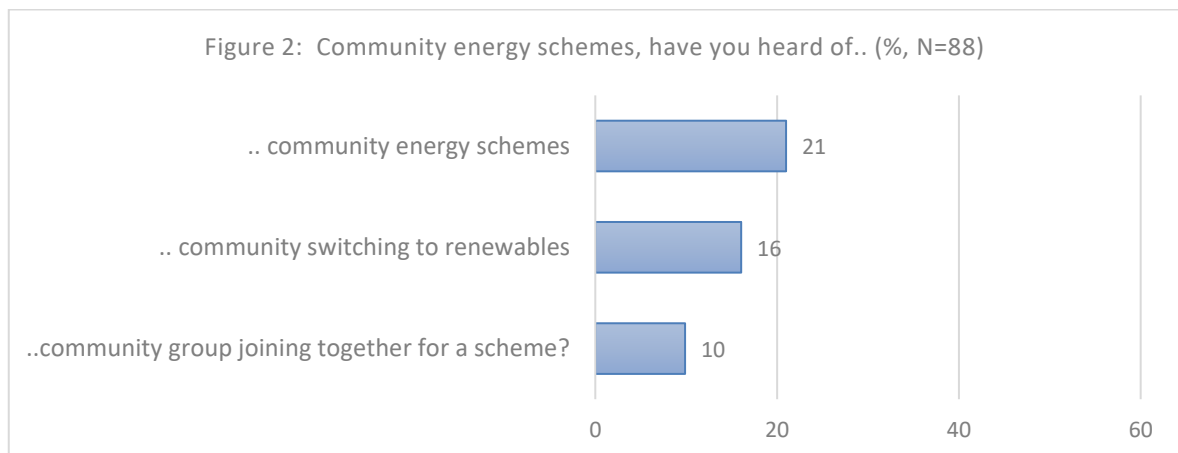
### 3.6 Interest in actively participating in energy transition

Nine out of 10 consumers said that they were interested in playing an active part in energy transition. Some looked forward to using new technologies and others just wanted a better environment for future generations.

- *“The development of electric and hydrogen and hybrid cars is something I would be interested in, but they need to reduce the cost to make them more affordable.”*
- *“It might not benefit me but it might benefit my future generations of kids you know.”*

### 3.7 Awareness of community energy schemes

Just 21% of consumers had heard of community energy schemes (Figure 2) and 16% had heard of a community switching together to renewables. Just one in 10 had heard of communities joining together in an energy scheme, but this was mostly groups coming together to order oil in bulk at a reduced rate.



### 3.8 Enabling consumers to participate in community energy schemes

#### Costs and fair pricing

Cost was the major factor in encouraging consumers to participate in community energy schemes. Based on the evidence from the discussions, consumers would need to be convinced that savings were real and that pricing according to usage would have to be demonstrably fair. Some consumers did stress the importance of the environment, but the majority said that cost trumps everything else.

- *“There has to be a cost benefit for people. If it was free people would be interested.”*
- *“Grants need to be made available for installation costs and ongoing costs need to be better.”*
- *“I think environment is more important (than cost). You want to have a future for your grandchildren. It’s not all about, you know, the old generation.”*

#### Factors that would discourage participation in community energy schemes

Uncertainty about the costs, both in the short and long term was cited as a discouraging factor, as was the potential for disagreements amongst members of the scheme.

- *“You need a long-term fixed price, you wouldn’t want to invest in something if you don’t know how much it will cost in the future.”*



- *“It would be very hard to get everyone in the community to agree.”*
- *“What would happen if people fell out?”*
- *“I would worry that you might get people who sign up to this in the community and then drop out leaving all the work to a few people.”*

### **3.9 Consumer willingness to participate in community energy schemes**

Just over half would be willing to join in a community energy scheme, but just one in five said they knew where they could get information on renewable energy schemes. The potential cost savings was the main motivator for most people who said that they might join a community scheme.

*“If it’s not going to be costing me anything and I feel like I will be doing my bit for the planet and it has been tried and tested and does help, then I would probably look into it and it would be something I would do.”*

### **3.10 Perceived benefits to consumers if Northern Ireland moves further towards low carbon power generation**

#### **Price/cost**

Again, price was most frequently mentioned by consumers as one of the biggest benefits of low carbon generation. That included the price that the consumer pays for their energy and the potential of selling energy back to the grid. There was a recognition that initial costs might be higher but running costs could be lower, or savings could be made in the long run.

- *“I would expect to see reduced costs in the long run.”*
- *“I would hope for a reduction in my bills.”*
- *“If you sell back to the grid, you can save a lot of money.”*
- *“Initial costs would be higher but maybe would get better as it went along.”*

#### **Energy security**

The security and resilience of the energy supply were seen as important benefits to some consumers. Independence in energy production and keeping the future supply stable were also mentioned.

- *“We would be more self-reliant as we would not need to be importing Russian gas or coal.”*
- *“We would have more energy security, more national resilience.”*
- *“It would help to ensure the stability of future supply.”*
- *“We need energy independence.”*

### 3.11 Support for the decommissioning of coal fired generation

Eight out of 10 consumers supported the decommissioning of coal fired generation.

- *“Obviously if there’s enough wind power to reduce electricity to support all of NI then you don’t need coal fired generation. We are lucky in that we have a lot of wind in Northern Ireland.”*

### 3.12 Moving to a utility supplier that has a greater focus on renewable resources

#### Price/cost

Most focus group participants said that cost would be the major factor in moving to a different energy supplier. A supplier with lower carbon credentials would only be attractive if prices were at least equal to their current tariff and preferably lower.

- *“I suppose if ....cost was all the same you probably would go into the ethics of renewable energy, environment and all those sort of impacts, but ultimately everybody goes for the cheapest cost, I think anyway that’s your main driver.”*
- *“It’s more important to put food on the table and pay the bills so it would have to be a lower cost.”*
- *“It would come down to price comparison. If it was the same price I would do it.”*
- *“Affordability outweighs all. The environmental benefits might be more important than cost but are we willing to put our hands in our pocket? I don’t think we are.”*

There was a minority view that looking after the planet was sufficient reason for moving to a lower carbon energy supplier, but even amongst this group, cost was still a factor.

- *“It’s a balance between cost and doing your bit for the planet.”*
- *“If it’s only a few pounds more, then I’d be happy to change.”*
- *“Cost is important, but you’ve got to do your bit for the environment.”*

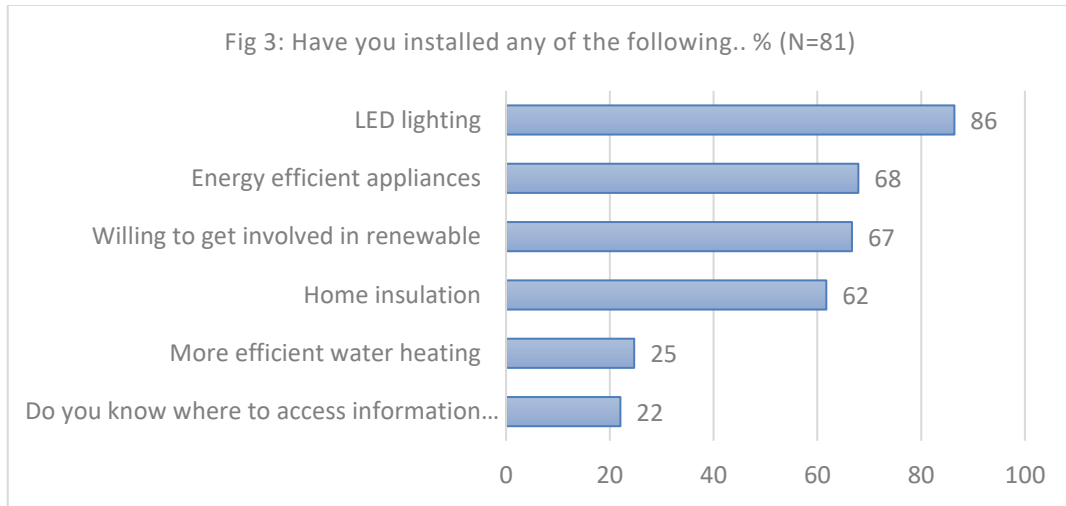
#### Security of supply

Whilst some consumers had earlier emphasised security of supply as a benefit, others had concerns about the security and consistency of supply. Some had concerns that renewable sources fluctuate in their availability and that could affect supply at certain times.

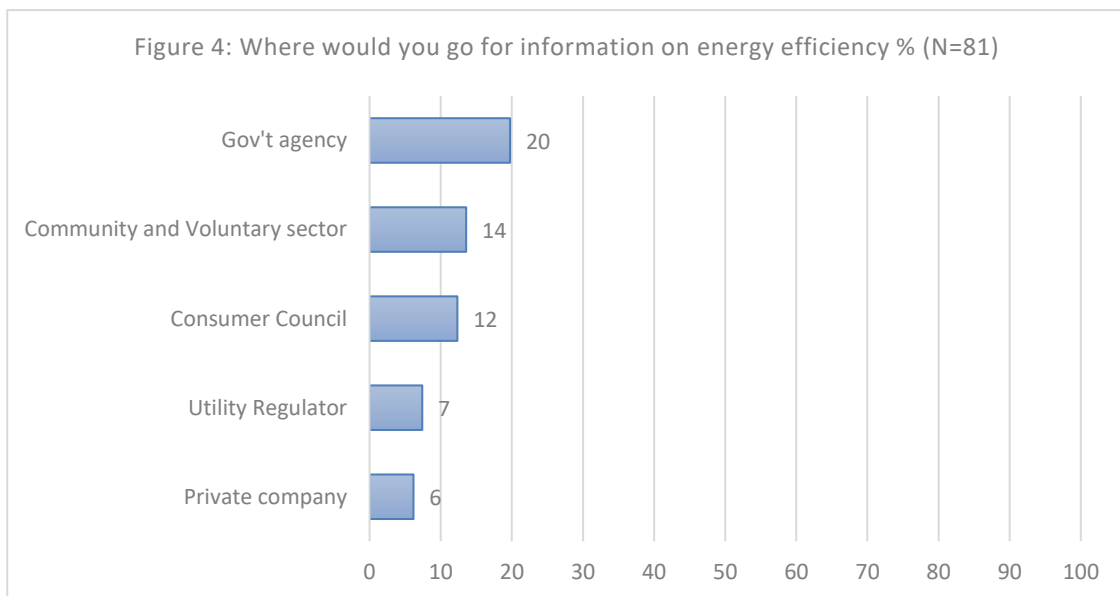
- *“I’d be a bit worried about the reliability of supply, if it came from a source like wind that might not always be available.”*
- *“I’d have questions about power fluctuation during the day. You wouldn’t want to take the risk especially if you were running a business.”*

### 3.13 Energy efficient technology

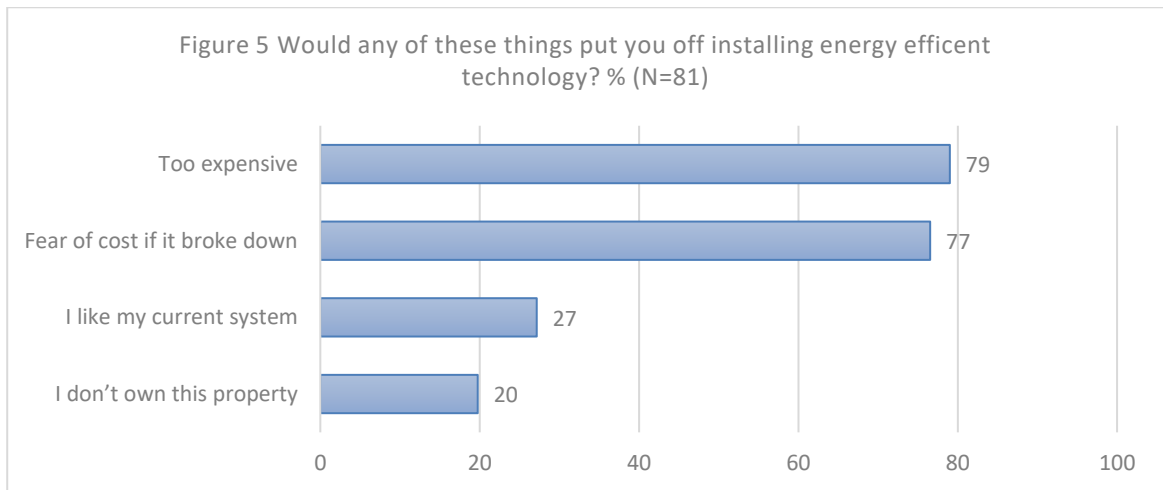
Figure 3 shows that the most common form of energy efficient technology in people's homes is LED lighting, with 86% of consumers saying that they had installed LEDs. Consumers also looked for energy efficient appliances when it was time to change and 68% had done so in the recent past.



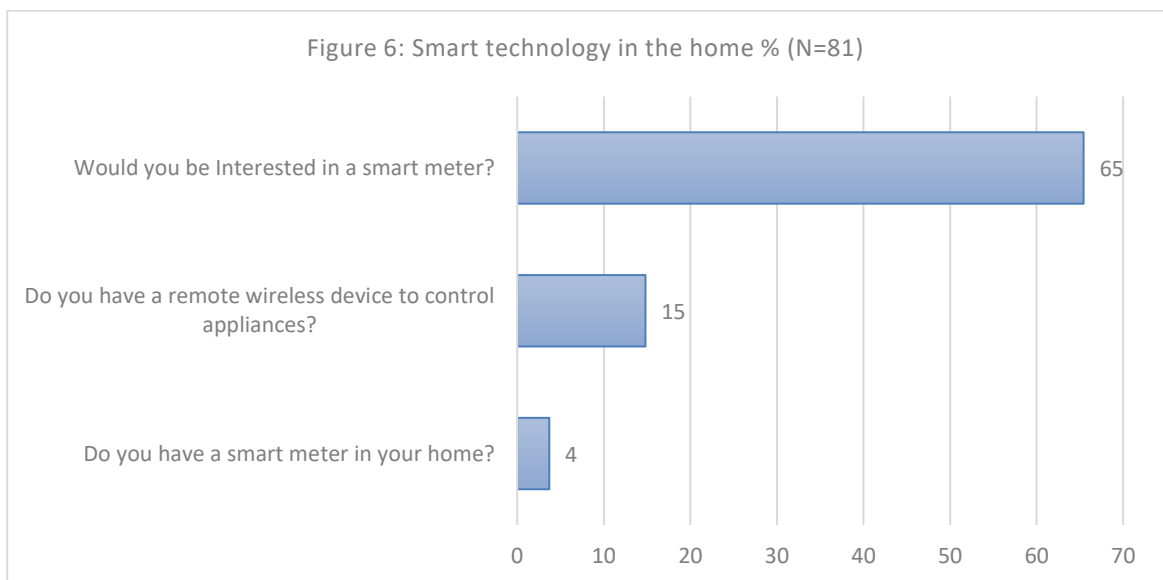
There was general uncertainty amongst consumers as to where they would go for information on energy efficiency. When asked unprompted, the majority said that they would "Google it." When presented with the list shown in Figure 4, the most favoured source of information was a government agency. Most said that they would probably arrive at government websites after a Google search.



The major factor in installing energy efficient technology is cost (Figure 5). For some, the cost of installing anything other than LED bulbs is too high. Others had fears that the technology might not be reliable and might break down, resulting in high repair or replacement charges.



Just 4% of consumers said that they had a smart meter in their home (Figure 6). 15% had a wireless device that controlled appliances remotely, in most cases this was heating control. Approximately two out of three (65%) consumers said they would be interested in a smart meter, with a lower level of interest recorded for remote wireless devices to control appliances (15% in addition to the 15% who already have one).



### 3.14 Perceived benefits of energy efficient technologies

#### Cost savings

Most consumers saw the cost savings of energy efficient technologies as being the most important benefit. Longer service life was also a factor in terms of the savings to be made from not having to renew items too soon.

- *“They use less electricity and cut down on energy consumption and are cheaper to run.”*
- *“If I needed an upgrade it would make sense to buy an energy efficient appliance because I would use less energy and save money in the long run, but I wouldn't just buy one for the sake of the*

*efficiency if I already had a useable machine."*

- *"They are more environmentally friendly, but it really just comes down to saving money to be honest."*
- *"LEDs are initially more expensive but last longer and cost less in the long run."*

### **3.15 Overall discussion on energy efficiency**

#### **Willingness to change lifestyle for greater energy efficiency**

There was little enthusiasm for changing lifestyle to support energy efficiency except if it saved money. Consumers were willing to contemplate small changes only, and again, cost is a factor.

- *"I would be happy to turn the heating down a wee bit."*
- *"I would ensure that things are turned off and not on standby."*
- *"There's probably loads of little things that you could tidy up around the edges of your lifestyle; you know switching off your devices at night, timing things and you know to be more efficient."*

#### **Making more energy efficient choices when purchasing items or renewing contracts**

Energy efficiency was important to consumers, mostly because of the potential savings on running costs. Consumers also listed the other factors that came into their buying decisions that were just as important as energy efficiency.

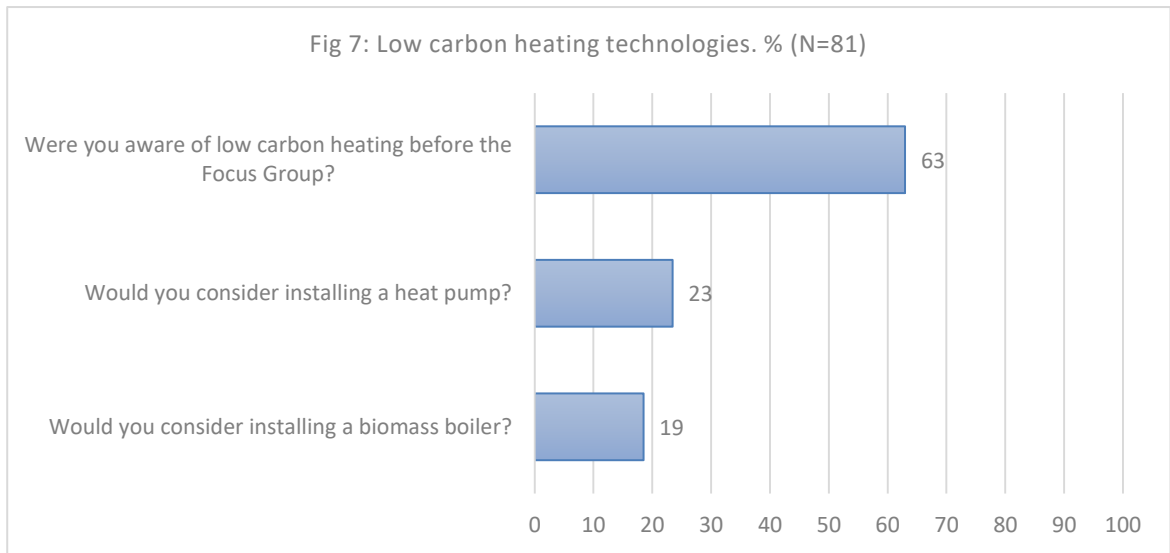
- *"If energy efficient machines were as affordable as less efficient machines then I would buy one."*
- *"Design is important, as well as being energy efficient."*
- *"Warranty is important, too, not just energy efficiency, I need to be sure I wasn't wasting money."*
- *"In terms of contracts, I would need to see a cost saving to make me move. I need a financial incentive to make me less complacent."*

Focus group respondents commented that they did not always have sufficient information to make informed choices on energy efficiency. The main factors discouraging energy efficient choices were costs, the "hassle factor" involved in changing, and concerns about reliability and maintenance.

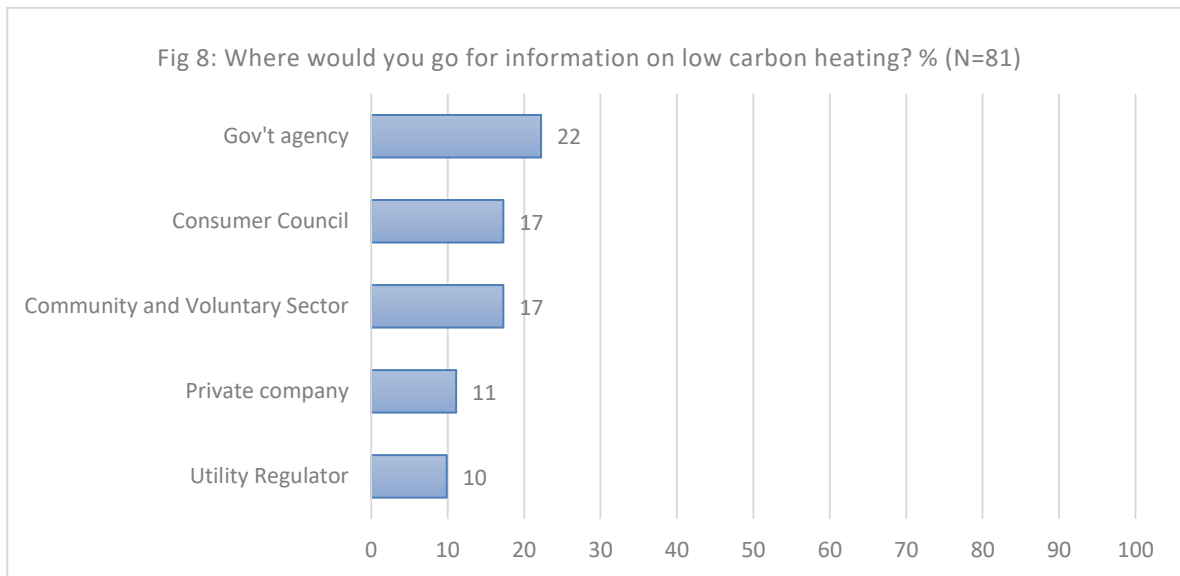
- *"We need more knowledge to help me make better choices. People just don't have enough information to make informed choices."*
- *"The cost would put a lot of people off and how you would have to adapt your house and how it would affect your living conditions."*
- *"There is all the hassle of change especially to put in a new heating system or major work."*
- *"I would worry if there is someone who could maintain and repair any new system."*

### 3.16 Low Carbon Heating

Approximately six out of 10 (63%) consumers had heard of low carbon heating technologies (Figure 7). Of those who had heard of them, most knew about biomass boilers and very few knew about heat pumps. Knowledge of biomass boilers was mostly because of the RHI controversy. Whilst 23% said that they would consider installing a heat pump, the cost of installation might put them off. Fewer (19%) said they would consider a biomass boiler.



Most in the groups said that they would do an Internet search for information on low carbon heating. When presented with the list shown in Figure 8, the most favoured source of information was a government agency.



### Benefits of low carbon heating

All but a few consumers in the focus groups said that they would not change their heating system at the moment and would only consider a low carbon heating solution if it was the time to change anyway, for example, if their current system was at the end of its life, or if they were moving to a new build.

- *“No matter what the benefits are, I wouldn’t think about changing unless something went wrong with my current system.”*

## Cost and environmental concerns

The cost of installation and the lower carbon emissions competed in consumers comments. There were concerns that the costs of installation could be higher than conventional systems. However, consumers could see the benefits of lower carbon systems. The main benefit was seen as lower running costs. The beneficial impact on the environment was seen as an equal factor to some, but as secondary factor to most.

- *“At the end of the day, it’s all about the costs. How much does it cost to install, how much can I save on running costs and how long does it take to recoup the investment? The environmental impact is secondary to all this.”*
- *“The capital cost of a heat pump is expensive at about 8k. I might consider it if the price came down in the next few years. I have underfloor heating which would be ideal for a heat pump system.”*
- *“For me, environmental concerns would take second place to cost in all cases.”*

## Grants and incentives for low carbon heating

With the predominant view that installation and other upfront costs were higher with low carbon heating, most consumers would look for grants or incentives to help with the installation or conversion.

- *“I would want a financial incentive. I would expect a grant for that.”*
- *“The government needs to make it easier for people to install these systems and money is the way to do that.”*
- *“If there was a grant to help with the capital cost, I would think about it then.”*
- *“Mine would need to be packing up and then I’d look at the options but I wouldn’t replace something for the sake of it because of carbon levels.”*

## Obstacles to installing low carbon heating

As with the above, cost was perceived to be the biggest obstacle to installing low carbon heating. The other concerns that would put consumers off low carbon heating were the reliability and the disruption during installation. Consumers were also concerned that the installers might not be fully conversant with the technology and may not fit the system correctly. A number also expressed distrust in such systems, and in biomass boilers in particular, because of the recent controversy surrounding the RHI grant scheme. The point raised earlier about renewing things only at the end of their life was raised again here about low carbon heating.

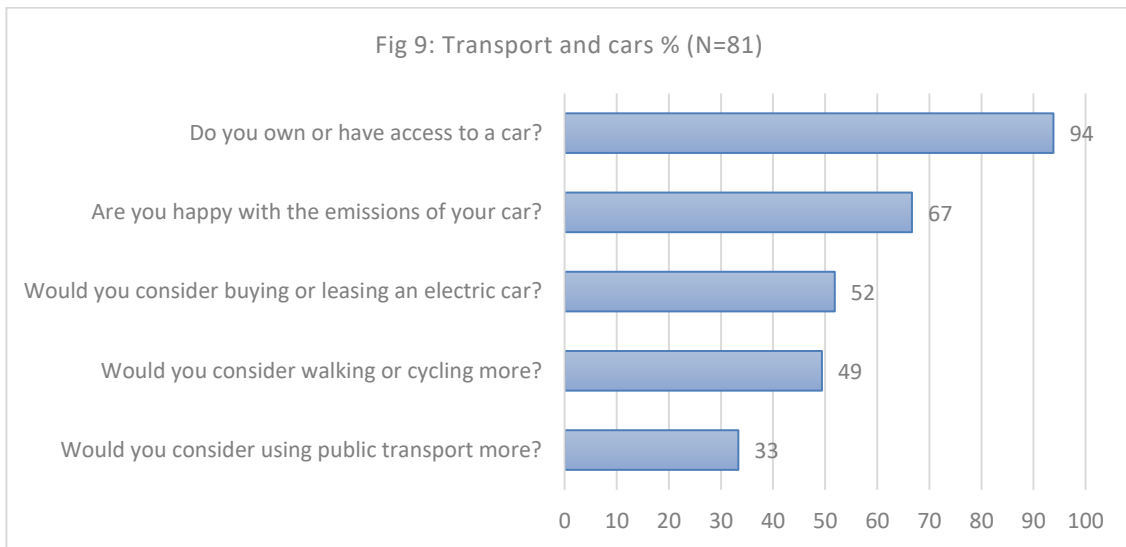
- *“It’s brand new technology and I’m not sure how reliable it is.”*
- *“You would need bulletproof warranty and support with a new system like that.”*
- *My current system would need to be packing up and then I’d look at the options, but I wouldn’t replace something for the sake of it because of carbon levels.”*
- *“Bad installers would be a negative for me. It’s a burgeoning industry and some know what they’re doing and others don’t.”*
- *“I don’t think I could put up with the disruption and mess of installing it, my system is almost new*

anyway.”

- *“The RHI scandal puts me off. I wouldn’t trust a system like that.”*
- *“That whole waste of money on the RHI. I would be concerned that these schemes are just a way of people lining their pockets.”*

### 3.17 Transport

One third of consumers would consider using public transport more if they thought it would reduce carbon emissions and just under half would walk or cycle more (Figure 9). More than two thirds of those who owned a car were happy with its emissions and just over a half would consider buying an electric car.



### 3.18 Factors encouraging and discouraging changes to the way you use transport

#### Public Transport

Whilst some consumers pointed to the convenience of public transport in terms of stress free travelling and no parking charges at the destination, most commented that public transport would not serve their needs.

- *“It’s stress free using public transport but it’s too expensive.”*
- *“Public transport here is very expensive in comparison to other European countries so I use the car. If public transport was less expensive it would be used more and emissions would be reduced, as would congestion on the roads.”*
- *“A better network of public transport would encourage me to use it. There are no parking charges if you use public transport.”*
- *“I live in a very rural area. If there was a community public transport project, then I would use it.”*
- *“We’ve never had a system up and running that would have the frequency to meet modern life, you’ll never have a bus coming past the door every five minutes whereas you can jump in your car as and when you need.”*



## Availability of electric vehicle charging points

The majority of comments and discussion points on transport were about electric vehicles. Most consumers had concerns about the number of charging points for electric vehicles, though some anticipated that the charging infrastructure would improve rapidly in the next few years.

- *"I'd be worried about finding a charging point if I needed it. I would worry about being stranded. That alone would put me completely off having an electric car."*
- *"What if you couldn't find the nearest charging point? You are never far away from a petrol station, but we need much more information on where charging points are situated."*
- *"I think in the next few years that the number of charging points will improve and the charging technology also."*

## Other issues with charging points

Some consumers were fearful that even if they could find a charging point, it might be out of service or someone might interfere with it when the car is charging.

- *"From what I see, the EV charging points are often broken."*
- *"I'd be worried that someone would disconnect the charger and I wouldn't be able to get home."*
- *"Friends of mine drove to Dublin and planned to charge the car at a particular point. The charging point was broken and they ended up spending the night in Dublin."*

## Range on a full charge

A similar doubt was expressed in relation to range. This was different from the worries about charging points, and the range anxiety was about running out of power where it is planned to do a round trip back to home without wishing to charge along the way.

- *"An electric car needs to be able to do a longish journey without having to recharge it. I would be frightened about not being able to complete the journey with an electric vehicle."*
- *"I'm not impressed with EVs and their capacity at the moment. Range is still a big issue with the current technology and the cars that offer longer ranges are usually top of the range and very expensive."*
- *"To me, as a family car it's more for range. I mean we would go on holiday to France and you couldn't do that in an electric car."*

## Costs of electric vehicles

The overwhelming view from consumers is that electric vehicles are too costly and not within the range of most consumers. Consumers were also aware that downward price shifts can take place as technology ages and have some concerns that this is not the time to buy. Prices, they think, will come down in a few years' time.

- *"Cost is a big barrier to buying an electric vehicle, they are just not accessible for most of the public at the moment."*

- *“For the mileage that I do I just want something basic and cheap. I usually buy secondhand and I’d be worried about buying a second-hand EV even if it was cheap.”*
- *“You see TV and other electronic prices come down all the time. If you were to buy an EV now they could be cheaper in a few years’ time, I would wait and see what happens to prices.”*

### Other barriers to owning or leasing an electric vehicle?

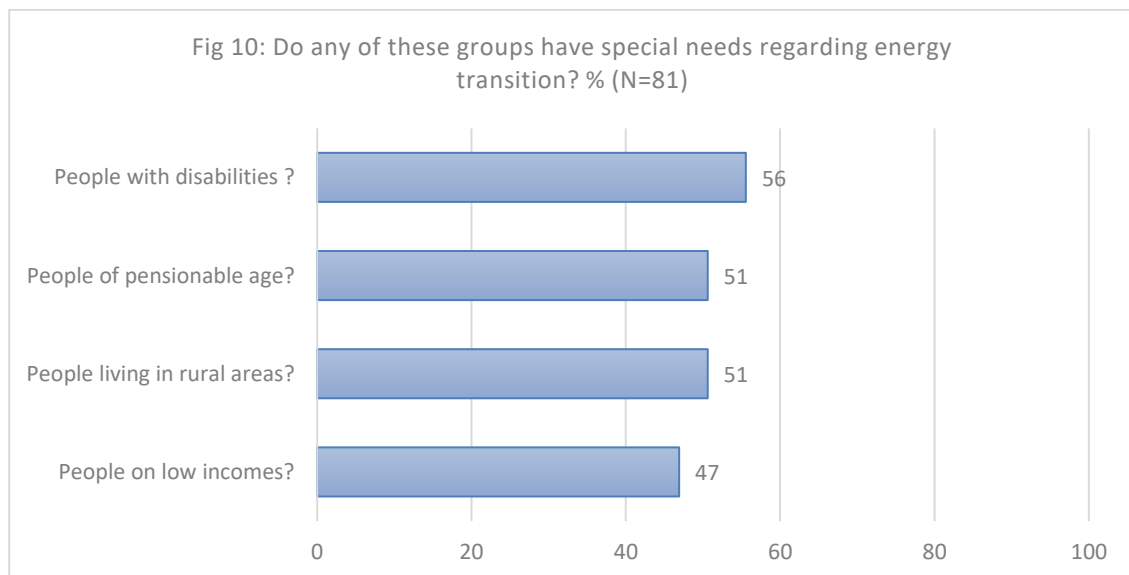
Other concerns that consumers had about electric vehicles included reliability, changing technology and hidden charges.

- *“Batteries could be a problem if they wear out quickly or if it is expensive to replace them.”*
- *“I’m not sure the current generation of EVs would suit me, I’ll wait for the next gen. You wouldn’t want to find out in a year or so that you had bought old technology.”*
- *“I’m a taxi driver and there are no EV cars out there yet that could do the job that I’m asking of my car.”*
- *“You might have to pay for charging at points in the future and that has to be added in.”*

### 3.19 The needs of specific groups

Consumers were asked if they thought specific groups in Northern Ireland had specific needs regarding energy transition.

People with disabilities were perceived to have special needs regarding energy transition by 56% of consumers (Figure 10). Just over half thought that people of pensionable age and people living in rural areas had special needs, and just under half thought that people on low incomes had special needs.



## **Consumers with Disabilities**

The main needs of consumers with disabilities were identified as:

- Additional help needed with heating costs as their bills are generally higher.
- Public transport needs to be more user friendly and with easier access.
- Disabled consumers might be more reliant on electricity because they need it for medical equipment, or to refrigerate medicine.

*“My brother is a double amputee and it’s really difficult for him to access public transport.”*

*“The elderly need energy efficient homes as they need more heat. They also need to use a lot of energy especially if there are special needs using a lot of equipment and they should get more financial help.”*

## **Consumers on Low Incomes**

The main needs of consumers on low incomes were said to be:

- Additional support to install energy efficient technology and smart meters.
- Landlords need to be encouraged to work with tenants and invest in lower carbon systems in their properties.
- No one should go cold, no one should be in fuel poverty.

*“Unfortunately, people on low incomes normally rent and it’s up to the landlord to invest in the properties, so the tenant isn’t able to do much themselves.”*

*“Fuel poverty is a fact where people have to choose maybe going without heat or food. All the information in the world and the schemes and incentives probably wouldn’t make any difference to you because you’re not in the position to change.”*

## **Consumers of Pensionable Age**

The main needs of consumers of pensionable age were said to be:

- People of that age who don’t drive themselves need good public transport.
- People of that age need more heat and need it for longer during the day than those who may be out of the house for long periods.
- People of pensionable age may need more information, guidance, and support to help them through energy transition.

*“My mum is 88 and she has the heating on all the time. She should get more help from government with bills.”*

*“In terms of using transport, it has to be much more accessible for people of pensionable age because they’re not as mobile as those who can maybe walk or drive or cycle to get a bus or whatever. I mean it’s only buses around here.”*

## Living in Rural Areas

The main needs of consumers who live in rural areas were identified as:

- Public transport has very poor connectivity in getting from one place to another and you have to use the car.
- The only heating choice available is oil or the inconvenience of bottled gas.
- If you live in a rural area there's usually space and enough land for a biomass boiler.

*"Buses to school aren't provided when they live within a two mile radius or live in remote locations, and so they have to drive the child to school themselves. There's no way round it they cannot walk."*

*"Unless a community group gets together and does something for ourselves then that's the only way we get anything done in a rural community."*

### 3.20 Concluding Discussion

#### What consumers learned from the focus group

Most consumers said that they had learned something from their participation in the focus group. Others said that it had focused their minds on the issues and they would think more about low carbon in the future.

- *"I've learned that I need to learn. I need to educate myself on all this stuff."*
- *"I've learned that we all need to change and to be open to that change."*
- *"I was surprised that wind provides so much of our electricity and I'm encouraged by that."*
- *"It was great to hear the views of people who have already made changes and learn from their experiences."*

#### What do you need to help you through energy transition?

More education about low carbon energy and a higher level of awareness were the biggest things that consumers said they needed to help them through energy transition. Consumers also said that they needed help navigating through grant systems and independent views on the technology that they are expected to embrace.

- *"We all need more information on how to navigate grant applications and there should also be support for landlords."*
- *"We need more education especially for kids but also for adults. The kids can help to influence their parents, so maybe that's where you start."*
- *"We need to be able to build trust in new technologies and for that we need independent reviews and advice. We also need a trusted installer scheme, a proper one, validated by government or the council."*
- *"For me the biggest thing is I need to have confidence in the system and that the biggest benefit is not going into someone else's pocket."*

## Who needs to act?

Most consumers thought that the impetus should come from government and local authorities. Some reiterated their distrust in authorities emanating from the RHI controversy.

- *“Politicians need to act, but then again, I have very little trust in our politicians.”*
- *“I think local councils need to act because the schemes at the minute are run by local councils and if they are going to introduce more it will be local run rather than by government.”*
- *“The lead needs to be taken by an independent body, one that has no interest in profiting from it.”*

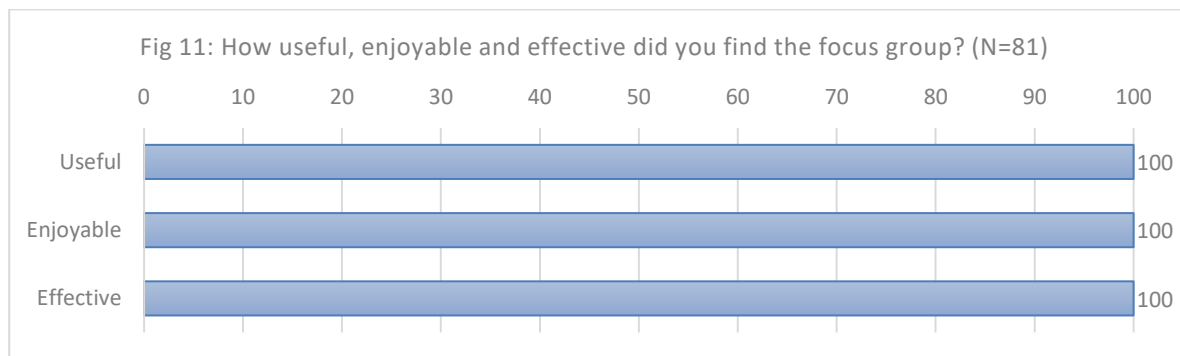
## What role should The Consumer Council play?

Not everyone had heard of The Consumer Council. Among those who did and those who had the role of The Consumer Council explained during the focus group, there was high support for it taking a lead role in advocacy and consumer protection. Many of the expressions of support carried the rider of The Consumer Council being able to demonstrate its independence.

- *“To disseminate independent information, they would be seen as trustworthy.”*
- *“They could be that independent body advocating fair competition and fair pricing. But who funds them, how independent are they really?”*

### 3.21 Feedback on the focus groups

All consumers across all the focus groups (100%) said that they had found the groups a useful way of giving their views (Figure 11). All (100%) found the groups enjoyable and all (100%) said that the focus groups were an effective way of engaging with them to get their views.



## 4 Discussion

The level of awareness about energy transition was low. Whilst consumers were aware of the general debate around emissions, there was a low level of understanding about how every individual will be expected to play a role in reaching agreed emission targets. Whilst there were some who were personally committed to what they could do to lower carbon emissions, most people saw it as something to which they only paid attention when they needed to. For these people, lowering their carbon footprint was not a priority.

It is clear that the level of engagement needs to be higher and consumers need to be helped to make the connection between their everyday choices/behaviours and the impact that these have on the transition to low carbon. We would recommend, therefore, that:

- *Agencies leading on energy transition should provide clear messages to the public that energy transition is inescapable and that there are agreed targets that have to be met. The messaging needs to convince the public that everyone will feel the effects of this change and everyone has a role to play in it.*

Most consumers did not feel it was imperative for them to take immediate steps towards greater energy efficiency. For many, such changes are only considered if and when an appliance or system has reached the end of its serviceable life. Only at this point, for example when choosing new white goods or replacing a heating boiler at the end of its life, do most consumers think about energy efficiency. This inertia will inevitably lead to a slower transition to more energy efficient technologies or systems, and consumers may need some encouragement to think about making changes sooner rather than later. We recommend that:

- *Trade-in or scrappage schemes should be considered for household items and appliances that have poor energy efficiency ratings. Such schemes would help to overcome inertia amongst consumers and encourage them to make energy efficient changes sooner, without waiting until the end of an appliance's life.*

In order to enable consumers to make appropriate choices, information needs to be accessible and emanate from a trusted source. The RHI controversy has left a residue of suspicion amongst consumers about government advice and government subsidy. Whilst most consumers want to see subsidies in the future, they are likely to be suspicious about government advocating particular systems or technologies. A one-stop-shop source of independent advice is needed to showcase the available low carbon choices. This must be perceived to be independent of the Northern Ireland Executive. According to our research, one of the most trusted sources of information is the shared experience of other consumers and a one-stop-shop should harness the power of this. We recommend therefore that:

- *Consideration should be given to setting up a one-stop-shop, either virtual or traditional, which consumers could visit to get independent advice and information on low-carbon choices. This one-stop-shop could provide factual information and showcase the real experiences of other consumers who have already made low carbon choices.*

Consumer expectations are high regarding the savings they expect to see from low carbon and renewable energy production. These expectations are predicated upon the belief that wind, sunlight and wave power are free. Whilst consumers do understand that energy charges must include both the generation cost and the cost of transmission to the home, there is still a lack of knowledge and some suspicion as to how these costs are made up. We recommend therefore that:

- *Consumers need to be made more aware of how energy is produced and the cost elements involved in each stage of the process. Greater public awareness of these costs is necessary otherwise consumers will develop unrealistic expectations about how much they will save when energy production moves further towards renewables.*

Whilst consumers believe that the costs of consuming energy will fall as we move to renewables, they distinguish between initial capital costs and the running costs. They expect running costs to be lower, but accept that the capital cost of installation will be higher. They also have fears that new technologies might have higher ongoing costs for maintenance and repair. There is an expectation amongst consumers that they will get financial help with the elements that would otherwise cost them more. Subsidies and grants would be required to help consumers. We recommend therefore, that:

- *Financial support schemes should be made available to consumers to help with the initial costs of installing or converting home systems to low carbon, high efficiency technologies. This support could be made by way of capital grant, low-interest loan schemes to spread the costs over a period of time, and schemes to underwrite maintenance and breakdown costs.*

Knowledge about community schemes such as community heating or community energy generation was very low. Consumers had little idea of how they could go about setting up such schemes. They also had concerns about how equitable the charges would be to members who use different amounts of heating or electricity, and were worried that schemes might be taken over by dominant individuals in their communities. With community schemes offering the potential for cost savings with regard to installation and running costs, it would be helpful to have more information available to consumers on how to set up community schemes and the safeguards that can be put in place for consumer protection.

- *Community led initiatives offer a means of reducing costs, especially initial installation costs. Easily accessible information should be made available showing how community schemes can be set up and how individual consumers can be protected if they become members of such a scheme.*

Consumers are concerned that there is insufficient expertise in Northern Ireland in the installation and maintenance of low carbon heating systems. They worry that they may encounter poorly trained or inexperienced fitting services, and that installation companies may not be able to provide ongoing trouble shooting or the rectification of improperly installed systems. We recommend that:

- *There is a need for a register of properly vetted and certified installers and maintenance companies. The operation of such a register needs to become the responsibility of a trusted consumer advice organisation.*
- *Consideration should be given to a guarantee scheme whereby consumers would be covered for the cost of rectifying faulty equipment or improper installation in the event of the supplier or installer having ceased trading.*

Most consumers think that electric cars are too expensive to buy and do not have a large enough range. Most see a new electric car as a luxury item and consumers who buy their cars second-hand do not have electric vehicles on their radar at all at the moment. The targets for stopping the sale of petrol and diesel vehicles cause anxiety for many of these consumers who fear that government will begin to apply charges, taxes and sanctions to non-electric vehicles, putting their personal and travel-to-work transport at risk.

Actions to change transport behaviours need to be targeted at helping consumers to overcome their reluctance in making the change to electric. Such efforts may be best focussed on improving the availability of electric charging points, helping with local community transport issues, providing support for the purchase of vehicles and underwriting losses should today's technology become difficult to resell in a few years. In terms of what can be done to help consumers, we recommend that:

- *There should be a programme of information and confidence building with consumers regarding electric vehicles.*

- *Consumers need information so that they can distinguish the benefits of fully electric vehicles from petrol, diesel, and self-charging and plug-in hybrids.*
- *Charging sites need to be continuously mapped and the mapping made easily available to consumers.*
- *Independent information on vehicles and their range in real life driving needs to become readily available from trusted consumer advice sources.*
- *Consideration should be given to more community transport schemes that are low cost to the consumer and which run on routes and at times that make them viable alternatives to using a car.*



## Appendix 1 (Focus Group Topic Guide)



- Why we are doing this research
- Your contribution
- What we will talk about
- Focus group guidelines
- Request to record
- Confidential and not attributable • GDPR
- What happens to your feedback



- Do you know what renewable energy is?
- Do you know what the benefits of renewable energy are?



- What are the most important benefits of renewable energy to you?

Did you know:



- Energy accounts for 66% of greenhouse gas emissions in NI
- Forest coverage (carbon sink) is 40% lower in NI
- NI must reduce emissions by 100% by 2050
- Energy Transition towards 2050 involves changes to how we use energy
- To meet the 2050 target we must transition to renewables
- Northern Ireland will be transitioning to lower carbon energy production and consumption and has emissions targets to meet.

Discussion

- What benefits would you expect to see from Northern Ireland transitioning to lower carbon energy production and consumption?
- What changes do you think there will be in energy production and consumption in the next 10 years?

Discussion

- What do you see as the biggest barriers to energy transition?
- What can be done to enable people to engage with energy transition?

Are you interested in participating in Energy Transition?



- INTERESTED
- NOT INTERESTED

Are you aware of:



- Wind power
- Solar power
- Heat pump technology
- Battery storage for renewables

Are you aware of:



- Renewable energy projects in your community
- The ways that communities and individuals can take part in community led renewable energy projects

Discussion

- What would enable people to participate in community schemes?
- What would discourage people participating in community schemes?
- Would you get involved?
- Would you make changes to your lifestyle?

Discussion

- What changes to lifestyle would you be willing to make?
- Do you know where to access information on what communities can do in relation to renewable energy?
- What would encourage you to move to a utility supplier that has a focus on renewable resources?

What would discourage you from moving to a supplier that has a focus on renewable sources?



- Too expensive  
Fear of cost if things go wrong \$I like the system I currently have
- I don't own my own home  
Other

Discussion

- What do you see as the biggest barriers to energy transition?
- What can be done to enable people to engage with energy transition?

Power generation

- Did you know that 48% of NI power generation comes from renewables, mostly from wind?
- What benefits are there to consumers if Northern Ireland moves further towards low carbon power generation?

Smart meters: Information

- Smart meters can tell you how much energy you are using
- They communicate usage directly with your energy supplier
- You get accurate bills
- No need for home visits to read meter
- You get real time information on energy use
- Smart meters will bring an end to estimated billing

Would you



- Use a Smart Meter in your home?
- Support decommissioning of coal fired generation?
- Change energy suppliers to one that supports renewables?

Discussion:

- What would encourage/discourage you to change energy suppliers?

Energy efficient schemes and technologies



Are you aware of energy efficiency schemes and technology?

- Do you have any energy efficiency technology in your home?
- Do you know the benefits of energy efficiency technologies?
- Do you know where to get information on energy efficiency technologies?

Discussion

- What are the most important benefits to you of energy efficient technologies?
- If you have accessed information on energy efficient technologies, how easy was it to get it?

Where would/do you get Information on energy efficiency schemes and technologies?



- A government agency
- The Consumer Council
- Community/voluntary organisation
- The utility regulator OFGEM
- A private company that supplies technology

Would you be willing to install energy efficient technology in your home?



- Solar panels
- Wind turbines
- Electric battery storage
- Wood pellet burner

Discussion

- Would you be willing to change your lifestyle to achieve greater energy efficiency? (How)
- What would encourage you to make more energy efficient choices?
- What would enable you to make the right choices about energy efficiency?
- What would discourage you from adopting energy efficiency measures?

Have you heard of community energy schemes?



- Community-owned renewable electricity installations such as solar panels, wind turbines or hydroelectric
- Members of the community jointly switching to a renewable heat source such as a heat pump or biomass boiler.
- A community group supporting energy saving measures such as the installation of cavity wall or solid wall insulation.
- Working in partnership with the local Distribution Network Operator to pilot smart technologies.

Discussion

- Would you join in a community energy scheme?
- Would you be interested in controlling your home energy system remotely with a wireless device?

Low carbon heating technologies



**HEAT PUMPS** provide low carbon heating by transferring heat from outside to inside your home  
**BIOMASS BOILERS** provide heat from sustainably produced wood pellets



Low carbon heating technologies



- Were you aware of low carbon heating technologies before?
- Had you heard of heat pumps before?
- Had you heard of biomass boilers before?

Where would/do you get Information on low carbon heating?



- A government agency
- The Consumer Council
- Community/voluntary organisation
- The utility regulator OFGEM
- A private company that supplies technology

Discussion

- Do you know the benefits of low carbon heating?
- What benefits are most important to you?
- If you have accessed information on low carbon heating, how easy was it to get it?

Low Carbon heating



- Have you any low carbon heating technology in your home?
- Would you consider changing your current heating system to a low carbon technology?

- Have you heard of District Heating Schemes?

#### Specific groups



- Do people on low incomes have specific needs when it comes to energy, transport and heating? What are those needs?

#### Specific groups



- Do people of pensionable age have specific needs when it comes to energy, transport and heating? What are those needs?

#### Specific groups



- Do people in rural areas have specific needs when it comes to energy, transport and heating? What are those needs?

#### Final discussion

- Have you learned anything from the FG discussion?
- Overall, what are the top things that you need to help through energy transition?
- Who needs to act to give you the support that you need?
- What role should the Consumer Council play in Energy Transition?

#### Evaluation

- How useful did you find this group for giving your views?
- How enjoyable did you find this group?
- The Consumer Council is keen to engage with consumers. How effective do you feel this approach is to engage with you?

#### Discussion

- What would encourage you to install a low carbon technology in place of a conventional boiler?
- What would discourage you from installing a low carbon technology in place of a conventional boiler?

- What do you think of neighbourhood/district heating schemes?

#### Transport information

- Emissions from transport in N.I. 2016 were 29% higher than in 1990
- 70% of all journeys in NI are by car (61% in England)
- There were 66 million bus passenger journeys in NI (2015- 2016)
- Rail travel is growing in NI up 26% between 2014 and 2018

#### Transport in the near future



- Would you consider using public transport more?
- Would you consider walking or cycling rather than taking transport?
- Do you own or have access to a car?
- Are you happy with the emissions of your car?
- Would you consider buying or leasing an electric car?

#### Discussion

- What would encourage you to make any of these changes?
- What would discourage you from any of these changes?
- Would you be worried about EV charging points?
- Is cost a barrier to owning or leasing an electric vehicle?
- Are there other barriers to owning or leasing an electric vehicle?

#### Specific groups



- Do people with disabilities have specific needs when it comes to energy, transport and heating? What are those needs?



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