

Report Price: £1095.00 | \$1478.58 | €1232.31

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"Irish consumers are increasingly wanting to take a stronger hold of their energy management, with a high level of consumers wanting more information on their energy usage to help manage their bills, while a significant proportion of consumers noted interest in generating their own energy at home via renewable sources." – Brian O'Connor, Senior Consumer Analyst

This report looks at the following areas:

Irish consumers are showing increased levels of interest in greener energy sources – with greater attention in the media on climate change and pollution pushing consumers to question their own energy usage. Moving forward, energy suppliers that can effectively highlight their use of renewable energy sources are likely to strongly appeal.

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

арас +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £1095.00 | \$1478.58 | €1232.31

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Issues covered in this Report

Executive Summary

The market

Figure 1: Estimated total domestic customer numbers for electricity vs. gas suppliers, IoI, NI and RoI, 2013-18

Figure 2: Estimated total domestic electricity and gas usage, IoI, NI and RoI, 2013-18

Forecast

Figure 3: Indexed estimated total domestic customer numbers for electricity vs. gas suppliers, IoI, NI and RoI, 2013-23

Market factors

Consumers facing higher heating and electric prices

2020 renewable energy goals likely to be missed

Renewable energy increasingly important energy source in Ireland

Companies and innovations

The consumer

A third of Irish consumers use gas, but heating oil is dominant in NI

Figure 4: Methods used for home heating, NI and RoI, September 2018

Bord Gáis and SSE top gas providers

Figure 5: Current gas supplier used, NI and RoI, September 2018

Former national electricity suppliers remain key providers

Figure 6: Current electricity supplier used, NI, September 2018

Wood burners more used type of renewable energy source

Figure 7: Types of renewable sources of energy, NI and RoI, September 2018

Greater switching activity within the electricity sector than gas

Figure 8: If consumers have switched electricity provider in the last 12 months, NI and RoI, September 2018

Figure 9: If consumers have switched gas provider in the last 12 months, NI and RoI, September 2018

Two thirds want more information to help control usage

Figure 10: Agreement with statements relating to utilities, NI and RoI, September 2018

The Market – What You Need to Know

Electricity and gas customer numbers growing

Energy prices increase in 2018

RoI and UK falling short of renewable energy targets

Strong proliferation of renewable energy sources

Market Sizes and Forecast

Electricity customers growing

Figure 11: Estimated total domestic customer numbers for electricity suppliers, IoI, NI and RoI, 2013-23

BUY THIS REPORT NOW



Report Price: £1095.00 | \$1478.58 | €1232.31

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 12: Residential property sales, NI, 2005-17

Figure 13: Residential property transactions, volume, RoI, 2010-17

Electricity usage holds steady despite new customer levels

Figure 14: Estimated total domestic electricity usage, IoI, NI and RoI, 2013-23

Gas customers in NI see 29% increase 2013-17

Figure 15: Estimated total domestic customer numbers for gas suppliers, IoI, NI and RoI, 2013-23

Figure 16: Estimated total domestic customer numbers for gas suppliers, by location, NI, 2013-17

Gas usage set to increase from 2018-23

Figure 17: Estimated total domestic gas usage, IoI, NI and RoI, 2013-23

Market Drivers

Electricity and gas prices increase in 2018

Figure 18: Consumer price index for electricity and gas, RoI, January 2013 to October 2018

Figure 19: Consumer price index for gas vs. liquid fuels, RoI, January 2013 to October 2018

NI consumers face price increases too

Figure 20: Consumer price index for gas and electricity, NI, January 2013 to October 2018

Figure 21: Consumer price index for gas vs liquid fuels, NI, January 2013 to October 2018

RoI and UK failing to meet 2020 carbon target

UK/NI experiencing more success in emissions reduction, but likely to miss target

Renewable energy generation increasing year on year

Figure 22: Comparable renewables percentages for the UK, by country, 2006-16

Figure 23: Energy generated by renewable sources for primary energy supply, by million tonnes of oil equivalent (Mtoe), RoI, 2006-19

Declining consumer confidence in NI may see consumers hesitant to invest in at-home renewables

Figure 24: Amount that consumers currently have in savings and investments (excluding the value of your main home and any pension savings), NI and RoI, October 2017 Figure 25: How consumers expect their personal financial situation to change in the next 12 months, NI, April 2017-November 2018 Figure 26: How consumers expect their personal financial situation to change in the next 12 months, RoI, April 2017-November 2018

rigule 20. now consumers expect their personal milancial situation to change in the next 12 months, Kor, April 2017-November 2018

Companies and Brands – What You Need to Know

Ervia subsidiary Gas Network Ireland investing in a renewable fuel strategy

Firmus and Phoenix Natural Gas announce gas pipe construction

Renewables could become the focus of the Irish energy sector in the coming years

The most recently established utilities companies focusing on digital communications with customers

Who's Innovating?

Mandatory Public Service Obligation (PSO) Levy in RoI reduced

Sustainable Energy Authority of Ireland (SEAI) funding 45 projects across IoI

Potential of blockchain technology could be transformative for the utilities industry

Technology changing the way utilities companies interact with consumers

Which? warns that energy companies in the UK will be unable to meet the government target of a smart energy meter in every home by

2020

Companies and Brands

BUY THIS REPORT NOW



Report Price: £1095.00 | \$1478.58 | €1232.31

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Electricity-only providers

Budget Energy (NI only)

Figure 27: Budget Energy Ltd., bill pay tariffs, November 2018

Click Energy (NI only)

Figure 28: Click Energy, domestic bill pay tariffs, November 2018

Figure 29: Click Energy, keypad tariffs, November 2018

EirGrid

Pinergy (RoI only)

Figure 30: Pinergy, tariffs in home electricity market, RoI, November 2018

Gas-only providers

Firmus Energy (NI Only)

Figure 31: Firmus Energy, tariffs in residential energy market, NI, November 2018

Phoenix Natural Gas (NI Only)

Dual-fuel providers

Bord Gáis/Ervia (RoI only)

Figure 32: Bord Gáis, electricity-only tariffs, November 2018

Figure 33: Bord Gáis, standard gas tariff, November 2018

Figure 34: Bord Gáis, large residential gas price plan, November 2018

Electricity Supply Board

Panda Power (RoI only)

Figure 35: Panda Power, tariffs in the home electricity and gas market, RoI, November 2018

PrePayPower.ie (RoI only)

Figure 36: PrePayPower.ie, tariffs in home electricity market, RoI, 2018

Figure 37: PrePayPower.ie, tariffs in home gas market, RoI, November 2018

SSE Airtricity

Figure 38: Tariffs used in NI home electricity market, November 2018

Figure 39: Tariffs used in NI home gas market, November 2018

Figure 40: Tariffs used in RoI home energy markets, both electricity and gas, November 2018

Viridian (Power NI and Energia)

Figure 41: Energia, tariffs in residential electricity market, RoI, November 2018

Figure 42: Energia, tariffs in home gas market, RoI, November 2018

Figure 43: Energia, tariffs in residential dual-fuel market, RoI, November 2018

Figure 44: Power NI, tariffs in home electricity market, NI, November 2018

The Consumer – What You Need to Know

NI consumers stronger oil heating users

Bord Gáis and SSE top gas providers

Power NI and Electric Ireland key electricity suppliers

Fifth of Irish consumers use some type of at-home renewable energy

One in five has switched electric supplier in the last 12 months

BUY THIS REPORT NOW



Report Price: £1095.00 | \$1478.58 | €1232.31

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Consumers want more information to control energy usage

Heating Provisions

NI consumers almost twice as likely to use oil heating than gas

Figure 45: Methods used for home heating, NI and RoI, September 2018

Oil heating sees strongest use in areas where mains gas isn't readily available

Figure 46: Consumers who use oil heating in their home, RoI, September 2018

Figure 47: Consumers who use oil heating in their home, NI, September 2018

Gas usage highest among urban dwellers

Figure 48: Consumers who use gas heating in their home, RoI, September 2018

Figure 49: Consumers who use gas heating in their home, NI, September 2018

Gas Suppliers Used

Bord Gáis and SSE key gas providers in RoI and NI

Figure 50: Current gas supplier used, NI and RoI, September 2018

Bord Gáis benefits from heritage standing

Figure 51: Consumers who use Bord Gáis as a gas supplier, RoI, September 2018

SSE Airtricity largest gas supplier in NI

Figure 52: Consumers who use SSE Airtricity as a gas supplier, by gender and social class, RoI, September 2018

Electricity Supplier

Former national electric companies see most usage

Figure 53: Current electricity supplier used, NI, September 2018

Power NI shows higher usage among men

Figure 54: Consumers who use Power NI as their current electricity service, by gender, NI, September 2018

Almost half of RoI consumers subscribe to Electric Ireland

Figure 55: Consumers who use Electric Ireland as their current electricity service, by region, NI and RoI, September 2018

SSE's green credentials playing well in both NI and RoI

Usage of Renewable Energy Sources

Fifth of Irish consumers using renewable energy

Figure 56: Types of renewable sources of energy, NI and RoI, September 2018

Figure 57: Consumers that do not have any renewable energy sources on their property, by socio-economic group, NI and RoI, September 2018

Wood burners most used renewable

Figure 58: Consumers who have a wood burner on their property, by age, NI and RoI, September 2018

Utilities Supplier Switching Behaviour

Fifth of consumers have switched electric supplier in the last 12 months

Figure 59: If consumers have switched electricity provider in the last 12 months, NI and RoI, September 2018

Figure 60: Consumers have not switched electricity provider or tariff in the last 12 months, NI and RoI, September 2018

RoI consumers more likely to switch when it comes to gas

Figure 61: If consumers have switched gas provider in the last 12 months, NI and RoI, September 2018

BUY THIS REPORT NOW



Report Price: £1095.00 | \$1478.58 | €1232.31

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Attitudes towards Utilities

More information desired to help control energy spending

Figure 62: Agreement with statements relating to utilities, NI and RoI, September 2018

Affluent consumers want more tariff information and smart meters

Figure 63: Agreement with the statement 'More information on tariffs would help me control my energy spending better', by work status and social class, NI and RoI, September 2018 Figure 64: Agreement with the statement 'A smart meter would help to both manage energy consumption and lower energy bills', by socio-economic group, NI and RoI, September 2018

Major interest in generating energy at home

Figure 65: Agreement with the statement 'I would be interested in generating more of my energy at home (ie using solar panels)', by age group, NI and RoI, September 2018

RoI consumers more willing to switch to 100% renewable energy sources

Appendix – Data Sources, Abbreviations and Supporting Information

Data sources

Generational cohort definitions

Abbreviations

BUY THIS REPORT NOW