



Executive summary

Explain was commissioned to conduct independent qualitative research in order to understand awareness of SP Transmission and to gain an understanding into how SP Transmission can best communicate information to their consumers, with a particular focus on their finances.

The objectives of the research were:

- To understand awareness of SPT and their role and responsibilities
- To share key information with consumers, with a focus on financial information
- To understand how SP Transmission can best communicate information to consumers in future

A workshop format was selected in order to allow SP Transmission representatives to present information to attendees, and allow for discussion amongst tables. Table discussions were facilitated by independent moderators from Explain. Attendees were all living in the SP Transmission licence area and the workshop took place in a central Glasgow location.

Within the research, we engaged with SP Transmission consumers of a range of ages (18+) and spoke with individuals from a range of different socio-economic groupings. In addition, one table at the workshop was specifically recruited to represent 'future consumers'.

Key findings

The majority of respondents had heard of SP Energy Networks previously, although many referred to the organisation as an 'energy supplier'. When asked about SP Transmission specifically, awareness across consumers was generally low, with none of the future consumer respondents having heard of SP Transmission previously.

After being presented with some information about the roles and responsibilities of SP Energy Networks and SP Transmission, some respondents were confused about their differences to an electricity supplier. Some attendees also felt that this background information was unnecessary for a consumer to be aware of as it would not affect them directly.

The majority of attendees found the information provided throughout the presentation complex and did not find this to be easily digestible. Suggestions for improvements to the presentation itself included; providing better examples, simplifying explanations used, simplifying the language used and

exploring the use of imagery. Additionally, the term 'monopoly' caused some confusion within the workshop.

As the presentation moved onto exploring financial information relating to SP Transmission, including ownership, funding, bills and profit, the majority of respondents stated that they would not typically seek out this information themselves and felt that this wouldn't be relevant for consumers. Information that was considered to be in the interest of consumers was mainly surrounding the cost of their bill directly.

Overall, the videos presented were well received by respondents. Some were unsure of the overall aim of the SP Energy Networks video and felt that the dialogue spoken by the children was unrealistic. However, others found the use of children within the video to be powerful, particularly in highlighting concerns for the future generation. Respondents felt that the summary 'explainer' video at the end of the workshop could be simplified further but felt this was a good way of summarising key information.

Overall, attendees felt that the information provided during the workshop would be more relevant to shareholders and that SP Transmission should ensure to adapt the information when targeting domestic consumers and the general public. They felt that the information should be condensed and simplified, with different terms used to explain things in a more simplistic manner. Specific channels that were suggested to share the information via included:

- Social media channels such as Facebook, YouTube adverts, Instagram adverts, Snapchat adverts for the younger generation
- Face to face channels targeting coffee shops and community centres for the older generation
- Leaflet drops
- Infographics
- Email invites for customers to arrange a meeting

Recommendations

Based on the findings of the research, we recommend the following actions to best communicate information about SP Transmission to domestic consumers:

- Consider ways to raise awareness of SP Transmission alongside SP Energy Networks as awareness of SP Energy Networks was significantly higher
- Exclude information that would not directly impact consumers as they felt this was unnecessary
- Consider using different analogies to explain the role of SP Transmission within the electricity network
- Use simpler terminology throughout – particularly when talking about financial aspects and consider ways to simplify the term ‘monopoly’
- Use more ‘real life’ and relatable examples to explain information relating to SP Transmission’s finances, for example the way that finances work in sport and the workplace
- Consider making adaptations to the videos used to further simplify and streamline the information presented, for example redefining complex terms and simplifying the aspects relating to OFGEM and the regulatory environment
- Consider adapting the information to be shared when targeting different audiences, for example younger and older consumers
- Look to have this information accessible to customers, but don’t provide to all consumers upfront as many will not find this relevant
- Consider the following channels for information sharing and raising awareness:
 - Social media channels such as Facebook, YouTube adverts, Instagram adverts, Snapchat adverts for the younger generation
 - Face to face channels targeting coffee shops and community centres for the older generation
 - Leaflet drops
 - Infographics
 - Email invites for customers to arrange a meeting

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1.0 Introduction

This section of the report outlines the background and objectives of the research alongside the chosen methodology.



Background

SP Transmission is part of SP Energy Networks, and they are responsible for the transmission of electricity in central and southern Scotland. They take electricity generated from power stations, windfarms and various other utilities and transport it throughout their transmission network, consisting of over 4000 kilometres of overhead and 320 kilometres of underground lines. Furthermore, their systems are crucial to the delivery of the Government's renewable energy objectives.

Public awareness of who SP Transmission are and their role and responsibilities is typically low, despite their importance in the process of keeping electricity flow and ensuring electricity users can turn the lights on when they need to.

Explain was commissioned to conduct a workshop event in Glasgow to both present information to SP Transmission consumers, and to understand how SP Transmission can best communicate such information to consumers in future.

Objectives

The objectives of the research were:

- To understand awareness of SPT and their role and responsibilities
- To share key information with consumers, with a focus on financial information
- To understand how SP Transmission can best communicate information to consumers in future

Methodology

A qualitative approach was taken due to the exploratory nature of the research. The workshop format provided the opportunity for SP Energy Networks representatives to share information through presentations and videos, but also allowed for table discussions amongst attendees and interactive exercises moderated by Explain.

Attendees were recruited on-street by our team of Market Research Society (MRS) researchers. The on-street team recruited members of the public living in the Glasgow area, which is covered by SP Transmission. Those who were recruited were also of a range of ages and socio-economic status. Attendees were incentivised with £50 cash at the end of the workshop as a thank you for taking part, and to cover travel expenses.

The workshop was conducted by a chairperson from SP Energy Networks who presented information to the room regarding SP Transmission, their roles and responsibilities and detailed information about their finances. A full copy of this can be found in appendix 1.

At various points throughout the presentation, an experienced moderator on each table from Explain facilitated table discussions. One moderator was allocated to each table and used a pre-agreed discussion guide to gauge feedback on specific topics presented throughout the workshop.

All table discussions were audio recorded with the permission of all attendees and transcribed following completion of the workshop. These transcripts were then used as the basis for thematic analysis.

Notes on analysis

Workshop transcripts were used as the basis for thematic analysis. Findings have been analysed per section of information presented at the workshop (see appendix 1), in line with the discussion guide (see appendix 2).

2.0 Respondent profile

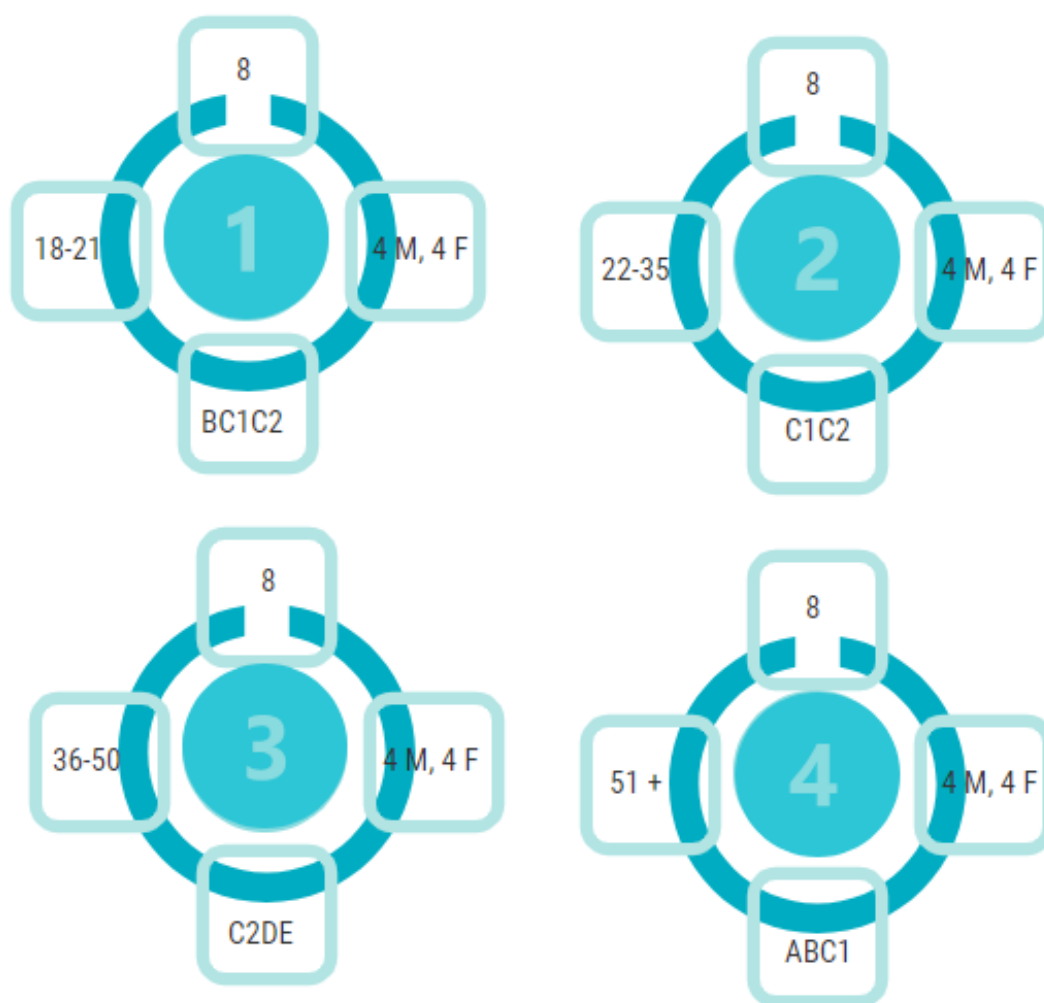
The profile of respondents who took part in the research can be found in this section.



Respondent profile

One workshop was conducted in central Glasgow, which is an SP Transmission licence area. The workshop consisted of four tables, with one independent moderator present on each table to facilitate discussion between presentations.

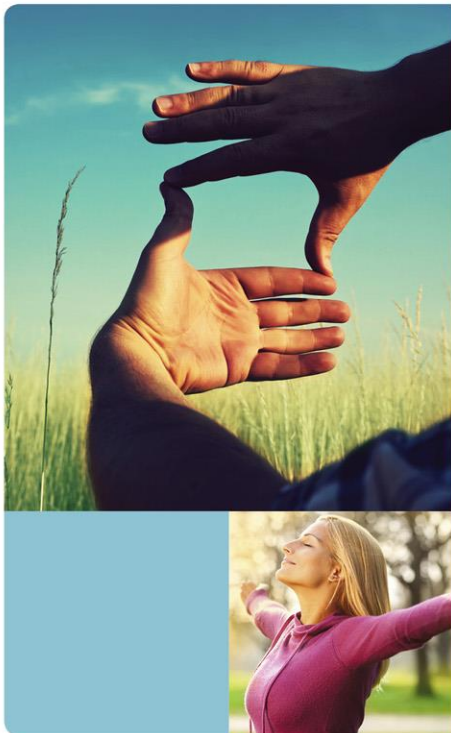
Attendees were a mix of ages, gender and socio-economic status. The overall mix of gender, age and SEG by table were as follows:



One table was specifically recruited to consist of SP Transmission 'future consumers'. These respondents were aged between 18-21 and were not responsible for the electricity bill within their household.

3.0 Results

The findings of the research can be found in this section.



Results

This section of the report details the insights gathered from the four tables during the workshop.

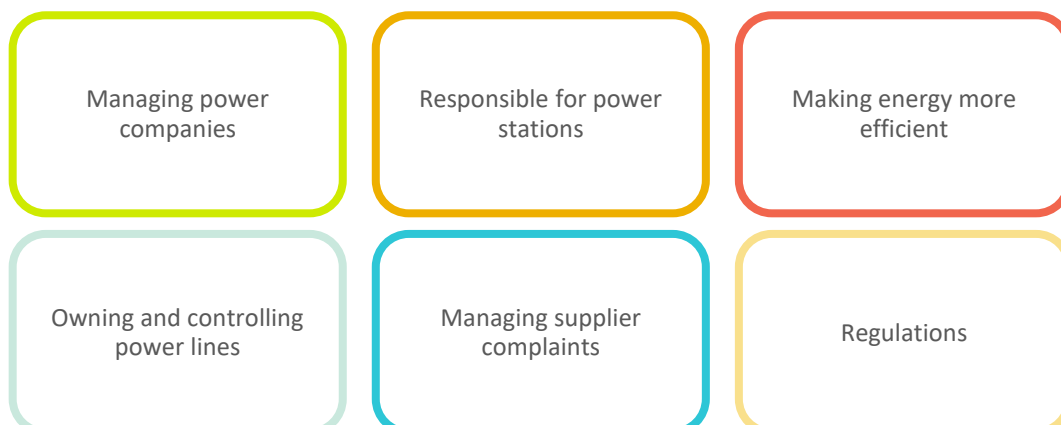
Initial awareness

To gauge initial awareness of SP Transmission, the workshop began with discussions amongst tables about awareness of SP Energy Networks generally and more specifically about awareness of SP Transmission.

The majority of respondents had heard of SP Energy Networks previously. When probed about what they thought SP Energy Networks did, many stated that they thought SP Energy Networks were an energy supplier:

- *"Just that they are a big energy supplier in Scotland"*
- *"I remember my sister had an issue with Scottish Power a few months back and she raised a complaint, and on the top of the letter it said SP Energy Networks so I assumed it was all linked to the energy company"*
- *"I'm just thinking about my own bills and how they work and obviously SP Energy Networks are a provider so it's just what I automatically thought of, energy"*

Other suggestions of what SP Energy Networks did were inclusive of the following:



Some respondents appeared to be more aware of what SP Energy Networks are responsible for, but this tended to be due to personal experience. For example, one respondent had experienced a power cut and had consequently visited the SP Energy Networks website. Another respondent had a friend that worked for SP Energy Networks:

- *"They get electricity to their medium. I've had a power cut before and I've typed in my postcode to their website and it's come up saying that it's not just your house, it's a few streets as well"*
- *"Substations. They deal with the electricity itself or they could do with SP Energy Networks and they obviously carry the electricity from power stations or whatever to source. I've got a mate that works for SP Energy Networks"*

Those who were aware of SP Energy Networks were subsequently asked if they had seen, heard or read anything and where this was. One respondent had seen SP Energy Networks advertised on a van, and another had seen advertisements on a train.

On the table of 'future consumers', a number of respondents said that they had seen information about SP Energy Networks on social media channels such as Facebook. When probed for further details, they stated that they had seen promotion-type content and linked this to supply of electricity.

- *"It was deals and stuff, I can't remember the specific promotion"*
- *"We did business with some of the top companies in Scotland who were prominent, SP Energy Networks were the biggest supplier for energy in Scotland. We were talking about things like supplying energy and being very competitive and things like other companies with better offers with electricity supplies"*

Comments were also made that although they had seen some communications about SP Energy Networks, it was the branding and logo that they were familiar with, as opposed to information about what they do:

- *"It's good branding as I know the logo but I don't necessarily know anything else"*
- *"It's just the logo stands out but I don't really know much about them. It's like the brand you know, the branding of it"*

Attendees were then asked about their awareness of SP Transmission specifically. None of the 'future consumers' had heard of SP Transmission previously, with awareness across all tables generally low.

When asked who SP Transmission were and what they might do, some respondents stated that they may be responsible for maintaining the grid:

- *“Just general maintenance, just to make sure the supplies are running through the grid properly”*
- *“Maintaining the lines and things”*

Other suggestions focussed around what the word ‘transmission’ may involve:

- *“I just think that it’s the signal. That’s what I think of when I think of transmission, a signal”*
- *“Transmissions just make me think of high wires going from the substation”*





Role and responsibilities

The SP Energy Networks representative then went through slides from a presentation which detailed who SP Transmission are, what they do and gave an initial overview of the RIIO – framework. During this time, attendees were invited to inform the room if there was any terminology that they were unsure of. One respondent asked for clarification on the term ‘monopoly’ when the role of Ofgem was discussed.




When explaining the role of SP Transmission, the SP Energy Networks representative also made reference to the similarities between electricity transmission and motorway infrastructure. The majority of attendees found this comparison helpful to aid their understanding of the system. One respondent found this analogy confusing and thought that SP Transmission were responsible for road infrastructure themselves:

- *“Part of the billing pays for the motorway, the lights and things? I was always under the impression that was when we paid our council tax and things. I didn’t realise that that came into electricity bill. I always thought that was to do with the council”*

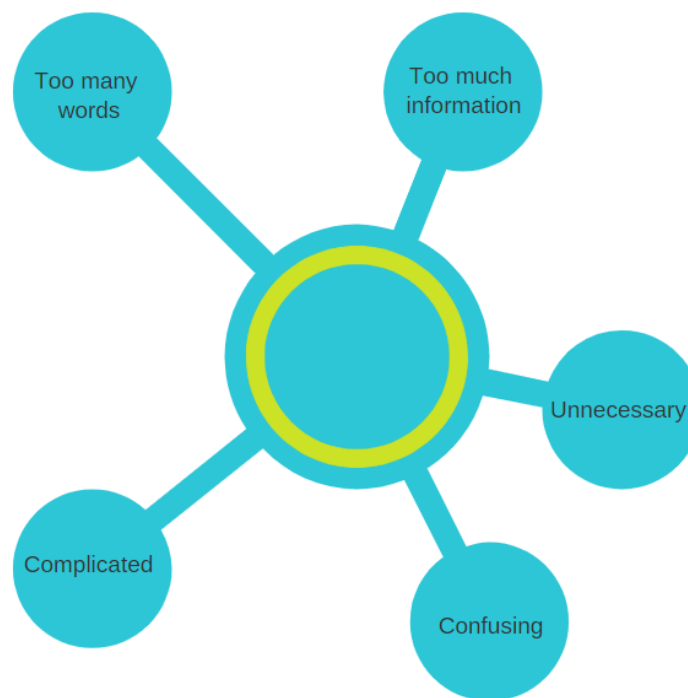
After this presentation, table discussions focussed around attendees’ thoughts and understanding of the information they had been told. The majority of respondents had initial questions over how the finances linked in with what the customer pays in their bill. There was also some confusion over the role of SP Energy Networks and SP Transmission in comparison to the supplier.

-  *You are talking about being SP Energy Networks being at the top, does that mean that me sitting at the bottom, paying out, I pay my provider, but he is actually getting a better deal from the people at the top?"*
-  *"I don't get how they get the monopoly. Why is there not more competition on their side of things"*
-  *"Are they like a provider company? A facility company?"*
-  *"So, if they've monopolised on the energy, then at the end of the day it doesn't matter who my provider is if I'm getting it from SP Energy Networks?"*

Some attendees also felt that the information presented during this section was unnecessary for consumers to know about as this would not impact them directly.

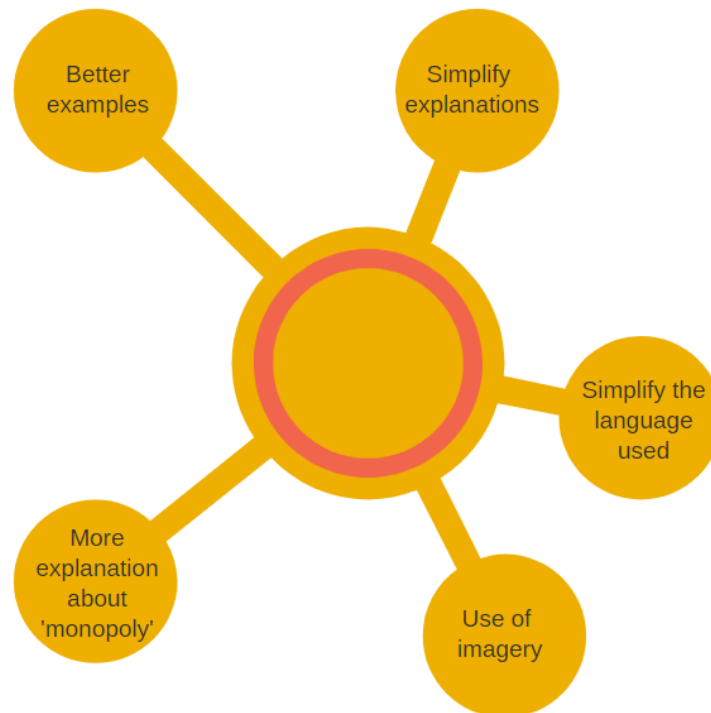
-  *"What I was struggling to understand is why do we need to know? What would the general public need to know about this?"*
-  *"It's so far removed, I don't understand"*
-  *"It doesn't affect you as a customer"*

In terms of understanding, the majority of attendees found the information provided in the presentation complex and didn't find the information to be easily digestible. Key themes included the following:



- *"I think his slides were too complicated"*
- *"There were too many words on his slides"*
- *"I was trying to take it in and listen, to concentrate on the words so maybe they were too full, too much information for what we're talking about"*
- *"I thought it was okay when he explained it further, but I think at the beginning it didn't really work"*

Suggestions on how to make the information more digestible for customers included:



- *"I don't know how you could explain it better. I know what he's saying but think trying to actually word it with a better example"*
- *"Just the terms, explaining it a bit more as people don't know what it was but obviously it gave a breakdown of the structure"*

During this section of the workshop, attendees were also shown a short two-minute video which detailed the key responsibilities of SP Energy Networks. The video also included information about future consumers which was narrated by young children and focussed on what SP Energy Networks must do to cater for the future generation.



Overall, the video was well received by attendees, however some respondents were unclear on the point of the video and what message it was aiming to portray:

- *"I think it looked like two separate videos, there was no message. Nothing joined in it, like the boy and the girl bit was good but it didn't go with the first bit. It was a bit like two separate videos completely"*
- *"I feel like there wasn't a point to it"*

There was a mixed response to the use of children to present the information. Some respondents felt that hearing this information from children emphasised the importance of things that may be challenging for the future generation.

- *"It realises the importance of things they were touching upon, things like climate change and stuff like that, having children talking about it makes you pay attention to issues"*
- *"They were using a younger audience to make it more relatable"*

However, some respondents felt that the video was unrealistic, and that the terminology used by the children in the video would not be the same as what is used by children typically.

Social media channels such as Facebook were suggested as ways in which SP Transmission could feed this type of information to their consumers. Another suggestion was to consider directing consumers where to find this information when they are moving to a new home, so they could see where their bills are going.

One table also agreed that electric vehicles is a topic that we should be talking about and felt that it would be relevant to start conversations about this.

Ownership and funding

During this section, the SP Energy Networks representative presented information on who owns SP Transmission and how the company is funded.

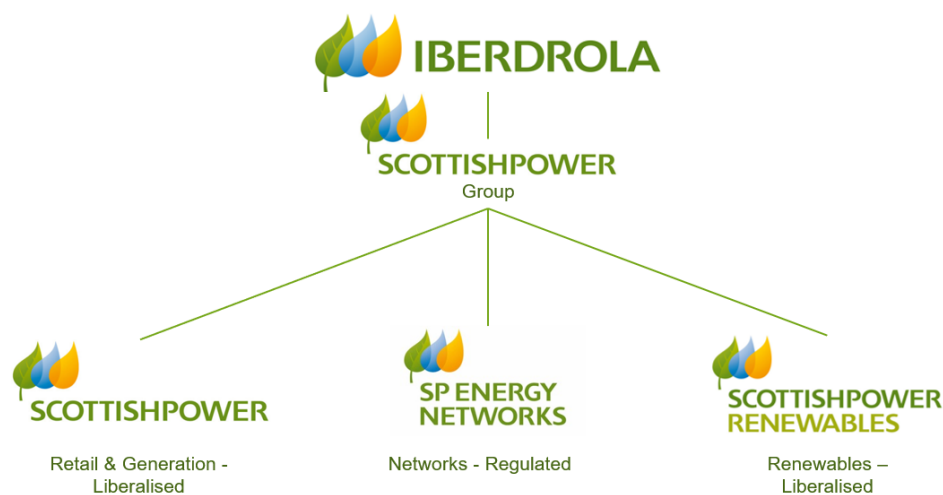


Table discussions then focussed around respondents initial thoughts, their understanding, and how this information could be communicated most effectively. In addition, attendees were asked if they would be interested in knowing this information, in what detail and exactly where they would look to find such information.

The majority of attendees said that they would not go looking for the information in this section, unless they had shares in the company.

- *"I don't think that you would need the information. If I looked at a company and thought they were doing well and wanted to buy shares in it but then saw debt on the company it would actually put me off"*
- *"I think if it was a different audience, like people who wanted potential shares"*

Some also felt that this information wasn't necessarily relevant as they'd only like to know information that was of interest to the consumer directly, in particular the cost of their bill.

- *"I don't think as a customer, I can see the relevance of it. I understand it, but why would I want to know that information?"*

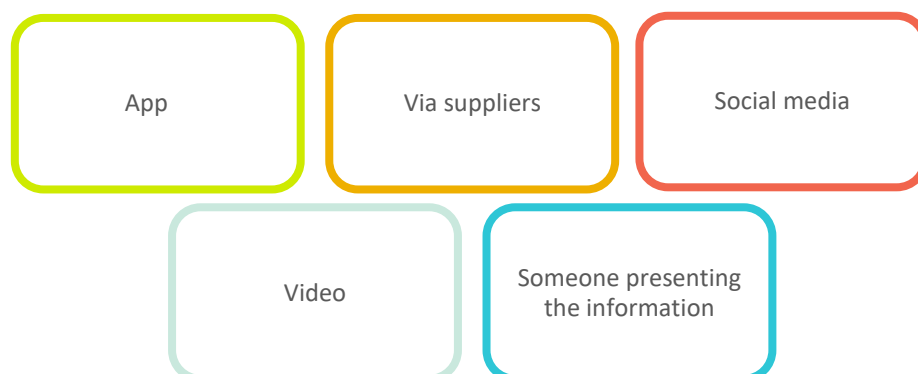
- *"I wouldn't have time to sit and consume all of this information, I just need to know the stuff that is relevant to me rather than the every day running of the company"*
- *"I think this is definitely for companies who are wanting to know all of this information, I don't think it is for a consumer"*
- *"I just don't feel like we can do much with the information"*
- *"It didn't mean much to me as I don't have a share in it, so I don't really care. Unless it's affecting the price that I'm paying for my supply"*

Suggested improvements to communicating this information more effectively included; changes to the terminology, including imagery, and more information to explain the terminology used. One suggestion put forward was to have something whereby you can hover a cursor over a word and it will display an explanation of that word:

- *"They could include pictures. I don't know what pictures, but it just looks boring"*
- *"Just simple things that people can consume really easily, for example if you could hover over something and it comes up with a little definition. I think small simple things"*

One customer likened this information to the way football teams are financed and others felt that this was a good approach to putting the information into context. Another likened the information to the way that shares work in the workplace and respondents tended to be in agreement that these real-life examples were useful in understanding the information presented.





Suggested channels by which to share this information with consumers via included:






Bills

In this section, the SP Energy Networks representative presented information to the room about where money from their electricity bill goes. This included a breakdown of a typical electricity bill and information about what SP Transmission spend their money on, both short and long term.

Some respondents struggled to understand the more technical/business side of how SP Transmission are funded at this point and some felt that this was designed more for shareholders than the general public. Specifically, respondents felt that the information on the 'bridging the gap' slide was important for consumers, but specific percentages of where money was going was considered irrelevant for the consumer.

-  *"The energy and business side of it"*
-  *"The business and how it is all funded which I think could be applied to any big business"*
-  *"It seems too corporate. Specifically, the last slide, how many customers pay to the bill in percentages. It seems like it was designed for shareholders"*
-  *"I think the information on the last slide, customers need to know. I think that is something you only really know on a case by case basis"*

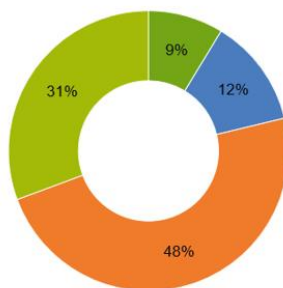
Some respondents were still unsure where the money from their bill was going after receiving this information and others asked questions about who makes profit from this.

-  *"Yeah, I get where you're coming from but I was kind of wondering where all of the rest of the money was?"*
-  *"How does it even make money, like where does the money go?"*
-  *"So who actually makes all the money?"*

At this point, moderators gave a hand out to each person on their table (appendix 3) which detailed SP Transmissions bill components and respondents were asked to highlight anything that they were unsure of.

Breakdown of a typical electricity bill

SPT Bill Components



- Operating Expenditure
- Rates & Other Taxes
- Investment
- Return

- Of the **£37** per domestic electricity customer per annum:
- 9% is to cover “day to day running” of the SPT Network (Staff costs , Network Maintenance etc.)
- 48% is related to investment in the assets of the Network (Towers/Cables/Poles etc)
- 12% is to cover payments due to local and national government (Rates + Taxes)
- 31% is to remunerate Investors for past investment (Equity & Debt)

Source: [Ofgem PCFM Nov-18](#)

Some comments were made about the visual aspects of the diagram, particularly in reference to the colours used and respondents felt that this would be difficult for those who are colour blind to understand.

- “First of all, the colour schemes, if someone is colour blind they can’t see that, that might be a major obstacle for them to understand. They could probably use a better tone of colour as well, something that is probably brighter that can stimulate someone a lot more. The dark shade of blue, from a psychological perspective, it’s quite boring”
- “If someone is colour blind, they need to have that information so neutral colours”

Others suggested that there was too much text and that this could be improved by highlighting key aspects and streamlining the information presented.

Overall, the majority were not interested in knowing this level of detail and would prefer to only know information that is directly linked to consumers. Key bits of information that consumers felt necessary were the day to day running costs and the percentage spent on investment in assets.

- *"I think because we pay this company and we pay that company, you don't really know what it's for. You are more interested in what they pay the government and what they pay the council to go back to us, rather than spending it on a company you have never heard of"*
- *"I think the only thing that is catching my eye is the day to day running"*
- *"The bits about 9% day to day running costs also 48% investment, they would probably stick to someone"*

There majority of respondents said that they would not go looking for this information, however they suggested that it should be made available if people did want it and suggested this would be best placed on their website.

How do SPT make money?

During this section, attendees were presented with information about how SP Transmission make their money.

Recap - Components of Revenue

- SPT Funded through Use of System Charges (UoS) which are levied through customers bills.
- The amount of these charges are set by Ofgem through the RIIO Price control process
- This Revenue is made up of a balance of:
 - Funding for Day to Day expenses (Salaries/Bills/ Network upkeep)
 - Remuneration of past investment on the Transmission Networks (Assets)
 - Non Controllable Costs – Taxes/Rates
 - Return – interest on debt and returns to shareholders
 - Incentives (government / stakeholder priorities)



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The majority of respondents said that there was too much information at this point:

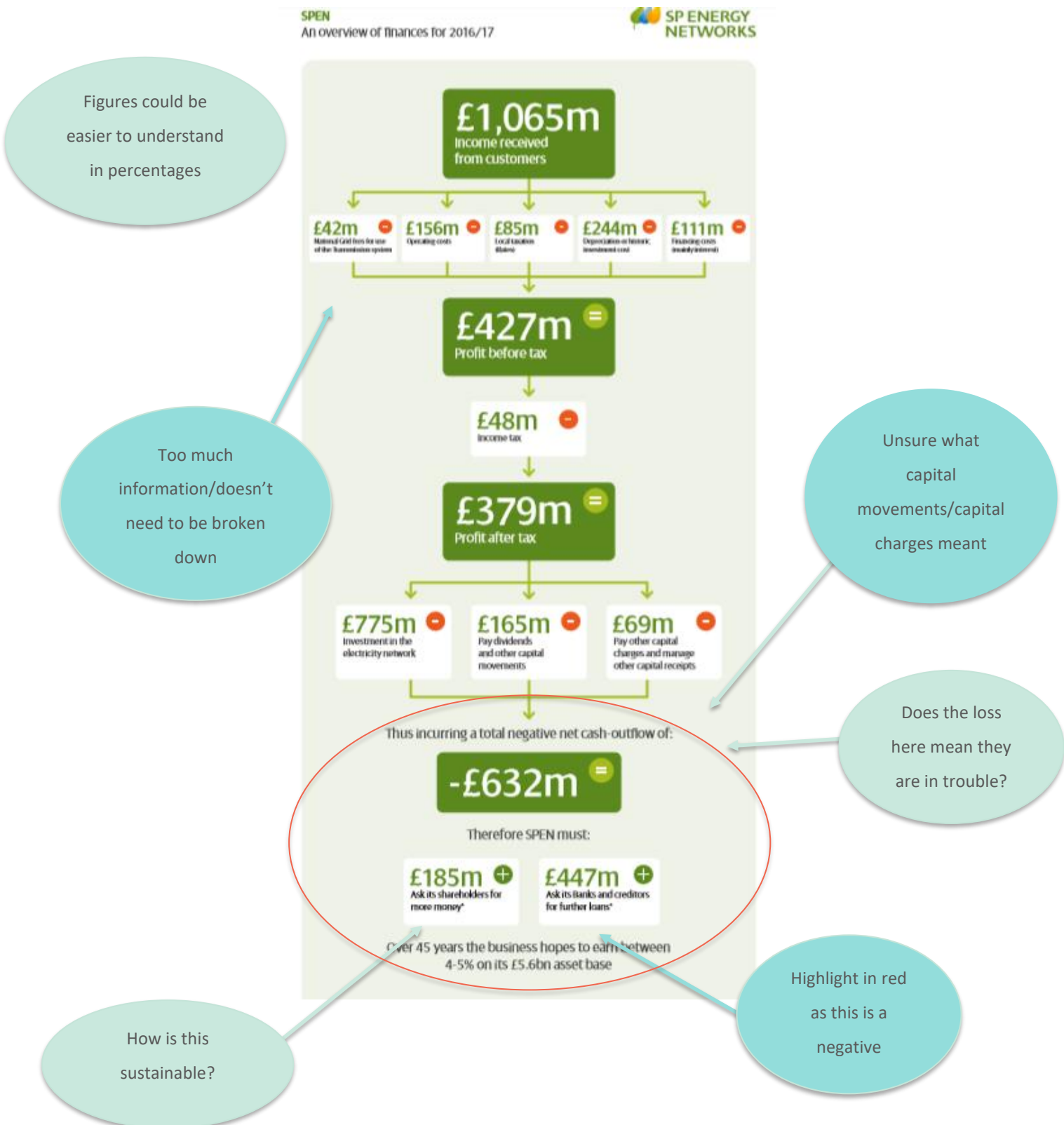
- *"It's all a bit overwhelming"*
- *"It's too much"*
- *"There's definitely a lot of information there"*

Suggestions for improvements included making the information simpler, particularly focussing on making adaptations to the terminology used.

The 'future consumers' table also suggested that this information needed to be presented in a way that is suitable for the younger generation and suggested that this may be best using an animated feature. They also suggested that social media channels would be most suitable for the younger generation.

- *"The whole idea for the video is that they are trying to introduce younger people to this, I think if they want the younger generation to understand it they have got to make it more suitable for them to understand, a lot of the things I don't even understand"*
- *"They need to target children, having terminology they will understand and young adults, try and make it as a simple possible. Maybe social media"*
- *"I think trying to promote it on an animated feature"*

At this point, moderators gave a hand out to each person on their table (Appendix 4), which was an overview of SP Energy Networks finances. Respondents were asked to highlight key points that they found difficult to understand. Key points that were picked out by consumers included:






In addition, a number of respondents had circled the bottom section of the handout and suggested that they did not understand this information:





In general, the majority of respondents seemed to find the handout useful and liked the flowchart style. Some respondents said that they would need more clarity on some terms and felt that this could be better understood by consumers if it was in simpler terms. Some respondents suggested that the breakdown of figures was not needed.

- *"I just think a wee bit of clarity just around the appreciation of the assets and putting investments into the grid"*
- *"I don't think that the breakdown of those costs is relevant, I think if you categorise that as your operational costs or something, I think people are only going to pay attention to the green boxes. I think as long as you have got things to explain what they mean then that would be relevant and as long as people understand that jargon"*
- *"You don't need to break those costs down, if you banded some bits as one"*
- *"It's a bit lost in translation with the boxes, you kind of get it but then you lose where you're going, I don't know what that means, I think it could do with either simplifying the jargon or leaving it out. Or, if it's important to put those bits in, then do something that would make it a bit more easy to read for someone"*
- *"It needs to be more clarified"*




There were also a number of questions about the concept of 'debt' and the amount of money going out in comparison to the amount of money coming in. Respondents were concerned about the sustainability of this.

-  *"How is that sustainable then if you're just constantly in debt. If they are in that much debt how did that become sustainable?"*
-  *"It just seems a lot of money going out"*
-  *"I just kind of looked at that double minus section because I just think there's a lot of money going out"*

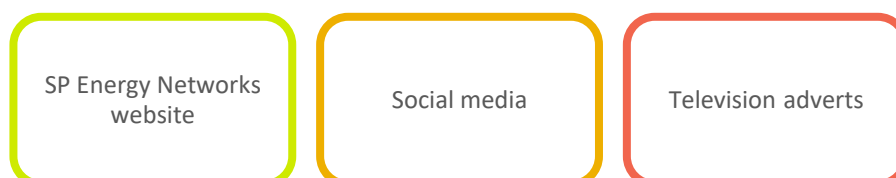
There were also some questions about whether the diagram meant that the company were running at a loss and felt that this was misleading, and one respondent found this information to be deceptive.

-  *"How's it still a business then?"*
-  *"It can't run at a loss every single year since this is not a private company. I actually think it's unfair to put that out. I actually think that's deceptive"*

A number of respondents also asked questions about where SP Transmission borrow their money from.

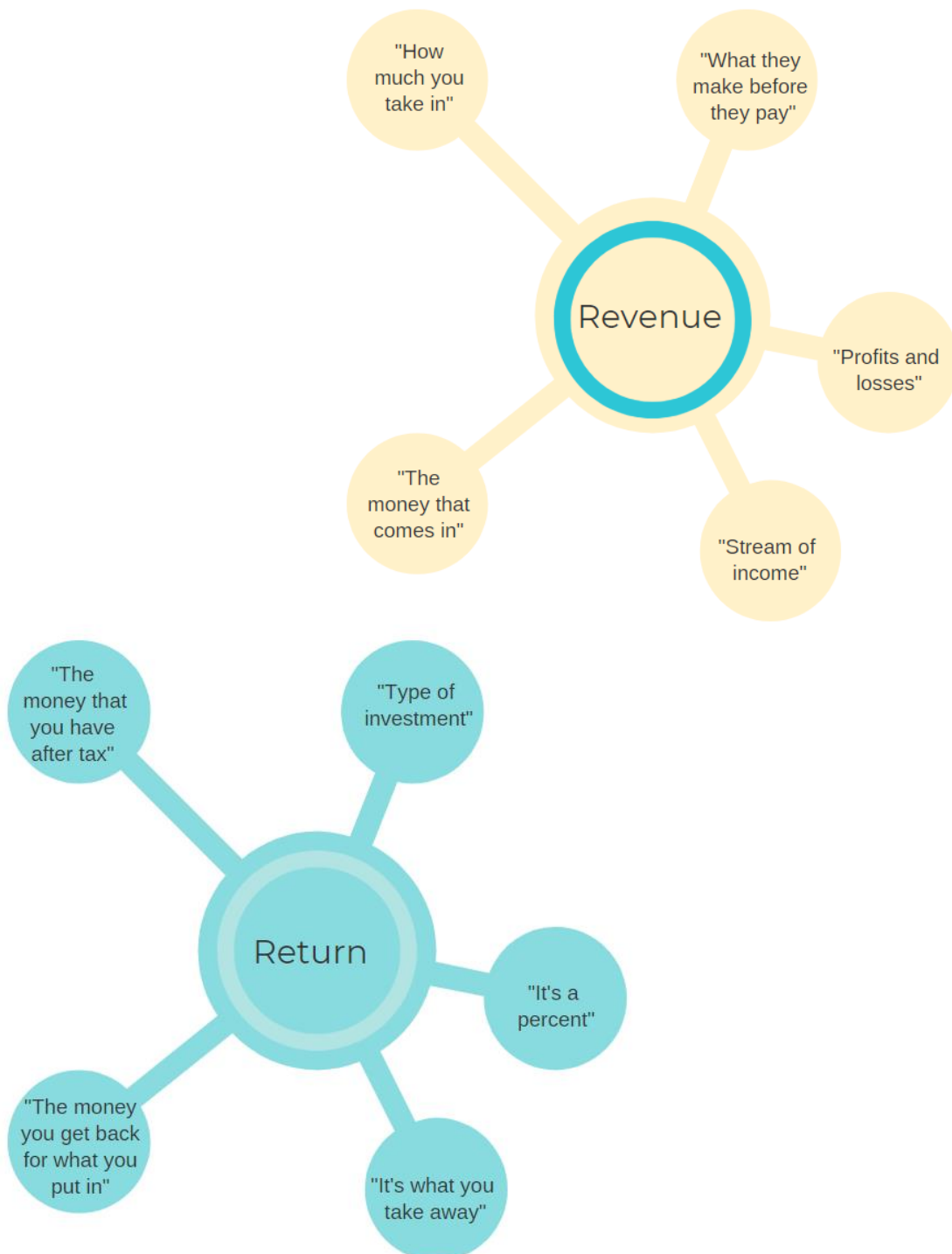
-  *"Who do they borrow money from?"*
-  *"Is it the bank? Should it not be the government? If they borrowed from the government then if there was no electricity their country would come to a standstill. So, the government should maybe have interest free loans"*
-  *"I would like to know where they borrow money from"*

Suggestions for where this type of information should be made available included:



Understanding profit

During this section of the workshop, attendees were asked about their understanding of the terms: “revenue”, “return” and “profit” and were asked if they considered them to have the same meaning or not. Definitions included:





The majority of respondents seemed to understand that there was a difference between the three terms but were unsure what this was specifically and found the differences difficult to define.

- *"I think I know what the difference is and then I realise no I don't"*
- *"It's something you know, but you don't know it"*
- *"I would say it's different, return doesn't give you a figure, but profit does – doesn't it?"*

Consumers were then asked about their views on how SP Transmission make profit and for their opinions on the levels of investment that SP Transmission are making. There remained some confusion amongst consumers about how SP Transmission make money at this point.

The majority felt that SP Transmission were making vast levels of investment and viewed this in a positive light.

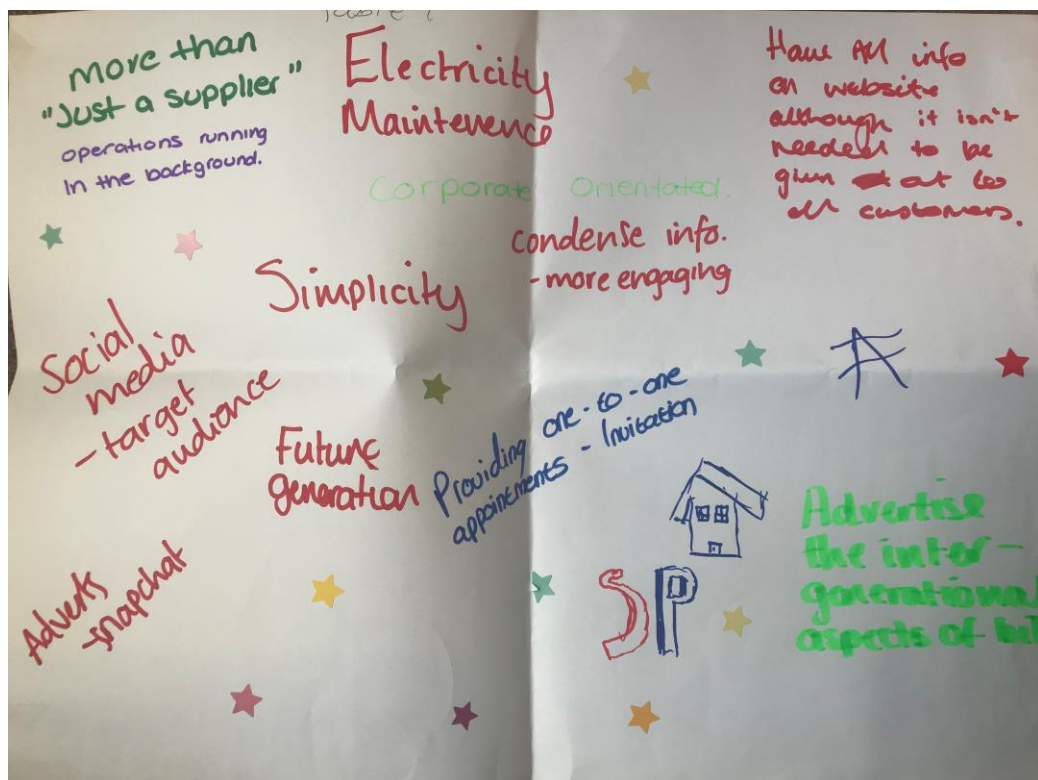
- *"It's a vast level of investment"*
- *"It's definitely a good thing"*
- *"It's obviously working as there hasn't been a power cut"*

Summary of learnings – poster exercise

At this point, moderators distributed a piece of A3 paper to each table, alongside a selection of creative materials, and asked respondents to create a poster as a group to summarise everything that had been discussed during the workshop. The key points they were asked to cover were:

- How do SP Transmission make their money?
- What aspects should be considered when thinking about their finances?

The posters were then shared with the rest of the workshop, presented by the moderator on each table. A copy of each poster can be found in appendix 5 but an example from the session can be found below:



Key points from each poster included:



- *"More than just a supplier, operations running in the background"*
- *"Electricity maintenance"*
- *"Social media channels – snapchat adverts"*
- *"Advertise the inter-generational aspects of bills"*



- *"Relevance to individual finances"*
- *"Investors/dividends, debt and investment"*
- *"Future"*



- *"Monopoly regulated"*
- *"It costs a lot to maintain assets like pylons, the grid"*
- *"Don't make a lot of money"*
- *"SP Transmission – distribution generation – retail - consumer"*
- *"Equity = debt to make up"*
- *"Iberdrola – parent company shareholder"*



- *"Electricity maintenance"*
- *"Happy consumer"*
- *"Super investing"*
- *"Wind farms, electrical vehicles and solar panels"*

During this exercise, a number of respondents commented that they had learned a lot during the session and were previously relatively unaware of what went on behind the scenes of their electricity supply, beyond the role of their supplier.

Some attendees found it difficult to summarise what they had learnt from the session:

- *"I can't, honestly I'm finding this really hard because I can't picture in my head exactly"*
- *"I can't get my head around it"*
- *"It's hard to make a poster about what we've been told today"*

The majority of groups made reference to the infrastructure and the service that SP Transmission provide. Many also spoke about the maintenance of the infrastructure:

- *"I actually think you know, to me the company isn't about actual transmission. It's their infrastructure. The actual infrastructure and how they provide from the power station to people. To me, they're more of a service company than anything else"*
- *"It's more about how they get it from the power station to the actual substation"*
- *"Draw a turbine or something"*
- *"Draw it like a big pylon"*
- *"Electricity maintenance"*

A number of respondents also made reference to the level of investment that SP Transmission are making:

- *"What about the investment?"*
- *"What you could do is, so from investments you could do it with loads of different colours. Like a black on a green one. So that it basically covers investments"*

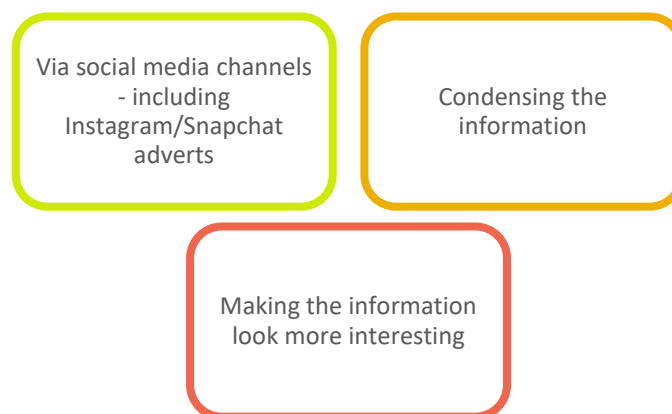
Respondents appeared to find it difficult to recall specific details relating to the financial information provided during the workshop and commented that this wasn't information that they would necessarily remember in the future.

- *"Now you're asking me to think about things on my mind it kind of almost relays the fact that most of it isn't really relevant"*
- *"There were certain things when we were talking about that I found interesting, but saying now when I go away, I probably won't think about it"*

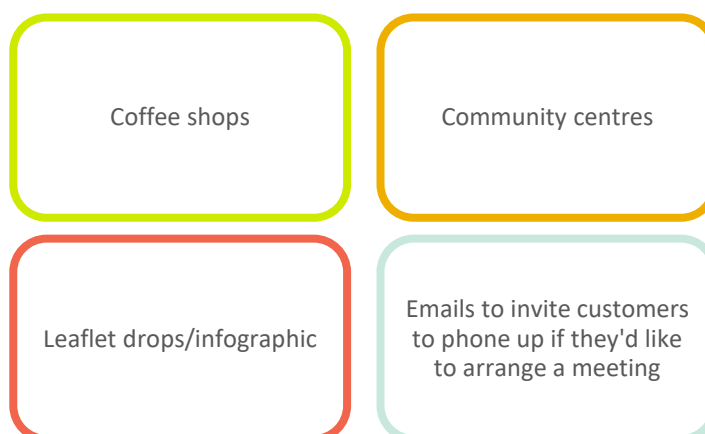
Respondents also felt that the information provided throughout the workshop was much better suited to shareholders than the general public.

- *"I think it's information you would give to an accounts or finance director"*
- *"It's definitely for a shareholder with all the figures, it's more shareholder related. You need to make it more accessible for all, this is fine for a shareholder but they need to have separate and additional information, they need to make it more separate for the consumer"*

Many respondents had suggestions at this point about how the information could be better displayed to the general public. The 'future consumers' table suggested that it is important for SP Transmission to adapt the information for different types of consumers. Specific suggestions for targeting a younger audience included:



Specific suggestions for targeting an older audience were to consider face to face information sharing via:







Video feedback




At the end of the workshop, a short two-minute video was played to attendees with the aim of summarising all of the key information that had been presented throughout the evening. The video was created by Explain based on the information provided by SP Energy Networks.



Overall, this video was well received by attendees, with the majority describing it as simple and straightforward.

-  *"I think it's probably a lot better than the first video, having someone talk through it and summarise it"*
-  *"It was nice and simple and kind of explained everything"*
-  *"It just feels like a soft video, it was something for all"*
-  *"It's nice and straight forward"*

Some consumers felt that aspects of the video and terminology used could be further simplified. For example, one felt that 'OFGEM framework' was too complex for the consumer and the term 'monopoly' was also considered complex. Suggestions included changing this to explain that SP Energy Networks look after the area on behalf of the government.

-  *"If we didn't use the word monopoly and they used something like government approved"*
-  *"They could say the government has said that they own this part of the company so we are looking after that area on their behalf"*
-  *"A lot of the language that was used was too much, make it simpler"*

Some respondents felt that the video gave too much detail and should be condensed:

- *"I think you can condense it a little bit"*
- *"It's too much, it's going into too much detail"*
- *"It seems maybe there's a little too much detail. I would have to see it again but in the OFGEM bit it maybe went on a little too much"*

Suggestions of where to share the video included; YouTube, television adverts, adverts when waiting for YouTube videos to start, via the website.

4.0 Conclusions and recommendations

Based on the results outlined, conclusions and recommendations are outlined in this section.



Conclusions

When considering the results from this research, it should be taken into account that these findings are from one workshop and thus, conclusions are limited.

In general, the majority of respondents had heard of SP Energy Networks previously, although many referred to the organisation as an 'energy supplier'. When asked about SP Transmission specifically, awareness across all consumers was generally low, with none of the 'future consumer' respondents having heard of SP Transmission previously. Some respondents suggested that SP Transmission may be responsible for maintaining the grid and others made educated guesses based on the term 'transmission'.

After being presented with information about the roles and responsibilities of SP Energy Networks and SP Transmission, some respondents were confused about their roles in comparison to the role of an electricity supplier. Some attendees felt that this level of background information was unnecessary for a consumer to be aware of, as it would not affect them directly. There was also some confusion at this point about the analogy used to compare the role of SP Transmission to motorways.

The majority of attendees found the information provided throughout the presentation complex and did not find this to be easily digestible. Suggestions for improvements to the presentation itself included; providing better examples, simplifying explanations used, simplifying the language used and exploring the use of imagery. Additionally, the term 'monopoly' caused some confusion within the workshop.

As the presentation moved onto exploring financial information relating to SP Transmission, including ownership, funding, bills and profit, the majority of respondents stated that they would not typically seek out this information themselves and felt that this wouldn't be relevant for consumers. Many respondents felt that this information was more relevant and applicable to shareholders than the general public. Information that *was* considered to be in the interest of consumers was mainly surrounding the cost of their bill directly.

One respondent likened the information surrounding SP Transmissions finances to the way that football teams are financed and others thought that this was a good approach to putting this into context. Another likened the information to the way that shares work in the workplace and respondents tended to be in agreement that these real-life examples were useful in understanding the information presented.

The videos presented within the presentation were well received by respondents. Some were unsure of the overall aim of the SP Energy Networks video and felt that the dialogue spoken by the children was unrealistic. However, others found the use of children within the video to be powerful, particularly in highlighting concerns for the future generation. Respondents felt that that the summary video at the end of the workshop could be simplified further to make it more applicable to domestic consumers but felt this was a good way of summarising key information.

Overall, attendees felt that the information provided during the workshop would be more relevant to shareholders and that SP Transmission should ensure to adapt the information when targeting domestic consumers and the general public. They felt that the information should be condensed and simplified, with different terms used to explain things in a more simplistic manner. Respondents also felt that the information should be adapted depending on target audiences. Specific channels that were suggested to share the information via included:

- Social media channels such as Facebook, YouTube adverts, Instagram adverts, Snapchat adverts for the younger generation
- Face to face channels targeting coffee shops and community centres for the older generation
- Leaflet drops
- Infographics
- Email invites for customers to arrange a meeting

Recommendations

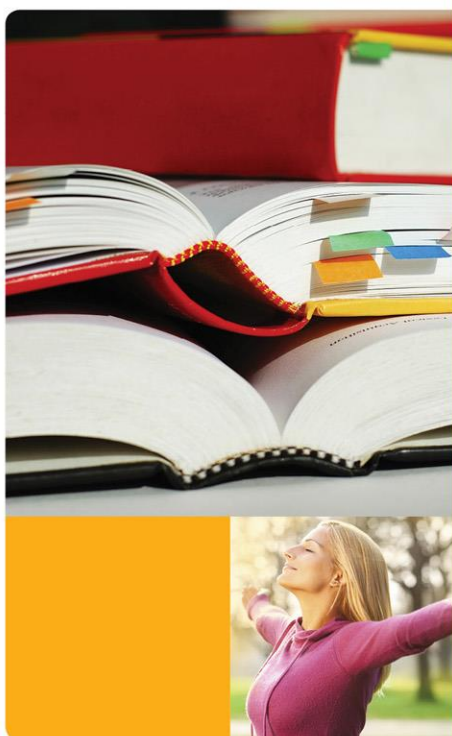
Based on the findings of the research, we recommend the following actions to best communicate information about SP Transmission to domestic consumers:

- Consider ways to raise awareness of SP Transmission alongside SP Energy Networks
- Exclude information that would not directly impact consumers as they felt this was unnecessary
- Consider using different analogies to explain the role of SP Transmission within the electricity network
- Use simpler terminology throughout – particularly when talking about financial aspects and consider ways to simplify the term ‘monopoly’
- Use more ‘real life’ and relatable examples to explain information relating to SP Transmission finances, for example the way that finances work in sport and the workplace

- Consider making adaptations to the videos used to further simplify and streamline the information presented, for example redefining complex terms and simplifying the aspects relating to OFGEM
- Consider adapting the information to be shared when targeting different audiences, for example younger and older consumers
- Look to have this information accessible to consumers, but don't provide to all consumers upfront as many will not find this relevant
- Consider the following channels for information sharing and raising awareness:
 - Social media channels such as Facebook, YouTube adverts, Instagram adverts, Snapchat adverts for the younger generation
 - Face to face channels targeting coffee shops and community centres for the older generation
 - Leaflet drops
 - Infographics
 - Email invites for customers to arrange a meeting

5.0 Appendices

The appendices contain the presentation, discussion guide, handouts and posters used in the workshop.



Appendix 1 – Presentation



Wednesday 13th February 2019

SP Transmission Consumer workshop



Introductions

Introductions

SP Transmission team:

Andrew Stanger
David Holland
Suzanne Taylor
Gillian Hurding

Explain:

Market research experts

Introductions

SP Transmission team:

Andrew Stanger
David Holland
Suzanne Taylor
Gillian Hurding

Explain:

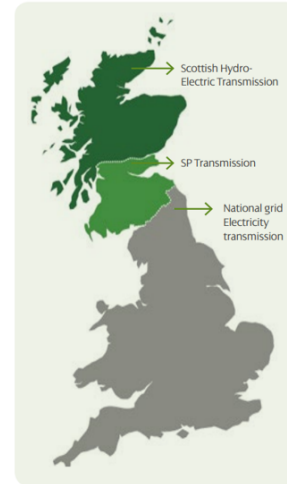
Market research experts

Over to you briefly...

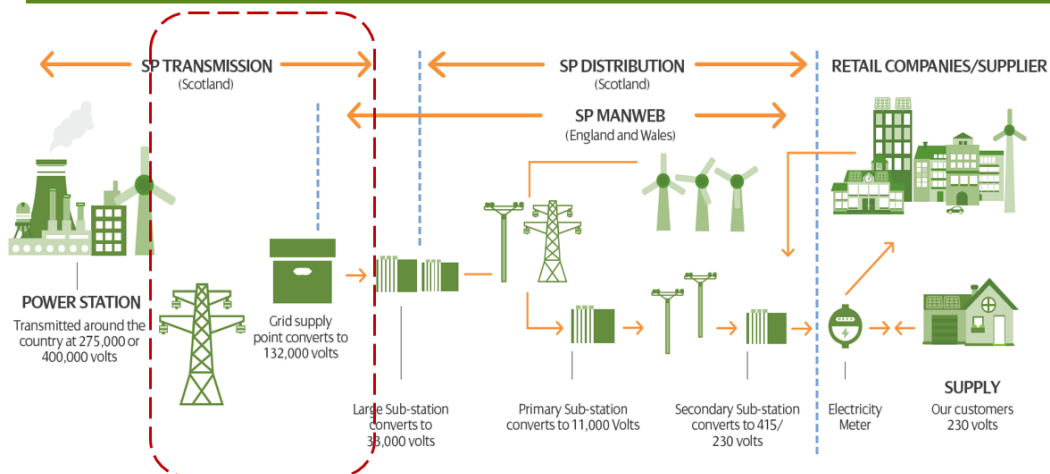
Who are SP Transmission, and what do they do?

Who are SP Transmission (SPT) – an overview

- SP Transmission plc is owned by SP Energy Networks, part of the Iberdrola Energy Group.
- Responsible for the **transmission** of electricity in central and southern Scotland.
- It's a natural monopoly, and regulated by Ofgem.
- Transmits electricity generated from power stations, windfarms and other utilities through its transmission network.
- Customers don't pay their bills directly to SPT, but around 5-6p per day of the average household bill goes to Transmission costs.



The GB electricity system – Our network

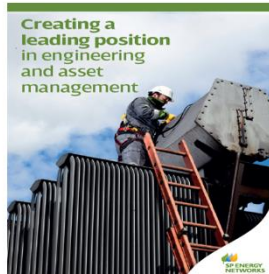


SPEN's business model

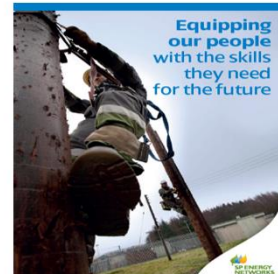
SPEN has three Strategic Anchors:



- More staff in local areas giving improved storm response and customer service
- Better coordination and greater flexibility of connections, faults and investment works
- Building enduring local relationships.



- Improved processes and systems
- Lower back office costs
- Improved flow of information through organisation.



- Recruiting from the local area
- Bringing in Graduates and Apprentices to replenish our workforce
- Becoming more customer and stakeholder facing
- Increasing flexibility to deal the low carbon transition.

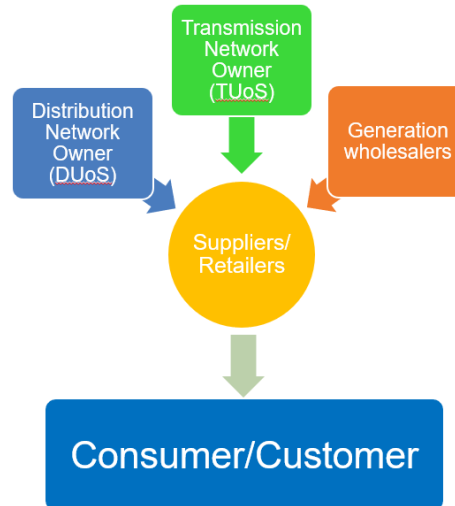
An overview - video



Regulation and the RIIO model

How do SPT make money?

- The Suppliers/Retailers are the “point of contact” for consumers/customers in the UK.
- Therefore all revenues are collected by the energy suppliers/retailers such as Centrica, Npower, Eon, Co-Op etc. on behalf of the whole energy supply chain.
- Prices for Network owners (Both Distribution and Transmission) are set by Ofgem via a price control.



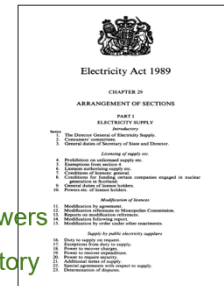
A brief overview of the structure of UK Energy

Privatisation of the energy industry occurred in 1991 leading to the creation of ScottishPower group.

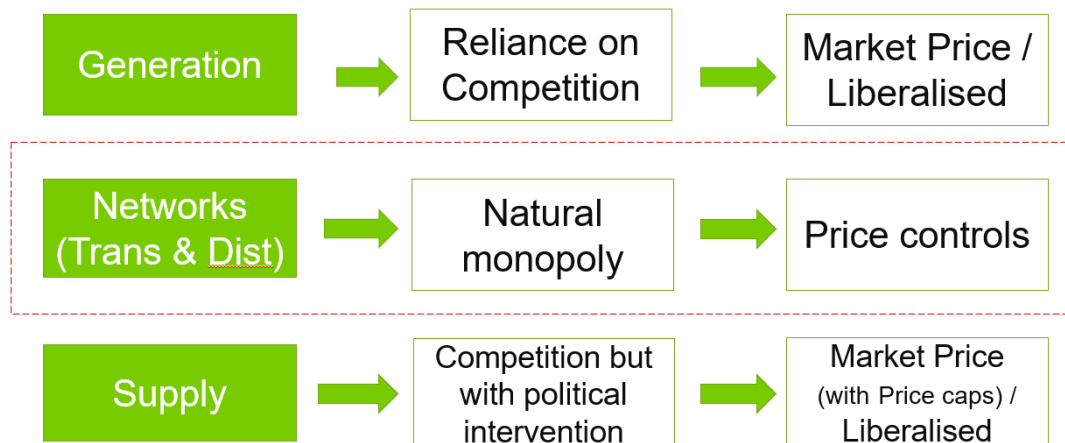
Business Separation of generation, network ownership and energy retail activities was implemented in 2001 leading to the creation of SP Energy Network as the owner of a geographical area of electricity network infrastructure.

Therefore in the UK:

- **Ownership** – transferred to private owners
- **Policy** – determined by government through statute
- **Regulation** – applied by the regulator Ofgem in accordance with their powers
- **Management** – delegated to network operators working within the regulatory framework and the private commercial arrangements with its owners

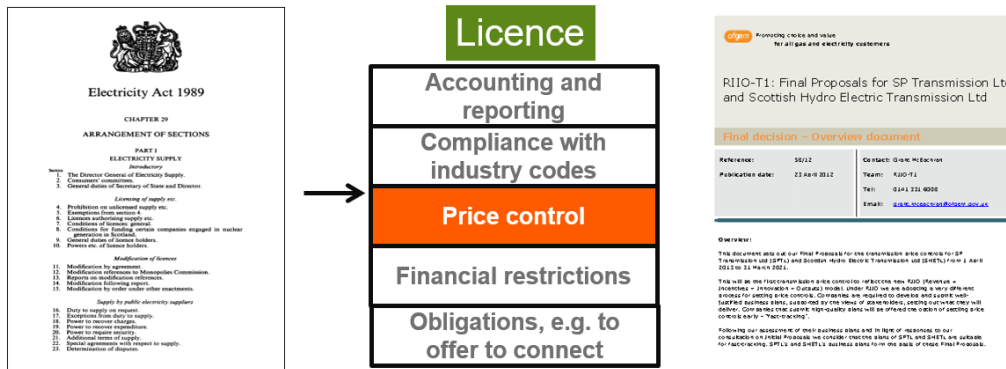


Value chain in electricity in GB



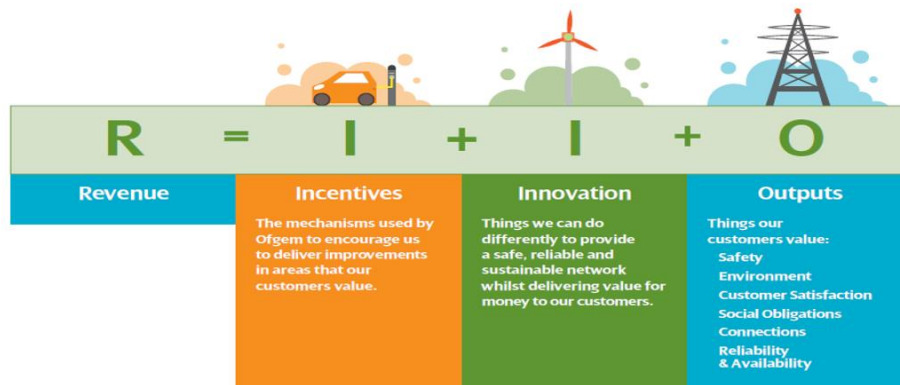
An overview of our regulatory environment - legislative background

The Electricity Act 1989 provides the primary legislation for the electricity industry. It provides the framework for licencing of activities and sets out duties of licence holders.



The RIIO framework

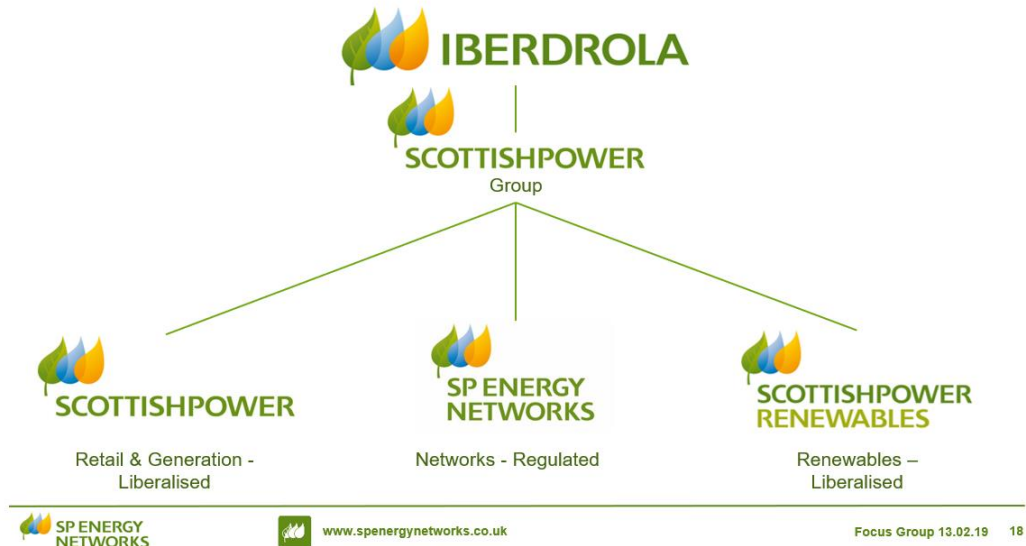
Ofgem's framework for setting price controls is called RIIO. RIIO emphasises incentives and innovation to drive better performance. It also regulates the delivery of outputs more effectively.



Over to you...

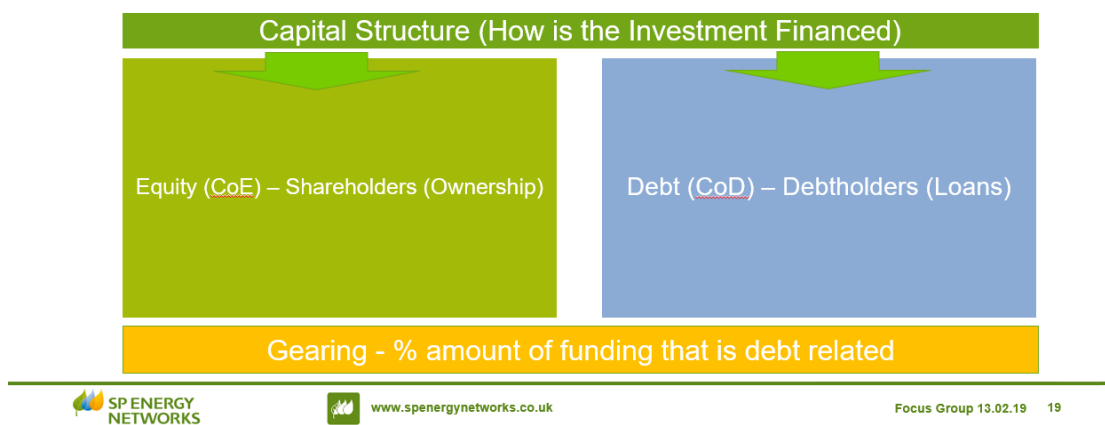
Who owns SPT, and how is the company funded?

SP Energy Networks – Who We Are



Types of Financing

SPT is funded through a combination of debt & equity in accordance with the directors' objectives of establishing an appropriately funded business consistent with the requirements of the Utilities Act 2000

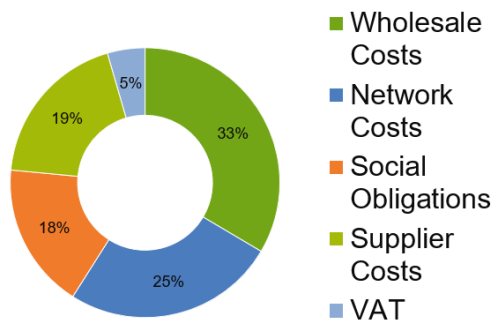


Over to you...

Where does the
money from your
bill go?

Breakdown of a typical electricity bill

Typical Bill Components

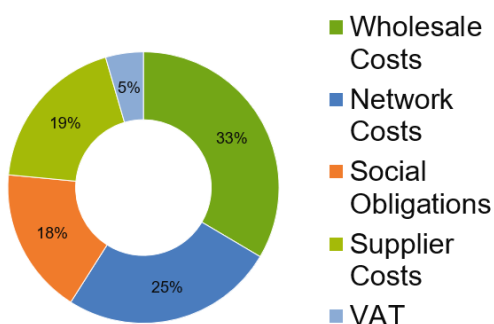


Source: [Ofgem](#) Oct-18

- **Wholesale costs** - how much your supplier has to pay to get electricity to supply you with energy.
- **Network Costs** – Cost of investment and upkeep of wires that carry energy through the network and across the country into your home.
- **Social Obligations** - Costs related to government programmes to save energy, reduce emissions and encourage take-up of renewable energy.
- **Suppliers costs** – Running of their own business (such as costs relating to sales, metering and billing). When they set their prices, they will also try to cover these costs, as well as to make a profit.

Breakdown of a typical electricity bill

Typical Bill Components

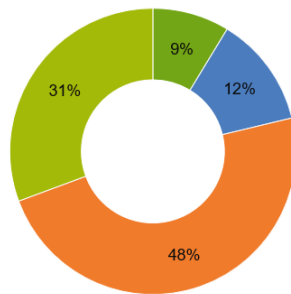


Source: [Ofgem](#) Oct-18

- Average annual UK domestic electricity bill is £577 per customer.
- Network Costs in total are **£125** per domestic electricity customer. **(c25%)**
- Transmission charges (Imbedded in Network Costs) in total are **£37** per domestic electricity customer. **(c6%)**
- Of this the average domestic customer in the UK pays £5 per year for SPT's services (c1%) – around 5-6p per day.

Breakdown of a typical electricity bill

SPT Bill Components



Source: [Ofgem](#) PCFM Nov-18

- Operating Expenditure
- Rates & Other Taxes
- Investment
- Return

- Of the **£37** per domestic electricity customer per annum:
- 9% is to cover “day to day running” of the SPT Network (Staff costs , Network Maintenance etc.)
- 48% is related to investment in the assets of the Network (Towers/Cables/Poles etc.)
- 12% is to cover payments due to local and national government (Rates + Taxes)
- 31% is to remunerate Investors for past investment (Equity & Debt)

What do we spend money on?

Network Investment (Long Term)

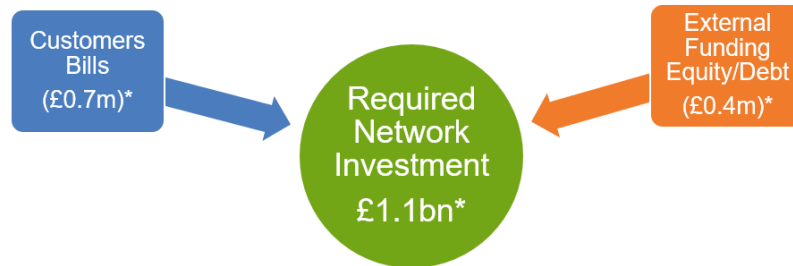
- Asset Replacement/Refurbishment
- Network Reinforcement
- Connecting Customers (e.g. Windfarms)

Operating costs (In Year)

- Operating the Network (Salaries etc.)
- Maintaining the Network (Inspections/Repairs)
- Payment of Rates/Taxes

Bridging the Gap

- For every £1 we collect from bills, we need an additional 58 pence to help fund our planned investment spending in RIIO-T2
- To bridge this gap and avoid significant increases to bills we borrow money
- We spread the funding of our investment which has average asset lives of 45 years across an extended period. This ensures the generations that benefit from the improvements are those who fund them– this makes our bills fairer and more sustainable.



* Nominal Prices

Over to you...

How do SPT make money?

Recap - Components of Revenue

- SPT Funded through Use of System Charges (UoS) which are levied through customers bills.
- The amount of these charges are set by Ofgem through the RIIO Price control process
- This Revenue is made up of a balance of:
 - Funding for Day to Day expenses (Salaries/Bills/ Network upkeep)
 - Remuneration of past investment on the Transmission Networks (Assets)
 - Non Controllable Costs – Taxes/Rates
 - Return – interest on debt and returns to shareholders
 - Incentives (government / stakeholder priorities)

Price control – components of revenue - Profit



Profits - Our profit is the revenue we have left after taking into account all of our operational costs (including Interest payments) and taxes in a given year.

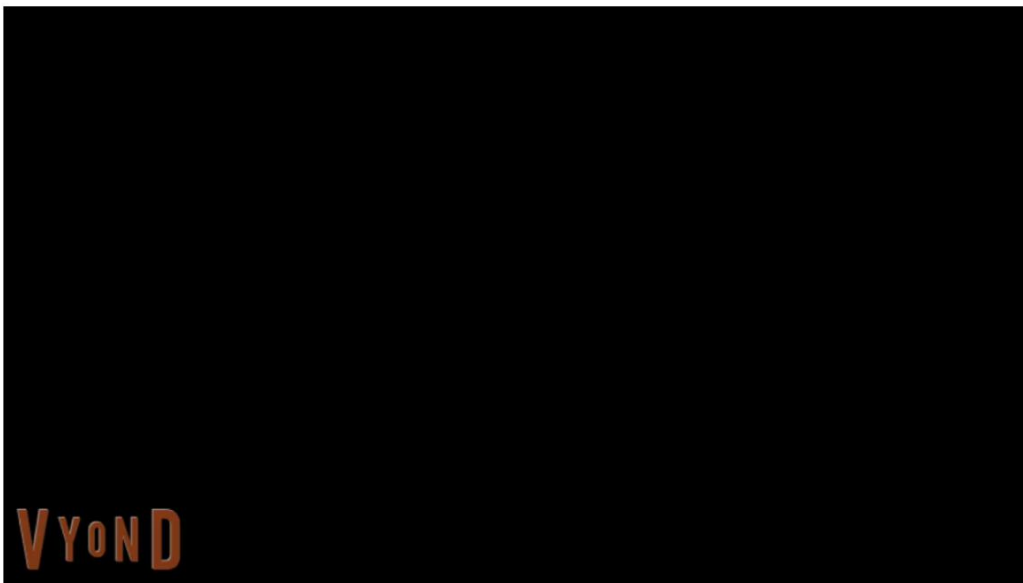


Profits can either be paid out to Investors or retained within the company to support investment.

Dividends we pay to our shareholders (Iberdrola) is a return on the money they have invested into our Network.

Over to you...

Who are SP Transmission?



Over to you...

**Any final
questions?**

**Thank you for
participating!**

Appendix 2 – Discussion guide

SP Transmission

Activity 1 - Understanding SPT Workshop discussion guide v2

6:30 - Opening (10 minutes)

WELCOME FROM SPEN CHAIR

- Hello, before we start I'd like to welcome you to this research workshop. My name is X from SP Energy Networks. Thank you very much for coming. We really appreciate you giving up your time to come and talk with us.
- *[Introduce others from SP Energy Networks.]* We have invited you today because we want to understand the views of members of the public in relation to our business. We are here to listen to your views, so that we can understand them first hand and make sure they are taken back into the business and influence our decision making and communication strategies.
- Please be assured that there are no right or wrong answers. We want to hear what you really think, so please give your honest views. Everyone's views are important so please all get involved.
- I'm about to hand over to X from Explain Market Research. Explain are facilitating this research for us, to ensure that it is carried out independently and in line with Market Research Society codes of conduct.

EXPLAIN MODERATOR TO THE ROOM:

- Hi everyone, my name is X and I'm here with my colleagues from Explain *[introduce team]*. We'll be running the discussions on each table.
- Before we do anything else, I need to go through some housekeeping information with you:
 - Fire exits and alarms

- Toilets
 - Refreshments
 - Mobile phones (silent and please do not use to look anything up – it is your views we want)
- Also to let you know, we work to the Market Research Society Code of Conduct. This means that everything you say today will be completely anonymous - we're only interested today in what is said, and not who said it. You also don't have to answer any questions you don't want to and are free to leave at any point if you wish.
- You'll notice that every table has a Dictaphone as we'd like to audio record the discussions today. This will allow us to listen back and transcribe them for analysis. Can I check that everyone is happy for us to record the discussion today?
- We also have a bell in the centre of each table. SP Energy Networks are going to be sharing lots of information with you this evening, and every time you hear a word or phrase you don't understand, please ring the bell, we'll make a note [**board with post-it notes**] and make sure it's clarified.
- We are now going to have a quick five-minute chat on our tables, then we will go back to X from SP Energy Networks to share some information. We've got lots to cover this evening, so we'll be keeping a close eye on the time.

6:40 – Awareness (5 minutes)

On tables:

Before we share lots of information with you...

- Had you heard of SP Energy Networks before you were invited to attend?
 - How about SP Transmission?
- If yes, how had you heard of them? (Probe for channels, e.g. news, word of mouth)
- What do you think SP Energy Networks might do?
 - What do you think SP Transmission might do? (Probe for role and responsibilities, moderator to collate ideas/keywords on flipcharts)

6:45 - **SPT to provide overview of SPT role, regulatory environment and RIIO model (slides 5-16), then hand back to tables for discussions**

(10 minutes)

6:55 – Who are SPT, what do they do, RIIO framework (15 minutes)

On tables:

- What are your initial thoughts on everything you have just heard? (Probe for positive/negative reactions)
- Is there anything you have heard that surprises you or that you didn't know?
 - Were your ideas of SP Transmission's role similar to what you've just heard? (Refer back to post-it notes from previous task)
 - How do you feel now you do know this?
- Is there anything you didn't understand?
 - Are there any elements you found particularly complex?
 - Any elements you found straightforward?
 - How did you find the language used? (Probe for simple/complex)
 - Was the language used appropriate? (If no, probe for specific examples)
- If you had to sum up this information in a phrase or sentence, what would that be? (Probe for key takeaways, keywords, anything which stuck with them)

- How do you think this information could be communicated most effectively?
(Unprompted)
 - What format would you like to see this in? Why?
 - What channels would be best? Why?
- Is this information you are interested in knowing as a consumer of electricity? Why/why not?
 - If yes, are there certain topics you are more interested in knowing about than others? (Unprompted, then prompt for role, structure of UK energy, regulatory environment, how SPT make money)
 - Why are you interested in knowing more about this area?
- Is this information something you would seek out independently? How would you seek this information out?
 - (If not seek out independently) Would you expect SP Transmission to provide you with this information? How would you expect them to provide you with this?
- Are there any areas you aren't interested in knowing about as a customer of SP Transmission?
 - What are these?
 - Why aren't you interested in knowing about them?
- What are your impressions of the video which was shared? (Probe for positive/negative reactions, specific likes and dislikes, probing for: visuals, information, look and feel)
- Do you think it explains what SP Transmission do well, based on the information you've heard so far?
 - Why / why not?

**7:10 - ** SPT to take room through 'ownership and funding' (slides 17-20), then
hand back to tables for discussions ****

(5 minutes)

7:15 – Ownership and funding (5 minutes)

On tables:

- What are your initial thoughts on everything you have just heard? (Probe for positive/negative reactions)
 - Is there anything you have heard that surprises you or that you didn't know?
 - Is there anything you didn't understand?
 - Are there any elements you found particularly complex?
 - Any elements you found straightforward?
 - How did you find the language used? (Probe for simple/complex)
 - Was the language used appropriate? (If no, probe for specific examples)
 - If you had to sum up this information in a phrase or sentence, what would that be? (Probe for key takeaways, keywords, anything which stuck with them)
 - How do you think this information could be communicated most effectively? (Unprompted then probe)
 - What format would you like to see this in? Why? (Unprompted then probe for examples such as visual, text, charts...)
 - What channels would be best? Why?
 - Are you interested in knowing this information? Why/why not interested? (Probe to understand specific aspects of interest)
 - How much detail would you like to receive on this subject?
 - If you were looking to find this information relating to SP Transmission, where would you expect to find this?
-

7:20 - **SPT to take room through ‘where does the money from your bill go’ (slides 21-27), then hand back to tables for discussions **

(10 minutes)

7:30 – Where does the money from your bill go (10 minutes)

On tables:

- What are your initial thoughts on everything you have just heard? (Probe for positive/negative reactions)
- Is there anything you have heard that surprises you or that you didn’t know?
- Is there anything you didn’t understand?
 - Are there any elements you found particularly complex?
 - Any elements you found straightforward?
 - How did you find the language used? (Probe for simple/complex)
 - Was the language used appropriate? (If no, probe for specific examples)
- If you had to sum up this information in a phrase or sentence, what would that be? (Probe for key takeaways, keywords, anything which stuck with them)
- Thinking about the example provided which shows how the average electricity bill is spent (**refer to ‘SPT bill components’ table handouts**), what do you think about:
 - The way this information is presented? (Moderator to probe for layout, colours)
 - The level of detail provided? (Moderator to probe for too much/not enough detail)
 - If not enough detail, what else would you have liked to know about on this topic?
 - How could it be improved to better communicate the information you want to know? (Probe for specifics)

- Are you interested in knowing this information? Why/why not interested? (Probe to understand specific aspects of interest)
 - Are you interested in knowing about how SP Transmission spend the portion of your electricity bill which goes to them?
 - Why/why not interested?
- How much detail would you like to receive on this subject?
- How do you think this information could be communicated most effectively? (Unprompted then probe)
 - What format would you like to see this in? Why? (Unprompted then probe for examples such as visual, text, charts...)
 - What channels would be best? Why?
- If you were looking to find this information relating to SP Transmission, where would you expect to find this?

7:40 - **SPT to take room through ‘how do SPT make money’ (slides 28-31), then hand back to tables for discussions **

(5 minutes)

7:45 – How do SPT make money (10 minutes)

On tables:

- What are your thoughts on everything you have just heard? (Probe for positive/negative reactions)
- Is there anything you have heard that surprises you or that you didn’t know?
 - How do you feel now you do know this?

- Is there anything you didn't understand? (Moderator to refer to definitions for questions from respondents)
 - Are there any elements you found particularly complex?
 - Any elements you found straightforward?
 - How did you find the language used? (Probe for simple/complex)
 - Was the language used appropriate? (If no, probe for specific examples)
- If you had to sum up this information in a phrase or sentence, what would that be? (Probe for key takeaways, keywords, anything which stuck with them)
- How do you think this information could be communicated most effectively? (Unprompted then probe)
 - What format would you like to see this in? Why? (Unprompted then probe for examples such as visual, text, charts...)
 - What channels would be best? Why?
- How much detail would you like to receive on this subject?

Moderator note - ensure this is covered:

- **(Share infographic handouts)** Looking at the example provided which gives an overview of SP Energy Networks' finances, what do you think about:
 - The way this information is presented? (Moderator to probe for layout, infographic style)
 - The level of detail provided? (Moderator to probe for too much/not enough detail)
- Does it help you to understand the company's finances? (Probe for yes/no)
 - Why / why not?
- How could it be improved to better communicate the information you want to know? (Probe for changes to format, emphasis on any elements, etc.)
 - Are there any terms or phrases you would need clarification to understand?

Please note: the numbers are from 2016/17 and are therefore out of date.

7:55 – Understanding profit (5 minutes)

- In general, what is your understanding of the word “revenue”? (Probe for respondents’ perception of definition)
 - How about “return”?
 - How about “profit”?
 - If not already covered: do you consider these the same thing?
- Based on the information you’ve heard, do you have any opinions on how SP Transmission make *profit*? (Moderator note: e.g. where the money comes from, how much they make)
 - Why do you feel this way?
- What are your opinions about the levels of investment they are making?
 - Why do you feel this way?

8:00 - Table poster exercise and shareback (15 mins)

Table moderator to explain the exercise: On the table, you have a piece of A3 paper and a selection of creative materials. As a group, please create a poster to summarise what you can, covering everything we’ve discussed tonight on the topic of;

- How do SP Transmission make their money?
- What aspects should be considered when thinking about their finances?

Be as visual as you can, for example create any diagrams or charts you feel communicate or support the information.

- Now choose one representative per table to share your poster with the room

[8:10 - Explain chair to facilitate plenary shareback from each table, then hand back to SPT]

**8:15 - ** Explain chair to play ‘explainer video’ (slide 32), then hand back to tables
for discussions ****

(5 minutes)

8:20 - Video feedback (5 minutes)

On tables:

- What are your impressions of the video? (Probe for positive/negative reactions, specific likes and dislikes, probing for: visuals, information, graphics)
- Does this example capture and communicate the information we've talked about this evening well?
 - Why / why not? What's missing?
- How could it be improved to better communicate the information you want to know?
- What do you think about communicating information in video format? (Probe for positive/negative reactions)
 - Is it an effective method?
 - Where would you expect to see this?
 - Where would you be most likely to pay attention to it?

8:25 - Overall (5 minutes)

- Now that you have heard about the different aspects of SP Transmission's finances, do you feel this is information you need to know about as a customer?
 - Why/why not?
- Would you proactively seek out this information? (Respondents to vote with hands up, moderator to count responses)
 - Which aspects of the information covered would you be interested in finding information on?
- Is there any other information you would seek out that hasn't been included here today?
 - What is this and why would you seek this out?
 - How could it be communicated most effectively?

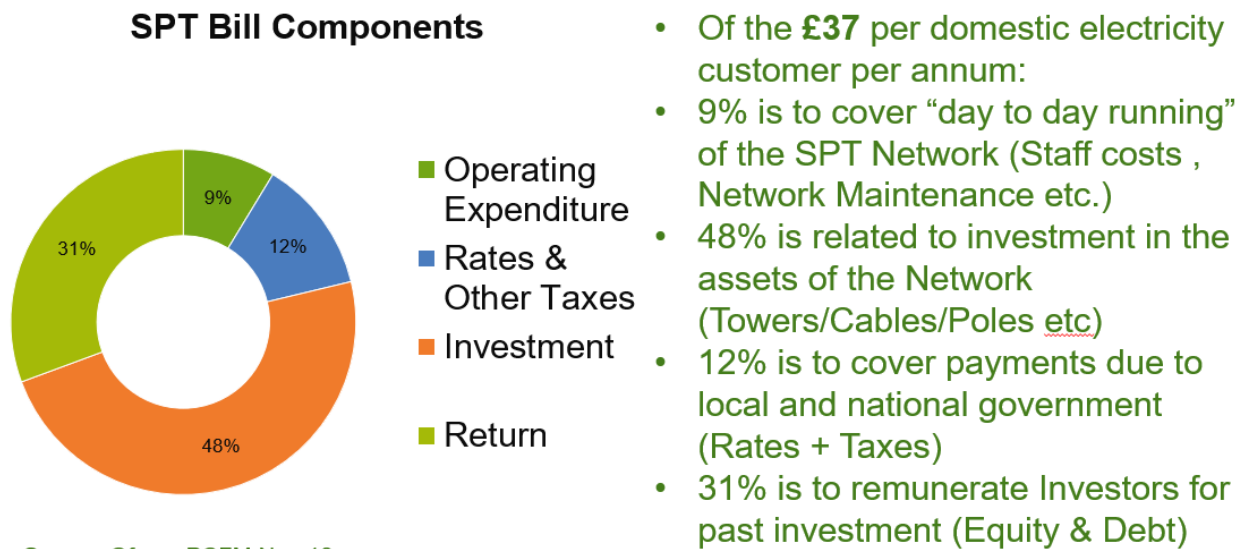
****SPT to answer any final questions and provide closing remarks****

EXPLAIN MODERATOR TO THE ROOM:

- **Online community:** We hope you've enjoyed sharing your views and ideas this evening. If you would like to take part in ongoing research through the SP Energy Networks online community, which is a private online space where we run discussions, your moderator is circulating a form on your tables. Please provide your email address so that we can send you an invitation to join. Your details will not be shared with anyone else.
- **Incentive:** The only thing left to do before you go is to give you each a thank you pack, as a token of our appreciation for giving us your time today. We'll need you to sign to say that you have received them. Once you've done that, you're free to leave and thank you again for coming along today and sharing your thoughts with us. Have a safe journey.

Appendix 3 – Bill handout

Breakdown of a typical electricity bill

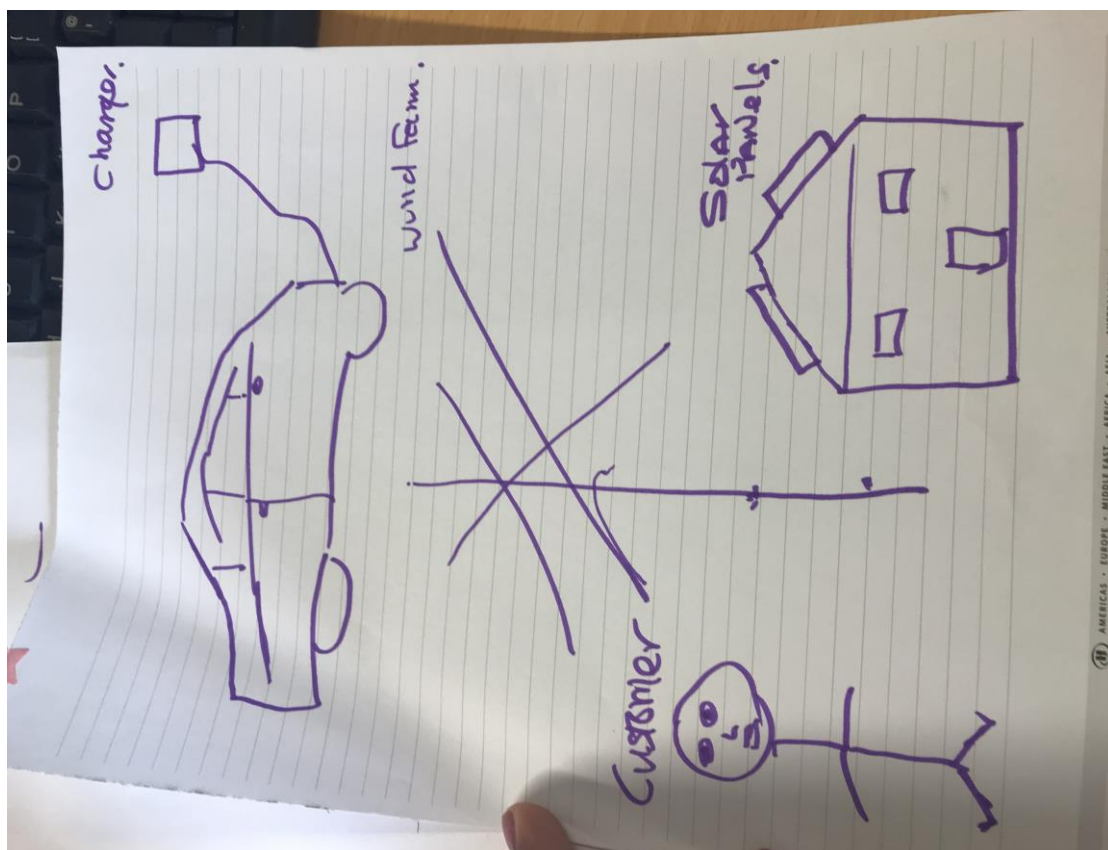
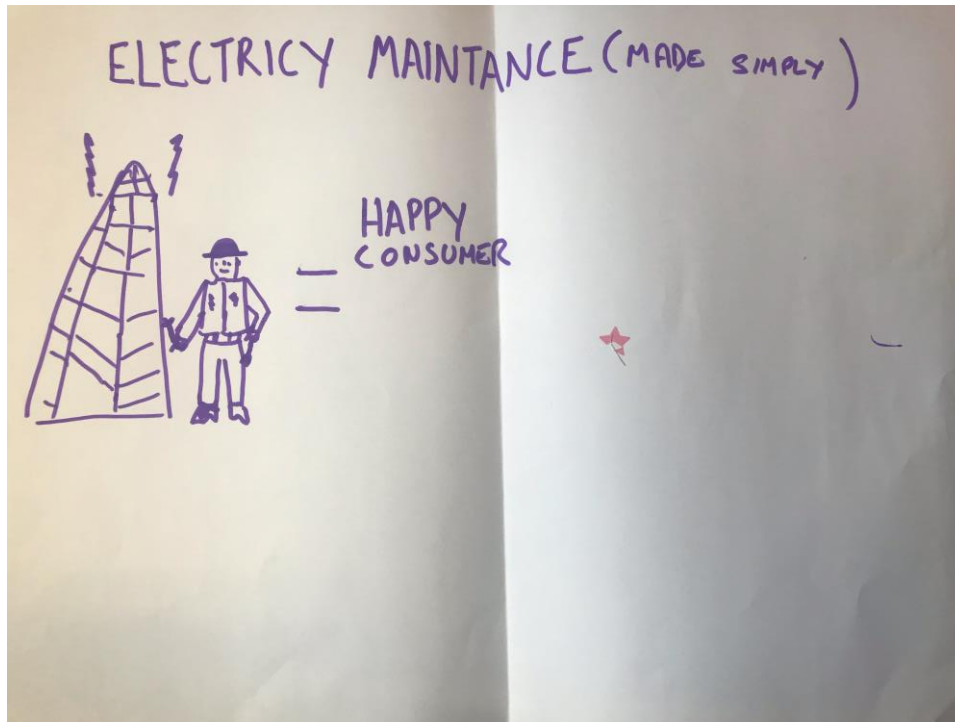


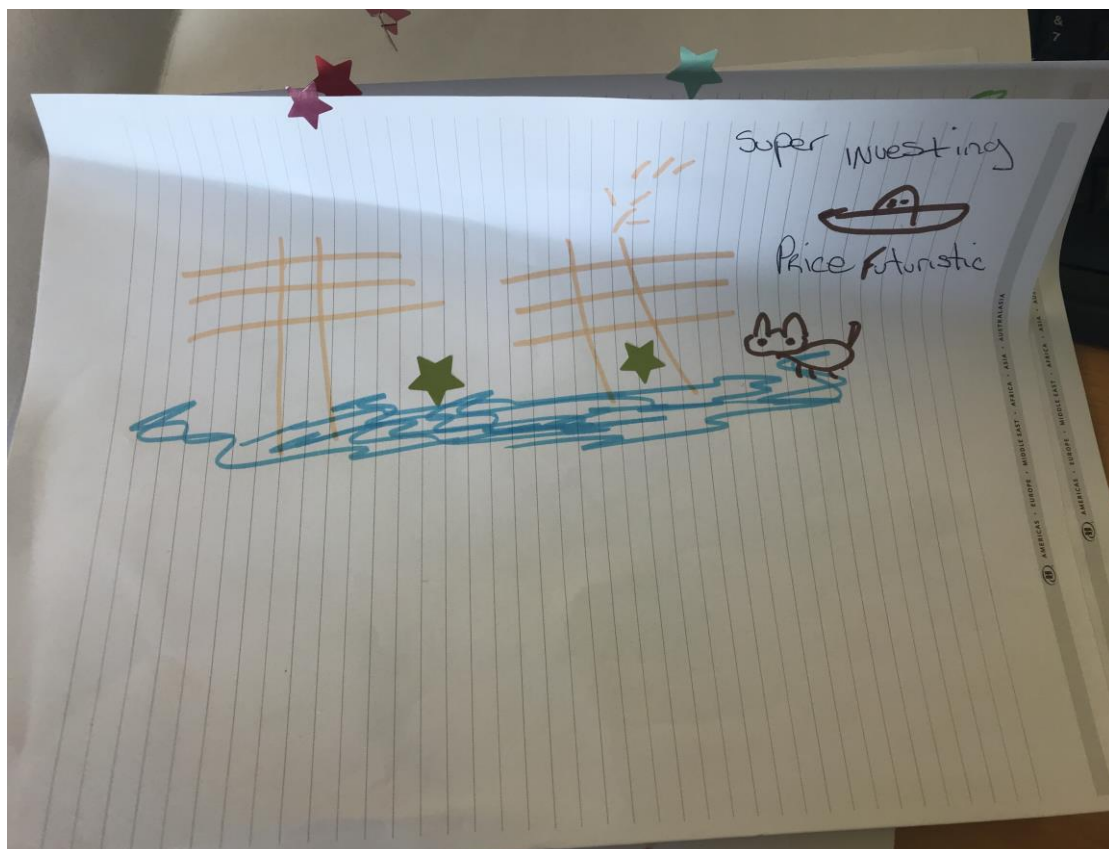
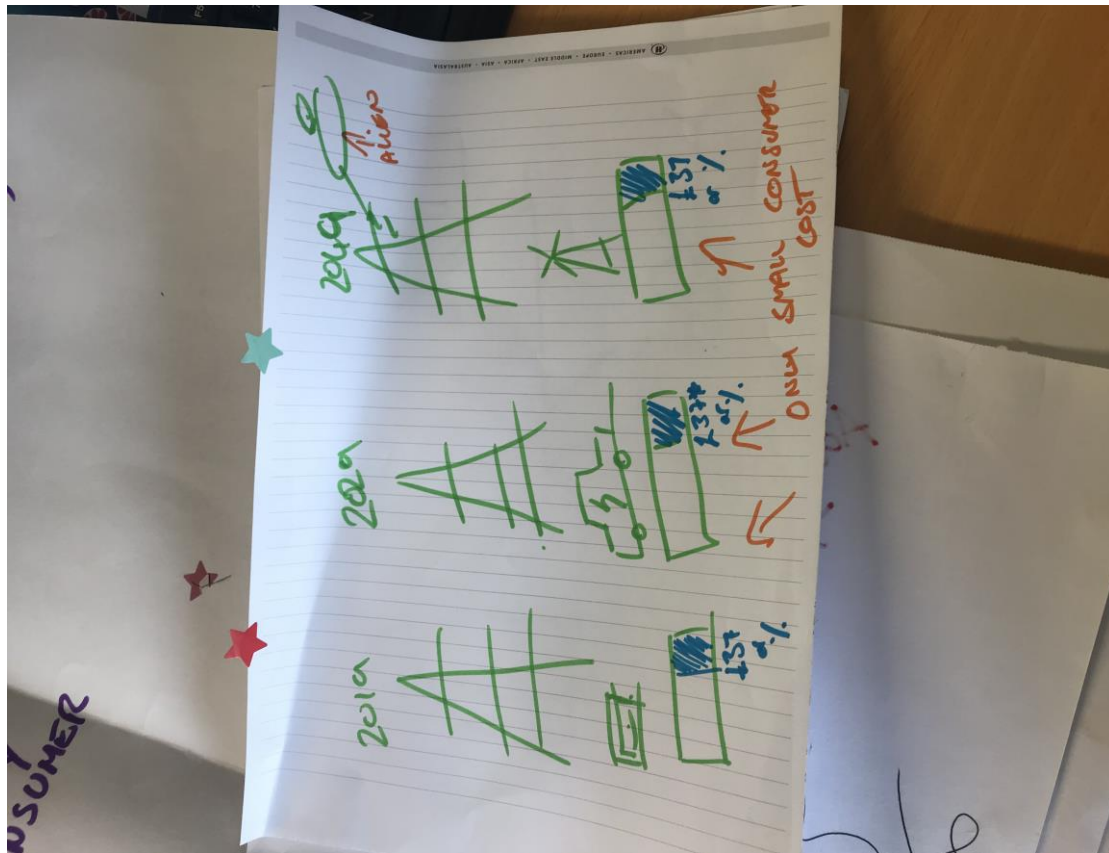
Source: [Ofgem PCFM Nov-18](#)

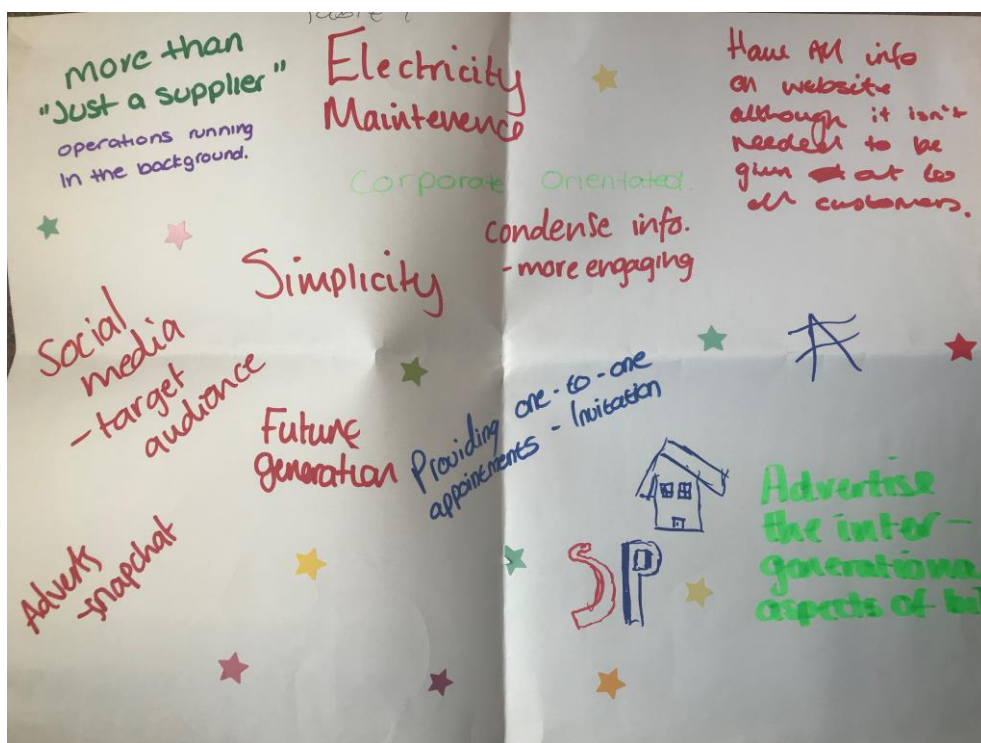
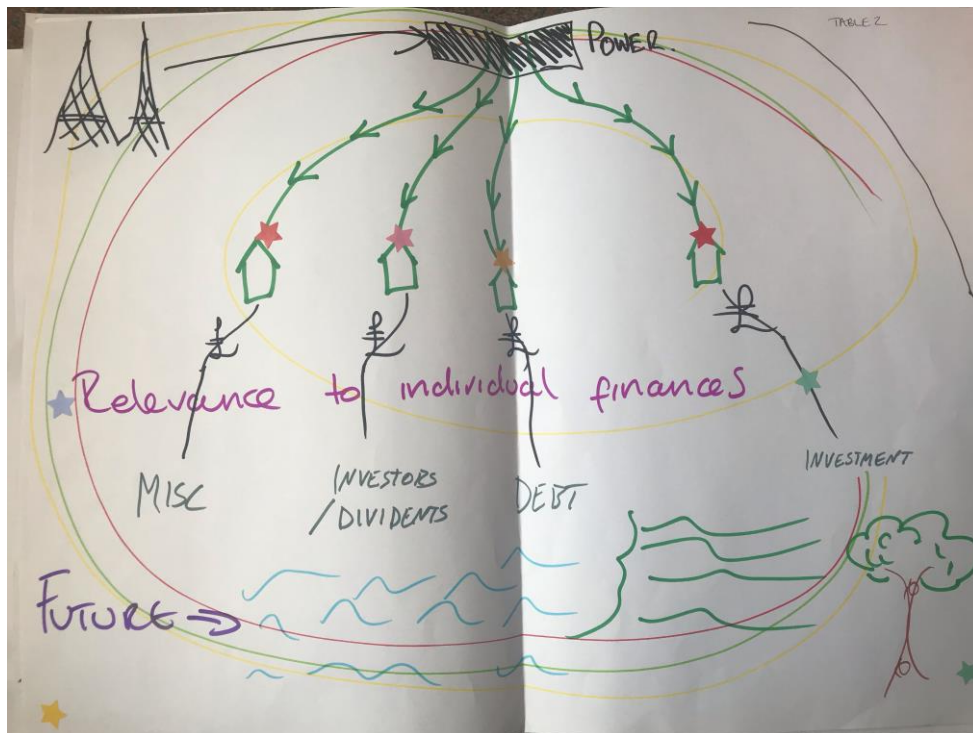
Appendix 4 – Finances breakdown handout

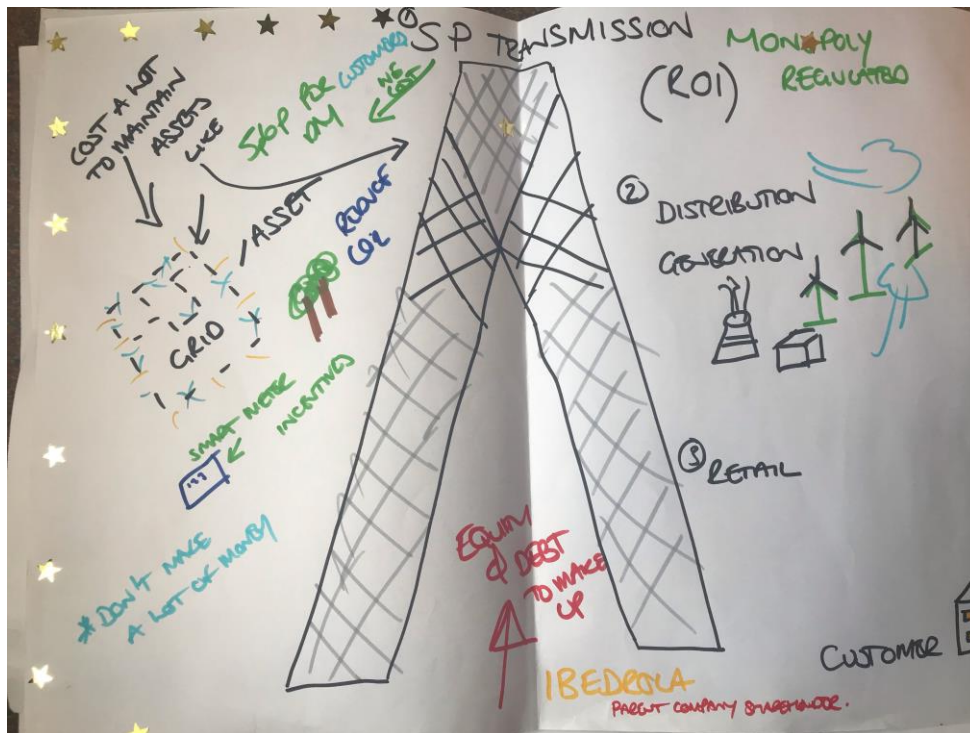


Appendix 5 – Group posters









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t: 0191 261 5261
f: 0191 232 0637

explainresearch.co.uk
info@explainresearch.co.uk

Registered Office:
Explain Market Research Ltd 48 Leazes Park Road, Newcastle Upon Tyne, NE1 4PG
Company Reg No: 2880683 Vat Reg No: 621286654 (England & Wales)