



Commission for Energy Regulation

An Coimisiún um Rialáil Fuinnimh

February 2016 Customer Switching Report for the Electricity and Gas Retail Markets

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| QUERIES TO: | Gina Kelly gkelly@cer.ie |

The Commission for Energy Regulation,

The Exchange,

Belgard Square North,

Tallaght,

Dublin 24.

www.cer.ie

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Overview

This report presents information on the number of customers switching supplier between December 2015 and January 2016 in the electricity and gas retail markets.

This report is an update to the report released on the 3rd of February 2016 and provides switching data for January 2016. The report shows that for the month of January switching increased compared to December 2015.

The report covers customer gains, customer losses and the net switching rate for all suppliers with a market share of greater than 1% for domestic and business customer switches completed in a given month. All data excludes new registrations as they do not involve a switch from one supplier to another.

In the electricity sector, Electric Ireland and SSE Airtricity lost customers from the end of 2015 to the start of 2016, while Energia, Bord Gáis Energy PrePayPower, and Pinergy gained customers overall.

In the gas sector, Electric Ireland, SSE Airtricity and Gazprom lost customers in 2016, while Bord Gáis Energy, Energia and Flogas gained customers overall.

Target Audience:

Electricity Suppliers, Electricity and Gas Customers, Potential New Entrants.

Purpose of this Paper

The purpose of this paper is to report the level of switching in both the electricity and gas retail markets. This data is used internally by the CER in its ongoing retail market monitoring activities and should be of interest not only to electricity and gas customers and suppliers but also those considering entering the gas and electricity retail markets.

This report compliments the more detailed retail market reports published by the CER; such as the CER's quarterly and annual retail reports (see [here](#)). This switching report will be published monthly.

For further information on this report, please contact Gina Kelly gkelly@cer.ie

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1 Customer Switching in the Electricity Retail Markets

This section provides monthly data for the electricity retail markets. The report covers switching from December 2015 to January 2016 and includes;

- Total completed switches
- Suppliers’ net switching position (this shows whether or not a supplier is winning more customers than it is losing in a given month)
- The number of customers switching to each supplier
- The number of customers moving away from each supplier

The data includes all switches completed by domestic and business customers. The data excludes new registrations as these customers have not switched from one supplier to another.

Where data is presented per supplier, only suppliers with a 1 % market share (on a consumption basis) or greater are presented – based on data from the most recent retail quarterly report.

1.1 Completed Electricity Switches per Month

Figure 1 details the total number of completed electricity switches in each month from January 2010 to January 2016.

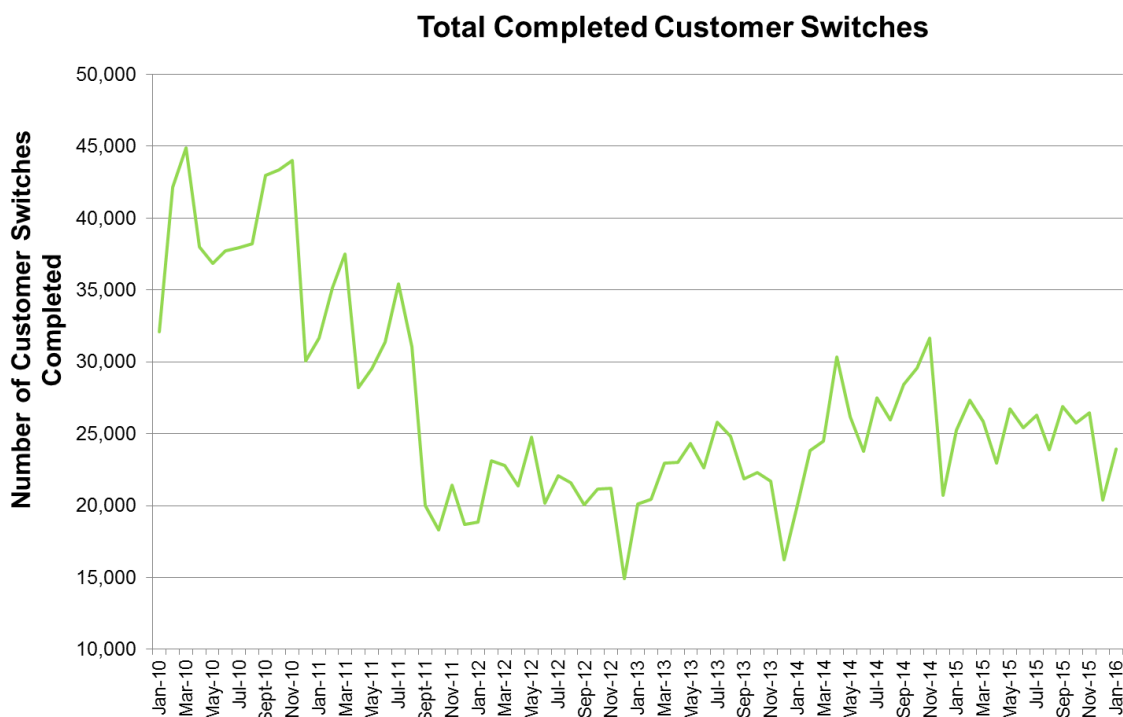


Figure 1. The total number of electricity customer switches completed per month from January 2010 to January 2016.

Figure 1 shows that for 2015, the highest number of switches occurred in February, with 27,347 switches in total. The average number of switches for 2014 was 26,040 while the average number of switches for 2015 was 25,226. There were 23,925 switches in January 2016, increasing from 20,379 in December 2015.

1.2 Suppliers' Net Switching Position

Figures 2 and 3 present the net monthly switching positions per supplier. This net switching data considers the number of customers that have moved to and from each supplier and show a net position (if a supplier has lost more customers than it has gained than their net position will be a loss of customers and a negative figure will be presented and *vice versa*).

Figure 2 presents this data from January 2010 to January 2016 while figure 3 presents the last 12 months of available data (January 2015 to January 2016).

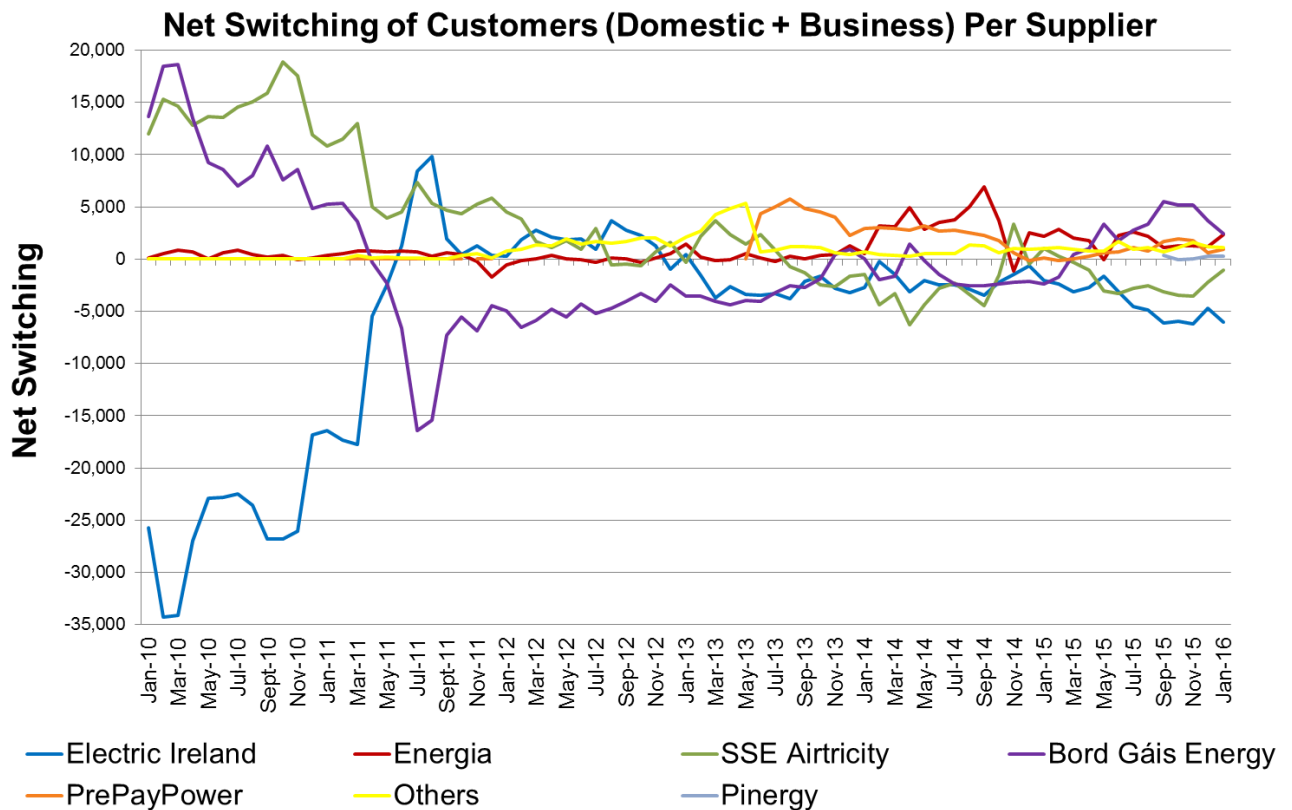


Figure 2. The net switching position of each electricity supplier from January 2010 to January 2016, for domestic and business customers.

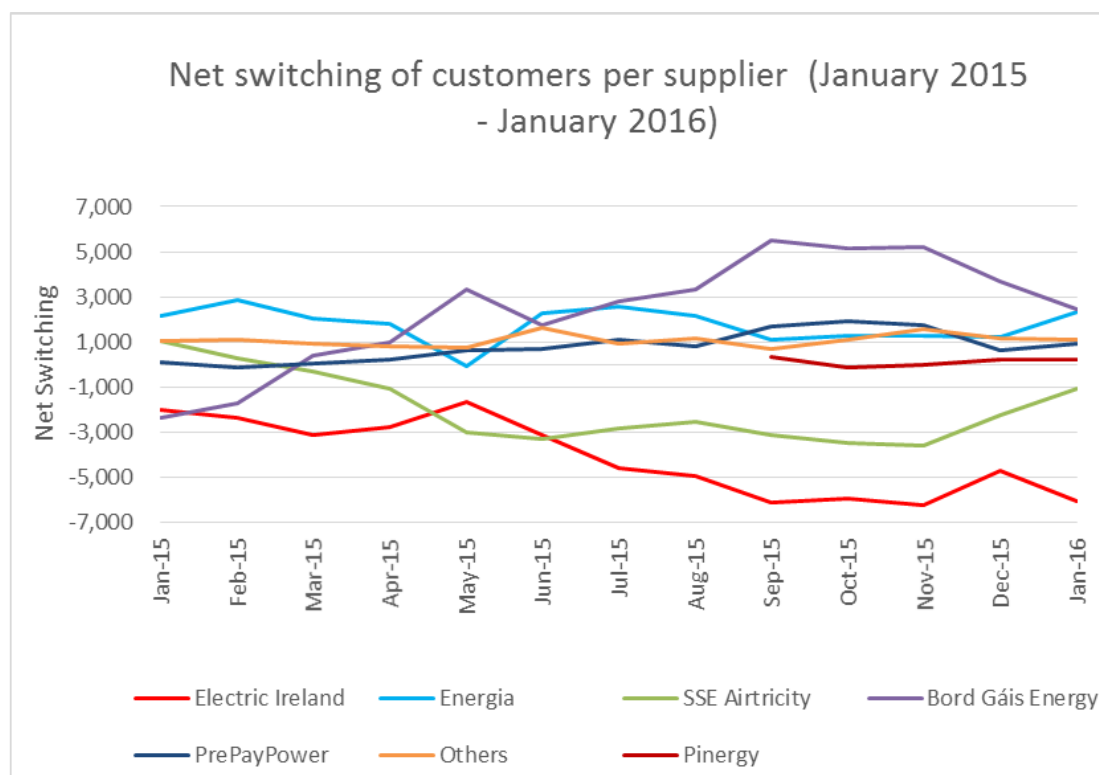


Figure 3. The net switching position of each electricity supplier from January 2015 to January 2016.

Figure 3 indicates that for the second part of 2015 Electric Ireland had a net loss of customers while Bord Gáis Energy had a net gain of customers. The net switching rate for all suppliers for January 2016 is presented below.

| Electric Ireland | Energia | SSE Airtricity | Bord Gáis Energy | PrePayPower | Pinergy | Others |
|------------------|---------|----------------|------------------|-------------|---------|--------|
| -6,051 | 2,334 | -1,059 | 2,468 | 934 | 243 | 1,131 |

Net switching for suppliers, January 2016

In the electricity sector, Electric Ireland and SSE Airtricity lost customers from the end of 2015 to the start of 2016, while Energia, Bord Gáis Energy PrePayPower, and Pinergy gained customers overall.

1.3 Suppliers' Gains and Losses

Table 1 presents the number of customer losses per electricity supplier per month. Table 2 presents the number of customers each electricity supplier has gained per month – recall that this data like all other data in this report does not include new registrations.

Table 1. Monthly customer losses by electricity supplier.

| | Electric Ireland | Energia | SSE Airtricity | Bord Gáis Energy | PrePayPower | Pinergy | Others | Total |
|----------------|-------------------------|----------------|-----------------------|-------------------------|--------------------|----------------|---------------|---------------|
| Jan-14 | 8,406 | 1,151 | 6,323 | 3,727 | 355 | - | 101 | 20,063 |
| Feb-14 | 8,633 | 754 | 8,998 | 5,000 | 348 | - | 80 | 23,813 |
| Mar-14 | 9,395 | 803 | 8,795 | 5,056 | 388 | - | 70 | 24,507 |
| Apr-14 | 11,762 | 925 | 11,426 | 5,772 | 370 | - | 75 | 30,330 |
| May-14 | 10,276 | 944 | 9,231 | 5,232 | 431 | - | 70 | 26,184 |
| Jun-14 | 9,277 | 772 | 8,109 | 4,792 | 674 | - | 138 | 23,762 |
| Jul-14 | 10,789 | 1,037 | 8,814 | 5,862 | 820 | - | 186 | 27,508 |
| Aug-14 | 10,181 | 740 | 8,384 | 5,566 | 948 | - | 158 | 25,977 |
| Sept-14 | 11,047 | 899 | 9,275 | 5,966 | 1,104 | - | 119 | 28,410 |
| Oct-14 | 11,069 | 1,997 | 8,887 | 6,168 | 1,234 | - | 224 | 29,579 |
| Nov-14 | 10,384 | 5,148 | 8,305 | 5,918 | 1,686 | - | 191 | 31,632 |
| Dec-14 | 7,387 | 1,045 | 6,106 | 4,505 | 1,503 | - | 169 | 20,715 |
| Jan-15 | 9,637 | 1,499 | 6,838 | 5,325 | 1,738 | - | 231 | 25,268 |
| Feb-15 | 10,274 | 1,841 | 7,732 | 5,253 | 1,955 | - | 292 | 27,347 |
| Mar-15 | 10,346 | 1,924 | 7,202 | 4,340 | 1,694 | - | 327 | 25,833 |
| Apr-15 | 9,002 | 2,038 | 6,349 | 3,708 | 1,495 | - | 352 | 22,944 |
| May-15 | 9,462 | 4,364 | 7,243 | 3,596 | 1,573 | - | 474 | 26,712 |
| Jun-15 | 9,476 | 3,207 | 7,017 | 3,865 | 1,301 | - | 538 | 25,404 |
| Jul-15 | 10,396 | 2,678 | 7,362 | 3,686 | 1,406 | - | 779 | 26,307 |
| Aug-15 | 9,548 | 2,501 | 6,614 | 3,204 | 1,325 | - | 675 | 23,867 |
| Sep-15 | 10,884 | 3,063 | 7,272 | 3,321 | 1,395 | 952 | 19 | 26,906 |
| Oct-15 | 10,259 | 3,210 | 6,888 | 3,104 | 1,268 | 1000 | 36 | 25,765 |
| Nov-15 | 10,483 | 3,323 | 7,192 | 3,161 | 1,308 | 941 | 47 | 26,455 |
| Dec-15 | 8,312 | 2,581 | 5,344 | 2,372 | 1,172 | 558 | 40 | 20,379 |
| Jan-16 | 10,024 | 2,982 | 5,951 | 3,283 | 1,073 | 541 | 71 | 23,925 |

Table 2. Monthly customer gains by electricity supplier.

| | Electric Ireland | Energia | SSE Airtricity | Bord Gáis Energy | PrePayPower | Pinergy | Others | Total |
|----------------|-------------------------|----------------|-----------------------|-------------------------|--------------------|----------------|---------------|---------------|
| Jan-14 | 5,704 | 1,654 | 4,864 | 3,770 | 3,284 | - | 787 | 20,063 |
| Feb-14 | 8,391 | 3,922 | 4,597 | 3,012 | 3,361 | - | 530 | 23,813 |
| Mar-14 | 7,912 | 3,909 | 5,519 | 3,436 | 3,323 | - | 408 | 24,507 |
| Apr-14 | 8,632 | 5,854 | 5,103 | 7,246 | 3,156 | - | 339 | 30,330 |
| May-14 | 8,236 | 3,825 | 4,860 | 5,066 | 3,596 | - | 601 | 26,184 |
| Jun-14 | 6,793 | 4,246 | 5,298 | 3,358 | 3,378 | - | 689 | 23,762 |
| Jul-14 | 8,314 | 4,803 | 6,533 | 3,513 | 3,608 | - | 737 | 27,508 |
| Aug-14 | 7,290 | 5,742 | 5,022 | 2,977 | 3,460 | - | 1,486 | 25,977 |
| Sept-14 | 7,601 | 7,837 | 4,784 | 3,426 | 3,347 | - | 1,415 | 28,410 |
| Oct-14 | 8,864 | 5,694 | 7,301 | 3,822 | 3,033 | - | 866 | 29,580 |
| Nov-14 | 8,881 | 3,989 | 11,618 | 3,662 | 2,249 | - | 1,233 | 31,632 |
| Dec-14 | 6,709 | 3,595 | 5,597 | 2,334 | 1,382 | - | 1,098 | 20,715 |
| Jan-15 | 7,616 | 3,688 | 7,888 | 2,958 | 1,842 | - | 1,276 | 25,268 |
| Feb-15 | 7,896 | 4,683 | 8,032 | 3,527 | 1,824 | - | 1,385 | 27,347 |
| Mar-15 | 7,225 | 3,966 | 6,914 | 4,768 | 1,732 | - | 1,228 | 25,833 |
| Apr-15 | 6,263 | 3,842 | 5,265 | 4,694 | 1,728 | - | 1,152 | 22,944 |
| May-15 | 7,791 | 4,293 | 4,219 | 6,947 | 2,207 | - | 1,253 | 26,710 |
| Jun-15 | 6,352 | 5,493 | 3,726 | 5,630 | 2,014 | - | 2,191 | 25,406 |
| Jul-15 | 5,810 | 5,240 | 4,541 | 6,471 | 2,538 | - | 1,707 | 26,307 |
| Aug-15 | 4,641 | 4,665 | 4,084 | 6,541 | 2,125 | - | 1,811 | 23,867 |
| Sep-15 | 4,753 | 4,158 | 4,154 | 8,798 | 3,059 | 1,282 | 702 | 26,906 |
| Oct-15 | 4,322 | 4,519 | 3,421 | 8,284 | 3,174 | 901 | 1,144 | 25,765 |
| Nov-15 | 4,252 | 4,594 | 3,601 | 8,356 | 3,080 | 937 | 1,635 | 26,455 |
| Dec-15 | 3,592 | 3,799 | 3,109 | 6,080 | 1,781 | 807 | 1,211 | 20,379 |
| Jan-16 | 3,973 | 5,316 | 4,892 | 5,751 | 2,007 | 784 | 1,202 | 23,925 |

2 Customer Switching in the Gas Retail Markets

This section provides monthly data for the gas retail markets from January 2010 to January 2015 and includes:

- Total completed switches
- Suppliers’ net switching position (shows whether or not a supplier is winning more customers than it is losing in a given month)
- The number of customers switching to each supplier
- The number of customers moving away from each supplier

The data includes all switches completed by domestic and business customers. The presented data excludes new registrations as these customers have not switched from one supplier to another. Where data is presented per supplier, only suppliers with a 1 % market share (on a consumption basis) or greater are presented.

2.1 Completed Gas Switches per Month

Figure 4 details the total number of completed switches in each month from January 2010 to January 2016.

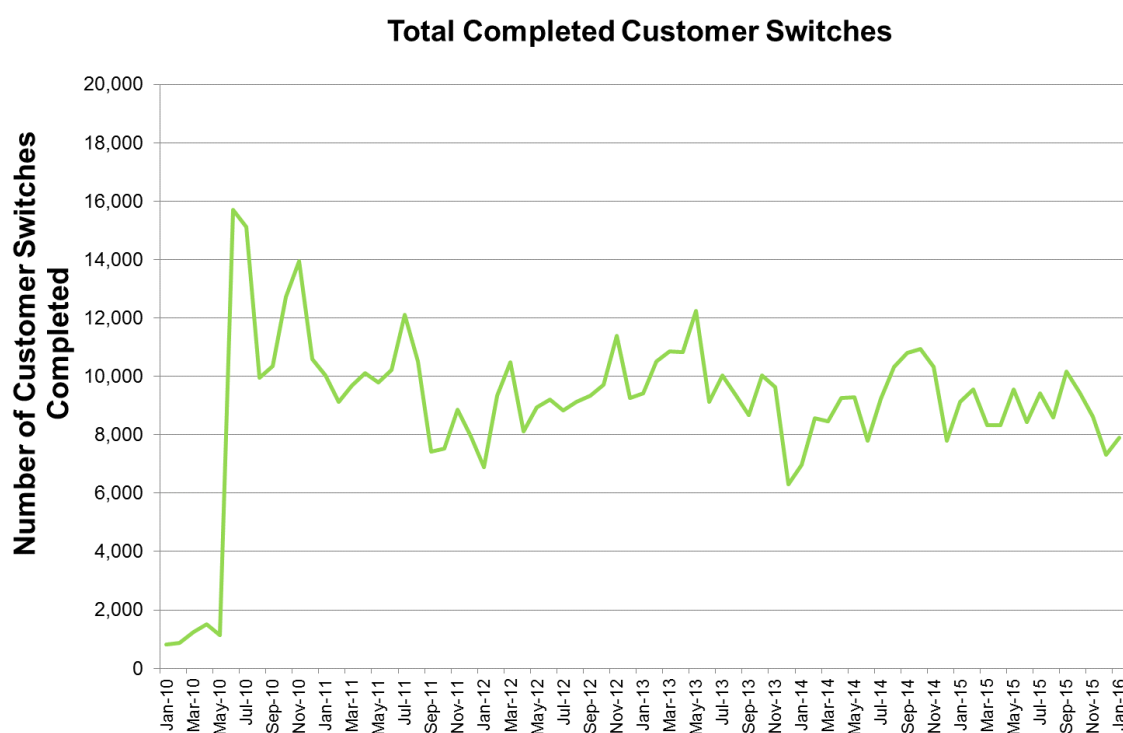


Figure 4. The total number of gas customer switches completed per month from January 2010 to January 2016.

The average number of switches per month between January 2010 and January 2015 was 9,032 with an average of 8,828 switches per month between January 2015 and January 2016. The highest rate of switching in 2015 was between September

and October, with 10,174 switches, as shown in Figure 4. There were a total of 7,314 switches in December 2015 and 7,900 in January 2016.

2.2 Suppliers' Net Switching Position

Figures 5 and 6 present the net monthly switching positions per gas supplier. These net switching data consider the number of customers that have moved to and from each supplier and present a net position (if a supplier has lost more customers than it has gained than their net position will be a loss of customers and a negative figure will be presented and *vice versa*). Figure 5 presents these data from January 2010 to January 2016 while figure 6 presents the last 12 months of available data (January 2015 to January 2016).

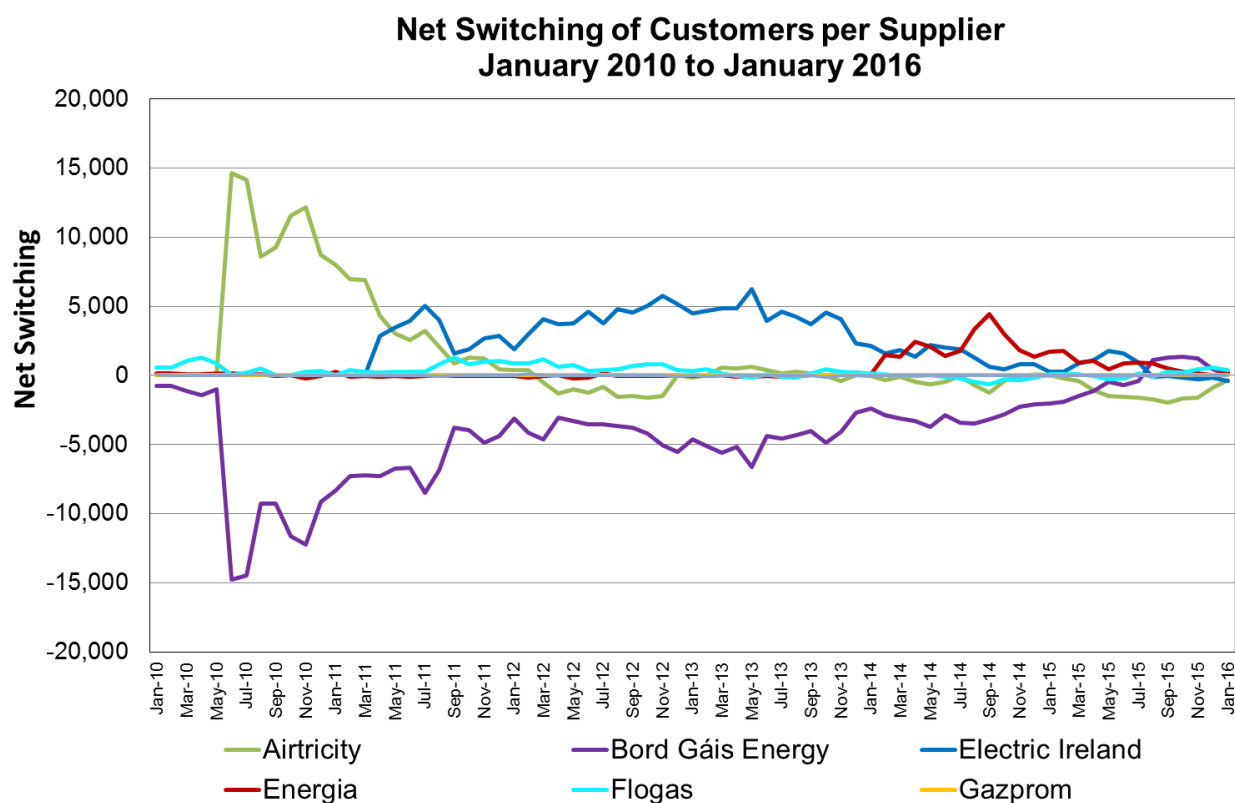


Figure 5. The net switching position of each gas supplier from January 2010 to January 2016, for domestic and business customers.

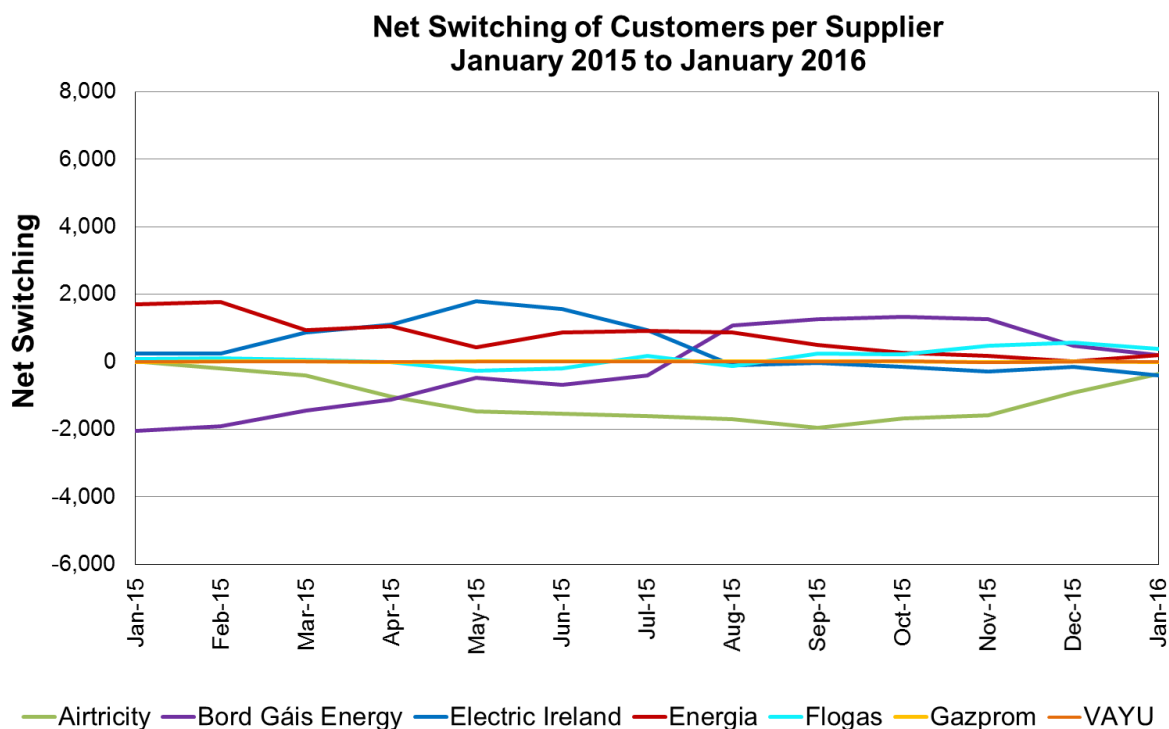


Figure 6. The net switching position of each gas supplier from January 2015 to January 2016.

| Airtricity | Bord Gáis Energy | Electric Ireland | Energia | Flogas | Gazprom | VAYU |
|------------|------------------|------------------|---------|--------|---------|------|
| -358 | 197 | -408 | 193 | 378 | -2 | 0 |

Net switching for suppliers, January 2016

In the gas sector, Electric Ireland, SSE Airtricity and Gazprom lost customers in January 2016, while Bord Gáis Energy, Energia and Flogas gained customers overall.

2.3 Suppliers' Gains and Losses

Table 3 presents the number of customer losses per gas supplier per month. Table 4 presents the number of customers each gas supplier has gained per month – recall that these data like all other data in this report do not include new registrations.

Table 3. Monthly customer losses by gas supplier.

| | Airtricity | Bord Gáis Energy | Electric Ireland | Energia | Flogas | Gazprom | VAYU | Total |
|----------------|-------------------|-------------------------|-------------------------|----------------|---------------|----------------|-------------|--------------|
| Jan-14 | 1,776 | 3,027 | 1,393 | 57 | 724 | - | 2 | 6,979 |
| Feb-14 | 2,215 | 3,574 | 1,830 | 79 | 863 | - | - | 8,561 |
| Mar-14 | 2,174 | 3,736 | 1,679 | 56 | 810 | - | 2 | 8,457 |
| Apr-14 | 2,435 | 3,905 | 1,853 | 117 | 947 | - | 3 | 9,260 |
| May-14 | 2,460 | 4,319 | 1,614 | 81 | 810 | - | 2 | 9,286 |
| Jun-14 | 1,991 | 3,516 | 1,407 | 96 | 723 | - | 51 | 7,784 |
| Jul-14 | 2,245 | 4,145 | 1,892 | 101 | 845 | - | 3 | 9,231 |
| Aug-14 | 2,660 | 4,319 | 2,314 | 110 | 925 | - | 5 | 10,333 |
| Sept-14 | 2,860 | 4,324 | 2,412 | 113 | 1,090 | - | - | 10,799 |
| Oct-14 | 2,584 | 4,308 | 2,793 | 171 | 1,032 | 2 | 46 | 10,936 |
| Nov-14 | 2,421 | 4,109 | 2,518 | 245 | 1,041 | - | 2 | 10,336 |
| Dec-14 | 1,731 | 3,245 | 1,864 | 138 | 806 | - | 4 | 7,788 |
| Jan-15 | 2,155 | 3,419 | 2,385 | 216 | 934 | 5 | 1 | 9,115 |
| Feb-15 | 2,316 | 3,410 | 2,460 | 355 | 1,000 | - | 1 | 9,542 |
| Mar-15 | 2,153 | 2,983 | 1,930 | 455 | 801 | - | 1 | 8,323 |
| Apr-15 | 2,416 | 2,828 | 1,785 | 523 | 759 | 1 | 2 | 8,314 |
| May-15 | 2,602 | 3,046 | 1,924 | 775 | 1,161 | - | 53 | 9,561 |
| Jun-15 | 2,447 | 2,860 | 1,693 | 596 | 834 | - | 2 | 8,432 |
| Jul-15 | 2,628 | 3,011 | 2,101 | 843 | 830 | - | 2 | 9,415 |
| Aug-15 | 2,522 | 2,101 | 2,229 | 902 | 847 | - | 1 | 8,602 |
| Sep-15 | 2,812 | 2,582 | 2,440 | 1,424 | 906 | - | 10 | 10,174 |
| Oct-15 | 2,588 | 2,225 | 2,259 | 1,364 | 944 | - | 60 | 9,440 |
| Nov-15 | 2,364 | 2,025 | 2,091 | 1,302 | 817 | 1 | 30 | 8,630 |
| Dec-15 | 1,875 | 1,878 | 1,741 | 1,139 | 677 | - | 4 | 7,314 |
| Jan-16 | 1,866 | 2,070 | 2,009 | 1,239 | 706 | 2 | 8 | 7,900 |

Table 4. Monthly customer gains by gas supplier.

| | Airtricity | Bord Gáis Energy | Electric Ireland | Energia | Flogas | Gazprom | VAYU | Total |
|----------------|-------------------|-------------------------|-------------------------|----------------|---------------|----------------|-------------|--------------|
| Jan-14 | 1,760 | 646 | 3,540 | 171 | 860 | - | 2 | 6,979 |
| Feb-14 | 1,865 | 721 | 3,452 | 1,567 | 956 | - | - | 8,561 |
| Mar-14 | 2,101 | 645 | 3,535 | 1,426 | 747 | - | 3 | 8,457 |
| Apr-14 | 1,966 | 596 | 3,207 | 2,553 | 934 | 1 | 3 | 9,260 |
| May-14 | 1,837 | 631 | 3,815 | 2,173 | 829 | - | 1 | 9,286 |
| Jun-14 | 1,562 | 646 | 3,402 | 1,502 | 626 | - | 46 | 7,784 |
| Jul-14 | 2,189 | 747 | 3,797 | 1,892 | 604 | - | 2 | 9,231 |
| Aug-14 | 1,954 | 866 | 3,591 | 3,471 | 447 | - | 4 | 10,333 |
| Sept-14 | 1,613 | 1,141 | 3,042 | 4,576 | 426 | - | 1 | 10,799 |
| Oct-14 | 2,212 | 1,491 | 3,245 | 3,166 | 782 | - | 40 | 10,936 |
| Nov-14 | 2,397 | 1,837 | 3,337 | 2,054 | 709 | - | 2 | 10,336 |
| Dec-14 | 1,831 | 1,130 | 2,687 | 1,500 | 637 | - | 3 | 7,788 |
| Jan-15 | 2,170 | 1,368 | 2,636 | 1,917 | 1,022 | - | 2 | 9,115 |
| Feb-15 | 2,122 | 1,490 | 2,711 | 2,117 | 1,101 | - | 1 | 9,542 |
| Mar-15 | 1,740 | 1,528 | 2,800 | 1,388 | 864 | - | 3 | 8,323 |
| Apr-15 | 1,385 | 1,711 | 2,889 | 1,575 | 753 | - | 1 | 8,314 |
| May-15 | 1,135 | 2,576 | 3,709 | 1,206 | 891 | - | 44 | 9,561 |
| Jun-15 | 908 | 2,172 | 3,260 | 1,462 | 630 | - | - | 8,432 |
| Jul-15 | 1,024 | 2,604 | 3,045 | 1,748 | 994 | - | - | 9,415 |
| Aug-15 | 815 | 3,188 | 2,113 | 1,762 | 723 | - | 1 | 8,602 |
| Sep-15 | 845 | 3,849 | 2,396 | 1,932 | 1,149 | - | 3 | 10,174 |
| Oct-15 | 898 | 3,566 | 2,102 | 1,627 | 1,158 | - | 89 | 9,440 |
| Nov-15 | 782 | 3,289 | 1,789 | 1,474 | 1,296 | - | - | 8,630 |
| Dec-15 | 970 | 2,352 | 1,585 | 1,158 | 1,242 | - | 7 | 7,314 |
| Jan-16 | 1,508 | 2,267 | 1,601 | 1,432 | 1,084 | - | 8 | 7,900 |