Smart Energy Outlook

March 2015
Survey approach

Bespoke online survey designed to be representative of the GB population and based on a large sample size to allow drill down analysis to subgroup level.

A total of 10,071 sample was achieved.

Fieldwork: 19th – 30th November 2014

Subgroups
As well as age, gender, region, socio-economic group, we have segmented data for ‘potential vulnerable groups’. These are defined as:

- **Pay by prepay meter** (those who pay for their electricity or gas via a prepay meter)
- **Fuel poverty** (those who spend 10% or more of their income on fuel)
- **Low household income** (those who have a household income of less than £13,999)
- **Renters** (those who rent the property in which they reside)
- **Group renters** (those who rent with at least one other adult who is not their partner)
- **Disability in the household which impacts ability to carry out day-to-day activities** (split by physical or mental health condition)
Respondent demographics

Gender

- Female: 51%
- Male: 49%

Age

- 18-24: 29%
- 25-34: 35%
- 35-44: 37%
- 45-54: 22%
- 55-64: 18%
- 65+: 12%

Property type

- Detached: 24%
- Semi: 33%
- Terraced: 22%
- Maisonette/Flats: 19%

Social Grade

- DE: 24%
- C2: 22%
- C1: 28%
- AB: 27%

Nation & Region

- Scotland: 9%
- North East: 4%
- Yorkshire & Humber: 11%
- West Midlands: 9%
- East Midlands: 7%
- East Anglia: 10%
- South West: 9%
- South East: 14%
- London: 13%

Base: All Respondents (10,071)
Respondent demographics

Key Headlines

Just under 1 in 5 of the British population knows what a smart meter is. The majority of this group is interested in having one.

Key benefits of smart meters identified by those who know what a smart meter is are the ability to see the cost of gas and electricity in pounds and pence, and to be able to receive accurate bills.

Those with a smart meter feel more confident that they have accurate bills, that they understand their bills and that they have the information needed to choose the right energy supplier & tariff, than those who do not
How did the survey define knowledge of a smart meter?

1. Installation knowledge:

Correctly knowing that smart meters can only be installed by an energy supplier.

2. Understanding:

Being aware of / believing the following things to be true:

- Smart meters allow you to see in pounds and pence the amount of energy you are using in real time.
- A smart meter in your home means you will receive accurate bills rather than estimated ones from your energy supplier.
18% of the GB population know what a smart meter is. This figure is higher amongst those aged 55+ and those located in the North of England.

Know what a smart meter is

- **18%** Know what a smart meter is
- **82%** Do not know what a smart meter is

Index amongst subgroups

Denotes significant difference @ 95% vs total

Base: All Respondents (10,071) Know what a smart meter is (1,850) Subgroups (501-5416)

*Please note ‘fuel poverty’ is based on those who spend 10% or more of their income on fuel
Most of those who know what a smart meter is are interested in having one

Interest in having a smart meter - among those who know what a smart meter is

- Has one installed already: 10%
- Very interested: 29%
- Fairly interested: 30%
- Neither: 15%
- Not very interested: 7%
- Not at all interested: 7%
- Don't know: 1%

69% are interested or have one installed already
Amongst those who know what a smart meter is, younger audiences have the highest interest

Interest in having a smart meter - among those who know what a smart meter is
Being able to see energy usage in pounds and pence and receiving accurate bills rather than estimated ones are the most appealing features of smart meters

Attribute appeal – among those who know what a smart meter is

- See in **pounds and pence** the energy you are using
- **Receive accurate bills** rather than estimated
- See information on an In Home Display
- Help every household in the country waste less energy
- Installed at no extra cost to every customer who wants one
- Choose to use energy when it's cheapest
- No need for energy company to visit your home to read meter
- Smart meters help create a smarter energy sector
- Easier to choose the right deal for me
- Easier to choose the right energy supplier
- Energy companies will know when you've lost power (e.g. storm)
- Prepay customers can top up via their mobile or online
Those who have a smart meter are more confident in the accuracy of their bills and the information they have available in order to make decisions about energy provider and tariff.

Agreement with statements

<table>
<thead>
<tr>
<th>Statement</th>
<th>Those without a smart meter</th>
<th>Those with a smart meter</th>
</tr>
</thead>
<tbody>
<tr>
<td>I think my energy bill is accurate</td>
<td>57%</td>
<td>76%</td>
</tr>
<tr>
<td>I think I have the information I need to choose the right energy supplier</td>
<td>53%</td>
<td>71%</td>
</tr>
<tr>
<td>I think I have the information I need to choose the right energy tariff</td>
<td>51%</td>
<td>68%</td>
</tr>
<tr>
<td>I understand my energy bills</td>
<td>53%</td>
<td>63%</td>
</tr>
<tr>
<td>I think I pay the right amount for the energy I use</td>
<td>44%</td>
<td>57%</td>
</tr>
<tr>
<td>I trust my energy supplier(s)</td>
<td>36%</td>
<td>43%</td>
</tr>
<tr>
<td>I'm not concerned about running up a big energy bill (without realising it)</td>
<td>29%</td>
<td>33%</td>
</tr>
<tr>
<td>I trust all energy suppliers</td>
<td>8%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Top 2 box scores  

**XX** = Significant uplift @ 95% vs. those without a smart meter

Q10. For each of the statements below please indicate the extent to which you agree or disagree?
Base: Those with a smart meter n=189, those without a smart meter n=9012