

# Consumer attitudes to the energy market and smart meters



## Smart Meter Central Delivery Body

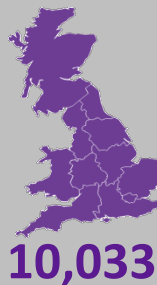
May 2014: Wave 1

# Overview of survey design



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

Data collection between: 31st March - 13th April 2014



A total of 10,033 GB Nat Rep sample was achieved.

18 years+, with quotas on: age, gender, region, SEG to ensure a robust GB representative sample design.

## Sub-groups

As well as age, gender, region, SEG, we have also looked into 'vulnerable groups'. There are defined as:

- Fuel poverty (those who spend 10% or more of their income on fuel)
- Has a disability
- Renters (as in those who rent the property in which they reside)
- Pay by Pre-pay meter (all those who pay their electricity or gas via a pre-pay meter)

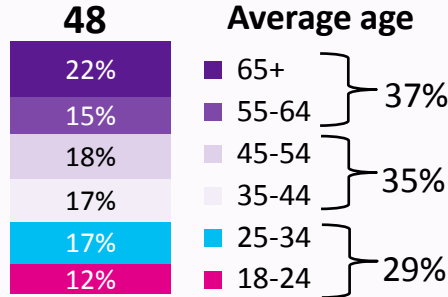


# Respondent Profile

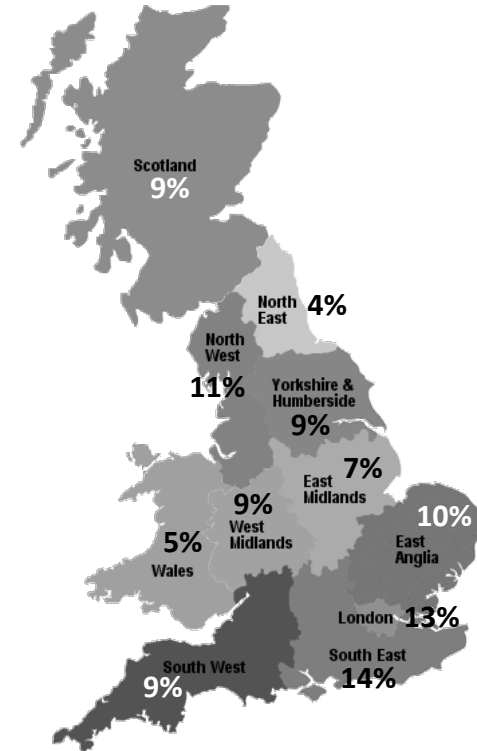
## Gender



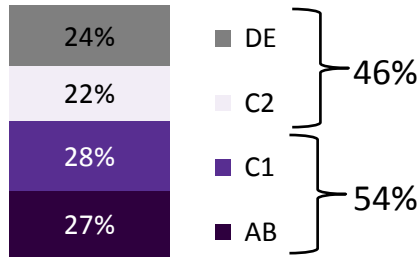
## Age



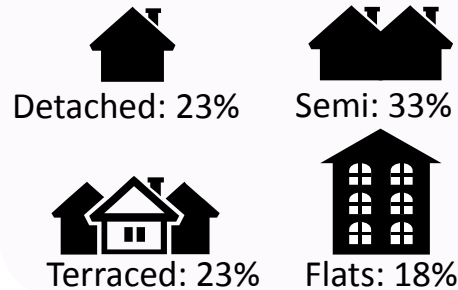
## Region



## Social Grade



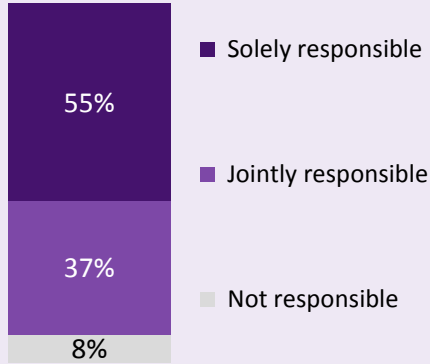
## House Type



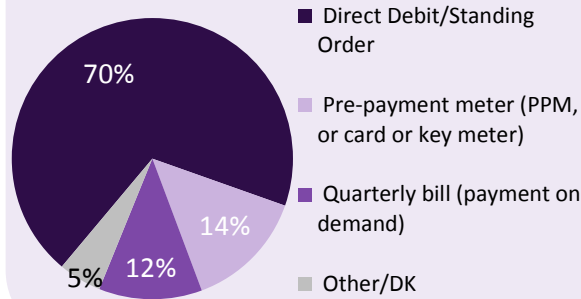
Q1. Gender Q2. Age Q5. Region Q24. Which type of property do you live in? Q36. Social class  
Base: All Respondents (10,033)

# Respondent Profile

## Billing Responsibility

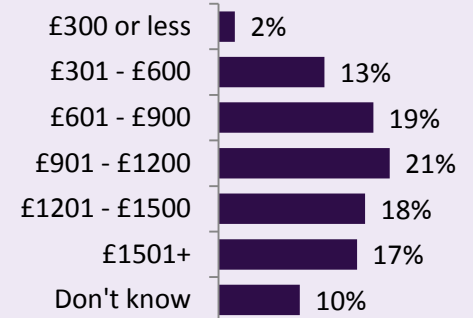


## Billing Payment Method

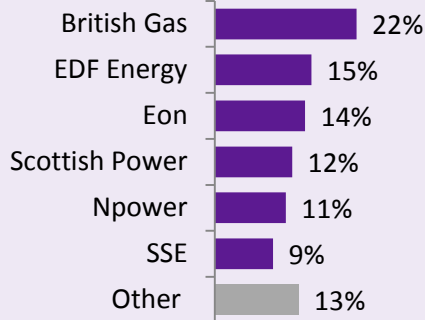


## Annual Bill Size (electricity/gas)

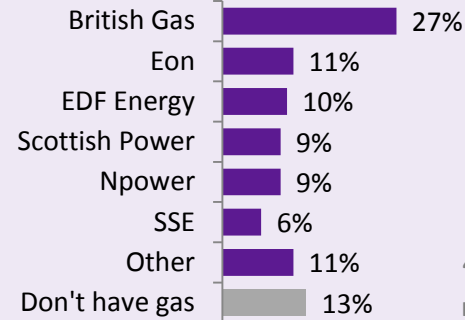
**Average: £1,100**



## Electricity Provider



## Mains gas supplier



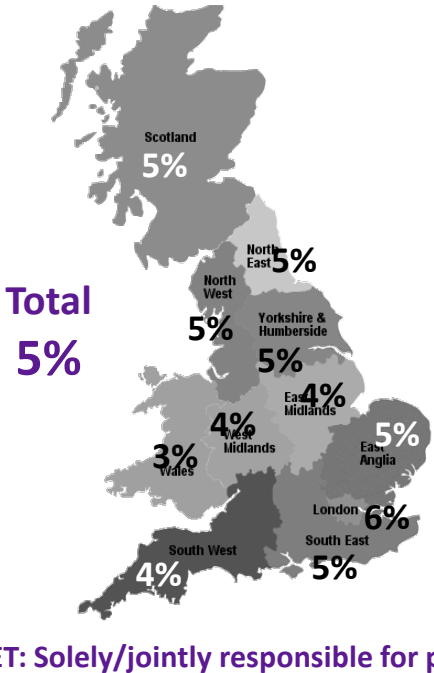
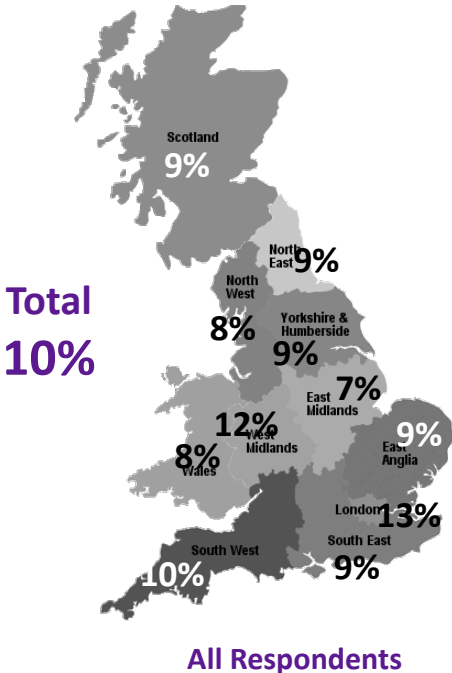
'other' contains any mentions below 5%



Q6: Bill responsibility. Q7 Payment method. Q7a+b estimated annual energy (electricity/main gas) spend. Q8a. Which company supplies electricity to your home? Q8b. Which company supplies mains gas (if you have it) to your home? Base: All Respondents (10,033)

# A slightly higher percentage of people in London do not know their annual energy spend

Percentage of those who do not know their energy spend

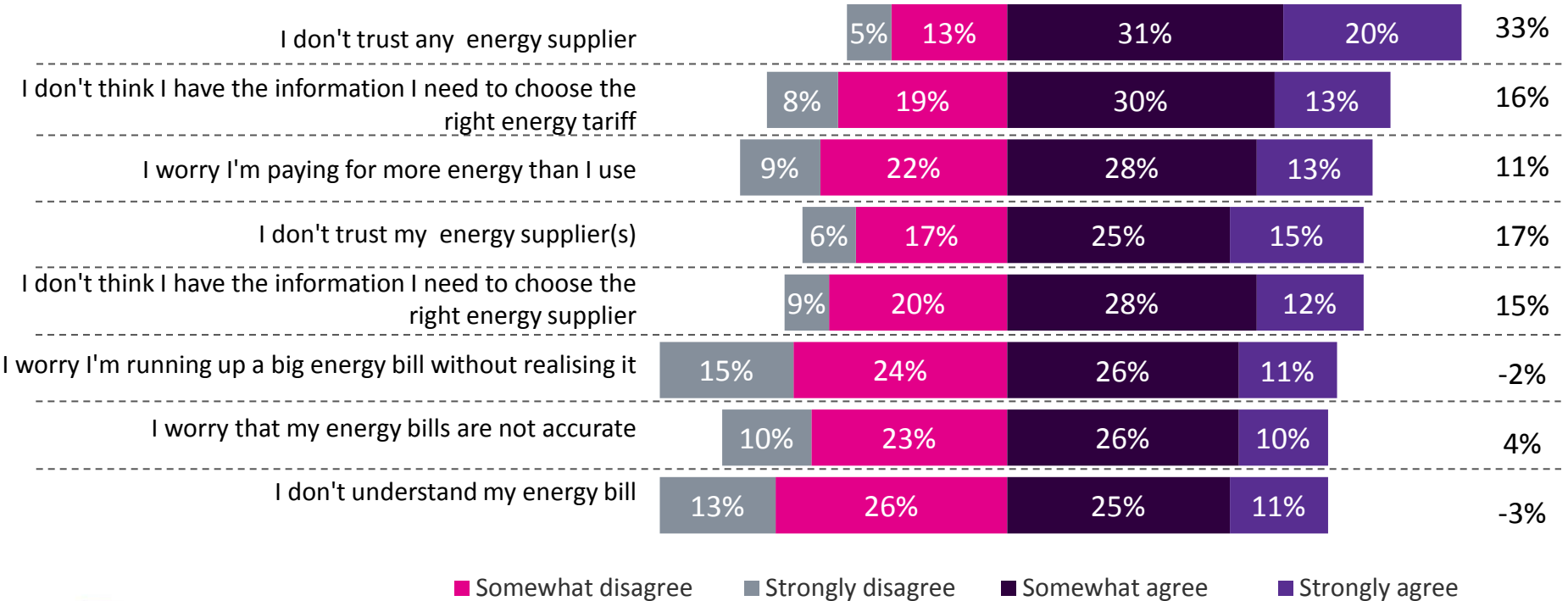


Q7a+b estimated annual energy (electricity/main gas) spend.  
 Base: All Respondents (10,033) All Respondents solely or jointly responsible for paying bill (9,240)

# There is a general lack of trust towards energy suppliers.

## Agreement with statements

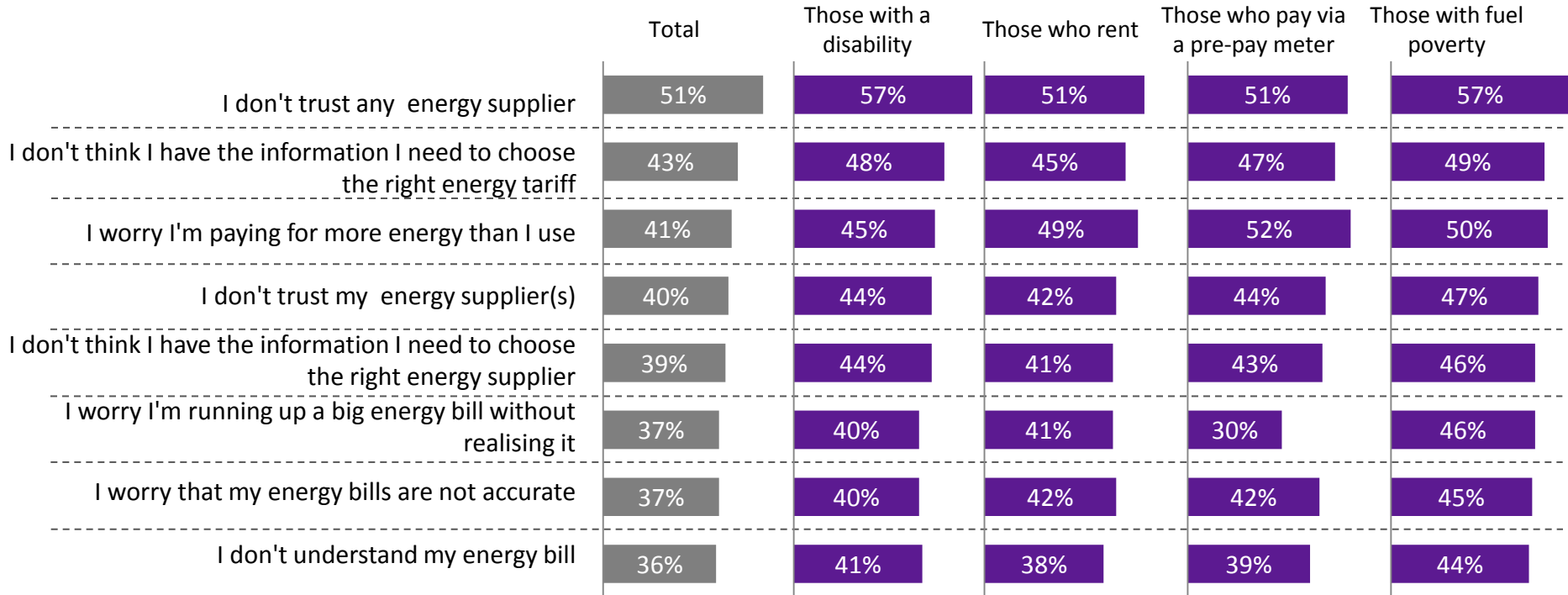
Net difference



Q10 For each of the statements below please indicate the extent to which you agree or disagree?  
 Base: All Respondents (10,033)

# General lack of trust and concerns are even higher amongst vulnerable groups.

## Agreement with statements (Top 2 Box): Total versus vulnerable groups



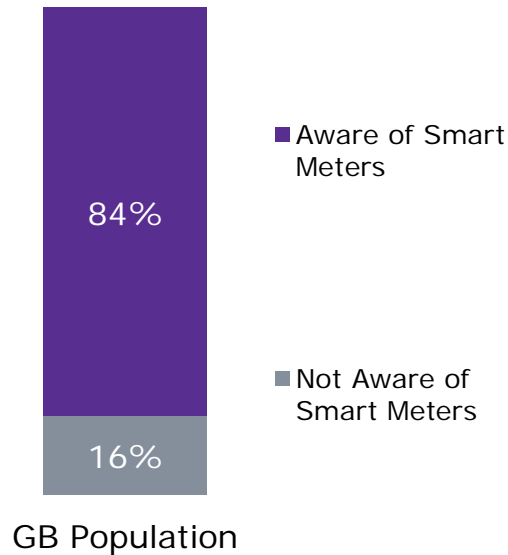
Q10 For each of the statements below please indicate the extent to which you agree or disagree?

Base: All Respondents. Those with a disability (1366) Renters (3555) Those who pay by pre-pay meter (1443) Those who have fuel poverty (831)

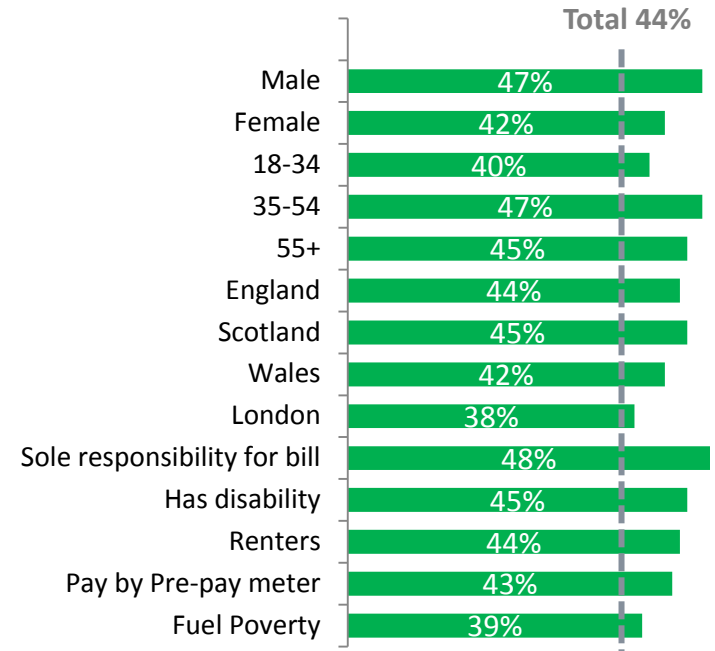
# 84% of people aware and 44% interested in having a smart meter

## Claimed awareness of Smart Meters

**84%** are aware of Smart Meters



## Top 2 Box Interest in having a Smart Meter (Sub groups)



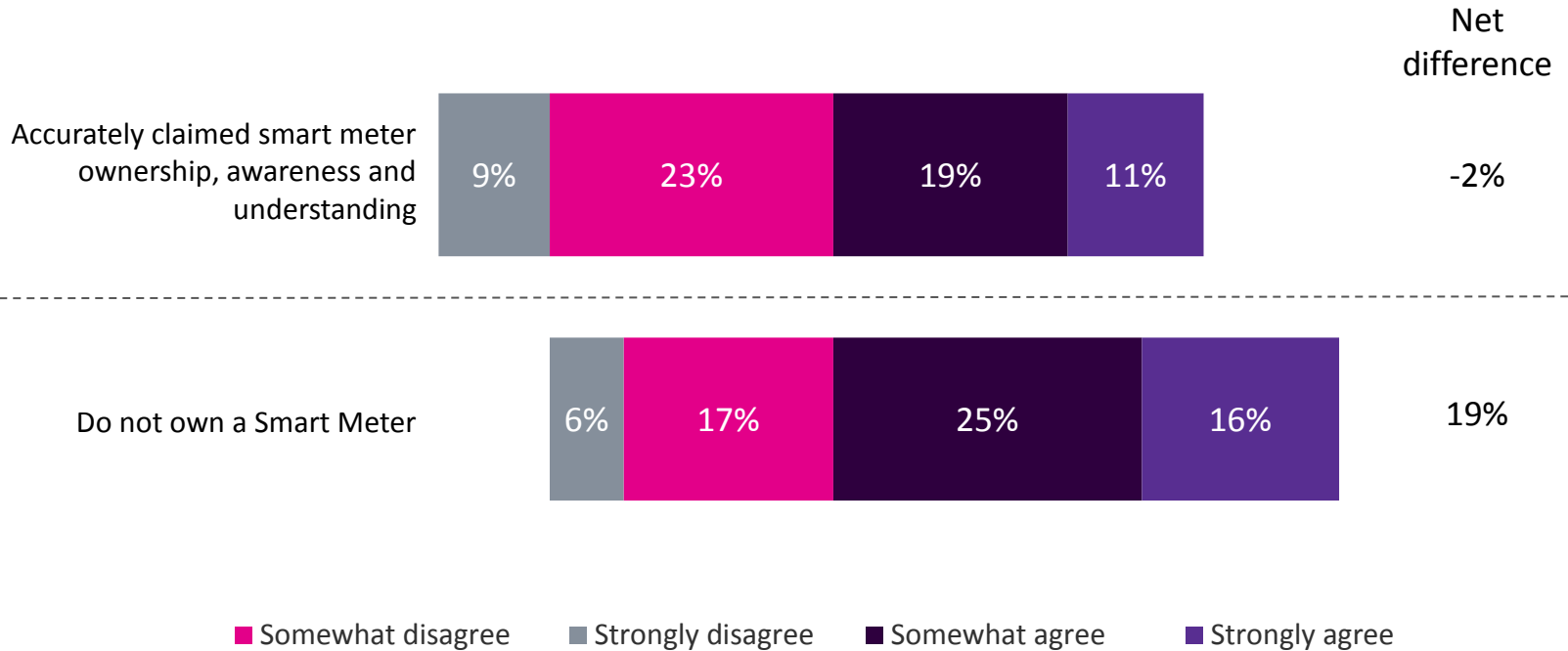
Q 11: Smart Meters monitor energy consumption in the home. Before today had you heard of Smart Meters? Q12. Do you have a Smart Meter?  
Base: All Respondents (10,033)

Q15. To what extent would you be interested, or not, in having a Smart Meter installed in your home?  
Base: All Respondents (10,033)



# On balance those respondents with a Smart Meter trust their energy supplier.

Agreement with statement 'I don't trust my energy supplier(s)'



Q10 For each of the statements below please indicate the extent to which you agree or disagree?

Base: All those who have awareness and understanding and accurately claimed to own a smart meter (90) All those who do not own a Smart Meter (7474)