Department of Energy & Climate Change

Quantitative Research into Public Awareness, Attitudes, and Experience of Smart Meters: Wave 4

Summary of key findings

Research conducted by Ipsos MORI for DECC

February 2014

This document is also available from our website at www.gov.uk/decc.

Quantitative Research into Public Awareness, Attitudes, and Experience of Smart Meters (Wave 4)

Background to the research

Smart meters are the next generation of gas and electricity meters and they can offer a range of intelligent functions. Consumers will have near real time information on their energy consumption to help them control and manage their energy use, save money and reduce emissions. Smart meters are also expected to provide consumers with more accurate information and bring an end to estimated billing. Domestic customers will be offered an In-Home Display (IHD) enabling them to see what energy they are using and how much it is costing to put them in control and avoid wasting energy and money. The smart metering programme aims to install smart meters in all homes in Britain by the end of 2020.

DECC commissioned Ipsos MORI to undertake research to measure the public's views on smart meters and IHDs. The overall objective of this project is to understand consumer awareness, understanding of and attitudes towards smart meters and to see how these are changing over time. The study comprised a series of four biannual nationally representative surveys, conducted face-to-face in homes across Great Britain.

The four waves of the survey were undertaken in April and October 2012 and April/May and September/October 2013. Each wave was based on in-home, face-to-face interviews with adults who were at least jointly responsible for paying their household energy bills. Sample sizes across waves ranged between 2,150 and 2,400, with data weighted to provide nationally and regionally representative results.

This summary note presents the headline findings from the fourth wave, including comparisons with the previous wave of the survey. Please refer to the Excel tables for a full comparison of Wave 4 findings with the previous three waves.

Sub-group differences have not been reported for Wave 4 but remain broadly consistent with those found for Waves 1 – 3.[1]Full underlying data from all four waves of the survey, including demographic and other grouping variables, will be published later this year.

This report only highlights differences between survey waves where the difference between the findings is statistically significant, taking account of their confidence intervals. Any differences quoted within this report are significant at the 95% confidence level. For further information please see the technical note accompanying this publication.

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[1] Findings from Wave 1 – 3 are available on the www.gov.uk website:
Wave 1: https://www.gov.uk/government/publications/smart-meter-research
Wave 2: https://www.gov.uk/government/publications/quantitative-research-into-public-awareness-attitudes-and-experience-of-smart-meters-wave-2-of-3
Wave 3: https://www.gov.uk/government/publications/quantitative-research-into-public-awareness-attitudes-and-experience-of-smart-meters-wave-3

Summary of key findings

Findings from Wave 4 of the survey are broadly consistent with findings from Waves 1 – 3.

Awareness and attitudes towards smart meters

- In Wave 4, three in five bill-payers (60%) reported to be aware of smart meters; this was consistent with Wave 3.

- Around one in ten (9%) reported to have a smart meter installed in their home (also consistent with Wave 3). However, as with previous waves, this is thought to be an overestimate due to confusion about what constitutes a smart meter despite the explanation provided and images shown (previous research has found that smart meters are often confused with IHDs). An adjusted ownership figure of 3% was calculated by applying editing rules which took into account reported experience of smart meters and ownership of IHDs.

- Those who had heard of smart meters were most likely to have found out about them through the media; four in ten mentioned this (41%), a higher proportion than in Wave 3 (35%). This increase may be related to the widespread British Gas advertising campaign about smart meters in the months leading up to Wave 4 fieldwork. One in four heard about smart meters through an energy company (23%) and one in five through word of mouth (20%), both in line with previous waves.

- Among those who were aware of smart meters, knowledge remained consistent, with a quarter (24%) claiming to know either a great deal or a fair amount.

- Support for the roll-out of smart meters was also consistent, with three in ten saying they were supportive (31%). However, opposition (15%) was lower than previous waves (18% in Wave 3), and the proportion saying they had no feelings either way increased (53% compared to 49% in Wave 3).

- As in previous waves, four in ten said they would be interested in having a smart meter installed in their home in the near future (39%).

- Among those who were interested, the most popular reasons given were related to budgeting (57%), avoiding waste (35%) and accuracy of bills (28%). In Wave 4, references to budgeting were significantly higher than in the previous wave (51% in Wave 3) and references to avoiding waste were significantly lower (41% in Wave 3).

- Those who were not interested in having a smart meter installed were most likely to mention a general lack of interest (31%); however, fewer respondents gave this reason than in Wave 3 (41%). References to cost concerns rose in Wave 4 (13% compared to 9% in Wave 3) and other common reasons given included inconvenience (18%) and a lack of knowledge (12%).

- The perceived benefits of smart meters remained broadly consistent with the previous waves; the most frequently mentioned benefits (unprompted) continued to be those related to budgeting (32%), accuracy (17%) and avoiding waste (16%). However, when asked about disadvantages, the proportion mentioning concerns about data security (8%) was lower than in Wave 3 (10%).

Experience of self-reported smart meter customers

- Out of those who reported that they have a smart meter installed in their home (9%), around half were satisfied with arranging the appointment for the engineer to fit their smart meter (50%), as well as the installation process itself (54%), both of which were in line with previous waves.

- Three in five (59%) were satisfied and 6% were dissatisfied with the overall experience of using their smart meter; again broadly consistent with the levels of satisfaction found in previous waves.

Public attitude to in-home displays (IHDs)[2]

- In Wave 4, the proportion of respondents who reported that they have an IHD (13%) was consistent with Wave 3, as was the proportion of respondents with an IHD who look at it at least occasionally (55%).

- As with all three previous waves, almost half of those with an IHD had been offered it by an energy supplier (46%).

- Among those who use their IHD, around seven in ten had used it to monitor the electricity use of appliances (69%). Around two in three thought it would reduce both the amount of electricity used (67%), and the same proportion thought it would reduce the money spent on electricity (67%). One in three said they regularly checked their display on their way in and out of the house (33%). These findings are all consistent with previous waves.

- Out of those without IHDs, the proportion who would be interested in having one installed in their home in the near future remained at the same level as previous waves (38%).

[2] Respondents were asked whether they had an in-home energy display or energy monitor in their home. This includes the type of in-home display installed by energy suppliers, which interacts with a smart meter and also other forms of energy display that are acquired separately as stand-alone devices. Stand-alone devices may have been provided by suppliers or purchased directly. In this report, the term 'IHD' is used to refer to both types of in-home energy display or energy monitor.

Further information needs about smart meters and IHDs

- In Wave 4, the proportion of those who said that they were not interested in further information about smart meters or IHDs increased to one in three (33% compared to 30% in Wave 3), while the proportion of those saying they would be interested in information about the ease of installation fell to 6% (compared to 8% in Wave 3).

- The most common information sources remained internet search engines (39%), energy companies (31%) and the government (9%), including 3% who mentioned DECC.

- As with previous waves, the most trustworthy information sources about smart meters were thought to be energy companies (33%), the government (18%) and Which? consumer magazine (19%), although the proportion mentioning Which? was lower than in Wave 3 (23%).

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