Department for
Energy Security
& Net Zero

Evaluation of the Smart Meter Booking and Installation process

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Chapter 1: Executive summary

Introduction

The Smart Metering Implementation Programme (SMIP) within DESNZ is working with energy suppliers to deliver the smart meter rollout. The programme aims to upgrade 53 million electricity and gas meters to smart meters in households and small businesses across Great Britain. Ensuring that energy suppliers are complying with their installation and consumer protection requirements and are seeking to meet consumer demand are key priorities for the Government. This includes customers being able to easily schedule an appointment and customers having a positive installation experience which is vital to the success of the programme.

This research was commissioned to evaluate the journeys that customers go on in booking and installing a smart meter, to help understand where potential challenges exist preventing customers from getting smart meters installed.

The following research aims were developed to guide this project:

- Collect robust supplier level (domestic and non-domestic) evidence on customers' ability to book an installation and the subsequent completion of those installations
- Gather detailed evidence on the quality of energy suppliers' customer journeys, including how energy suppliers facilitate bookings, the fulfilment of resulting appointments and post-installation support
- Provide evidence to inform future policy development

Methodology

To enable real-time evidence to be captured, the research adopted a mystery shopping, convenience-sampling approach. Domestic customers and small, private sector, businesses in Great Britain without a smart meter were recruited and asked to go through the process of having a smart meter installed, with the research capturing their experiences at four different points in the process.

The research process therefore entailed an initial recruitment stage, followed by four online surveys conducted throughout the process: booking stage, pre-install stage, installation stage and the post-installation stage.

The completed interviews for each stage are detailed below, in Figure 1. A full breakdown of the achieved sample by a variety of demographic and firmographic characteristics is provided in Annex 2: Demographics and Firmographic tables.

Figure 1 Achieved responses by stage among domestic and non-domestic customers

Survey stage	Domestic responses	Non-domestic responses
Booking survey	274	78
Pre-installation survey	153	56
Installation survey	135	48
Post-installation survey	101	35

Domestic customer journey

The most acute challenges typically occur at the booking stage. Over a quarter (27%) of domestic customers that took part in the research were unable to book a smart meter installation, usually because there were no appointment slots available for them. It should be noted that a quarter of these (24%) were informed that smart meter installations were unavailable in their area, an issue customers faced across a range of energy suppliers. Furthermore, a fifth (18%) of domestic customers who successfully booked their smart meter installation reported they encountered problems that would normally have made them give up if they were not participating in the research. Had they done so, the booking success rate would have dropped to 60%.

Once the customer had successfully booked a smart meter install, the rest of the journey appeared to have been more efficient and with fewer hindrances. At the pre-install stage, most customers were contacted beforehand by their energy supplier (69%), and they typically found these communications useful (90%). A small minority (2%) of customers were asked to rearrange their appointment, but none faced cancellations.

There was a similar positive experience at the installation stage for the majority of customers, with 89% successfully having a smart meter installed. Findings relating to the In-Home Display (IHD) were similarly positive, with the vast majority (94%) of customers who had a meter installed being offered an IHD - most (89%) were offered and accepted this IHD, although 5% were offered one and declined it (with 6% not being offered one). Most were offered an IHD demonstration (84%) and found the IHD demonstration easy to understand (85%). Around two fifths (41%) were offered energy saving advice. Regarding overall satisfaction, 78% were ‘satisfied’ with the installation, with 33% ‘completely satisfied’.

Finally, customers have shown a positive response to receiving their smart meter which has led to (self-reported) behaviour changes. Since having their smart meter installed, most customers found it easy to check their energy consumption (92%) and demonstrated a

willingness to change how they use their energy at home (77%). However, a minority (15%) did report issues with their smart meter, roughly half of which were due to the IHD not functioning properly, with the other half relating to issues with the meter. Around half of these had been resolved at the time of the post-install survey (around a month after installation). Ultimately, the majority (86%) were satisfied with their smart meter and would recommend one to a friend or colleague (82%). A similar proportion (85%) were happy with the overall process of having a meter installed.

Non-domestic customer journey

The booking stage proved to be the most challenging aspect of the journey. Nearly three out of ten (29%) non-domestic customers were unable to book an installation. Meanwhile customers reported being offered limited flexibility regarding their appointment times: only a third (35%) were offered a choice of an appointment inside or outside work hours and even fewer (20%) were offered a choice of weekday or weekend appointments. If customers were to be offered more flexibility, it may minimise disruption at this stage in the installation journey.

Non-domestic customers were generally supplied with the information needed in the period leading up to their installation. At the pre-installation stage, the majority (64%) of businesses who successfully booked an installation were contacted between their booking and installation by their energy supplier, with nearly all (94%) of those reporting they found the communications useful. Only 5% of customers were asked to rearrange their appointment to a different time.

Over four fifths were able to get a smart meter successfully installed (83%). Non-domestic customers generally agreed that the process of installation was efficient (89%) and the information they were provided was clear and understandable (79%). Regarding overall satisfaction with the installation process, 74% were satisfied, with 19% being completely satisfied.

For the final stage of the journey, a majority (63%) of businesses had checked or requested their energy usage data, and most demonstrated an improved confidence in understanding their data usage and how they could control their usage in the future (66% feeling more in control of their energy usage and 60% more aware of their energy usage). Only a small minority (14%) reported issues with their meter, with around half of these having been resolved by the time they took the survey, and this usually related to problems checking their data. Most importantly, the majority (74%) were satisfied with their smart meter and would recommend one to a friend or colleague (80%). A similar proportion (80%) was also satisfied with the overall journey of getting their meter installed.

Chapter 2: Background

Context

The Smart Metering Implementation Programme (SMIP) within DESNZ is working with energy suppliers to deliver the smart meter rollout. The programme aims to upgrade 53 million electricity and gas meters to smart meters in households and small businesses across Great Britain. By the end of September 2024 (the latest statistics available at the time of this report) there were 37 million smart and advanced meters operating in homes and small businesses, representing 65% smart coverage.[1]

To meet the Government ambition of ensuring all households and small businesses can benefit from smart meters as soon as possible and to drive completion of the rollout, SMIP introduced a new four-year framework with binding installation targets for energy suppliers, beginning in 2022.[2]

The Government has ensured that appropriate consumer protections have been put in place with regulatory requirements for installation set out in the Consolidated Metering Code of Practice (CoMCoP)[3] and energy supplier licences which cover both domestic and smaller non-domestic consumers. They include the responsibility to offer an In-Home Display (IHD) to all domestic consumers (and to provide free access to energy usage data to non-domestic customers), to demonstrate use of the smart meter and display clearly and accurately, and to provide supporting material, considering any consumer vulnerabilities or specific needs.

In addition to this, energy suppliers must offer energy efficiency information and advice during the installation visit to domestic customers. For microbusinesses, energy efficiency guidance can be offered at any time which is appropriate for their needs, whether this is before, during or after the installation visit.

Ensuring that energy suppliers are complying with their installation and consumer protection requirements and are seeking to meet consumer demand are key priorities for the Government. This includes customers being able to easily schedule an appointment and customers having a positive installation experience which is vital to the success of the programme.

In the non-domestic sector, this may also mean energy suppliers engaging with the complexities of facilitating a non-domestic installation, such as giving businesses advance notice of the need to “power down” their business temporarily for an installation, arranging

[1] https://www.gov.uk/government/collections/smart-meters-statistics
[2] BEIS (2022), *Smart meter policy framework post 2020: minimum annual targets and reporting thresholds for energy suppliers.* Available at: https://www.gov.uk/government/consultations/smart-meter-policy-framework-post-2020-minimum-annual-targets-and-reporting-thresholds-for-energy-suppliers.
[3] https://recportal.co.uk/smis

appointments outside of core business hours and/or ensuring appropriate information reaches the relevant member of staff within the organisation.

Previous research exploring the customer experience of smart meter installation was conducted in 2017/18, focusing on domestic consumers.[4] This latest research provides updated evidence on energy supplier performance, expands the evidence base to non-domestic energy suppliers (who were not included in earlier research in this area), and assesses delivery of the aforementioned policy framework.

Research aims

The following research aims were developed to guide this research:

- Collect robust supplier level (domestic and non-domestic) evidence on customers' ability to book an installation and the subsequent completion of those installations
- Gather detailed evidence on the quality of energy suppliers' customer journeys, including how energy suppliers facilitate bookings, the fulfilment of resulting appointments and post-installation support
- Provide evidence to inform future policy development

A key goal of the research was to capture customers' experiences in real time, to avoid recall issues affecting the quality and robustness of the research.

[4] See: BEIS (2017), *Smart Meter Customer Experience Study 2017*. Available at: https://www.gov.uk/government/publications/smart-meter-customer-experience-study-2016-18; and BEIS (2019), *Mystery shopping of Smart Meter Installations*. Available at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/831814/mystery-shopping-smart-meter-installations.pdf

Chapter 2: Methodology

Overview

To enable near real-time evidence to be captured, the research adopted a mystery shopping, convenience-sampling approach. Domestic and non-domestic consumers in Great Britain without a smart meter were recruited and asked to go through the process of having a smart meter installed, with the research capturing their experiences at four different points in the process.

The research process therefore entailed an initial recruitment stage, followed by four online surveys conducted throughout the process explained in more detail below. Recruitment commenced in August 2023, with the final surveys occurring in February 2024.

This method of research has challenges, which are further explored in Annex 1, most notably a large burden on participants. However, there are several benefits to this approach:

- **Reduced recall bias:** respondents are able to provide their feedback almost immediately after each stage of the journey has taken place, preventing recall bias from affecting their views, as well as being able to ask more granular level details of the journey as the experience was easier to recall.
- **Access to the booking stage**: research into this topic area has often found it difficult to gather data on the booking stage due to respondents limited ability to recall that stage of the journey once they had the smart meter installed, as well as it being difficult to sample those that were unsuccessful in trying to book a smart meter installation through traditional methods such as a post-install survey.
- **Holistic insights across the customer journey:** customers are followed throughout their specific journey, enabling holistic insights across the various stages such as when and how frequently suppliers provide certain information (such as energy saving advice).

Fieldwork

Eligibility

To be eligible for the research, participants had to be based in England, Scotland or Wales, (at least partly) responsible for decisions about energy in their home/at their premises, and not have a smart meter already installed. Participants who had previously attempted to have a smart meter installed but were unable to do so due to technical issues which were yet to be resolved, were also excluded from the research.

Domestic customers were also excluded from the research if:

- Their energy supplier was Shell. Shell had announced plans to sell their domestic retail arm so were less likely to be carrying out new smart meter installs while this sale was completed

Non-domestic customers were excluded from the research if:

- They fell outside of the scope of the non-domestic rollout (either because they operated on a domestic energy tariff or they were large, with either 250+ employees or an annual turnover of more than £25 million).[5]
- They operated in the public sector, as the sample was collected exclusively from business panels.

Survey stages

The research consisted of four short online surveys covering the four different stages of the smart meter installation process, capturing the participant's experience at each stage:

1. **Booking stage:** This stage was conducted straight after participants had made their initial booking of the installation with their energy supplier. This survey explored respondents' experiences during the booking process, including whether they were able to successfully book a smart meter installation. It also captured what information participants were provided with at this stage, and whether energy suppliers were collecting the information they needed to conduct the installation, as well as the variety of appointment slots offered or available.

2. **Pre-installation stage:** The pre-installation stage was conducted a few days before the day of installation. This assessed the communication participants had received from their supplier prior to the installation.

3. **Installation stage:** The installation stage was conducted the day after installation. The survey explored respondents' experience of the installation of their smart meter in their business/home and whether energy suppliers met their requirements during installation. Additionally, for those that were unable to get a meter installed, it captured reasons as to why this was the case.

4. **Post-installation stage:** A final survey was conducted a month after the smart meter installation. This explored consumer engagement with smart meters, their overall satisfaction with their meter, and if they had experienced any issues with their smart meter since installation.

[5] Large electricity supplies (profile class 5-8 and 00 meters) and large gas supplies (consumption over 732 MWh per year) are required by energy supplier licence conditions (regulated by Ofgem) to have Advanced Meter Reading (AMR) meters and therefore fall outside of the smart metering rollout and policy framework. These tend to be larger Industrial and Commercial businesses. Meanwhile the smart metering policy framework applies to smaller non-domestic sites (profile class 1-4 meters and gas consumption below 732 MWh per year). The research used number of employees and turnover to assess business size and approximate the smart meter rollout scope.

Achieved responses

The completed interviews for each stage are detailed below, in Figure 2.1. A full breakdown of the achieved sample by a variety of demographic and firmographic characteristics is provided in Annex 2: Demographics and Firmographic tables.

Figure 2.1 Achieved responses by stage among domestic and non-domestic customers

Survey stage	Domestic responses	Non-domestic responses
Booking survey	274	78
Pre-installation survey	153	56
Installation survey	135	48
Post-installation survey	101	35

Analysis

Separate data tables were produced for each survey stage and customer type. Differences between sub-groups were highlighted if they were statistically significant at the 95 percent confidence level, to support sub-group analysis. These are flagged in this report, although it is important to note that due to the non-probability, convenience based, sampling approach, we cannot be certain these differences are reflective of the wider population. Additionally, some indicative or directional differences have been noted that did not meet the threshold for statistical significance.

Please note that charts will not always sum to 100% due to rounding.

Limitations

There are a handful of limitations to the methodology that should be considered when interpreting the research findings. These include:

- The sample was not selected to be representative of the wider population of domestic and non-domestic energy customers who are trying to get a smart meter installed. This means the findings cannot be generalised to describe the population as a whole.

However, the sample for both domestic and non-domestic consumers is large enough and diverse enough demographically to draw reliable conclusions.

- Participants in this study will be more engaged than regular customers due to the nature of the research. For most questions this is an advantage - it allowed the study to collect reliable data on aspects of the installation that are low salience for most consumers. For questions on engagement with smart metering and potential behaviour change, it may mean participants are less likely to be representative of all consumers.
- The relatively low achieved sample sizes, especially in later stages of the survey, make subgroup analysis more challenging to undertake robustly. Additionally, for bases below 30, data has been presented with numbers (for example, 10 out of 15) rather than percentages. For bases below 10, findings will be presented qualitatively.

It should also be noted that at the latter stages of the journey, there is some survivorship bias that needs to be considered.[6] Customers that were unsuccessful with their installation may not have taken the time to complete the installation survey, knowing that they would be unable to complete the journey. However, to minimise this bias, an incentive was offered in these cases to encourage participation for those who couldn't have a successful install.

[6] Survivorship bias refers to the issue where data is only available on those that have passed or taken on a process, in this case being able to progress through the research stages, meaning that findings could skew in a certain direction as a result.

Domestic Key statistics

- **Three quarters (73%) successfully booked a smart meter installation**
- **Nine in ten (89%) had their smart meter installed**
- **Just over half (54%) rated the booking stage as "good" or above**
- **Four fifths (78%) satisfied with their installation experience**
- **Over four fifths (85%) satisfied with the overall installation process**
- **Over four fifths (86%) satisfied with smart meter itself**
- **Four fifths (82%) would recommend a smart meter**

Chapter 3: Domestic Booking

Sample: 274

This chapter presents findings from the first stage of the customer journey, the domestic booking survey; exploring if customers were able to book a smart meter installation or not, reasons why some customers were unable to book a smart meter installation, availability of appointments, and overall satisfaction with the booking process.

The majority (73%) of domestic customers were able to book a smart meter installation, with most of these (78%) provided with a range of appointment slots and with three fifths (60%) being offered an appointment within 2 weeks from the day of booking. However, 27% who tried to book were unable to, with the most common reasons for this due to energy suppliers being unable to offer an installation at the time (28%) and that installers were not available in the area (24%).

Around a quarter (26%) of domestic customers had experienced problems booking their smart meter installation. The most common problems were no appointment slots being available (58%), and the online booking portal being difficult to use (22%). Additionally, during the booking process, a fifth (21%) of domestic customers reported they encountered problems that would normally have made them give up if they were not participating in the research.

Overall, just over half (54%) reported that they thought the installation booking process was good, a fifth (21%) rated it satisfactory, with a further fifth (20%) rating the booking process as poor.

Booking successes and challenges faced

Just under three quarters (73%) of domestic customers were able to book their smart meter installation, with half (54%) able to book during their initial contact with their energy supplier and a fifth (20%) through further contact. However, just over a quarter (27%) who tried to book a smart meter installation were unable to.

Customers in Wales and Scotland (56%) were less likely than average to be able to book an appointment. There were no statistically significant differences for other subgroups, however there were directional differences for consumers who paid for their energy in different ways:

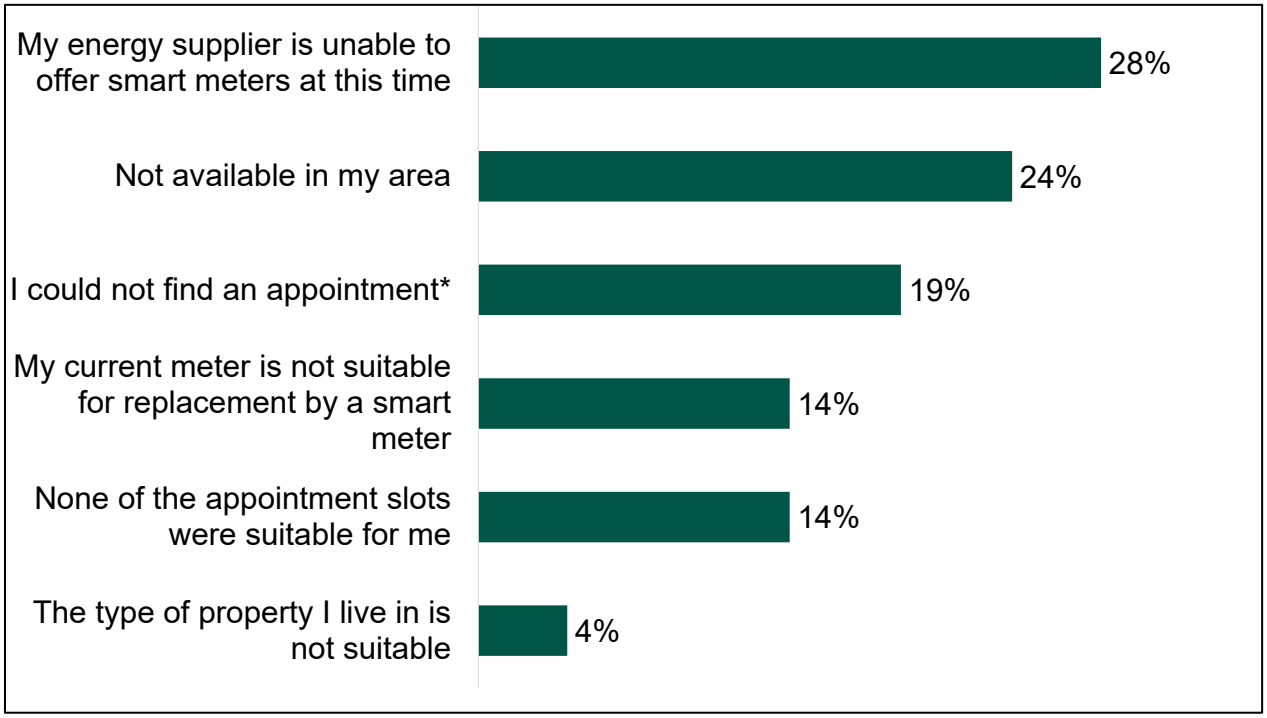
- 72% of customers who used credit to pay successfully booked an appointment (n=242), compared to 84% of customers who paid via prepayment (n=31)
- 73% of homeowners, including those with shared ownership (n=191); 76% renting from a local authority or shared housing association (n=33); 72% renting from a private landlord (n=50) successfully booked appointments

Unsuccessful booking appointments

Of the customers who were unable to book a smart meter installation (27%), reasons given typically related to the availability of installers, as shown in Figure 3.1. Around a quarter reported that their energy supplier was unable to offer smart meters at that time (28%), and that this service was not available in the customer's area (24%). One in five (19%) reported that they could not find an available appointment and were added to the waiting list.[7].

[7] Converting to be of the total sample who tried to book an install (n=274): 8% said that their energy supplier told them they were unable to offer smart meters at this time; 7% that they were told they're currently not available in their area; 5% couldn't find an appointment and were put on a waitlist.

Figure 3.1 Reasons why customers were unsuccessful in booking an appointment



A19. What reasons were you given for you not being able to get a smart meter now? Base (Multicode- chart will not total 100%): All domestic customers who were unable to book a smart meter (74) *Please note that this response was coded from respondent's verbatim responses to this question.

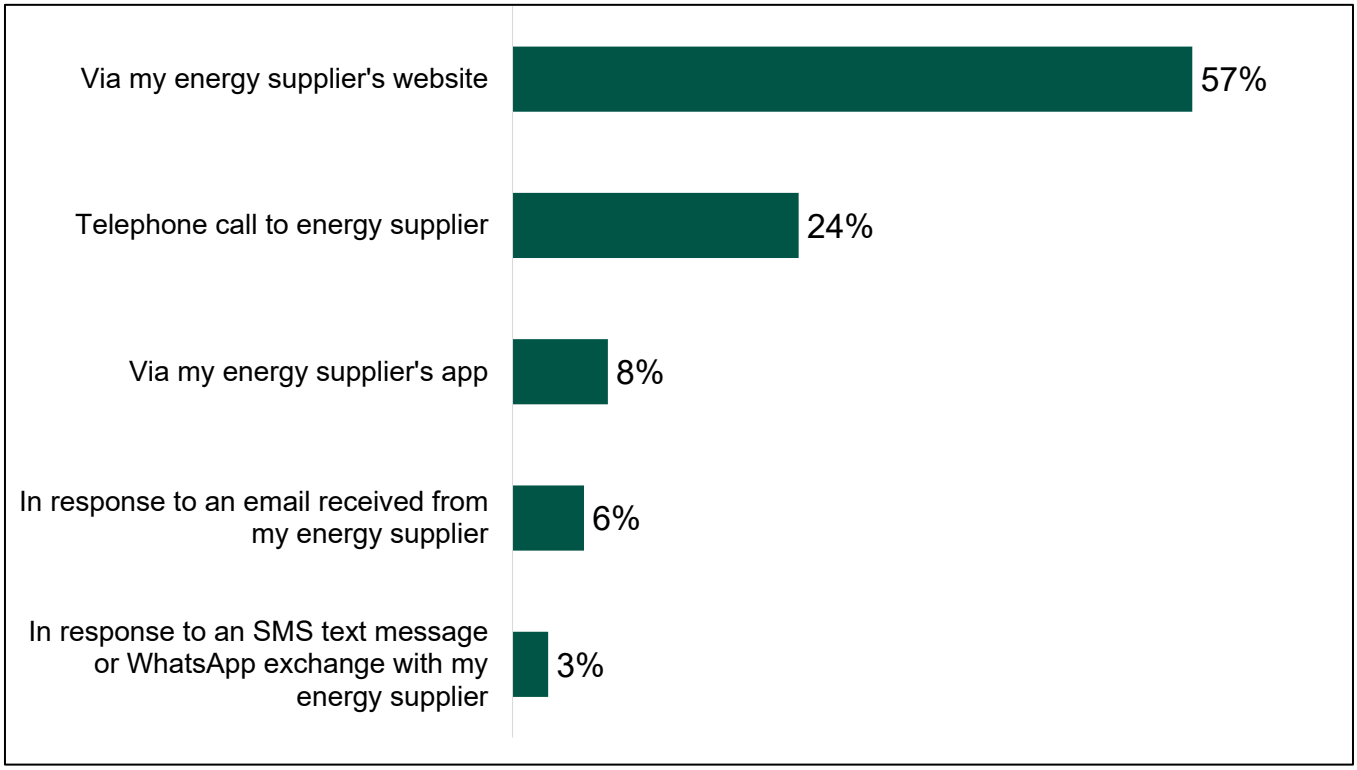
Of those who were unable to book a smart meter installation, only a small minority (5%) were added to a waiting list and informed of the related timeframe. The majority (63%) were added to a waiting list but with no timeframe given, while a third (32%) were not added to a waiting list.

Booking process

As can be seen in Figure 3.2, over half (57%) of customers booked or attempted to book their smart meter installation via their energy supplier's website, followed by a quarter of customers who booked via a telephone call to their energy supplier (24%).

Customers who contacted their energy supplier via the phone to book a smart meter installation were more likely to have successfully booked an appointment (88%, vs 73% average).

Figure 3.2. Channels used to book smart meter installations

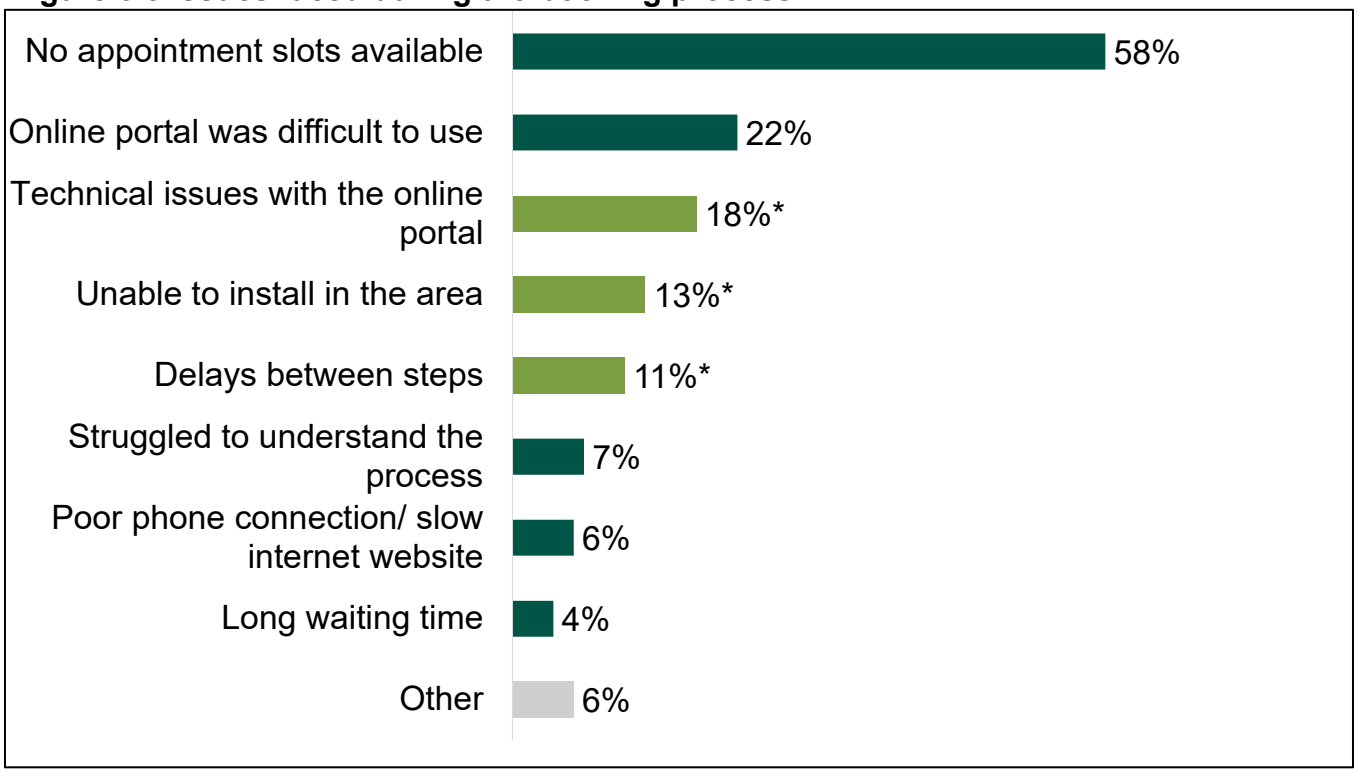


A2. What was the main method you used to book your smart meter? Base: All domestic customers (274)

During the booking process, a quarter (26%) of customers experienced problems whilst attempting to book their installation appointment. When looking at the split, 11% of those who successfully booked encountered problems and 16% of those who were unable to book an appointment experienced problems.

As seen in Figure 3.3, the most common issues faced were there being no appointment slots available (58%), followed by difficulties using the online portal (22%), and technical issues using the online portal (18%).

Figure 3.3 Issues faced during the booking process



A15. What problems did you face whilst booking your smart meter installation? Base (Multicode- chart will not total 100%): All customers who experienced problems during booking their smart meter installation (72). *Response codes with an Asterix are codes that were created from verbatim responses to 'Other'.

Further to this, a fifth (21%) of all customers reported that they encountered problems during their booking process that would normally have made them give up if they were not participating in the research. Of customers who successfully booked, just under a fifth (18%) stated they would have given up had they not been participating in the research. If this group had dropped out, the booking success rate would have fallen from 73% to 60%.

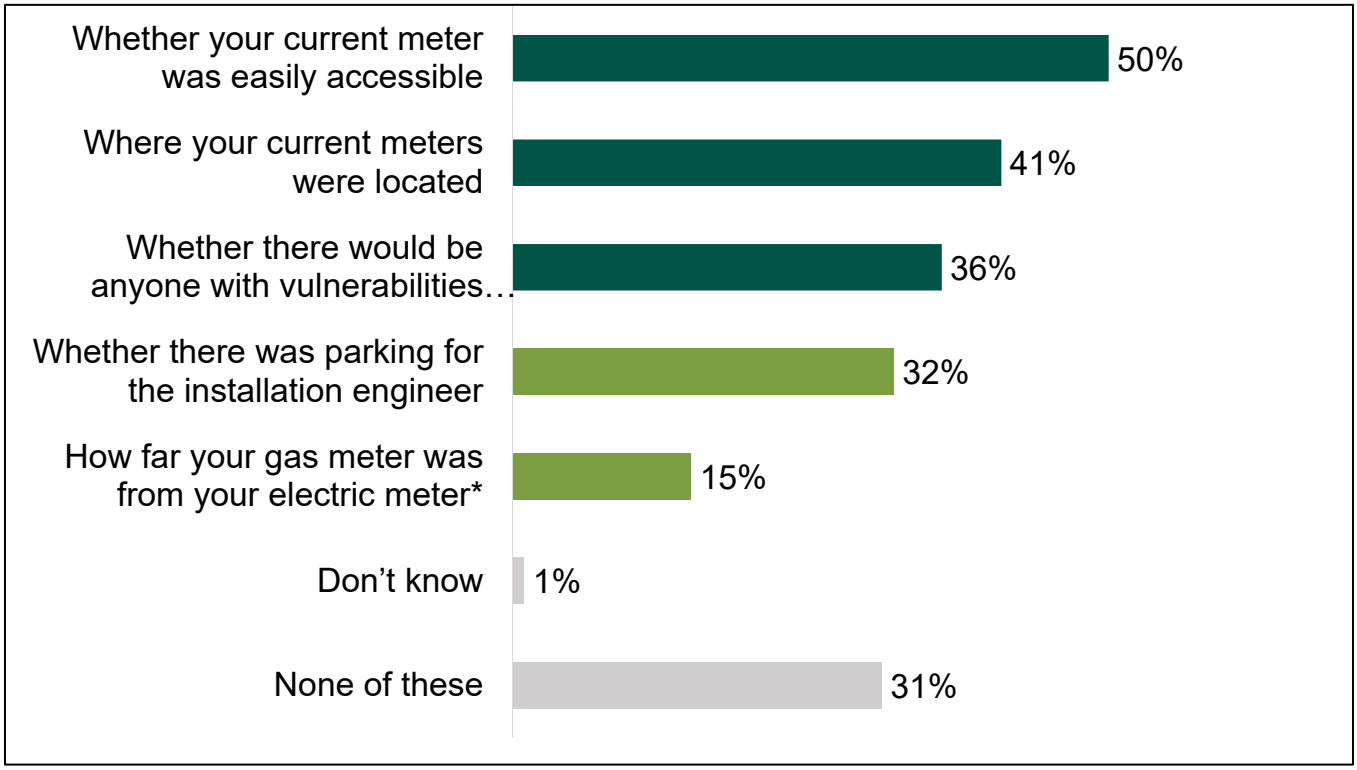
Information collected at the booking stage

During the booking process energy suppliers may ask a number of questions related to the property to ensure installers are prepared before they arrive; including three 'good practice' questions which can be seen highlighted by the dark green bars in Figure 3.4 below.[8]

Three in ten (31%) reported not being asked any of these questions at the point of booking. Regarding the 'good practice' questions, half (50%) of customers reported being asked whether their current meter was easily accessible, two fifths (41%) were asked where their current meters were located and just over a third (36%) were asked whether there would be anyone with vulnerabilities present at the install.

[8] These 'good practice' statements are the key statements that suppliers should ask to help minimise installation failure on the day

Figure 3.4. Booking questions asked to customers



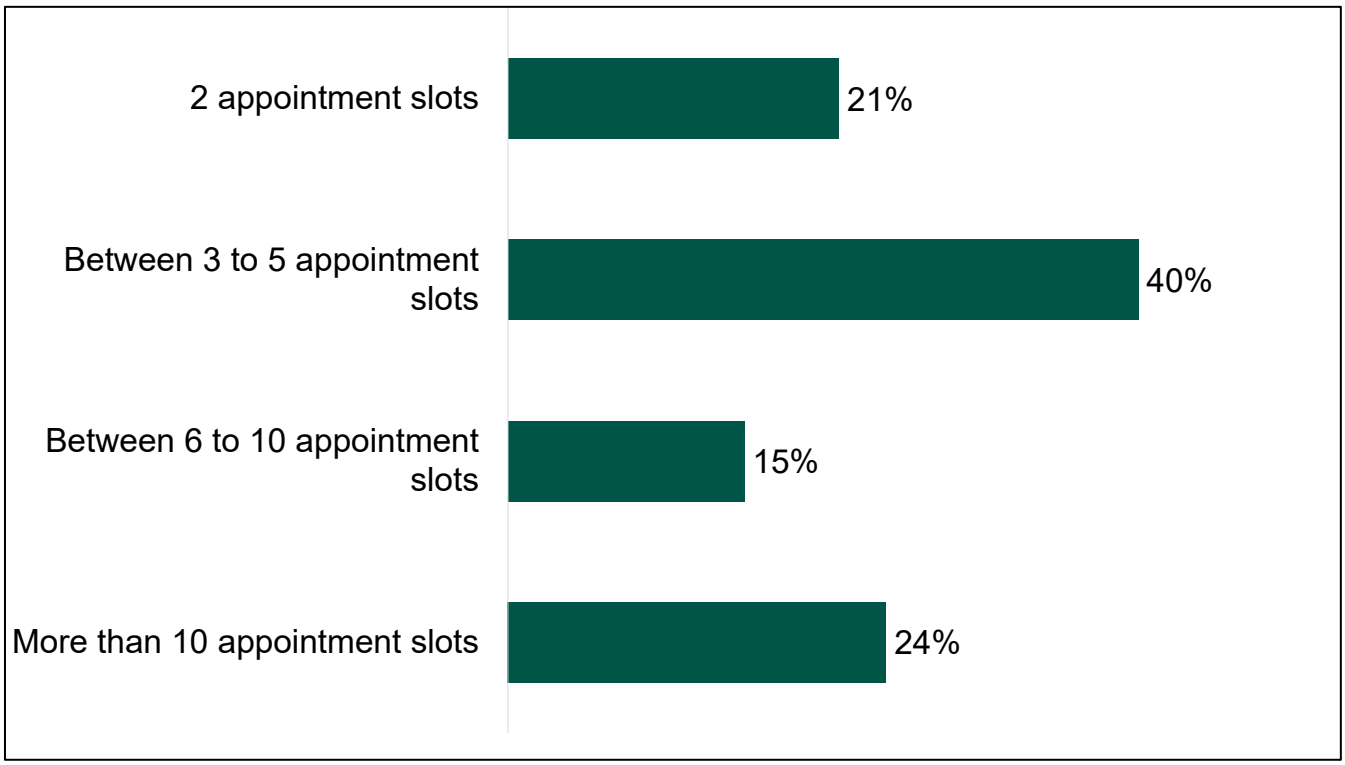
A5. Were you asked any of the following questions? Base (Multicode- chart will not total 100%): All domestic customers (274), *Base: All dual fuel customers (230)

One fifth (20%) of customers were asked all three of the 'good practice' questions by their energy supplier during the booking process. Nearly half (45%) of customers were asked 1 or 2 of the 'good practice' booking questions, whilst over a third (35%) were asked none of the 'good practice' questions by their energy supplier during the booking process.

Availability of appointment slots

Over three quarters (78%) of customers who successfully booked an installation were offered a range of appointment slots to choose from, with 79% offered three or more appointment slots when booking their smart meter installation as shown in Figure 3.5. Three fifths (60%) of customers were able to get a smart meter installation appointment within 2 weeks of the day of their booking, with the most common appointment window being 1-2 weeks from booking (26%).

Figure 3.5. Number of appointment slots offered to customers

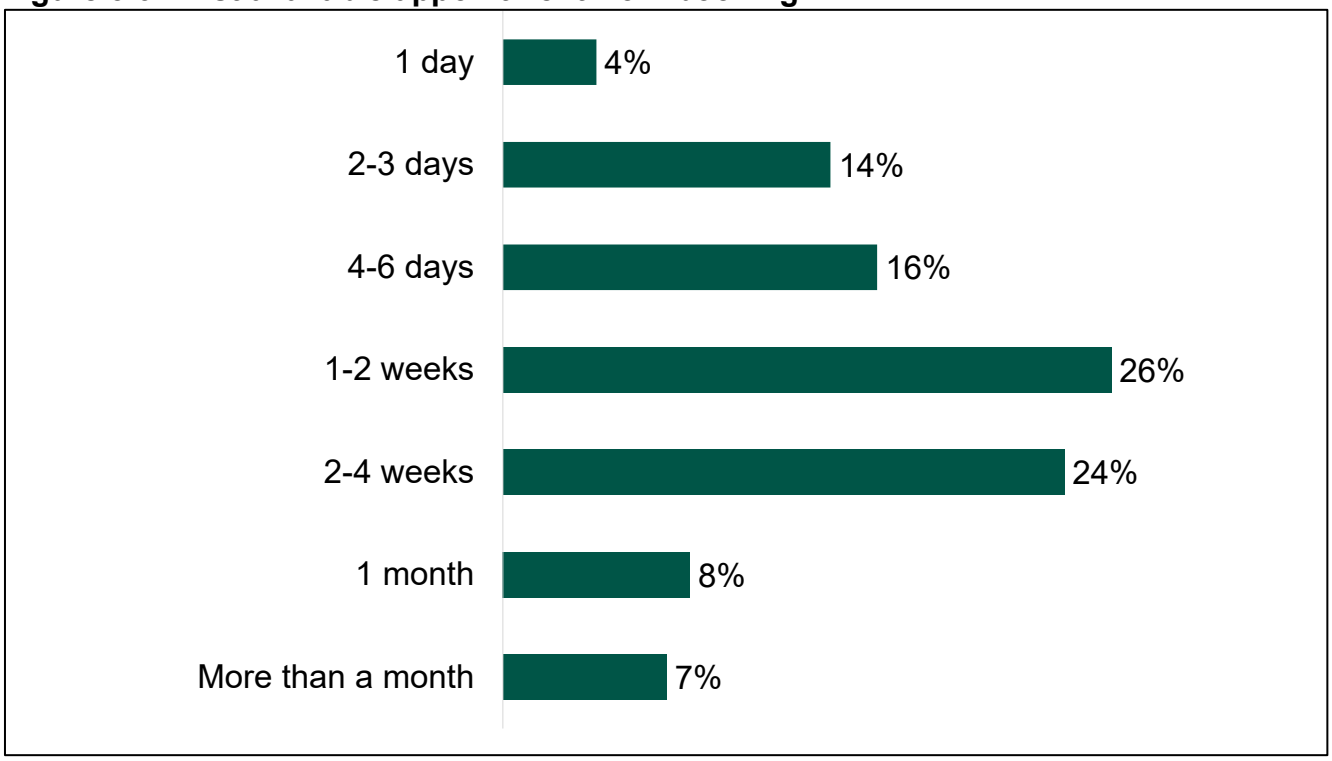


A23. How many appointment slots were you able to choose from? Base: All domestic customers offered multiple appointment slots (156)

Customers were asked when their first available appointment was from the day of their booking. The majority (65%) reported needing to wait at least one week from the day of their booking for an appointment as seen in Figure 3.6. A small minority (15%) reported having to wait at least a month for the first available appointment.[9]

[9] Of the total sample who attempted to book an appointment (including those who were ultimately unable to), 68% reported that the first available appointment was within one month.

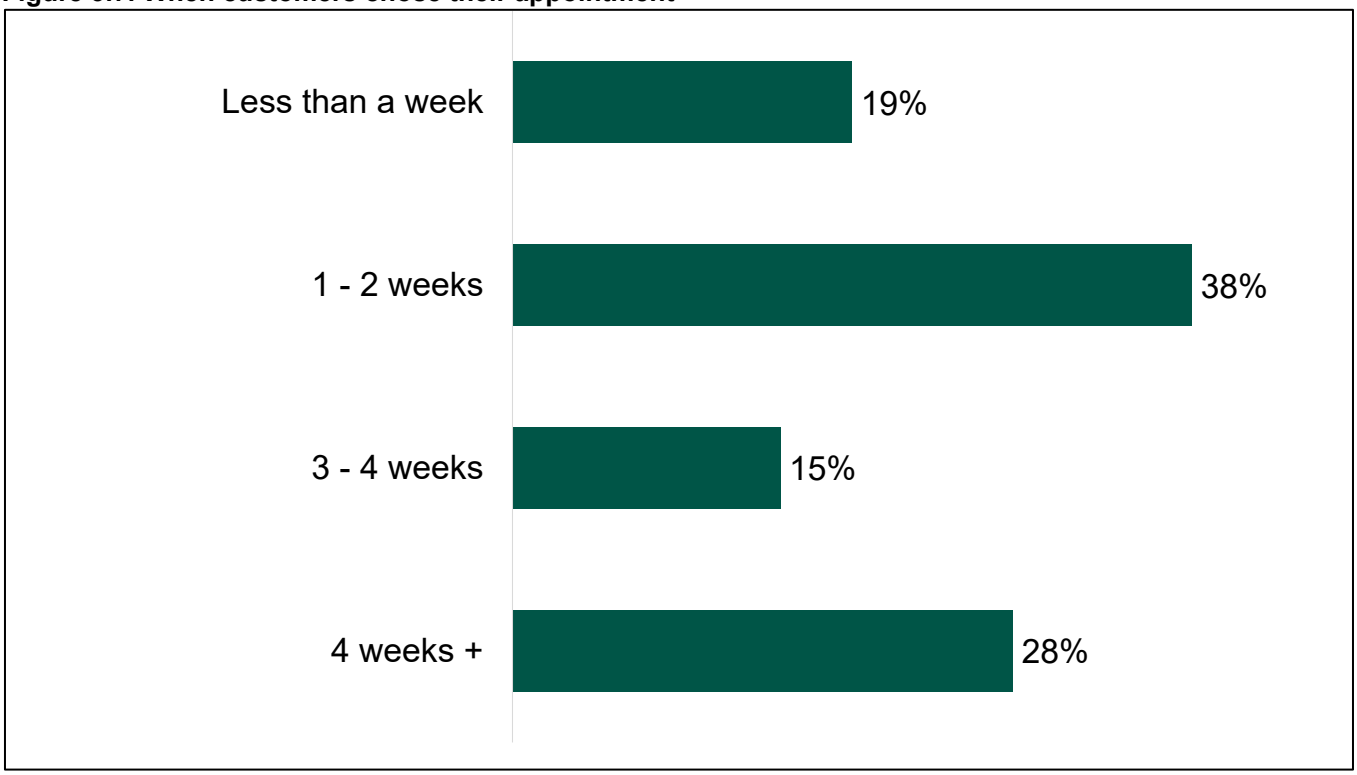
Figure 3.6. First available appointment from booking



A25. How far ahead from the day you made your booking was the first available appointment?
Base: All domestic customers who had a successful booking (201)

Figure 3.7 shows the length of time between the date they booked the installation and the installation date they chose, with more than half of customers (57%) choosing their appointment to take place within 2 weeks. The remainder chose a booking time of between 3-4 weeks (15%) and more than four weeks (28%). This suggests that energy suppliers are offering a range of booking timeframes for customers to choose from. From a customer perspective, this is a positive result, given figure 3.7 shows that customers have broadly shown as much desire to have appointments take place within two weeks of booking (57%) as to have appointments take place 3 weeks later or longer (43%).

Figure 3.7. When customers chose their appointment

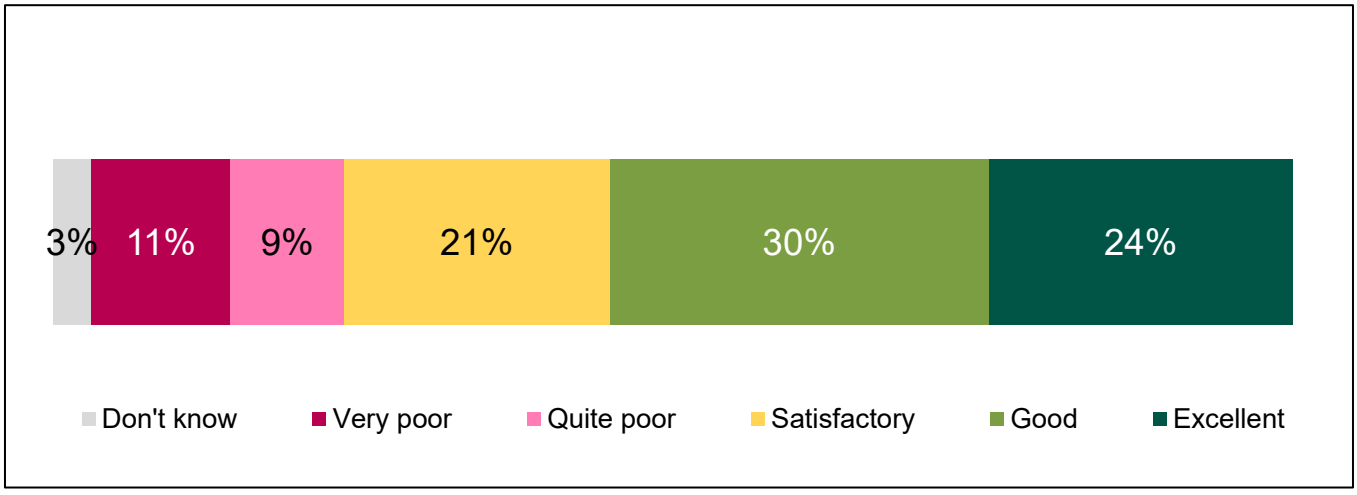


Derived variable. How long was the wait between the day you made your smart meter booking and your choice of smart meter installation appointment? Base: All those who provided a date for their booking and their installation (198)

Booking experience

Just over half (54%) of customers rated their booking process as ‘good’ overall, whilst a fifth (20%) rated the process as ‘poor’. There was a considerable difference in reported experience depending on whether or not the booking was successful. Nearly seven in ten (69%) of those with a successful booking rated the process as good, compared to 15% of those who were unsuccessful.

Figure 3.8. Rating of booking process



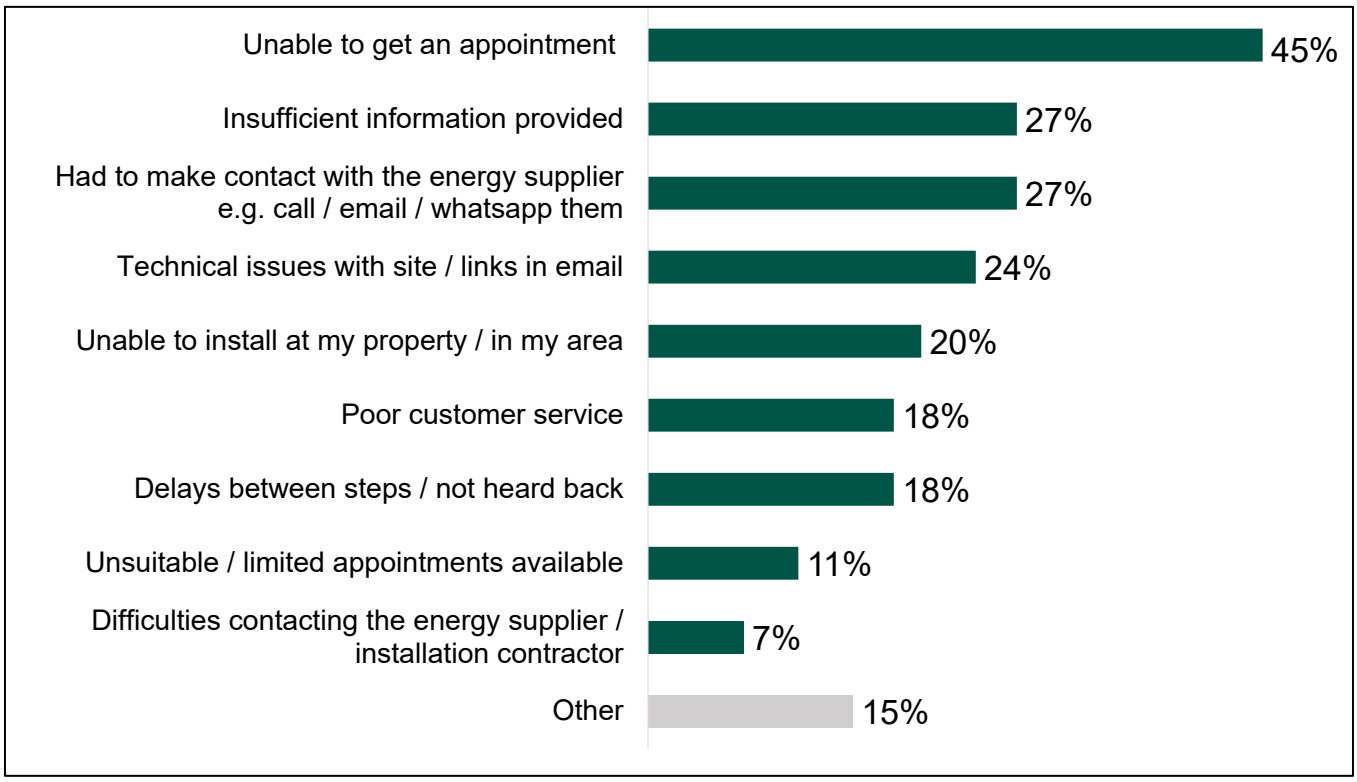
A32. How would you rate the process of booking your install? Base: All domestic customers (274)

- Customers who were given a choice of installation appointments were more likely to rate the process as good or excellent (74%).
- Customers were more likely to rate the booking process as good or excellent if they chose an installation appointment less than two weeks after their date of booking (78% of those who waited less than a week; and 71% of those who waited 1-2 weeks).

Those who ran into problems that would have normally resulted in them giving up if they weren't participating in the research were more likely to rate the booking process as poor (59%), whilst 93% of those who didn't have any problems rated the booking process as at least good. Additionally, although not statistically significant, those in other subgroups who rated their booking process as at least good included 65% of those who paid their energy supplier via prepayment. By comparison, 53% of those who were credit customers rated their process as at least good.

Of the fifth (20%) of customers who rated their booking process as poor, the most common reasons for this were due to being unable to get an appointment (45%). As seen in Figure 3.9, however, there was a range of other reasons given, a number of which related to a lack of communication from the energy supplier (e.g. 27% reported that they received insufficient information, while a further 27% reported having to proactively make additional contact the energy supplier themselves).

Figure 3.9 Reasons for rating the booking process as poor



A33. Why is that? Base (Multicode- chart will not total 100%): All domestic customers who had a poor experience during booking (55)

Chapter 4: Domestic pre-installation

Sample: 153

This chapter presents the second stage of the customer journey, the domestic pre-installation stage, exploring the communications received from their energy supplier, information provided by energy suppliers at this stage and whether their installation appointment needed to be rearranged.

The majority (69%) of customers who successfully booked an installation were contacted between their booking and installation by their energy supplier, with nine in ten (90%) of those reporting they found the communications useful.

Just under half (48%) of customers were informed of all four good practice statements at either booking or pre-installation stage, while a quarter (24%) of customers were informed of only one or two of the 'good practice' statements at either the booking or pre-installation stage, and 25% were informed of three of the 'good practice' statements.

No customers attempted to cancel their installation appointment and none were contacted by their supplier to cancel their installation. However, 5% of customers tried to change their appointment and 2% of customers were contacted by their supplier to change their appointment.

Information provided at this stage

Between the booking stage and the installation appointment, energy suppliers may provide customers with standard information regarding their upcoming smart meter installation; including four 'good practice' statements which can be seen in Figure 1.10 below. Questions regarding the 'good practice' statements were asked at either the booking stage and the pre-installation stage.

As seen in Figure 4.1, the majority of customers reported that they were informed of multiple details regarding their installation. Over eight in ten reported that they were told that the installer would need access to their current meter (86%), and three 'good practice' booking statements, that the energy supply would need to be turned off for around 30 minutes (85%), that an adult would need to be at home to let the installer in (85%), and that the booking time was a window within which the engineer could arrive, with the installation likely lasting 1.5-2 hours (84%). Only just over half (56%) reported that they were informed the engineer would offer an IHD and provide energy efficiency advice (the final 'good practice' statement).

Figure 4.1. Information provided to customers in advance of the install

Statement	Percentage
The installer would need access to your current meter	86% (Only asked at pre-install)
The electricity and gas supply would need to be turned off for around 30 minutes [‘GOOD PRACTICE’ STATEMENT]	85%
Someone aged 16+ will have to be at home that day to let the installer in [‘GOOD PRACTICE’ STATEMENT]	85%
The booking time was a window in which the engineer could arrive and the appointment would likely last 1.5-2 hours [‘GOOD PRACTICE’ STATEMENT]	84%
The area around your meter should be cleared/ensure the installer can access your meters	65% (Only asked at pre-install)
The engineer would offer an IHD and provide energy efficiency advice during their visit [‘GOOD PRACTICE’ STATEMENT]	56%
You will be offered advice on energy saving	27% (Only asked at pre-install)
If the install would be carried out by a third-party meter operator	23% (Only asked at pre-install)
Your rights as a renter^	22%
The energy supplier’s no-show policy if YOU cancel an appointment*	19%
The energy supplier’s no-show policy if THEY cancel an appointment*	15%
None of these	4%
Something else	4%

A1. Were you told (by the call handler or in any contact you received) any of the following details about your installation? Base: All pre-installation domestic customers (153). *Only asked at booking stage. Base: All booking domestic customers (274), ^Base: All renters (83)

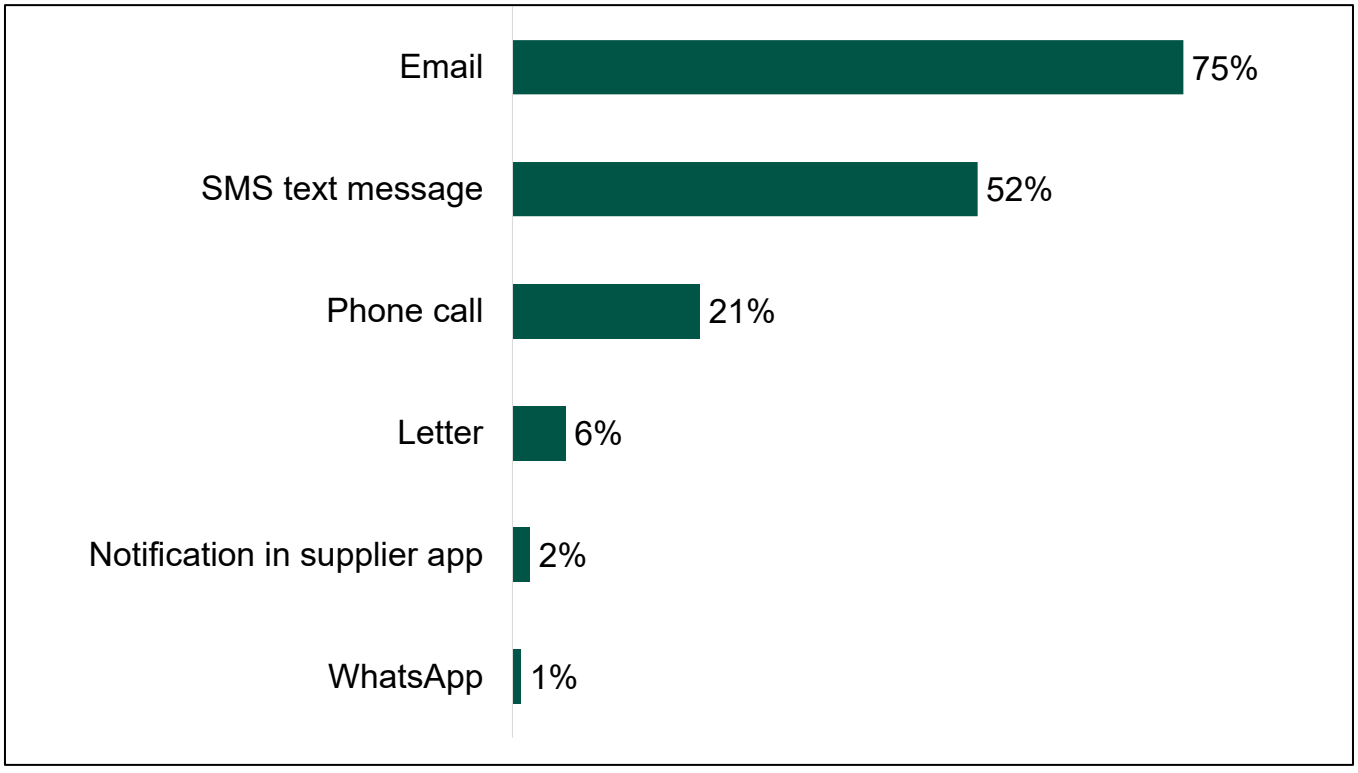
Just under half (48%) of customers were informed of all four 'good practice' statements at either booking or pre-installation stage, while a quarter (24%) of customers were informed of only one or two of the 'good practice' statements at either the booking or pre-installation stage, and 25% were informed of three of the 'good practice' statements. Only 2% of customers reported not being informed of any of the key statements at either booking or pre-installation stage.

Communications from their energy supplier

Over two thirds (69%) of customers who successfully booked an installation were contacted by their energy supplier between their booking and their installation. However, of those who had received communications only a third (35%) were asked to actively re-confirm their appointment with their supplier. It is worth noting here that the pre-install survey was issued four days prior to the installation, so there is the possibility that communications were made after the survey was completed and before the installation. Additionally, it is possible that customers could have received passive reminders of the appointment, which customers were not explicitly asked about at this point.

Of those who received communications, the majority were contacted a minimum of two times or more (65%), whilst just under a third (31%) were only contacted once. As shown in Figure 4.2 most customers were contacted by email (75%), while around half (52%) were contacted by SMS text message.

Figure 4.2. Channels used by energy suppliers to contact their customers



A4. How did you receive these communications? Base (Multicode- chart will not total 100%): All those who received communications between booking and installation (105)

Of those who were contacted by their energy supplier between booking and installation, nine in ten (90%) customers found the communications useful.

Changing of appointments

No customers attempted to cancel their installation appointment and none were contacted by their energy supplier to cancel the installation. A minority (2%) of customers were asked to change their appointment by their energy suppliers, whilst a minority (5%) of customers tried to change their appointment.

Of the customers who tried to change their appointment, most found the process easy, and most were offered a range of appointment slots. Of customers that were asked to change their appointment by their supplier, most were given more than 5 days' notice but one was given less than 24 hours' notice.

Chapter 5: Domestic installation

Sample: 135

This chapter presents findings from the domestic installation survey, predominantly focusing on whether the installation was successful or not, why some customers experienced unsuccessful installations, what was discussed during the installation, and overall satisfaction with the installation experience.

For the vast majority (89%) of customers their meter was successfully installed. For those that had an unsuccessful installation, the most common response was that additional works were needed at the property. Findings relating to the In-Home Display (IHD) were similarly positive, with the vast majority (94%) of customers who had a meter installed being offered an IHD - most (89%) were offered and accepted this IHD, although 5% were offered one and declined it. Of those that accepted the IHD, most (84%) were provided a demonstration. Of these, most (85%) found it easy to understand.

Less than half (41%) of customers said they received energy saving advice, or were provided with supplementary materials to help them understand how best to use their smart meter (49%).

Overall satisfaction with the installation was high with more than three-quarters (78%) of customers reporting that they were satisfied with the overall installation experience. One in ten (12%) customers were unsatisfied with the overall installation experience.

Installation status and issues

Installations were, on the whole, largely successful and free of issues. Nine in ten (89%) customers were able to have at least one smart meter installed. This includes 87% who had the electricity and gas meters (if dual fuel customers) in their household updated to a smart meter, and 2% that had only one of these meters successfully installed.

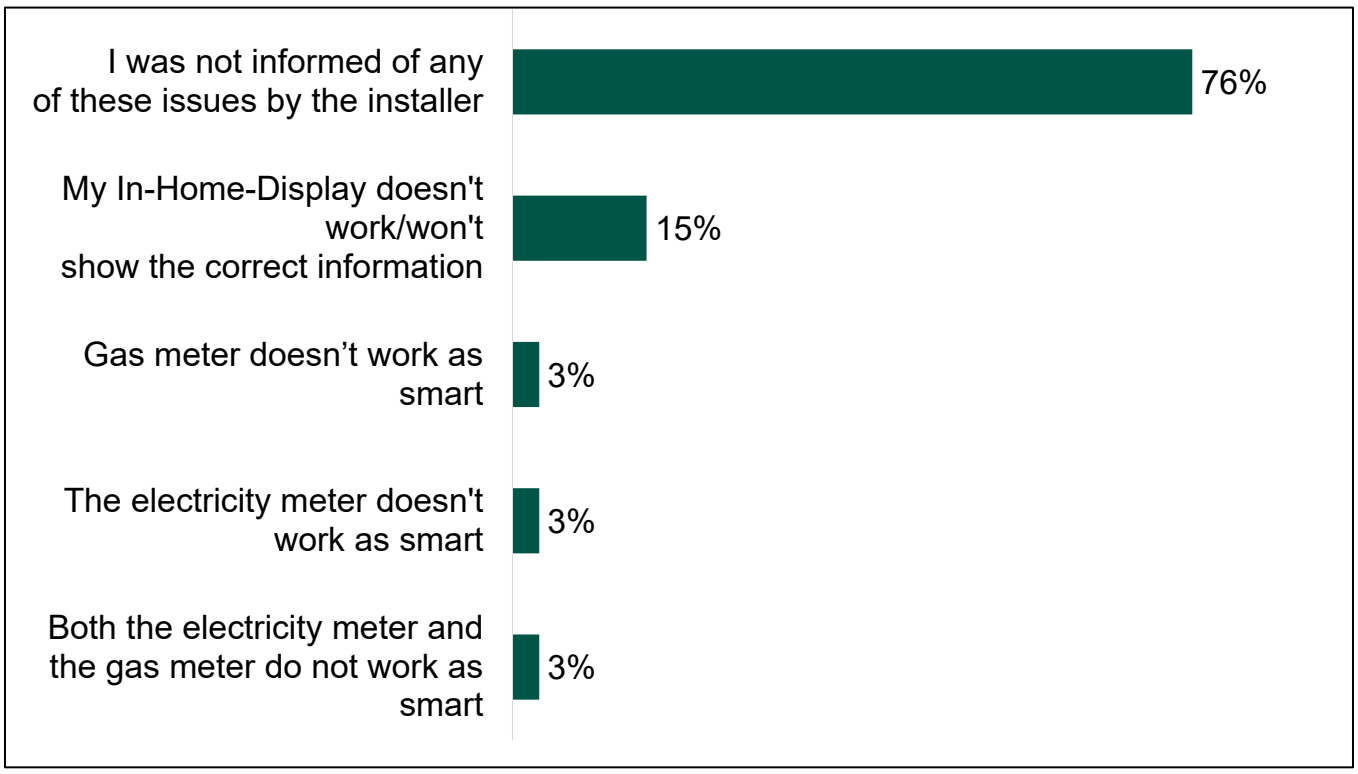
Of the 18 customers who did not have a successful installation

- 13 reported that the installer explained to them why a smart meter could not be installed. The most commonly cited reason was that the property required additional work before an installation could be carried out.
- For 4 of the 18 customers, the installer did not arrive and did not tell them they were not coming.
- The remaining customer reported that while the installer did arrive, they were not offered any explanation for a lack of installation.

Of these 18 customers, 16 of them were not offered alternative appointment slots. It is worth noting that it is likely that because additional work was needed (8 customers required this) which would likely involve third party support, appointment slots would be difficult to offer.

As Figure 5.1 shows, three quarters (76%) of those who had a smart meter installed said they were not informed of any issues by the installer. However, 15% reported that the In-Home Display (IHD) did not work correctly at the time of the install. Less commonly mentioned issues included the meters not working as 'smart'[10].

Figure 5.1 Issues during installation



A5d. What issues did the installer face with the installation? Base: All domestic customers who had at least one smart meter installed (120)

The majority of installations fell within 30 minutes and 2 hours, aligning with the expected timeframe: generally, a single fuel install takes around an hour and a dual fuel install around 2 hours. However, just under a fifth (16%) reported that the installation lasted more than 2 hours. Of the installations that took under 30 minutes, 10 of these 14 were for installations that were unsuccessful.

A quarter (25%) of customers who had a smart meter successfully installed faced issues with their installation. Of these, 5 were told they needed a second visit to take place, 10 were told that the installer would try to fix the issue remotely, and 9 reported that no next steps were communicated to them.

IHD usage and understanding

Energy suppliers are required to offer an IHD to customers. Over nine in ten (94%) of those with a successful installation were offered an IHD. In total, 89% accepted one, with a further

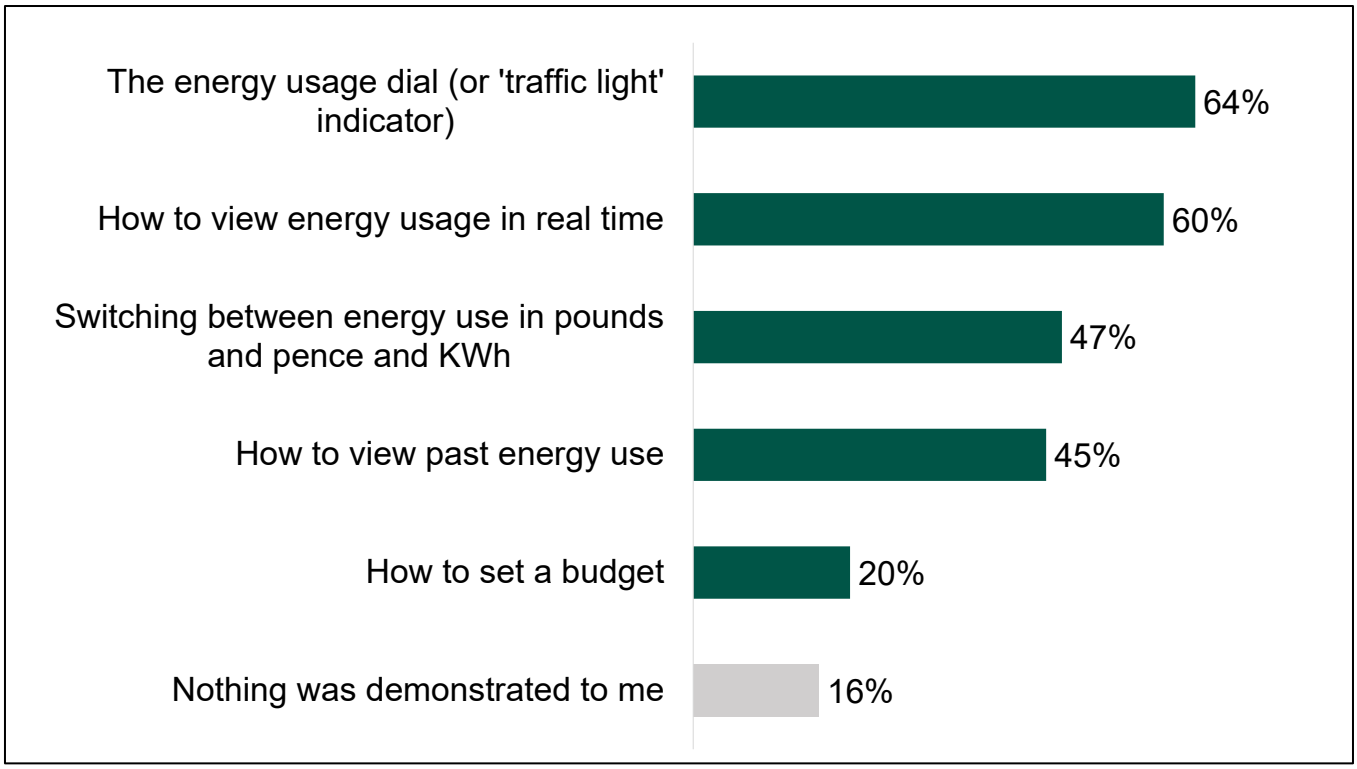
[10] A 'smart' meter not working as 'smart' is one that doesn't send automatic meter readings to the energy supplier

5% being offered one but not accepting it. Only 6% were not offered an IHD. There was no clear pattern by subgroup, with key subgroups of interest shown below:

- 88% of customers who used credit to pay (n=108) accepted an IHD, compared to 100% of those using a prepayment method (n=12)

As shown in Figure 5.2, 84% of those that accepted an IHD had features explained to them. The most common IHD feature explained to customers was the energy usage dial (64%). Three fifths (60%) were told how to view real time energy usage, while just under half were shown how to switch between pounds and pence to KWh (47%), or how to view past energy use (45%). Just under a fifth (16%) said no features were demonstrated to them.

Figure 5.2 IHD features explained to customers



A13. Which of the following features of the IHD were demonstrated or explained? Base (Multicode- chart will not total 100%): All domestic respondents who had a smart meter and an IHD installed (88)

Over four fifths (85%) of those given a demonstration of the IHD said it was easy to understand, with only one in twenty (5%) deeming it difficult.

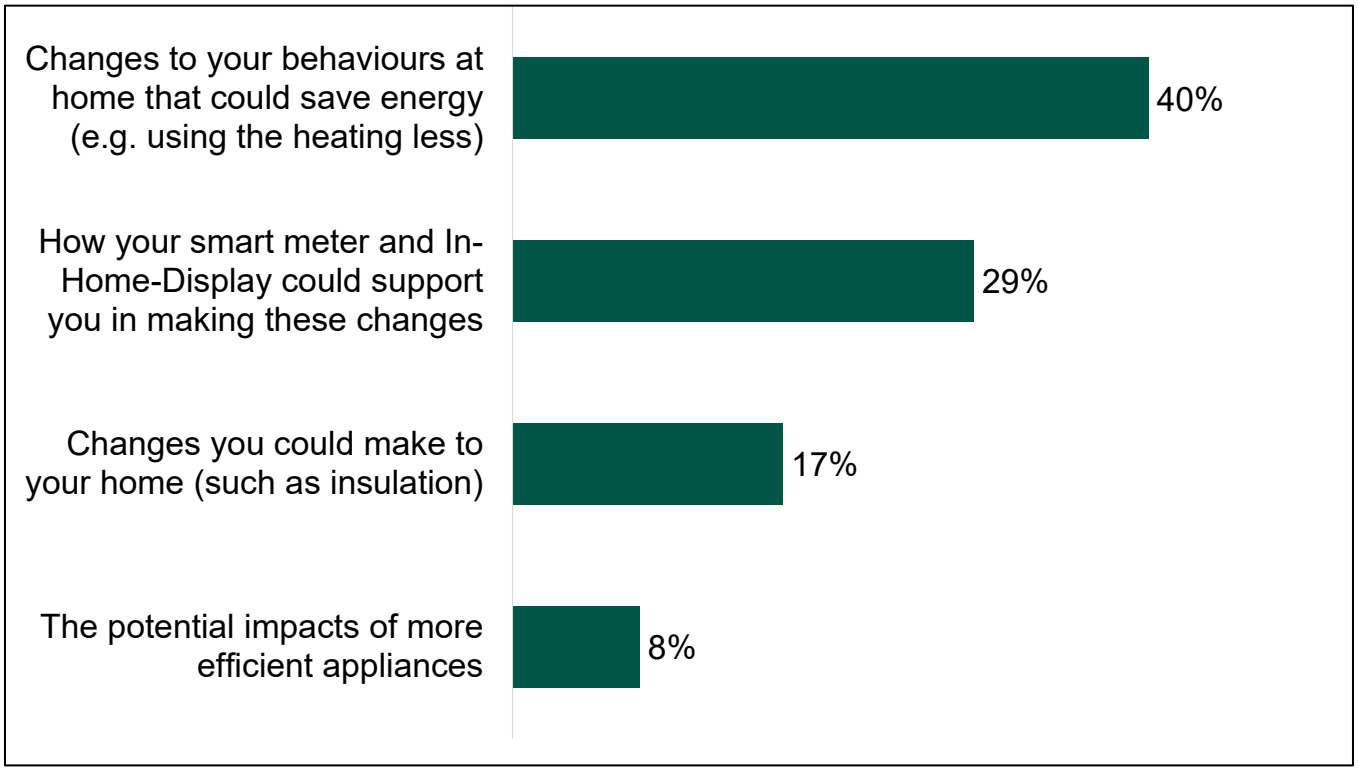
Information provided

It is expected that energy suppliers provide information about how customer data will be collected at some point during the smart meter installation journey. Four fifths (80%) of customers who had a successful smart meter installation received information around what data their energy supplier would collect, and were given a choice over how frequently their energy supplier would collect their consumption data. However, of the 21 customers who were

informed of data sharing during installation, 6 were asked to choose how frequently their energy supplier could collect their consumption data.

Two fifths (41%) of customers recalled receiving energy saving advice. The most common advice provided was around behavioural changes that could save energy in the home (40% of those receiving advice), as shown in Figure 5.3. Almost three quarters (71%) of those who were offered energy saving advice felt that it was tailored to their household and circumstances.

Figure 5.3 Energy saving advice offered to customers during installation



A16. What advice were you given? Base (Multicode- chart will not total 100%): All domestic customers who were offered energy saving advice at installation (48)

Half (49%) of all those who had a smart meter installed reported having received supporting materials. Of these, two thirds (65%) were provided with an information booklet, while under a third (30%) were provided with a leaflet (without specifying what exactly this covered). Seven percent also reported being signposted to other additional forms of support.

Installer behaviour

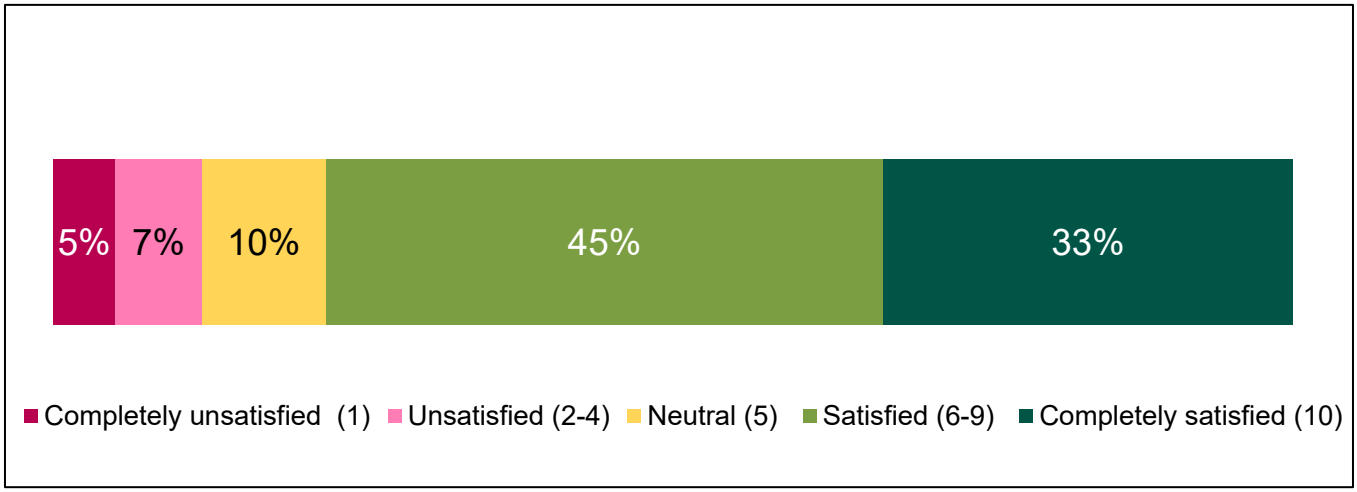
Installer behaviour was rated very positively. Three quarters of all customers (74%) reported that the installer had called ahead of time to inform them of their arrival time. Almost all (95%) of those who had an installer arrive said that they were polite and courteous during the installation procedure. Nearly nine in ten (86%) also agreed that information provided to them during the installation was clear and understandable.

A lower proportion - although still over two thirds (69%) – agreed that the length of time it took for the installer to demonstrate the system, provide advice and answer any questions was appropriate. Nearly a fifth (19%) did not think it was appropriate.

Installation satisfaction

Satisfaction at this stage of the domestic journey was relatively high. Nearly eight in ten (78%) of customers were satisfied with the installation experience overall, while just over one in ten (12%) were dissatisfied.

Figure 1.4 Satisfaction with installation experience



A26. On a scale of 1-10, with 10 being completely satisfied and 0 being completely unsatisfied, how satisfied were you with your experience? Base: All domestic customers who attempted to have a smart meter installed (135)

Chapter 6: Domestic post installation

Sample: 101

This chapter presents findings from the domestic post-installation survey, predominantly focusing on any issues that have arisen since having the smart meter installed, changes in customer behaviour, and satisfaction with the overall process.

Since having their smart meter installed, the vast majority (91%) have checked their energy usage, with more than four-fifths (83%) having checked their energy usage via the IHD. Most customers found it easy to check their energy consumption (92%) and demonstrated a willingness to make changes to how they use energy in their home (77%). However, a minority (15%) reported they had experienced an issue with their smart meter at some point, citing either that the IHD or meter was not functioning properly. More than half of those who reported an issue say that issue has now been resolved.

Ultimately, the majority (86%) were satisfied with their smart meter and would recommend one to a friend or colleague (82%). A similar proportion (85%) were happy with the overall process of having a smart meter installed.

How customers checked their consumption data

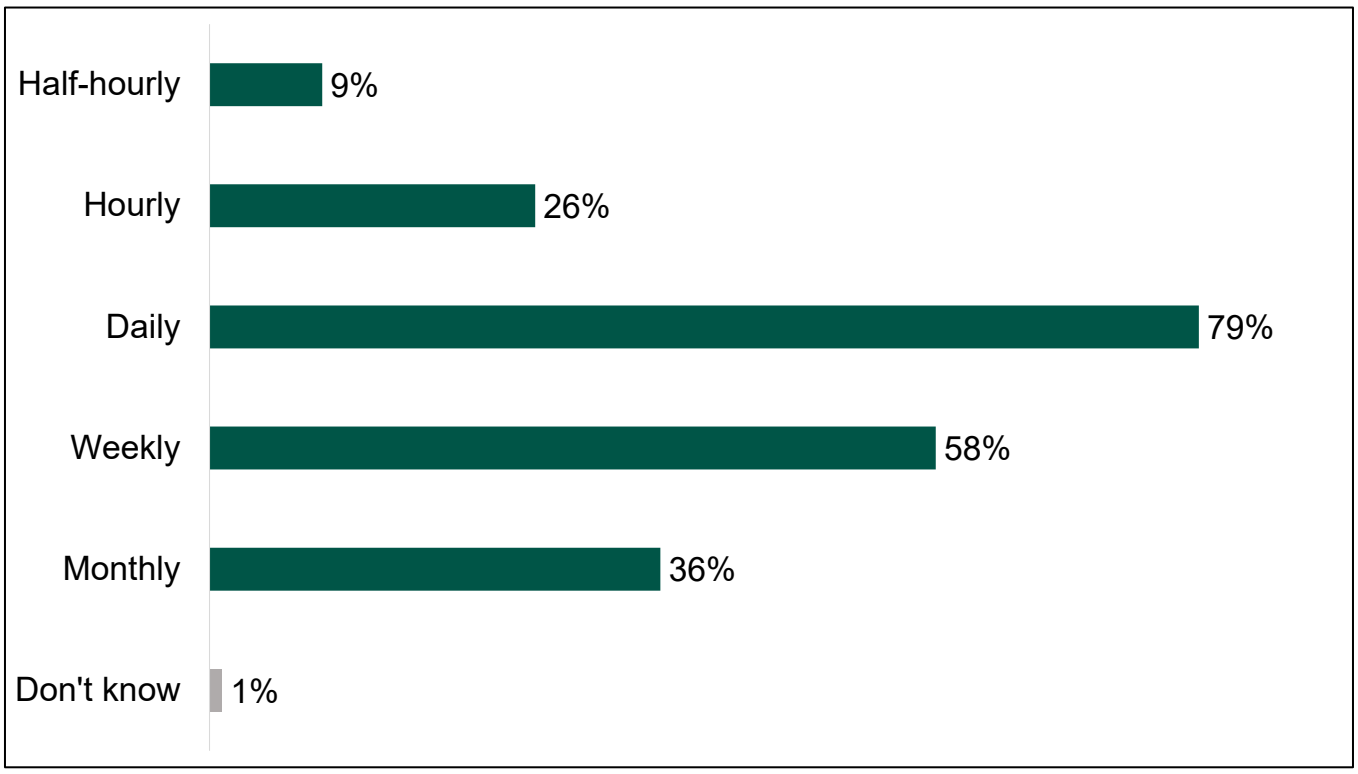
Over nine in ten (91%) customers had checked their data since installation of the smart meter. The most common means of checking data was via the In-Home Display (IHD), with over four fifths (83%) of those with a functioning smart meter checking this way. A quarter each also said they checked their data via the energy supplier's app (28%) or the energy supplier's website (26%).

Over nine in ten (92%) of those who had checked their energy use reported finding it easy to do so when using the IHD, app, or online account.

Of those with a functioning smart meter, over four fifths (83%) were confident that it was providing accurate data.

As shown in Figure 6.1, customers most commonly looked at their data via the daily breakdown (79%). A further three fifths (58%) said they used the weekly breakdown. Only around a third (36%) had used the monthly breakdown.

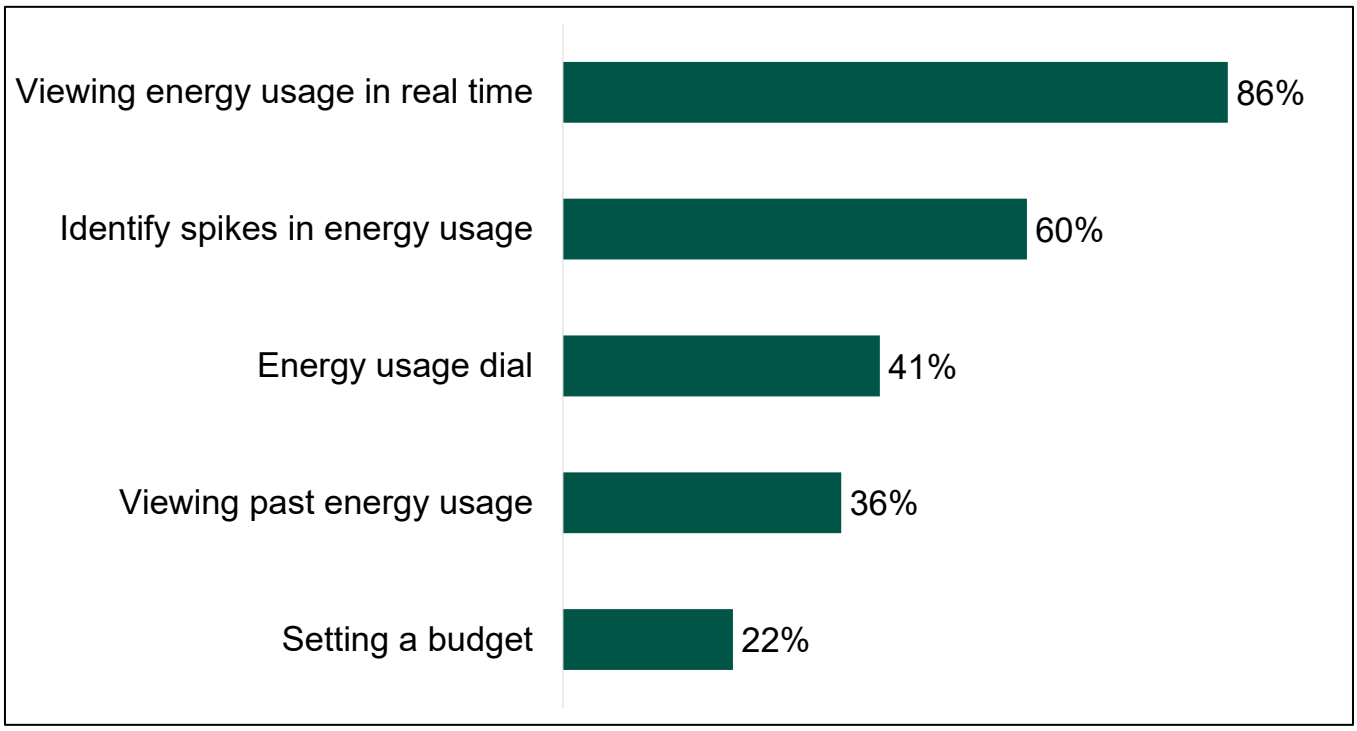
Figure 6.1 Breakdowns customers have used to check data



A4. Which of the following breakdowns have you used? Base (Multicode- chart will not total 100%): All domestic customers who have checked their usage (91)

Customers were shown a variety of features contained within the IHD. Figure 6.2 shows which of these customers perceived to be useful. The feature most commonly reported as useful by those who used the IHD was being able to view energy usage in real time, with nearly nine in ten (86%) finding it useful. Three fifths (60%) said that being able to identify spikes in energy usage was a valuable IHD feature, while, only around a fifth (22%) found being able to set a budget as beneficial.

Figure 6.2 IHD features customers perceived as useful

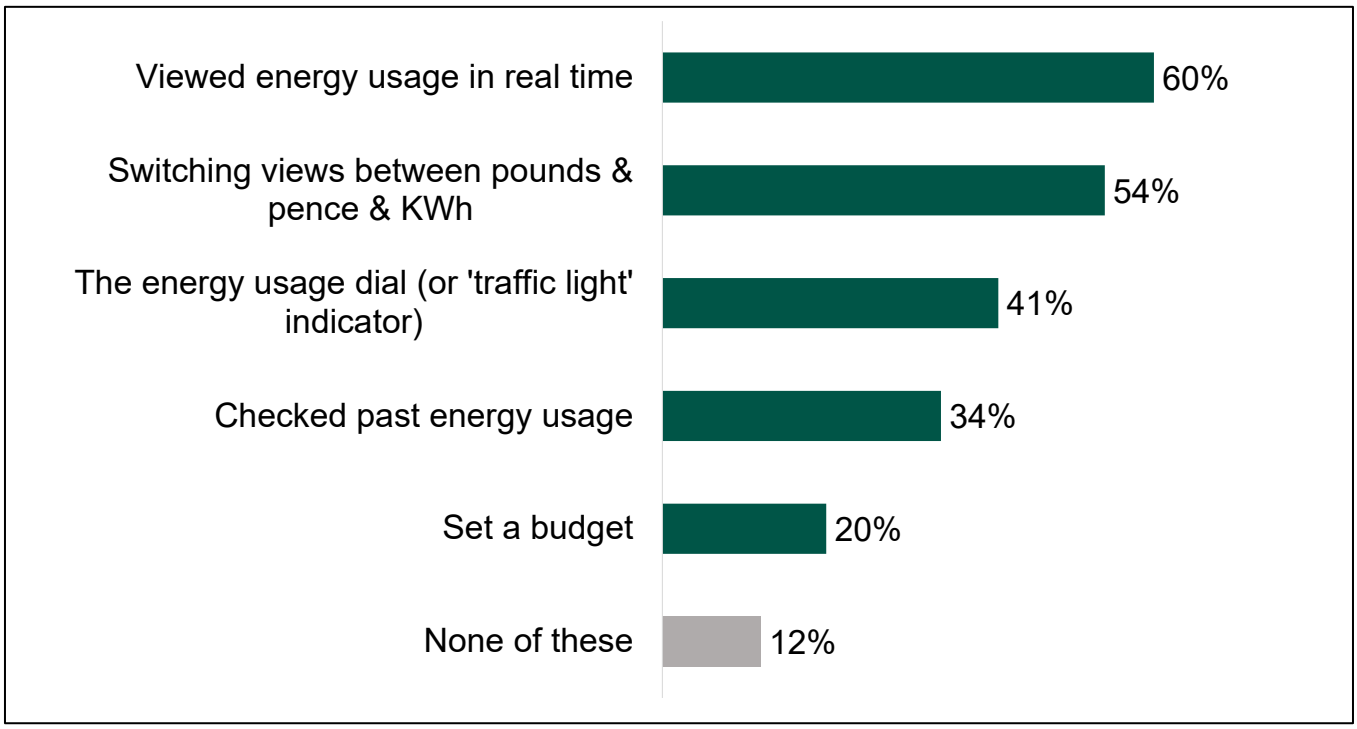


A4b. What, if anything, do you find particularly useful about the In-Home Display Base (Multicode- chart will not total 100%): All domestic customers who checked their energy usage via their IHD (83)

Figure 6.3 shows which features customers have actually used so far. Among customers who had checked their data via the IHD, three fifths (60%) had viewed energy usage in real time, and over half (54%) had used it to switch between viewing their energy use in pounds and pence to KWh. A fifth (20%) had used it to set a budget. [11]

[11] Interestingly, for all the IHD features (but particularly for viewing energy usage in real time), more customers reported the feature as being useful than the number who had actually used the feature. This discrepancy can most likely be attributed to some customers interpreting the question as asking what features they generally thought could be useful (to others or to themselves in the future).

Figure 6.3 IHD features customers have used



A4a. Have you used any other features of your In-Home Display Base (Multicode- chart will not total 100%): All domestic customers who checked their energy usage via their IHD (83)

Issues faced by customers

Around 15% reported experiencing issues after installation and were generally split between issues with the IHD and issues with the meter. Of the few that flagged issues at the install stage, most had managed to get these resolved by the time they took the post-install survey a month later.

In terms of issues faced in the period after installation, around one in seven (15%) of those with functioning smart meters experienced issues. Of the 15 customers that did face issues, 7 of these reported technical issues with the IHD (3 of whom had reported IHD issues in the installation survey). A further 5 customers reported that the meter or IHD simply did not work, and 3 customers said that they were still receiving estimated bills even with the smart meter installed.

Of these 15 customers, 12 customers tried to resolve their issue (including 4 who tried to fix the issue themselves, 6 who contacted their energy supplier, and 2 customers who said they did both). Ultimately, 8 customers – around half – were able to get their issue resolved.

Behavioural changes

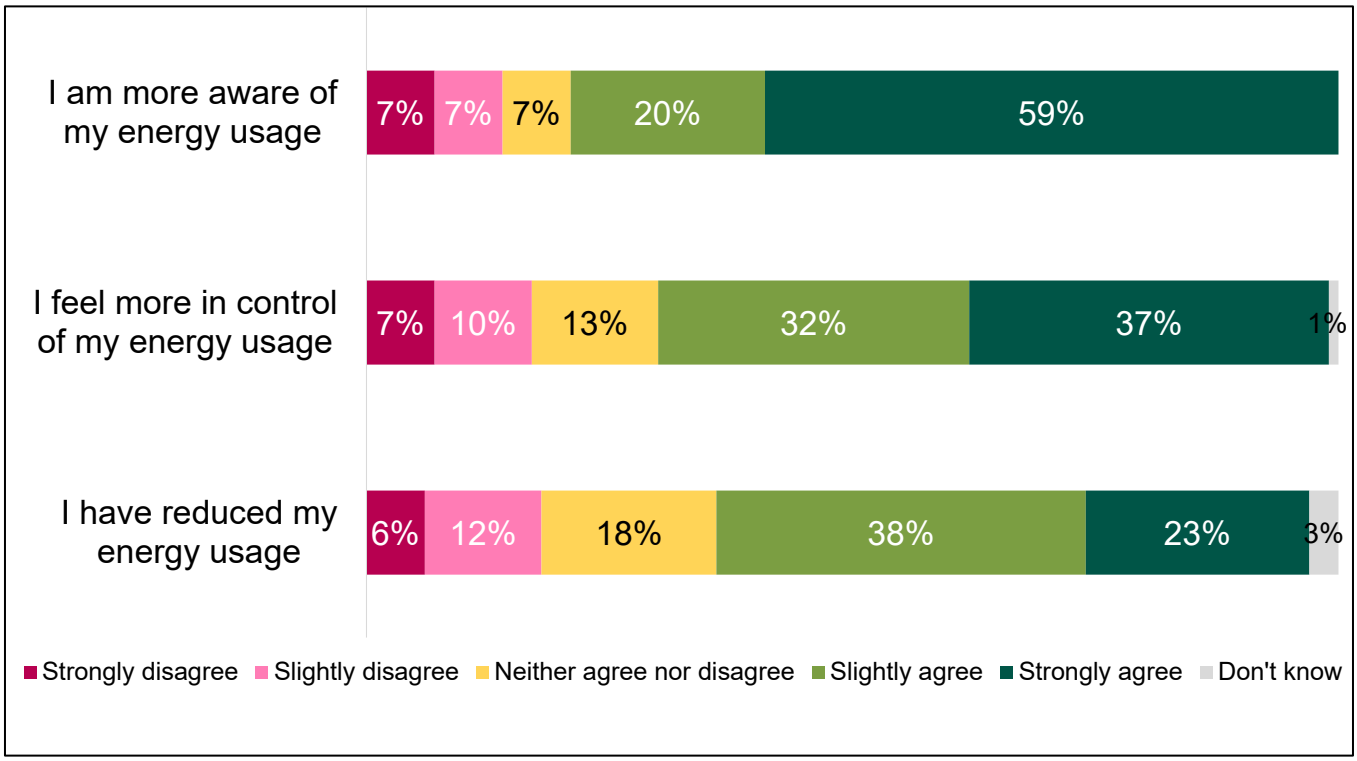
Customers generally showed a willingness to change their behaviour around how they use energy in their home after having their smart meter installed.

Around four fifths (79%) of those with a functioning smart meter at installation said they were more aware of their energy consumption after having a smart meter installed. A similar proportion (85%) said they felt confident using it to keep track of their energy use.

This increased confidence and awareness often translated into a sense of greater consumer agency, with just over two thirds (69%) saying that they now felt more in control of their energy use. Similarly, over three quarters (77%) said that they were likely to make changes to their energy consumption at home.

However, a lower proportion (61%) reported having actually reduced their energy consumption after the install, or said they were likely to take advantage of different energy tariffs[12] if available (63%). Half (50%) said they were likely to make changes to their home (e.g. installing insulation or energy efficient appliances) as a result of the smart meter.

Figure 6.4 Agreement with below statements



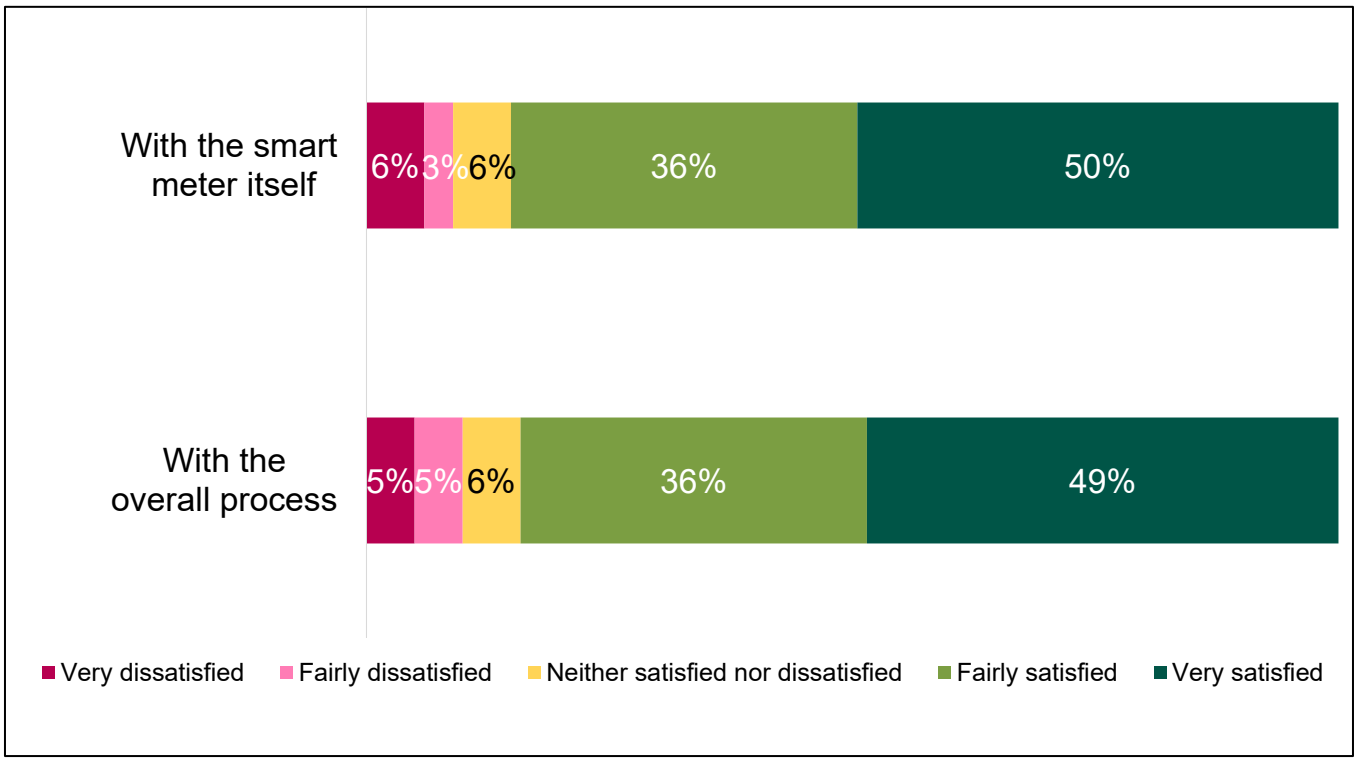
C6l. Since installing your smart meter, to what extent do you agree or disagree with the following statements…?
Base: All domestic customers with a functioning smart meter (100)

Overall satisfaction

Satisfaction was again high at this stage of the journey. Almost nine in ten (85%) customers were satisfied with the overall process of getting a smart meter. Similarly, close to nine in ten (86%) customers were satisfied with the smart meter itself.

[12] Such as a time of use tariff which offers cheaper 'off-peak' rates for energy at times of night or day when demand is lower or participating in the Demand Flexibility Service which offers consumers discounts on their energy bills for using less energy at specific times when demand is higher

Figure 6.5 Satisfaction with smart meter and overall process



D9/D10. How satisfied are you…? Base: All domestic post-install customers (101)

Those who rated the booking process as 'good' were statistically more likely to be '*very* satisfied' with the overall process (59% versus 49% average). Again, those who rated the booking process as 'good' were statistically more likely to be '*very* satisfied' with the smart meter (59% versus 50% average).

Ultimately, over four fifths (82%) of all customers said they would recommend a smart meter to a friend, colleague or relative (with 45% saying they would 'definitely' recommend one). Under one in ten (8%) said they would not recommend one.

While only a third (34%) of customers had been contacted by their energy supplier since installation, nine in ten (91%) of these felt the communication was provided in a suitable format, and a similar proportion (85%) agreed that they had understood all of the information they received.

Chapter 7: Domestic Conclusions

Generally, the domestic smart meter installation customer journey is efficient, with the majority of customers being able to book a smart meter and have it successfully installed. However, there are some genuine difficulties that customers face at the booking stage of the journey.

The most acute issues typically occur at the booking stage. Over a quarter (27%) of domestic customers that took part in the research were unable to get a smart meter installation booked, usually because there were no appointment slots available for them. It should be noted that a quarter of these (24%) were informed that smart meter installations were unavailable in their area, an issue customers faced across a range of energy suppliers. Furthermore, a fifth (18%) of domestic customers who successfully booked their smart meter installation reported they encountered problems that would normally have made them give up if they were not participating in the research. Had they done so, the success rate would have dropped to 60%.

Of those who were unable to book an installation (27%), just under two-thirds (63%) were put on a waiting list for installation without a timeframe, whilst 5% were added to a waiting list with a timeframe. This meant that 32% of customers would be unable to be contacted should an appointment become available. A lack of a specific timeline for installation presents a risk that engagement with these potential customers is lost.

The booking stage was also where the research identified the lowest levels of satisfaction, with only 54% of customers noting the booking process to be “good” or “excellent”. The outcome of the booking process appeared heavily associated with satisfaction levels: 69% of customers with a successful booking rated their experience as at least ‘good’, compared with just 15% of those who were unsuccessful.

Once the customer had successfully booked a smart meter install, the rest of the journey appeared to have been more efficient and with fewer hindrances. At the pre-install stage, most customers were contacted beforehand (69%), and they typically found these communications useful (90%). A small minority (2%) of customers had to deal with energy suppliers changing their appointment, and none faced cancellations. However, there was evidence to suggest not all energy suppliers followed best practice:

- A majority (65%) of customers reported that they did not have their appointment actively re-confirmed (although this may be less necessary where the installation occurs within a short period of time of the booking being made, and some reminders might have been passive, which was not specifically asked about and suppliers might have used instead).
- Additionally, there were some pieces of information that only a minority of customers received. The most notable of these was the ‘no-show’ policies: only 19% were informed what the supplier’s policy for cancelling was if the customer cancelled with less than 24 hours’ notice, with 15% being made aware of the supplier’s policy for cancelling if given less than 24 hours’ notice.

Nevertheless, customers generally appeared to receive the necessary information at this stage of the journey in time for their installation.

There was a similar positive experience at the installation stage for the majority of customers, with 89% successfully having a smart meter installed. However, it should be noted that at this stage of the journey, there is some survivorship bias that needs to be considered. Customers that were unsuccessful with their installation may not have taken the time to complete the installation survey, knowing that they would be unable to complete the journey. However, to minimise this bias, an incentive was offered in these cases to encourage participation for those who couldn't have a successful install.

The majority of installations lasted under 2 hours and only a minority suffered issues during the process. Findings relating to the In-Home Display (IHD) were similarly positive, with the vast majority (94%) of customers who had a meter installed being offered an IHD. Most of these were given a demonstration (84%) and most found the IHD demonstration easy to understand (85%). One issue that was noted at this stage was the lack of energy saving advice that was provided, with only 41% receiving advice. However, for those that reached the installation stage of the journey, 78% of customers rated their installation experience as 'good', a substantial increase on the 54% at the booking stage.

Finally, customers have shown a positive response to receiving their smart meter which has led to (self-reported) behaviour changes. Since having their smart meter installed, most customers found it easy to check their energy consumption (92%) and demonstrated a willingness to make changes to how they use energy at home (77%). However, a minority (15%) did report issues with their smart meter. These were evenly split between issues with the IHD not functioning properly and issues with the meter. Ultimately, the majority (86%) were satisfied with their smart meter and would recommend one to a friend or colleague (82%). A similar proportion (85%) were happy with the overall process of having a meter installed.

These findings show that once the installation process has begun for domestic customers, it is generally seamless, efficient, and with tangible benefits. The key area for attention is the booking stage, where it will be important to reduce the barriers faced by customers in securing an installation appointment.

Non-Domestic Key statistics

- **Seven in ten (71%) successfully booked a smart meter installation**
- **Over four fifths (83%) had their smart meter installed**
- **Just under half (45%) rated booking stage as "good" or above**
- **Seven in ten (71%) were satisfied with their installation experience**
- **Four fifths (80%) were satisfied with the overall process**
- **Three quarters (74%) were satisfied with smart meter itself**
- **Four fifths (80%) would recommend a smart meter**

Chapter 8: Non-domestic booking

Sample: 78

This chapter presents findings from the first stage of the customer journey, the non-domestic booking survey; exploring if customers were able to book a smart meter installation or not, reasons why some customers were unable to book a smart meter installation, availability of appointments, and overall satisfaction with the booking process.

Over seven in ten (71%) businesses were able to book their smart meter installation, with four in ten (40%) able to book during their initial contact with their energy supplier and three in ten (31%) through further contact. Over seven in ten (71%) were provided with a range of appointment slots.

Although most businesses were provided with multiple appointment slots*, only a third (35%) were offered a choice of appointments inside or outside work hours and a fifth (20%) were offered a choice of weekday and weekend appointments. Just under half (45%) of businesses rated their booking process as 'good' overall, whilst a fifth (19%) rated the process as 'poor'.*

Booking successes and challenges faced

Over seven in ten (71%) businesses were able to book their smart meter installation, with four in ten (40%) able to book during their initial contact with their energy supplier and three in ten (31%) through further contact. However, over a quarter (29%) who tried to book a smart meter installation were unable to.

Although not statistically significant, differences could be seen on the success of booking through a number of different subgroups:

- Regionally, the Midlands was the best performing region with 14 of 16 businesses able to book an install; in the devolved nations only 4 out of 8 businesses able to book an install.
- A lower proportion of microbusinesses were able to book an install compared to non-micro businesses, with 35 out of 53 microbusinesses successfully booking compared to 16 out of 19 non-micro businesses.

Unsuccessful booking appointments

After contacting their energy supplier to book their installation, 29% of businesses were unable to book their appointment. For these 23 businesses, a range of reasons were given, including:

- None of the appointment slots were suitable for the business (5).
- Not currently available in their area (5).
- The business' energy supplier is unable to offer smart meters at this time (3).
- The business' current meter is not suitable for replacement by a smart meter (3).
- Waiting for 3rd party installation company to schedule the appointment (5)
- We could not find an available appointment (4)[13]
- Other reasons (6).

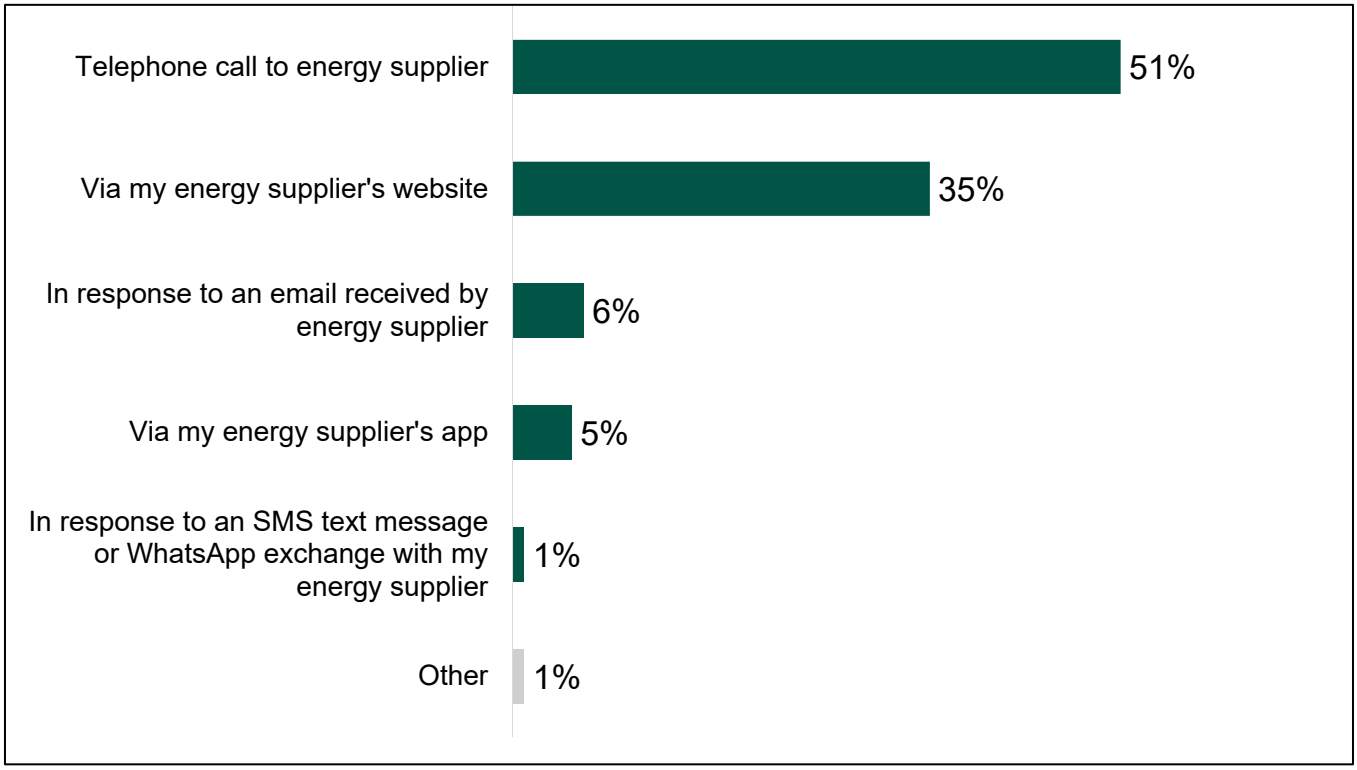
Of those who were unable to book a smart meter install, 18 were added to a waiting list for an appointment but were not provided with a timeframe, whilst one business was added to a waitlist with a timeframe. However, 4 of the 23 businesses were not added to a waiting list.

Booking process

As can be seen in Figure 8.1, half (51%) of businesses attempted to book a smart meter installation via telephone call to their energy supplier, followed by over a third (35%) attempting to book via their energy supplier's website.

[13] Please note that "Waiting for 3rd party installation company to schedule the appointment" and "we could not find an available appointment" were unprompted responses.

Figure 8.1. Channels used to attempt to book an installation appointment



A5. What was the main method you used to book your smart meter installation? Base: All non domestic customers (78)

During the booking process, 23% of businesses experienced problems whilst attempting to book their installation appointment. Of those that experienced issues, these included:

- 7 businesses who struggled to find available appointments, with one business being unable to find any appointment at an appropriate time for them.
- 4 who struggled to understand what was required during the process of booking their installation appointment.
- 1 had issues contacting their energy supplier, with another business reporting difficulties communicating between their energy supplier and the third-party operator.[14]
- One who found the online portal difficult to use.

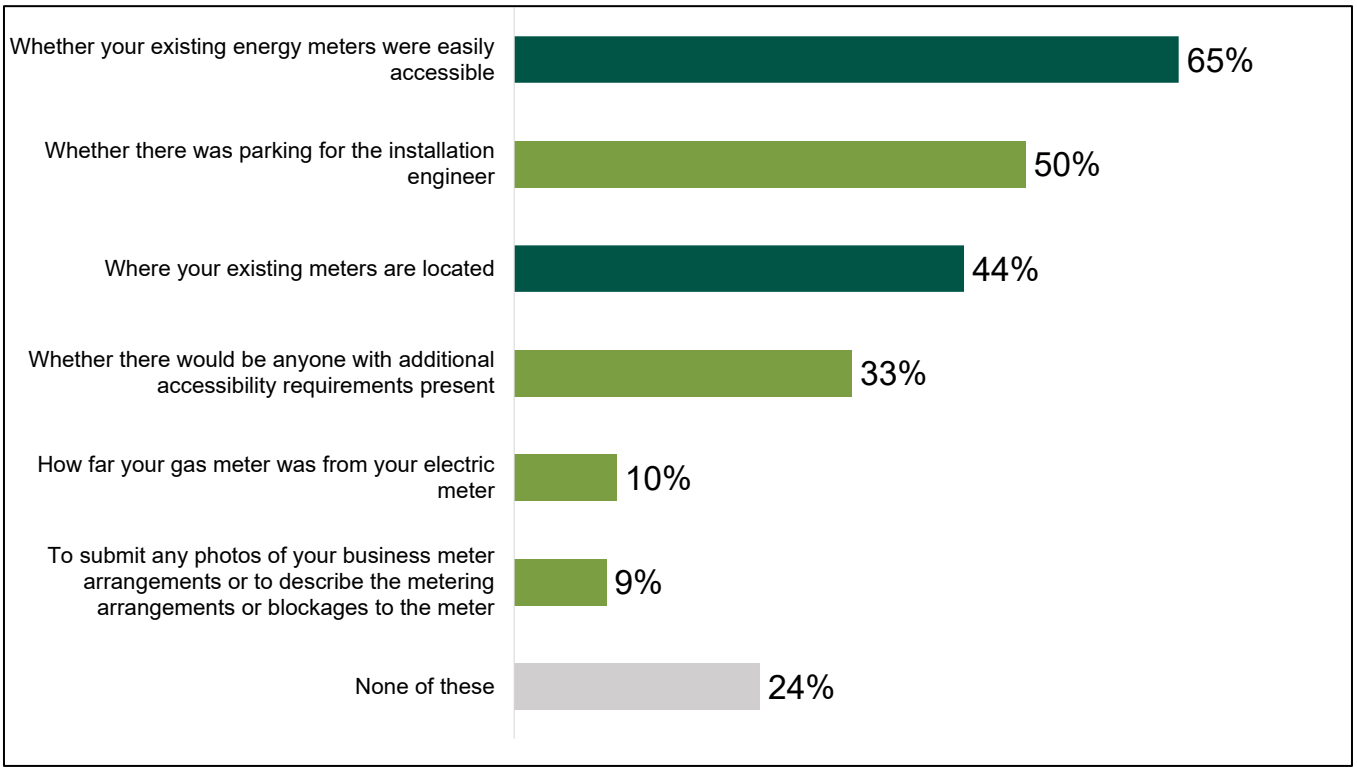
Further to this, a third (33%) of all businesses encountered problems during their booking process that would normally have made them give up if they were not participating in the research. Of those that were successful in booking a smart meter installation, 29% stated that they encountered problems that would have made them give up. Had these customers dropped out, the booking success rate would have fallen to 50%.

[14] A third party meter operator provider refers to a situation where the company that provides and undertakes the installation of the meter itself is separate from the energy supplier.

Questions asked at the booking stage

During the booking process energy suppliers may ask a number of questions related to the site to ensure installers are prepared before they arrive, including two 'good practice' questions which can be seen highlighted by the dark green bars in Figure 8.2 below). As shown, two thirds (65%) of customers were asked whether their current meter was easily accessible and over two fifths (44%) were asked where their current meters were located.

Figure 8.2. Booking questions asked to businesses



A8. Were you asked any of the following questions at the point of booking? Base (Multicode- chart will not total 100%): All businesses (78)

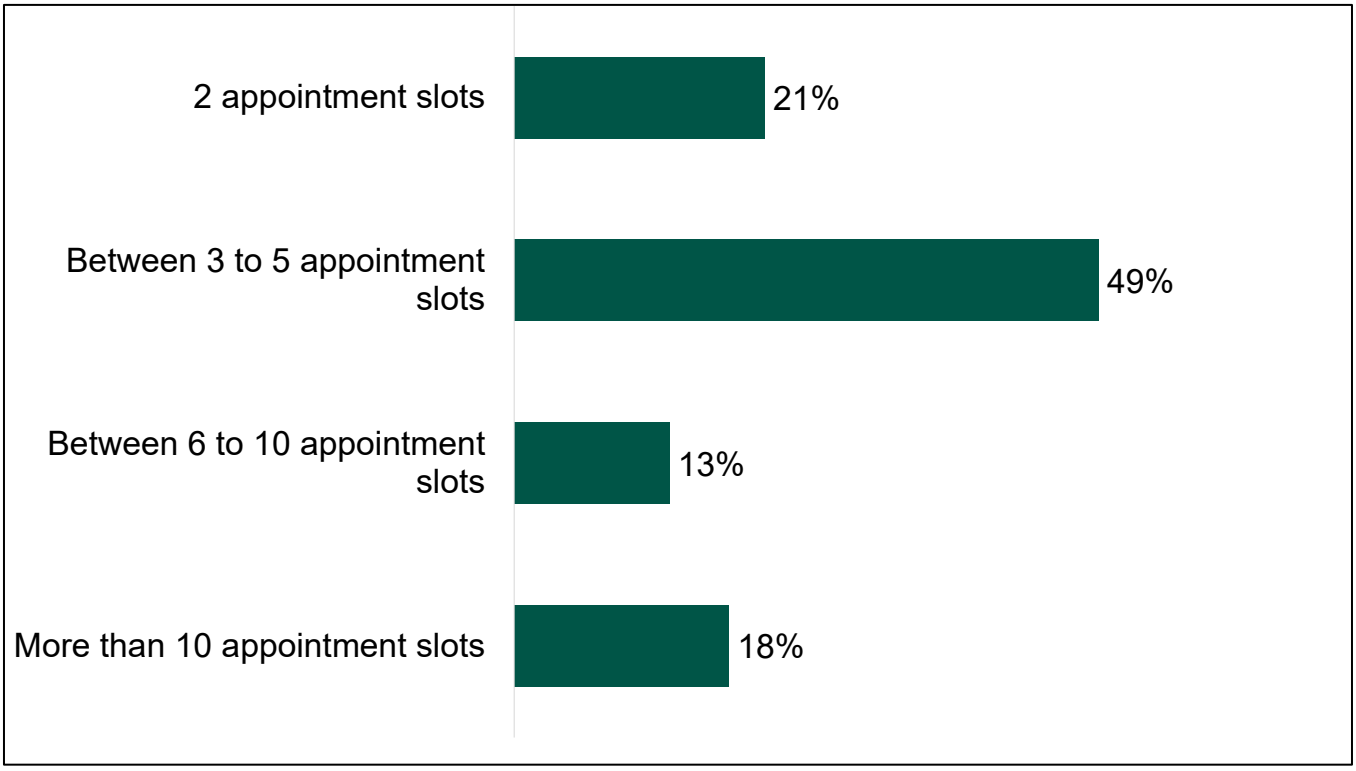
A quarter (24%) of businesses were asked one of the 'good practice' questions by their energy supplier during the booking process, whilst over four fifths (42%) of businesses were asked both of the 'good practice' questions. On the other hand, a third (33%) of businesses were asked none of the 'good practice' booking questions.

Availability of appointment slots

Nine in ten (91%) businesses who successfully booked an installation were able to book an appointment that suited them. However, it should be noted that only a minority were offered a variety of appointment types. A third (35%) of businesses were offered a choice of slots inside and outside of business operating hours whilst a fifth (20%) were offered a choice of weekend and weekday options. Over half (56%) were not provided with either of these options.

Additionally, seven in ten (71%) businesses who successfully booked an installation were offered a range of appointment slots to choose from, with the majority offered three or more appointment slots (79%), as shown in Figure 8.3.

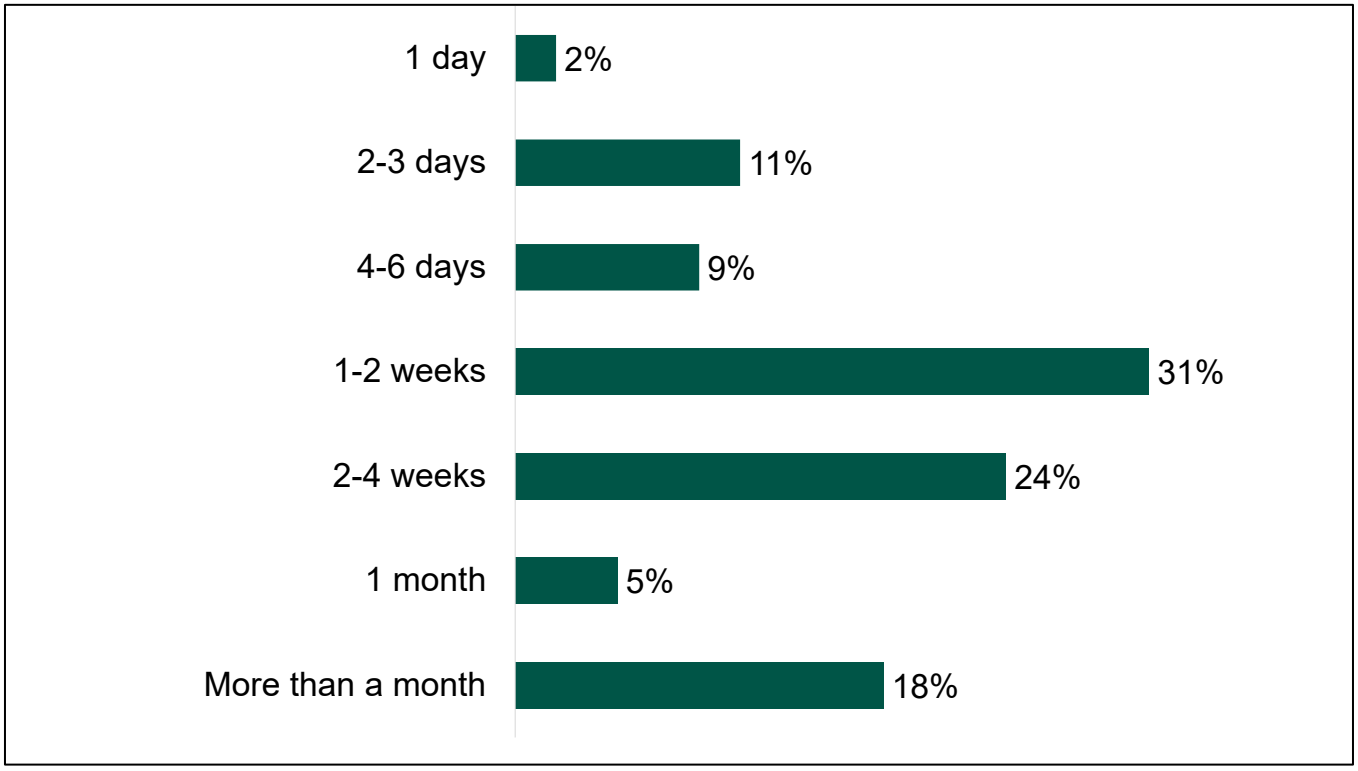
Figure 8.3. Number of appointment slots offered to businesses



A28. How many appointment slots were you able to choose from? Base: All businesses offered a range of appointment slots (39)

Similarly to domestic customers, businesses were asked when their first available appointment was from the day of their booking, with around half (53%) being able to get an appointment within 2 weeks, as seen in Figure 8.4.

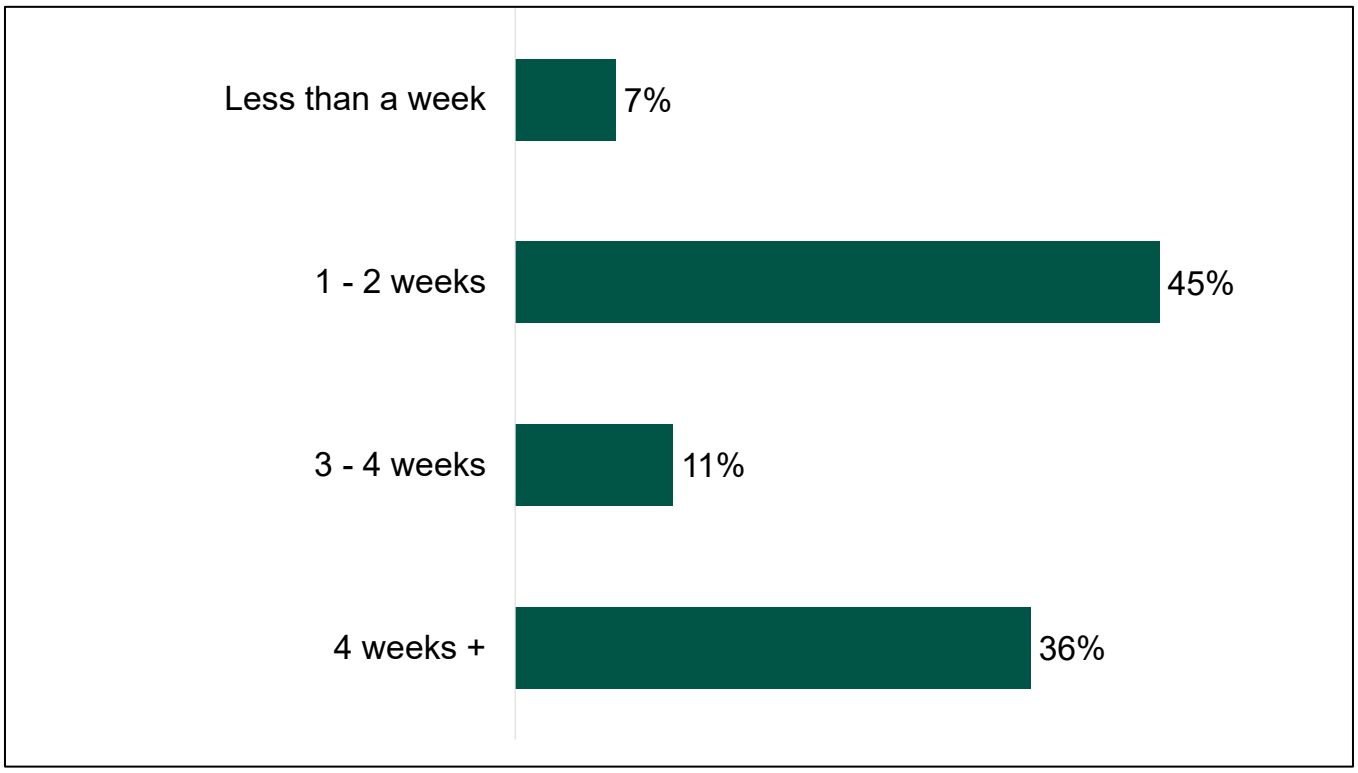
Figure 8.4 First available appointment from booking date



A30. How far away from the day you made your booking was the first available appointment? Base: All businesses who successfully booked an appointment (55)

Over half (53%) of customers were able to get a smart meter installation appointment within 2 weeks of the day of their booking, with the majority (93%) booking their appointment for at least a week away. Over a third (36%) chose to have their appointment over 4 weeks from when they booked it. From a customer perspective, this is a positive result, given figure 8.5 shows that customers have broadly shown as much desire to have appointments take place within two weeks of booking (52%) as to have appointments take place 3 weeks later or longer (47%).

Figure 8.5. When customers chose their appointment



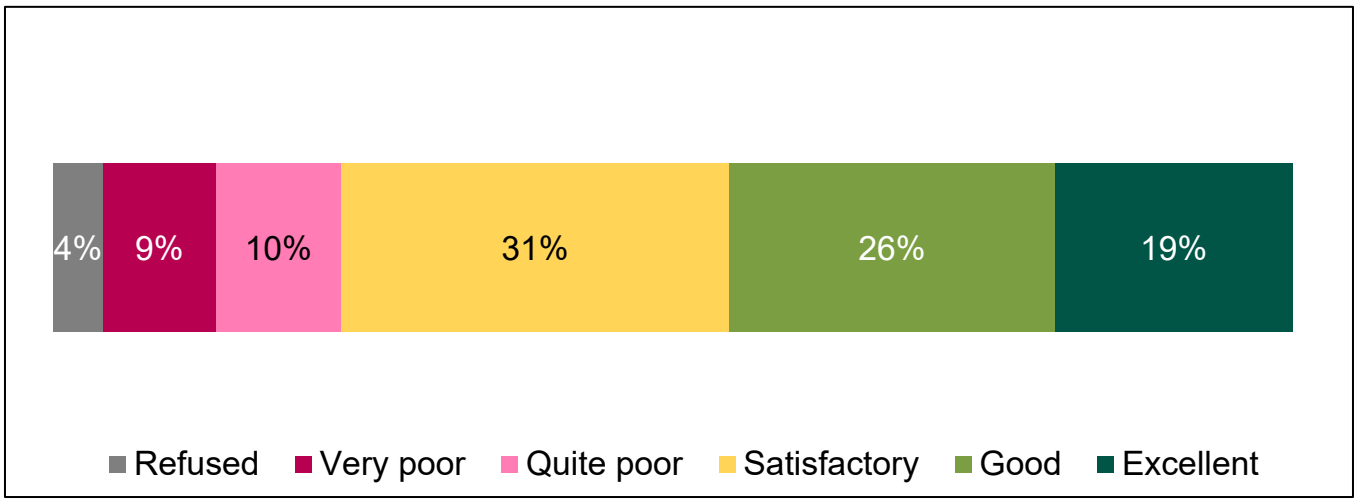
Derived variable. How long between the day you made your smart meter booking and your choice of smart meter installation appointment? Base: All those who provided a date for their booking and their installation (55)

Booking experience

Just under half (45%) of businesses rated their booking process as at least ‘good’ overall, whilst a fifth (19%) rated the process as ‘poor’. The following were more likely to rate the process as at least good:

- Just over half (56%) of businesses who had a successful booking (n=55)
- Just under half (48%) of businesses who own their premises (n=33).
- Two thirds (67%) of businesses who were given a choice of installation appointments (n=39).
- Over four fifths (83%) of businesses that were offered flexible appointments, i.e. a choice of weekend or weekday or inside or outside operating hours, rated the process as good.

Figure 8.6. Rating of booking process



A35. How would you rate the process of booking your install? Base: All businesses (78)

Of the 15 businesses who rated their process as poor, a number of reasons were provided which included:

- Unable to get an appointment (8).
- Waitlist is too long (1).
- Delays between steps or they had not heard back from the energy supplier (5).
- Poor customer service (5).
- Had to make further contact with the energy supplier (4).
- Other reasons (8).

Chapter 9: Non-domestic pre-installation

Sample: 56

This chapter presents the second stage of the customer journey, the non-domestic pre-installation stage, exploring the communications received from their energy supplier, information provided by energy suppliers at this stage and the changing of their installation appointments.

The majority (64%) of businesses who successfully booked an installation were contacted between their booking and installation by their energy supplier, with nearly all (94%) of those reporting they found the communications useful.

Information provided at this stage

Between the booking stage and the installation appointment, energy suppliers may provide businesses with standard information regarding their upcoming smart meter installation; including two ‘good practice’ statements that past rollout experience suggests can help enable a successful install (which can be seen in Figure 9.1 below). Questions regarding the ‘good practice’ statements were asked at both the booking stage and the pre-installation stage.

As seen in Figure 9.1, similarly to the domestic journey the majority of businesses were informed of multiple details regarding their installation, with the most common being that an employee would need to be present to let the installer into the premises (93%).

Figure 9.1 Information provided to businesses in advance of the install

Statement	Percentage
An employee would need to be present to let the installer into the premises [GOOD PRACTICE STATEMENT]	93%
The installer would need access to your current meter (Only asked at the pre-install stage)	91%
The electricity and gas supply would need to be turned off for a short while	85%
The booking time was a window during which the engineer could arrive and that the appointment would then be expected to last between 1.5 and 2 hours [GOOD PRACTICE STATEMENT]	70%
The area around your meter should be cleared/ensure the installer will be able to easily access your meters	73%
The energy supplier's no show policy if YOU cancel the appointment with less than 24hrs notice*	23%
You will be provided with relevant energy efficiency advice at the install or before the install*	9%
The energy supplier's no show policy if THEY cancel the appointment with less than 24hrs notice*	9%
Steps you may need to take as a renter^	9%

A1. Were you told (by the call handler or in any contact you received) any of the following details about your installation? Base: All pre-installation businesses (55) *Statements only asked at booking stage. Base: All businesses who attempted to book a smart meter (78) ^Base: Those who rented their premises (44)

Just under two-thirds (64%) were informed of both of the 'good practice' booking statements at either stage, whilst a third (33%) of customers were informed of one 'good practice' statement from the standard booking information at either the booking or pre-installation stage. Only 3% were informed of neither of the 'good practice' statements at either the booking or pre-installation stage.

Communications from their energy supplier

Just under two thirds (64%) of businesses who successfully booked an installation were contacted by their energy supplier between their booking and installation appointment. However, half (51%) of businesses did not have their appointment actively re-confirmed with their supplier, with 43% being asked to do so. It is also possible that customers received passive confirmations of their appointments that did not require a response.

Of those who received communications, the majority were contacted a minimum of two times or more (63%), whilst just under a third (31%) were only contacted once by their supplier. The majority (74%) were contacted via email, followed by half (51%) who were contacted via phone call and 29% by SMS text message. Of those who received communications between their booking and installation appointment, over nine in ten (94%) have found the communications useful.

Changing of appointments

No customers attempted to cancel their installation appointment and none were contacted by their energy supplier to cancel the installation. However, a minority (7%) of customers tried to change their appointment. Additionally, a minority (5%) of customers were contacted by their energy supplier to change their installation appointments. Of these customers, notice periods varied from between 48 hours and 5 days notice, to less than 24 hours.

Of those who tried to change their appointment, customers were split in whether they found the process easy or felt indifferent to the process; none found it difficult. There were also mixed experiences in how successful the customers were. A few were offered 2-3 new appointment slots to choose from, whilst a few others were added to a waiting list with no timeframe.

Chapter 10: Non-domestic installation

Sample: 48

This chapter presents findings from the non-domestic installation survey, predominantly focusing on whether the installation was successful or not, why some experienced unsuccessful installations, what was discussed during the installation, and customer satisfaction overall.

The majority (83%) of businesses were able to have a smart meter installed, and almost all of these said there were no issues (at least that they were aware of) during the installation. Around two fifths (42%) felt the time it took to demonstrate the smart meter was appropriate. Additionally, two fifths (41%) of businesses said they were offered a tool to check their energy usage. Energy companies will be obliged to provide free energy use information (e.g. via data access tools) to smaller businesses from October 2024. However, please note that this research predates this policy coming into effect.

Installation status and issues

Installations were on the whole largely successful and free from issues. Over four fifths were able to get a smart meter installed (83%). Of the businesses that did not have a successful installation, most had their installer arrive and were informed why it could not be installed, but for some the installer did not give a reason. An additional few reported that their installer did not arrive, of which a couple were informed ahead of time of this whilst one was not.

Reasons given for an unsuccessful installation included: additional works were required at the property; the installer did not have the particular skills for the installation's requirements; the energy supplier had to rearrange the appointment; and, in one instance, the third-party installer had been given the wrong address by the energy supplier.

Only some businesses without a successful installation were given alternative appointments. For the remaining businesses, a few had issues preventing future installation, while others were not provided a reason as to why installation would not be possible.

Three quarters of all businesses (75%) reported that the installer had called ahead of time to inform them of their arrival time.

As with domestic customers, installations most commonly lasted between 30 minutes and 2 hours (90%), aligning with the expected timeframe: generally, a single fuel install takes around an hour and a dual fuel install around 2 hours. Less than one in ten (8%) reported the install lasted longer than 2 hours.

Three quarters (75%) of those with a successful installation reported no issues during the install process. A fifth (20%) said they did not know if there were any issues during the process.

Only a small number of businesses (6%) reported known issues during installation. One reported that the electricity meter was not working as smart, while another said that both the electricity and gas meters were not working as smart. In both cases, the businesses needed to continue submitting readings manually. Of these businesses, one was informed that the issue would be fixed remotely, while another was not informed of any next steps.

Information provided

As with domestic customers, it is expected that energy suppliers provide information about how business energy data will be collected. At the installation stage, a few customers were told of how frequently their data would be collected. However, many had already received this information at this stage. Over two-thirds (69%) of businesses that had a successful installation were informed of how frequently their energy supplier would collect data from their smart meter at some stage in the user journey. Similarly, across the research, 58% were informed of the purpose.[15]

Of the 23 micro businesses that had a successful installation, 16 were informed of this at some stage, with one business being informed of this at the installation stage.

Of those businesses with a successful installation, 26% were offered energy saving advice at some stage of the journey, with 7% being offered energy saving advice at the installation stage. Eight microbusinesses were offered energy saving advice at previous stages of the journey, but none were offered it at the installation stage.

Under a fifth (18%) of those who had an installer visit the business said they were provided supporting materials during the installation. These were most commonly an information booklet about the smart meter, but also included an unspecified leaflet. Few businesses reported being signposted to any additional support regarding energy saving.

Energy companies will be obliged to provide free energy use information (e.g. via data access tools) to businesses from October 2024. However, this research predates this policy coming into effect.[16] Around two fifths (42%) of businesses with a successful installation said they were provided with such a tool. Of these 16 businesses, 14 said the tool was offered free of charge, while the other 2 could not recall. The same number (14) also agreed that that the instructions on how to use the tool were clear, while 1 disagreed.

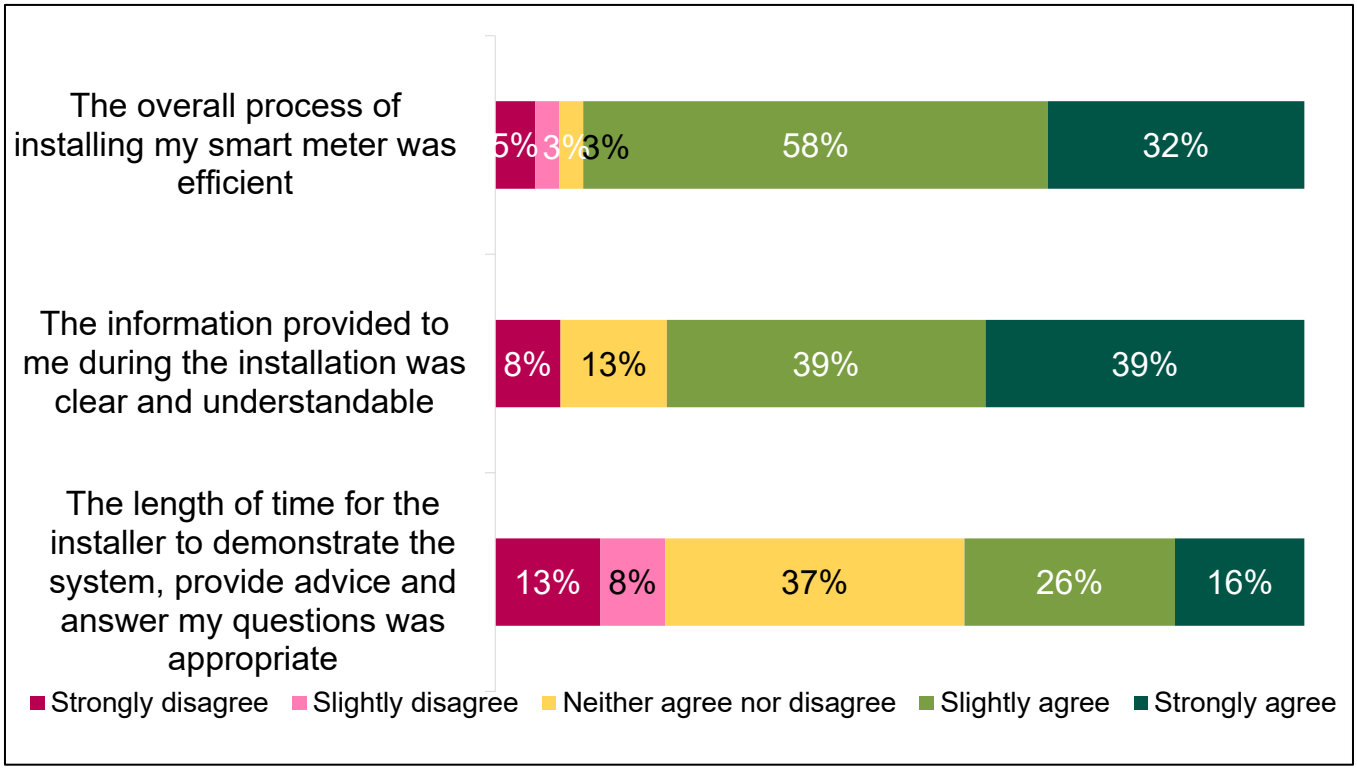
[15] Please note that at the pre-installation stage, respondents were asked whether they had been told about the frequency and purpose of data collection within the same question. At that point, 49% noted that they had been informed of these two points by that stage of the customer journey (45% of which stated they were told this at the booking stage).
[16] thttps://www.gov.uk/government/consultations/maximising-non-domestic-smart-meter-consumer-benefits-improving-the-data-offer-and-enabling-innovation)

Of those who had successfully had a smart meter installed, a fifth (21%) said they were made aware of their right to nominate third party access to their smart meter data, whilst a quarter (26%) were made aware of their right to request their smart meter consumption data for free.

Installation satisfaction

Satisfaction at this stage of the user journey was generally high. As shown in Figure 10.1, nine in ten (89%) businesses with a successful installation felt the overall process of installing the smart meter was efficient, while almost four fifths (79%) agreed that the information provided to them was clear and understandable. However, only two fifths (42%) agreed that the length of time it took for the installer to demonstrate the system, provide advice, and answer any questions was appropriate.

Figure 10.1 Views on different aspects of the installation

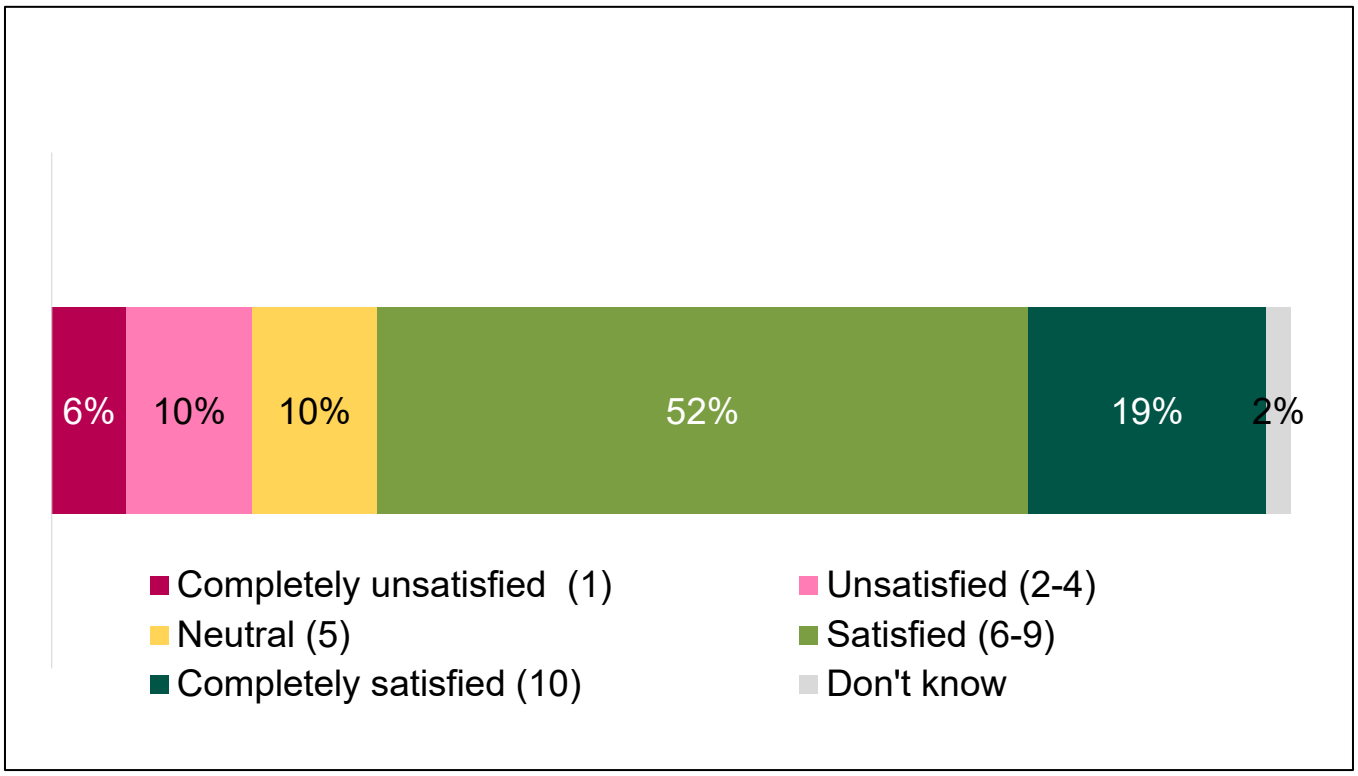


A20, A22. & A33. To what extent do you agree that…? Base: All non domestic customers who had a successful electricity smart meter installation with no issues (38)

Nearly three quarters (71%) of all businesses were satisfied with their installation experience. Those satisfied included:

- 20 of the 30 micro businesses, and 10 of the 13 non-micro businesses.
- 19 of the 25 businesses who rented their premises.
- 14 of the 22 businesses who owned their premises.
- 8 of the 12 businesses in Southern England; 8 of the 12 businesses in the Midlands; 11 of the 15 businesses in Northern England.

Figure 10.2 Satisfaction with installation experience



A35. On a scale of 1-10, with 10 being completely satisfied and 0 being completely unsatisfied, how satisfied were you with your experience? Base: All non domestic customers who attempted to have a smart meter installed (48)

Chapter 11: Non-domestic post-installation

Sample: 35

This chapter presents findings from the non-domestic post-installation survey, predominantly focusing on how customers have checked their energy consumption data, issues that have arisen since having the smart meter installed, as well as presenting findings on overall satisfaction.

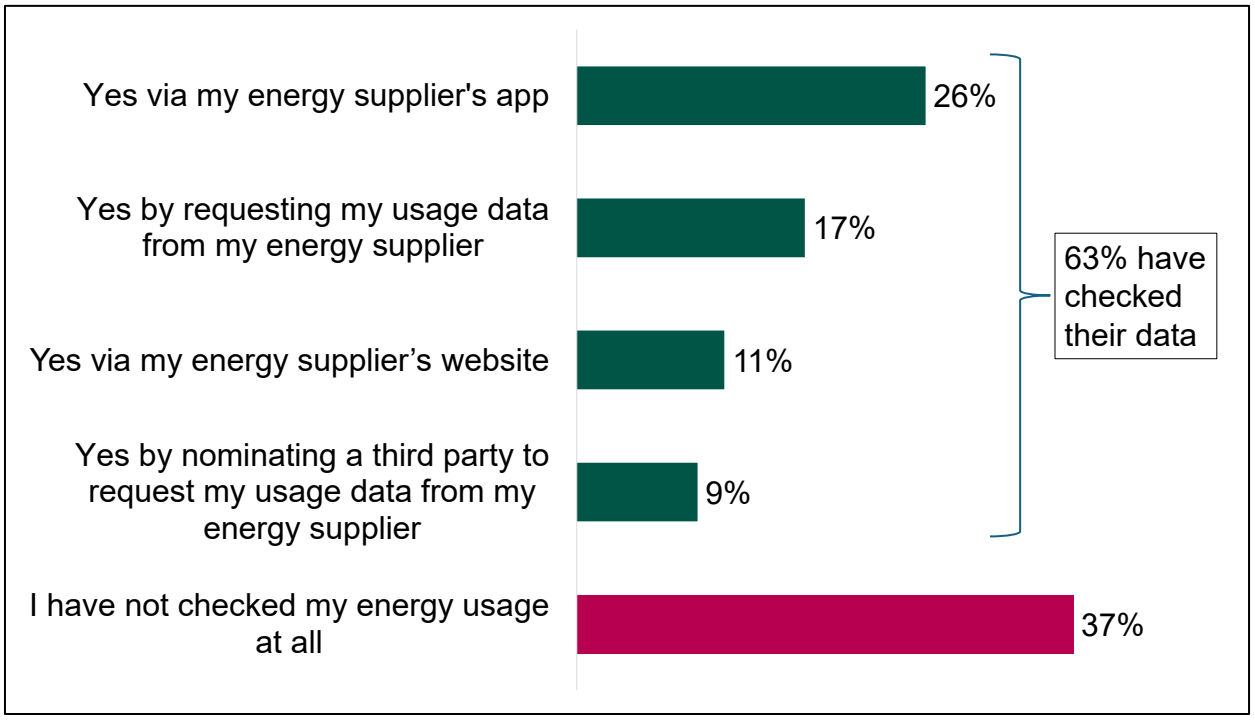
Since installation, over half (63%) of businesses had checked or requested their energy usage data, and most felt confident they could keep track of their consumption usage (80%) and use this data to reduce their usage in the future (72%). Only a small minority (14%) reported issues with their meter, and this usually related to problems checking their data.

Ultimately, the majority (74%) were satisfied with their smart meter, and would recommend one to colleagues or other businesses (80%). Most (80%) were also satisfied with the overall journey of getting their meter installed.

How customers checked their data

The majority of businesses were keen to check their energy use. As Figure 4.1 indicates, just under two thirds (63%) of those with a working smart meter at install had accessed their energy data since installation, most commonly via the energy supplier's app (26%).

Figure 11.1 Access of smart meter usage data



A5. Have you accessed your energy usage data from your smart meter in any way since installation? Base: All non domestic customers with a working smart meter (Multicode- chart will not total 100%) (35)

Of those who had checked or requested their energy usage data, the majority found it easy to do so. All 13 businesses that checked their energy usage via a tool found it easy, with 8 finding it ‘very easy’. Of the businesses who had requested their data from their energy supplier, almost all found it easy, with only a few businesses feeling indifferent or finding it difficult.

The most common reason for not planning to check or request energy usage data in the future was that businesses did not think it made a difference to their energy consumption. Other reasons included the business not having the time; them not finding the data useful; or not understanding the data.

Issues faced by non-domestic customers

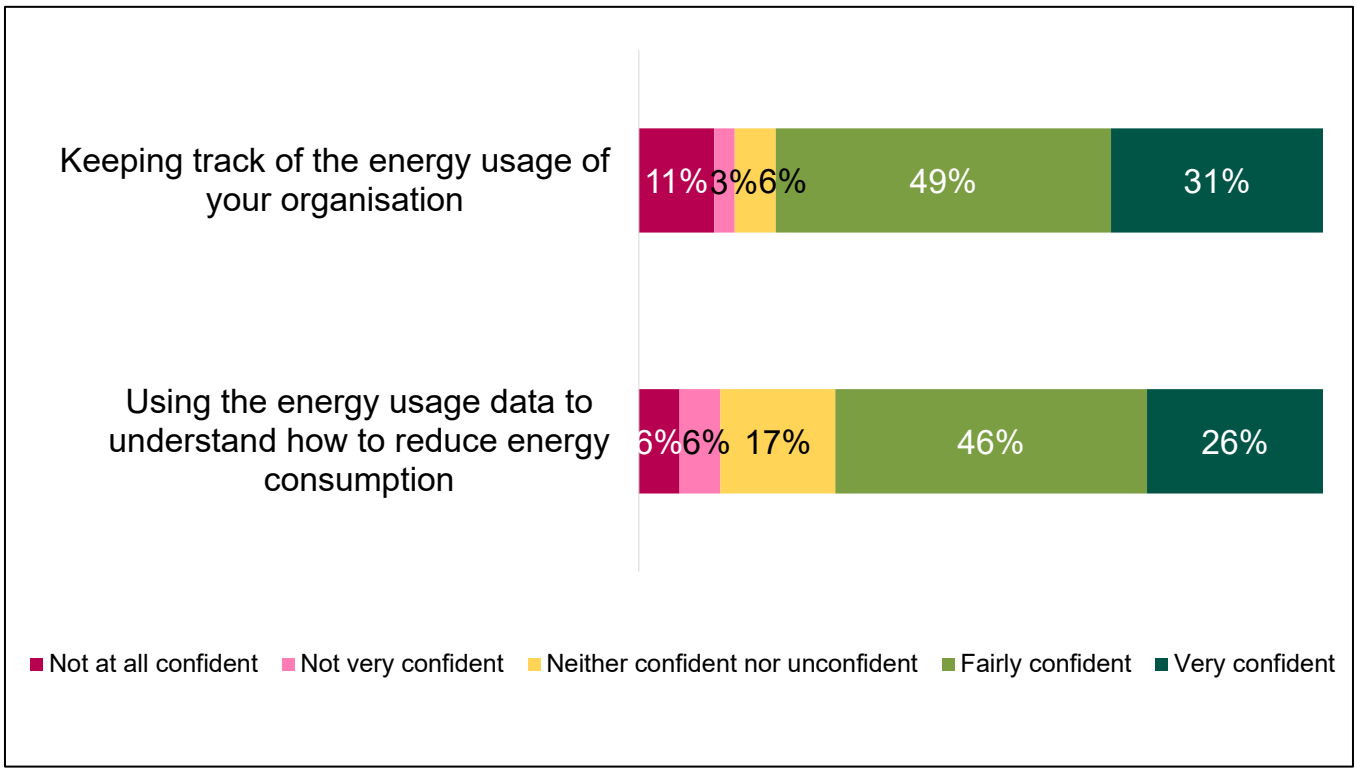
Nearly nine in ten (86%) of businesses reported experiencing no issues since having their smart meter installed. Each of the businesses that experienced an issue reported a different problem, mostly around receiving incorrect information regarding their usage. Of those that contacted their energy supplier to try and resolve the issue, around half were able to get them resolved.

Behavioural changes

Businesses generally demonstrated a greater awareness of their energy consumption and confidence in reducing it since having a smart meter installed.[17] As shown in Figure 11.2, four fifths (80%) of all businesses with a working smart meter said they felt confident keeping track of their energy usage, with nearly a third (31%) saying they felt ‘very confident’. Of those that had checked their data, almost all of them (21 out of 22) said they were at least fairly confident of keeping track of their usage. Alternatively, for those that had not checked their data, 7 out of 13 agreed. Nearly three quarters (72%) felt confident using their energy usage data to better understand how to reduce their energy consumption. Again, for those that had checked their data, there was a similarly more positive result, with 21 out of 22 stating they were at least fairly confident they could use the data to understand how to reduce energy consumption. Alternatively, for those that had not checked their data, 5 out of 13 were at least fairly confident.

[17] Please note that 63% were offered a tool to check their usage or requested their energy usage. Whilst there are other means with which non-domestic customers can check their usage, it should be noted that these are self-reported behaviour changes so are subject to potential biases.

Figure 11.2 Confidence with energy usage data

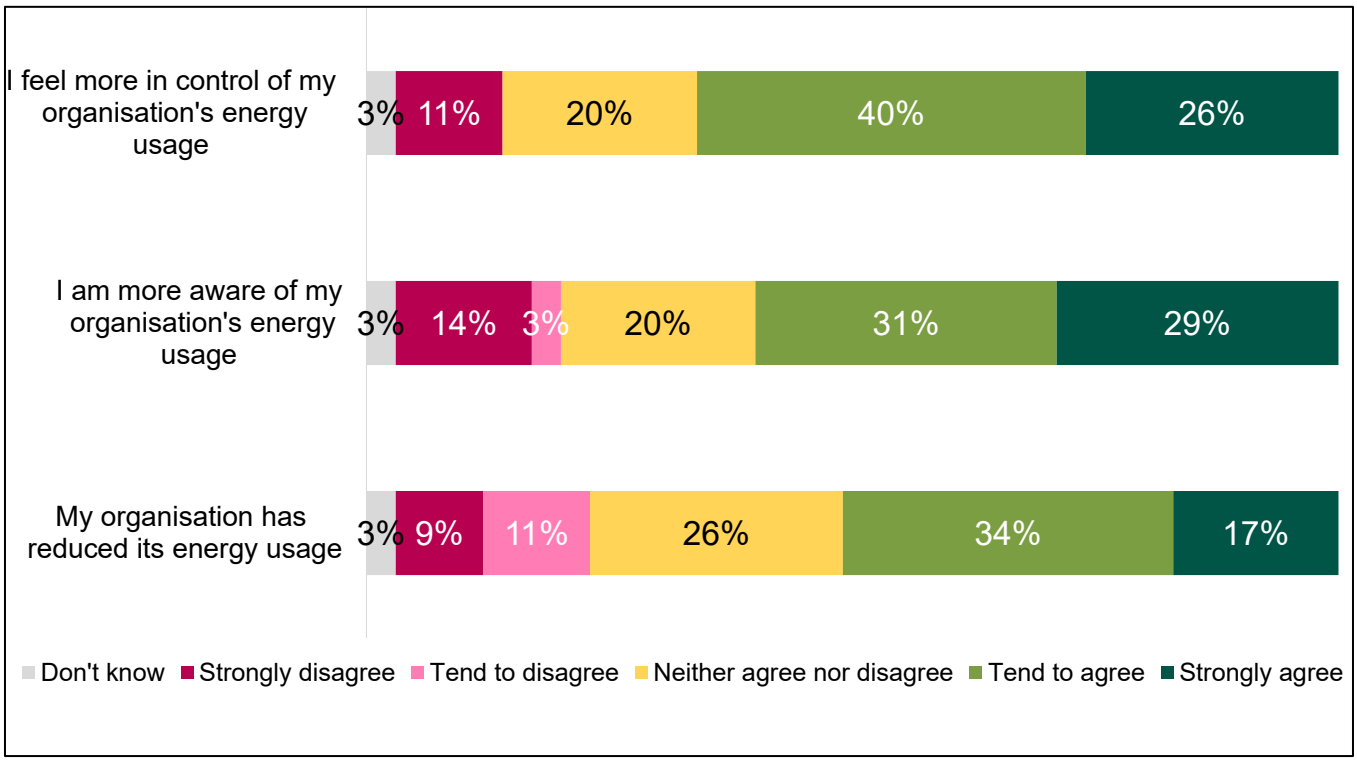


C2 & C4. How confident are you in…? Base: All non-domestic customers with a working smart meter (35)

As shown in Figure 11.3, two thirds (66%) of all businesses with a working smart meter agreed that they felt more in control of their energy usage since having a smart meter installed (66%). Of those that had already checked their data, 18 out of 22 agreed that they felt more in control, whilst for those that had not checked their data, 6 out of 13 agreed. Three fifths (60%) agreed that they were more aware of their energy consumption. Similarly to the previous statement, of those that had already checked their data, 18 out of 22 agreed that they were more aware of their energy consumption, compared to those that had not checked their data, where 4 out of 13 agreed.

Half (51%) agreed that the organisation had reduced its energy usage since installation with a fifth (20%) disagreeing. However, it should be noted that they would have only had their smart meter for about a month at this point. Additionally, of those that had already checked their data, 17 out of 22 agreed that they had reduced their usage, whereas only 2 out of 13 of those that had not checked their data agreed.

Figure 11.3 Agreement with below statements

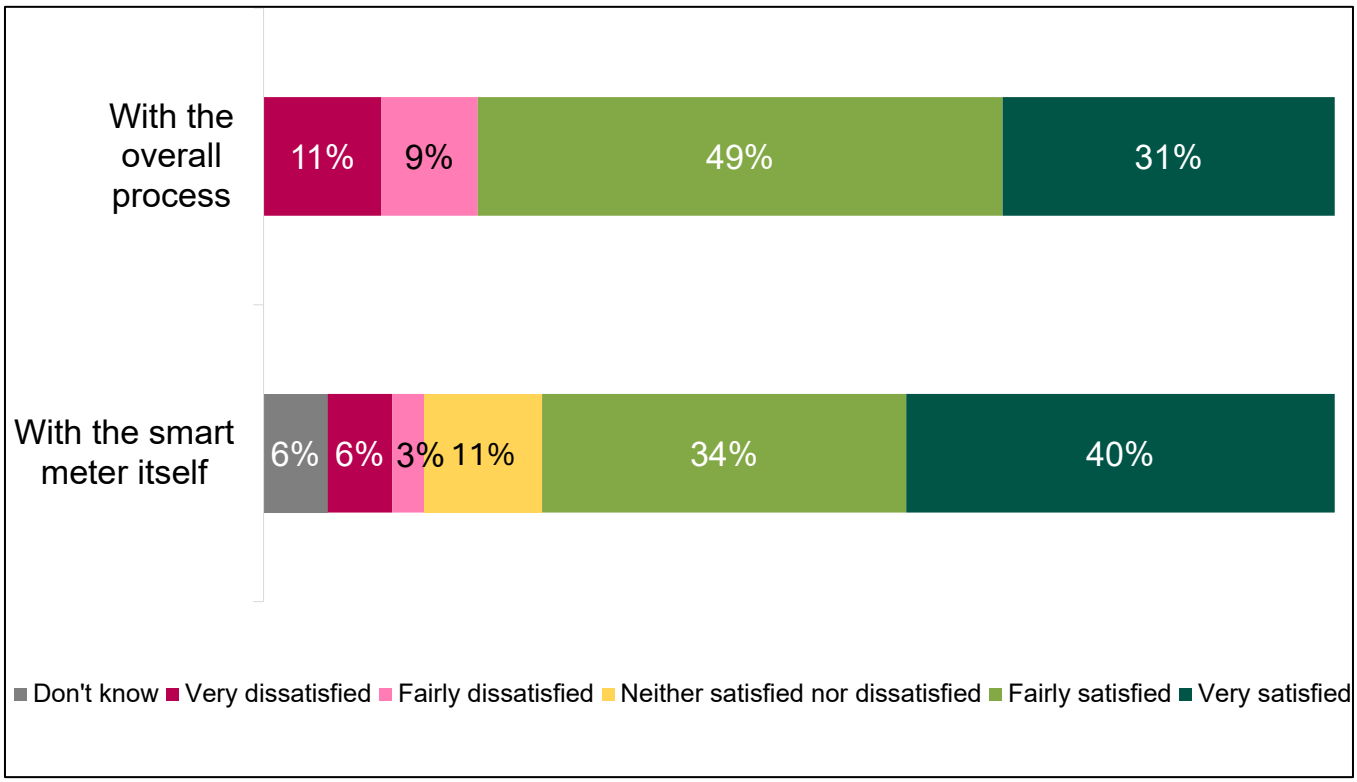


C8. Since installing your smart meter, to what extent do you agree that…? Base: All non domestic customers with a working smart meter (35)

Overall satisfaction

Once again, satisfaction at this stage of the journey was high. Four fifths (80%) were satisfied with the overall installation process. Similarly, three quarters (74%) of businesses said they were satisfied with the smart meter itself.

Figure 11.4 Satisfaction with smart meter and overall process



D6/D7. How satisfied are you…? Base: All non domestic post-install customers (35)

When asked on a scale of one to ten how much they would recommend a smart meter, four fifths (80%) said they would recommend a smart meter to colleagues or other business owners, with a third (31%) saying they would ‘definitely’ recommend one. Alternatively, 17% would not recommend getting a smart meter, with 9% stating they would definitely not recommend getting a smart meter.

Chapter 12: Non-domestic conclusions

The non-domestic smart meter installation journey is broadly positive. Most were able to book their smart meter installation (71%) and a similar percentage (83%) were able to have their smart meter installed. However, after accounting for those that would have given up had it not been for the research, the success rate for booking would have dropped to half (50%).

The booking stage proved to be the most challenging aspect of the journey. Nearly three out of ten (29%) non-domestic customers were unable to book an installation. Similarly, customers reported not being offered a flexible range of appointment times: only a third (35%) were offered a choice of appointments inside or outside work hours and even fewer (20%) were offered a choice of weekday or weekend appointments. Offering customers greater flexibility could help minimise disruption. For those that were able to book a smart meter, the majority (91%) were happy with the appointment slots offered to them. However, the lack of flexibility may have been why some were unable to book, given that several flagged that 'none of the appointment slots were suitable for me' as a reason why they could not get a smart meter installation booked.

Additionally, a minority (42%) of customers were asked the 'good practice' questions at this stage, meaning a large proportion of businesses were not being asked to provide key information at this stage of the customer journey, such as how accessible their meter is. These challenges are reflected in the overall satisfaction scores for the booking process, with less than half (45%) stating that their experience with the booking process was "good" or "excellent". That increases to 56% for those that were able to successfully book their smart meter installation.

Non-domestic customers were generally supplied with the information needed in the period leading up to their installation. At the pre-installation stage, the majority (64%) of businesses who successfully booked an installation were contacted between their booking and installation by their energy supplier, with nearly all (94%) of those reporting they found the communications useful. This does mean that over a third (36%) were not sent any communications that were deemed useful by those that received them. Additionally, under half (51%) of businesses did not have their appointment actively re-confirmed by their energy supplier.

The installation stage for businesses was broadly positive, with over four fifths having a successful installation (83%). This means that just under a fifth (17%) of non-domestic customers who had successfully booked an appointment were unable to get their smart meter installed. Non-domestic customers generally agreed that the process of installation was efficient (89%) and the information they were provided was clear and understandable (79%). The key area of concern was that only a minority (42%) of non-domestic customers agreed that the length of time the installer spent demonstrating the system, providing advice and answering questions was appropriate. Of those that did have a successful installation, a

minority (6%) noted issues with their smart meter not functioning properly and they would need to continue to submit readings manually.

Installation satisfaction was substantially higher than at the booking stage, with 71% of non-domestic customers stating they were satisfied with the process (while this was a similar percentage to the rate of successful installations, not all who had a successful install reported they were satisfied).

For the final stage of the journey, a majority (63%) of businesses had checked or requested their energy usage data, and most demonstrated having greater confidence in managing their usage (66% feeling more in control of their energy usage and 60% more aware of their energy usage). Only a small minority reported issues with their meter (14%), and this usually related to problems checking their data. Most importantly, the majority (74%) were satisfied with their smart meter and would recommend one to a friend or colleague (80%). A similar proportion (80%) was also satisfied with the overall journey of getting their smart meter installed.

Chapter 13: Comparisons between domestic and non-domestic customer experiences

Generally, both domestic and non-domestic customers have experienced similar journeys. For both domestic and non-domestic customers, booking a smart meter installation was where the most challenges were faced by customers, with only around half reporting that their booking experience was ‘good’. Satisfaction levels were higher at later stages, but across all of the satisfaction questions, non-domestic customers were less satisfied than domestic customers.

Booking Stage

At the booking stage, a minority of both domestic and non-domestic customers were unable to book their smart meter installation (27% for domestic customers and 29% for non-domestic customers). Both audiences were offered a range of appointments including within a week of the booking date as well as a month after the booking date. However, a greater proportion of businesses chose to have their appointment take place more than 4 weeks after making the appointment (36% compared to 28% of domestic customers).

Whilst the booking stage was where both customer types had their lowest satisfaction levels, domestic customers were more satisfied than non-domestic customers (54% good for domestic and 45% good for non-domestic).

Pre-install Stage

Communication with their supplier was generally positive: for example, the majority of both customer types (69% domestic and 64% non-domestic) were contacted between their booking and their installation; meanwhile only a minority were asked to change their appointment (2% domestic customers and 5% non-domestic customers).

Install Stage

While both customer types typically had successful experiences at the smart meter installation stage, the research indicates that domestic customers generally reported a more favourable experience. For example, 89% of domestic customers were able to get their smart meter installed compared with 83% of non-domestic customers; meanwhile 78% of domestic customers reported they were satisfied with the installation experience compared with 71% of non-domestic customers.

When looking at receiving energy saving advice, a quarter (26%) of businesses who had a successful installation were offered energy saving advice, compared to two fifths (41%) of domestic customers who recalled receiving energy saving advice during their installation.

Post-install Stage

Finally, both domestic and non-domestic customers have reported greater confidence in understanding their energy usage and a general satisfaction with the smart meter itself. Across the various behaviours, most of domestic and non-domestic customers agreed that they are more energy aware and more confident about making energy related decisions. There is also a similar positive response from domestic and non-domestic customers, although slightly more positive for domestic customers, regarding their rating of the smart meter (86% domestic to 74% non-domestic), the overall journey of getting a smart meter (85% domestic to 80% non-domestic), and whether they would recommend a smart meter (82% domestic to 80% non-domestic).

Annex 1: Recruitment approach

Recruitment commenced in August 2023, with the final surveys occurring in February 2024. Recruitment was designed to occur over two phases:

- The first recruitment phase ("**registration**") utilised a range of online research panels, mystery shopping companies, specialist recruitment agencies, business databases as well as snowballing techniques[18] to identify individuals and businesses who were eligible for a smart meter installation and had not previously had one installed. Potential participants were informed of the broad research process and what would be expected of them, before capturing their interest in taking part. This phase also captured demographic or firmographic information.
- Once potential participants had registered interest in the process, the second phase ("**confirmation**") entailed explaining in more detail what their inclusion in the research would entail. This enabled potential participants to make a more informed decision about whether or not to take part. At the end of this phase, if participants confirmed their decision to take part, they were provided information about how to request a smart meter installation and asked to proceed with contacting their energy supplier to achieve this.

Maximising response

IFF Research in partnership with the aforementioned sample providers contacted participants via email and text throughout the process, to encourage response and check if participants needed any assistance with the research. IFF Research also undertook telephone calls to remind participants to complete their surveys.

While domestic and most non-domestic smart meters are available for installation at no additional cost, given the number of surveys involved, and the effort asked of participants, the research offered a financial incentive to encourage participation. These ranged in size depending on the type of consumer (domestic vs. non-domestic), the sample provider they were sourced from, and the number of survey stages they completed.

Recruitment challenges

Good sample sizes for both domestic and non-domestic customer journeys were achieved. However, for both the domestic and non-domestic sides of the research, the proportion of participants agreeing to take part in the research, and then completing the first stage was lower than expected.

[18] Snowballing refers to a method of sampling in which participants are recruited through referrals from other participants.

The first challenge was that 62% of meters are now smart (at the time of the research) and so our research was targeting the subset of customers that did not yet have smart meters. Additionally, there was not a list of non-smart owners available to pinpoint, meaning that identifying eligibility was a key part of the recruitment process.

Additionally, this was high-burden research, and so a high level of dropout was expected. The domestic strand had a higher dropout rate through the installation journey surveys than anticipated. It was assumed that there would be some natural drop out due to customers not being able to book an appointment, and as a result of the research taking place over a period of time (to allow installations to be booked and carried out).

For the non-domestic strand, whilst the above progression issues were present, there were other issues present. The main barriers related to fears of business disruption, especially given the intensity of the research and what was required of them.

A number of actions were taken to mitigate these challenges. These included:

- Increasing the resource given to telephone chasing, particularly to encourage those who had initially registered their interest but not gone on to book a smart meter.
- Combining the registration and confirmation stages of recruitment to streamline the process for participants.
- Adjusting email invites to emphasise the benefits of smart meter installations.
- Enlisting the support of a range of non-domestic industry bodies to disseminate the research through their communication channels.
- Extended the fieldwork window to allow more participants to complete the customer journey for getting a smart meter installed.

Annex 2: Demographic and Firmographic Tables

Tables provide a breakdown of the sample by demographics for the domestic sample and firmographics for the non-domestic sample. Counts under three have been suppressed or combined with other categories. Counts may not sum to the total sample where there was missing or incomplete demographic or firmographic data.

Domestic Sample: Demographic Tables

Table 1: Domestic sample by gender

Gender	Percentage	Number
Male	43%	117
Female	55%	151
Other/ prefer not to say	2%	4

Table 2: Domestic sample by age

Age	Percentage	Number
18-34	21%	57
35-44	26%	70
45-54	22%	61
55-64	21%	57
65+	6%	17
Prefer not to say	4%	12

Table 3: Domestic sample by whether participant has a long-term health condition or disability

Person with long-term health condition or disability	Percentage	Number
Yes	23%	62
No	74%	202
Prefer not to say	4%	10

Table 4: Domestic sample by tenure

Tenure	Percentage	Number
Own the home	70%	191
Rent from Local Authority/ Council or shared housing association	12%	33
Rent from private landlord	18%	50

Table 5: Domestic sample by household income

Household Income	Percentage	Number
Up to £25,000	23%	62
Between £25,000 and £49,000	32%	87
Between £50,000 and £99,000	29%	80
£100,000 or more	9%	25
Prefer not to say	7%	20

Table 6: Domestic sample by region

Region	Percentage	Number
Southern England	20%	56
Midlands	23%	62
Northern England and Yorkshire	20%	55
London	22%	60
Devolved nations	15%	41

Table 7: Domestic sample by payment method for energy

Payment method	Percentage	Number
Credit	88%	242
Pre-payment	11%	31

Non-Domestic Sample: Firmographic Tables

Table 8: Non-Domestic sample by size of business

Size	Percentage	Number
Micro	68%	53
Non-micro	24%	19

Table 9: Non-Domestic sample by ownership

Ownership	Percentage	Number
Owns premises	43%	33
Rents premises	56%	44

Table 10: Non-Domestic sample by single or multi-site

Site	Percentage	Number
Single	79%	62
Multi-site	21%	16

Table 11: Non-Domestic sample by sector

Sector	Percentage	Number
Agriculture, Forestry, Fishing, Mining, Water	-	≤3
Manufacturing	-	≤3
Construction	10%	8
Retail or Wholesale	28%	22
Transport and storage	-	≤3
Finance, Insurance, Real Estate	-	≤3
Business and Other services	12%	9
Hospitality, Catering or Leisure Services	31%	24
Education	5%	4
Religious organisation	-	≤3
Human health / social care	-	≤3

Table 12: Non-Domestic sample by region

Location	Percentage	Number
Southern England	28%	22
Midlands	21%	16
London	23%	18
Northern England and Yorkshire	18%	14
Devolved Nations	10%	8