UK Government

Non-Domestic Smart Meter Consumer Segmentation Phase 2: Research into ideas for driving smart meter uptake in the non-domestic sector – Technical Annex

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Appendix A

Quantitative research phase three – sample breakdown

Table 1. Sample breakdown

		Unweighted base n=
Total		800
Turnover (private sector businesses only)	Less than £2M	412
	Between £2M and £25M	257
Business Size	Micro (Up to 9 employees)	221
	Small (10-49 employees)	352
	Medium (50-249 employees)	227
Sector	Private Sector	669
	Public Sector	131
Smart meters status	All energy meters are traditional (non-smart meters)	382
	Some meters are smart meters, some are traditional	388
	Not sure	30
Segments	No risks and cost conscious	63
	Profit focussed and instinctual	61
	Tried and tested	130
	Techy and Innovative	371
	Analytical and sustainable	175

Appendix B

Supplementary tables

The following tables include data from throughout the report that is not already supported by a chart/ table. Significance testing within the sub-groups is denoted by arrows (↑ significantly higher and ↓ significantly lower) at the 95% confidence level.

Please note that any data with a base size below 30 has been removed from the tables.

Table 2. Awareness of smart meters for businesses by segment

	Column %	Total	Techy and Innovative	Analytical and Sustainable	Profit Focussed and Instinctual	Tried and Tested	No Risks and Cost Conscious
Wave three	Yes	73%	75%	72%	89%	64%	70%
	No	27%	25%	28%	11%	36%	30%
	Column n	800	371	175	61	130	63
Wave two	Yes	79%	81%	78%	80%	66%	88%
	No	21%	19%	22%	20%	34%	12%
	Column n	800	371	175	61	130	63

Table 3. Seek/accept pre-idea scores by business size and if they have a smart meter at home

Column %	Total	Micro - (Up to 9 employees)	Small - (10-49 employees)	Medium - (50-249 employees)	Smart meter at home	No smart meter at home
Seek	41%	35% ↓	48%	59% ↑	59% ↑	28% ↓
Accept	18%	18%	19%	18%	19%	18%
Indifferent	21%	24% ↑	17%	15%	13% ↓	27% ↑

Unlikely	19%	23% ↑	17%	9% ↓	10% ↓	28% ↑
NET: Seek and accept	60%	53% ↓	67% ↑	77% ↑	78% ↑	46% ↓
NET: Indifferent and Unlikely	40%	47% ↑	33% ↓	23% ↓	22% ↓	54% ↑
Column n	800	221	352	227	399	385

Table 4. Reasons for having a mixture of smart meters by business size

Column %	Total	Micro - (Up to 9 employees)	Small - (10-49 employees)	Medium - (50-249 employees)	Public sector	Private Sector
Our energy supplier wasn't able to upgrade all of our meters to smart/ advanced, so some are still not smart	42%	42%	47%	39%	47%	43%
We inherited our existing smart/ advanced meters rather than arranging the installation ourselves.	34%	33%	33%	38%	41%	32%
We prioritised upgrading meters with the highest load/ consumption	20%	12%	22%	31% ↑	22%	20%
It was too inconvenient to upgrade all of our meters in one go	18%	19%	19%	15%	14%	19%
It was too costly to upgrade all of our meters in one go	9%	12%	3% ↓	10%	10%	9%
Other	2%	2%	2%	0%	2%	2%
Don't know	4%	5%	3%	2%	0%	5%
Column n	388	62	177	149	58	324

Table 5. Has your business/ organisation been offered a smart meter by your energy supplier before?

Has your business/ organisation been offered a smart meter by your energy supplier before	%
Yes	33%
No	52% ↑
I can't remember	15% ↓
Column n	800

Table 6. Thinking about your business/ organisation, are any of the energy meters that are installed smart meters or advanced meters? by segment – wave two data

Column %	Total	Techy and Innovative	Analytical and Sustainable	No Risks and Cost Conscious	Professional and competent	Tried and Tested
Yes, some of the energy meters are smart/advanced, some are traditional (non-smart)	32%	48% ↑	55% ↑	19% ↓	15% ↓	17% ↓
No, all energy meters are traditional (non-smart) meters	61%	47% ↓	40% ↓	74% ↑	77% ↑	67%
I'm not sure	8%	5%	5%	7%	8%	16% ↑
Column n	705	205	132	108	128	132

Table 7. Number of sites by segment

Column %	Total	Techy and Innovative	Analytical and Sustainable	No Risks and Cost Conscious	Professional and competent	Tried and Tested
Single site	70%	53% ↓	58% ↓	85% ↑	78% ↑	81% ↑
Multi site	30%	47% ↑	42% ↑	15% ↓	22% ↓	19% ↓
Column n	705	205	132	108	128	132

Table 8. Reasons for rejecting the offer of a smart meter installation by business size

Column %	Total	Micro - (Up to 9 employees)	Small - (10-49 employees)	Medium - (50-249 employees)
I was too busy to deal with it at the time	24%	20%	26%	32%
I didn't see the benefit of a smart meter over a traditional energy meter	27%	30%	32%	14% ↓
It was difficult to arrange a convenient time for the engineer to come and install it	24%	23%	26%	23%
I couldn't turn the electricity and gas off to facilitate the installation as it is critical that we always have an uninterrupted energy supply	12%	6% ↓	17%	24% ↑
There was a charge for the installation that I wasn't willing to pay	12%	6%	19%	21%
The meter is in an awkward place / too difficult to access	17%	19%	13%	16%
The installation would have taken too long	10%	6%	12%	20% ↑
I didn't understand why I was being asked to have it installed	12%	11%	16%	10%
Energy is not something we spend much time thinking about so I just ignored it	8%	3%	14%	14%
Other	9%	13% ↑	5%	1% ↓
Not sure	3%	4%	2%	4%
Net: Hassle	50%	47%	51%	57%

Net: Not a priority	42%	41%	52%	33%
Net: Cost incurred	30%	17% ↓	41%	57% ↑
Column n	293	66	125	102

Table 9. Reasons for rejecting the offer of a smart meter installation by seek/accept score

Column %	Total	Seek	Accept	Indifferent	Unlikely	NET: Seek and accept
I was too busy to deal with it at the time	24%	30%	30%	30%	6% ↓	30%
I didn't see the benefit of a smart meter over a traditional energy meter	27%	14% ↓	13%	34%	47% ↑	14% ↓
It was difficult to arrange a convenient time for the engineer to come and install it	24%	32%	26%	20%	14%	31%
I couldn't turn the electricity and gas off to facilitate the installation as it is critical that we always have an uninterrupted energy supply	12%	16%	18%	9%	7%	16%
There was a charge for the installation that I wasn't willing to pay	12%	10%	6%	22%	8%	9%
The meter is in an awkward place / too difficult to access	17%	16%	8%	24%	16%	15%
The installation would have taken too long	10%	15%	5%	5%	9%	13%

I didn't understand why I was being asked to have it installed	12%	13%	9%	13%	10%	13%
Energy is not something we spend much time thinking about so I just ignored it	8%	11%	14%	6%	2%	11%
Other	9%	2% ↓	21%	4%	20%	5%
Not sure	3%	3%	4%	4%	4%	3%
Net: Hassle	50%	61%	53%	54%	29% ↓	60%
Net: Not a priority	42%	35%	31%	46%	55%	34%
Net: Cost incurred	30%	39%	28%	31%	19%	36%
Column n	293	152	36	46	59	188

Table 10. Concerns about smart meter installation among those who have not been offered a smart meter and whether they own/rent their premises

Column %	Total	Own all	Own some & some are rented + All are rented
I worry about our electricity/ gas being turned off as it is critical that we always have an uninterrupted energy supply	21%	19%	24%
I worry that turning the electricity/ gas off for an installation would cost us too much money in lost business revenue	16%	15%	16%
I worry that there would be a charge for the installation	28%	27%	29%
I worry that the installation would take longer than indicated	22%	19%	25%
I worry that my/ our landlord might not agree to us having a smart meter installed	32%	N/A	32%

I worry that the installation would create disruption to the daily running of the business or organisation	33%	28%	37%
I worry that the installation could leave damage to the premises	12%	12%	13%
Other	2%	2%	2%
Not sure/ none of these	23%	26%	20%
Column n	507	174	320

Table 11. What those who rent their premises would speak to their landlord about in advance (e.g., in order to gain their agreement to carry it out)

Row %	Would speak to the landlord	Would not speak to the landlord	Don't know	Row n
Installing a smart meter	67% ↑	26% ↓	7%	503
Knocking a wall through	86% ↑	11% ↓	3%	503
Installing a new security system e.g., intercom, CCTV	59%	36%	5%	503
Arranging to have a broken energy meter fixed	60%	37%	4%	503
Installing new connectivity e.g., installing new broadband lines, new routers	45% ↓	52% ↑	3%	503
Redecorating the office	38% ↓	58% ↑	3%	503
Replacing furniture or equipment	21% ↓	75% ↑	4%	503

Table 12. What could be needed to encourage businesses to consider smart meters by business size

	Net: T2B (Important)			
Column %	Total	Micro - (Up to 9 employees)	Small - (10-49 employees)	Medium - (50-249 employees)

Installation needs to be free	37%	42% ↑	32%	21%
By getting a smart meter installed, I would have to know I had access to my suppliers' cheapest tariff	26%	26%	24%	26%
Installation needs to be quick to minimise disruption	23%	23%	21%	22%
By getting a smart meter installed, I would have to know I would get accurate bills, not estimates	21%	21%	22%	20%
The smart meter would have to continue to work if I switched to a different energy supplier	21%	22%	19%	17%
Installation appointments are booked in at a time that works for my business/ organisation	18%	19%	17%	18%
I would have to know readings would be sent automatically to my supplier e.g., no need to manually read the meter	17%	15%	21%	22%
I'd need a guarantee that the installation process would be managed efficiently by the supplier	14%	12%	14%	25% ↑
Guaranteed monetary compensation if there are any issues with the installation	12%	11%	16%	16%
I would need to receive tailored energy efficiency advice during the installation to help us save money	11%	9%	14%	13%
Column n	800	221	352	227

Table 13. Seek/accept pre-idea scores by segment

Column %	Total	Techy and Innovative	Analytical and Sustainable	Profit Focussed and Instinctual	Tried and Tested	No Risks and Cost Conscious
Seek	41%	47%	81% ↑	6% ↓	28% ↓	3% ↓
Accept	18%	15%	7% ↓	31% ↑	23%	32% ↑
Indifferent	21%	26% ↑	9% ↓	7% ↓	33% ↑	16%
Unlikely	19%	12% ↓	3% ↓	56% ↑	15%	49% ↑
NET: Seek and accept	60%	61%	88% ↑	37% ↓	52%	35% ↓
NET: Indifferent and Unlikely	40%	39%	12% ↓	63% ↑	48%	65% ↑
Column n	800	371	175	61	130	63

Table 14. Seek/accept post-idea scores by segment

	Invitational Cheapest Tariff					
Column %	Total	Techy and Innovative	Analytical and Sustainable	Profit Focussed and Instinctual	Tried and Tested	No Risks and Cost Conscious
Seek	55%	53%	83% ↑	25% ↓	56%	33% ↓
Accept	9%	13%	3% ↓	9%	10%	7%
Indifferent	18%	23%	10%	18%	17%	20%
Unlikely	18%	11% ↓	5% ↓	48% ↑	16%	40% ↑
NET: Seek and Accept	64%	66%	85% ↑	34% ↓	67%	39% ↓
NET: Indifferent and Unlikely	36%	34%	15% ↓	66% ↑	33%	61% ↑
Column n	800	371	175	61	130	63
Column %	**Exclusive monthly discount**					

	Total	Techy and Innovative	Analytical and Sustainable	Profit Focussed and Instinctual	Tried and Tested	No Risks and Cost Conscious
Seek	55%	49%	82% ↑	34% ↓	58%	38%
Accept	9%	10%	4%	6%	12%	9%
Indifferent	21%	30% ↑	7% ↓	22%	21%	17%
Unlikely	15%	12%	6% ↓	38% ↑	9%	36% ↑
NET: Seek and Accept	63%	58%	87% ↑	40% ↓	70%	48%
NET: Indifferent and Unlikely	37%	42%	13% ↓	60% ↑	30%	52%
Column n	800	371	175	61	130	63
	Deadline					
Column %	Total	Techy and Innovative	Analytical and Sustainable	Profit Focussed and Instinctual	Tried and Tested	No Risks and Cost Conscious
Seek	58%	55%	83% ↑	39% ↓	60%	34% ↓
Accept	7%	10%	4%	5%	6%	11%
Indifferent	20%	24%	8% ↓	27%	21%	20%
Unlikely	15%	12%	6% ↓	30% ↑	13%	36% ↑
NET: Seek and Accept	65%	65%	87% ↑	43% ↓	66%	45% ↓
NET: Indifferent and Unlikely	35%	35%	13% ↓	57% ↑	34%	55% ↑
Column n	800	371	175	61	130	63
	Smart as Contract Requirement					
Column %	Total	Techy and Innovative	Analytical and Sustainable	Profit Focussed and Instinctual	Tried and Tested	No Risks and Cost Conscious

Seek	56%	52%	77% ↑	44%	57%	41%
Accept	8%	11%	5%	5%	10%	6%
Indifferent	22%	29% ↑	12% ↓	24%	19%	18%
Unlikely	14%	9% ↓	6% ↓	27% ↑	14%	35% ↑
NET: Seek and Accept	64%	62%	82% ↑	49%	67%	47% ↓
NET: Indifferent and Unlikely	36%	38%	18% ↓	51%	33%	53% ↑
Column n	800	371	175	61	130	63

Table 15. Segments in wave three

Segments	%
Techy and Innovative	39%
Analytical and Sustainable	20%
Profit Focussed and Instinctual	11%
Tried and Tested	20%
No Risks and Cost Conscious	10%

Table 16. Perceptions of fairness by business size

	Invitational Cheapest Tariff			
Column %	Total	Micro - (Up to 9 employees)	Small - (10-49 employees)	Medium - (50-249 employees)
1 - Strongly disagree	4%	4%	3%	2%
2	4%	3%	5%	7%
3	21%	24% ↑	15%	14%
4	30%	27%	36%	31%
5 - Strongly agree	38%	36%	37%	45%

Don't know	4%	5%	3%	2%
Net: T2B (Agree)	67%	63% ↓	73%	76%
Net: B2B (Disagree)	8%	7%	9%	8%
Column n	800	221	352	227

	Exclusive monthly discount			
Column %	Total	Micro - (Up to 9 employees)	Small - (10-49 employees)	Medium - (50-249 employees)
1 - Strongly disagree	7%	9% ↑	3%	3%
2	8%	7%	8%	7%
3	22%	24%	20%	16%
4	35%	35%	34%	32%
5 - Strongly agree	26%	21% ↓	31%	41% ↑
Don't know	3%	3%	2%	1%
Net: T2B (Agree)	61%	57% ↓	65%	73% ↑
Net: B2B (Disagree)	14%	16%	12%	10%
Column n	800	221	352	227

	Deadline			
Column %	Total	Micro - (Up to 9 employees)	Small - (10-49 employees)	Medium - (50-249 employees)
1 - Strongly disagree	26%	32% ↑	17% ↓	11% ↓
2	12%	12%	11%	15%
3	21%	20%	21%	22%
4	23%	20%	27%	27%
5 - Strongly agree	16%	12% ↓	21%	25% ↑
Don't know	3%	3%	3%	1%

Net: T2B (Agree)	39%	33% ↓	48% ↑	51% ↑
Net: B2B (Disagree)	38%	44% ↑	28% ↓	26% ↓
Column n	800	221	352	227

	Smart as a requirement to enter into a new energy supply contract			
Column %	Total	Micro - (Up to 9 employees)	Small - (10-49 employees)	Medium - (50-249 employees)
1 - Strongly disagree	22%	27% ↑	16%	11% ↓
2	12%	11%	15%	10%
3	23%	24%	19%	21%
4	22%	20%	27%	24%
5 - Strongly agree	18%	13% ↓	22%	32% ↑
Don't know	3%	4%	1%	2%
Net: T2B (Agree)	40%	34% ↓	49% ↑	56% ↑
Net: B2B (Disagree)	34%	38% ↑	31%	21% ↓
Column n	800	221	352	227

Table 17. Perceptions of fairness by segment

	Invitational Cheapest Tariff					
Column %	Total	Techy and Innovative	Analytical and Sustainable	Profit Focussed and Instinctual	Tried and Tested	No Risks and Cost Conscious
1 - Strongly disagree	4%	2%	2%	3%	5%	7%
2	4%	6%	3%	8%	0% ↓	5%
3	21%	25%	12%	25%	24%	11%
4	30%	32%	29%	22%	29%	33%

5 - Strongly agree	38%	32%	52% ↑	36%	36%	34%
Don't know	4%	3%	2%	6%	4%	9%
Net: T2B (Agree)	67%	64%	81% ↑	58%	66%	68%
Net: B2B (Disagree)	8%	8%	5%	11%	6%	12%
Column n	800	371	175	61	130	63
	Exclusive monthly discount					
Column %	Total	Techy and Innovative	Analytical and Sustainable	Profit Focussed and Instinctual	Tried and Tested	No Risks and Cost Conscious
1 - Strongly disagree	7%	4%	3%	15%	7%	14%
2	8%	9%	4%	8%	9%	7%
3	22%	26%	13%	26%	20%	23%
4	35%	37%	38%	24%	37%	26%
5 - Strongly agree	26%	22%	40% ↑	21%	27%	20%
Don't know	3%	2%	2%	7%	0% ↓	10%
Net: T2B (Agree)	61%	59%	78% ↑	45%	64%	46%
Net: B2B (Disagree)	14%	13%	7%	23%	16%	21%
Column n	800	371	175	61	130	63
	Deadline					
Column %	Total	Techy and Innovative	Analytical and Sustainable	Profit Focussed and Instinctual	Tried and Tested	No Risks and Cost Conscious
1 - Strongly disagree	26%	13% ↓	22%	54% ↑	27%	49% ↑
2	12%	17%	11%	7%	12%	5%
3	21%	27%	13%	16%	19%	21%

4	23%	27%	27%	9%	23%	12%
5 - Strongly agree	16%	15%	26% ↑	11%	15%	7%
Don't know	3%	1%	2%	3%	4%	6%
Net: T2B (Agree)	39%	42%	53% ↑	20%	38%	19%
Net: B2B (Disagree)	38%	30%	33%	61% ↑	39%	54%
Column n	800	371	175	61	130	63

	Smart as a requirement to enter into a new energy supply contract					
Column %	Total	Techy and Innovative	Analytical and Sustainable	Profit Focussed and Instinctual	Tried and Tested	No Risks and Cost Conscious
1 - Strongly disagree	22%	13% ↓	18%	42% ↑	23%	46% ↑
2	12%	11%	11%	16%	13%	10%
3	23%	26%	21%	19%	24%	13%
4	22%	28%	18%	11%	24%	18%
5 - Strongly agree	18%	19%	31% ↑	11%	14%	3% ↓
Don't know	3%	3%	2%	1%	2%	10%
Net: T2B (Agree)	40%	47%	49%	22%	39%	21%
Net: B2B (Disagree)	34%	24% ↓	28%	58% ↑	36%	57% ↑
Column n	800	371	175	61	130	63

Table 18. How convincing the rationales are felt to be by business size and openness to smart

	The National Grid		
	Micro - (Up to 9 employees)	Small - (10-49 employees)	Medium - (50-249 employees)
Column %	DQ_SEEK ACCEPT	DQ_SEEK ACCEPT	DQ_SEEK ACCEPT

	Seek	Accept	Indifferent	Unlikely	Seek	Accept	Indifferent	Unlikely	Seek	Accept	Indifferent
1: Not very convincing	7%	8%	2%	25% ↑	2% ↓	1%	8%	22% ↑	0%	4%	3%
2	6%	5%	4%	17% ↑	4%	4%	7%	14%	4%	5%	4%
3	24%	31%	57% ↑	32%	23%	32%	46%	19%	22%	36%	39%
4	50%	35%	31%	22%	52% ↑	45%	29%	35%	46%	35%	37%
5: Very convincing	13%	21%	6%	3%	19%	18%	10%	9%	28% ↑	20%	17%
Net: T2B (Convincing)	63%	56%	37%	25% ↓	71% ↑	62%	39%	44%	74% ↑	55%	54%
Net: B2B (Not convincing)	13%	13%	6%	42% ↑	6% ↓	6%	15%	36% ↑	4% ↓	9%	7%
Column n	78	41	52	50	169	67	57	59	137	40	32
	The environment										
	Micro - (Up to 9 employees)				Small - (10-49 employees)				Medium - (50-249 employees)		
	DQ_SEEK ACCEPT				DQ_SEEK ACCEPT				DQ_SEEK ACCEPT		
Column %	Seek	Accept	Indifferent	Unlikely	Seek	Accept	Indifferent	Unlikely	Seek	Accept	Indifferent
1: Not very convincing	1%	11%	6%	30% ↑	1% ↓	6%	8%	25% ↑	2% ↓	4%	3%
2	12%	11%	14%	15%	4%	6%	9%	8%	3%	11%	5%
3	29%	26%	45%	28%	27%	28%	40%	22%	18% ↓	38%	43%
4	33%	33%	29%	26%	46% ↑	46%	29%	38%	47% ↑	33%	37%
5: Very convincing	23%	19%	6%	1% ↓	21%	15%	14%	7%	30% ↑	14%	12%
Net: T2B (Convincing)	57%	52%	35%	27% ↓	67% ↑	61%	43%	45%	77% ↑	47%	49%

Net: B2B (Not convincing)	14%	21%	20%	44% ↑	6% ↓	11%	17%	33%	5% ↓	15%	8%
Column n	78	41	52	50	169	67	57	59	137	40	32
	Access to half hourly data										
	Micro - (Up to 9 employees)				Small - (10-49 employees)				Medium - (50-249 employees)		
	DQ_SEEK ACCEPT				DQ_SEEK ACCEPT				DQ_SEEK ACCEPT		
Column %	Seek	Accept	Indifferent	Unlikely	Seek	Accept	Indifferent	Unlikely	Seek	Accept	Indifferent
1: Not very convincing	1%	3%	8%	34% ↑	3% ↓	3%	8%	27% ↑	2% ↓	2%	3%
2	10%	14%	11%	21%	5%	13%	9%	14%	3% ↓	8%	3%
3	25%	22%	51% ↑	30%	19% ↓	36%	46%	25%	24%	34%	33%
4	43%	42%	28%	8% ↓	46% ↑	32%	32%	29%	43%	45%	58% ↑
5: Very convincing	21%	19%	2% ↓	7%	28% ↑	16%	6%	6%	29% ↑	10%	4%
Net: T2B (Convincing)	64% ↑	61%	30% ↓	15% ↓	74% ↑	48%	38%	35%	72% ↑	56%	62%
Net: B2B (Not convincing)	11%	17%	19%	55% ↑	7% ↓	15%	17%	40% ↑	4% ↓	10%	5%
Column n	78	41	52	50	169	67	57	59	137	40	32
	Great Britain's energy system										
	Micro - (Up to 9 employees)				Small - (10-49 employees)				Medium - (50-249 employees)		
	DQ_SEEK ACCEPT				DQ_SEEK ACCEPT				DQ_SEEK ACCEPT		
Column %	Seek	Accept	Indifferent	Unlikely	Seek	Accept	Indifferent	Unlikely	Seek	Accept	Indifferent
1: Not very convincing	6%	3%	8%	34% ↑	2% ↓	3%	10%	25% ↑	3% ↓	5%	3%

2	6%	14%	4%	22% ↑	4%	6%	10%	8%	3%	14%	12%
3	27%	30%	49% ↑	24%	24%	42%	40%	30%	22%	24%	42%
4	50%	36%	33%	20% ↓	43%	36%	34%	26%	45%	43%	28%
5: Very convincing	13%	17%	6%	0% ↓	28% ↑	13%	7%	11%	27% ↑	13%	15%
Net: T2B (Convincing)	62%	53%	39%	20% ↓	71% ↑	49%	41%	37%	72% ↑	56%	43%
Net: B2B (Not convincing)	11%	17%	12%	56% ↑	6% ↓	8%	20%	33% ↑	6% ↓	20%	14%
Column n	78	41	52	50	169	67	57	59	137	40	32

	A more efficient energy system (half hourly settlement)										
	Micro - (Up to 9 employees)				Small - (10-49 employees)				Medium - (50-249 employees)		
	DQ_SEEK ACCEPT				DQ_SEEK ACCEPT				DQ_SEEK ACCEPT		
Column %	Seek	Accept	Indifferent	Unlikely	Seek	Accept	Indifferent	Unlikely	Seek	Accept	Indifferent
1: Not very convincing	6%	5%	4%	23% ↑	1% ↓	5%	8%	22% ↑	2%	2%	3%
2	10%	8%	6%	17%	9%	3%	9%	13%	6%	3%	3%
3	31%	19%	59% ↑	32%	28%	48%	43%	26%	27%	43%	28%
4	35%	50%	23%	20%	44%	31%	34%	29%	42%	38%	56%
5: Very convincing	18%	18%	8%	8%	18%	13%	6%	10%	23%	14%	11%
Net: T2B (Convincing)	53%	67%	31% ↓	28% ↓	62% ↑	44%	40%	40%	65% ↑	52%	67%
Net: B2B (Not convincing)	16%	13%	10%	40% ↑	10%	8%	17%	35% ↑	9%	5%	5%
Column n	78	41	52	50	169	67	57	59	137	40	32

Table 19. How convincing the rationales are felt to be by segment

	The National Grid					
Column %	Total	Techy and Innovative	Analytical and Sustainable	Profit Focussed and Instinctual	Tried and Tested	No Risks and Cost Conscious
1: Not very convincing	8%	3% ↓	4%	33% ↑	4%	16%
2	7%	6%	2% ↓	11%	9%	15%
3	32%	37%	22%	27%	38%	31%
4	39%	43%	50%	18% ↓	38%	24%
5: Very convincing	13%	11%	21% ↑	10%	11%	15%
Net: T2B (Convincing)	52%	54%	72% ↑	29% ↓	49%	39%
Net: B2B (Not convincing)	15%	9% ↓	6% ↓	44% ↑	13%	31% ↑
Column n	800	371	175	61	130	63
	The environment					
Column %	Total	Techy and Innovative	Analytical and Sustainable	Profit Focussed and Instinctual	Tried and Tested	No Risks and Cost Conscious
1: Not very convincing	9%	3% ↓	1% ↓	39% ↑	9%	13%
2	10%	8%	4%	7%	19% ↑	22%
3	30%	36%	29%	27%	29%	19%
4	35%	42%	35%	21%	28%	34%
5: Very convincing	16%	12%	30% ↑	5%	14%	12%
Net: T2B (Convincing)	50%	54%	66% ↑	27% ↓	42%	46%
Net: B2B (Not convincing)	19%	10% ↓	5% ↓	46% ↑	28%	34%
Column n	800	371	175	61	130	63

Column %	Access to half hourly data					
	Total	Techy and Innovative	Analytical and Sustainable	Profit Focussed and Instinctual	Tried and Tested	No Risks and Cost Conscious
1: Not very convincing	9%	2% ↓	2%	36% ↑	10%	17%
2	11%	10%	7%	13%	13%	18%
3	30%	37%	25%	20%	31%	23%
4	35%	36%	38%	25%	38%	26%
5: Very convincing	15%	15%	28% ↑	6%	8%	16%
Net: T2B (Convincing)	50%	51%	66% ↑	32%	46%	43%
Net: B2B (Not convincing)	20%	12% ↓	9% ↓	49% ↑	23%	34%
Column n	800	371	175	61	130	63
	Great Britain's energy system					
Column %	Total	Techy and Innovative	Analytical and Sustainable	Profit Focussed and Instinctual	Tried and Tested	No Risks and Cost Conscious
1: Not very convincing	10%	4% ↓	3% ↓	33% ↑	10%	20%
2	9%	7%	3% ↓	16%	11%	19%
3	31%	36%	23%	21%	39%	21%
4	37%	40%	46%	26%	32%	32%
5: Very convincing	13%	12%	25% ↑	4%	9%	8%
Net: T2B (Convincing)	50%	53%	71% ↑	30% ↓	40%	40%
Net: B2B (Not convincing)	19%	11% ↓	6% ↓	49% ↑	21%	39% ↑
Column n	800	371	175	61	130	63
Column %	**A more efficient energy system (half hourly settlement)**					

	Total	Techy and Innovative	Analytical and Sustainable	Profit Focussed and Instinctual	Tried and Tested	No Risks and Cost Conscious
1: Not very convincing	8%	2% ↓	5%	25% ↑	6%	20% ↑
2	9%	9%	7%	13%	11%	7%
3	35%	41%	27%	30%	35%	32%
4	34%	37%	31%	24%	40%	29%
5: Very convincing	14%	10%	31% ↑	10%	8%	13%
Net: T2B (Convincing)	48%	48%	61% ↑	33%	49%	41%
Net: B2B (Not convincing)	17%	12%	12%	37% ↑	17%	27%
Column n	800	371	175	61	130	63

Table 20. Most convincing rationales by business size

	Access to half hourly data			
Column %	Total	Micro - (Up to 9 employees)	Small - (10-49 employees)	Medium - (50-249 employees)
1: Most convincing	25%	25%	27%	22%
2	19%	19%	17%	18%
3	19%	18%	18%	20%
4	17%	16%	21%	20%
5: Least convincing	20%	22%	17%	19%
Net: T2B (Convincing)	44%	44%	43%	41%
Net: B2B (Not convincing)	38%	37%	38%	39%
Column n	800	221	352	227
Column %	**The National Grid**			

	Total	Micro - (Up to 9 employees)	Small - (10-49 employees)	Medium - (50-249 employees)
1: Most convincing	21%	23%	18%	17%
2	19%	17%	23%	23%
3	22%	23%	20%	21%
4	22%	22%	19%	25%
5: Least convincing	16%	14%	21%	15%
Net: T2B (Convincing)	40%	40%	41%	40%
Net: B2B (Not convincing)	38%	37%	40%	39%
Column n	800	221	352	227

	Great Britain's energy system			
Column %	Total	Micro - (Up to 9 employees)	Small - (10-49 employees)	Medium - (50-249 employees)
1: Most convincing	15%	14%	15%	19%
2	25%	27%	24%	20%
3	21%	22%	22%	20%
4	21%	21%	21%	22%
5: Least convincing	17%	16%	18%	19%
Net: T2B (Convincing)	40%	41%	38%	39%
Net: B2B (Not convincing)	38%	37%	40%	41%
Column n	800	221	352	227

	A more efficient energy system (half hourly settlement)			
Column %	Total	Micro - (Up to 9 employees)	Small - (10-49 employees)	Medium - (50-249 employees)

1: Most convincing	20%	21%	20%	19%
2	20%	21%	17%	21%
3	19%	19%	19%	20%
4	17%	16%	21%	18%
5: Least convincing	23%	23%	23%	22%
Net: T2B (Convincing)	41%	42%	38%	39%
Net: B2B (Not convincing)	40%	39%	43%	40%
Column n	800	221	352	227
	The environment			
Column %	Total	Micro - (Up to 9 employees)	Small - (10-49 employees)	Medium - (50-249 employees)
1: Most convincing	18%	17%	20%	23%
2	17%	15%	20%	18%
3	19%	18%	21%	19%
4	22%	25%	18%	15%
5: Least convincing	24%	25%	21%	25%
Net: T2B (Convincing)	35%	32%	40%	41%
Net: B2B (Not convincing)	46%	50%	39%	40%
Column n	800	221	352	227

Table 21. Most convincing rationales by sector

	Access to half hourly data			
Column %	Total	Private sector	Public sector	Net: Public sector (includes

				voluntary sector)
1: Most convincing	25%	26%	22%	21%
2	19%	18%	20%	23%
3	19%	19%	22%	20%
4	17%	17%	22%	21%
5: Least convincing	20%	21%	14%	15%
Net: T2B (Convincing)	44%	43%	42%	44%
Net: B2B (Not convincing)	38%	38%	36%	36%
Column n	800	669	114	131

	The National Grid			
Column %	Total	Private sector	Public sector	Net: Public sector (includes voluntary sector)
1: Most convincing	21%	22%	16%	16%
2	19%	18%	28%	27%
3	22%	22%	17%	18%
4	22%	22%	21%	21%
5: Least convincing	16%	15%	18%	18%
Net: T2B (Convincing)	40%	40%	44%	43%
Net: B2B (Not convincing)	38%	37%	39%	39%
Column n	800	669	114	131

	Great Britain's energy system			
Column %	Total	Private sector	Public sector	Net: Public sector

				(includes voluntary sector)
1: Most convincing	15%	14%	20%	20%
2	25%	26%	17%	17%
3	21%	22%	20%	21%
4	21%	21%	25%	24%
5: Least convincing	17%	17%	18%	18%
Net: T2B (Convincing)	40%	41%	37%	37%
Net: B2B (Not convincing)	38%	38%	43%	43%
Column n	800	669	114	131
	A more efficient energy system (half hourly settlement)			
Column %	Total	Private sector	Public sector	Net: Public sector (includes voluntary sector)
1: Most convincing	20%	20%	24%	23%
2	20%	21%	18%	18%
3	19%	19%	19%	19%
4	17%	17%	15%	17%
5: Least convincing	23%	23%	25%	24%
Net: T2B (Convincing)	41%	41%	41%	40%
Net: B2B (Not convincing)	40%	40%	39%	40%
Column n	800	669	114	131
Column %	**The environment**			

	Total	Private sector	Public sector	Net: Public sector (includes voluntary sector)
1: Most convincing	18%	18%	18%	20%
2	17%	17%	18%	16%
3	19%	18%	22%	22%
4	22%	23%	18%	17%
5: Least convincing	24%	24%	25%	25%
Net: T2B (Convincing)	35%	35%	36%	36%
Net: B2B (Not convincing)	46%	47%	42%	42%
Column n	800	669	114	131

Table 22. Most convincing rationales by segment

	Access to half hourly data					
Column %	Total	Techy and Innovative	Analytical and Sustainable	Profit Focussed and Instinctual	Tried and Tested	No Risks and Cost Conscious
1: Most convincing	25%	20%	23%	34%	26%	35%
2	19%	24%	19%	15%	13%	11%
3	19%	24%	19%	9%	11%	25%
4	17%	18%	19%	10%	22%	13%
5: Least convincing	20%	14%	21%	32%	27%	17%
Net: T2B (Convincing)	44%	45%	42%	49%	40%	46%

Net: B2B (Not convincing)	38%	31%	40%	42%	49%	30%
Column n	800	371	175	61	130	63
	The National Grid					
Column %	Total	Techy and Innovative	Analytical and Sustainable	Profit Focussed and Instinctual	Tried and Tested	No Risks and Cost Conscious
1: Most convincing	21%	23%	17%	19%	17%	32%
2	19%	17%	21%	19%	19%	25%
3	22%	19%	20%	27%	24%	29%
4	22%	22%	27%	20%	23%	11%
5: Least convincing	16%	19%	15%	14%	17%	2% ↓
Net: T2B (Convincing)	40%	40%	38%	38%	36%	57%
Net: B2B (Not convincing)	38%	41%	42%	35%	40%	14% ↓
Column n	800	371	175	61	130	63
	Great Britain's energy system					
Column %	Total	Techy and Innovative	Analytical and Sustainable	Profit Focussed and Instinctual	Tried and Tested	No Risks and Cost Conscious
1: Most convincing	15%	17%	14%	8%	18%	11%
2	25%	25%	19%	36%	26%	24%
3	21%	18%	25%	20%	27%	18%
4	21%	22%	24%	21%	13%	31%
5: Least convincing	17%	17%	18%	14%	16%	16%
Net: T2B (Convincing)	40%	43%	33%	44%	44%	35%
Net: B2B (Not convincing)	38%	39%	43%	36%	29%	47%

Column n	800	371	175	61	130	63
	A more efficient energy system (half hourly settlement)					
Column %	Total	Techy and Innovative	Analytical and Sustainable	Profit Focussed and Instinctual	Tried and Tested	No Risks and Cost Conscious
1: Most convincing	20%	20%	22%	27%	23%	7%
2	20%	16%	22%	23%	22%	26%
3	19%	19%	19%	25%	21%	14%
4	17%	22%	14%	9%	15%	19%
5: Least convincing	23%	23%	24%	17%	19%	34%
Net: T2B (Convincing)	41%	36%	43%	50%	46%	34%
Net: B2B (Not convincing)	40%	45%	38%	26%	34%	53%
Column n	800	371	175	61	130	63
	The environment					
Column %	Total	Techy and Innovative	Analytical and Sustainable	Profit Focussed and Instinctual	Tried and Tested	No Risks and Cost Conscious
1: Most convincing	18%	19%	25%	11%	15%	15%
2	17%	17%	20%	8%	20%	13%
3	19%	21%	18%	19%	17%	14%
4	22%	16%	16%	39%	27%	26%
5: Least convincing	24%	27%	22%	23%	21%	31%
Net: T2B (Convincing)	35%	36%	44%	19%	35%	28%
Net: B2B (Not convincing)	46%	43%	38%	62%	48%	57%
Column n	800	371	175	61	130	63

Table 23. Most useful sources of information to hear about smart meters from by business size

Column %	Total	Micro - (Up to 9 employees)	Small - (10-49 employees)	Medium - (50-249 employees)
UK Government	61%	58%	62%	74% ↑
Energy suppliers	64%	62%	68%	70%
Smart Energy GB	18%	16%	19%	28% ↑
Environmental organisations	19%	18%	18%	25%
OfGem	28%	30%	25%	24%
Local councils	20%	21%	16%	21%
Social media	12%	11%	14%	17%
Local business community groups	11%	9%	12%	16%
Trade bodies	13%	13%	9%	16%
TV/ advertising	20%	21%	19%	14%
Paid third party specialists e.g., energy consultants, energy brokers	9%	7%	9%	14%
Business support helplines	12%	12%	11%	13%
Family, friends	10%	10%	12%	7%
Non-exec directors/ business owners	3%	3%	2%	2%
Don't know/ none of these	8%	11% ↑	6%	2% ↓
Column n	800	221	352	227

Table 24. Most useful sources of information to hear about smart meters from by sector

Column %	Total	Private sector	Public sector	Net: Public sector (includes Voluntary sector)
UK Government	61%	59% ↓	74%	76% ↑
Energy suppliers	64%	63%	75%	75%
Smart Energy GB	18%	19%	14%	15%
Environmental organisations	19%	19%	21%	21%
OfGem	28%	28%	24%	25%
Local councils	20%	20%	23%	24%
Social media	12%	12%	17%	17%
Local business community groups	11%	10%	11%	11%
Trade bodies	13%	13%	11%	11%
TV/ advertising	20%	20%	21%	18%
Paid third party specialists e.g., energy consultants, energy brokers	9%	8%	11%	11%
Business support helplines	12%	13%	7%	7%
Family, friends	10%	9%	12%	12%
Non-exec directors/ business owners	3%	3%	3%	2%
Don't know/ none of these	8%	9%	2%	2%
Column n	800	669	114	131

Table 25. Owners/renters

Column %	Total
Own all	39%
Own some & some are rented	24%
All are rented	36%
Net: Rent at least some	59%
Not sure	2%

Table 26. Invitational Cheapest Tariff – breakdown of post-idea attitudes by pre-idea (initial) attitude (using seek/accept/indifferent/unlikely classification)

Pre-idea seek/accept	Post idea seek/accept			
	Seek	Accept	Indifferent	Unlikely
Seek	84%	5%	7%	4%
Accept	61%	18%	11%	10%
Indifferent	27%	11%	46%	16%
Unlikely	15%	7%	20%	58%
NET: Seek and accept	77%	9%	8%	6%
NET: Indifferent and Unlikely	21%	9%	34%	36%

Table 27. Exclusive Monthly Discount – breakdown of post-idea attitudes by pre-idea (initial) attitude (using seek/accept/indifferent/unlikely classification)

Pre-idea seek/accept	Post idea seek/accept			
	Seek	Accept	Indifferent	Unlikely
Seek	79%	9%	8%	5%
Accept	60%	16%	17%	8%
Indifferent	33%	4%	51%	11%

Unlikely	22%	7%	22%	49%
NET: Seek and accept	73%	11%	11%	6%
NET: Indifferent and Unlikely	28%	5%	37%	29%

Table 28. Deadline – breakdown of post-idea attitudes by pre-idea (initial) attitude (using seek/accept/indifferent/unlikely classification)

Pre-idea seek/accept	Post idea seek/accept			
	Seek	Accept	Indifferent	Unlikely
Seek	83%	6%	6%	5%
Accept	65%	12%	15%	7%
Indifferent	33%	7%	46%	14%
Unlikely	24%	5%	25%	46%
NET: Seek and accept	78%	8%	9%	6%
NET: Indifferent and Unlikely	29%	6%	36%	29%

Table 29. Smart as a Contract Requirement – breakdown of post-idea attitudes by pre-idea (initial) attitude (using seek/accept/indifferent/unlikely classification)

Pre-idea seek/accept category	Post idea seek/accept attitude			
	Seek	Accept	Indifferent	Unlikely
Seek	79%	6%	12%	3%
Accept	67%	8%	15%	9%
Indifferent	29%	14%	44%	14%
Unlikely	26%	7%	26%	40%
NET: Seek and accept	75%	7%	13%	5%
NET: Indifferent and Unlikely	28%	11%	35%	26%