



Early Consumer Experiences of Smart Meters

April 2016



Registered in London No. 2231083
Accent Marketing & Research Limited
Registered Address: 30 City Road, London, EC1Y 2AB

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Executive Summary

Background

The research is set in the context of the rollout of smart meters to homes and small businesses across Great Britain. Smart meters supersede advanced meters which only allow one way live communication from the consumer to the supplier, although suppliers can feedback non live information to consumers. Smart meters send energy consumption data automatically to energy providers. This information is also provided live to customers which enables them to monitor and better understand their energy consumption. The first wave of smart meters that meet government specifications are SMETS1 meters (smart meter equipment technical specification 1). SMETS1 meters may not provide customers with all of the services and information they originally could obtain when they were installed if they switch to a new energy supplier. The new wave of smart meters (SMETS2 meters) will not have this problem. These are likely to be introduced in Autumn 2016. Early adopters of SMETS1 smart meters may have to wait some time to have compatibility issues resolved when they switch energy supplier. This issue for consumers is further muddled by the existence of early “advanced”, pre-SMETS meters that have been (and in some cases continue to be) installed in consumer homes while being described as “smart meters”. These meters do not meet government specifications and will need to be replaced before the 2020 deadline.

The aim of the research is to provide Citizens Advice with a better understanding of early consumer experiences of the smart meter installation process, in particular attitudes to information about the potential impacts of taking on a smart meter which is not SMETS2 compliant. It also explores consumer awareness and understanding of the limitations of current smart meters, whether they are considered a problem and to understand more broadly the early consumer experience of having a smart meter and perceptions around what this means for the future.

Methodology

The research findings are based upon quantitative interviews with 70 smart meter users and 70 non users. In addition, qualitative research has explored specific themes in more detail and consisted of 15 depth interviews with smart meter users and 15 depth interviews with non users. The research was conducted between late January and mid February 2016.

Findings

The key findings of the research are as follows:

- both users and non users are positive about smart meters:
 - among smart meter users, overall, satisfaction is very high at 8.7 out of 10
 - for non users the appeal of smart meters is high at 7.2 out of 10
- however, awareness of the potential loss of services and information derived from energy consumption data is very low among users and non users. Suppliers, therefore, do not appear to be adhering to the licence condition requirements that they tell consumers about these potential issues¹:

¹ See Electricity Supply Standard Licence Obligation 25B.5, available at <https://www.ofgem.gov.uk/licences-codes-and-standards/licences/licence-conditions>

- the majority of users (91 per cent), were not informed by their supplier about any potential loss of service and information
- the majority (83 per cent), were not told that their meters would need to be replaced or adjusted in the future to address these problems
- the minority (6 per cent) of users who were alerted by their supplier that their smart meter might need to be changed or updated again in the future, were unclear why this might be the case. Most commonly, they were only told that it would need to be changed, replaced or updated, but not why this would be needed
- just over half of smart meter users do not know whether the service and information it provides would be affected if they were to change to another energy supplier
- 89 per cent of non users do not know if access to smart meter data or functionality would be affected if they were to change to another energy supplier
- all smart meter users would still have gone ahead with the installation, had they known in advance about the potential loss of information and services when switching. By contrast, over 40 percent of non users say they would not have
- further exploration within the depth interviews suggests the following:
 - the benefits users gain from their smart meter outweigh the potential disadvantages associated with switching. Perceived benefits include online pre-payment options (for prepayment customers), a financial incentive to install the smart meter (provided by some suppliers) and (near real-time) monitoring of usage.
 - among non users, some are surprised that smart meter functions could be lost when switching. Some also perceive that the potential to lose smart metering benefits may discourage switching
- if switching suppliers, smart meter users would be least happy about losing:
 - new ways of topping up prepayment meters and the ability to see how much their energy has cost them or how many units they have used over a period of time. The prominence of topping up prepayment meters in this regards is due to the high proportion of prepayment customers in the user sample. Some suppliers have business models which focus on installing smart prepay, whilst others will not be installing smart prepay until the rollout is more advanced.
- if switching, non smart meter users would be least happy about losing:
 - the ability to see how much their energy has cost over a period of time, at any single point in time and automatic meter readings

Conclusions

The majority of users are satisfied with their smart meters and, at least currently, feel that their benefits outweigh any potential issues. However, there is clear evidence that some would not, or 'might not', have gone ahead with the installation had they been aware of any potential data or functionality issues.

There is a clear need for suppliers to fulfill their current obligation to alert consumers about the potential issues they may face before they install the meters. This would enable consumers to make informed choices as to :

- whether they should gain the benefits of smart metering now but risk losing some of them if they switch supplier
- Whether they should wait for the next generation of meters and in doing so not lose any of the benefits if they switch suppliers.

1. INTRODUCTION

1.1 Background

The research is set in the context of the current early stage rollout of smart meters to homes and small businesses across Great Britain. The first wave of smart meters that will count toward government roll-out goals are known as SMETS1 meters. They allow the consumer to access near real time information about energy consumption through an in home display (IHD), online or through an app. They also send meter readings automatically to energy suppliers thus removing the need to have meters readers visit consumers' homes. The potential benefits to consumers of smart meters include an end to estimated bills, the facilitation of more efficient use of energy and, with time, integration with – and catalysing of – other smart services and products around the home. SMETS1 meters may not provide customers with all of the services and information they originally could obtain when they were installed if they switch to a new energy supplier. The new wave of smart meters (SMETS2 meters) will not have this problem. These are being introduced from April 2016.

This issue for consumers is further muddled by the existence of early “advanced”, pre-SMETS meters that have been (and in some cases continue to be) installed in consumer homes while being described as “smart meters”. These meters do not meet government specifications and will need to be replaced before the 2020 deadline. As such many consumers are unaware of what type of meter they have installed.

Based upon consumer contacts they have been receiving, Citizens Advice asked Accent to examine several specific issues that may be facing consumers who have agreed to have a smart meter installed. These concerns include:

1. suppliers not being consistent in their approach to consumer smart meter installations or communication materials. Calls to the Citizens Advice Consumer Service indicate a general lack of awareness of whether consumers' smart meters are likely to lose functionality on switching supplier, or indeed whether they are smart or 'advanced' meters. Suppliers, therefore, do not appear to be adhering to the licence condition requirements that they tell consumers about these potential issues. Conversations with suppliers confirm that in addition to this, not all suppliers are offering in home displays (IHDs) and that some continue to install non-compliant meters without making consumers aware of this
2. the implications for consumers with a SMETS1 or advanced meter if they try to switch and they will lose some, or all, smart functionality unless their meter is replaced or upgraded and enrolled with the data communication company (DCC). The DCC is responsible for the smart meter communications infrastructure. These upgrades may occur some time in the future, if at all and not all types of SMETS1 meter may be enrolled.

To this end, Citizens Advice commissioned Accent to undertake research to better understand the potential impact of this and whether consumers are aware of these issues, particularly regarding the potential loss of smart functionality upon change of supplier they may risk by accepting an earlier smart meter.

1.2 Research Objectives

The requirements of this research are consequently to provide Citizens Advice with quantitative data, supported by in-depth qualitative information, to help them understand early experiences of the smart meter rollout, perceptions of it and, more specifically consumer attitudes toward and awareness of specific issues with early meters around switching.

The key objectives of the research are as follows:

- to better understand early consumer experiences of the smart meter installation process, in particular attitudes to information about the potential impacts of taking on a smart meter which is not SMETS2 compliant
- to explore consumer awareness and understanding of the limitations of current smart meters, and whether they are considered a problem
- to understand more broadly the early consumer experience of having a smart meter and perceptions around what this means for the future

1.3 Structure of Report

This report provides findings from the research undertaken by Accent.

Section 2 describes the research methodology, Section 3 presents the findings from the smart meter users' survey, Section 4 presents the findings from the non-smart meter users' survey, and Section 5 presents a summary of the findings.

2. METHODOLOGY

2.1 Survey Mode

The research comprised two stages: the first provided quantitative data through a telephone/web survey and the second supported this with in-depth qualitative data from in-depth interviews.

A total of 170 interviews were undertaken and are included in this analysis:

- 140 combined telephone/web surveys
 - 70 with smart meters
 - 70 without a smart meter
- 30 exploratory in-depth interviews:
 - 15 with smart meters
 - 15 without a smart meter

2.2 Recruitment and Incentives

Recruitment

For those with a smart meter, the targets for the research were whoever was responsible for liaising with their supplier and/or present at installation of the smart meter. For those without, it was the person responsible for paying the household's energy bills and/or liaising with their energy supplier(s).

For smart meter users the priority was to recruit people who had been present at the installation. With that in mind, 61 of the 70 smart meter users (87 per cent) were present at installation. The remaining 9 (13 per cent), although not present at installation, were involved in organising the installation visit and in communications with the installers.

Recruitment fieldwork for both the quantitative and qualitative components of the research was undertaken by telephone. An online survey option was available if preferred.

Consumers for the depths were recruited across the course of the quantitative fieldwork period from smart meter and non-smart meter users who agreed to further research. A face-to-face approach to the depths was recommended to allow for photos of smart meters and in home displays to be taken where relevant and where smart meter users were happy for this to be done. In the event, one smart meter depth was undertaken by telephone, in agreement with Citizens Advice, in order to meet the target number of smart meter depths.

Incentives

As smart meter users are very hard to reach due to current low base of consumers who have one installed, consumers with smart meters who took part in a telephone/web survey were offered a £10 Love2Shop voucher to enhance participation. No incentive was offered to those without smart meters.

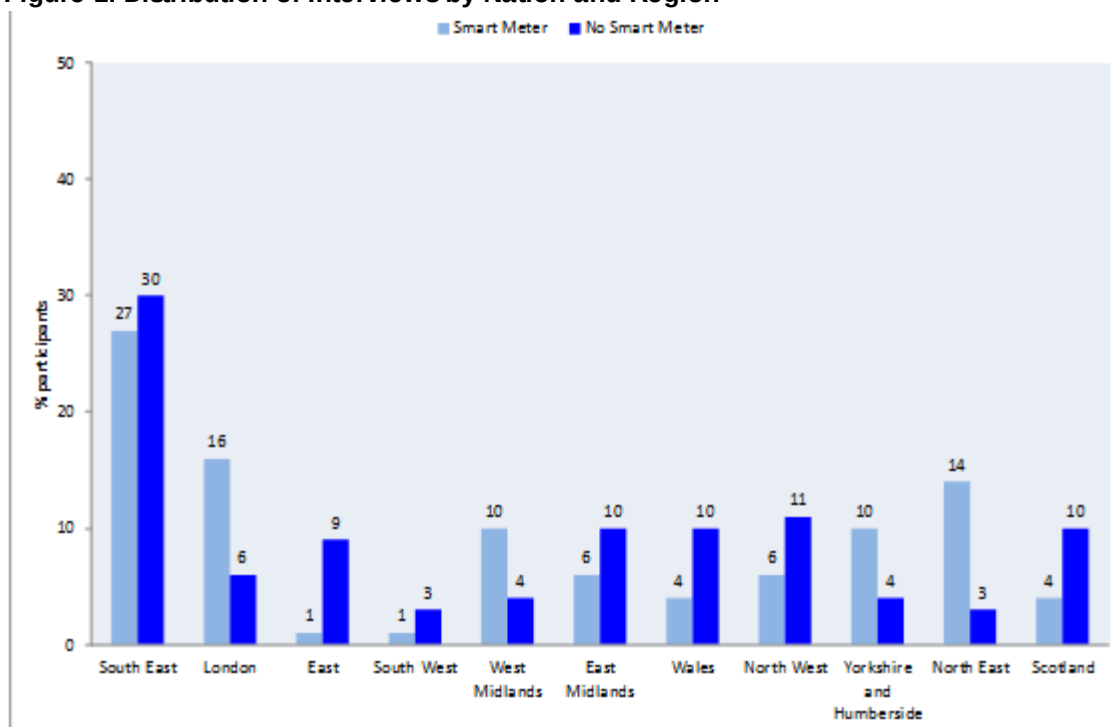
All consumers who took part in a depth received an incentive of £30 to thank them for their time.

2.3 Sampling Specification and Quota Controls

Sampling

Accent used a purchased sample of households drawn from across Great Britain. Participants were selected at random from within the sample by Accent's telephone monitoring software, then contacted, screened and interviewed as applicable using the approved survey script. The regional spread of the consumers who took part in the quantitative survey is shown below.

Figure 1: Distribution of Interviews by Nation and Region



Base: all smart meter and non-smart meter users (140; 70 of each)

Quotas

No quotas were set for those with smart meters due both to the low incidence rate of smart meter households and the known difficulties of recruiting them for research. Also because the profile of smart metered households is not known and was unlikely to be representative of GB households.

However, minimum quotas were set for non-smart meter users so that the achieved data was broadly representative of the GB population by age and socio economic group (SEG). The achieved data in Table 1 shows a slight skew towards those aged 35-64 and away from those aged 65+, as well as a slight skew towards the C2DE socio economic group².

² ABC1s consist of professionals, very senior managers in business, top level civil servants, middle management executives in large organisations with appropriate qualifications, principal officers in local government and the civil service, top managers or owners of small businesses, educational and service establishments, junior management, owners of small establishments and all other non-manual workers. C2DEs consist of skilled manual workers, manual workers with responsibility for other workers, semi skilled and unskilled manual workers, apprentices and trainees of skilled workers, long term recipients of state benefits, unemployed or off work ill for more than six months, casual workers and intermittent workers in receipt of income support. Retired participants were classified according to their last occupation or that of their spouse and whether or not they received an occupational pension.

Table 1: Non-smart meter quotas

TYPE	TARGET	ACHIEVED (n)	ACHIEVED (per cent)
Age			
16-34	11-15	11	16
35-64	35-43	47	67
65+	15-21	12	17
SEG			
ABC1	38-46	34	49
C2DE	26-30	36	51

Base: all non-smart meter users - 70

2.4 Survey Instruments

Telephone/web survey

For the telephone/web survey, two different sets of questions were used:

- one set for those with smart meters
- and one for those without

The two sets of questionnaires followed the same line of questioning, but any questions on actual installations, smart metering user issues were excluded for those without a smart meter. Where possible, non-smart meter users were asked to imagine a scenario in which they had a smart meter installed and to express a view on the potential benefits and impact of potential functionality loss.

The average survey duration was 15.29 minutes.

Depths

Depth interviews were based on a topic guide similar to the telephone/web survey scripts, but more exploratory. Two different topic guides were used:

- one for those with smart meters (Appendix B)
- and one for those without (Appendix C)

The line of questioning was similar for the two topic guides with the exception of imaginary scenarios, rather than actual experiences, being used in the case of non-smart meter users.

Moderators were also asked to take photos of smart meters and IHDs where those surveyed were happy for them to do so.

Depth duration ranged from 20-30 minutes.

2.5 Fieldwork

The quantitative fieldwork was undertaken between 21 January and 16 February 2016 and the depth fieldwork between 1 February and 17 February 2016.

Telephone fieldwork was conducted from Accent's dedicated telephone units in Edinburgh and London, staffed by highly experienced interviewing teams, trained to ISO 20252 standards.

The web surveys were managed by Accent's London-based Data Processing Team and hosted on Accent's server.

The depths were moderated by Senior Accent Executives (Senior Research Executives, Research Consultants and Research Directors).

2.6 Quality Standard

The research was undertaken in accordance with the market, opinion and social research international quality standard ISO 20252.

3. FINDINGS: SMART METER USERS

3.1 Introduction

The following section details the key findings from the research conducted with consumers who have a smart meter installed, comprising 70 telephone/web surveys and 15 in-depth interviews. The findings from quantitative and qualitative elements of this research are presented alongside each other. A selection of photos taken during the face-to-face in-depth interviews can be found in Appendix D.

These sets of data, being drawn from a relatively small number of consumers (in particular the depth interview findings), should not be considered statistically robust, but rather indicative of the views of the populations targeted. For the same reason, there is no reporting of the quantitative findings by different demographics as such reporting would not be statistically robust.

3.2 Demographics

The achieved profile of smart meter users in terms of age, socio economic group (SEG) and payment type is shown in Table 2 to Table 4 below. The greater proportion of smart meter users are aged 35+ and fall into the lower socio economic group (C2DEs). A high proportion have pre-payment meters, suggesting that this may be an early target group for some suppliers. The two largest suppliers of prepayment smart meters were Utilita (43%) and Ovo Energy (30%).

Table 2: Smart Meter User Profile by Age

	Number	per cent
16-34	11	16
35-49	30	43
50-64	26	37
65+	3	4

Base: all smart meter users - 70

Table 3: Smart Meter User Profile by Socio Economic Group

	Number	per cent
ABC1	28	40
C2DE	42	60

Base: all smart meter users - 70

Table 4: Smart Meter User Profile by Method of Paying for Energy

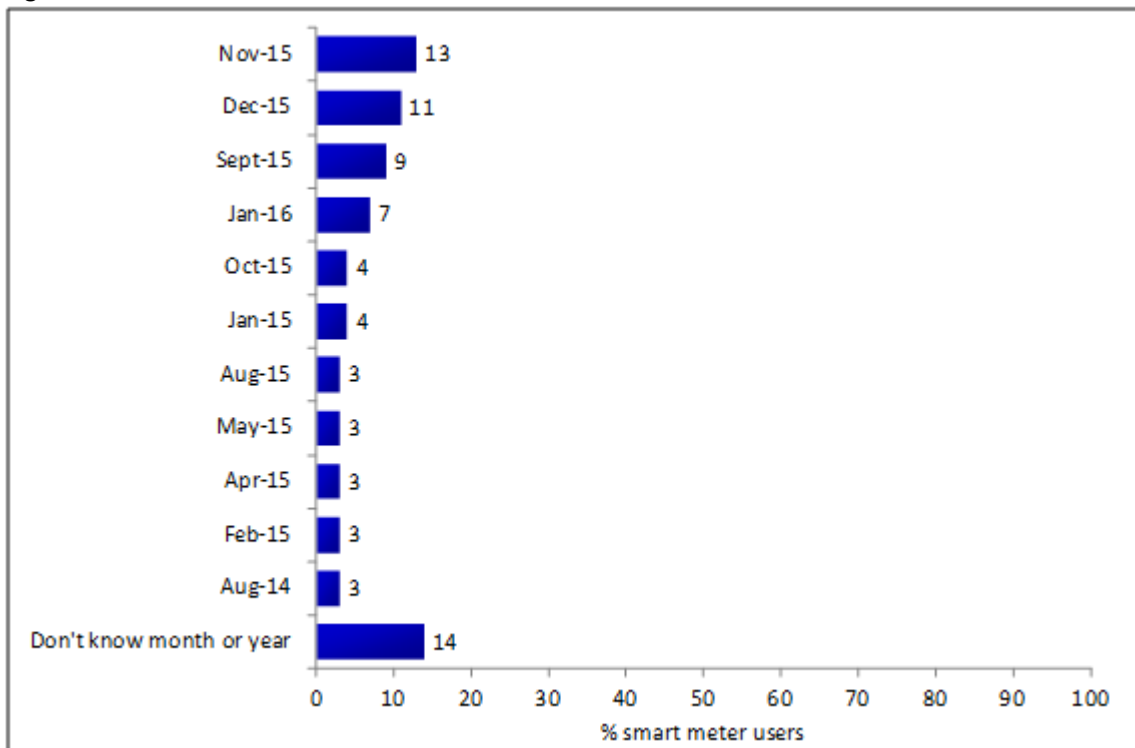
	Number	per cent
Pre-payment	54	77
Credit (cash, cheque, DD)	15	21
Don't know	1	1

Base: all smart meter users - 70

3.3 Meter Installation

The greater proportion of smart meter users have had their smart meter installed in 2015, increasing towards the latter half of the year. Some smart meter users (14 per cent) cannot recall the exact month and year of installation.

Figure 2: When the smart meter was installed



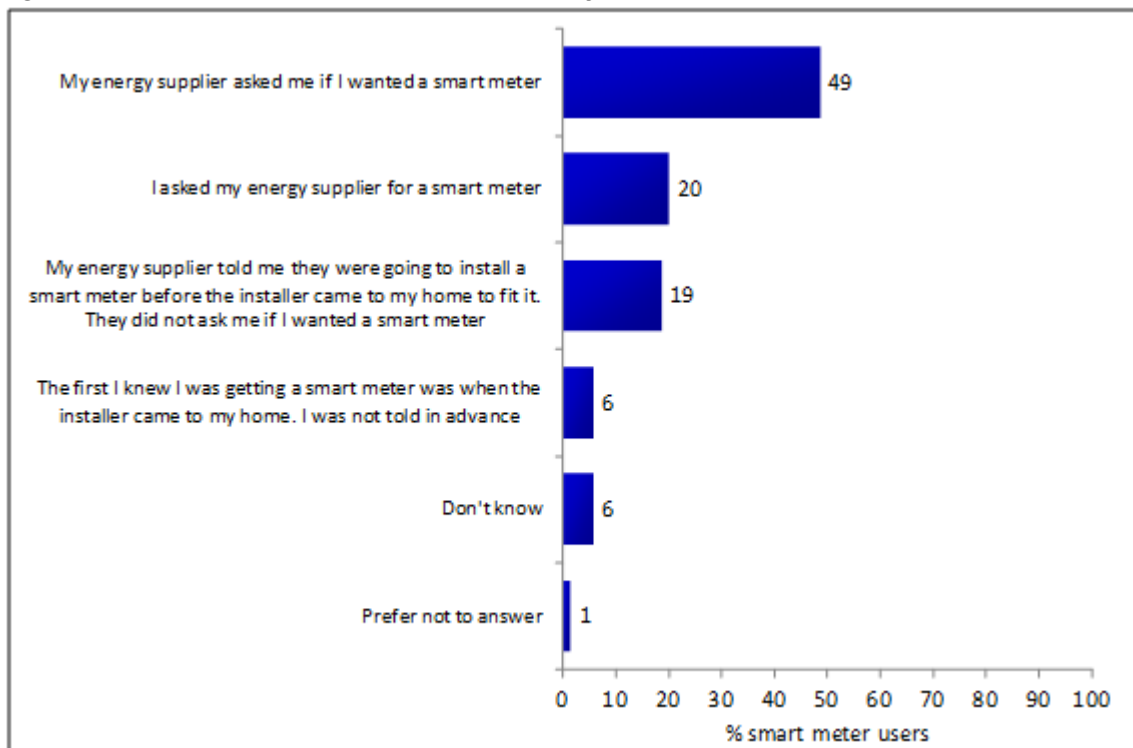
Base: All smart meter users (70). Only codes at 3 per cent or above shown.

The majority of smart meter users say they were aware they were getting a smart meter prior to installation, but not all were asked if they wanted one, or had asked for one:

- the most common route to having a smart meter installed is after the energy supplier has asked if they wanted one (49 per cent) 20 per cent of smart meter users asked their energy supplier for a smart meter
- just under a fifth (19 per cent) were told by the supplier about the installation prior to it being installed, but were not asked if they wanted one
- a small proportion (6 per cent), were not aware that they were getting a smart meter until the installer came to their door³.

³ The questionnaire did not ask this group if they were given a choice about having the meter installed when the supplier came to their door.

Figure 3: Which statement best describes how you came to have the smart meter installed?

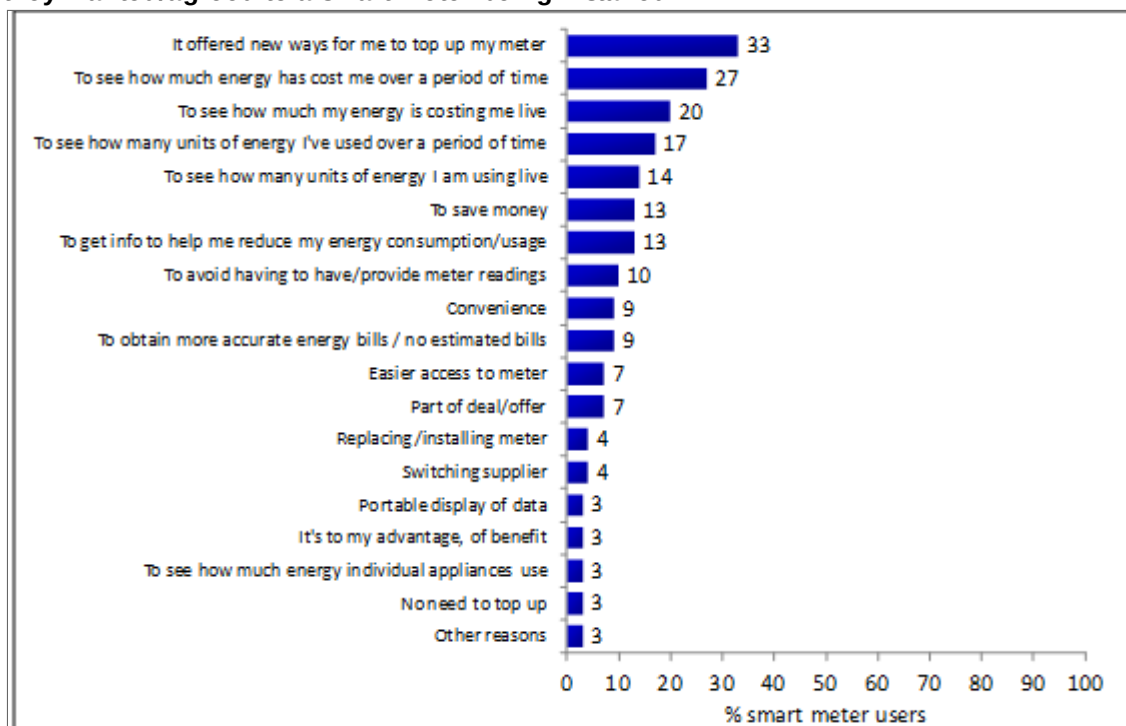


Base: All smart meter users (70)

, Participants were asked why their smart meter was installed. In answering the question, they were able to provide more than one reason. The most common reasons were as follows:

- 33 per cent: new ways to top up the meter. The high value placed on this response is being driven by the high proportion of pre-payment meter households in the survey
- 27 per cent: had it installed how much energy costs over a period of time
- 26 per cent: to save money or to get information to help reduce energy consumption
- 20 per cent: to see how much energy is costing in near real-time
- 17 per cent: to see how many units of energy have been used over a period of time

14 percent: , to see how many units of energy are being using in near real time. **Figure 4: Reason why they wanted/agreed to a smart meter being installed**



Base: All smart meter users (70)

The depth interviews confirm that more convenient top-up options are the main benefit pre-payment customers either liked or had been told about. This is also the main reason for them to have wanted or agreed to have the smart meter installed:

“Because (I was told) it would be much easier; I could just go to the shop, automatically the money will go onto the system straightaway instead of me going in the cellar and using the key and then plugging it in.”

Male, Aged 16-34, Social Class C2, Utilita, Prepayment Customer

A number of pre-payment customers think that the ability to monitor usage is also a benefit:

“There were two things. One was the convenience of not having to top up, go and find somewhere that’s open and the other thing was the fact that you could monitor your energy usage with a little smart unit. It tells you how much you use.”

Male, Aged 35-49, Social Class C1, Utilita, Prepayment Customer

Many smart meter users also mentioned a financial incentive being offered to have a smart meter installed:

“I took out a year contract, they would give me a guarantee they’d be a percentage cheaper than the cheapest one about, which was good...”

Male, Aged 50-64, Social Class C2, Utilita, Prepayment Customer

One credit customer explained that they were told that the smart meter installation was mandatory due to them having solar panels, although they would have liked a smart meter in any case, among others for aesthetic reasons:

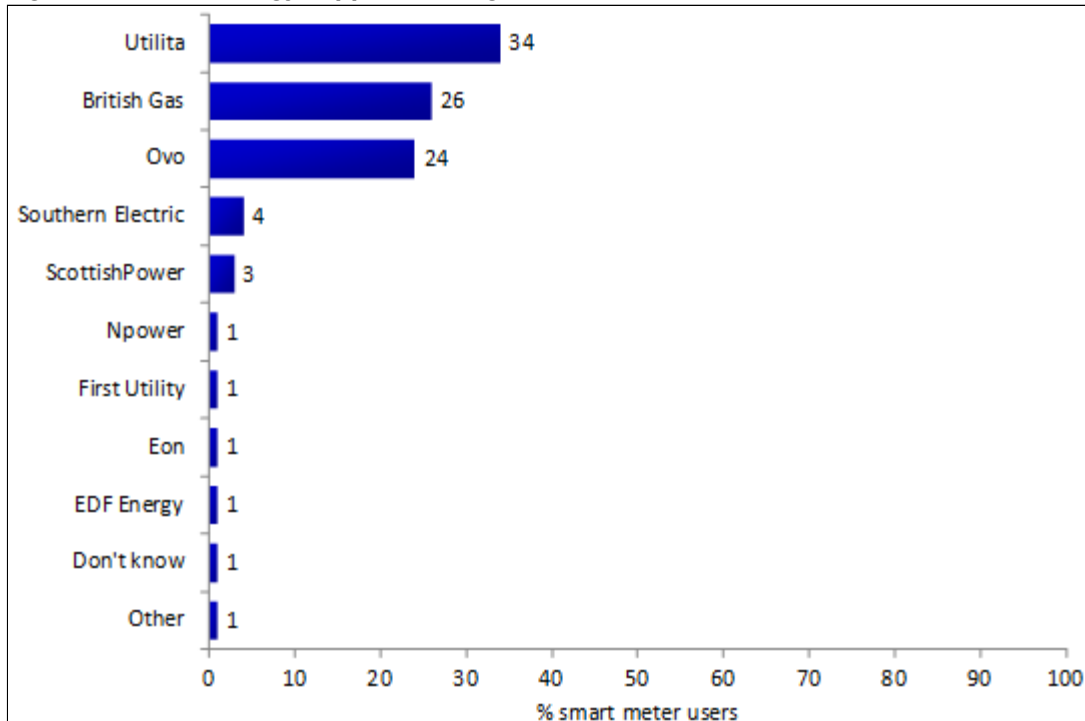
“We would have wanted it anyway... Because you know where our electric meter is... so it’s a sort of big ugly old fashioned meter there, and these nice slim new ones, we wanted to get one of those so we

could box it in and it would be nice and neat... So we asked and I think they said well no you don't qualify, it's only when we got solar that they then said: we've got to come and fit one in... ”

Female, Aged, 50-64, Social Class D, First Utility, Credit Customer

Just over a third (34 per cent) of those interviewed had their installation arranged by Utilita, just over a quarter (26 per cent) by British Gas and just under a quarter (24 per cent) by Ovo.

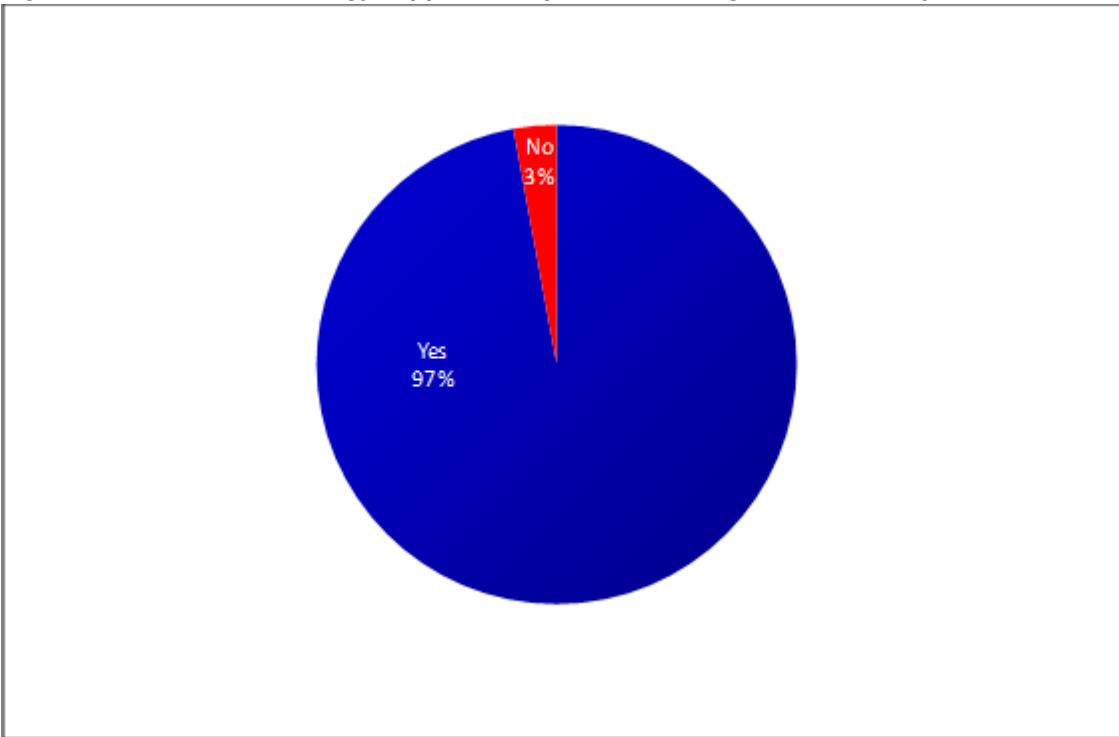
Figure 5: Which energy supplier arranged for the installation of smart meter



Base: All smart meter users (70)

For a large majority (97 per cent) of smart meter users, the supplier who arranged the installation of their smart meter still provides their gas or electricity. Only a small proportion of users (3 per cent) have switched their energy supplier since the installation.

Figure 6: Whether this energy supplier still provides their gas or electricity

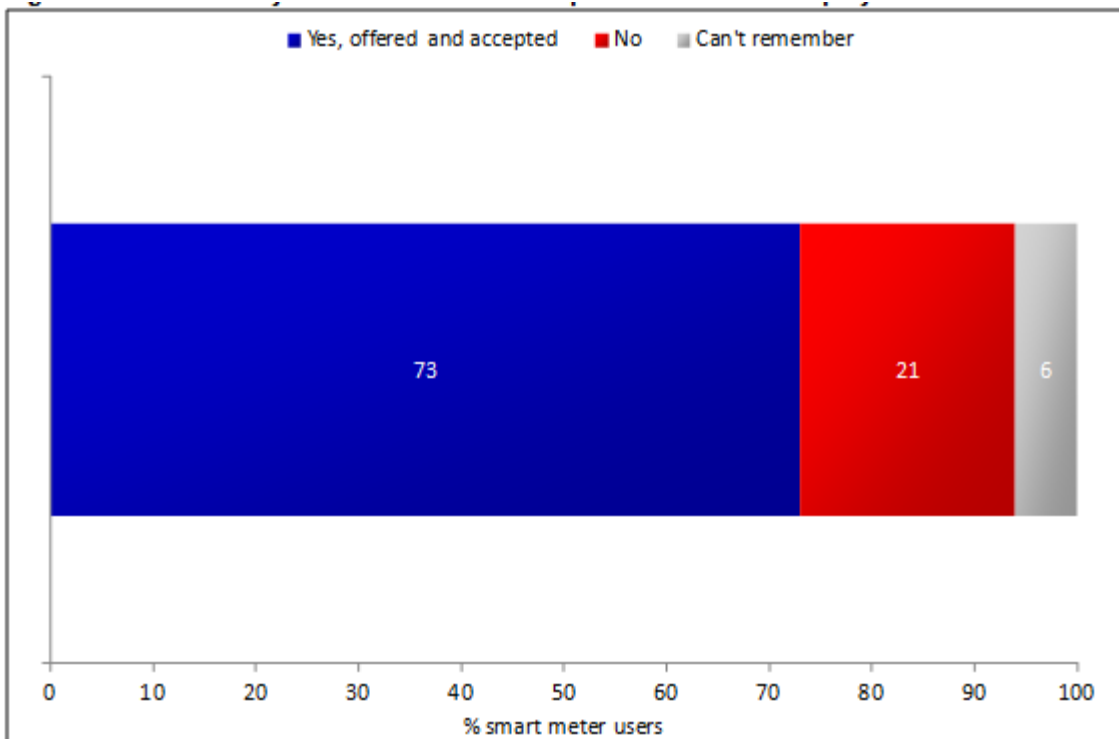


Base: All smart meter users (70)

The majority (73 per cent) of smart meter users were offered and accepted an in-home display but just over a fifth (21 per cent) were not offered one.

There is a statistically significant variation in answers across energy providers as a larger proportion of Utilita customers (96 per cent) than Ovo customers (59 per cent) were offered and accepted an in-home display.

Figure 7: Whether they were offered and accepted an in-home display



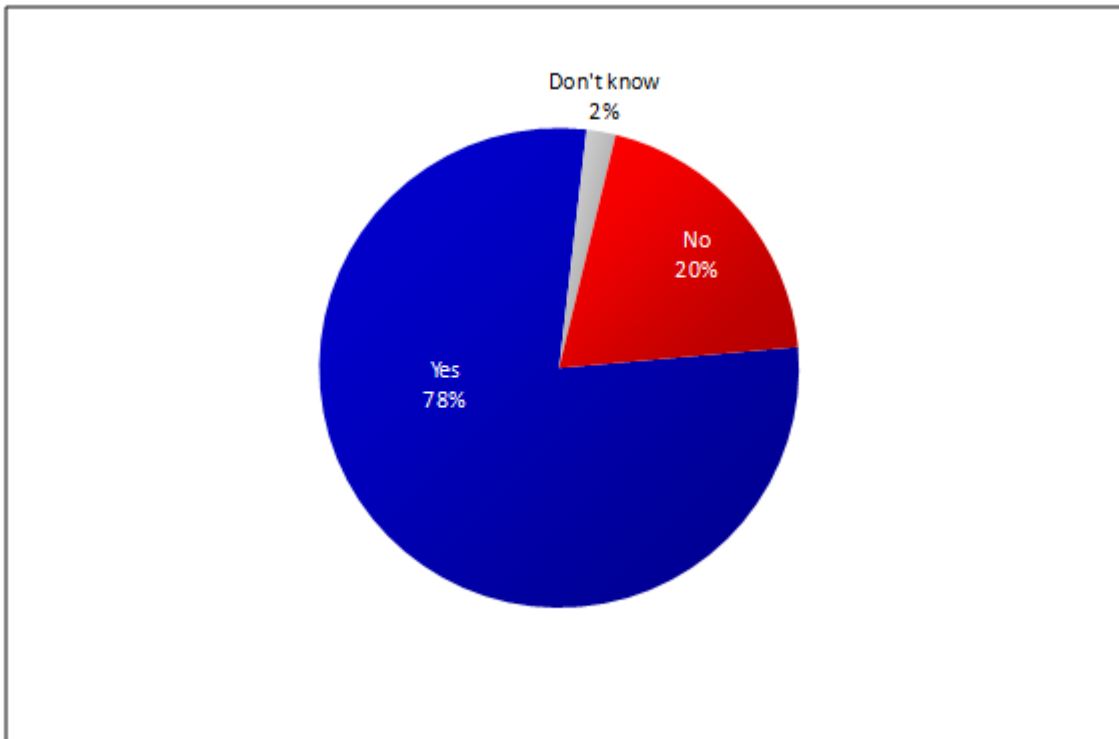
Base: All smart meter users (70)

80 per cent of smart meter users say they are viewing their smart meter data in some way. Of these, just over three quarters (78 per cent) were shown how to view it during the installation. This includes using the display, viewing the data online or through an app. However, a fifth (20 per cent) were not shown how to view the data.

There are some statistically significant variations in answers across energy providers:

- a larger proportion of Ovo customers (50 per cent) than Utilita customers (9 per cent) were not shown how to use their display.)

Figure 8: Whether the installer showed use of IHD or how to view the data online/via the app



Base: All those who are viewing the smart meter data in any way (56)

A large majority of smart meter users say that they are satisfied with the explanation given by the installer on how to view their smart meter data. On a scale of 1 to 10 where 1 means 'very dissatisfied' and 10 means 'very satisfied,' 93 per cent give a score of between 8 and 10. Over half (57 per cent) of the total give a score of 10 out of 10. The overall mean score on a scale of 1 to 10 is 9.2.

In the depth interviews, one smart meter user explains his satisfaction as follows:

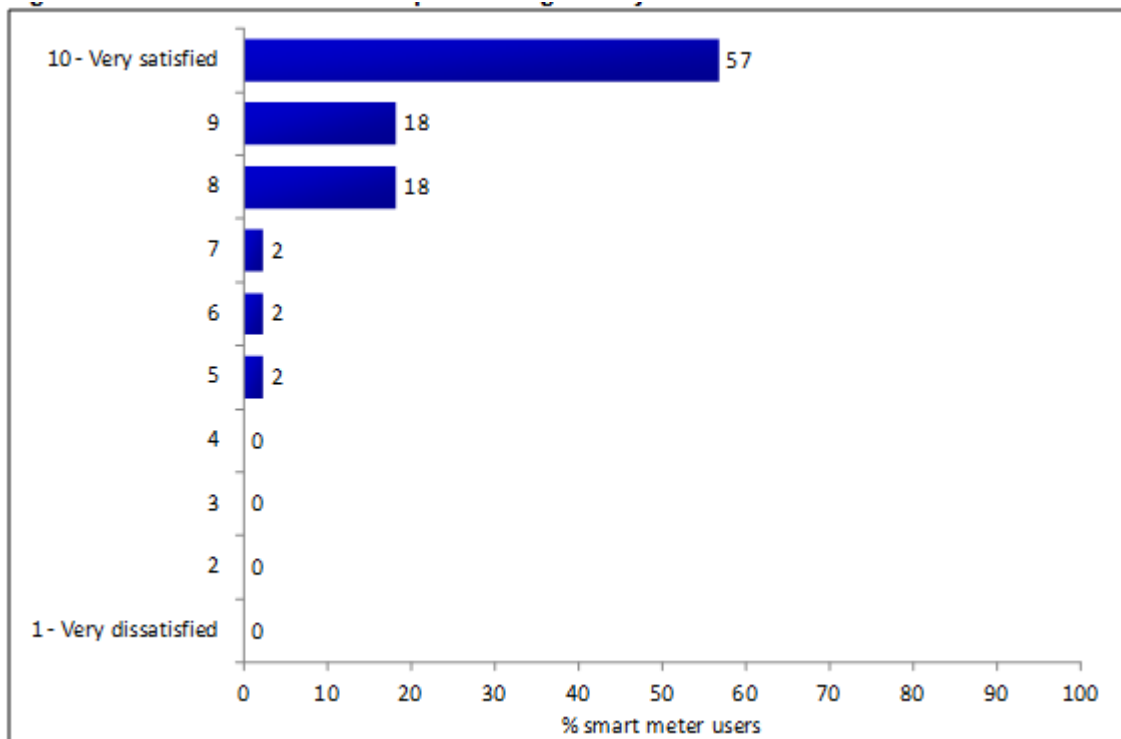
"I think it was good. Because he did do his job properly and he gave as much information what I needed to ask him. Whatever I asked him, he answered the question."

Male, Aged 18-34, Social Class C2, Utilita, Prepayment customer

In the small minority of cases where a smart meter user is dissatisfied with the installer's service, it is because the installer had not taken the time to explain how to use the smart meter (and had not offered an IHD):

"When the fitter came, he was in an extreme hurry, came in like a hurricane... He didn't tell us anything... We would have liked one [an IHD]... We haven't asked for one because we didn't know actually, that they offered one. We thought we had to probably buy it sometime...it's the first time we've had one fitted, we didn't know what to expect. We didn't know whether they should be showing us how to use it...I did ask him and he said I'm just an electrician."

Figure 9: Satisfaction with the explanation given by the installer on using the In Home Display and/or viewing the smart meter data online/through an app



Base: Those who were shown how to use their in-home display or how to view the data online/via the app (44)

3.4 Meter/IHD/Data Usage

Smart meter users were asked a number of questions to understand how they use their meter and related equipment, such as the IHD or online tool. They were also asked to rate the ease of use of these functions.

As stated earlier, a large majority (80 per cent) of smart meter users are viewing their smart meter data in some way. The most common ways of doing so are as follows:

- 59 per cent: through an IHD
- 17 per cent: through an app
- 10 per cent: through a website.

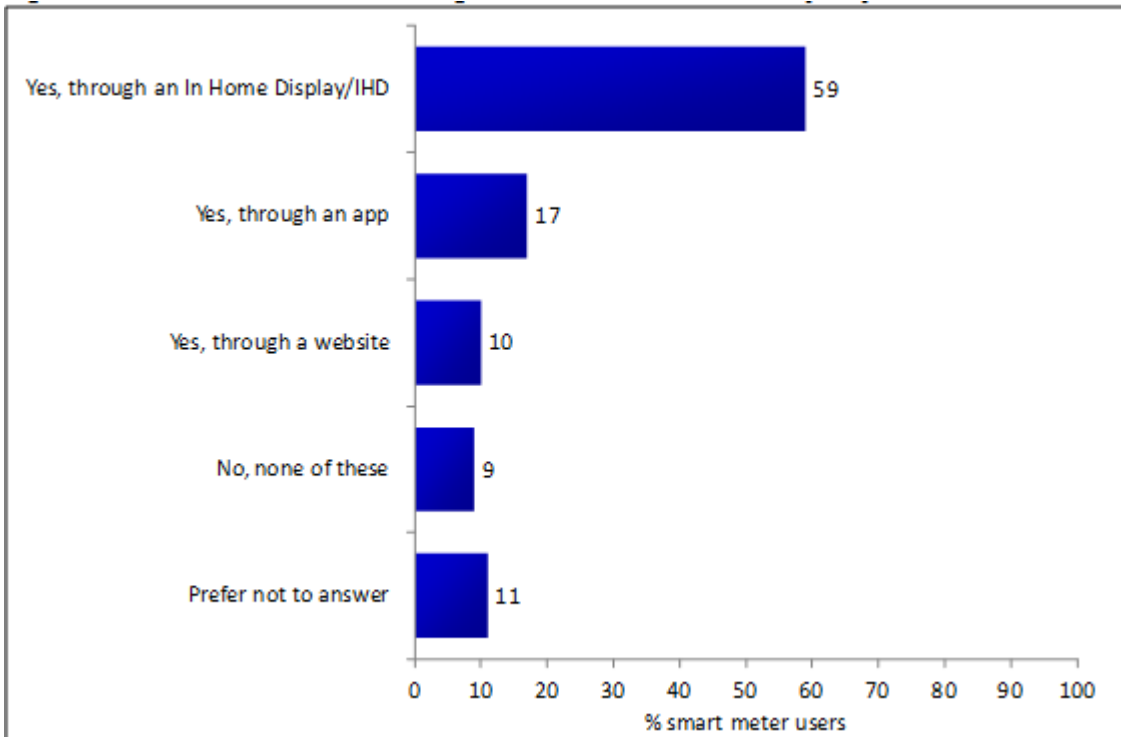
One smart meter user is viewing their smart meter data through both an in-home display and a website. Another does so through both an app and a website. One uses all three, ie an in-home display, an app and a website. 9 per cent of smart meter users do not view their smart meter data in any way.

There are some statistically significant variations in answers across energy providers:

- a larger proportion of Utilita customers (88 per cent) than British Gas (50 per cent) and Ovo customers (24 per cent) are viewing their data through an in-home display

- and a larger proportion of Ovo customers (65 per cent) than Utilita customers (4 per cent) are viewing their data through an app, this likely reflects Ovo’s focus on app-over-IHD data communications for consumers.

Figure 10: Whether users are viewing the smart meter data in any way



Base: All smart meter users (70)

Among the 6 participants who are not viewing smart meter information, the most common reason for not doing so is because they were not given an In Home Display. Other reasons include:

- not knowing how to use the In Home Display
- not being given access to online data
- not being able to access the online data
- not being able to use the mobile app or being able to get it to work.

One smart meter user who had difficulties with the display and online data explains in the depth interview that she is not a skilled technology user and the instructions are easily forgotten:

“Yes they explained to me but I’ve got a memory like a sieve and to use all these technologies nowadays it’s not me... Yes I was happy with it and I thought yeah I’ve learned something new. Then when I went to use it, because you know obviously I just left it there for days and weeks, and then when I went to use it, I thought ‘oh, how do I use it?’”

Female, Aged 50-64, Social Class E, British Gas, Prepayment customer

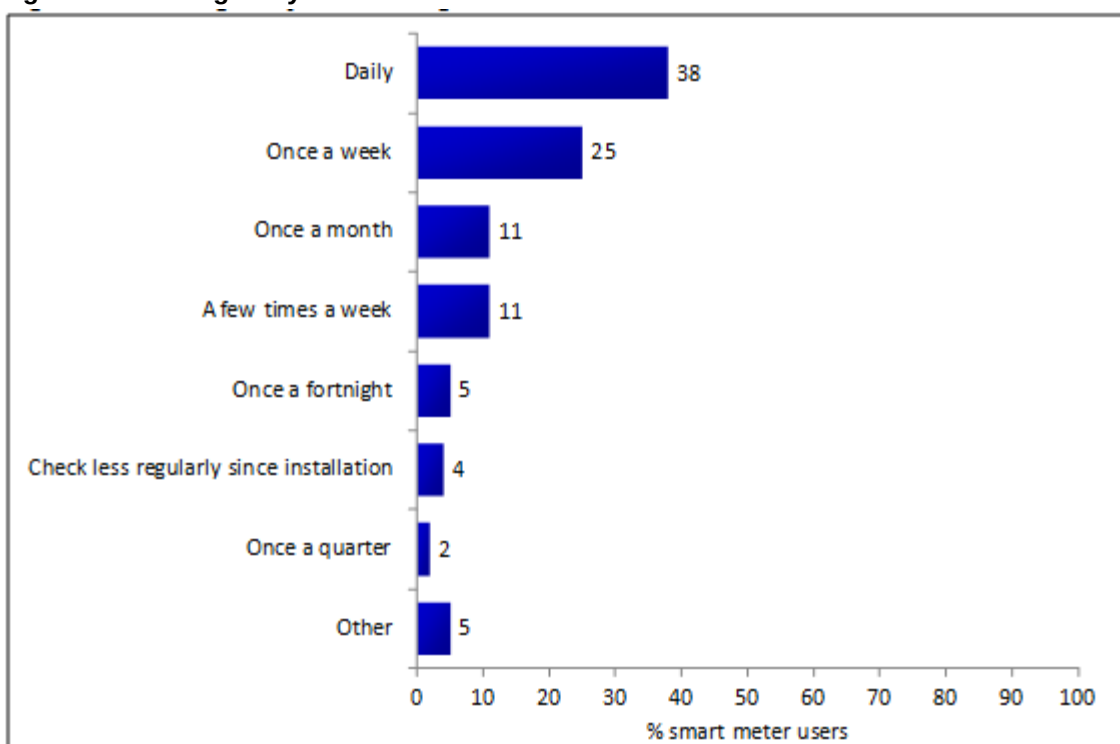
Table 5 shows the combined reasons given by those who do not view their smart meter data in any way (multi-coded responses). Frequencies rather than percentage figures are shown given the low base size.

Table 5: Reason given for not viewing the smart meter data in any way

	Frequency n=
Was not given an In Home Display	3
Do not know how to use the in home display	2
Was not given access to online data	2
Cannot access the online data	2
Cannot use the mobile app/get it to work	2
Was not given a mobile app	1
Other	1
Don't know	1
Base (LOW)	6

Among those who are viewing the smart meter data in some way, over a third (38 per cent) do so daily and a quarter (25 per cent) do so once a week. Just over a tenth of smart meter users view data a few times a week (11 per cent) or once a month (11 per cent).

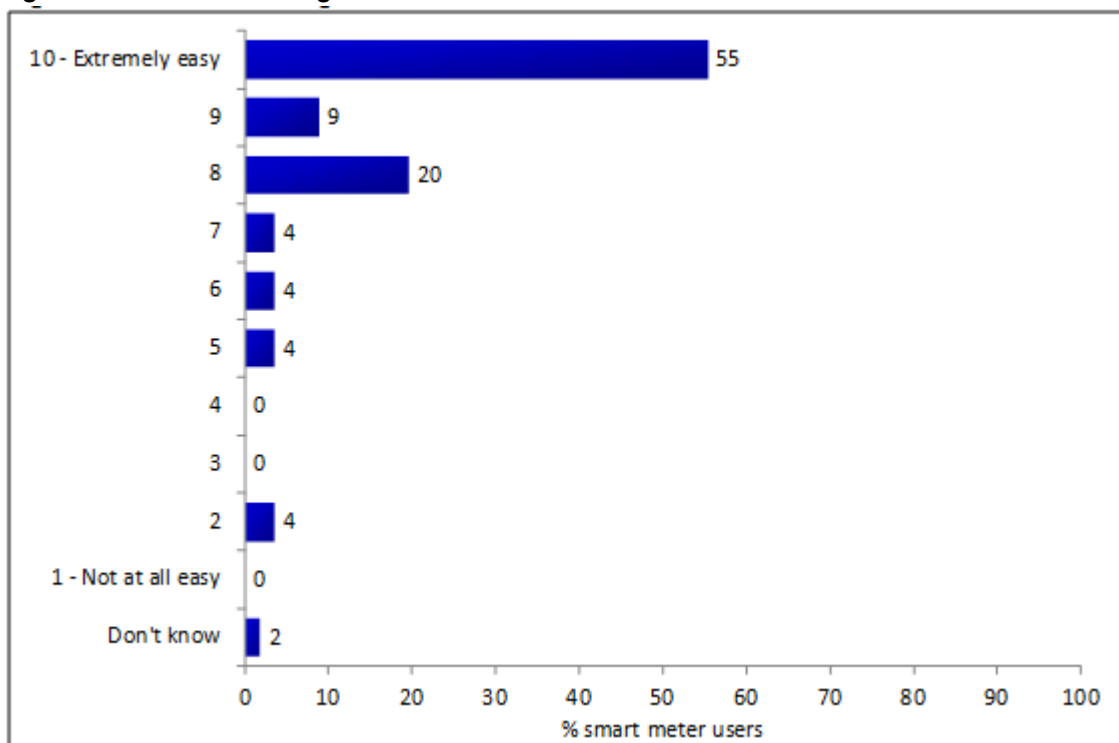
Figure 11 How regularly the data from smart meter is viewed



Base: Those who are viewing their smart meter data in any way (56)

Overall, smart meter users find it easy to view the data using their preferred method. On a scale of 1 to 10 where 1 means 'not at all easy' and 10 means 'extremely easy,' a large majority (84 per cent) give a score of between 8 and 10. Over half (55 per cent) of the total rate it as 10 out of 10. The overall mean score is 8.8.

Figure 12: Ease of viewing the data from the smart meter



Base: Those who are viewing their smart meter data in any way (56)

3.5 Benefits and Expectations

One fifth of smart meter users are unable to recall or are unaware of any benefits being communicated to them prior to installation. However, others were told of the benefits in advance, with the main ones being as follows:

- 30 per cent: the meter offers new ways to top up the meter⁴
- 26 per cent: how much energy has cost over a period of time
- 24 per cent: how many units of energy are being used live at any single point in time
- 20 per cent: how much energy is costing live at any single point in time
- 20 per cent: how many units of energy have been used over a period of time.

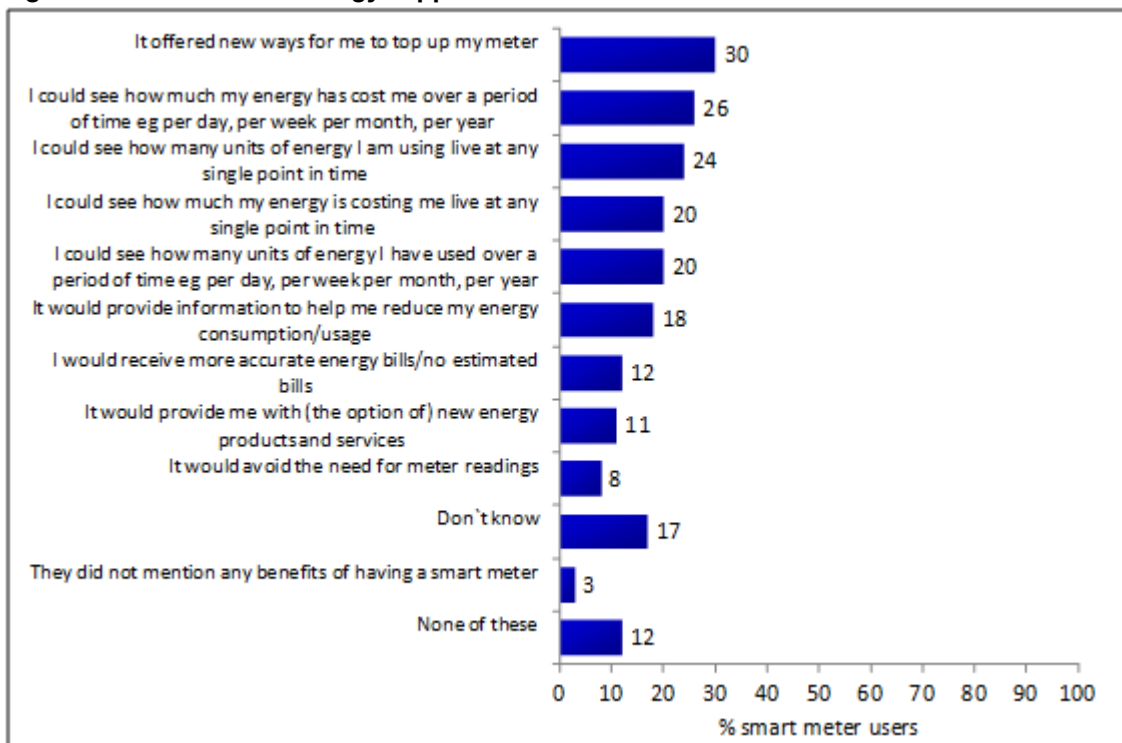
Results from the depth interviews also corroborate the finding that the reason why people had requested or come to agree to the installation of smart meters are largely the same as the benefits they had expected and/or had been told about by the supplier. In some cases, the immediate benefits of the smart meter functions have translated into real energy savings. In the words of one smart meter user:

“It gave me a way of working out not to use too much electric, when to use it, a bit more understanding with my gas as well. Before I... plugged all the appliances in and let them run but I learnt and taught my son not to; switch off at the switches and that sort of saved my electric and gas a lot more.”

Female, Aged 35-49, Social Class B, Ovo, Prepayment customer

⁴ This consisted mostly of prepayment customers (95% of customers who know they are prepayment or credit customers)

Figure 13: Benefits the energy supplier told users about before smart meter installation



Base: All smart meter users (70)

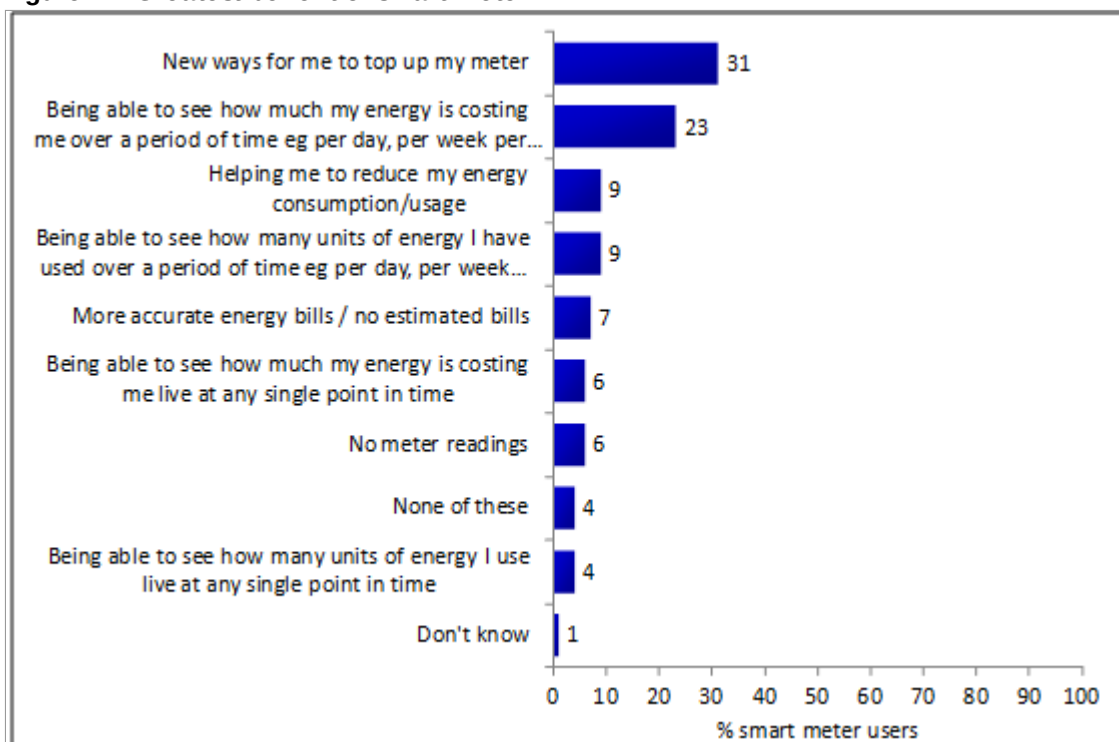
Post installation, the main smart metering benefits are seen as:

- 31 per cent: new ways of topping up the meter
- 23 per cent: being able to see how much energy is costing over a period of time
- 9 per cent: helping to reduce energy consumption or usage
- 9 per cent: being able to see how many units of energy have been used over a period of time.

There are some statistically significant variations in answers across energy providers:

- a larger proportion of Southern Electric customers (67 per cent) than British Gas (6 per cent) and Utilita customers (4 per cent) say that more accurate energy bills/no estimated bills is the greatest benefit of having a smart meter
- and a larger proportion of Ovo customers (65 per cent) than British Gas customers (17 per cent) see new ways for them to top up their meter as the greatest benefit

Figure 14: Greatest benefit of smart meter



Base: All smart meter users (70)

Responses to a series of statements show that the majority of smart meter users are benefiting from smart meter functionality. However, some feel they are not:

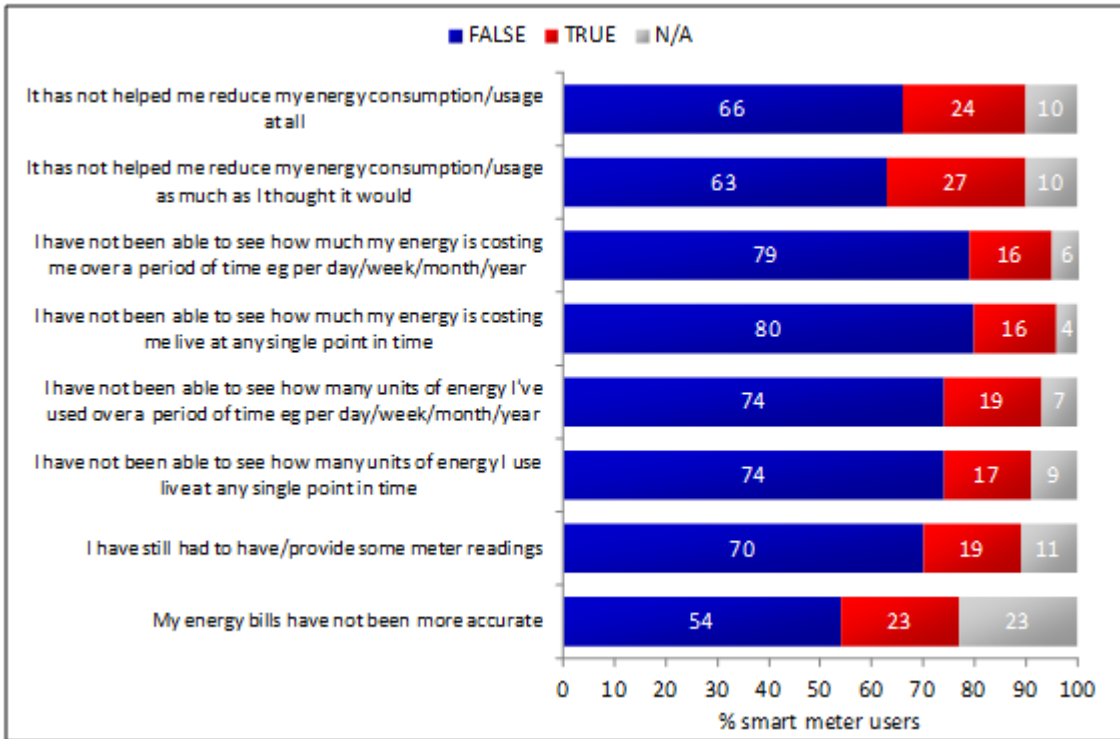
- 27 per cent: the smart meter has not helped reduce energy consumption or usage as much as users thought it would
- 24 percent: the smart meter has not helped reduce energy consumption or usage at all
- 23 per cent: bills have not been more accurate
- 19 per cent: have not been able to see how many units of energy used over a period of time
- 19 percent: have still had to provide some meter readings.

There are some statistically significant variations in answers across energy providers:

- a larger proportion of Utilita customers (92 per cent) than Ovo customers (59 per cent) are able to see how many units of energy they are using over a period of time
- a larger proportion of Utilita customers (88 per cent) than Ovo customers (41 per cent) say that the smart meter has helped them reduce their energy usage
- however, a larger proportion of British Gas customers (33 per cent) than Utilita customers (4 per cent) are not able to see how much their energy is costing them over a period of time

These findings were confirmed in the depth interviews. Most smart meter users are satisfied with their smart meters, with the main issues reported being faults with the installation and a time lag between top-up payments and credit values being updated.

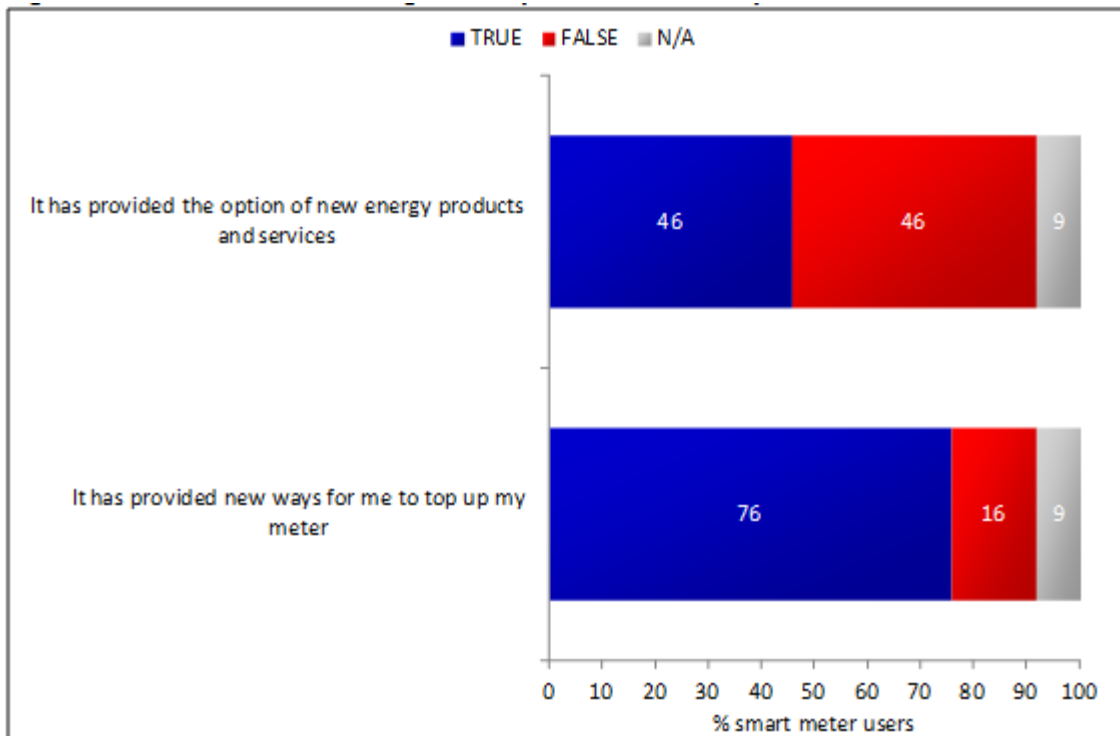
Figure 15: Smart meter user experiences. NB "False" is positive



Base: All smart meter users (70)

Just over three quarters of smart meter users (76 per cent) – in line with the number of pre-payment households surveyed – agree that the smart meter has provided them with new ways to top up the meter. However, only around half of all users (46 per cent) think that the smart meter has provided the option of new energy products and services.

Figure 16: Which of the following have you experienced with respect to your smart meter



Base: All smart meter users (70)

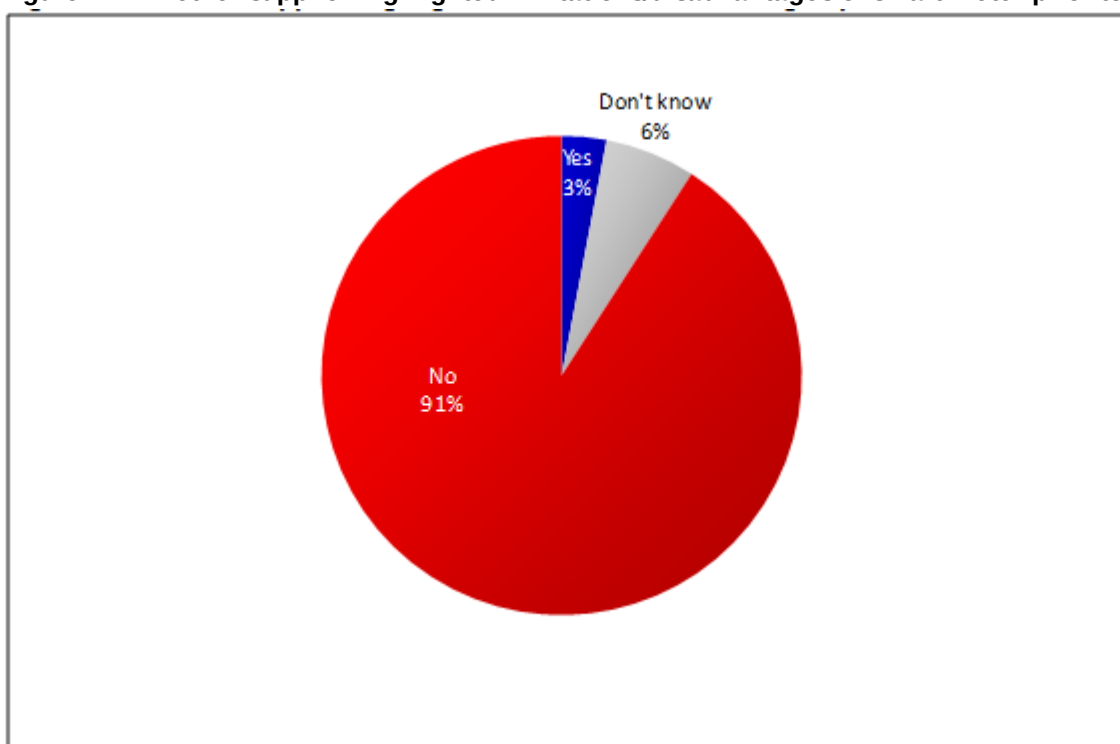
3.6 Potential Future Issues

Smart meter users were asked a set of questions to explore their understanding of SMETS1 issues, including awareness of, and attitudes towards, potential loss of smart functionality on switching.

Awareness of smart metering limitations

The vast majority (91 per cent) of smart meter users were not told about any limitations or disadvantages by their energy supplier prior to the installation. Only a small proportion (3 per cent) were. The depth interviews confirm that very few smart users have been made aware of any limitations or disadvantages prior or at the time of the installation. This indicates that energy suppliers may not be adhering to the licence conditions which require them to make consumers aware of this or at least that current communications are not achieving their intended goal.

Figure 17: Whether supplier highlighted limitations/disadvantages of smart meter prior to installation

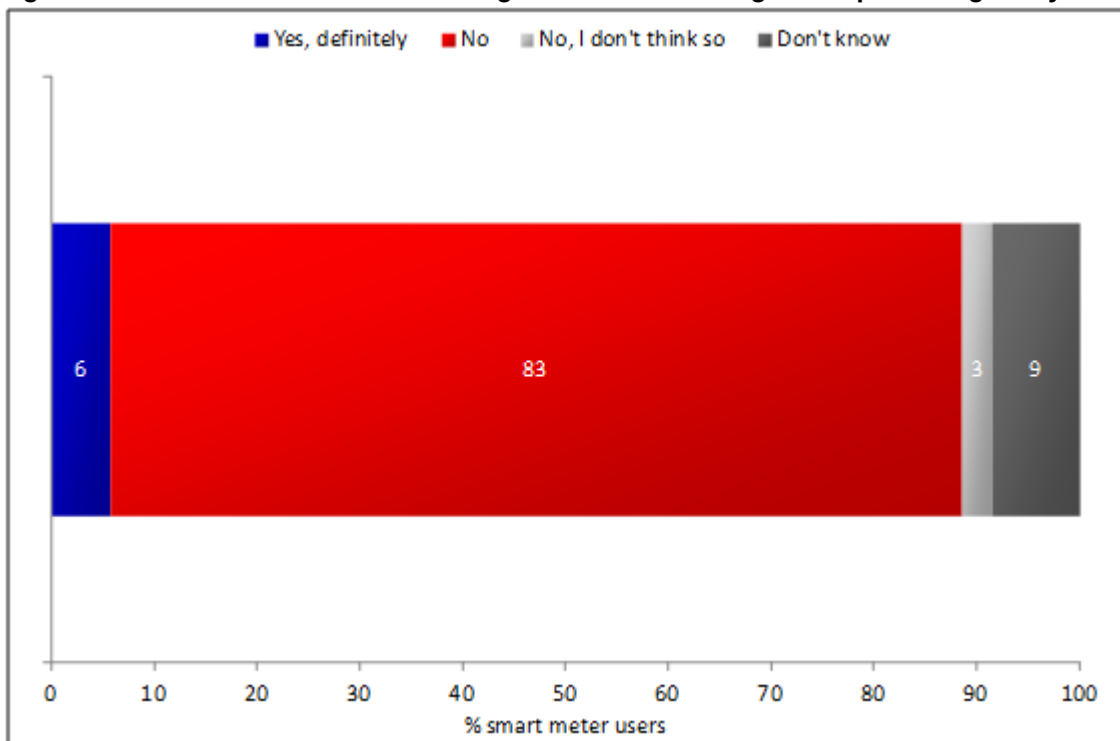


Base: Those who were aware of getting a smart meter prior to installation (66)

Awareness of need for future updates or meter replacements

83 per cent of smart meter users were not told by their energy supplier or installation company that the smart meter might need to be changed or updated again in the future ; only 6 per cent were. The depth interviews confirm that the vast majority of smart users had neither been told by the supplier or installer about potential function loss nor were they aware of it at the time of the interview.

Figure 18: Whether told smart meter might need to be changed or updated again by 2020



Base: All smart meter users (70)

The data shows that the 4 smart meter users that were alerted to the possibility of a meter change before 2020 are unclear about why. Three state simply that their meter would need to be changed, replaced or updated, but they are unsure why. The other said that it would need to be changed if it stops working. This lack of clarity also comes through in the depth interviews:

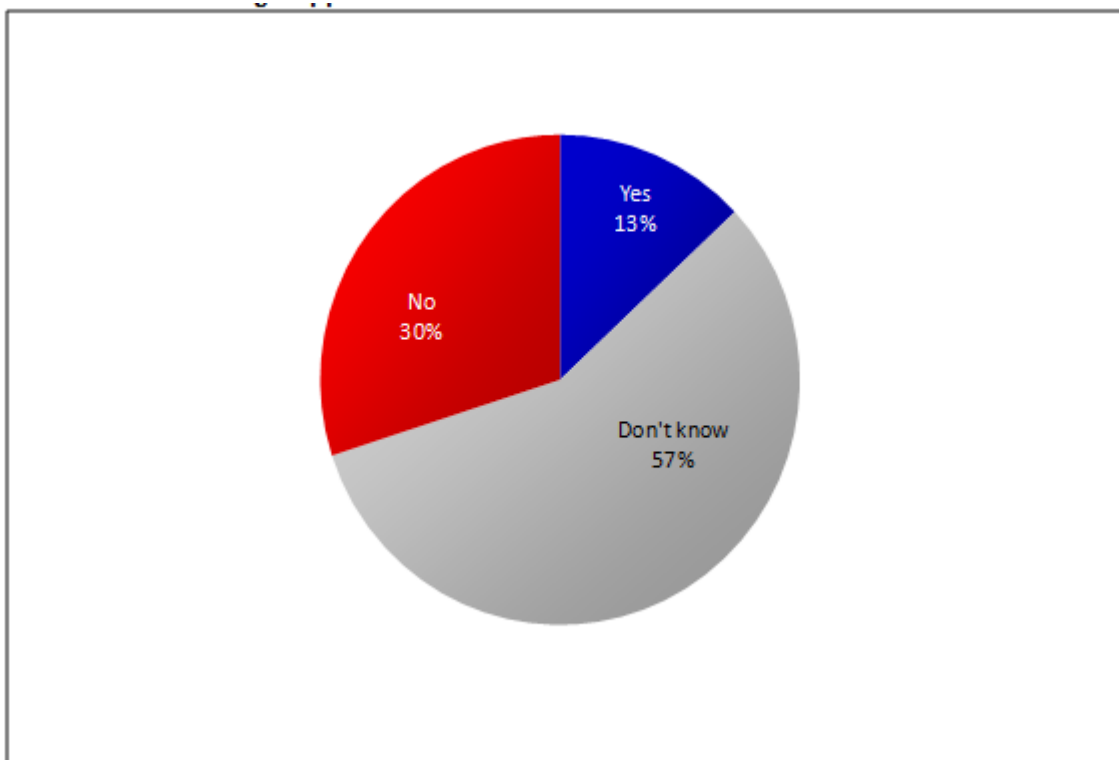
“Yeah they said something about that... they said in the future mine would need to be updated, but...I don't see why they said it because, if it's a new meter, and it's new technology, why does it need updating?”

Female, Aged 50-64, Social Class E, British Gas, Prepayment customer

Awareness of potential function losses if customers switch supplier

There is also a lack of clarity about what might happen if smart meter users switch. The majority (57 per cent) do not know whether their access to smart meter data or functionality would be affected if they were to change to another energy supplier. Just under a third (30 per cent) do not think that it would be affected; 13 per cent think that it would.

Figure 19: Awareness of whether access to smart meter data or functionality would be affected on switching supplier



Base: All smart meter users (70)

Among the small number of smart meter users who think that functionality would be affected when changing suppliers, the three most commonly stated effects are:

- losing new means to top up a prepayment meter
- not being able to have a smart meter
- the smart meter would switch off.

Table 6 shows all responses given by those who think that smart meter functionality would be affected should they switch energy supplier (multi-coded responses). Frequencies rather than percentage figures are shown given the low base size.

Table 6: Ways in which smart meter data or functionality would be affected when switching energy supplier

	Frequency n=
Lose/lost new means to top up	2
Might not be able to have a smart meter	2
Smart meter would switch off	2
Lose/lost the ability to have more accurate energy bills	1
Lose/lost the ability to avoid meter readings	1
Not able to see how many units of energy used live at any single point in time	1
Not able to see how many units of energy used over a period of time eg per day, per week per month, per year	1
Not be able to see how much energy costs are live at any single point in time	1

Not able to see how much your energy costs were over a period of time eg per day, per week per month, per year	1
Lose/lost the information needed to help support a reduction in energy consumption/usage	1
Loss of certain smart functions	1
Would have to wait for new card	1
Will receive new smart meter	1
Base (LOW)	9

Those who think that the functionality would be affected found out about this from their supplier before the meter was installed or from their own enquiries or research. This is shown in Table 7 (frequencies rather than percentage figures are shown given the low base size).

Table 7: Way in which participants found out that smart meter data or functionality would be affected if they switch to a new supplier

	Frequency n=
The supplier that installed it told me it would before the meter was installed	3
Enquiries/research	3
A call from another supplier	2
The supplier I moved to told me it would	1
Base (LOW)	9

The majority of those who believe that the functionality would not be affected when changing suppliers do not know why they think this. These aside, the two most commonly given reasons are that most suppliers have smart meters and that the smart meter users are good with technology.

Table 8 shows all responses given by those who think that smart meter functionality would not be affected (multi-coded responses). Frequencies rather than percentage figures are shown given the low base size.

Table 8: Why participants think that functionality would not be affected

	Frequency n=
Most suppliers have/do smart meters	3
I'm good with technology and can fix the problem	2
The supplier that installed it told me it wouldn't	1
Suppliers offer the same deals	1
Supplier would compare old meter to new	1
Same as switching with a normal meter	1
Other	1
Don't know	11
Base (LOW)	20

A small number of smart meter users (6 participants) think that functionality would be affected when changing supplier, but were not told this by the supplier before the meter was installed. All 6 say that they would definitely or probably have allowed the installation to go ahead even if they had known

about it. None say that they would not have allowed it to proceed (see Table 9; frequencies rather than percentage figures are shown given the low base size.)

Table 9: Whether participants would have allowed the installation to go ahead if they had known that they might lose some functionality when switching energy supplier

	Frequency n=
Yes, definitely	5
Yes, probably	1
Base (LOW)	6

Table 10 shows the reasons why they would definitely or probably have allowed the installation to go ahead. This shows that, in most cases, the benefits it offers them currently outweigh possible future issues with switching.

Table 10: Reason why participants would have allowed for the installation to go ahead if they had known they may lose some functionality when switching energy supplier

	Frequency n=
New/better ways to top up	2
To save money	1
Easier/more convenient	1
Can monitor usage/consumption	1
To see how it goes - the novelty	1
To replace/update old meter	1
Base (LOW)	6

This was explored in more depth in the qualitative interview stage, where all smart meter users who were not aware of potential functionality loss when switching suppliers were given information provided in incremental steps during the course of the interview:

- a) potential functionality loss
- b) potential functionality loss would eventually be rectified
- c) the second generation smart meters to be introduced later in 2016 would not have this limitation

After each piece of information was given, they were asked whether they would have gone ahead with the installation. Initially, most interviewees say they would have gone ahead despite the potential functionality loss. Reasons cited are diverse and include the following:

- not all of the smart functions are being used, so losing them would not be a barrier
- they have the benefit of being able to monitor usage at present before switching
- they are not intending to switch suppliers and so won't lose functionality.

One common reason for going ahead is the financial incentive they had been offered for switching over to a smart meter as the following example shows:

"I still would have done yeah because the woman said we can charge you 10.5p, instead of 16 or 14..., and I thought fair enough"

Male, Aged 35-49, Social Class C2, Utilita, Prepayment customer

However, once told that if they had waited for the second generation of smart meters the issues would have been rectified, some (although a minority) show a preference to wait:

“If I had known there’s a new one coming out, I probably would have waited a bit... To save the hassle of getting changed over. It takes a bit of time. You’ve got to wait and plus to have it put in and taken out and put in again)”

Male, Aged 35-49, Social Class D, British Gas, Prepayment customer

Furthermore, some interviewees are not pleased over not being told about potential functionality loss in future, although the overall customer experience is more important to them:

“To be honest I’m a bit upset I wasn’t told...” Female, Aged 50-64, Social Class E, British Gas, Prepayment customer

However, for a small minority who are considering a switch, the uncertainty surrounding functionality loss of the smart meter is a more significant concern:

“My father had a smart meter installed, and then when he changed supplier they said they couldn’t use it.... That was First Utility and Scottish Power said they couldn’t use it, which is a bit of a worry I’m thinking because we’re about to change supplier, so I don’t know... I just thought of it yeah, because I’m just about to literally this week change energy supplier to a green supplier, and I don’t know what changing with a smart meter now is like, or now that we’ve got solar panels.”

Female, Aged 50-64, Social Class D, First Utility, Credit customer

Smart metering functions Interviewees would least like to lose

Driven by the profile of smart meter users surveyed, new ways of topping up the meter is the function that smart meter users would be the least happy about losing, stated by just over a third (34 per cent). This is the main, if not the only function pre-payment customers care about. As one smart meter user explains in a depth interview:

“I only ever use the app, if I couldn’t top up when I need to then I’d be a bit disappointed but generally that’s the only thing I used it for because I don’t know anything else about it.”

Female, Aged 16-34, Social Class E, Ovo, Prepayment customer

The other key functions users would not like to lose are:

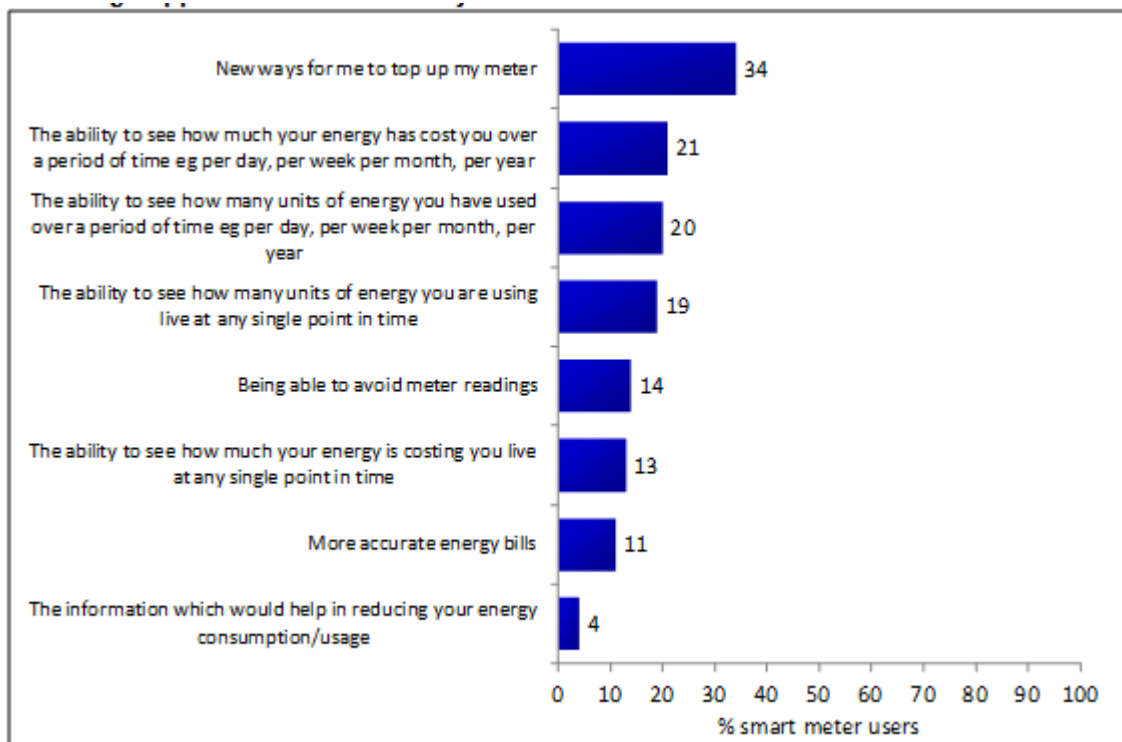
- 21 per cent: seeing how much energy has cost over a period of time
- 20 per cent: seeing how many units of energy have been used over a period of time (20 per cent)
- 19 per cent: seeing how many units have been used live at any single point in time

In the depth interviews, some smart meter users say it would be difficult for them not to be able to monitor their usage anymore. In the words of one smart meter user:

“[I’d be] a little bit lost to be honest because of not knowing what I’m using, how much I’m spending a day, so I’d find it very, I think, upsetting.”

Male, Aged 35-49, Social Class B, Utilita, Prepayment customer

Figure 20 Which functions of the smart meter would you be least happy about losing on switching supplier if you were to lose any?



Base: All smart meter users (70)

Comments made by participants in the qualitative research suggests that a minority feel negatively towards their supplier over the potential loss of smart meter data and functionality. This includes being annoyed that adjustments may need to be made to fix the problems in the future. For some it made no difference, for others the negative perceptions are balanced against the positive experiences they have had with their supplier up to this point:

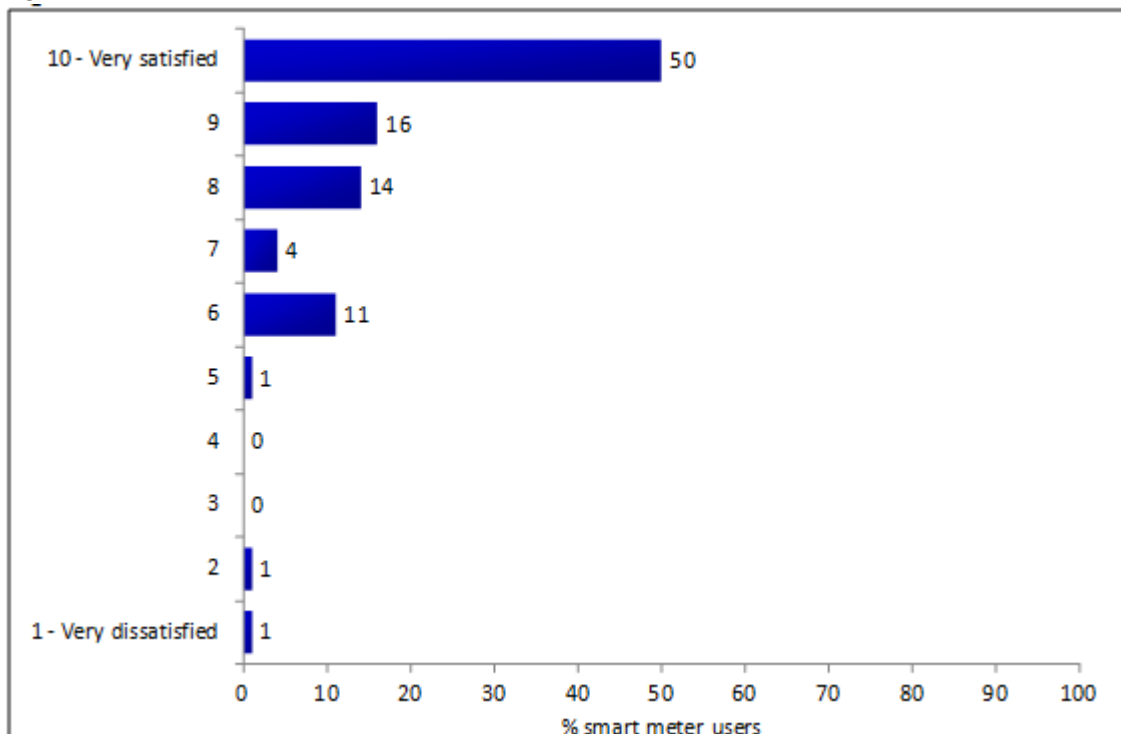
“To be honest I’m a bit upset I wasn’t told but I’m still happy with them because I’ve had no bad dealings with them other than not being told about the future.”
 Female, Aged 50-64, Social Class E, British Gas, Prepayment customer

“I don’t know really, probably a little bit annoyed because I’ve got to go through it all again but I’d still keep a smart meter.”
 Female, Aged 35-49, Social Class B, Ovo, Prepayment customer

3.7 Overall Satisfaction

Overall, current satisfaction with smart meters is very high as 80 per cent of users give a rating between 8 and 10 on a scale where 1 means 'very dissatisfied' and 10 means 'very satisfied.' In fact, half (50 per cent) give a rating of 10 out of 10. The overall mean score is 8.7. There is no significant variation in satisfaction between those who were and those who were not given a choice over having a smart meter installed (8.7).

Figure 21: Overall satisfaction with the smart meter



Base: All smart meter users (70)

Among those who give a low satisfaction rating of 1 to 5 (3 participants), the reasons given are a faulty smart meter or system, still providing estimated readings, poor customer service or communication and supplier slow to rectify fault. These findings are shown in Table 11 where frequencies rather than percentage figures are shown given the low base size.

Table 11: Reason for giving a low satisfaction rating (1 to 5)

	Frequency n=
Faulty SM/system	2
Still providing estimated readings	2
Poor customer service/communication	2
Supplier slow to rectify fault	1
Base (LOW)	3

The results from the depth interviews show that, overall, those who are using an IHD think the smart meter has met or even exceeded their expectations. For example, one smart meter user talks of how it has helped increase his understanding of their energy consumption:

“I’d probably say it’s working out better than I anticipated but that might be just down to the fact that, if nothing else, it’s made us more aware of things, and start to question, look at things a bit more, understand a bit more.”

Male, Aged 50-64, Social Class C2, Utilita, Prepayment customer

The depth interviews show that the main reason given for the smart meter failing to meet users' expectation is the inability to monitor live usage at a more detailed level. One smart meter user who had not been offered an IHD explains that she would have expected to be able to detect unnecessary use of electricity:

"I have to say it's not as detailed as I thought it would be if what I'm looking at is correct because I'm looking at usage... It gives you an option of monthly, weekly, daily ...so it's showing daily cost of how much say for instance £2 whatever a day but it doesn't break it down... maybe that's just me being ignorant, I thought the smart meters would pick up that you've maybe got sockets plugged in and not switched off.. "

Female, Aged 35-49, Social Class B, Ovo, Prepayment customer

4. FINDINGS: NON-SMART METER USERS

4.1 Introduction

The following section details the key findings from the research conducted with consumers who do not have a smart meter installed. This comprises 70 telephone surveys and 15 in-depth interviews. The findings from quantitative and qualitative elements of this research are presented alongside each other.

4.2 Demographics

The achieved profile of non-smart meter users in terms of age, socio economic grouping (SEG) and payment type is shown below in Table 12 to Table 14. As discussed in Section 2.3, the age and SEG profile is broadly representative of the GB population. When these tables are compared to Table 2 to Table 4, the data suggests that there are fewer elderly households with smart meters than traditional meters, more C2DEs and more prepayment customers. This is the case at least amongst our sample which should be taken as indicative rather than statistically robust for the reasons cited in Section 2.3.

Table 12: Non Smart Meter Participant Profile by Age

	Number	per cent
16-34	11	16
35-49	26	37
50-64	21	30
65-74	8	11
75+	4	6

Base: all smart meter users – 70

Table 13: Non Smart Meter Participant Profile by Socio Economic Group

	Number	per cent
ABC1	34	49
C2DE	36	51

Base: all smart meter users - 70

Table 14: Non Smart Meter Participant Profile by Method of Paying for Energy

	Number	per cent
Pre-payment	27	39
Credit (cash, cheque, DD)	41	59
Don't know	2	3

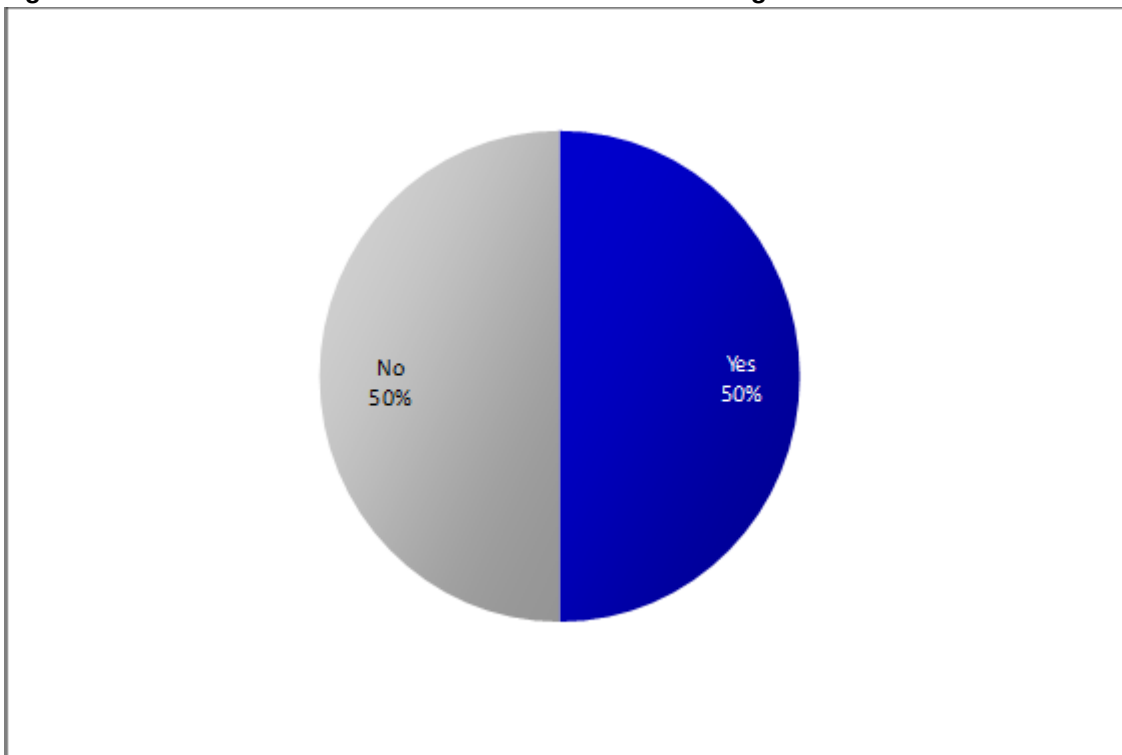
Base: all smart meter users - 70

4.3 Benefits/Expectations of Smart Meters

All non-smart meter users were asked a set of questions to explore their levels of awareness and expectations of the functions and benefits of smart meters. This also includes some questions where consumers were asked to imagine a scenario in which they had a smart meter installed.

Overall, half (50 per cent) of those who do not have a smart meter installed were aware of the rollout of smart meters before being contacted for this research and the other half were not. The qualitative research shows that non-smart meter holders found out through radio adverts or by word of mouth.

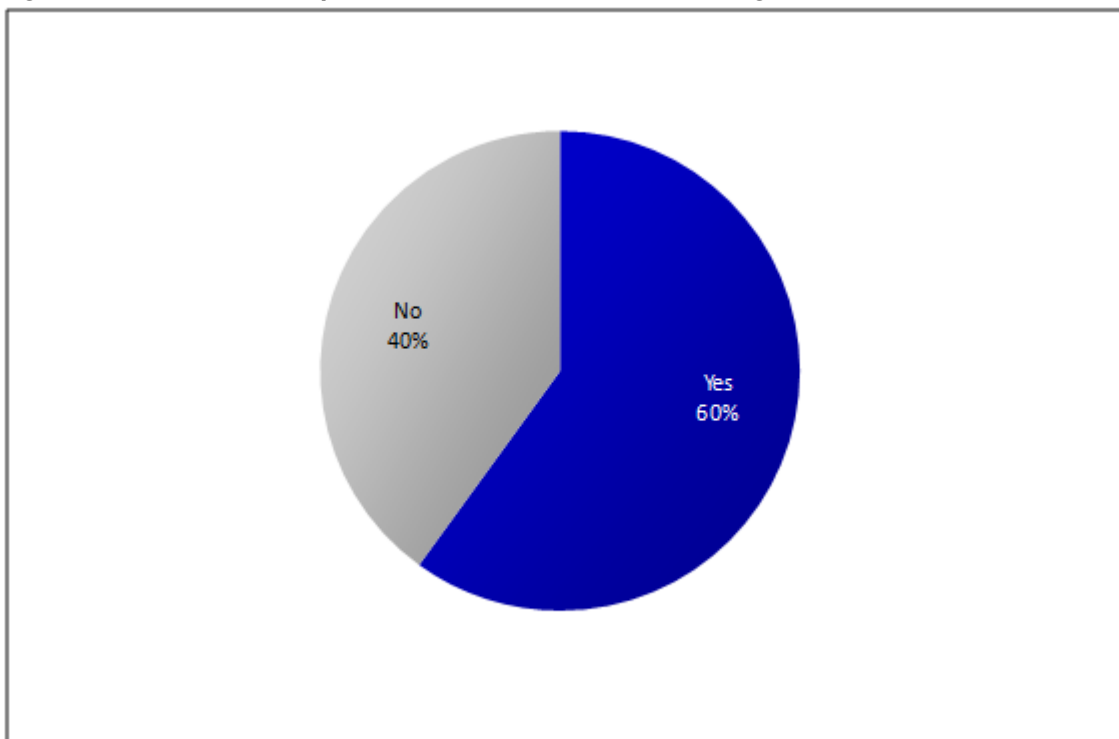
Figure 22: Awareness of rollout of smart meters before being contacted for the research



Base: All non-smart meter users (70)

Among those who were aware of the rollout, 60 per cent are also aware of some of the specific benefits of smart meters to households, whereas 40 per cent are not.

Figure 23: Awareness of specific smart meter benefits among those who were aware of the rollout



Base: Those who were aware of the rollout of smart meters before being contacted for this research (35)

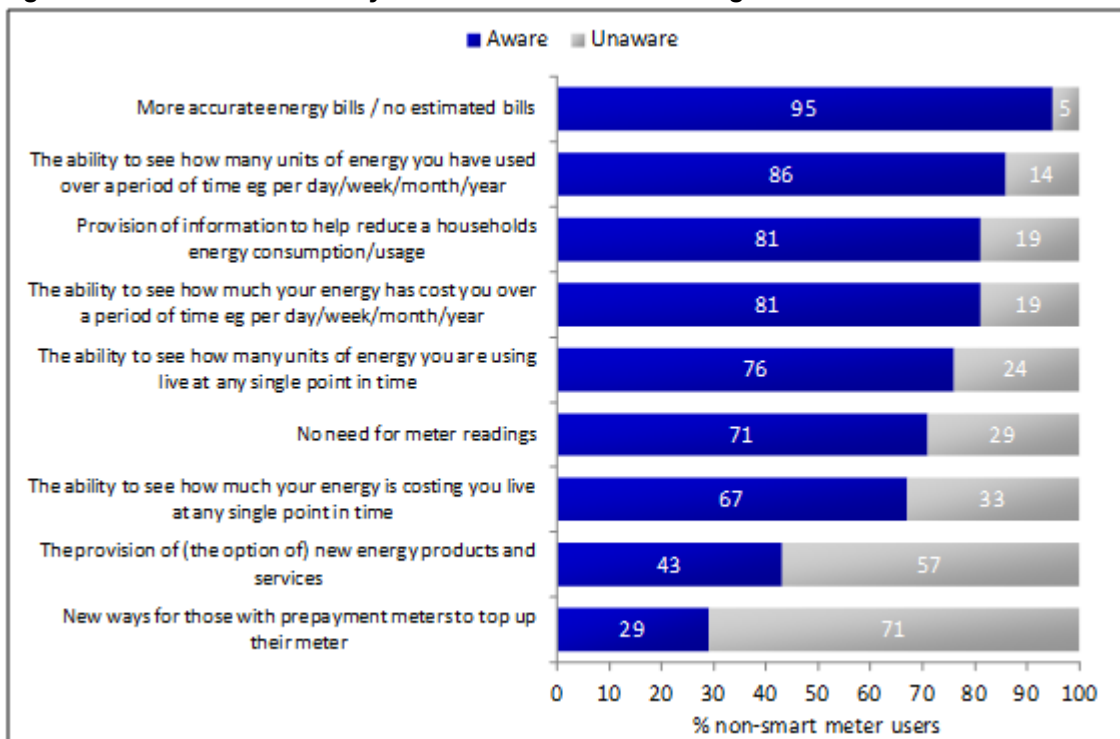
Before being contacted for this research, the four benefits that non-smart meter users were most aware of were:

- 95 per cent: that the smart meter would provide more accurate energy bills or no estimated bills
- 86 percent: the ability to see how many units of energy have been used over a period of time
81 per cent: the provision of information to help reduce energy consumption
- 81 per cent: the ability to see how much the energy used has cost over a period of time.

At the other end of the awareness scale, only 29 per cent had heard that prepayment smart meters would provide new ways of topping up the meter⁵.. Under half (43 per cent) knew about the provision of, or the option of, new energy products and services such as switching or usage analysis.

⁵ However, among participants who have a smart meter, awareness of this function is higher, with 6 out of 7 being aware.

Figure 24: Which benefits they were aware of before being contacted for this research



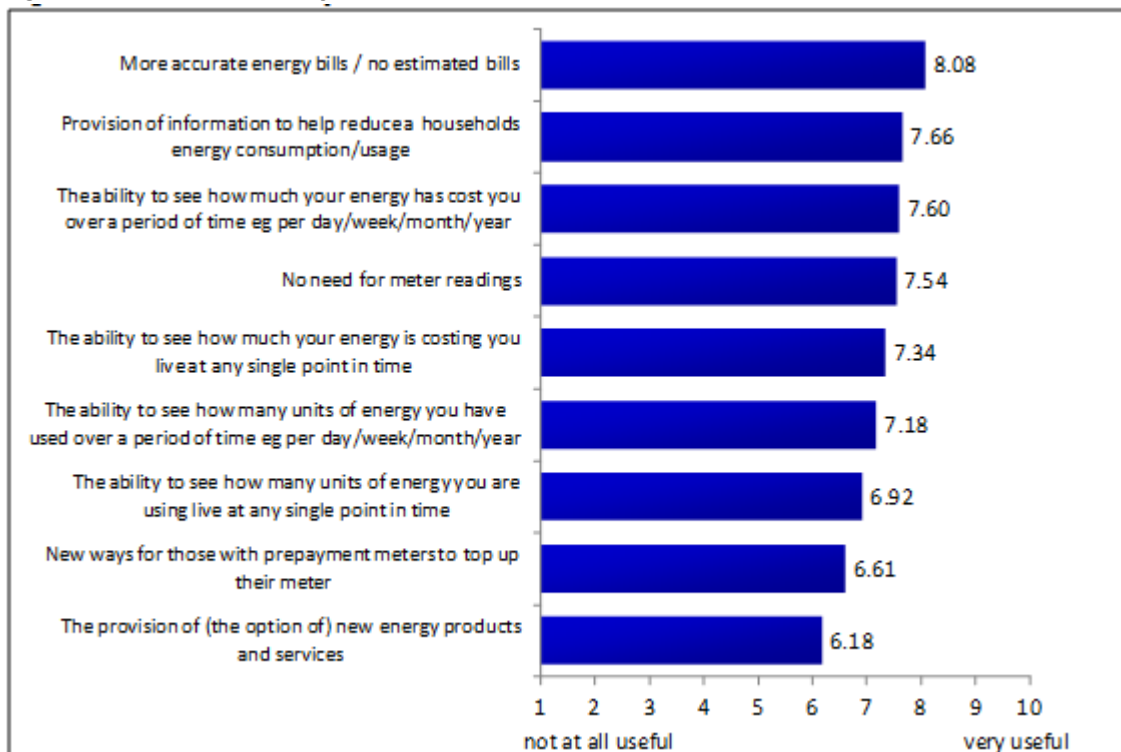
Base: Those who are aware of any of the specific benefits of smart meters to households (21 – **LOW BASE SIZE**)

Non-smart meter users were asked to rate different smart meter functions based on how useful they think they would find them on a scale of 1 to 10, where 1 means ‘not at all useful’ and 10 ‘very useful.’ The most useful functions are as follows:

- 8.1 out of 10: more accurate energy bills or no estimated bills
- 7.7 out of 10: the provision of information to reduce energy consumption
- 7.6 out of 10: the ability to see how much energy has cost over a period of time
- 7.5 out of 10: 6 no need for meter readings. .

The provision of new energy products and services is given the lowest rating 6.2 out of 10) in terms of its usefulness.

Figure 25: How useful they would find different smart meter functions – mean score



Base: All non-smart meter users who gave a rating (bases of 62-68)

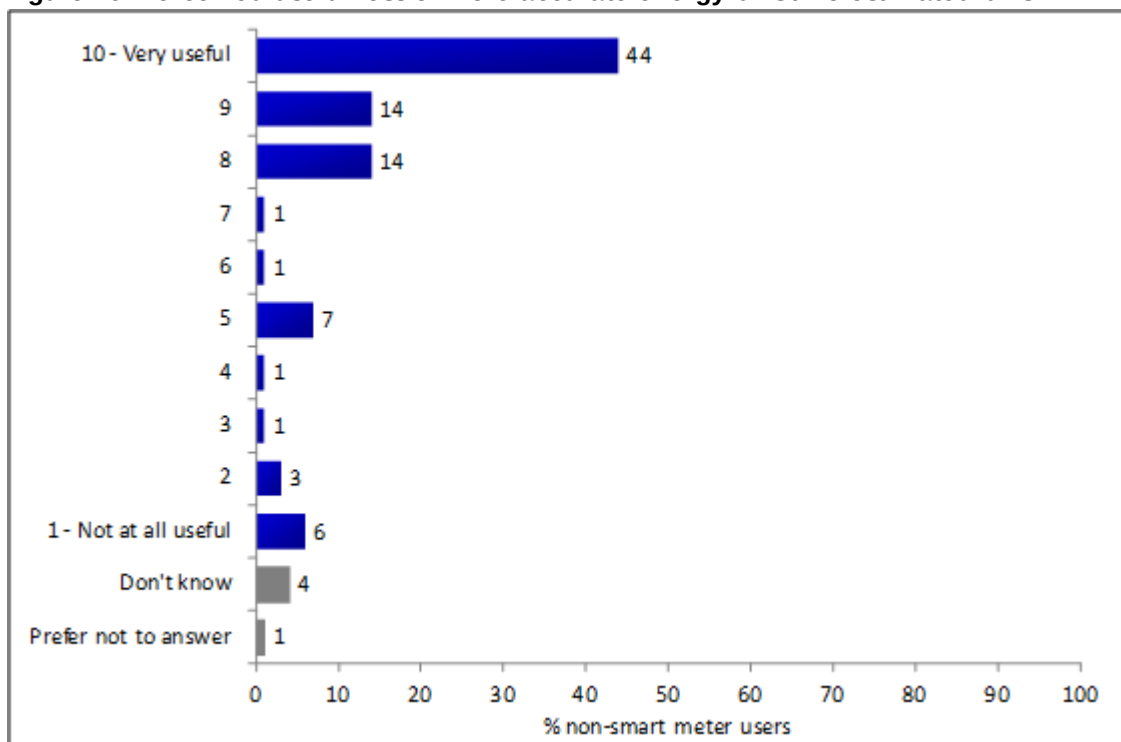
Benefits and expectations for each smart metering function

A detailed breakdown of scores for each of these functions is shown below in Figure 26 to Figure 34. They show how useful each function is perceived by non users on a scale of 1 to 10, where 1 is 'not at all useful' and 10 is 'very useful'. These reflect the findings from the depth interviews where appeal of each was also explored.

More accurate energy bills / no estimated bills

This is the most highly rated function of smart meters among non users. Almost three quarters of participants (72 per cent) gave it a usefulness rating of 8 to 10, with 10 being the highest rating possible ; 44 per cent give a rating of 10 out of 10.

Figure 26: Perceived usefulness of more accurate energy bills / no estimated bills



Base: All non-smart meter users (70)

In the depth interviews, several participants commented on the value of no longer receiving estimated bills and the associated over or underpayments involved when the meter is finally read. Another value of accurate billing identified by research participants, is in situations where they are considering a switch to a new supplier. The accurate bills can be used to inform discussions about energy consumption levels with the potential new supplier.

Those who would not find smart metering useful are either prepayment customers who feel bills are not relevant and one participant who felt they are aware of how much energy they use and know what to expect when billed.

The following quotes from the depth interviews show examples of non smart meter users' reactions to the idea of having more accurate energy bills and no estimated bills:

"I'd definitely find it useful because sometimes you have a shock when you get a large bill and you look at it and think it's been estimated so I'd rather it's accurate so I know where I am with my bill."

Female, Aged 35-49, Social Class B, Credit customer

"[I] like it. You know where you are. You're not thinking am I paying more than I should be or am I not paying enough? "

Female, Aged 16-34, Social Class C1, Prepayment customer

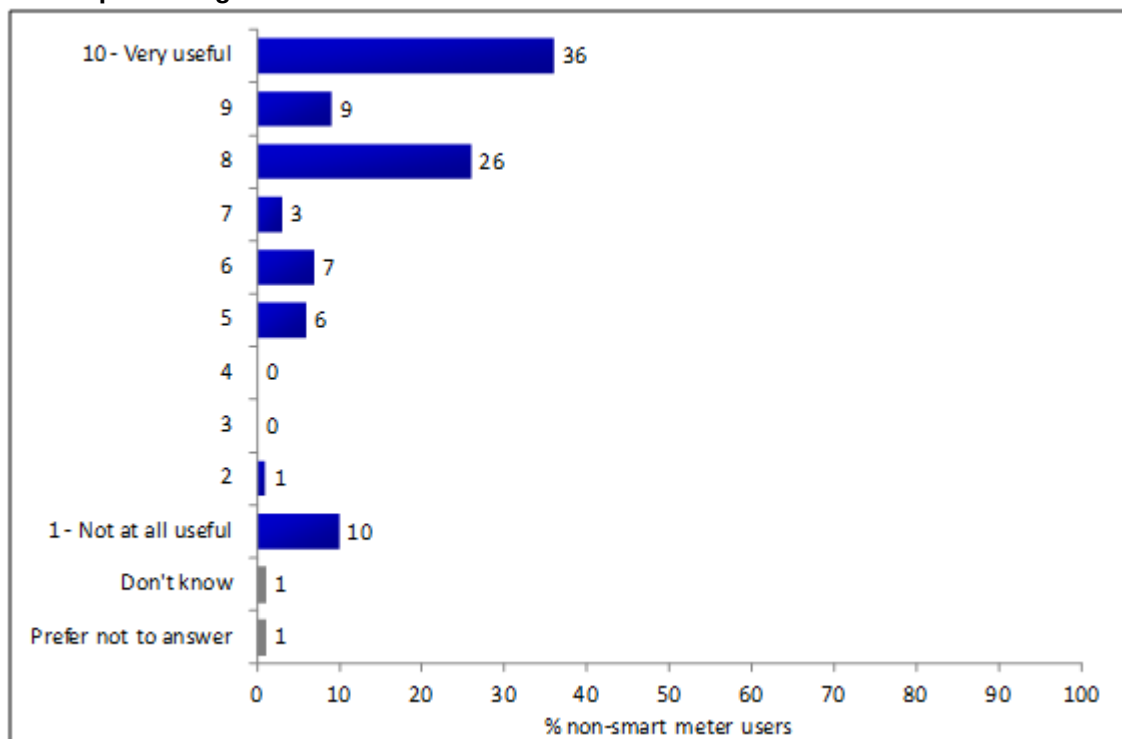
"Well I have a pre-paid meter so we get statements that say how much our gas and electricity was and to be quite honest, we don't even read them because we just pay for it as we use it. I don't know how that would benefit us."

Female, Aged 50-64, Social Class A, Prepayment customer

Provision of information to help reduce a household's energy consumption/usage

73 percent of non users give this function a usefulness rating of 8 to 10, with 10 being the highest rating. Over a third (36 per cent) give a rating of 10 out of 10. However, 10 per cent think that this would not be useful at all and give the lowest possible rating of 1.

Figure 27: Perceived usefulness of provision of information to help reduce a household's energy consumption/usage



Base: All non-smart meter users (70)

In the depth interviews, participants were asked about the value of having access to information that can help reduce energy consumption. The main perceived value of this is as an aid to reducing energy use for both financial and environmental purposes. Participants viewed it as being valuable in demonstrating to those less aware of energy use levels how much can be saved.

Those who would not find this function valuable feel they have already cut energy use as far as possible or do not believe a smart meter can provide useful information on energy saving.

Below are some examples from the depth interviews of non smart meter users' perceptions of this smart metering function:

"Anything that can save money and also I think it's important for younger people to realise that we do have to, not just save energy for money, but at some point we're going to run out of some of our resources so I think everyone has to be a bit more sensible I think today."

Female, Aged 50-64, Social Class B, Credit customer

"It would be good to be more aware so that you can be more cautious and you're not just like wasting gas and electric and spending more because you're being careless leaving things on or overfilling the kettle or whatever it might be. "

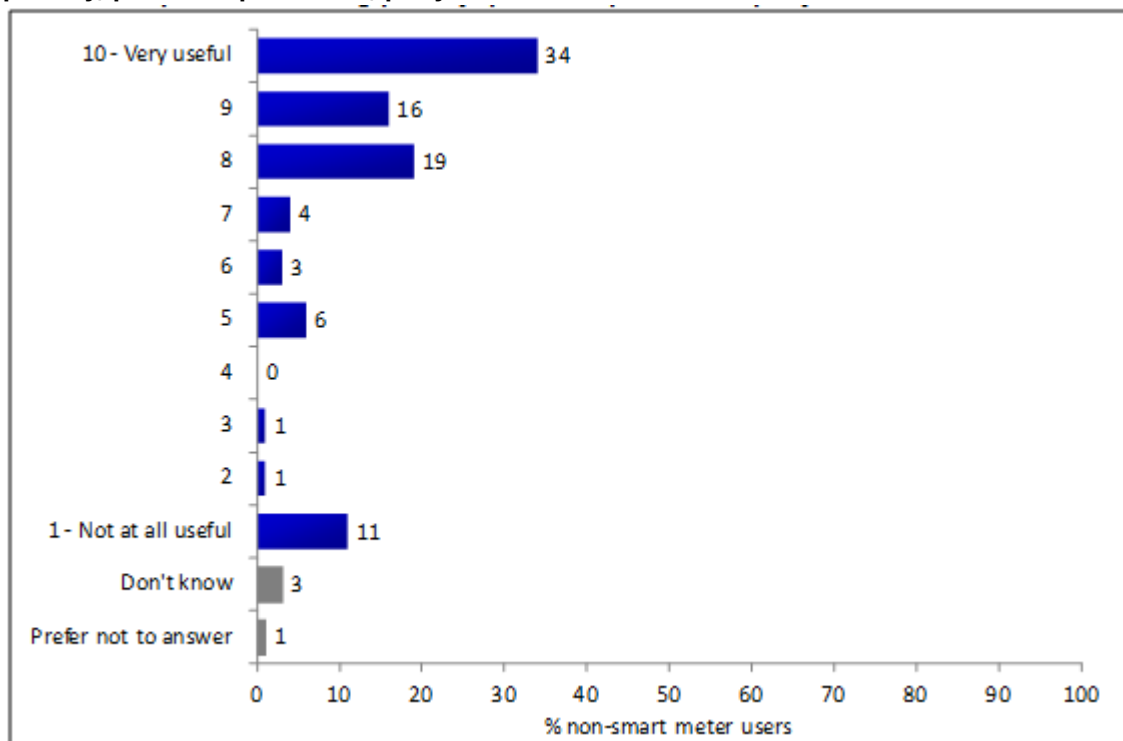
Female, Aged 16-34, Social Class C1, Prepayment customer

"I don't think smart meters give you that information [ie on ways to save energy] they just give you the facts don't they [ie facts about energy usage]."

The ability to see how much energy has cost customers over a period of time eg per day, per week per month, per year

Just over two thirds of participants (69 per cent) rate the usefulness of being able to see how much energy has cost over a period of time at 8 to 10 with 10 being the highest possible score. Around a third (34 per cent) give it a rating of 10 out of 10. However, just over a tenth (11 per cent) rate it as 'not at all useful.'

Figure 28: Perceived usefulness of the ability to see how much energy has cost over a period of time eg per day, per week per month, per year



Base: All non-smart meter users (70)

In the depth interviews, the main value of being able to see how much energy costs over a period of time identified by participants is in enabling greater control over energy consumption. They see it as particularly valuable in understanding seasonal variations in energy use. Participants also value having information on the cost of energy used in cases of billing disputes with energy suppliers, in comparing costs between energy suppliers, or in comparing pre-payment and non prepayment metering.

This function is not seen as valuable in situations where the consumer feels they have already reduced spending as far as was possible.

Below are some examples from the depths of non smart meter users' views on this smart meter function:

"Then I can challenge, say, ScottishPower, on exactly what they billed considering the Smart Meter. The electric companies and the gas companies don't actually come out to read the meters, most of the time they are guessing at what the people have used. It's like one big con."

Male, Aged 35-49, Social Class E, Prepayment customer

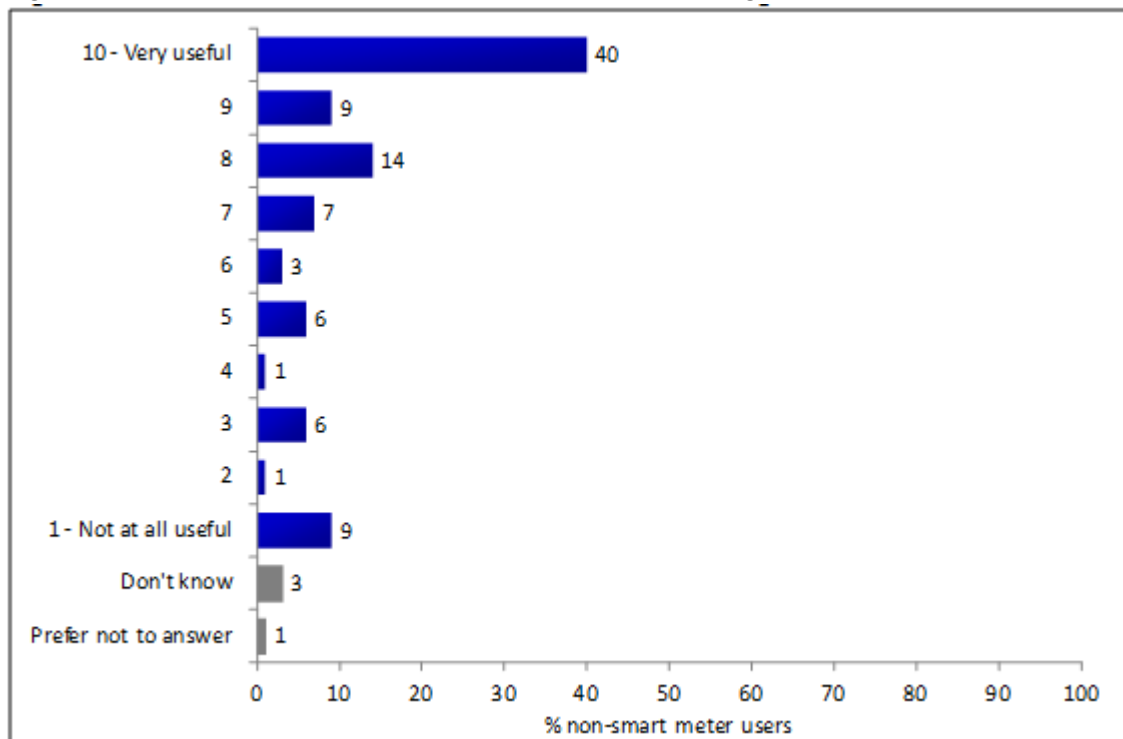
[Not useful because] "I've got my pre-payment as it were down to a fine art. I only spend between £5 and £10 a week on gas and on electricity generally speaking unless it's really cold so I mean I don't think personally I could cut it any finer."

Female, Aged 35-49, Social Class B, Prepayment customer

No need for meter readings

Non users place a high value on automated meter readings. 40% of participants give a rating of 10 out of 10 for not needing to give meter readings. just under a tenth (9 per cent), gave the lowest rating of 1 out of 10. .

Figure 29: Perceived usefulness of automatic meter readings



Base: All non-smart meter users (70)

In the depth interviews, participants considered automatic meter readings being of value because they solve a number of problems: i

- meter readers not calling to homes often enough
- difficulties in reading meters because of their inconvenient location
- householders forgetting to provide meter readings
- householders making errors in taking meter readings.

Those who were less positive about automated readings cited the following reasons:

- some meters are sited in locations where the householder does not need to give meter readers access
- no longer being able to read meters as a check on the amount householders are billed.

Below are some examples of non smart meter users' views regarding automatic meter reads:

“Brilliant, again. I’m very forgetful and you know, I’ve had texts through, oh yes, I must do that, but I’m at work at the time, so it’s, you know, it’s not at the forefront of my mind, because I’m in work. So to have to take that responsibility away, again, thumbs up.”

Female, Aged 35-49, Social Class C1, Prepayment customer

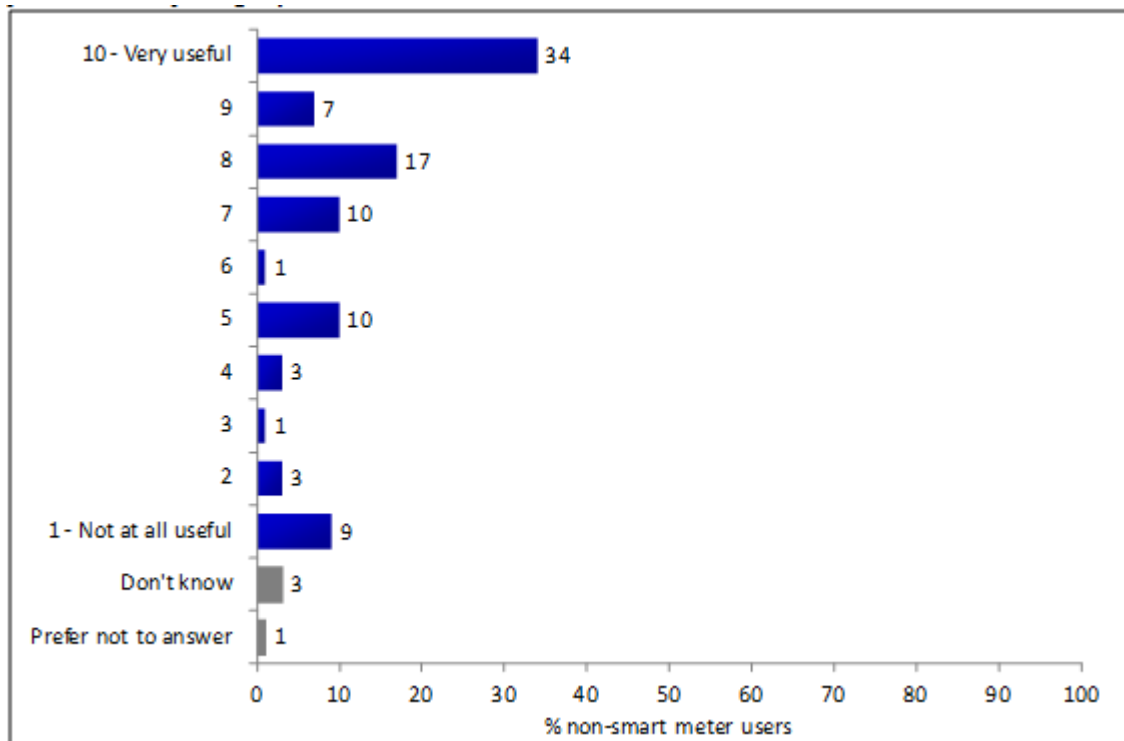
“Probably not where I am now... the meter readings are outside so it doesn’t bother me too much, they can just come and do it.”

Female, Aged 35-49, Social Class B, Credit customer

The ability to see how much your energy is costing you live at any single point in time

The majority of non-smart meter users (59 per cent) give the ability to see how much energy is costing live at any single point in time a rating of 8 to 10, with 10 being the highest score possible. Just over a third (34 per cent) give the highest possible rating of 10 out of 10. However, just under a tenth (9 per cent) give it the lowest possible rating of 1.

Figure 30: Perceived usefulness of the ability to see how much energy is costing live at any single point in time



Base: All non-smart meter users (70)

In the depth interviews, this function is valued by those wishing to know how much an individual appliance is costing to operate and the effects of reducing heating settings or turning appliances off standby. As it is near live information from an IHD, it has an immediacy about consumption levels which a time series reading would not provide. It is also perceived as being more valuable than seeing the amount of units used as it shows costs.

Negative comments made by non users about this function centre on two aspects:

- a reading of cost based on a period of time is a more realistic measure of consumption
- the perception that they have already reduced consumption as far as possible and do not need the information.

Below are some examples from the depth interviews of non smart meter users' perceptions of this smart metering function:

"That then is control, that gives you the power to control what you're running at the time, whether it be a tumble dryer, a washing machine, people don't realise how much energy these devices use, and then when they get their bills they can't understand it and they get all upset and everything."

Male, Aged 50-64, Social Class E, Credit customer

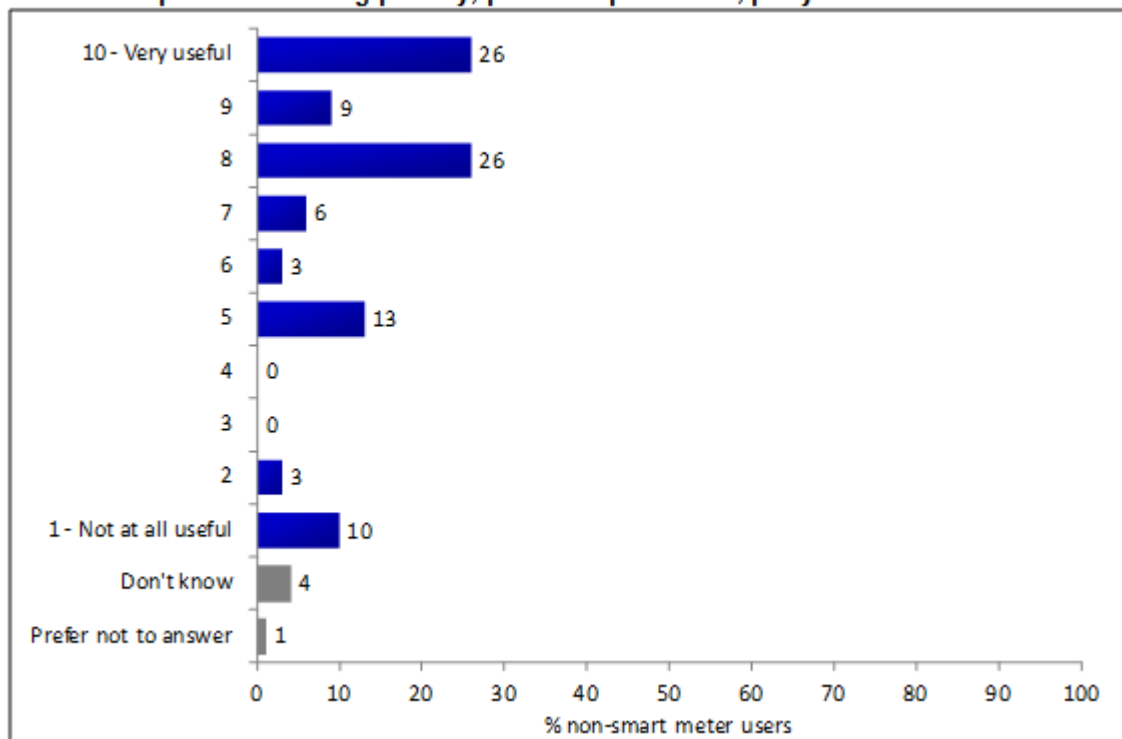
"That's less appealing because I'm unlikely to check it unless I'll just go and check it to see how much I've used in the week."

Female, Aged 16-34, Social Class C1, Prepayment customer

The ability to see how many units of energy over a period of time

61 per cent of non-smart meter users give this function a rating of 8 to 10, where 10 is the highest score possible. . Just over a quarter (26 per cent) give it the highest possible rating of 10, however, a tenth (10 per cent) give it the lowest possible rating of 1.

Figure 31: Perceived usefulness of the ability to see how many units of energy used over a period of time eg per day, per week per month, per year



Base: All non-smart meter users (70)

The value of this function is largely seen by non users as being similar to the ability to track costs of using energy over time. This includes being able to:

- compare usage over time,
- investigate causes of change in consumption over time
- be aware of seasonal fluctuations in energy consumption
- cite evidence of energy consumption in any disagreements with energy suppliers.

Below are some examples from the depth interviews of non smart meter users' views on being able to see how many units of energy is being used over a period of time:

“Not necessarily per day but per month or...yeah, per month it would be really helpful in terms of seeing what’s going on. To be honest I don’t really have faith in these companies very much so... so...if I can...observe things a bit more easily yeah!”

Female, Aged 35-49, Social Class B, Prepayment customer

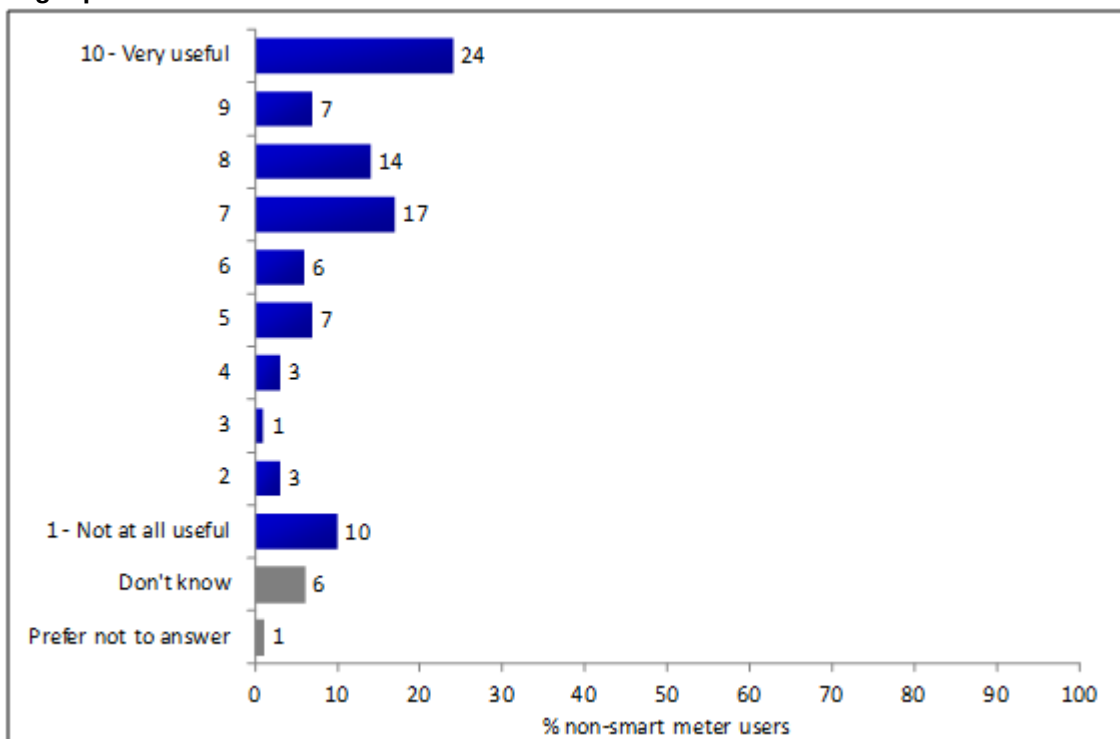
“I suppose that would be good. You could figure out your seasons, you know, like I’m pay as you go, so at least I could have a figure in my head as to how much I need per season.”

Female, Aged 35-49, Social Class C1, Prepayment customer

The ability to see how many units of energy being used live at any single point in time

Just under half (46 per cent) of non-smart meter users give this smart metering function a a usefulness rating of 8 to 10, with 10 being the highest rating possible. Around a quarter (24 per cent) rate it as 10 out of 10. However, a tenth (10 per cent) give it the lowest possible rating of 1.

Figure 32: Perceived usefulness of the ability to see how many units of energy being used live at any single point in time



Base: All non-smart meter users (70)

The depth interviews found that this function is felt to be valuable in identifying the causes of higher energy use and provides the ability to make adjustments in using appliances or central heating. It is seen as less valuable in situations where the levels of energy consumption are already known or where one appliance is responsible for most consumption (eg central heating). Actual costs of consumption are also seen as easier to understand than units of energy consumed.

The following quotes from the depth interviews show some examples of non smart meter users' perceptions of this smart metering function:

"Yes, that would be useful. If you had a number of different appliances for heating, electric heaters so you'd know exactly."

Male, Aged 50-64, Social Class C1, Prepayment customer

"Very useful, because I've got 3 children and, of course, they have all their gear on all the time when they're here – TV, computer, record player, and how long they spend in the shower and things like that. So I can demonstrate to them the cost of what they're doing, and also myself as well, see what I'm doing with waste of electricity or whatever."

Male, Aged 35-49, Social Class C2, Credit customer

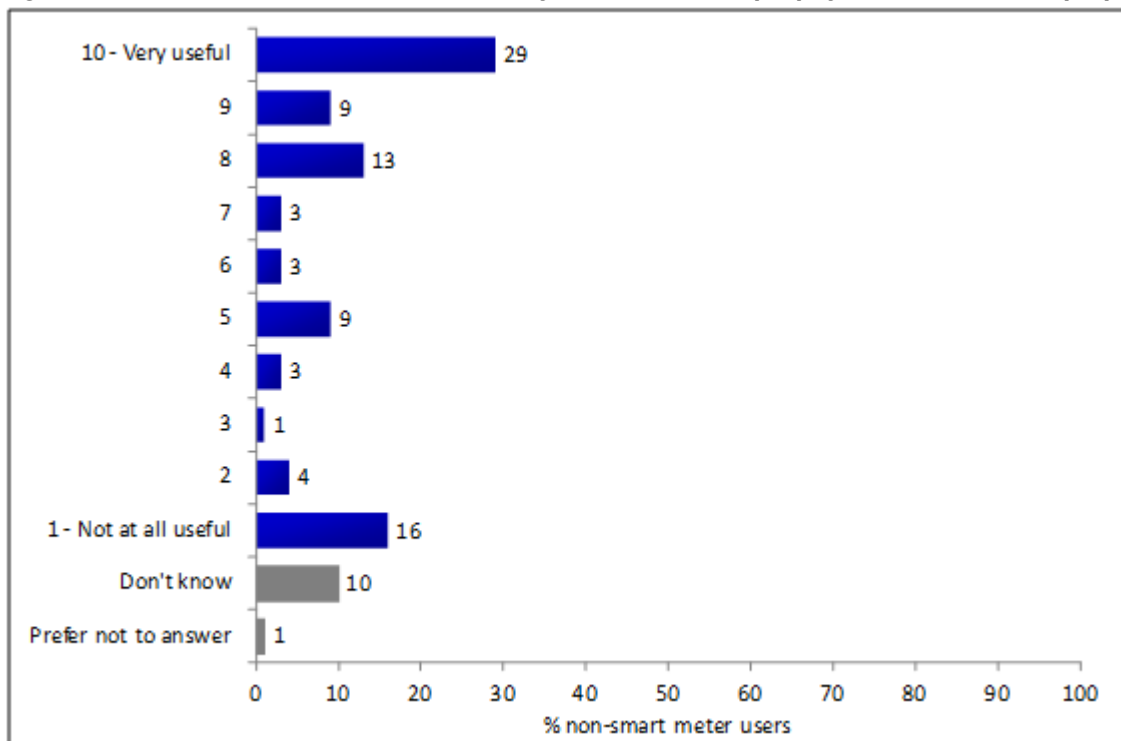
"I wouldn't say it's very important, I mean I don't need to see everything live, at any single point in time, I think that's a bit excessive. I think I'm within my financial limit so it's nothing that I find particularly strenuous."

Female, Aged 35-49, Social Class B, Prepayment customer

Usefulness of new ways for those with prepayment meters to top up their meter

This smart metering function is given a rating of 8 to 10 by half (50 per cent) of non-smart meter users. However, a sixth (16 per cent) rate it as 'not at all useful.'

Figure 33: Perceived usefulness of new ways for those with prepayment meters to top up their meter



Base: All non-smart meter users (70)

Participants in the depth interviews considered the chief benefit of new ways to top up their meter to be the ability to pay online and removing the need to visit a shop to find a PayPoint, which can be inconvenient or difficult in the case of those with disabilities.

Those less positive about the function include those who see no problems in visiting a shop to top up their prepayment cards and those who do not trust the technology to properly process online payments.

Below are some examples of non smart meter users’ perceptions of the usefulness of new ways to top up prepayment meters:

“That would be really handy because it’s a bit of a pain trying to find a PayPoint if one’s shut or the machine’s broken. It’s a bit of a nightmare to find another PayPoint. (BUT it also depends on robustness of the technology): Funnily enough British Gas do do that. I thought I’ll have a go trying to register our card so we could top up online and it was a nightmare. It didn’t recognise Windows 10 and, I thought I’m going to ruin my computer here so I stopped doing it.”

Female, Aged 50-64, Social Class A, Prepayment customer

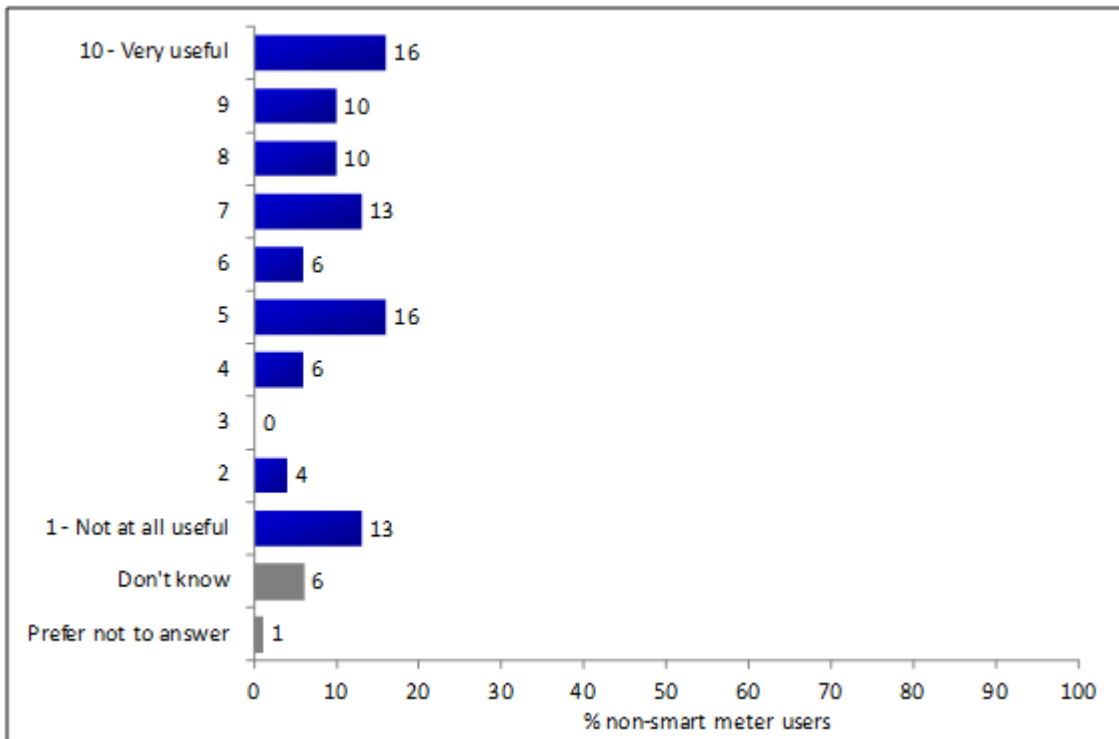
“Personally I may or may not use other methods because where I top up is literally a 2 or 3 minute walk to the local shop but that’s only because it’s convenient for me. If I was living somewhere else and I had to get in the car and drive to top up then obviously the alternatives would be much better.”

Female, Aged 35-49, Social Class B, Prepayment customer

The provision of new energy products and services

The distribution of ratings given for this function is relatively even across the range of 1 to 10 with no clear trend, though slightly skewed upwards. 16 per cent of non-smart meter users give it the highest rating of 10 and 13 per cent give the lowest rating of 1 out of 10.

Figure 34: Perceived usefulness of the provision of (the option of) new energy products and services



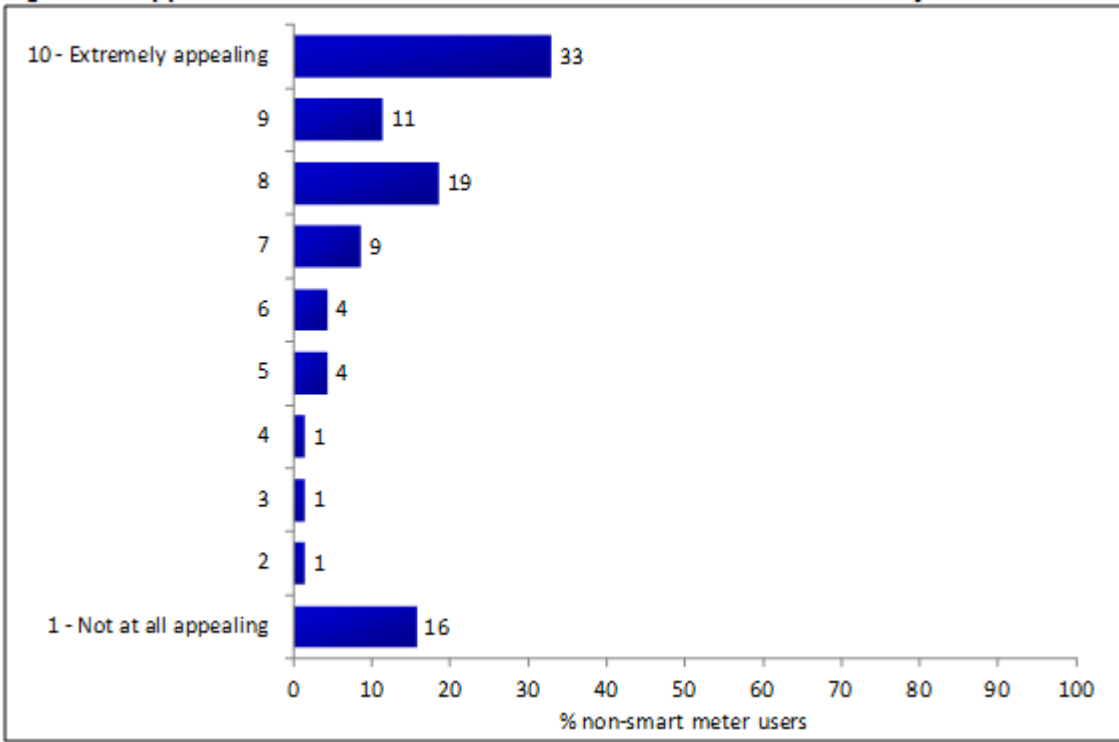
Base: All non-smart meter users (70)

4.4 Overall Appeal

For the majority, the idea of having a smart meter is appealing, as 63 per cent give a rating of 8 to 10 on a scale where 1 means 'not at all appealing' and 10 means 'extremely appealing.' A third (33 per cent) give a rating of 10 out of 10. However, a sixth (16 per cent) rate it as 'not at all appealing.'

The overall mean score on a scale of 1 to 10 is 7.2.

Figure 35: Appeal of smart meters to those without smart meters currently

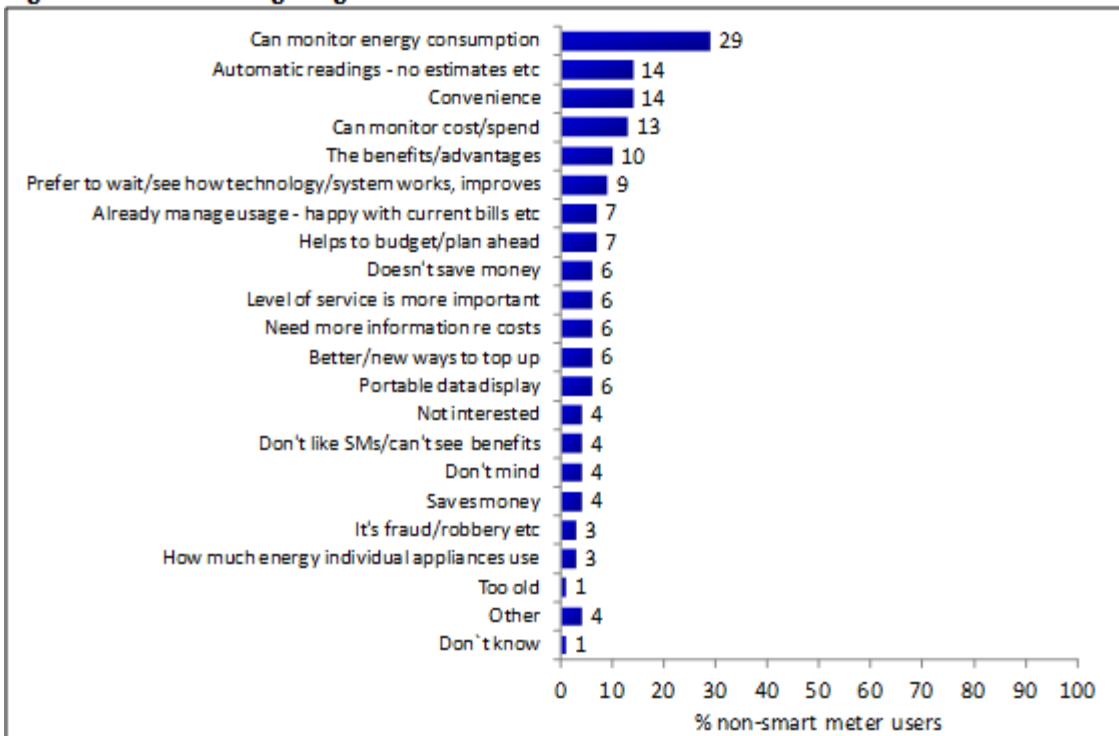


Base: All non-smart meter users (70)

The most common reasons behind the appeal scores given are:

- 29 per cent: being able to monitor energy consumption
- 14 per cent: automatic readings
- 14 percent: convenience
- 13 per cent: being able to monitor cost or spending.

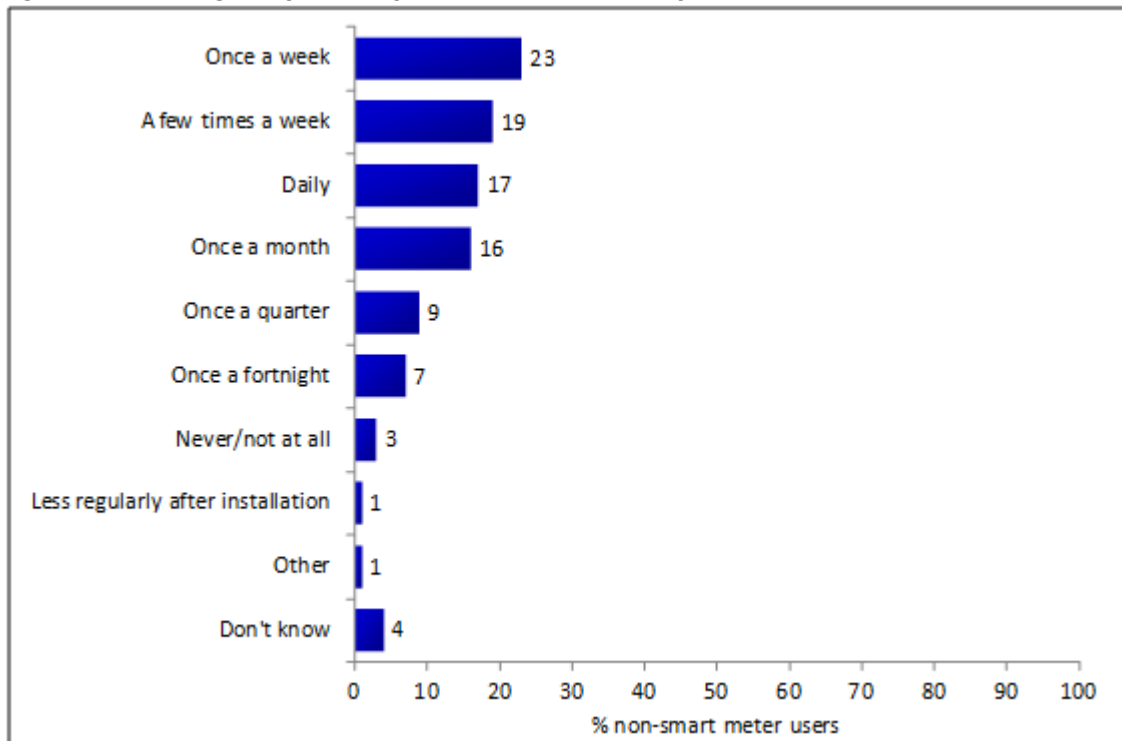
Figure 36 Reason for giving the selected appeal score



Base: All non-smart meter users (70)

Asked to imagine that they have a smart meter, just under a quarter (23 per cent) think that they would view their usage data once a week, just under a fifth (19 per cent) would do it a few times a week, and around a sixth say that they would do so daily (17 per cent) or once a month (16 per cent).

Figure 37 How regularly would you look at the data if you had a smart meter?



Base: All non-smart meter users (70)

The qualitative research explores reasons why users would look at smart meter data at different frequencies. Those with heavy use of energy, for example families, say they would look at information regularly. People with prepayment meters say they would be looking regularly to anticipate when they would need to top up the meter to avoid having their power cut off. Some say they would link reviewing the data to points in a time cycle that prompts review. This would be, for example when an energy bill comes in or when they make regular outgoings each month. Others feel the novelty of having a smart meter would initially encourage them to look at it regularly but this would fall over time. The following quotes illustrate different behaviours.

An example of high energy use household motivation to view data frequently:

“Once a week at weekends I’ve got two young boys, everything goes crazy with washing on the weekend to try and get it through and if it’s weather like we’ve got now, my tumble drier gets a hammering.”

Female, Aged 16-34, Social Class C1, Prepayment customer

An example of a prepayment customer motivation to check data frequently:

“Well, probably every day or every week; it’s just to keep an eye on (the prepayment balance), seeing how much is like left.”

Male, Aged 35-49, Social Class E, Prepayment customer

An example of cyclical viewing of data:

“I probably would look monthly because I think that’s what people tend to do. You’re looking at your monthly outgoings. You get paid and you pay your bills so I think that would be the ideal time.”

Female, Aged 35-49, Social Class B, Credit customer

An example of falling interest in looking at data:

“I suppose it starts off with every day and then it would be every week and then every month. It’s like a new toy, isn’t it? After a while, you get fed up of it. , it wouldn’t make me change my life at all.”

Male, Aged 65-74, Social Class C1, Credit customer

4.4 Awareness of Different Meter Types and Attitudes to Uptake

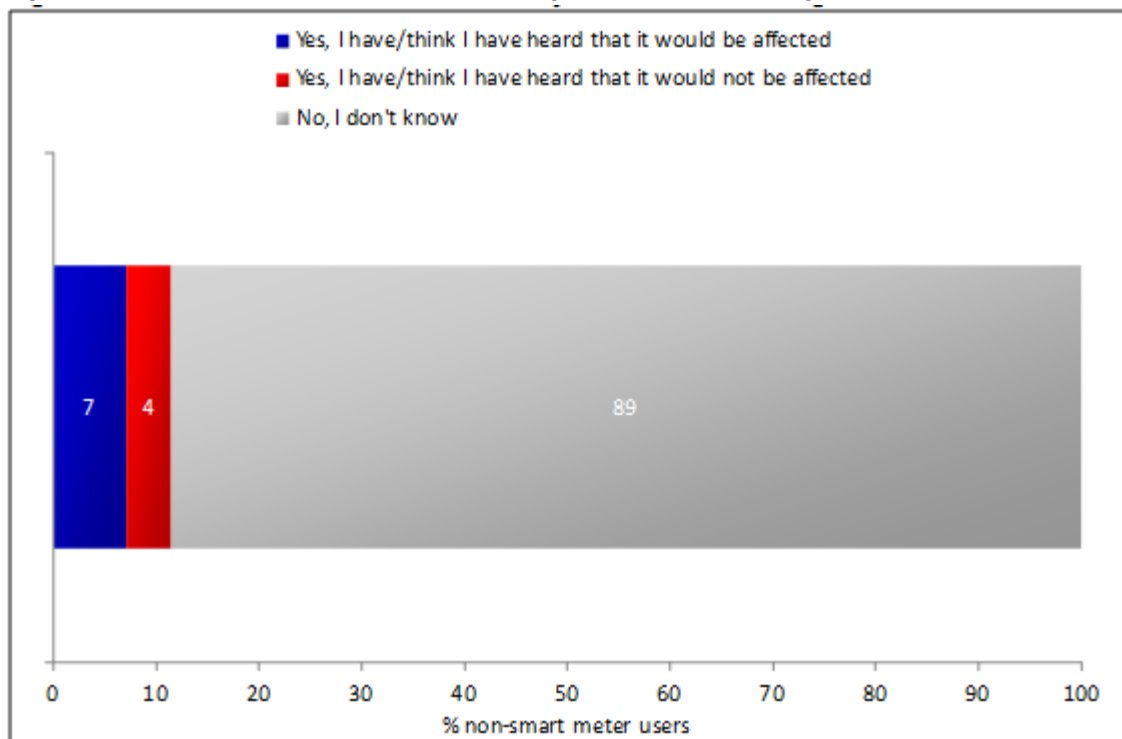
All non-smart meter users were asked a number of questions to explore their levels of awareness of different meter types and the limitations of them. The research also explored attitudes towards – and likely uptake of – smart meters. Again, this includes some questions where consumers were asked to imagine a scenario in which they had a smart meter installed.

Awareness of smart meter roll out and potential switching issues

None of the non-smart meter users who were aware of the rollout of smart meters before being contacted for this research are aware of any differences or issues between different types of smart meters that are being developed and installed.

A large majority (89 per cent) of non-smart meter users do not know if access to smart meter data or functionality would be affected if they were to change to another energy supplier. Another 7 per cent think that it would be affected and 4 per cent think that it would not.

Figure 38: Awareness of data or functionality issues on switching



Base: All non-smart meter users (70)

Table 15 shows the functions the 7 per cent think would be affected when changing to another supplier (multi-coded responses). No one response stands out, but this is drawn from a very small

number of responses (5). Frequencies rather than percentage figures are shown given the low base size.

Table 15: Way in which functionality would be affected

	Frequency n=
Households would lose the ability to have more accurate energy bills	1
Households would lose the ability to avoid meter readings	1
Households would not be able to see how many units of energy were being used live at any single point in time	1
Households would not be able to see how much their energy costs were over a period of time eg per day, per week per month, per year	1
Households would lose the information needed to help support a reduction in energy consumption/usage	1
Smart meters may not be compatible	1
Moved into house with smart meter, but decided not to use the supplier who installed the smart meter due to the energy prices they wanted to charge. Therefore they did not use the smart meter.	1
Don't know	2
Base (LOW)	5

Table 16 shows how the 5 participants of found out that functionality would be affected (multi-coded responses). Frequencies rather than percentage figures are shown given the low base size with media being the top response.

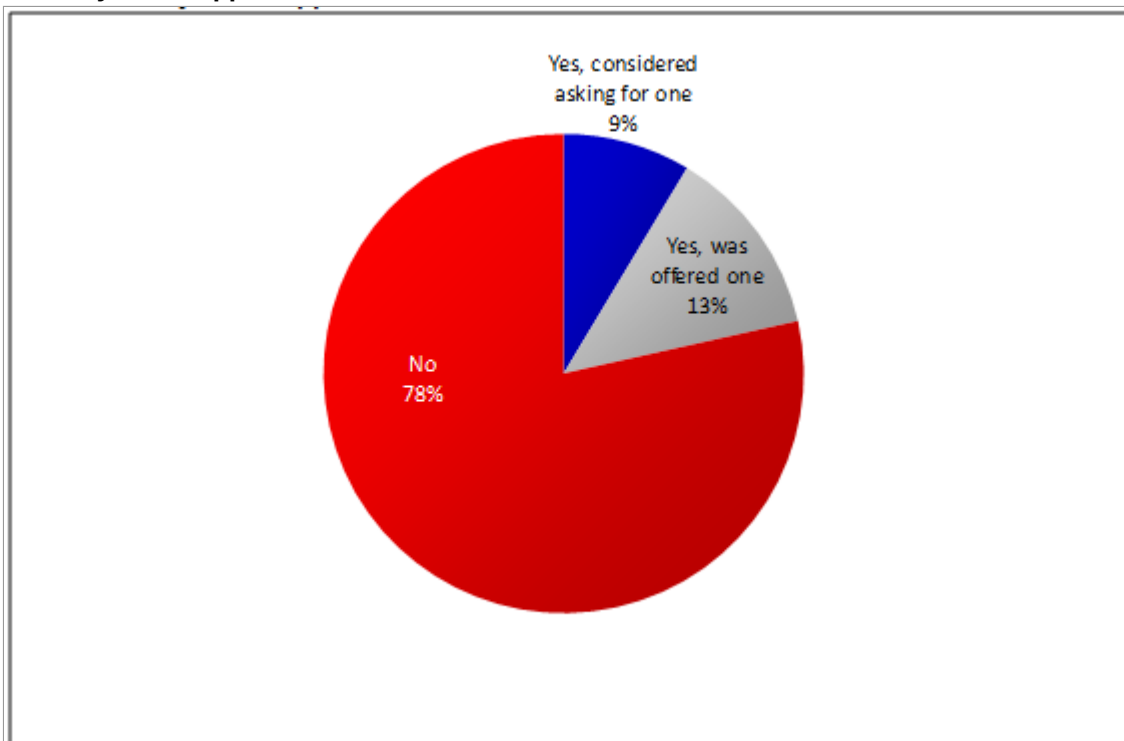
Table 16: Way in which participants found out that this would happen

	Frequency n=
In the media	3
Nothing was said/found out when I changed	1
Other	1
Base (LOW)	5

Consideration of smart meters among non users

Most non-smart meter users (78 per cent) have never considered asking for a meter or have not been offered one. 13 per cent were offered a smart meter and 9 per cent have considered asking for one.

Figure 39: Whether participants have ever considered asking for a smart meter, or been offered a smart meter by their supplier



Base: All non-smart meter users (70)

Table 17 shows the combined reasons for not having a smart meter installed by those who have considered asking for one or have been offered one (multi-coded responses). Responses are varied, but none includes concern about loss of functionality from current meters. Frequencies rather than percentage figures are shown given the low base size.

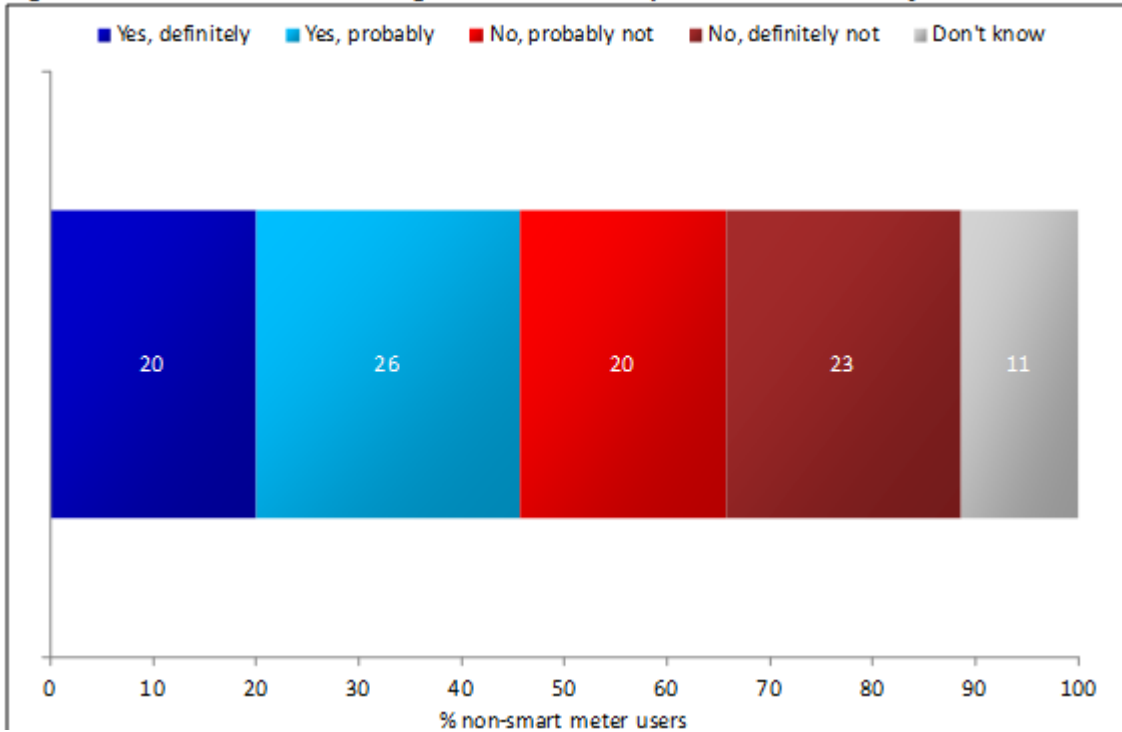
Table 17: Reason why participants did not have a smart meter installed

	Frequency n=
Waiting to have SM installed	3
Not been offered one	3
Didn't want one (at the time)	3
Haven't got round to it	2
Didn't know about them/companies who install them	2
Cost to install	1
Savings not worth installation	1
Other	1
Base (LOW)	15

Impact of losing smart meter functions if customers were to switch supplier

Non smart meter users were asked to imagine that they had decided to have a smart meter installed and were then, prior to installation, informed about the possibility of losing some of its functionality when switching energy suppliers. Around half (46 per cent) state that they would have continued with the installation, while 43 per cent state that they would not have. By contrast, all smart meter users would still have gone ahead.

Figure 40: Likelihood of switching if made aware of potential functionality issues

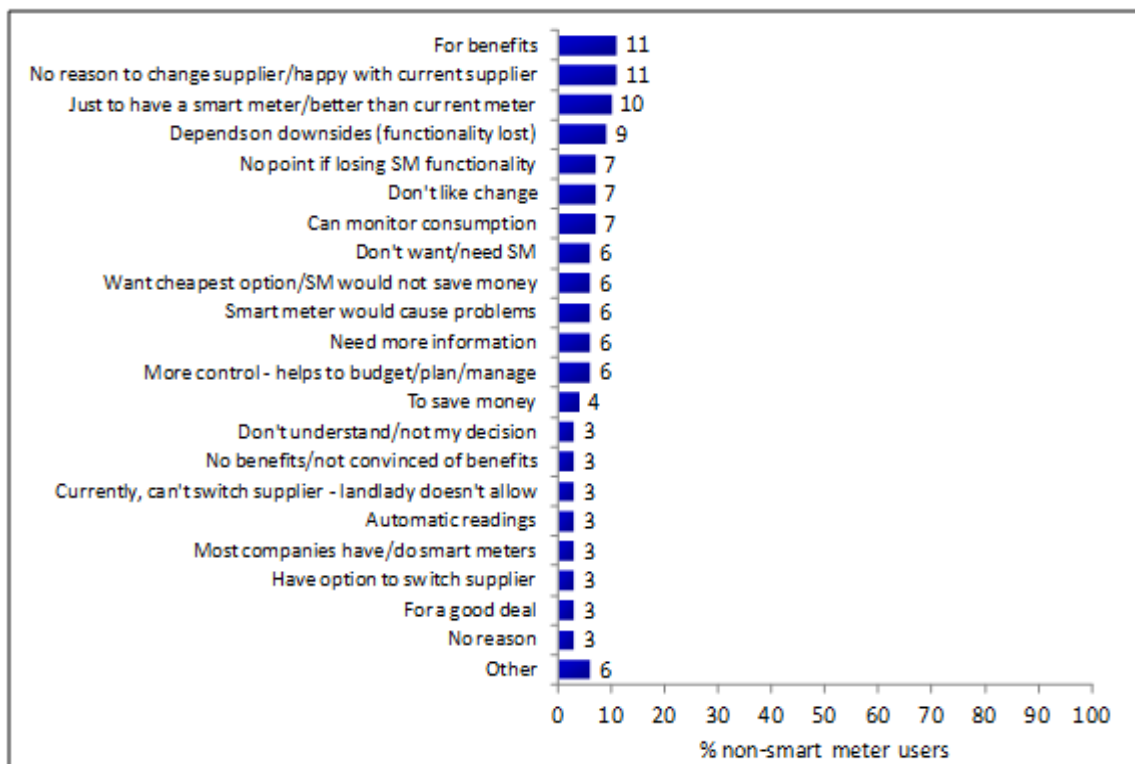


Base: All non-smart meter users (70)

The main reasons for stating they would have continued with the installation include:

- 11 percent: because of the benefits of having a smart meter
- 11 per cent: are happy with their current supplier and there is no reason for them to change
- 10 per cent: just to have a smart meter or because it would be better than the current meter
- 9 per cent: say that the decision to install would depend on the functionality that would be lost.

Figure 41: Reason why participants think that would have or would not have had the smart meter installed



Base: All non-smart meter users (70)

In the qualitative research, for several non users, the decision on whether or not to have a smart meter installed in these circumstances depends on the kinds of functions that they would lose. Another factor would be whether the financial gains in switching would outweigh the loss of smart meter information.

Some feel they would be happy to take the benefits while they were with the supplier who installed the meter, but would be willing to lose some if they were to switch to another.

“I’d obviously still have some benefits, even if I lost some. So I’d be more likely to stay with the company that I was with, to keep all the benefits.”

Female, Aged 35-49, Social Class C1, Prepayment customer

There is also evidence that disruption to the information obtained if changing to another supplier could prevent switching as the following two examples show:

“It depends what functionality I would lose... the top 3 that I wouldn’t want to lose is a way to pay without going to a pre-payment shop and then the no need for meter readings and the more accurate bills are alongside each other.”

Female, Aged 16-34, Social Class C1, Prepayment customer

“I don’t think I’d have it. I think it would be a case that if I had it, I’d want it to be able to everything with any supplier.”

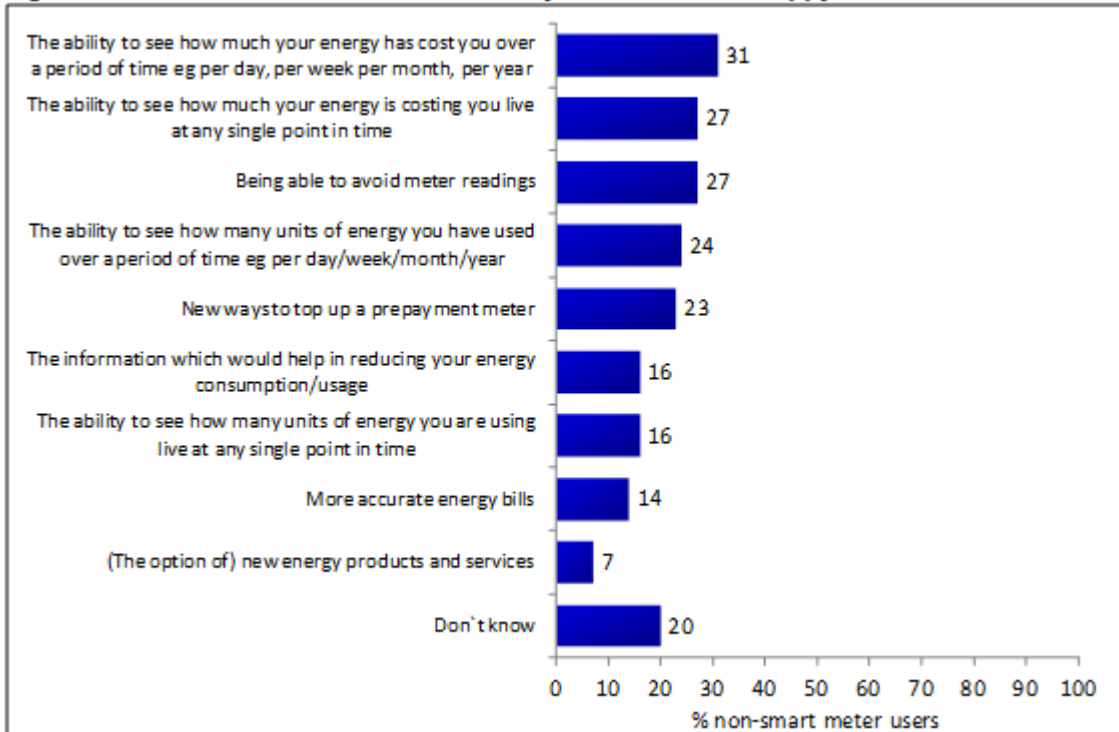
Female, Aged 35-49, Social Class B, Credit customer

Smart metering functions non users would be least happy to lose

The functions non users would least like to lose are:

- 31 per cent: the ability to see how much energy has cost you over a period of time eg per day, per week per month, per year
- 27 per cent: the ability to see how much energy is costing you live at any single point in time
- 27 per cent: being able to avoid meter readings
- 24 per cent: the ability to see how many units of energy have been used over a period of time
- 23 per cent: new ways to top up prepayment meters .

Figure 42: Functions of the smart meter participants would be least happy to lose



Base: All non-smart meter users (70)

In the depth interviews, non-smart meter users were asked if their decision to accept or not accept a smart meter would be affected if they were told that loss of data or functionality would eventually be fixed if they were to switch to another supplier. A range of views were expressed. Some feel that their decision to have the smart meter installed would not be affected in any way. Others indicate that their decision would depend on the timescale for fixing the problems and confidence that the new supplier will make the corrections:

"...when they install it, it doesn't really work properly and then you get into a cycle of calling them, trying to fix things and then nothing happens...so yeah, if an energy company said 'ok we're going to fix this' I would take this with a pinch of salt."

Female, Aged 35-49, Social Class B, Prepayment customer

"They'd probably just be saying that to get you as a customer and then not bother."

Female, Aged 50-64, Social Class A, Prepayment customer

One who said they would still go ahead understood that teething problems can occur with new technology and would welcome the benefits in the interim:

"I think I would appreciate that it's new technology and that it's going to take time to get it right and we should still stick with it, and any information from a smart meter is going to be more than I've got now so yeah I'd be happy with that."

Female, Aged 50-64, Social Class B, Credit customer

Others would not go ahead or would delay until the problems were sorted out:

After being asked about the effect of possibly losing functionality and data if they changed suppliers and about the effects of the supplier fixing the problem in the future, non-smart meter users were then asked in the depth interviews how these scenarios would make them feel about their energy supplier. Most think negatively, with reasons including:

- feeling feeling pressured not to switch to maintain the benefits of smart meters
- surprise that meters are not designed to allow full functionality when changing supplier.

The following comments illustrate these points:

"I think it sounds a bit like blackmail. It's a bit like saying that if you want to benefit fully from something you need to stay with us. It's a bit like locking you in a contract ok nothing bad but I know they kind of persuade consumers to stay."

Female, Aged 35-49, Social Class B, Prepayment customer

"I'd be quite angry actually really because why can't they just use the same similar set-up really? Why can't they transfer information to that sort of thing that they've created? These machines, I can't see why you'd have to lose some of the information on something when they've supplied it? It doesn't make sense. I'd understand if you could send the machine back if you changed supplier, get a machine for that supplier then that would make sense because then you're not losing out on anything."

Female, Aged 35-49, Social Class E, Prepayment customer

Others indicate that their reaction would depend on the balance of negatives and positives involved in any decision to switch. This centres on cost issues, essentially if the cost saving is attractive enough, this will outweigh any loss of the benefits obtained from smart meters:

"It would be something (ie an issue) if I got used to using those certain functionalities that I would consider; I'd have to outweigh the cost as to whether it was worth."

Female, Aged 16-34, Social Class C1, Prepayment customer

Would non users wait for a SMETS 2 smart meter?

Non-smart meter users were asked in the qualitative research whether they would prefer to wait until later in 2016 to have smart meters installed by which time there would be no issues in losing data or functions if they were to move to a new supplier. Excluding those who did not want to comment because they found it hard to visualise using a smart meter, all others would prefer to wait. Some, however, indicate there would be a time limit on holding off as they would like the benefits of a smart meter. Some others say they would wait because they do not see an immediate need to having a smart meter installed. The most common response, however, is that they would prefer to wait because they would be surer that the technology works. Several made an analogy with mobile phones:

"It's like in comparison to a smart phone. You get the latest smart phone out, but there's always endless problems with it. Then after a year they've ironed it all out, that's why I would wait."

Male, Aged 50-64, Social Class E, Credit customer

Impressions of energy supplier

In the depth interviews, non users were asked how the potential functionality loss when switching would affect perceptions of their energy supplier. The bulk of negative comments centre on the impact of the loss of smart metering benefits rather than on the perceptions of their supplier. Some non users explicitly state that they would be dissatisfied if they were not told about the loss of functionality in advance of any change of supplier. The reasons for this include:

- the supplier hiding information
- the supplier attempting to keep customers from switching
- concern that loss of functionality has not been taken into account in designing the smart metering installation process g.

“I’d be quite angry actually really because why can’t they just use the same similar set-up really? It doesn’t make sense. I’d understand if you could send the machine back if you changed supplier, get a machine for that supplier then that would make sense because then you’re not losing out on anything.”

Female, Aged 35-49, Social Class E, Prepayment customer

For others it is of little impact:

“It wouldn’t make any difference to me. To me it would be whoever provided the cheapest energy basically and the most efficiently.”

Male, Aged 35-49, Social Class C2, Credit customer

5. CONCLUSIONS

Both smart meter users and non-users are positive about smart meters: amongst the former, overall satisfaction is very high at 8.7 out of 10, whilst for non users the appeal of smart meters is high at 7.2 out of 10.

However, the research has identified widespread lack of awareness, and lack of dissemination on the part of suppliers, of information regarding the potential disadvantages of early smart meters. Suppliers, therefore, do not appear to be adhering to the licence condition requirements that they tell consumers about these potential issues. At the very least any communication that is being made is not getting through to consumers

A large majority (91 per cent) of smart meter users were not informed by their energy supplier about any limitations or disadvantages prior to the installation of their smart meter; only 3 per cent were. Similarly, a large majority of smart meter users (83 per cent) were not told that the smart meter might need to be changed or updated again in the future. Only 6 per cent were.

Asked specifically about potential issues when switching supplier, again the majority (57 per cent) do not know whether their access to smart meter data or functionality would be affected were they to do so, whilst 30 per cent do not believe that it would be.

Amongst those who do not currently have a smart meter but who were aware of the rollout of smart meters before being contacted for this research, none are aware of any differences or issues between different types of smart meters that are being developed and installed. The large majority of these consumers (89 per cent) do not know if access to smart meter data or functionality would be affected if they were to change to another energy supplier.

All smart meter users would still have gone ahead with the installation, had they known in advance about the potential loss of information and services when switching. By contrast, over 40 percent of non users would not have. Further exploration within the depth interviews suggests that most smart meter users who only became aware of the issue after installation would still have gone ahead with the installation if they had been aware. The benefits these users gain from their smart meter outweighed the potential disadvantages. However, given the choice between that and waiting for second generation of smart meters, some - albeit a minority in this research - they would have chosen the latter. These findings are also reflected in the scenario testing amongst non-smart meter users when asked hypothetically what they would have done.

Reasons why participants would still have gone ahead focused upon the convenience of online pre-payment options (for those with pre-payment meters) and the offer of a financial incentive to install a smart meter; seeing what they were using – and the cost of that – was also valued by most.

However, whilst most would still have gone ahead, the depth interviews reveal concern and dissatisfaction that they were not alerted to these issues prior to installation and that users would be particularly unhappy were they to lose new ways of topping up the meter, the ability to see how much their energy has cost them over a period of time and the number of units of energy used over a period of time.

In conclusion, therefore, whilst the majority of users are satisfied with their smart meters and, at least currently, feel that their benefits outweigh any potential issues, there is clear evidence that some would not, or 'might not', have gone ahead with the installation had they been aware of any potential data or functionality issues. There is a clear need for suppliers to proactively alert consumers to the

potential issues they may face prior to installation to ensure that they can make an informed choice and be free to switch without losing the benefits they are currently gaining, and value, from their meters should they wish to do so.

APPENDIX A

Questionnaire

Interviewer no: Interviewer name:

Date: Time interview started:

DP: ASK INTERVIEWER TO INSERT POSTCODE FROM SAMPLE ON FIRST SCREEN

Recruitment Screening

Good morning/afternoon/evening. My name is from Accent and I am carrying out research for Citizens Advice into electricity and gas meters. Please can I speak to the person who pays the household gas and /or electricity bills?

INTERVIEWER: ONCE YOU SPEAK TO THE BILL PAYER, CONTINUE WITH

Good morning/afternoon/evening. My name is from Accent and I am carrying out research for Citizens Advice into electricity and gas meters. The Citizens Advice service provides the advice that people need to help them with the problems they face and aims to improve the policies and practices that affect people's lives. This research will help inform policies related to the roll out of smart meters in the UK; please can I ask you a few short questions to check if you are in scope for the research. Any answers you give will be treated in confidence in accordance with the Code of Conduct of the Market Research Society. Your call may be recorded for quality control purposes. Can I continue?

Q1. Thank you. Can I begin by asking whether you have a smart electricity or gas meter in your property? A smart meter is one which sends meter readings automatically to your energy company, so that you no longer need to have, or provide, meter readings. It may also be linked to an in-home display device or a website which allows you to see how much energy you are using and what it costs in pounds and pence. Do you have a smart meter like this installed in your home?

1. Yes
2. No
3. Don't know **THANK AND CLOSE**
4. Prefer not to answer **PERSUADE AND REASSURE ELSE THANK AND CLOSE**

Further Screening for Those with a Smart Meter

Q2. **ASK IF Q1 = 1, ELSE GO TO Q48.** Some suppliers have given their customers clip-on energy displays to show their usage - is this what you have, or is it actually your meter which is 'smart', that is your meter has been changed so that it sends meter readings automatically to your energy company as well as providing you with information?

1. Yes, have clip on device **GO TO Q48**
2. No, have smart meter
3. Don't know **THANK AND CLOSE**
4. Prefer not to answer **PERSUADE AND REASSURE ELSE THANK AND CLOSE**

Q3. ASK IF Q2 = 2, ELSE GO TO Q48 Please can you confirm that you were the person who was present when the smart meter was installed? **INTERVIEWER: if they were not present ask if they were involved in organising the smart meter installation and communications with the supplier and record accordingly**

1. Yes, present at installation
2. Not present at installation but involved in organisation & communications
3. No **ASK IF YOU CAN SPEAK TO THE PERSON WHO WAS PRESENT OR INVOLVED – SEEK APPROPRIATE TIME IF NOT AVAILABLE, ELSE THANK AND CLOSE**

Q4. Please can you confirm that you live in [DP: INSERT REGION FROM SAMPLE]? This is only to check we have the right spread of participants across the UK.

1. South East
2. London
3. East
4. South West
5. West Midlands
6. East Midlands
7. Wales
8. North West
9. Yorkshire and Humberside
10. North East
11. Scotland

Routing to Online or CATI Questionnaire for Those with a Smart Meter

Q5. Thank you, you are in scope for the research. The survey will take about 10 minutes. You do not have to answer questions you do not wish to and you can terminate the interview at any point. In exchange for completing the interview, we will send you a £10 Love2Shop voucher which can be redeemed at a wide range of High Street stores to thank you for your time. You can do this with me quickly over the phone now. Alternatively, we can send you a link so you can do this online if you can confirm your email address to me. Which would you prefer? **SINGLE CODE**

1. Continue by phone now
2. Continue by phone later **MAKE APPOINTMENT, THANK AND CLOSE**
3. Do the survey online
4. Do not wish to continue **THANK AND CLOSE**

Q6. ASK IF Q5 = 3 “DO THE SURVEY ONLINE” ELSE GO TO Q8 Please can you give me your email address so that we can send you a link to the online survey

1. **Please enter email address here:**.....
2. **Please confirm email address here:**

ONLY ALLOW INTERVIEW TO CONTINUE IF THE EMAIL ADDRESS IS THE SAME IN BOTH FIELDS.

3. Refused **PERSUADE AND REASSURE ELSE THANK AND CLOSE**

Q7. What name shall I send the email to? Just a first name is fine; this is only to address you at the start of the email. **INTERVIEWER IF ONLY FIRST NAME CAPTURED, LEAVE TITLE FIELD BLANK**

1. **Please enter title here** **DROP DOWN BOX WITH Mr. Mrs. Ms. Dr.** but a blank if only collecting first name
2. **Please enter first name here:**
3. **Please enter surname here:**

4. Refused: **START EMAIL WITH “Dear Sir or Madam”**

INTERVIEWER CLARIFY THAT THE SENDER WILL SHOW AS Citizens Advice Smart

Meters

EMAIL HAS BEEN SENT. IF THE PARTICIPANT DOES NOT RECEIVE IT ASK THEM TO CLICK ON SEND/RECEIVE. IF THEY STILL DO NOT RECEIVE IT CHECK THE EMAIL ADDRESS ON THE PREVIOUS SCREEN. PLEASE NOTE THAT CERTAIN VIRUS SOFTWARES CAN BLOCK DELIVERY FOR UP TO 2 MINUTES UNLESS PARTICIPANT EXITS.

Q7a Thank you for agreeing to take part in this research. Please can you complete the questionnaire by **INSERT DATE = interview date + 7 days, except anyone recruited from 4 February onwards when cut off date is 10 February**

And finally, just to say again that this research is being conducted under the terms of the MRS code of conduct and is completely confidential. If you would like to confirm Accent's credentials, please call the Market Research Society free on 0500 396999.

Initial email invitation text

Email heading = Citizens Advice Survey on Smart Meters

Dear **ENTER TITLE AND SURNAME, OR FIRST NAME IF NO TITLE OR SURNAME GIVEN, FROM Q7** (ie show Q7.1 title + Q7.3 surname if Q7.1 and 7.3 are filled in. If Q7.2 is filled in show only Q7.2 first name only, no title, no surname), no comma at end of name in email

Thank you once again for agreeing to take part in this research which we at Accent are conducting on behalf of Citizen's Advice.

We will be asking you some questions about your experiences of smart meters.

When you have completed the survey we will send you a £10 Love2Shop voucher to thank you for your time. Please can you complete the questionnaire by **INSERT DATE = interview date + 7 days, except anyone recruited from 4 February onwards when cut off date is 10 February 2016.**

Any answer you give will be treated in complete confidence in accordance with the Code of Conduct of the Market Research Society. You do not have to answer questions you do not wish to and you can terminate the interview at any point.

Please click on the secure link below to start the survey.

Yours sincerely

Seán Brennan
Project Manager

Reminder email text: TO BE SENT OUT 4 DAYS AFTER ORIGINAL IF NOT COMPLETED OR IN SUITABLE PERIODIC BATCHES IF THIS IS TOO FIDDLY

Dear **ENTER TITLE AND SURNAME, OR FIRST NAME IF NO TITLE OR SURNAME GIVEN, FROM Q7** ie show Q7.1 title + Q7.3 surname if Q7.1 and 7.3 are filled in. If Q7.2 is filled in show only Q7.2 first name only, no title , no surname), no comma at end of name in email

You may recall that you agreed to take part in research about your experience of smart meters which we at Accent are conducting on behalf of Citizen's Advice.

We will send you a £10 Love2Shop voucher to thank you for your time once you have completed it.

We are emailing you again because you have not completed survey yet and the deadline for doing so is **INSERT DATE = interview date + 7 days, except anyone recruited from 4 February onwards when cut off date is 10 February 2016.**

We would be very grateful if you could find the time to complete it before then. Any answer you give will be treated in confidence in accordance with the Code of Conduct of the Market Research Society. You do not have to answer questions you do not wish to and you can terminate the interview at any point.

Please click on the secure link below to access the survey.

Yours sincerely

Seán Brennan
Project Manager

Main Questionnaire Introduction for Online Participants with a Smart Meter Only

Dear **ENTER TITLE AND SURNAME, OR FIRST NAME IF NO TITLE OR SURNAME GIVEN, FROM Q7**

This survey should take 10 minutes to complete. However, should you need to stop part way through the survey you can complete the rest later; you will automatically return to the last question you answered when you go back into the survey.

Your answers are automatically saved each time you click on the forward button at the bottom of each web page. You can look at your previous answers by pressing the back button.

If you leave the survey idle for more than 30 minutes you will be logged out automatically, but all of your completed answers will be saved.

If you have any questions please contact Seán Brennan at Accent. His email address is sean.brennan@accent-mr.com. He will be glad to help you.

Main Questionnaire for Online and CATI Participants with a Smart Meter

Q8. The first question is about the kind of smart meter you have. **SHOW ALL** Do you have a smart gas meter, a smart electricity meter or both? **MULTICODE PLEASE CLICK ON ANY ANSWERS THAT APPLY TO YOU**

1. Smart gas meter
2. Smart electricity meter
3. Don't know **(EXCLUSIVE) THANK AND CLOSE**
4. Prefer not to answer **(EXCLUSIVE) THANK AND CLOSE**

Q9. DUMMY QUESTION TO BE USED WHEN Q8 = 1 "SMART GAS METER AND 2 "SMART ELECTRICITY METER" ELSE GO TO Q11. RANDOMLY SELECT EITHER GAS OR ELECTRICITY SMART METER

1. Smart gas meter
2. Smart electricity meter

Q10. As you have both a smart gas and smart electricity meter the remaining question will be about your SHOW IF Q9 = 1 "SMART GAS METER" smart gas meter SHOW IF Q9 = 2 "SMART ELECTRICITY METER" smart electricity meter.

PLEASE CLICK ON THE FORWARD BUTTON TO GO TO THE NEXT QUESTION (DP GO TO Q10)

Q11. When was your smart meter installed? PLEASE USE THE DROP DOWN BOXES BELOW TO RECORD THE MONTH AND YEAR WHEN THE SMART METER WAS INSTALLED. IF UNSURE OF EITHER, PLEASE CLICK ON THE DON'T KNOW MONTH OR YEAR OPTION

1. Drop down box for month DP allow don't know for month
2. Drop down box for year **(2010 TO 2016 ONLY)**
3. Don't know month or year **(EXCLUSIVE)**
4. Prefer not to answer **(EXCLUSIVE)**

Q12. Which energy supplier arranged for the installation of your smart meter? SINGLE CODE PLEASE CLICK ON ONE ANSWER IN THE LIST BELOW

1. British Gas
2. EDF Energy
3. Eon
4. First Utility
5. Manweb
6. Npower
7. Ovo
8. SSE
9. Scottish Hydro
10. Southern Electric
11. Spark
12. SWALEC
13. ScottishPower
14. Utilita
15. Other **(please click on the box below and type in your answer)**

16. Don't know
17. Prefer not to answer

Q13. Does INSERT RESPONSE TO Q11 BUT IF Q12 = 16 "DON'T KNOW" OR 17 "PREFER NOT TO ANSWER" SHOW this energy supplier SHOW ALL still provide you with your IF Q9 = 1 "SMART GAS METER" SHOW gas? IF Q9 = 2 "SMART ELECTRICITY METER" SHOW electricity?

1. Yes
2. No
3. Don't know
4. Prefer not to answer

Q14. When your smart meter was installed, were you a pre-payment customer or a credit customer for **SHOW IF Q9 = 1 "SMART GAS METER** for gas? **SHOW IF Q9 = 2 "SMART ELECTRICITY METER"** for electricity? **SINGLE CODE PLEASE CLICK ON ONE ANSWER BELOW**

1. Pre-payment customer (ie 'Pay As You Go' by key or card)
2. Credit customer (eg cash, cheque, direct debit)
3. Don't know
4. Prefer not to answer

Q15. Were you offered an in home display when your meter was installed, and if yes, did you accept it? An in home display is a portable device which allows you to see how much energy you are using (past and present) and how much it costs in pounds and pence? **IF OFFERED BUT DID NOT ACCEPT, PLEASE SELECT MOST APPROPRIATE REASON WHY**

1. Yes, offered and accepted
2. Yes, offered but did not accept because advised against it by the installer
3. Yes, offered but did not accept because did not think would use it
4. Yes, offered but did not accept for another/unspecified reason
5. No
6. Can't remember

Q16. Are you viewing the smart meter data in any way - for example through the In Home Display, online or through a mobile app? **MULTI CODE PLEASE CLICK ON ANY ANSWERS THAT APPLY TO YOU**

1. Yes, through an In Home Display/IHD
2. Yes, through a website
3. Yes, through an app
4. No, none of these (EXCLUSIVE)
5. Prefer not to answer (EXCLUSIVE)

Q17. **ASK IF Q16=1 OR 2 OR 3, ELSE GO TO Q23** How regularly are you viewing the data?

1. Daily
2. A few times a week
3. Once a week
4. Once a fortnight
5. Once a month
6. Once a quarter
7. Other **PLEASE WRITE IN**
8. Prefer not to answer

Q18. **ASK IF MORE THAN ONE RESPONSE SELECTED AT Q16** Through which of the following do you view the data most often? **READ OUT**

1. **SHOW IF Q16 = 1:** through an In Home Display/IHD
2. **SHOW IF Q16 = 2:** through a website
3. **SHOW IF Q16 = 3:** through an app

Q19. How easy do you find it to view this data [IF Q18 = 1 SHOW THROUGH AN IN HOME DISPLAY/IHD; IF Q18 = 2 SHOW THROUGH A WEBSITE; IF Q18 = 3 SHOW THROUGH AN APP]? Please use a scale of 1 to 10 where 1 is not at all easy and 10 is extremely easy.

- 1 - Not at all easy
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10 - Extremely easy
- Don't know
- Prefer not to answer

Q20. ASK IF Q16 = 4 "NO, NONE OF THESE" ELSE GO TO Q23 Why not? MULTI CODE

- 1. Wasn't given an In Home Display
- 2. In Home Display isn't working
- 3. Don't know how to use the in home display
- 4. Wasn't given access to online data
- 5. Can't access the online data
- 6. Wasn't given a mobile app
- 7. Can't use the mobile app/get it to work
- 8. Not interested in viewing the data
- 9. Don't know how to view the data
- 10. Other **PLEASE WRITE IN**
- 11. Don't know (**EXCLUSIVE**)
- 12. Prefer not to answer (**EXCLUSIVE**)

Q21. ASK IF Q16 = 1, 2 or 3 "IN HOME DISPLAY OR WEBSITE OR APP" ELSE GO TO Q23 When the installer came to your home did he or she show you how to use your in home display or how to view the data online or via the app?

- 1. Yes
- 2. No
- 3. Don't know
- 4. Prefer not to answer

Q22. ASK IF Q21 = 1 "YES" ELSE GO TO Q23 How satisfied or dissatisfied were you with the explanation the installer gave you? Please answer on a scale of 1 to 10 where 1 means very dissatisfied and 10 means very satisfied. **PLEASE CLICK ON ONE OF THE BUTTONS BELOW**

- 1 - Very dissatisfied
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10 - Very satisfied
- Don't know
- Prefer not to answer

Q23. Which of the following statements best describes how you came to have the smart meter installed by **INSERT RESPONSE TO Q12 BUT IF Q12 = 11 "DON'T KNOW" OR 12 "PREFER NOT TO ANSWER"** **SHOW** by your energy supplier? **SINGLE CODE. ROTATE 1 TO 4, BUT NOT 5 AND 6. INTERVIEWER PLEASE READ OUT ALL EXCEPT "DON'T KNOW" AND "PREFER NOT TO ANSWER" PLEASE CLICK ON ONE ANSWER BELOW**

1. I asked my energy supplier for a smart meter
2. My energy supplier asked me if I wanted a smart meter
3. My energy supplier told me they were going to install a smart meter before the installer came to my home to fit it. They did not ask me if I wanted a smart meter
4. The first I knew I was getting a smart meter was when the installer came to my home. I was not told in advance.
5. Don't know
6. Prefer not to answer

Q24. Why did you **SHOW IF Q23 = 1 "I ASKED ...ETC"** want a smart meter installed? **SHOW IF Q23 = 2 "MY ENERGY SUPPLIER ASKED ME ...ETC"** agree to have a smart meter installed? **SHOW IF Q23 = 3 "MY ENERGY SUPPLIER TOLD ME...ETC" OR 4 "THE FIRST I KNEW...ETC" OR 5 "DON'T KNOW" OR 6 "PREFER NOT TO ANSWER"** allow **INSERT RESPONSE TO Q12 BUT IF Q12 = 11 "DON'T KNOW" OR 12 "PREFER NOT TO ANSWER"** **SHOW** your energy supplier to install a smart meter? **ROTATE 1 – 10; MULTICODE PLEASE CLICK ON ANY ANSWERS THAT APPLY TO YOU IN THE LIST BELOW**

1. I didn't know I had a choice over whether to have the smart meter installed
2. To obtain more accurate energy bills / no estimated bills
3. To avoid having to have/provide meter readings
4. To see how many units of energy I am using live at any single point in time
5. To see how many units of energy I have used over a period of time eg per day, per week per month, per year
6. To see how much my energy is costing me live at any single point in time
7. To see how much my energy has cost me over a period of time eg per day, per week per month, per year
8. To get information to help me to reduce my energy consumption/usage
9. It offered new ways for me to top up my meter
10. It would provide me with (the option of) new energy products and services
11. Other reasons **Please type your response in the box below**
12. None of these **(EXCLUSIVE)**
13. Don't know **(EXCLUSIVE)**
14. Prefer not to answer **(EXCLUSIVE)**

Q25. **ASK IF Q23 NOT EQ 4 "THE FIRST I KNEW...ETC" ELSE GO TO Q27.** I would like you to think about your communications with **INSERT RESPONSE TO Q12 BUT IF Q12 = 11 "DON'T KNOW" OR 12 "PREFER NOT TO ANSWER"** **SHOW** your energy supplier **SHOW ALL** before the smart meter was installed and with the person who came to install the smart meter. First of all please think back to the time **before INSERT RESPONSE TO 0 BUT IF Q12 = 11 "DON'T KNOW" OR 12 "PREFER NOT TO ANSWER"** **SHOW** your energy supplier **SHOW ALL** installed the smart meter. Did they say there would be benefits in having a smart meter? If so, what did they say? **ROTATE 1 - 9; MULTICODE PLEASE CLICK ON ANY ANSWERS THAT APPLY TO YOU IN THE LIST BELOW**

1. They did not mention any benefits of having a smart meter **(EXCLUSIVE)**
2. I would receive more accurate energy bills / no estimated bills
3. It would avoid the need for meter readings
4. I could see how many units of energy I am using live at any single point in time
5. I could see how many units of energy I have used over a period of time eg per day, per week per month, per year

6. I could see how much my energy is costing me live at any single point in time
7. I could see how much my energy has cost me over a period of time eg per day, per week per month, per year
8. It would provide information to help me reduce my energy consumption/usage
9. It offered new ways for me to top up my meter
10. It would provide me with (the option of) new energy products and services
11. None of these **(EXCLUSIVE)**
12. Don't know **(EXCLUSIVE)**
13. Prefer not to answer **(EXCLUSIVE)**

Q26. Still thinking of the time **before** the Smart Meter was installed. Did **INSERT RESPONSE TO Q12 BUT IF Q12 = 11 "DON'T KNOW" OR 12 "PREFER NOT TO ANSWER" SHOW** your energy supplier **SHOW ALL** say there would be any limitations or disadvantages of having a smart meter installed? If so what did they say?

1. Yes **Please type what they said in the box below**.....
2. No
3. Don't know **(EXCLUSIVE)**
4. Prefer not to answer **(EXCLUSIVE)**

Q27. Which one of the following do you now see as the greatest benefit of your smart meter? **ROTATE 1-9. PLEASE SELECT ONE RESPONSE FROM THE LIST BELOW**

1. more accurate energy bills / no estimated bills
2. no meter readings
3. being able to see how many units of energy I use live at any single point in time
4. being able to see how many units of energy I have used over a period of time eg per day, per week per month, per year
5. being able to see how much my energy is costing me live at any single point in time
6. being able to see how much my energy is costing me over a period of time eg per day, per week per month, per year
7. helping me to reduce my energy consumption/usage
8. new ways for me to top up my meter
9. (the option of) new energy products and services
10. None of these **(EXCLUSIVE)**
11. Don't know **(EXCLUSIVE)**
12. Prefer not to answer **(EXCLUSIVE)**

Q28. Which of the following, if any, have you experienced with respect to your smart meter? Please answer true or false to each of the statements as applicable. If a response does not apply to you (for example, if you haven't tried to see how many units you are using), please select not applicable. **ROTATE. PLEASE CLICK ON ANY ANSWERS THAT APPLY TO YOU IN THE LIST BELOW**

- | | True | False |
|--|------|-------|
| | NA | |
| 1. My energy bills have not been more accurate | | |
| 2. I have still had to have/provide some meter readings | | |
| 3. I have not been able to see how many units of energy I use live at any single point in time | | |
| 4. I have not been able to see how many units of energy I have used over a period of time eg per day, per week per month, per year | | |
| 5. I have not been able to see how much my energy is costing me live at any single point in time | | |
| 6. I have not been able to see how much my energy is costing me over a period of time eg per day, per week per month, per year | | |
| 7. It has not helped me reduce my energy consumption/usage as much as I thought it would | | |
| 8. It has not helped me reduce my energy consumption/usage as much as all | | |
| 9. It has provided new ways for me to top up my meter | | |
| 10. It has provided the option of new energy products and services | | |

Q29. Did **INSERT RESPONSE TO Q12 BUT IF Q12 = 11 “DON’T KNOW” OR 12 “PREFER NOT TO ANSWER” SHOW** your energy supplier **SHOW ALL** , or the installation company, mention anything about whether the smart meter might need to be changed or updated again by the year 2020?

1. Yes, definitely
2. Yes, I think so
3. No
4. Don't know
5. Prefer not to answer
6. No, I don't think so

Q30. **ASK IF Q29 = 1 OR 2, ELSE GO TO Q31:** What reason did they give for it needing to be changed?
PLEASE WRITE IN THE REASON IN THE BOX BELOW

Q31. **(ASK IF Q13 EQ 1 “YES”** Would your access to the smart meter data or functionality be affected in any way if you were to change to another **IF Q9 = 1 “SMART GAS METER” SHOW** gas supplier? **IF Q9 = 2 “SMART ELECTRICITY METER” SHOW** electricity supplier?) **(ASK IF Q13 = 2 “NO”** Was your access to the smart meter data or functionality affected in any way when you changed to your new **SHOW IF Q9 = 1 “SMART GAS METER”** gas supplier? **SHOW IF Q9 = 2 “SMART ELECTRICITY METER”** electricity supplier?)

1. Yes
2. No
3. Don't know
4. Prefer not to answer

Q32. **ASK IF Q31 = 1 “YES” ELSE GO TO Q34. SHOW IF Q13 = 1 “YES”** In what way would it be affected? **SHOW IF Q13 = 2 “NO”** In what way was it affected? **ROTATE 1-9 PLEASE CLICK ON ANY ANSWERS THAT APPLY TO YOU IN THE LIST BELOW**

1. Lose/lost the ability to have more accurate energy bills
2. Lose/lost the ability to avoid meter readings
3. Not able to see how many units of energy used live at any single point in time
4. Not able to see how many units of energy used over a period of time eg per day, per week per month, per year
5. Not be able to see how much energy costs are live at any single point in time
6. Not able to see how much your energy costs were over a period of time eg per day, per week per month, per year
7. Lose/lost the information needed to help support a reduction in energy consumption/usage
8. Lose/lost new means to top up
9. Lose/lost access to new services/products
10. Other effects **Please type your response in the box below**
11. None of these **(EXCLUSIVE)**
12. Don't know **(EXCLUSIVE)**
13. Prefer not to answer **(EXCLUSIVE)**

Q33. How did you find out that this would happen if you changed to a new **IF Q9 = 1 “SMART GAS METER” SHOW** gas supplier? **IF Q9 = 2 “SMART ELECTRICITY METER” SHOW** electricity supplier?

1. The supplier that installed it told me it would before the meter was installed
2. The supplier that installed it told me it would after the meter was installed
3. **[ONLY SHOW IF Q13 = 2 “NO”]** The supplier I moved to told me it would
4. Other **Please type your response in the box below**

5. Don't know (EXCLUSIVE)
6. Prefer not to answer (EXCLUSIVE)

Q34. **ASK IF Q31 = 2 "NO" ELSE GO TO Q35. SHOW IF Q13 NOT EQ 2 "NO"** How do you know it won't be affected? **SHOW IF Q13 = 2 "NO"** How did you know it would not be affected?

1. The supplier that installed it told me it wouldn't
2. **[ONLY SHOW IF Q13 = 2 "NO"]** The supplier I moved to told me it wouldn't
3. Other **Please type your response in the box below**
4. Don't know (EXCLUSIVE)
5. Prefer not to answer (EXCLUSIVE)

Q35. **Ask if Q33 NE 1, else go to Q37:** Thinking back to when the meter was first installed, if at that time you had been told that you could lose some of the smart meter functionality if you switched **SHOW IF Q9 = 1 "SMART GAS METER"** gas supplier **SHOW IF Q9 = 2 "SMART ELECTRICITY METER"** electricity supplier, but bearing in mind the benefits that would continue to apply if you did not switch supplier, would you still have allowed the smart meter installation to go ahead?

- Yes, definitely
- Yes, probably
- No, probably not
- No, definitely not
- Don't know

Q36. **ASK ALL:** Why do you say that?

Q37. What functions of the smart meter would you be **least happy** about losing on switching supplier if you were to lose any? **ROTATE 1-8 PLEASE SELECT AT LEAST 1 AND A MAXIMUM OF 3.**

1. More accurate energy bills
2. Being able to avoid meter readings
3. The ability to see how many units of energy you are using live at any single point in time
4. The ability to see how many units of energy you have used over a period of time eg per day, per week per month, per year
5. The ability to see how much your energy is costing you live at any single point in time
6. The ability to see how much your energy has cost you over a period of time eg per day, per week per month, per year
7. The information which would help in reducing your energy consumption/usage
8. New ways for me to top up my meter
9. Don't know (EXCLUSIVE)

Q38. Thinking of everything we have discussed, how satisfied are you overall with **SHOW IF Q9 = 1 "SMART GAS METER"** the smart gas meter installed by **SHOW IF Q9 = 2 "SMART ELECTRICITY METER"** smart electricity meter installed by **INSERT RESPONSE TO Q12 BUT IF Q12 = 11 "DON'T KNOW" OR 12 "PREFER NOT TO ANSWER"** **SHOW** your energy supplier. **SHOW ALL** Please answer on a scale of 1 to 10 where 1 means very dissatisfied and 10 means very satisfied. **PLEASE CLICK ON ONE OF THE BUTTONS BELOW**

- 1 - Very dissatisfied
- 2
- 3
- 4
- 5
- 6
- 7

- 8
- 9
- 10 – Very satisfied
- Don't know
- Prefer not to answer

Q39. IF Q38 = 1 TO 5 ASK, ELSE GO TO Q40: Why have you given that rating?

Q40. Finally we have some questions to help us analyse the findings of the survey. Please be assured that this information will remain confidential to Accent and will not be used to identify you to Citizens Advice or anyone else. First of all, which of the following age groups do you fall into? **READ OUT – SINGLE CODE PLEASE CLICK ON ONE OF THE ANSWERS BELOW**

- 1. 16-34
- 2. 35-49
- 3. 50-64
- 4. 65-74
- 5. 75+
- 6. Prefer not to say **THANK AND CLOSE**

Q41. IF CATI DO NOT ASK: RECORD GENDER. IF ONLINE ADD – Are you:

- 1. Male
- 2. Female
- 3. Prefer not to say

Q42. How would you describe the occupation type of the chief income earner in your household?

- 1 Senior managerial or professional
- 2 Intermediate managerial, administrative or professional
- 3 Supervisor; clerical; junior managerial, administrative or professional
- 4 Manual worker (with industry qualifications)
- 5 Semi and unskilled manual workers
- 6 Unemployed
- 7 Retired
- 8 Student
- 9 Prefer not to say **THANK & CLOSE**

Q43. IF Q42=7 ASK ELSE GO TO Q45 Do you have a state pension, a private pension or both?

- 1. State pension
- 2. Private pension
- 3. Both

Q44. IF Q43=2 OR 3 ASK ELSE GO TO Q45 How would you describe your occupation before you retired?

- Senior managerial or professional
- Intermediate managerial, administrative or professional
- Supervisor; clerical; junior managerial, administrative or professional
- Manual worker (with industry qualifications)
- Semi and unskilled manual workers
- None of these

Q44B And please can I check your postcode? Is it ...

Yes, correct
No, incorrect

Q44C ASK IF Q44B = 2 ELSE GO TO Q45: Please can I have your correct postcode **INTERVIEWER PLEASE DO YOU BEST TO GET THE FULL POSTCODE (DP: THEY SHOULD BE ALLOWED TO PROCEED WITHOUT COMPLETING IN FULL IF NEED BE)**

First half

Second half

Q45. We really appreciate the time that you have given us today. Would you be willing to be contacted again for clarification purposes or be invited to take part in other research for Citizens Advice?

1. Yes, for both clarification and further research
2. Yes, for clarification only
3. Yes, for further research only
4. No

Q46. **ASK IF Q45 = 1. "Yes, for both clarification and further research" or 3. "Yes, for research only" ELSE GO TO END STATEMENT.** Part of this project also involves us visiting some people in their homes to look at their smart meters and any related in home displays or information, and to ask a few more detailed questions about them. This would involve a 30 to 40 minute interview in your home conducted by one of Accent's executives. The interview would most likely be in the next couple of weeks. We would give £30 to thank you for your time. We can't at this point in time guarantee that you would be selected as we will need to choose participants to give us a representative sample of smart meter users. But if you are selected would you be willing to take part in this additional interview?

1. Yes
2. No

Q47. **SHOW IF Q46 = 1 "YES" ELSE GO TO CLOSING STATEMENT.** Thank you. We will telephone you with more information if you are selected.

PLEASE CLICK ON THE FORWARD BUTTON TO GO TO THE END STATEMENT

Thank you for your help in this research

I mentioned that we would send you a £10 Love2Shop voucher for taking part in this survey. Please can I take your full name and address so that I can post this to you?

DP: please insert usual name and address gathering question for incentives (email not needed)

This research was conducted under the terms of the Market Research Society's code of conduct and is completely confidential. If you would like to confirm Accent's credentials please call the MRS free on 0500 396999.

Further Recruitment for Non Smart Meter Households

Q48. We need to speak to a representative range of people who have not as yet had a smart meter installed in their home. **INTERVIEWER IF NECESSARY ADD** Please do not worry if you don't know much or anything about smart metering, we'd still like you to take part in the survey. Right now I'd just like to check you are in scope for the research. Please can you confirm that you live in **[DP: INSERT REGION FROM SAMPLE]**? This is only to check we have the right spread of participants across the UK.

1. South East
2. London
3. East
4. South West
5. West Midlands
6. East Midlands
7. Wales
8. North West
9. Yorkshire and Humberside
10. North East
11. Scotland
12. Northern Ireland

Q49. Which of the following age groups do you fall into? **READ OUT – SINGLE CODE, CONTINUE IF AGE QUOTA IS STILL OPEN, ELSE THANK AND CLOSE**

1. 16-34
2. 35-49
3. 50-64
4. 65-74
5. 75+
6. Prefer not to say **THANK AND CLOSE**

Q50. How would you describe the occupation type of the chief income earner in your household?

- 1 Senior managerial or professional
- 2 Intermediate managerial, administrative or professional
- 3 Supervisor; clerical; junior managerial, administrative or professional
- 4 Manual worker (with industry qualifications)
- 5 Semi and unskilled manual workers
- 6 Unemployed
- 7 Retired
- 8 Student
- 9 Prefer not to say **THANK & CLOSE**

Q51. **IF Q50=7 ASK ELSE GO TO Q53** Do you have a state pension, a private pension or both?

1. State pension
2. Private pension
3. Both

Q52. IF Q51=2 OR 3 ASK ELSE GO TO Q53 How would you describe your occupation before you retired?

- Senior managerial or professional
- Intermediate managerial, administrative or professional
- Supervisor; clerical; junior managerial, administrative or professional
- Manual worker (with industry qualifications)
- Semi and unskilled manual workers
- None of these

DP – CALCULATE SEG BASED ON Q50-Q52; QUOTA CHECK; THANK & CLOSE IF OUT OF SCOPE

Routing to Online or CATI Questionnaire

Q53. Thank you, you are in scope for the research. The survey will take 10 minutes. You do not have to answer questions you do not wish to and you can terminate the interview at any point. You can do this with me quickly over the phone now or we can send you a link so you can do this online if you can confirm your email address to me. Which would you prefer?

1. Continue by phone now
2. Continue by phone later **MAKE APPOINTMENT, THANK AND CLOSE**
3. Do the survey online
4. Do not wish to continue **THANK AND CLOSE**

Q54. ASK IF Q53 = “DO THE SURVEY ONLINE” ELSE GO TO Q56 Please can you give me your email address so that we can send you a link to the online survey

1. **Please enter email address here:**.....
2. **Please Confirm email address here:**

ONLY ALLOW INTERVIEW TO CONTINUE IF THE EMAIL ADDRESS IS THE SAME IN BOTH FIELDS.

3. Refused **PERSUADE AND REASSURE ELSE THANK AND CLOSE**

Q55. What name shall I send the email to? A first name is fine; this is only to address you at the start of the email. **INTERVIEWER IF ONLY FIRST NAME CAPTURED, LEAVE TITLE FIELD BLANK**

1. **Please enter title here** DROP DOWN BOX WITH Mr. Mrs. Ms. Dr.
2. **Please enter first name here:**
3. **Please enter surname here:**
4. Refused: **START EMAIL WITH “Dear Sir or Madam”**

INTERVIEWER CLARIFY THAT THE SENDER WILL SHOW Citizens Advice Smart

Meters

EMAIL HAS BEEN SENT. IF THE PARTICIPANT DOES NOT RECEIVE IT ASK THEM TO CLICK ON SEND/RECEIVE. IF THEY STILL DO NOT RECEIVE IT CHECK THE EMAIL ADDRESS ON THE PREVIOUS SCREEN. PLEASE NOTE THAT CERTAIN VIRUS SOFTWARES CAN BLOCK DELIVERY FOR UP TO 2 MINUTES UNLESS PARTICIPANT EXITS.

Q55a Thank you for agreeing to take part in this research. Please can you complete the questionnaire by **INSERT DATE = interview date + 7 days, except anyone recruited from 4 February onwards when cut off date is 10 February**

And finally, just to say again that this research is being conducted under the terms of the MRS code of conduct and is completely confidential. If you would like to confirm Accent's credentials, please call the Market Research Society free on 0500 396999.

Initial email invitation text

Email heading = Citizens Advice Survey on Smart Meters

Dear **ENTER TITLE AND SURNAME, OR FIRST NAME IF NO TITLE OR SURNAME GIVEN, FROM Q55** ie show Q7.1 title + Q7.3 surname if Q7.1 and 7.3 are filled in. If Q7.2 is filled in show only Q7.2 first name only, no title , no surname), no comma at end of name in email

Thank you once again for agreeing to take part in this research which we at Accent are conducting on behalf of Citizen's Advice.

We will be asking some questions about smart metering. Please do not worry if you don't know much or anything about smart metering, we would still like you to take part in the research.

Any answer you give will be treated in complete confidence in accordance with the Code of Conduct of the Market Research Society. You do not have to answer questions you do not wish to and you can terminate the interview at any point.

Please could you complete the survey by **INSERT DATE = interview date + 7 days, except anyone recruited from 4 February onwards when cut off date is 10 February 2016..**

Please click on the secure link below to start the survey.

Yours sincerely

Seán Brennan
Project Manager

Reminder email text

Dear **ENTER TITLE AND SURNAME, OR FIRST NAME IF NO TITLE OR SURNAME GIVEN, FROM Q55** ie show Q7.1 title + Q7.3 surname if Q7.1 and 7.3 are filled in. If Q7.2 is filled in show only Q7.2 first name only, no title , no surname), no comma at end of name in email

You may recall that you agreed to take part in research about smart meters which we at Accent are conducting on behalf of Citizen's Advice.

We are emailing you again because you have not completed the survey yet and the deadline for doing so is **INSERT DATE = interview date + 7 days, except anyone recruited from 4 February onwards when cut off date is 10 February 2016. .** Please do not worry if you don't know much or anything about smart metering, we would still like you to take part in the research.

Any answer you give will be treated in confidence in accordance with the Code of Conduct of the Market Research Society. You do not have to answer questions you do not wish to and you can terminate the interview at any point.

Please click on the secure link below to access the survey.

Yours sincerely
Seán Brennan
Project Manager

Main Questionnaire Introduction for Online Participants with No Smart Meter Only

Dear ENTER TITLE AND SURNAME, OR FIRST NAME IF NO TITLE OR SURNAME GIVEN, FROM Q55

This survey should take 5-10 minutes to complete. However, should you need to stop part way through the survey you can complete the rest later; you will automatically return to the last question you answered when you go back into the survey.

Your answers are automatically saved each time you click on the forward button at the bottom of each web page. You can look at your previous answers by pressing the back button.

If you leave the survey idle for more than 30 minutes you will be logged out automatically, but all of your completed answers will be saved.

If you have any questions please contact Seán Brennan at Accent. His email address is sean.brennan@accent-mr.com. He will be glad to help you.

Q56. This research is about the roll out of smart meters into UK households which has begun and is expected to be completed by 2020. As I mentioned at the beginning of the call, a smart meter is one which sends meter readings automatically to your energy company, so that people no longer need to have, or provide, meter readings. It may also be linked to an in-home display device or a website which allows people to see how much energy they are using and what it costs in pounds and pence. Were you aware of the rollout of smart meters before we contacted you for this research?

1. Yes
2. No

Q57. **ASK IF Q56 = 1, ELSE GO TO Q59:** And are you aware of any of the specific benefits of smart meters to households?

1. Yes
2. No

Q58. **ASK IF Q57 = 1, ELSE GO TO Q59:** Please can you indicate which, if any, of the following benefits of smart meters you were aware of before we contacted you? **ROTATE**

- | | Unaware | Aware |
|---|---------|-------|
| 1. More accurate energy bills / no estimated bills | | |
| 2. No need for meter readings | | |
| 3. The ability to see how many units of energy you are using live at any single point in time | | |
| 4. The ability to see how many units of energy you have used over a period of time eg per day, per week per month, per year | | |
| 5. The ability to see how much your energy is costing you live at any single point in time | | |
| 6. The ability to see how much your energy has cost you over a period of time eg per day, per week per month, per year | | |
| 7. Provision of information to help reduce a household's energy consumption/usage | | |
| 8. New ways for those with prepayment meters to top up their meter | | |
| 9. The provision of (the option of) new energy products and services | | |

Q59. The following is a list of the key benefits. Please can you say how useful you would find each of the following functions of a smart meter if you had one? Please use a scale of 1 to 10, where 1 means not at all useful and 10 means very useful. **DP: PLEASE INSERT A SCALE OF 1 TO 10 FOR EACH ROW WITH STATEMENT "NOT AT ALL USEFUL" ABOVE 1 AND "VERY USEFUL" ABOVE 10. ALSO 11 FOR DON'T KNOW AND 12 FOR PREFER NOT TO ANSWER. ROTATE. PLEASE CLICK ON ONE OF THE BUTTONS BELOW FOR EACH FUNCTION**

1. More accurate energy bills / no estimated bills
2. No need for meter readings
3. The ability to see how many units of energy you are using live at any single point in time
4. The ability to see how many units of energy you have used over a period of time eg per day, per week per month, per year
5. The ability to see how much your energy is costing you live at any single point in time
6. The ability to see how much your energy has cost you over a period of time eg per day, per week per month, per year
7. Provision of information to help reduce your household's energy consumption/usage
8. New ways for those with prepayment meters to top up their meter
9. The provision of (the option of) new energy products and services

Q60. Knowing the key benefits of a smart meter, how appealing is the idea of having a smart meter to you? Please answer on a scale of 1 to 10 where 1 is not at all appealing and 10 is extremely appealing. **PLEASE CLICK ON ONE OF THE BUTTONS BELOW**

- 1 - Not at all appealing
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10 - Extremely appealing
- Don't know
- Prefer not to answer

Q61. You gave a score of **INSERT RESPONSE TO Q61 OUT OF 10**. Why did you give that score?

1. **Please type your response in the box below**.....
2. Don't know (**EXCLUSIVE**)
3. Prefer not to answer (**EXCLUSIVE**)

Q62. If you had a smart meter, how regularly do you think you would look at the information it provided on energy usage and costs?

1. Daily
2. A few times a week
3. Once a week
4. Once a fortnight
5. Once a month
6. Once a quarter
7. Other **PLEASE WRITE IN**
8. Don't know
9. Prefer not to answer

Q63. **ASK IF Q56 = 1, ELSE GO TO Q65:** Are you aware of any differences or issues between different types of smart meters that are being developed and installed?

1. Yes
2. No

Q64. **ASK IF Q63 = 1, ELSE GO TO Q65:** What differences or issues are you aware of? **PLEASE WRITE ALL AWARE OF IN THE BOX BELOW**

Q65. **ASK ALL:** Do you know whether or not your access to the smart meter data or functionality would be affected in any way if you were to change to another energy supplier?

1. No, I don't know
2. Yes, I have/think I have heard that it would be affected
3. Yes, I have/think I have heard that it would not be affected
4. Prefer not to answer

Q66. **ASK IF Q65 = 2 "Yes, I have/think I have heard that it would be affected" ELSE GO TO Q67.** Do you know in what way would it be affected? **ROTATE RESPONSES 1-9 PLEASE CLICK ON ANY ANSWERS THAT APPLY TO YOU IN THE LIST BELOW**

1. Households would lose the ability to have more accurate energy bills
2. Households would lose the ability to avoid meter readings
3. Households would not be able to see how many units of energy were being used live at any single point in time
4. Households would not be able to see how many units of energy were being used over a period of time eg per day, per week per month, per year
5. Households would not be able to see how much their energy costs were live at any single point in time
6. Households would not be able to see how much their energy costs were over a period of time eg per day, per week per month, per year
7. Households would lose the information needed to help support a reduction in energy consumption/usage
8. Households with prepayment meters would lose new ways to top up their meter
9. Households would lose (the option of) new energy products and services
10. Other effects **Please type your response in the box below**
11. Don't know **(EXCLUSIVE)**
12. Prefer not to answer **(EXCLUSIVE)**

Q67. **ASK IF Q65 = 2 "Yes, I have/think I have heard that it would be affected" ELSE GO TO Q68.** How did you find out that this could happen if someone with a smart meter switches to a new supplier?

1. My energy supplier told me
2. Another energy supplier told me
3. From a relative/friend/colleague
4. In the media
5. Other **Please type your response in the box below**
6. Can't remember
7. Prefer not to answer **(EXCLUSIVE)**

Q68. Have you ever considered asking for a smart meter, or been offered a smart meter, by your supplier?

1. Yes, considered asking for one

2. Yes, was offered one
3. No
4. Prefer not to say

Q69. **ASK IF Q68 = 1 or 2 “Yes, considered asking for one OR Yes, was offered one”, ELSE GO TO**

Q70: Why didn't you have a smart meter installed? PLEASE TYPE YOUR RESPONSE IN THE BOX BELOW

Q70. I would like you to imagine that you had decided to have a smart meter installed, and that, having made this decision, you were then told that you might lose some of the smart meter functionality if you switched supplier. Bearing in mind the benefits that would continue to apply if you did not switch supplier, do you think that you would still have the smart meter installed?

- Yes, definitely
- Yes, probably
- No, probably not
- No, definitely not
- Don't know

Q71. Why do you say that?

Q72. **ASK ALL: What functions of the smart meter would you be least happy about losing in this scenario? INTERVIEWER: If participant asks what you mean say “Imagining some of these functions could disappear, which ones would you really NOT want to lose or LEAST want to lose in the following list?” ROTATE 1-9 PLEASE SELECT AT LEAST 1 AND A MAXIMUM OF 3.**

1. More accurate energy bills
2. Being able to avoid meter readings
3. The ability to see how many units of energy you are using live at any single point in time
4. The ability to see how many units of energy you have used over a period of time eg per day, per week per month, per year
5. The ability to see how much your energy is costing you live at any single point in time
6. The ability to see how much your energy has cost you over a period of time eg per day, per week per month, per year
7. The information which would help in reducing your energy consumption/usage
8. New ways to top up a prepayment meter
9. (The option of) new energy products and services
10. Don't know (**EXCLUSIVE**)

Q73. Finally we have one question which will help us analyse the findings of the survey. Please be assured that this information will remain confidential to Accent and will not be used to identify you to Citizens Advice or anyone else. Please can you tell me whether you are a pre-payment customer or a credit customer for your electricity and gas? **MULTICODE PLEASE CLICK ON ANY OF THE ANSWERS BELOW THAT APPLY TO YOU**

Electricity Gas

1. Pre-payment customer (ie 'Pay As You Go' by key or card)
2. Credit customer (eg cash, cheque, direct debit)
3. No gas
4. Prefer not to answer (**EXCLUSIVE**)

Q74. We really appreciate the time that you have given us today. Would you be willing to be contacted again for clarification purposes or be invited to take part in other research for Citizens Advice in the future?

1. Yes, for both clarification and further research
2. Yes, for clarification only
3. Yes, for further research only
4. No

Q75. ASK IF Q74 = 1. "Yes, for both clarification and further research" or 3. "Yes, for research only" ELSE GO TO END STATEMENT. Part of this project also involves us visiting some people in their homes to ask them some more detailed questions about smart meters. This would involve a 30 to 40 minute interview in your home conducted by one of Accent's executives. The interview would most likely be within the next couple of weeks. We would give £30 to thank you for your time. We can't at this point in time guarantee that you would be selected, but if you are selected would you be willing to take part in this additional interview?

1. Yes
2. No

Q76. SHOW IF Q75 = 1 "YES" ELSE GO TO CLOSING STATEMENT. Thank you. We will telephone you with more information if you are selected.

Thank you for your help in this research

This research was conducted under the terms of the MRS code of conduct and is completely confidential. If you would like to confirm Accent's credentials, please call the MRS free on 0500 396999.

Please can we take a note of your name and where we can contact you for quality control purposes?

Participant's name:

Telephone: home: work:

Thank you

Accent confirms that this interview was conducted under the terms of the MRS code of conduct and is completely confidential

APPENDIX B

Smart Meter Topic Guide



2962

Early Consumer Experiences / Perceptions of Smart Meters

Final Depth Topic Guide – Smart Meter Users

Moderator:

Depth participant:

Date:

Time:

Complete from quant interview data before depth	
Date installed (Q11)	
Supplier of smart meter (Q12)	
Customer type (Q14)	

Good morning/afternoon/evening... My name is ... and I work for an independent market research company called Accent. As one of my colleagues will have told you, we are conducting research for Citizens Advice into electricity and gas meters. The Citizens Advice service provides the advice that people need to help them with the problems they face and aims to improve the policies and practices that affect people's lives. This research will help inform policies related to the roll out of smart meters in the UK. Thank you very much for agreeing to help us with this research.

The research is being conducted in accordance with the Code of Conduct of the Market Research Society (MRS) and also with the Data Protection Act, with whom Accent is registered. This means that everything you say is confidential and will not be attributed to you personally unless you give your permission for us to pass your comments on in named format.

Our discussion is being tape-recorded. This is standard market research procedure and is to ensure accuracy – so I do not have to try to remember what you have said – and is for analysis purposes only. The recordings will not be passed to any third party not associated with the research project, and in our reporting of the findings from this research everything that you say will be confidential and will be reported in grouped format only, again, unless you give your permission for us to pass your comments on in named format.

The discussion will last around 40 minutes.

Can I stress that we are looking for your views. There are no right or wrong answers. Some of the questions may be very similar to questions you were asked in the first interview, but in this interview I will be exploring your answers a little more to get a deeper understanding of them.

SECTION A: Meter Installation 10 mins (10)

- I'd like to start by talking about the reasons you had a smart meter installed, but can I first check whether you have an electricity smart meter, a gas smart meter or both?
- I understand it was installed by **(READ OUT SUPPLIER FROM TABLE ABOVE)**. Did you ask to have it installed, did they ask you if you'd like a smart meter or were you told it was mandatory?
- **If customer asked:**
 - a. Why did you ask for one? **(PROBE FOR WHO/WHAT PROMPTED THEM)**
 - b. What benefits did you expect to get from having one? **(PROBE IN FULL)**
 - c. Did you foresee any limitations or disadvantages? Anything else? **(PROBE IN FULL)**
- **If supplier offered:**
 - d. How did they offer you a smart meter? (eg by phone, email etc)
 - e. And why did they offer you a smart meter? What benefits did they say it would offer you? Anything else? **(PROBE IN FULL)**
 - f. Did they mention any limitations or disadvantages? Anything else? **(PROBE IN FULL)**
- **If supplier said it was mandatory:**
 - g. How did you feel about the change of meter being mandatory? **(PROBE IN FULL)**
 - h. How did they tell you about the change to a smart meter? (eg by phone, email etc)
 - i. And why did they say it needed to be installed? Did they tell you about benefits it would offer you? Anything else? **(PROBE IN FULL)**
 - j. Did they mention any limitations or disadvantages? Anything else? **(PROBE IN FULL)**
 - k. Would you have liked to have had a choice over whether or not the smart meter was installed? Why?/Why not? **(PROBE IN FULL)**
- How did the installation itself go – were you happy with it?
- Did it happen at the expected time and date?
- When the installation took place, did the installer mention what benefits you would get from having a smart meter? If so, what did they say?
- And did the installer (not your supplier) say there would be any limitations or disadvantages of having a smart meter installed? If so what did they say?
- Were you offered an in home display, when your meter was installed and, if yes, did you accept it? **(EXPLAIN IF NEED BE: An in home display is a portable device which allows you to see how much energy you are using (past and present) and how much it costs in pounds and pence) (IF OFFERED BUT DID NOT ACCEPT, PLEASE PROBE FOR FULL REASON[S] WHY; PLEASE ALSO RECORD WHETHER YOU HAD TO EXPLAIN WHAT THIS WAS)**
- Did he or she show you how to use your in home display? **If yes:** How satisfied or dissatisfied were you with the **explanation** the installer gave you? Why? **(EXPLORE REASON FOR WHATEVER RESPONSE WAS GIVEN)**
- Did your installer offer you the ability to see energy information or costs from your smart meter online and/or through a mobile app? If yes did you accept the offer? **(IF OFFERED BUT DID NOT ACCEPT, PLEASE PROBE FOR FULL REASON[S] WHY)**
- Did he or she show you how to use the online information and/or App? **If yes:** How satisfied or dissatisfied were you with the **explanation** the installer gave you? Why? **(EXPLORE REASON FOR WHATEVER RESPONSE WAS GIVEN)**
-

- Did the installer offer any advice or information about better managing your energy during the visit? **(PROBE FOR WHETHER THIS WAS VERBAL ADVICE OR WHETHER THEY LEFT INFORMATION BOOKLETS OR SOMETHING ELSE)**
- **If yes:** How useful did you find this information? Why? **(EXPLORE REASON FOR WHATEVER RESPONSE WAS GIVEN)**
- Did the installer provide a demonstration of the smart meter that they installed? By this I mean the actual smart meter and not any display device, online information or App they may also have shown you.
- **If yes:** How satisfied or dissatisfied were you with the demonstration the installer gave you of the smart meter? Why? **(EXPLORE REASON FOR WHATEVER RESPONSE WAS GIVEN)**

SECTION B: Meter / IHD/ Data Usage 5 mins (15)

- I'd now like to talk about how you have been using the smart meter. Are you looking at the display/online information/App or using the smart meter data in any way? **(IF YES, RECORD WHAT AND HOW)**
- **If yes:**
 - l. How easy do you find it to use? **IF NOT EASY:** Why? What difficulties have you had using it? Are these resolved now? Have you spoken to the supplier about them? **If no:** why not?
 - m. How often are you looking at the display, or online information or the app?
 - n. What are you looking at in particular? What do you find most useful? Why? Now that you have had experience of the display/online information/app, how would you feel if you didn't have this?
- **If no:**
 - o. Why aren't you looking at the display/online information/App or using the information they provide?
 - p. Did you try to and have problems with it? **If yes:** what problems? Did you talk to the supplier to try to resolve them? What happened?
 - q. Would you like to be looking at the display/online information/App or using the information they provide? Why? Why not?

SECTION C: Benefits/Expectations 5 mins (20)

- We've talked about what benefits you expected/or the supplier told you you would get from the smart meter before it was installed. But what benefits have you gained from it since having it installed? **(PROBE: IF SEVERAL, WHICH ARE THE GREATEST BENEFITS)**
- Has it matched your expectations, exceeded them, or failed to meet them? Why? In what specific areas has it met/failed to meet expectations? Why/how? **(EXPLORE REASON FOR RESPONSE IN FULL)**
- **If it has failed in some areas:** Have you talked to your smart meter supplier about this/these? And what did they say? What happened as a result?
- What, if any, [other] issues have you encountered with your meter? **(EXPLORE IN FULL, PROBING FOR FUNCTIONALITY, BILLING, ANYTHING ELSE?)**

SECTION D: The Future 15 mins (35)

- Thinking back to when you had your meter installed, which was in **(INSERT DATE FROM Q11 AT THE START OF THE TOPIC GUIDE)**, did your energy supplier, or the installation company, mention anything about whether the smart meter might need to be changed or updated again by the year 2020?
- **If yes:** What did they say? What reason did they give for it needing to be changed? **(PROBE IN FULL)**
- Do you know whether your access to the smart meter data or what the smart meter does would be affected in any way if you were to change to another energy supplier for electricity and/or gas **(READ OUT BASED ON WHAT FUEL THEIR SMART METER IS FOR)**? Or have you already switched/tried to switch?
- **If yes:**
 - In what way would it be affected/was it affected?
 - How did you find out that this would happen if you changed to a new supplier? **(PROBE FOR WHETHER THEY WERE TOLD BY THE SUPPLIER, THE INSTALLER, SOMEONE ELSE, SOME OTHER WAY OR WHETHER THEY JUST FOUND OUT WHEN THEY SWITCHED/TRIED TO SWITCH)**
 - How do you feel about this (potential) loss the smart meter's functions?
 - Do you feel you were adequately informed about the potential loss of functions by your energy supplier **(ADD IF SWITCHED at the time it was installed)**? How does that make you feel about the energy supplier **(ADD IF SWITCHED that installed your meter)**?
 - **ASK IF SWITCHED OR IF CONSIDERED SWITCHING** Do you feel you were adequately informed about the potential loss of functions by the energy supplier you considered switching to? How does that make you feel about this other energy supplier?
- **If no:** How do you/did you know it won't be affected? **(PROBE FOR WHETHER THEY WERE TOLD BY THE SUPPLIER, THE INSTALLER, SOMEONE ELSE, SOME OTHER WAY, JUST AN ASSUMPTION ETC)**
- Thinking back to when the meter was first installed, if at that time you had been told that you could lose **some of** the current smart meter functions if you switched supplier, would you still have allowed the smart meter installation to go ahead?
- Why? Why not? **(IF DON'T KNOW, EXPLORE WHAT IT WOULD DEPEND UPON)**
- What about if you had been told that they this issue would be fixed in a few years so that you could switch without losing any functions, would you still have switched? Why? Why not?
- What functions of the smart meter would you be least happy about losing if you were to lose any? Why?
- Meters installed before 2016 may lose some of their functions if a householder switches suppliers. Newer meters that will likely become available at some point in 2016 will fix this. Were you aware of this? If so how did you find out?
- **IF UNAWARE:** If you had been told this, would you have waited to have your smart meter installed once this had been fixed or would you still have gone ahead with your current meter? Why do you say that? **(PROBE IN FULL)** How does this now make you feel about the energy supplier that installed your smart meter?

SECTION E: Summary 5 mins (40)

- Thinking of everything we have discussed, how satisfied are you overall with your smart meter?
- Why?
- Do you have any other comments or thoughts about smart meters, or the Government's mandated roll out of smart meters, that you would like to discuss?

Close

Thank you very much for your time today.

I mentioned at the beginning of the interview that all of your responses will be treated in complete confidence in line with Market Research Society guidelines, unless you give your permission for them to be attributed to you. Are you happy for the answers that you gave me today to be directly attributed to you? If you are not happy for them to be attributed to you I can confirm that they will remain confidential and will only be used in grouped format for analysis purposes. **SINGLE CODE**

- Yes, I am happy for my answers to be attributed to me and directly passed back to [insert client name]
- No, keep my answers anonymous

Can I also ask whether you would be happy to be contacted again to take part in other research for Citizens Advice?

Yes

No

APPENDIX C

Non-Smart Meter Topic Guide

Moderator:

Depth participant:

Date:

Time:

Complete from quant interview data before depth

Customer type (Q73)

Good morning/afternoon/evening... My name is ... and I work for an independent market research company called Accent. As one of my colleagues will have told you, we are conducting research for Citizens Advice into electricity and gas meters. The Citizens Advice service provides the advice that people need to help them with the problems they face and aims to improve the policies and practices that affect people's lives. This research will help inform policies related to the roll out of smart meters in the UK. Thank you very much for agreeing to help us with this research.

The research is being conducted in accordance with the Code of Conduct of the Market Research Society (MRS) and also with the Data Protection Act, with whom Accent is registered. This means that everything you say is confidential and will not be attributed to you personally unless you give your permission for us to pass your comments on in named format.

Our discussion is being tape-recorded. This is standard market research procedure and is to ensure accuracy – so I do not have to try to remember what you have said – and is for analysis purposes only. The recordings will not be passed to any third party not associated with the research project, and in our reporting of the findings from this research everything that you say will be confidential and will be reported in grouped format only, again, unless you give your permission for us to pass your comments on in named format.

The discussion will last around 30 minutes.

Can I stress that we are looking for your views. There are no right or wrong answers. Some of the questions may be very similar to questions you were asked in the first interview, but in this interview I will be exploring your answers a little more to get a deeper understanding of them.

SECTION A: Benefits/Expectations of Smart Meters 10 mins (10)

- This research is about the roll out of smart meters into UK households which has begun and is expected to be completed by 2020. Are you aware of any of the specific benefits of smart meters to households? **(PROBE FOR ALL THEY ARE AWARE OF; IF NEEDED SHOW PICTURES OF SMART METERS & DISPLAYS IN SHOWCARD A & B)**
- **If aware of some benefits ask:** Were you aware of these before my colleague called you or did you learn about them in the call? **(RECORD WHICH THEY KNEW ABOUT BEFORE)**
- My colleague explained to you how smart metering works and they read you a list of the key benefits when she or he spoke to you. I'm going to show them/read them out to you now; please can you tell me how useful you would find it and why? **(USE SHOWCARD C; RECORD USEFULNESS & REASON FOR THIS FOR EACH)**
- Knowing the key benefits of a smart meter, how appealing or unappealing is the idea of having a smart meter to you? Why? **(EXPLORE REASON FOR RESPONSE GIVEN IN FULL)**
- I just want to ask you in a little more depth how appealing or unappealing the following functions are to you and why **(EXPLORE REASON FOR RESPONSE GIVEN IN FULL)**
 - More accurate energy bills/no estimated bills
 - No need for meter readings
 - The ability to see how many units of energy you are using live at any single point in time
 - The ability to see how many units of energy you have used over a period of time eg per day, per week, per month, per year
 - The ability to see how much your energy is costing you live at any single point in time
 - The ability to see how much your energy has cost you over a period of time eg per day, per week per month, per year
 - Provision of information to help reduce your household's energy consumption/usage
 - **ASK IF Q73 = PREPAYMENT CUSTOMER** New ways for those with prepayment meters to top up their meter **(MODERATOR NOTE: these could include - Over the phone, By SMS (Text message), Online, Via an app, Via a PPmid [an advanced IHD])**
- If you had a smart meter, how regularly do you think you would look at the information it provided on energy usage and costs? Why? **(EXPLORE REASON FOR RESPONSE AND WHAT MIGHT PROMPT THEM TO LOOK AT IT)**

SECTION B: Awareness of Different Meter Types/Attitudes to Uptake 15 mins (25)

- Are you aware of any differences or issues between different types of smart meters that are being developed and installed?
- **If yes:**
 - What differences or issues are you aware of? **(PLEASE PROBE IN FULL)**
 - Where have you heard about these?
- If you were to have a smart meter, do you know what would happen if you were to switch to another supplier? By this I mean would the smart meter data or the functions you could use be affected in any way if you were to change supplier?
- **If they say they think it would ask:**
 - Do you know in what way it would be affected?

○ Where did you hear that? How did you find out that this could happen if someone with a smart meter switches to a new supplier?

● Have you ever considered asking for a smart meter, or been offered a smart meter, by your supplier?

● When was that?

● Why didn't you have a smart meter installed? **(PLEASE PROBE IN FULL)**

● I would like you to imagine that you had decided to have a smart meter installed, and that, having made this decision, you were then told that you might lose some of the smart meter's functions or the data you could see if you switched supplier. Bearing in mind the benefits that would continue to apply if you did not switch supplier, do you think that you would still have the smart meter installed? And what about if you were told that these issues would eventually be fixed, but that you may lose some functions if you switched before they were – how might that affect your decision?

● Why do you say that? **(PLEASE PROBE IN FULL WHATEVER RESPONSE GIVEN)**

● How would you feel about your energy supplier if you were in this position?

● What functions of the smart meter would you be least happy about losing in this scenario? Why do you say that? **(IF NEED BE PROMPT WITH SHOWCARD A)**

● If, on the other hand, your energy supplier was to have said to you that if you waited until 2016 you would have a smart meter installed that would definitely not lose some of its functions if you were to switch suppliers what would you have done? Would you have waited? Would that have changed your decision?

SECTION E: Summary 5 mins (30)

● Do you have any other comments or thoughts about smart meters, or the Government's mandated roll out of smart meters, that you would like to discuss?

Close

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Yes, I am happy for my answers to be attributed to me and directly passed back to [insert client name]

No, keep my answers anonymous

Can I also ask whether you would be happy to be contacted again to take part in other research for Citizens Advice?

Yes

No

APPENDIX D

Photos

Photograph of an electric smart meter owned by one of the smart meter users



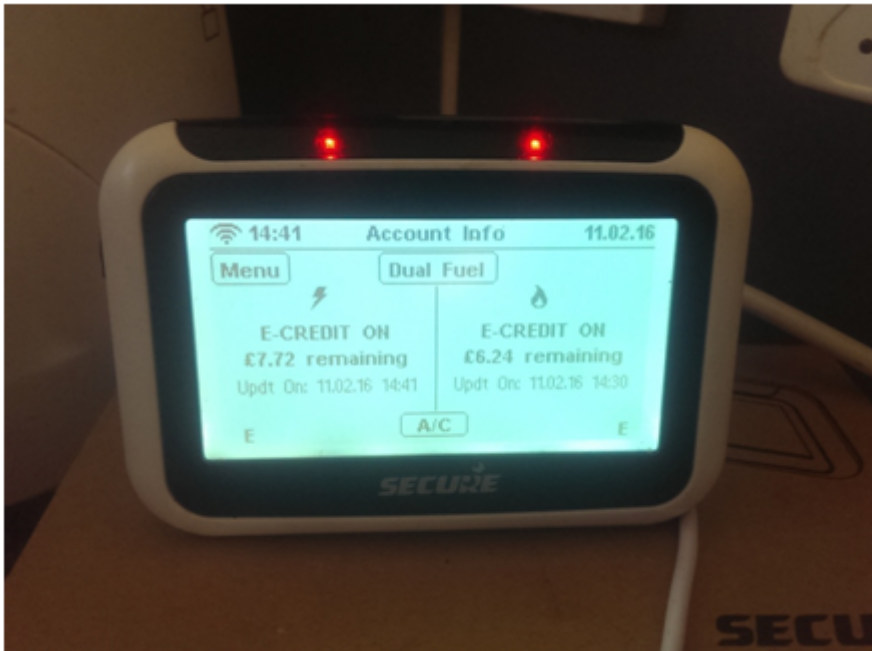
(Female, Aged 35-49, Social Class B)

Photograph of a gas smart meter owned by one of the smart meter users



(Female, Aged 35-49, Social Class B)

Photograph of an In-Home Display owned by one of the smart meter users



(Female, Aged 35-49, Social Class E)