

Putting the Customer First

How we can drive real
consumer engagement
with energy

SSE and YouGov Report 2014





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“ At SSE, we do listen to our customers. When they told us they were worried about future price rises, we responded with the longest-ever unconditional freeze on standard household energy prices. ”



“ This industry has a huge challenge but I believe this research is a great edition to the search for solutions. ”



CEO of SSE Alistair Phillips-Davies

For all the debate about the energy industry in recent months and years, I believe there is one voice in particular which has not been heard clearly enough: that of the customer.

At SSE, we provide energy to around five million homes and businesses in Great Britain and Ireland. But it's not the energy itself that's important; it's what that energy enables people to do.

Heat, light and technology empower and enrich our lives. This survey underlines that fact. People told us they believe energy is more important than ever to the way we live, and that it will only become more important in the future. And although most people believe that energy costs will increase significantly in the future – and we are seeing healthy levels of engagement with the market around switching and interacting with suppliers – this is not translating into sufficient individual action to get the most out of the actual energy they use.

This is not just a problem for energy suppliers, the Government, or anyone else to tackle on their own. It's absolutely critical to meeting the significant challenge of providing clean, reliable and above all affordable energy in the future. Greater consumer engagement with energy can help meet every aspect of the energy challenge. So we need to work together on this.

We all know the energy sector needs huge investment in the coming years, and that this investment will come at a cost, which at the moment is due to be paid for through energy bills. If we're to keep energy affordable, we need to realise corresponding savings through more efficient energy use. That relies on consumer engagement with energy that is broader and deeper than at present, and that won't happen unless we all listen very closely to the customer and put them first. At SSE, we want a two-way conversation with customers and this report is part of that.

We have a history of taking action to make a difference. When customers told us they were worried about future price rises, we responded with the longest-ever unconditional freeze on standard household energy prices, giving them total peace of mind until at least 2016.

And this report gives us more food for thought: whether it's finding fairer, more cost-effective and more appealing ways to deliver large-scale household energy efficiency improvements, simplifying bills to help people understand what they are paying, or giving them more flexibility about how they engage with and get the most from their smart meter.

This report provides fresh and meaningful insights that we can all act on, working together to drive broader and deeper consumer engagement with energy.



CEO of YouGov Stephan Shakespeare

I am delighted that YouGov has been able to partner with SSE for this important report. Putting the public voice at the centre of the most important issues facing the country is what YouGov's work is all about.

Our "Energy, Politics and the Consumer" report from the Spring of this year, produced in conjunction with Cambridge University and with SSE's participation, helped to lift the views of the public against a backdrop of political noise, and this report builds on those findings by looking forward to solutions that everyone in the industry is working towards.

What is again clear from the research is that even though this sector remains one where customer trust is low and an expectation of real change is limited, awareness of the facts around general energy issues also remains low leaving public opinion to be increasingly influenced by political reaction and the lens of the media. The public cannot be expected to get behind policies designed to solve the energy trilemma if

they do not receive full and clear information and if, as we have seen, policies are liable to either unravel under public pressure or be made on the hoof.

It is though encouraging in this report to see the public taking steps to make the lifestyle changes that are part of the solution. People do generally want to do their bit both to cut costs and to help the environment; but investing their limited and stretched funds into energy saving activities is beyond the ability of many and is all too much "jam tomorrow".

However, simpler and better information may be able to help even though energy costs represent a major barrier within the existing communication process. There is a positive role here for all the market's participants and influencers, especially if they can work together.

Recently I have spent a lot of time talking to industry leaders across a number of sectors, particularly around the lack of trust that exists between so many large businesses and the public. The energy sector has found itself at the forefront of this but I firmly believe that the best way to turn this around is by a new relationship between companies and their customers built on better communication to fill any potential void that politicians can step into.

This industry has a huge challenge in delivering reliable, sustainable and fairly priced energy to an increasingly energy-thirsty public but I believe this research is a great addition to the search for solutions.

Summary

The UK public's disaffection with the household energy sector is well documented. And yet, with the UK facing up to the challenge of ensuring a reliable, low-carbon yet affordable supply of energy, many of the proposed solutions hinge on consumer engagement with energy that is much broader and deeper than at present. Without committed public support and participation, the UK's ability to make the transition to a low-carbon future without compromising security of supply or rendering bills unaffordable is in jeopardy.

So just how engaged are consumers with energy in their daily lives and what barriers must be overcome in order to drive real engagement?

This question is at the centre of a new research study conducted exclusively for this report. YouGov interviewed a representative sample of 2,400 members of the UK public in mid-September 2014, to get a unique insight into what consumers really think about energy and what this means for how industry, government and all stakeholders can work together to engage them with the energy challenge.

Affordability dominates consumer perceptions of the energy challenge

The research puts into stark relief the tension between affordability and other aspects of the energy 'trilemma'. Although energy remains the number one concern when it comes to household expenditure, the broader energy challenge barely registers when compared with other societal concerns like healthcare, immigration and the economy.

The public is so focused on the cost of its household energy that all other concerns are secondary.

The public is so focused on the cost of its household energy that all other concerns are secondary. Even though individuals may wish to do their bit to help the environment or to prioritise reliable supply, only when these can be combined with cost savings do many feel they can get on board. As one respondent put it, "if I can't afford it, I can't have it, whether it's reliable or not, or if it's screwing the planet or not," while another said "I would like to be more enviro friendly but I can't afford to worry about it".

Most consumers think the costs of doing more to reduce their energy use are too high

This research shows that people are trying to make changes in order to reduce their usage but they are more likely to be small changes requiring little or no capital outlay, and little or no impact on lifestyle. Meanwhile our demand doesn't look like abating – most people believe that energy powered appliances and gadgets improve their quality of life and that energy is going to become more important to the way they live in future, and more expensive, yet less than half think reducing energy consumption would save them money while still having little or no effect on their quality of life.

This research shows that people are trying to make changes in order to reduce their usage.

More informed consumers will engage in reducing consumption

The report also suggests that arming customers with more accessible information about their usage, in a way that suits their preferences, could help drive greater engagement and reductions in energy consumption. Few respondents to the survey say they are confident they understand their energy bills, with most asking for increased simplicity. There is little agreement about what the best home improvements might be to save them the most money. And despite plans to install a smart meter in every single UK home by 2020, only half are interested in having a smart meter in the expectation it may increase understanding of usage and so help reduce costs.

Consumer needs and concerns must be put at the heart of the energy debate

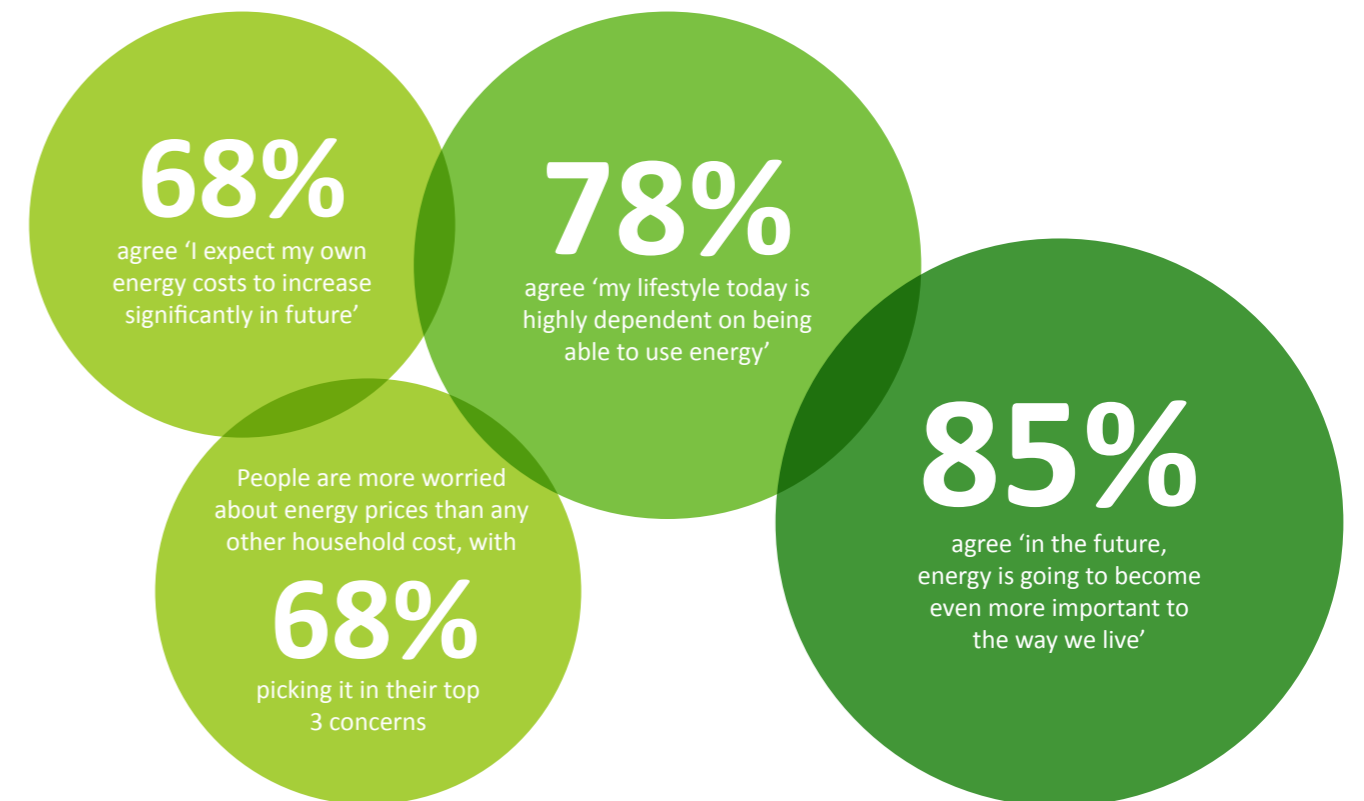
Fundamentally, the report concludes that policies alone are not sufficient to help the UK meet its energy challenge. Only if consumers buy into and engage with those policies can they meet their objectives. Simplicity of information, greater understanding of the benefits of taking action and possible 'nudged' behavioural change can help bring this about. However, trust and engagement derive from personal experience, and it is clear that all actors with an interest in the energy sector must listen to customers and put them at the heart of this debate.

How much importance do we place on energy?

There is no doubt that the UK public recognises its dependence on energy for the lifestyle it currently enjoys but this report also finds that the public expects its dependency to grow. Respondents to this survey expect energy to become even

more important to the way they live (85% agree) and a bigger burden on household budgets with two thirds (68%) expecting their own energy costs to increase significantly in the future, regardless of whether or not actual usage increases.

Figure 1. Public sees itself as energy dependent but also very concerned about costs



Base: nationally representative sample of 2,400 UK adults, interviewed online 12th-17th September 2014

“ So many areas of modern life demand energy. In my case, this includes access to my building. ”

Male, London, aged 26

Despite this, and recent media coverage of concerns over security of supply and the possible impacts of climate change, energy is not one of the top issues worrying the public. In recent years polling has tended to find that the economy (and its direct impact on the cost of living), health and immigration have been the big three of public concern, and the result of this poll concurs. Energy comes 11th in a list of 14 issues provided to respondents in our survey, showing that it is not something of day to day concern to modern Britons, and is some way behind the environment as a concern.

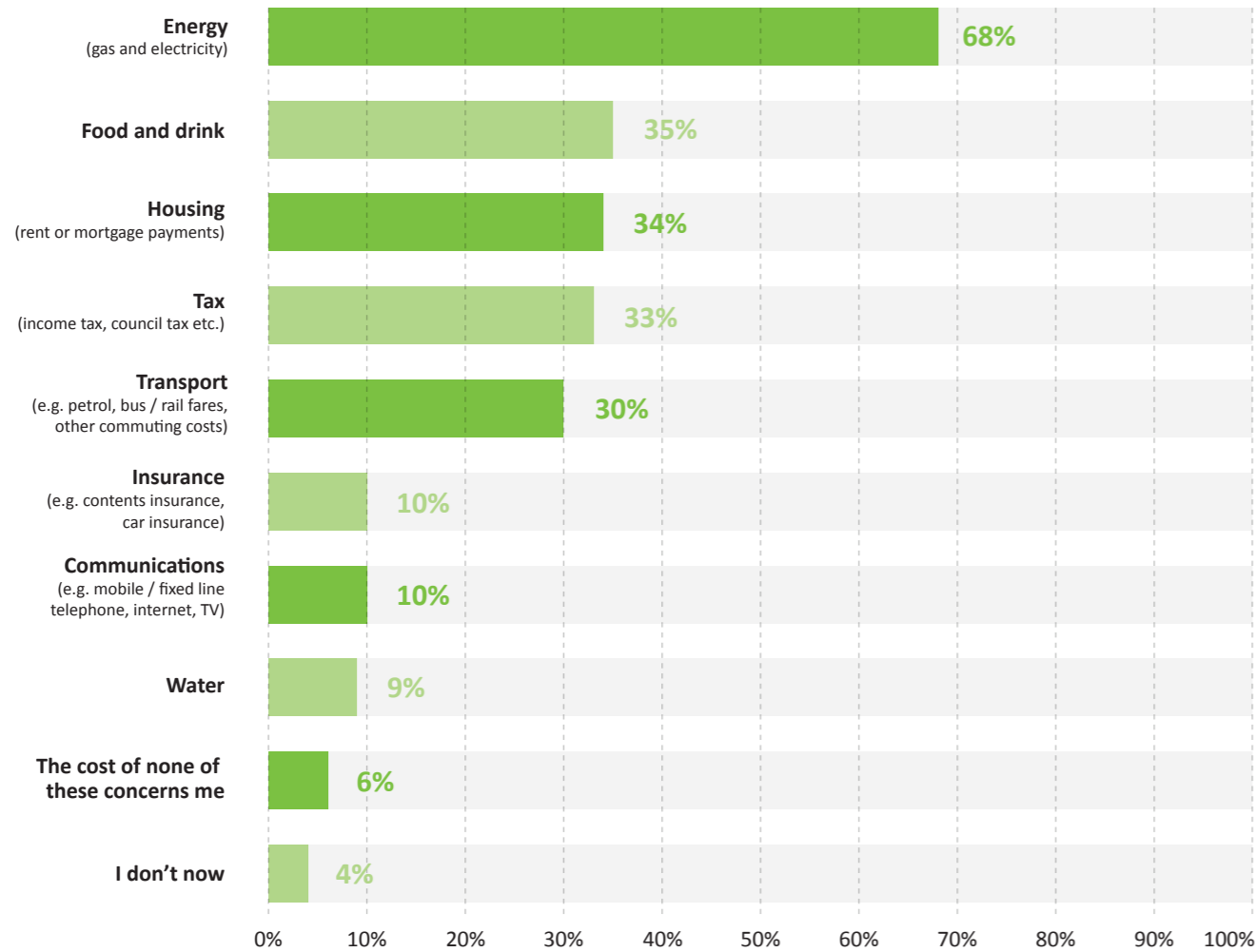
The situation changes though when the public is asked which elements of their household expenditure they are most concerned about. Energy prices top the list despite generally accounting for a smaller proportion of overall outgoings than other costs like housing. Two thirds (68%) pick energy, almost double the percentage of the next highest answer which is food (35%), followed by housing, tax and transport. There are also some interesting demographic splits in this data, with older people even more likely to select energy (77% amongst those aged 55+) than younger ones (52% amongst 18-39s).

“ I might not be able to use energy for leisure purposes in a few years if costs keep increasing. ”

Female, Scotland, aged 30

Figure 2. Energy is the top household expenditure concern

Thinking now about your own household expenditure, which of the following household costs are you most concerned about? *Please select one*



Base: nationally representative sample of 2,400 UK adults, interviewed online 12th-17th September 2014

When we look back at the question about the top issues worrying the public it therefore seems sensible to acknowledge that the high score for 'the cost of living' reflects some of the pressure that energy prices specifically are deemed to place on the public, as people's concerns around energy centre on the issue of affordability.

“What happens when you can't pay the bill? It's always a worry how much it costs.”

Female, North of England, aged 59

“10 yrs ago my monthly energy bill was £35, it is now £120. Scares me what it will be in another 10 yrs.”

Male, East of England, aged 46

But are customers really engaged with energy efficiency?

The increasing importance of energy is in part driven by the public's love of energy powered appliance and gadgets. A huge majority believe that having more of them makes their lives better (71%) while just 18% think this makes life more difficult and complicated, with the remaining 11% undecided.

However, public opinion on the impact of reducing energy consumption on individuals' lives is not clear cut. Just under half (47%) of those sampled believe that reducing consumption would save them money in return for only a small or no impact on the quality of their lives. A further quarter (27%) believe

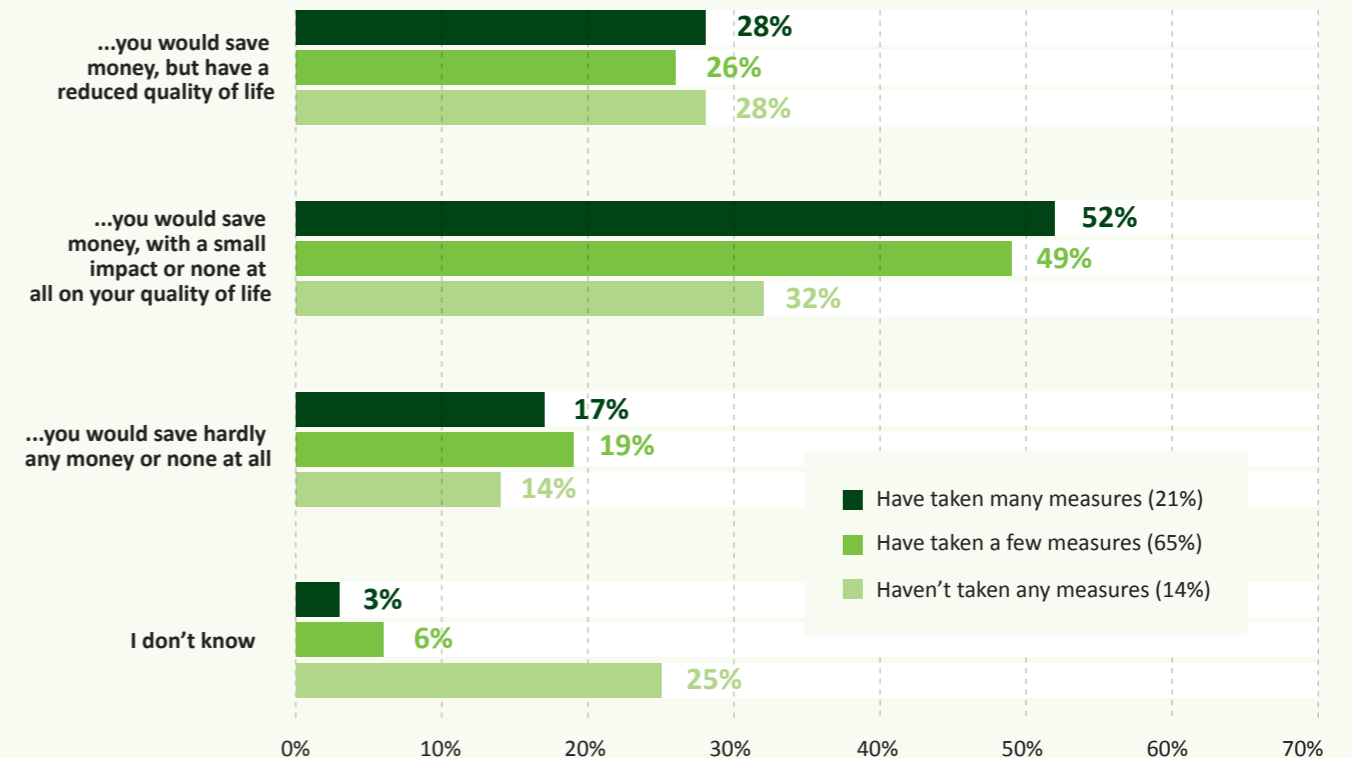
you would save money if you reduce usage but they worry that quality of life would be reduced. And while 8% don't know, the remaining one in five (18%) believe reducing consumption would save hardly any money or possibly none at all.

It is interesting to note that the proportion who think reducing consumption would not save money rises to a quarter (24%) of those aged over 55, but falls to only 5% among 18-24 year olds. By contrast, those fearing a reduced quality of life by cutting down on energy consumption is highest amongst the young, with 38% of 18-24s (vs 27% overall) saying this.

Figure 3. While 86% have taken steps to reduce consumption only around half think energy reduction will save money and not impact quality of life.

If you were to reduce your energy consumption, do you think *Please select one*

Think back over the last few years, have you taken any measures to reduce the amount of energy you consume?



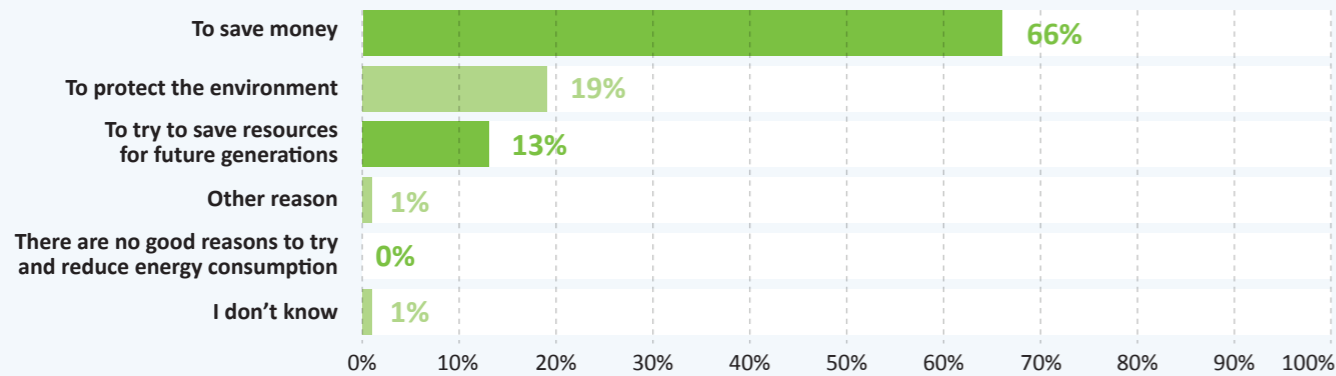
Base: nationally representative sample of 2,400 UK adults, interviewed online 12th-17th September 2014

Despite the fact that 45% feel that reducing energy consumption would either reduce their quality of life (27%) or would hardly save any money (18%), the survey does show that most (86%) have taken steps in recent years to cut their usage.

One in five (21%) say they have taken many measures while 65% say only a few, and 14% none at all. Disappointingly, those who have taken many measures are no more or less likely to agree that money can be saved or quality of life not impacted.

Figure 4. Saving money is seen as the strongest reason to reduce energy usage

Which ONE of the following do you think represents the best reason to reduce your own energy consumption?



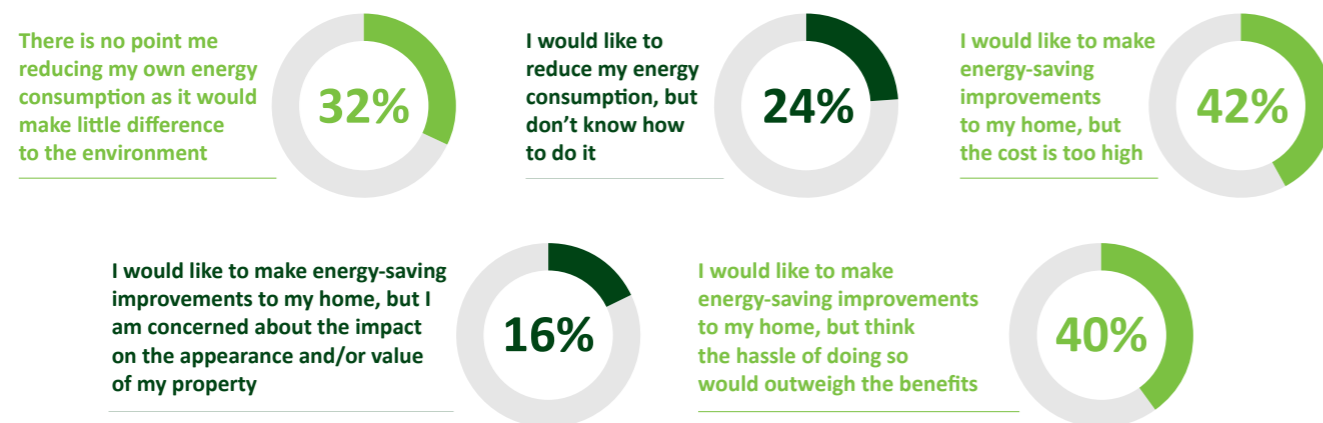
Base: nationally representative sample of 2,400 UK adults, interviewed online 12th-17th September 2014

The public very clearly believes that the best reason to reduce energy use is to save money. This reason is cited by 66%, versus just 19% who think the best reason is to protect the environment and even fewer (13%) who say it is to save resources for future generations. However, this link between an acknowledgement of the potential to save money by reducing energy consumption and actually taking action to do it seems weak. This is perhaps surprising when we consider just how worried the public is about the cost of their energy bills. Only one in five say they have taken many steps to reduce their energy usage; yet two in three believe doing so would save them money. Half (47%) believe they could reduce their energy usage without negatively impacting their quality of life, and 68% are most* concerned about household energy prices of all household costs. So why aren't people doing more to reduce their household energy consumption?

*"Most concerned" refers to a list of nine options from which respondents could choose up to three.

Figure 5. Amongst those who have not taken any steps to reduce consumption, cost and hassle are the largest barriers to action.

To what extent do you agree or disagree with each of the following?
Base: 14% who have not taken steps to reduce energy consumption



Base: 325, from a nationally representative sample of 2,400 UK adults, interviewed online 12th-17th September 2014

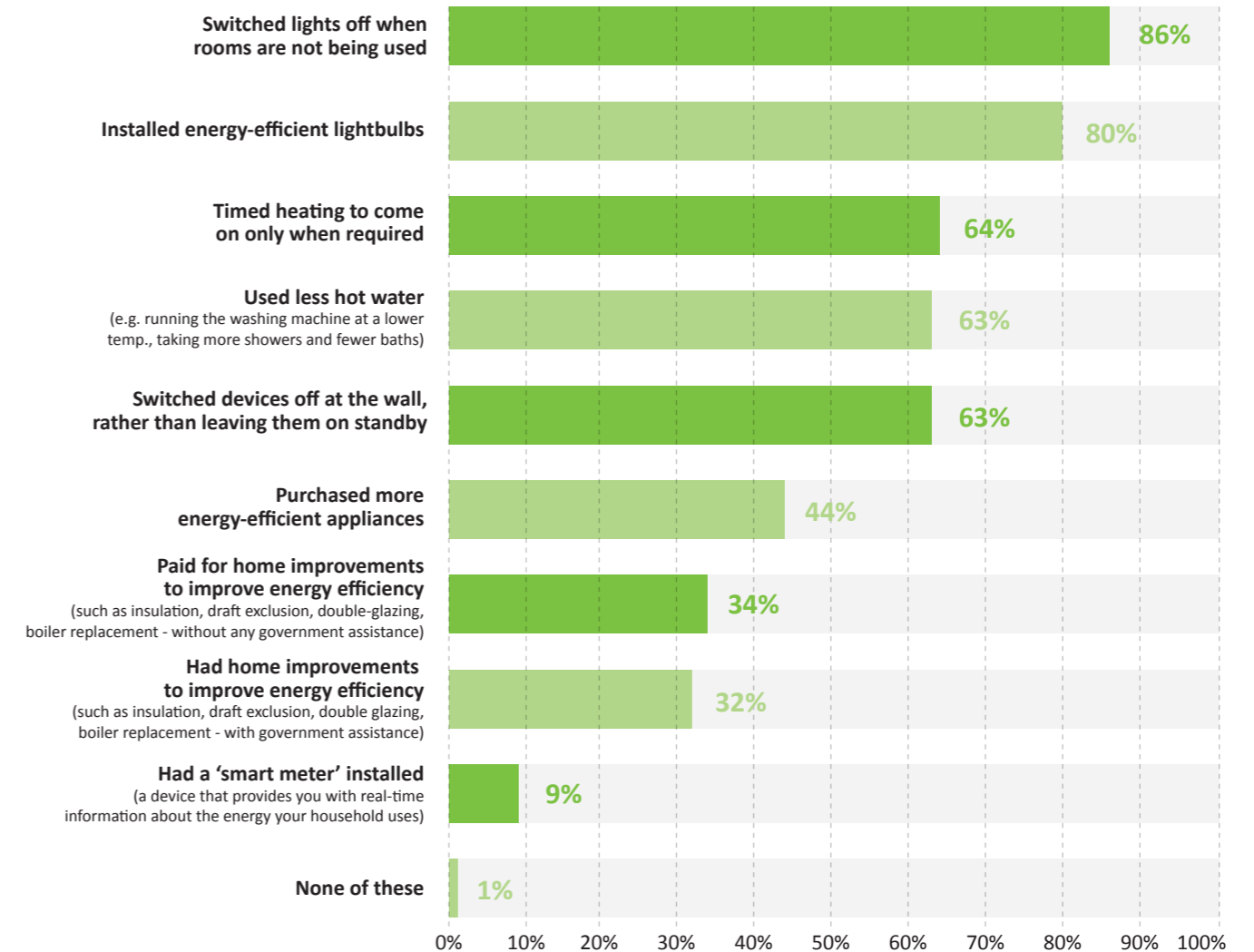
We can look at what actions people have actually taken to reduce consumption and we find the most popular actions tend to be those that are easiest to do. Top of the list of nine actions given to the 86% of respondents who have taken some actions is "switching lights off when rooms are not being used" at 86%, followed by "installed energy-efficient lightbulbs" at 80%. Three more actions then come in next with just under two thirds citing each, firstly "timed heating to come on only when required"

(64%), then "switched devices off at the wall, rather than leaving them on standby" (63%), and also "used less hot water (e.g. running the washing machine at a lower temperature)" (63%). Of these top five answers only the installation of lightbulbs requires any cash outlay by the public, and even then many lightbulbs were given away to customers by energy suppliers and less efficient bulbs are no longer sold.

Figure 6. Most frequent steps taken to reduce energy usage are lifestyle changes rather than capital outlay

Which, if any, of the following actions have you taken to reduce your energy consumption? *tick all that apply*

Base: 86% who have taken money or a few energy reduction measures



Base: 2,075 from a nationally representative sample of 2,400 UK adults, interviewed online 12th-17th September 2014

“Energy costs are very high and when the household income is more or less a set amount I think it is important to cut down as soon as possible to save money and by doing that you are saving the environment as well.”

Female, Midlands, aged 60

By contrast, amongst this group that has taken some steps to reduce energy consumption (86%), actions that require expenditure are much less common, though 44% do say they have “purchased more energy-efficient appliances”. 51% have “paid for home improvements to improve energy efficiency” either with or without government assistance (34% without and 32% with, while 14% have done both). Amongst homeowners the percentage for improvements without government assistance and with assistance rise to 44% and 36% respectively.

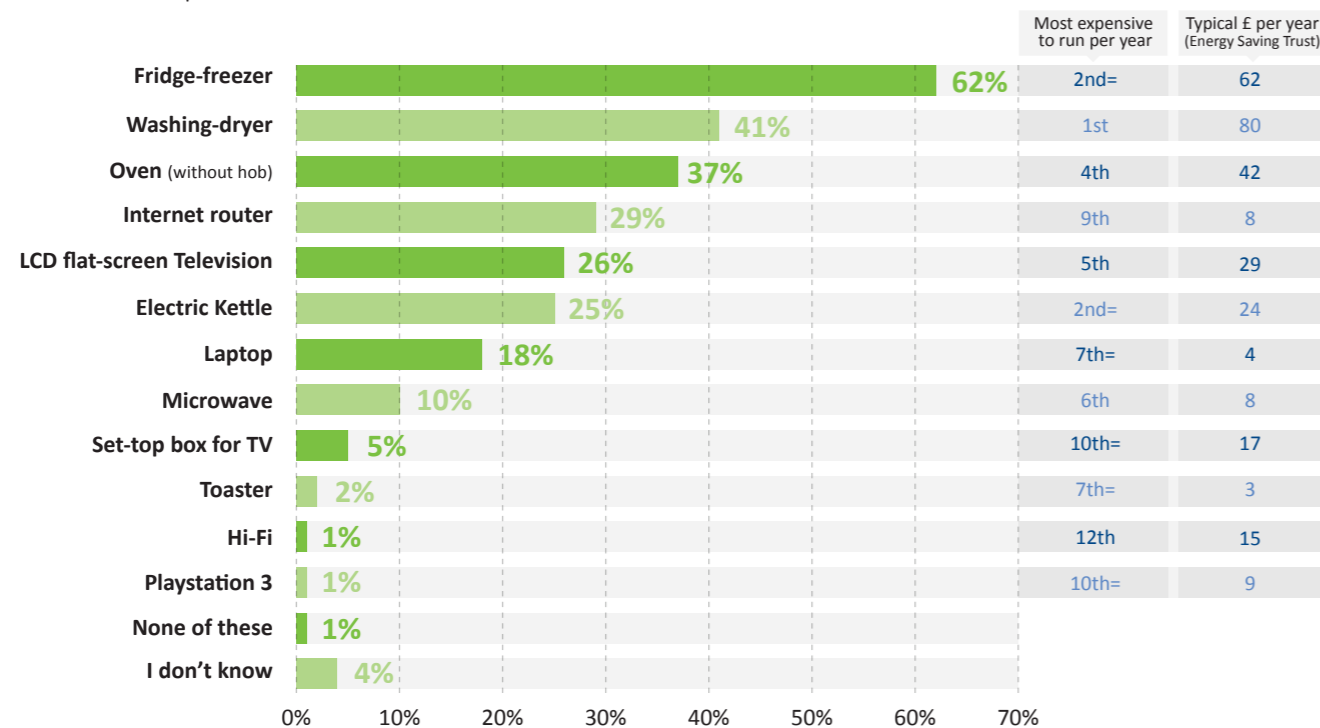
All survey respondents were asked to choose the one major home improvement that they perceive will provide the greatest savings when taking into account the cost of installation. While very few (12%) said they didn’t know the answer, there was no consensus on this question. A quarter (27%) go for double glazing, a similar proportion (24%) say loft insulation, one in five (21%) say a new boiler, and then 12% choose wall insulation and 5% draught exclusion. While most individuals were happy to choose something from the list provided, the lack of agreement suggests that there may be a knowledge gap here that would benefit from some education.

However, when it comes to the cost of running appliances, the public is evidently much better informed, again suggesting that understanding is strongest when it comes to actions that visibly reduce consumption and costs. They were given a list of 12 appliances and asked to pick the three that cost the most to run in a typical year. When compared to costs published by Energy Savings Trust, the survey respondents correctly selected a washer-dryer in first place, then fridge freezer and then oven (without hob), though electric kettle mistakenly made it into the top four.

Interestingly, when given the same list of appliances and asked which three they could least live without the order changes little except we see the internet router move into fourth place, passing the electric kettle and the flat screen TV. Amongst those aged 18-24 the internet router scores 38% which puts the router in second place behind fridge freezer (50%) but ahead of the oven (without hob) (37%) and the washer dryer (26%), LCD flat-screen TV (19%) and electric kettle at just 15%, while the laptop computer also increases to 33% compared to 18% amongst the total sample, further underlining the generational shift in how energy is being used.

Figure 7. We rely most on our white goods

And which of the following electrical devices (If you have them) do you think your family would find it most difficult to live without?
Please choose up to three



Base: nationally representative sample of 2,400 UK adults, interviewed online 12th-17th September 2014

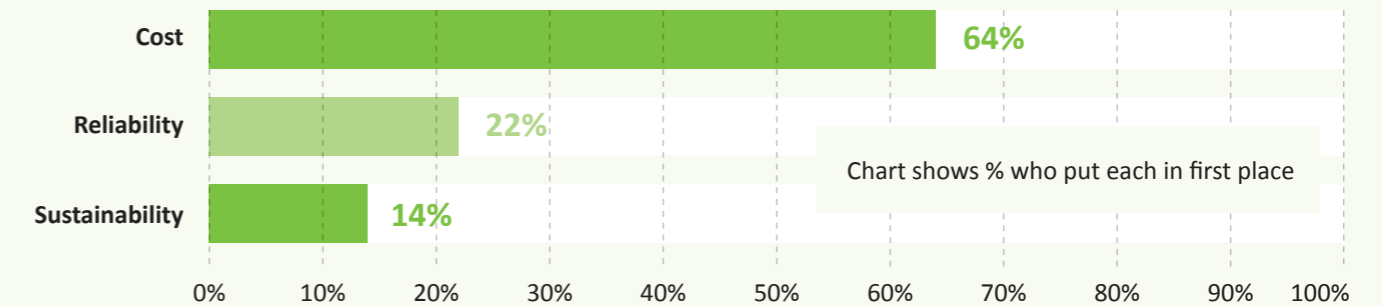
How do customers view the energy challenge and what it means for them?

Much has been written and debated about the energy ‘trilemma’ that Britain faces, based on the three competing issues of energy cost, security of supply, and sustainability. The survey asked respondents to rank these three issues in order of concern to them personally. Just under two thirds

(64%) put the cost of energy in first place, with a fifth (22%) selecting energy reliability in first, and the remaining 14% choosing sustainability which is defined here as generating energy from cleaner, low-carbon sources.

Figure 8. Majority put cost in first place above reliability and sustainability

Rank the following in order of concern to you personally: the cost of energy (i.e. being able to afford it), the reliability of energy (i.e. having a reliable, uninterrupted supply of energy available whenever you need it), The sustainability of energy (i.e. generating energy from cleaner, low-carbon sources)



Base: nationally representative sample of 2,400 UK adults, interviewed online 12th-17th September 2014

“The cost of energy is rising faster than our income so the proportion of our income paying for energy is growing faster than we can afford it. I can’t afford to worry about the other things ahead of the cost.”

Female, South of England, aged 52

“Because if it gets too expensive I will not be able to run as many things, whereas the sustainability and reliability seem less impactful on me in the short-term.”

Female, Midlands, aged 37

“I remember the 70’s and the inconvenience the powers cuts caused to business and families.”

Male, South of England, aged 65

“I am having to manage on a relatively low income. Otherwise, sustainability would be most important.”

Female, Scotland, aged 33

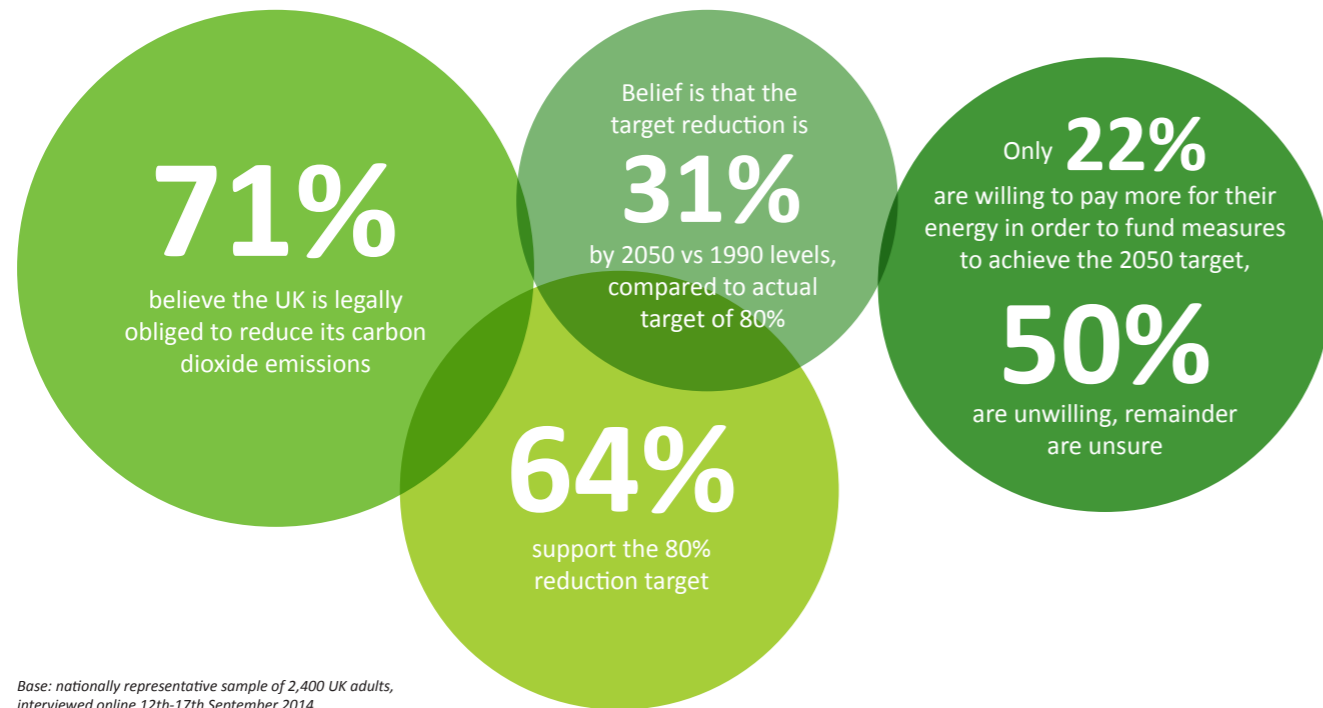
These results mirror findings from YouGov's energy report earlier this year. The personal and immediate nature of the cost of energy trumps worries about supply or sustainability for the majority of people.

One other point that adds some context here is that over two thirds (71%) claim they are aware that the UK is legally required to reduce its carbon emissions. Perhaps this high level of awareness that change is being driven at a macro level is partly responsible for reduced personal concern about energy

sustainability in the previous question. However knowledge of the scale of the reduction target is low. 43% couldn't provide a guess, while those who did answer the question average out at 31%, versus the actual target of 80% reduction by 2050 compared to 1990 levels.

“ Britain suffers green taxes but China and India pollute more... unfair. ”
Male, South of England, aged 65

Figure 9. Carbon dioxide targets are not well known but are supported, however there is no appetite to fund reduction measures



“ Curbing energy usage is important but it seems a bit of joke when you compare the energy usage of Europeans with countries like the US. ”
Female, Midlands, aged 49

The 80% reduction target has good support with 64% of respondents saying they either strongly or moderately support it while just 13% oppose it. And unsurprisingly perhaps 89% of those who selected the Environment as one of their top three worries also support the target. However, the survey reveals that this theoretical support does not necessarily translate into a willingness to take personal action. Just half (51%) claim they are prepared to use less energy in order to help the UK reach its target, regardless of what other people do.

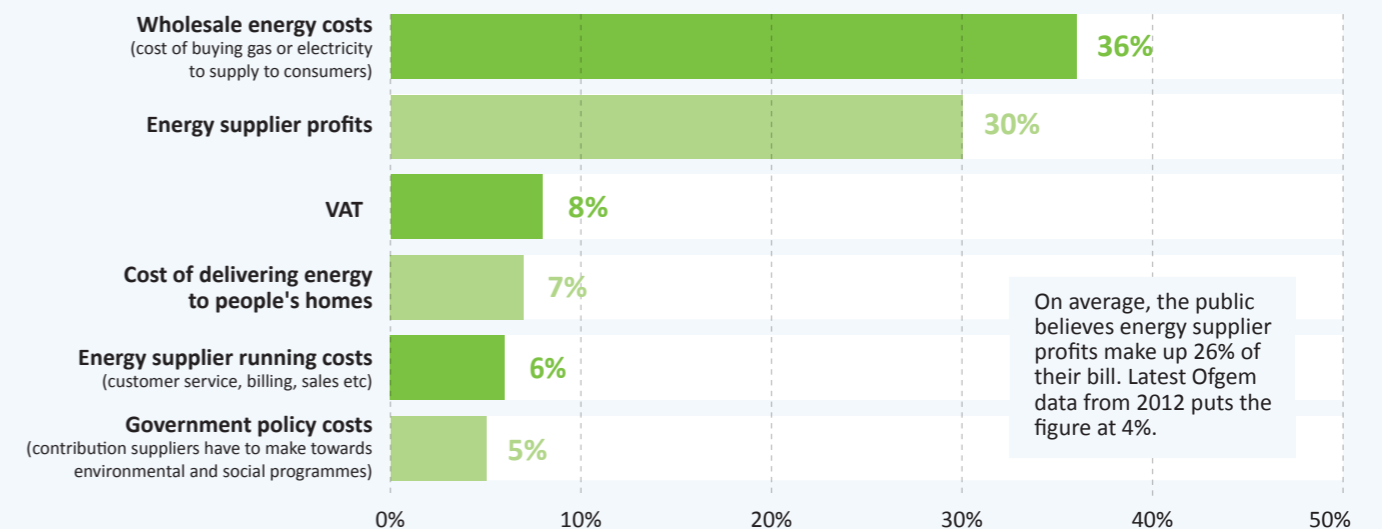
This figure is perhaps surprisingly not contingent on knowing others will do the same; especially given the understanding of some that the UK is a much lower contributor to global carbon emissions than countries such as the United States and China. Support collapses to just 22% when asked about willingness to pay more for energy in order to fund carbon-saving measures, such as home improvements, infrastructure investment, or installing smart meters.

Do customers understand what drives their energy costs?

The survey looked at customer understanding of the costs that make up their energy bill. Having established that cost is customers' most important priority, and that most people expect their energy costs to increase significantly in the coming years, the idea of the exercise was to probe public perceptions on the main drivers behind this.

Figure 10. 30% think energy supplier profits are the largest part of their energy bill

Which of the following do you think make up the biggest proportion of a typical bill, and which the smallest?
(Chart shows percentage who think each element is the largest of all)



Survey respondents ranked the six component parts of their bill from largest to smallest cost contributor, and we found that just a third (36%) correctly put wholesale energy costs in first place. The next largest perceived cost on the bill was energy supplier profits which 30% put in first place. The remaining four elements of VAT, government policy costs, energy supplier running costs, and cost of delivery to people's homes were each selected in first place by less than 10% of the sample.

When asked directly what proportion of the bill they believe goes to energy supplier profits, the average score is 26%. According to regulatory accounts published by Ofgem, the reality is very different with the net margin for the largest suppliers at around 4% (Source: Ofgem, November 2013). Only 24% of those surveyed believed that suppliers make a profit margin of 10% or less. This perception goes right across the public in terms of age, gender, social grade and area of the country.

“ I wish energy companies would stop claiming it's not their fault while posting record profits. ”
Male, London, aged 55

One change which would both reduce energy bills and possibly increase simplicity, transparency and fairness, is to remove the element which covers government programmes. Currently, when asked earlier in the survey, 39% of people are unaware that they pay through their bill for government policies designed to reduce UK carbon emissions (with 13% confident they don't, and the remaining 26% unsure).

When it comes to deciding whether to keep these payments on their bills rather than paying for them instead through means-tested taxation, just 39% are in favour.

Enabling customers to make the most of their energy

Earlier questions in the report identified possible gaps in consumer understanding around energy costs which may present opportunities to increase engagement by improving awareness. Respondents were then asked directly whether they agreed or disagreed that they “currently receive information about my energy usage in a way that is easy to understand and use”. Only a third (34%) agree that they do while another third (33%) disagree. There is greater agreement that “if I had better, more understandable information about the energy I use it would help me to use less”, with 47% agreeing and only 17% disagreeing. Interestingly, agreement is higher amongst those who support the UK’s carbon reduction target, at 53%, compared with 32% of those who oppose the target, suggesting that for many reducing usage isn’t solely about saving money.

“My energy co gives me endless amounts of info. I just don’t have the time or inclination to read it.”

Female, London, aged 65

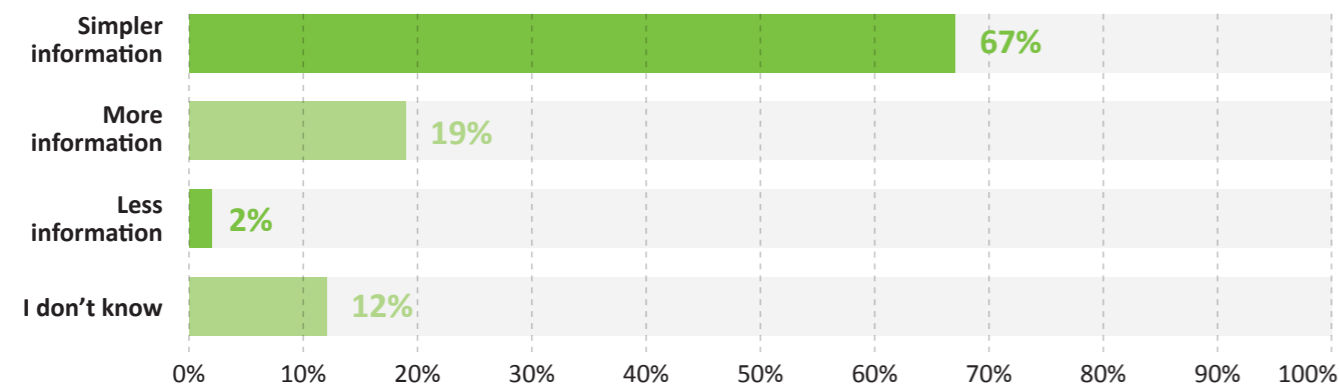
Just 41% say “I understand my energy bills”. But the level of understanding falls to 31% when asked if “I understand the information on my bill enough to know whether the amount I am paying is fair”. Both questions seem to show limited confidence with the information on bills. It seems simpler yet more informative bills could perhaps help to build that confidence. Given a choice of ways to improve their energy bill, a significant majority (67%) would prefer it to contain simpler information, while 19% want more information and just 2% say less information (while 12% don’t know) in this context.

“Let’s make it easy for everyone to understand their bills by actually using English not power speak.”

Male, Wales, aged 67

Figure 11. Customers want simpler information on their bills

Thinking about your energy bill, which of the following changes would help you to most understand your energy use and bill better?
Choose one option only



Base: nationally representative sample of 2,400 UK adults, interviewed online 12th-17th September 2014

“Make gas and electricity tariffs understandable to the average consumer to enable them to make an informed choice of supplier and / or tariff.”

Female, North of England, aged 74

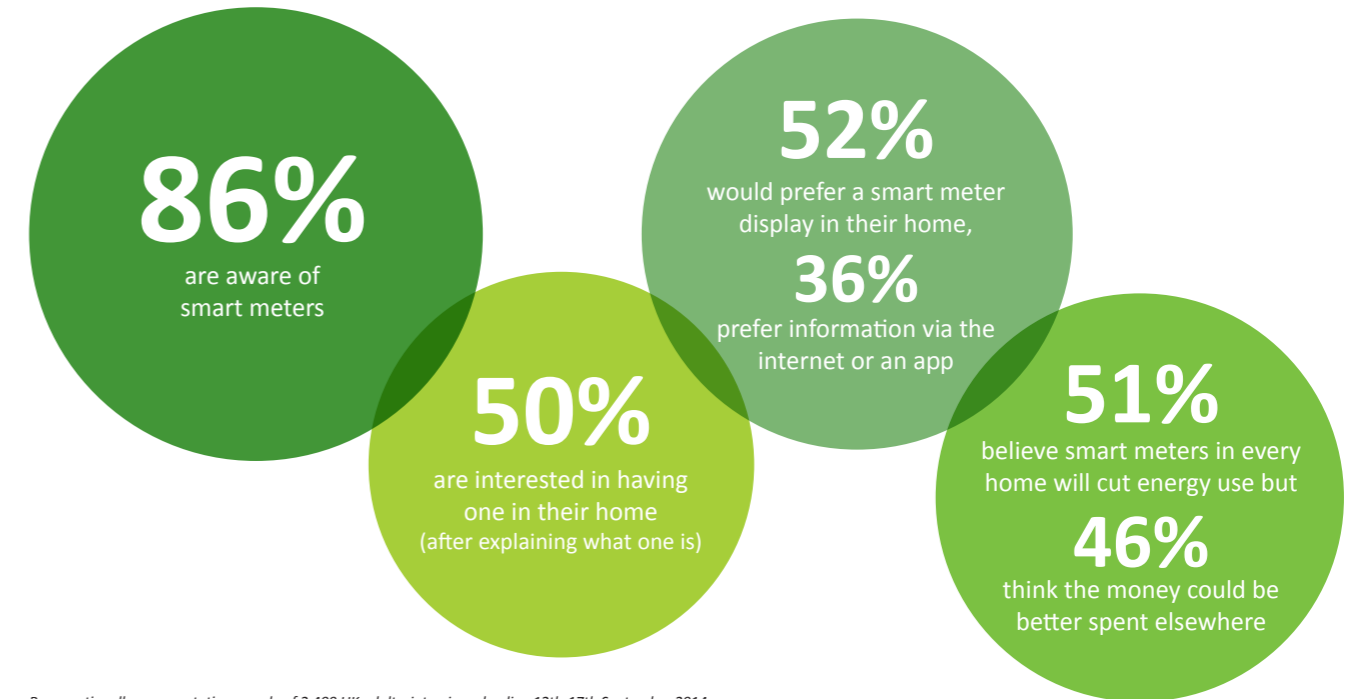
“Bills, in their attempt to make the bills easier to understand and the ‘tariffs’ and the special deals it’s all totally alienating, pages of obfuscation. My husband has a Phd and doesn’t understand them.”

Female, North of England, aged 74

A key component of energy policy to tackle this challenge is the national roll-out of smart meters, which will help improve the accuracy of billing and, it is hoped, equip customers with the information they need to get the most from the energy they use. Positively, the survey shows that awareness of smart meters is high, with 86% saying they had heard of them before they took the survey, with only younger respondents showing significantly lower levels of awareness (66% of 18-24s). However, despite the ambition to install a smart meter in every single home by 2020, only half of respondents are interested “in having a smart meter in your home”; 24% are not and 26% are unsure either way. The proportion saying yes tails off amongst older respondents, falling to just 42% of those 55+.

The same proportion (51%) agree with the statement “It is a good idea to have a smart meter in every home, as this will help reduce our use of energy in the long run” while 19% disagree. Even amongst the one in seven respondents who earlier had put sustainability of energy as their number one priority, ahead of lowering prices and supply reliability, agreement only rises to 60%. Almost half (46%) believe the cost of rolling out smart meters to every home by 2020 would be better spent elsewhere, while just 22% disagree.

Figure 12. Smart meters are generally but not wholeheartedly supported



Base: nationally representative sample of 2,400 UK adults, interviewed online 12th-17th September 2014

“Prices are too pricey and bills are too complex. The onus should be on the supplier to simplify, instead of introducing technology such as smart meters for us to decipher how much energy we use.”

Male, London, aged 18

The survey then asked those who would be willing to have a smart meter in their home as well as those who say they are unsure, how they would prefer to get information from it about their energy use. Only half (52%) choose a display in the home (IHD); 18% would prefer access via the internet, and another 18% choose an app on their smartphone or tablet. Encouragingly, only 1% say they don’t care as they wouldn’t use the information anyway, while 11% say ‘don’t know’. Perhaps unsurprisingly, the younger respondents are keener for an app than other ages, with 30% of 25-34s and 22% of 35-44s expressing a preference for it. Although provision of an IHD is currently mandatory for every home in the roll-out, the survey highlights that almost half of respondents may in fact prefer to access the information in other ways.

So, how do we broaden and deepen engagement with energy?

Energy is growing in importance as it is perceived to improve the quality of our lives, but despite expecting the cost to increase significantly, customers are struggling to get beyond the issue of price which is preventing them from engaging more with wider energy issues at a national or even personal level. The result is that many consumers are not getting the most from the energy they buy.

Though people have taken some steps to try to reduce their energy use, either to save costs or to be more environmentally aware, there remain real opportunities for suppliers to drive greater customer engagement and action in simple, practical ways, such as:

- helping more customers to make bigger energy efficiency improvements to their homes in a way which makes it more affordable and does not add to energy bills;
- raising awareness of the UK's energy challenge by making it more engaging while convincing customers that they can both help and benefit at the same time by lowering their energy use without necessarily reducing their quality of life; and
- empowering customers by helping them understand and then act on their energy usage by giving them simpler information in a way that suits them.

It is clear that no single organisation can effect this change alone. It requires the collaboration and shared focus of all actors with an interest in energy to communicate and act in a way that puts the customer at the heart of the energy debate.



The Company

SSE plc is one of the UK's leading energy companies, involved in the generation, distribution and supply of electricity and in the extraction, storage, distribution and supply of gas. Its core purpose is to provide the energy people need in a reliable and sustainable way. It supplies energy to around 9 million energy and home services customers throughout Great Britain and Ireland through its retail brands SSE Southern Electric, SSE SWALEC, SSE Scottish Hydro, SSE Airtricity and SSE Atlantic, which have been ranked number one for customer service* eight years in a row.

SSE provides over 19,000 jobs in Great Britain and Ireland and in September 2013 became the then largest-ever accredited Living Wage employer in the UK. An independent study carried out by PwC found that SSE made a contribution of over £9 billion to the UK economy in 2012/13, comparable in scale to the one-off economic boost of £9.9 billion delivered by the London Olympic Games in 2012. In March 2014, responding to customer concerns about rising energy prices, SSE announced that it would not increase standard household energy prices before 2016 at the earliest – the longest ever unconditional energy price freeze.

*According to the uSwitch.com Customer Satisfaction Survey



The Company

Founded in London in 2000, YouGov is considered the pioneer of online market research. Now with offices throughout the UK, the United States, Europe, the Middle East, Africa and Asia, YouGov was recently named one of the world's top 25 research companies by the respected American Marketing Association Top 25 Report.

What The World Thinks

From the very beginning, we have been driven by one simple idea: *The more people participate in the decisions made by the institutions that serve them, the better those decisions will be.* We are constantly engaged in developing new technologies and methodologies to enable collaborative decision-making.

At the heart of the company is a global online community of some 3 million respondents and thousands of political, cultural and commercial organisations, engaged in a continuous conversation about their beliefs, their behaviours and their brands. In the twelve months

leading up to 31 July 2013, members of the YouGov panel completed more than 17 million surveys (an increase of more than 13%). The result: YouGov's proven, published record of uniquely accurate data and actionable insights.

Products and Services

YouGov's suite of proprietary data products includes: BrandIndex, the daily brand perception tracker; YouGov Omnibus, the fastest, most cost effective way to obtain answers from both national and selected samples; SoMA, the social media audience analysis tool, and YouGov Profiles, a new tool for media planning, segmentation and forecasting.

The company publishes a number of syndicated reports, such as the annual Global Survey of Wealth and Affluence and the Household Economic Activity Tracker published in the UK, US and China, which provide comprehensive market intelligence on a range of industry sectors. YouGov's custom research specialists also conduct a full spectrum of quantitative and qualitative research tailored to meet our clients' specific needs.



Contact details

YouGov Email: info@yougov.com Website: yougov.com Twitter: [@YouGov](https://twitter.com/YouGov)

SSE Email: media@sse.com Website: sse.co.uk Twitter: [@SSE](https://twitter.com/SSE)

All figures, unless otherwise stated, are from YouGov Plc.

Total sample size was 2,400 UK adults. Fieldwork was undertaken between 12-17th September. The survey was carried out online. The figures have been weighted and are representative of the UK.