

2020

SMART METER SURVEY

MANX UTILITIES
TOPLINE SUMMARY REPORT



Island Global Research

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This topline summary report presents findings from a survey for Manx Utilities completed by residents in the Isle of Man in September 2020.

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About Island Global Research

Island Global Research is a market research and consultancy company with experience in both quantitative and qualitative research methods. We regularly conduct market research for clients in the Crown Dependencies.

Island Global Research is part of the BWCI Group, and a member of Abelica Global.

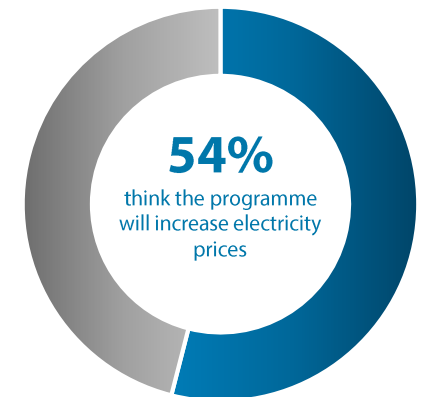
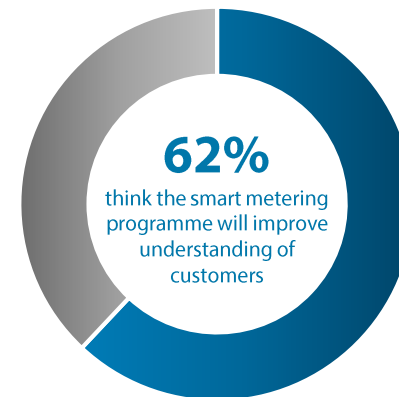
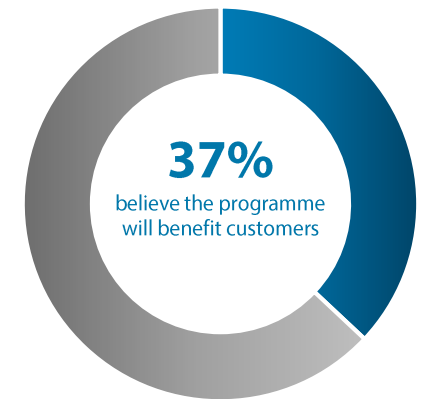
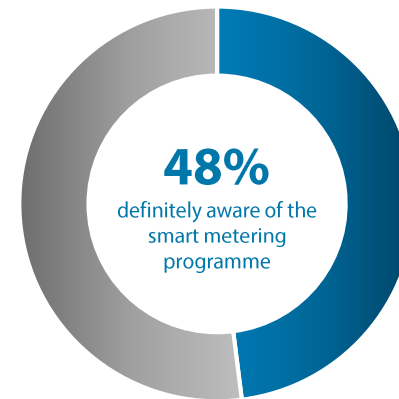
KEY FINDINGS

The survey was completed by 1090 residents across the Isle of Man in September 2020.

THE SMART METERING PROGRAMME

- Around half of the population were aware of the smart metering programme
- Fewer than 1 in 10 feel they know a lot about it.
- 12-13% agreed or strongly agreed that the smart metering programme will be delivered on time and/or to budget.
- 37% of people believe the smart metering programme will benefit customers.
- 62% think the smart metering programme will improve understanding of customers and their electricity consumption habits, and this was the most commonly understood benefit.
- 37% think the smart metering programme will decrease energy use and therefore emissions.
- 54% think the smart metering programme will increase the price of electricity.
- Similarly, Increased awareness of electricity use was the most commonly mentioned 'other' benefit, but there was doubt amongst some respondents as to whether this would actually lead to reductions in electricity use or bills. While the cost of implementing the programme, and that this might lead to increased electricity prices, was a common 'other' concern.
- Attitudes towards the programme are often mixed, and overall there is a fairly even split between those who are more positive and those who are more negative. Greater knowledge is associated with an increase in both positive and negative views.
- 56% are somewhat or very interested in the smart metering programme and its objectives. Those who already have a negative attitude about the programme are the least likely to be interested in it.

VIEWS OF ISLE OF MAN RESIDENTS



KEY FINDINGS

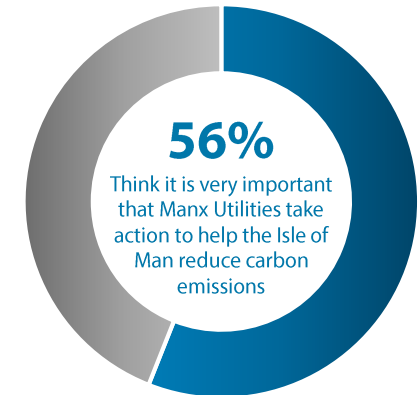
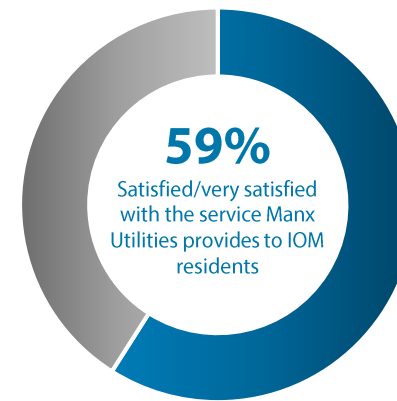
PUBLIC PERCEPTIONS & CUSTOMER EXPERIENCE

- 59% are satisfied or very satisfied with the service Manx Utilities provides to Isle of Man Residents.
- 52% feel positive about Manx Utilities
- Just over a quarter of people agree/strongly agree that it puts customers first and care about the environment.
- 70% rated Manx Utilities as good or very good for reliability.
- 72% were satisfied or very satisfied with the customer service they received last time they contacted Manx Utilities.
- Comments about the high cost of services were the most prevalent. There were also a fair number of positive comments about the service provided by all types of staff. Helpful, excellent, easy, reliable and professional are key words used to describe Manx Utilities. This was, however, balanced by a small number of negative experiences with regards to responsiveness and communication with customers.

THE ENVIRONMENT

- 71% agree or strongly agree that they are conscious of their carbon footprint.
- 86% of those who have a positive attitude towards the smart metering programme are conscious of their carbon footprint, while 62% of those who have a negative attitude agreed/strongly agreed to this statement.
- 56% of people think that it is very important that Manx Utilities take action to help the IOM reduce carbon emissions.
- 28% are very concerned about the environmental impact of the energy they use at home.

VIEWS OF ISLE OF MAN RESIDENTS



METHODOLOGY

Introduction and Approach

Island Global Research conducted a survey of Isle of Man residents on behalf of Manx Utilities, to understand:

- **Views on smart meters,**
- **Satisfaction with the service currently provided to customers.**

Manx Utilities are undertaking a programme to install smart meters in homes and businesses across the Isle of Man. The feedback will help the organisation to successfully roll out the smart metering programme. It will also enable it to identify how customer experience could be improved.

The survey was conducted online, and comprised of up to 42 questions on perceptions of Manx Utilities and customer experience, views about smart meters, the environment, plus profiling questions. Responses were collected between 7 and 27 September 2020. We contacted our market research panel, inviting them to participate in the survey. We also promoted the survey using social media.

The survey had a tremendous response and was completed by 1090 residents in the Isle of Man.

Profile of Respondents

The survey was completed by a wide range of the people. Survey weights to correct for age and gender differences between the sample and the population have been applied. The results presented are representative of the population of the Isle of Man and Manx Utility customers. See full report.

76% said their household receives a quarterly electricity bill (billed customers), and 21% are from households that PAYG by topping up their account.

Responses for non-domestic electricity account holders and Manx Utilities staff can be found in the appendix.

The table shows the age and gender profile of the adult population living in the Isle of Man, and the profile of the sample who completed the survey. It also shows the profile of the sample after weights have been applied.

		Isle of Man Population	Survey	
		%	% of sample	% after survey weights
Age group				
	16-24	12%	1%	3%
	25-29	6%	3%	7%
	30-34	7%	4%	7%
	35-39	7%	7%	8%
	40-44	8%	9%	9%
	45-49	9%	10%	10%
	50-54	10%	12%	11%
	55-59	9%	16%	9%
	60-64	7%	11%	8%
	65-69	8%	10%	9%
	70-74	6%	10%	7%
	75+	11%	5%	11%
	Prefer not to say	-	1%	1%
Gender*				
	Female	51%	46%	49%
	Male	49%	53%	49%
	Prefer to self-describe	*	<1%	<1%
	Prefer not to say	-	1%	1%

See full report for further detail.

**All respondents live in households that receive electricity services from Manx Utilities as it is the only electricity provider on the island.*

SMART METERS

This section presents topline results for:

- Awareness and interest in the smart metering programme
- Delivering the smart metering programme and attitudes towards it
- Impact of the smart metering programme

In Summary:

Around half of the population were aware of the smart metering programme, but fewer than 1 in 10 feel they know a lot about it. This and the number of “don’t know”/“neutral” responses indicates a need for further communication about the project.

Currently, 62% think the smart metering programme will improve understanding of customers and their electricity consumption habits, but only 37% think this will translate into reduced energy use/emissions and that the programme will benefit customers. Conversely, 54% think the smart metering programme will increase electricity prices. The open text comments also reflect these views.

Attitudes towards the programme are often mixed, and greater knowledge is associated with an increase in both positive and negative views. PAYG customers tend to have a more positive outlook than others, including being slightly more likely to say it will improve ‘quality of life’. Online meter top up was suggested as a potential benefit and may be contributing to this view.

It may be difficult to engage those who currently have a negative attitude about the programme as they are the least likely to be interested in it.

AWARENESS OF AND INTEREST IN THE SMART METERING PROGRAMME

Around half of the population were aware of the smart metering programme, but fewer than 1 in 10 feel they know a lot about it.

56% are somewhat or very interested in the smart metering programme and its objectives.

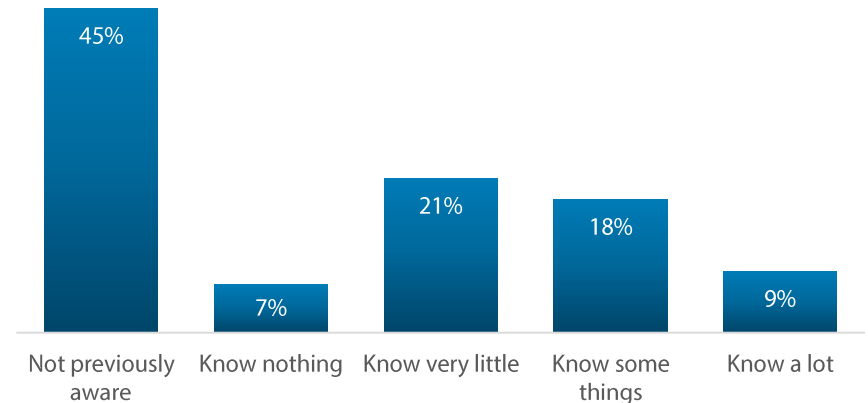
Respondents were asked, "Prior to this survey, were you aware that Manx Utilities was undertaking a programme to install smart meters in the Isle of Man?" Those with definite or possible awareness were then asked how much they knew about the programme.

Prior to the survey being launched:

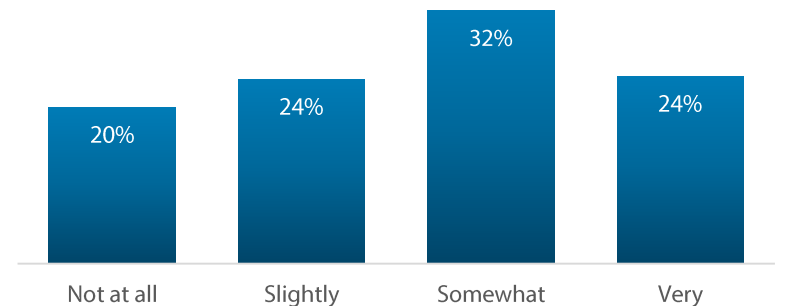
- 45% of people had not previously been aware of the programme,
- 28% had some level of awareness but felt they knew nothing or very little about it,
- 27% felt they had a higher level of knowledge about the programme. This includes 9% who said they knew a lot, for example they understood the reasons for doing it.

Respondents were later asked how much interest they had in the smart metering programme. We received a wide spectrum of responses. Just over half are somewhat or very interested.

Awareness and Knowledge of the Smart Metering Programme



How interested are you in the smart metering programme and its objectives?



DELIVERING THE SMART METERING PROGRAMME AND ATTITUDES TOWARDS IT

12-13% agree/strongly agree that the smart metering programme will be delivered on time and/or to budget.

37% of people agree/strongly agree the programme will benefit customers.

Respondents were asked about their views on delivery of the smart metering programme.

12- 13% agreed/strongly agreed it will be delivered on time and/or to budget

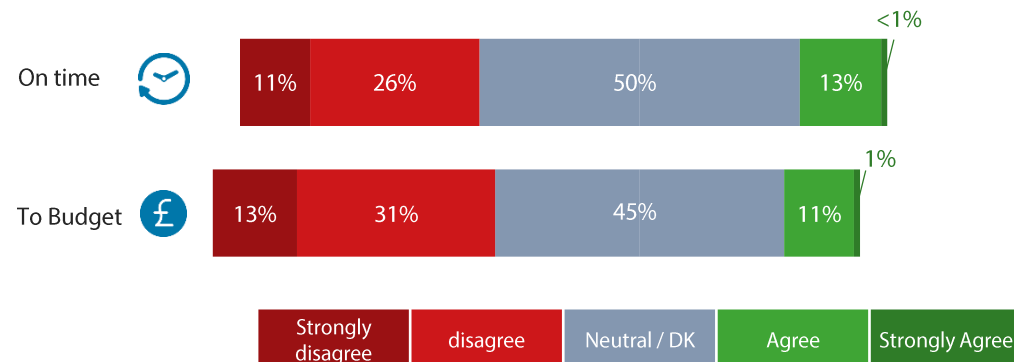
When asked about their attitudes towards it:

- 44% believe the programme will lead to one or both of the positive outcomes, including 35% who agreed/strongly agreed the programme will enable positive service changes and 37% who agreed/strongly agreed it will benefit customers.
- 38% agreed/strongly agreed it may result in disadvantages or negative changes.

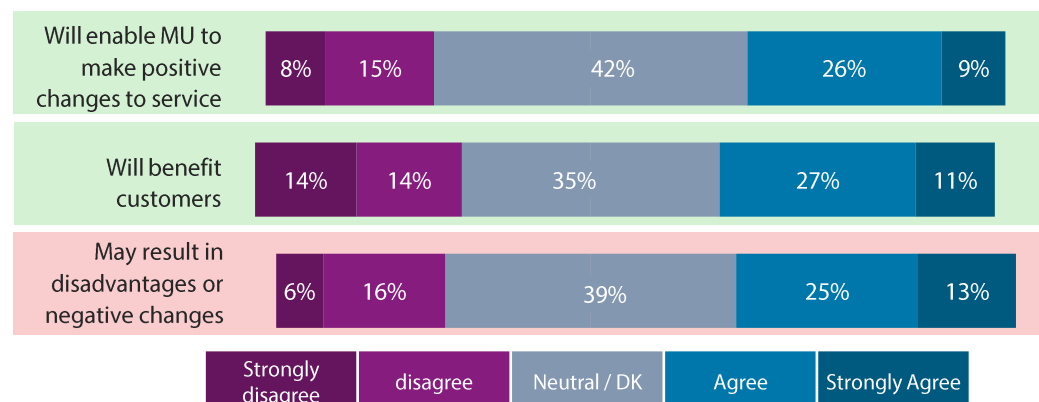
Overall attitudes to the programme have been determined based on the answers to each of the three statements to the right:

- 16% of people have positive attitudes towards all three aspects and 17% have completely negative attitudes.
- 48% hold a mix of both positive and negative perspectives. Of these, it is estimated that there is a fairly even split between those with more positive and those with more negative attitudes.

I believe that Manx Utilities will deliver the programme ...



I believe the Smart Metering Programme...



IMPACTS OF THE SMART METERING PROGRAMME

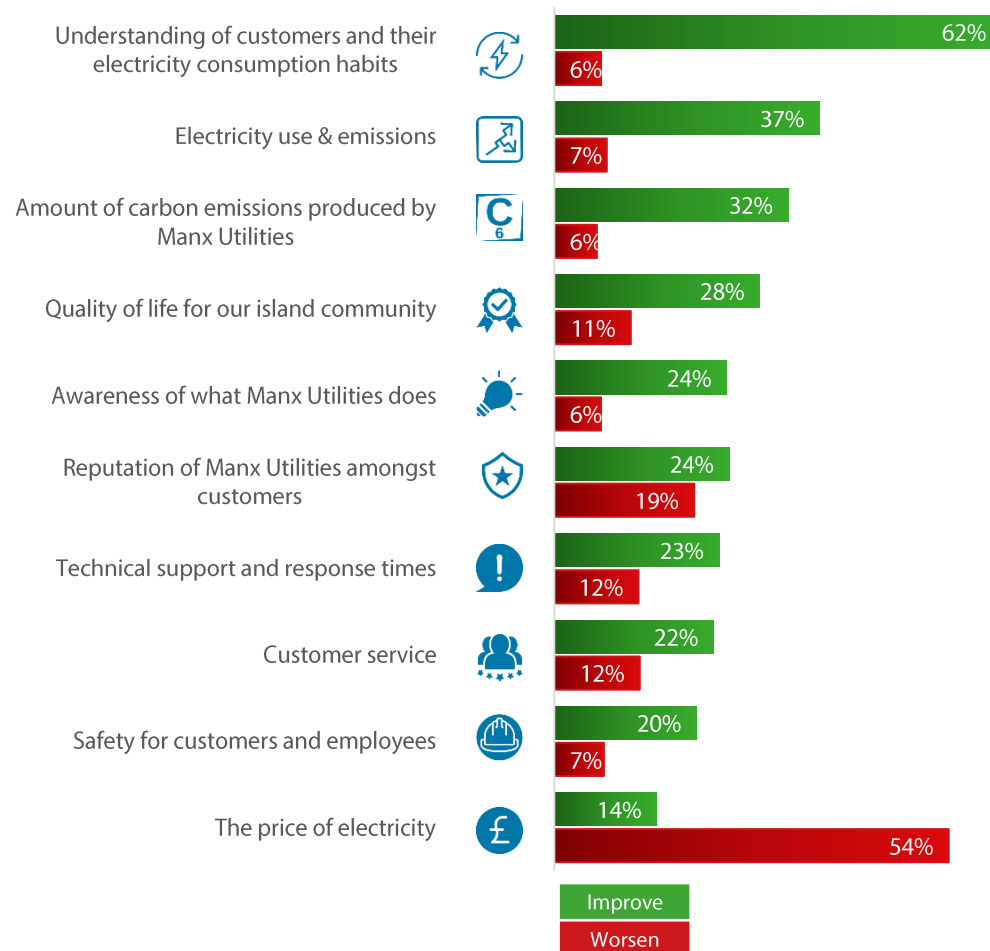
62% think the smart metering programme will improve understanding of customers and their electricity consumption habits, but only 37% think it will reduce energy use/emissions.

54% think the smart metering programme will increase prices.

Respondents were asked how they think the smart metering programme will change each of the following aspects, based on what they know at the moment:

- 62% of people think the programme will improve understanding of customers and 37% think the smart metering programme will decrease energy use and therefore improve emissions.
- Less than a third believe the programme will lead to improvement in each of the other areas, and fewer than 1 in 10 think any will be 'much improved'.
- 54% think the smart metering programme will increase prices and 19% that the reputation of Manx Utilities could get worse.
- 6-12% of people believe each of the other aspects will get worse.
- Around half (40-56%) think there will be no change to most aspects and 15-20% don't know how the programme will impact each aspect.

How do you think the smart metering programme will change:



MANX UTILITIES: PUBLIC PERCEPTIONS & CUSTOMER EXPERIENCE

This section considers topline results for Manx Utilities as a whole, including electricity, water and sewerage services:

- Perceptions of Manx Utilities, including satisfaction with the service to residents
- Customer experience

In Summary

Around half of people feel positive towards Manx Utilities. The majority believe it provides a reliable and satisfactory service to residents.

This generally is supported by good customer service upon interaction, but more could be done to make customers feel like they are being put first and that the organisation cares about the environment.

Cost is a poorly rated area that is often difficult to address. In this case it is more likely to affect perceptions of the service Manx Utilities provides to the island, than directly impact satisfaction with customer service received.

PERCEPTIONS AND CUSTOMER EXPERIENCE

52% feel positive about Manx Utilities, but only around half of that agree it puts customers or the environment first.

72% were satisfied or very satisfied with the customer service they received last time they contacted Manx Utilities.

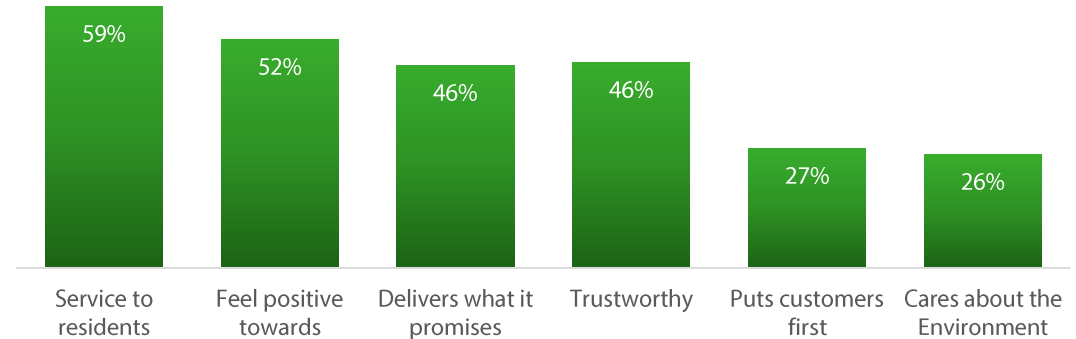
Respondents were asked about their satisfaction with the service Manx Utilities provides to island residents, and to what extent they agreed or disagreed with a selection of statements about the organisation.

- 59% are satisfied or very satisfied with the service Manx Utilities provides to Isle of Man Residents
- 52% agreed or strongly agreed they feel generally positive towards the organisation.
- 27% agreed or strongly agreed Manx Utilities puts customers first.

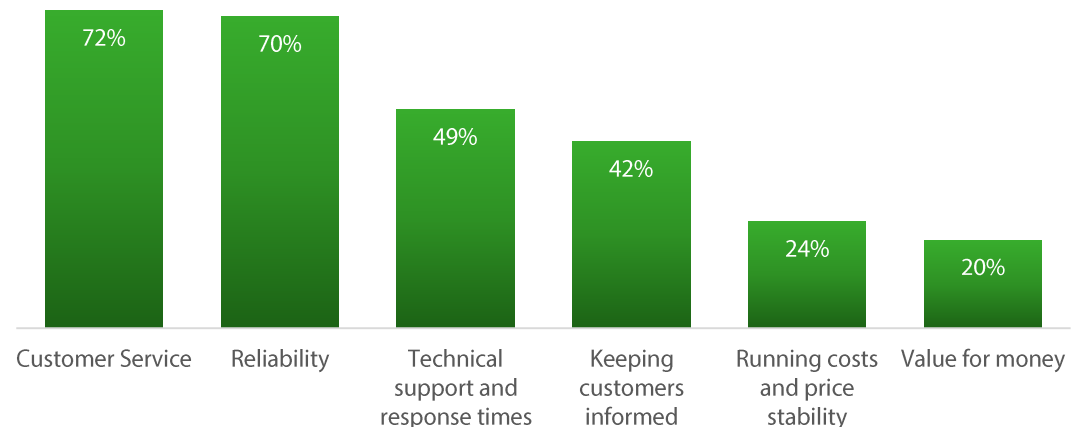
They were also asked their satisfaction with the customer service they received the last time they contacted Manx Utilities, and to rate a selection of other customer touchpoints.

- 72% were satisfied or very satisfied with the customer service
- 70% rated reliability as good or very good.

Public Perceptions of Manx Utilities: % rated highly



Customer Experience: % rated highly
Excluding don't know





THE ENVIRONMENT

The section presents results for:

- How conscious people are of their carbon footprint
- Importance of Manx Utilities taking action to help the Isle of Man reduce carbon emissions from electricity use
- Level of concerned about the environmental impact of the energy people use at home

In Summary

The majority of people indicate they are environmentally aware, with 71% saying they are conscious of their carbon footprint.

In line with this, there is support for Manx Utilities taking action to help the Isle of Man reduce its carbon emissions.

That being said, this perspective does not guarantee a positive view of the smart metering programme.

Overall people are more likely to emphasise the importance of the role of Manx Utilities than be very concerned about their personal energy use.

ENVIRONMENTAL CONCERN & RESPONSIBILITY

56% of people think that it is very important that Manx Utilities take action to help the Isle of Man reduce carbon emissions.

The majority of people indicate they are environmentally aware, with 71% agreeing or strongly agreeing that they are conscious of their carbon footprint:

- 23% strongly agreed and a further 48% agreed

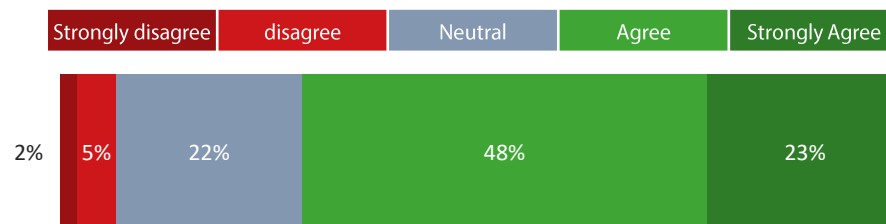
In line with this, there is support for Manx Utilities taking action to help the Isle of Man reduce its carbon emissions:

- 56% said it is very important Manx Utilities take action, and a further 20% said it is moderately important (76% total).

More than a quarter of people believe the environmental impact of the energy they use at home is a very concerning issue, although overall people are more likely to emphasise the importance of the role of Manx Utilities than be concerned about their personal energy use:

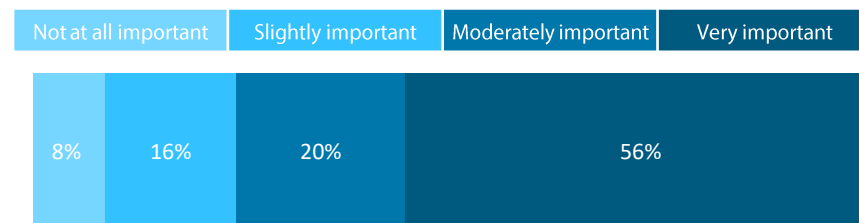
- 28% are very concerned about the environmental impact of the energy they use at home, while 35% are moderately concerned (63% total).

**Do you agree or disagree with the following statement:
I am conscious of my carbon footprint**



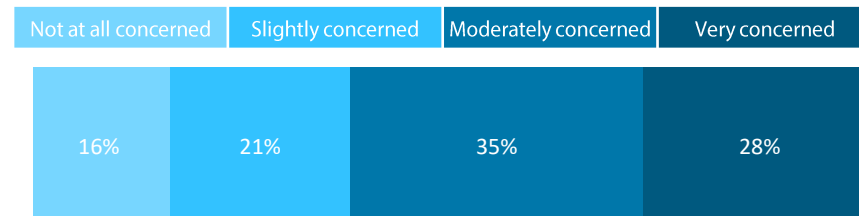
71% agree or strongly agree

Do you think it is important that Manx Utilities takes action to help the Isle of Man reduce carbon emissions from electricity use?



56% very important

How concerned are you about the environmental impact of the energy you use at home?



Excluding don't know

28% very important

IN SUMMARY

As anticipated, the findings indicate a need for further communication about the smart metering programme. Demonstrating how Smart Meters can benefit customers and the environment feeds into a wider communication challenge around the extent to which people perceive Manx Utilities to 'put customers first' and 'care about the environment'. Cost of electricity is a sensitive area which may benefit from careful communication management in relation to the smart metering programme.

The smart metering programme

Around half of the population were aware of the smart metering programme, but fewer than 1 in 10 feel they know a lot about it. This and the number of "don't know"/"neutral" responses indicates a need for further communication about the project.

Currently, 62% think the smart metering programme will improve understanding of customers' electricity consumption habits, but only 37% think this will translate into reduced energy use/emissions and that the programme will benefit customers. Conversely, 54% think the smart metering programme will increase electricity prices. The open text comments also reflect these views.

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Cost is a poorly rated area that is often difficult to address. In this case it is more likely to affect perceptions of the service Manx Utilities provides to the island, than directly impact satisfaction with customer service received.

The environment

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