



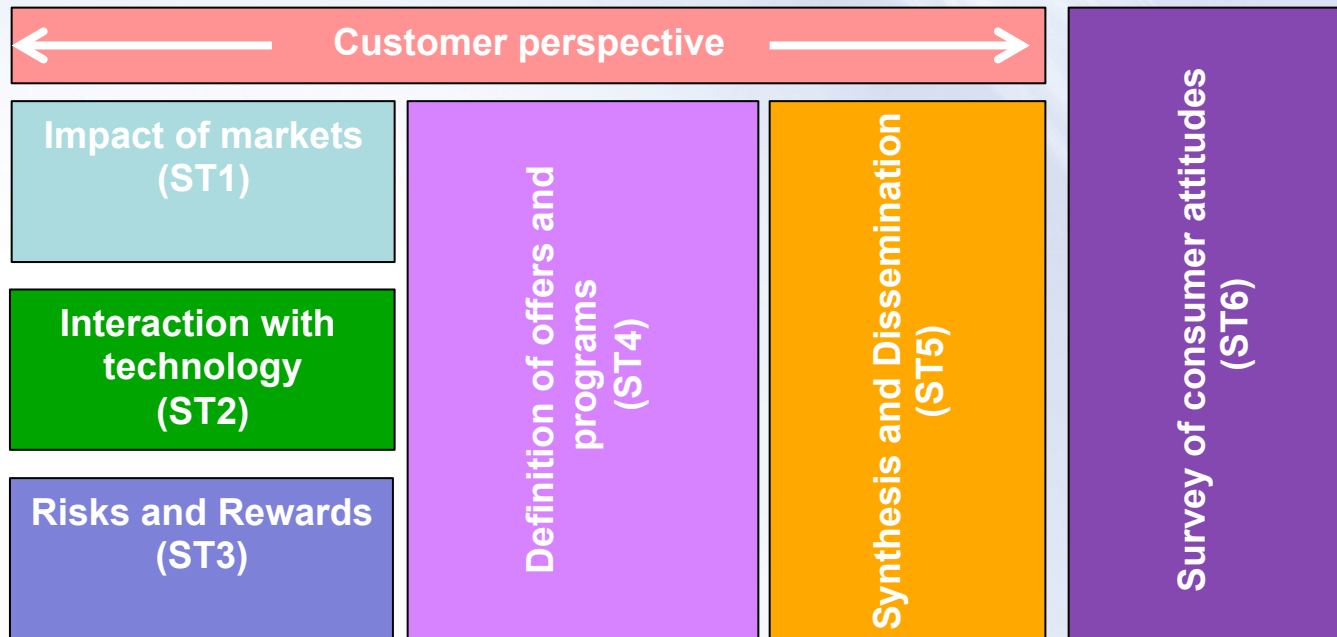
**Proposal for Extension
to Task 23
Survey of Consumer Attitudes**

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Proposal: Survey on Consumer Attitudes (ST6)



Background

- **UK National Team commissioned a market research study to:**
 - determine peoples' attitudes and current behaviours with regard to the energy usage;
 - explore their views and attitudes towards Demand Side Management;
 - Identify the level of rewards necessary for them to take part in a DSM programme; and
 - specific actions which consumers think they could undertake

UK Market Research

- **Research conducted by a specialist company**
 - DH Research
- **1,000 households asked to complete an on-line questionnaire**
 - completed
- **Followed up by two focus groups**
 - Scheduled for end October / beginning November

Approach

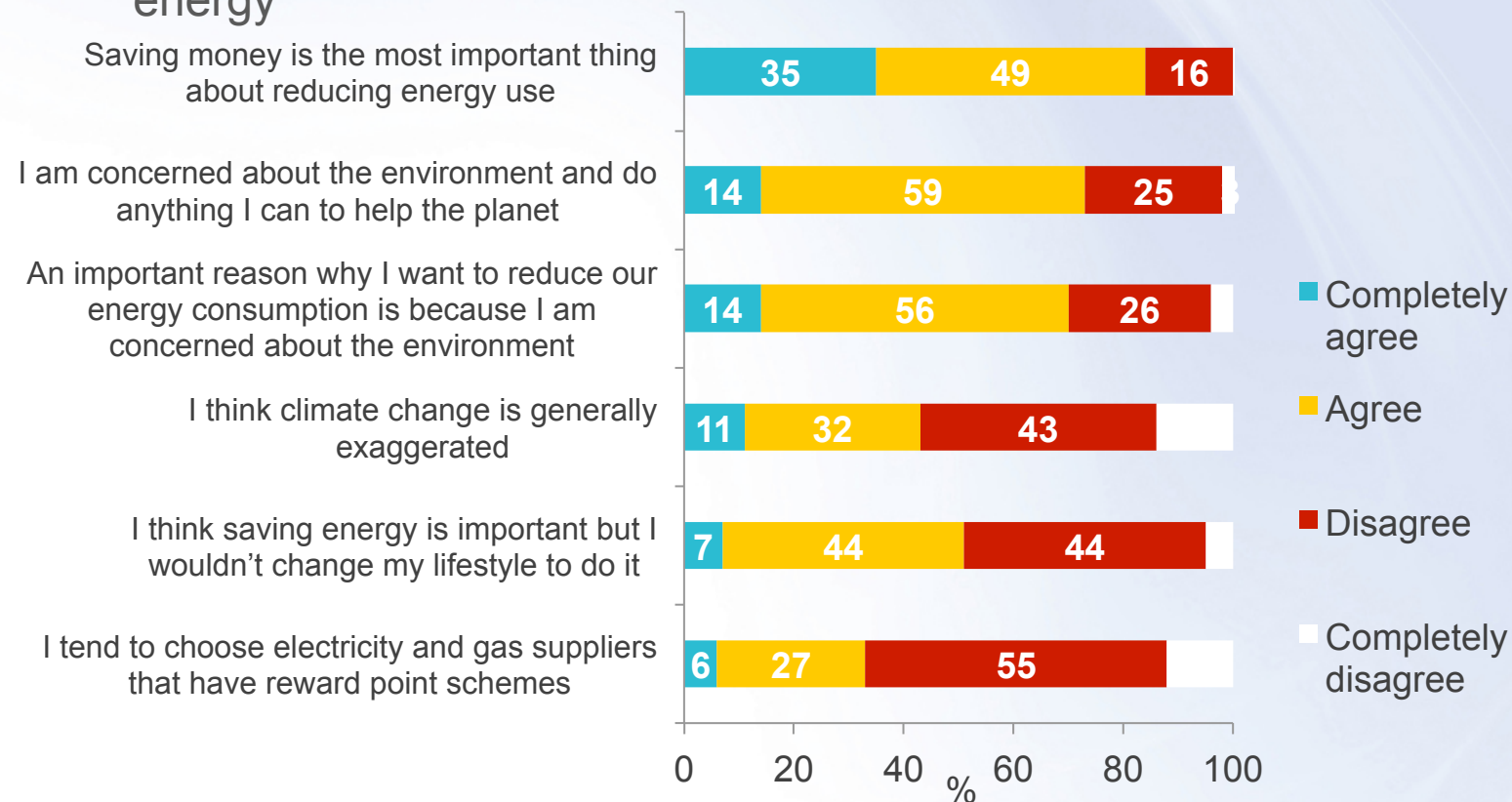
- Questionnaire designed by UK National Team
- Questions structured to explore specific areas & areas of common interest
- Research carried out by specialist research organisation

Attitudes towards energy efficiency

UK market research for Task 23

Q: How far would you agree or disagree with each of these statements...?

- Saving money is the key aspect of energy efficiency...
- Around half (49%) would accept some change in their lifestyle in order to save energy

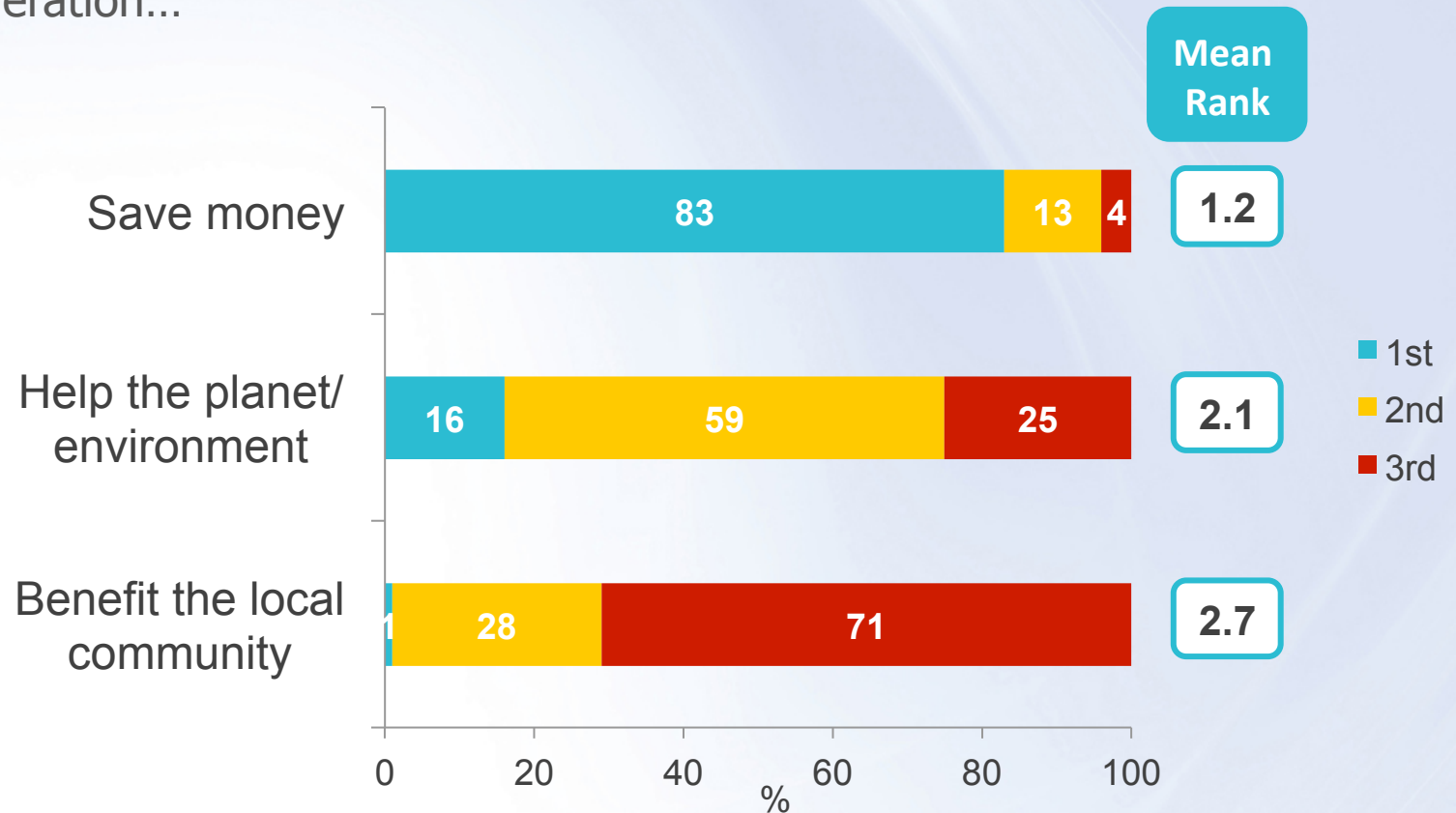


Base: All (1004)

Main Motivations

Q: Which of the following would be your main motivation for reducing your household energy use? ... and the next/2nd most important?

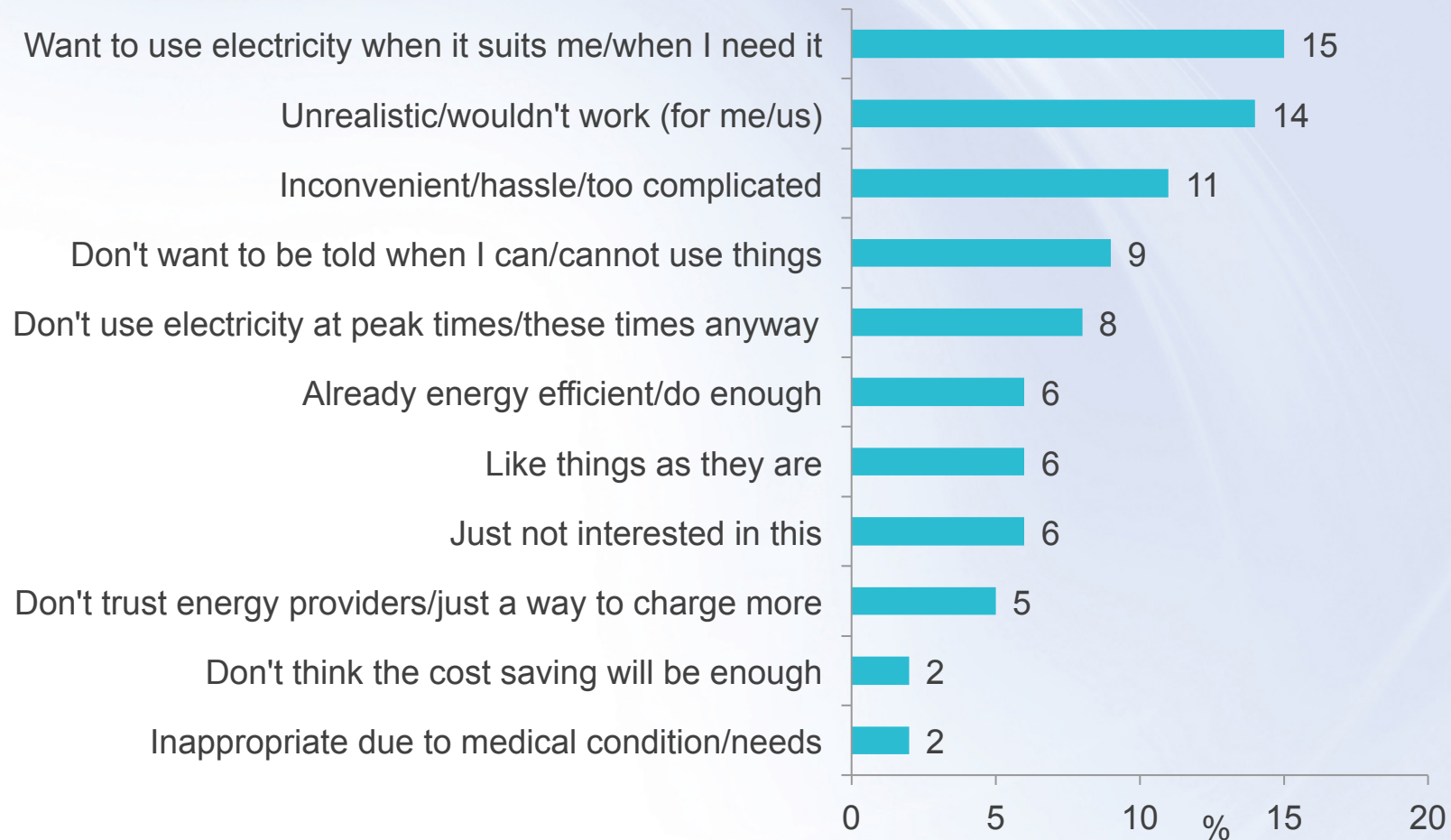
- Saving money is by some way the primary motivation for reducing household energy use, with environmental benefit typically the secondary consideration...



Main Barriers (Unprompted)

Q: Why would you not be interested? What would prevent you from participating in the scheme?

- The main barriers centre on convenience and 'independence'...



Base: Respondents who are not really/not at all interested in the DSR concept (127)

Main Barriers to Participation

Q: Why would you not be interested? What would prevent you from participating in the scheme?

I have a family where someone is present at all times and needs to use electric whenever

You need electricity when you need it – that's all there is to it

It's up to the energy companies to give me electricity when I want it, not when it's convenient for them.

Too much of a hassle. You need to boil a kettle when you wake up. What are the energy companies doing themselves to save energy?

We are out of the home between 8am and 6pm, so we could not really take advantage of the scheme. I don't like the idea of having appliances running while home is unoccupied for fear of anything going wrong, e.g. washing machine leaking causing flooding, or appliance overheating causing fire risk

There would be too much administration and how do they know the day before! We use little electricity and the incentives would be too small for the intrusion.

I am very energy efficient to start with. However, I would not want to have to change my meal times just to suit an energy supplier, or "save the planet". My meal times are during the peak times.

I like to have complete control over what happens in my house

Big Brother is watching – I absolutely hate the idea

Proposed Extension

- **Extend market research survey to include other countries**
- **Approach**
 - Use specialist research company DH Research
 - On-line survey of 1,000 in each participating country
 - **Specific questionnaire designed**
 - Primarily based on UK survey
 - To enable comparisons to be drawn between countries
 - Will include flexibility to address country specific topics
 - e.g. to reflect different motivations for smart grids in participating countries
- **Participation open to all members of IEA DSM ExCo**
 - Not just those already participating in Task 23

Outputs

- **Country specific research findings**
 - As reported directly by DH Research
- **Overview report**
 - comparison of results across participating countries
 - impact on findings of Task 23 to date

Programme of Work

1. Development of survey

- Confirmation of specific research objectives
- Development of questionnaire
 - Core survey will be the same (based on existing UK survey)
 - Flexibility to tailor elements of the survey to specific needs

2. Completion of surveys

- On-line surveys using existing consumer panels
- Survey translated into relevant language
- Test version provided to National Experts
- Pilot phase to validate the questionnaire
- Full roll-out to target audience

Continued ..

3. Analysis and reporting

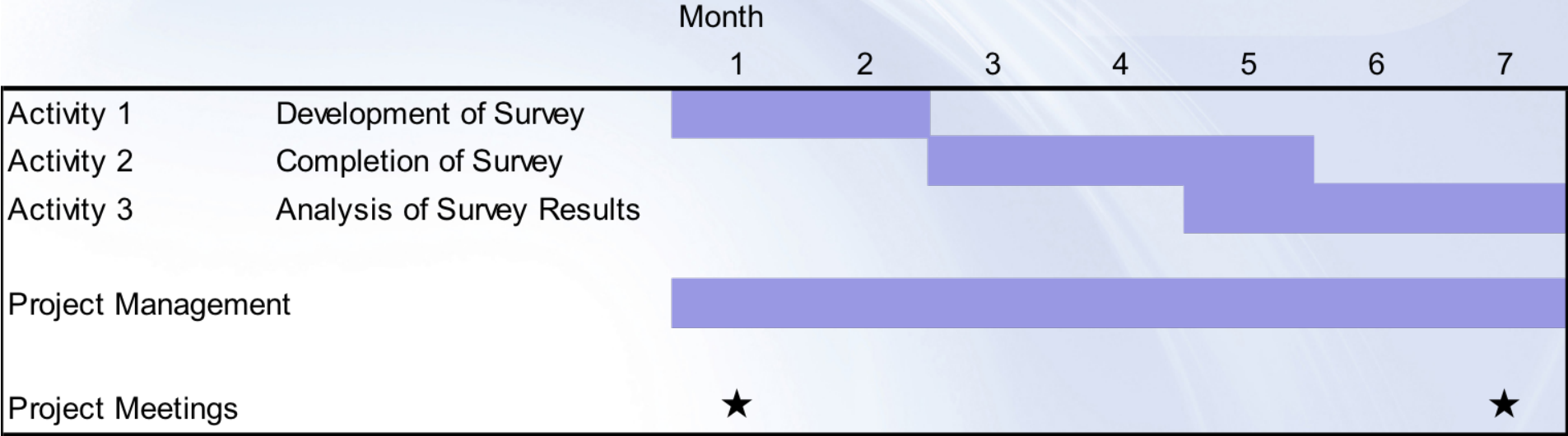
– Country specific results

- Powerpoint presentation containing research findings for own country
- Data tables showing breakdown of results by different sub-groups
- Datafile of all results for own analysis

– Report comparing results across countries

- Similarities / differences
- Revisit conclusions of Task 23
- Impact for policy makers

Work schedule



Proposed Budget for four countries

Cost Share

Activity	Completed by	Manpower (£)	T&S(£)	Sub-Contractor Fees (£)	Totals(£)
1 Development of Survey	Operating Agent	8,190	570	---	8,760
2 Completion of Survey	Research Company (sub-contracted to Operating Agent)	---	---	58,995	58,995
3 Analysis of Survey Results	Operating Agent	30,287	1,723	---	32,010
4 Project Management and ExCo Meetings	Operating Agent	12,146	4,035	---	16,181
Totals:		50,623	6,328	58,995	115,946

Task Share

- 2 person weeks input per country (max)

Budget vs participating countries

Cost Share element

Number of Participating Countries	Total Cost (including sub-contractor fees) (£)	Cost per Participant
Two	£75,798	£37,899
Three	£95,213	£31,738
Four	£115,946	£28,967
Five	£137,189	£27,438

N.B. UK has already completed a National Survey, therefore, the number of countries shown excludes the UK as a participant. It is proposed that UK participate on a Task Share basis

Comments / Feedback