SP Energy Networks

Customer Research Report

Stack Data Strategy

February 2026

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1. Introduction

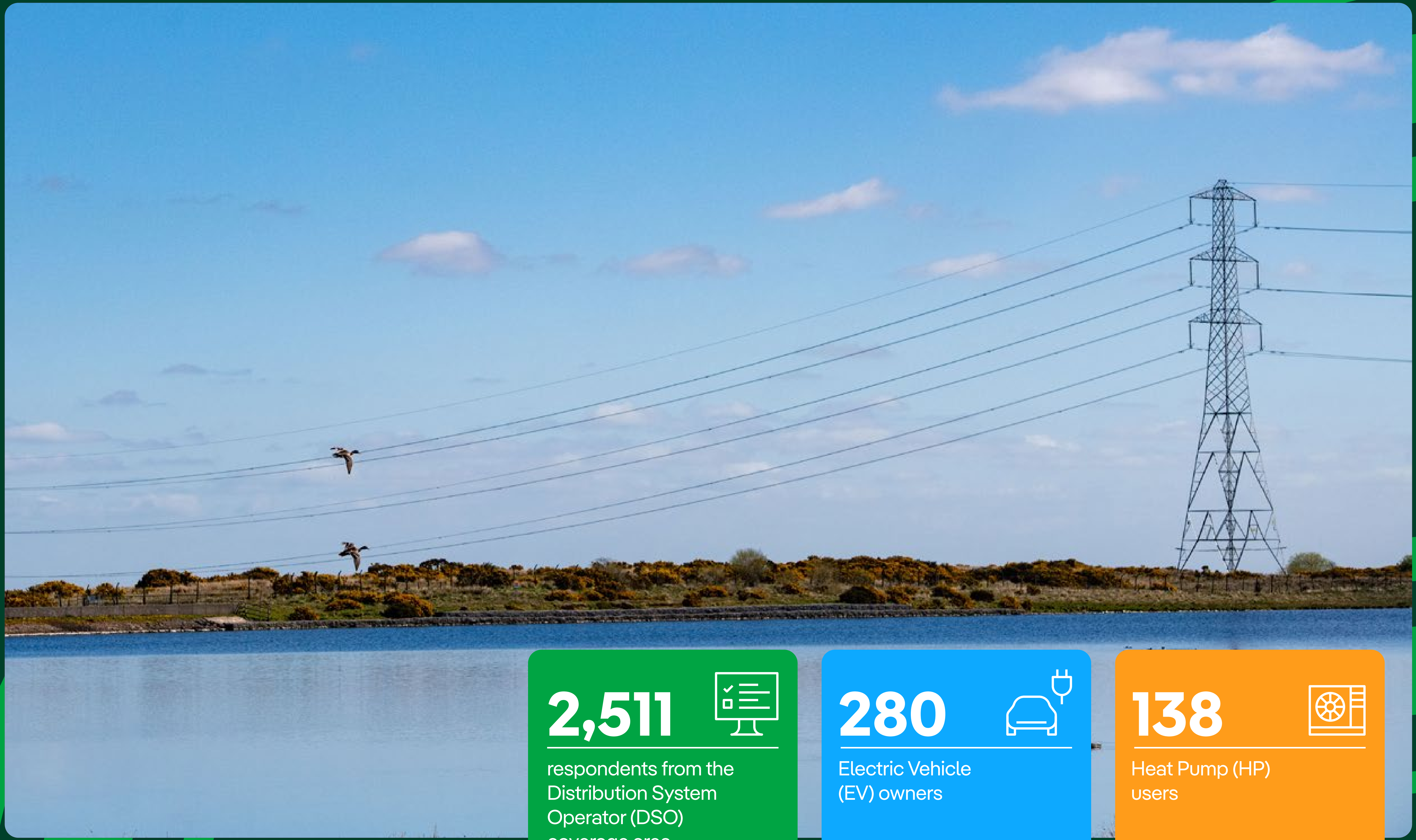
Starting the 19th of November through to the 10th of December 2025, SP Energy Networks (SPEN) commissioned Stack Data Strategy to conduct customer research regarding their awareness, understanding, participation, and opinion of flexibility services.

The report provided detailed data from an original 2,511 respondents who live within the Distribution System Operator (DSO) coverage area, which was extended with data from boosted subsamples of 280 Electric Vehicle (EV) owners and 138 Heat Pump (HP) users. The complete responses are weighted to be representative of the SPEN DSO area by age, gender, education, and 2024 general election vote.

As we transition to a decarbonised power system, the mass electrification of demand requires smarter and more efficient solutions to successfully balance generation and load on a day-day basis. Flexibility services are a key enabler for this. Flexibility is the ability of the power system to adjust generation, demand, or storage in response to system signals to keep the network within safe statutory limits (thermal, voltage, frequency) and avoid costly reinforcement.

A decarbonised power system will comprise of renewable energy sources and domestic Low Carbon Technologies (LCT's). The stochasticity of this green energy creates a problem with varying demand and generation profiles, leading to the balancing of the grid being an ever evolving optimisation problem, particularly with respect to local constraints and/or network congestion.

As such, understanding the current status of customer participation and awareness of flexibility services is crucial for SPEN to evaluate its effectiveness of provided flexibility at present, and how to proceed in maximising its potential effectiveness in the future.



2,511
respondents from the Distribution System Operator (DSO) coverage area

280
Electric Vehicle (EV) owners

138
Heat Pump (HP) users

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2. Key Findings

The research highlights gaps in awareness and engagement, alongside strong latent willingness to participate if barriers are addressed. The data associated with the report have been categorised into 5 areas, each of which is expanded respectively below:

2.1. Awareness

General awareness of energy infrastructure remains very low. Only 5% of respondents report knowing "a great deal" about DSOs, and just 25% correctly identify SP Energy Networks as their local DNO [Stack, 2025a]. Awareness of flexibility schemes is moderate (45%), but recognition of SPEN's own DSO Flex scheme is extremely low (8%). In contrast, supplier-led schemes dominate: British Gas PeakSave (28%), Octopus Saving Sessions (22%), and EDF Sunday Saver (18%) [Stack, 2025a; Stack, 2025b)]. Channels of awareness are primarily energy suppliers (48–73%), followed by TV advertising (33%) and online ads (26%) [Stack, 2025b]. Awareness is higher among low-carbon technology users (approx. 62%), older consumers, and those with smart meters, where awareness of supplier schemes rises to 60–70% [Stack, 2025b].

2.2. Engagement

Current participation in flexibility schemes stands at 33% overall (16% regularly, 17% occasionally), with uptake significantly higher among low-carbon technology users (52–53%) [Stack, 2025a; Stack, 2025b]. Participants tend to be older, higher-income households, and those with children. Younger and middle-aged respondents are more likely to participate when children are present [Stack, 2025b]. Preferences for scheme types are mixed: 19% prefer sessions where they use more energy when cheaper, 19% prefer using less at peak, and 45% would take part in either type [Stack, 2025a; Stack, 2025b].

Note, it is most likely that the engagement in flexibility schemes falls under energy supplier schemes. Even so, the data is indicative of growth potential via use of the existing supplier market reach.

2.3. Barriers

Among non-users, lack of awareness is the leading barrier (57%), followed by perceptions that savings are too small (32%) alongside concerns about complexity of flexibility itself [Stack, 2025a; Stack, 2025b]. Complexity concerns are particularly pronounced among younger LCT users (Stack, 2025b). Despite these barriers, latent demand is strong: 86% of respondents would participate in principle, and 31% would do so for savings as low as £3.65/month, with an average threshold of £12.70/month [Stack, 2025a; Stack, 2025b].

2.4. Motivations

Financial savings are the primary driver of participation (especially in the context of the ongoing cost of living crisis), followed by ease of use and control over energy use. Environmental benefits rank lower overall but matter more to younger respondents and LCT users (Stack, 2025a; Stack, 2025b). When cost savings are excluded, respondents prioritize simplicity and retaining control of energy usage, while skeptical groups value trust and fairness [Stack, 2025b].

2.5. Satisfaction

Satisfaction among current users is high. 76% are satisfied overall, rising to 80% among LCT users [Stack, 2025a; Stack, 2025b]. Most users report saving a small amount yet still find schemes worthwhile. Key improvement levers include better rewards (50%), greater flexibility in timing (37%), and more advanced notice (28%) [Stack, 2025a; Stack, 2025b]. Also worth noting, a slim majority of LCT users favour opt-out enrolment (51%) over opt-in [Stack, 2025a].

76%
satisfaction with Flex

£12.70
a month saving is the min financial incentive to engage in Flex

33%
participation in Flex (extends to **52-53%** with LCT users)

3. Customer Segmentation

Three non-user groups were identified:

Persuadables: aware but unconvinced; need messaging on ease and rewards.

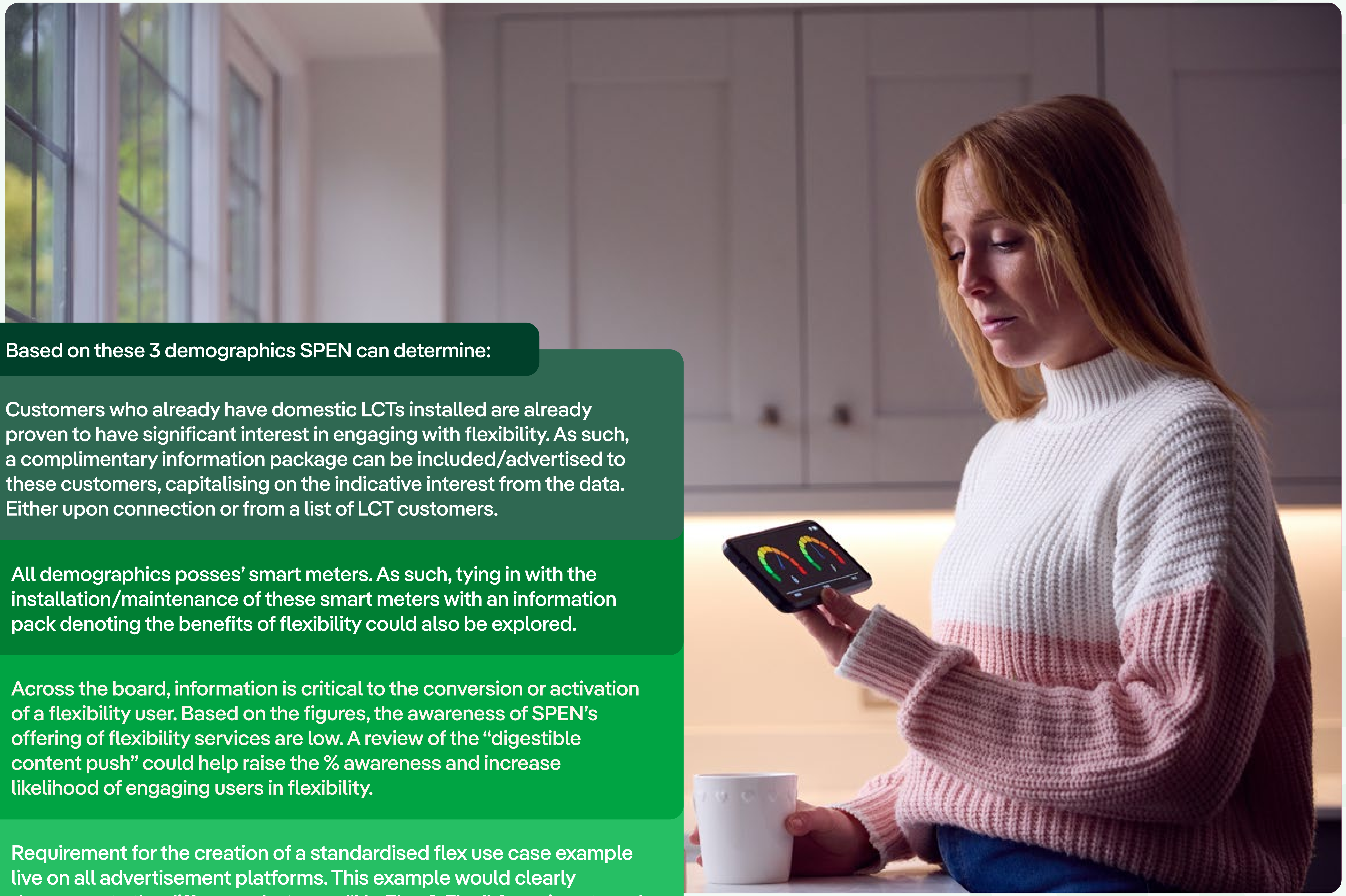
Primed non-users: aware but sceptical; trust and clarity are key.

Prospects: unaware; need basic information and reassurance.

Persuadable users do not currently use a flexibility scheme. However, they do have a smart meter and are fairly energy conscious. The target should be to convert these users towards becoming flexibility users.

Primed non-users also do not currently use a flexibility scheme. However, they do have a smart meter and, in this instance, are very energy conscious. They have also heard about flexibility schemes. Therefore, the target is to activate these users to become flexibility users.

Prospect users again do not use a flexibility scheme. They do have a smart meter and are very energy conscious. However, they have not heard about flexibility schemes. As such, the target should be to inform these users in the hopes of converting them into flexibility users.



Based on these 3 demographics SPEN can determine:

Customers who already have domestic LCTs installed are already proven to have significant interest in engaging with flexibility. As such, a complimentary information package can be included/advertised to these customers, capitalising on the indicative interest from the data. Either upon connection or from a list of LCT customers.

All demographics posses' smart meters. As such, tying in with the installation/maintenance of these smart meters with an information pack denoting the benefits of flexibility could also be explored.

Across the board, information is critical to the conversion or activation of a flexibility user. Based on the figures, the awareness of SPEN's offering of flexibility services are low. A review of the "digestible content push" could help raise the % awareness and increase likelihood of engaging users in flexibility.

Requirement for the creation of a standardised flex use case example live on all advertisement platforms. This example would clearly demonstrate the difference between "No Flex & Flex", focusing strongly on the financial and environmental benefits. The complexity of flex must be simplified to allow for more users to feel comfortable engaging with it.

4. Recommendations & Actions

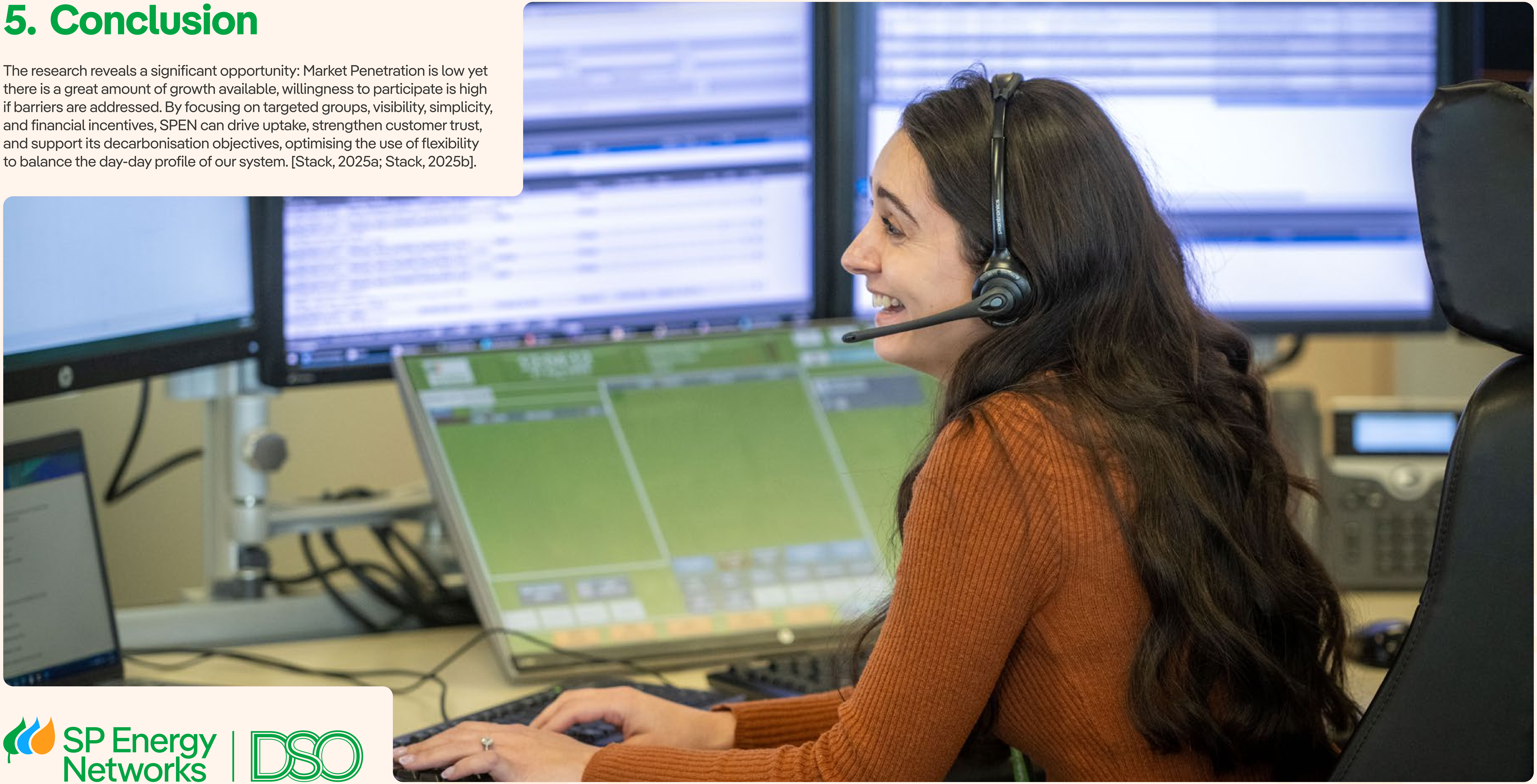
To increase engagement among existing users, improved rewards are the most effective lever (50%), followed by greater flexibility in event timing (37%) and more advance notice (28%) [Stack, 2025a; Stack, 2025b]. Financial messaging is the most effective way to drive participation overall: with financial benefits excluded, messages focusing on ease of use and user control are most persuasive [Stack, 2025b]. Other ways of increasing participation would be to consider opt-out models for low-carbon tech users (51% support) and explore potential partnerships with suppliers to leverage their higher engagement rates [Stack, 2025a]. Tailored marketing for the 3 key users' groups should also be strategically rolled out, unique to each target pan.

The following action table demonstrates potential next steps to increase flexibility engagement across our users:

Action	Purpose
Creation of LCT complimentary Flex information package	Capitalize on current and forecast high (& inevitable) LCT uptake to advertise flex
Creation of complimentary Smart Meter information package	Capitalize on current and forecast high (& inevitable) Smart Meter uptake to advertise flex
Review of current Flex content and advertisement	Data indicates current SPEN awareness is low. Review of current strategy could highlight reasons why
Creation of digestible flex example scenario	Simplify complexity of flexibility for end user + demonstrate its key benefits
Engagement with suppliers to enter partnership for flexibility schemes	Capitalize on market reach from supplier, piggyback our schemes onto that
Feasibility study of above actions	Testing of intended actions to gauge effectiveness

5. Conclusion

The research reveals a significant opportunity: Market Penetration is low yet there is a great amount of growth available, willingness to participate is high if barriers are addressed. By focusing on targeted groups, visibility, simplicity, and financial incentives, SPEN can drive uptake, strengthen customer trust, and support its decarbonisation objectives, optimising the use of flexibility to balance the day-day profile of our system. [Stack, 2025a; Stack, 2025b].



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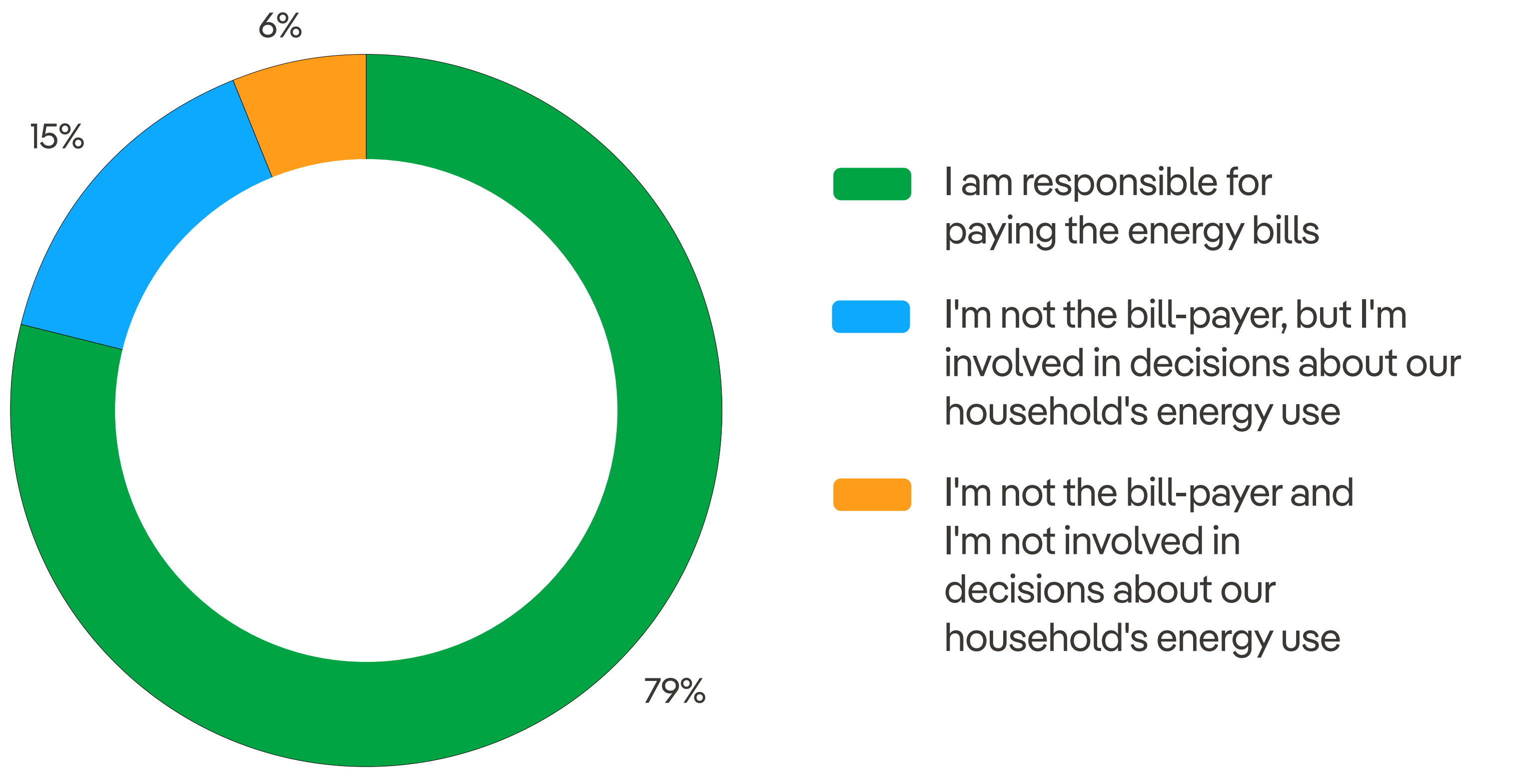
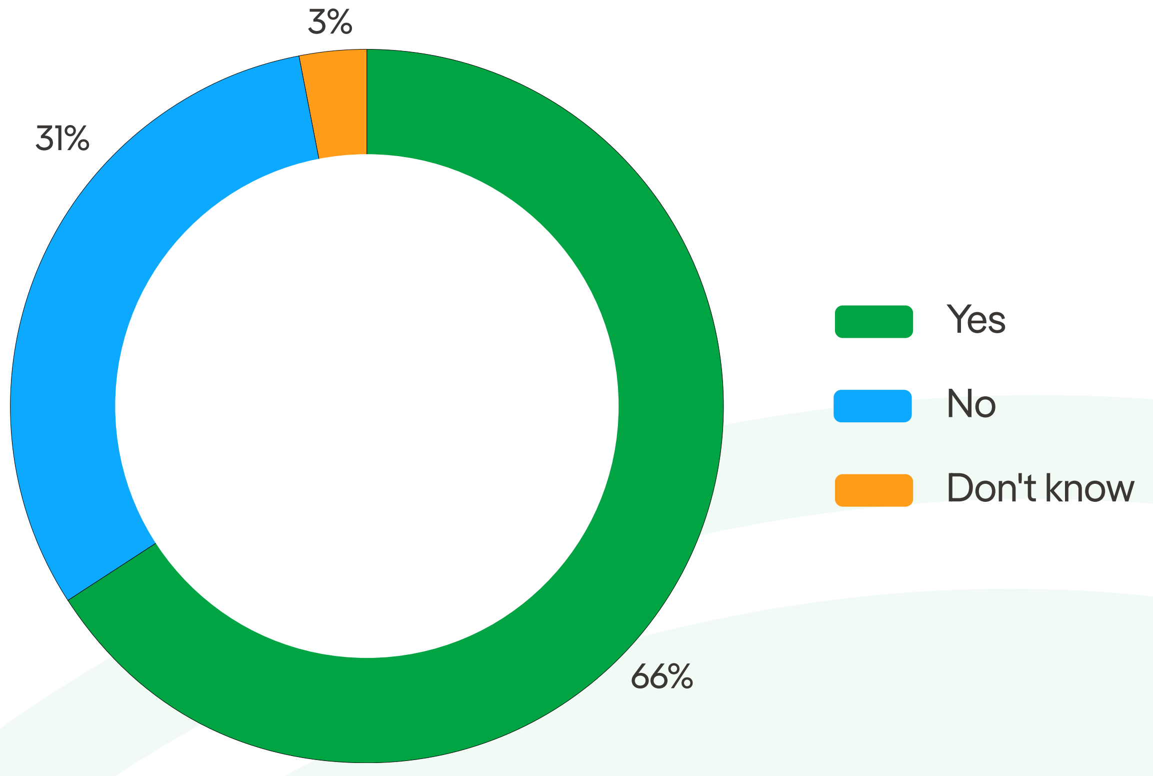
Appendix A: Sample Composition

Sample composition: energy profile of respondents

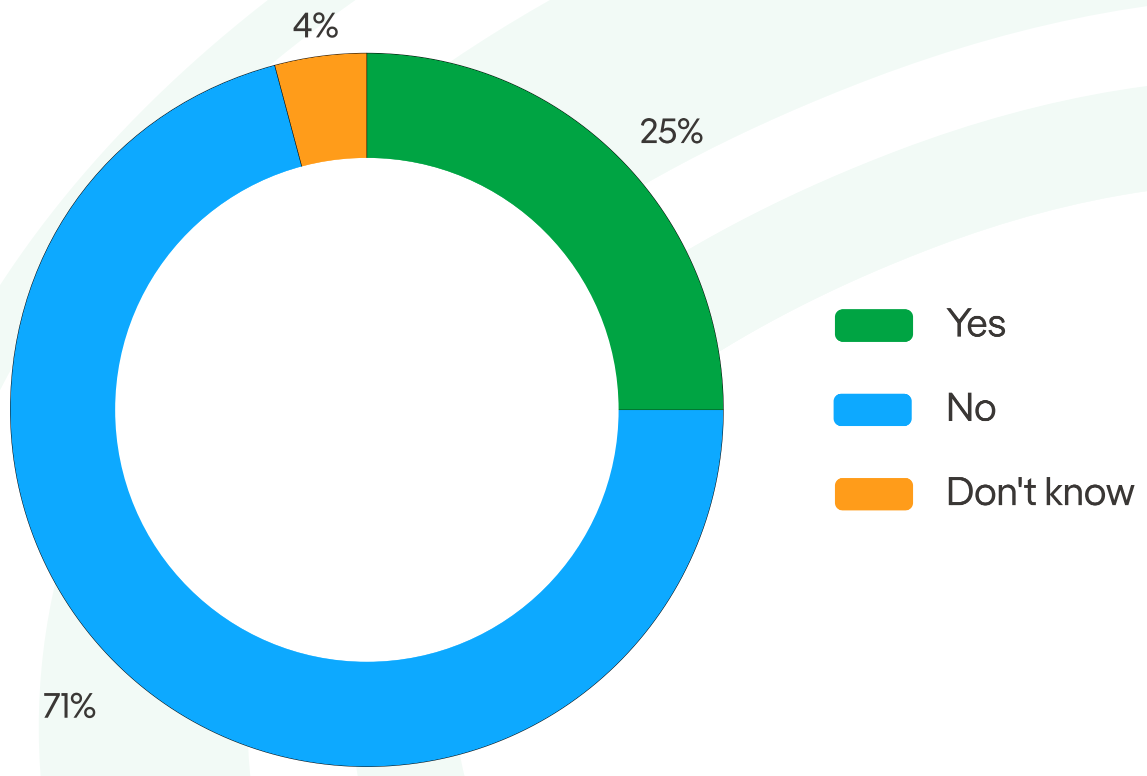
Which of the following best describes your involvement with energy bills in your household?



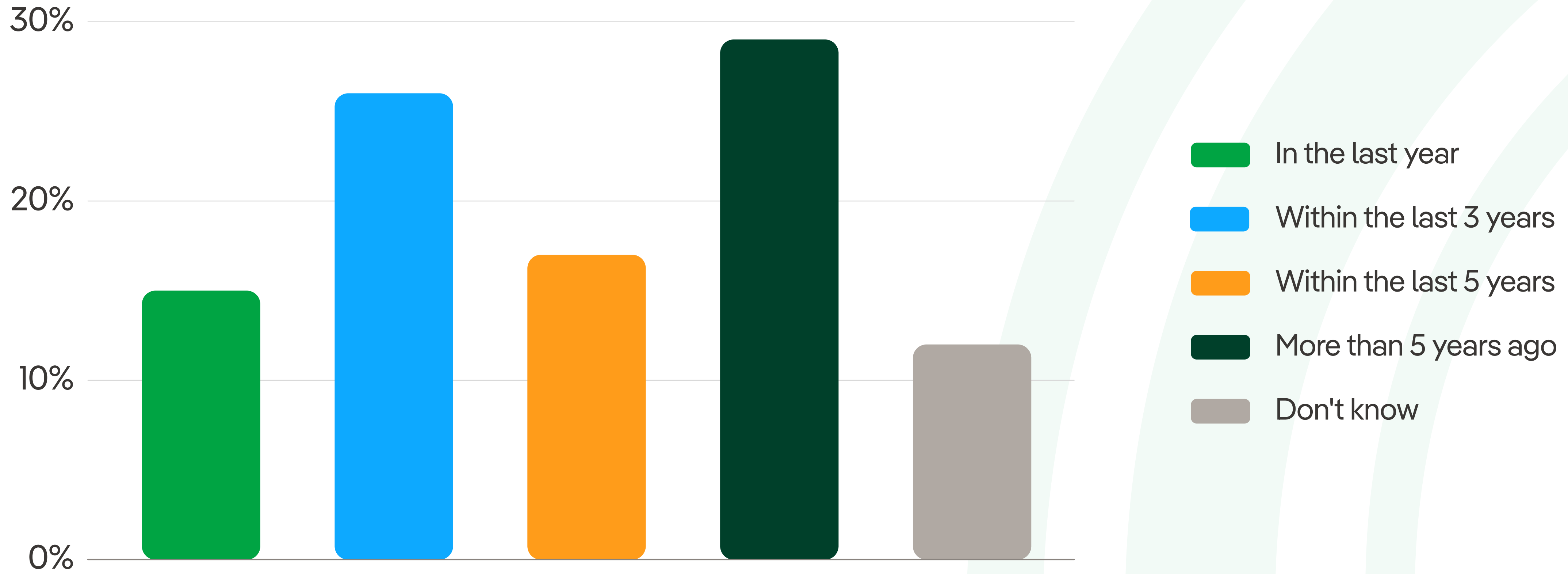
Do you currently have a smart electricity meter in your home?



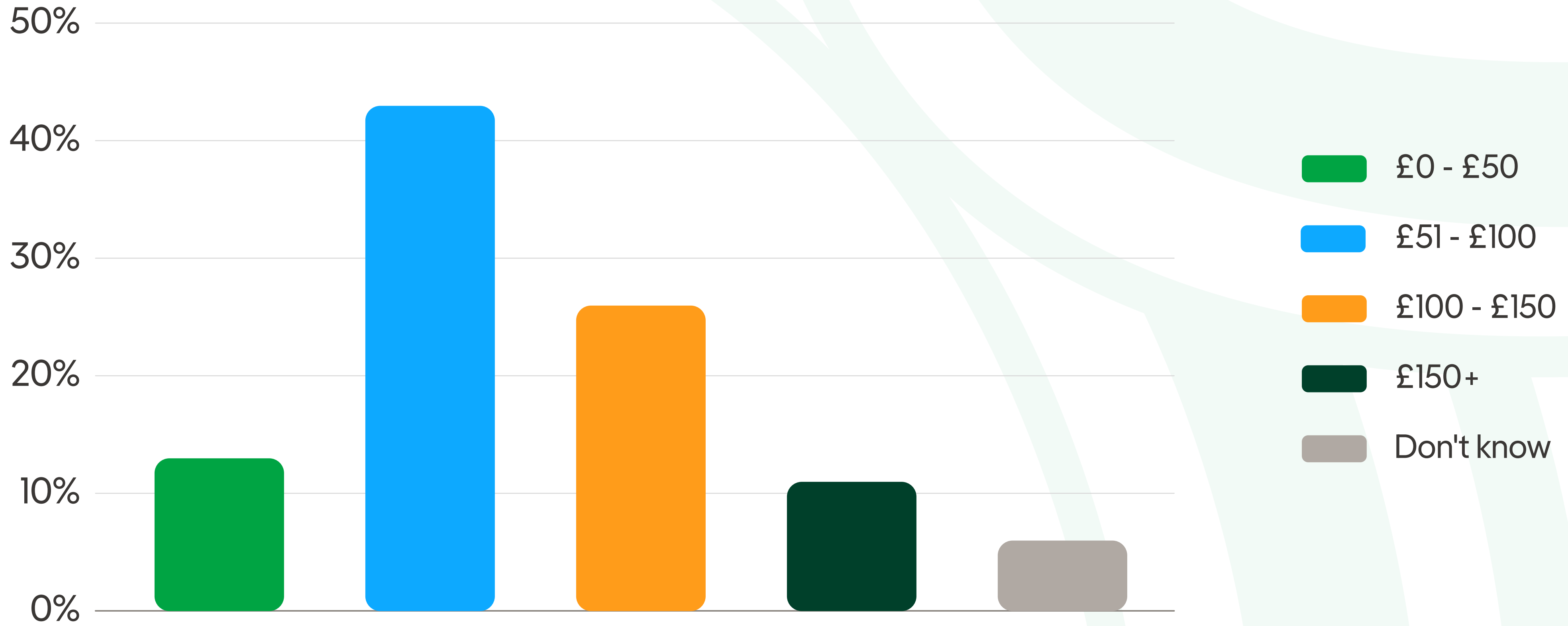
Do you have a prepayment meter for your household energy supply?



When was the last time you changed energy supplier at home?

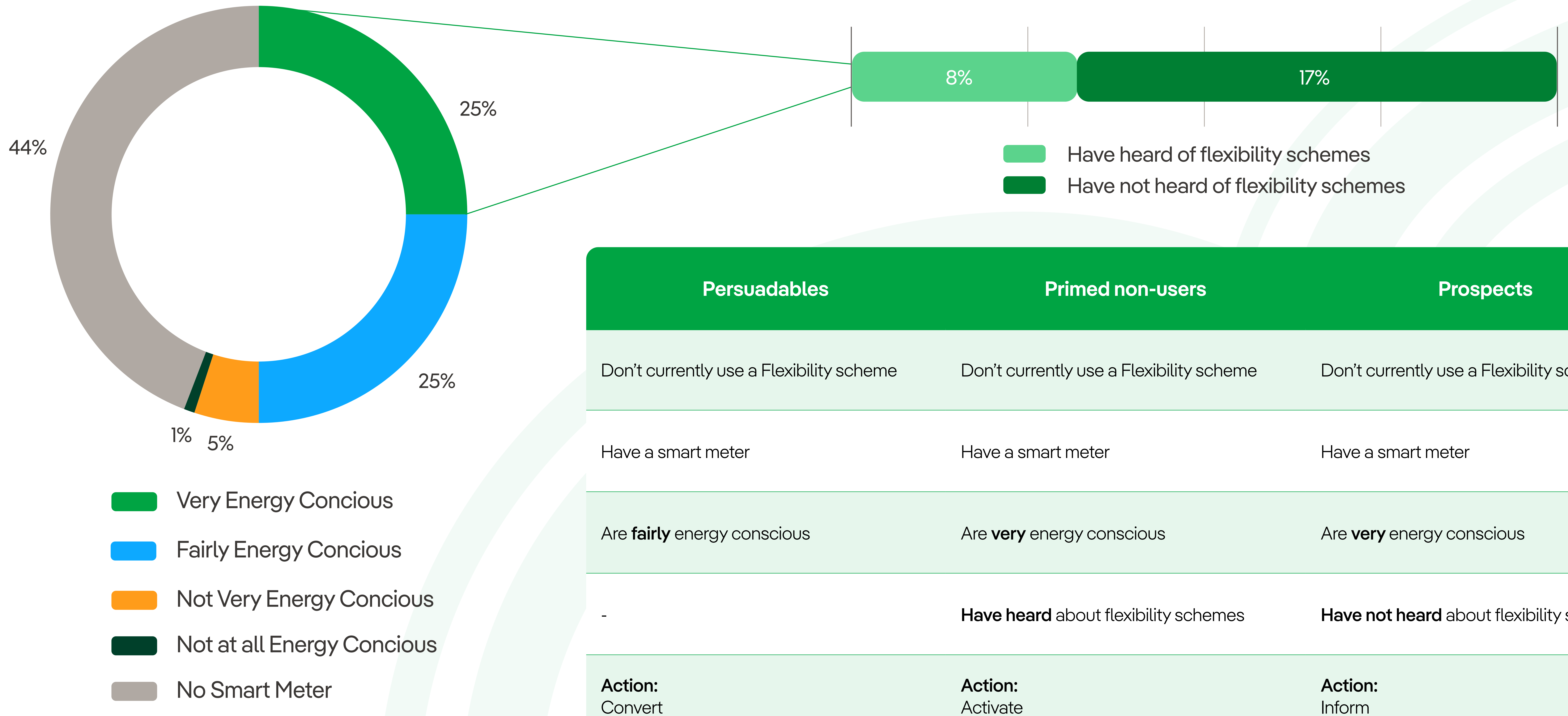


To the best of your knowledge, how much do you currently spend each month on electricity?



Appendix B: Customer Segmentation

Do you currently, or have you ever, taken part in any energy-saving schemes like those mentioned previously?



Persuadables	Primed non-users	Prospects
Don't currently use a Flexibility scheme	Don't currently use a Flexibility scheme	Don't currently use a Flexibility scheme
Have a smart meter	Have a smart meter	Have a smart meter
Are **fairly** energy conscious	Are **very** energy conscious	Are **very** energy conscious
-	**Have heard** about flexibility schemes	**Have not heard** about flexibility schemes
Action: Convert	**Action:** Activate	**Action:** Inform

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The full Stack Report can be viewed HERE.