SPEN x Stack Data Strategy

Flexibility Polling Briefing

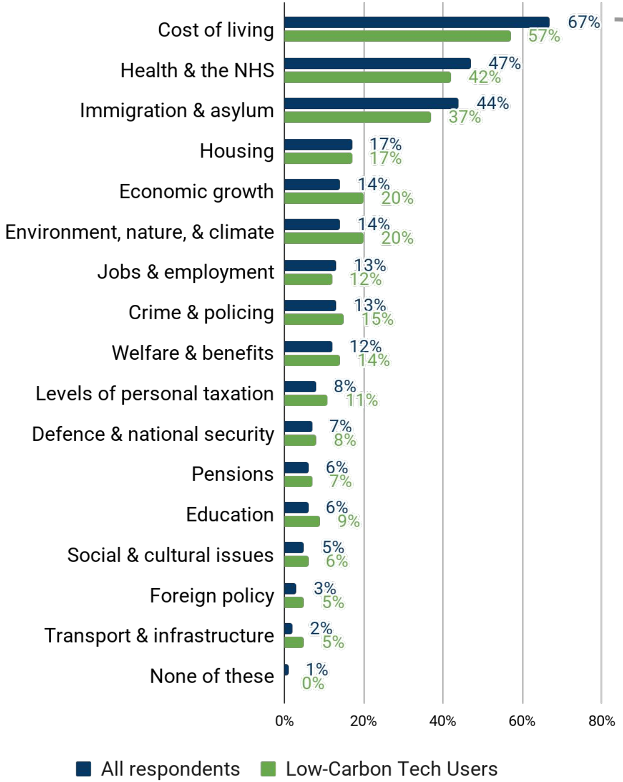
Executive summary

- **Consumers remain most concerned about the cost of living**, with **rising energy bills the key driver**. Older people in particular say they are very conscious of their energy use and to actively try to reduce consumption to lower bills.
- Public **awareness of flexibility schemes is moderate (45%)** and higher among low-carbon technology users and older consumers. **Around half of customers are aware of their own supplier's scheme**, with awareness generally increasing with age.
- **One third of consumers (33%) report using flexibility schemes**, including 16% who use them regularly. Users are more likely to be older, higher-earning, and have children.
- Among non-users, we identify three distinct groups: **Persuadables, Primed non-users** and **Prospects**. These groups differ in demographics and attitudes to energy bills, suggesting a need for tailored messages and interventions.
- **Lack of awareness is the main barrier to participation**, with 57% saying they have not heard enough about flexibility schemes. Information campaigns should prioritise visibility, simplicity, and potential savings: notably, **31% of non-users would consider participating for savings as low as £3.65 per month**. Barriers are similar among low-carbon technology users, although younger users are particularly concerned about schemes being complicated.
- **Satisfaction among users is high, with 76% satisfied overall**. Satisfaction is highest among low-carbon technology users, younger consumers, and those motivated by helping the environment rather than saving money alone. While perceived savings are generally modest—**only 11% say they save "a lot"**—higher perceived savings are associated with greater satisfaction, though are not the only factor.
- 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%). **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.

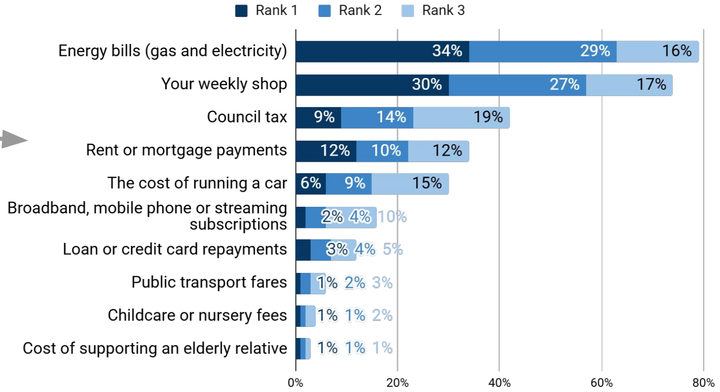
Context and Baseline

Cost-of-living pressures remain front of mind for consumers, with energy bills identified as the biggest strain on finances

Which of the following do you think are the most important issues facing the country at the moment?
Please select up to three issues.



Thinking about the rising cost of living, which of the following price increases have had the biggest impact on your personal finances?
Please rank the top 3

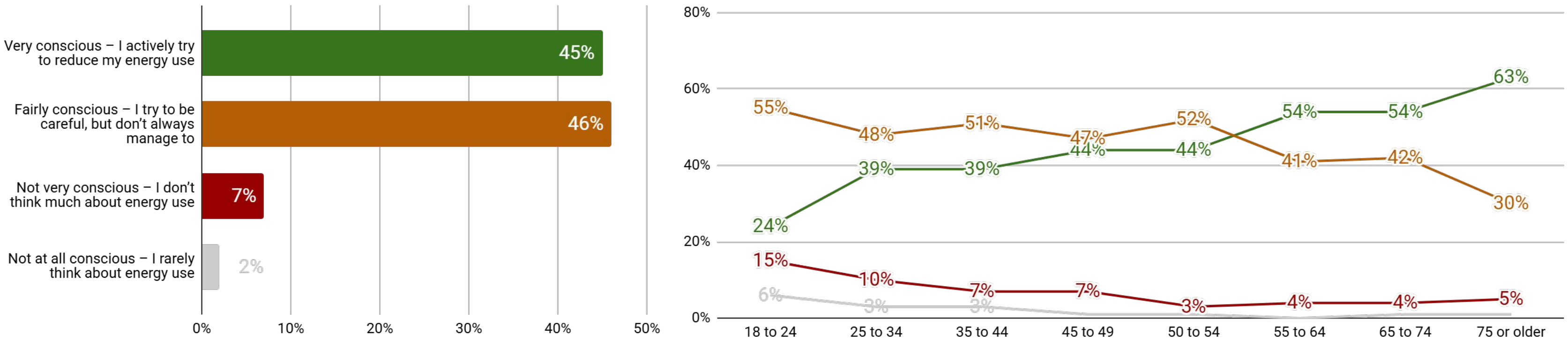


The cost of living continues to dominate as an issue among the public. Much of the blame for this lands on increases in energy bills, which are felt to have impacted people’s finances more than any other price increase.

Low-Carbon Technology users report being somewhat insulated from the rising cost of living as an issue, being less likely to include it as a major issue. Instead these respondents were more likely to list “Economic growth” and “Environment, nature, and climate” as top issues.

This shapes how the public think about their energy use, with most saying they try to save energy in order to reduce costs

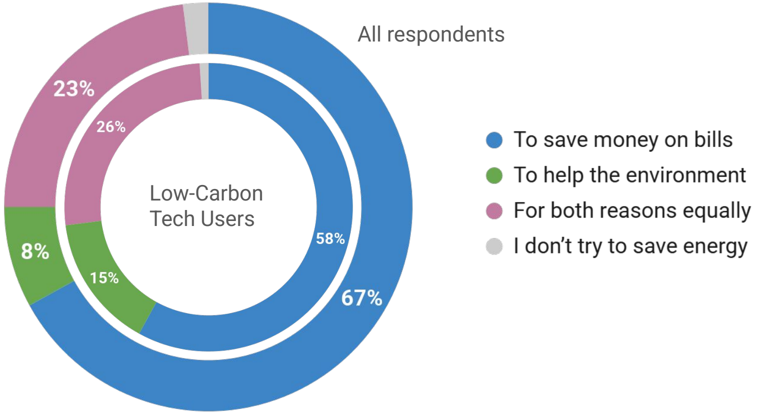
How conscious would you say you are about your household's energy use?



Across the population, respondents tend to say the are "conscious" of their energy use, but dividing this into "very" vs. "fairly" conscious, we see a clear trend for older people to report greater concern over their energy use.

Respondents overwhelmingly say they save energy in order to save money on bills, with fewer than one in ten saying they do it entirely to help the environment. Among low-carbon technology users, the share who say they save energy to help the environment is almost double that in the rest of the country, highlighting slightly different priorities in this group, though the majority still save energy to save money.

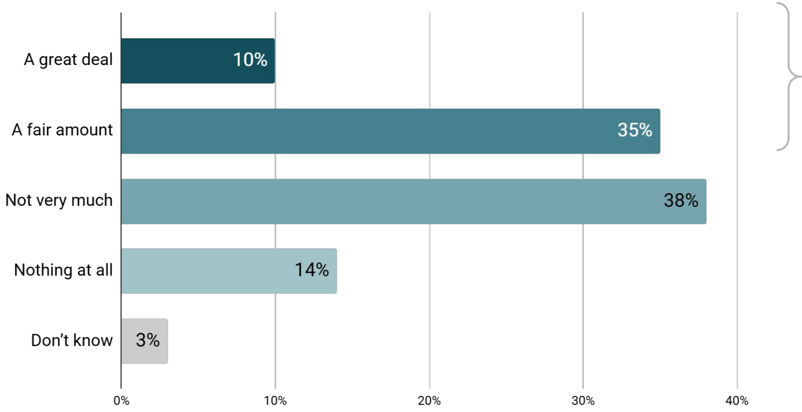
When you try to save energy, what is your main reason for doing so?



Awareness and uptake

Awareness of flexibility schemes is highest among low-carbon technology users, older people, and more highly-educated respondents

How much have you heard about energy supplier or network operator schemes that reward customers (for example, with discounts or vouchers) for using energy at particular times, like off-peak hours or weekends?



64% Low-carbon tech	**48%** £100 - £150*	**40%** 35 to 44
53% 25 to 34	**47%** £150+*	**40%** C2DE
52% 65 to 74	**45%** £51 - £100*	**40%** 50 to 54
51% Degree	**44%** 55 to 64	**36%** 18 to 24
50% 75 or older	**43%** Fairly conscious†	**36%** 45 to 49
50% ABC1	**42%** No Degree	**33%** Not very conscious†
49% Very conscious†	**42%** £0 - £50*	**18%** Not at all conscious†

Just under half (45%) of respondents report having heard a "great deal" or "fair amount" about flexibility schemes (when given a description). Underlying this we find particularly high awareness among low-carbon tech users (62%).

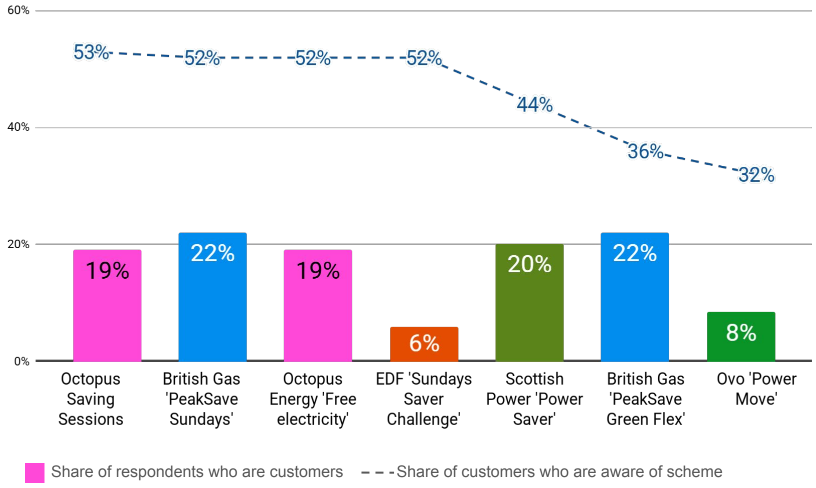
Generally, awareness is higher among older respondents, those with degrees, respondents who are more conscious about their energy use and those with higher energy bills.

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

† How conscious would you say you are about your household's energy use?

Roughly half of customers report awareness of their own supplier’s scheme, with older customers tending to be more aware

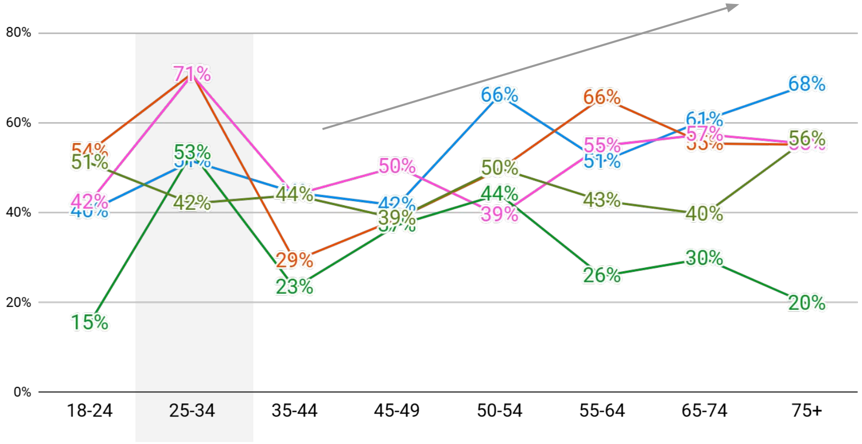
How much, if anything, have you heard about the following energy-saving schemes? (Share who say “A great deal” or “A fair amount”)



We find an interesting age pattern, with older customers generally being more likely to have heard about their suppliers scheme, but with 25-34 year olds showing a spike in awareness.

Across Octopus, British Gas, and EDF around half of customers have heard about their supplier’s flexibility scheme, this indicates there is something of a ceiling in terms of how many customers a supplier can reach with information about their schemes.

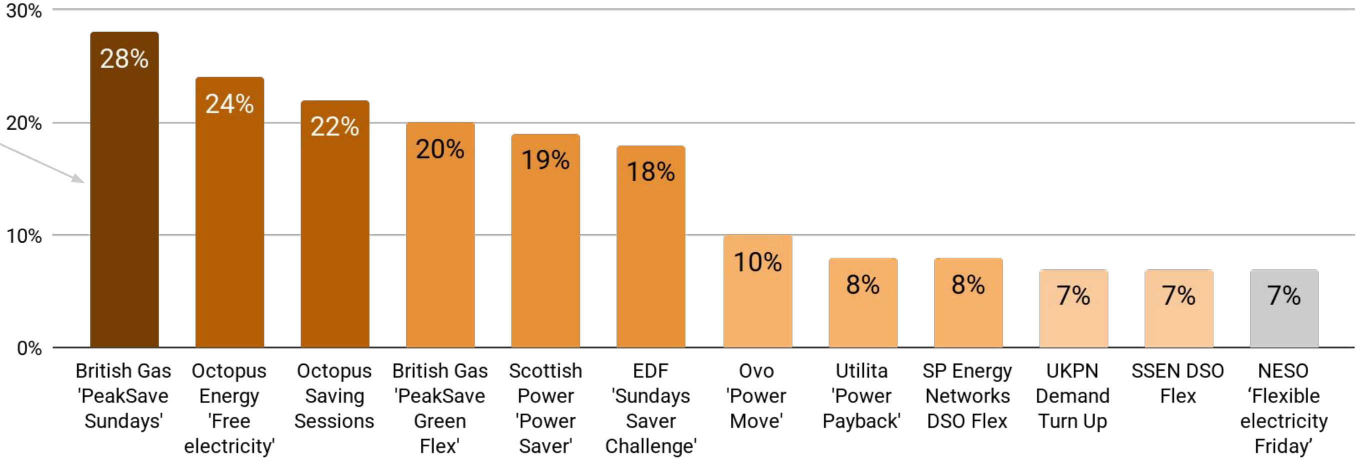
Awareness rises to around 60-70% for these schemes among customers who have smart meters, and are therefore eligible to take part.



Supplier schemes tend to be much better known than their equivalents among network and system operators

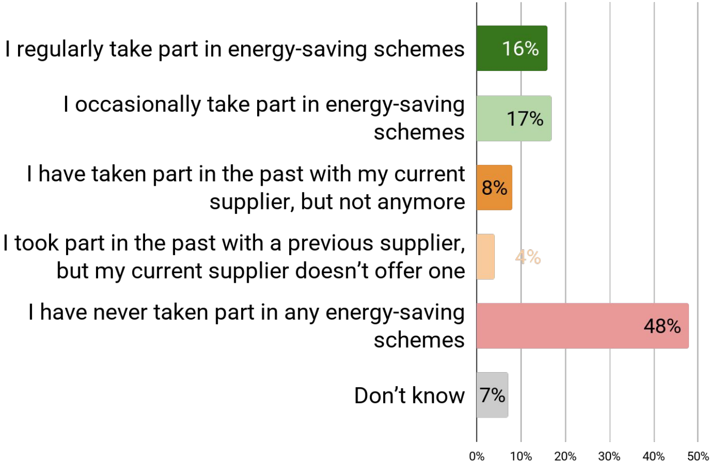
How much, if anything, have you heard about the following energy-saving schemes? (Share who say “A great deal” or “A fair amount”)

Most schemes are known by a similar share of customers, British Gas leads here partly because more respondents report being customers of British Gas.



Around a third of respondents say they use flexibility schemes, with usage higher among older and more financially secure groups

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



Share who report using energy-saving schemes regularly or occasionally

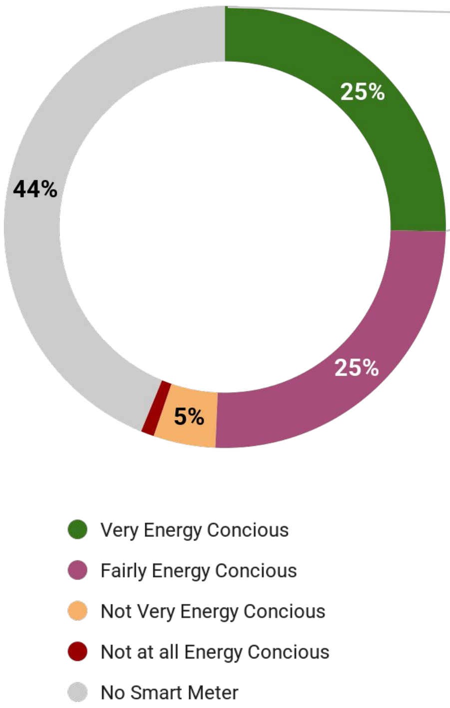
	Age Children in household									
Income	18-24		25-34		35-49		50-64		65+	
	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes
£0 - £28,000	30%	41%	23%	41%	18%	31%	39%	36%	44%	-
£28,001 - £62,000	14%	21%	32%	41%	22%	26%	28%	33%	46%	-
£62,001+	24%	-	43%	50%	33%	44%	54%	26%	34%	-

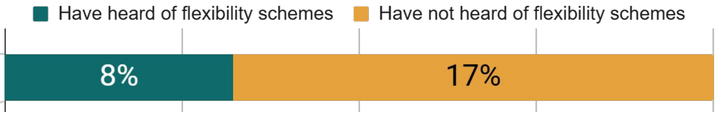
Those who report using energy-saving schemes tend to be: **older, and higher income**. Young and middle aged respondents are more likely to report using a scheme if they have children living at home.

Among the two thirds who do not currently use flexibility schemes, three groups represent clear low-hanging fruit for increasing uptake

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

Those who report not using a scheme





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

These groups differ demographically, particularly in their financial situation and how they perceive their energy bills

	All respondents	Primed non-users	Prospects	Persuadables
Age				
18-24	11%	7%	6%	16%
25-34	15%	17%	9%	14%
35-49	25%	25%	30%	30%
50-64	25%	27%	32%	24%
65+	23%	24%	23%	14%
Education				
No Degree	71%	69%	78%	74%
Degree	29%	31%	22%	26%
Employment				
In work	55%	59%	52%	59%
Retired	24%	26%	28%	16%
Student/Other	9%	6%	9%	9%
Unemployed	12%	8%	11%	16%

	All respondents	Primed non-users	Prospects	Persuadables
Income				
£0-28,000	36%	29%	44%	31%
£28,001-62,000	42%	48%	42%	44%
£62,001+	16%	21%	8%	22%
Monthly Electricity Spend				
£0-50	13%	7%	20%	12%
£51-100	43%	47%	48%	46%
£100-150	26%	26%	17%	27%
£150+	11%	18%	12%	10%
Why save energy?				
Save energy to save money	67%	66%	76%	71%
Save energy for the environment	8%	12%	4%	8%
Both equally	23%	20%	19%	20%

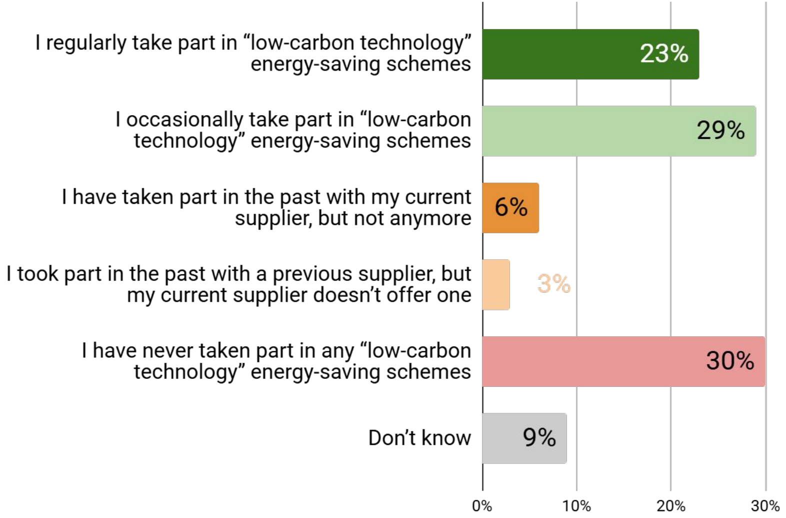
Primed non-users tend to be workers, have higher incomes, and spend more on their energy bills.

Prospects tend to be middle aged to older and are less degree educated but report lower incomes, and though they spend less on their energy bills, they are more likely to try and save on energy to cut their bills.

Persuadables tend to be younger workers earning slightly more than average.

Uptake of flexibility schemes is much higher among low-carbon technology users, who mostly participate via schemes offered by their energy supplier

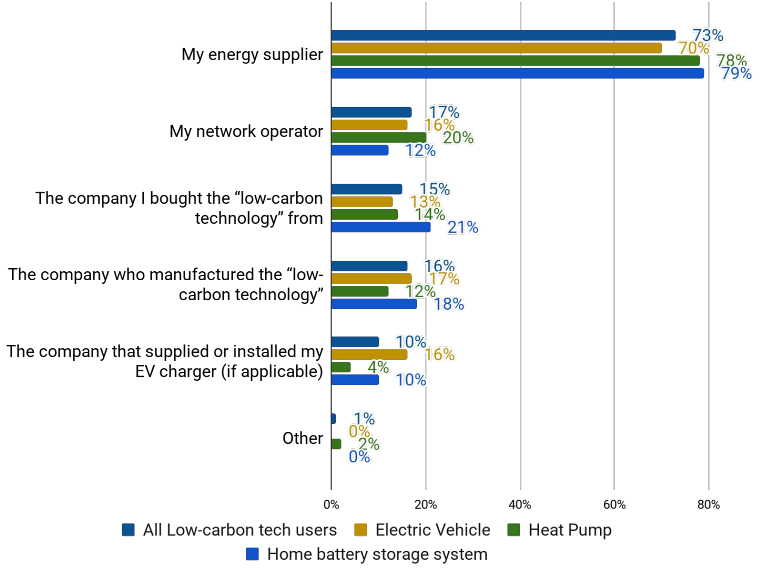
You said you owned (or regularly used) a form of "low-carbon technology" (e.g. electric vehicle, heat pump, battery storage)
Do you take part in any energy-saving or flexibility schemes involving this technology?



Overall among low-carbon technology users, uptake of flexibility schemes is higher (52%) than among the general public (33%).

Younger low-carbon tech users are more likely to say they use flexibility schemes (under 50: 59%, over 50: 43%). They also tend to use schemes from a wider variety of providers.

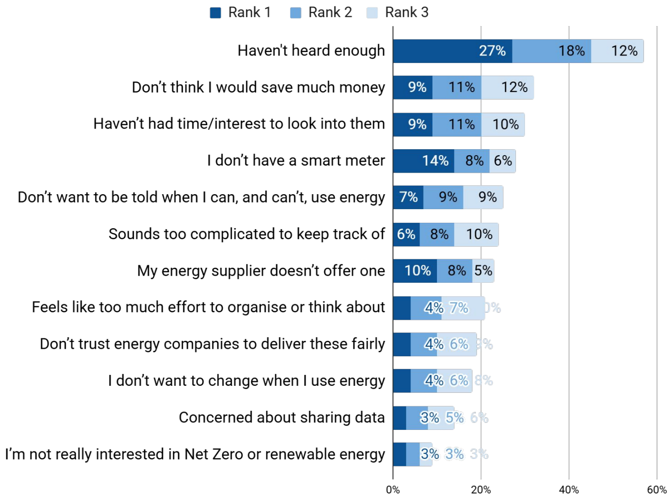
You said you used "low-carbon technology" energy-saving schemes...
Who offers the schemes you take part in? (Select all that apply)

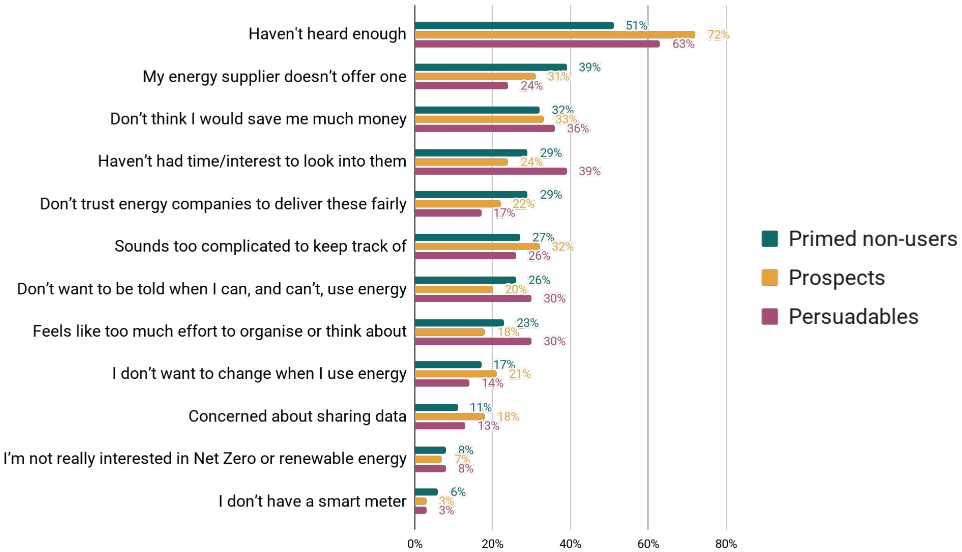


Barriers to using flexibility schemes

The biggest obstacles to participation are low awareness and the belief that flexibility schemes offer limited savings and are inconvenient

You said you don’t currently use any energy-saving or flexibility schemes... Which of the following best describes why you do not take part in them? Please rank the top 3 reasons *[All non-participants]*





Overall, lack of awareness and incentives are the biggest reported barriers. Outreach campaigns should focus on ease of use and the size of potential rewards as these are other key barriers.

Among **primed non-users**, respondents are more likely to report that their supplier doesn’t offer a scheme - they may therefore be a prime candidate for operator schemes. These customers are also less trusting of energy companies, meaning outreach must be careful.

Prospects are, unsurprisingly, less aware of flexibility schemes. Messaging with this group should focus on ease of use, as they are more likely to be concerned about how complicated flexibility schemes might be.

Persuadables haven’t felt the need to look into flexibility schemes, they think they would be too much effort to use and don’t think they would save enough for it to be worth changing when they use energy.

When asked to describe what would encourage participation in their own words, concerns about the level of financial reward become more prominent

What would make you more likely to take part in an energy-saving or flexibility scheme like this?

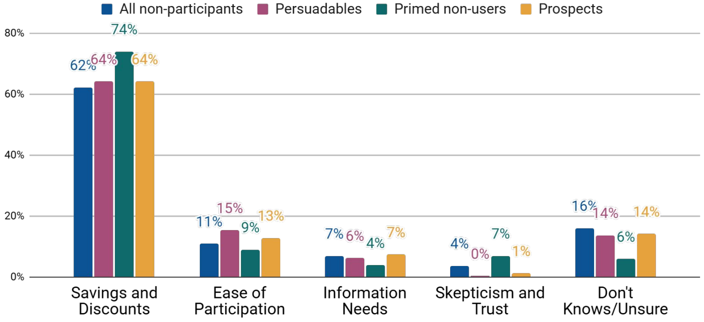
Savings and discounts

Responses focused on the desire for financial savings, discounts, and incentives.

Ease of Participation

Responses emphasizing the importance of simplicity, convenience, and clarity in the process of joining and engaging with Flexibility schemes.

We used AI models to assist in classifying open-text responses into four distinct groups. These groups underline the findings of our discrete-choice question, highlighting that **the scale of discounts are vital to non-participants** considering flexibility schemes.



Overwhelmingly responses focus on "savings and discounts". **Primed non-users** tend to be even more concerned over potential savings, and are more skeptical of schemes. **Persuadables** emphasise ease of participation more than average.

Information Needs

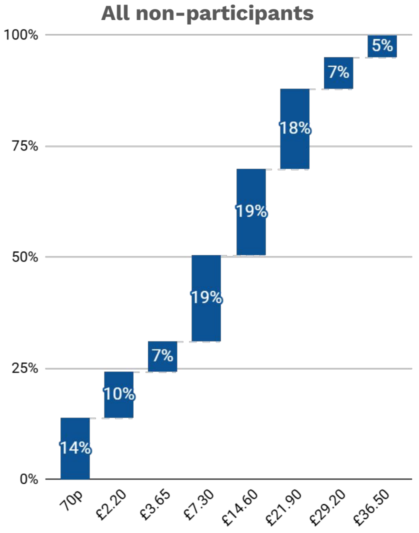
Responses that express a requirement for clear, detailed information regarding the benefits, processes, and conditions associated with energy-saving programs.

Scepticism and Trust

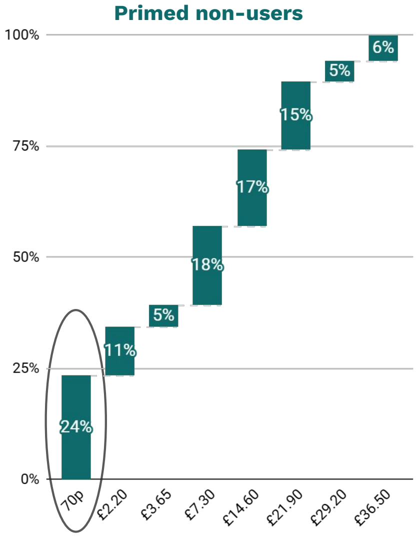
Responses reflecting doubts about the effectiveness and reliability of energy-saving measures, including concerns about smart meters and the trustworthiness of energy companies.

Addressing this scepticism matters: highlighting savings of as little as £3.65 a month (5%) could encourage a third or more to participate

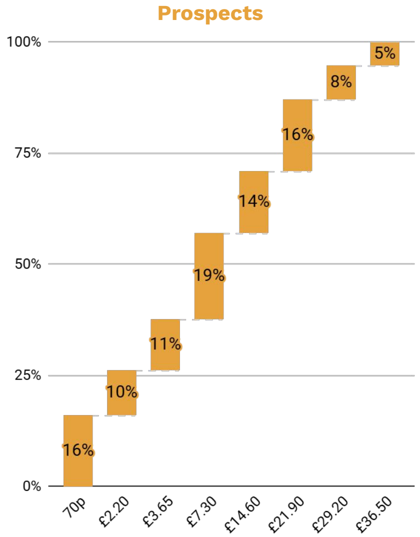
If your energy supplier or a third party offered you a [X] discount on your electricity bill, but you had to regularly change when you use energy (for example, running appliances or charging your EV late at night or at weekends) would you be willing to take part in such a scheme?



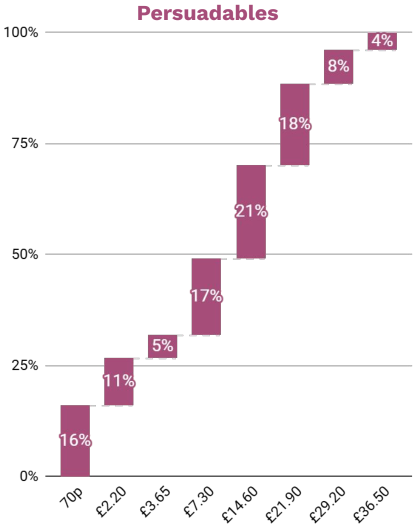
All non-participants



Primed non-users



Prospects

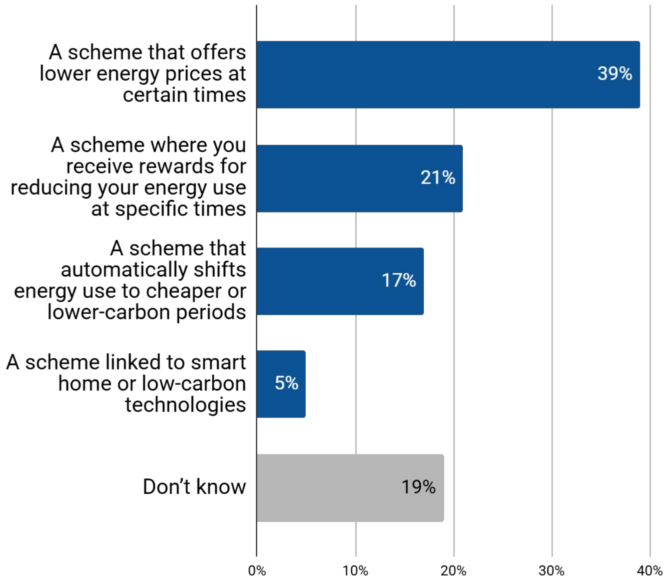


Persuadables

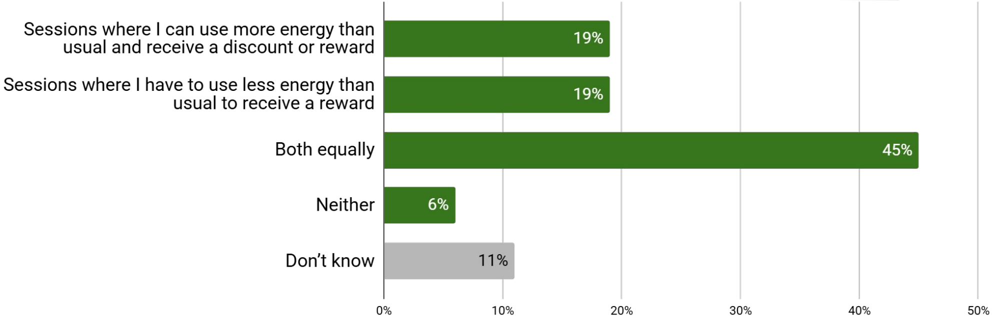
Average saving needed to ensure uptake: **£12.70**	**£11.20**	**£11.90**	**£12.50**
Share who would participate for £3.65: **31%**	**39%**	**38%**	**32%**
Share who would participate: **86%**	**98%**	**88%**	**84%**

Once engaged with the idea of flexibility schemes, the public are open to different models, with schemes that offer lower energy prices at given times proving most appealing

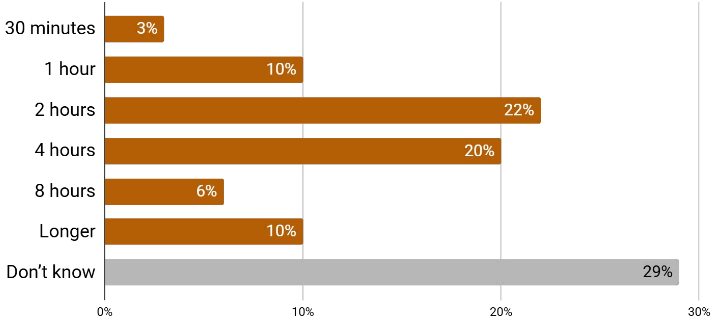
Which of the following types of energy-saving or flexibility scheme would you be most likely to take part in?



If you were to take part in an energy-saving or flexibility scheme, which type of session would you prefer to take part in?

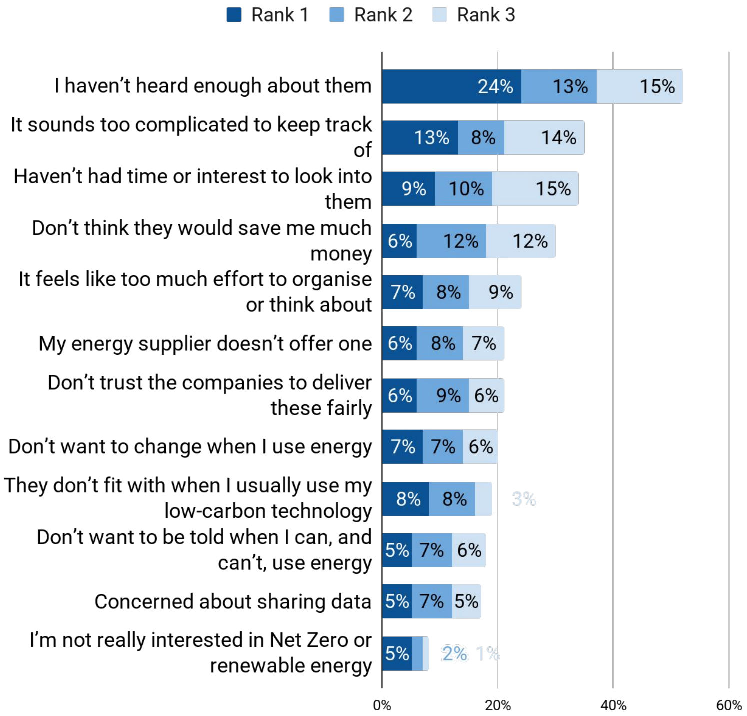


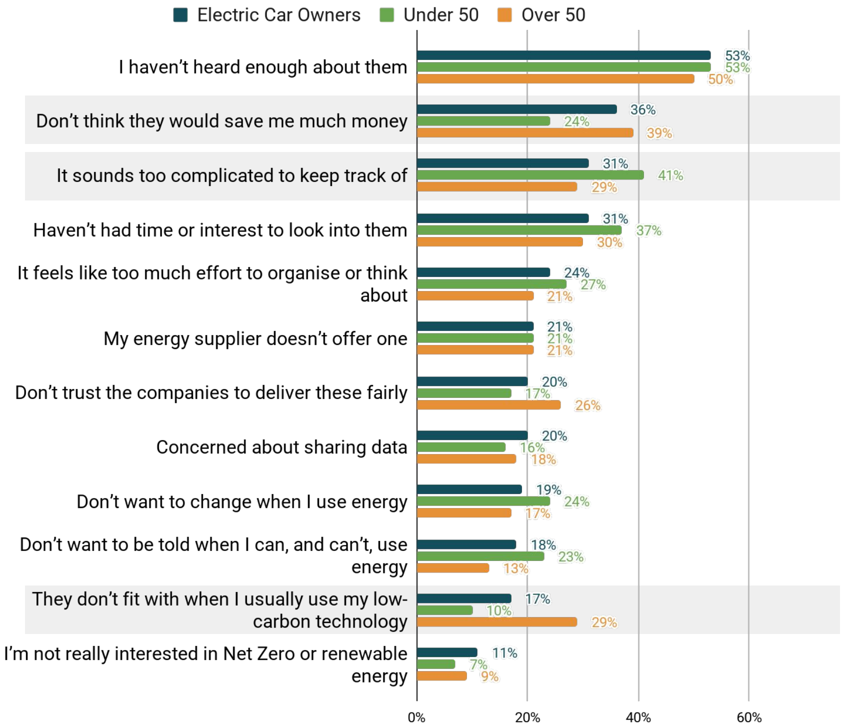
If you were to take part in an energy-saving or flexibility scheme, how long do you think you could change your energy usage for?



Low-carbon technology users report similar barriers, but concerns about schemes being complicated are more pronounced, particularly among younger users

You said you don't currently use any "low-carbon technology" energy-saving or flexibility schemes... Which of the following best describes why you do not take part in them? Please rank the top 3 reasons

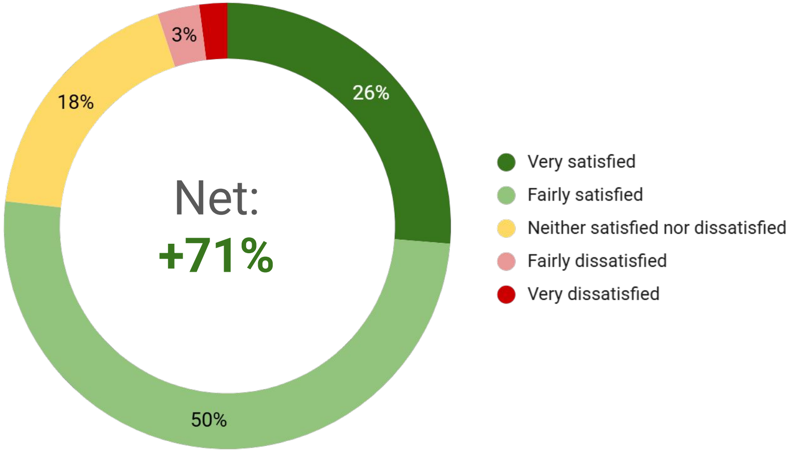




Perceptions of flexibility schemes among users

Satisfaction with flexibility schemes is very high overall, but those saving energy to reduce bills are less satisfied than those motivated by environmental impact

Thinking about the energy-saving or flexibility scheme you take part in… How satisfied are you with the scheme overall?



People using low-carbon technologies, and younger participants more generally, tend to be happier with the flexibility scheme they're on.

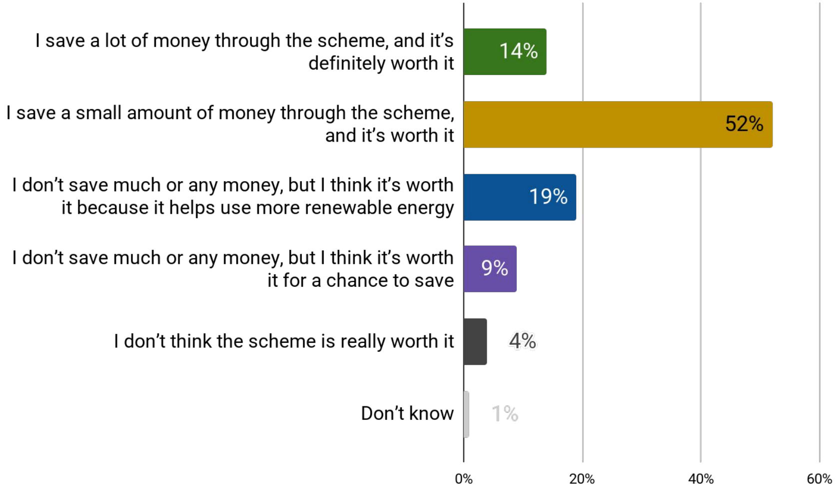
What's particularly striking is the role of motivation: those taking part to help the environment are much more satisfied than those doing it purely to save money. This suggests that, at present, financial incentives alone may not be strong enough to drive the same level of satisfaction as environmental motivations.

85% Heat pump owners	**75%** EV Owners	**69%** No Degree
85% Save energy to help environment	**74%** British Gas	**69%** £150+*
84% Home Battery Storage Owners	**72%** £0-£50*	**69%** 35-64
80% 18-34	**72%** £51-£100*	**68%** Save energy to save money on bills
79% Scottish Power	**71%** £100-£150*	**66%** E.ON Next†
76% Degree	**70%** Octopus Energy	**59%** EDF Energy†
76% Low-Carbon Tech Owners	**69%** 65+	**58%** OVO Energy†

* To the best of your knowledge, how much do you currently spend each month on electricity?
†Smaller sample sizes, some caution on interpretation

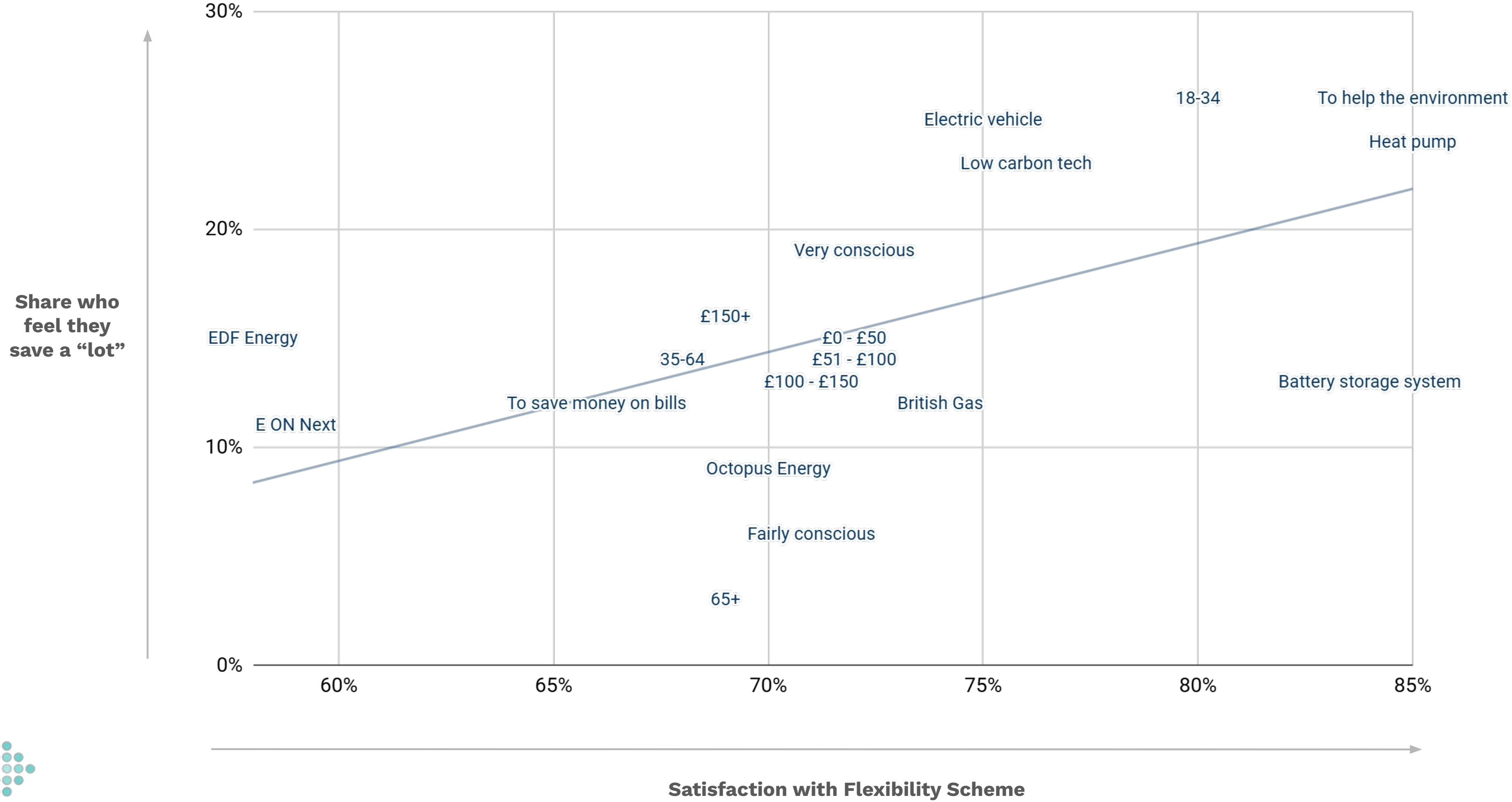
This may be because most don't feel they save a "lot" of money through flexibility schemes

Still thinking about the energy-saving or flexibility scheme you take part in... Which of the following comes closest to your view, even if none matches your view entirely?

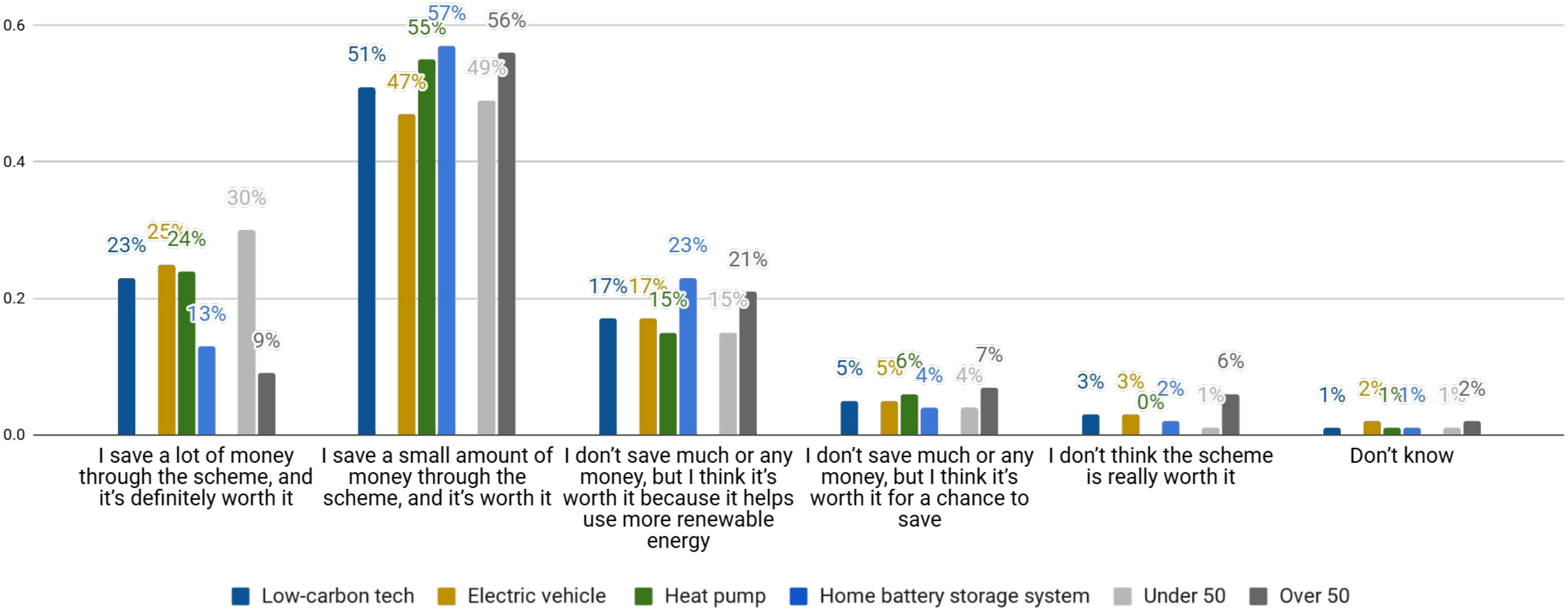


Save to save on bills	Save a lot of money	12%
	Save a small amount of money	51%
	Don't save much or any money, worth it for more renewable energy	18%
Save to save energy	Save a lot of money	26%
	Save a small amount of money	51%
	Don't save much or any money, worth it for more renewable energy	22%

Though perceptions of savings aren't the only factor in satisfaction with a scheme

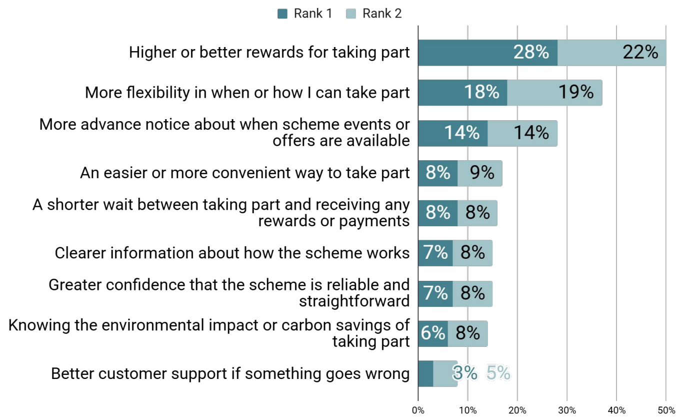


Low-Carbon Tech users, particularly younger users, are more likely to think flexibility saves them a “lot” of money



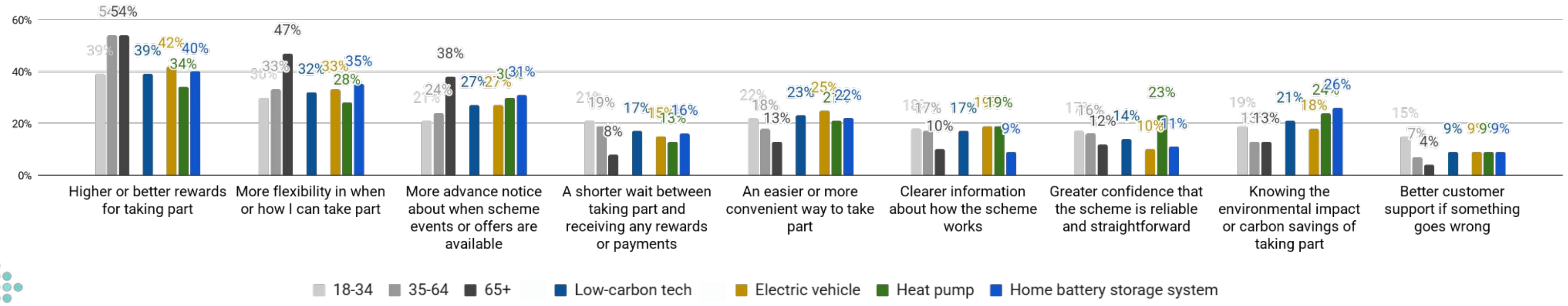
Improved rewards are the strongest lever to increase use of flexibility schemes, though many also want more notice and greater control over timing

Still thinking about the energy-saving or flexibility scheme you take part in... Which of the following would make you more likely to use this scheme more often? Please rank the top two options



Improved rewards are most likely to encourage users to access flexibility schemes more often, followed by greater flexibility in when they can be used and longer notice periods.

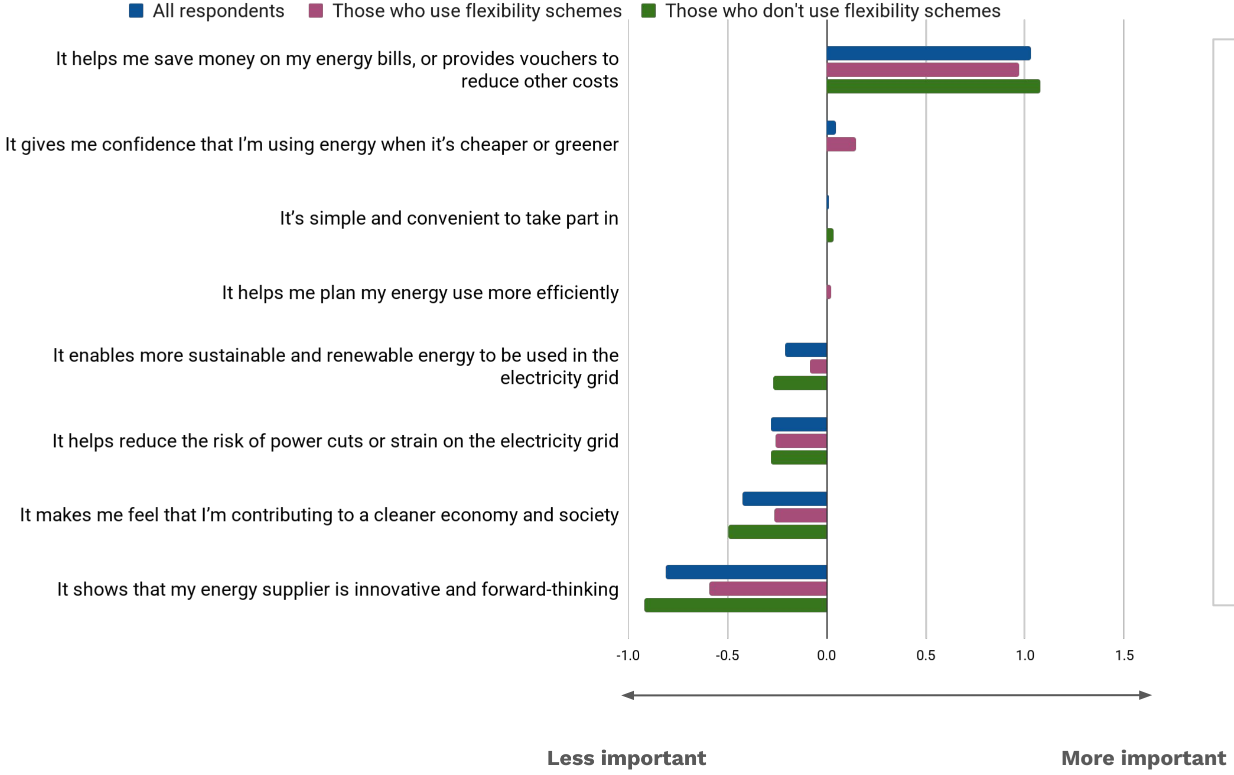
Older respondents tend to be more swayed by direct changes (greater rewards, increased flexibility in timings), while younger respondents are more likely to want better customer service, faster payments and more information about the environmental impact.



Messaging around Flexibility schemes

Messaging around flexibility should always focus on the potential for savings, with environmental benefits a secondary argument

Which of the following do you think are the most important and least important aspects when considering whether to take part in an energy-saving or flexibility scheme?



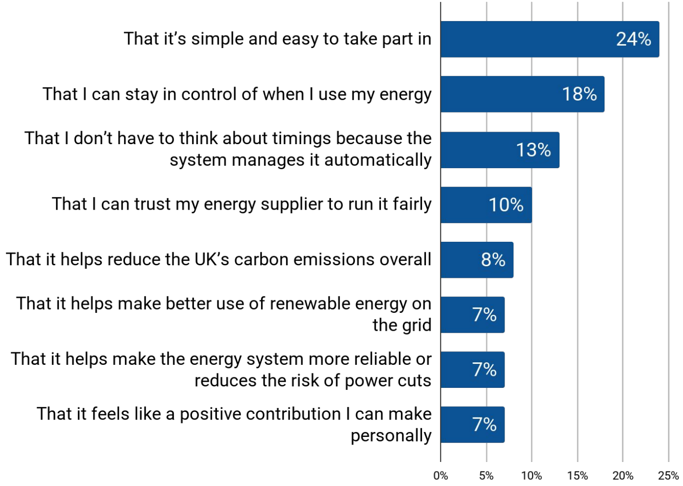
The ability to save money is the key message that will drive the public into taking part in flexibility schemes.

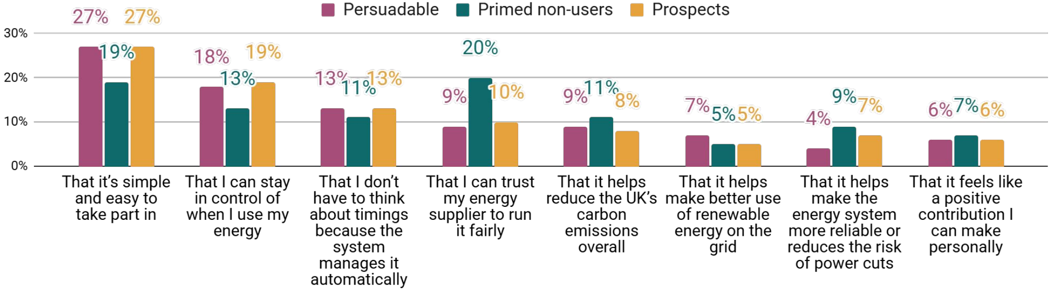
Societal benefits and messaging around energy suppliers' role in the system are less likely to increase usage.

Ordering of these messages differs little across users and non-users of flexibility schemes.

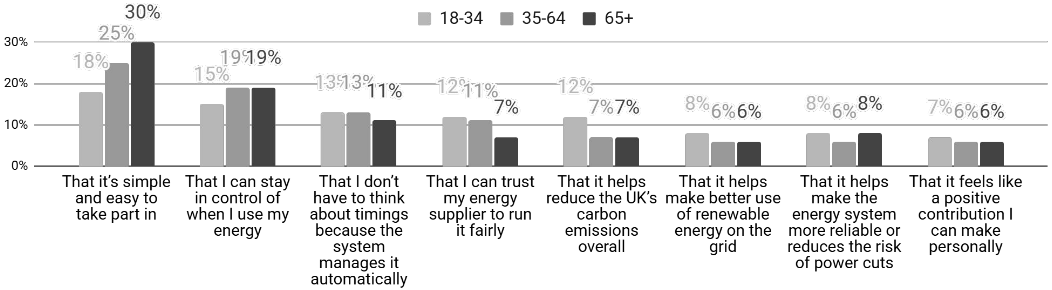
When cost savings are excluded, messaging should focus on ease of use and reassure customers that they are not losing control of their energy use

Still thinking about energy-saving schemes... Putting any potential savings to one side, which of the following would be most important to you when deciding whether to take part?





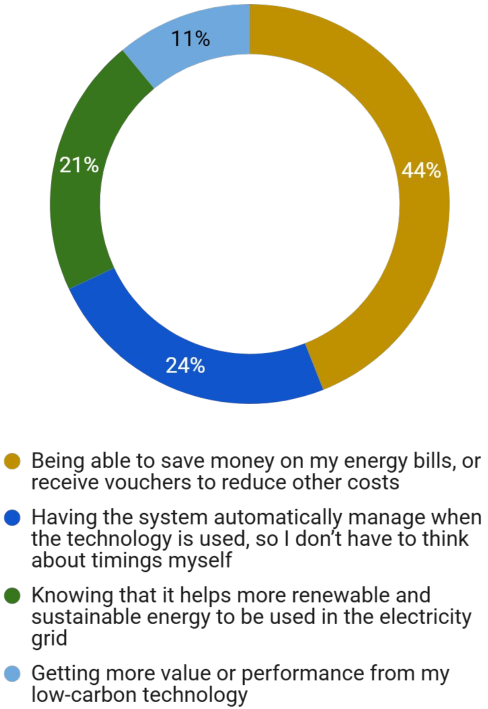
Messaging to **Persuadables** and **Prospects** should focus on ease of use and agency over energy use, while messaging to **Primed non-users** should reassure them that schemes will be run fairly.

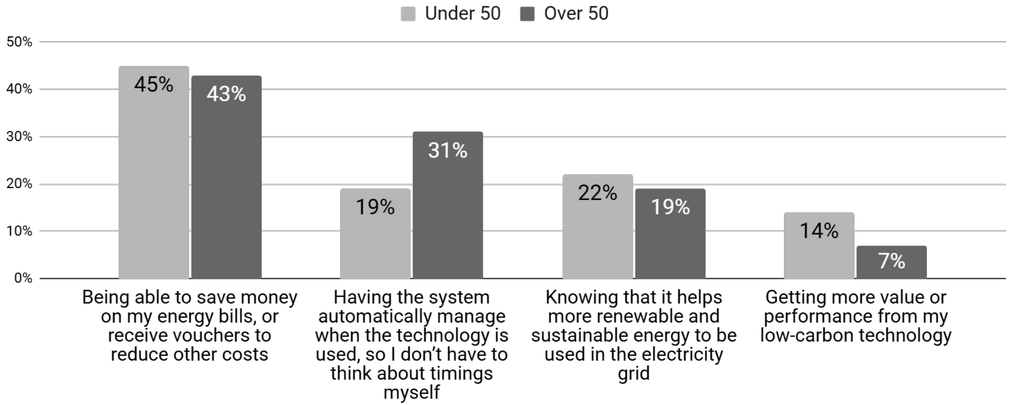


Ease of use is much more important to older customers, while younger groups care more about environmental impacts.

Similarly, cost savings are the most important message for Low-Carbon Technology users

Thinking specifically about energy-saving or flexibility schemes that you might use with “low-carbon technology”... Which of the following do you think is most important when considering whether to take part?





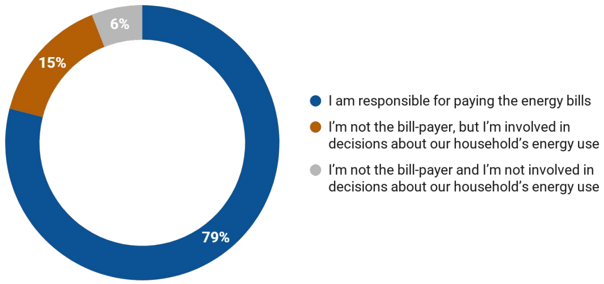
Methodology and sample composition

Methodological detail

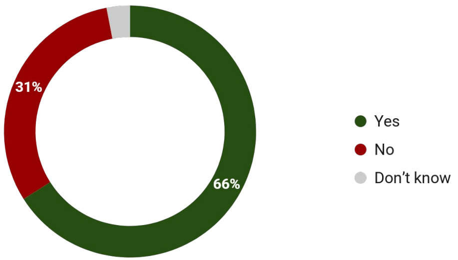
- Stack polled 2,511 respondents who live within SPEN DSO coverage area between 19th November and 10th December 2025.
- We collected boosted subsamples of electric vehicle owners (280) and heat pump (138) users within this broader sample.
- Responses are weighted to be representative of the SPEN DSO coverage area by age, gender, education, and 2024 general election vote.

Sample composition: energy profile of respondents

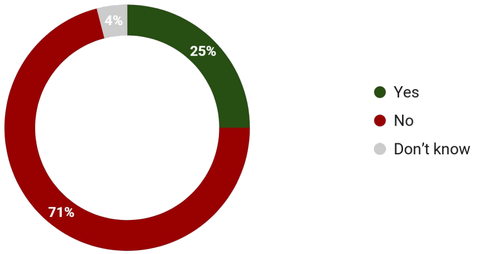
Which of the following best describes your involvement with energy bills in your household?



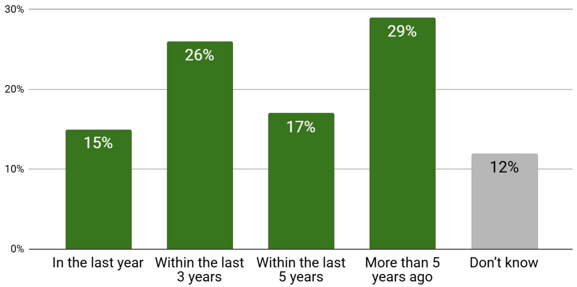
Do you currently have a smart electricity meter in your home?



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?