

BMG
an RSK company

Consumer Impacts of Market Conditions Survey

Technical Report –

Fieldwork February/March 2026

Prepared by BMG for Ofgem

ofgem

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Context and objectives

The Consumer Impacts of Market Conditions Survey is designed to provide Ofgem, and the wider energy sector, with a good understanding of domestic consumers' experiences of and attitudes towards the energy market. The survey covers issues such as the impact of rising energy bills on households, awareness of available support, and the impacts of market conditions on energy market engagement.

The purpose of the research is to monitor the areas below:

- **Affordability:** What impacts have rising energy costs had on consumers?
- **Sources of support:** Are consumers aware of sources of support?
- **Consumer energy literacy:** How do consumers understand payment methods, tariffs and standing charges?
- **Trust and awareness:** What are consumers' levels of trust in, and awareness of, organisations in the energy market?
- **Engagement:** How engaged are consumers with the energy market, and what are the barriers to and motivations for comparing deals and switching?
- And how do these vary across different groups of consumers, and how have they changed over time?

Reports and data tables for the previous wave can be found here.

Overview of approach

Fieldwork for this wave (wave 7) was conducted from **18 February to 16 March 2026**. This marks the second wave in a row with a twelve month interval since the previous wave. Prior to wave 6, waves were conducted roughly 6 months apart.

The previous waves were conducted in:

- Wave 6: 17 January to 7 February 2025
- Wave 5: 12 January to 1 February 2024
- Wave 4: 3 to 20 July 2023
- Wave 3: 21 November to 11 December 2022
- Wave 2: 4 to 31 July 2022
- Wave 1: 18 to 31 March 2022

Fieldwork was undertaken using three approaches:

1. Online surveys via online panels to capture the digitally enabled general population

2. Online river sampling to capture those digitally enabled but less present on panels[1]
3. Face-to-face interviews to ensure the inclusion of digitally excluded consumers. Waves 1 to 4 also included an element of telephone interviewing, which was discontinued for wave 5 (see page 11 for more detail).

Quotas were set to ensure a representative sample of the GB population for gender, age, region, Index of Multiple Deprivation (IMD)[2] and ethnicity. While these were broadly achieved within the sample, any discrepancies are addressed through weighting, which uses the same proportions. Targets were taken from a combination of 2023 mid-year estimates, 2021 Census and 2019 Official Index of Multiple Deprivation[3], using the same approach as the wave 6 survey.

Targets and weights will be reviewed ahead of the next wave to reflect the latest population estimates.

Wave 7 comprised **4,460** interviews in total: 4,047 online panel, 211 online river sample, and 202 face-to-face.

A sample size of this magnitude carries a maximum margin of error of ±1.47% at the 95% confidence level.[4]

This is a large total sample size compared to previous waves. For example, the wave 6 total sample was 3,458. The larger sample size was to facilitate Ofgem's data linking, which is explained below.

Online panel changes

For wave 7, Ofgem wanted to explore the potential for linking survey responses to consented smart meter consumption data (see further details below). To enable this, BMG identified Norstat as an alternative panel provider that was able to facilitate this exercise.

To assess how changing panel provider affected the survey results, BMG conducted two parallel surveys: one using the original Savanta panel (n=2,000) and one using Norstat (n=4,000). Comparing the data from the two panels identified some differences in metrics and the makeup of the respondent base, mainly around financial circumstances, affordability, and in the profile of respondents, such as socio-economic grade and tenure. The Norstat panel tended to skew slightly more affluent than the Savanta panel. Both samples were weighted to the same population profile, which corrects for some of these differences. See figure 1 below:

[1] River sampling is an online sampling method that recruits respondents who are not panel members by inviting them to the survey while they are completing another online activity. It allows us to reach people who, for whatever reason, would not join a panel to take surveys regularly. Using this approach helps attract a broader spread of online users.

[2] The Index of Multiple Deprivation (IMD) is a measure used to assess levels of deprivation across different areas. It combines multiple factors—including income, employment, health, education, crime, housing, and living environment—to rank areas from most to least deprived.

[3] IMD targets were calculated based on the ONS release for 2019 in England and 2016 for Scotland (LSOA level data).

[4] A 95% confidence level strikes a balance between being precise and offering a high level of certainty. A 95% confidence interval means that if we were to repeat the study multiple times, 95% of the time, the true population parameter would fall within the calculated interval. This is a commonly accepted level of confidence in social research.

Figure 1: Panel respondents comparison for socio-economic grade and tenure

Norstat

Socio Economic Grade	%
AB	39%
C1	25%
C2	12%
DE	22%

Savanta

Socio Economic Grade	%
AB	34%
C1	20%
C2	15%
DE	30%

Norstat

Tenure	%
Bought on a mortgage	25%
Owned outright by household	41%
Rented from Local Authority	7%
Rented from Housing Association/Trust	9%
Rented from private landlord	15%
Shared ownership (part owned and part rented)	1%
Living rent free	1%

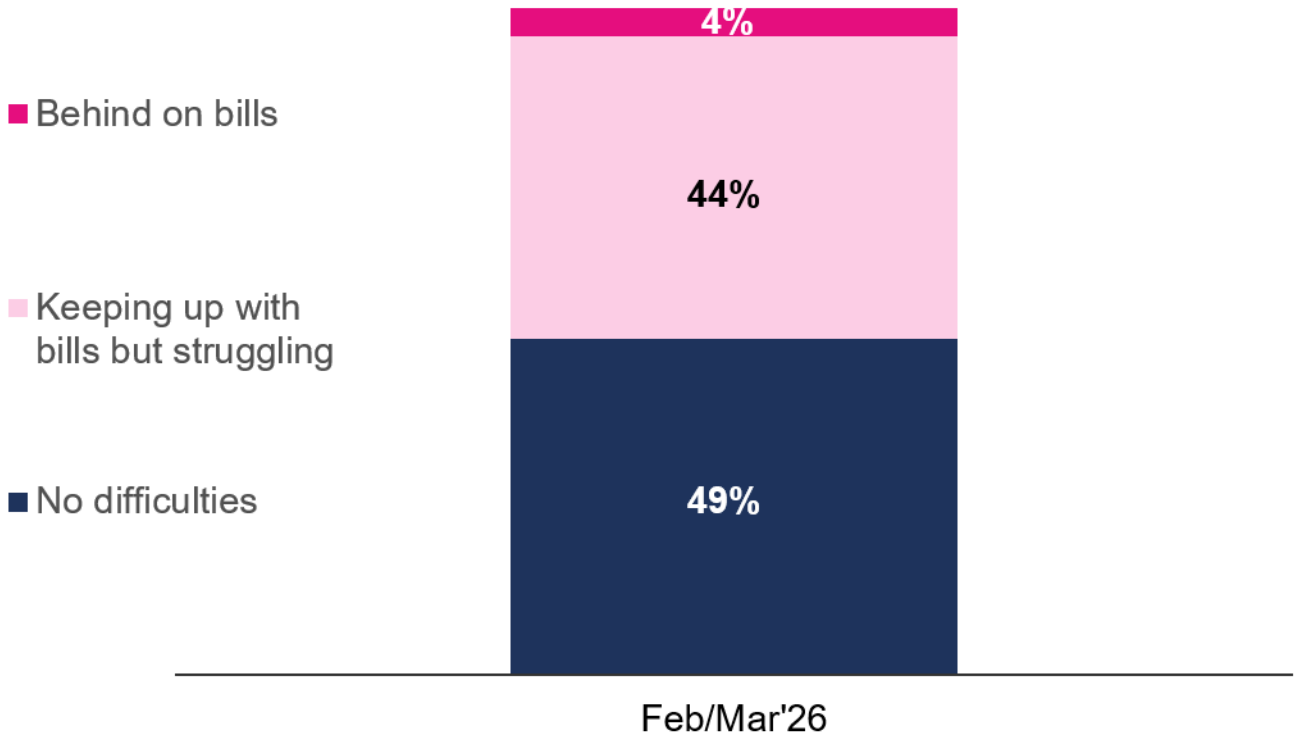
Savanta

Tenure	%
Bought on a mortgage	22%
Owned outright by household	33%
Rented from Local Authority	10%
Rented from Housing Association/Trust	12%
Rented from private landlord	20%
Shared ownership (part owned and part rented)	1%
Living rent free	1%

Figure 1 shows that for socio economic grade, a higher proportion of Norstat respondents fall into the AB (most affluent) social grade (39% compared to 34% for Savanta) and fewer in the DE (least affluent) social grade (22% compared to 30% for Savanta). For tenure, more Norstat respondents reported being homeowners, particularly owning their home outright (41% compared to 33% for Savanta).

Having weighed up the loss of trend continuity due to the differences described above against the benefits of enabling data linking, Ofgem took the decision to move to the Norstat panel for wave 7. Although two parallel surveys were run, one for each panel provider, all wave 7 data in the report is from the Norstat panel.

Figure 2: No trend shown example



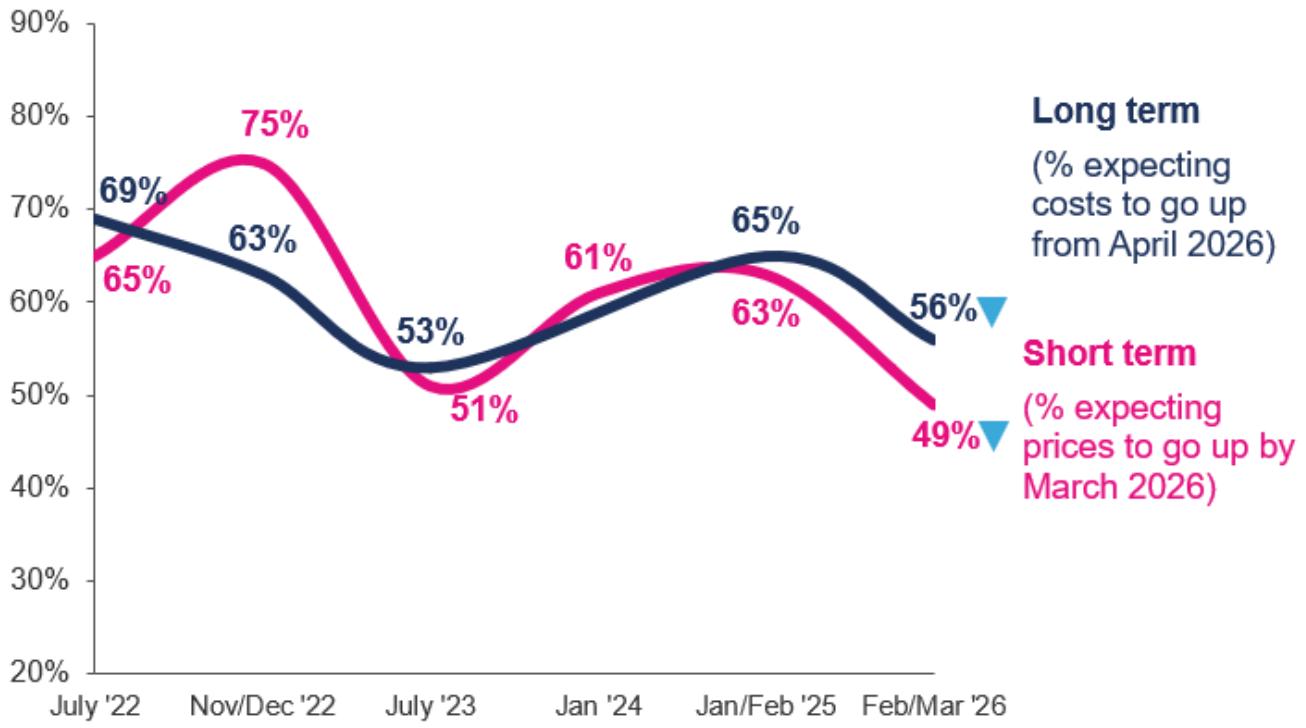
F5: Which one of the following statements best describes how well you are keeping up with your general household bills and credit commitments at the moment? Base: All respondents (4,460 in W7). No comparison to the previous wave due to break in trend. For previous trends, click here for the wave 6 report.

Comparative Savanta data: No difficulties (40%); Keeping up but struggling (45%); Behind on bills (9%).

For cases where the comparison with the Savanta panel data showed a notable difference with the Norstat data, such as the wave 7 trend showing a statistically significant change from wave 6 in one panel, but not the other, then this metric is not trended in the report. See example in Figure 2f.

As shown in Figure 2 , this metric has not been trended due to the differences observed between the new Norstat data and the comparative Savanta data. The footer of the figure provides a link to the wave 6 report so readers can access historic trends for these metrics. The footer also provides the comparative Savanta data for reference.

Figure 3: Trend continuity example



E10: Looking forward, what do you think will happen to your household's energy costs across the following time periods? Base: All respondents: Jul '22 (W2) 3,560 / Dec '22 (W3) 3,457 / Jul '23 (W4) 3,434 / Jan '24 (W5) 3,439 / Jan/Feb '25 (W6) 3,458 / Feb/Mar '26 (W7) 4,460. Note that the length and seasons covered by time frames vary in each wave due to changing fieldwork timings. Statistical significance versus previous wave at 95% confidence.

Comparative Savanta data is as follows: Long term (52%); Short term (48%).

For cases where the Norstat and comparative Savanta data reported similar figures, such as showing the same statistically significant trend compared to the wave 6 data, or showing no statistically significant difference from each other, trend data has been retained in the report.

As shown in Figure 3, for these cases, the trend is reported and statistical significance is tested as normal.

Linking survey responses to smart meter consumption data

This programme has provided Ofgem with insights on the public's perceptions, understanding of and engagement with the UK energy market. However, one of the findings that has emerged is around the public's lack of awareness about their own energy use and tariff type. This appears to lead to over-claim on metrics like tariff type. For example, in the wave 7 report, 35% claim to be on a tariff where they pay different amounts for their energy, while official figures place this at 16%.[5]

In order to bridge this gap, Ofgem asked BMG to explore the possibility of linking consumption data from those respondents on a smart meter with their survey responses to ascertain, with a greater degree of confidence, if perceptions of the energy market differ between households with different levels of energy use or tariff types.

BMG engaged with online panel partners and energy data providers to determine the feasibility of this linkage.

Norstat is an online panel provider that could facilitate the process of recruiting respondents to the exercise. N3rgy, an organisation that provides smart meter solutions to the wider energy sector, facilitated linking survey responses to electricity consumption data for the previous 13 months.

In order to collect the information necessary to facilitate the exercise, key information was required from the respondent:

- A smart meter registered at a verified address
- Consent to link their survey responses to consumption data
- The length of time the respondent has lived in the property

To collect this, BMG, Ofgem, Norstat and N3rgy added new questions to the end of the existing questionnaire (see Appendix B) to gather their consent, full address, and length of occupancy from respondents who were willing and eligible to take part. A follow up letter was then sent to confirm that the address provided in the survey was correct. Provided BMG were able to demonstrate that GDPR compliance was in place and consent for data sharing had been obtained, N3rgy then provided smart meter data via a csv file directly to BMG. Consumption data could then be appended to survey data and cross-analysed with survey responses. No personally identifiable information was provided back to Ofgem.

The full approach to the questions used in this section can be seen in Appendix B.

Questionnaire design

Questionnaires were developed by BMG based on Ofgem's research objectives and shared with Ofgem for sign-off. In every wave the process was iterative, with BMG making agreed amendments to the questionnaire based on feedback and input from Ofgem stakeholders.

New topics were introduced to the survey for this wave, including:

- Time-of-use tariffs and willingness to shift energy use to off-peak times
- Awareness and knowledge of DNOs and GDNs
- Barriers to looking for new deals (reintroduced)

[5] Ofgem Flexibility and Net Zero survey published in May 2026 reports the proportion of households on a time of use tariff at 16%. Reasons for why there is overclaim in the survey are explored in the main report.

- Acquisition tariffs and who suppliers should offer better deals to

Sampling approach

The sample was designed to be representative of Great Britain's population. Screening questions ensured participants met all of the following criteria:

- Aged 16 or above
- Residents of Great Britain, verified by their postcode
- Have mains gas or electricity in their home
- Solely or jointly responsible for their household's energy bills

As outlined in the overview of approach section above, the survey sample consists of three methods: online panel, river sampling, and face-to-face interviews. Each of these methods required slightly different approaches, each of which is detailed below.

Online panel quotas

Quotas and weights were set for age, gender, region, IMD and ethnicity. This is consistent with the quotas and weights approach for wave 6.

A full breakdown of targets alongside the achieved sample composition is provided below. Note that these quotas were applied for the online panel element only, with a tolerance of 20% applied within most cells, with the exception of ethnicity targets, to ensure quotas did not become too restrictive.

A separate sampling strategy was used for the small component of face-to-face interviews with digitally excluded respondents (approach outlined later in this report). However, so that the final achieved composition is clear, the achieved percentages cited below include those collected face-to-face in addition to those achieved online via panel and the river approach.

Formal quotas are not possible on river sampling as participation is voluntary through email. However, the sample is ordered proportionately based on the online quotas. Again, for completeness, the achieved percentages set out below include those collected via river sampling.

Age (2023 mid-year estimates, ONS)	Target (%)	Achieved across all components (%)
16-34	29%	30%
35-64	48%	43%
65+	23%	27%

Gender (2023 mid-year estimates, ONS)	Target (%)	Achieved across all components (%)[6]
Male	48%	51%
Female	52%	49%

Region (2023 mid-year estimates, ONS)	Target (%)	Achieved across all components (%)
North East	4%	4%
North West	11%	12%
Yorkshire and the Humber	8%	8%
East Midlands	7%	7%
West Midlands	9%	9%
East	10%	10%
London	14%	14%
South East	14%	13%
South West	9%	10%
Wales	5%	5%
Scotland	9%	9%

IMD (2019 Official Index of Multiple Deprivation, MHCLG)	Target (%)	Achieved across all components (%)[7]
1st quintile – Least deprived	20%	17%

[6] A small number selected non-binary and prefer not to say.
[7] The achieved numbers are more skewed for IMD relative to the target, partly due to the tolerance around quotas but also because the face-to-face CASI approach targeted areas with higher deprivation (which correlate with digital exclusion). Deprivation is used in the Low Connectivity Index to help identify respondents more likely to be digitally excluded.

2nd	20%	20%
3rd	20%	21%
4th	20%	21%
5th quintile – Most deprived	20%	21%

Ethnicity (2021 census, ONS)	Target (%)	Achieved across all components (%)
White	82%	85%
Ethnic Minority	18%	14%

Face-to-face quotas

As outlined above, the face-to-face approach was included as a route to reach digitally excluded respondents. The approach uses Computer-Assisted Self-Interviewing (CASI). Here, the interviewer completes some of the initial screening questions with the respondent and then hands over the survey device to respondents to self-complete the rest of the questionnaire.[8] This is quicker to administer and mirrors the self-complete methodology for online interviews.

It uses screening criteria to ensure it reaches digitally excluded respondents. While this represented a change from the telephone approach used previously, all respondents went through the same digital exclusion screeners as in previous waves. To qualify, digitally excluded respondents had to fall into at least one of the following categories[9]:

- No access to the internet
- Access to the internet but not confident using it
- Only use the internet for email, browsing, news or social media

To ensure sample consistency, the following age and gender targets were based on the composition by age and gender achieved in previous waves of the CIM programme.

Age and gender	Target range (min-max)	Achieved in wave 7 via face-to-face fieldwork
16-34	2% - 10%	6%

[8] Exceptions were made where respondents were less comfortable using a tablet device or needed support for accessibility-related reasons. In these instances, the interviewer led the interview.
[9] This is broadly based on research from Ofcom - Digital Exclusion Review (see page 5-7) and Adults' Media Use and Attitudes report 2022 (ofcom.org.uk) (see page 9).

35-64	15% - 30%	24%
65+	60% - 85%	70%
Male	40% - 60%	47%
Female	40% - 60%	53%

A regional sampling point selection strategy was also created to ensure a spread of interviews across Great Britain, with a total of 10 sampling points selected. Each area consisted of a small cluster of Lower Layer Super Output Areas (LSOAs) in different regions of the country, each of which scores highly on BMG's Low Connectivity Index. The index identifies on average, older and more deprived localities (two variables highly predictive of digital exclusion).

In each area, approximately 20 interviews were conducted, ensuring a broadly proportionate regional mix, with coverage in Scotland, Wales, and different regions of England. See the breakdown below:

Region	% of population	Sampling points selected	Target interviews	Achieved interviews
South total (inc. London, South East, South West, East)	46%	4	80	80
Midlands total (East Midlands, West Midlands)	17%	2	40	42
North total (inc. North East, North West, Yorks & Humber)	24%	2	40	41
Scotland	9%	1	20	20
Wales	5%	1	20	19

Fieldwork process

The survey was soft-launched on 18 February, with the early survey completes extracted and reviewed to 'sense-check' the data. These checks included ensuring that the number of valid responses was being correctly recorded and checking the survey logic and routing were working as intended. Once everything was confirmed as working, the survey was fully launched on 19 February.

Weighting

The sample was weighted using the target percentages set out above in the sampling approach section for age, gender, region, IMD and Ethnicity.

Please note that this programme uses targets for the 16+ population of Great Britain, including data on age. In contrast, the Energy Satisfaction Survey - another survey commissioned by Ofgem and Citizens Advice - uses data on the household reference person, including their age. The household reference person is the member of the household in whose name the accommodation is owned or rented or is otherwise responsible for the accommodation. In households with a sole householder, that person is the household reference person. This difference in data collection means that the sample for the CIM report typically has a slightly younger profile.

The effective sample size helps assess the impact of the weights on the unweighted sample. The effective sample size is a measure of the precision of the sampling approach and the efficiency of the weights. In essence, it helps estimate confidence in accuracy of the survey results by accounting for potential biases and uncertainties introduced by weighting factors. The overall effective sample size was 97%.

Essentially, this means that the weighted sample behaves as if it were 97% as large as the unweighted sample in terms of its capacity to produce accurate and unbiased estimates. This indicates that the weighting adjustments, while necessary to ensure the sample accurately represents the broader population, have only marginally reduced the sample's statistical efficiency; and suggests that the sample selection process is working well in how representative it is of the GB population.

Quality checks

To maintain the highest data quality, we have implemented several checks. These include questions designed to identify and filter out respondents who rush through surveys (speeders'), with additional steps to remove such responses post-survey.

The average survey times for those taking part in this survey were as follows:

- Online interviews took on average 16 minutes to complete
- CASI interviews took on average 18 minutes to complete

The survey also incorporated postcode validation checks to verify respondents' locations. The panel component also uses a well-established, high-quality panel partner to help ensure the integrity of our data.

Other checks conducted on the panel component included verbatim checks, concentration checks, and engagement validation.

Our commitment to quality extends to our data-checking process. We meticulously review our data tables, focusing on verifying the application of weights, the accuracy and consistency of cross-break creation, and the correct application of significance testing. These steps ensure that our findings are not only accurate but also meaningful and reliable for decision-making.

No data entry phase was required for this survey. The programmed script ensured that all question routing was performed automatically, and no post-editing of the data was required in the way that might be necessary for surveys administered using a 'pencil and paper' method.

Reporting

The data table outputs for this survey use several research terms to describe who is included in the outputs for each survey question. The definitions for these are as follows:

- Unweighted Total: The raw count of all of those who were asked the question as part of the survey

- Effective Sample Size: The sample size of the data, after weighting factors have been applied. It is a statistical concept that reflects the representativeness of the data collected.
- Base, All Respondents: The count of those who were asked the question after weight factors have been applied.

Statistical significance

Given that the survey uses quotas rather than random probability sampling, statistical significance is indicative only[10].

Where significant differences between sub-groups and the total sample are identified, 'total sample' represents the total sample minus the sub-group in question.

Significant differences in reporting are calculated at a 95% confidence level and shown on charts throughout the report with the use of an up ▲ or down ▼ arrow. Only where a difference is statistically significant is it discussed in the analysis of the report.

In the associated data tables for this wave, significant differences against the total at the 95% confidence level are marked using '+' (significantly higher) and '-' (significantly lower).

Significant differences between variables are shown using alphabetical letters. These letters correspond to the column names at the top of each table. Where an alphabetical letter is shown, this column is significantly higher than the corresponding column shown by the letter.

Statistical tests run on the data outputs are as follows:

- Two-sided paired T-Test for means (the formula for which is shown below):

$$\bar{x}_1 = \frac{\sum_{i=1}^{n_1} x_{1i}}{n_1}, \quad \bar{x}_2 = \frac{\sum_{i=1}^{n_2} x_{2i}}{n_2}$$

- Two-sided paired Z-Test for percentages (the formula for which is shown below):

$$c = \frac{\sum_{i=1}^{n_0} (x_{1i} - p_{10})(x_{2i} - p_{20})}{n_0}$$

$$= \frac{\sum_{i=1}^{n_0} x_{1i} x_{2i} - n_0 p_{10} p_{20}}{n_0}$$

Financial Vulnerability Classification

In the previous wave (Wave 6) we introduced a summary metric of a respondent's financial vulnerability. This is based on the combination of three metrics – ability to save, accumulation of debt and ability to cover unexpected expenses. The resulting score indicates financial vulnerability as follows:

[10] "Indicative" means that the statistical significance is suggestive rather than definitive. Since the survey uses quotas instead of random probability sampling, the results approximate trends rather than providing a fully representative, statistically rigorous conclusion. Quota sampling selects participants based on specific demographic quotas, ensuring diversity but not full randomness, while random probability sampling gives everyone an equal chance of selection, making results more statistically representative.

- **highly financially vulnerable –** those not able to save, and who cannot afford an unexpected but necessary expense of £900 and who are borrowing more than usual
- **financially vulnerable –** those not able to save, who either cannot afford an unexpected expense of £900 or are borrowing more than usual
- **getting by –** those who expect to save or can afford an unexpected expense of £900, who are not borrowing more than usual
- **doing well –** those who expect to save in the next 12 months, can afford an unexpected £900 expense, and who are not borrowing more than usual

In wave 7, in order to reflect increases in CPI, respondents were asked if they could afford an unexpected expense of £900, whereas in wave 6 the amount was £850.

Appendix A: Questionnaire

Survey introductions

ONLINE INTRO

Thank you for agreeing to take part in this survey.

We would now like to ask you some questions about your gas and electricity on behalf of Ofgem. Ofgem is Great Britain's energy regulator, and its main objective is to protect the interests of both current and future consumers. By understanding your views Ofgem will be better placed to meet its objective.

BMG has been commissioned by Ofgem to carry out this research.

Please remember to read all questions carefully. The survey takes around 15-25 minutes to complete on average and we have allowed time for you to consider your responses.

In this survey, there will be some questions about yourself and your household to make sure we are getting feedback from a cross section of people. A "Prefer not to answer" option will be available for you to select, if you wish to use it.

Your responses will be treated in the strictest confidence. BMG Research abides by the Market Research Society Code of Conduct at all times.

You can find out more information about our surveys and what we do with the information we collect in our Privacy Notice which is here www.bmgresearch.com/privacy

Under General Data Protection Regulation (GDPR), (which protects how your data is stored and used) we need your permission to use the survey results on certain topics.

By clicking the next button, you agree to participate in the survey and for BMG to process all information collected.

Participation is completely voluntary and you may withdraw your consent at any time. Your survey answers will be combined with the answers from all other participants and used for market research reporting, and your personal data will be held for no longer than 24 months.

Base: Online only

SINGLE RESPONSE

Q1. Do you agree to take part in this survey?

Please select only one

Code	Answer list	Scripting notes
1	Yes, I agree	
2	No, I do not agree	**SCREENOUT**

CAPI INTRO

Good morning \ afternoon, my name is **[NAME]** and I'm from BMG Research. BMG Research is an independent research company undertaking the survey on behalf of Ofgem.

We would like to ask you some questions about your gas and electricity on behalf of Ofgem. Ofgem is Great Britain's energy regulator.

In this survey, there will be some questions about yourself and your household to make sure we are getting feedback from a cross section of people. A "Prefer not to answer" option will be available for you to select, if you wish to use it.

The survey will take between 15 and 25 minutes to complete depending on your answers.

Your responses will be treated in the strictest confidence and you won't be identified in any information we pass on to Ofgem. BMG Research abides by the Market Research Society Code of Conduct and strict data protection rules at all times.

You can find out more information about our surveys and what we do with the information we collect in our Privacy Notice which is on our website www.bmgresearch.com/privacy or on the privacy leaflet provided.

IF RESPONDENT REQUIRES FURTHER CLARIFICATION THAT BMG RESEARCH IS A GENUINE MARKET RESEARCH COMPANY, THEY CAN CALL MRS ON 0800 975 9596.

INTERVIEWER NOTE: RESPONDENT MUST BE AGED 16 OR OVER

Obtaining Informed Consent

INTERVIEWER CHECK – Are you willing to take part in the survey? *[book appointment if not convenient now]*

IF NO Thank and Close

IF YES CONTINUE

I need to record that you are happy to participate, and this one question only is recorded. This is for quality control purposes and won't be shared with anyone outside of BMG Research.

Can I confirm that you are happy to participate in the survey and to the use of your data for the purposes outlined?

Please ask the respondent to read out as follows "I agree to take part in the survey".

Screening & Profiling (Section S)

FOR CAPI

Base: All respondents

SINGLE RESPONSE

QDE1. Do you have access to the internet either at home or at work or at some other location?

Please select only one

Code	Answer list	Scripting notes
1	Yes	
2	No	**DIGITALLY EXCLUDED IF CHOSEN**
97	Unsure	***DO NOT READ OUT***
98	Prefer not to answer	***DO NOT READ OUT***

FOR CAPI AND RIVER SAMPLE ONLY (ASK AFTER A7 FOR RIVER)

Base: All CAPI who have access to the internet or are unsure (QDE1 = 1, 3, 97), All river sample

SINGLE RESPONSE

QDE2. Overall, how confident are you as an internet user?

Please select only one

Code	Answer list	Scripting notes
1	Not at all confident	**DIGITALLY EXCLUDED IF CHOSEN**
2	Not very confident	**DIGITALLY EXCLUDED IF CHOSEN**
3	Neither confident nor unconfident	
4	Fairly confident	
5	Very confident	
97	Don't know	
98	Prefer not to answer	

FOR CAPI AND RIVER SAMPLE ONLY (ASK AFTER QDE2 FOR RIVER (AFTER A7))

Base: All CAPI and who have some confidence as an internet user (QDE2 = 3-5, 97, 98), All river sample

MULTI RESPONSE

QDE3. Thinking about the last six months, which of the following activities, if any, have you used the internet for?

Please select all that apply

Code	Answer list	Scripting notes

1	Email	**DIGITALLY EXCLUDED IF ONLY CHOOSE THESE**
2	Generally browsing the internet	**DIGITALLY EXCLUDED IF ONLY CHOOSE THESE**
3	Accessing news and sport websites	**DIGITALLY EXCLUDED IF ONLY CHOOSE THESE**
4	Social networking websites (e.g. Facebook, Twitter)	**DIGITALLY EXCLUDED IF ONLY CHOOSE THESE**
5	Online banking	**SCREENOUT – CAPI**
6	Buying goods or services online (e.g. books, CDs, tickets, groceries)	**SCREENOUT – CAPI**
7	Selling things on platforms such as eBay or Gumtree	**SCREENOUT – CAPI**
8	Downloading/streaming games, movies, TV shows etc	**SCREENOUT – CAPI**
9	Using government services (e.g. TV licence, road tax, passport etc)	**SCREENOUT – CAPI**
95	Other	**SCREENOUT – CAPI**
96	None of these	**EXCLUSIVE - DIGITALLY EXCLUDED IF CHOSEN**

FOR CAPI ONLY

Base: All CAPI respondents who are digitally excluded (QDE1 = 2) OR (QDE2 = 1 OR 2) OR (QDE3 = 1-4 OR 96)

SINGLE RESPONSE

QDE4. Do you agree to take part in this survey?

Please select only one

Code	Answer list	Scripting notes
1	Yes, I agree	
2	No, I do not agree	**SCREENOUT**

INTRO TEXT

Firstly, some questions about you …

Base: All respondents

SINGLE RESPONSE

A1. Which of the following best describes the level of responsibility you have for paying the energy bills in your household?

Please select only one

Fixed codes	Answer list	Scripting notes
1	Solely responsible	
2	Jointly responsible (e.g. with partner, housemate)	
3	No responsibility	**SCREENOUT**
97	Don't know	**SCREENOUT**

Base: All respondents

SINGLE RESPONSE

A2. Do you have mains gas and/or mains electricity in your home?

Please select only one

Fixed codes	Answer list	Scripting notes
1	Both mains gas and electricity	
2	Mains electricity only	
3	Mains gas only	
4	Neither	**SCREENOUT**
97	Don't know	**SCREENOUT**
98	Prefer not to say	**SCREENOUT**

Base: All respondents

SINGLE RESPONSE

A3A. Please can you tell me your age at your last birthday?

Please type your response in the box below

[_____]

Fixed codes	Answer list	Scripting notes	Routing
98	Prefer not to say	**FIX, EXCLUSIVE**	**GO TO A3B**

Base: All who refused age (A3B = 98)

SINGLE RESPONSE

A3. Which of the following age bands do you belong to?

Please select only one

Fixed codes	Answer list	Scripting notes	Routing

1	Under 16	**SCREENOUT**	
2	16 to 24		
3	25 to 34		
4	35 to 44		
5	45 to 54		
6	55 to 64		
7	65 to 74		
8	75+		
98	Prefer not to say		

Base: All respondents

SINGLE RESPONSE

A4. Which of the following best describes your gender?

Please select only one

Code	Answer list	Scripting notes	Routing
1	Male		
2	Female		
3	Non-binary		
4	Other		
98	Prefer not to say		

Base: All respondents

OPEN RESPONSE, POSTCODE FORMATTING & VALIDATION APPLIED

A7. What is your full postcode? (Please note that this information will only be used by BMG Research to explore geographical variation in responses. Your postcode will not be passed back to Ofgem unless permission is given).

Fixed codes	Answer list	Scripting notes	Routing
1		**OPEN RESPONSE**	**ROUTE TO F9**
98	Prefer not to say		**ROUTE TO A7B**

IF INVALID POSTCODE ENTERED:

The postcode you have supplied does not appear to be a full postcode or is not a valid postcode. Please go back and check.

IF INVALID POSTCODE ENTERED AGAIN SHOW REGION AS A7B BELOW

Base: All who refuse to share postcode (A7 = 98)

SINGLE RESPONSE, SHOW ON SAME PAGE UNDERNEATH A7

A7B. Which region do you live in?

Fixed codes	Answer list	Scripting notes	Routing
1	East Midlands		
2	East of England		
3	London		
4	North East		
5	North West		
6	South East		
7	South West		
8	West Midlands		
9	Yorkshire and the Humber		
10	Wales		
11	Scotland		
98	Prefer not to say	**SCREENOUT**	

Base: All respondents

SINGLE RESPONSE

F9. Which of the following best describes the ownership of your home?

Please select only one

Fixed codes	Answer list	Scripting notes	Routing
1	Being bought on a mortgage		
2	Owned outright by household		
6	Shared ownership (part owned and part rented)		
3	Rented from Local Authority		
4	Rented from Housing Association/Trust		
5	Rented from private landlord		
7	Living rent free		
95	Other		
97	Don't know		

Base: All online panel respondents

SINGLE RESPONSE

C9. Please select **Somewhat agree.** If you don't select **somewhat agree**, you will not be able to proceed.

Fixed codes	Answer list	Scripting notes
1	Strongly agree	**QUALITY FAIL**
2	Somewhat agree	
3	Neither agree nor disagree	**QUALITY FAIL**
4	Somewhat disagree	**QUALITY FAIL**
5	Strongly disagree	**QUALITY FAIL**

Section A: INTRODUCTION

INTRO

We're going to start with some questions just to help get you into the flow of the survey. These are not a test, but just to help you warm up for the main questions

Base: All respondents

OPEN RESPONSE, FORCE NUMERIC BETWEEN 0 AND 1000

SEG3. Imagine that we flip a fair coin 1,000 times. What is your best guess about how many times the coin would come up heads in 1,000 flips?

Please type your response in the box below

[_____]

Fixed codes	Answer list	Scripting notes	Routing
97	Don't know		

Base: All respondents

OPEN RESPONSE, FORCE NUMERIC BETWEEN 0 AND 50

SEG4. Imagine we are throwing **a five-sided die** 50 times. On average, how many times would this die show an odd number (1, 3, or 5)?

Please type your response in the box below

[_____]

Fixed codes	Answer list	Scripting notes	Routing
97	Don't know		

INTRO

Now we would like to ask you some questions on your energy supplier and how you pay your energy bills.

Base: All who have electricity in their home (A2 = 1-2)

SINGLE RESPONSE

A8. Who is your electricity supplier?

Please select only one

Fixed codes	Answer list	Scripting notes
1	British Gas	
27	E Gas & Electricity	
4	E.ON Next	
28	Ecotricity	
3	EDF Energy	
29	Outfox Energy	
26	Octopus Energy	
6	Ovo Energy	
8	Scottish Power	
25	So Energy	
11	Utilita	
12	Utility Warehouse	
34	London Power	
35	Your Co-op Energy	
36	Sainsbury's Energy	
95	Other energy supplier (specify)	**OPEN RESPONSE**
97	Don't know	

Base: All who have gas in their home (A2 = 1, 3)

SINGLE RESPONSE

A9. Who is your gas supplier?

Please select only one

Fixed codes	Answer list	Scripting notes
13	British Gas	
29	E Gas & Electricity	
16	E.ON Next	
30	Ecotricity	

15	EDF Energy	
31	Outfox Energy	
28	Octopus Energy	
18	Ovo Energy	
20	Scottish Power	
27	So Energy	
23	Utilita	
24	Utility Warehouse	
37	London Power	
38	Your Co-op Energy	
39	Sainsbury's Energy	
95	Other energy supplier (specify)	**OPEN RESPONSE**
97	Don't know	

Base: All respondents

SINGLE RESPONSE

A9B. Overall, how satisfied or dissatisfied are you with your energy supplier?

Please select only one

Code	Answer list	Scripting notes	Routing
1	Very dissatisfied		
2	Dissatisfied		
3	Neither satisfied nor dissatisfied		
4	Satisfied		
5	Very satisfied		
97	Unsure		
98	Prefer not to answer		

Base: All respondents

SINGLE RESPONSE

A10. How do you usually pay for your energy?

Please select only one

Fixed codes	Answer list	Scripting notes
1	Pay by regular direct debit or standing order	
2	Pay on receipt of a bill by cash/cheque/debit or credit card/BACS/App	

3	Have a prepayment meter (for example, pay in advance by putting credit on a key, card or App)	
95	Pay in another way (please specify)	**OPEN RESPONSE**
97	Don't know	

Base: All who have a direct debit, prepayment meter, standard credit or pay another way (A10 = 1-3, 95)

MULTIPLE RESPONSE, RANDOMISE CODES 1-12

A15. You said you **[PIPE ANSWER FROM A10]**.

Why do you use the payment method you use?

Please select all that apply

Fixed codes	Answer list	Scripting notes
1	It's cheaper than other payment methods	
2	It's more convenient than other payment methods	
3	My supplier made me	
4	This was the default / I moved into a new home that already paid in this way	
5	It's easier to budget	
6	I don't know how to change it	
7	It gives me more control	
8	I haven't gotten around to changing it	
9	It helps me understand my energy consumption	
10	It's a good way to repay debt	
11	I actively chose to pay this way	**FIX TOP**
12	My supplier suggested I use this payment method	
13	Because I've always paid this way	
14	It helps to split bills between my household	
95	Other (please specify)	**OPEN RESPONSE**
97	Don't know	

Base: All who have a direct debit, prepayment meter, standard credit or pay another way (A10 = 1-3, 95)

MULTI RESPONSE

A16. If you could change your payment method for your energy, would you want to do so?

Please select all that apply

Fixed codes	Answer list	Scripting notes
1	No - I'm happy with the way I currently pay for my energy	**EXCLUSIVE**
2	Yes - I would prefer to pay by regular direct debit or standing order	**DO NOT SHOW IF A10 = 1**
3	Yes - I would prefer to pay on receipt of a bill by cash/cheque/debit or credit card	**DO NOT SHOW IF A10 = 2**
4	Yes - I would prefer to have a prepayment meter (for example, pay in advance by putting credit on a key, card or App)	**DO NOT SHOW IF A10 = 3**
97	Don't know	**EXCLUSIVE**

Base: All who do not have a prepayment meter (A10 = 1-2, 95, verbatims to be checked when finalising base size during data cleaning phase)

SINGLE RESPONSE

A11. How often do you usually pay?

Please select only one

Fixed codes	Answer list	Scripting notes
1	Monthly	
2	Quarterly (every 3 months)	
3	Every 6 months	
95	Other (please specify)	**OPEN RESPONSE, CHECK IN SOFT LAUNCH TO GAUGE FREQUENCY**
97	Don't know	

Base: All respondents

SINGLE RESPONSE

A14. Do you have a smart meter in your household?

A smart meter sends your energy supplier meter readings automatically and it also has a display device which shows you how much energy you are using in near real time.

Please select only one

Fixed codes	Answer list	Scripting notes
1	Yes – I have a smart meter for mains gas	**SHOW IF A2 = 1, 3**
2	Yes – I have a smart meter for mains electricity	**SHOW IF A2 = 1-2**
3	Yes – I have a smart meter for mains gas and electricity	**SHOW IF A2 = 1**
5	No, but I **would consider** getting one in the future	
6	No, and I **would not** consider getting one in the future	
97	Don't know	

Base: All respondents

SINGLE RESPONSE

H15. Does your household pay different amounts for its energy depending on when you use it?

This could mean you pay less for your energy at certain times during the day or night, or at weekends.

Please select one only

Fixed codes	Answer list	Scripting notes	Routing
1	Yes		
2	No	**FIX AT TOP**	

Base: Pays different amount for energy depending on times of day / week (H15 = 1)

SINGLE RESPONSE

H16. Some suppliers offer energy tariffs that charge consumers cheaper 'off-peak' rates for their energy at times of night or day when demand is at its lowest, and higher 'peak' rates at more popular times. These are called Time of Use tariffs and include Economy 7 or Economy 10 meters.

Is your household on one of these meters or tariffs?

Please select one only

Fixed codes	Answer list	Scripting notes	Routing
1	Yes – an Economy 7 or Economy 10 meter		
2	Yes – a Time of Use tariff where energy is cheaper at set times of the day or night	**ASK IF (SMART-METER) A14=1 OR A14 = 2 OR A14 = 3**	
3	Yes – a dynamic tariff where the price of energy can change at any time of the day or the night IF [A3/A4 SUPPLIER] = 11 (e.g. Octopus Agile Tariff)	**ASK IF (SMART-METER) A14=1 OR A14 = 2 OR A14 = 3** **ADD BRACKETED TEXT ONLY TO THOSE WHO SELECT OCTOPUS AT A8 OR A9 (A8 = 26 OR A9 = 28)**	
4	Yes – but I'm not sure which type	**ASK IF (SMART-METER) A14=1 OR A14 = 2 OR A14 = 3**	
5	None of these	**FIX**	
97	Don't know	**FIX**	

Base: All on a time of use tariff (H16 = 2)

SINGLE RESPONSE. RANDOMISE

QTOU. When customers switch energy tariff, they usually choose a tariff with a fixed term (typically 1–2 years). When that term ends, if the customer does not switch again, they are automatically moved to a default tariff covered by the price cap.

The energy price cap is the maximum amount energy suppliers can charge you for each unit of energy and standing charge if you're on a default tariff.

If you do not switch to another tariff when your time-of-use electricity tariff ends, which type of default tariff covered by the price cap would you prefer?

Please select only one

Fixed codes	Answer list	Scripting notes
1	A **"flat" default tariff** – the same price for electricity at all times of day and night	
2	A **time-of-use default tariff** – similar to your previous tariff, with different prices for electricity at different times of day and night	
97	Not sure	**FIX, EXCLUSIVE**

Base: All respondents

SINGLE RESPONSE

A18. Which is the **main** heating system that your household uses to heat the majority of your home in the winter?

Please select only one

Fixed codes	Answer list	Scripting notes	Notes
1	Gas central heating (standard or combi boiler to heat radiators or warm air system)		
2	Electric storage heaters (usually attached to walls)		
3	Gas fires		
4	Electric heaters (e.g. electric fires, fan heaters and plug in radiators)		
5	Coal / wood / smokeless fuel fires or stoves		
6	District / communal heating a.k.a on a heat network		**HEAT NETWORK**
7	Heat pump – a specific type of home heating (e.g. air source / ground source / hybrid heat pump)		
10	Micro-combined Heat and Power system		
12	Other - please specify (including type of fuel)	**OPEN RESPONSE**	
13	No heating system		
97	Don't know		
98	Prefer not to say		

Section B1: AWARENESS OF BILLS AND THE MARKET

INTRO

We will now ask you some questions about the energy market and your bills.

Base: All respondents

SINGLE RESPONSE

A20B. Generally, how well or poorly do you feel you understand the following?

Please select only one

COLUMNS

Fixed codes	Answer list	Scripting notes
1	Very poorly	
2	Poorly	

3	Neither well nor poorly	
4	Well	
5	Very well	

ROWS, RANDOMISE

Fixed codes	Answer list	Scripting notes
1	**How energy prices are set and who sets them** (e.g., factors influencing wholesale and retail prices, role of regulators and suppliers)	
2	**The different types of tariffs available to you** (e.g. fixed and variable tariffs	
3	**What's on your energy bill** (e.g., how to read and interpret your bill)	
5	**Payment options** (e.g., different ways to pay your energy bill)	
6	**Energy efficiency measures** (e.g., ways to reduce energy consumption and costs)	
7	**Your consumer rights and protections** (e.g., what to do if you have a complaint or issue)	

Base: All respondents

SINGLE RESPONSE

G2. A standing charge is a daily fixed amount that customers are required to pay as part of their energy bills. Standing charges are paid even if you do not use energy that day.
Do you pay a standing charge on your energy bill?

Please select only one

Fixed codes	Answer list	Scripting notes	Routing
1	I definitely pay a standing charge		
2	I probably pay a standing charge		
3	I'm not sure if I pay a standing charge		
4	I probably don't pay a standing charge		
5	I definitely don't pay a standing charge		
98	Prefer not to say		

Base: All who think they pay a standing charge (G2=1-2) AND have electricity (A2=1 OR 2)

SINGLE RESPONSE

G2B. How much is the **daily** standing charge for your **electricity**?

Please select only one

Fixed codes	Answer list	Scripting notes	Routing
1	Less than a penny per day		
2	1p-10p per day		
3	11p-40p per day		
4	41p-70p per day	**CODE AS CORRECT**	
5	71p-£1 per day		
6	More than £1 per day		
97	Don't know		

Base: All respondents

SINGLE RESPONSE

G2BX. On balance, how fair or unfair do you think standing charges are as a way of charging for energy?

Please select only one

Fixed codes	Answer list	Scripting notes	Routing
1	Very fair		
2	Somewhat fair		
3	Neither fair nor unfair		
4	Somewhat unfair		
5	Very unfair		
97	Don't know		

Base: All respondents

SINGLE RESPONSE

G2C. Lower standing charges could apply if consumers chose to shift their energy use away from peak times (e.g. 4-7pm on weekdays) to off peak hours when demand for energy is lower.

How willing or unwilling would you be to change your energy usage away from peak times if it meant being charged a lower daily standing charge?

Please select only one

Fixed codes	Answer list	Scripting notes	Routing
1	Very willing		
2	Somewhat willing		
3	Somewhat unwilling		
4	Very unwilling		
5	I already use energy at off peak times	**SHOW ONLY FOR THOSE ON TOU/DYNAMIC/ECONOMY 7 OR 10 (H15 = 1-4)**	
97	Don't know		

-

Section B2: AWARENESS OF OFGEM, DNOs & GDNs

INTRO

We will now ask you some questions about Ofgem.

Base: All respondents

SINGLE RESPONSE

B1. Before today, had you heard of Ofgem, the independent energy regulator for Great Britain?

Please select only one

Fixed codes	Answer list	Scripting notes
1	Yes – and I know a lot about Ofgem	
2	Yes – and I know a little bit about Ofgem	
3	Yes – I have heard of Ofgem but don't know anything about them	
4	No	
97	Don't know	

Base: Those who know at least a little about Ofgem (B1=1-2)

GRID, SINGLE RESPONSE PER ROW,

B12. To what extent do you agree or disagree with the following statements about Ofgem?

Please select only one answer option per row

COLUMNS

Fixed codes	Answer list	Scripting notes
1	Strongly agree	
2	Tend to agree	
3	Neither agree nor disagree	
4	Tend to disagree	
5	Strongly disagree	
97	Don't know	

ROWS, RANDOMISE

Fixed codes	Answer list	Scripting notes

2	Ofgem is to blame for high energy bills at the moment	
5	Ofgem is a trusted source of information	
6	Ofgem protects vulnerable consumers	
7	Ofgem holds energy suppliers to account	
8	Ofgem protects consumers by delivering a fairer energy system	**FIX AS SECOND STATEMENT**
9	Ofgem is making the energy system more green and less polluting	**FIX AS FIRST STATEMENT**
10	I would go to Ofgem for the facts on energy prices and tariffs	
11	I can trust Ofgem to tell me the truth about energy suppliers	
12	I can trust Ofgem to tell me about the transition to Net Zero	

Base: All respondents

GRID, SINGLE RESPONSE PER ROW, RANDOMISE ROWS

B13. Ofgem is Great Britain's independent energy regulator. Their role is to protect the interests of energy consumers. Ofgem sets the rules which energy suppliers and network operators must follow.

How well or poorly do you think Ofgem is doing the following?

Please select only one answer option per row

COLUMNS

Fixed codes	Answer list	Scripting notes
1	Very well	
2	Quite well	
3	Neither well nor poorly	
4	Quite poorly	
5	Very poorly	
97	Don't know	

ROWS, RANDOMISE

Fixed codes	Answer list	Scripting notes
1	Ofgem takes action if suppliers break the rules	
2	Ofgem ensures that consumers are protected if energy suppliers go out of business	
3	Ofgem protects consumers by making sure energy prices are fair	
4	Ofgem protects consumers by making sure that suppliers keep a high standard of customer service	
5	Ofgem prioritises consumer interests over energy suppliers or other energy companies in the industry	
6	Ofgem acts to protect vulnerable consumers	

Base: All respondents with electricity (A2 = 1 OR 2)

SINGLE RESPONSE

DNO1. Before today, had you heard of a Distribution Network Operator, or a DNO?
Please select only one

Fixed codes	Answer list	Scripting notes
1	Yes	
2	No	**FIX TO TOP**
97	Don't know	

Base: All respondents with electricity (A2 = 1 OR 2)

SINGLE RESPONSE

DNO2. Are you aware of your Distribution Network Operator (DNO) for electricity?
Please select only one

Fixed codes	Answer list	Scripting notes
1	Yes, and I know the name of my local area's DNO	
2	Yes, but I don't know the name of my local area's DNO	
3	No	**FIX TO TOP**
97	Don't know	

Base: All who have heard of DNOs (DNO1 = 1)

SINGLE RESPONSE, RANDOMISE

DNO3. Which of the following best describes the role of a DNO (Distribution Network Operator)?

Please select only one

Fixed codes	Answer list	Scripting notes
1	A company responsible for the delivery of electricity from the national grid to homes and businesses within a specific geographic area	**FOR ANALYSIS PURPOSES: CORRECT**
2	A website that provides advice, tools, and resources to help people save money on energy bills	**FOR ANALYSIS PURPOSES: INCORRECT**

3	A regulator responsible for overseeing electricity and gas markets, ensuring fair pricing, promoting competition and protecting consumers	**FOR ANALYSIS PURPOSES: INCORRECT**
4	A company responsible for providing electricity, setting tariffs, and managing billing and customer service	**FOR ANALYSIS PURPOSES: INCORRECT**
97	Don't know	**FIX AT END**

Base: All respondents with gas (A2 = 1 OR 3)

SINGLE RESPONSE

GDN1. Before today, had you heard of a Gas Distribution Network, or a GDN?
Please select only one

Fixed codes	Answer list	Scripting notes
1	Yes	
2	No	**FIX TO TOP**
97	Don't know	

Base: All respondents with gas (A2 = 1 OR 3)

SINGLE RESPONSE

GDN2. Are you aware of the operator of the Gas Distribution Network (GDN) for gas in your area?
Please select only one

Fixed codes	Answer list	Scripting notes
1	Yes, and I know the name of my local area's GDN	
2	Yes, but I don't know the name of my local area's GDN	
3	No	**FIX TO TOP**
97	Don't know	

Base: All who have heard of GDNs (GDN1 = 1)

SINGLE RESPONSE, RANDOMISE

GDN3. Which of the following best describes the role of a GDN (Gas Distribution Network) operator?

Please select only one

Fixed codes	Answer list	Scripting notes
1	A company that owns and operates the underground pipes that delivers gas to homes and businesses within a specific region	**FOR ANALYSIS PURPOSES: CORRECT**
2	A company responsible for installing gas appliances in homes and businesses	**FOR ANALYSIS PURPOSES: INCORRECT**
3	A company that produces power from natural sources like sunlight, wind, water, or biomass and sells it to energy suppliers	**FOR ANALYSIS PURPOSES: INCORRECT**
4	A company responsible for providing gas, setting tariffs, and managing billing and customer service	**FOR ANALYSIS PURPOSES: INCORRECT**
97	Don't know	**FIX AT END**

INTRO TEXT – BLURB ON GDNS AND DNOS.

Thank you for your answers so far.

DNOs (Distribution Network Operator) are companies responsible for the delivery of **electricity** from the national grid to homes and businesses, each responsible for a specific regional area.

Operators of a Gas Distribution Network (GDN), are companies that owns and operates the underground pipes that delivers **gas** to homes and businesses within a specific region.

Section C: EXPERIENCE

INTRO

We would now like to ask you some questions about your experience with your energy supplier.

Base: All respondents

GRID, SINGLE RESPONSE PER ROW

D1. To what extent do you trust or distrust your energy supplier(s) to...?

Please select only one for each statement

COLUMNS

Fixed codes	Answer list	Scripting notes
1	Completely trust	
2	Tend to trust	

3	Neither trust nor distrust	
4	Tend to distrust	
5	Completely distrust	
97	Don't know	
98	Prefer not to say	

ROWS

Fixed codes	Answer list	Scripting notes
1	Treat you fairly in their dealings with you	
2	Charge you a fair price for your energy	

Base: All respondents

GRID, SINGLE RESPONSE PER ROW

D2A. To what extent do you personally trust or distrust each of the following different organisations to be fair in the way they deal with customers and citizens?

Please select only one for each statement

COLUMNS

Fixed codes	Answer list	Scripting notes
1	Completely trust	
2	Tend to trust	
3	Neither trust nor distrust	
4	Tend to distrust	
5	Completely distrust	
97	Don't know	
98	Prefer not to say	

ROWS

Fixed codes	Answer list	Scripting notes
1	Energy suppliers	
2	Internet/broadband suppliers	

3	Banks/building societies	
4	Insurance companies	
5	Water companies	

Base: All online panel respondents

SINGLE RESPONSE, SCREEN OUT IF NOT CONSISTENT WITH A3 – ALLOW PNTS (CODE 98) AT A3 OR AGE_2 THROUGH WHATEVER THEY CHOOSE

AGE_2. Which of the following age brackets do you fit into?

Please select only one

Fixed codes	Answer list	Scripting notes	Routing
1	Under 16	**SCREENOUT**	
2	16 to 24		
3	25 to 34		
4	35 to 44		
5	45 to 54		
6	55 to 64		
7	65 to 74		
8	75+		
98	Prefer not to say		

Section D: ENGAGEMENT

INTRO TEXT

We now want you to think about changes you have made or might make to your household's energy tariff.

Base: All respondents

SINGLE RESPONSE

C4. Which, if any, of these have you or your household done **IN THE PAST 6 MONTHS?**

Please select only one

Fixed codes	Answer list	Scripting notes
1	I/we have compared energy tariffs but have not switched	
2	I/we have switched tariff with the same supplier	
3	I/we have switched to a new supplier	
96	None of these	**FIX AT END**
97	Don't know	**FIX AT END**
98	Prefer not to say	**FIX AT END**

Base: All who have not switched supplier in the last 6 months (C4≠3)

SINGLE RESPONSE

C4B. Roughly, how long ago was it that you **actively chose to** do each of the following?

Please select one per statement

COLUMNS

Fixed codes	Answer list	Scripting notes
1	In the last 2 years	
2	2 to 5 years ago	
3	More than 5 years ago	
96	Never	
97	Don't know	
98	Prefer not to say	

ROWS

Fixed codes	Answer list	Scripting notes
1	Switch suppliers	
2	Switch tariff with the same supplier	**SHOW IF C4≠2**

Base: All who have switched or compared in the past 6 months (C4=1-3)

SINGLE RESPONSE, RANDOMISE

C4A. You said that your household has [Insert answer from C4] **IN THE PAST 6 MONTHS.** How did you search for the information you were looking for?

Please select only one

Fixed codes	Answer list	Scripting notes
1	Directly with suppliers/my supplier (e.g. by phoning them up or searching on their website)	
2	Through a price comparison website (e.g. GoCompare, Compare the Market, Uswitch)	
3	Using a service that scans the energy market and contacts you if there is a better deal available (e.g. Auto Sergei, Moneysavingexpert, Martin Lewis Cheap Energy Club)	
95	Other (please specify)	**FIX AT END**
96	None of these	**FIX AT END**
97	Don't know	**FIX AT END**
98	Prefer not to say	**FIX AT END**

Base: All respondents

SINGLE RESPONSE

C4C. Imagine you were looking for a new energy deal. How confident, if at all, would you feel about understanding and comparing the prices, terms, and features of different energy deals?

Please select one per statement

COLUMNS

Fixed codes	Answer list	Scripting notes
1	Very confident	
2	Fairly confident	
3	Neutral	
4	Not very confident	

5	Not confident at all	
97	Don't know/Prefer not to say	

ROWS

Fixed codes	Answer list	Scripting notes
1	Comparing prices	
2	Comparing terms and features	

Base: All who have switched or compared in last 6 months (C4 = 1-3)

MULTI RESPONSE, ROTATE

C5A. And why did your household compare?

Please select all that apply

Fixed codes	Answer list	Scripting notes
1	I wanted a cheaper tariff	
2	I was dissatisfied with my supplier	
3	I wanted a different kind of tariff	
4	I'd heard there were better quality suppliers available	
17	My previous contract expired	
18	Energy prices were going up	
19	I saw another supplier's advert	
20	Word of mouth from friends and family	
95	Other reason (specify)	**FIX AT END**
96	No particular reason / I was curious	**EXCLUSIVE AND FIX AT END**
97	Don't know	**EXCLUSIVE AND FIX AT END**
98	Prefer not to say	**EXCLUSIVE AND FIX AT END**

Base: All who have switched in last 6 months (C4 = 2-3)

MULTI RESPONSE, ROTATE

C5B. And why did your household switch **<IF C4=2** "tariff" **/ IF C4=3** "supplier"**>**?

Please select all that apply

Fixed codes	Answer list	Scripting notes
1	To get a cheaper tariff	
3	To get the tariff I wanted	
4	To move to a supplier with better rated customer service (e.g. I saw a star rating)	**SHOW ONLY THOSE C4=3**
10	Other information (e.g. word of mouth) made me think the new supplier would have better customer service than my old one	**SHOW ONLY THOSE C4=3, FIXED AFTER PREVIOUS CODE**
6	To get a reward or incentive as part of switching	
9	To get a supplier/tariff that was protected by the price cap	
95	Other reason (specify)	**FIX AT END**
97	Don't know	**EXCLUSIVE AND FIX AT END**
98	Prefer not to say	**EXCLUSIVE AND FIX AT END**

Base: All who have compared but not switched in last 6 months (C4 = 1 AND ≠ 2-3)

MULTI RESPONSE, ROTATE

C5C. And after comparing, why did your household **not** switch tariff or supplier?

Please select all that apply

Fixed codes	Answer list	Scripting notes
1	I didn't find a cheaper tariff	
2	I didn't find the kind of tariff I wanted	
3	I didn't find any better-rated suppliers	
4	I didn't find a reward or incentive as part of switching	
5	I didn't find a supplier/tariff that was protected by the price cap	
6	My current supplier offered me a new deal	
7	I couldn't be sure if other energy suppliers would be better than mine	**FIX AFTER CODE 3**
8	It was too much effort	
9	I didn't have the time	
10	I needed more information	

11	I forgot about it	
12	I haven't got around to it yet, but I still plan to	
95	Other reason (specify)	**FIX AT END**
97	Don't know	**EXCLUSIVE AND FIX AT END**
98	Prefer not to say	**EXCLUSIVE AND FIX AT END**

Base: **All who have switched (C4=3 OR C4B.1=1-3)**

GRID, SINGLE RESPONSE PER ROW, RANDOMISE ROWS

C10. How much better or worse is your new supplier than your old supplier across the following aspects?

Please select only one for each statement

COLUMNS

Fixed codes	Answer list	Scripting notes
1	Much better	
2	Slightly better	
3	About the same	
4	Slightly worse	
5	Much worse	
97	Can't remember / Unsure	
98	Prefer not to say	

ROWS

Fixed codes	Answer list	Scripting notes
1	Customer Service	
2	Price	
3	Clarity of billing	
4	Their app	

Base: All who have switched (C4=2-3)

SINGLE RESPONSE

C11. Compare your current energy deal to your previous deal.

Roughly how much, if anything, has switching **<IF C4=2** "tariff"**><IF C4=3** "supplier"**>** saved you per month?

Please select only one

Fixed codes	Answer list	Scripting notes	Routing
1	About the same as before		
2	Under £5 a month (under £60 a year)		
3	£5-£9 a month (£60-£119 a year)		
4	£10 - £14 a month (£120-£179 a year)		
5	£15 - £19 a month (£180-£239 a year)		
6	£20 - £29 a month (£240-£359 a year)		
7	£30 - £39 a month (£360-£479 a year)		
8	More than £40 a month (more than £480 a year)		
9	I now pay more for my energy		
97	Don't know		
98	Prefer not to say		

Base: **All respondents**

GRID, SINGLE RESPONSE PER ROW

D3. How likely do you think it is that you or someone in your household will do these things over the next three months?

Please select only one for each statement

COLUMNS

Fixed codes	Answer list	Scripting notes
1	Definitely will	
2	Probably will	
3	Unsure	
4	Probably will not	
5	Definitely will not	
98	Prefer not to say	

ROWS

Fixed codes	Answer list	Scripting notes
1	Compare energy tariffs	
2	Switch to a new tariff with my current supplier	
3	Switch to a new tariff with a new energy supplier	

Base: All respondents

MULTI RESPONSE, ROTATE

D11A. Below are a number of statements about comparing the market for new energy deals. Which, if any, do you find are the main reasons **not** to look for new deals?

Please select all that apply

Fixed codes	Answer list	Scripting notes
1	No cheaper deals available at the moment than my current deal	
2	No energy suppliers who offer better customer service than mine	
3	Don't trust other energy suppliers as much as my existing supplier	
4	Don't have the time to check for better deals	
6	Not enough reliable information available	
7	Don't understand the energy market well enough	
9	Not interested in comparing or switching deals at the moment	
10	Would have to pay an exit fee	
11	Worried that the switching process itself would be complex or time consuming	
12	Would have to discuss switching tariffs with my landlord / others in my household	
13	Worried that it's risky e.g. I could get billed twice during the switching process	
14	Would lose any benefits to having a long-term relationship with my current energy supplier	
15	Finding good deals takes a lot of effort/ is complex	
16	Don't know where to look for information on how to compare deals	
95	Other reason (specify)	**FIX AT END**

96	None of these	**EXCLUSIVE AND FIX AT END**
97	Don't know	**EXCLUSIVE AND FIX AT END**
98	Prefer not to say	**EXCLUSIVE AND FIX AT END**

Base: All selecting more than one code at D11A

SHOWCARD S

SINGLE RESPONSE, ROTATE

D11B. And which is the main reason~~s~~ **not** to look for new deals?

Please select one

Fixed codes	Answer list	Scripting notes
1	No cheaper deals available at the moment than my current deal	**SHOW IF D11A=1**
2	No energy suppliers who offer better customer service than mine	**SHOW IF D11A=2**
3	Don't trust other energy suppliers as much as my existing supplier	**SHOW IF D11A=3**
4	Don't have the time to check for better deals	**SHOW IF D11A=4**
		SHOW IF D11A=5
6	Not enough reliable information available	**SHOW IF D11A=6**
7	Don't understand the energy market well enough	**SHOW IF D11A=7**
		SHOW IF D11A=8
9	Not interested in comparing or switching deals at the moment	**SHOW IF D11A=9**
10	Would have to pay an exit fee	**SHOW IF D11A=10**
11	Worried that the switching process itself would be complex or time consuming	**SHOW IF D11A=11**
12	Would have to discuss switching tariffs with my landlord / others in my household	**SHOW IF D11A=12**
13	Worried that it's risky e.g. I could get billed twice during the switching process	**SHOW IF D11A=13**
14	Would lose any benefits to having a long-term relationship with my current energy supplier	**SHOW IF D11A=14**
15	Finding good deals takes a lot of effort/ is complex	**SHOW IF D11A=15**
16	Don't know where to look for information on how to compare deals	**SHOW IF D11A=16**
95	[INSERT OPEN TEXT FROM D11A, 95]	**SHOW IF D11A=95, FIX AT END**

Base: All respondents

MULTI RESPONSE, ROTATE, LIMIT TO THREE SELECTIONS

D13. Which, if any, of the following are most likely to make you want to switch to a new energy deal at the moment?

Please select up to 3

Fixed codes	Answer list	Scripting notes
1	If the new supplier is a well-known / established company	
2	If I can get a cheaper tariff than I'm currently on	
3	If the new supplier has better customer service than my current supplier	
4	To get a loyalty scheme or other incentives	
5	If I can get a green tariff	
6	If switching helped me to be protected by the price cap	
7	If I can get a fixed term tariff	
8	If I can get a variable tariff	
9	If I can get a time of use (ToU) tariff by switching	
10	If I can get an Electric Vehicle (EV) tariff by switching	
95	Something else (please specify)	**OPEN RESPONSE - FIX AT END**
96	There is nothing attractive	**EXCLUSIVE AND FIX AT END**
97	Don't know	**EXCLUSIVE AND FIX AT END**
98	Prefer not to say	**EXCLUSIVE AND FIX AT END**

Base: All respondents

SINGLE RESPONSE

D18. If there was a supplier with customer service **just as good as yours**, how much cheaper per month would the other supplier need to be to make you interested in switching?

Please select only one

Fixed codes	Answer list	Scripting notes	Routing
1	Up to £5 a month cheaper (up to £60 a year)		
2	£5-£9 a month cheaper (£60-£119 a year)		
3	£10 - £14 a month cheaper (£120-£179 a year)		
4	£15 - £19 a month cheaper (£180-£239 a year)		
5	£20 - £29 a month cheaper (£240-£359 a year)		
6	£30 - £39 a month cheaper (£360-£479 a year)		
7	More than £40 a month cheaper (More than £480 a year)		
8	I would not switch for any amount of savings		
97	Don't know		
98	Prefer not to say		

Base: All respondents

SINGLE RESPONSE, RANDOMISE

BAT1. Thinking about deals that energy suppliers offer, which of the following is the closest to your view on who energy suppliers offer better deals to?

Please select only one

Fixed codes	Answer list	Scripting notes	Routing
1	Suppliers' best deals should **be available to existing customers as well as new ones**, even if this makes their cheapest deals more expensive		
2	Customers who shop around should be **offered the cheapest deals as new customers**, even if this means that existing customers pay a little more		
97	Don't know	**FIX**	

Section E: AFFORDABILITY

INTRO

We would now like to ask you some questions about energy costs.

Base: All respondents

SINGLE RESPONSE

F5A. Which one of the following statements best describes how well you are keeping up with **energy bills** specifically at the moment?

Please select only one

Fixed codes	Answer list	Scripting notes	Routing
1	Keeping up with energy bills without any difficulties		
2	Keeping up with energy bills, but it is a struggle from time to time		
3	Keeping up with energy bills, but it is a constant struggle		
4	Falling behind with some energy bills		
5	Having real financial problems and have fallen behind with energy bills		
6	Don't have any energy bills		
97	Don't know		
98	Prefer not to say		

Base: Those who have fallen behind on their energy bills (F5A = 4-5)

SINGLE RESPONSE

F5B. For how long have you been behind on your energy bills?

Please select only one

Fixed codes	Answer list	Scripting notes	Routing
1	Less than 1 month		
2	Between 1 and 3 months		
3	Between 3 and 6 months		
4	Between 6 months and 1 year		
5	Over a year		
97	Don't know		
98	Prefer not to say		

Base: All respondents

SINGLE RESPONSE

F5. And which one of the following statements best describes how well you are keeping up with your other general **household bills** (excluding energy bills) and credit commitments at the moment?

Please select only one

Fixed codes	Answer list	Scripting notes	Routing
1	Keeping up with all bills and commitments without any difficulties		
2	Keeping up with all bills and commitments, but it is a struggle from time to time		
3	Keeping up with all bills and commitments, but it is a constant struggle		
4	Falling behind with some bills or credit commitments		
5	Having real financial problems and have fallen behind with many bills or credit commitments		
6	Don't have any bills or credit commitments		
97	Don't know		
98	Prefer not to say		

Base: Where have fallen behind on at least some bills or credit commitments (F5=4 or 5)

MULTI RESPONSE, ROTATE

G3. Thinking about bills other than energy, which of the below types of bills or credit commitments are you behind on at the moment?

Please select all that apply

Fixed codes	Answer list	Scripting notes	Routing
1	Water bill		
2	Mobile phone bill		
3	Landline phone		
4	Council tax		
5	Other subscriptions (such as entertainment services e.g. Netflix)	**FIX BELOW 7**	
6	Broadband / Internet		
7	TV provider (not including subscriptions such as Netflix etc)		
8	Credit cards and other buy-now-pay-later services (e.g. Klarna)		

9	Rent or Mortgage payments		
95	Other (please specify)	**OPEN TEXT BOX**	
97	Don't know		
98	Prefer not to say		

Base: All respondents

MULTI RESPONSE, RANDOMISE

E3 Thinking about your energy bills over the last 3 months. Which, if any, of the following have happened to you or your household because of affordability issues?

Please select all that apply

Fixed codes	Answer list	Scripting notes
1	I/we have reduced the amount of energy we are using	**SHOW ALL**
2	I/ we have contacted our energy supplier to ask for assistance with paying our energy bills	**SHOW ALL**
3	My/our energy supplier has contacted us to offer us assistance with paying our energy bills	**SHOW ALL**
4	I/ we have been unable to top up the meter because we can't afford it	**SHOW IF A10=3, PIN CODES 4-8, 12, 13 TOGETHER**
5	I/we have reduced the amount we usually put on our prepayment meter	**SHOW IF A10=3, PIN CODES 4-8, 12, 13 TOGETHER**
6	I/we have run out of credit on our meter and have been disconnected from our energy supply for more than 3 hours	**SHOW IF A10=3, PIN CODES 4-8, 12, 13 TOGETHER**
7	I/we have used the emergency credit on our meter	**SHOW IF A10=3, PIN CODES 4-8, 12, 13 TOGETHER**
8	I/we have asked our supplier for additional credit above the emergency credit on our meter	**SHOW IF A10=3, PIN CODES 4-8 TOGETHER**
9	I/we have cancelled the direct debit payment for our energy bill	**SHOW IF A10=1**
10	I/we have reduced the amount of our direct debit for our energy bill	**SHOW IF A10=1**
11	I/we have fallen behind on an energy bill and owe money to our energy supplier	**SHOW IF A10=1-2**
12	I recently moved on to a prepayment meter because I wanted it to help me manage what I spend on energy	**SHOW IF A10=3, PIN CODES 4-8, 12, 13 TOGETHER**

13	I recently moved on to a prepayment meter because my energy supplier made me	**SHOW IF A10=3, PIN CODES 4-8, 12, 13 TOGETHER**
14	I recently changed my payment method from direct debit to standard credit (i.e. paying on receipt of a bill) to help me manage my energy bills	**SHOW IF A10=2**
15	I/we have been contacted by a debt collection agency	**SHOW ALL**
96	None of these	**EXCLUSIVE AND FIX AT END**
97	Don't know	**EXCLUSIVE AND FIX AT END**
98	Prefer not to say	**EXCLUSIVE AND FIX AT END**

Base: All who selected affordability issue at E3 (E3=2-15)

SINGLE RESPONSE

E26. You said you had experienced an issue with affordability of energy bills. Do you think your supplier is aware of these affordability issues?

Please select only one

Fixed codes	Answer list	Scripting notes
1	Yes – I contacted them to let them know	
2	Yes – they contacted me about my affordability issues	
3	Yes – but there has been no contact so far about them	
4	No	
97	Don't know	
98	Prefer not to say	

Base: All with affordability issues in last 3 months (E3 = 2-15)

MULTI RESPONSE

E24. Has your household ever had similar affordability issues with your gas or electricity bills before the last three months?

Please select all that apply

Fixed codes	Answer list	Scripting notes

1	Yes – within the last two years	
3	Yes – more than two years ago	
2	No	**EXCLUSIVE**
97	Don't know	**EXCLUSIVE**
98	Prefer not to say	**EXCLUSIVE**

Base: All respondents

MULTI RESPONSE, ROTATE

E2. What impacts, if any, have the high costs of home energy had on your household?

Please select all that apply

Fixed codes	Answer list	Scripting notes
1	I/we have stopped saving/reduced amount regularly saving	
2	I/we have had to reduce spending on necessities (e.g. food, clothing, medicines)	
3	I/we have had to reduce other spending (e.g. holidays, meals out, days out)	
4	I/we have struggled with paying other housing costs or bills	
5	I/we have reduced the amount of energy used at home because we can't afford it	
6	I/we have used alternative heating sources more (e.g. coal/log burner)	
7	I/we have taken on more household debt (e.g. taking out loans, borrowing more, using more credit)	
95	Other risk (please specify)	**FIX AT END**
96	No impact	**EXCLUSIVE AND FIX AT END**
97	Don't know	**EXCLUSIVE AND FIX AT END**
98	Prefer not to say	**EXCLUSIVE AND FIX AT END**

Base: All respondents

SINGLE RESPONSE

E25. How much of the time are you able to keep the rooms you are using in your home at a comfortable temperature this month?

Please select one only

Row code	Column list	Scripting notes	Routing
1	Always		
2	Mostly		
3	Sometimes		
4	Rarely		
5	Never		
97	Don't know		
98	Prefer not to say		

Base: All respondents

MULTIPLE RESPONSE, RANDOMISE

. Which of the following actions, if any, have you taken in order to reduce the costs of your energy bills in the past 3 months?

Please select all that apply

Fixed codes	Answer list	Scripting notes
1	Reduced your boiler flow temperature	
2	Reduced your room thermostat	
3	Turned down radiators when rooms aren't in use	
4	Reduced washing machine temperature or number of washes	
5	Reduced tumble dryer use	
6	Turned off appliances instead of leaving them on standby	
7	Prevented heat escaping through doors, windows or chimneys by draught-proofing	
8	Installed a smart thermostat/ heating controls	
9	Changed lights to energy efficient bulbs	
10	Added secondary glazing film as temporary secondary glazing	
11	Insulated your hot water tank	
12	Added loft/home insulation	
13	Turned off my fridge / freezer	

14	Looked for or used safe, warm and free places in my local community where I can go during the day (such as village halls, churches, libraries and community centres)	
96	I have not taken any actions to reduce the cost of my energy bills	**FIX AT TOP**
95	Something else (please specify)	**OPEN RESPONSE BOX**
98	Prefer not to say	

Base: All respondents

GRID, SINGLE RESPONSE PER ROW, FIX ROWS IN POSITION

E10. Looking forward, what do you think will happen to **YOUR HOUSEHOLD'S ENERGY COSTS** across the following time periods?

By energy costs, we mean the cost per unit of energy.

Please select only one for each statement

COLUMNS

Fixed codes	Answer list	Scripting notes
1	Go up a lot	
2	Go up a little	
3	Stay the same	
4	Fall a little	
5	Fall a lot	
97	Don't know	

ROWS

Fixed codes	Answer list	Scripting notes
4	Between now and the end of March 2026	**SHORT TERM**
6	From April 2026 onwards	**LONG TERM**

Base: All respondents

MULTI RESPONSE, RANDOMISE CODES 1-9

E5. Have you contacted any of the following for information, advice or support with paying your energy bills in the past 3 months?

By contact, we mean getting in touch or searching for information.

Please select all that apply

Fixed codes	Answer list	Scripting notes
1	Citizens Advice	
2	Ofgem	
3	My energy supplier	
4	Comparison websites	
5	Local authority	
6	StepChange	
7	Money Advice Trust	
8	Another debt advice charity	**FIX AT END**
9	Friends and family	
10	Somewhere else (specify)	**OPEN RESPONSE**
11	I have not contacted any of these for information or advice	**EXCLUSIVE AND FIX AT END**
97	Don't know	**EXCLUSIVE AND FIX AT END**
98	Prefer not to say	**EXCLUSIVE AND FIX AT END**

Section T: Closing demographics

INTRO TEXT

Finally, we've got a few questions about you; these are just to make sure we have covered a representative cross section of people. Again, we recognise that you might consider some of these questions to be personal or sensitive in which case you are free not to answer them. The information you provide will be used for the sole purpose of making sure we understand the views of different groups of customers.

Base: All respondents

SINGLE RESPONSE

CL1. In view of the general economic situation, do you think you will be able to save any money in the next 12 months?
Please select only one

Fixed code	Answer list	Scripting notes	Routing
1	Yes		
2	No		
97	Don't know		
98	Prefer not to say		

Base: All respondents

SINGLE RESPONSE

CL2. Could your household afford to pay an unexpected, but necessary, expense of £900?
Please select only one

Fixed code	Answer list	Scripting notes	Routing
1	Yes		
2	No		
97	Don't know		
98	Prefer not to say		

Base: All respondents

SINGLE RESPONSE

CL3. Have you had to borrow more money or use more credit than usual in the last month, compared to a year ago?
Borrowing or using credit includes credit cards, overdrafts, or taking out loans, borrowing from friends, family, neighbours or other personal connections.
Please select only one

Fixed code	Answer list	Scripting notes	Routing
1	Yes		
2	No		
97	Don't know		
98	Prefer not to say		

Base: **All respondents**

SINGLE RESPONSE

CL3E. Which of the following statements best describes your situation in relation to your current level of debt?

Please select only one

Fixed code	Answer list	Scripting notes	Routing
1	No debt		
2	Can easily manage		
3	Getting harder		
4	Difficult to manage		
5	Unable to manage		
97	Don't know		
98	Prefer not to say		

Base: All respondents

SINGLE RESPONSE

A6. Please indicate to which occupational group the **Chief Income Earner** in your household belongs, or which group fits best

If the Chief Income Earner is retired and has an occupational or private pension, please answer for their most recent occupation

If they are not in employment and have been out of work for less than 6 months, please answer for their most recent occupation

Please select only one

Fixed codes	Answer list	Scripting notes	Routing
1	Semi or unskilled manual work (for example, Manual workers, all apprentices to become skilled		

	Tradesperson, Caretaker, Park Keeper, non-HGV Driver, Shop Assistant)		
2	Skilled manual worker (for example, Skilled Bricklayer, Carpenter, Plumber, Painter, Bus/ Ambulance Driver, HGV Driver, AA Patrolman, Pub/Bar worker, etc.)		
3	Supervisory or clerical/ junior managerial/ professional/administrative (for example, Office worker, Student Doctor, Foreman with 25+ employees, Salesperson, etc.)		
4	Intermediate managerial/ professional/ administrative (for example, Newly qualified (under 3 years) Doctor, Solicitor, Board Director in small organisation, Middle Manager in large organisation, Principle Officer in civil service/local government)		
5	Higher managerial/ professional/ administrative (for example, Established Doctor, Solicitor, Board Director in a large organisation (200+ employees, top level civil servant/public service employee)		
6	Full time Student		
7	Casual worker – not in permanent employment		
8	Housewife/ Homemaker		
9	Retired and living on state pension (for example, not a private or work-related pension scheme)		
10	Unemployed or not working due to long-term sickness		
11	Full-time carer of another household member		
95	Other (please specify)	**OPEN RESPONSE**	
97	Don't know		
98	Prefer not to say		

Base: All respondents

SINGLE RESPONSE

F1. What is your ethnic group?

Please select only one

Fixed codes	Answer list	Scripting notes	Routing
	White	**HEADING NOT CODE**	
1	British/English/Welsh/Scottish/Northern Irish		
2	Irish		
3	Gypsy, Traveller or Irish Traveller		
4	Any other white background	**OPEN RESPONSE**	
	Mixed	**HEADING NOT CODE**	
5	White and Black Caribbean		
6	White and Black African		
7	White and Asian		
8	Any other Mixed/ Multiple ethnic background	**OPEN RESPONSE**	
	Asian/Asian British	**HEADING NOT CODE**	
9	Indian		
10	Pakistani		
11	Bangladeshi		
12	Chinese		
13	Any other Asian background	**OPEN RESPONSE**	
	Black/Black British	**HEADING NOT CODE**	
14	African		
15	Caribbean		
16	Any other Black/African/Caribbean background	**OPEN RESPONSE**	
	Other ethnic group	**HEADING NOT CODE**	
95	Other ethnic group (please specify)	**OPEN RESPONSE**	
98	Prefer not to say		

Base: All respondents

SINGLE RESPONSE

F8. What type of property does your household live in?

Please select only one

Fixed codes	Answer list	Scripting notes	Routing
1	House - detached		

2	House – semi-detached		
3	House – end terrace		
4	House – mid terrace		
5	Bungalow		
6	Purpose built flat / maisonette		
7	Converted flat / maisonette		
8	Tenement		
95	Other (please specify)	**OPEN RESPONSE**	
97	Don't know		
98	Prefer not to say		

Base: All respondents

MULTI RESPONSE

F2. **INCLUDING YOURSELF,** which of the following groups live in your household?

Please select all that apply and indicate the number of people in the household INCLUDING YOURSELF

Fixed codes	Answer list	Scripting notes	Routing
1	Someone who is expecting (currently pregnant)	**NUMERIC – MAX 10**	
2	Children aged under 5	**NUMERIC – MAX 20**	
3	Children aged 5-15	**NUMERIC – MAX 20**	
4	Adults aged 16-64	**NUMERIC – MAX 20**	
5	Adults aged 65+	**NUMERIC – MAX 20**	
98	Prefer not to say		

Base: All respondents

SINGLE RESPONSE

F7. Do you or anyone in your household have any long-term illness, physical or mental health problem or disability which limits your daily activities or the work you can do? This includes problems due to old age

Please select only one

Fixed codes	Answer list	Scripting notes	Routing
1	Yes		
2	No		
97	Don't know		
98	Prefer not to say		

Base: All respondents

MULTIPLE RESPONSE

F7A. Do you or anyone in your household have any high-risk needs that require you to use medical equipment at home that run on energy?

For example, this could be a dialysis machine, an oxygen concentrator or a ventilator.

Please select all that apply

Fixed codes	Answer list	Scripting notes
1	Yes	
2	No	
98	Prefer not to say	

Base: All respondents

SINGLE RESPONSE

F6. As far as you are aware, are you, or is anyone in your household on your energy supplier's Priority Services Register?

Please select only one

Fixed codes	Answer list	Scripting notes	Routing
1	Yes		
2	No		
97	Don't know		
98	Prefer not to say		

Base: All respondents

SINGLE RESPONSE

F3. SHOW ONLINE AND CAPI: What is your total household income per year from all sources, before tax and other deductions?

Please select only one

Fixed codes	Answer list	Scripting notes	Routing
3	Less than £5,000		
4	£5,000 to less than £10,000		
5	£10,000 to less than £16,000		
6	£16,000 to less than £20,000		
7	£20,000 to less than £25,000		
8	£25,000 to less than £30,000		
9	£30,000 to less than £35,000		
10	£35,000 to less than £45,000		
11	£45,000 to less than £60,000		
12	£60,000 to less than £80,000		
13	£80,000 or over		
97	Unsure		
98	Prefer not to say		

Base: All respondents

MULTI RESPONSE

F4. Is anyone in your household in receipt of any the following benefits?

Please select all that apply

Fixed codes	Answer list	Scripting notes
1	Council Tax Support	
2	Housing Benefit	
3	Income Support	
4	Income-based Jobseeker's Allowance	
5	Income-related Employment and Support Allowance	
6	Pension Credits	**SHOW IF F2 CODE 5 = 1 OR MORE**
7	Personal Independence Payment	**SHOW IF F7 = 1**
8	Social Fund (Sure Start Maternity Grant, Funeral Payment, Cold Weather Payment)	

9	Tax Credits (Child Tax Credit and Working Tax Credit)	
10	Universal Credit	
11	Disability Living Allowance	**SHOW IF F7 = 1**
13	Carer's Allowance	
12	Any other benefit not listed (please specify)	**OPEN TEXT BOX**
96	None of these	**EXCLUSIVE**
97	Don't know	**EXCLUSIVE**
98	Prefer not to say	**EXCLUSIVE**

FOR CAPI ONLY

As part of BMG Research's quality control process, my employer will wish to contact some of the people I have interviewed. This is to confirm that I have undertaken the interview in an appropriate manner, and according to market research practice. Could you please provide me with your name, confirm your address and provide me with a contact telephone number and/or email. This information will not be passed on, or used for any purpose other than our quality control processes unless you have given permission during the survey. Your details will be deleted as soon as our quality controls process ends. Record name and address details and take land line or mobile phone number, including the dialling code at front of questionnaire.

IMPORTANT: TAKE CARE TO RECORD RESPONDENT NAME AND ADDRESS DETAILS ACCURATELY. PLEASE USE BLOCK CAPITALS.

RESPONDENT'S NAME:	
ADDRESS: (Address Line 1)	
(Address Line 2)	
(Address Line 3)	
(Postal Town)	
(County)	
POSTCODE: (**ESSENTIAL**)	
EMAIL: (**ESSENTIAL IF TELEPHONE NOT PROVIDED**)	

TELEPHONE: (INCLUDING **STD**) (**ESSENTIAL IF EMAIL NOT PROVIDED**)	

READ: Thank you, those are all the questions I have.

If you are concerned about whether BMG is a genuine market research agency you can call the Market Research Society on 0800 975 9596 during office hours.

Base: CAPI

CAPI OUTRO

Thank you for completing this survey.

Base: All online respondents

ONLINE OUTRO

You have reached the end of the survey. Thank you for taking the time to answer our questions. Your input is really appreciated.

Please **click next** to submit your responses.

Appendix B: Data linking approach

Base: If has a Smart Meter AND from Nostat panel

DATA LINKING INTRO TEXT



BMG Research is working with **Norstat** on an exclusive offer for its members. If you agree and let us access your household electricity consumption data and you qualify based on our checks, you'll receive 100 coins worth £10**added directly to your Norstat account. Simple as that!**

We just need a few basic details, which will take around 2 minutes to complete. So, if you qualify**, that's £10 for just two minutes of your time** — something that would normally take several surveys to build up.

This is opportunity open for a very limited time to Norstat and we are expecting high level of interest.

This research is being conducted by BMG Research on behalf of Ofgem, Great Britain's energy regulator, to better understand how to bring down energy bills and protect consumers.

Taking part in this additional step is entirely voluntary. Your survey is already complete, and your reward will not be affected if you choose not to take part.

If you agree and provide your details and we can verify you qualify, here's how it will work:

- The data retained by Ofgem and BMG Research after the study will be used for research and analysis purposes only. Your personal identifiable data will not be provided to Ofgem, and it will not be possible for Ofgem to identify you in the data.
- You would only share your historic smart meter electricity consumption data from the previous 13 months. No data would be collected on an ongoing basis.

Please read the information below, which explains what data is needed and how it will be handled.

If you would like further information at any point, please contact one of the organisations in the Contact Details section at the end.

If you're happy to proceed, complete the consent question at the end.

Base: All with a smart meter AND from Norstat panel

INFORMATION PAGE

Why is this research being conducted?

By analysing household energy consumption, we can design solutions that better protect consumers and help us to achieve a sustainable energy system at a lower cost for consumers. For example, we will be able to design solutions that optimise the use of renewable energy sources, which are abundant at certain times of day and more limited at others. Ultimately, this could be beneficial for everyone by lowering household energy bills and infrastructure costs. Ofgem has appointed the research company BMG Research and its approved partners to conduct this research independently.

What does the research involve?

The research involves the collection and analysis of energy consumption data. To do this, BMG Research needs to access data held in your smart meter on how much energy your household uses. Details of how we will access and use this data are included below. If you choose to take part, BMG Research will access the data using a service provided by third-party provider, N3rgy. N3rgy do not hold any of the data, they will only process and supply BMG with the relevant energy consumption data.

How will we access the data?

If you consent to being part of this research, BMG Research will first need to verify your home address. To do this, you will be asked, within this survey, to provide your postcode and select your street address and whether or not you have lived at this address for more or less than 13 months. If you have lived at this address for less than 13 months, you will also be asked for your move-in date.

Having provided this information, BMG Research will send you a letter through the post to the address provided. On this letter will be a QR code and web address. You will need use these to access a short additional survey, which will ask you to verify your address. This will be the only question in the survey and will take less than a minute to complete.

After verifying your address, you will be credited with 100 Norstat coins (worth £10) in your Norstat account. Please allow 2 weeks for this to be processed.

Do I have to take part, and can I withdraw?

Taking part in this research is entirely voluntary.

If you do not take part in this section of the survey, your other survey responses will still be considered as a completed survey, and you will receive your Norstat coins incentive as a thank you for your time.

However, you would not be eligible for the additional 100 Norstat coins (£10) incentive.

If you wish to withdraw before completing the survey all you need to do is close the survey window. To withdraw consent after completing the survey, you can do so by emailing dataprotection@bmgresearch.com or calling +44 (0) 2030123401. The withdraw request will be executed in a maximum of 3 (three) working days from the reception of the request.

What data will be accessed from my smart meter?

If you choose to participate in the research, n3rgy will retrieve the following data from your electricity smart meter and share it with BMG Research:

- Electricity half-hourly consumption and export data for the time period since you had your smart meter installed or when you moved into the property (going back up to a maximum of 13 months from today).
- Electricity tariff data containing information on the prices you are currently charged every half-hour for energy consumed. This data is retrieved from your smart meter as kept up to date by your energy supplier. Note that smart meters do not support electricity dynamic tariffs (e.g. Agile Octopus).
- Information identifying the energy meter (number, location, type).

You will not need to provide any meter readings manually.

What will you do with my data?

BMG Research will link your energy consumption data with your responses in the survey you have just completed. This will allow us to assess differences in energy consumption based on household factors captured through the survey, for example, how you pay for your energy, your engagement in the energy market, and any steps you are taking to reduce energy consumption.

At the end of the study, BMG Research will remove your identifiable personal data and share the smart meter data highlighted above with Ofgem for further research. Your smart meter data will be used by Ofgem and BMG Research solely for the research purposes outlined above, and it will not be shared with anyone else under any circumstances.

Will my taking part in this project be kept confidential?

Your participation in the research will be kept strictly confidential. BMG Research, [NAME OF DATA PROVIDER] and Ofgem commit to safeguarding your privacy. Your name and address will not be shared with Ofgem.

How long will my smart meter data be retained for?

The anonymised energy consumption data shared as part of this research will be retained by BMG Research and Ofgem for 18 months following the receipt of the data, and will only be used for the research purposes explained.

Will my data ever be sold or used for commercial purposes?

No, the data accessed will be controlled by the BMG Research and Ofgem teams and will never be sold and will only be used for the research purposes described here.

What will happen to the results of the research?

Research supplier and Ofgem may publish the results of the research in a variety of reports or publications such as government research papers, academic journals, and at conferences. Individuals and households will not be identified in any publication.

Please now read the Data Protection Privacy Notice presented on the next screen to understand how your data will be kept secure and then complete the consent question.

Base: All with a smart meter AND from Norstat panel

PRIVACY NOTICE

BMG Respondent Privacy Notice

Who are we?

BMG Research is an independent social and market research company. We are registered in England with the company number 02841970. Our registered office is at Spring Lodge, 172 Chester Road, Helsby, Cheshire, WA6 0AR.

What is our Privacy Notice about and how does it relate to you?

You are likely to be reading this Privacy Notice because you have either taken part in one of our market research surveys or are considering taking part. This Privacy Notice explains what personal data we will collect from you in relation to the survey and what we will do with it.

In addition to the information stated in this Privacy Notice, BMG Research is bound by the Market Research Society Code of Conduct (http://www.mrs.org.uk; Tel: 0800 9759596) and we are wholly committed to meeting the requirements of the UK General Data Protection Regulation on data privacy.

Please read this Notice in order to ensure that you are happy with how its contents affect you. Participation in our market research surveys is entirely voluntary, and if you have conducted a survey we will take it to mean that you agree with the terms of this Notice. However, if you are not

happy with the terms of this Notice you should not participate in the survey, or if you have already participated you are still entitled to ask that part or all of your interview and/or personal details be destroyed or deleted and we will carry out such a request. We tell you below how to contact us.

Why have we contacted you and where did we get your details?

We carry out market and social research on behalf of our clients to gather and present the opinions of the public or businesses directly to the people making decisions about products, services or public policy. We never sell, market or promote any products or services that might be offered by our clients or third parties.

You will have been invited to take part in a survey through Norstat a market research panel company who have provided us with your details for the purpose of conducting research only.

Legal basis for processing personal data

The table below explains the legal basis for the collection, storage and use of personal data you may provide when taking part in a survey.

Collect method	Purpose	Source	Type of data processed	Legal basis
Surveys	▪ To assist our clients in understanding your views, opinions or behaviors to improve their services. ▪ To verify the answers, you provided in a recent survey. ▪ To get in touch with you to conduct follow up or ongoing surveys ▪ To administer prize draws or incentives	You provide us with this information directly.	Contact details, voice, opinions, demographics, various personal details, half hourly electricity consumption and tariff (optional, under specific consent) We keep this data for 12 months or longer if you consent to this.	Consent – We ask you to take part in a survey and add further consent to use your personal data.
Fraud Protection	▪ Providing protection for our business against fraudulent activity	You provide us with this information directly.	IP address, browser/device specifications, postal addresses, email addresses. We keep this data for 12 months.	Legitimate Interest – We have a legitimate interest to protect ourselves and our clients against fraudulent or illegal activities.
Survey duplication prevention	▪ Preventing numerous entries in surveys by	You provide us with this information directly.	IP address, browser/device specifications.	Legitimate Interest – We have a legitimate interest to protect ourselves and our

	the same person			clients against fraudulent or illegal activities.

What personal data do we collect?

We collect information through surveys conducted on the telephone, online, face to face or by post. We might also collect feedback and information from group interviews or workshops.

We only collect personal data about you that is relevant to the purpose of the particular survey we are conducting at that time. Personal data means your name, address, email address, telephone number or online identifier. Personal data can also include (but is not limited to) information about your age and gender, race or ethnicity, your religion or beliefs, political opinions, trade union membership and health (we will ask your explicit permission to collect any special category data), half hourly electricity smart meter data (we will ask your explicit permission to collect it).

Unless we indicate otherwise in the survey (for example, to say if the information is essential for the purpose of the survey), you may choose not to share that information with us.

We will protect the confidentiality of your information in accordance with our normal data handling procedures and all legal requirements. We will not use it for any purposes other than those which are set out in the surveys and in this Notice.

How do we use your personal data?

The data you provide as part of this research will be used for:

- For market research purposes, this includes carrying out analysis and producing reports on behalf of Ofgem who has commissioned the survey.
- For quality control purposes, for example ensuring that someone else in your household has not already submitted your address in order to take part in this research.
- To respond to feedback or complaints

What information is shared with the client who has commissioned the survey?

Survey results will be reported back to our client in an aggregated format, by that we mean that your responses will be combined with all other responses we have collected and shown as a total combined number or a percentage of the total.

We also share personal data that we have collected as part of the survey with the client in case-by case level format, but all information that would make you identifiable as an individual is removed. Only general, non-identifiable attributes are shared, for example, gender, age, and region of the UK. Within the survey you also have the right to refuse to provide any of this information.

Do we share your personal data with anyone else?

For this exercise of data linking we will need to share your data with a third party purely for the purpose of delivering market research services we cannot provide ourselves. In this case this is to administer:

- A large scale mailings for the follow up letter via a mailout provider
- Linking your energy consumption data through a data provider

How we keep your data secure

We are committed to keeping personal data secure and take all reasonable technical and organisational measures to protect personal data from unauthorised or unlawful processing, loss, misuse, destruction, damage or alteration.

Only authorised BMG employees and contractors or partners carrying out authorised business functions are allowed to access data or databases held by BMG Research.

We inform and update our employees about our policies and procedures regarding confidentiality, security and privacy, and we emphasise the importance of complying with them at all times. Our security procedures are consistent with or exceed generally accepted commercial standards used to protect personal data. BMG Research employees are required to sign a Confidentiality Agreement in which they agree to keep all project and respondent personal data confidential. Employees who violate the Confidentiality Agreement are subject to disciplinary actions, including termination of employment when appropriate. Any employee found to be in breach of the law will be reported to the relevant authorities.

We have contracts and agreements in place with all contractors or partners who have access to survey information. As a minimum these contracts and agreements require contractors and partners to keep any information we provide to them confidential; they are not permitted to use this information for any purpose other than to carry out the services they are contracted to on behalf of BMG Research.

Where is your data processed?

Your data is processed within the EU/European Economic Area (EEA).

If we need to, we may transmit and/or retain the information we gather from you outside of the EEA. It may also be handled by individuals working for us or one of our suppliers who are based outside of your area. If your personal data is transferred to, kept in, or otherwise processed outside of your country or territory, and that country or territory is not recognised as providing an appropriate level of privacy protection, we will take further steps to protect your personal data as required by law. (For example, if we need to process data outside of the European Economic Area, standard contractual terms will be utilised to provide the same level of assurance as if your data is processed inside of the EEA.)

Third party Data Processing

For the purposes of this exercise BMG Research may use external providers to process Personal Data. We select providers that have the appropriate technical and organisational controls and agree contractually to afford the same protection of the UK GDPR, should the data be processed outside of the EU/EEA. If the country where the data may be processed has not been recognised as providing an adequate level of data protection, we will put in place additional safeguards to protect your personal data, as required by applicable law.

In the case of this exercise we will use n3rgy.

n3rgy data service (https://www.n3rgy.com) is used by BMG Research to interface with the national smart meter systems in order to collect, store, manage and share with BMG Research your Smart Meter data. This service uses the Smart Energy Code (https://smartenergycodecompany.co.uk/) Party credentials and Party ID of N3RGY DATA LIMITED, incorporated and registered in England and Wales with the company number 11712674 whose registered office is at Prennau House Copse Walk, Pontprennau, Cardiff, Wales, CF23 8XH.

For how long do we keep your personal data?

We only keep your information for as long as is necessary. We will keep your personal data for a minimum of one year after the completion of the project; once deleted we will no longer hold any copies. If, at any time, you withdraw your consent to our processing your personal data, we will delete your personal data at that point and no copies will be held by BMG Research.

Consent can be withdrawn by emailing dataprotection@bmgresearch.com or calling +44 (0) 2030123401

Your rights

Your co-operation in market research surveys is voluntary at all times regardless of what the survey is about or who our client is.

You have the following rights in relation to your personal data

The right	**Explanation**
To be informed	We provide a privacy notice which explains our purpose for processing personal data
Of access	You have a right to know what personal data we hold, via a Subject Access Request
To rectification	Your right to have inaccurate personal data corrected
To erasure	Your right to have personal data deleted (the right to be forgotten). This right is not absolute, for example if we have a legal obligation to process the data
To restrict processing	In certain circumstances, you can limit the way we use your data
To data portability	Your right to have your data transferred from one data controller to another data controller
To object	In certain circumstances, you can object to us processing your data

You are entitled at any stage to ask that your personal data, or part or all of the record of your survey responses, be rectified, destroyed or deleted and we will carry out such a request. This can be requested during the interview itself or afterwards (using the contact details below).

If you submit a Subject Access Request, we may ask for verification of your identity before releasing any information to you.

If you have a complaint about how we collect or use your personal data that we have been unable to resolve, or if we do not respond to your request or do not provide you with a valid reason for our inability to do so, you have the right to file a complaint with the Information Commissioner's Office. They can be contacted via their website www.ico.org.uk or by phone at 0303 123 1113.

How to Contact us

If you want to exercise your rights as an individual (for example, to have your data corrected, updated, or deleted from our systems), please email dataprotection@bmgresearch.com. Please

provide any relevant references in your email so we can find you in our databases, such as the phone number we phoned you on or your address if one of our interviewers called you at home.

If you have any concerns regarding this Privacy Notice or you have a data privacy concern, please contact our Data Protection Officer at dataprotection@bmgresearch.com

Data Protection Officer

BMG Research

Ground Floor

Lancaster House 67 Newhall St Birmingham

B3 1NQ

Alternatively, you can contact Norstat support at support-uk@norstatpanel.com

Effective: 1st November 2024 May 2023

If you are happy to proceed, please move to the next page and complete the consent question.

Base: All with a smart meter AND from Norstat panel

SINGLE RESPONSE

S01_A. SMART CONSENT

Please select one option below.

Note that if you choose to consent, we will send you a copy of the information above by mail, including how to withdraw your consent if you change your mind.

Please select one only

Code	Answer list	Scripting notes	Routing
1	I have read and understood all the information provided, and I voluntarily consent to participate in the research.		
2	I do not wish to participate in the research.		**GO TO THE FINAL SURVEY COMPLETE PAGE**

Base: All consenting to S01

OPEN RESPONSE, POSTCODE FORMATTING & VALIDATION APPLIED

S02A. ADDRESS

Thank you. In order for BMG Research to access your energy data, we need to verify your address and smart meter details.

Enter your full postcode:

Please answer in the box below

[_____]

Enter your house/flat number as it appears on your utility bills. For example, if your address is 1 Example Street, you would enter "1" below:

Please answer in the box below

[_____]

PERFORM API CALL TO DCC USER DATABASE TO CHECK FOR VALID INVENTORY

Code	Answer list	Scripting notes	Routing
1	If valid postcode and address found		**GO TO S03**
2	If address not found (i.e. no valid smart meter)		**GO TO S02B**

Base: All without valid address at S02a

OPEN RESPONSE

S02B. MPAN

Sorry, there is no smart meter registered at this address. One other option for linking your data is to find your MPAN number. This number appears on your energy bill in the format shown below.

[Show example with MPAN circled in red]

We need the number circled in red.

Please enter your MPAN number below:

Please answer in the box below

[_____]

Code	Answer list	Scripting notes	Routing
97	I can't find my MPAN		**GO TO S02C**

PERFORM API CALL TO DCC USER DATABASE TO CHECK FOR VALID INVENTORY

Code	Answer list	Scripting notes	Routing
1	If valid MPAN found		**GO TO S03**
2	If MPAN not found (i.e. no valid smart meter)		**GO TO S02C**

Base: All without valid MPAN at S02b

TEXT ONLY

S02C. MANUAL CHECK

Sorry, we need either an address with a registered smart meter or an MPAN that appears on our database, and we have been unable to find either of these so far. These checks have been

automated, but we will do one final manual review of the information you have provided to see if we can match it against our database.

To do this, we will need you to fill out one final question, which follows this.

If we can match this, we will send you a letter to verify your address. Instructions on how this works will be provided at the end of the survey.

Base: All consenting to S01

SINGLE RESPONSE

S03. MOVE_IN_DATE_1

Have you moved into this address in the last 13 months?

Please select one only

Code	Answer list	Scripting notes	Routing
1	Yes		**GO TO S04. MOVE_IN_DATE_2**
2	No, I've lived here longer than 13 months		

Base: If have moved in during last 13 months at S03

OPEN RESPONSE, POSTCODE FORMATTING & VALIDATION APPLIED

S04. MOVE_IN_DATE_2

ON WHAT DATE DID YOU MOVE INTO [PIPE ADDRESS FROM ADDRESS_LOOKUP]? DATE CAN BE APPROXIMATE, IF UNSURE PROVIDE BEST ESTIMATE.

Please answer in the box below

[dd/mm/yyyy field with calendar option. Force entry]

Base: All consenting to S01

INFO PAGE

Thank you for the information so far. In order to verify your address we will post a letter to the one you have provided. This will be an invitation to scan a QR code or access a web address. Once you receive the letter, all you will need to do is scan the QR code or access a web address, and log in using a unique reference number provided on the letter.

This will take you to a survey page which asks you to confirm that you are located at the property and able to consent to provide the smart meter data.

And that's it, once you have verified your address using this method you will be credited 100 Norstat coins (worth £10) to your account.

Thank you for participating in the survey.

GOES TO THE FINAL SURVEY COMPLETE PAGE

Follow-up survey

INTRODUCTION

BMG Research is conducting research on behalf of Ofgem. You recently took part in an online survey which asked you about your views on your energy supplier and the wider energy market in the UK, it would have included questions on how you pay for your energy, your engagement in the energy market, and any steps you are taking to reduce energy consumption.

As part of this we asked you for your consent to link your energy consumption data with your responses in the survey. This is a follow up to that consent which verifies the address you provided for data linking as part of that process, and confirms you are happy for your data to be linked.

This will take around 1 minute to complete, and 100 Norstat coins (woth £10) will be credited to your Norstat account upon completion.

Please be assured that all data collected from you will be processed in adherence to the Market Research Society's Code of conduct, Data Protection law, and the survey Privacy Notice. To review information on how we process your energy consumption data and the terms of our privacy policy, please click here [hyperlink word "here" to https://bmgresearch.com/bmg-data-linking-terms-conditions/]. This information is also included in the letter you have received.

Please enter the unique reference number shown on your letter and click NEXT if you consent to the below statement.

I confirm my consent for BMG Research to retrieve my historical half hourly electricity consumption, export (when applicable) and tariff (if stored in my smart meter) for the purpose of linking this data to my survey responses given as part of the Ofgem survey conducted Feb-March 2026. For full terms and conditions click here [hyperlink word "here" to https://bmgresearch.com/bmg-data-linking-terms-conditions/]

Please enter your unique reference number in the box below

[_____]

Thank you for entering your reference number, that is all we need to confirm you are happy for your data to be linked and your address is correct. Your reward will be added to your account in due course.

THANK AND CLOSE