



CONSUMER SURVEY 2020

Technical Report for research conducted on behalf
of Ofgem

Prepared by: Ipsos MORI

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1 Survey methodology

1.1 2020 Consumer Survey

As has been the case in previous years, the consumer survey in 2020 comprised two elements – a main Great Britain (GB) wide survey and a boost survey. Boost interviews were conducted in Wales and Scotland to achieve a higher base size to enable further analysis within each country. In addition, this year, extra interviews were conducted among electric vehicle owners, solar panel owners, and those signed up to auto switching services in order to provide a larger base size for analysis among these groups. The following sections will provide more detail on the methodology for each element.

The main survey

Fieldwork for the main 2020 survey was carried out between 14th September and 6th November 2020. The survey transitioned from a face to face methodology to online this year, with surveys being completed among online survey panellists on the Ipsos i-say panel utilising Computer Assisted Web Interviewing (CAWI). To understand the impact of the methodological change, a Computer Assisted Telephone Interviewing (CATI) parallel run also took.

Within the main survey, interviews were carried out with 4608 gas and/or electricity consumers, including 3883 consumers with both mains gas and electricity, 49 (1% of the total sample) with mains gas only, and 676 (15% of the total sample) with mains electricity only. Overall, 3932 participants had mains gas, and 4559 had mains electricity.

Boost surveys

Two boost surveys were carried out in Wales and Scotland to increase the sample sizes within each country to allow further analysis. Total results for each country (including both the main and boost samples, which are reported in separate table sets to the main GB sample) were weighted based on the weighting schemes established in 2018¹.

Boost surveys were carried out among a number of consumer groups of interest – electric vehicle owners, those with solar panels and those signed up to auto switching services (services that scan the market and automatically switch customers to a better energy deal if there's one available). Total results for these groups (among the boost sample and natural fallout within the main sample) are also reported in separate table sets to the main GB sample, weighted to the same nationally representative weighting scheme as within the total GB sample set.

1.2 Sample universe and survey eligibility

The target sample was the same as at previous waves: domestic energy consumers who are responsible for their household energy bills. All participants were at least 16 years old, resident in Great Britain, and met the following eligibility criteria:

- having mains gas and/or mains electricity in their household;
- being solely or jointly responsible, for the gas and/or electricity bills in their household.

These criteria were applied through screening questions at the beginning of the survey. Consequently, the following groups were excluded from the sample:

- those living in a property where the landlord organised and paid the energy bills;
- those living in a household where another household member or members take responsibility for the bills (where the decision maker was unavailable – e.g. an adult still living at home where parents take responsibility paying for the bills);
- those dependent on a non-household member to manage bills on their behalf

¹ More details on the weighting method can be found in section 3.1.2 below



1.3 Sampling

Quota targets were used to ensure that the final achieved sample was nationally representative. Because we were interviewing someone in the household who is responsible/jointly responsible for the gas and electricity bills, age quotas were originally created from the head of household (HOH) profiles from GfK's Financial Research Survey². Separate quotas were also applied to region, working status and gender, in line with targets from previous years.

Quota group	Target proportion of interviews set %
16-34	19%
35-54	51%
55+	30%
Male	50%
Female	50%
Working full time	44%
Not working full time	56%
North East	4%
North West	11%
Yorkshire and the Humber	8%
East Midlands	7%
West Midlands	9%
East	10%
London	14%
South East	14%
South West	9%
Wales	5%
Scotland	9%

1.4 Wales / Scotland boosts

Fieldwork boosts were conducted in Wales and Scotland this year to increase the possibility for further analysis and reduce the confidence intervals associated with the survey estimates. An extra 180 interviews were conducted in Wales and 120 in Scotland.

Weighting targets were determined from data collected in 2018. Questions were run on omnibus surveys in each country by Beaufort (Wales) and Kantar TNS (Scotland), to determine accurate target populations of bill payers / partners within each nation³. Each sample was drawn to be representative

² GfK Financial Research Survey: A syndicated survey of financial holdings behaviour and attitudes based on a sample of 60,000 per year using mixed interview mode of face to face and online interviews.

³ A detailed breakdown of the resulting weighting targets can be found in the weighting section

of the individual nation, and stratified within the country based on constituencies. Participants were asked the two opening questions from the main survey (Q1 and Q2) and the demographic profile of those who would qualify for the main survey (have mains gas and / or electricity, and some responsibility for paying the bills) was recorded and used to weight the total sample for each home nation⁴.

Separate sets of tabulations were produced for Great Britain (main dataset only), for Wales and Scotland (with interviews from the main sample added to the boost and weighted to targets taken from the omnibus surveys, as outlined above), and for the three behavioural groups of interest (electric vehicle owners, solar panel owners and those signed up to auto switching services).

1.5 Telephone parallel run

In order to understand the impact of transitioning the survey to online on energy engagement metrics, a parallel telephone run took place in 2020. This was originally intended to be run face to face, but this was not possible given the COVID-19 related social distancing restrictions in place in summer 2020. Given the importance of the internet in comparing and switching, Ofgem was keen to understand the impact of an online sample (predominantly made up of heavier internet users) on results and engagement levels. 1635 interviews were conducted on the Ipsos MORI telephone omnibus among energy bill payers or their partners aged 16 and above in Great Britain. Quotas were set on age, gender, social grade and region, to ensure a sample representative of bill payers / partners, and mirroring the online sample.

The telephone questionnaire only included key questions from the full online questionnaire (covering key demographics, screening questions and engagement metrics).

2 Questionnaire design

The original questionnaire was designed by Ofgem and TNS BMRB (now Kantar Public) for the 2014 baseline study and evolved through the 2015 and 2016 surveys. The 2017 survey involved some significant revisions to the questionnaire, a process carried out by Ofgem and GfK in close collaboration. The survey transferred to Ipsos MORI in 2019, as part of the acquisition of some divisions of GfK. In 2020 Ofgem identified several new focus areas which resulted in significant questionnaire amendments. The changes made from 2019 - 2020 are outlined below.

The median interview length for the 2020 survey was 25 minutes.

2.1 Main questionnaire changes between 2019 to 2020

All changes to the questionnaire were logged throughout the development process. An outline of all changes (additions, amendments and deletions) made between 2019 and 2020, and a full version of the 2020 questionnaire and filters used, are provided in section 4.

2.1.1 New areas of interest

A number of questions were added in 2020 in order to explore several new issues which Ofgem had identified (question names are given in brackets below to enable their identification in the questionnaire):

- **Property details:** Ofgem identified a need to better understand several details about the household which would impact on energy usage: including age of the property (PROPAGE), the property type (PROPTYPE),
- **Achieving net zero carbon emissions:** With the need to achieve net zero carbon emissions by 2050, questions were added to measure uptake as well as consideration and barriers to

⁴ The full questionnaire can be found in the 2018 technical report [here](#)

consideration of several low carbon technologies and household items including electric / hybrid vehicles, smart meters, renewable energy (e.g. solar panels), home battery storage, smart technologies and renewable / low carbon heating systems (BCHECK; WHERECH; METHODS2BOOST; SM9; INTCONT1HC; INTCONT1EV; QHEAT1; QHEAT2; QCHANGES1; QCHANGES2; QEV2; QEV3)

- **Decarbonisation attitudes and behaviours:** Questions were added to measure understanding of terminology relating to decarbonising the economy and achieving net zero carbon emissions, understanding of the carbon contribution of different behaviours, uptake / likelihood to begin behaviours that incur fewer carbon emissions, and awareness of government policies in the area (DECARB1; DEARB 2; DEARB 4; DEARB 7)
- **Peak and off-peak energy periods:** Questions were added on consumer awareness of peak energy periods, understanding of what these meant for consumers, as well as uptake and likelihood to switch to one (PEAK 1; PEAK 2; PEAK 3; PEAK 3A; PEAK 4)
- **Financial impact of COVID-19:** Given the very different context in which the survey took place in 2020 compared to previous years, it was important to understand whether the COVID-19 pandemic had had an impact on household finances. A question was added to understand if any of a number of possible impacts (job loss, loss of income etc) had been experienced (QCOVID1)
- **Energy market engagement:** the survey still needed to track consumer engagement in the energy market. Questions measuring energy market engagement were simplified to cover gas and electricity in combination (COMPARE1; COMPARE 2; ENGAGE1; ENGAGE2; FIRSTTIME)

A fuller list of questionnaire changes this year can be found in section 4 of this report.

2.2 Cognitive testing

In order to develop the questions to be added into the survey in 2020, new questions were tested before launch. The testing consisted of **fifteen hour-long cognitive interviews** conducted by Ipsos MORI researchers to understand comprehension of question wording, key terms and any areas of difficulty. The cognitive interviews were carried out using online webinars and were conducted between 11th – 13th August 2020. Participants logged on to a secure webinar site which enabled the researcher to simultaneously share their computer screen with them to replicate as closely as possible what respondents would see on their screen in an online interview. The researcher worked through the full interview with the participant, with additional time taken during the interview to seek clarification, check comprehension of key questions, and better understand reasoning behind responses given. There was a particular focus on new or altered questions, and identifying areas of difficulty or ambiguity.

Participants were taken through twenty-seven questions from the updated questionnaire covering:

- Heating
- Electric vehicle and photovoltaic ownership
- Decarbonisation / climate change
- Comparing / switching tariff / supplier
- Ways of paying for and using energy e.g. tariffs including Time of Use tariffs, peak vs off-peak, smart appliances

Participants were recruited through an external recruitment agency, Criteria, with the following quotas set to ensure a spread of participant characteristics:

- Twelve from social grade ABC1 (those working in managerial, clerical or other professional roles) / twelve from social grade C2DE (those working in manual roles, doing casual work or those not in work (including those retired))
- Eight males / Eight females
- Five 18-34 year olds / five 35-54 year olds / five 55-74 year olds
- At least two consumers paying via pre-payment meter

- At least two consumers who had recently switched energy supplier in the past 12 months

Recruiters were asked to obtain a spread of life-stage, family status, property type, housing tenure, and working status: they did not work to hard (compulsory) quotas, so as to maximise the number of interviews that could be conducted in a short period of time, and also to gain a spread of responses. Interviewers were briefed by telephone before starting work, including briefing on a feedback version of the draft questionnaire they were asked to contribute to so as to collate feedback from the interviewers and their participants, and fed into questionnaire amendments.

A full annotated version of the questionnaire was then shared with Ofgem and changes to the questionnaire were agreed and signed off with Ofgem. A full PowerPoint report was also provided to Ofgem detailing some key learnings and findings from the cognitive testing exercise to inform any future questionnaire development exercises.

3 Analysis and reporting

3.1 Weighting

3.1.1 Main dataset

Rim weighting is an iterative process of correcting for biases in sub-groups of combined characteristics, such as age, gender and social grade to match to known population targets.

Weights for main 2020 dataset were the same as those used in previous years. These were developed in 2017 based on the profile of eligible respondents in the 2016 survey⁵, using the same variables (namely age and social grade within gender, working status within gender and Government Office Region). Weighted and unweighted profiles are shown below⁶.

Table 3.1 Weighted and unweighted profiles

	Weighted	Unweighted
AGE WITHIN SOCIAL GRADE		
ABC1		
16-34	9.6%	12.0%
35-64	36.8%	55.8%
65+	9.6%	10.2%
C2DE		
16-34	6.4%	3.3%
35-64	30.0%	16.0%
65+	7.5%	2.7%
WORKING STATUS		
Employed full time / Self employed	44.0%	42.9%
Employed part time	8.2%	9.4%
Not working	47.8%	47.7%
REGION		
NORTH EAST	4.2%	4.3%
NORTH WEST	11.3%	11.3%
YORKSHIRE AND THE HUMBER	8.5%	8.5%

⁵ Previous to this, the survey was run as part of an omnibus, so the weighting targets were based on weighting all cases to be nationally representative (based on age, social grade within gender, working status within gender and government office region), then filtering out ineligible respondents (those without responsibility for their household energy supply) from the dataset. As this was no longer possible once the survey was run as a bespoke survey, the weights developed through this process in 2016 have been used since.

⁶ More details on how the current weighting scheme was devised can be found in the 2017 technical report [here](#)

SCOTLAND	8.6%	7.4%
EAST MIDLANDS	7.5%	7.7%
WEST MIDLANDS	9.1%	9.1%
EAST	9.6%	10.1%
WALES	4.9%	4.8%
LONDON	13.5%	12.9%
SOUTH EAST	14.1%	14.4%
SOUTH WEST	8.8%	9.4%

3.1.2 Wales / Scotland Boosts

Unweighted and weighted sample profiles for the Wales and Scotland tabulations are shown below. Weighting targets were taken from the Beaufort and TNS Omnibus Surveys carried out in 2018.

GENDER	Wales		Scotland	
	Weighted	Unweighted	Weighted	Unweighted
Male	47%	46%	48%	46%
Female	53%	54%	52%	54%
AGE				
16-34	22%	16%	22%	18%
35-64	72%	76%	72%	74%
65+	6%	7%	6%	8%
SOCIAL GRADE				
AB	20%	34%	21%	43%
C1	28%	30%	35%	30%
C2	20%	12%	20%	12%
DE	32%	24%	24%	15%

3.2 Telephone parallel run

Following the completion of the telephone parallel run, the telephone and online samples were compared to see if there were any identifiable factors or differences in sample composition driving increased engagement among the online sample which could be used to control this within the tracking data. The profiles were checked at length, including segment make-up, demographic differences and responses for key indicators of engagement and action. While engagement was consistently higher among the online sample, engagement patterns across groups were found to be similar across both samples (i.e. the same groups were more likely to have engaged regardless of methodology), and there were no outlying groups found to be driving increased engagement within the online sample. Thus the decision was made not to apply any additional weights to the online sample.

3.3 Statistical significance

When using the survey results it is important to remember that not all differences are statistically significant. The participants who took part in the survey are only a sample of the total "population", so we cannot be certain that the figures obtained are exactly those that would have been reached if everyone had taken part (the "true" values).

For survey results based on a quota sampling approach, we can predict the variation between the sample results and the "true" values using the sample size and the result for each question. The confidence with which we can make this prediction is 95% - that is, the chances are 95 in 100 that the "true" value will fall within a specified range (the confidence interval). We can also test whether the difference between the results of two separate groups (e.g. the 2020 and 2019 surveys) are statistically significant. To be statistically significant, the difference must be greater than the 95% confidence interval.

Had the survey been based on a simple random sample we would have considered a difference of two percentage points or more to be significant at the $p < 0.05$ level (with slight variation according to the size of the proportions). However, as the all waves of the survey have been conducted using a quota sample, rather than a random probability sample, statistical differences are presented (both in the main report and on the accompanying data tables) on an indicative basis only.

3.4 Key definitions

Some of the key terminology used throughout both the written and technical reports is listed below:

- P12M engaged – switched supplier, tariff, or compared tariffs in the past 12 months
- P12M unengaged – none of the above actions in the past 12 months
- Ever switched – have ever switched supplier
- Never switched – have never switched supplier
- P12M switchers – switched supplier or tariff in past 12 months
- P12M supplier switchers – switched supplier in the last year
- P12M tariff switchers – switched tariff in the last year
- P12M comparers – compared supplier / tariff in the last year (but not switched)

3.5 Calculating overall results

The survey contains different versions of certain questions in order to capture differences between gas only consumers, electricity only consumers, those who use both on separate tariffs, and those who use both on a dual fuel tariff. Some variables in the tables and SPSS file are therefore based on two measures: one asked of gas or electricity only consumers, or those who have both from the same supplier or tariff, and one asked of those who have both gas and electricity from separate suppliers or tariffs. For these variables, results were calculated by averaging data across the two questions, to provide a single overall figure. The same approach was taken in 2019, 2018, 2017 and 2016.

Example of average result based on proportion of consumers – energy supplier (variable Q3 in the tables):

When calculating the proportion of consumers with each energy supplier, there were two separate questions:

- **Q3a.** Who is your household's current energy supplier; (*asked of respondents who have just gas or electricity supply, or if both have them from the same supplier*)
- **Q3b.** What are the names of your household's current gas and electricity suppliers; (*asked of respondents who have both gas and electricity from different suppliers*)

NB. for analysis purposes, the tables for Q3a and Q3b (table Q3) were rebased on **all** those who had a gas / electricity supply and are responsible for it.

Each consumer was asked only one of the questions based on whether they have a gas or electricity supply, or if both, whether these are on a dual fuel tariff. The table for Q3 combines responses at both questions to provide overall proportions for each supplier based on the total sample.

The below table shows metrics reported on that are calculated using the above approach.

Table 3.1 Examples of metrics which are calculated as % of consumers

Metric	Question Numbers
Energy supplier	Q3a / Q3b
Payment method	Q5a / Q5b

3.6 Segmentation

Cases from the 2020 dataset were allocated into the segmentation set up in 2017 using the allocation algorithm and a shortened question set⁷ as used in in previous years. The overall allocation efficiency was 78%. This means that 78% of cases were allocated into the same segment they would have been allocated to if they had completed the full segmentation questionnaire (and not only the shortened question set).

3.7 Accompanying data tables and SPSS

Supporting data tables, in MS Excel, showing full socio-demographic variations are published alongside the main and technical reports. These tables include statistical significance testing at the 95% level of confidence. Each question from the 2020 survey is presented against a series of analysis cross breaks (including standard demographics such as age and social grade, and survey-specific variables such as level of engagement, supplier type and segment). The data tables also include a set of tables showing each analysis cross break against the other analysis cross breaks. There are six sets of tables in 2020 – the main Great Britain dataset, (the 4608 sample), an all-Wales set (standard and boost Wales samples), all-Scotland set (standard and boost samples), then sets for behavioural groups (electric vehicle owners, solar panel owners and those signed up to auto switching services).

An SPSS data file is also available from Ofgem upon request. This provides participant level data for further analysis, and includes derived variables and cross breaks included in the main report and data tables (but excluding variables suppressed under the Utilities Act, Section 105).

⁷ See appendix 4.3

4 Questionnaire and filters

4.1 Changes and additions made to questionnaire between 2019 and 2020

Type/ description	Question name	2019	2020
Addition/ new question	<i>Year/ month</i>		What is your date of birth?
Addition/ new question	<i>GENDER_NONBINARY</i>		Which of the following describes how you think of yourself?
Addition/ new question	<i>QMKTSIZE_GB</i>		Where do you live?
Addition/ new question	<i>EMP01</i>		What is your personal current employment status?
Addition/ new question	<i>EU01HINC</i>		Are you the one in your household who has the highest income?
Addition/ new question	<i>UK01OCCR</i>		In which of the below categories does your occupation fall? If retired or unemployed, please indicate the category closest to your previous occupation.
Addition/ new question	<i>UK01OCCHI</i>		What is the occupation of the person with the highest income? If retired or unemployed, please indicate the category closest to his/her previous occupation
Additional into text	<i>INTRO1</i>	We would now like to ask you some questions about gas and electricity suppliers on behalf of Ofgem, the independent energy regulator for Great Britain.	We would now like to ask you some questions about gas and electricity suppliers on behalf of Ofgem, the independent energy regulator for Great Britain.

Type/ description	Question name	2019	2020
		To start with, a few questions to make sure we are speaking with the right people.	<p>To start with, a few questions to make sure we are speaking with the right people.</p> <p>In this survey, some questions will be about personal categories such as your household , employment status, and background. A “Prefer not to answer” option will be available for you to select, if you wish to use it.</p> <p>Ipsos has been commissioned by Ofgem to carry out this research and only Ofgem will have access to this anonymised data.</p> <p>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 12 months.</p> <p>Do you accept the collection of personal data?</p>
Question position moved	<i>TENURE</i>	Please tell us whether your home is...	Please tell us whether your home is...
Addition/ new question	<i>PROPTYPE</i>		What type of property does your household live in?
Addition/ new question	<i>PROPAGE</i>		When was this property built?
Addition/ new question	<i>VEHICLE</i>		Do you or any other members of your household have use of a car or van?
Addition/ new question	<i>BCHECK</i>		Can we check, does your household have any of these things?
Addition/ new question	<i>WHERECH</i>		Where do you usually charge your plug-in electric vehicle(s)?
Addition/ new question	<i>METHODS2BOOST</i>		And which, if any of these has your household signed up to?

Type/ description	Question name	2019	2020
New intro text	<i>INTRO2</i>		Next we'd like you to think a little about some issues that have been in the news recently.
Addition/ new question	<i>DECARB1</i>		How would you rate your understanding of what the following terms mean?
Addition/ new question	<i>DECARB2</i>		How big a part, if any, do you think the following activities play in human contribution to climate change in the UK over the past few years?
Addition/ new question	<i>DECARB4</i>		Thinking about things you and your household might do in order to limit your own contribution to climate change, how likely or unlikely would you be to make the following changes within the next few years?
Addition/ new question	<i>DECARB7</i>		The Government has introduced some new energy policies. Which, if any, of these changes that are coming to the UK have you heard of before today?
Addition/ new question	<i>Q3A</i>		Who is your household's current energy supplier?
Addition/ new question	<i>Q3B</i>		What are the names of your household's current gas and electricity suppliers?
Addition/ new question	<i>Q5A (formerly Q5)</i>		How does your household pay for your energy?
Addition/ new question	<i>Q5B (formerly Q6)</i>		How does your household pay for your gas and electricity? If you pay using different methods, please select both.
Amendment/ change to answer codes	<i>ENG</i>	Thinking about energy generally. To what extent do you agree or disagree with these things? STATEMENTS	Thinking about energy generally. To what extent do you agree or disagree with the following statements? STATEMENTS

Type/ description	Question name	2019	2020
		1.I understand how much energy is used around my home 2.I'm concerned about how much energy is used in our home 3. CODES 1. Disagree strongly 2. Disagree 3. Disagree slightly 4. Neither agree nor disagree 5. Agree slightly 6. Agree 7. Agree strongly 99. Don't know 98. Prefer not to say 99. Don't know	1.I understand how much energy is used around my home 2.I'm concerned about how much energy is used in our home 3.I think I'm doing enough myself to tackle the effects of climate change CODES 1. Disagree strongly 2. Disagree 3. Disagree slightly 4. Neither agree nor disagree 5. Agree slightly 6. Agree 7. Agree strongly 99. Don't know 98. Prefer not to say
Addition/ new question	<i>SM9 (formerly SM6)</i>		How likely or unlikely would you be to install a smart meter in the next two years?
Addition/ new question	<i>COMPARE1</i>		Have you or your household ever compared energy deals to see if you could switch to a different supplier or tariff?
Addition/ new question	<i>COMPARE2</i>		Have you or your household compared energy deals in the past 12 months to see if you could switch to a different supplier or tariff?
Addition/ new question	<i>ENGAGE1</i>		Which, if any, of these things have you or your household ever done?
Addition/ new question	<i>ENGAGE2</i>		And which, if any, of these have you or your household done in the past 12 months?

Type/ description	Question name	2019	2020
Addition/ new question	<i>FIRSTTIME</i>		Thinking about the last time you switched energy supplier, was that the first time you've ever done it, or have you switched energy supplier before in the past?
Routing/text substitution change	<i>Dummset</i>		SET PRIORITY OF WHICH RECENT EXPERIENCE TO ASK ABOUT IT MULTIPLE CODED, PRIORITY IS: A SWITCHED SUPPLIER P12M B SWITCHED TARIFF C COMPARED
Amendment/ change to answer codes	<i>Q161</i>	<p>DO NOT PROMPT</p> <p>And thinking about the last time you <answer from Dumm1>, what were the main reasons that caused you to do that?</p> <p>IF NECESSARY: Was it something that happened that made you start to think about it, or was there something that you saw or heard or read?</p> <p>INTERVIEWER INSTRUCTION: MULTIPLE CODE UP TO 3 RESPONSES</p> <p>1 I received a bill or direct debit \ prepayment statement from my supplier</p> <p>2 I received a price increase notice from my supplier</p> <p>3 I received an end of fixed term tariff notice from my supplier</p> <p>4 I received an annual summary or review from my supplier</p> <p>5 I received information about my energy consumption from my supplier</p>	<p>And thinking about the last time you <answer from Dumm1>, what were the main reasons that caused you to do that?</p> <p>Please select up to three answers</p> <p>1. I received a bill or direct debit \ prepayment statement from my supplier</p> <p>2. I received a price increase notice from my supplier</p> <p>3. I received an end of fixed term tariff notice from my supplier</p> <p>4. I received an annual summary or review from my supplier</p> <p>5. I moved home</p> <p>6. I saw / heard advertising / media coverage on energy suppliers</p> <p>7. Talked to a friend, family member, or neighbour</p> <p>97. Other - please type in</p> <p>98. Prefer not to say [EXCLUSIVE]</p> <p>99. Don't know [EXCLUSIVE]</p>

Type/ description	Question name	2019	2020
		<p>6 I saw a message on a communication from my supplier about how I could make savings by changing tariff or payment method with my current supplier</p> <p>7 I received another communication from my supplier</p> <p>8. I received a communication from another supplier</p> <p>10 I moved home</p> <p>14 I saw / heard advertising / media coverage on energy suppliers</p> <p>21. Prompted by energy scanning service or automated switching service (e.g. Auto Sergei, Moneysavingexpert/ Martin lewis Cheap Energy Club)</p> <p>20 Talked to a friend, family member, or neighbour</p> <p>97: Other - please type in</p> <p>98 Refused</p> <p>99 Don't know</p>	
Amendment/ change to answer codes	Q165	<p>DO NOT PROMPT</p> <p>And when you last <answer from Dumm1>, how did you find out about the deals offered?</p> <p>INTERVIEWER INSTRUCTION: MULTIPLE CODE AS MANY AS APPLY</p> <p>1: I used an online\website price comparison service (e.g. USwitch, Money Supermarket)</p> <p>2. Using an energy scanning service (e.g. Auto Sergei, Martin Lewis Cheap Energy Club)</p> <p>3: Using an automated switching service (e.g. Flipper, Voltz, Swuto, Energy Scanner)</p>	<p>When you last <ANSWER FROM DUMM1>, how did you find out about the deals offered?</p> <p>1: Using an online\website price comparison service (e.g. USwitch, Money Supermarket)</p> <p>2. Using an energy scanning service (e.g. Auto Sergei, Martin Lewis Cheap Energy Club)</p> <p>3: Using an automated switching service (e.g. Flipper, Voltz, Swuto, Energy Scanner)</p> <p>4: Rang my supplier</p> <p>6: Looked at my supplier's own website</p> <p>7: Looked at the websites of other suppliers</p>

Type/ description	Question name	2019	2020
		4: I rang my supplier 5: I rang other suppliers 6: I looked at my supplier's own website 7: I looked at the websites of other suppliers 8: I spoke to a supplier salesperson in the street/shopping centre \ public place 9: A friend or family member told me about it 9: A supplier salesperson knocked at my door 14: Through a collective (group) switching campaign organised by a third party (e.g. council\charity\housing association \ Big Switch, ready to switch etc.) 97: Other - please type in 98 Refused 99 Don't know	8. A friend or family member told me about it 97: Other - please specify 98: Prefer not to say [EXCLUSIVE] 99: Don't know [EXCLUSIVE]
Amendment/ change to answer codes	NOTSH	DO NOT PROMPT Are there any particular reasons why you have not <shopped around to see if there are any better energy deals /switched tariff or switched supplier>? CHOOSE ALL THAT APPLY. CODE FIRST MENTION THEN OTHER MENTIONS Cost/price 1. Existing supplier/tariff is satisfactory 2. Didn't think I'd save enough to make it worthwhile changing 3. Confident I'm on the best deal for me Quality / reliability – existing supplier	Are there any particular reasons why you have not <shopped around to see if there are any better energy deals /switched tariff or switched supplier>? Please select all codes that apply 1. Existing supplier/tariff is satisfactory 2. Didn't think I'd save enough to make it worthwhile changing 3. Confident I'm on the best deal for me 5. Good service from my existing supplier (including customer service, reliable supply etc) 6. Too much hassle/effort 96. Nothing specific 97. Other (specify) 99. Don't know [EXCLUSIVE] 98. Prefer not to say [EXCLUSIVE]

Type/ description	Question name	2019	2020
		<p>5. Good service from existing supplier (including customer service, reliable supply etc) Existing supplier characteristics</p> <p>7. Good reputation - existing supplier</p> <p>8. Green credentials - existing supplier</p> <p>Additional features / services of existing supplier</p> <p>10. Customer loyalty scheme (e.g. perks, reward points, vouchers, cashback)</p> <p>12. Energy bundled in with other services (e.g. telephone, credit card)</p> <p>13. Difficult to find information (include information about own tariffs/bills/usage/other suppliers)</p> <p>14. Don't understand /difficult to compare tariffs</p> <p>27. Because I receive special assistance from my supplier (e.g. help to read meters, bills in accessible format, on priority services register, receive warm home discount)</p> <p>Switching to alternative</p> <p>15. In debt to supplier</p> <p>16. Unable to switch- landlord won't allow</p> <p>17. Have smart meter/difficult to switch with smart meter</p> <p>Others</p> <p>20. Do not need to shop around as energy scanning/auto-switching service would say if a better deal is available</p> <p>21. Do not need to shop around as price cap will ensure I don't pay too much</p> <p>22. Don't want to risk switching because suppliers are going out of business</p> <p>General</p>	

Type/ description	Question name	2019	2020
		23. Not interested 24. Too complicated 25. All suppliers are much the same/no difference 26. Too much hassle/effort 96. Nothing specific 97. Other (specify) 99. Don't know 98. Prefer not to say	
Amendment/ change to answer codes	<i>RISKS</i>		What, if anything, do you think might be the risks associated with switching energy suppliers?
Amendment/ change to answer codes	<i>Q121</i>	How much do you agree or disagree...? i) Switching is a hassle that I've not got time for ii) I worry that if I switch things will go wrong iv) Switching energy suppliers takes too long vi) It's too hard to work out whether I would save or not if I switched vii) I would only consider switching to a large or well-known energy supplier viii) The fact that some suppliers have gone out of business puts me off switching ix) (if SM4=1 AND SM7 = 1/3) I worry that if I switch energy supplier my smart meter will stop working 1: Agree strongly 2: Tend to agree 3: Neither agree nor disagree 4: Tend to disagree 5: Disagree strongly 98: Refused	How much do you agree or disagree...? STATEMENTS 1. Switching is a hassle that I've not got time for 2. I would only consider switching to a large or well-known energy supplier 4. (if SM4=1 AND SM7 = 1/3) I worry that if I switch energy supplier my smart meter will stop working CODES 1: Agree strongly 2: Tend to agree 3: Neither agree nor disagree 4: Tend to disagree 5: Disagree strongly 98: Prefer not to say 99: Don't know

Type/ description	Question name	2019	2020
		99: Don't know	
Amendment/ change to answer codes	CONF2	<p>How confident or unconfident do you feel about doing these things related to energy suppliers?</p> <p>i. Comparing the different energy deals available ii. Choosing the best energy deal for your household iii. Making a complaint to your energy supplier, if you had a reason to complain</p> <p>1: Very confident 2: Fairly confident 3: Neutral 4: Not very confident 5: Not confident at all 98: Refused</p>	<p>How confident or unconfident do you feel about doing these things related to energy suppliers?</p> <p>STATEMENTS</p> <p>1. Comparing the different energy deals available 2. Choosing the best energy deal for your household</p> <p>CODES</p> <p>1: Very confident 2: Fairly confident 3: Neutral 4: Not very confident 5: Not confident at all 98: Prefer not to say 99: Don't know</p>

Type/ description	Question name	2019	2020
		99: Don't know	
Amendment/ change to answer codes	Q68	<p>To what extent do you trust or distrust your energy supplier to...?</p> <p>i) Treat you fairly in their dealings with you ii) Provide clear and helpful information for you iii) Charge you a fair price for your gas and electricity</p> <p>1: Completely trust 2: Tend to trust 3: Neither trust nor distrust 4: Tend to distrust 5: Strongly distrust 98: Refused 99: Don't know</p>	<p>To what extent do you trust or distrust your energy supplier(s) to...?</p> <p>STATEMENTS</p> <p>1. Treat you fairly in their dealings with you 3. Charge you a fair price for your gas and electricity</p> <p>CODES</p> <p>1: Completely trust 2: Tend to trust 3: Neither trust nor distrust 4: Tend to distrust 5: Strongly distrust 98: Prefer not to say 99: Don't know</p>
Amendment/ change to answer codes	SPATT	<p>To what extent do you agree or disagree with these statements about energy suppliers</p> <p>ii. I would be wary of using an energy supplier I have never heard of iii. If I was going to change energy supplier, I would look for a supplier who offered me extra rewards iv. I would be happy to pay slightly more for my energy if my supplier offered me better customer service</p> <p>1: Agree strongly 2: Tend to agree 3: Neither agree nor disagree</p>	<p>To what extent do you agree or disagree with these statements about energy suppliers</p> <p>STATEMENTS</p> <p>1. If I was going to change energy supplier, I would look for a supplier who offered me extra rewards 2. I would be happy to pay slightly more for my energy if my supplier offered me better customer service</p> <p>CODES</p> <p>1: Agree strongly 2: Tend to agree</p>

Type/ description	Question name	2019	2020
		4: Tend to disagree 5: Disagree strongly 98: Refused 99: Don't know	3: Neither agree nor disagree 4: Tend to disagree 5: Disagree strongly 98: Prefer not to say 99: Don't know
Addition/ new question	<i>PEAK</i>		<p>The cost of energy is lower during certain times of the day, when there is less demand, so it costs suppliers less to get the energy to your household.</p> <p>These times are known as off-peak times, in contrast to peak times when demand is higher, and energy costs more.</p> <p>Before today, were you aware that there are peak and off-peak times for energy usage?</p>
Addition/ new question	<i>PEAK2</i>		And what time(s) of day do you understand as being peak time for energy usage?
Addition/ new question	<i>PEAK3</i>		Is your household on a tariff where you pay less for energy used off peak, called a 'time of use' tariff?
Addition/ new question	<i>PEAK3A</i>		Has your household ever been offered a 'time of use' tariff where you pay less for energy used off peak?
Addition/ new question	<i>PEAK4</i>		<p>And if a time of use tariff was available, how likely would your household be to switch to it?</p> <p><IF SM7 <> 1/3 Your household would need to have a smart meter installed and> to gain any</p>

Type/ description	Question name	2019	2020
			benefits from the tariff you would need to make sure you reduce the amount of energy your household uses at peak times.
Amendment/ change to question wording	<i>WHENAPP</i>	Which of these do you tend to use on weekdays between 4pm and 8pm?	Now thinking about the hours of 4pm-8pm on weekdays, which of these appliances do you tend to use at these times?
Amendment/ change to question wording	<i>LOADSH</i>	How easy or difficult would it be for your household to change when you do these things to a time when there is less demand for energy ((e.g. to the middle of the day or overnight)?	How easy or difficult would it be for your household to change when you do these things to different times of the day (outside of 4pm - 8pm). Again, please think about how you could use appliances nowadays.
Amendment/ change to question wording	<i>WHATPRE</i>	Can you tell me a bit about what prevents your household from being able to <do washing/drying/run the dishwasher/charge your electric vehicle> at a time when there is less demand for energy (e.g. to the middle of the day, or overnight)?	Can you describe in a bit more detail what prevents your household from being able to do this (IF CODE 4 OR 5 FOR ONLY ONE ITEM AT LOADSH) / these things (IF CODE 4 OR 5 FOR MORE THAN ONE ITEM AT LOADSH) at a different time of day (outside of 4-8pm)?
Amendment/ change to question title	<i>INTCONT1APP</i>		<p>Smart appliances, for example a washing machine, could be linked to an external company, such as your energy supplier. The external company would monitor when the cost of energy falls, and with your agreement would remotely control when your appliance runs.</p> <p>To use the appliance you would load it and set it as ready, and the external company would start the appliance when the cost of energy falls.</p> <p>(IF NECESSARY: You could still use the appliance in the same way as usual, by loading</p>

Type/ description	Question name	2019	2020
			<p>it up and turning it on to run; or you could use a timer or app yourself to programme when it would run).</p> <p>[If have an EV = APPLIANCE = 6] You could also use this type of system to charge your electric vehicle.</p> <p>How likely would you be to use appliances like this to reduce the cost of your household's energy bills?</p>
Addition/ new question	<i>INTCONT1HC</i>		<p>Smart controls for home heating could be linked to an external company, such as your energy supplier. The external company would monitor when the cost of energy falls, and with your agreement would remotely control your home heating.</p> <p>You would set your home's heating timer and thermostat to the temperature you prefer. The external company may reduce the temperature on your thermostat by one or two degrees for a short period of time at peak times to manage demand on the energy network at busy times. The difference should be very small and should not be noticeable, and in return your household would receive a small financial reward in the form of a cheaper energy tariff or a credit on your energy bill.</p> <p>You could still over-ride this by turning the thermostat back up.</p>

Type/ description	Question name	2019	2020
			<p>How likely would you be to use a home heating system like this to reduce the cost of your household's energy bills?</p>
Addition/ new question	<i>INTCONT1EV</i>		<p>Smart controls for charging plug-in electric vehicles at home could be linked to an external company, such as your energy supplier. The external company would monitor when the cost of energy falls, and with your agreement would remotely control how quickly and when your vehicle charges.</p> <p>You would plug in your vehicle to charge in the usual way. The external company may slow down the amount of power being used to charge the vehicle, or stop it altogether for a certain time period to help them to manage demand on the energy network at busy times.</p> <p>The vehicle would still be ready for you to use when you need it because you would have told the supplier how much battery charge you need and when you need it.</p> <p>In return your household would receive a small financial reward in the form of a cheaper energy tariff or a credit on your energy bill.</p> <p>How likely would you be to use a system like this to charge your electric vehicle in order to reduce the cost of your household's energy bills?</p>

Type/ description	Question name	2019	2020
Amendment/ change to answer codes	<i>WHYCOMF</i>	<p>Why do you say you would feel <INTCOMF = 1 / 2->comfortable/ INTCOMF = 4/5 ->uncomfortable/ INTCOMF = 3 ->neither comfortable nor uncomfortable> about using the service we've just discussed? (IF NECESSARY: This is a service where you would allow an external company to control when household appliances run)</p> <p>Type in verbatim Don't know</p>	<p>Why do you say you would feel uncomfortable about using the service we've just discussed? (This is a service where you would allow an external company to control when household <SUBSTITUTE DEPENDING ON WHICH QUESTIONS ASKED ABOVE appliances or heating run or when plug-in electric vehicles charge>)</p> <ol style="list-style-type: none"> 1. Concerns around data sharing 2. Wouldn't trust external company with this information 3. Concerns around cost of appliances 4. Concern that the company may not switch the appliance on/things wouldn't be done 5. Concerns about when they would switch it on/like to run appliances when I'm at home (e.g. risk of fire, flooding, noise) 6. Concerns around internet access / using it / I do not have internet access 7. Other reason (please specify) 98. Prefer not to say [EXCLUSIVE] 99. Don't know [EXCLUSIVE]
Addition/ new question	<i>QHEAT1</i>		Which of the following types of household heating systems had you heard of before today?
Addition/ new question	<i>QHEAT2</i>		Which is the main heating system that your household uses to heat the majority of your home in winter? Is it...

Type/ description	Question name	2019	2020
Addition/ new question	<i>CHANGES1</i>		Thinking realistically, how likely are you or your household to do these things?
Addition/ new question	<i>CHANGES2</i>		Is there anything in particular that stops you and your household from <MAKING CHANGES AT CHANGES>?
Addition/ new question	<i>QEV2</i>		How likely would you be to change your household's car or van to an electric or plug-in hybrid one in the next five years?
Addition/ new question	<i>QEV3</i>		Why do you say your household is unlikely to change to an electric or plug-in hybrid car or van in the next five years?
New intro wording	<i>INTRO10</i>	Now some questions about you and your household, so we can look at your answers alongside those of other people like you.	Now some questions about you and your household, so we can look at your answers alongside those of other people like you. Please note: some of the following questions may be considered personal. We would like to remind you that your participation is strictly voluntary and that your responses are used for research purposes only. The answers that you provide will be presented in aggregate form and none of them will be linked back to you in any way. All data will be collected and processed in adherence to the Market Research Society's Code of Conduct and the General Data Protection Regulation (GDPR).

Type/ description	Question name	2019	2020
Addition/ new question	<i>UK02ETH.</i>		Some questions can be sensitive in nature. We would like to remind you that your participation is strictly voluntary and that your responses are used for research purposes only. A “Prefer not to answer” option is available for you to select, if the case. What is your ethnic group?
Addition/ new question	<i>UK02EDU</i>		What is your highest level of education attained?
Amendment/ change to answer codes	<i>Q133I</i>	Do you receive any of the following tax credits or social security benefits? Please include those you receive personally or jointly with your partner/spouse PLEASE SELECT ALL THAT APPLY 1. Not receiving any benefits or credits (SINGLE CODE ONLY) 2. Child Benefit 3. Child Tax Credit 4. Council Tax Benefit/Council Tax Reduction 5. Disability Living Allowance or Personal Independence Payment (PIP) 6. Employment and Support Allowance (ESA) 7. Guardian’s Allowance 8. Housing Benefit 9. Incapacity Benefit 10. Income Support	Do you receive any of these? Please include those you receive personally or jointly with your partner/spouse. PLEASE SELECT ALL THAT APPLY 1. Child Benefit 2. Any Tax Credit (e.g. Child Tax Credit, Working Tax Credit) 3. Any means tested benefit (e.g. Universal Credit, Housing/Council Tax Benefit, Income Support, Jobseeker’s Allowance) 4. Warm Home Discount 5. Registered for the energy and water priority services register 6. Other benefits or schemes (please specify) 7. None of these 98: Prefer not to say [EXCLUSIVE] 99: Don't know [EXCLUSIVE]

Type/ description	Question name	2019	2020
		11. Jobseeker's Allowance 12. State Retirement Pension (including Widow's Pension or Bereavement Allowance) 13. Pension Credit 14. Universal Credit 15. Working Tax Credit 16. Carers Allowance 17. Winter Fuel Allowance 18. Warm Home Discount 19. Registered for the energy and water priority services register 20. Other benefits (please specify) 98: Refused 99: Don't know	
Addition/ new question	<i>COVID1</i>		As a result of the COVID pandemic, have any of these happened to you or your household?
Amendment/ change to answer codes	<i>ADULTS1</i>	How many ADULTS aged between 16 and 64 are there in your household? ENTER NUMBER 98. Refused 99. Don't know	We would like to look at your answers alongside those from other households like yours. Which, if any, of these groups of people live in your household? 1. Any children aged under 5 2. Any children aged 5-15 3. Any adults aged 65+ 4. None of these [EXCLUSIVE] 5. Don't know [EXCLUSIVE]

4.2 Deletions made to questionnaire between 2019 – 2020

<i>Question number</i>	<i>Question</i>
Q3	Who is your current gas supplier?
Q4	Who is your current electricity supplier?
Q151	Who is your current gas and electricity supplier?
Q5	How to you pay for your gas?
Q6	How to you pay for your electricity?
Q9	Interviewer code, was that...
APPRX	And can I check, is that the actual amount you pay, or an approximation?
Q10	Do you primarily manage your <gas/ electricity/ gas and electricity> account online or via an app? This would include things like submitting meter readings, checking your energy use or changing your direct debit.
Q13	Do you pay different amounts for your energy depending on when you use it because you are on one of the following meters or tariffs?
SM1	Before today had you heard of smart meters?
SM6	Since receiving a smart meter, to what extent...
Q14	Which of the following do you think it is possible for energy customers to do?
Q21	How many times, if at all, have you ever switched your gas supplier?
Q138	When did you last switch gas supplier?

Q22	How many times, if at all, have you ever switched your electricity supplier?
Q139	When did you last switch electricity supplier?
Q154	Thinking about the last time you switched an energy supplier , which of these did you do?
TMESG	How many times if at all, have you ever switched your gas tariff?
WHNSG	When did you last switch gas tariff?
TMESE	How many times if at all, have you ever switched your electricity tariff?
WHNSE	When did you last switch electricity tariff?
SWITCH	Thinking about the last time you switched an energy tariff which of these did you do?
CHNGG	Thinking about your gas supply, which if any of these have you done in the past 12 months?
CHNGE	Thinking about your electricity supply, which if any of these have you done in the past 12 months?
Q160	Thinking of the last time you <answer from Dumm1> , what were your priorities?
MAINP	And which of these was your main priority the last time you <answer from Dumm1>?
NOTIF	You mentioned earlier that you signed up to <IF METHODS2 = 3> an auto switching service/ IF METHODS2 = 2 > an energy scanning service>. Can I check, have you received any notifications from them about energy deals in the past 12 months?
Q156	Thinking of the last time you <answer from Dumm1> how did you switch?
PCWSW	Did you actually complete the switch through the <online price comparison service/scanning service/automatic switching service>, or did you find out information from them and then complete the switch in some other way (e.g. calling the supplier you wanted to switch to)?

HELPS	Did anyone who doesn't live with you go through or help you through the switching process on your behalf? If so, who?
Q157	Thinking of the last time you <answer from Dumm1>, how much do you agree or disagree with the statement? "I found it easy to decide which deal to switch to"
Q158	Thinking of the last time you <answer from Dumm1>, taking into account every part of the process, from considering switching to the switch completion, how much do you agree or disagree with the statement? "I found the process of switching easy"
Q159	To what extent do you agree or disagree with the following statement: "The last time I switched supplier, I had sufficient control over the date I would actually be switched over"
Q166	To the best of your knowledge, do you feel that you are now paying less than you would have if you had not <answer from Dumm1>?
Q123	Thinking of the factors that matter most to you, how confident are you that you are currently on the best gas deal for you?
Q124	Thinking of the factors that matter most to you, how confident are you that you are currently on the best electricity deal for you?
TRIED	Can I just check, in the past 12 months have you tried to switch gas or electricity supplier but have been unable to for some reason?
DESCR	Which, if any of these describe what happened?
Q73	Thinking about the range of different tariffs available to you from energy suppliers, would you say that you have...?
Q60	To what extent do you trust or distrust your gas supplier(s) to...?
Q64	Now thinking about your electricity supplier... To what extent do you trust or distrust your electricity supplier to...?
Q68	To what extent do you trust or distrust your energy supplier to...?
Q59	How satisfied or dissatisfied are you with the overall service you receive from your current gas supplier?

Q63	How satisfied or dissatisfied are you with the overall service you receive from your current electricity supplier?
Q67	How satisfied or dissatisfied are you with the overall service you receive from your current energy supplier?
RECGAS	On a scale of 0 to 10 when 0 is not at all likely and 10 is extremely likely, how likely would you be to recommend your current gas supplier to a friend or colleague?
RECELEC	On a scale of 0 to 10 when 0 is not at all likely and 10 is extremely likely, how likely would you be to recommend your current electricity supplier to a friend or colleague?
RECENERGY	On a scale of 0 to 10 when 0 is not at all likely and 10 is extremely likely, how likely would you be to recommend your current energy supplier to a friend or colleague?
Q76	In the last 12 months, have you or anyone in your household contacted a current or previous energy supplier to complain at all?
Q81	Excluding any comment about their prices, do you believe your household has had cause to complain to an energy supplier in the last year, but has not done so?
NOTCM	Why did your household not make a complaint at that time?
QCAP1	In the past year, a new energy price cap known as the default tariff price cap was introduced. Before today, had you heard of this?
QCAP2	Do you think that your household's energy prices are currently covered under the default tariff price cap?
IMPACTCAP	Which of these best describes how the default energy price cap makes you feel about switching energy suppliers?
GGSAVE	How likely would you be to change when your household uses appliances or charges electric vehicles if this meant you could save £x per year on your energy bills?
INTCONT1	How likely would you be to use appliances like this to reduce the cost of your household's energy bills?

Q120	For which, if any, of the following services have you switched your provider in the last 12 months?
Q129	Can I check, is English your first or main language?
Q130	What is the highest level of education you have completed? Please select one answer only.
Q133	This card shows incomes in weekly, monthly and annual amounts. Which of the groups on the card represents your personal\you and your husband's\wife's\ partner's combined income before any deductions such as income tax or National Insurance? Please include income from earnings, self-employment, benefits, pensions, and interest from savings. Just tell me the letter beside the row that applies to you.
ARREA2	Can I check, have you or anyone else in your household sought any advice or assistance to help to manage paying your household's energy bills from any of these places?
QPPM3	Can you tell me a little more about the circumstances that led to you being disconnected from your [INSERT FUEL TYPE CODED @ QPPM1] supply in the last year?
Q135	Have you moved house in the last 12 months?
ADULTS1	How many ADULTS aged between 16 and 64 are there in your household?
ADULTS2	How many ADULTS aged 65 or older are there in your household?
CHILD1	Are there any children in the household of these ages?
WORK	Are you personally...

4.3 Segmentation question set

ASK ALL

Q1. To what extent do you agree or disagree with the following statements?

- i. As soon as I see a problem or challenge I start looking for possible solutions
- ii. I am able to follow through with things once I've made up my mind to do something
- iii. I usually continue to search for an item until it reaches my expectations
- iv. I am usually among the first to try a new product when it appears on the market
- v. I always check bank or building society statements when I get them, including online

- 1. Agree strongly
- 2. Agree
- 3. Agree slightly
- 4. Neither agree nor disagree
- 5. Disagree slightly
- 6. Disagree
- 7. Disagree strongly
- 99. Don't know/Refused

ASK ALL

Q2. To what extent do you agree or disagree with the following statements?

- i. Price comparison websites all have the same energy deals on them
- ii. Price comparison websites are unbiased in the way they display energy deals
- iii. Switching is a hassle that I've not got time for
- iv. If I was going to change energy supplier, I would look for a supplier who offered me extra rewards
- v. I would be happy to pay slightly more for my energy if my supplier offered me better customer service

- 1: Agree strongly
- 2: Tend to agree
- 3: Neither agree nor disagree
- 4: Tend to disagree
- 5: Disagree strongly
- 99. Don't know/Refused

ASK ALL

Q3. How confident or unconfident do you feel about doing things related to energy suppliers?

- i. Comparing the different energy deals available

- 1: Very confident
- 2: Fairly confident
- 3: Neutral
- 4: Not very confident
- 5: Not confident at all
- 99: Don't know / Refused

ASK ALL

Q4a/b/c. To what extent do you trust or distrust your gas/electricity/energy supplier to...?

- i. Treat you fairly in their dealings with you
- ii. Charge you a fair price for your gas/electricity/energy

- 1: Completely trust
- 2: Tend to trust
- 3: Neither trust nor distrust
- 4: Tend to distrust
- 5: Strongly distrust
- 99: Don't know / Refused / Not Answered

4.4 Full 2020 Questionnaire

OFGEM CONSUMER SURVEY 2020 Questionnaire

Base: F0: All respondents

YEAR/MONTH.

SINGLE CODE

What is your date of birth?

- YEAR
- _1910 1910
- ...
- _2015 2015
- MONTH
- _1 January
- _2 February
- _3 March
- _4 April
- _5 May
- _6 June
- _7 July
- _8 August
- _9 September
- _10 October
- _11 November
- _12 December

[STOP INTERVIEW IF <16 YEARS]

Base: F0: All respondents

GENDER_NONBINARY.

SINGLECODE

Which of the following describes how you think of yourself?

- _1 Male
- _2 Female
- _3 In another way
- _4 Prefer not to answer

Base: F0: All respondents

QMKTSIZE_GB

SINGLE CODE

Where do you live?

Please note: This question may be considered personal. We would like to remind you that your participation is strictly voluntary and that your responses are used for research purposes only. The answers that you provide will be presented in aggregate form and none of them will be linked back to you in any way. All data will be collected and processed in adherence to the Market Research Society's Code of Conduct and the General Data Protection Regulation (GDPR).

Postcode

Postal Town

Prefer Not to Answer

Base: F0: All respondents

EMP01.

SINGLE CODE

What is your personal current employment status?

Select only one

- _1 Employed full-time
- _2 Employed part-time
- _3 Self employed
- _4 Unemployed but looking for a job
- _5 Unemployed and not looking for a job/Long-term sick or disabled
- _6 Full-time parent, homemaker
- _7 Retired
- _8 Student/Pupil
- 98: Prefer not to say
- 99: Don't know

Base: F0: All respondents

EU01HINC.

SINGLE CODE

Are you the one in your household who has the highest income? [person with the largest income from employment, pensions, state benefits, investments or other sources]

Select only one

- _1 Yes
- _2 Yes, together with another household member
- _3 No

Base: F171. Main / joint main income earner (EU01HINC = 1 or 2)

[Standard Screener: DO NOT MODIFY OR TRANSLATE]

UK01OCCR.

SINGLE CODE

In which of the below categories does your occupation fall? If retired or unemployed, please indicate the category closest to your previous occupation.

Select only one

- USE UK01OCCR response list

Base: F172. Not main / joint main income earner (EU01HINC = 3)

UK01OCCHI.

SINGLE CODE

What is the occupation of the person with the highest income? If retired or unemployed, please indicate the category closest to his/her previous occupation.

Select only one

- USE UK01OCCHI response list

UK01SG [HIDDEN]. HIDDEN QUESTION: SOCIAL GRADE

- _1 A - Upper middle class
- _2 B - Middle class
- _3 C1 - Lower middle class
- _4 C2 - Skilled working class
- _5 D - Working class
- _6 E - Lower level of subsistence

Base: F0: All respondents

INTRO1

We would now like to ask you some questions about gas and electricity suppliers on behalf of Ofgem, the independent energy regulator for Great Britain.

To start with, a few questions to make sure we are speaking with the right people.

In this survey, some questions will be about personal categories such as your household, employment status, and background. A "Prefer not to answer" option will be available for you to select, if you wish to use it.

Ipsos has been commissioned by Ofgem to carry out this research and only Ofgem will have access to this anonymised data.

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 12 months.

Do you accept the collection of personal data?

1. Yes, I accept
2. No, I do not accept [STOP INTERVIEW]

Base: F0: All respondents

Q1

SINGLE CODE

DO NOT ROTATE CODES

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

- 1: Mains gas only
- 2: Mains electricity only
- 3: Mains gas and electricity
- 4: Neither
- 98: Prefer not to say
- 99: Don't know

Base: F1: Q1 = Codes 1-3 (Has gas and/or electricity supply)

Q2

SINGLE CODE

DO NOT ROTATE

Are you responsible or jointly responsible for the gas and / or electricity bills in your household?
If your landlord organises and pays the energy bills, please answer 'No'.

- 1: Yes, me alone
- 2: Yes, me and someone else (e.g. partner, housemate) jointly
- 3: No [STOP INTERVIEW]
- 98: Prefer not to say [STOP INTERVIEW]
- 99: Don't know [STOP INTERVIEW]

Base: F1: Q1 = Codes 1-3 (Has gas and/or electricity supply)

DUMHH [HIDDEN]

SINGLE CODE

CODE TALKING ABOUT INDIVIDUAL ALONE, OR AS PART OF HOUSEHOLD AS FOLLOWS:

Q2 = 1 -> INDIVIDUAL

Q2 = 2 -> JOINTLY WITH HOUSEHOLD

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

TENURE

SINGLE CODE

DO NOT ROTATE

Please tell us whether your home is...

1. Being bought on a mortgage
2. Owned outright by household
3. Rented from Local Authority
4. Rented from private landlord
5. Rented from Housing Association
6. Other
98. Prefer not to say
99. Don't know

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

PROPTYPE

SINGLE CODE

DO NOT ROTATE

What type of property does your household live in?

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
9. Other (please specify)
98. Prefer not to say
99. Don't know

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

PROPAGE
SINGLE CODE
DO NOT ROTATE

When was this property built?

By that we mean when was the original building built, even if it was extended or converted later. If you're not sure, please give us your best estimate.

1. Before 1919
2. 1919-1929
3. 1930-1949
4. 1950-1989
5. 1990 -1999
6. 2000 or later
98. Prefer not to say
99. Don't know

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

VEHICLE
SINGLE CODE
DO NOT ROTATE

Do you or any other members of your household have use of a car or van?

Please include company cars or vans if they are available for private use by your household.

1. Yes
2. No
98. Prefer not to say
99. Don't know

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

BCHECK
MULTIPLE CODE

Can we check, does your household have any of these things?

PLEASE CHOOSE ALL THAT APPLY

1. A hybrid car or van that you do not plug in to charge (that charges from the engine alone)
(IF VEHICLE = CODE 1)

2. A plug-in hybrid car or van (that charges from the engine, but that you can also plug in to charge) (IF VEHICLE = CODE 1)
 3. A fully electric car or van (does not charge from the engine, has to be plugged in to charge) (IF VEHICLE = CODE 1)
 4. Solar panels (PV/photovoltaic – to generate electricity)
 5. Solar panels (water heating)
 6. Home battery storage for electricity (eg. Tesla Powerwall)
 7. None of these [EXCLUSIVE]
98. Prefer not to say [EXCLUSIVE]
 99. Don't know [EXCLUSIVE]

Base: F175: BCHECK=2/3 (Have plug in electric vehicle)

WHERECH
 SINGLE CODE
 DO NOT ROTATE

Where do you usually charge your plug-in electric vehicle(s)?

1. From home, using my electric charging point
2. From home, from the mains
3. Public chargepoint on my street or nearby
4. Public chargepoint on the motorway
5. Public chargepoint at the supermarket
6. Public chargepoint at a car park
7. Other public charging location
98. Prefer not to say [EXCLUSIVE]
99. Don't know [EXCLUSIVE]

BASE: MAIN SAMPLE: ONLY ASK IF DEMOGRAPHIC QUOTA FAIL ; BOOST SAMPLE: ASK ALL

METHODS2BOOST
 MULTI CODE
 DO NOT ROTATE CODES

And which, if any of these has your household signed up to?

1. 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)
2. Using an auto-switching service that automatically switches you on to a better energy deal if there's one available (e.g. Flipper, WeFlip, Lookaftermybills, Switchcraft, Switchd, Migrate)
3. None of these [EXCLUSIVE]
98. Prefer not to say [EXCLUSIVE]
99. Don't know [EXCLUSIVE]

SCRIPTER: IF OTHER QUOTA FAILS (AGE, GENDER, REGION), PLEASE ALLOCATE PARTICIPANTS TO BOOST GROUPS AS FOLLOWS (MUTICODE POSSIBLE)
BCHECK = 3 ALLOCATE TO EV BOOST GROUP
BCHECK=4 ALLOCATE TO SOLAR PANEL BOOST GROUP
METHODS2BOOST=2 ALLOCATE TO AUTOSWITCH BOOST GROUP

MAIN SURVEY STARTS BELOW

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

INTRO2

Before we start to speak about energy, we would like to ask a few questions about you personally. The first few questions are about whether and how you like to shop around for major service providers or for major purchases - not just for energy.

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

EMPOW

SINGLE CODE PER STATEMENT

SHOW ONE STATEMENT (1-5) PER SCREEN

ALTERNATE ORDER OF ANSWER LIST

To what extent do you agree or disagree with the following statements?

STATEMENTS

1. As soon as I see a problem or challenge I start looking for possible solutions
2. I am able to follow through with things once I've made up my mind to do something
3. I usually continue to search for an item until it reaches my expectations
4. I am usually among the first to try a new product when it appears on the market
5. I always check bank or building society statements when I get them, including online

CODES

1. Disagree strongly
2. Disagree
3. Disagree slightly
4. Neither agree nor disagree
5. Agree slightly
6. Agree

- 7. Agree strongly
- 98. Prefer not to say [FIX AT END]
- 99. Don't know [FIX AT END]

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

TRUST

SINGLE CODE PER ORGANISATION

SHOW ONE ORGANISATION (1-4) PER SCREEN

ROTATE ORDER OF ORGANISATIONS

ALTERNATE ORDER OF ANSWER LIST

We will now show you a list of different organisations. To what extent do you personally trust or distrust each to be fair in the way they deal with customers and citizens?

ORGANISATIONS

1. Energy suppliers
2. Internet/broadband suppliers
3. Banks/building societies
4. Insurance companies

CODES

1. Completely trust
 2. Tend to trust
 3. Neither trust nor distrust
 4. Tend to distrust
 5. Completely distrust
98. Prefer not to say
99. Don't know

Decarbonisation

Next we'd like you to think a little about some issues that have been in the news recently.

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

DECARB1

SINGLECODE PER ITEM

ONE ITEM PER SCREEN

ROTATE ORDER OF ITEMS

How would you rate your understanding of what the following terms mean?

ITEMS

1. Net zero carbon emissions

2. Greenhouse gas emissions
3. Decarbonisation

CODES

1. I have a good understanding of this term
2. I have a fair understanding of this term
3. I have a little understanding of this term
4. Just heard the term, don't know much
5. I have never heard of this term before
98. Prefer not to say
99. Don't know

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)DECARB2

DECARB2

SINGLECODE PER ITEM

ONE ITEM PER SCREEN

ROTATE ORDER OF ITEMS

USE SLIDER

How big a part, if any, do you think the following activities play in human contribution to climate change in the UK over the past few years?

ITEMS

1. Exhaust emissions from trains, planes, cars, lorries
2. Burning coal, oil and gas in power stations to produce electricity
3. Heating and cooling our homes

CODES – SHOW AS SLIDER WITH 7 POINT SCALE. LABEL ENDS AS SHOWN

1. A lot
- 2.
- 3.
- 4.
- 5.
- 6.
7. Nothing at all
98. Prefer not to say
99. Don't know

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

DECARB4

SINGLECODE PER ITEM
ONE ITEM PER SCREEN
ROTATE ORDER OF ITEMS

Thinking about things you and your household might do in order to limit your own contribution to climate change, how likely or unlikely would you be to make the following changes within the next few years?

ITEMS

1. Driving a car less and instead travelling by other means (e.g. public transport, walking, cycling)
2. Not flying, or replacing some flights with train or bus journeys
3. Saving energy at home (e.g. switching off lights, turning down a heating thermostat)
4. Saving energy at home by improving home's energy performance (e.g. better insulation, replacing doors/windows)
5. Installing new home heating systems that produce fewer greenhouse gases (e.g. efficient electric heating)
6. Using a wholly electric vehicle instead of a vehicle that uses petrol/diesel

CODES

1. I am already doing this as much as I possibly can
2. Definitely will
3. Probably will
4. Might or might not
5. Probably will not
6. Definitely will not
7. Not applicable (PLEASE AMEND AS SHOWN BELOW)
 - FOR ITERATION 1/6 Not applicable, no car/not intending to get a car
 - FOR ITERATION 2 Not applicable
 - FOR ITERATION 3/4/5 Not applicable, tenant or no control over improvements to property
98. Prefer not to say
99. Don't know

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

DECARB7

SINGLECODE PER ITEM
ONE ITEM PER SCREEN
ROTATE ORDER OF ITEMS

The Government has introduced some new energy policies. Which, if any, of these changes that are coming to the UK have you heard of before today?

ITEMS

1. From 2025 new build homes will no longer be built with gas central heating and must have high performance insulation. Instead, properties will need to be built with energy efficient electric heating or other types of heating.
2. This year the Government has introduced the Green Homes Grant, a new scheme to provide financial assistance to people who want to make their properties more energy efficient.
3. Coal fired power stations will be phased out by 2024.
4. From 2035 it will only be possible to buy new electric cars in the UK, not cars powered by petrol or diesel cars or vans in the UK.

CODES

1. Yes, I am definitely aware
2. I think I am aware / know some
3. I definitely am not aware
98. Prefer not to say
99. Don't know

Suppliers and tariffs

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

INTRO3

Now some more questions specifically about energy suppliers.

Here, we are interested in the energy supply to your household, and how your household chooses and uses energy.

Base: F2: Q1 = Code 3 AND Q2 = Codes 1 or 2 (Has gas and electricity supply and responsible for it)

Q150

SINGLE CODE

DO NOT ROTATE

Is your household's gas and electricity supplied by the same energy supplier?

1: Yes

- 2: No
- 98: Prefer not to say
- 99: Don't know

Base: F173: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 AND Q150 <> 2/98/99 (Has gas and/or electricity supply and responsible for it and (if both) has both from same supplier))

Q3A
SINGLE CODE
DO NOT ROTATE

Who is your household's current energy supplier?

- 1. British Gas
- 2. EDF
- 3. EON
- 4. Npower
- 5. Scottish Power
- 6. SSE

- 7. Avro Energy
- 8. Bulb energy
- 9. Green Network Energy Limited
- 10. Octopus Energy Limited
- 11. OVO Energy
- 12. Shell Energy (formerly First Utility)
- 13. Utilita
- 14. Utility Warehouse
- 15. Other (specify)
- 98. Prefer not to say
- 99. Don't know

Base: F174: Q150 = 2/98/99 (gas and electricity from different suppliers)

Q3B
MULTI CODE
DO NOT ROTATE

What are the names of your household's current gas and electricity suppliers?

- 1. British Gas
- 2. EDF
- 3. EON
- 4. Npower

5. Scottish Power
6. SSE

7. Avro Energy
8. Bulb energy
9. Green Network Energy Limited
10. Octopus Energy Limited
11. OVO Energy
12. Shell Energy (formerly First Utility)
13. Utilita
14. Utility Warehouse
15. Other (specify)
98. Prefer not to say [EXCLUSIVE]
99. Don't know [EXCLUSIVE]

Base: F173: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 AND Q150 <> 2/98/99 (Has gas and/or electricity supply and responsible for it and (if both) has both from same supplier)

Q5A

SINGLE CODE

DO NOT ROTATE

How does your household pay for your energy?

- 1: Monthly / quarterly direct debit (where your supplier takes the same amount of money from your bank account automatically)
- 2: Pay by cheque, cash or card on receipt of your bill
- 3: Prepayment meter (where you top up credit onto a key or card, or online, or using an app)
- 97: Other – please specify
- 98: Prefer not to say
- 99: Don't know

Base: F174: Q150 = 2/98/99 (gas and electricity from different suppliers)

Q5B

MULTI CODE

DO NOT ROTATE

How does your household pay for your gas and electricity? If you pay using different methods, please select both.

- 1: Monthly / quarterly direct debit (where your supplier takes the same amount of money from your bank account automatically)
- 2: Pay by cheque, cash or card on receipt of your bill
- 3: Prepayment meter (where you top up credit onto a key or card, or online, or using an app)

97: Other – please specify

98: Prefer not to say [EXCLUSIVE]

99: Don't know [EXCLUSIVE]

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

Q8

SINGLE CODE – RESPONDENT SHOULD SELECT ONLY ONE CODE (A-D) ACROSS THE ENTIRE TABLE, NOT PER COLUMN

Please indicate how much you spend on home energy: that is electricity and mains gas if you have it.

You can answer per year, per quarter, per month or per week, but this should be on average across the whole year, including the winter.

	Per week	Per month	Per quarter	Per Year
A	£13	Up to £58	Up to £174	Up to £700
B	£14-23	£59-100	£175-300	£701-£1200
C	£23-29	£100-124	£301-374	£1201-£1500
D	£30+	£125+	£375+	£1501+

98: Prefer not to say

99: Don't know

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

ENG

SINGLE CODE PER STATEMENT

SHOW ONE STATEMENT (1-3) PER SCREEN

ROTATE ORDER OF STATEMENTS

Thinking about energy generally.

To what extent do you agree or disagree with the following statements?

STATEMENTS

1. I understand how much energy is used around my home
2. I'm concerned about how much energy is used in our home
3. I think I'm doing enough myself to tackle the effects of climate change

CODES

1. Disagree strongly
2. Disagree
3. Disagree slightly
4. Neither agree nor disagree
5. Agree slightly
6. Agree
7. Agree strongly
98. Prefer not to say
99. Don't know

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

INTRO4

TEXT SUBSTITUTION

DISPLAY ENERGY TYPE <gas / electricity / gas and electricity> BASED ON FOLLOWING:

Gas = F3: Q1 = CODE 1 AND Q2 = CODES 1 OR 2 (HAS GAS ONLY SUPPLY AND RESPONSIBLE FOR IT)

Electricity = F4: Q1 = CODE 2 AND Q2 = CODES 1 OR 2 (HAS ELECTRICITY ONLY SUPPLY AND RESPONSIBLE FOR IT)

Gas and electricity = F5: Q1 = CODE 3 AND Q2 = CODES 1 OR 2 (HAS GAS AND ELECTRICITY SUPPLY AND RESPONSIBLE FOR IT)

The next few questions are about your energy tariff. An energy tariff is the pricing plan for the <gas / electricity / gas and electricity> that you use.

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

Q11

SINGLE CODE

DO NOT ROTATE

TEXT SUBSTITUTION

DISPLAY ENERGY TYPE <gas / electricity / gas and electricity> BASED ON FOLLOWING:

Gas = F3: Q1 = CODE 1 AND Q2 = CODES 1 OR 2 (HAS GAS ONLY SUPPLY AND RESPONSIBLE FOR IT)

Electricity = F4: Q1 = CODE 2 AND Q2 = CODES 1 OR 2 (HAS ELECTRICITY ONLY SUPPLY AND RESPONSIBLE FOR IT)

Gas and electricity = F5: Q1 = CODE 3 AND Q2 = CODES 1 OR 2 (HAS GAS AND ELECTRICITY SUPPLY AND RESPONSIBLE FOR IT)

DISPLAY RESPONSE CODES BASED ON FOLLOWING:

1. Yes, gas only = F3 OR F5

- 2. Yes, electricity only = F4 OR F5
- 3. Yes, gas and electricity = F5

A fixed term tariff is a tariff that has a definite end date and you pay a set rate per unit of energy. Are you on a fixed term tariff for <gas / electricity / gas and electricity>?

These tariffs often state the length in their name, such as a 12 months fix, or a March 2021 fix.

- 1: Yes, gas only
- 2: Yes, electricity only
- 3: Yes gas and electricity
- 4: No
- 98: Prefer not to say
- 99: Don't know

SMART METERS

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

INTRO5

Now there's a few questions about smart meters.

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

SM4

SINGLE CODE

Does your household have a smart meter?

- 1: Yes
- 2: No
- 98: Prefer not to say
- 99: Don't know

Base: F129: SM4 = Code 1 (Has a smart meter)

SM7

SINGLE CODE

Of the two energy meters described below, which is most similar to the one in your home?

Meter A	Meter B
Monitors energy use	Monitors energy use
Automatically sends readings of how much energy has been used in your home to your supplier	You or someone else in your household personally send readings of how much energy has been used in your home to your supplier, OR someone from your supplier visits your home to take meter readings
Shows how much energy has been used in pounds and pence on a display or an app or online account	<u>Does not</u> show how much energy has been used in pounds and pence on a display or an app or online account
Has been installed in the last five years	Was installed more than five years ago
If you prepay for energy, you can top-up via your mobile or online <ONLY SHOWN TO F140: Q5A/B = CODE 3 (PPM)>	If you prepay for energy, you must top-up at a PayPoint, Post Office or other shop <ONLY SHOWN TO F140: Q5A/B = CODE 3 (PPM)>

1. Meter A
 2. Meter B
 3. We have both types of meters in my/ourhome
- 98: Prefer not to say
99: Don't know

Base: F155: SM7 = Code 2 (Does not have smart meter type A)

SM9

SINGLE CODE

DO NOT ROTATE CODES

How likely or unlikely would you be to install a smart meter in the next two years?

- 1: Definitely would
 - 2: Probably would
 - 3: Might or might not
 - 4: Probably would not
 - 5: Definitely would not
- 98: Prefer not to say
99: Don't know

ENGAGEMENT

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

INTRO6

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

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

METHODS

MULTIPLE CODE

DO NOT ROTATE CODES

Which of these ways to compare energy deals and switch energy suppliers have you ever heard of?

1. Switching direct with the supplier (e.g. by phone, on their website)
2. Through a price comparison website (e.g. GoCompare, ComparetheMarket, 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)
4. Using an auto-switching service that automatically switches you on to a better energy deal if there's one available (e.g. Flipper, WeFlip, Lookaftermybills, Switchcraft, Switchd, Migrate)
5. None of these [EXCLUSIVE]
98. Prefer not to say [EXCLUSIVE]
99. Don't know [EXCLUSIVE]

Base: F145: METHODS = Codes 3 OR 4 (Aware of scanning or auto switching)

METHODS2

MULTI CODE

DO NOT ROTATE CODES

And which, if any of these has your household signed up to?

ONLY SHOW THOSE AWARE OF AT METHODS

1. 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)
2. Using an auto-switching service that automatically switches you on to a better energy deal if there's one available (e.g. Flipper, WeFlip, Lookaftermybills, Switchcraft, Switchd, Migrate)
3. None of these [EXCLUSIVE]

98. Prefer not to say [EXCLUSIVE]

99. Don't know [EXCLUSIVE]

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

COMPARE1

SINGLE CODE

Have you or your household **ever** compared energy deals to see if you could switch to a different supplier or tariff? <IF Q1 = CODES 1 OR 3: This could be for either a gas or electricity supplier.>

1. Yes

2. No

98. Prefer not to say

99. Don't know

Base: F157: COMPARE1 = Code 1 (yes) (have ever compared deals)

COMPARE2

SINGLE CODE

Have you or your household compared energy deals **in the past 12 months** to see if you could switch to a different supplier or tariff? < if Q1 = Codes 1 OR 3: This could be for either a gas or electricity supplier.>

1. Yes

2. No

98. Prefer not to say

99. Don't know

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

ENGAGE1

MULTIPLE CODE

DO NOT ROTATE CODES

Which, if any, of these things have you or your household **ever** done? < if Q1 = Codes 1 OR 3: This could be for either a gas or electricity supplier.>

1. Switched energy **supplier** – You could have switched direct with the supplier, through a price comparison website, or through an automated switching service (e.g. Flipper, Weflip)

2. Switched or renewed energy **tariff**, staying with same supplier

3. None of the above [EXCLUSIVE]

98. Prefer not to say [EXCLUSIVE]

99. Don't know [EXCLUSIVE]

Base: F158: ENGAGE 1 = Codes 1 OR 2 (Have ever engaged)

ENGAGE2

MULTIPLE CODE

DO NOT ROTATE CODES

And which, if any, of these have you or your household done **in the past 12 months**? < if Q1 = Codes 1 OR 3: Again, this could be for either a gas or electricity supplier.>

ONLY SHOW THOSE SELECTED AT ENGAGE1

1. Switched energy **supplier** – You could have switched direct with the supplier, through a price comparison website, or through an automated switching service (e.g. Flipper, Weflip)
2. Switched or renewed energy **tariff**, staying with same supplier
3. None of the above [EXCLUSIVE]
98. Prefer not to say [EXCLUSIVE]
99. Don't know [EXCLUSIVE]

Base: F159: ENGAGE2 = Code 1 (switched energy supplier in past 12 months)

FIRSTTIME

SINGLE CODE

Thinking about the last time you switched energy supplier, was that the first time you've ever done it, or have you switched energy supplier before in the past?

- 1: It was the first time
- 2: I've switched energy supplier before in the past
- 98: Prefer not to say
- 99: Don't know

Base: F160: COMPARE 2 = Code 1 OR ENGAGE 2 = Codes 1 OR 2 (Compared suppliers or tariffs in the past 12 months OR switched gas or electricity supplier or tariff)

Dummset [HIDDEN]

SINGLE CODE

SET PRIORITY OF WHICH RECENT EXPERIENCE TO ASK ABOUT

IF MULTIPLE CODED, PRIORITY IS:

- A SWITCHED SUPPLIER P12M (1)
- B SWITCHED TARIFF P12M (2)
- C COMPARED DEALS P12M (3)

Set selected variable as Dumm1

ALL RESPONDENTS SHOULD BE CODED 1-3/96

QUESTION NOT TO BE ASKED

PAST 12 MONTHS:

- 1: switched supplier = QENGAGE2 = 1

2: switched tariff = QENGAGE2 = 2 ONLY (AND NOT CODE 1)

3: compared energy deals = (QCOMPARE2 = 1) AND (QENGAGE2 <> 1 OR 2)

96: None of these = (QENGAGE2 <> 1/ 2) AND (QCOMPARE2 <> 1)

Base: F160 COMPARE 2 = Code 1 OR ENGAGE 2 = Codes 1 OR 2 (Switched gas or electricity supplier or tariff, or compared suppliers or tariffs in the past 12 months)

Q161

MULTIPLE CODE

DO NOT ROTATE

MAX 3 ANSWERS

RECORD ORDER

SUBSTITUTE IN FROM DUMM1

And thinking about the last time you <answer from Dumm1>, what were the main reasons that caused you to do that?

Please select up to three answers

1. I received a bill or direct debit \ prepayment statement from my supplier
2. I received a price increase notice from my supplier
3. I received an end of fixed term tariff notice from my supplier
4. I received an annual summary or review from my supplier
5. I moved home
6. I saw / heard advertising / media coverage on energy suppliers
7. Talked to a friend, family member, or neighbour
97. Other - please type in
98. Prefer not to say [EXCLUSIVE]
99. Don't know [EXCLUSIVE]

Base: F160: COMPARE 2 = Code 1 OR ENGAGE 2 = Codes 1 OR 2 (Compared suppliers or tariffs in the past 12 months OR switched gas or electricity supplier or tariff)

Q165

MULTIPLE CODE

DO NOT ROTATE

SUBSTITUTE IN FROM DUMM1

When you last <ANSWER FROM DUMM1>, how did you find out about the deals offered?

- 1: Using an online\website price comparison service (e.g. USwitch, Money Supermarket)
- 2: Using an energy scanning service (e.g. Auto Sergei, Martin Lewis Cheap Energy Club)

- 3: Using an automated switching service (e.g. Flipper, Voltz, Swuto, Energy Scanner)
- 4: Rang my supplier
- 6: Looked at my supplier's own website
- 7: Looked at the websites of other suppliers
- 8. A friend or family member told me about it
- 97: Other - please specify
- 98: Prefer not to say [EXCLUSIVE]
- 99: Don't know [EXCLUSIVE]

Base: F176: (QCOMPARE2 = 1) AND (QENGAGE2 <> 1/ 2) (compared energy deals in past 12 months but not switched supplier or tariff) or (QCOMPARE2 <> 1) AND (QENGAGE2 <> 1/ 2) (have not compared or switched in past 12 months)

NOTSH

MULTIPLE CODE

RECORD ORDER

TEXT SUBSTITUTION:

If Dummset = 96 then use -> shopped around to see if there are any better energy deals

If Dummset = 3 then use -> switched tariff or switched supplier

Are there any particular reasons why you have not <shopped around to see if there are any better energy deals /switched tariff or switched supplier>?

Please select all codes that apply

- 1. Existing supplier/tariff is satisfactory
- 2. Didn't think I'd save enough to make it worthwhile changing
- 3. Confident I'm on the best deal for me
- 5. Good service from my existing supplier (including customer service, reliable supply etc)
- 6. Too much hassle/effort
- 96. Nothing specific
- 97. Other (specify)
- 99. Don't know [EXCLUSIVE]
- 98. Prefer not to say [EXCLUSIVE]

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

Q125

SINGLE CODE

ALTERNATE ORDER OF ANSWER LIST

Thinking of the factors that matter most to you, how confident are you that you are currently on the best energy deal for you?

- 1: Very confident
- 2: Fairly confident
- 3: Neutral

- 4: Not very confident
- 5: Not confident at all
- 98: Prefer not to say [FIX AT END]
- 99: Don't know [FIX AT END]

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

INTRO3C

The next few questions are about your views on comparing and switching energy supplier more generally.

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

Q145

SINGLE CODE

ALTERNATE ORDER OF ANSWER LIST

How easy or difficult do you believe it is to compare different tariffs for electricity or gas?

- 1: Very easy
- 2: Fairly easy
- 3: Neither easy nor difficult
- 4: Fairly difficult
- 5: Very difficult
- 98: Prefer not to say [FIX AT END]
- 99: Don't know [FIX AT END]

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

PCWST

SINGLE CODE PER STATEMENT

RANDOMISE STATEMENTS

SHOW ONE STATEMENT PER SCREEN

To what extent do you agree or disagree with the following statements about price comparison websites?

STATEMENTS

- 1. Price comparison websites all have the same energy deals on them
- 2. Price comparison websites are unbiased in the way they display energy deals

CODES

- 1: Agree strongly

- 2: Tend to agree
- 3: Neither agree nor disagree
- 4: Tend to disagree
- 5: Disagree strongly
- 98: Prefer not to say
- 99: Don't know

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

RISKS

MULTIPLE CODE

RANDOMISE CODES

What, if anything, do you think might be the risks associated with switching energy suppliers?

- 1. Something might go wrong and I might get cut off
- 2. Might not save as much as I thought
- 3. Costs might go up
- 4. The supplier I switch to might go bust
- 5. Double/shock billing (I might be billed by both suppliers)
- 96. No risks [EXCLUSIVE AND FIX AT THE END]
- 97. Other risk (please specify) [EXCLUSIVE AND FIX AT THE END]
- 98. Prefer not to say [EXCLUSIVE AND FIX AT THE END]
- 99. Don't know [EXCLUSIVE AND FIX AT THE END]

Supplier perceptions

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

INTRO3D2

To what extent do you agree or disagree with the following statements about energy suppliers?

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

Q121

SINGLE CODE FOR EACH STATEMENT

RANDOMISE STATEMENTS

ONE STATEMENT PER SCREEN

How much do you agree or disagree...?

STATEMENTS

1. Switching is a hassle that I've not got time for
2. I would only consider switching to a large or well-known energy supplier
4. (if SM4=1 AND SM7 = 1/3) I worry that if I switch energy supplier my smart meter will stop working

CODES

- 1: Agree strongly
- 2: Tend to agree
- 3: Neither agree nor disagree
- 4: Tend to disagree
- 5: Disagree strongly
- 98: Prefer not to say
- 99: Don't know

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

CONF2

SINGLE CODE FOR EACH STATEMENT

RANDOMISE STATEMENTS

ONE STATEMENT PER SCREEN

How confident or unconfident do you feel about doing these things related to energy suppliers?

STATEMENTS

1. Comparing the different energy deals available
2. Choosing the best energy deal for your household

CODES

- 1: Very confident
- 2: Fairly confident
- 3: Neutral
- 4: Not very confident
- 5: Not confident at all
- 98: Prefer not to say
- 99: Don't know

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

ENERGYOOB

MULTIPLE CODE
DO NOT ROTATE

Have you heard anything about energy companies going out of business recently?

1. Yes, it happened to me/us
2. Yes, it happened to a close friend/family member/someone we know of
3. Yes, have just heard about it [EXCLUSIVE]
4. No, have not heard about it [EXCLUSIVE]
98. Prefer not to say [EXCLUSIVE]
99. Don't know [EXCLUSIVE]

Base: F147: ENERGYOOB = Codes 1-3 (Aware of energy companies going out of business)

IMPACTENERGYOOB
SINGLE CODE
DO NOT ROTATE

Which of these best describes how knowing that some energy suppliers have gone out of business makes you feel about switching energy suppliers?

1. Makes me much less likely to switch energy supplier in the future
2. Makes me a bit less likely
3. Makes no difference either way
4. Makes me a bit more likely
5. Makes me much more likely to switch energy supplier in the future
98. Prefer not to say
99. Don't know

Base: F148: ENERGYOOB = Code 1 (went through energy company failure themselves)

EXPENERGYOOB
OPEN ENDED

You mentioned that an energy supplier you used went out of business. Would you be able to describe in a bit more detail about that?

- What happened?
- How did you find out about it?
- Can you describe any information you received?
- How was the process for you?
- How are things now?

- Are you happy with your new energy deal?
- Are you happy with the customer experience from your new supplier?
- How are things now?

TYPE IN

- 98. Prefer not to say
- 99. Don't know

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

INTRO7

We would now like to ask you some questions about your attitudes to your own and other energy suppliers.

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

Q68

SINGLE CODE FOR EACH STATEMENT
RANDOMISE STATEMENTS
ONE STATEMENT PER SCREEN

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

STATEMENTS

1. Treat you fairly in their dealings with you
3. Charge you a fair price for your gas and electricity

CODES

- 1: Completely trust
- 2: Tend to trust
- 3: Neither trust nor distrust
- 4: Tend to distrust
- 5: Strongly distrust
- 98: Prefer not to say
- 99: Don't know

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

SPATT

SINGLE CODE FOR EACH STATEMENT

RANDOMISE STATEMENTS

ONE STATEMENT PER SCREEN

To what extent do you agree or disagree with these statements about energy suppliers

STATEMENTS

1. If I was going to change energy supplier, I would look for a supplier who offered me extra rewards
2. I would be happy to pay slightly more for my energy if my supplier offered me better customer service

CODES

- 1: Agree strongly
- 2: Tend to agree
- 3: Neither agree nor disagree
- 4: Tend to disagree
- 5: Disagree strongly
- 98: Prefer not to say
- 99: Don't know

TIME OF USE

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

Changing the subject now to think about different types of tariff and ways of paying for energy.

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

PEAK

SINGLE CODE

The cost of energy is lower during certain times of the day, when there is less demand, so it costs suppliers less to get the energy to your household.

These times are known as off-peak times, in contrast to peak times when demand is higher, and energy costs more.

Before today, were you aware that there are peak and off-peak times for energy usage?

- 1. Yes, I was aware of this
- 2. No, I was not aware of this
- 98: Prefer not to say
- 99: Don't know

Base: F163: PEAK = Code 1 (Aware of peak and off-peak periods)

PEAK2 MULTICODE

And what time(s) of day do you understand as being peak time for energy usage?
Please click on all of the boxes you think correspond to the hours which you think are peak time.

SHOW DAY AS 24 SINGLE HOUR TIME PARTS: LABELLED AS MIDNIGHT, 1AM MIDDAY,
1PM, 2PM

- 98: Prefer not to say [EXCLUSIVE AND FIX AT END]
- 99: Don't know [EXCLUSIVE AND FIX AT END]

Base: F163: PEAK = Code 1 (Aware of peak and off-peak periods)

PEAK3 SINGLE CODE

Energy costs different amounts to generate at different times of the day, so some suppliers have introduced 'Time of use' energy tariffs.

These charge consumers cheaper rates for their energy at certain times of night or day, when demand is at its lowest, and higher rates at popular times. This means that energy demand can be better managed, and customers can lower their bills.

Is your household on a tariff where you pay less for energy used off peak, called a 'time of use' tariff?

- 1. Yes
- 2. No
- 98: Prefer not to say
- 99: Don't know

Base: F165: PEAK= Code 1 AND PEAK3<> Code 1(Aware of peak and off-peak periods and household not on a time of use tariff)

PEAK3A

SINGLE CODE

Has your household ever been offered a 'time of use' tariff where you pay less for energy used off peak?

1. Yes, and we are in the process of switching
 2. Yes, and we declined to switch
 3. No, never been offered
- 98: Prefer not to say
99: Don't know

Base: F166: PEAK = Code 1 AND PEAK3 <> code 1 AND PEAK3A <> 1 (Aware of peak and off-peak periods and not on a time of use tariff and not in the process of switching)

PEAK4

SINGLE CODE

ALTERNATE ORDER OF CODES

And if a time of use tariff was available, how likely would your household be to switch to it? <IF SM7 <> 1/3 Your household would need to have a smart meter installed and> to gain any benefits from the tariff you would need to make sure you reduce the amount of energy your household uses at peak times.

1. Definitely would
 2. Probably would
 3. Might or might not
 4. Probably would not
 5. Definitely would not
- 98: Prefer not to say [FIX AT END]
99: Don't know [FIX AT END]

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

Now thinking about the appliances you have in your home and how your household uses them.

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

APPLIANCE

MULTIPLE CODE

DO NOT ROTATE

Which, if any, of these appliances do you have in your household?

1. Washing machine
2. Tumble dryer
3. Combined washer/dryer
4. Dishwasher
5. Fully electric vehicle
6. Energy storage (e.g. large batteries kept in garage)
7. Smart heating controls to enable you to programme your boiler online / by smart phone (e.g. NEST, HIVE)
8. Smart TRVs (thermostats for individual radiators that you can control through smart heating controls or online/by smart phone)
9. Smart bulbs, smart lights, smart plugs
96. None of these [EXCLUSIVE]
- 98: Prefer not to say [EXCLUSIVE]
- 99: Don't know [EXCLUSIVE]

Base: F149: APPLIANCE = Codes 1-5 (Use any relevant appliances)

WHENAPP
MULTIPLE CODE
DO NOT ROTATE

Now thinking about the hours of **4pm-8pm on weekdays**, which of these appliances do you tend to use at these times?

If the time varies, please say when they are done most often, and how you are using appliances nowadays.

Please select all that apply

SHOW ONLY ITEMS CODED AT APPLIANCE
ROWS

1. Use <your washing machine (IF CODE 1 AT APPLIANCE) /the wash cycle on your washer/dryer (IF CODE 3 AT APPLIANCE) >
2. Use <your tumble dryer (IF CODE 2 AT APPLIANCE) / the dry cycle on your washer/dryer (IF CODE 3 AT APPLIANCE) >
3. Use your dishwasher (IF CODE 4 AT APPLIANCE)
4. Charge your electric vehicle (IF CODE 5 AT APPLIANCE OR 2 OR 3 AT BCHECK)
5. Varies too much to say [EXCLUSIVE]
97. None of these [EXCLUSIVE]
98. Prefer not to say [EXCLUSIVE]
99. Don't know [EXCLUSIVE]

Base: F150: WHENAPP = Codes 1-4 (Uses any relevant appliance at peak times)

LOADSH
SINGLE CODE PER APPLIANCE

SHOW AS GRID

How easy or difficult would it be for your household to change when you do these things to different times of the day (outside of 4pm - 8pm). Again, please think about how you could use appliances nowadays.

ROWS

1. Use <your washing machine (IF CODE 1 AT APPLIANCE) /the wash cycle on your washer/dryer (IF CODE 3 AT APPLIANCE) >
2. Use <your tumble dryer (IF CODE 2 AT APPLIANCE) / the dry cycle on your washer/dryer (IF CODE 3 AT APPLIANCE)
3. Use your dishwasher (IF CODE 4 AT APPLIANCE)
4. Charge your electric vehicle (IF CODE 5 AT APPLIANCE OR 2 OR 3 AT BCHECK)

COLUMNS

1. Very easy
 2. Quite easy
 3. Neither easy nor difficult
 4. Quite difficult
 5. Very difficult
- 98: Prefer not to say
99. Don't know

Base: F151: LOADSH = Codes 4 or 5 for any item (Difficult to load shift)

WHATPRE

MULTICODE

ROTATE CODES

Can you describe in a bit more detail what prevents your household from being able to do this (IF CODE 4 OR 5 FOR ONLY ONE ITEM AT LOADSH) / these things (IF CODE 4 OR 5 FOR MORE THAN ONE ITEM AT LOADSH) at a different time of day (outside of 4-8pm)?

1. Not at home at those times (e.g. at work, study)
2. Do not want noise through the day or night (e.g. would wake shift workers, annoy neighbours)
3. Does not fit with childcare/caring responsibilities (e.g. would wake the baby)
4. It's hard to plan when I need to use these appliances
5. Prefer to do them as I do at present
6. Safety concerns / not safe to leave appliance on unsupervised / at night
7. Other (specify)

98: Prefer not to say [EXCLUSIVE AND FIX AT END]

99: Don't know [EXCLUSIVE AND FIX AT END]

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

In the next few years, new types of smart technology could become available. This would help people reduce their energy bills by changing when households use energy to times when it's cheaper.

IF PARTICIPANT IS ELIGIBLE TO ANSWER MORE THAN ONE OF NEXT THREE QUESTIONS, ROTATE ORDER OF PRESENTATION OF INTCONT1APP, INTCONT1HC, INTCONT1EV

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

[INTCONT1APP](#)

[SINGLE CODE](#)

[ALTERNATE ORDER OF CODES](#)

Smart appliances, for example a washing machine, could be linked to an external company, such as your energy supplier. The external company would monitor when the cost of energy falls, and with your agreement would remotely control when your appliance runs.

To use the appliance you would load it and set it as ready, and the external company would start the appliance when the cost of energy falls.

You could still use the appliance in the same way as usual, by loading it up and turning it on to run; or you could use a timer or app yourself to programme when it would run.

How likely would you be to use appliances like this to reduce the cost of your household's energy bills?

1. Definitely would
 2. Probably would
 3. Might or might not
 4. Probably would not
 5. Definitely would not
- 98: Prefer not to say [\[FIX AT END\]](#)
- 99: Don't know [\[FIX AT END\]](#)

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

[INTCONT1HC](#)

[SINGLE CODE](#)

[ALTERNATE ORDER OF CODES](#)

Smart controls for home heating could be linked to an external company, such as your energy supplier. The external company would monitor when the cost of energy falls, and with your agreement would remotely control your home heating.

You would set your home's heating timer and thermostat to the temperature you prefer. The external company may reduce the temperature on your thermostat by one or two degrees for a short period of time at peak times to manage demand on the energy network at busy times. The difference should be very small and should not be noticeable, and in return your household would receive a small financial reward in the form of a cheaper energy tariff or a credit on your energy bill.

You could still over-ride this by turning the thermostat back up.

How likely would you be to use a home heating system like this to reduce the cost of your household's energy bills?

1. Definitely would
 2. Probably would
 3. Might or might not
 4. Probably would not
 5. Definitely would not
98. Prefer not to say [FIX AT END]
99. Don't know [FIX AT END]

Base: F175: BCHECK = Codes 2-3 (Have plug in EV)

INTCONT1EV

SINGLE CODE

ALTERNATE ORDER OF CODES

Smart controls for charging plug-in electric vehicles at home could be linked to an external company, such as your energy supplier. The external company would monitor when the cost of energy falls, and with your agreement would remotely control how quickly and when your vehicle charges.

You would plug in your vehicle to charge in the usual way. The external company may slow down the amount of power being used to charge the vehicle, or stop it altogether for a certain time period to help them to manage demand on the energy network at busy times.

The vehicle would still be ready for you to use when you need it because you would have told the supplier how much battery charge you need and when you need it.

In return your household would receive a small financial reward in the form of a cheaper energy tariff or a credit on your energy bill.

How likely would you be to use a system like this to charge your electric vehicle in order to reduce the cost of your household's energy bills?

1. Definitely would
 2. Probably would
 3. Might or might not
 4. Probably would not
 5. Definitely would not
98. Prefer not to say [FIX AT END]
99. Don't know [FIX AT END]

Base: F149: APPLIANCE = Codes 1-5 (Have used any relevant appliances)

INTCOMF
SINGLE CODE
ALTERNATE ORDER OF CODES

How comfortable or uncomfortable would you feel about an external company controlling when your <SUBSTITUTE DEPENDING ON WHICH QUESTIONS ASKED ABOVE appliances or heating run or when plug-in electric vehicles charge>?

1. Very comfortable
 2. Fairly comfortable
 3. Neither comfortable nor uncomfortable
 4. Fairly uncomfortable
 5. Very uncomfortable
98. Prefer not to say [FIX AT END]
99. Don't know [FIX AT END]

Base: F152: INTCOMF = 4/5

WHYCOMF
MULTICODE
DO NOT ROTATE

Why do you say you would feel uncomfortable about using the service we've just discussed? (This is a service where you would allow an external company to control when household <SUBSTITUTE DEPENDING ON WHICH QUESTIONS ASKED ABOVE appliances or heating run or when plug-in electric vehicles charge>)

1. Concerns around data sharing
2. Wouldn't trust external company with this information
3. Concerns around cost of appliances
4. Concern that the company may not switch the appliance on/things wouldn't be done

5. Concerns about when they would switch it on/like to run appliances when I'm at home (e.g. risk of fire, flooding, noise)
6. Concerns around internet access / using it / I do not have internet access
7. Other reason (please specify)
98. Prefer not to say [EXCLUSIVE]
99. Don't know [EXCLUSIVE]

Heating

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

QHEAT1

MULTI CODE

ROTATE CODES

Which of the following types of household heating systems had you heard of before today?

1. Electric storage heaters (usually attached to walls)
2. District heating networks or communal heating networks
3. Air source heat pumps
4. Ground source heat pumps
5. Hydrogen powered central heating (using a hydrogen powered boiler to heat radiators or warm air system)
6. Smart heating controls (Nest/Hive etc)
97. None of these [EXCLUSIVE AND FIX AT END]
98. Prefer not to say [EXCLUSIVE AND FIX AT END]
99. Don't know [EXCLUSIVE AND FIX AT END]

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

QHEAT2

SINGLE CODE

DO NOT ROTATE

And which is the main heating system that your household uses to heat the majority of your home in the winter? Is it...

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 heating
7. Communal heating

8. Air source heat pump
9. Ground source heat pump
10. Micro-Combined Heat and Power system
11. Hydrogen powered central heating (hydrogen boiler to heat radiators or warm air system)
12. Other (please state (including type of fuel))
13. No heating system
98. Prefer not to say
99. Don't know

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

CHANGES1

SHOW AS GRID

SINGLE CODE PER ROW

DO NOT ROTATE COLUMNS

Thinking realistically, how likely are you or your household to do these things?

ROWS

1. **IF TENURE = CODES 1-6 AND QHEAT2 DOES NOT = CODES 6-11 (IF OWNER OCCUPIER AND DOESN'T HAVE EFFICIENT HEATING)** Install a heating system to your property that produces fewer carbon emissions (e.g. a heat pump or hydrogen boiler)
2. **IF TENURE = CODES 1-6 (OWNER/OCCUPIER)** Upgrade or improve how energy efficient your property is (e.g. installing insulation, draught proofing, new windows)
3. **IF TENURE = CODES 1-6 (OWNER/OCCUPIER)** Install solar panels, turbines, combined heat and power system, or some other way of generating electricity for your household

COLUMNS

1. I/we have already done this
2. Definitely will
3. Probably will
4. Might or might not
5. Probably will not
6. Definitely will not
7. Not enough information to say
97. Not applicable
98. Prefer not to say
99. Don't know

Base: F167: CHANGES1 = Codes 5 or 6

CHANGES2

ASK FOR EACH ITEM SELECTED AT CHANGES. IF MORE THAN ONE ITEM SELECTED AT
CHANGES1, ROTATE ORDER HERE
MULTICODE PER ITEM

Is there anything in particular that stops you and your household from <MAKING CHANGES AT CHANGES>?

<IF CHANGES1 ROW 1 OR 3 (HEATING)
= CODES 5/6>

FOR HEATING

1. Cost of improvements is too high
2. No guarantee that it will save me money
3. Don't know what to do / where to get information
4. Don't trust installers/suppliers to give me unbiased information
5. Confused/received conflicting information
6. Hassle/disruption of making improvements
7. Structural considerations (e.g. lease restrictions, planning permission needed, period features in home, live in conservation area)
8. Concerns about safety
9. Concerns about new technologies / not proven to work
10. May make it more difficult to sell home in the future
11. No interest in energy efficiency/green issues
12. Lack of time
13. Other priorities at the moment (e.g. work, new baby)
14. Already doing enough
15. I'm renting/freeholder/owner will not allow
16. Won't stay here long enough
17. Other (please specify)
97. None of these [EXCLUSIVE AND FIX AT END]
98. Prefer not to say [EXCLUSIVE AND FIX AT END]
99. Don't know [EXCLUSIVE AND FIX AT END]

<IF CHANGES1 ROW 2 (INSULATION) =
CODES 5/6>

FOR INSULATION

1. Cost of improvements is too high
2. No guarantee that it will save me money
3. Don't know what to do / where to get information
4. Don't trust installers/suppliers to give me unbiased information
5. Confused/received conflicting information
6. Hassle/disruption of making improvements
7. May change character/appearance of my home
8. May lose space (e.g. room space, storage space in loft)
9. Structural considerations (e.g. shared walls, lease restrictions, planning permission needed, period features in home, live in conservation area)
10. No interest in energy efficiency/green issues
11. Lack of time
12. Other priorities at the moment (e.g. work, new baby)
13. Already doing enough
14. I'm renting/freeholder/owner will not allow
15. Won't stay here long enough
16. Other (please specify)
97. None of these [EXCLUSIVE AND FIX AT END]
98. Prefer not to say [EXCLUSIVE AND FIX AT END]
99. Don't know [EXCLUSIVE AND FIX AT END]

EVS

Base: F169: all non electric vehicle owners (BCHECK <> CODES 2/3)

QEV2

SINGLE CODE

ALTERNATE ORDER OF CODES

How likely would you be to change your household's car or van to an electric or plug-in hybrid one in the next five years?

- 1: Very likely
- 2: Quite likely
- 3: Neither likely or unlikely
- 4: Quite unlikely
- 5: Very unlikely
- 98: Prefer not to say [FIX AT END]
- 99: Don't know [FIX AT END]

Base: F170: all unlikely to buy an electric vehicle (EV2 = 4/5)

QEV3

MULTI CODE

ROTATE CODES

Why do you say your household is unlikely to change to an electric or plug-in hybrid car or van in the next five years?

Please select all that apply

1. The purchase price is too high
 2. The range on a full charge is too short
 3. It takes too long to recharge
 4. I don't have anywhere to recharge near my home
 5. There's not enough choice of models
 6. I don't know if the technology is reliable
 7. I don't know how much it will cost to run
 8. I don't know how much it will cost to maintain it
 9. I don't know enough about them
 10. Other (please specify)
98. Prefer not to say [EXCLUSIVE AND FIX AT END]
99. Don't know [EXCLUSIVE AND FIX AT END]

Demographics

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

INTRO10

NOW SOME QUESTIONS ABOUT YOU AND YOUR HOUSEHOLD, SO WE CAN LOOK AT YOUR ANSWERS ALONGSIDE THOSE OF other people like you.

Please note: some of the following questions may be considered personal. We would like to remind you that your participation is strictly voluntary and that your responses are used for research purposes only. The answers that you provide will be presented in aggregate form and none of them will be linked back to you in any way. All data will be collected and processed in adherence to the Market Research Society's Code of Conduct and the General Data Protection Regulation (GDPR).

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

Q128

SINGLE CODE

DO NOT ROTATE

How often do you use the internet?

- 1: Roughly every day
- 2: At least once a week
- 3: At least once a month
- 4: Less than once per month
- 5: Never - but I do have access
- 6: Never - and I do not have access

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

UK02ETH.

SINGLE CODE

Some questions can be sensitive in nature. We would like to remind you that your participation is strictly voluntary and that your responses are used for research purposes only. A "Prefer not to answer" option is available for you to select, if the case.

What is your ethnic group?

Select only one

- White [Expandable Header]
 - _1 English / Welsh / Scottish / Northern Irish / British
 - _2 Irish
 - _3 Gypsy or Irish Traveller
 - _4 Any other White background
- Mixed / multiple ethnic groups [Expandable Header]
 - _5 White and Black Caribbean
 - _6 White and Black African
 - _7 White and Asian
 - _8 Any other Mixed / multiple ethnic background
- Asian / Asian British [Expandable Header]
 - _9 Indian
 - _10 Pakistani
 - _11 Bangladeshi
 - _12 Chinese
 - _13 Any other Asian background
- Black / African / Caribbean / Black British [Expandable Header]
 - _14 African
 - _15 Caribbean
 - _16 Any other Black / African / Caribbean background
- Other ethnic group [Expandable Header]
 - _17 Arab
 - _18 Any other ethnic group, please write in _____
 - _19 Prefer not to answer

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

UK02EDU.

SINGLE CODE

What is your highest level of education attained?

Select only one

- _1 Primary school
- _2 Secondary school (age under 15 years old)
- _3 GNVQ / GSVQ / GCSE/ SCE standard.
- _4 NVQ1, NVQ2
- _5 NVQ3/ SCE Higher Grade/ Advanced GNVQ/ GCE A/AS or similar.
- _6 NVQ4 / HNC / HND / Bachelor's degree or similar.
- _7 NVQ5 or post-graduate diploma (e.g. Masters, PhD).
- 96: None
- 98: Prefer not to say
- 99: Don't know

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

Q131

SINGLE CODE

Do you or your husband / wife / partner 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.

- 1: Yes
- 2: No
- 98: Prefer not to say
- 99: Don't know

Base: F110: Q131 = Code 1 (Respondent or spouse/partner with long term limiting illness/disability)

DISA2

MULTIPLE CODE

DO NOT ROTATE

Which of these best describes the impairment, illness or disability?
PLEASE SELECT ALL THAT APPLY

- 1. Visual impairment
- 2. Other difficulties reading, speaking or understanding English
- 3. Hearing impairment

4. Mobility impairment
5. Mental health problems
6. Learning difficulties
7. Other health problem or disability
96. None of these [EXCLUSIVE AND FIX AT END]
98. Prefer not to say [EXCLUSIVE AND FIX AT END]
99. Don't know [EXCLUSIVE AND FIX AT END]

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

Q132 SINGLE CODE

And do you or your husband / wife / partner have any caring responsibilities for a member of your immediate family, or, a close relative outside of your household who has any long-standing illness, physical or mental health problem or disability? This includes caring for relatives with problems due to old age.

- 1: Yes
- 2: No
- 98: Prefer not to say
- 99: Don't know

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

Q133I MULTI CODE DO NOT ROTATE

Do you receive any of these?

Please include those you receive personally or jointly with your partner/spouse.

PLEASE SELECT ALL THAT APPLY

1. Child Benefit
2. Any Tax Credit (e.g. Child Tax Credit, Working Tax Credit)
3. Any means tested benefit (e.g. Universal Credit, Housing/Council Tax Benefit, Income Support, Jobseeker's Allowance)
4. Warm Home Discount
5. Registered for the energy and water priority services register
6. Other benefits or schemes (please specify)
7. None of these
- 98: Prefer not to say [EXCLUSIVE]
- 99: Don't know [EXCLUSIVE]

Base: **F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)**

Q134

SINGLE CODE

Is your own / your own and your partner's total income, before tax and any other deductions more or less than £16,000 per year?

If you have a partner please tell us about your combined income.

- 1: Less than £16,000
- 2: £16,000 or more
- 98: Prefer not to say
- 99: Don't know

Base: **F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)**

WELBI

SINGLE CODE

ALTERNATE ORDER OF ANSWER LIST

Which one of the following statements best describes how well you are keeping up with all of your bills and credit commitments at the moment?

Please include those you have personally or jointly with a partner or spouse.

PLEASE SELECT ONE ONLY

- 1. I am / we are keeping up with all bills and commitments without any difficulties
- 2. I am / we are keeping up with all bills and commitments, but it is a struggle from time to time
- 3. I am / we are keeping up with all bills and commitments, but it is a constant struggle
- 4. I am / we are falling behind with some bills or credit commitments
- 5. I am / we are having real financial problems and have fallen behind with many bills or credit commitments
- 6. I / we don't have any bills or credit commitments
- 98. Prefer not to say [EXCLUSIVE AND FIX AT END]
- 99. Don't know [EXCLUSIVE AND FIX AT END]

Base: **F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)**

COVID1

MULTICODE

DO NOT ROTATE

As a result of the COVID pandemic, have any of these happened to you or your household?:

1. Lost my job / partner lost their job
2. Been furloughed from my job / partner been furloughed from their job
3. Had to take a pay cut / partner had to take a pay cut
4. Have had another substantial loss of income (e.g. from self-employment or other activities)
97. None of these [EXCLUSIVE]
98. Prefer not to say [EXCLUSIVE]
99. Don't know [EXCLUSIVE]

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

ARREA
SINGLE CODE

In the last twelve months, has the household been in arrears on your gas or electricity bills?

That means that you have been unable to pay on time because of financial difficulties.

- 1 Yes, once
- 2 Yes, twice or more
- 3 Not at all
- 98: Prefer not to say
- 99: Don't know

Base: F140: Q5a/b = Code 3 (Has Prepayment meter)

QPPM1
SINGLE CODE
DO NOT ROTATE

How often, over the last year, would you say that you have been temporarily disconnected from your <Q1=1 gas/ Q1=2 electricity/Q1=3 gas or electricity> supply because the meter ran out of credit before you topped it up?

- 1: Once a week or more
- 2: Two-three times a month
- 3: 6-12 times in the last year
- 4: 3-5 times in the last year
- 5: 1-2 times in the last year
- 6: Never



Base: F141: QPPM1 = Codes 1-5 (Has been disconnected from any fuel type on PPM in the past 12 months)

QPPM2

SINGLE CODE

DO NOT ROTATE

And which is the longest period of time you have been disconnected from your <Q1=1 gas/ Q1=2 electricity/Q1=3 gas or electricity> supply in the last year?

1: Less than an hour

2: Up to three hours

3: Up to seven hours

4: Up to twelve hours

5: Up to twenty-four hours

6: More than one day (24 hours) (ENTER NUMBER OF DAYS INTO BOX)

98: Prefer not to say

99: Don't know

Base: F2: Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)

ADULTS1

MULTICODE

DO NOT ROTATE

We would like to look at your answers alongside those from other households like yours. Which, if any, of these groups of people live in your household?

1. Any children aged under 5
2. Any children aged 5-15
3. Any adults aged 65+
4. None of these [EXCLUSIVE]
5. Don't know [EXCLUSIVE]

Base: F2: Has gas and/or electricity supply and responsible for it

Q136

SINGLE CODE

Thank you for your help with this survey so far.



If you would like any more information about any of the topics we've discussed, please visit Ofgem at <https://www.ofgem.gov.uk/> or the Energy Saving Trust <https://energysavingtrust.org.uk/>

We may wish to get back in touch with some people in the next 12 months to take part in follow-up research as part of this research project. Which of these do you give us permission to do in the next year?

If you give your permission now, you can change your mind later. After 12 months, your contact details will be deleted and you will not be contacted again as a result of this survey for this client. Would you be willing to be recontacted again in the next 12 months?

1. Yes, willing to be re-contacted by Ipsos MORI as part of this research project
2. No, not willing to be re-contacted by Ipsos MORI as part of this research project

IF PERMISSION TO RECONTACT GIVEN, TAKE CONTACT DETAILS – NAME, ADDRESS, TEL NUMBER AND EMAIL ADDRESS

ADD_COLLECT_UK

Please make sure you enter correct and complete information.

first name:

Last name:

Street name:

House/Flat number or Name:

Post Town:

Postcode:

4.5 Questionnaire filters

Filter No.	Description	Definition
F0 All respondents	[All]	All respondents
F1	Q1 = Codes 1-3 (Has gas and/or electricity supply)	Has gas and/or electricity supply
F2	Q1 = Codes 1-3 AND Q2 = Codes 1 or 2 (Has gas and/or electricity supply and responsible for it)	Has gas and/or electricity supply and responsible for it
F108	F108 (COMPARE 2 = 1 AND ENGAGE2 <>1 OR 2) OR COMPARE2 = 2	Shopped around in energy market but not switched supplier or tariff in P12M, or not shopped around in energy market at all in P12M
F110	Q131=1	Respondent or spouse / partner has long term limiting illness/disability (Q131)
F129	[SM4=1]	Says they have a smart meter
F140	Q5a / Q5b = Code 3	Has PPM
F141	QPPM1 = Codes 1-5	Has PPM and has been disconnected from any fuel type in past year
F145	(Methods = 3 or 4)	Aware of scanning / auto switching
F147	(ENERGYOOB = codes 1-3)	Aware of energy companies going out of business at energyoob
F148	ENERGYOOB=1	Went through energy company failure themselves
F149	(APPLIANCE = 1-5)	Have used any relevant appliances
F150	(WHENAPP = 1/2/3/4)	Uses any of the four relevant appliance at peak times
F151	(LOADSH = 4 or 5)	Difficult to load shift

F152	(INTCOMF = 4/5)	Has opinion either way on external company controlling when appliances run
F155	SM7 = 2	does not have smart meter type A
F157	Compare1 = 1	Have ever compared deals
F158	ENGAGE 1 = Codes 1 OR 2 (Have ever engaged)	have ever engaged
F159	ENGAGE2 = 1	Switched supplier p12m
F160	COMPARE 2 = Code 1 OR ENGAGE 2 = Codes 1 OR 2	Compared suppliers or tariffs in the past 12 months OR switched gas or electricity supplier or tariff
F163	PEAK = Code 1	Aware of peak and off-peak periods
F165	PEAK = Code 1 AND PEAK3 <> code 1	Aware of peak and off-peak periods and not on a time of use tariff
F166	PEAK = Code 1 AND PEAK3 <> code 1 AND PEAK3A <> 1	Aware of peak and off-peak periods and not on a time of use tariff and not in the process of switching
F167	CHANGES = Codes 5 or 6	Not planning to make green changes to household
F169	(BCHECK <> CODES 2 or 3)	All non-electric vehicle owners
F170	EV2 = 4/5	All not likely to buy an electric vehicle
F171	EU01HINC = 1/2	Main / joint main income earner

F172	EU01HINC = 3	Not main income earner
F173	Q150=1	Gas and electricity from same supplier
F174	Q150=2/98/99	Gas and electricity from different suppliers
F175	BCHECK = Codes 2-3	Has plug in EV
F176	(QCOMPARE2 = 1) AND (QENGAGE2 <> 1/ 2) OR (QCOMPARE2 <> 1) AND (QENGAGE2 <> 1/ 2)	Has compared energy deals in past 12 months but has not switched tariff or supplier OR has not compared energy deals in past 12 months