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# Consumer Impacts of Market Conditions

Wave 5

Technical Report – Fieldwork January to February 2024

Prepared by BMG for Ofgem

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## Context and objectives

Ofgem launched the Household Consumer Impacts of Market Conditions Tracking Survey in 2022 to provide a stronger understanding of consumer experiences and attitudes during this difficult time. The survey covers issues such as the impact of rising energy bills on households, awareness of available support, and the impacts of market conditions on energy market engagement.

The purpose of the research is to:

- measure overall consumer awareness, perceptions and experiences relating to changes in the energy market
- analyse how different audiences have been affected by these changes
- track how awareness, perceptions and behaviours vary over time.

## Overview of approach

Fieldwork for this wave (wave 5) was conducted from 12 January to 1 February 2024. The previous waves were conducted:

- wave 4: 3 to 20 July 2023
- wave 3: 21 November to 11 December 2022
- wave 2: 4 to 31 July 2022
- wave 1: 18 to 31 March 2022

Fieldwork was undertaken using three approaches:

1. online surveys via online panels to capture the digitally enabled general population
2. online river sampling to capture those digitally enabled but less present on panels
3. face-to-face interviews to ensure the inclusion of the digitally excluded. Previous waves also included an element of telephone interviewing, which was discontinued in the latest wave (see page 9 for more detail).

Quotas were set to ensure a representative sample of the GB population for gender, age, region and SEG. While these were broadly achieved within the sample, any discrepancies are addressed through weighting, which uses the same proportions. All targets were taken from the 2011 census.

The latest wave comprised 3,439 interviews in total (maximum confidence interval of  $\pm 1.67\%$  at the 95% level of confidence). A breakdown of completions by mode is outlined below.

Method	Sample size (unweighted)
Online panel	2,947
River sampling	292
Face-to-face interviews with digitally excluded respondents	200
Total	3,439

## Questionnaire design

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

A final version of this questionnaire was then used by BMG to script the survey into a version optimised for online administration, and another for face-to-face interviewing, including additional screeners for digital exclusion in the face-to-face survey.

## Sampling approach

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

- aged 16 or above
- residents of Great Britain, verified by their postcode
- have mains gas or electricity in their home
- solely or jointly responsible for their household's energy bills

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

### Online panel quotas

Quotas and weights were set for age, gender, region, and SEG, these targets were matched from those used in previous waves. All sources are from the 2011 census (ONS).

Savanta has provided the online panel element of this project. This has remained consistent across all waves.

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

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

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

Age (2011 census)	Target (%)	Achieved across all components (%)
16-34	30%	21%

35-64	47%	49%
65+	23%	29%

Gender (2011 census)	Target (%)	Achieved across all components (%) <sup>1</sup>
Male	49%	47%
Female	51%	53%

Region (2011 census)	Target (%)	Achieved across all components (%)
North East	4%	5%
North West	11%	12%
Yorkshire and the Humber	9%	8%
East Midlands	8%	7%
West Midlands	9%	9%
East	10%	9%
London	14%	11%
South East	14%	14%
South West	9%	9%
Wales	5%	6%
Scotland	9%	9%

SEG (2011 census)	Target (%)	Achieved across all components (%) <sup>2</sup>
AB	22%	23%
C1	31%	28%

<sup>1</sup> A small number selected non-binary and prefer not to say.

<sup>2</sup> The achieved numbers are more skewed for age and SEG relative to the target, partly due to the tolerance around quotas but also because the face-to-face CASI approach targeted older areas with higher deprivation (two variables which correlate with digital exclusion). Both variables are used in the Low Connectivity Index to help identify respondents more likely to be digitally excluded.

C2	21%	17%
DE	26%	30%

## Face-to-face quotas

As outlined above, the face-to-face approach was included as a route to reach digitally excluded respondents. The approach uses Computer-Assisted Self-Interviewing (CASI). Here, the interviewer completes some of the initial screening questions with the respondent and then hands over the survey device to respondents to self-complete the rest of the questionnaire.<sup>3</sup> This is quicker to administer and mirrors the self-complete methodology for online interviews.

It uses screening criteria to ensure it reaches digitally excluded respondents. While this represented a change from the telephone approach used previously, all respondents went through the same digital exclusion screeners as in previous waves. To qualify, digitally excluded respondents had to fall into at least one of the following categories<sup>4</sup>:

1. no access to the internet.
2. access to the internet but not confident using it.
3. only use the internet for email, browsing, news or social media.

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<sup>3</sup> Exceptions were made where respondents were less comfortable using a tablet device or needed support for accessibility-related reasons. In these instances, the interviewer led the interview.

<sup>4</sup> This is broadly based on research from Ofcom - [Digital Exclusion Review](#) (see page 5-7) and [Adults' Media Use and Attitudes report 2022 \(ofcom.org.uk\)](#) (see page 9).

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

Age and gender	CIM waves 1-4	Target range (min-max)	Achieved in wave 5 via face-to-face fieldwork
18-34	7%	2% - 10%	6%
35-64	27%	15% - 30%	29%
65+	66%	60% - 85%	63%
Male	42%	40% - 55%	47%
Female	58%	40% - 55%	53%

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

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

Region	% of population	Sampling points selected	Target interviews	<u>Achieved interviews</u>
<b>South</b>				
South total	46%	4	80	80
<b>Midlands</b>				
Midlands total	17%	2	40	40
<b>North</b>				
North total	24%	2	40	38
<b>Devolved nations</b>				
Scotland	9%	1	20	22
Wales	5%	1	20	20

## Fieldwork process

### Fieldwork soft launch

The survey was launched online first, with the early survey completes extracted and reviewed to 'sense-check' the data on 11 January. These checks included ensuring that the number of valid responses was

being correctly recorded and checking the survey logic and routing were working as intended. Once everything was confirmed as working, the online component was full launched on 12 January, with the face-to-face CASI approach was launched on 14 January.

## Main fieldwork

Fieldwork was undertaken from 12 January to 1 February 2024.

A total of 3,439 interviews were completed. Each online interview took approximately 20 minutes to complete, and CASI interviews to on average 25 minutes to complete.

## Weighting

The sample was weighted using the above target percentages set out above in the sampling approach section for age, gender, region, and SEG. These weights will be applied in each wave to ensure each is comparable to the others.

Please note that this programme uses targets for the 16+ population of Great Britain, including data on age. In contrast, the Energy Satisfaction Survey - another survey commissioned by Ofgem as well as Citizens Advice - uses data on the household reference person, including their age. The household reference person is the member of the household in whose name the accommodation is owned or rented or is otherwise responsible for the accommodation. In households with a sole householder, that person is the household reference person. This difference in data collection means that the sample for the CIM report typically has a slightly younger profile.<sup>5</sup>

The effective sample size helps assess the impact of the weights on the unweighted sample. The effective sample size is a measure of the precision of the sampling approach and the efficiency of the weights. In essence, they help assess the strength and accuracy of the survey results by accounting for potential biases and uncertainties introduced by weighting factors. The overall effective sample size was 83%.

This is in the high range, suggesting the sample selection process is working well. Essentially, an effective sample size of 83% means that the weighted sample behaves as if it were 83% as large as the unweighted sample in terms of its capacity to produce accurate and unbiased estimates.

This figure is a useful measure because it indicates that the weighting adjustments, while necessary to ensure the sample accurately represents the broader population, have only modestly reduced the sample's statistical efficiency.

## Quality checks

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

The average survey time for those taking part in this survey was as follows:

- online interviews took on average 20 minutes to complete
- CASI interviews took on average 25 minutes to complete

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

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<sup>5</sup> The term "household reference person" refers to the individual in a household who is acknowledged as the head for statistical purposes. Household reference po



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

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

## Historic changes to the programme (waves 1-4)

### Overview of changes

BMG and Ofgem have worked together over the course of the CIM programme to ensure that the most up-to-date best practice approaches are taken, while ensure trackability of results with previous data. There are three main changes, which we outline below, alongside the rationale behind each change:

- 1. replacing telephone interviews with a face-to-face approach (adapted for wave 5):** Over the course of the first four waves, it became apparent that the programme is unsuited for telephone interviews as it leads to excessively long interviews. To improve engagement and respondent experience, the previous face-to-face and telephone mixed approach was replaced with an entirely face-to-face approach.

Face-to-face interviews targeted the same group as the telephone approach, with identical screening questions. Steps were also taken to ensure this component was sampled consistently in terms of the age and gender profile of digitally excluded respondents relative to the telephone approach undertaken in the previous wave.

This change had a minor impact on the small proportion of the sample (c.100 respondents) who were interviewed this way due to the change in the role of the interviewer. While an interview is still present for a CASI interview, and completes the initial screening questions for the respondent, respondents are then asked to fill out the main survey by themselves, with the interviewer only providing technical support where required. This is quicker to administer and mirrors the self-complete methodology for online interviews.

Given that only 3% of the sample is impacted by this change, the difference in the interviewer's role does not have a material impact on overall results, or on tracking between waves.

- 2. review of content after the initial year of the programme (conducted for wave 4):** The CIM programme was originally established in Spring 2022 to explore consumer experiences and attitudes in the wake of the energy crisis in summer 2021. After the first year of the programme, Ofgem and BMG undertook a full review of the topics covered and questions asked within the programme in response to the current situation in the energy market. This encompassed a workshop session with stakeholder groups from across Ofgem to identify topics that were no longer relevant, ones that continued to be priorities and new factors that had emerged over the year. BMG and Ofgem then used these outputs to redesign the questionnaire in a way that would maximise the value of the research to Ofgem and the wider energy sector.
- 3. cognitive interviewing (conducted for wave 4):** The quality of data collected in a survey is partially determined by respondents interpreting each question according to its intended meaning<sup>6</sup>. Cognitive interviewing is a widely used pre-testing tool in which respondents are asked to report directly on the internal cognitive processes employed to answer survey questions.

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<sup>6</sup> Examining the complex psychological processes involved in answering different types of survey questions  
[https://www.researchgate.net/publication/261815491\\_The\\_Psychology\\_of\\_Survey\\_Response\\_by\\_Roger\\_Tourangeau\\_Lance\\_J\\_Rips\\_Kenneth\\_Rasinski](https://www.researchgate.net/publication/261815491_The_Psychology_of_Survey_Response_by_Roger_Tourangeau_Lance_J_Rips_Kenneth_Rasinski)

Interviewers probe the meaning of specific terms or the intent of specific questions throughout the interview.

While cognitive interviewing was not undertaken for wave 5 of this research, it had been used to test questions prior to wave 4. These used an initial draft of the wave 4 survey to script an online version of the survey. This online version was then used to test participant experienced the survey as it would appear to a 'real' respondent, including the look and feel of the survey, the question layouts, and routing. A total of 10 sessions were conducted. Respondents were recruited to ensure representation of a mix of payment methods, age groups, urban/rural designation, and regional location within Great Britain.

Participants completed the cognitive interview online via video call using a screen share. Interviews were carefully recruited with a broad demographic and regional mix of participants.

The feedback from the interviews was analysed and reported back to Ofgem, including recommendations for final changes to the questionnaire. Given the similarities between the wave 4 and 5 surveys, Ofgem and BMG agreed that further cognitive testing was not required prior to wave 5 fieldwork.

## Statistical significance

Statistical significance is a measure used to determine the likelihood that the results observed in a survey are due to chance rather than a specific factor or intervention. It helps in assessing whether the patterns and differences found in the data are genuine and can be reliably used to infer conclusions about the broader population.

Given that the survey uses quotas rather than random probability sampling, statistical significance is indicative only, but still a useful measure to quantify confidence in statistical change.

Where significant differences between subgroups and the total sample are identified, 'total sample' represents the total sample minus the subgroup in question.

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

In the data tables, letters are employed to highlight significant differences when comparing one subgroup to others in the tables, or to compare subgroups against the total. These groups are identified by corresponding letters placed beneath the column headers in the cross-break section of the table. A letter underneath a percentage figure means the figure is significantly higher at 95% confidence interval than for the group denoted by the letter (see example image below). Colour-coding is used to highlight significant differences when comparing a subgroup to the total minus the subgroup in question. A red highlighted figure signifies that the subgroup is significantly lower than the total at 95% confidence interval, a green figure signifies that it is significantly higher.

<b>A11: How often do you usually pay?</b>				
<i>Base: All who do not have a prepayment</i>				
	Total (A)	Age_1		
		16-34 (G)	35-64 (H)	65+ (I)
Unweighted Total	2961	609	1401	941
Effective Sample Size for Statistic Base	2477	502	1309	816
Base: All respondents Answering	2944	848	1346	741
	100%	100%	100%	100%
Monthly	2547 87%	701 83%	1153 86%	686 93%
	7,T8,C9,G9			A,G,H
Quarterly (every 3 months)	344 12%	127 15%	169 13%	47 6%
	8,Y8,B9,F9	A,I	I	
Every 6 months	19 1%	12 1%	7 1%	- -
	8,B9,E9,H9	A		
Other (please specify)	17 1%	3 0%	8 1%	5 1%
	6,V8,X8,C9			
Don't know	16 1%	5 1%	9 1%	2 0%
	8,B9,C9,G9			

Statistical tests run on the data outputs are as follows:

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

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

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

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

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

## Data retention & GDPR

All staff at BMG have received the appropriate level of training to ensure they are fully familiar with the requirements of GDPR. New staff receive a two-hour training session on Information Security and GDPR as part of the induction process.

As a registered Data Handler (Registration No. Z5081943), we have a dedicated team of database analysts, headed up by an ISEB (Information Systems Examination Board) qualified Business Systems Director, and we have all of the necessary safeguards in place to ensure Data Protection procedures are adhered to. All survey data is electronic and is kept anonymised. It is destroyed in line with MRS and data protection guidelines – which requires all personally identifiable information to be destroyed a year after it was collected, all non-identifiable information which is not required for tracking purposes will be destroyed after 2 years.

BMG adheres to the following to provide quality and provide clients with assurance:

- ISO 20252:2019; MQA Ltd – 28.02.2011 to 28.02.2023; Scope: Provision of Market Research services; Certificate Number: 0515
- The International Standard for Information Security Management ISO 27001:2013;
- Interviewer Quality Control Scheme (IQCS) Member Company
- Registered under the Data Protection Act - Registration No. Z5081943
- Cyber Essentials Plus certification - ECSC Group PLC; Scope: BMG Research Limited UK Operations; Certificate no.: 4869492354715189.



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[www.bmgresearch.co.uk](http://www.bmgresearch.co.uk)

Registered in England No. 2841970

Registered office:

Spring Lodge

172 Chester Road

Helsby

Cheshire

WA6 0AR

UK

Tel: +44 (0) 121 3336006

UK VAT Registration No. 580 6606 32

Birmingham Chamber of Commerce Member No. B4626

Market Research Society Company Partner

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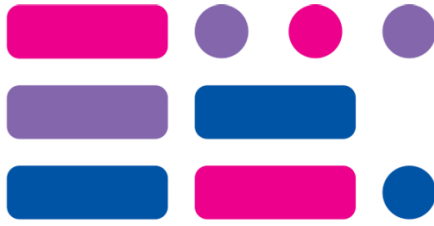
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