



Technical Annex: Non-Domestic Consumer Research 2024

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Introduction

This technical annex accompanies the main research report 'Businesses' Experiences of the Energy Market 2024'. The primary aim of the research was to build on the existing Ofgem evidence base around business experiences in the non-domestic energy market. Please see the main report for more information on the research background, aims and objectives.

Quantitative and qualitative respondents were referred to as 'businesses' within the main report. However, the sample is more specifically defined as 'non-domestic consumers', which are businesses that operate out of non-domestic premises and have a non-domestic energy contract. This excludes businesses that operate out of a home or domestic property. While public bodies and charities were not deliberately sampled, they were eligible to take part in the research as long as they operated from a non-domestic premises and had a non-domestic energy contract.

Ineligible businesses were those that: did not have a non-domestic energy contract or were not sure; businesses that could not provide information on their businesses' energy supply; and businesses that had neither gas nor electricity in their premises or were not sure or refused to answer this question.

Quantitative methodology

Sampling

IFF used a Probability Proportionate to Size (PPS) approach to sampling, as per the approach used in the equivalent 2023 study. This balanced the requirement to achieve a robust sample that was representative of the population with the need for sufficient numbers within each subgroup to enable reliable subgroup analysis. This was a two-stage approach.

At the sector level, half of the sample was drawn equally across the 9 macro-level SIC (Standard Industrial Classification) sectors,¹ with the remainder distributed in proportion to the population.

This process was then repeated within each sector, so that half the sample was distributed equally by size (0-9, 10-49, 50-249, 250+), and the other in proportion to the size distribution within that sector.²

Regional targets were set in line with the overall population distribution of UK businesses, using 2023 Business Population Estimates (2024 statistics were not available until October 2024).³ The following tables show the targets set for the achieved sample of interviews, by size, sector and region.

Using a sample-to-target ratio of 20:1 overall, IFF made a sample order of 19,763 businesses from Market Location (a provider of UK business records).⁴ This is very similar to the sample order made from Market location in 2023 at 19,508.

Table 1.1 Size by sector targets for the non-domestic consumer survey

	0	1-9	10-49	50-249	250+	Total
Agriculture /Mining /Energy (ABDE)	10	33	10	9	9	71
Manufacturing (C)	10	35	13	11	10	79
Construction (F)	18	64	18	17	17	134
Retail /Distribution. (G)	14	47	17	13	13	104
Transport and Storage (H)	12	41	12	11	11	87
Hotel/Catering (I)	9	32	15	10	10	76

¹ Sectors: agriculture /mining / utilities; manufacturing; construction; retail and distribution; transport and storage; hotel and catering; finance; property, management and business services; public administration/other.

² This annex references to sole traders and micro-sized businesses, small businesses, medium-sized businesses and large businesses which directly correlate to the listed employee number sizes (0-9, 10-49, 50-249,250+). These business size definitions are standard for both the DBT Business Population Estimates and Market Location sample.

³ Population information was based on the Department for Business and Trade's business population estimates for 2023.

⁴ IFF chose Market Location in this instance because their business database has the largest number of commercially available UK business records.

	0	1-9	10-49	50-249	250+	Total
Finance (K)	8	29	9	8	8	62
Property /Management /Business Services (JLM)	23	78	23	21	21	166
Public administration /Other (NPQRS)	28	104	32	29	28	221
Total	132	463	149	129	127	1,000

Table 1.2 Regional targets for the non-domestic consumer survey

	No. of interviews
North East	30
North West	100
Yorkshire and The Humber	70
East Midlands	70
West Midlands	85
East of England	105
London	190
South East	155
South West	95
Wales	40
Scotland	60
Total	1,000

Questionnaire design

The questionnaire was developed via an iterative drafting process between IFF and Ofgem. IFF led the process and worked collaboratively with Ofgem to refine the questionnaire for piloting. Initial timing checks were carried out to determine the length of the questionnaire, and required changes were made to achieve an optimal length. The questionnaire builds upon the 2023 non-domestic consumer survey. It was updated to align with current research objectives, incorporating new questions and removing ones which were no longer of interest.

The questionnaire explored the following areas:

- Business profile;
- Energy contract;

- Customer service and complaints;
- Experience of energy costs;
- Selecting suppliers; and
- Energy efficiency.

When referencing the 'main energy supplier', within the survey and the report, this is referring to the supplier used by non-domestic consumers who use the same supplier for gas and electricity. Where businesses had different gas and electricity suppliers these were either referred to separately or as their 'supplier' depending on the context of the writing.

To minimise respondent confusion, questionnaire prompts were supplemented with additional information where necessary to clarify terminology.

Non-domestic customers on 'dual fuel' contracts

Specifically relating to questions B4-B8 and B13-B17. For those on both a gas and electricity contract (i.e. dual fuel), a decision was made to randomly assign them to questions on either their gas or electricity supply, and they were routed through the survey accordingly. This was due to concerns that asking respondents about their gas and electricity separately would make the survey too long and potentially discourage participation.

Pilot

IFF conducted a small pilot of the survey between 24th and 26th July 2024. Overall, the pilot was successful, with 15 interviews conducted in total. Fieldwork continued as planned, as there were no fundamental issues with the survey. However, some minor adjustments were made to the survey, such as refining certain answer codes for improved clarity.

Fieldwork

Mainstage fieldwork began on 26th July 2024 and ran until 9th September 2024. Surveys were conducted by IFF's interviewing panel using Computer-Assisted Telephone Interviewing (CATI) with interviews lasting 22 minutes on average.

Prior to the start of the study, all interviewers were provided with an in-depth briefing and comprehensive briefing notes. Throughout the study, meetings were held between interviewers, supervisors, and researchers to exchange experiences and share insights on recruitment and interview delivery.

All businesses that completed the survey had a non-domestic energy contract and were either responsible for arranging energy suppliers or for paying energy bills. The target respondents were members of staff with responsibility for, or understanding of, energy usage in the organisation. Where businesses had multiple sites, we interviewed members of staff who had knowledge of energy usage across the entire organisation.

Identifying and persuading the appropriate staff member to participate in the research was sometimes challenging, as energy contract responsibilities often span multiple departments. The CATI approach mitigated this by enabling interviewers to explain the study to the initial contact and collaboratively identify the most suitable participant within the organisation.

Survey - profile of completed interviews

Table 1.3 and Table 1.4 show achieved sample by size, sector, and region.

Table 1.3 Achieved sample - size by sector

	0	1-9	10-49	50-249	250+	Total
Agriculture /Mining / Energy (ABDE)	25	28	18	9	6	86
Manufacturing (C)	10	56	17	28	11	122
Construction (F)	7	51	32	14	11	115
Retail / Distrib. (G)	9	64	23	16	7	119
Transport and Storage (H)	4	40	23	11	7	85
Hotel/Catering (I)	1	16	20	10	6	53
Finance (K)	3	39	6	5	1	54
Property /Management / Business Services (JLM)	8	97	46	13	7	171
Public administration / Other (NPQRS)	14	88	37	30	26	195
Total	81	479	222	136	82	1,000

Table 1.4 Achieved sample - regional

	No. of interviews
North East	35
North West	106
Yorkshire and The Humber	71
East Midlands	72
West Midlands	89
East of England	67
London	85
South East	192
South West	129
Scotland	104
Wales	50
Total	1,000

Table 1.5 details sample outcomes and response rates for the survey.

Table 1.5 Sample outcomes

Sample outcome	Number of contacts	% of total sample	% of completed contacts
Total issued sample	19,587		
Ineligible establishments	1,973	10%	-
Unavailable during fieldwork / out of quota / includes soft and hard appointments	13,037	67%	-
Unobtainable/invalid numbers	1,749	9%	-

Total completed contacts with eligible respondents	2,828		
Achieved interviews	1,000	5%	35%
Respondent refusal	1,699	9%	60%
Breakdown during interview	129	1%	5%

Data processing

Survey responses were processed using IBM SPSS. Descriptive statistics were presented in Excel tables, which showed aggregate responses for each question as well as by key subgroups. All data files received full variable checks by members of the research team.

Coding was conducted on an on-going basis to code frames. Data files are GDPR compliant and ensure that respondents are not identifiable, with verbatim text included but revised to remove identifying information.

The following quality checks were conducted:

- We monitored the pattern of responses to identify ‘rogue’ completes where respondents appear not to have given considered answers. For example, we would ‘flag up’ cases where respondents have given the same/similar answers to all questions or where the questionnaire has been completed very much faster than average (e.g. in 5 mins). No such instances were identified.
- The coding manager checked at least 5% of the work of each coder. The coding team were briefed face-to-face by the research team.
- The specification for data preparation was signed-off by the Research Director and Ofgem.
- The starting list of analysis cross-breaks was developed by the Research Director and agreed with Ofgem before programming.
- All datasets (tables and SPSS files) were programmed by our experienced data services team and then checked sequentially by multiple members of the research team, before being signed off by the Research Director.

Weighting

Weighting was applied to the survey data to account for the purposive approach taken to sampling, and to ensure that the data was representative of the population. Using the same approach taken in 2023, the weighting approach combined the latest Business Population Estimates and responses to the screening section of the survey. Because certain businesses were ineligible, data from the screener questions were used to estimate an adjusted population of eligible businesses.

Using data from the screening questions at the beginning of the survey, estimated non-domestic consumer population statistics were created, so that the data could be weighted to represent the population. This section discusses how the adjusted population figures were determined.

To be eligible for the survey, non-domestic consumers had to:

- Have a business (rather than domestic) mains gas or electricity contract; and
- Be responsible for arranging their business’s energy suppliers or for paying their business’s energy bills.

In preparing sample targets we estimated the population by starting with the Department of Business and Trade’s 2023 business population estimates statistics and making assumptions about eligibility based on responses to screener questions S3, S4, S5 and S6:

S3 Can I just check whether your business’s main premises has a non-domestic energy contract, rather than a domestic or residential one?

IF NECESSARY: main business premises could be the primary location where your business operates, where the most energy is used, or where the majority of employees are based.

DO NOT READ OUT. SINGLE CODE

Yes	1	
No	2	Thank and close
Don't know	3	Thank and close

S4 Before we begin, can I just check, are you, or somebody else in the business, responsible for arranging your business’s energy suppliers or for paying your business’s energy bills?

IF MENTIONED LANDLORD OR THIRD PARTY PAYS BILLS: Before we begin, can I just check, are you, or somebody else in the business, responsible for arranging your business’s energy suppliers?

DO NOT READ OUT. SINGLE CODE

Yes	1	
Yes – and we can provide some information about energy usage/energy contracts	8	
Yes – but we cannot provide any information about energy usage/energy contracts	7	Thank and close
No	2	Thank and close
Don't have an energy contract	4	Thank and close
Don't know	5	Thank and close
Refused	6	Thank and close

S5 And can I check whether you are part of the head office of your business, or have knowledge of energy usage across the entire GB business?

DO NOT READ OUT. SINGLE CODE.

Yes	1	
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No [ASK TO BE TRANSFERRED]	2	IF TRANSFERRED, RETURN TO S2. IF NOT, THANK & CLOSE
Don't know	3	

S6 Do you have mains gas and/ or mains electricity in your main business premises?

IF NECESSARY: That is, gas or electricity derived from the public grid system

IF NECESSARY: Main business premises could be the primary location where your business operates, where the most energy is used, or where the majority of employees are based.

READ OUT. SINGLE CODE.

Mains gas and electricity	3	
Mains electricity only	2	
Mains gas only	1	
Neither	4	Thank and close
DO NOT READ OUT: Don't know	5	Thank and close
DO NOT READ OUT: Refused	6	Thank and close

Eligible population by sector and size

The tables below show the makeup of the adjusted population by sector and size (Table 1.6) and by region (Table 1.7). These proportions are based on all respondents who reached the above screener questions (S3, S4, S5 and S6), and those who stated in the introduction that they felt the survey was not relevant to them because they had a domestic contract. These proportions were applied to the survey data so that the survey data was in line with the adjusted population of eligible businesses in Great Britain.

Table 1.6 Proportion of eligible non-domestic consumers, by sector and size

	0-9	10-49	50-249	250+
Agriculture /Mining / Energy (ABDE)	64.4%	92.0%	80.0%	88.9%
Manufacturing (C)	54.8%	70.8%	83.3%	100.0%
Construction (F)	29.9%	68.4%	82.9%	72.7%
Retail / Distrib. (G)	63.1%	77.3%	91.3%	83.3%
Transport and Storage (H)	33.5%	78.6%	82.4%	90.0%
Hotel/Catering (I)	68.0%	94.4%	84.6%	83.3%
Finance (K)	43.5%	40.0%	31.3%	100.0%
Property /Management / Business Services (JLM)	36.3%	71.7%	67.7%	66.7%
Public administration / Other (NPQRS)	49.2%	63.5%	64.9%	90.0%

Table 1.7 Proportion of eligible non-domestic consumers, by region

Region	% eligible
North East	50.8%
North West	54.0%
Yorkshire and The Humber	57.5%
East Midlands	49.1%
West Midlands	52.6%
East of England	47.8%
London	43.5%
South East	45.9%
South West	52.5%
Scotland	64.2%
Wales	53.6%

Quantitative reporting

Throughout the main report of findings, all reported differences between subgroups of businesses in the survey (e.g. by business size or sector) are statistically significant (using a confidence interval of 95%), unless otherwise stated. Where there is a significant difference between a subgroup figure and the average of all other figures, this is signified with an asterisk (*) in a chart or a table.

When reading the accompanying excel data tables, a significant difference between a particular subgroup figure and the average of the other subgroups is flagged on the table with an asterisk * next to that subgroup percentage. In the row below the percentage figure, letters are used to denote that the percentage for that subgroup is significantly different to the other subgroup(s), indicated by the letter corresponding to the column labels.

Where data is based on fewer than 50 interviews, we are less confident that the finding applies to the wider population of GB businesses. Such findings should therefore be interpreted with caution.

Each table identifies the subset of respondents whose data was used to answer a particular question. This subset is determined by the survey's routing.

Where appropriate, the results from this research have been significance tested⁵ against the non-domestic research that was conducted for Ofgem and DESNZ in 2023, which was conducted using a similar methodology, but earlier in the calendar year (Survey: 3rd July to 28th July 2023, Qualitative interviews 29th September to 23rd October 2023).⁶

For some survey questions, the data shows high levels of 'don't know' reported by businesses. This could be due to several factors including the respondent lacking knowledge or responsible for the mentioned area or experiencing difficulty comprehending a question.

⁵ Statistical significance was calculated with a 95% confidence interval.

⁶ This report can be found here: <https://www.ofgem.gov.uk/publications/non-domestic-2023-research-report>. Survey fieldwork for this report was conducted between 3rd July to 28th July 2023.

Qualitative interviews methodology

Qualitative research was undertaken to further explore businesses' views and experiences of the energy market. This comprised 30 in-depth interviews with businesses that had previously expressed interest in follow-up contact during the survey. Each interview lasted approximately 45 minutes.

Topic guide design

The topic guide was developed through a collaborative process between IFF and Ofgem, with IFF leading the drafting. Initial timing checks were conducted to determine the appropriate length (approximately 45 minutes), and adjustments were made accordingly to the routing of the guide. To help keep interviews to time, interviewers were advised to route to priority sections first and not probe on the Net Zero / decarbonisation section if they were short of time.

To align with the specific policy interests of the 2024 research, a new topic guide was developed. This guide differed significantly from the one used in the 2023 Non-Domestic Consumers Survey for Ofgem. The emphasis was on going into more depth on key themes from the survey, rather than covering all survey themes in less detail.

The interviews focused on the following areas:

- Organisation needs and priorities;
- Affordability;
- Understanding of bills;
- Complaints;
- Experience of using brokers and;
- Net Zero/ decarbonisation.

Qualitative achieved sample

Of the 1,000 respondents who completed the survey, 423 agreed to be recontacted, representing 42% of all completed interviews. Qualitative fieldwork ran from 23rd October until 20th November 2024. The achieved sample for qualitative interviews, split by quotas, can be found in Table 1.8 in Appendix A.

Table 1.8 details achieved sample of the qualitative research, against original targets.

Qualitative analysis

Table 1.8 Qualitative interview achieved sample

Quota group	Target interviews (Minimum quotas)	Completed interviews
All interviews	30	
Size		
0-9 (Sole trader & Micro)	3	11
10-49 (Small)	3	3
50-249 (Medium)	3	10
250+ (Large)	3	6
Sector		
Agriculture / Mining / Energy	2	4
Manufacturing	2	4

Quota group	Target interviews (Minimum quotas)	Completed interviews
Construction	2	2
Retail / Distribution	2	5
Transport and Storage	2	3
Hotel / Catering	2	2
Finance	2	2
Property / Management / Business Services	2	3
Public Administration / Other	2	5
Struggle with bill in the last 12 months		
Struggle with bills last 12 months - Yes	6	12
Smart meter / AMR⁷ / neither		
Smart meter only	2	2
AMR only	2	3
Neither smart meter or AMR	2	2
Fair treatment from supplier		
Fair treatment	3	12
Unfair treatment	3	18
Dissatisfaction with energy supplier due to billing issues		
Dissatisfied with energy supplier due to billing issues – Yes	5	7
Complaint reason		
Billing	2	8
Overcharging	2	4
Poor communication	2	4
Poor customer service	2	5
Meter issues	2	1
Complaint status		
Unresolved	2	11
Sought external advice on energy related matters		
Sought external advice – Yes	2	8
Switched energy suppliers or contract in the last 12 months		
Switched energy suppliers or contract in the last 12 months – Yes	5	12
Used a broker when switching		
Used a broker when switching – Yes	6	18
Satisfied with broker	3	11
Dissatisfied with broker	3	3
Consulted a broker but didn't use their services		
Consulted a broker but didn't use their services – Yes	2	2
Used a broker for other services		
Used a broker for other services – Yes	2	5
Limited energy use (appliances)		
Limited energy use – Yes	2	15
Barriers to reduce carbon emissions		
Identified barriers to reducing business's carbon emissions	5	25
Energy literacy		

⁷ Automated Meter Reading (AMR) . An AMR meter only communicates from the customer to the energy supplier, whereas a smart meter has two-way communication between the energy supplier and the customer.

Quota group	Target interviews (Minimum quotas)	Completed interviews
Low energy literacy	4	4
Without a smart meter or AMR	2	2
With a smart meter or AMR	2	2
High energy literacy	4	26
Without a smart meter or AMR	2	10
With a smart meter or AMR	2	16

Appendix A: Questionnaire

Screener

ASK TELEPHONIST

S1 **Good morning / afternoon. My name is NAME and I'm calling from IFF Research on behalf of Ofgem, the independent regulator of energy in Great Britain.**

I need to speak to [HASCON=1: CONTACT NAME please; HASCON=2: the member of staff who is responsible for arranging and/or paying for your business's energy supply please?]

Transferred	1	CONTINUE
Hard appointment	2	MAKE APPOINTMENT
Soft Appointment	3	MAKE APPOINTMENT
Engaged	4	CALL BACK
Refusal	5	CLOSE
Refusal – company policy	6	CLOSE
Refusal – Recent participation in Non-Domestic Energy Affordability Scheme Evaluation	18	CLOSE
Refusal – Taken part in recent survey	7	CLOSE
Business now WFH only	16	CLOSE
Nobody at site able to answer questions	8	CLOSE
Not available in deadline	9	CLOSE
Fax Line	10	CLOSE
No reply / Answer phone	11	CLOSE
Residential Number	12	CLOSE
Dead line	13	CLOSE
Company closed	14	CLOSE
Domestic or residential tariff / contract	17	CLOSE

Request reassurance email	15	COLLECT EMAIL ADDRESS THEN CONTINUE OR MAKE APPOINTMENT (SEE APPENDIX FOR EMAIL)
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[IF SIZE>50 AND HASCON=2: This might be the Environment / Energy / Facilities / Operations Manager within your business.

IF CONTACT DOES NOT WORK THERE, ADD:

No problem, if I could speak to a member of staff who has an understanding of the energy supply within the business, please?

ADD IF NECESSARY: This might be the Environment / Energy / Facilities / Operations Manager within your business.

ADD IF NECESSARY: This is in no way an energy sales call.

ADD IF NECESSARY: We're contacting on behalf of Ofgem, the independent regulator of energy in Great Britain, who want to explore companies' experiences of the energy market and are keen to hear about your business's views.

ADD IF MENTIONS THAT BILLS ARE LOOKED AFTER BY LANDLORD OR A THIRD PARTY: You may still be eligible to take part if you know a bit about your energy usage. It would be great if I could ask a few more questions to see if this applies to you?

ASK ALL

S2 Good morning/afternoon, my name is NAME and I'm calling on behalf of Ofgem.

I am calling today as we are working on behalf of Ofgem to explore and understand companies' experiences in the energy market.

ADD IF NECESSARY: This is in no way an energy sales call.

Your views are important and will help Ofgem develop policies that can support businesses respond to their energy needs. It would be great if I could run through some questions quickly with you now, please?

ADD IF NECESSARY: Ofgem is the independent regulator for energy in Great Britain. Its role is to protect consumers, like yourselves, by regulating suppliers and the security and sustainability of the energy supply. This is not a sales exercise in any way.

ADD IF NECESSARY (unless the respondent has already asked how long the call will take): The call today will take around 15-20 minutes depending on the answers given.

ADD IF MENTIONS THAT BILLS ARE LOOKED AFTER BY LANDLORD OR A THIRD PARTY: You may still be eligible to take part if you know a bit about your energy usage. It would be great if I could ask a few more questions to see if this applies to you?

Continue	1	CONTINUE
Referred to someone else at establishment NAME _____ JOB TITLE _____	2	TRANSFER AND RE-INTRODUCE
Hard appointment	3	MAKE APPOINTMENT
Soft appointment	4	MAKE APPOINTMENT
Refusal	5	THANK AND CLOSE
Refusal – company policy	6	THANK AND CLOSE
Refusal – Recent participation in Non-Domestic Energy Affordability Scheme Evaluation	11	THANK AND CLOSE
Refusal – taken part in recent survey	7	THANK AND CLOSE
Not available in deadline	8	THANK AND CLOSE
Domestic or residential tariff / contract	10	THANK AND CLOSE
Request reassurance email	9	COLLECT EMAIL ADDRESS THEN CONTINUE OR MAKE APPOINTMENT (SEE APPENDIX FOR EMAIL TEXT)

ASK ALL AGREEING TO TAKE PART (S2 = 1)

GDPR: That’s excellent - thank you. Before we proceed any further, I’m required to tell you that, under data protection law, you have the right to have a copy of your data, change your data, or withdraw from the research at any point. If you’d like to do this, or find out more, you can consult our website at iffresearch.com/gdpr.

As part of our quality control procedures, all interviews are recorded automatically. Is that OK?

Yes	1	CONTINUE
No (Refusal)	2	THANK AND CLOSE

- REASSURANCES TO USE IF NECESSARY
 - Participation is completely voluntary. You are under no obligation to take part.
 - IFF Research will not disclose to Ofgem who has taken part in the research and your responses will be **completely anonymous** and used for research purposes only. All names and contact details are deleted at the earliest opportunity – and no more than 12 months after the end of the project. More information about this can be found on our website – www.iffresearch.com
 - You have the right to have a copy of your data, change your data, or withdraw from the research at any point. If you'd like to do this, you can consult our website at www.iffresearch.com/gdpr
 - IFF Research is a member of the Market Research Society, and as such has to comply with its Code of Practice, which is available to view on the MRS website (www.mrs.org.uk)
 - If you wish to confirm the validity of this study or get more information about aims and objectives, you can contact:
 - MRS: Market Research Society on 0800 975 9596**
 - IFF: Annie Avis at ofgemenergysurvey@iffresearch.com**
 - Ofgem: Dr Michael Kattirtzi at michael.kattirtzi@ofgem.gov.uk**

ASK ALL

S3 **Before beginning, can I just check whether your business’s main premises has a non-domestic energy contract, rather than a domestic or residential one?**

IF NECESSARY: main business premises could be the primary location where your business operates, where the most energy is used, or where the majority of employees are based.

DO NOT READ OUT. SINGLE CODE

Yes	1	
No	2	THANK AND CLOSE
Don't know	3	THANK AND CLOSE

ASK ALL

S4 **Before we begin, can I just check, are you, or somebody else in the business, responsible for arranging your business’s energy suppliers or for paying your business’s energy bills?**

IF MENTIONED LANDLORD OR THIRD PARTY PAYS BILLS: **Before we begin, can I just check, are you, or somebody else in the business, responsible for arranging your business’s energy suppliers?**

DO NOT READ OUT. SINGLE CODE

Yes	1	
Yes – and we can provide some information about energy usage/energy contracts	8	
Yes – but we cannot provide any information about energy usage/energy contracts	7	THANK & CLOSE
No	2	THANK & CLOSE
Don’t have an energy contract	4	THANK & CLOSE
Don’t know	5	THANK & CLOSE
Refused	6	THANK & CLOSE

ASK ALL

S5 **And can I check whether you are part of the head office of your business, or have knowledge of energy usage across the entire GB business?**

DO NOT READ OUT. SINGLE CODE.

Yes	1	
No [ASK TO BE TRANSFERRED]	2	IF TRANSFERRED, RETURN TO S2. IF NOT, THANK & CLOSE
Don’t know	3	

ASK ALL

S6 Do you have mains gas and/ or mains electricity in your main business’s premises?

IF NECESSARY: That is, gas or electricity derived from the public grid system

IF NECESSARY: Main business premises could be the primary location where your business operates, where the most energy is used, or where the majority of employees are based.

READ OUT. SINGLE CODE.

Mains gas and electricity	1	
Mains electricity only	2	
Mains gas only	3	
Neither	4	THANK & CLOSE
DO NOT READ OUT: Don't know	5	THANK & CLOSE
DO NOT READ OUT: Refused	6	THANK & CLOSE

S6Dum DUMMY VARIABLE, DO NOT ASK

Gas	1	S6=1/3
Electricity	2	S6=2/3

ASK ALL

S7 Do you use any of these heating methods in any of your business premises?

MULTI CODE. READ OUT

INTERVIEWER INSTRUCTION: Code all that apply.

Electric central heating	1	
Gas central heating	2	
A ground source or air source heat pump	3	
Oil central heating	4	
Combined Heat and Power	5	
Other (please specify)	6	
SINGLE CODE: No heating method used	7	
SINGLE CODE: Don't know	8	

ASK ALL

S8 **Are any of your business premises connected to a heat network?**

IF NECESSARY (DOES NOT UNDERSTAND THE TERM HEATING NETWORK): For example, heating is provided by communal heating, provided by a shared boiler, or another heat source. The boiler provides heat to all units **within that property**. Other properties are on district heating systems where heating is provided by a shared boiler or heat source that provides heating and hot water for **multiple properties**.

DO NOT READ OUT. SINGLE CODE

Yes	1	
No	2	
Don't know	3	

A Business Profile

ASK ALL

A1 **How many employees are there in your business in Great Britain?**

Please include both full-time and part-time employees on your payroll, and employees across all sites, but exclude working proprietors or owners, outside contractors, and agency staff

If you are a sole trader, you should answer 0 here

ENTER NUMBER

WRITE IN. MINIMUM 0.		
DO NOT READ OUT Don't know	1	
DO NOT READ OUT Refused	2	

IF DOESN'T KNOW, PROMPT WITH RANGES

Is it roughly...?

READ OUT. SINGLE CODE.

0 employees (Sole Trader)	1	
1-9 employees (Micro)	2	
10-49 employees (Small)	3	
50-249 employees (Medium)	4	
250+ employees (Large)	5	
DO NOT READ OUT: Don't know	6	
DO NOT READ OUT: Refused	7	

A0DUM **DUMMY VARIABLE, DO NOT ASK**

0 employees (Sole Trader)	1	A1=0 or A1DK=1
1-9 employees (Micro)	2	A1=1-9 or A1DK=2
10-49 employees (Small)	3	A1=10-49 or A1DK=3
50-249 employees (Medium)	4	A1=50-249 or A1DK=4
250+ employees (Large)	5	A1=250+ or A1DK=5

Unknown	6	A1=code 2 or A1DK=6/7
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ASK ALL

A2 Which region is your business based /headquartered in?

DO NOT READ OUT, PROMPT AS NECESSARY. SINGLE CODE.

North East	1	
North West	2	
Yorkshire and the Humber	3	
East Midlands	4	
West Midlands	5	
East of England	6	
London	7	
South East	8	
South West	9	
Scotland	10	
Wales	11	
Outside Great Britain	12	THANK AND CLOSE
Don't know	13	
Refused	14	

ASK ALL

A3 We have [SECTOR DESCRIPTION FROM SAMPLE] as a broad classification for your business. Does this sound about right?

DO NOT READ OUT. SINGLE CODE

Yes	1	
No	2	
Don't know	3	

ASK IF SIC CODE ON SAMPLE IS INCORRECT (A3=2/3) OR IF SIC CODE = MANUFACTURING, MINING/QUARRYING OR ARTS & HERITAGE (SAMPLE_SIC CODE = TBC)

A4 How would you describe the main activity of your business?

SUGGESTED PROBES:

What would you type into a search engine to find a business like yours online?

What is the main product or service of this business?

What exactly is made or done?

WRITE IN. PROBE AS NECESSARY.		
DO NOT READ OUT Don't know	1	
DO NOT READ OUT Refused	2	

ASK ALL

A5 Which of the following best describes your business's main premises?

READ OUT. SINGLE CODE.

Owned by business – sole use of building	1	
Owned by business – shared use of building	2	
Rented – sole use of building	3	
Rented – shared use of building	4	
Other, please specify	5	
Don't know	6	

B Energy contract

IF HAS GAS AND ELECTRICITY SUPPLY (S6DUM=1 AND 2)

B1 Do you use the same supplier for your gas and electricity supply?

READ OUT. SINGLE CODE.

Yes	1	
No	2	
DO NOT READ OUT Don't know	3	

IF USE SAME SUPPLIER FOR GAS AND ELECTRICITY (B1=1)

B2 Please could you tell me who your gas and electricity supplier is?

If you have more than one contract across different sites, please answer based on your main site, or the site with the highest energy use.

DO NOT READ OUT. SINGLE CODE.

Axpo	1	
BES Utilities	2	
British Gas	3	
Crown Energy	4	
EDF	5	
E.ON	6	
Engie	7	
Opus Energy	8	
OVO Energy	9	
Pozitive Energy	10	
Scottish Power	11	
SEFE (formerly Gazprom)	12	
SSE	13	
Shell Energy	14	

Total Energies Gas & Power	15	
Valda energy	16	
Other – Please specify	17	WRITE IN
Don't know	18	
Refused	19	

IF SUPPLIER KNOWN (B2=1-17)

B3 Why do you use [INSERT SUPPLIER FROM B2] as your main energy supplier?

DO NOT READ OUT. MULTI CODE.

INTERVIEWER INSTRUCTION: Code all that apply.

Cheapest option	1	
Best range of products / tariffs	2	
Good customer service	3	
The supplier offers green contracts / products	4	
Have always used them	5	
The supplier is the only one who would offer me a contract	6	
This was recommended to me by a third-party intermediary (TPI) or an energy broker	7	
Never had an issue with them	8	
Another reason – please specify	9	WRITE IN
DO NOT READ OUT Don't know	10	
DO NOT READ OUT Refused	11	

NOTE FOR DS: IF HAS GAS AND ELECTRICITY SUPPLY (S6DUM=1 AND 2) PLEASE RANDOMLY ASK GAS QUESTIONS TO HALF (B4-B8) AND ELECTRICITY QUESTIONS TO HALF (B13-B17)

IF DO NOT USE SAME SUPPLIER FOR GAS AND ELECTRICITY (B1=2/3) OR ONLY HAVE GAS SUPPLY (S6DUM=1 ONLY)

B4 Who is your business's main gas supplier?

If you have more than one contract across different sites, please answer based on your main site, or the site with the highest energy use

DO NOT READ OUT. SINGLE CODE.

Axpo	1	
BES Utilities	2	
British Gas	3	
Corona Energy	4	
Crown Energy	5	
EDF	6	
E.ON	7	
Engie	8	
SEFE (formerly Gazprom)	9	
Opus Energy	10	
Pozitive Energy	11	
Scottish Power	12	
SSE	13	
Total Energies Gas and Power	14	
Yü Energy	15	
Shell Energy	16	
OVO Energy	17	
Valda Energy	18	
Other – Please specify	19	WRITE IN
Don't know	20	
Refused	21	

IF GAS SUPPLIER KNOWN (B4=1-19)

B5 Why do you use [INSERT SUPPLIER FROM B4] as your main gas supplier?

DO NOT READ OUT. MULTI CODE.

INTERVIEWER INSTRUCTION: Code all that apply.

Cheapest option	1	
Best range of products / tariffs	2	
Good customer service	3	
The supplier offers green contracts / products	4	
Have always used them	5	
The supplier is the only one who would offer me a contract	6	
This was recommended to me by a third-party intermediary (TPI) or an energy broker	7	
Never had an issue with them	8	
Another reason – please specify	9	WRITE IN
DO NOT READ OUT Don't know	10	
DO NOT READ OUT Refused	11	

ASK IF HAS GAS MAINS (S6DUM=1)

B6 Do you have either of the following for gas?

READ OUT. SINGLE CODE.	YES	NO	Don't Know
_1 Smart Meter IF NECESSARY: Smart meters automatically send energy usage information over wireless networks to the supplier, and gives detailed usage information to the customer	1	2	3
_2 Automated Meter Reading (AMR) device IF NECESSARY: AMR devices provide monthly meter readings automatically	1	2	3

IF DO NOT USE SAME SUPPLIER FOR GAS AND ELECTRICITY (B1=2/3) OR ONLY HAVE ELECTRICITY SUPPLY (S6DUM=2 ONLY)

B7 Who is your business's main electricity supplier?

If you have more than one contract across different sites, please answer based on your main site, or the site with the highest energy use

DO NOT READ OUT. SINGLE CODE.

Axpo	1	
BES Utilities	2	
British Gas	3	
Crown Energy	4	
EDF	5	
Engie	6	
E.ON	7	
Drax	8	
Octopus Energy	9	
Opus Energy	10	
Pozitive Energy	11	
Scottish Power	12	
SEFE (formerly GAZPROM)	13	
SmartestEnergy	14	
SSE	15	
Statkraft	16	
Total Energies Gas & Power	17	
Shell Energy	18	
OVO Energy	19	
Valda Energy	20	
Other – Please specify	21	WRITE IN
Don't know	22	

Refused	23	
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ASK IF NAME OF ELECTRICITY SUPPLIER GIVEN (B7=1-21)

B8 Why do you use [INSERT SUPPLIER FROM B7] as your main electricity supplier?

MULTI CODE. DO NOT READ OUT.

INTERVIEWER INSTRUCTION: Code all that apply.

Cheapest option	1	
Best range of products / tariffs	2	
Good customer service	3	
The supplier offers green contracts / products	4	
Have always used them	5	
The supplier is the only one who would offer me a contract	6	
This was recommended to me by third party intermediary (TPI) or an energy broker	7	
Never had an issue with them	8	
Another reason – please specify	9	WRITE IN
DO NOT READ OUT Don't know	10	
DO NOT READ OUT Refused	11	

ASK IF HAS ELECTRICITY MAINS (S6DUM=2)

B9 **Do you have either of the following for electricity?**

READ OUT. SINGLE CODE.

➤	YES	NO	Don't Know
_1 Smart Meter IF NECESSARY: Smart meters automatically send energy usage information over wireless networks to the supplier, and gives detailed usage information to the customer	1	2	3
_2 Automated Meter Reading (AMR) device IF NECESSARY: AMR devices provide monthly meter readings automatically	1	2	3

ASK ALL

B10 **When choosing your current [IF S6DUM=1 ONLY: gas; IF S6DUM=2 ONLY: electricity; IF S6DUM=1 AND 2: gas or electricity] contract or tariff did you consult an energy broker? For the purposes of this question, a price comparison website does not count as an energy broker.**

IF NECESSARY: An energy broker is a company that will find the best possible energy deals for non-domestic customers.

READ OUT. SINGLE CODE.

Yes – and used their services	1	
Yes – but didn't use their services	2	
No	3	
N/A – we have not recently chosen an energy contract/ tariff	4	
Don't know	5	

ASK IF USED A BROKER (B10=1)

B11 **When you used a broker, did they charge you for their services?**

DO NOT READ OUT. SINGLE CODE.

Yes	1	
No	2	

I was not aware that the broker applied charges for their service	3	
Don't know	4	

ASK IF CHARGED (B11=1)

B12 To what extent were the charges the broker applied for their service clear to you?

READ OUT. SINGLE CODE.

Not clear at all	1	
Not very clear	2	
Fairly clear	3	
Very clear	4	
DO NOT READ OUT Don't know / Can't recall	5	
DO NOT READ OUT Refused	6	

ASK IF USED A BROKER (B10=1)

B13 On a scale of 1 to 5, where 1 means 'very dissatisfied', and 5 means 'very satisfied', how satisfied were you with the service provided by your broker?

SINGLE CODE. DO NOT READ OUT.

1 – Very dissatisfied	1	
2	2	
3	3	
4	4	
5 – Very satisfied	5	
Don't know	6	
Refused	7	

ASK ALL

B14 In the past 12 months, have you used any other services from an energy broker or another intermediary?

SINGLE CODE. DO NOT READ OUT.

Yes	1	
No	2	
Don't know	3	

ASK IF USED OTHER BROKER OR INTERMEDIARY SERVICES IN LAST 12 MONTHS (B14=1)

B15 Which services did you use

MULTICODE. READ OUT.

INTERVIEWER INSTRUCTION: Code all that apply.

Comparing prices (e.g. via a telephone service or a price comparison website)	1	
Energy contract management services	2	
Energy efficiency advice	3	
Renewable energy equipment advice e.g. advice about renewable or low carbon energy products, such as solar panels	4	
Flexibility services	5	
Another service – please specify	6	WRITE IN
SINGLE CODE: Don't know	7	DO NOT READ OUT

C Customer service and complaints

IF GAS SUPPLIER KNOWN (B4=1-19)

- C1 **On a scale of 1 to 5, where 1 means ‘very dissatisfied’, and 5 means ‘very satisfied’, how satisfied are you with the overall service that your gas supplier offers?**

SINGLE CODE. DO NOT READ OUT.

1 – Very dissatisfied	1	
2	2	
3	3	
4	4	
5 – Very satisfied	5	
Don't know	6	
Refused	7	

IF DISSATISFIED WITH SUPPLIER (C1=1/2)

- C2 **Can you tell me a bit more about why you are dissatisfied with [INSERT SUPPLIER FROM B4]?**

MULTICODE. DO NOT READ OUT.

INTERVIEWER INSTRUCTION: Code all that apply.

Too expensive	1	
Poor customer service	2	
Difficulty contacting supplier	3	
Not a good range of products / services offered	4	
Billing issues	5	
Poor communication	6	
Poor advice and support	7	
Meter issues e.g. the meter was faulty	8	
Another reason – please specify	9	WRITE IN

Don't know	10	
Refused	11	

IF GAS SUPPLIER KNOWN (B4=1-19)

- C3 **On a scale of 1 to 5, where 1 means 'very difficult', and 5 means 'very easy', thinking about the last time your business tried to contact [INSERT SUPPLIER FROM B4] in the last 12 months, how easy or difficult did you find it to contact them?**

SINGLE CODE. DO NOT READ OUT.

1 – Very difficult	1	
2	2	
3	3	
4	4	
5 – Very easy	5	
I have not tried to contact my supplier	6	
Don't know	7	
Refused	8	

ASK IF NAME OF ELECTRICITY SUPPLIER GIVEN (B7=1-21)

- C4 **On a scale of 1 to 5, where 1 means 'very dissatisfied', and 5 means 'very satisfied', how satisfied are you with the overall service that your electricity supplier offers?**

DO NOT READ OUT. SINGLE CODE.

1 – Very dissatisfied	1	
2	2	
3	3	
4	4	
5 – Very satisfied	5	
Don't know	6	
Refused	7	

IF DISSATISFIED WITH SUPPLIER (C4=1/2)

C5 Can you tell me a bit more about why you are dissatisfied with [INSERT SUPPLIER FROM B7]?

MULTICODE. DO NOT READ OUT.

INTERVIEWER INSTRUCTION: Code all that apply.

Too expensive	1	
Poor customer service	2	
Difficulty contacting supplier	3	
Not a good range of products / services offered	4	
Billing issues	5	
Poor communication	6	
Poor advice and support	7	
Meter issues e.g. the meter was faulty	8	
Another reason – please specify	9	WRITE IN
Don't know	10	
Refused	11	

➤ IF ELECTRICITY SUPPLIER KNOWN (B7=1-15)

C6 On a scale of 1 to 5, where 1 means 'very difficult', and 5 means 'very easy', thinking about the last time your business tried to contact [INSERT SUPPLIER FROM B7] in the last 12 months, how easy or difficult did you find it to contact them?

SINGLE CODE. DO NOT READ OUT.

1 – Very difficult	1	
2	2	
3	3	
4	4	
5 – Very easy	5	

I have not tried to contact my supplier	6	
Don't know	7	
Refused	8	

IF NAME OF GAS AND ELECTRICITY SUPPLIER KNOWN (B2=1-17)

C7 On a scale of 1 to 5, where 1 means 'very dissatisfied', and 5 means 'very satisfied', how satisfied are you with the overall service that your gas and electricity supplier offers?

DO NOT READ OUT. SINGLE CODE.

1 – Very dissatisfied	1	
2	2	
3	3	
4	4	
5 – Very satisfied	5	
Don't know	6	
Refused	7	

➤ IF DISSATISFIED WITH SUPPLIER (C7=1/2)

C8 Can you tell me a bit more about why you are dissatisfied with [INSERT SUPPLIER FROM B2]?

MULTICODE. DO NOT READ OUT.

INTERVIEWER INSTRUCTION: Code all that apply.

Too expensive	1	
Poor customer service	2	
Difficulty contacting supplier	3	
Not a good range of products / services offered	4	
Billing issues	5	
Poor communication	6	
Poor advice and support	7	

Meter issues e.g. the meter was faulty	8	
Another reason – please specify	9	WRITE IN
Don't know	10	
Refused	11	

IF NAME OF GAS AND ELECTRICITY SUPPLIER KNOWN (B2=1-17)

C9 **On a scale of 1 to 5, where 1 means 'very difficult', and 5 means 'very easy', thinking about the last time your business tried to contact [INSERT SUPPLIER FROM B2] in the last 12 months how easy or difficult did you find it to contact them?**

SINGLE CODE. DO NOT READ OUT.

1 – Very difficult	1	
2	2	
3	3	
4	4	
5 – Very easy	5	
I have not tried to contact my supplier	6	
Don't know	7	
Refused	8	

ASK IF TRIED TO CONTACT SUPPLIER IN LAST 12 MONTHS (C3=1-5 OR C6=1-5 OR C9 = 1-5)

C10 **On a scale of 1 to 5, where 1 means 'very dissatisfied', and 5 means 'very satisfied', thinking about the last time your business tried to contact [INSERT SUPPLIER FROM B2, B4, or B7] in the last 12 months, how satisfied or dissatisfied were you with the following:**

READ OUT. SINGLE CODE PER ROW

	1 - Very dissatisfied	2	3	4	5 - Very satisfied	Don't Know	Refused
The time it took to get through to someone who could respond to you	1	2	3	4	5	6	7
How well your supplier understood what you needed	1	2	3	4	5	6	7

	1 - Very dissatisfied	2	3	4	5 - Very satisfied	Don't Know	Refused
How the overall interaction was handled	1	2	3	4	5	6	7
That the overall outcome of the interaction met your needs	1	2	3	4	5	6	7

ASK IF GAS SUPPLIER KNOWN (B4=1-19), NAME OF ELECTRICITY SUPPLIER KNOWN (B7=1-21), OR NAME OF GAS AND ELECTRICITY SUPPLIER KNOWN (B2=1-17)

C10a Now thinking about your energy bills from [INSERT SUPPLIER FROM B2, B4, or B7], on a scale of 1 to 5, where 1 means 'very dissatisfied', and 5 means 'very satisfied', how satisfied or dissatisfied are you with the following:

READ OUT. SINGLE CODE PER ROW.

	1 - Very dissatisfied	2	3	4	5 - Very satisfied	Don't Know	Refused
Ease of understanding my energy bill	1	2	3	4	5	6	7
The accuracy of my energy bill	1	2	3	4	5	6	7
The type of information provided in my energy bill	1	2	3	4	5	6	7

ASK ALL

We'd now like to ask you some questions about any complaints you may or may not have made.

HAVE CONTACTED THEIR SUPPLIER IN THE LAST 12 MONTHS (C3=1-5/7-8 OR C6=1-5/7-8 OR C9=1-5/7-8)

C11 Have you made a complaint to your [IF S6DUM=1 ONLY: gas; IF S6DUM=2 ONLY: electricity; IF S6DUM=1 AND 2: gas or electricity] suppliers in the last 12 months?

DO NOT READ OUT. SINGLE CODE.

Yes	1	
No	2	
Don't know	3	

ASK IF COMPLAINT WAS MADE (C11=1)

C12 What was the issue or issues that led you to make a complaint?

MULTICODE. DO NOT READ OUT.

INTERVIEWER INSTRUCTION: Code all that apply.

Financial		
Billing issues	1	
Overcharging	2	
Increasing prices	3	
Too expensive	4	
Service		
Poor communication	5	
Poor customer service	6	
Difficulty changing personal details	7	
Difficulty changing contracts	8	
Technical		
Issues with my energy supply	9	
Issues with meter installation	10	
Other meter issues	11	
Other		
Problems relating to a broker / third party	12	
Other, please specify	13	
Don't know	14	
Refused	15	

ASK IF COMPLAINT WAS MADE (C11 = 1)

C13 **In your opinion, did your supplier/s resolve the complaint?**

PROMPT AS NECESSARY. SINGLE CODE.

Yes, fully	1	
Yes, partially	2	

No	3	
Complaint still in progress	4	
Don't know	5	

ASK IF A MICRO BUSINESS (A1DUM=1/2 [0 employees or 1-9 employees])

C14 As a micro business, are you aware that you can receive free advice and/or support on energy matters from the following sources:

READ OUT. SINGLE CODE.

	Yes	No	Prefer to not say
_1Citizens Advice	1	2	3
_2Energy Ombudsman	1	2	3

ASK ALL

C15 In the last 12 months, have you used any of the following for external advice on energy related matters?

READ OUT. MULTICODE.

INTERVIEWER INSTRUCTION: Code all that apply.

[ASK IF Sole trader/ micro businesses and aware (C14_1=1)] Citizen's Advice	1	
[ASK IF Sole trader/ micro businesses and aware (C14_2=1)] Energy Ombudsman	2	
Lawyer	3	
Trade association	4	
Other (specify)	5	WRITE IN
SINGLE CODE: None	6	
SINGLE CODE: Don't know	7	

ASK ALL

C16 **To what extent do you agree or disagree that your [IF S6DUM=1 ONLY: gas; IF S6DUM=2 ONLY: electricity; IF S6DUM=1 AND 2: gas or electricity] supplier treats you fairly in their dealings with you?**

Please answer on a scale of 1 to 5, where 1 means ‘strongly disagree’ and 5 means ‘strongly agree’.

READ OUT. SINGLE CODE.

1 – Strongly disagree	1	
2	2	
3	3	
4	4	
5 – Strongly agree	5	
Don't know	6	

D Experience of energy costs

ASK IF HAS GAS MAINS (S6DUM=1)

D1 **Approximately what proportion of your total business costs are spent on your gas bill?**

ADD IF NECESSARY: By 'total costs' we mean all costs incurred by the business, including fixed, variable, direct and indirect costs.

Please provide your best estimate.

DO NOT READ OUT. SINGLE CODE.

Up to 4%	1	
Between 5% and 9%	2	
Between 10% and 19%	3	
Between 20% and 29%	4	
Between 30% and 39%	5	
Between 40% and 49%	6	
50% or more	7	
Don't know	8	
Refused	9	

ASK IF HAS ELECTRICITY MAINS (S6DUM=2)

D2 **And approximately what proportion of your total costs are spent on your electricity bill?**

ADD IF NECESSARY: By 'total costs' we mean all costs incurred by the business, including fixed, variable, direct and indirect costs.

Please provide your best estimate.

DO NOT READ OUT. SINGLE CODE.

Up to 4%	1	
Between 5% and 9%	2	
Between 10% and 19%	3	
Between 20% and 29%	4	
Between 30% and 39%	5	
Between 40% and 49%	6	

50% or more	7	
Don't know	8	
Refused	9	

D3-D6 QUESTIONS DELETED

ASK ALL

D6 **Which ONE of the following statements BEST describes how well your business has been keeping up with [IF S6DUM=1 ONLY: gas; IF S6DUM=2 ONLY: electricity; IF S6DUM=1 AND 2: gas or electricity] bills over the past 12 months?**

READ OUT. SINGLE CODE.

We have been keeping up with electricity and/or gas bills without any difficulties	1	
We have been keeping up with electricity and/or gas bills, but it is a struggle from time to time	2	
We have been keeping up with electricity and/or gas bills, but it is a constant struggle	3	
We are falling behind with some electricity and/or gas bills	4	
We are having real financial problems and have fallen behind with many electricity and/ or gas bills	5	
We are having real financial problems and are in debt to our supplier	6	
DO NOT READ OUT Don't know	7	
DO NOT READ OUT Refused	8	

ASK IF FALLING BEHIND WITH BILLS OR IN DEBT (D6=4-6)

D7 **Has your business been in contact with your [IF S6DUM=1 ONLY: gas; IF S6DUM=2 ONLY: electricity; IF S6DUM=1 AND 2: gas or electricity] supplier about help with paying your bills?**

READ OUT. SINGLE CODE.

Yes – we contacted them	1	
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Yes – they contacted us	2	
No	3	
Don't know	4	
Prefer not to answer	5	

ASK IF FALLING BEHIND WITH BILLS OR IN DEBT (D6=4-6)

D8 When your business [IF FELL BEHIND (D6=4-5): fell behind with energy bills; IF INDEBTED (D6=6) became indebted to your supplier], did you experience any of the following?

READ OUT. MULTI CODE

INTERVIEWER INSTRUCTION: Code all that apply.

My supplier offered the business a debt repayment plan that was suitable to our needs	1	
My supplier offered the business a debt repayment plan that was unsuitable for our needs	2	
My supplier disconnected the business from our energy supply	3	
My supplier did not talk to me about options to help	4	
My supplier did not respond to my contact and sent communications advising of disconnection	5	
Don't know	6	
None of these	7	

ASK ALL

D9 Have you tried to limit or reduce the amount of electricity or gas you used in the last 12 months?

DO NOT READ OUT. SINGLE CODE.

Yes	1	
No	2	
Don't know	3	

ASK IF TRIED TO LIMIT ENERGY USAGE (D9=1)

D10 **In what ways have you tried to limit or reduce the amount of electricity or gas you used in the last 12 months?**

READ OUT. MULTI CODE.

INTERVIEWER INSTRUCTION: Code all that apply.

Limited use of appliances	1	
Increased monitoring of usage	2	
Turned down heating to a lower temperature	3	
Invested in energy efficient technology or appliances (e.g. motion sensor lights, insulation, time controls for heating (please specify))	4	WRITE IN
Encouraged home working	5	
Had an energy assessment or audit	6	
Any other methods (please specify)	7	
Don't know	9	EXCLUSIVE

ASK ALL

D11 **How does your business monitor energy usage in general?**

READ OUT. MULTICODE

INTERVIEWER INSTRUCTION: Code all that apply.

Using smart meters	1	
Checking regular bills	2	
Checking meters	3	
Using third party software or services	4	
In another way [please specify]	5	WRITE IN
Don't know	6	SINGLE CODE
We don't monitor our energy usage	7	SINGLE CODE

E Selecting suppliers

ASK ALL

E1 **Approximately, when was the last time your business switched its [IF S6DUM=1 ONLY: gas; IF S6DUM=2 ONLY: electricity; IF S6DUM=1 AND 2: gas or electricity] supplier(s) or contract?**

If you have more than one contract across different sites, please answer based on the most recent time this happened. This should not include where you have been transferred to another supplier because your supplier went out of business.

PROMPT IF NECESSARY. SINGLE CODE.

Within the last 3 months	1	
Longer than 3 months ago, but within the last 6 months	2	
Longer than 6 months ago, but within the last 9 months	3	
Longer than 9 months ago, but within the last 1 year	4	
Longer than 1 year ago, but within the last 2 years	5	
Longer than 2 years ago, but within the last 5 years	6	
Longer than 5 years ago	7	
DO NOT READ OUT: N/A – we have been with the same energy supplier since we started operating	8	
DO NOT READ OUT Don't know	9	
DO NOT READ OUT Refused	10	

ASK IF SWITCHED IN PAST 12 MONTHS (E1=1-4)

E2 **What prompted you to switch [IF S6DUM=1 ONLY: gas; IF S6DUM=2 ONLY: electricity; IF S6DUM=1 AND 2: gas or electricity] supplier or contract in the last 12 months?**

DO NOT READ OUT. MULTI CODE.

INTERVIEWER INSTRUCTION: Code all that apply.

A price increase notification from your previous supplier	1	
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You were not satisfied with the customer service from your previous supplier	2	
A renewal notice from your existing supplier	3	
Knowing your contract was coming to an end / your contract had ended	4	
A broker/consultant recommended switching	5	
We were offered a better deal from a new supplier	6	
We were offered a new contract from our existing supplier	7	
We wanted a better deal for our energy	8	
We reviewed energy costs	9	
Following preparation of our annual accounts	10	
Seeing our contract end date on our bill / seeing date for notification of termination of contract on our bill	11	
Our previous supplier closed down	12	
We moved premises	13	
My previous supplier informed me they would not renew my contract	14	
Other – Please specify	15	WRITE IN
Don't know	16	EXCLUSIVE
I did not look for a new supplier or contract in the last 12 months	17	EXCLUSIVE
Refused	18	EXCLUSIVE

ASK IF SWITCHED IN PAST 12 MONTHS (E1=1-4)

E2a And why did you choose the new contract or supplier you ended up with?

DO NOT READ OUT. MULTI CODE.

INTERVIEWER INSTRUCTION: Code all that apply.

A lower price contract price or tariff	1	
A supplier offered savings for having a combined gas and electricity contract	2	
A new supplier offered better customer service	3	
A new supplier offered better energy efficiency products or initiatives	4	
Broker or intermediary recommended it	5	
The supplier offered green contracts / products	6	
Other (Please specify)	7	
We had no choice over the new contract / supplier	8	EXCLUSIVE
Don't know	9	EXCLUSIVE
None of these	10	EXCLUSIVE
Refused	11	EXCLUSIVE

ASK IF SWITCHED IN PAST 12 MONTHS (E1=1-4)

E3 On a scale of 1 to 5, where 1 is 'very difficult' and 5 is very easy, how easy or difficult did you find the switching process?

DO NOT READ OUT. SINGLE CODE.

1 – Very difficult	1	
2	2	
3	3	
4	4	
5 – Very easy	5	
Don't know	6	
Refused	7	

ASK IF SWITCHED IN PAST 12 MONTHS (E1=1-4)

E3a How far in advance of your current contract starting did you agree it with your supplier?

SINGLE CODE. READ OUT.

Up to 3 months before the contract started	1	
From 3 and up to 6 months before the contract started	2	
From 6 and up to 12 months before the contract started	3	
At least a year before the contract started	4	
DO NOT READ OUT Don't know	5	
DO NOT READ OUT Refused	6	

ASK ALL

E4 **Are you thinking about switching your [IF S6DUM=1 ONLY: gas; IF S6DUM=2 ONLY: electricity; IF S6DUM=1 AND 2: gas or electricity] supplier(s) or contract when your contract comes to an end?**

DO NOT READ OUT. SINGLE CODE.

Yes	1	
No	2	
Don't know	3	

ASK IF NOT PLANNING TO SWITCH WHEN CONTRACT ENDS (E4=2)

E5 **Why aren't you planning to switch supplier or contract when your contract ends?**

DO NOT READ OUT. MULTI CODE.

INTERVIEWER INSTRUCTION: Code all that apply.

Satisfied with your existing supplier	1	
Switching would not result in significant savings	2	
Comparing prices is too difficult	3	
It's too difficult to switch	4	
It's too much hassle / switching would take too long	5	
Prefer to stay with supplier you know	6	
You don't want to deal with sales people	7	

You are too busy	8	
Other – Please specify	9	WRITE IN
Don't know	10	EXCLUSIVE
None of these	11	EXCLUSIVE
Refused	12	EXCLUSIVE

ASK ALL

E6 Have any of your energy contracts ended in the last 12 months?

DO NOT READ OUT. SINGLE CODE

Yes	1	
No	2	
Don't know	3	

ASK IF ANY ENERGY CONTRACTS ENDED IN THE LAST 12 MONTHS (E6=1)

E7 Has your business experienced any of the following?

READ OUT. MULTI CODE

INTERVIEWER INSTRUCTION: Code all that apply.

We went onto a deemed contract	1	
We went onto an out of contract rate	2	
We experienced very few or no offers to contract	3	
We were asked for a security deposit or to pre-pay the first bill to secure our contract	4	
We were offered a new contract but unable to afford the rates that were offered	5	
Don't know	6	
None of these	7	

ASK ALL

E8 **To what extent do you agree or disagree with each the following statements about the energy market for businesses such as yours?**

READ OUT. SINGLE CODE PER ROW.

	Strongly disagree	Tend to disagree	Neither agree nor disagreed	Tend to agree	Strongly agree	Don't Know
I think there is sufficient choice in the range of <u>energy suppliers</u> in the energy market for businesses	1	2	3	4	5	6
I think there is sufficient range in the choice of <u>prices</u> in the energy market for businesses	1	2	3	4	5	6
I think there is sufficient range in the choice of <u>contracts</u> in the energy market for businesses	1	2	3	4	5	6
I think there is sufficient choice in the range of <u>products and services</u> in the energy market for businesses	1	2	3	4	5	6
I understand what makes up our energy bill	1	2	3	4	5	6
I understand how my business's energy usage relates to how much is on the bill	1	2	3	4	5	6

F Energy Efficiency

ASK ALL

- F1 I'm now going to list a set of technologies and approaches which aim to reduce carbon emissions. I'd like to know for each whether your business already utilises or implements them; whether you have plans to utilise them; or whether you have no plans to utilise them.

READ OUT. SINGLE CODE.

	Not planning to utilise or implement	Has plans to utilise or implement	Already utilises, implements or has installed	Don't Know
Behavioural changes within the business to improve energy efficiency <i>ADD IF NECESSARY: changes to business culture/day to day actions, (i.e. encouraging staff to turn off lights not being used, etc)</i>	1	2	3	4
Energy efficient technologies and processes <i>ADD IF NECESSARY: measures/technologies for business activities (i.e., updating equipment to ones that consume less energy)</i>	1	2	3	4
Energy efficient building improvements <i>ADD IF NECESSARY: the energy consumption related to the actual building (i.e. installing better wall insulation)</i>	1	2	3	4

ASK ALL

F2 Have you taken any of the following actions?

READ OUT. SINGLE CODE PER ROW.

	Yes	No	Don't know	N/A
Installed electric vehicle charging points	1	2	3	4
Installed your own renewable electricity or heating	1	2	3	4
Used a hybrid or electric car or van	1	2	3	4
Installed commercial battery storage for electricity	1	2	3	4
Installed heat pumps (ground source or air source)	1	2	3	4
Procured a green energy contract	1	2	3	4
Procured energy from local or community-based renewable energy programmes	1	2	3	4
Used demand-side response measures (e.g. shifting the business's time of usage in response to signals received from the grid)	1	2	3	4
Used renewal power purchase agreements	1	2	3	4
Used combined heat and power	1	2	3	4
Used bundled services (e.g. a bundled tariff and technology offer from the same supplier)	1	2	3	4

ASK ALL

F3 What barriers are affecting your ability to reduce your business's carbon emissions?

DO NOT READ OUT. MULTI CODE.

INTERVIEWER INSTRUCTION: Code all that apply.

Don't have internal skills required	1	
Limited knowledge of decarbonisation	2	
Perceived upfront costs	3	
Perceived ongoing costs	4	
Perceived costs (unspecified)	5	
Payback period	6	
Other priorities (please specify)	7	WRITE IN
Lack of time	8	

Limited ability to make changes as business does not own the premises	9	
Limited ability to make changes as the business shares the building with other organisations	10	
Limited availability of service providers	11	
Not knowing what actions make the most difference	12	
Lack of motivation/ interest in reducing carbon emissions	13	
Anything else – please specify	14	WRITE IN
N/A – There are no barriers	15	EXCLUSIVE
Don't know	16	EXCLUSIVE

ASK ALL

F4 Some suppliers offer energy contracts where the price a business pays for energy varies throughout the day, depending on demand for and availability of power on the grid.

Would it be possible for your business to change the amount of energy it used at different times of the working day, to make the most of prices changing throughout the day?

READ OUT. SINGLE CODE.

Yes , it would definitely be possible	1	
Yes, it might be possible	2	
No, it would not be possible	3	
Don't know	4	

ASK ALL

F5 Is your business currently on a contract where the price paid for energy varies throughout the day?

READ OUT. SINGLE CODE.

Yes	1	
No	2	
Don't know	3	

G Recontact & Close

ASK ALL

- G1 As part of this research, we are also conducting some longer in-depth interviews to further explore the experiences of businesses such as yours. Would you be willing to be contacted by IFF Research in the next few months to discuss taking part in a follow-up interview?**

If you do take part in a follow up interview, we would offer a £40 payment for your time, payable to you via an Amazon voucher or via PayPal, or as a charity donation.

Yes	1	
No	2	

ASK ALL

- G2 Would you be willing for us to contact you again?**

	YES	NO
_1 Regarding this particular study, if we need to clarify any information?	1	2
_2 For other research on related subjects	1	2

ASK ALL WILLING TO BE RECONTACTED (G1=1 OR G2_1 = 1 OR G2_2 =1)

- G3 And can I just confirm the best contact details to reach you on?**

Name:	
Business name:	
Job title:	
Email:	
Direct line telephone number:	
Payment method:	Amazon or PayPal

Charity donation:	<p>TAKE PREFERRED CHARITY FROM:</p> <ul style="list-style-type: none">• Great Ormond Street Hospital• British Heart Foundation• Macmillan Cancer support• Shelter• Celia Hammond Animal Trust• Mind• Centrepont
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READ TO ALL

G4 Just to confirm, we'll be keeping your anonymised responses to the interview for analysis purposes and if you'd like a copy of your data, to change your data or for your data to be deleted then please get in contact with the team at IFF Research at OfgemEnergySurvey@IFFResearch.com or on 0207 250 3035. You also have a right to lodge a complaint with the Information Commissioners Office (ICO) and you can do so by calling their helpline on 0303 123 1113.

THANK RESPONDENT AND CLOSE INTERVIEW

Finally, I would just like to confirm that this survey has been carried out under IFF instructions and within the rules of the MRS Code of Conduct. Thank you very much for your help today.

Survey Appendix B: Reassurance Email

SUBJECT LINE: Ofgem Research: Exploring Experiences of the Energy Market (Non-Domestic Customers)

Dear NAME,

Thank you for considering participating in this research study, which the Office for Gas and Electricity Markets (Ofgem) have commissioned IFF Research, an independent research agency, to conduct.

We are inviting you to take part in a survey looking to explore and understand companies' experiences in the energy market. The survey will ask questions about your energy contract(s), your experience of your energy supplier, your views on the energy market more generally, and any decarbonisation activities you undertake. The results from the survey will help Ofgem develop policy that can support business's respond to their energy needs.

Your business has been selected at random from Market Location's Business Database and we hope very much that you are able to take part. Participation will involve a telephone interview lasting around 20 minutes at a time that is convenient for you before **Friday 23rd August**.

All your answers will remain confidential and will not be reported in any way that would allow you or your business to be identified. All research we conduct complies with the Market Research Society Code of Conduct and the Data Protection Act, which means that the data collected will only be reported in the form of aggregated statistics, and individuals and businesses will not be identified. If you wish to check IFF's credentials, you can call the MRS, free of charge, on 0800 975 9596. If you would like to find out any more information about IFF's GDPR policy, please visit <https://www.iffresearch.com/gdpr/>

If you are happy to take part in an interview, or if you have any further questions relating to the study please contact us at OfgemEnergySurvey@IFFResearch.com.

Kind regards,

Andrew Skone James,
Director, IFF Research

Survey Appendix C: Confirmation Email

SUBJECT LINE: Ofgem Research: Exploring Experiences of the Energy Market (Non-Domestic Customers)

Dear NAME,

Thank you very much for agreeing to participate in this valuable research for Ofgem, exploring companies' experiences of the energy market. The survey will ask questions about your energy contract(s), your experience of your energy supplier, your views on the energy market more generally, and any decarbonisation activities you undertake.

This email is to confirm that one of IFF Research's senior interviewers will contact you on PHONE on DATE at TIME to conduct an interview.

The interview will take around 20 minutes, depending on how much you have to say.

All research we conduct complies with the Market Research Society Code of Conduct and the Data Protection Act, which means that the data collected will only be reported in the form of aggregated statistics and individuals will not be identified.

If you have any questions about the interview or would like to arrange an alternative time to take part, please contact us at OfgemEnergySurvey@IFFResearch.com.

Kind regards,

INTERVIEWER NAME

Appendix D: Topic Guide

Introduction

INTERVIEWER USE ONLY – Research Objectives

- To understand businesses' experiences with their energy bills.
- To understand businesses' experiences with energy company's complaints handling processes.
- To understand businesses' experiences with switching energy suppliers and using brokers.

- **Interviewer introduces themselves:** My name is [NAME], and I work for IFF Research, an independent research company. We've been commissioned by Ofgem, the regulator for gas and electricity in Great Britain, to conduct this research into your company's experiences of the energy market. The interview should last around 45 minutes, depending on what you have to say.
- **ADD IF NECESSARY:** Ofgem is the independent regulator for energy in Great Britain. Its role is to protect consumers, like yourselves, by promoting value for money and the security and sustainability of the energy supply. This is not a sales exercise in any way.
- **Reassurances:** IFF Research is an independent market research company, operating under the strict guidelines of the Market Research Society's Code of Conduct. We will not disclose to Ofgem who has taken part in the research and your responses will be **completely anonymous** so neither you nor your organisation will be identifiable in any reporting. All information you provide will be used for research purposes only. All names and contact details are deleted at the earliest opportunity – and no more than 12 months after the end of the project. You have the right to have a copy of your data, change your data, or withdraw from the research at any point. If you'd like to do this, you can consult our website at www.iffresearch.com/gdpr
- **Incentive:** As a thank you for taking part in this follow-up research, you will receive a £40 payment, which is payable via PayPal, Wise, or as a charity donation. We will take details from you at the end of the interview based on your choice.
- **Permission to record:** Just so I don't have to rely solely on taking notes do you give your permission for me to records the interview? **ADD IF NECESSARY:** The recording will be stored on an encrypted area of our server at IFF and only the IFF researchers and IFF's in-house quality assurers will have access to it.
- **ADD IF NECESSARY:** If you would like to get more information about the aims and objectives of the research, you can contact:
 - Ofgem: Dr Michael Kattirtzi at consumer.first@ofgem.gov.uk
 - IFF: Annie Avis at ofgemenergysurvey@iffresearch.com or on 0207 250 3035
 - MRS: Market Research Society on 0800 975 9596

A Introduction, organisation needs and priorities (5 mins)

A1 **Just to start, could you give me a bit of background about your organisation?**

PROBE: WHAT IS THE MAIN ACTIVITY OF THE ORGANISATION?

PROBE: HOW LONG HAS IT BEEN OPERATING?

A2 **Could you tell me about your role within the organisation?**

PROBE: WHAT ARE YOUR MAIN RESPONSIBILITIES IN THIS ROLE? WHERE DOES ENERGY FIT INTO THIS?

PROBE: WHAT TYPE OF INVOLVEMENT DO YOU HAVE WITH ORGANISATION'S ENERGY USAGE OR COSTS? PROBE FOR: SELECTING SUPPLIERS, ARRANGING CONTRACTS, PAYING BILLS, MEASURING USAGE, MAKING OTHER ENERGY-RELATED DECISIONS.

A3 **When you took part in the recent telephone survey, you said your organisation uses [TYPE OF ENERGY AT Surv_S6]. Is this correct?**

Can you talk me through what activities your organisation carries out that use energy on a day-to-day basis? This may be general running costs (e.g. lighting and heating), as well as any more specific activities like running machinery or tools .

PROMPTS: EXAMPLES OF ACTIVITIES THAT REQUIRE ENERGY USE, SUCH AS, HEATING, COOLING, LIGHTING, POWERING TOOLS OR EQUIPMENT, OPERATING MACHINERY, OTHER INDUSTRIAL PROCESSES ETC.

A4 **What are your general views on the energy market at the moment?**

A5 **Have you observed or experienced any recent changes in the market that have had an effect on your business?**

INTERVIEWERS, PLEASE PROBE BEYOND PRICE IF APPLICABLE

SPECIFICITY: CAN YOU ELABORATE ON THE SPECIFIC CHANGES YOU'VE NOTICED?

TIMING: WHEN DID YOU FIRST START NOTICING THESE CHANGES?

REVENUE: HOW HAVE THESE CHANGES IMPACTED YOUR REVENUE OR PROFITABILITY?

ADAPTATION: HOW HAS YOUR COMPANY RESPONDED TO THESE CHANGES? HAVE YOU MADE ANY STRATEGIC ADJUSTMENTS OR OPERATIONAL CHANGES?

RISK MITIGATION: WHAT STEPS HAVE YOU TAKEN TO MITIGATE THE POTENTIAL RISKS ASSOCIATED WITH THESE MARKET CHANGES?

A6 **What are your general views of [ENERGY SUPPLIER AT SURV_B2/B4/B13] as your energy supplier?**

ASK IF ANSWERED QUESTION IN SURVEY ABOUT BEING TREATED FAIRLY OR UNFAIRLY BY SUPPLIER

A7 In the survey, you said that you feel you are generally treated [FAIRLY / UNFAIRLY] by your energy supplier. Can you tell me why please?

PROBE: WHAT DOES FAIR TREATMENT FROM YOUR SUPPLIER MEAN TO YOU?

ASK IF DID NOT ANSWER QUESTION IN SURVEY ABOUT BEING TREATED FAIRLY OR UNFAIRLY BY SUPPLIER

A8 Do you feel as though you are treated fairly or unfairly by your supplier? Can you tell me why please?

PROBE: WHAT DOES FAIR TREATMENT FROM YOUR SUPPLIER MEAN TO YOU?

A9 What are the current needs and priorities for your organisation regarding your energy supply? What are the biggest challenges around meeting these needs?

INTERVIEWERS, PLEASE PROBE BEYOND PRICE IF APPLICABLE.

- *ARE THERE ANY PARTICULAR ENERGY SOURCES THAT YOUR ORGANISATION IS PRIORITISING OR AVOIDING?*
- *WHAT STEPS (IF ANY) HAS YOUR ORGANISATION TAKEN TO IMPROVE ENERGY EFFICIENCY IN RECENT YEARS?*
- *DO YOU HAVE ANY SUSTAINABILITY GOALS RELATED TO ENERGY, WHICH YOU ARE STRUGGLING TO REACH?*
- *CAN YOU ELABORATE ON ANY SPECIFIC CHALLENGES YOUR ORGANISATION IS FACING IN TERMS OF ENERGY SUPPLY?*
- *WHAT ARE THE KEY OBSTACLES YOUR ORGANISATION EXPERIENCES IN MANAGING ITS ENERGY CONSUMPTION?*

B Affordability (5-10 mins)

This section is to understand what factors play a role in whether businesses are able to pay energy bills with or without difficulty.

ASK ALL

- B1 What is general affordability like for your business? Have there been any factors affecting your business's ability to keep up with energy bills?**

PROBE: OTHER THAN ENERGY BILLS, ARE YOU STRUGGLING TO PAY FOR ANY OTHER ASPECTS OF YOUR BUSINESS? IF YES, HOW IS PAYING FOR ENERGY MANAGED DIFFERENTLY?

ASK B2-B3 IF STRUGGLED WITH ENERGY BILLS IN THE LAST 12 MONTHS (SURV_D6=2-6)

- B2 During the telephone survey, you mentioned that your organisation has struggled with energy bills in the past 12 months. Can you tell us a bit more about this, and the affect it is having on your organisation?**

- B3 How long has your business been struggling with energy bills for?**

PROBE: IS IT EASIER OR HARDER COMPARED TO LAST YEAR?

PROBE: WHAT'S CHANGED?

ASK B4-B5 IF NOT STRUGGLED WITH ENERGY BILLS IN THE LAST 12 MONTHS (SURV_D6=1)

- B4 During the telephone survey, you said that your organisation has not struggled with energy bills in the past 12 months. Can you tell us a bit more about this, is your business doing anything specific to manage your bills?**

- B5 Have you previously struggled to pay your energy bills?**

PROBE: IF YES, WHAT HAS CHANGED?

ASK ALL

- B6 Looking ahead, do you have any concerns about your business's ability to afford energy bills in the future?**

IF YES, WHY?

IF YES, IS YOUR ORGANISATION PLANNING TO MAKE ANY CHANGES TO MANAGE YOUR CONCERNS?

IF NO, WHY NOT? DO YOU HAVE ANY PLANS OR PROCESSES IN PLACE TO MANAGE AFFORDABILITY?

C Your understanding of bills (5-10 mins)

This section is to explore your understanding of energy bills. We would like to understand how businesses engage with their energy bills.

ASK ALL FOR WHOLE SECTION

C1 Can you tell me how often you look at your energy bills?

PROMPTS: AS SOON AS THEY ARE RECEIVED, WHEN I GET AROUND TO DO IT, WHEN DOING MONTHLY, QUARTERLY, OR ANNUAL ACCOUNTS.

C2 What sort of information do you get in your bills?

PROBES:

HOW DOES YOUR UNDERSTANDING OF YOUR BILLS COMPARE TO DOMESTIC BILLS OR OTHER BILLS YOU RECEIVE?

HOW WELL DOES YOUR BILL HELP YOU UNDERSTAND HOW AND WHERE YOU'RE USING ENERGY IN THE BUSINESS? WHY/ WHY NOT?

C3 Do you feel that you understand what makes up your energy bill?

PROBES:

WHAT DO YOU UNDERSTAND? IS THERE ANYTHING THAT YOU DON'T UNDERSTAND?

HAS UNDERSTANDING YOUR BILLS GOTTEN EASIER? HOW SO? ARE THERE PARTS THAT ARE EASIER TO UNDERSTAND?

HOW DOES YOUR BILL HELP YOU TO MAKE DECISIONS ON HOW YOU USE ENERGY?

C4 What do you need from an energy bill to make it useful?

PROMPTS: CERTAIN TYPES OF INFORMATION, ACCURACY OF THAT INFORMATION, IT NEEDS TO BE EASY TO UNDERSTAND. IF YOU HAD THAT INFORMATION, WHAT WOULD YOU DO DIFFERENTLY?

PROBE: WHAT IS IN YOUR ENERGY BILL THAT YOU ARE MOST INTERESTED IN OR YOU FIND MOST USEFUL?

D Complaints (10 mins)

ASK IF DID NOT MAKE A COMPLAINT

- D1 **In the survey, you indicated that you haven't made a complaint in the last 12 months. Can I confirm if that is that still the case?**

IF THEY HAVE MADE A COMPLAINT SINCE THE SURVEY, PLEASE ASK THIS SECTION

ASK THIS SECTION IF MADE A COMPLAINT

This section is to understand your expectations about how a supplier would handle complaints, and your experiences of raising complaints.

In the telephone survey, you indicated that you had contacted your electricity and/or gas supplier to make a complaint in the last 12 months.

ASK ALL D2-D10

- D2 **What was the complaint about? How did this issue affect your organisation?**

PROBE: DISTRACTION FROM OTHER PRIORITIES, IMPACT ON FINANCIAL DECISIONS

I would like to understand your experience of the complaint-handling process.

- D3 **How did you make the complaint?**

PROBE: IF BY PHONE: HOW EASY OR DIFFICULT DID YOU FIND IT TO FIND THE CORRECT CONTACT DETAILS, HOW LONG DID YOU HAVE TO WAIT TO SPEAK TO SOMEONE, DID YOU SPEAK TO SOMEONE WHO COULD HELP?

IF WRITTEN COMMUNICATION (EMAIL, WEB FORM ETC): HOW EASY OR DIFFICULT DID YOU FIND IT TO FIND THE CORRECT CONTACT DETAILS, HOW LONG DID YOU WAIT FOR A REPLY?

- D4 **How did you find contacting your supplier to initially raise a complaint?**

- D5 **Did you find the right person to contact/ speak to?**

PROBE: HOW EASY OR DIFFICULT WAS IT TO GET THROUGH TO THE RIGHT PERSON? HOW LONG DID YOU HAVE TO WAIT?

- D6 **Did you have to contact them more than once?**

IF YES, WHY?

- D7 **You said in the survey that the complaint (IF Surv_C13=1/2: was fully or partially resolved) (IF Surv_C13=3: was not resolved) (IF Surv_C13=4 was still in progress). Is this still the case?**

IF COMPLAINT WAS RESOLVED/PARTIALLY RESOLVED (Surv_C13=1/2): Can you talk me through the process you went through to have your complaint resolved? How satisfied were you with the resolution? How long did it take to resolve the complaint?

IF COMPLAINT WAS NOT RESOLVED (Surv_C13=3): Can you tell me what has happened so far? How long has it been since you raised the complaint? Do you intend to continue pursuing the complaint with your supplier? Will you take your dispute somewhere else? How satisfied have you been with the complaint handling process? Does your supplier consider the complaint resolved/closed?

IF COMPLAINT WAS STILL IN PROGRESS (Surv_C13_4): What is the current status of the complaint? Do you expect it to be resolved soon? How satisfied have you been with the complaint handling process? Why or why not? If it is not resolved to your satisfaction, will you take your complaint somewhere else?

PROBE OMBUDSMAN IF MICRO.

D8 What expectations did you have about how your supplier would handle the complaint, before you made it?

PROBE: WHAT DID YOU THINK THE OUTCOME WOULD BE? WHAT MADE YOU THINK THIS?

PROBE: HOW DO THOSE INITIAL EXPECTATIONS COMPARE TO YOUR ACTUAL EXPERIENCE WITH THIS COMPLAINT?

D9 What does an organisation like yours need from the complaint-handling process for it to work effectively, from your perspective?

PROBE: THIS COULD INCLUDE SPEED OF RESOLUTION, CUSTOMER SERVICE STANDARDS, OUTCOMES

D10 Did you seek external advice or support during your complaint?

Yes	1	
No	2	
Don't know	3	

ASK IF NO (D9=2)

D11 Why not?

ASK IF DID SEEK EXTERNAL ADVICE OR SUPPORT (D9=YES)

D12 Who did you seek external advice or support from? Why this organisation/body? What did you think they could do?

PROBE: HOW DID YOU FIND OUT ABOUT THIS EXTERNAL ADVICE SOURCE?

ASK IF DID SEEK EXTERNAL ADVICE OR SUPPORT (D9=YES)

D13 Did they help you to resolve the complaint?

PROBE: IF YES: HOW? IF NOT: WHAT DID THEY ADVISE, WHAT HAPPENED?

ASK IF A MICRO BUSINESS

D14 **Were you aware of and did you use external advice services like Citizens Advice or the Energy Ombudsman during your complaint?**

Was aware of and used	1	
Was aware of but didn't use	2	
Was not aware of and didn't use	3	

ASK IF AWARE OF BUT DIDN'T USE EXTERNAL ADVICE SERVICES (D13=2)

D15 **Why didn't you use these external advice services?**

PROMPTS:

- *WHAT STOPPED YOU FROM REACHING OUT FOR EXTERNAL ADVICE?*
- *WHAT COULD THESE ORGANISATIONS DO TO BETTER SUPPORT BUSINESSES LIKE YOURS?*

IF AWARE OF AND USED EXTERNAL ADVICE SERVICES (D13=1)

D16 **Were they helpful? Tell me about your experience using them.**

PROMPTS:

- *TELL ME ABOUT YOUR EXPERIENCE USING THEM*
- *WHAT WENT WELL? WHAT COULD'VE BEEN BETTER?*

E Experience of using brokers (10 - 15 mins)

ASK THIS SECTION TO THOSE WHO HAVE SWITCHED ENERGY SUPPLIER IN THE LAST 12 MONTHS (SURV_ E1=1-4)

This section is to examine experiences with the switching process and use of energy brokers.

ASK ALL

E1 Have you had an energy broker deal with your energy bills?

PROBE: IF YES, WHY HAVE YOU CHOSEN TO DO THIS? WHAT IS THAT EXPERIENCE LIKE?

ASK ALL

E2 When you last switched energy supplier, did you use an energy broker or did you deal directly with the supplier?

PROMPT IF NECESSARY: AN ENERGY BROKER IS A COMPANY THAT WILL FIND THE BEST POSSIBLE ENERGY DEALS FOR NON-DOMESTIC CUSTOMERS.

Broker	1	
Supplier	2	

ASK ALL

E3 Did you contact them or did they contact you?

IF BROKER INITIATED CONTACT, HOW DID THEY IDENTIFY THEMSELVES? WERE THEY CLEAR THAT THEY WERE A BROKER/ SUPPLIER TO YOU?

PROBE: HOW CONFIDENT WERE YOU IN DISTINGUISHING BETWEEN A BROKER AND AN ENERGY SUPPLIER DURING THE SWITCHING PROCESS?

ASK ALL

E4 Does it matter to you whether it's an energy broker or a supplier who offers you a deal? Why/why not?

ASK IF CONSULTED AN ENERGY BROKER BUT DIDN'T USE THEIR SERVICES

E5 You said in the telephone survey that you consulted with an energy broker but decided not to use their services, is that correct?

PROBES:

- *WHAT WERE THE REASONS BEHIND THAT? WHY DID YOU DECIDE AGAINST USING THE BROKER? WHAT WAS THE POINT YOU DECIDED NOT TO USE THEM?*

- *CAN YOU TELL ME A BIT MORE ABOUT THE SITUATION? WHAT WERE YOUR CONSIDERATIONS WHEN POTENTIALLY LOOKING AT USING A BROKER? WHAT DO YOU THINK A BROKER WOULD DO?*
- *HOW DID YOU IDENTIFY POTENTIAL BROKERS?*
- *WOULD YOU EVER RECONSIDER USING A BROKER IN FUTURE? WHAT FOR?*

IF USED AN ENERGY BROKER FOR SWITCH (E2=1)

- E6 Did you ever discuss switching suppliers over the phone with a broker? If so, did you agree to a switch verbally? If yes, were you made aware that verbal agreement is legally binding?**

IF USED AN ENERGY BROKER FOR SWITCH (E2=1)

- E7 Can you tell me more about your experience with the broker during the switch?**

PROBES: WHAT WAS THE SERVICE LIKE? WHAT, IF ANYTHING, WERE YOU SATISFIED/DISSATISFIED WITH? WHAT WERE YOU HOPING THE BROKER COULD DO FOR YOU?

PROMPT: FIND A DEAL YOU COULDN'T, SAVE TIME, PROVIDE BETTER SERVICE THAN A SUPPLIER?

ASK IF WAS CHARGED BY ENERGY BROKER

- E8 Are you aware if you were charged by the energy brokers? How do you know? What services did the energy broker charge your organisation for?**

PROBES:

- *DID YOU RECEIVE AN OUTLINE OF COSTS FROM THE BROKER?*
- *HOW DO OR DID YOU PAY THE BROKER FOR THEIR SERVICES? (E.G. ONE OFF COST, MONTHLY, ANNUAL)*
- *IF RESPONDENT MENTIONS NOT BEING CHARGED: IS THERE A REASON WHY YOU THINK YOU WERE NOT CHARGED?*

ASK IF WAS CHARGED BY ENERGY BROKER

- E9 You said during the survey that the charges were [not clear at all; not very clear; fairly clear; very clear]. Why is that?**

PROMPTS:

- *IF NOT CLEAR/NOT VERY CLEAR: WHAT WAS NOT CLEAR ABOUT IT? (E.G. TIMING OF CHARGES, FEE STRUCTURE) WHAT DO YOU THINK COULD HAVE MADE IT CLEARER?*

ASK IF WAS CHARGED BY ENERGY BROKER

- E10 Did you consider the charges to be fair? Why?/ Why not?**

ASK IF DID NOT USE AN ENERGY BROKER FOR SWITCH / WENT THROUGH SUPPLIER
(E2=2)

E11 Why didn't you use an energy broker for your switch?

PROBE: GENERAL PERCEPTIONS OF BROKERS

ASK IF DID NOT USE AN ENERGY BROKER FOR SWITCH / WENT THROUGH SUPPLIER
(E2=2)

E12 What would have made you more likely to use an energy broker's services?

PROBE: DO THEY TRUST BROKERS? DO THEY KNOW WHO TO SPEAK TO? DO THEY UNDERSTAND HOW THE CHARGES WORK?

ASK ALL

E13 Have you ever used an energy broker for any services besides switching?

PROBE: IF SO, WHAT SERVICE WERE THEY? HOW WOULD YOU RATE YOUR EXPERIENCE?

ASK ALL

E14 Have you used an energy broker for any other utilities?

PROBE: HOW WAS YOUR EXPERIENCE DIFFERENT FROM SWITCHING ENERGY SUPPLIER

F Net Zero/ Decarbonisation behaviours (5 mins)

ASK THIS SECTION IF RESPONDENT DID NOT ANSWER EITHER SECTION B OR E (FOR TIMING CONSTRAINTS)

ASK ONLY F6 IF NO TIME FOR THIS WHOLE SECTION

This section is to understand interest, motivation and barriers to implementing decarbonisation activities

ASK ALL WHOLE SECTION

F1 What does “decarbonisation” mean to you, and how do you think it could affect your business?

INTERVIEWERS PLEASE PROBE BEYOND JUST COST ISSUES HERE IF DESCRIBED AS A BARRIER

CAN YOU ELABORATE ON WHAT SPECIFIC ACTIONS OR STRATEGIES YOU BELIEVE ARE NECESSARY TO ACHIEVE DECARBONISATION?

HOW DO YOU ENVISION THE TIMELINE FOR SIGNIFICANT DECARBONISATION EFFORTS IN YOUR INDUSTRY?

ARE YOU FAMILIAR WITH ANY SPECIFIC DECARBONISATION TECHNOLOGIES OR INITIATIVES THAT COULD BE RELEVANT TO YOUR BUSINESS?"

HOW DO YOU STAY INFORMED ABOUT THE LATEST DEVELOPMENTS AND TRENDS IN DECARBONISATION POLICIES AND REGULATIONS?

F2 Do you believe there are barriers to your business adopting decarbonisation approaches? Why?/ Why not?

INTERVIEWERS PLEASE PROBE BEYOND JUST COST ISSUES HERE IF DESCRIBED AS A BARRIER

IF NECESSARY: BY DECARBONISATION APPROACHES, WE ARE REFERRING TO STEPS BUSINESSES CAN TAKE TO REDUCE IT'S CARBON FOOTPRINT.

IF YES, WHAT WOULD YOU NEED TO BE ABLE TO TAKE THESE APPROACHES UP?

IF NO BARRIERS, WHY DID YOU SAY THERE ARE NO BARRIERS TO DECARBONISING APPROACHES FOR YOUR BUSINESS? ARE YOU DOING THEM ALL?

F3 Do you believe your business's actions can make a meaningful difference in reducing carbon emissions? Have you done anything? Why not or Why these things?

F4 Do you feel that reducing your business’s carbon emissions is a priority?

Yes	1	
No	2	
Don't know	3	

F5 Why do you think that is?

PROMPTS IF F4=1: ENVIRONMENTAL CONCERNS, FINANCIAL INCENTIVES

PROMPTS IF F4=2: LACK OF CONTROL, NOT ENOUGH SUPPORT, LIMITED KNOWLEDGE

F6 In the survey, you mentioned that it [WOULD / WOULD NOT BE POSSIBLE] for your business to change the amount of energy used a different times of the working day, to make the most of off-peak rates on a variable contract. Please can you elaborate on the reasons why you say it [WOULD / WOULD NOT BE POSSIBLE] for your business?

G Thank and close (3 mins)

G1 **Thank you for your time today. Before we finish, is there anything else you'd like to add about the topics we've discussed today?**

G2 **Would you be willing for us to get back in touch regarding...?**

This particular study – if we need to clarify any of the information	1	
Other research studies which may be relevant to you	2	
DO NOT READ OUT: Neither of these	3	

G3 **And can I just check, in what form would you like to receive the £40 payment that we'd like to offer as a thank you for your time today?**

PayPal Transfer	1	TAKE PAYPAL EMAIL ADDRESS
Wise Transfer Vouchers	2	TAKE EMAIL ADDRESS
Charity donation	3	TAKE PREFERRED CHARITY FROM: <ul style="list-style-type: none"> • Great Ormond Street Hospital • British Heart Foundation • Macmillan Cancer support • Shelter • Celia Hammond Animal Trust • Mind • Centrepoint

THANK RESPONDENT AND CLOSE INTERVIEW

“IFF Research illuminates the world for organisations businesses and individuals helping them to make better-informed decisions.”

Our Values:

1. Being human first:

Whether employer or employee, client or collaborator, we are all humans first and foremost. Recognising this essential humanity is central to how we conduct our business, and how we lead our lives. We respect and accommodate each individual’s way of thinking, working and communicating, mindful of the fact that each has their own story and means of telling it.

2. Impartiality and independence:

IFF is a research-led organisation which believes in letting the evidence do the talking. We don’t undertake projects with a preconception of what “the answer” is, and we don’t hide from the truths that research reveals. We are independent, in the research we conduct, of political flavour or dogma. We are open-minded, imaginative and intellectually rigorous.

3. Making a difference:

At IFF, we want to make a difference to the clients we work with, and we work with clients who share our ambition for positive change. We expect all IFF staff to take personal responsibility for everything they do at work, which should always be the best they can deliver.



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