UK Government

RAF022/2526 Communicating the rollout of smart-contingent contracts (and associated policy changes) to non-domestic customers

Research findings technical annex

Produced by Verian as part of a research project

Department for Energy Security and Net Zero (2026)

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Methodology

Approach

Verian conducted seven 90-minute focus groups and three 60-minute interviews with representatives of businesses and public sector organisations who, at the time of research, did not have smart meters installed at any or all of their sites. It was planned that all participants would take part in focus groups but, due to availability, interviews were carried out with three participants to ensure they could be included in the research.

All focus groups and interviews were conducted online via Zoom. Fieldwork was conducted in December 2025 and January 2026, during the consultation period for the policy change.

Groups and interviews were structured around reviewing hypothetical example communications from an energy supplier by email or letter, developed by DESNZ. These communications provided an overview of the proposed policy changes, the rationale for them, and the implications for customers. Participants were asked to give feedback on the content of the draft communications. The full topic guide and stimulus shown to participants is included below.

Analysis approach

A thematic framework was developed, based on the overarching research questions and the sections of the topic guide. Following each focus group or interview, Verian researchers inputted qualitative data into this framework from the notes taken by each moderator during and after each session and from session recordings.

These data were organised into the framework and evidenced with verbatim quotes from participants. Researchers then reviewed the data in this framework, cross-referencing the findings across the participant groups. This process highlighted commonalities and variations between groups. Alongside reviewing the analysis framework, researchers took part in analysis discussions with other members of the research team to discuss patterns and interpret these in light of the research questions.

Note on interpreting the findings

This research is qualitative in nature. While the sample size reflects this, it was designed to be broadly representative of non-domestic organisations without smart meters, and to capture a range and depth of participant perspectives. As the proposed smart contingent policy package had not been introduced at the time of the research, participants were asked to imagine that they received stimulus materials in the form of email or letter communications (provided through the research) from their energy supplier.

Sample and recruitment

Verian recruited a sample of 43 participants. Participants were recruited via free-find recruitment methods by Verian subcontractor Roots Research, drawing on their existing database and through directly targeting new potential participants who met the sample criteria. Verian and DESNZ developed a screening questionnaire to ensure participants met the required sample specifications.

The sample was structured to include a mix of organisation types, size, tenure, energy contract arrangements and attitudes to smart meters that reflected the known distribution of current attitudes toward smart meters amongst non-domestic consumers:

- **Attitude to smart meters:** Those indifferent to or accepting of smart meters, and those who would reject smart meters (see definition used below)
- **Size and type of organisation:** Microbusinesses (1-9 employees and a turnover under £2million), SMEs (10-249 employees), and public sector organisations
- **Tenure type and energy contract arrangement:** Organisations which owned their own premises, those renting premises where the landlord holds the energy contract, and those renting premises where the tenant holds the energy contract
- **Use of third-party intermediaries:** Organisations holding a contract with the energy supplier directly, and organisations whose energy contract is handled by a third-party intermediary
- **Part-smart organisations:** One group of part-smart organisations with multiple sites, with smart meters currently installed in some but not all of them

Eight segments of interest were identified. The table below shows the number of participants included against each of the segments.

Table 1: Number of participants in each segment[1]

Segment	Core quotas	Number of participants
1. Microbusiness and SMEs	Accepters / indifferent Own premises	8

[1] To protect participant confidentiality, cells with a count of fewer than 3 have been suppressed and combined with adjacent categories. This aggregation is applied to ensure individuals cannot be identified within small subgroups.

2. Microbusiness and SMEs	Accepters / indifferent Rent premises Landlord / Tenant holds energy contract	7
3. Public sector organisations	Accepters / indifferent	6
4. Microbusiness and SMEs	Rejectors Own premises	8
5. Microbusiness and SMEs	Rejectors Rent premises Landlord holds energy contract	3
6. Microbusiness and SMEs	Rejectors Rent premises Tenant holds energy contract	4
7. Part-smart organisations	Mix of acceptors / indifferent and rejectors	7
Total		**43**

Alongside the core quotas that allowed participants to be allocated to a segment, there were some secondary quotas in place for: large and small energy suppliers; region; sector; awareness of smart meters for non-domestic properties; and use of a third-party intermediary. The achieved number of participants against these criteria are set out below.

Table 2: Quotas achieved across sample by size of energy supplier

Size of energy supplier	Number of participants
Large suppliers[2]	36
Small suppliers	7

[2] A large energy supplier is defined in DESNZ's Quarterly Smart Meter Statistics reporting as any of: British Gas; E.ON Next; EDF Energy; Octopus Energy; Scottish Power; SSE Energy Solutions; Utilita; or Utility Warehouse (only non-domestic suppliers stated). Any other supplier is considered a small supplier for these purposes.

Table 3: Quotas achieved across sample for region

Region	Number of participants
North East & Yorkshire and the Humber	7
North West	6
East Midlands & East of England	4
London	10
South East	5
South West, West Midlands & Wales	6
Scotland	5

Table 4: Quotas achieved across sample for other characteristics of interest

Characteristic	Number of participants
Unaware smart meters were available for non-domestic properties	9
Using a third-party intermediary	10
Hospitality (accommodation and food services) organisation	4
Retail organisation	3
Schools	6

Topic Guides

Two topic guides were created. Topic guide A covered sample segments 1, 3, 4, 5, 7 and 8 (see sample segments in Table 1 above). Topic guide B covered sample segments 2 and 6 and was tailored to tenants whose landlords hold the energy contract.

Topic guide A

1. Introductions (5 minutes)

Introduce research, reassure about confidentiality, and set tone of discussion.

2. Smart meter attitudes (10 minutes)

Understand participants past / current experience with smart meters and reasons for not adopting

Understand any perceived benefits / disbenefits and initial questions and uncertainties about smart meters (could inform framing / content of messaging)

3. Initial reactions to core messaging (15/20 minutes)

Gather reactions to core message about what is happening, including understanding comprehension, worries and questions

STIM B: Letter overview

STIM C1: Core message part 1 ‘What is happening’

Initial reactions:

- What are their initial reactions to how this information has been communicated?
- What stands out to them?
- Any lines they immediately like / dislike?

Comprehension:

- To what extent they understand what it is saying
- Any phrases / language they don’t understand
- What is their assumption about the sequencing of entering the contract versus having the smart meter installation under the policy proposals?

Tone & level of detail:

- What do they think about the way this message is being communicated?
- What do they think about the tone of this?
- How do they feel about the level of detail here?
- How do they feel about the length of this section?

Specific language probes:

Importance	Message Text	Probe
Priority	"This includes businesses with multiple meter points; every meter point should be upgraded to a smart meter or advanced meter"	Prompt on comments on word 'upgrade' What do participants think about the 'upgrade' language (i.e. is it motivating)
Priority	"…dependent on switching to smart or advanced meters."	Prompt on whether participants understand this phrase. Even if they don't know what an advanced meter is, do they understand what is changing as part of the policy proposals?
Priority	"Your meter(s) will be exchanged at no additional cost and at a time that's convenient for you."	Listen out for whether participants react to this phrasing (i.e. question if remedial work is covered)
Priority	"…will need to agree to switch to smart meter(s)"	Prompt on what participants understand by this
If time	"If your energy contract is with an intermediary…"	Prompt on whether they feel this is information that needs to be told up front, or if it could be dealt with in an FAQ?
If time	"Small businesses…"	Listen out for if participants have a positive or negative reaction to the scope Prompt on whether participants would prefer to be addressed differently, e.g. 'small businesses and public sector businesses'

STIM C2: Core message part 2 'What do you need to do?'

“Now let’s look at the second paragraph”

Ask questions on initial reaction, comprehension, tone & level of detail as above.

Specific probes:

Importance	Message Text	Probe
Priority	“You don’t need to do anything until your energy contract comes up for renewal”	How do participants react to this line. Is it likely to make them disregard the rest of the message?
Priority	“They will arrange an installation appointment with you within three months of your new contract starting”	How useful is this information to them? Should this information come earlier in the text?
Priority	“If you have four or more sites that require upgrading, your supplier will work with you on an installation plan within three months of your new contract starting.”	Do participants understand this? Does it cause confusion? Are they happy for this to be included even if it’s not relevant to them specifically?
If time	“However, if you want, you can request a smart/advanced meter installation before your contract ends: you don’t have to wait”	How do people respond to this?

4. Framings (10/25 minutes)

Gather reactions to each message framing – exploring comprehension, emotional reaction, messengers and to what extent each leads to a feeling of acceptance

GROUP 1, 4, 5, 8 - Exploring each framing and overall comparison

GROUP 3, 7 – Explore most popular framing from previous groups only

STIM D1-3 – framings (rotate order across groups)

Initial reactions:

- What are their initial reactions to how this information has been communicated?
- What stands out to them?

- Any lines they immediately like / dislike?

Comprehension:

- To what extent they understand what it is saying
- Any phrases / language they don't understand
- How does this text make them feel about the policy?

Tone & level of detail:

- What do they think about the way this message is being communicated?
- What do they think about the tone of this?
- How do they feel about the level of detail here?

Suggested improvements

- Suggested improvements

Repeat for each framing

Questions for each framing:

Framing	**Probes**
Consumer protection	Explore 'protections for small businesses' – who and what do they think they're being protected from? Listen for any confusion around 'smart-contingent contract terms' – is this easily understood, any preferred alternative phrases? Is the consumer protection code well understood? Do participants think this information is valuable to include in comms? Are any of the three points in the code more/less persuasive?

Standardisation	Explore reference to 'Great Britain's infrastructure' – is this phrase motivating / appealing / disliked, why? Explore thoughts on the high-speed internet analogy – likes/dislikes, why? Explore thoughts on supportive tone/acknowledgement of hassle: "We understand that accepting a smart meter appointment is an additional action to take … we will minimise any inconvenience and guide you through the process." Explore thoughts on the 'thank you' sentence Explore thoughts on "making this transition smooth and efficient" – is it understood how this policy is making the transition efficient? Is efficient completion of rollout seen positively?
Benefits	Get a sense of how 'wider benefits' (to suppliers and grid) land in comparison to 'business benefits' – is this transparency appreciated or received badly? Listen for / any confusion around the 'we' behind this message – expect / want to see and hear this from Government, their supplier, someone else? Explore thoughts on the link between smart meters enabling a more resilient energy grid which means less dependence on fossil fuels from other countries – how is this understood and how is this received?

Overall comparison

STIM D4 – Framings comparison

- Overall, which framing resonates with them most and why
- Which makes them feel most accepting of the policy
- Are there different elements of each that appeal – what would be their ideal combination

6. Additional information and messengers (10 minutes)

Understand what other information they would want to see, and relative importance, and who would expect this to come from

Additional questions

What other questions do they still have about this potential policy

- Why are these questions important for them
- Where would they expect to see this information
- Who would they expect to supply this information

Messengers

- How would they feel about these communications coming from their energy supplier?
- Does any of the information we've seen feel more appropriate to come from someone else? If so, explore what & why
- Aside from energy supplier, whether there are any other organisations / messengers they would expect to hear about this policy change from
- Explore spontaneous thoughts, then prompt with:
    - Government
    - What do they think of the level of detail if this came from Gov vs their supplier
    - What would they expect or want to hear from Gov on this / anything different?
    - Brokers
    - Landlord
    - Independent body
    - Any differences in the type of information they would expect different organisations to give

Overall length:

IF TIME: show stimulus B1 on screen again

- Now that we've seen what would be in a letter like this, how do they feel about the length of this?
- Would they read all of this?
- If not, at what point would they disengage?

7. Letters for commercial tenants (20 minutes)

Explore what participants think of the wording of the letters and how they would feel about sending / receiving them

Show stimulus G1, G2: Letters for commercial tenants. Show G1 first in group 3, G2 first in group 7.

Initial reactions:

- What are their initial reactions to this text?
- To what extent they understand what it is saying
- How they feel about the tone
- What would make them more likely to use it

Suggested improvements

- Listen spontaneously first, then prompt: any important messages we've covered elsewhere which should be in the letters?

Stimulus	Message Text	Probe
G1	Third paragraph – DESNZ statement: "To this effect, the Department for Energy Security and Net Zero considers that, in most instances…	Do participants find this easy to understand? What do participants think this is saying? What parts, if any, are confusing? What do participants think "acting unreasonably" means? What questions do participants have after reading this statement?
	"Please contact your energy supplier to arrange for smart meters to be installed in the premises"	How do participants expect they would respond to this? Would they contact their supplier to arrange installation, and if not, why not?
	General	What other information would participants expect to receive about this in a letter from their landlord?

G2	Third paragraph – DESNZ statement: “To this effect, the Department for Energy Security and Net Zero considers that, in most instances…	Do participants find this easy to understand? What do participants think this is saying? What parts, if any, are confusing? What do participants think “acting unreasonably” means? What questions do participants have after reading this statement? Does this statement make participants feel more empowered to request a smart meter installation?
	General	What other information would participants expect to include in a letter to their landlord?
G3	“This means [organisation] will need to install smart meters to ensure we can secure the best energy rates and avoid unnecessary cost increases for the premises.”	How do participants feel about this language: are cost savings for their landlord a motivating reason to accept the installation? What other reasons would participants expect to be included?
	“We would be grateful if you can arrange for someone to grant access to the premises at a time convenient to you.”	What do participants think about this tone? Might they expect to see more/less acknowledgement of potential inconvenience? What other information would participants expect to receive about this in a letter from their landlord?

8. Close (5 minutes)

Capture final thoughts and end the session

- Any final thoughts

- Anything important / relevant we haven't covered?

Thanks and close

Topic Guide B

1. Introductions (5 minutes)

Introduce research, reassure about confidentiality, and set tone of discussion.

Warm up and introduction

2. Smart meter attitudes (15 minutes)

Understand participants past / current experience with smart meters and reasons for not adopting

Understand any perceived benefits / disbenefits and initial questions and uncertainties about smart meters (could inform framing / content of messaging)

3. Letter from landlord (25 minutes)

Explore what participants think of the wording of the letters and how they would feel about sending / receiving them

Show stimulus G3: Letter from landlords to tenants.

Initial reactions:

- What are their initial reactions to this text?
- What jumps out first?
- To what extent they understand what it is saying
- How they feel about the tone
- How they would feel receiving a letter like this

Suggested improvements

- Explore spontaneous suggestions first, then prompt: any other information they think it would be helpful for the letter to include

Specific probes

Stimulus	Message Text	Probe
G3	"This means [organisation] will need to install smart meters to ensure we can secure the best energy rates and avoid unnecessary cost increases for the premises."	How do participants feel about this language: do they read into this as saving money for their landlord (lower energy rates) or saving money themselves (by avoiding unnecessary cost increases for premises)? What other reasons would participants expect to be included?
	"We would be grateful if you can arrange for someone to grant access to the premises at a time convenient to you."	What do participants think about this tone? Might they expect to see more/less acknowledgement of inconvenience being brought about by their landlord?
	"You can request an appointment outside of business hours to minimise disruption"	How do participants feel about requesting an out-of-hours appointment? (I.e. is this helpful to mention, or is there any scepticism regarding feasibility) Does the mention of potential 'disruption' make them think that this request will be difficult?
	"[Our energy supplier] will contact you shortly to schedule the installation/s."	Listen out for (but don't probe specifically) any concerns about energy supplier contacting them

4. Framings (25 minutes)

Gather reactions to each message framing – exploring comprehension, emotional reaction, messengers and to what extent each leads to a feeling of acceptance

STIM D1-3 – framings (rotate order across groups)

Initial reactions:

- What are their initial reactions to how this information has been communicated?
- What stands out to them?
- Any lines they immediately like / dislike?

Comprehension:

- To what extent they understand what it is saying
- Any phrases / language they don't understand
- How does this text make them feel about the policy?

Tone & level of detail:

- What do they think about the way this message is being communicated?
- What do they think about the tone of this? (Explore – does the tone feel expected, appropriate for this kind of message?)
- How do they feel about the level of detail here?

Suggested improvements

- Suggested improvements

Repeat for each framing

Questions for each framing:

Consumer protection	Explore ‘protections for small businesses’ – who and what do they think they’re being protected from? Listen for any confusion around ‘smart-contingent contract terms’ – is this easily understood, any preferred alternative phrases? Is the consumer protection code well understood? Do participants think this information is valuable to include in comms? Are any of the three points in the code more/less persuasive?
Standardisation	Explore reference to ‘Great Britain’s infrastructure’ – is this phrase motivating / appealing / disliked, why? Explore thoughts on the high-speed internet analogy – likes/dislikes, why? Explore thoughts on supportive tone/acknowledgement of hassle: “We understand that accepting a smart meter appointment is an additional action to take … we will minimise any inconvenience and guide you through the process.” Explore thoughts on the ‘thank you’ sentence Explore thoughts on “making this transition smooth and efficient” – is it understood how this policy is making the transition efficient? Do businesses want to see Gov complete the rollout efficiently?
Benefits	Get a sense of how ‘wider benefits’ (to suppliers and grid) land in comparison to ‘business benefits’ – is this transparency appreciated or received negatively? Listen for / any confusion around the ‘we’ behind this message – expect / want to see and hear this from government, their supplier, someone else? Explore thoughts on the link between smart meters enabling a more resilient energy grid which means less dependence on fossil fuels from other countries – how is this understood and how is this received?

Overall comparison

STIM D4 – Framings comparison

- Overall, which framing resonates with them most and why
- Which makes them feel most accepting of the policy proposals
- Are there different elements of each that appeal – what would be their ideal combination
- To what extent they would expect this information to be in the letter from their landlord

5. Additional information and messengers (15 minutes)

Understand what other information they would want to see, and relative importance, and who would expect this to come from

Additional questions

- What other questions do they still have about this potential policy
- Look out for questions around the FAQ areas:
- Why are these questions important for them
- Where would they expect to see this information
- Who would they expect to supply this information

Messengers

- Aside from their landlord, whether there are any other organisations / messengers they would expect to hear about this potential policy change from
- Explore spontaneous thoughts, then prompt with:
    - Government
    - Their landlord's energy supplier
    - Independent body
- Any differences in the type of information they would expect different organisations to give

8. Close (5 minutes)

Capture final thoughts and end the session

- Any final thoughts
- Anything important / relevant we haven't covered?

Thanks and close

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