

SSEN ED3 Acceptability Testing

Executive summary

Prepared by Dawn Mulvey and Michael Brainch

November 2026

Scottish & Southern Electricity Networks

create clarity



01 Summary and key takeaways



In summary:

BROAD SUPPORT Once informed about the plan, 73% of customers found it acceptable and 76% found it affordable, with business customers the most positive.

INFORMATION Seeing the business plan commitments in more detail raised acceptability by around 10 percentage points among domestic, business and digitally disengaged customers.

COMMITMENTS Commitments were viewed positively or neutrally and were mostly easy to understand; digitally disengaged customers found them hardest.

AMBITION Around two-thirds felt the level of ambition was about right. Some felt it was too high for building the workforce of the future and too low for creating jobs.

VALUE Value for money (59%) and reasonableness (63%) scores are lower, so communications should stress the plan's benefits.

SSEN with Create Clarity

Dawn Mulvey and Michael Brainch

Summary and key takeaways

Broad support for the business plan from domestic and business customers

Overall, 73% of customers (72% domestic / **80%** business) found the business plan **acceptable** (informed views, after being shown plan information).

75% of domestic and **76%** of business customers found the business plan **affordable (76% overall).**

Additional measures:	Total	Domestic	Business
Value for money	59%	58%	66%
Reasonable	63%	62%	68%

Communications should emphasise the benefits of the plan to reinforce perceived value.

KPI scores increased with more knowledge about the plan

Perceptions improved after customers received additional information about the business plan and three commitment areas.

Acceptability shows the greatest increase (**+10 percentage points** domestic; **+11 percentage points** business), suggesting that greater understanding of the commitments strengthens support and validates SSEN's focus on customer priorities.

Affordability, value for money and reasonableness scores also improve for domestic customers, albeit to a lesser extent. For business customers, affordability and value for money slightly increase, though reasonableness slightly decreases.

General support for commitments, though some are looking for more ambition

Commitment areas were positively received, particularly among business customers, who also found them easiest to understand. Digitally disengaged customers found them less easy to understand.

Around 60-70% felt the level of ambition was about right. Key areas where ambition was questioned:

Domestic customers: too ambitious on building the workforce of the future; not ambitious enough on creating jobs.
Business customers: too ambitious on making better use of the network; not ambitious enough on modernising the network.

Difference in key measures before and after seeing three commitment areas

By sample

After seeing three of the seven commitment areas (randomised), acceptability went up consistently, and reasonableness went up most for digitally disengaged customers.

	pp = percentage points	Domestic	Business	Digitally Disengaged
	Sample size	*900*	*104*	*102*
KPIs	**Acceptable** (T2B excl DK)	**+ 10pp**	**+ 11pp**	**+ 10pp**
KPIs	**Affordable** (T2B)	**+ 5pp**	**+ 6pp**	**+ 7pp**
Additional measures	**Good value** (T2B excl DK)	**+ 3pp**	**+ 4pp**	**+ 7pp**
Additional measures	**Reasonable** (T2B excl DK)	**+ 1pp**	**- 3pp**	**+ 12pp**

Significant difference

KPIs pre and post viewing three commitment areas

At a total level, all KPI scores increased after seeing the commitment areas, with **acceptability** having the most marked increase for the total sample (an increase of ten percentage points).

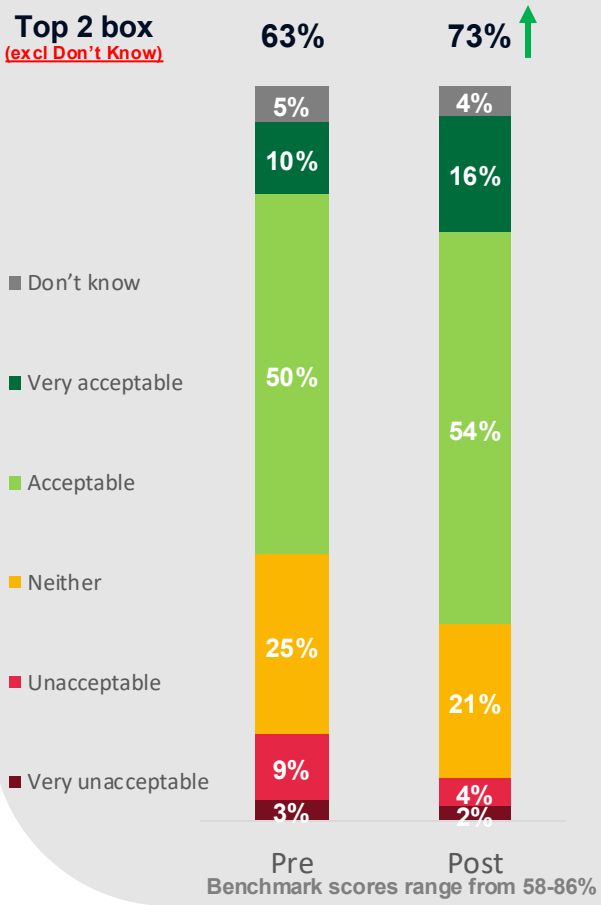
Total sample

Significantly higher

Significantly lower

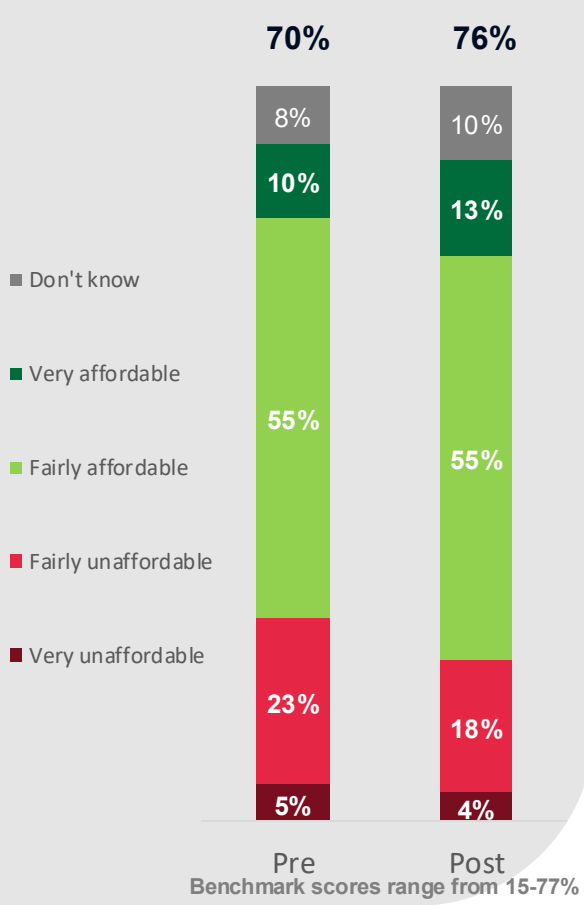
KPIs

Acceptability



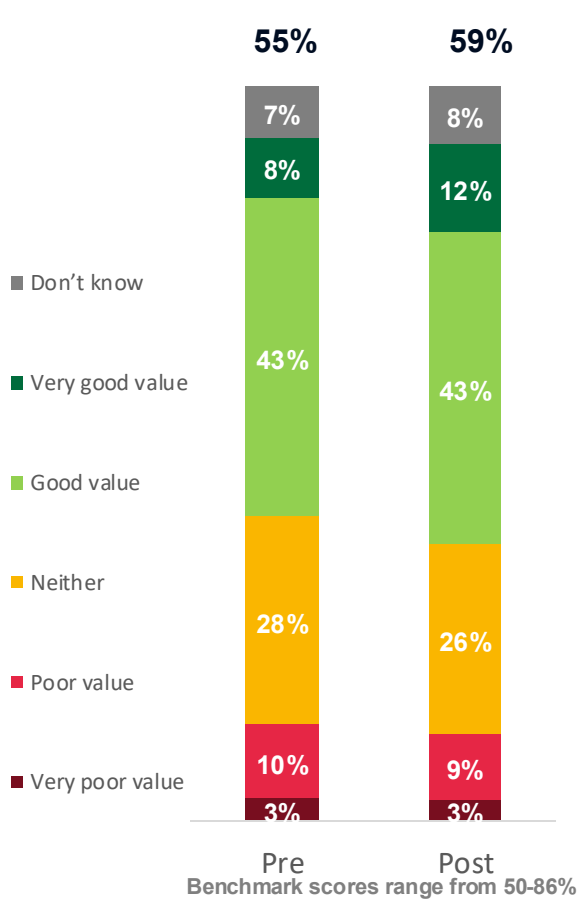
Benchmark scores range from 58-86%

Affordability



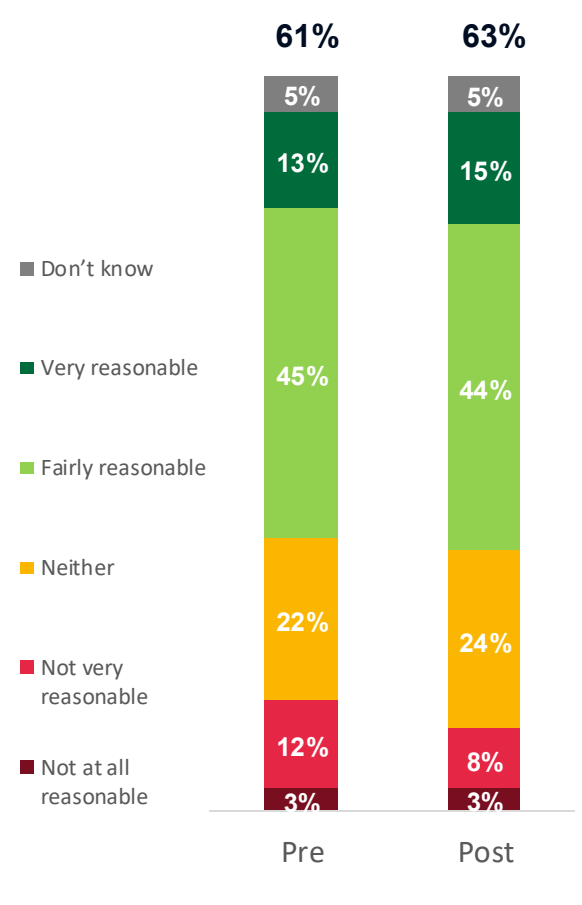
Benchmark scores range from 15-77%

Value for money



Benchmark scores range from 50-86%

Reasonableness



Base: Total sample = 1106.

Benchmarks: business plan acceptance testing from other price controls, including RIIO-ED2, RIIO-GD3 and Ofwat's PR24.

Note: Affordability *uses a 4-point scale with no neutral mid-point and should not be compared directly to the other KPIs. Top 2 box measures have been rebased to exclude Don't Knows, so reflect the proportion who gave an opinion.*

KPIs pre and post viewing three commitment areas

For the domestic sample, all KPI scores were directionally higher after respondents viewed details of three commitments. **Acceptability** showed the largest and statistically significant increase (+10 percentage points), while affordability (+5pp), value for money (+3pp) and reasonableness (+1pp) showed smaller increases.

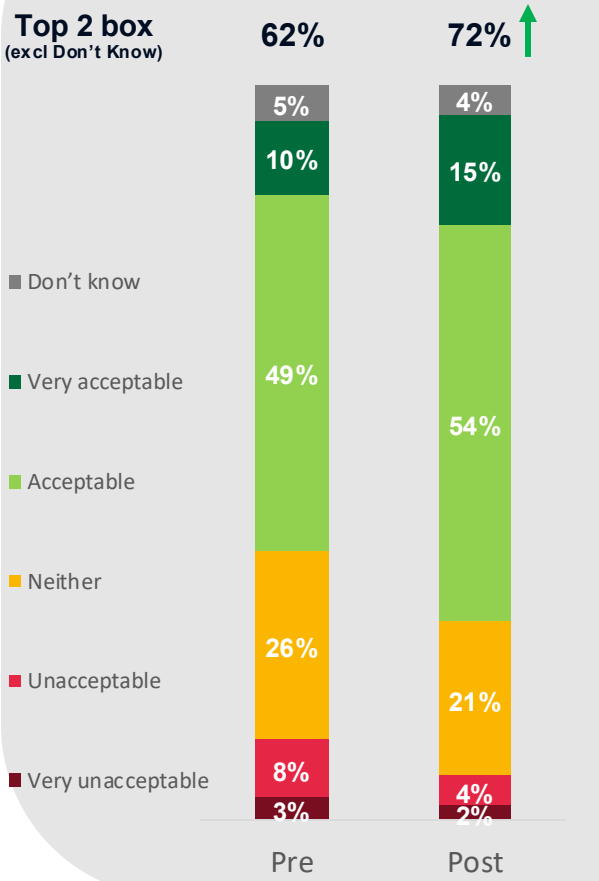
Domestic

Significantly higher

Significantly lower

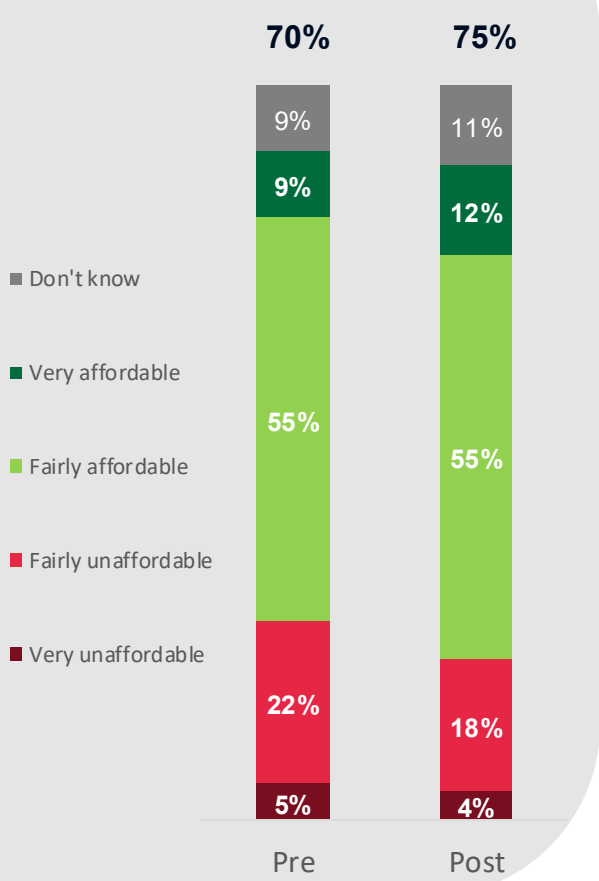
KPIs

Acceptability



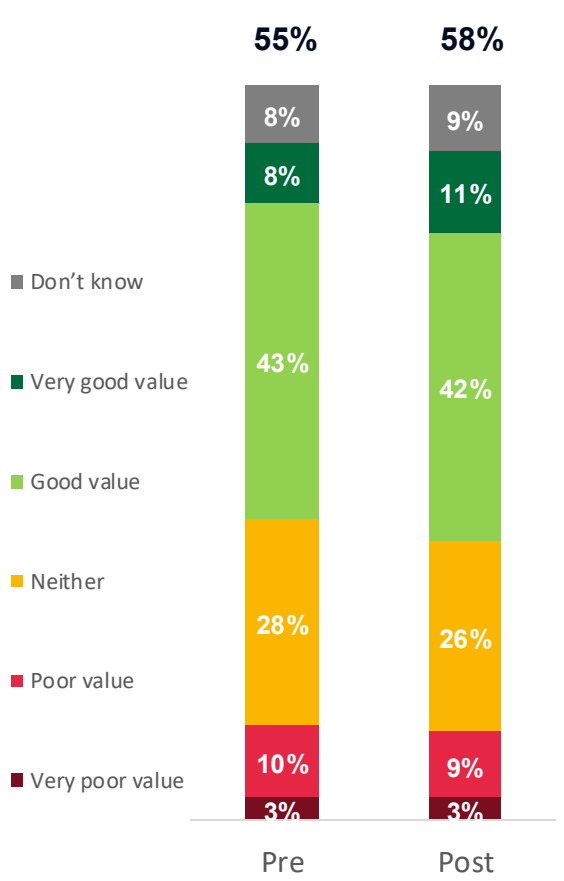
Benchmark scores range from 58-86%

Affordability



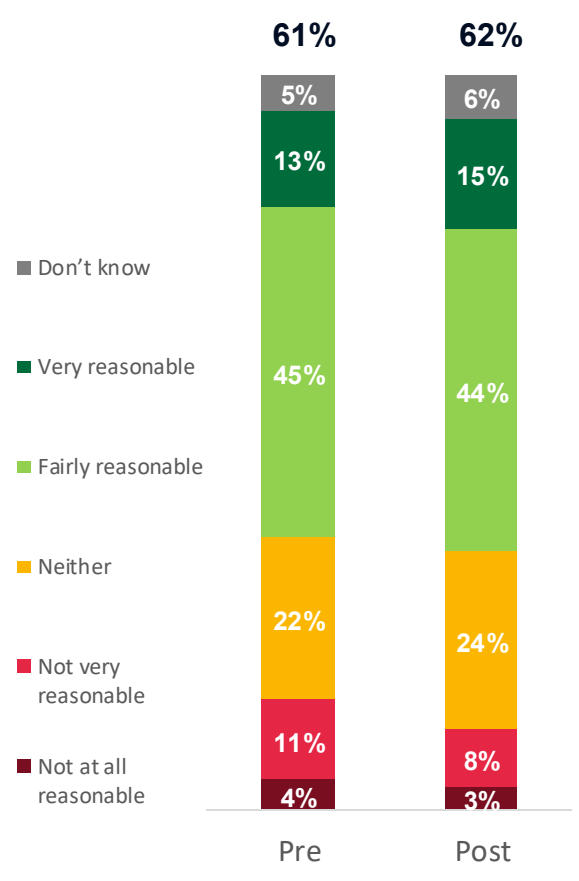
Benchmark scores range from 15-77%

Value for money



Benchmark scores range from 50-86%

Reasonableness



Base: Total domestic sample = 900.

Benchmarks: business plan acceptance testing from other price controls, including RIIO-ED2, RIIO-GD3 and Ofwat's PR24.

Note: Affordability *uses a 4-point scale with no neutral mid-point and should not be compared directly to the other KPIs. Top 2 box measures have been rebased to exclude Don't Knows, so reflect the proportion who gave an opinion.*

KPIs pre and post viewing three commitment areas

For business customers, **acceptability** saw an increase of 11 percentage points and **affordability** an increase of 6 percentage points. All measures are higher for business customers than for domestic customers, except affordability before seeing the commitments, which is on a par.

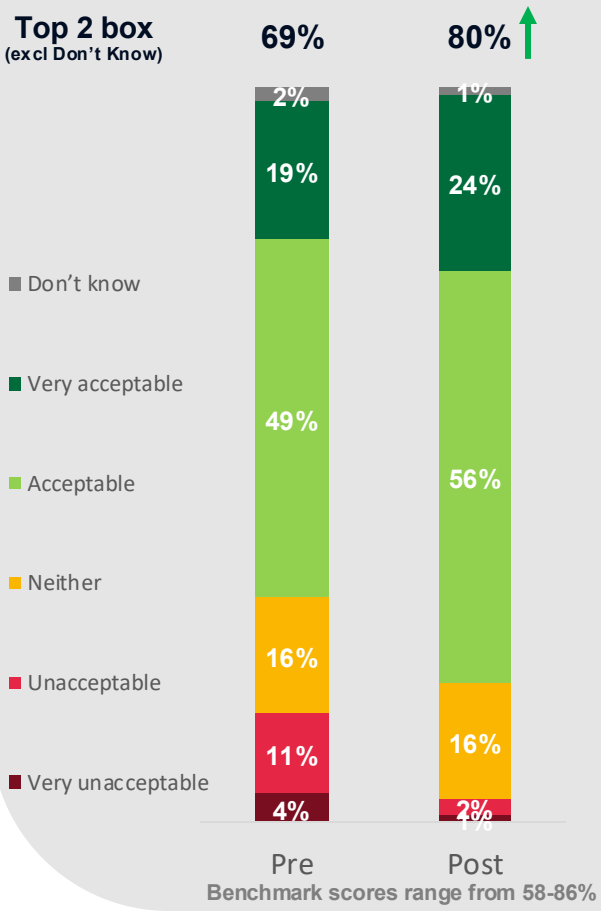
Business

Significantly higher

Significantly lower

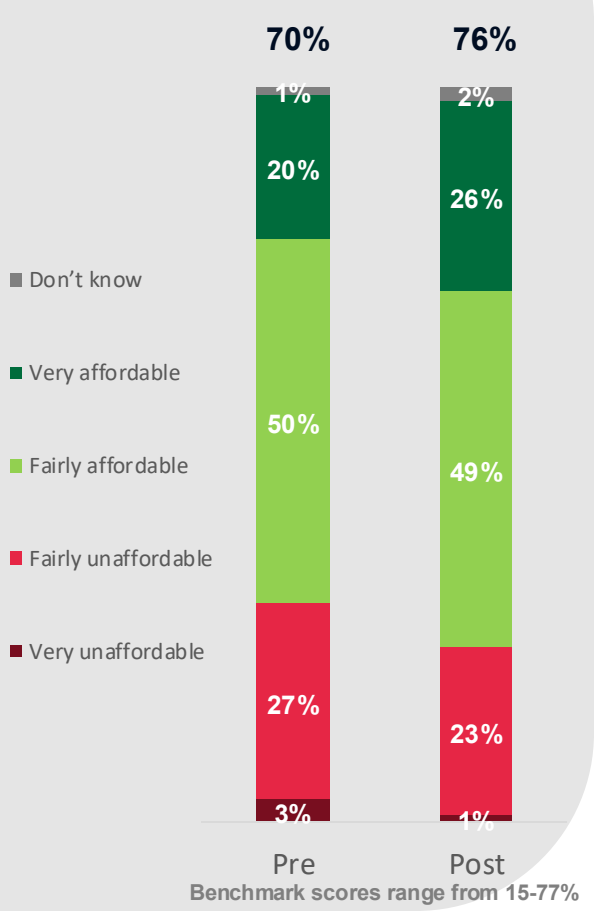
KPIs

Acceptability



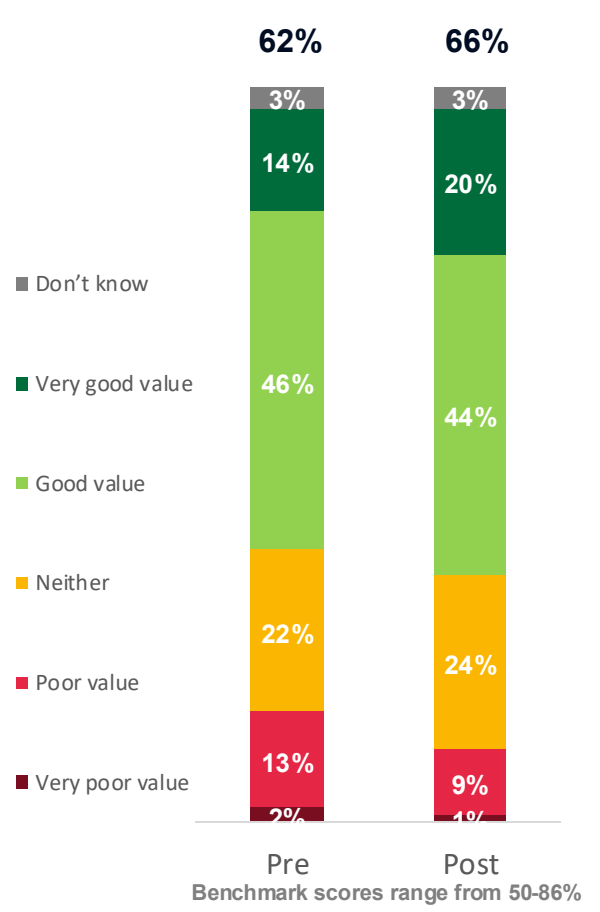
Benchmark scores range from 58-86%

Affordability



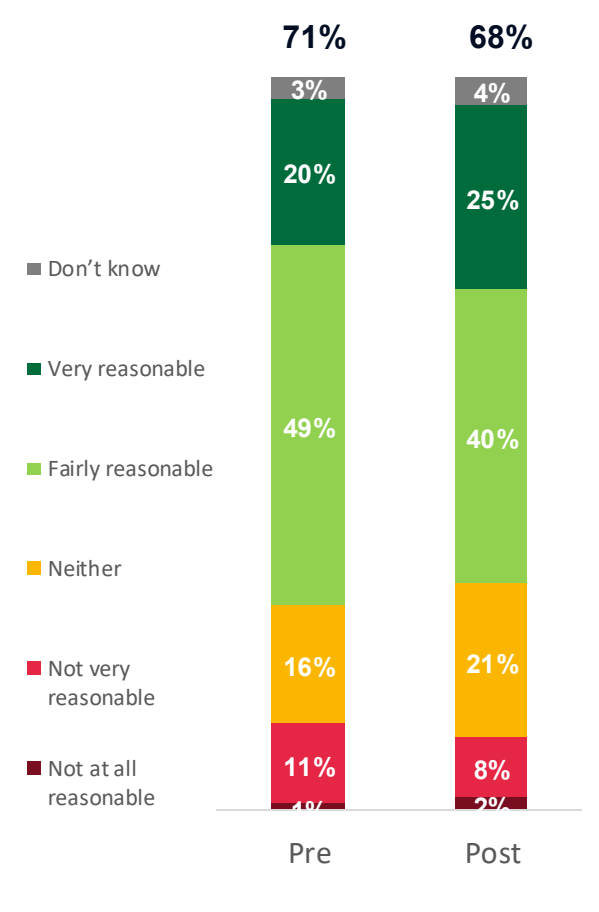
Benchmark scores range from 15-77%

Value for money



Benchmark scores range from 50-86%

Reasonableness



Base: Total business sample = 104.

Benchmarks: business plan acceptance testing from other price controls, including RIIO-ED2, RIIO-GD3 and Ofwat's PR24.

Note: Affordability *uses a 4-point scale with no neutral mid-point and should not be compared directly to the other KPIs. Top 2 box measures have been rebased to exclude Don't Knows, so reflect the proportion who gave an opinion.*

KPIs pre and post viewing three commitment areas

Digitally disengaged customers have lower scores than domestic and business customers for acceptability and value for money. However, scores increased across the board after viewing the commitment areas, with **acceptability** and **reasonableness** having the largest increases of ten and twelve percentage points respectively.

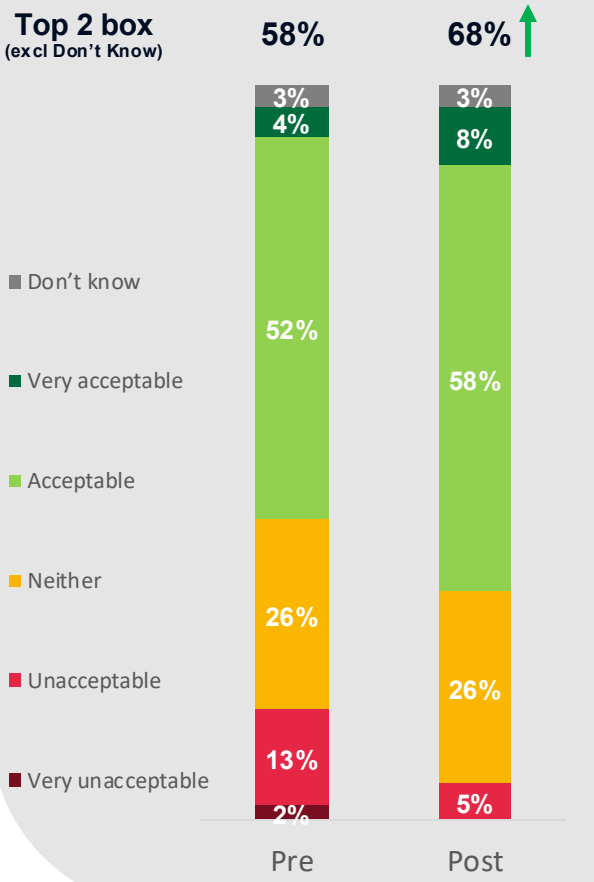
Digitally disengaged

Significantly higher

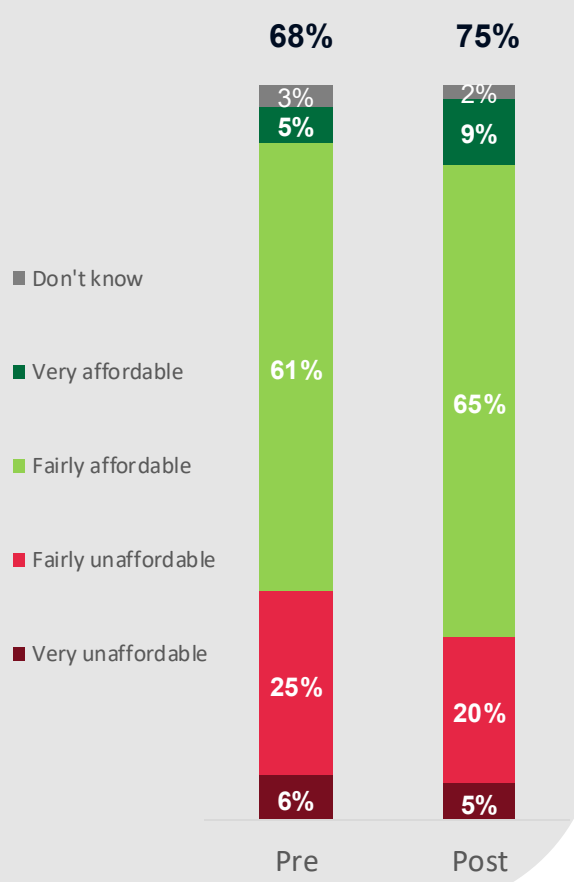
Significantly lower

KPIs

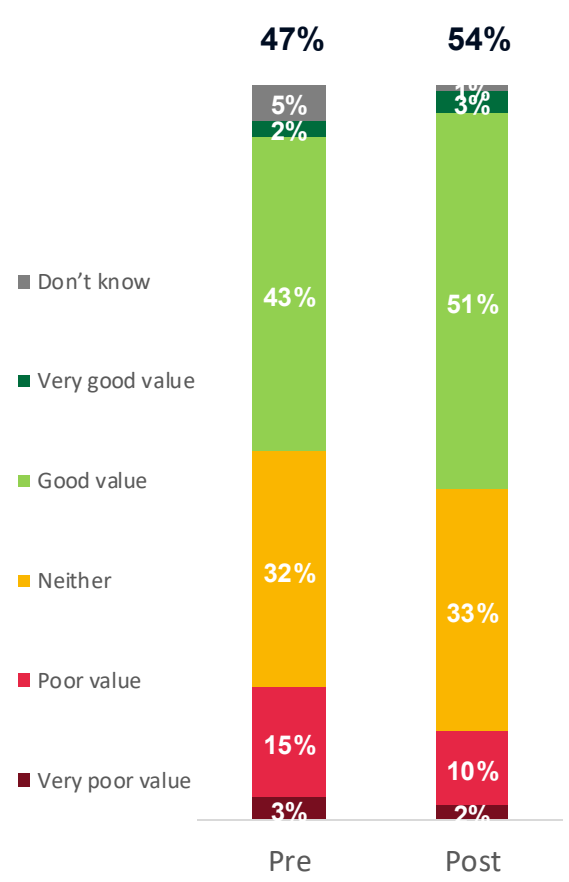
Acceptability



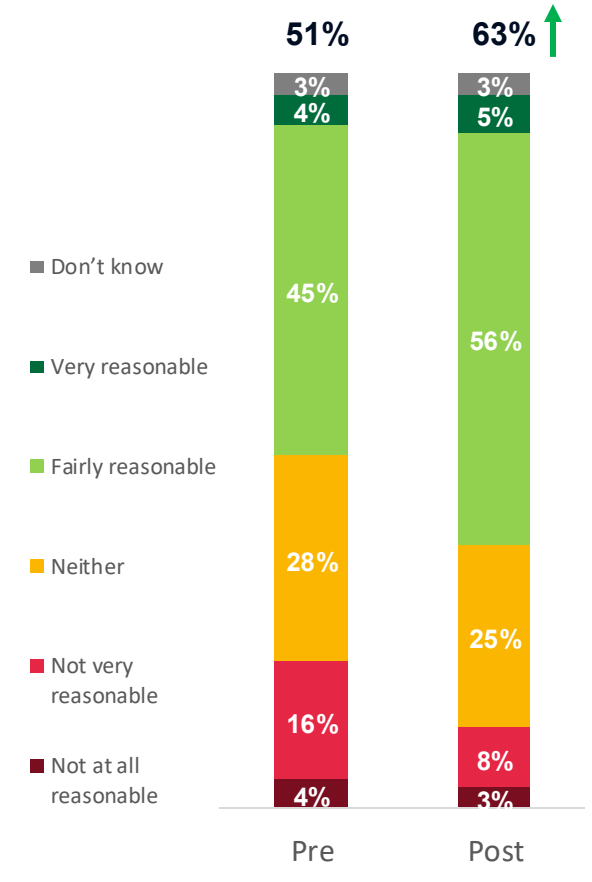
Affordability



Value for money



Reasonableness



Base: Total digitally disengaged sample = 102
Benchmarks not available for this audience

Note: Affordability *uses a 4-point scale with no neutral mid-point and should not be compared directly to the other KPIs. Top 2 box measures have been rebased to exclude Don't Knows, so reflect the proportion who gave an opinion.*

Overview of scores for the seven commitments – total sample

Customers are generally positive or neutral and find the commitments easy to understand. Ambition is seen as slightly too high for ‘build the workforce of the future’ and too low for ‘create jobs’.

Total sample

		Modernise our network and increase climate resilience	Targeted action to reduce power cuts	Prepare for growing demand	Make better use of the network	Create jobs and support local growth	Build the workforce of the future	Support customers when they need us most
	Sample size:	*472*	*474*	*477*	*476*	*472*	*472*	*475*
How they feel about what SSEN is proposing	Positive (T2B)	58%	63%	60%	57%	56%	55%	61%
	Negative (B2B)	6%	5%	6%	4% ↓	9% ↑	12% ↑	7%
	Neutral	36%	32%	34%	39%	36%	33%	32%
Ease of understanding	Easy (T2B)	69%	71%	70%	66%	72%	75%	68%
	Difficult (B2B)	6%	5%	5%	6%	5%	6%	7%
	Part easy, part difficult	25%	24%	26%	28%	23%	20%	25%
Scale of ambition	Ambition about right*	68%	69%	73%	69%	63%	62%	69%
	Ambition too high (T2B)*	17%	17%	18%	18%	17%	26% ↑	21%
	Ambition too low (B2B)*	15%	14%	9% ↓	13%	20% ↑	13%	11% ↓

*Note: this question also included a ‘Don’t Know’ option; ‘Don’t Know’ answers are excluded from calculations

↑ Significantly higher than the average

↓ Significantly lower than the average

Each participant viewed a randomised selection of three commitments; hence base sizes vary.
Q17a Thinking specifically about this investment area, overall how do you feel about what SSEN is proposing for the period 2028-2033? Q17c. How easy was this information to understand? Q18. Thinking about this investment commitment you have just seen, including what it would mean for your electricity bill, how would you describe its level of ambition?

Overview of scores for the seven commitments

Figures differ by sample type. Business customers feel the most positive about the commitment areas. They also find them easiest to understand, whilst digitally disengaged customers find them most difficult to understand. Digitally disengaged customers are more likely to feel ambition is about right.

By sample

		Modernise our network and increase climate resilience	Targeted action to reduce power cuts	Prepare for growing demand	Make better use of the network	Create jobs and support local growth	Build the workforce of the future	Support customers when they need us most
Circa 380 Online Domestic	Positive (T2B)	57%	63%	60%	55%	55%	53%	59%
	Easy to understand (T2B)	69%	72%	70%	65%	72%	75%	69%
	Ambition about right*	68%	70%	75%	71%	62%	61%	71%
Circa 40 Business	Positive (T2B)	63%	68%	57%	69%	66%	73%	76%
	Easy to understand (T2B)	80%	73%	78%	79%	83%	80%	70%
	Ambition about right*	61%	61%	56%	48%	61%	59%	48%
Circa 40 Digitally Disengaged	Positive (T2B)	63%	58%	59%	67% ↑	46% ↓	48% ↓	57%
	Easy to understand (T2B)	46%	40%	46%	48%	32% ↓	48%	36%
	Ambition about right*	82%	68%	77%	80%	89%	69%	74%

***Note: this question also included a 'Don't Know' option; 'Don't Know' answers are excluded from calculations**

↑ Significantly higher than the average

↓ Significantly lower than the average

Each participant viewed a randomised selection of three commitments; hence base sizes vary.
Q17a Thinking specifically about this investment area, overall how do you feel about what SSEN is proposing for the period 2028-2033? Q17c. How easy was this information to understand? Q18. Thinking about this investment commitment you have just seen, including what it would mean for your electricity bill, how would you describe its level of ambition?

Importance of challenges faced by the energy sector

Addressing climate change challenges is considered most important by all customers (although less so for digitally disengaged). Adapting to new technology matters more to domestic and digitally disengaged customers than to business customers, while growth is a higher priority for business and digitally disengaged customers.

By sample

Ranked in first place (ranked on domestic)

	CLIMATE CHANGE Providing a reliable electricity supply in a changing climate	NEW TECHNOLOGY Meeting customers' needs as society becomes increasingly reliant on electricity	MORE GROWTH Supporting growth in homes, businesses and industry	CHALLENGING DELIVERY ENVIRONMENT Ensuring enough skilled workers, equipment and materials are available to meet future demand
Domestic	43%	22%	19%	16%
Business	46%	15%	24%	15%
Digitally disengaged	30%	23%	27%	20%

Q11. Please consider the following challenges that SSEN have to address during 2028-2033. Please rank them from 1 to 4, where 1 is the most important and 4 is the least important.
Online domestic: 900; Business: 104; Digitally disengaged: 102



02 Background and objectives

Background

The ED3 Sector Specific Methodology Decision (SSMD, May 2026) places consumer evidence at the heart of business plan submissions. Ofgem requires DNOs to submit a Consumer Research Log demonstrating how consumer research has shaped plan decisions.

The reformed Business Plan Incentive (BPI) financially rewards plans that are well-evidenced and cost-justified, making the credibility of acceptance testing a direct commercial consideration.

Three principles govern ED3 consumer research:

1. Research must be transparent and ISG-scrutinised.
2. Where DNOs conduct similar research, Ofgem expects it to be commissioned jointly to ensure consistency and efficiency.
3. Affordability is a central focus of Ofgem's plan assessment and demonstrating that proposals are genuinely affordable must go beyond overall acceptance scores.



Research objectives

The key objectives are for the Business Plan Acceptance Testing (BPAT) to establish whether an informed, representative cross-section of customers finds the (almost final) overall ED3 business plan package and its bill implications:

- **Acceptable**
- **Affordable**
- **Reasonable**
- **Value for money**

The research aims to validate the assembled and priced package and identify whether there are any areas of customer concern that require further refinement or justification.



Diversity, inclusion and ethical considerations

Inclusion was not treated as a separate exercise: it shaped who was recruited, how people could take part, and how complex information was presented.

DIVERSITY



- The research deliberately included the groups ED3 affects most:
  - Customers on the Priority Services Register and those relying on medical equipment
  - Rural customers
  - Early adopters of low-carbon technology
  - 18–34-year-olds who don't yet pay bills
- Quotas on:
  - Age
  - Gender
  - SEG (social grade)
  - Region (Scotland / Central Southern England)
- Digitally disengaged domestic customers targeted with a face-to-face interviewing team

INCLUSION AND ACCESSIBILITY



- Plain-English materials
- Ability to zoom in on information
- Face-to-face interviewers provided with show cards to ease completion

ETHICS AND DATA PROTECTION



- Conducted under the MRS Code of Conduct and UK GDPR
- Informed consent for taking part
- Data and quotes anonymised
- Project data deleted after 6 months in line with Create Clarity's retention period
- Participants could withdraw at any time and request access to or deletion of their data
- Panel respondents rewarded under the panel's standard terms
- Sensitive topics (e.g. money worries) handled with care, with questions drafted in consultation with Citizens Advice



03 Methodology

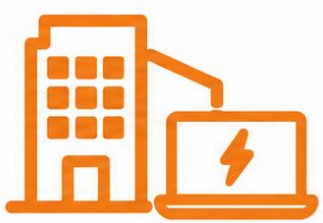
Methodology

We conducted a 15-minute survey among three samples:



DOMESTIC CUSTOMERS (ONLINE)

Quotas on:
- Age
- Gender
- SEG (social grade)
- Location (Central Southern England and Scotland)



BUSINESS CUSTOMERS (ONLINE)

No quotas, but aimed for a spread of:
- Business size
- Business sector



DIGITALLY DISENGAGED DOMESTIC CUSTOMERS (F2F)

No quotas, but targeted using ONS data to identify postcodes with higher rates of digital exclusion in:
- Scotland
- Central Southern England

Quantitative research – who we spoke to

We conducted a survey between 12 and 25 October 2026 amongst domestic and business customers. Most interviews were online, but a small sample of digitally disengaged domestic customers completed the survey face-to-face.



DOMESTIC CUSTOMERS (ONLINE)

- Live in a valid SSEN postcode
- Responsible (jointly or solely) for household electricity bills
  OR
  a future customer (under 35 and not currently responsible for bills)
- Participants were recruited from online panels using screening questions to identify target audiences
- Demographic quotas were applied to ensure representation aligned with SSEN regions



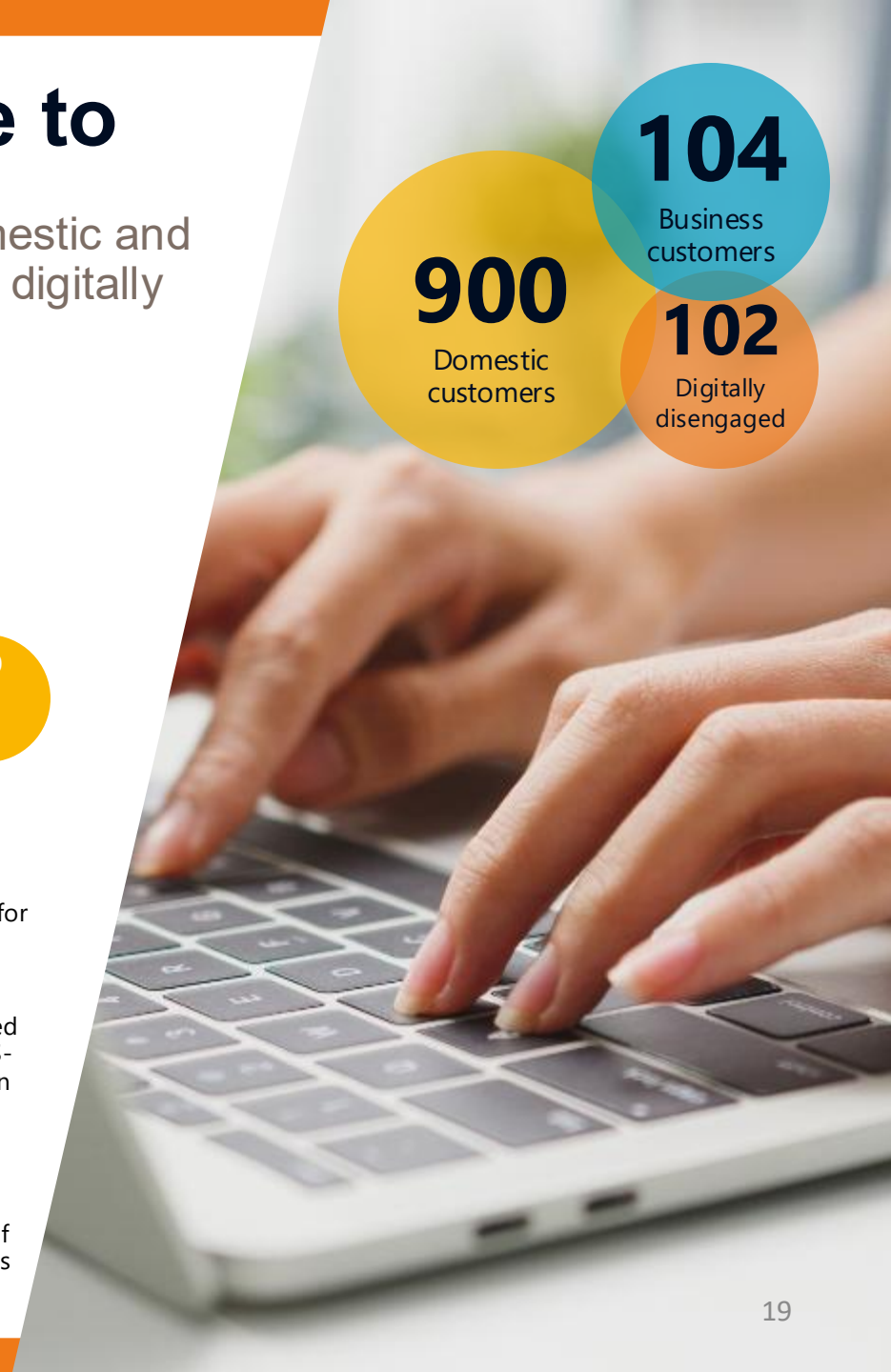
BUSINESS CUSTOMERS (ONLINE)

- Business located in a valid SSEN postcode
- Responsible (jointly or solely) for the business's electricity bills
- Have sites, offices or operational locations in the North of Scotland or Central Southern England
- Participants were recruited from online panels using screening questions to identify target audiences



DIGITALLY DISENGAGED DOMESTIC CUSTOMERS (F2F)

- Live in a valid SSEN postcode
- Responsible (jointly or solely) for household electricity bills
- Not a confident internet user
- Free-find respondents recruited by professionally trained, MRS-aligned interviewers working in postcodes with a higher likelihood of digital exclusion
- No quotas were applied, allowing the sample profile to reflect the actual population of digitally disengaged customers



How we weighted the data

DOMESTIC CUSTOMERS (ONLINE)

We conducted the fieldwork with the aim of matching quota targets as closely as possible across age, gender and SEG. Following fieldwork, the data were weighted to align with these quotas and to ensure regional representation reflected the latest Census demographic profile of the SSEN licence areas.

	Targets weighted to	Unweighted %s
GENDER (Q3)		
Male	49%	45%
Female	51%	55%
AGE (Q1)		
18 – 24 years old	12%	9%
25 – 34 years old	15%	15%
35 – 44 years old	16%	18%
45 – 54 years old	17%	15%
55 – 64 years old	16%	17%
65+	24%	26%
SEG (social grade) (Q4 – Q6)		
AB	27%	30%
C1	32%	28%
C2	21%	20%
DE	20%	23%
REGION (SQ3 / SQ9)		
Scotland	20%	32%
Central Southern England	80%	68%

BUSINESS CUSTOMERS (ONLINE)

We let the business sample fall out naturally during fieldwork. After fieldwork we weighted the two regions back to representative proportions provided by SSEN:

	Targets weighted to	Unweighted %s
REGION (SQ3 / SQ9)		
Scotland	22%	41%
Central Southern England	78%	59%

DIGITALLY DISENGAGED DOMESTIC CUSTOMERS (F2F)

No weighting was applied to this niche sample. The achieved interviews broadly reflect the profile of digitally disengaged customers, who are more likely to be older and from lower SEG groups.

However, when combining all three samples for overall analysis, the digitally disengaged sample was down-weighted so that it represented no more than 5% of the total dataset. This reflects the fact that digitally disengaged customers account for only a small proportion of the UK population.

When analysing all three samples together, we have ensured that the region breakdown is 20% Scotland / 80% Central Southern England.

Survey structure

The median survey completion time was 14½ minutes.



Postcode
Involvement in paying bills
Working status

<u>Domestic only:</u>
Age
Gender
SEG

<u>F2F only:</u>
Internet confidence

<u>Business only:</u>
Business size
Business sector



Awareness
How well they know SSEN
Info on SSEN
Challenges in energy sector



What electricity bill pays for
Value for money



Overview of business plan
Total bill impact
Acceptability
Affordability
Value for money
Reasonableness



See 3 commitments
Positive / negative
Why
Ease of understanding
Level of ambition
Anything missing?
Anything could be improved?



Acceptability
Affordability
Value for money
Reasonableness
One thing SSEN should focus on



Urban / rural
Region
Type of home
Home ownership
HH income
Ethnicity
Disability / condition
Ability to pay bills
How long struggling
Confidence in ability to pay
Power cut history
LCT ownership

Customers were then asked the below questions. These questions were repeated after having received further information on three of the commitment areas to see what impact the information had.

Acceptability

Overall, how **acceptable** is SSEN's proposed plan?

By "acceptable" we mean your overall view of the plan's priorities, investment and impact on customers, not just its cost (which will be asked separately). It's about whether you feel able to support it going ahead.

- *Very unacceptable*
- *Unacceptable*
- *Neither*
- *Acceptable*
- *Very acceptable*
- *Don't Know / not sure*

Affordability

How **affordable** do you consider the proposed package to be?

This question is about affordability specifically and measures whether you feel the bill increase resulting from the investment for 2028-2033 is manageable for customers, including yourself.

- *Very unaffordable*
- *Fairly unaffordable*
- *Fairly affordable*
- *Very affordable*
- *Don't Know / not sure*

Value for money

How would you rate SSEN's business plans and bills for 2028-2033 in terms of **value for money**?

This question asks you to weigh up what the bill pays for (the investment, services and outcomes set out in the plan) against the amount customers are being asked to pay.

- *Very poor value*
- *Poor value*
- *Neither*
- *Good value*
- *Very good value*
- *Don't Know / not sure*

Reasonableness

Overall, to what extent do you feel the proposed charges are **reasonable** given the challenges SSEN is seeking to address?

By "reasonable" we mean whether the proposed level of charges appears justified and proportionate in light of the benefits, outcomes and challenges the investment is intended to address.

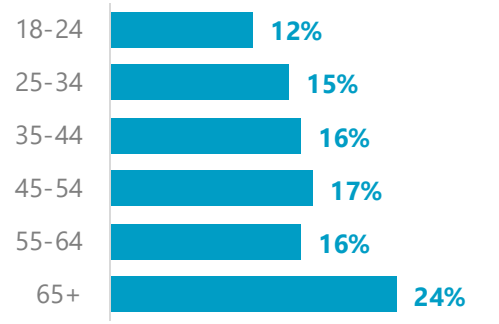
- *Not at all reasonable*
- *Not very reasonable*
- *Neither*
- *Fairly reasonable*
- *Very reasonable*
- *Don't Know / not sure*

Online domestic customer profile

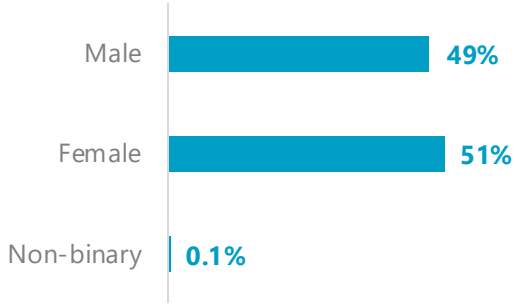
Quotas and weighting were applied on age, gender, SEG and region

Domestic

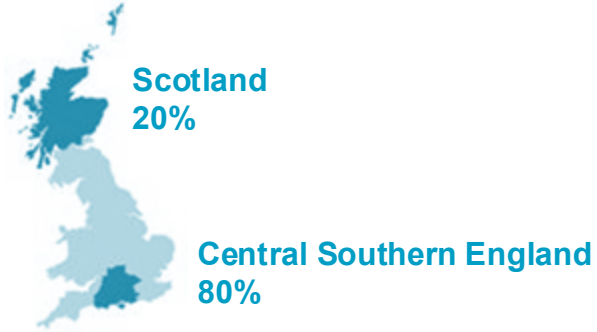
Age



Gender



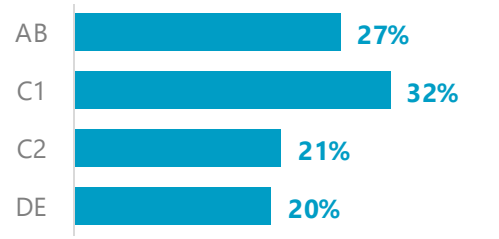
Region



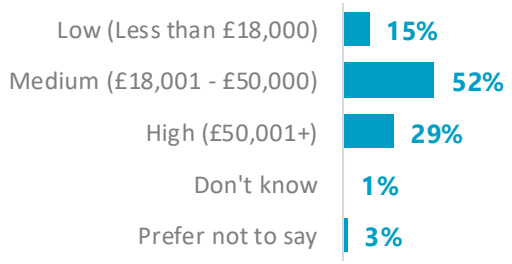
Top 5 areas by region

Scotland		Central Southern England	
Aberdeen	2%	Hampshire	20%
Stirling	2%	Berkshire	8%
Argyll & Bute	2%	Dorset	7%
Dundee City	1.5%	Wiltshire	7%
Perth & Kinross	1.4%	West Sussex	7%

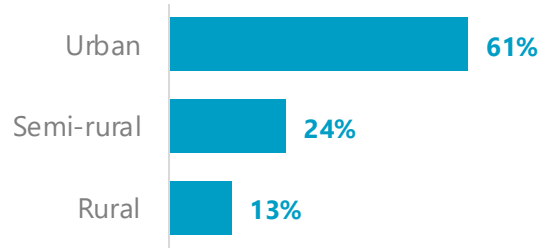
Social Grade



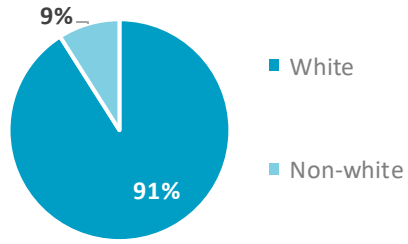
Annual household income



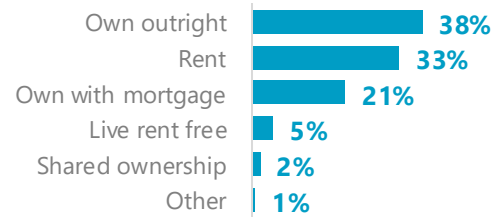
Type of area they live in



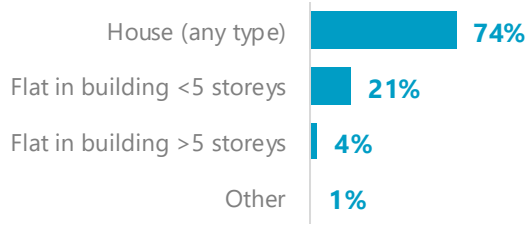
Ethnicity



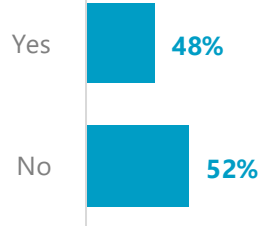
Home ownership



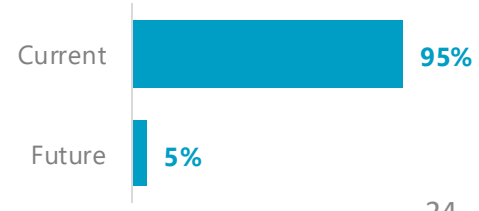
Type of home they live in



PSR Eligible



Current vs future customers



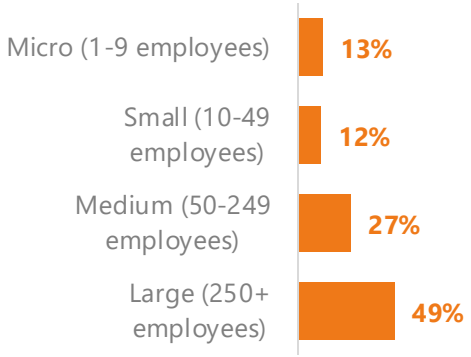
n=900

Business customer profile

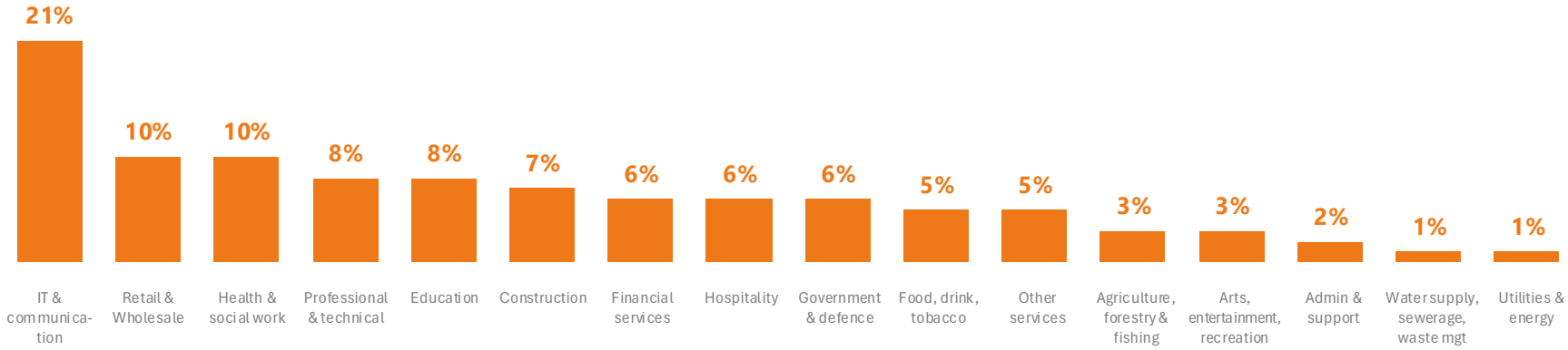
No quotas were applied, allowing the sample to fall out naturally

Business

Size of business



Business sector



Whether their sector will see significant growth



32% Yes — Data centres, AI and digital infrastructure

12% Yes — Transport and EV charging

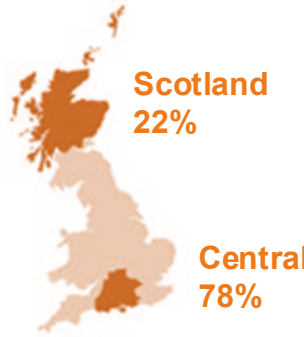
12% Yes — Manufacturing and industrial processes

7% Yes — Low-carbon energy (e.g. batteries, hydrogen, renewables)

5% Yes — Logistics and distribution

28% No

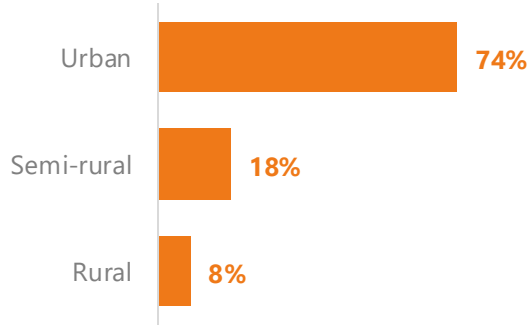
Region of main site



Scotland 22%

Central Southern England 78%

Type of area business is in



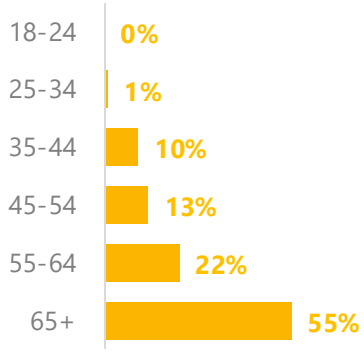
n=104

Digitally disengaged domestic customer profile

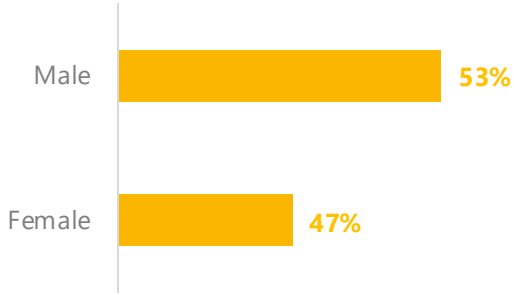
No quotas were applied, allowing the sample profile to reflect the actual population of digitally disengaged customers.

Digitally disengaged

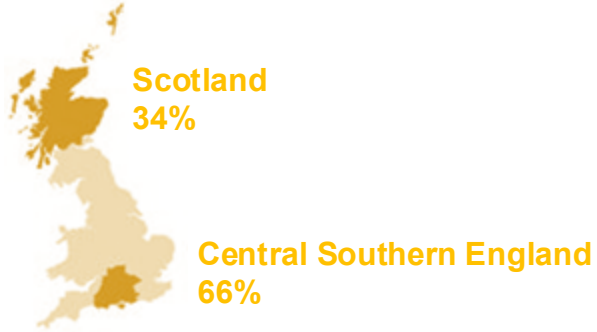
Age



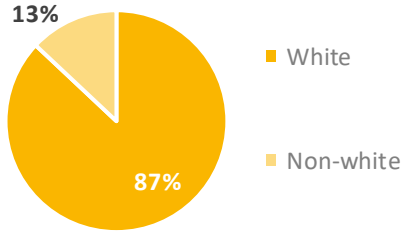
Gender



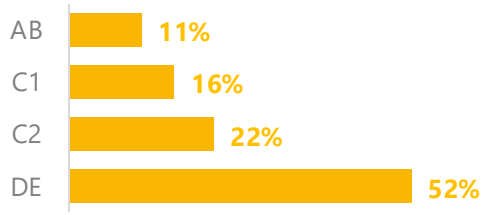
Region



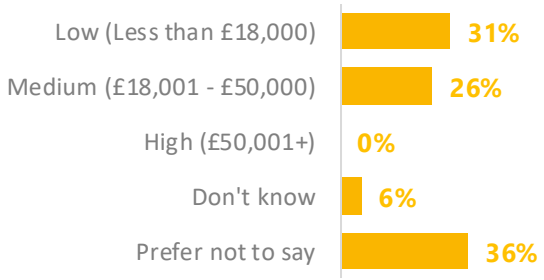
Ethnicity



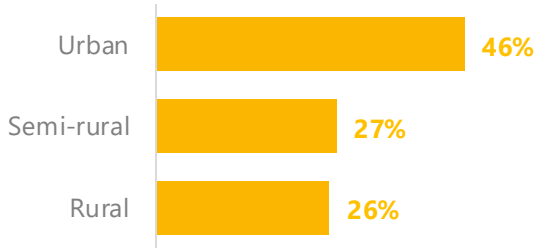
Social Grade



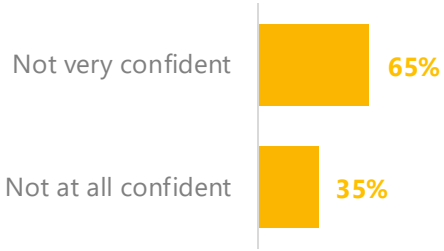
Annual household income



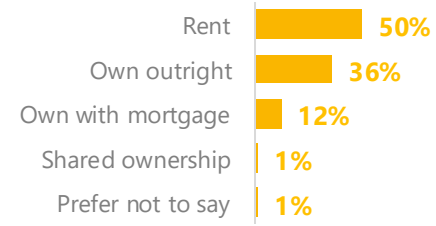
Type of area they live in



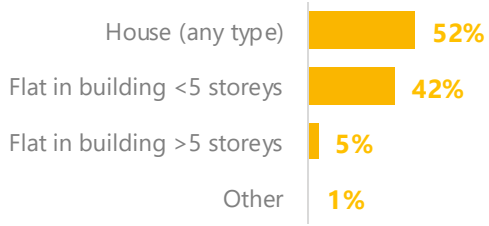
Confidence in using the internet



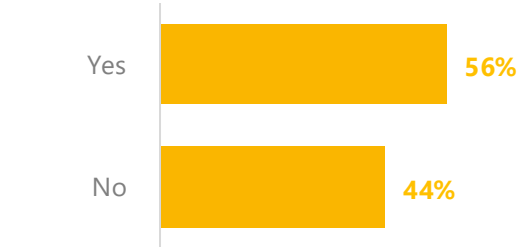
Home ownership



Type of home they live in



PSR Eligible



n=102

Glossary: terms used in this report

Acceptability	Whether customers feel able to support the plan going ahead, considering its priorities, investment and impact, not just its cost
Affordability	Whether customers feel the bill increase resulting from the 2028–2033 investment is manageable for customers, including themselves
Bottom 2 box (B2B)	The combined percentage giving the two most negative answers on a scale (for example, unacceptable and very unacceptable)
BPAT	Business Plan Acceptance Testing: research testing whether informed customers find the plan and its bill impact acceptable
BPI	Business Plan Incentive: Ofgem's incentive that financially rewards business plans that are well-evidenced and cost-justified
Commitment area	An area of the business plan setting out what SSEN will deliver in 2028-2033. Each customer saw three of seven, chosen at random
Digitally disengaged	Customers who are not confident internet users, interviewed face-to-face in postcodes with higher rates of digital exclusion
DNO	Distribution Network Operator: the company that runs the local electricity network. SSEN is the DNO for the North of Scotland and Central Southern England
Don't Know (DK)	Figures marked "excl DK" remove "Don't Know" answers from the base, so percentages are of those giving a view
ED3 (RIIO-ED3)	Ofgem's price control for electricity distribution from 2028 to 2033, which sets what network companies can spend
F2F	Face-to-face: interviews carried out in person by trained interviewers
Future customer	Someone under 35 who is not yet responsible for paying household electricity bills
Informed / uninformed	Uninformed KPIs were asked after a plan and bill overview; informed KPIs were asked again after seeing three commitment areas
ISG	Independent Stakeholder Group: an independent group that scrutinises network companies' business plans and consumer research
KPI	Key performance indicator. Here, acceptability and affordability, with value for money and reasonableness as additional measures
LCT	Low-carbon technology, such as electric vehicles, heat pumps, solar panels and batteries
MRS	Market Research Society: the UK professional body whose Code of Conduct governs ethical research
Ofgem	Great Britain's energy regulator
PSR	Priority Services Register: a free service that lets SSEN know if someone in a home may need extra help during a power cut
Reasonableness	Whether the proposed level of charges seems justified and proportionate given the benefits, outcomes and challenges the investment addresses
SEG (social grade)	Socio-economic group: a classification based on occupation (AB, C1, C2, DE)
Significant difference	A difference between groups that is unlikely to be due to chance, shown in charts and tables with arrows (95% confidence)
SSMD	Sector Specific Methodology Decision: Ofgem's May 2026 decision setting out how ED3 business plans will be assessed
Top 2 box (T2B)	The combined percentage giving the two most positive answers on a scale (for example, acceptable and very acceptable)
Value for money	Whether what the bill pays for (the investment, services and outcomes in the plan) is worth the amount customers are asked to pay
Weighting	Adjusting results so the sample matches the profile of customers in SSEN's areas, for example by age, gender, social grade and region



SSEN ED3 Acceptability Testing

Executive summary

Prepared by Dawn Mulvey and Michael Brainch

November 2026

Scottish & Southern Electricity Networks

create clarity