Ipsos MORI

Customer Engagement with the Energy market - Tracking Survey

Report prepared for Ofgem

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Introduction and Methodology

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Ofgem commissioned Ipsos MORI to conduct a face-to-face survey representative of the population of Great Britain aged 15+. The objective of the research was to enable greater understanding of switching rates among the population, and vulnerable customers specifically. Where possible, this report includes year-on-year comparisons with the previous surveys in March 2007, March 2008 and March 2010, though there are some questionnaire changes year-on-year.

The research vehicle chosen was Ipsos MORI's weekly omnibus survey, known as the *Capibus*, for which the fieldwork dates were 14-23 January 2011, achieving 1,992 computer-assisted personal interviews.

All interviews are carried out in-home using computer-assisted personal interviewing (CAPI).

Selection of Respondents

In Britain we use up to 210 sampling points selected every week (i.e. one point per week per political constituency), employ ACORN to improve how representative the sample is across the social grades and set quota controls specific to each interviewer location. By using this proven sample design, we represent all sub-sectors of the population – at a national and regional level.

Quality Control

We employ the strictest quality control procedures. In all markets our interviewers are trained to a recognised standard and one-in-ten interviews are back-checked by telephone. Furthermore, we use the CAPI software to monitor both the overall length of each interview (the average interview length does not exceed 26 minutes) and the time taken over individual questions in the questionnaire.

In Great Britain, Ipsos MORI is ISO9001, BS7911 and ISO 20252 accredited – a mark of our commitment to quality.

Data Processing

All Capibus data is processed in-house by Ipsos MORI.

Weighting

A rim weighting system is applied which weights to Market Research Society (MRS) defined profiles for age, social grade, region and working status - within sex. The idea of rim weighting is to provide the 'best weighting', or least distorting, by using computing power to run a large number of solutions from which the best is chosen.

In order to correct minor deviations in terms of the generated sample profile week on week, omnibus services use a variety of weighting procedures. Clearly, the more effective the sampling the less the need to rely on weighting to resolve problems.

While the nationally representative sample comprised 1,992 interviews, most of the figures in this report are based on 1,331 gas customers and 1,500 electricity customers. This reflects the fact that we excluded from detailed questioning those people who either did not have mains gas or electricity or who were not responsible (individually or jointly) for paying gas or electricity bills.

Throughout the report an asterisk (*) refers to any proportion less than one half of one per cent. Where percentages do not sum to 100 this is due to computer rounding or, in the case of the summary tables, to the exclusion of “don’t know” and “no answer” categories.

Summary

Summary

- In this January 2011 survey it is shown that 15% of gas customers and 17% of electricity customers switched their supplier during 2010, which compares to 17% and 18% respectively the previous year. Although the marginal year-on-year decline this represents is not statistically significant, the incidence of switching energy supplier is showing some signs of longer term decline: for example gas switching is down five points since 2008, which is significant. Similarly, electricity switching is down five points since 2007.

- There has been further equalisation of the rates of switching between different social and demographic groups. It is no longer possible to identify statistically significant differences in switching rates among "vulnerable" customer groups, though they remain marginally lower than the population as a whole. The exception is those without internet access, who remain among the least likely to switch supplier and contrast significantly with those who have internet access. The proportion of all customers with internet access has grown by eight points to 79% and there have been significant rises in the proportions with online accounts (now 21% for gas customers and 19% for electricity customers).

- There is no significant change in the proportion of customers who have *ever* switched supplier, though the figures for each fuel are down two points since last year: 41% have ever switched gas supplier and 40% have ever switched electricity supplier. Evidence of which subgroups in the population were early adopters of the switching of supplier is still apparent in the profile of switchers to date. For gas switchers this means a greater likelihood they are direct debit customers (reflecting the shift towards this method), aged 35 or older, from social group AB (professional and managerial) with internet access and not renting their home. For electricity switchers it means a greater likelihood they are on direct debit, aged 35+, from AB and C1 social groups, white rather than BME, with internet access and not renting their home. As a result, the groups lagging behind (in switching of either fuel) include standard credit and PPM customers, the 15-34s, social groups D and E, those in rented accommodation, in rural areas and with no internet access.

- The reported frequency of switching to date has fallen. The proportion that has switched each fuel more than once has fallen to 44%.

- There is some indication that the incidence of tariff switching with the same supplier is increasing, though the two-point increases (to 12% of gas customers and 10% of electricity customers) are not statistically significant in themselves.

- Just under half of all energy customers are aware they have received clearer information on the name of their tariff, any changes to it and/or the forecast cost of their energy consumption over the coming year. As Annual Statements, which include all of this information, became required only from July 1st 2010 the figures are probably not fully representative of all customers' response to them, as many may not yet have received one.

- Among those who have never switched, the proportion aware that it is possible to do so has continued to increase, now reaching 87%. There is some evidence that awareness is lowest among 15-34s, social groups D and E, BME ethnic minorities, those in rented accommodation and those with no internet access, though it is not significantly lower for any of these groups. Three-quarters (77%) of non-switchers continue to give "happy with current supplier" as the reason for not switching, particularly those aged 65+ and those who do not rent their homes. While the belief that "switching is a hassle" (mentioned by 22%) has no significant focus among any sub-group, the feeling there is no difference between suppliers (20%) is more prevalent among the 35+ age group, ABs and those who do not rent their homes. Just 13% say they have already checked they are on a good deal. Very few give the reasons that they do not know how to go about switching or where to get information.

- The pattern of reasons for switching on the last occasion remains, as in previous surveys, dominated by the desire to save money. Better service is a very distant secondary reason. Few mention a desire for fixed price deals or green tariffs.

- Doorknocking by salespeople continues to be the leading method by which switchers find out about the deals offered, though it is still declining. It is particularly important to PPM customers, the 65+ age group, the state-supported social group E and those without internet access. The use of online price comparison sites is second most frequently mentioned as a source of information, though it, too, has declined marginally. It is more frequently the choice of the 35-64 age group, ABC1 and C2 social groups, and those with internet access. BME customers make particular use of online sites, though the sub-sample size is too small to give a reliable comparison.

- A new question on the method used to actually complete the last switch underlines the importance of doorstep selling in particular (used by 29% of gas switchers and 28% of electricity switchers) and of any contact with supplier salespeople in general terms (if call centre staff are included this rises to 68% of gas switchers and 69% of electricity switchers). Just 16% of switchers actually completed their last switch directly through an online price comparison service. It seems likely many of those who researched the deal online completed it by telephoning the supplier – this is the second most frequently used method among gas switchers (25%) and is used by as many electricity switchers as doorknocking salespeople (28%).

- Customers' evaluations of their switching experiences continue to be very positive. Just under two-thirds of switchers of either fuel who switched to save money believe they actually are paying less. There is some suggestion that standard credit customers in gas and electricity are something of an exception to this - less sure to have saved money and more likely to say "don't know" – but it is difficult to be conclusive as the sub-sample sizes are too small.

- Over three-quarters of switchers of either fuel agree they found it easy to decide on which deal – this represents a significant improvement since last year in the case of gas switchers. Similarly high proportions, over three-quarters, agree that they fully understand the key features of their deal. In a new question on switches during 2010, 85% of all 2010 switchers rate the process of their last switch as very or fairly easy; just four percent rate it as very or fairly difficult.

Main Findings

Incidence of switching

Q5. Did you switch your gas supplier during 2010?

	All	Age			Region			Tenure		All		
		15-34	35-64	65+	Eng-land	Scot-land	Wales	Rented	Non-rented	2007	2008	2010
Base: All with mains gas who are responsible for the bill	*(1,331) %*	*(249) %*	*(726) %*	*(356) %*	*(1,144) %*	*(107) %*	*(80) %*	*(304) %*	*(1,024) %*	*(1,243) %*	*(1,256) %*	*(1,369) %*
Yes	15	15	16	14	15	15	19	15	15	19	20	17
No	85	85	84	86	85	85	81	85	85	81	80	83

Source: Ipsos MORI

Q10. Did you switch your electricity supplier during 2010?

	All	Age			Region			Tenure		All		
		15-34	35-64	65+	Eng-land	Scot-land	Wales	Rented	Non-rented	2007	2008	2010
Base: All with mains electricity who are responsible for the bill	*(1,500) %*	*(271) %*	*(821) %*	*(408) %*	*(1,277) %*	*(114) %*	*(109) %*	*(340) %*	*(1,157) %*	*(1,516) %*	*(1,519) %*	*(1,540) %*
Yes	17	17	17	15	17	15	16	16	17	22	19	18
No	83	83	83	85	83	85	84	84	83	78	81	82

Source: Ipsos MORI

The incidence of switching in 2010 shows signs of further decline: 15% of gas customers and 17% of electricity customers switched their supplier during the year. The year-on-year declines of 2% and 1% respectively are not statistically significant in themselves, but may be indicative of a longer term downward trend.

There continues to be some evidence that the 65+ age group is lagging a little behind in its current rate of switching both fuels, and the state-supported group E in gas switching, but the differences are no longer statistically significant. Similarly, by payment method, standard credit customers for gas and electricity are indicated to be less likely to have switched in 2010, but again this is not a statistically significant difference. Those who now have dual fuel are more likely to be switchers (dual fuel penetration has risen again this year and now constitutes 62% of gas customers and 55% of electricity customers).

Did you switch your gas supplier in 2010? – by payment method

	All	Payment Method: Direct debit	Payment Method: Standard credit	Payment Method: PPM (gas)	Dual fuel
Base:	*(1,331)* *%*	*(900)* *%*	*(186)* *%*	*(163)* *%*	*(829)* *%*
Yes	15	16	11	15	18
No	85	84	89	85	82

Source: Ipsos MORI

Did you switch your electricity supplier in 2010? – by payment method

	All	Payment Method: Direct debit	Payment Method: Standard credit	Payment Method: PPM (gas)	Dual fuel
Base:	*(1,500)* *%*	*(1,013)* *%*	*(189)* *%*	*(209)* *%*	*(829)* *%*
Yes	17	18	19	17	21
No	89	82	87	83	79

Source: Ipsos MORI

Did you switch your gas supplier in 2010? – by social grade

	All	Social grade: AB	Social grade: C1	Social grade: C2	Social grade: D	Social grade: E
Base: All with mains gas who are responsible for the bill	*(1,331)* *%*	*(340)* *%*	*(394)* *%*	*(303)* *%*	*(167)* *%*	*(127)* *%*
Yes	15	16	13	21	12	13
No	85	84	87	79	88	87

Source: Ipsos MORI

Did you switch your electricity supplier in 2010? – by social grade						
	All	**Social grade**				
		AB	C1	C2	D	E
Base: All with mains electricity who are responsible for the bill	*(1,500) %*	*(387) %*	*(445) %*	*(339) %*	*(185) %*	*(144) %*
Yes	17	16	16	21	14	17
No	83	84	84	79	86	83

Source: Ipsos MORI

Both gas and electricity switching is significantly higher among the C2 social group (skilled manual workers) this year, but other sub-groups are not notably different to the overall proportions.

By comparison with last year there has been some change in the social group profile of switchers. Gas switching is nine points lower this year among the C1 group (white collar workers). For professional and managerial ABs and for C2s, however, the incidence of switching is marginally up. Electricity switching shows the same pattern, except that the state-supported group E also shows a marginal increase.

Some other sub groups have shown year-on-year trends that are marginally up, contrasting with the overall downward trend. For example, gas switching is up among the 65+ age group and among customers in Wales, though neither difference is statistically significant. Electricity switching is marginally up among standard credit customers and, again, those aged 65+ and in Wales.

Did you switch your supplier in 2010? – Effect of internet access								
	Q5. Gas				**Q10. Electricity**			
	Internet Access				**Internet Access**			
	All	Yes	No	2010 Yes	All	Yes	No	2010 Yes
Base: All with each fuel who are responsible for the bills	*(1,331) %*	*(1,064) %*	*(267) %*	*(999) %*	*(1,500) %*	*(1,188) %*	*(312) %*	*(1,098) %*
Yes	15	16	11	19	17	18	13	20
No	85	84	89	81	83	82	87	80

Source: Ipsos MORI

The penetration of internet access has grown by eight points to 79% since last year. At the same time, the proportions of energy customers who are on online tariffs has also grown strongly: for gas customers it is now 21% (up nine points); for electricity customers it is 19% (up seven points). While internet access continues to be associated with higher levels of switching for both fuels, the proportions switching among those with and without access are both down a little, and the difference between those with and without internet access is somewhat less marked, but still a significant difference nonetheless.

Q5/7. Summary Table – Ever Switched Gas Supplier (to end of 2010)

	All	Age			Region			Tenure		All		
		15-34	35-64	65+	Eng-land	Scot-land	Wales	Rented	Non-rented	2007	2008	2010
Base: All with mains gas who are responsi-ble for the bill	*(1,331) %*	(249) %	*(726) %*	*(356) %*	*(1,144) %*	*(107) %*	*(80) %*	*(304) %*	*(1,024) %*	*(1,243) %*	*(1,256) %*	*(1,369) %*
Yes	41	32	45	40	40	46	45	32	43	37	43	43
No	59	68	55	60	60	54	55	68	57	63	57	57

Source: Ipsos MORI

Q10/12. Summary Table – Ever Switched Electricity Supplier (to end of 2010)												
	All	Age			Region			Tenure		All		
		15-34	35-64	65+	England	Scotland	Wales	Rented	Non-rented	2007	2008	2010
Base: All with mains electricity who are responsible for the bill	*(1,500) %*	*(271) %*	*(821) %*	*(408) %*	*(1,277) %*	*(114) %*	*(109) %*	*(340) %*	*(1,157) %*	*(1,516) %*	*(1,519) %*	*(1,540) %*
Yes	40	30	44	38	40	43	40	32	42	39	40	42
No	60	70	56	62	60	57	60	68	58	61	60	58

Source: Ipsos MORI

For the second year running the overall incidence of customers who have *ever* switched supplier is effectively unchanged. While the figures are, in fact, down two points respectively to 41% ever switched gas supplier and 40% ever switched electricity supplier, the change since last year is not statistically significant.

Gas switchers to date are most likely to be on direct debit, aged 35 or older, social group AB, with internet access and not renting their home. PPM customers are marginally more likely to have switched than those on standard credit. Scotland and Wales are indicated to have higher levels of switching gas to date, but sample sizes are too small to be significant.

Electricity switchers are similarly most likely to be on direct debit (and marginally more likely to be PPM customers than on standard credit). They are also more likely to be aged 35+, ABC1 social groups, white rather than BME, with internet access and not renting their home. Geographical differences are less pronounced than for gas.

For both fuels, switching in rural areas is indicated to be lower than urban/suburban areas, though differences are only marginal.

In summary, the groups lagging relatively behind (in switching of either fuel to date) include standard credit and PPM customers, the 15-34s, social groups D and E, those in rented accommodation, those in rural areas and those with no internet access.

This year shows a decline in the reported number of times each switcher has ever switched. The proportion switching their gas supplier just once has increased significantly to 56%, from 49% last year. At the same time the proportion switching more than once is down from 51% to 44%. Similarly among electricity switchers the proportion switching just once is up from 46% to 56%.

Summary table – ever switched gas supplier (to end of 2010) – by social grade

	All	Social grade				
		AB	C1	C2	D	E
Base: All with mains gas who are responsible for the bill	*(1,331) %*	*(340) %*	*(394) %*	*(303) %*	*(167) %*	*(127) %*
Yes	41	49	41	37	35	32
No	59	51	59	63	65	68

Source: Ipsos MORI

Summary table – ever switched electricity supplier (to end of 2010) – by social grade

	All	Social grade				
		AB	C1	C2	D	E
Base: All with mains electricity who are responsible for the bill	*(1,500) %*	*(387) %*	*(445) %*	*(339) %*	*(185) %*	*(144) %*
Yes	40	44	42	39	33	36
No	60	56	58	61	67	64

Source: Ipsos MORI

Switching tariffs

Q9. Even though you stayed with the same gas supplier during 2010, did you change the tariff you have with them or the method by which you pay them?

	All	Payment Method			Internet Access		Region			All	
		DD (gas)	Std Credit (gas)	PPM (gas)	Yes	No	England	Scotland	Wales	2008	2010
Base: All who did not switch gas supplier during 2009	*(1,127) %*	*(747) %*	*(166) %*	*(141) %*	*(890) %*	*(237) %*	*(969) %*	*(94) %*	*(64) %*	*(1,012) %*	*(1,134) %*
Yes	12	14	8	9	14	5	12	19	12	9	10
No	84	83	87	87	82	89	84	77	82	88	88
Don't know	4	3	5	4	4	6	4	4	6	4	2

Source: Ipsos MORI

Q14. Even though you stayed with the same electricity supplier during 2010, did you change the tariff you have with them or the method by which you pay them?

	All	Payment Method			Internet Access		Region			All	
		DD (elec)	Std Credit (elec)	PPM (elec)	Yes	No	England	Scotland	Wales	2008	2010
Base: All who did not switch electricity supplier during 2009	*(1,246) %*	*(820) %*	*(166) %*	*(177) %*	*(971) %*	*(275) %*	*(1,055) %*	*(100) %*	*(91) %*	*(1,227) %*	*(1,273) %*
Yes	10	12	5	7	12	5	10	15	17	8	8
No	86	85	92	90	85	91	87	85	78	89	89
Don't know	3	3	3	3	3	5	4	0	6	4	2

Source: Ipsos MORI

The proportions of gas and electricity customers who have switched tariff with an existing supplier have both increased by two points in the past year, to 12% and 10% respectively. While this increase is not statistically significant it does continue a gradual upward trend since 2008 in the case of gas customers.

Those now on direct debit, with internet access, aged 35+, ABC1 (C1 only for electricity) and not renting their home are most likely to have switched their tariffs, in the case of both fuels.

There is no significant difference in tariff switching between those in rural and urban areas.

Information on annual statements

Q2d-1. In the last year have you received clearer information from your supplier about:

The name of the tariff you are on?

	All	Payment Method				Internet Access		Region		
		DD (gas)	Std Credit (gas)	PPM (gas)	PPM (Elec)	Yes	No	England	Scotland	Wales
Base: All with either mains gas or electricity who are responsible for bills	*(1,525)* %	*(900)* %	*(186)* %	*(163)* %	*(209)* %	*(1,206)* %	*(319)* %	*(1,301)* %	*(115)* %	*(109)* %
Yes	42	46	39	28	32	45	32	42	51	32
No	40	36	38	55	50	37	51	40	32	43
Don't know	18	18	23	17	18	18	17	18	17	25

Source: Ipsos MORI

Suppliers were required to start issuing Annual Statements to customers from 1st July 2010. Three elements of the information included in Annual Statements were asked about in this survey.

Just under half of energy customers (42%) believe they have received clearer information from their supplier about the name of their tariff. Almost as many (40%) are sure they have not. There are some indications that customers on direct debit, social groups ABC1C2, those in Scotland and those with internet access are most likely to be aware of having received this information.

Q2d-2. In the last year have you received clearer information from your supplier about: Any changes to your tariff?

	All	Payment Method				Internet Access		Region		
		DD (gas)	Std Credit (gas)	PPM (gas)	PPM (Elec)	Yes	No	England	Scotland	Wales
Base: All with either mains gas or electricity who are responsible for bills	*(1,525) %*	*(900) %*	*(186) %*	*(163) %*	*(209) %*	*(1,206) %*	*(319) %*	*(1,301) %*	*(115) %*	*(109) %*
Yes	45	48	39	41	41	46	39	44	54	45
No	44	41	46	50	49	42	50	45	35	47
Don't know	11	11	15	9	10	11	11	11	11	8

Source: Ipsos MORI

Just under half (45%) are also aware they have received clearer information on any changes to their tariff in the last year, but again almost as many (44%) are sure they have not. Awareness of this is notably greater among direct debit customers, customers who are aged 65+, ABC1C2 social groups, those who do not rent their home and those with internet access.

Q2d-3. In the last year have you received clearer information from your supplier about: The forecast cost of your energy consumption over the coming year

	All	Payment Method				Internet Access		Region		
		DD (gas)	Std Credit (gas)	PPM (gas)	PPM (Elec)	Yes	No	England	Scotland	Wales
Base: All with either mains gas or electricity who are responsible for bills	*(1,525) %*	*(900) %*	*(186) %*	*(163) %*	*(209) %*	*(1,206) %*	*(319) %*	*(1,301) %*	*(115) %*	*(109) %*
Yes	45	46	47	47	44	46	38	43	58	43
No	44	42	38	47	48	42	51	45	32	49
Don't know	11	12	16	6	8	12	10	12	10	9

Source: Ipsos MORI

A similar proportion (45%) is aware of receiving clearer information about the forecast cost of their energy consumption for the coming year. Again 44% are sure they have not. In this instance the subgroups which are significantly more likely to be aware of this are somewhat different. They include the AB social group, the white ethnic group, those who do not rent their homes and those in Scotland.

Knowledge and preconceptions about switching

Q15. Did you know it was possible to switch to a different gas/electricity supplier?

	All	Age			Social Grade		Ethnic		Tenure		Rural Customers	All	
		15-34	35-64	65+	AB	E	White	BME	Rented	Non-rented		2008	2010
Base: All responsible for bills but who have never switched gas or electricity supplier	*(875) %*	*(183) %*	*(452) %*	*(240) %*	*(196) %*	*(93) %*	*(768) %*	*(101) %*	*(223) %*	*(650) %*	*(194) %*	*(844) %*	*(847) %*
Yes	87	82	90	87	90	77	89	69	83	89	90	80	83
No	10	13	8	11	8	18	9	23	13	9	7	16	14
Don't know	3	5	2	2	2	5	2	8	4	2	3	4	4

Source: Ipsos MORI

Among those who have never switched either energy supplier, 87% are now aware it is possible to switch supplier. This represents a significant increase since last year, and it is now seven points higher than 2008.

Those most likely to be aware are aged 35-64, from ABC1C2 social groups, white and non-renters. Conversely, awareness is indicated to be lower among the15-34 age group, social groups DE, BME ethnic minorities, those in rented accommodation and those with no internet access, though differences are not statistically significant.

Q16. For each of the items on this card, could you please say which of them apply to you?											
	All	Age			Social Grade		Payment method		Internet Access		Rural Customers
		15-34	35-64	65+	AB	E	Direct debit (gas)	Standard Credit (gas)	Yes	No	
Base: All those who are responsible for bills but who have never switched gas or electricity suppliers	*(875) %*	*(183) %*	*(452) %*	*(240) %*	*(196) %*	*(93) %*	*(448) %*	*(768) %*	*(223) %*	*(650) %*	*(194) %*
I'm happy with my current supplier/s	77	66	78	84	77	72	81	72	75	81	77
Switching is a hassle	22	22	23	21	24	23	21	23	23	20	21
I don't think there is much difference between the suppliers to make switching worthwhile	20	13	22	22	26	13	18	25	20	20	19
I've checked prices of other suppliers and I am already on a good deal	13	16	12	11	13	10	16	9	15	6	18
I am unsure about where to get information to help me make a good choice	4	6	4	1	5	2	3	7	4	3	3
I live in a rented home and don't think my landlord would allow me to switch	3	8	2	1	2	2	2	2	3	4	1
I wouldn't know how to go about switching even if I wanted to	2	3	1	1	2	2	1	2	1	2	1
I am in debt with my current supplier/s so don't think I would be able to switch	1	3	1	1	0	4	1	1	1	1	1
None of these	3	4	3	3	3	5	3	2	3	3	4

Source: Ipsos MORI

The reasons for not having switched continue to be dominated by the three-quarters who say they are happy with their current supplier. While this response dominates most sub groups in the survey, it is particularly prevalent among the 65+and people who do not rent their home.

It is also indicated to be marginally higher among social groups C2D and those aged 35-64, as well as those with no internet access.

The belief that “switching is a hassle” is held by about one in five non-switchers (22%) with no significant focus on any subgroup. However the belief that there is no difference between suppliers (held by 20%) is more prevalent among the 35+, ABs and non-renters. Just 13% say they have checked they are already on a good deal. This answer is particularly likely to be given by those with internet access, those in rural areas and those on direct debit.

Very few admit to not knowing where to get information to make a choice (4%) or especially to admit they would not know how to go about switching (2%)., Similarly problems with pre-existing debt affect only one percent and restrictions of landlords just 3%.

Reasons for switching on last occasion

The pattern of reasons given for switching remains stable overall. For both gas and electricity, the aim of saving money is key for eight out of ten switchers – not significantly different to last year. Only the youngest (16-34) age group is indicated to mention this marginally less frequently than older customers.

There is, again, little difference in the pattern of secondary reasons, with the quest for better service and the desire for a dual fuel package most frequently mentioned. As last year, the importance of better service to PPM customers in particular is emphasised, though numbers are too small to be conclusive. There is some indication the desire for a fixed price deal may be less of a reason (down two points after a previous upward trend) but the numbers are too small to be significant.

Q17. Thinking about the last time you switched your gas supplier, what was the main trigger causing you to switch?

	All	**Age**			**Social Grade**		**Payment Method**	**All**		
		15-34	35-64	65+	AB	DE	PPM (gas)	2007	2008	2010
Base: All with mains gas and responsible for bill who have ever switched gas supplier	*(543) %*	*(80) %*	*(321) %*	*(142) %*	*(171) %*	*(97) %*	*(53) %*	*(436) %*	*(536) %*	*(589) %*
Believed new supplier to be cheaper/to save money	79	67	81	82	78	74	70	76	78	78
Believed new supplier offered better service	7	9	5	9	6	6	16	9	6	6
Wanted to switch to a dual fuel package	4	1	5	3	5	8	1	5	3	6
Wanted to switch to a fixed price deal	1	1	1	0	1	1	1	1	2	3
Wanted to switch to a “greener” tariff	1	3	1	0	1	1	0	*	1	1
Wanted to switch to online tariff	1	2	*	*	0	0	3	-	0	0
Other	6	13	5	2	5	6	6	7	7	1

Source: Ipsos MORI

Q21. Thinking about the last time you switched electricity supplier, what was the main trigger causing you to switch?

	All	Age			Social Grade		Payment Method	All		
		15-34	35-64	65+	AB	DE	PPM (elec)	2007	2008	2010
Base: All with mains electricity and responsible for bill who have ever switched electricity supplier	*(587) %*	*(84) %*	*(349) %*	*(154) %*	*(169) %*	*(107) %*	*(65) %*	*(560) %*	*(611) %*	*(633) %*
Believed new supplier to be cheaper/to save money	77	74	76	80	79	70	74	71	77	77
Believed new supplier offered better service	7	7	6	8	7	5	9	10	6	7
Wanted to switch to a dual fuel package	5	6	6	3	4	9	5	7	4	6
Wanted to switch to a fixed price deal	2	*	2	*	1	3	1	3	2	4
Wanted to switch to a "greener" tariff	2	1	2	*	3	1	0	1	2	1
Wanted to switch to an online tariff	*	0	0	1	0	0	0	-	0	*
Other	6	9	6	3	6	8	6	5	6	1

Source: Ipsos MORI

Finding out about the deals available

Q19a. Thinking about the last time you switched gas supplier, how did you find out about the deals offered by the supplier you switched to?

	All	Payment Method PPM (gas)	Age			Social Grade		Tenure		All	
			15-34	35-64	65+	AB	E	Rented	Non-rented	2008	2010
Base: All with mains gas and responsible for bill who have ever switched gas supplier	*(543) %*	*(53) %*	*(80) %*	*(321) %*	*(142) %*	*(171) %*	*(42) %*	*(105) %*	*(437) %*	*(536) %*	*(589) %*
They knocked on my door	31	45	32	29	39	23	52	36	31	41	33
Online/website price comparison service	21	6	17	26	12	26	13	14	23	21	26
They phoned me	7	7	2	5	4	6	3	5	7	7	8
Salesperson in public place	7	6	9	4	13	7	12	6	7	-	7
Friend or family member	6	6	4	7	6	5	9	7	6	6	7
I saw an advert	4	2	2	5	4	5	5	6	4	11	5
Phoned comparison service	7	12	8	8	3	10	4	8	6	-	4
Looked at more than one supplier website	3	2	2	3	3	4	0	1	3	-	4
I rang them (only)	3	5	10	1	2	1	3	5	2	5	2
Looked at supplier’s own website	4	4	5	4	3	5	0	6	3	-	1
I rang them and other suppliers	2	1	3	1	4	1	2	2	2	4	1
Other	5	8	5	6	4	6	1	9	4	6	5
Don’t know	4	4	4	3	4	6	5	2	4	4	3

Source: Ipsos MORI

Q23a. Thinking about the last time you switched electricity supplier, how did you find out about the deals offered by the supplier you switched to?

	All	Payment Method PPM (elec)	Age			Social Grade		Tenure		All	
			15-34	35-64	65+	AB	E	Rented	Non-rented	2008	2010
Base: All with mains electricity and responsible for bill who have ever switched electricity supplier	*(583) %*	*(65) %*	*(84) %*	*(349) %*	*(154) %*	*(169) %*	*(51) %*	*(113) %*	*(473) %*	*(611) %*	*(633) %*
They knocked on my door	29	46	31	27	34	20	38	30	29	41	34
Online/website price comparison service	24	9	19	28	14	29	10	15	26	22	27
They phoned me	9	11	7	9	9	8	14	9	9	6	8
Friend or family member	6	6	5	7	4	4	7	8	5	5	7
Salesperson in public place	7	5	8	6	10	8	9	8	7	-	6
I saw an advert	5	0	1	5	5	5	5	4	5	12	4
Phoned comparison service	5	4	8	4	3	7	5	6	5	-	3
Looked at more than one supplier website	2	2	1	3	1	3	0	1	3	-	3
Looked at supplier's own website	4	0	3	4	3	6	0	4	4	-	2
I rang them (only)	4	7	6	2	6	2	5	7	3	4	2
I rang them and other suppliers	2	4	4	1	4	2	2	3	2	3	2
Other	5	4	8	3	6	7	1	6	4	6	6
Don't know	4	3	2	4	5	5	6	3	4	5	2

Source: Ipsos MORI

Doorknocking by salespeople continues to be the principal method by which switchers find out about the deals offered, though it is still declining, especially in the case of electricity. It is particularly important for some groups such as PPM customers, those aged 65+, social group E and those without internet access. Perhaps surprisingly, the use of online price comparison services has fallen marginally this year for both fuels, though still remains second to doorknocking. Use of online comparison sites is skewed towards 35-64s, ABC1C2s and of course those with internet access. BME customers also make particular use of online price comparisons for switching electricity supplier (39%), though this could be artificially high due to a very small sub-sample size.

Among other methods there is little change since last year; all account for less than 10% of switchers of each fuel. Possibly notable (though marginal) changes include some indication of more use of the telephone: 7% of gas switchers phoned a comparison service, including 12% of PPM customers and 12% of standard credit customers. At the same time 9% of electricity switchers say they have been called by the supplier, which includes11% of PPM customers and 14% of social group E. Salespersons operating in public places are marginally most likely to contact the 65+ and social group E.

Method used to make the last switch

These are new questions, added in 2011, which establish which **one** method each switcher used to switch on their last occasion. Only one answer was allowed.

It underlines for both fuels the continued critical importance of the role of doorstep selling – used by 29% of gas switchers and 28% of electricity switchers. While more important for certain groups: PPM customers (and to some extent standard credit customers), the over 65s and those with no internet access, doorstep switching also affects all other groups, including ABs.

Almost as important as doorstep selling, 25% of gas switchers and 28% of electricity switchers called the supplier and made the switch on the telephone. This method was particularly significant for standard credit customers in both gas and electricity, for those in rented accommodation and for the 16-34 age group. Among gas switchers, the BME group were also more likely to phone to close the deal (40%), though the size of this sub-group is too small to be conclusive.

Just 16% of switchers actually completed their switch directly through an online price comparison service for each fuel. It seems likely some of these may have used the telephone to complete the transaction – 27% of gas switchers and 28% of electricity switchers with internet access phoned the supplier. A few may have used the supplier's own website: (4% of gas switchers; 5% of electricity switchers).

Contact with salespersons in other places also accounts for a substantial further proportion of switches – 8% of gas and electricity switchers mentioned making the switch on the phone with a salesperson who called them. Also 6% of gas switchers and 5% of electricity switchers completed the deal with a salesperson in a public place. Therefore, in total, 43% of gas switchers and 41% of electricity switchers completed their last switch with a salesperson. If supplier sales staff at supplier call centres are included the proportions rise to a majority in both cases: 68% of gas switchers and 69% of electricity switchers.

Q19b. Thinking about the last time you switched gas supplier, how did you switch?

	All	Standard credit (gas)	Age			Social Grade		Tenure	
			15-34	35-64	65+	AB	E	Rented	Non-rented
Base: All with mains gas and responsible for bill who have ever switched gas supplier	*(543) %*	*(50) %*	*(80) %*	*(321) %*	*(142) %*	*(171) %*	*(97) %*	*(105) %*	*(437) %*
With a salesperson who knocked on my door	29	31	35	24	36	18	42	37	27
By phoning the supplier	25	41	33	25	22	25	26	35	23
Via an online price comparison site	16	4	6	22	8	20	3	5	18
With a salesperson who phoned me	8	7	5	8	8	6	10	7	8
With a salesperson in the street/shopping centre/other public place	6	3	7	4	12	7	8	5	7
On the supplier's website	4	5	2	5	3	6	3	1	5
By phoning a price comparison service	2	0	2	3	0	3	1	2	2
By letter/mail	1	1	0	1	1	1	0	0	1
Via another website (that wasn't a price comparison site or the supplier's website)	1	0	0	1	1	1	0	0	1
Some other way	2	1	3	2	0	3	4	3	1
Don't know	6	2	7	5	7	3	4	5	6

Source: Ipsos MORI

Q23b. Thinking about the last time you switched electricity supplier, how did you switch?

	All	Standard Credit (elec)	Age			Social Grade		Tenure	
			15-34	35-64	65+	AB	E	Rented	Non-rented
Base: All with mains electricity and responsible for bill who have ever switched electricity supplier	*(587) %*	*(65) %*	*(84) %*	*(349) %*	*(154) %*	*(169) %*	*(107) %*	*(113) %*	*(473) %*
By phoning the supplier	28	46	38	27	24	28	30	41	25
With a salesperson who knocked on my door	28	30	31	25	33	17	35	28	28
Via an online price comparison site	16	2	6	20	8	21	3	5	18
With a salesperson who phoned me	8	4	10	7	8	6	8	10	7
On the supplier's website	5	0	1	6	4	6	6	2	5
With a salesperson in the street/shopping centre/other public place	5	2	6	4	9	6	5	5	5
By phoning a price comparison service	2	6	2	3	2	4	1	2	2
By letter/mail	1	1	0	1	1	1	0	*	1
Via another website (that wasn't a price comparison site or the supplier's website)	1	0	0	1	0	1	0	0	1
Some other way	1	1	2	1	1	2	2	2	1
Don't know	6	6	3	5	9	6	8	5	6

Source: Ipsos MORI

Customers' evaluation of switching

Q20a. To the best of your knowledge, do you feel that you are now paying less than you would have if you had not switched? (gas)

	All	Payment Method (Gas)			Tenure		All	
		DD	Std Credit	PPM	Rented	Non-rented	2008	2010
Base: All who switched gas supplier to save money	*(432) %*	*(344) %*	*(33) %*	*(38) %*	*(82) %*	*(349) %*	*(446) %*	*(461) %*
Yes	62	64	44	64	71	61	64	64
No	12	12	15	8	10	12	20	14
Don't know	26	24	41	28	19	27	15	22

Source: Ipsos MORI

Q24a. To the best of your knowledge, do you feel that you are now paying less than you would have if you had not switched? (electricity)

	All	Payment Method (Elec)			Tenure		All	
		DD	Std Credit	PPM	Rented	Non-rented	2008	2010
Base: All who switched electricity supplier to save money	*(461) %*	*(362) %*	*(33) %*	*(50) %*	*(85) %*	*(375) %*	*(516) %*	*(491) %*
Yes	64	65	48	75	70	64	62	67
No	11	11	15	10	12	11	24	12
Don't know	25	24	37	15	18	25	15	21

Source: Ipsos MORI

Just under two-thirds of those who switched each fuel believe they are paying less than they would have if they had not switched, though both proportions are marginally down: to 62% for gas switchers and 64% for electricity switchers. Perhaps more significantly however, the proportion who doesn't know if they have made a saving is up for both fuels, for the second year running, and is now 26% for gas and 25% for electricity.

Those now paying by direct debit or PPM are more likely than those now on standard credit to believe they are paying less. It is also important to note the greater proportion of standard credit customers who don't know, though it is difficult to be conclusive with so small a sub-sample size.

For both gas and electricity the 15-34 age group is most likely to feel they are paying less, as are those with internet access.

Q20b-1. How much do you agree or disagree that:

"I found it easy to decide which deal to switch my gas to"

	All	Age			Social Grade		Internet Access		2010
		15-34	35-64	65+	AB	DE	Yes	No	
Base: All with mains gas and responsible for bills who have ever switched gas supplier	*(543) %*	*(80) %*	*(321) %*	*(142) %*	*(171) %*	*(97) %*	*(467) %*	*(76) %*	*(589) %*
Agree	77	74	77	77	73	78	77	76	72
Neither	8	12	6	9	7	9	8	10	13
Disagree	13	11	14	11	18	12	13	13	14
Don't know	2	3	2	2	2	2	2	2	1

Source: Ipsos MORI

Q24b-1. How much do you agree or disagree that:

"I found it easy to decide which deal to switch my electricity to"

	All	Age			Social Grade		Internet Access		2010
		15-34	35-64	65+	AB	DE	Yes	No	
Base: All with mains electricity and responsible for bills who have ever switched electricity supplier	*(587) %*	*(84) %*	*(349) %*	*(154) %*	*(169) %*	*(103) %*	*(501) %*	*(86) %*	*(633) %*
Agree	77	80	77	77	71	82	77	79	75
Neither	8	8	8	9	8	7	8	12	11
Disagree	12	10	13	10	18	10	13	8	13
Don't know	2	1	2	3	3	1	2	2	1

Source: Ipsos MORI

Over three-quarters of switchers of either fuel (77% of each) agree that they found it easy to decide which deal to switch to. Both figures indicate a marginal improvement since last year, but this is not statistically significant.

While there is not much variation across the sub-groups, it is the AB and to some extent the C1 social groups which show most disagreement that the choice was easy.

Q20b-2 *"I am confident that I fully understand the key features of the deal I switched to"*

	All	Age			Social Grade		Internet Access		2010
		15-34	35-64	65+	AB	DE	Yes	No	
Base: All with mains gas and responsible for bills who have ever switched gas supplier	*(543) %*	*(80) %*	*(321) %*	*(142) %*	*(171) %*	*(97) %*	*(463) %*	*(76) %*	*(589) %*
Agree	76	75	77	76	76	76	76	77	76
Neither	11	12	9	14	10	12	10	16	10
Disagree	11	12	12	8	13	10	12	7	12
Don't know	1	0	2	1	1	2	2	0	1

Source: Ipsos MORI

Q20b-2 *"I am confident that I fully understand the key features of the deal I switched to"*

	All	Age			Social Grade		Internet Access		2010
		15-34	35-64	65+	AB	DE	Yes	No	
Base: All with mains electricity and responsible for bills who have ever switched electricity supplier	*(587) %*	*(84) %*	*(349) %*	*(154) %*	*(169) %*	*(107) %*	*(501) %*	*(86) %*	*(633) %*
Agree	77	78	78	75	71	83	77	79	78
Neither	9	10	8	10	10	9	9	10	10
Disagree	12	10	12	13	17	7	12	11	11
Don't know	2	1	2	2	2	2	2	0	1

Source: Ipsos MORI

There are similarly high proportions that agree they are confident they fully understand the key features of the deal they last switched to – as last year, nearly eight in ten of both gas and electricity switchers (76% gas; 77% electricity). Just over one in ten disagree in each case, admitting they were not fully confident. Some of the higher proportions disagreeing are indicated to be among gas switchers on standard credit, BME customers and customers in Wales, and among electricity switchers on standard credit, ABs and those in Wales. Only among the ABs, however, is the difference statistically significant.

Overall ease of switching in 2010

Q24c. How did you find the process of switching supplier

	All	**Age**			**Social Grade**		**Internet Access**	
	All	15-34	35-64	65+	AB	DE	Yes	No
Base: All with mains electricity and responsible for bills who switched electricity or gas supplier in 2010	*(276) %*	*(52) %*	*(155) %*	*(69) %*	*(67) %*	*(57) %*	*(236) %*	*(40) %*
Very easy	46	51	45	42	44	44	45	47
Fairly easy	39	32	39	46	40	38	40	38
Neither	7	10	7	4	6	6	6	8
Fairly difficult	2	1	4	0	6	3	3	0
Very difficult	2	0	2	5	1	4	2	0
Don't know	4	5	4	2	4	5	4	4

Source: Ipsos MORI

This new question asks 2010 switchers to evaluate the overall level of difficulty they encountered in switching.

Overall, 85% found switching very or fairly easy, 46% judging it "very" easy. Just 4% judged it to be very or fairly difficult and this proportion varies little across sub-groups in the survey. The most discriminating metric here is probably the proportion rating it as very easy: this is notably higher among standard credit customers, the 15-34 age group, BME customers and those in rented accommodation, though none of these differences are statistically significant.

Household financial stability

Q25. Which of these statements best applies to you?

	Total	Payment Method		Social Grade	Tenure		All	
		PPM (gas)	PPM (elec)	DE	Rented	Non-rented	2008	2010
Base: All with either mains gas or electricity who are responsible for bills	*(1,525) %*	*(163) %*	*(209) %*	*(336) %*	*(348) %*	*(1,174) %*	*(1,539) %*	*(1,554) %*
We are keeping up with all the household bills without any difficulties	62	33	30	46	44	67	70	63
We are keeping up with all the household bills, but it is a struggle from time to time	25	38	41	32	33	23	20	25
We are keeping up with all the household bills, but it is a constant struggle	8	23	21	17	15	7	7	9
We are falling behind with some household bills	1	1	3	2	3	1	1	1
We are having real financial problems and have fallen behind with many bills	1	4	3	1	3	1	2	1

Source: Ipsos MORI

Nearly nine in ten energy customers are able to keep up with household bills, though for 25% it is a struggle from time to time. Just 2% feel they are falling behind.

The proportions placing themselves in each financial group are largely consistent with last year, with no significant continuation of the trend towards falling behind on household bills.

Appendices

Appendices

Sample Profile

Q1 Do you have mains gas and/or mains electricity in your home?				
	All 2007	**All 2008**	**All 2010**	**All 2011**
Base: All respondents	*(2,020)* %	*(2,063)* %	*(1,992)* %	*(1,992)* %
Main gas	78	81	86	85
Mains electricity	94	95	95	94
Neither/Don't know/Refused	5	9	5	3

Source: Ipsos MORI

Q2a Are you responsible or jointly responsible for the gas or electricity bills in your household?				
	All 2007	**All 2008**	**All 2010**	**All 2011**
Base: All with mains gas or electricity	*(1,964)* %	*(1,981)* %	*(1,904)* %	*(1,925)* %
Yes	77	75	80	77
No	23	25	20	23

Source: Ipsos MORI

Q2c Are you on a dual fuel deal?				
	All 2007	**All 2008**	**All 2010**	**All 2011**
*Base: All with mains gas and electricity who are responsible for the bill and have same supplier for both (who comprise 87% of all with mains gas **and** electricity who are responsible for bills (2011))*	*(1,964)* %	*(1,005)* %	*(1,144)* %	*(1,138)* %
Yes	-	64	72	74
No	-	22	16	15

Source: Ipsos MORI

Methods of Payment

Q3a How do you pay for the gas you use?

	All 2007	All 2008	All 2010	All 2011
Base: All those with mains gas who are responsible for the bill	*(1,243)* *%*	*(1,243)* *%*	*(1,369)* *%*	*(1,331)* *%*
Monthly direct debit	62	65	70	70
Pay quarterly in arrears/cheque, cash or card on receipt of bill	23	19	13	14
Prepayment meter	8	10	11	11
Fuel Direct	*	*	*	0
Weekly/fortnightly payment scheme	2	1	1	1
Payment card/book ad hoc	3	3	3	2
Other	1	1	1	1
Don't know	1	1	1	1

Source: Ipsos MORI

Q4a How do you pay for the electricity you use?

	All 2007	All 2008	All 2010	All 2011
Base: All those with mains electricity who are responsible for the bill	*(1,516)* *%*	*(1,519)* *%*	*(1,540)* *%*	*(1,500)* *%*
Monthly direct debit	60	64	68	70
Pay quarterly in arrears/cheque, cash or card on receipt of bill	24	19	15	13
Prepayment meter	9	11	12	12
Fuel Direct	*	*	*	*
Weekly/fortnightly payment scheme	2	2	1	1
Payment card/book ad hoc	3	3	3	2
Other	1	1	*	2
Don't know	1	1	1	1

Source: Ipsos MORI

Online Tariff

Q3b Are you on an online tariff, that is, a gas account you have to manage over the internet?

	2010	2011
Base: All who have mains gas and are responsible for the bill	*(1,369)* %	*(1,331)* %
Yes	12	21
No	85	75
Don't know	3	4

Source: Ipsos MORI

Q4b Are you on an online tariff, that is, an electricity account you have to manage over the internet?

	2010	2011
Base: All who have mains electricity and are responsible for the bill	*(1,540)* %	*(1,500)* %
Yes	12	19
No	85	77
Don't know	3	3

Source: Ipsos MORI

Demographics

	2008 Weighted	2008 Un-weighted	2010 Weighted	2010 Un-weighted	2011 Weighted	2011 Un-weighted
Base: All respondents	*(2,063)* *%*	*(2,063)* *%*	*(1,992)* *%*	*(1,992)* *%*	*(2,000)* *%*	*(1,992)* *%*
Age						
15-34	32	29	32	28	31	28
35-64	48	47	49	48	49	49
65+	20	24	20	24	20	22
Social Group						
AB	26	20	27	19	27	24
C1	29	30	29	35	29	30
C2	21	21	21	22	21	23
D	16	17	16	14	15	13
E	9	12	8	10	8	10
Region						
England	86	84	86	87	86	86
Wales	5	6	5	6	5	7
Scotland	9	10	9	7	9	7
Area						
Urban	27	27	24	26	24	27
Suburban	52	54	59	58	55	54
Rural	21	19	17	16	20	19
Income						
Up to £11,499	15	19	15	18	15	18
£11,500-£24,499	18	18	20	20	17	18
£25,000+	28	15	31	25	30	28
Internet Access						
Yes	72	67	77	73	84	81
No	28	33	23	27	16	19
Ethnic Group						
White	89	90	91	87	91	88
BME	11	10	9	13	9	12

Topline questionnaire

Topline questionnaire

Ofgem Switching Omnibus Questionnaire 2011
Topline Results

- This topline shows the results for a face-to-face survey conducted among a representative quota sample of 1,992 residents of Great Britain in the period 14 - 20 January 2011. Comparisons, where available, are shown with surveys in 2010, 2008 and 2007.
- Data are weighted by sex, age, social class, region and working status
- Where results do not sum to 100, this may be due to multiple responses, computer rounding or the exclusion of don't knows/not stated
- Results are based on all respondents unless otherwise stated (most based on all with gas or all with electricity)
- An asterisk (*) represents a value of less than one half or one percent, but not zero

OF1. **Do you have mains gas and/or mains electricity in your home?**

	March '07	March '08	March '10	January '11
	%	%	%	%
Yes – Mains electricity	95	94	95	94
Yes – Mains gas	81	78	86	85
No – Neither	1	2	2	1
Don't know	1	2	1	1
Refused	*	1	2	1

Base: All respondents (1,992)

Ask if code 1 or 2 at OF1: OTHERS GO TO NEXT SECTION

OF2a **Are you responsible or jointly responsible for the gas or electricity bills in your household?**

	March '07	March '08	March '10	January '11
	%	%	%	%
Yes	77	75	80	77
No	23	25	20	23

Base: All who have mains electricity and/or gas (1,925)

OF2b If code '2' at OF2a GO TO OF26. ASK OF2b IF RESPONDENT HAS **BOTH** ELECTRICITY AND GAS AT OF1 (code 1 AND code 2): Others go to OF2d

OF2b **Do you have the same supplier for both electricity and gas?**

	March '08	March '10	January '11
	%	%	%
Yes	80	84	87
No	17	14	12
DK/Not sure	3	2	2

Base: All who have both mains electricity and gas, and are responsible for bills (1,306)

OF2c ASK IF CODE '1' AT OF2b

OF2c **IF YES: Are you on a dual fuel deal?**

	March '08	March '10	January '11
	%	%	%
Yes	64	72	74
No	22	16	15
DK/Not sure	14	12	11

Base: All with same supplier for both fuels (1,138)

OF2d ASK ALL RESPONSIBLE OR JOINTLY RESPONSIBLE FOR BILLS (Code 1 at OF02a)

OF2d **IF YES: In the last year have you received clearer information from your supplier about:**

		January '11
		%
The name of the tariff you are on?	Yes	42
	No	40
	DK/Not sure	18
Any changes to your tariff?	Yes	45
	No	44
	DK/Not sure	11
The forecast of your energy consumption over the coming year?	Yes	45
	No	44
	DK/Not sure	11

Base: All responsible or jointly responsible for bills (1,525)

Ask OF3a if code ‘2’ at OF1 and code ‘1’ at OF2a

OF3a **How do you pay for the gas you use?**

	March ‘07	March ‘08	March ‘10	January ‘11
	%	%	%	%
Monthly Direct Debit	62	65	70	70
Pay by cheque, cash or card on receipt of quarterly bill (“Pay quarterly in arrears” – March ’07)	23	19	13	14
Prepayment Meter	8	10	11	11
Fuel Direct (where a set amount is deducted from your benefits before you receive them)	*	*	*	-
Weekly/Fortnightly payment scheme	2	1	1	1
Payment card/book that I use whenever I choose (Ad Hoc)	3	3	3	2
Other	1	1	1	1
Don’t know	1	1	1	1

Base: All with mains gas and responsible for bill (1,331)

OF3b ASK IF CODE ‘2’ AT 0F1 AND CODE ‘1’ AT OF02A

OF3b **Are you on an online tariff, that is, a gas account you have to manage over the internet?**

	March ‘10	January ‘11
	%	%
Yes	12	21
No	85	75
Don’t know	3	4

Base: All those who have mains gas in their home and are responsible for the bill (1,331)

ASK OF4a IF CODE ‘1’ AT OF1 AND CODE ‘1’ AT OF2A

OF4a **How do you pay for the Electricity you use?**

	March ‘07	March ‘08	March ‘10	January ‘11
	%	%	%	%
Monthly Direct Debit	60	64	68	70
Pay by cheque, cash or card on receipt of quarterly bill (“Pay quarterly in arrears” – March ’07)	24	19	15	13
Prepayment Meter	9	11	12	12
Fuel Direct (where a set amount is deducted from your benefits before you receive them)	*	*	*	*
Weekly/Fortnightly payment scheme	2	2	1	1
Payment card/book that I use whenever I choose (Ad Hoc)	3	3	3	2
Other	1	1	*	2
Don’t know	1	1	1	1

Base: All with mains electricity and responsible for bill (1500)

ASK OF04b IF CODE ‘1’ AT OF01 AND CODE ‘1’ AT OF02a

OF4b **Are you on an online tariff, that is, an electricity account you have to manage over the internet?**

	March ‘10	January ‘11
	%	%
Yes	12	19
No	85	77
Don’t know	3	3

ASK OF5 IF CODE ‘2’ AT OF1 AND CODE ‘1’ AT OF2A: OTHERS GO TO OF10

OF5. **Did you switch your gas supplier during 2010?**

	March ‘07	March ‘08	March ‘10	January ‘11
	%	%	%	%
Yes	19	20	17	15
No/Don’t know	81	80	83	85

Base: All with mains gas and responsible for bill (1331)

ASK OF6 IF CODE '1' AT OF5: OTHERS GO TO OF7

OF6. **If yes – how many times did you switch your gas supplier during 2010?**

	March '08	March '10	January '11
	%	%	%
Once	87	86	94
Twice	11	12	5
Three times or more	2	2	1

Base: All switched gas supplier in 2010 (204)

ASK IF NOT SWITCHED GAS SUPPLIER DURING 2010 (CODE '2' AT OF5): OTHERS GO TO OF8

OF7. **Did you switch your gas supplier before 2010?**

	March '07	March '08	March '10	January '11
	%	%	%	%
Yes	22	29	32	30
No	78	71	68	70

Base: All who did not switch gas supplier during 2010 (1,127)

ASK IF YES AT OF5 OR OF 7

OF8. **How many times have you ever switched your gas supplier?**

	March '08	March '10	January '11
	%	%	%
Once	53	49	56
Twice	26	26	21
Three times or more	21	25	23

Base: All ever switched gas supplier (543)

ASK OF9 IF CODE 2 AT OF5: OTHERS GO TO OF10

OF9. **Even though you stayed with the same gas supplier during 2010, did you change the tariff you have with them or the method by which you pay them? [INTERVIEWER NOTE: This should only include changes instigated by the respondent - not those where the supplier, for example, changed the name of a tariff]**

	March '08	March '10	January '11
	%	%	%
Yes	9	10	12
No	88	88	84
Don't Know	4	2	4

Base: All not switched gas supplier in 2010 (1,127)

ASK IF CODE ‘1’ AT OF1 AND CODE ‘1’ AT OF2A: OTHERS GO TO OF15

OF10. **Did you switch your electricity supplier during 2010?**

	March ‘07	March ‘08	March ‘10	January ‘11
	%	%	%	%
Yes	22	19	18	17
No	78	81	82	83

Base: All who have mains electricity and are responsible for bill (1,500)

ASK IF CODE ‘1’ AT OF10: OTHERS GO TO OF12

OF11. **If yes – how many times did you switch your electricity supplier during 2010?**

	March ‘08	March ‘10	January ‘11
	%	%	%
Once	82	82	87
Twice	15	13	8
Three times or more	2	5	5

Base: All switched electricity supplier in 2010 (254)

ASK IF NOT SWITCHED ELECTRICITY DURING 2009. (ASK IF CODE ‘2’ AT OF10 : OTHERS GO TO OF13)

OF12. **Did you switch your electricity supplier before 2010?**

	March ‘07	March ‘08	March ‘10	January ‘11
	%	%	%	%
Yes	21	26	30	28
No	79	74	70	72

Base: All those who did not switch electricity supplier during 2010 (1,246)

ASK IF YES AT OF10 OR OF12

OF13 **How many times have you ever switched your electricity supplier?**

	March ‘08	March ‘10	January ‘11
	%	%	%
Once	55	46	56
Twice	23	27	20
Three times or more	22	26	24

Base: All ever switched electricity supplier (587)

ASK OF14 IF CODE 2 AT OF10: OTHERS GO TO OF15

OF14 **Even though you stayed with the same electricity supplier during 2010, did you change the tariff you have with them or the method by which you pay them? [INTERVIEWER NOTE: This should only include changes instigated by the respondent - not those where the supplier, for example, changed the name of a tariff]**

	March ‘08	March ‘10	January ‘11
	%	%	%
Yes	8	8	10
No	89	89	86
Don’t Know	4	2	3

Base: All not switched electricity supplier in 2010 (1,246)

Summary 1

	March ‘07	March ‘08	March ‘10	January ‘11
	%	%	%	%
Ever switched gas supplier	37	43	43	41
Ever switched electricity supplier	39	40	42	40

Base: All who have each fuel and pay bills (1331 gas, 1500 electricity)

Summary 2

	March ‘07	March ‘08	March ‘10	January ‘11
	%	%	%	%
Switched either fuel in last year	24	21	19	18
Switched either fuel ever	41	45	46	43

Base: All with either fuel and pay bills (1,525)

ASK IF (ELEC BILL PAYER AND NEVER SWITCHED ELEC SUPPLIER [OF1 code 1 + OF2a code 1 + OF10 code 2 + OF12 code 2]) OR (GAS BILL PAYER AND NEVER SWITCHED GAS SUPPLIER [OF1 code 2 + OF2a code 1 + OF5 code 2 + OF7 code 2]):Others go to OF17

OF15 If never switched either: **Did you know it was possible to switch to a different gas/electricity supplier?**

	March ‘08	March ‘10	January ‘11
	%	%	%
Yes	80	83	87
No	16	14	10
Not sure	4	4	3

Base: All never switched either (875)

BASE SAME AS OF15: ASK IF (ELEC BILL PAYER AND NEVER SWITCHED ELEC SUPPLIER [OF1 code 1 + OF2a code 1 + OF10 code 2 + OF12 code 2]) OR (GAS BILL PAYER AND NEVER SWITCHED GAS SUPPLIER [OF1 code 2 + OF2a code 1 + OF5 code 2 + OF7 code 2]):Others go to OF17

OF16 **For each of the items on this card could you please say which of them apply to you?**

	January '11
	%
I'm happy with my current supplier/s	77
I've checked prices of other suppliers and I am already on a good deal	13
I don't think there is much difference between the suppliers to make switching worthwhile	20
Switching is a hassle	22
I am unsure about where to get information to help me make a good choice	4
I am in debt with my current supplier/s so don't think I would be able to switch	1
I live in a rented house and don't think my landlord would allow me to switch	3
I wouldn't know how to go about switching even if I wanted to	2
None of these	3

Base: All never switched either (875)

ASK OF17 IF RESPONDENT HAS MAINS GAS AND IS RESPONSIBLE FOR BILLS AND HAS SWITCHED GAS SUPPLIER EVER. (OF1 code 2 and OF2a code 1 and Code ‘1’ at either at OF5 or OF7)

OF17. **Thinking about the <u>last time</u> you switched your gas supplier, what was the main trigger causing you to switch?**

	March ‘07	March ‘08	March ‘10	January ‘11
	%	%	%	%
Believed new supplier to be cheaper/to save money	76	78	78	79
Believed new supplier offered better service	9	6	6	7
Believed new supplier displayed greater corporate responsibility	*	1	-	-
Wanted to switch to a dual fuel package	5	3	6	4
Wanted to switch to a fixed-price deal	1	2	3	1
Wanted to switch to a social offering	0	0	-	-
Wanted to switch to a “greener”, environmentally friendly tariff or supplier	*	1	1	1
Wanted to switch to an online tariff*	-	0	*	1
Bad experience in the past#	-	-	-	1
Made a mistake#	-	-	-	1
Price/ good deal/ special offer#	-	-	-	1
Sales Pressure#	-	-	-	*
Sales in the shop/ supermarket#	-	-	-	-
Doorstep canvas#	-	-	-	-
Moved house#	-	-	2	2
Billing problems#	-	-	1	-
Other	7	7	1	1
Don’t know	2	2	2	2

Base: All ever switched gas supplier (543)
added at coding stage
OF18 Deleted

ASK OF19A IF RESPONDENT HAS MAINS GAS AND IS RESPONSIBLE FOR BILLS AND HAS SWITCHED GAS SUPPLIER EVER (OF1 code 2 and OF2a code 1 and Code ‘1’ at either at OF5 or OF7)

OF19a **Thinking about the last time you switched gas supplier, how did you find out about the deals offered by the supplier you switched to? [do not prompt]**

	March ‘08	March ‘10	January ‘11
	%	%	%
They knocked on my door	41	33	31
Used an on-line/website price comparison service (e.g. USwitch, Money Supermarket)	21	26	21
They phoned me	7	8	7
I spoke to a salesperson in street/shopping centre/public place	-	7	7
A friend or family member told me about it	6	7	6
I saw an advert	11	5	4
I phoned a comparison service	-	4	7
I looked at the websites of more than one supplier	-	4	3
I rang them	5	2	3
I looked at the supplier’s own website (not a comparison website)	-	1	4
I rang them and other suppliers	4	1	2
Other	6	5	5
Don’t know	4	3	4

Base: All ever switched gas supplier (538)

OF19b **Thinking about the last time you switched gas supplier, how did you switch? [do not prompt]**

	January '11 %
Via an on-line price comparison site	16
By phoning a price comparison service	2
By phoning the supplier	25
On the supplier's website	4
Via another website (that wasn't a price comparison site or the suppliers' website)	1
With a salesperson who knocked on my door	29
With a salesperson who phoned me	8
With a salesperson in the street/shopping centre/other public place	6
By letter/ mail	1
Contacted Age UK	*
Other	2
Don't know	6

ASK OF20a IF OF17 is code 1 (SWITCHED GAS SUPPLIER TO SAVE MONEY): Others go to OF20b

OF20a **To the best of your knowledge, do you feel that you are now paying less than you would have if you hadn't switched?**

	March '08 %	March '10 %	January '11 %
Yes	64	64	62
No	20	14	12
Don't know/Not sure	15	22	26

Base: All ever switched gas supplier to save money (432)

ASK OF20b IF RESPONDENT HAS MAINS GAS AND IS RESPONSIBLE FOR BILLS AND HAS SWITCHED GAS SUPPLIER EVER (OF01 CODE 2 AND OF02A CODE 1 AND CODE ‘1’ AT EITHER OF05 OR OF07)

OF20b_1 SHOWCARD **How much do you agree or disagree with the following statements:** READ OUT

I found it easy to decide which deal to switch my gas to

	March ‘10	January ‘11
	%	%
Agree strongly	29	32
Tend to agree	43	45
Neither agree nor disagree	13	8
Tend to disagree	9	10
Disagree strongly	4	3
Don’t know	1	2

Base: All with gas who have ever switched (543)

OF20b_2 ***I am confident that I fully understand the key features of the deal I switched to***

	March ‘10	January ‘11
	%	%
Agree strongly	31	35
Tend to agree	45	41
Neither agree nor disagree	10	11
Tend to disagree	9	8
Disagree strongly	4	4
Don’t know	1	1

Base: All with gas who have ever switched (543)

ASK OF21 IF RESPONDENT HAS ELECTRICITY AND IS RESPONSIBLE FOR BILLS AND HAS SWITCHED ELECTRICITY SUPPLIER EVER (OF1 code 1 and OF2a code 1 and Code '1' at either OF10 or OF12)

OF21 **Thinking about the last time you switched your electricity supplier, what was the main trigger causing you to switch?**

	March '07	March '08	March '10	January '11
	%	%	%	%
Believed new supplier to be cheaper/to save money	71	77	77	77
Believed new supplier offered better service	10	6	7	7
Wanted to switch to a dual fuel package	7	4	6	5
Wanted to switch to a fixed-price deal	3	2	4	2
Moved house#	-	-	2	3
Wanted to switch to a "greener", environmentally friendly tariff or supplier	1	2	1	2
Believed new supplier displayed greater corporate responsibility#	1	1	-	-
Wanted to switch to a social offering#	*	0	-	-
Bad experience in the past#	-	-	-	*
Made a mistake#	-	-	-	*
Price/ good deal/ special offer#	-	-	-	1
Sales Pressure#	-	-	-	1
Sales in the shop/ supermarket#	-	-	-	-
Doorstep Canvas#	-	-	-	-
Wanted to switch to an online tariff	-	0	*	*
Other	5	6	1	1
Don't know	3	2	1	2

Base: All ever switched electricity supplier (587)
* 2008 wording: "The attraction of an online tariff"
# added at coding stage

Ask OF23a IF RESPONDENT HAS ELECTRICITY AND IS RESPONSIBLE FOR BILLS AND HAS SWITCHED ELECTRICITY SUPPLIER EVER (OF1 code 1 and OF2a code 1 and Code '1' at either OF10 or OF12)

OF23a. **Thinking about the last time you switched electricity supplier, how did you find out about the deals offered by the supplier you switched to? [do not prompt]**

	March '08	March '10	January '11
	%	%	%
Used an on-line/website price comparison service (e.g. USwitch, Money Supermarket)	22	27	24
I phoned a comparison service	-	3	5
I looked at the supplier's own website (not comparison website)	1	2	4
I looked at the websites of more than one supplier	-	3	2
They knocked on my door	41	34	29
I spoke to a salesperson in street/shopping centre/public place	-	6	7
They phoned me	6	8	9
I saw an advert	12	4	5
I rang them	4	2	4
I rang them and other suppliers	3	2	2
A friend or family member told me about it	5	7	6
Other	6	6	5
Don't know	5	2	4

Base: All ever switched electricity supplier (582)

OF23b **Thinking about the last time you switched electricity supplier, how did you switch? [do not prompt]**

	January '11 %
Via an on-line price comparison site	16
By phoning a price comparison service	2
By phoning the supplier	28
On the supplier's website	5
Via another website (that wasn't a price comparison site or the suppliers' website)	1
With a salesperson who knocked on my door	28
With a salesperson who phoned me	8
With a salesperson in the street/shopping centre/other public place	5
By letter/ post	1
Contacted Age UK	*
Family/ friend arranged it	*
Other	1
Don't know	6

Base: All those who have mains electricity and are responsible for the bill and who have ever switched supplier (587)

ASK OF24 IF OF21 is code 1 (SWITCHED ELECTRICITY SUPPLIER TO SAVE MONEY): Others go to OF24b

OF24a **To the best of your knowledge, do you feel that you are now paying less than you would have if you hadn't switched?**

	March '08 %	March '10 %	January '11 %
Yes	62	67	64
No	24	12	11
Don't know/Not sure	15	21	25

Base: All ever switched electricity supplier to save money (461)

ASK OF024B IF RESPONDENT HAS ELECTRICITY AND IS RESPONSIBLE FOR BILLS AND HAS SWITCHED ELECTRICITY SUPPLIER EVER (OF01 CODE 1 AND OF02A CODE 1 AND CODE '1' AT EITHER OF10 OR OF12)

OF24b_1 SHOWCARD **How much do you agree or disagree with the following statements:** READ OUT
I found it easy to decide which deal to switch my electricity to

	March '10	January '11
	%	%
Agree strongly	31	31
Tend to agree	43	46
Neither agree nor disagree	11	8
Tend to disagree	9	8
Disagree strongly	4	3
Don't know	1	2

(SP) Base: All with electricity who have ever switched (587)

OF24b_2 ***I am confident that I fully understand the key features of the deal I switched to***

	March '10	January '11
	%	%
Agree strongly	32	34
Tend to agree	46	44
Neither agree nor disagree	10	9
Tend to disagree	8	8
Disagree strongly	3	4
Don't know	1	2

(SP) Base: All with electricity who have ever switched (587)

ASK Q24c OF ALL WITH GAS OR ELECTRICITY WHO ARE RESPONSIBLE FOR BILLS AND WHO HAVE SWITCHED EITHER IN 2010 (OF01 code 1 or 2+ OF02a Code 1 and CODE 1 AT OF5, OF7, OF10 **OR** OF12)

OF24c **How did you find the process of switching supplier?**

	January '11
	%
Very easy	46
Fairly easy	39
Neither easy nor difficult	7
Fairly difficult	2
Very difficult	2
Don't know	4

Base: all with gas or electricity who switched during 2010 (276)

ASK ALL WITH MAINS GAS/ELEC AND RESP FOR BILLS (OF1 CODES 1 OR 2 AND OF2A CODE 1)

OF25 **Which of these statements best applies to you?**

	March '08	March '10	January '11
	%	%	%
I am/we are keeping up with all the household bills without any difficulties	70	63	62
I am/we are keeping up with all the household bills, but it is a struggle from time to time	20	25	25
I am/we are keeping up with all the household bills, but it is a constant struggle	7	9	8
I am/we are falling behind with some household bills	1	1	1
I am/we are having real financial problems and have fallen behind with many bills	2	1	1
Don't know	0	2	2

Base: All with mains electricity or gas and responsible for bills (1,525