Ipsos MORI

June 2014

Customer Engagement with the Energy Market: Tracking Survey 2014

Report prepared for Ofgem

Contents

1 Introduction and Methodology

1.1 Preface

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 provide an up-to-date understanding of consumer engagement with the GB energy market, including switching rates, engagement with bills and other communications, and trust in energy suppliers. Where possible, this report includes year-on-year comparisons with the previous surveys in March 2013, March 2012, January 2011 and March 2010, though there are some questionnaire changes during that period. There have been no substantive questionnaire changes since 2013.[1]

The research vehicle chosen was Ipsos MORI's weekly omnibus survey, known as the Capibus, for which the fieldwork dates were 7-17 March 2014, achieving 1,971 computer-assisted personal interviews.

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

1.2 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[2] 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.

1.3 Quality control

We employ the strictest quality control procedures. 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 is approx 26 minutes) and the time taken over individual questions in the questionnaire.

1.4 Data processing

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

1.5 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.

[1] Except for additional explanation of fixed term tariffs at Question 7

[2] A Classification Of Residential Neighbourhoods: is a geodemographic segmentation of the UK's population. It segments households, postcodes and neighbourhoods into 6 categories, 18 groups and 62 types. By analysing significant social factors and population behaviour, it provides precise information and an in-depth understanding of the different types of people

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 1,971 interviews, most of the figures in this report are based on 1,227 gas customers and 1,393 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.

NOTE: Figures in the tables will not always add to 100%, either because of multiple answers being allowed, or because of rounding. This may particularly affect rating scales where the “net” of, for example, “very” and “fairly” will not add exactly to the combined “very/fairly” figure. The difference should not, however, be more than one percentage point.

Tables are headed by actual question wordings and a question number, which relates to the full questionnaire in the appendix to this report.

Any findings referred to which are not shown in the tables are all available in the original copy of the computer tabulations held by Ofgem.

Ref: 14-013007

2 Summary

2.1 Switching supplier

- The incidence of switching gas supplier during 2013 is up two percentage points to 13%, and the incidence of switching electricity supplier is up one point, and is also 13%. Neither increase is statistically significant, and both must be treated with some caution. Nevertheless, this represents the first time reported switching rates have stabilised since 2008, when switching for both fuels began its year-on-year decline.

- At the same time as the interruption to the downward trend in switching rates there have been some changes in the pattern of switching by sub-groups. In general terms, those on direct debit payment, aged under 65 and own their homes remain most likely to have switched either fuel. On the other hand, switching is up amongst black and minority ethnic (BME) respondents (bringing them level with the remainder of the population). Those with a physical or mental impairment now show an annual switching rate that is not notably different to the wider population.

- The proportions who say they have ever switched their gas or electricity supplier have increased for the second year in succession, particularly in the case of gas which is up four points to 42%, compared to 39% among electricity customers. The profile of non-switchers is more likely to include customers on standard credit, PPM (to some extent), the 65+ age group, social grades C2DE, those from BME groups, and those who rent their homes.

2.2 Switching tariff or method of payment

- Switching of tariff or payment method with the current supplier has been maintained at broadly the same rate as last year, though among electricity customers it is down a marginal two points. Those now on direct debit, aged 35-64, from higher social grades (especially those in grades AB), those who own their homes and those with internet access are most likely to have switched their tariff or payment type.

- Most switching of tariff, or indeed switching of supplier, does not involve a change in the method of payment.

- The main trigger for tariff or method of payment change (among those who did not switch supplier in 2013) is the belief they would save money, though secondary triggers can also be observed, notably moving home, wanting to move to a fixed price deal or because a fixed price deal ended. Online price comparison services continue to be the main information source for tariff or method of payment switching. Calling the supplier is declining in importance as a source of information, but written communications are growing in significance. The actual switch of tariff or payment method is, however, most likely to be made by phoning the new supplier, though use of supplier websites and written communications to make tariff switches are showing signs of growing.

2.3 Awareness and perceptions of switching supplier, tariff or payment method

- Among those who never switched supplier, awareness that it is possible to do so is stable at 84%. Those still unaware comprise 9% of all energy customers[3]. These are primarily people on PPMs, standard credit or quarterly direct debit, social grades C2, D and E, those from BME groups and those who rent their homes. They also comprise disproportionately of those who are falling behind or occasionally struggle to pay their household bills.

- Whilst being *happy with current supplier* remains the most popular reason for not switching, there has been a two-year rise in the proportions holding the belief that *switching is a hassle* and *I don't think there's any difference between suppliers to make switching worthwhile* (up ten and eight points since 2012, respectively).

- Those who have never switched consider they would need to save a minimum of £158 on average (median amount £99) by switching supplier to be encouraged to do so. Both figures are marginally up (by £5) on last year.

- Awareness that it is possible to switch tariff or method of payment, at 81% of those who did not change tariff or payment method in 2013/14, is consistent with last year's survey, still well above the level of 2012. Those unaware are more likely to be from a variety of potentially more vulnerable groups, including social grade E and the BME group.

2.4 Experience of switching supplier

- While the belief that a new supplier will be cheaper is still the primary trigger for switching supplier, the roles of two secondary triggers are growing marginally: moving home and the desire for a fixed price deal. The dominance of online price comparison services as the main source of information for switching decisions has grown, while the use of doorstep supplier representatives has fallen further. There are many secondary sources of information, including now collective switching schemes, though these are mentioned by only 2% of switchers.

- Online price comparison services have moved slightly ahead of phoning the supplier as the main method of making the actual switch. Use of such services continues to be more likely amongst customers on direct debit, social grade AB and those with internet access.

- On the last occasion, switchers expected to save £167 on average (a median of £111). The mean is down compared to last year (by £28), but the median figure is up by £11. As in 2013, 11% said the switch was *not about saving money*.

- Seven in ten switchers continue to believe they are now paying less than if they had not switched; this shows only marginal improvement, more so for electricity switchers. A majority found it easy to decide which deal to switch to, especially in electricity. An even greater majority (over three-quarters) say they are confident they fully understand the key features of the deal they switched to.

[3] All energy consumers = all surveyed with mains electricity and/or gas who are responsible (solely or jointly) for paying household gas or electricity bills

Over seven in ten, as in 2013, are confident they would make the right choice for them if they switched again. In the case of electricity switching this proportion is up a marginal five points.

2.5 Attitudes to tariff choices available

- The last year has seen significant improvement in customers' evaluation of the perceived difficulty of comparing tariffs. The proportion rating it as very or fairly easy is up six points to 42%, outweighing the proportion rating it as very or fairly difficult (32%, down five points). Reasons given for perceived difficulty are a little more specific this year, though general comments about confusing tariffs/difficult to understand are still the most common answer. There is greater emphasis on the perceived inability to compare like with like this year, but fewer spontaneous mentions of there being too many tariffs.

- Conversely, when prompted, a majority (62%) indicate they continue to believe there are too many energy tariffs available; the same proportion as last year. Those groups that could be considered vulnerable are among those most likely to respond with *don't know* to this question, for example, 21% of those in social grade E responded with don't know.

2.6 Information and communication from suppliers

- There have been significant increases in the proportions of energy customers who recall receiving information about the name of the tariff they are on (up five points) and the forecast cost of their energy consumption (up five points). Information on both the tariff name and forecast cost is now recalled by a majority of energy customers (59% and 52% respectively).

- Recall of receiving annual statements, bills or statements of account and end of fixed term letters are all slightly up on last year. Receipt of the last of these is measured among those who are self-identified as being on a fixed term tariff, a phrase which, despite a more informative question wording this year, still appears to be misunderstood by many respondents.[4] Among those not on fixed tariffs for both fuels 59% recall receiving a price increase notification letter, three points lower than last year.

- End of fixed term letters apparently continue to give rise to the most detailed reading, though the attention paid to annual statements and bills or statements of account is also up a little this year. Price increase notification letters are marginally less likely to have been read in detail this year.

- The end of fixed term letter continues to be apparently the most effective call to action of the four types of communication. Just over half (51%) of those who say they received one said they took action as a result. This includes looking into switching, or actually switching supplier, tariff or payment method. Though not as effective as an end of fixed term letter in this respect, the annual statement is fairly effective at prompting consumers to consider their own energy needs.

2.7 Trust in energy suppliers

- Distrust in energy suppliers to be open and transparent in their dealings with customers (44%) continues to outweigh trust (28%), though there has been no significant worsening of this position over the past year. In fact the proportion who distrust suppliers "completely" is down three points since last year to 15%. Only a few sub-groups, mostly among those who may be more vulnerable,

[4] This year the question included the sentence "A fixed term tariff is a tariff that has a definite end date" to help clarify what it means. The proportion believing they are on a fixed term tariff nevertheless rose from last year's 53% to 56%, both of which are likely to be too high (i.e. based on Ofgem monitoring data).

trust the energy industry on balance. This includes social grade E, those from BME groups and those with no internet access, but also includes quarterly direct debit payers.

3 Incidence of switching

3.1 Switched supplier in last year

Q12a. Did you switch your gas supplier in 2013?

	All 2014	Payment method			Ethnicity		Tenure		Previous survey years (all)		
		Monthly/ Quarterly Direct debit	Standard credit	PPM (gas)	White	BME	Rented	Not rented	2011	2012	2013
Base: All with mains gas who are responsible for the bill	*(1227)* %	*(875)* %	*(118)* %	*(172)* %	*(1099)* %	*(121)* %	*(353)* %	*(874)* %	*(1331)* %	*(1232)* %	*(1214)* %
Yes	13	14	7	11	13	15	10	14	15	13	11
No/ Don't know	87	86	93	89	87	85	90	86	85	87	89

Source: Ipsos MORI

Q16a. Did you switch your electricity supplier in 2013?

	All 2014	Payment method			Ethnicity		Tenure		Previous survey years (all)		
		Monthly/ Quarterly Direct debit	Standard credit	PPM (elec)	White	BME	Rented	Not rented	2011	2012	2013
Base: All with mains electricity who are responsible for the bill	*(1383)* %	*(962)* %	*(138)* %	*(223)* %	*(1250)* %	*(126)* %	*(406)* %	*(977)* %	*(1500)* %	*(1461)* %	*(1408)* %
Yes	13	15	8	8	13	14	9	14	17	14	12
No/ Don't know	87	85	92	92	87	86	91	86	83	86	88

Source: Ipsos MORI

The proportion of gas customers and of electricity customers who have switched supplier in 2013 is 13%. The previous decline in the incidence of switching gas supplier, seen in each of the last four surveys, has been arrested in favour of a two-point increase, returning to the level reported in 2012[5]. In the case of switching electricity supplier, the previous decline extended over five surveys, but, this year, has levelled

[5] Where respondents were asked about their switching activity during the previous year, 2011

out with a one-point increase since 2013[6]. Neither improvement is statistically significant and both must be treated with caution.

While switching rates continue to be higher for both fuels among direct debit customers compared to other payment methods, there has been a marginal increase among customers with gas PPMs (up four points), though this is not reflected among electricity PPM customers. But most notable of all is the increase in switching among those from BME groups in both gas and electricity (both are up 11 percentage points since 2013).

Those in rented accommodation remain less likely than others to have switched either fuel (despite a marginal three-point increase in gas switching among renters). The 65+ age group also still lag below the national aggregate for each fuel.

Gas switching is down 10 points in Wales (to 4%) but up eight points (to 17%) in Scotland. For electricity the direction of trends is the same though less dramatic: electricity switching is up six points in Scotland (to 16%) and down four points in Wales (to 7%). Both have fairly small sub-sample sizes, however, especially Wales, so the figures there are subject to some volatility, but it seems evident that Wales is trailing behind England and Scotland in recent switching, a trend not noted before.

By social grade, it is apparent that most growth in switching has been at either end of the scale, though the changes are mostly within sampling error – gas switching is up a marginal four points among social grade AB and nine points among grade E; electricity switching is up a marginal five points among ABs and a similarly marginal three points among grade E. Other social grades show very little change.

The incidence of switching either fuel among those with a long term physical or mental impairment is not statistically different to those with no such condition – there is now only a one-point difference for both fuels, having been four points behind the wider population for both fuels last year.

Q12a/16a. Did you switch your supplier in 2013? - Effect of Internet Access

	Q12a. Gas Internet Access			Q16a. Electricity Internet Access		
	All 2014	Yes	No	All 2014	Yes	No
Base: All with each fuel who are responsible for the bills	*(1227) %*	*(1059) %*	*(168) %*	*(1383) %*	*(1183) %*	*(200) %*
Yes	**13**	14	7	**13**	14	7
No	**87**	86	93	**87**	86	93

Source: Ipsos MORI

Internet access continues to rise at a rate of two percentage points per year[7]. Nine out of ten energy consumers (89%) now report they have access to the internet. But while those with internet access remain much more likely to have switched in the past year, there has been increased switching among

[6] Where respondents were asked about their switching activity during the previous year, 2012
[7] The broader trend of increasing internet penetration is confirmed in the Ipsos MORI Tech Tracker: http://www.ipsos-mori.com/researchspecialisms/ipsosmediact/customresearch/technology/techtracker.aspx

those with no access. The differential with those who have no access has fallen a little – for example gas customers who are on the internet are now twice as likely to have switched as those who are not, while last year they were three times as likely. Nevertheless, the proportions of energy customers who are on an online tariff continue to grow. Online tariffs are now reported to be used by 31% of gas customers and 29% of electricity customers (both up four points in a year).

3.2 Ever switched supplier

Q12a/12b/13. Summary Table – Ever switched gas supplier (to March 2014)

	All 2014	Payment method			Social grade		Ethnicity		Tenure		Previous survey years (all)		
		Monthly/ Quarterly Direct debit	Standard credit	PPM (gas)	AB	DE	White	BME	Rented	Not rented	2011	2012	2013
Base: All with mains gas who are responsible for the bill	*(1227) %*	*(875) %*	*(118) %*	*(172) %*	*(274) %*	*(297) %*	*(1099) %*	*(121) %*	*(353) %*	*(874) %*	*(1,331) %*	*(1,232) %*	*(1,214) %*
Yes	**42**	47	23	33	51	34	43	31	26	47	41	37	38
No/DK	**58**	53	77	67	49	66	57	69	74	53	59	63	62

Source: Ipsos MORI

Q16a/16b/17. Summary Table – Ever switched electricity supplier (to March 2014)

	All 2014	Payment method			Social grade		Ethnicity		Tenure		Previous survey years (all)		
		Monthly/ Quarterly Direct debit	Standard credit	PPM (elec)	AB	DE	White	BME	Rented	Not rented	2011	2012	2013
Base: All with mains electricity who are responsible for the bill	*(1383) %*	*(962) %*	*(138) %*	*(223) %*	*(301) %*	*(351) %*	*(1250) %*	*(126) %*	*(406) %*	*(977) %*	*(1,500) %*	*(1,461) %*	*(1,408) %*
Yes	**39**	45	23	31	49	30	40	25	23	45	40	35	38
No	**61**	55	77	69	51	70	60	75	77	55	60	65	62

Source: Ipsos MORI

For the second year in succession, the proportion of customers who say they have ever switched supplier to date has increased: it is up a significant four points for gas (to 42%) and one point for electricity (to 39%). Within these, the proportion of the most frequent switchers has grown further. The proportion of gas switchers who have switched four times or more is marginally up three points to 20%, while among electricity switchers the corresponding proportion is up a significant six points to 22%. First time switchers continue to see a marginal decline for gas (to 37%) and a substantial (seven-point) decline for electricity to 35%. This suggests there is still a continued concentration of regular switchers (who accumulate more switches year on year), but that does not preclude some new first-time switchers being added, so the pool of 'ever switched' is growing slowly at the same time.

Energy customers who have never switched are more likely to pay by standard credit, or payment card in the case of gas (very small sub-sample). While they are now less likely to be PPM customers than Standard Credit, PPM customers remain more strongly represented among the never switched group than those on direct debit. Those who have never switched are also more likely to be from the 15-34 or, to a lesser extent, the 65+ age groups, from the C2DE social grades, from BME groups and from Wales rather than England or Scotland (in the case of gas customers, though the sample in Wales is too small to be conclusive). They are also more likely to be customers who rent their homes and to be those who are falling behind on their bills or to have financial problems.

By contrast, the proportion who have ever switched supplier are more likely to pay by direct debit, to be from the professional and managerial AB social grades, from the white ethnic group and to own their homes. Those who have ever switched gas supplier are more prevalent in England than in Scotland or Wales. Those who have ever switched are much more likely to have internet access. In contrast to previous surveys, there is no significant difference between the proportions of switchers in urban and rural areas. Long term physical or mental impairment also makes no difference to the propensity to have switched.

3.3 Switching tariffs or payment method

Q15a. Even though you stayed with the same gas supplier in 2013 and so far in 2014, did you change the tariff you have with them or the method by which you pay them?

	All 2014	Current Payment method			Social grade		Age			Tenure		Previous survey years (all)	
		Monthly/ Quarterly Direct debit	Standard credit	PPM (gas)	AB	DE	15-34	35-64	65+	Rented	Not rented	2012	2013
Base: All who did not switch gas supplier in 2013/14	*(1043) %*	*(728) %*	*(110) %*	*(150) %*	*(211) %*	*(257) %*	*(211) %*	*(536) %*	*(296) %*	*(309) %*	*(734) %*	*(1075) %*	*(1,063) %*
Yes – tariff	12	16	4	1	15	6	7	15	11	6	15	9	11
Yes – payment method	4	3	2	7	1	3	4	5	1	3	4	4	5
Yes - changed either	15	18	6	8	15	8	10	18	12	8	17	12	15
No/Don't know	85	82	94	92	85	92	90	82	88	92	83	88	85

Source: Ipsos MORI

Q19a. Even though you stayed with the same electricity supplier in 2013 and so far in 2014, did you change the tariff you have with them or the method by which you pay them?

	All 2014	Current Payment method			Social grade		Age			Tenure		Previous survey years (all)	
		Monthly/ Quarterly Direct debit	Standard credit	PPM (elec)	AB	DE	15-34	35-64	65+	Rent ed	Not rented	2012	2013
Base: All who did not switch electricity supplier in 2013/14	*(1171) %*	*(788) %*	*(126) %*	*(201) %*	*(232) %*	*(311) %*	*(240) %*	*(597) %*	*(334) %*	*(356) %*	*(815) %*	*(1255) %*	*(1234) %*
Yes – tariff	10	14	4	1	14	5	4	12	11	3	13	10	10
Yes – payment method	3	3	3	5	3	4	4	4	2	3	3	3	6
Yes – changed either	13	16	7	5	16	9	9	15	12	6	16	12	15
No/Don't know	87	84	93	95	84	91	91	85	88	94	84	88	85

Source: Ipsos MORI

Tariff switching in both gas and electricity has been maintained at a similar rate to last year – in fact for gas customers it has shown a steady though marginal increase two years running. Switching of payment methods, on the other hand, has declined marginally, especially for electricity customers. It has been responsible for a (again marginal) two-point decline in the combined proportion of tariff or payment method switching among electricity customers – to 13% of those not switching supplier during 2013. Tariff or payment method switching among gas customers is stable at 15%.

Switching of tariff or payment method is significantly higher among those on direct debits, those aged 35-64, social grade AB (plus C1 and C2 in the case of gas), those with internet access and those who do not rent their homes.

Among recent gas supplier switchers, the proportion who switched their payment method at the same time as their supplier has fallen a marginal six points to 9%; among electricity supplier switchers it is down, also marginally, four points to 12%.

Among the total that changed supplier, tariff or payment method in the past year only about a quarter actually changed their payment method. The figures for specific changes in methods are too low to be conclusive; there is a low level of "churn" between different payment methods. Typically, customers may be a little more likely to be switching away from standard credit and quarterly direct debit but solid statistical support for this would require a much larger sample size.

Q33. Thinking about the last time you changed your tariff or payment method (without switching supplier) what was the main trigger causing you to change it?

	All 2014	Social grade				Ethnicity		Previous survey (all)	
		AB	C1	C2	DE	White	BME	2012	2013
Base: All changed tariff/payment method in 2013/14	*(202) %*	*(49) %*	*(66) %*	*(54) %*	*(33) %*	*(185) %*	*(17) %*	*(174) %*	*(219) %*
Believed new tariff or method was cheaper/ to save money	58	56	57	55	70	58	59	62	58
Moved home	9	6	12	9	9	10	-	1	7
Wanted a fixed price deal	6	7	9	5	-	6	4	5	8
Contract/ fixed rate ended	5	9	1	6	-	5	-	-	-
Wanted a dual fuel package	4	1	6	8	-	3	13	3	4
Believed new tariff or method offered better benefits	2	2	-	2	4	2	-	7	6
Wanted an online tariff	2	7	-	-	-	1	11	1	1

Source: Ipsos MORI

As in previous years, the main trigger for switching tariff or payment method is the belief respondents would save money. This dominates all other considerations, but secondary triggers can also be observed, notably moving home, wanting to take advantage of a fixed price deal or simply because a previous fixed price deal ended.

Q34. How did you find out about the tariff or payment method you changed to?

	All	Social Grade				Age			Internet Access		All	
		AB	C1	C2	DE	15-34	35-64	65+	Yes	No	2012	2013
Base: All changed tariff or payment method in 2013/14	(202) %	(49) %	(66) %	(54) %	(33) %	(28) %	(122) %	(52) %	(189) %	(13) %	(174) %	(219) %
Used online/ website price comparison service	**28**	27	32	27	21	12	33	22	28	18	26	24
Written communication or marketing material	**13**	14	8	15	12	7	11	22	13	8	13	7
I rang them (only)	**8**	3	12	12	2	17	7	3	7	14	7	17
Looked at supplier's own website only	**7**	8	8	8	2	12	6	5	7	-	4	4
They phoned me	**6**	8	3	3	10	4	6	5	6	6	8	8
Supplier representative knocked at my door	**6**	6	6	6	6	-	7	7	6	9	12	8
Phoned a comparison service	**6**	2	8	6	12	2	6	8	6	5	7	4
Rang them and other suppliers	**5**	5	6	6	4	10	4	8	5	11	2	5
Looked at websites of more than one supplier	**5**	7	7	4	-	4	7	2	5	-	5	2
Friend or family member told me	**3**	-	5	4	4	7	2	4	3	10	3	4
I saw an advert	**3**	3	1	1	9	13	*	3	3	-	2	4
Spoke to a salesperson in street/ shopping centre	**3**	1	4	3	4	4	2	5	3	6	5	3
Other	**10**	13	8	6	16	8	8	17	10	13	5	8
Don't know	**3**	1	7	3	-	-	4	3	3	-	7	5

Source: Ipsos MORI

Customers who switched tariff or payment method in 2013/14 again used a variety of sources of information to find out about it, but online price comparison services continue to be the main method used. Usage of these online services is distributed across social grades and ethnic groups, though tends to be higher among the 35-64 age group. Although personal internet access facilitates using such online services, it is also the main method used by the (very small number of) switchers who do not have their own internet access. The influence of doorstep sales representatives continues to decline marginally while written communications are more important. Declining significantly is the proportion who found out about the new tariff or payment method by calling their supplier.

Q35. Thinking about the last time you changed your tariff or payment method with your supplier, how did you change it?

	All 2014	Social Grade		Age			Internet Access		Previous survey (all)	
		AB	*DE*	15-34	35-64	65+	Yes	No	2012	2013
Base: All changed tariff or payment method in 2013/14	*(202) %*	*(49) %*	*(33) %*	*(28) %*	*(122) %*	*(52) %*	*(189) %*	*(13) %*	*(174) %*	*(219) %*
Phoning supplier	38	37	24	53	32	43	38	36	34	42
Online price comparison service	21	27	17	13	26	11	21	15	17	20
Through a salesperson who knocked at my door	8	6	17	4	8	9	7	18	11	10
Through suppliers' website	8	9	6	2	10	5	8	-	7	4
Written communications	7	9	10	-	6	13	6	8	6	4
Telephone price comparison service	6	2	12	13	4	6	6	6	7	5
Through a salesperson in street/shopping centre	2	1	-	-	2	3	2	6	3	3
Other	7	6	11	14	6	6	7	13	8	7
Don't know	4	2	3	-	5	3	4	-	7	4

Source: Ipsos MORI

Phoning the new supplier remains the most frequently used method of making the switch in tariff or payment method, though it is down a marginal four points compared to last year. Price comparison services are the second most likely method, though are less popular with the 15-34 age group who prefer to phone the supplier. The use of suppliers' websites and written communication are both up marginally. Though the use of doorstep sales representatives continues to decline each year, they still account for eight percent of tariff switchers.

Q20. Did you know it was possible to change to a different tariff or method of payment with your current supplier?

	Total 2014	Method of Payment (electricity)		Social Grade		Ethnicity		Tenure		Previous survey (all)	
		Quarterly Direct Debit	*PPM (elec)*	C2	DE	White	BME	Rented	Not rented	2012	2013
Base: All who have not changed gas or electricity tariff/payment method in 2013/14	*(1191) %*	*(71) %*	*(207) %*	*(251) %*	*(319) %*	*(1075) %*	*(109) %*	*(375) %*	*(816) %*	*(1139) %*	*(1241) %*
Yes – knew possible to change tariff (only)	**23**	22	19	22	23	23	26	19	25	-	34
Yes – knew possible to change method of payment (only)	**5**	6	6	5	4	5	8	4	5	-	5
Yes – knew possible to change both	**53**	39	34	52	39	56	26	45	57	-	43
No	**18**	29	41	20	32	16	36	31	12	28	17
Don't know	**1**	3	1	1	2	1	4	1	1	5	1
All who knew possible to switch either tariff or payment method for either fuel	**81**	67	58	79	66	83	60	68	87	68	82

Source: Ipsos MORI

Last year's survey recorded a sharp rise in awareness that it is possible to switch either tariff or payment method. This year sees no significant change in this high level of overall awareness. The proportion aware that both tariff and payment method can be switched is, however, up 10 points to 53%, suggesting there is growing knowledge and familiarity with the terminology and options available within the market.

Just 18% of those who have not switched tariff or payment method in the past year are unaware of the possibility of tariff or payment method switching. This group is made up disproportionately of customers on standard credit, quarterly direct debit and (especially) PPMs, social grades C2, D and E, those from BME groups, those who rent their homes, those who are falling behind with their bills or for whom it is a struggle to pay bills sometimes, those with a physical or mental impairment and those in the 15-34 age group.

4 Knowledge and preconceptions about switching

Q21. Did you know it was possible to switch to a different gas or electricity supplier?

	Total	Area			Social grade			Ethnicity		Previous surveys (all)		
	2014	Urban	Sub-urban	Rural	AB	C2	DE	*White*	BME	2011	2012	2013
Base: All responsible for bills who have never switched gas or electricity supplier	*(819) %*	*(420) %*	*(184) %*	*(215) %*	*(139) %*	*(203) %*	*(240) %*	*(729) %*	*(87) %*	*(875) %*	*(934) %*	*(882) %*
Yes to both	78	76	87	76	87	75	67	80	61	-	79	77
Yes – Electricity not gas	2	*	1	6	3	2	3	2	-	-	2	2
Yes – Gas not electricity	3	3	3	4	5	5	1	3	3	-	1	5
Yes (to either elec or gas)	84	79	92	87	94	82	71	86	64	87	80	84
No	15	19	8	13	5	18	27	13	33	10	16	16
Don't know	1	2	*	-	1	-	2	1	3	3	3	1

Source: Ipsos MORI

Awareness of the possibility of switching energy supplier among those who have never switched is stable at 84%. Those who are unaware comprise nine percent of all energy customers[8]. They are composed disproportionately of people on PPMs, standard credit or quarterly direct debit, younger people (15-34), social grades C2, D and E, those from BME groups, those in urban areas, those who rent their homes and those who are falling behind or occasionally struggle to pay their bills.

[8] All energy consumers = all surveyed with mains electricity and/or gas who are responsible (solely or jointly) for paying household gas or electricity bills

Q22. For each of the items here, could you please say which of them, if any, apply to you?

	Total 2014	Age			Social grade		Tenure		Previous surveys (all)		
		15-34	35-64	65+	*AB*	E	Rented	Not rented	2011	2012	2013
Base: All responsible for bills but have never switched gas or electricity supplier	*(819) %*	*(202) %*	*(387) %*	*(230) %*	*(139) %*	*(89) %*	*(296) %*	*(523) %*	*(875) %*	*(934) %*	*(882) %*
I'm happy with my current supplier(s)	**56**	55	56	59	54	55	50	59	77	78	55
Switching is a hassle	**30**	31	28	31	31	27	31	29	22	20	27
I don't think there's any difference between suppliers to make switching worthwhile[9]	**21**	23	20	23	22	14	25	20	20	13	17
I've checked prices of other suppliers and I think I'm on the best deal[10]	**11**	11	11	13	14	6	8	13	13	9	12
I am unsure where to get info to help me make a good choice	**4**	6	4	3	3	8	6	3	4	2	6
I wouldn't know how to switch even if I wanted to	**3**	4	2	3	3	2	3	3	2	3	4
I live in rented accommodation and I don't think my landlord would allow me to switch[11]	**4**	10	3	1	3	5	11	1	3	3	3
My supplier has told me I can't switch	**2**	2	2	2	2	2	1	2	-	1	2
I am in debt with my current supplier so I don't think I can switch	**2**	2	3	*	-	6	3	1	1	1	2

Source: Ipsos MORI

[9] 2011 wording: I don't think there is much difference
[10] 2011 wording: …and I think I'm already on a good deal
[11] 2011 wording: I live in a rented house and I don't think my landlord would allow me to switch

A majority of non-switchers continue to claim they are happy with their current supplier, though, as last year, this is considerably fewer than in 2012. Beyond this, there are two specific beliefs that have increased in acceptance for two years' running: *switching is a hassle* is given as a reason by 30% this year, up a marginal three points since last year and a significant ten points since 2012, and *I don't think there's any difference between suppliers to make switching worthwhile*, given by 21%, up four points since last year and up eight points since 2012, both of which are significant increases. The growing belief that switching can be problematic is distributed widely across all demographic groups.

Q36. What would be the minimum amount of money you would have to save per year in order for it to encourage you to switch your gas or electricity supplier?

	Total	Age			Social grade			Internet Access		All	
		15-34	35-64	65+	AB	C1	DE	*Yes*	No	2012	2013
Base: All never switched supplier giving numerical answer	(396) %	(97) %	(210) %	(89) %	(86) %	(122) %	(88) %	(344) %	(52) %	(412) %	(419) %
0-£50	24	31	24	17	23	29	23	24	22	23	28
£51-100	33	34	30	43	35	34	32	34	31	30	31
£101-£200	24	23	27	19	22	21	30	24	30	26	26
£201+	18	12	20	20	19	16	15	18	17	20	15
MEAN	£158	£138	£165	£162	£157	£155	£157	£156	£174	£167	£153
MEDIAN	£99	£91	£99	£99	£90	£95	£99	£97	£99	-	£94
Base: All never switched supplier	(819) %	(202) %	(387) %	(230) %	(139) %	(237) %	(240) %	(661) %	(158) %	(943) %	(882) %
Not about saving money	16	13	14	23	16	17	18	13	29	15	12
Don't know	32	34	28	36	19	30	43	31	35	35	36
Refused	2	4	2	2	3	1	3	2	2	2	2

Source: Ipsos MORI

As last year, half of non-switchers are able to give an approximate minimum saving they would expect to make if it were going to encourage them to switch supplier. The mean saving required is £158, slightly up on last year. Since the mean can be distorted by a few very large expectations, it may be more realistic to use the median figure of £99 – the central value in the middle of the range of answers given. Among those who are able to give a value, 42% say they would need to save over £100 per year. Generally, those in C2 and DE social grades need to save more before they would be encouraged to switch, as do those in Scotland and those with no internet access (in contrast to last year's findings, when expectations among these groups were lower than the wider population of non-switchers).

The proportion who state it is "not about saving money" has grown by four points this year to 16% of non-switchers; this view is taken particularly by the over 65 age group and standard credit electricity customers.

5 Reasons for switching on last occasion

Q23. Thinking about the last time you switched your gas supplier, what was the main trigger causing you to switch?

	All 2014	Payment method			Age			Previous surveys (all)		
		Monthly/ Quarterly Direct debit	Standard credit	PPM (gas)	15-34	35-64	65+	2011	2012	2013
Base: All with mains gas and responsible for bill who have ever switched gas supplier	*(496) %*	*(397) %*	*(28) %*	*(57) %*	*(70) %*	*(300) %*	*(126) %*	*(543) %*	*(438) %*	*(440) %*
Believed new supplier to be cheaper/to save money	**70**	70	49	86	55	74	71	79	76	75
Moved home	**10**	9	23	9	25	9	2	-	3	6
Wanted a fixed price deal	**6**	6	7	3	8	5	6	1	2	2
Believed new supplier offered better customer service	**4**	4	15	-	-	3	9	7	5	6
Wanted to switch to a dual fuel package	**3**	4	-	-	1	3	5	4	5	4
Salesperson calling at house	**1**	1	-	2	-	1	1	-	-	1
Wanted a greener tariff	**1**	1	-	-	2	*	1	1	1	1
Believed new supplier offered better benefits	*****	*	-	-	-	*	1	-	2	1
Wanted an online tariff	*****	1	-	-	2	*	-	1	*	*
Dispute with supplier	*****	*	-	-	-	*	-	-	-	*
Poor service	**-**	-	-	-	-	-	-	-	-	*
Written communication from your supplier	**-**	-	-	-	-	-	-	-	*	-
Other	**2**	3	6	-	6	2	3	6	3	2
Don't know	**1**	1	-	1	1	1	1	-	-	1

Source: Ipsos MORI

Q28. Thinking about the last time you switched your electricity supplier, what was the main trigger causing you to switch?

	All 2014	Payment Method			Age			Previous surveys (all)		
		Monthly/ Quarterly direct debit	Standard credit	PPM (elec)	15-34	35-64	65+	2011	2012	2013
Base: All with mains electricity and responsible for bill who have ever switched gas supplier	*(519) %*	*(417) %*	*(33) %*	*(58) %*	*(72) %*	*(309) %*	*(138) %*	*(587) %*	*(499) %*	*(510) %*
Believed new supplier to be cheaper/to save money	72	73	51	77	62	75	69	77	77	76
Moved home	8	7	17	12	23	6	4	-	3	5
Wanted a fixed price deal	6	5	10	1	4	6	5	2	1	2
Believed new supplier offered better customer service	4	4	12	-	2	3	7	5	5	5
Wanted a dual fuel package	4	5	-	-	-	4	6	5	5	4
Salesperson calling at house	1	*	-	3	-	1	1	-	-	1
Wanted a greener tariff	1	2	-	-	2	1	2	2	*	1
Believed new supplier offered better benefits	*	*	-	-	-	*	1	-	2	1
Written communication from your supplier	*	*	3	-	-	*	1	-	*	*
Dispute with supplier	-	-	-	-	-	-	-	-	-	1
Poor service	-	-	-	-	-	-	-	-	-	1
Other	2	2	2	2	5	1	*	6	2	2
Don't know	1	1	5	2	1	*	3	-	-	*

Source: Ipsos MORI

While believing a supplier to be cheaper is still the main trigger for switching either fuel, two of the secondary triggers are marginally increasing in their influence. Moving home is up four points for gas customers and three points for electricity customers, possibly an indication of the reviving home buying market. The prospect of a fixed price deal is also marginally up, by four points for each fuel, suggesting consumers may be increasingly keen to protect themselves from future rises.

6 Finding out about the deals available

Q24. Thinking about the last time you switched your gas supplier, how did you find out about the deals offered by the supplier you switched to?

	All 2014	Social Grade		Age			Physical/ Mental Impair ment		Internet Access		Previous surveys (all)		
		AB	E	15-34	35-64	65+	Yes	No	Yes	No	2011	2012	2013
Base: All with mains gas and responsible for bill who have ever switched gas supplier	(496) %	(145) %	(34) %	(70) %	(300) %	(126) %	(75) %	(421) %	(460) %	(36) %	(543) %	(438) %	(440) %
Online/website price comparison service	40	51	15	40	48	20	28	42	43	-	21	34	35
Supplier representative knocked at my door	13	11	19	9	11	19	19	12	12	25	31	23	19
Salesperson in public place	7	4	9	7	7	9	4	8	7	9	7	10	7
Looked at websites of more than one supplier	5	8	-	5	5	6	2	6	6	-	3	3	7
Friend or family member	5	4	4	7	5	5	8	5	5	4	6	6	6
New supplier phoned me	5	5	6	1	5	5	9	4	5	5	7	6	5
I saw an advert	5	2	18	7	3	9	10	4	4	13	4	2	3
Phoned comparison service	4	6	-	5	4	4	4	4	4	3	7	4	4
I rang them (only)	3	1	2	5	2	4	2	3	3	4	3	4	4
I rang them and other suppliers	3	2	12	9	2	3	3	3	3	5	2	3	3
Looked at supplier's own website only	2	1	-	1	2	4	1	2	2	-	4	3	3
Written communication or marketing material	2	3	3	1	2	4	3	2	2	10	-	1	1
Through a collective (group) switching campaign	2	-	8	-	1	4	2	1	1	13	-	-	1
Other	5	5	2	3	6	5	7	5	5	2	5	4	7
Don't know	3	2	4	5	2	4	1	3	3	11	3	4	4

Source: Ipsos MORI

Q29. Thinking about the last time you switched your electricity supplier, how did you find out about the deals offered by the supplier you switched to?

	All 2014	Social Grade		Age			Physical/ Mental Impair-ment		Internet Access		Previous surveys (all)		
		AB	E	15-34	35-64	65+	*Yes*	*No*	Yes	No	2011	2012	2013
Base: All with mains electricity and responsible for bill who have ever switched electricity supplier	*(519) %*	*(153) %*	*(42) %*	*(72) %*	*(309) %*	*(138) %*	*(74) %*	*(445) %*	*(483) %*	*(36) %*	*(583) %*	*(499) %*	*(510) %*
Online/website price comparison service	40	50	9	48	46	21	28	42	43	3	24	31	37
Supplier representative knocked at my door	12	12	17	5	12	17	19	11	12	24	29	22	17
Salesperson in public place	8	6	13	9	6	12	6	8	8	4	7	7	7
Friend or family member	6	3	5	5	5	8	10	5	6	9	6	5	6
Looked at the websites of more than one supplier	5	8	-	1	6	6	2	5	5	-	2	3	5
New supplier phoned me	5	7	5	-	7	4	10	5	5	6	9	8	4
Phoned comparison service	4	3	12	9	2	7	10	3	4	10	5	5	4
Looked at supplier's own website	4	6	3	2	4	5	1	4	4	-	4	4	2
I rang them (only)	4	3	-	6	3	5	1	4	4	2	4	4	5
I rang them and other suppliers	3	2	8	6	2	4	3	3	3	8	2	3	4
I saw an advert	3	2	5	-	2	8	6	3	3	10	5	5	3
Written communication or marketing material	2	2	10	1	2	4	4	2	2	7		1	3
Through a collective (group) switching campaign	2	-	7	-	1	4	2	2	1	12	-	-	1
Other	4	2	8	11	3	4	6	4	4	5	5	3	7
Don't know	2	1	2	-	3	2	-	2	2	6	4	3	2

Source: Ipsos MORI

The main source of information for supplier switching remains online price comparison sites, in fact mentions of them are up a marginal five points for gas and three points for electricity. The mentions of doorstep supplier representatives continue to fall significantly. There are many other secondary sources of information, including friends or family members, supplier websites, advertising and telephone sales activity by suppliers. Mentions of collective switching schemes, introduced to the questionnaire last year, are made by two per cent compared to one per cent last year, but still make little impression overall as an information source for switching.

7 Method used to make the last switch

Q25. Thinking about the last time you switched your gas supplier, how did you switch?

	All 2014	Payment Method		Age			Social Grade		Internet Access		Previous survey (all)	
		Monthly/ Quarterly Direct Debit	Standard credit	15-34	35-64	65+	AB	DE	Yes	No	2012	2013
Base: All with mains gas and responsible for bill who have ever switched gas supplier	*(496) %*	*(397) %*	*(28) %*	*(70) %*	*(300) %*	*(126) %*	*(145) %*	*(95) %*	*(460) %*	*(36) %*	*(438) %*	*(440) %*
Online/website price comparison service	31	35	5	32	38	12	42	18	33	2	27	26
Phoning supplier	27	26	44	35	25	27	19	31	27	31	24	29
Through a salesperson who knocked at my door	15	14	16	13	13	23	12	22	14	31	24	19
Through the supplier's website	7	8	13	2	8	7	9	5	8	-	4	5
Through salesperson in public place	5	4	7	4	5	6	4	9	5	6	7	7
Telephone price comparison service	3	3	2	6	3	4	2	2	3	5	5	4
Through a collective (group) switching campaign	2	2	5	-	1	4	1	4	1	8	-	1
Written communications	1	1	4	1	1	4	1	2	1	8	1	2
Other	6	6	-	5	5	9	8	5	6	4	7	5

Source: Ipsos MORI

Q30. Thinking about the last time you switched your electricity supplier, how did you switch?

	All 2014	Payment Method		Age			Social Grade		Internet Access		Previous survey (all)	
		Monthly/ Quarterly Direct Debit	Standard credit	15-34	35-64	65+	AB	DE	Yes	No	2012	2013
Base: All with mains electricity and responsible for bill who have ever switched electricity supplier	*(519) %*	*(417) %*	*(33) %*	*(72) %*	*(309) %*	*(138) %*	*(153) %*	*(100) %*	*(483) %*	*(36) %*	*(499) %*	*(510) %*
Online/website price comparison service	31	36	1	37	36	14	40	18	33	3	25	26
Phoning supplier	27	25	47	33	25	29	22	32	27	25	30	29
Through a salesperson who knocked at my door	14	12	17	10	13	19	11	19	13	27	23	17
Through supplier's website	9	10	11	2	10	9	14	5	10	-	4	6
Through salesperson in public place	5	4	4	4	4	7	3	9	5	4	7	7
Telephone price comparison service	3	3	-	2	3	4	1	2	3	9	5	3
Written communications	2	2	3	1	*	5	2	2	1	10	2	3
Through a collective (group) switching campaign	1	1	4	-	1	4	-	5	1	12	-	1
Other	6	5	4	11	4	8	6	6	6	5	4	5

Source: Ipsos MORI

As the method of actually making the switch, online price comparison services have been re-established as the leader, overtaking the option of phoning the supplier. While the use of doorstep sales representatives continues to decline, it remains the third most frequently reported method (though as the question relates to "the last time you switched" many of these instances may relate to switches previous to the last year). The online price comparison services appeal most to those on direct debit, the under 65 year olds, social grades AB and, of course, those with internet access.

8 Expectation of savings on switching

Q37. On the last occasion when you decided to switch your supplier, how much did you expect to save per year?

		Age			Social Grade		Previous survey (all)	
		15-34	35-64	65+	AB	E	2012	2013
Base: All ever switched giving numerical answer	*(293) %*	*(45) %*	*(190) %*	*(58) %*	*(95) %*	*(20) %*	*(264) %*	*(261) %*
0-£50	18	20	16	22	18	29	13	16
£51-£100	30	26	31	32	29	17	29	35
£101-£200	32	33	33	29	35	25	37	34
£201+	20	21	20	17	19	29	21	15
MEAN	£167	£171	£175	£134	£171	£199	£173	£195
MEDIAN	£111	£142	£113	£98	£130	126	-	£100
Base: All ever switched either fuel	*(574) %*	*(82) %*	*(340) %*	*(152) %*	*(164) %*	*(46) %*	*(550) %*	*(551) %*
Not about saving money	11	14	8	17	9	16	8	11
Don't know	37	30	36	45	34	40	42	40

Source: Ipsos MORI

Around half of all who have ever switched are able to estimate how much they expected to save. While mean expected savings are down £28 from last year, the median saving expected is a little higher (up £11). This may be due to fewer unrealistically high estimates this year that have previously pushed up the mean. Just over half (52%) of those who give numeric answers expected to save over £100 per year. These estimates compare favourably with the amount non-switchers claim they need to save to encourage them to switch supplier (a median of £99).

Again this year, 11% said the switch was not about saving money.

9 Customers' evaluations of switching

Q26. 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 2014	Social grade			Previous surveys (all)		
		AB	C1	DE	2011	2012	2013
Base: All who switched gas supplier to save money	(350) %	*(99) %*	*(110) %*	*(71) %*	*(432) %*	*(336) %*	*(328) %*
Yes	**69**	69	75	57	62	72	68
No	**20**	21	19	30	12	17	19
Don't know	**10**	10	6	13	26	11	13

Source: Ipsos MORI

Q31. 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 2014	Social Grade			Previous surveys (all)		
		AB	C1	DE	2011	2012	2013
Base: All who switched electricity supplier to save money	(374) %	(111) %	(124) %	(73) %	*(461) %*	*(387) %*	*(384) %*
Yes	**73**	74	77	58	64	73	70
No	**19**	20	19	28	11	13	20
Don't know	**8**	6	4	13	25	14	10

Source: Ipsos MORI

There is very marginal improvement in the proportion of those switchers who say they feel they are now paying less as a result of the switch. However, for neither gas nor electricity has this figure exceeded the previously highest recorded in 2012. Social grades DE are least likely to feel their last switch actually saved money compared to what they would have been paying, had they not switched.

Q27-1.How much do you agree or disagree that:
"I found it easy to decide which deal to switch my gas to" (gas)

	All 2014	Social grade		Previous surveys (all)		
		AB	DE	2011	2012	2013
Base: All with mains gas and responsible for bills who have ever switched gas supplier	(496) %	(145) %	(95) %	(543) %	(438) %	(440) %
Agree	68	59	74	77	72	69
Neither	13	16	12	8	9	11
Disagree	19	24	14	13	17	19
No opinion/ Don't know	*	1	1	2	2	*

Source: Ipsos MORI

Q32-1.How much do you agree or disagree that:
"I found it easy to decide which deal to switch my electricity to" (electricity)

	All 2014	Social grade		Previous surveys (all)		
		AB	DE	2011	2012	2013
Base: All with mains electricity and responsible for bills who have ever switched electricity supplier	(519) %	(153) %	(100) %	(587) %	(499) %	(510) %
Agree	72	67	68	77	75	68
Neither	10	10	14	8	7	12
Disagree	18	22	17	12	16	19
No opinion/ Don't know	*	1	1	2	2	*

Source: Ipsos MORI

Broadly the figures show no significantly different outcome this year - a majority for each fuel considers it was easy to decide which deal to switch to on the last occasion. The proportion that agrees in relation to electricity is up a marginal four points this year. In the case of gas, social grades DE are much more confident than ABs that they found it easy to decide.

Q27-2. How much do you agree or disagree that:
"*I am confident that I fully understand the key features of the deal I switched to*" (gas)

	All 2014	Area			Social grade		Previous surveys (all)		
		Urban	Suburban	Rural	AB	C1	2011	2012	2013
Base: All with mains gas and responsible for bills who have ever switched gas supplier	*(496) %*	*(258) %*	*(122) %*	*(116) %*	*(145) %*	*(168) %*	*(543) %*	*(438) %*	*(440) %*
Agree	**75**	77	81	65	69	82	76	73	72
Neither	**10**	9	6	16	9	10	11	7	10
Disagree	**14**	13	14	18	21	8	11	19	18
No opinion/ Don't know	*	1	0	1	1	0	1	1	-

Source: Ipsos MORI

Q32-2. How much do you agree or disagree that:
"*I am confident that I fully understand the key features of the deal I switched to*" (electricity)

	All 2014	Social Grade		Previous surveys (all)		
		AB	C1	2011	2012	2013
Base: All with mains electricity and responsible for bills who have ever switched electricity supplier	*(519) %*	*(153) %*	*(174) %*	*(587) %*	*(499) %*	*(510) %*
Agree	**76**	72	83	77	74	73
Neither	**8**	6	6	9	7	10
Disagree	**15**	22	11	12	17	17
No opinion/ Don't know	*	0	0	2	2	-

Source: Ipsos MORI

A majority for both fuels agrees that they fully understand the key features of the deal they switched to, with no significant difference from last year. No more than one in six disagree. Among gas customers, significantly more agree they understand in urban and suburban areas than in rural areas. Among both gas and electricity switchers there is much more expressed understanding of the chosen deal among the C1 social grade than among those in AB.

Q27-3. How much do you agree or disagree that:
"I would be confident that if I switched again, I would make the right choice for me" (gas)

	All 2014	Age			Social Grade		Internet access		Previous survey (all)	
		15-34	35-64	65+	AB	DE	Yes	No	2012	2013
Base: All with mains gas and responsible for bills who have ever switched gas supplier	*(496) %*	*(70) %*	*(300) %*	*(126) %*	*(145) %*	*(95) %*	*(460) %*	*(36) %*	*(438) %*	*(440) %*
Agree	**71**	75	71	66	68	68	72	55	71	70
Neither	**15**	11	13	21	15	15	14	21	9	15
Disagree	**14**	13	15	11	16	16	13	22	18	14
No opinion/ Don't know	**1**	-	*	2	1	1	*	2	2	*

Source: Ipsos MORI

Q32-3. How much do you agree or disagree that:
"I would be confident that if I switched again, I would make the right choice for me" (electricity)

	All 2014	Age			Social Grade		Internet access		Previous survey (all)	
		15-34	35-64	65+	AB	DE	Yes	No	2012	2013
Base: All with mains electricity and responsible for bills who have ever switched electricity supplier	*(519) %*	*(72) %*	*(309) %*	*(138) %*	*(153) %*	*(100) %*	*(483) %*	*(36) %*	*(499) %*	*(510) %*
Agree	**77**	79	75	78	75	72	77	70	74	72
Neither	**9**	5	10	11	9	12	9	9	8	13
Disagree	**14**	13	15	10	16	15	13	21	17	15
No opinion/Don't know	**1**	3	*	1	-	1	1	-	2	-

Source: Ipsos MORI

Gas switchers give much the same response as last year – a majority of 71% would be confident that if they switched again they would make the right choice for them. Electricity switchers show a marginal five-point increase in agreement that they would be confident the next time. For both fuels there is very little difference in views by age or social grade (or indeed any other demographic variables) but it is apparent that those with internet access are more likely than those without it to agree they would be confident next time, significantly more for gas.

10 Attitudes to tariff choices

Q39. Using the answers here, how easy or difficult do you believe it is to compare different tariffs for electricity or gas?

	All 2014	Age			Internet access		Physical/Mental Impairment		Previous survey (all) 2013
		15-34	35-64	65+	Yes	No	Yes	No	
Base: All with mains electricity or gas and responsible for bills	*(1393) %*	*(284) %*	*(727) %*	*(382) %*	*(1192) %*	*(201) %*	*(206) %*	*(1187) %*	*(1,433) %*
Very easy	13	19	15	5	15	2	10	14	13
Fairly easy	29	34	31	22	30	19	25	30	23
Neither easy nor difficult	21	22	19	24	19	32	21	21	24
Fairly difficult	20	14	20	26	20	23	23	20	22
Very difficult	12	7	12	18	12	14	16	12	15
Don't know	4	5	3	6	4	10	5	4	3

Source: Ipsos MORI

The last year has seen a significant improvement in customers' evaluation of the perceived difficulty of comparing different tariffs. The proportion rating it as very or fairly easy is up six points to 42% while the proportion rating it as very or fairly difficult is down five points to 32%.

Age continues to be a major factor in perceived difficulty; the 65+ age group still finds comparison significantly more difficult. Those with internet access consider comparison to be easier than those without. Customers with a physical or mental impairment find comparison significantly more difficult than those without one. By social grade, the proportion rating comparison as easy is significantly higher for the AB, C1 and C2 groups than for the DE grades, though for all grades those rating it easy outweigh those who rate it as difficult.

By consumer typology[12] (see appendix for detailed definitions) the Lapsed Engaged group stands out as the only one more likely to consider the comparison to be difficult on balance. This is the group who have previously switched supplier but not recently. The Recently Engaged group (48% very/fairly easy; 35% very/fairly difficult) is more likely than those who are Disengaged (43% very/fairly easy; 26% very/fairly difficult) to believe the comparison is difficult, despite both groups being in overall agreement that the comparison is easy, on balance.

[12] Consumers are divided in the analysis into four typologies based on their switching of supplier, tariff or payment method: Disengaged, Partially Engaged, Lapsed Engaged and Recently Engaged.

Q40. What is it that makes them difficult to compare? (SPONTANEOUS – OPEN ENDED)

	All	Social Grade			Internet access		Tenure		Previous survey (all)
	2014	AB	C2	E	Yes	No	Rented	Not Rented	2013
Base: All those who answered 'very/fairly difficult' at OG39	*(457) %*	*(124) %*	*(87) %*	*(38) %*	*(384) %*	*(73) %*	*(109) %*	*(348) %*	*(530) %*
Confusing tariffs/information/difficult to understand/ complicated/Don't know how to compare (net)	33	30	39	41	33	36	36	32	40
Hard to compare like for like/ Not standardised information/ different deals/ prices in different formats	21	32	10	-	23	7	11	24	17
Too many tariffs/ multiple rates/ structures/ choices	16	14	14	1	16	15	16	16	23
Too much jargon/ technical language/ terminology used	9	7	7	10	9	7	8	9	8
Do not keep to price promised/ hidden costs/ misleading/incorrect/ conflicting info/ not transparent/ honest (net)	7	8	12	3	8	-	11	5	7
Not computer literate/ not financially minded/ too many numbers/ suffer from dyslexia (net)	4	3	6	4	4	3	2	5	3
Not enough information	3	4	2	2	4	-	1	3	5
Other	6	3	6	12	5	10	5	6	8
Don't know	7	3	6	24	5	20	14	5	6

Source: Ipsos MORI

Those (33%) rating the comparison of tariffs as difficult were asked what it is that makes them difficult to compare. Responses were a little more specific this year with marginally fewer (33%) giving the view that tariffs are too complicated, confusing or not clear, without further elaboration. Of the more specific responses, 21% say it is hard to compare like with like because the information or prices are shown in non-comparable formats. As last year, this is especially frequently mentioned by social grade AB. This is up a marginal four points since last year. However significantly fewer people spontaneously mention the issue that there are too many tariffs – down seven points to 16%. Around one in ten (9%) mention the jargon or language used and 7% accuse companies of being deliberately misleading. Just 4% feel the problem is that they are not computer literate or even suffer from dyslexia.

Q41. Thinking about the number of different tariffs available to you, in your view, are there the right number of energy tariffs available, or are there too many tariffs or too few tariffs?

	All	Social Grade			Age			Tenure		Previous survey (all)
		AB	C2	E	15-34	35-64	65+	Rented	Not rented	2013
Base: All those with mains electricity or gas who are responsible for bills	*(1393) %*	*(303) %*	*(305) %*	*(135) %*	*(284) %*	*(727) %*	*(382) %*	*(407) %*	*(986) %*	*(1,433) %*
The right number of tariffs	21	18	22	19	31	20	14	23	20	20
Too many tariffs	62	69	63	55	51	65	67	57	64	62
Too few tariffs	4	2	5	5	6	5	3	5	4	5
Don't know	12	11	10	21	13	10	16	16	11	14

Source: Ipsos MORI

However, when asked specifically about the number of tariffs available, as last year, 62% of energy customers continue to believe there are too many energy tariffs. Social grade AB is more likely to give this response and social grade E least likely. Those aged over 34 are more likely to give this response than younger customers, who are the most likely to say there are the right number of tariffs. Those who are not in rented accommodation are marginally more likely to say there are too many than those who rent their homes. Those in rented accommodation, those aged 65+ and those in social grade E are most likely to give a response of *don't know.*

Q41. Thinking about the number of different tariffs available to you, in your view, are there the right number of energy tariffs available, or are there too many tariffs or too few tariffs? BY TYPOLOGY

		Consumer Typology (see Appendix)				
	All	Disengaged	Partially engaged	Lapsed engaged	Recently engaged	Previous survey (all) 2013
Base: All those with mains electricity or gas who are responsible for bills	*(1393) %*	*(735) %*	*(84) %*	*(244) %*	*(330) %*	*(1433) %*
The right number of tariffs	21	24	25	15	18	20
Too many tariffs	62	*57*	54	70	70	62
Too few tariffs	4	4	5	4	5	5
Don't know	12	15	15	11	7	14

Source: Ipsos MORI

Among the customer typologies (see appendix 14.8 for details) it is those with the most experience of supplier switching, the Lapsed Engaged and the Recently Engaged, who are most likely to feel there are too many tariffs, and least likely to say there are the right number. Those with lower levels of previous engagement are more likely to give a *don't know* response. However in all four groups, "too many tariffs" is the majority view.

Q42. To what extent would you say you understand the range of different energy tariffs available to you?

	All	Social Grade		Internet Access		Physical/Mental Impairment		Previous survey (all)
	2014	AB	DE	Yes	No	Yes	No	2013
Base: All those with mains electricity or gas who are responsible for bills	*(1393) %*	*(303) %*	*(352) %*	*(1192) %*	*(201) %*	*(206) %*	*(1187) %*	*(1,433) %*
Completely	9	11	6	10	5	8	9	10
A fair amount	41	41	36	43	27	33	42	35
Not very much	34	33	36	34	35	36	34	35
Not at all	13	12	19	11	27	19	12	19
Don't know	3	3	3	2	6	4	3	2

Source: Ipsos MORI

While the overall level of understanding of the range of energy tariffs has improved since last year (the percentage who say they understand completely or at least a fair amount is up five points to 50%), there is no improvement in the proportion who claim they understand it "completely".

Perceived understanding is significantly lower among social grades DE than among AB. It is also lower among those without internet access and those with a physical or mental impairment. Those over 65 express less understanding than those aged up to 64.

Q42. To what extent would you say you understand the range of different energy tariffs available to you? BY TYPOLOGY

		Consumer Typology (see Appendix)				Previous survey (all)
	All	Disengaged	Partially engaged	Lapsed engaged	Recently engaged	2013
Base: All those with mains electricity or gas who are responsible for bills	*(1393) %*	*(735) %*	*(84) %*	*(244) %*	*(330) %*	*(1,433) %*
Completely	9	8	14	5	12	10
A fair amount	41	*36*	44	42	51	35
Not very much	34	37	30	38	27	35
Not at all	13	14	10	14	9	19
Don't know	3	5	2	1	1	2

Source: Ipsos MORI

Perceived understanding of the range of tariffs is lowest among the Disengaged group, but higher among the Partially Engaged than the Lapsed Engaged (see appendix 14.8 for details). It is best of all among the Recently Engaged, but even among that group, over one in three say they understand "not very much" or "not at all" and only 12% feel they understand completely.

11 Information and communication received from suppliers

11.1 Types of information received

Q5a. In the last year, have you received information from your supplier about: the name of the tariff you are on (your tariff is the pricing plan for the electricity and/or gas you use)?

	All 2014	Payment method (gas)			Social grade		Area			Tenure		Previous survey (all)	
		Monthly/ Quarterly Direct debit	Standard credit	PPM (gas)	AB	E	Urban	Sub-urban	Rural	Rent ed	Not rented	2012	2013
Base: All with mains gas or electricity who are responsible for bills	*(1393) %*	*(875) %*	*(118) %*	*(172) %*	*(303) %*	*(135) %*	*(701) %*	*(328) %*	*(364) %*	*(407) %*	*(986) %*	*(1,484) %*	*(1,433) %*
Yes	59	63	57	49	64	50	60	60	56	49	63	48	54
No	35	30	42	44	30	42	33	34	41	43	32	37	42
Don't know	6	6	1	7	7	8	7	7	3	7	5	15	4

Source: Ipsos MORI

The proportion who have received information on the name of their tariff in the past year has increased again, this time by five points to 59%. Perception of having received this information is related to payment method (PPM customers are less likely to recall it), social grade (those in grade E are least likely to recall it), type of area (rural customers recall it least) and home tenure (those who rent recall it least). Similarly those with physical or mental impairment and those with no internet access and less likely to recall it. There is a strong overlap between these various sub-groups which may be summed up in the finding that those who occasionally struggle or fall behind with bills are less likely than more affluent customers to recall if they have been told the name of their tariff.

Q5b. In the last year, have you received information from your supplier about: any changes to your tariff?

	All 2014	Payment method (gas)			Social grade			Tenure		Internet access		Previous survey (all)	
		Monthly/ Quarterly Direct debit	Standard credit	PPM (gas)	AB	C1	DE	Rented	Not rented	Yes	No	2012	2013
Base: All with mains gas or electricity who are responsible for bills	*(1393)* %	*(875)* %	*(118)* %	*(172)* %	*(303)* %	*(433)* %	*(352)* %	*(407)* %	*(986)* %	*(1192)* %	*(201)* %	*(1,484)* %	*(1,433)* %
Yes	43	49	32	27	50	49	29	31	47	45	30	40	40
No	52	45	67	67	44	45	67	62	48	50	65	48	56
Don't know	5	6	1	6	6	5	4	7	4	5	5	12	4

Source: Ipsos MORI

The proportion of customers who have received information about changes to their tariff in the past year is up only a marginal three points to 43%. Awareness of changes is highest among those on direct debit, social grade AB and those who do not rent their homes. It is also a little higher in England than in Scotland and Wales.

Q5c. In the last year, have you received information from your supplier about: the forecast cost of your energy consumption over the coming year?

	All 2014	Payment method (gas)			Social grade		Internet access		Area		Tenure		Previous survey (all)	
		Monthly/ Quarterly Direct debit	Standard credit	PPM (gas)	AB	DE	Yes	No	Urban	Rural	Rented	Not rented	2012	2013
Base: All with mains gas or electricity who are responsible for bills	*(1393)* %	*(875)* %	*(118)* %	*(172)* %	*(303)* %	*(352)* %	*(1192)* %	*(201)* %	*(701)* %	*(364)* %	*(407)* %	*(986)* %	*(1484)* %	*(1,433)* %
Yes	52	54	57	38	56	47	52	47	51	53	40	56	44	47
No	43	40	42	55	36	48	42	48	42	45	54	39	43	48
Don't know	6	6	1	7	7	5	6	5	7	3	6	5	13	4

Source: Ipsos MORI

Awareness of having been told their forecast consumption is up five points since last year. Some sub-groups are less likely to be aware of this: for example PPM customers, social grades C2, D and E, those who rent their homes, the BME group and the 15-34 age group. In this case the 65+ age group is most likely to be aware of this information. There is, however, no longer a significant difference between urban and rural customers or between those with and without internet access.

11.2 Attitudes to specific communications

Q43. Please tell me if you recall receiving any of the following in the last year? You may have received these via post or email.

		All 2014	Age			Social Grade			Tenure		Previous survey (all)
			15-34	35-64	65+	AB	C2	DE	Rented	Not rented	2013
Base: All those with mains electricity or gas who are responsible for bills		*(1393) %*	*(284) %*	*(727) %*	*(382) %*	*(303) %*	*(305) %*	*(352) %*	*(407) %*	*(986) %*	*(1,433) %*
At least one bill or statement of account	Yes	**83**	74	84	89	91	78	74	72	87	80
	No	**15**	25	14	10	7	20	24	25	12	18
	Don't know	**2**	1	2	1	2	2	1	3	1	1
An annual statement	Yes	**67**	52	69	75	74	63	60	52	73	63
	No	**30**	43	28	22	24	35	36	44	25	34
	Don't know	**3**	4	2	2	2	2	3	4	2	4
Base: All not on a fixed term contract for both electricity and gas		*(756) %*	*(170) %*	*(392) %*	*(194) %*	*(141) %*	*(164) %*	*(215) %*	*(255) %*	*(501) %*	*(842) %*
A price increase notification letter	Yes	**59**	49	63	58	59	59	51	49	63	62
	No	**36**	47	32	35	36	34	43	44	33	34
	Don't know	**5**	4	5	7	5	7	5	7	4	5
Base: All on fixed term for at least one fuel		*(748) %*	*(138) %*	*(384) %*	*(226) %*	*(188) %*	*(168) %*	*(166) %*	*(191) %*	*(557) %*	*(762) %*
An end of fixed term letter	Yes	**38**	31	39	41	45	36	29	29	41	32
	No	**59**	66	57	59	53	61	67	67	57	66
	Don't know	**3**	3	4	1	2	2	3	3	3	2

Source: Ipsos MORI

Recall of receiving annual statements, bills or statements of account and end of fixed term letters are all up slightly on last year. Bills or statements of account remain the most widely received communications though they remain far from universal – even among those on direct debit only 88% have received at least one. This falls to 59% among those on gas PPMs. It is also somewhat lower among those in social grades DE, those who rent their homes and those aged 15-34.

Annual statements have been received by two-thirds of all energy customers, rising to 75% of those aged 65+, so recollection of their receipt is by no means universal.

Among those not on fixed tariffs for both fuels, 59% recall receiving a price increase notification letter. As last year, it is likely all will have been subject to price increases over the period in question, if they have been with their supplier long enough. This proportion falls to around half of those on PPMs, aged 15-34 or from social grades DE.

Just over half (56%) identify themselves as being on a "fixed term tariff" (though, even with a revised question wording this year, it still seems likely this is an overestimate of the penetration of fixed term tariffs – see appendix). Among this group, 38% recall receiving an end of fixed term letter, up six points since last year, but essentially in the same kind of proportion. Again, recall of this is lower among the 15-34 age group, social grade DE and those who rent their homes.

Q44/46/48/50. Summary Table – Attention paid to supplier communications

	End of fixed term letter		Annual Statement		Bill or statement of account		Price increase notification letter	
Base:	*All who received an end of fixed term letter in past year*		*All who received annual statement in last year*		*All who received a bill or statement of account in last year*		*All who received a price notification letter in past year*	
	2013	*2014*	*2013*	*2014*	*2013*	*2014*	*2013*	*2014*
	(248) %	*(286) %*	*(889) %*	*(935) %*	*(1,129) %*	*(1140) %*	*(506) %*	*(443) %*
Read it in detail	53	55	40	44	40	42	39	35
Glanced over it or skim read it	37	36	49	46	46	47	47	53
Only saw what it was, but did not read it	7	6	7	6	8	7	8	8
Did not read it at all	3	3	5	4	6	4	5	4

Source: Ipsos MORI

Annual statements and bills or statements of accounts are read in detail by just over two in five of those who receive them. These percentages are slightly up on last year's figures. On the other hand, the proportion who read price increase notification letters in detail is down a similarly marginal four points. The attention paid to end of fixed term letters continues to be greater: 55% read them in detail, up a little on last year. Reliable further breakdown of these figures is not possible given the sample sizes.

The Recently Engaged group (see appendix for details of table) is most likely to read each of these communications in detail. However the Disengaged group is not always the least likely to read them in detail, as might be expected, for example both the Partially Engaged and the Lapsed Engaged are less likely to have read the price notification letter in detail. In the case of annual statements also, it is the Lapsed Engaged group that shows least interest in the detail.

Q45/47/49/51. Summary Table – Effect of supplier communications

	Annual Statement				Bill or statement of account			
	2013		2014		2013		2014	
Base:	All who read in detail/ glanced over annual statement				All who read in detail/ glanced over bill or statement of account			
	(788) %		(828) %		(969) %		(1006) %	
	Agree	Dis agree	Agree	Disagree	Agree	Dis agree	Agree	Disagree
	%	%	%	%	%	%	%	%
I understood the information	77	9	79	8	77	10	80	8
The information made me consider my energy options	43	31	46	28	39	37	40	33
I took action as a result of reading this information. For example, I looked into, or actually switched supplier, tariff or payment method*	28	52	31	47	27	55	29	52

Source: Ipsos MORI

Q45/47/49/51. Summary Table – Effect of supplier communications

	Price increase notification letter				End of fixed term letter			
	2013		2014		2013		2014	
Base:	All who read in detail/ glanced over price increase notification letter				All who read in detail/ glanced over end of fixed term letter			
	(436) %		(388) %		(220) %		(261) %	
	Agree	Dis agree	Agree	Disagree	Agree	Dis agree	Agree	Disagree
	%	%	%	%	%	%	%	%
I understood the information	79	10	81	8	81	6	90	3
The information made me consider my energy options	39	40	41	40	60	21	59	20
I took action as a result of reading this information. For example, I looked into, or actually switched supplier, tariff or payment method	24	58	23	57	49	28	51	28

Source: Ipsos MORI

The end of fixed term letter continues to be reportedly the most effective call to action of the four types of communications, as well as be most likely to inspire a consideration of energy needs. However in this latter respect, the annual statement is also fairly effective, though it does not, on balance, give rise so effectively to action in terms of comparison or switching behaviour. The price increase notification letter is less effective even than a bill or statement of account as a spur to action. Understanding is apparently strong for all four types of communication.

Appendix 14.10 shows these same figures, broken down by the four typologies, or consumer segments. The end of fixed term letter (which is reportedly most likely to inspire action among every typological group), is most likely to influence the Partially Engaged – 76% said they took action as a result of receiving such a letter, a greater proportion even than among the Recently Engaged (63%). The Lapsed Engaged group proves as difficult to influence into action by any communication as the Disengaged group, in some cases even more difficult (for example by the price increase notification letter).

12 Trust in openness and transparency of suppliers

Q52. Using the words here, please tell me the extent to which you trust or distrust energy suppliers to be open and transparent in their dealings with customers?

	Total 2014	Age			Social grade		Ethnicity		Internet access		Previous survey (all)	
		15-34	35-64	65+	AB	DE	White	BME	Yes	No	2012	2013
Base: All with mains gas or electricity who are responsible for bills	(1393) %	(284) %	(727) %	(382) %	(303) %	(352) %	(1260) %	(126) %	(1192) %	(201) %	(1,484) %	(1,433) %
Trust (completely/ tend to)	28	33	23	36	23	34	28	36	26	42	34	29
Neither	27	30	27	26	23	30	26	42	28	27	26	27
Distrust (completely/ tend to)	44	36	50	38	54	36	46	21	46	30	39	43

Source: Ipsos MORI

Distrust of energy suppliers to be open and transparent in their dealings with customers continues to outweigh trust. Currently 44% distrust suppliers in this regard, while 28% trust them. This balance has seen no significant worsening this year, and, in fact, the proportion who distrust suppliers "completely" is down a significant three points from 18% to 15%.

Only a few sub-groups trust energy suppliers on balance: quarterly direct debit payers, social grade E, BME groups and those with no internet access.

Q52. Using the words here, please tell me the extent to which you trust or distrust energy suppliers to be open and transparent in their dealings with customers?

	Total 2014	Consumer typologies (see appendix) Disengaged	Partially engaged	Lapsed engaged	Recently engaged	Previous survey (all) 2013
Base: All with mains gas or electricity who are responsible for bills	*(1393) %*	*(735) %*	*(84) %*	*(244) %*	*(330) %*	*(1,433) %*
Trust (completely/tend to)	28	34	26	17	24	29
Neither	27	29	*33*	29	22	27
Distrust (completely/tend to)	44	36	41	54	53	43

Source: Ipsos MORI

The more engaged typologies, Recently Engaged and Lapsed Engaged, are most likely to distrust the energy industry. Lower engagement tends to lead to a greater propensity to give the industry the benefit of the doubt, for example among the Disengaged 34% trust the industry and 36% distrust it.

13 Household financial stability

Q38. Which of these statements best applies to you?

	Total 2014	Tenure		Age			Social Grade		Previous surveys (all)		
		Rented	Non-rented	15-34	35-64	65+	AB	DE	2011	2012	2013
Base: All with either mains gas or electricity who are responsible for bills	*(1393) %*	*(407) %*	*(986) %*	*(284) %*	*(727) %*	*(382) %*	*(303) %*	*(352) %*	*(1,525) %*	*(1,484) %*	*(1,433) %*
I am/ We are keeping up with all the household bills without any difficulties	64	51	69	62	60	75	79	48	62	66	62
I am/ We are keeping up with all the household bills, but it is a struggle from time to time	25	29	24	24	29	20	17	32	25	23	27
I am/ We are keeping up with all the household bills, but it is a constant struggle	7	13	5	9	8	4	2	14	8	8	8
I am/ We are falling behind with some household bills	1	3	1	2	2	1	1	3	1	1	1
I am/ We are having real financial problems and have fallen behind with many bills	1	2	1	2	1	1	*	2	1	1	1

Source: Ipsos MORI

This breakdown of energy customers views on their financial stability shows no significant change in the past year and great stability over time.

APPENDICES

14 APPENDICES

14.1 Sample profile

QOG01. Do you have mains gas and/or mains electricity in your home?

	2008	2010	2011	2012	2013	2014
Base: All respondents	*(2,063)* %	*(1,992)* %	*(1,992)* %	*(1,956)* %	*(1,960)* %	*(1,971)* %
Mains gas	81	86	85	80	83	89
Mains electricity	95	95	94	94	95	97
Neither/Don't know/Refused	9	5	3	3	2	1

Source: Ipsos MORI

QOG02. Are you responsible or jointly responsible for the gas or electricity bills in your household?

	2008	2010	2011	2012	2013	2014
Base: All with mains gas or electricity	*(1,981)* %	*(1,904)* %	*(1,925)* %	*(1,884)* %	*(1,911)* %	*(1,954)* %
Yes	75	80	77	79	73	73
No	25	20	23	21	27	27

Source: Ipsos MORI

QOG04. Are you on a dual fuel deal?

	2008	2010	2011	2012	2013	2014
Base: All with mains gas and electricity who are responsible for the bill and have same supplier for both (who comprise 90% of all with mains gas and *electricity who are responsible for bills (2014))*	*(1,005)* %	*(1,144)* %	*(1,138)* %	*(1,066)* %	*(1,061)* %	*(1,098)* %
Yes	64	72	74	72	75	73
No	22	16	15	15	19	20

Source: Ipsos MORI

14.2 Methods of payment

QOG08. How do you pay for the gas you use?	2008	2010	2011	2012	2013	2014
Base: All those with mains gas who are responsible for the bill	*(1,243)* %	*(1,369)* %	*(1,331)* %	*(1,232)* %	*(1,214)* %	*(1,227)* %
Monthly direct debit	65	70	70	69	68	67
Quarterly direct debit	-	-	-	-	8	6
Pay quarterly in arrears/cheque, cash or card on receipt of bill	19	13	14	13	8	9
Prepayment meter	10	11	11	11	12	13
Fuel Direct	*	*	0	-	*	*
Weekly/fortnightly payment scheme	1	1	1	1	1	1
Payment card/book ad hoc	3	3	2	2	2	3
Other	1	1	1	2	*	*
Don't know	1	1	1	2	*	*

Source: Ipsos MORI

QOG10. How do you pay for the electricity you use?	2008	2010	2011	2012	2013	2014
Base: All those with mains electricity who are responsible for the bill	*(1,519)* %	*(1,540)* %	*(1,500)* %	*(1,461)* %	*(1,408)* %	*(1,383)* %
Monthly direct debit	64	68	70	68	65	66
Quarterly direct debit	-	-	-	-	8	6
Pay quarterly in arrears/cheque, cash or card on receipt of bill	19	15	13	13	8	10
Prepayment meter	11	12	12	12	14	15
Fuel Direct	*	*	*	-	*	*
Weekly/fortnightly payment scheme	2	1	1	1	1	1
Payment card/book ad hoc	3	3	2	2	1	2
Other	1	*	2	2	1	*
Don't know	1	1	1	1	*	*

Source: Ipsos MORI

14.3 Online tariffs

QOG09. Are you on an online tariff, that is, a gas account that you have to manage over the internet?

	2011	2012	2013	2014
Base: All who have mains gas and are responsible for the bill	*(1,331)* %	*(1,232)* %	*(1,214)* %	*(1,227)* %
Yes	21	22	27	31
No	75	73	71	67
Don't know	4	5	2	2

Source: Ipsos MORI

QOG11. Are you on an online tariff, that is, an electricity account that you have to manage over the internet?

	2011	2012	2013	2014
Base: All who have mains electricity and are responsible for the bill	*(1,500)* %	*(1,461)* %	*(1,408)* %	*(1,383)* %
Yes	19	22	25	29
No	77	73	73	69
Don't know	3	5	2	2

Source: Ipsos MORI

14.4 Fixed term tariffs

QOG07. Are you on a fixed term tariff for gas, for electricity or for both? A fixed term tariff is a tariff that has a definite end date[13]

	2013	2014
Base: All who have mains gas or electricity who are responsible for bills	*(1,433)* %	*(1,393)* %
Yes – gas	*2*	*1*
Yes – electricity	*10*	*8*
Yes - both	*41*	*47*
Yes – at least one fixed term tariff	53	56
No	39	36
Don't know	9	8

Source: Ipsos MORI

[13] Additional explanatory sentence added 2014

Despite adding a sentence of explanation that a fixed term tariff is one that has a definite end date, it seems likely this question has again overestimated the proportion of customers on fixed term tariffs. This is evident by comparison of the 56% penetration with other information available to Ofgem (see footnote 2).

14.5 Amount spent on home energy

QOG06. Approximately how much do you spend on home energy, that is electricity and mains gas (if you have it)? (per year)

		Payment method				Social Grade					Previous survey (all)
		Monthly/ Quarterly Direct Debit (gas)	PPM (gas)	Monthly/ Quarterly Direct Debit (elec)	PPM (elec)	AB	C1	C2	D	E	2013
Base: All giving numerical answer	*(1,270) %*	*(783) %*	*(167) %*	*(873) %*	*(217) %*	*(265) %*	*(396) %*	*(286) %*	*(195) %*	*(128) %*	*(1,317) %*
0-£700	**15**	11	9	14	14	12	17	13	18	15	14
£701-£1,200	**43**	46	42	45	42	37	44	48	40	52	46
£1,201-£1,500	**15**	16	12	15	13	12	15	17	16	12	15
£1,501+	**27**	27	38	26	32	38	24	22	26	21	25
MEAN	**£1276**	£1299	£1416	£1259	£1322	£1404	£1220	£1252	£1221	£1200	£1259
Base: All with mains gas or electricity	*(1,393) %*	*(875) %*	*(172) %*	*(962) %*	*(223) %*	*(303) %*	*(433) %*	*(305) %*	*(217) %*	*(135) %*	*(1,433) %*
Don't know	**9**	10	3	10	3	14	8	6	10	5	9

Source: Ipsos MORI

14.6 Current gas and electricity suppliers

QOG53. Who is your current electricity supplier?

	2013	2014
Base: All who have mains electricity and responsible for bills	(1408) %	(1,383) %
British Gas	27	26
E.ON	19	15
EDF	11	12
Scottish Power	11	12
npower	10	10
Southern Energy	7	5
SSE	3	5
Swalec	2	2
First Utility	1	2
Scottish Hydro	2	1
Co-operative Energy	*	1
Marks & Spencer Energy	*	1
Ovo	*	1
Sainsburys Energy	*	1
Spark Energy	*	*
Ecotricity	1	*
Ebico	*	*
Utility Warehouse	n/a	*
Good Energy	*	-
Other	*	*
Don't know	2	2

Source: Ipsos MORI

QOG54. Who is your current gas supplier?		
	2013	2014
Base: All who have mains gas and responsible for bills	(1214) %	(1,227) %
British Gas	35	34
E.ON	16	13
Scottish Power	10	10
EDF	8	10
npower	10	9
Southern Energy	6	5
SSE	3	4
Swalec	2	2
First Utility	1	2
Scottish Hydro	2	1
Co-operative Energy	1	1
Marks & Spencer Energy	*	1
Ovo	*	1
Sainsburys Energy	1	1
Spark Energy	*	1
Ebico	*	*
Ecotricity	1	*
Good Energy	-	*
Utility Warehouse	n/a	*
Other	*	*
Don't know	2	2

Source: Ipsos MORI

14.7 Demographics

	2014 Weighted	2014 Unweighted
Base: All respondents	*(1,973)* *%*	*(1,971)* *%*
Age		
15-34	32	33
35-64	47	45
65+	21	22
Social Group		
AB	26	20
C1	27	32
C2	22	22
DE	25	27
Region		
England	87	86
Wales	5	4
Scotland	8	9
Area		
Urban	27	29
Suburban	53	52
Rural	20	19
Internet Access		
Yes	89	87
No	11	13
Ethnic Group		
White	87	85
BME	12	15
Tenure		
Rented	28	31
Not rented	72	69
Physical/ Mental Impairment		
Yes	9	10
No	62	60

Source: Ipsos MORI

14.8 Consumer typology in relation to engagement behaviour

Consumer typologies: Engagement

	Proportions of:					
	All energy customers		Gas customers		Electricity customers	
	2013	*2014*	*2013*	*2014*	*2013*	*2014*
	(1,433) %	*(1,393)* %	*(1,214)* %	*(1,227)* %	*(1,408)* %	*(1,383)* %
Disengaged – Never switched supplier and not switched tariff/payment method in 2013/14 (either fuel)	51	52	50	50	51	52
Partially engaged – Never switched supplier and switched tariff/payment method in 2013/14 (either fuel)	9	6	9	6	9	6
Lapsed engaged – Switched before 2013 and NEITHER switched supplier in 2013/14 nor switched tariff/payment method in 2013/14 (either fuel)	19	18	19	18	19	18
Recently engaged – Either switched supplier in 2013/14 OR (switched tariff/payment method in 2013/14 (either fuel) AND switched supplier before 2013 (either fuel))	21	25	22	26	21	25

Source: Ipsos MORI

The profile of the energy customer universe in terms of its level of engagement with the market shows some marginal change this year. Most notably, the Recently Engaged, the segment with the highest levels of switching of supplier and/or tariff/payment method, has grown by four percentage points since 2013 and now comprises 25% of all energy consumers. The Partially Engaged group, by contrast, is down three points to 6%, which may be a reflection of their role as a transitionary segment between Disengaged and Recently Engaged. There is no significant difference in the size of the Disengaged and Lapsed Engaged segments between 2013 and 2014.

14.9 Attention paid to supplier communications, by typology

Q44/46/48/50. Summary Table – Attention paid to supplier communications by typology

	End of fixed term letter		Annual Statement		Bill or statement of account		Price increase notification letter	
Base: All	*All who received an end of fixed term letter in past year*		*All who received annual statement in last year*		*All who received a bill or statement of account in last year*		*All who received a price notification letter in past year*	
	2013	*2014*	*2013*	*2014*	*2013*	*2014*	*2013*	*2014*
Disengaged group	*(113) %*	*(118) %*	*(425) %*	*(449) %*	*(546) %*	*(558) %*	*(271) %*	*(242) %*
Read it in detail	46	50	37	45	37	40	41	37
Glanced over it or skim read it	43	38	48	44	46	46	45	52
Only saw what it was, but did not read it	7	9	9	6	8	8	10	7
Did not read it at all	4	3	6	5	8	5	5	4
Partially engaged group	*(32) %*	*(24) %*	*(72) %*	*(63) %*	*(96) %*	*(73) %*	*(41) %*	*(28) %*
Read it in detail	64	57	48	41	44	41	41	27
Glanced over it or skim read it	23	25	39	45	37	46	43	64
Only saw what it was, but did not read it	10	9	4	8	10	6	11	6
Did not read it at all	4	9	9	6	9	6	5	3
Lapsed engaged group	*(31) %*	*(42) %*	*(204) %*	*(189) %*	*(246) %*	*(213) %*	*(114) %*	*(100) %*
Read it in detail	58	55	39	39	43	43	36	25
Glanced over it or skim read it	29	32	59	51	47	48	52	63
Only saw what it was, but did not read it	13	9	6	4	6	5	9	8
Did not read it at all	0	4	3	6	4	5	4	5
Recently engaged group	*(72) %*	*(102) %*	*(188) %*	*(234) %*	*(241) %*	*(296) %*	*(80) %*	*(73) %*
Read it in detail	55	61	43	47	42	46	40	46
Glanced over it or skim read it	38	37	50	45	48	46	52	43
Only saw what it was, but did not read it	3	1	4	6	8	6	4	10
Did not read it at all	3	1	3	1	2	3	4	1

Source: Ipsos MORI

14.10 Effect of supplier communications by typology

Q45/47/49/51. Summary Table – Effect of supplier communications by typology

	Annual Statement				Bill or statement of account			
	2013		2014		2013		2014	
	Agree	Disagree	Agree	Disagree	Agree	Disagree	Agree	Disagree
	All who read in detail/ glanced over annual statement				*All who read in detail/ glanced over bill or statement of account*			
Disengaged group	*(362) %*		*(391) %*		*(452) %*		*(478) %*	
I understood the information	74	11	77	9	71	12	79	8
The information made me consider my energy options	39	33	37	34	32	40	32	40
I took action as a result of reading this information. For example, I looked into, or actually switched supplier, tariff or payment method	21	55	22	52	24	55	20	59
Partially engaged group	*(64) %*		*(53) %*		*(78) %*		*(63) %*	
I understood the information	83	10	79	6	80	5	86	10
The information made me consider my energy options	44	30	61	14	46	33	44	30
I took action as a result of reading this information. For example, I looked into, or actually switched supplier, tariff or payment method	26	48	41	32	29	50	34	41
Lapsed engaged group	*(189) %*		*(168) %*		*(223) %*		*(193) %*	
I understood the information	82	7	79	7	84	5	75	11
The information made me consider my energy options	41	37	36	37	38	41	34	38
I took action as a result of reading this information. For example, I looked into, or actually switched supplier, tariff or payment method	24	60	22	61	20	63	19	66
Recently engaged group	*(173) %*		*(216) %*		*(216) %*		*(272) %*	
I understood the information	76	10	83	7	80	11	84	6
The information made me consider my energy options	54	22	67	13	49	29	59	21
I took action as a result of reading this information. For example, I looked into, or actually switched supplier, tariff or payment method	46	36	50	31	38	47	49	33

Source: Ipsos MORI

Q45/47/49/51. Summary Table – Effect of supplier communications by typology

	Price increase notification letter				End of fixed term letter			
	2013		*2014*		*2013*		*2014*	
	Agree	Disagree	Agree	Disagree	Agree	Disagree	Agree	Disagree
	All who read in detail/ glanced over price increase notification letter				*All who read in detail/ glanced over end of fixed term letter*			
Disengaged group	*(228) %*		*(211) %*		*(99) %*		*(103) %*	
I understood the information	76	12	85	6	74	9	90	2
The information made me consider my energy options	34	44	37	44	47	29	44	27
I took action as a result of reading this information. For example, I looked into, or actually switched supplier, tariff or payment method	21	57	19	63	39	39	39	35
Partially engaged group	*(35) %*		*(25) %*		*(27) %*		*(20) %*	
I understood the information	71	13	72	8	82	7	80	-
The information made me consider my energy options	42	37	35	31	60	16	60	13
I took action as a result of reading this information. For example, I looked into, or actually switched supplier, tariff or payment method	29	51	31	36	49	26	76	13
Lapsed engaged group	*(101) %*		*(87) %*		*(28) %*		*(38) %*	
I understood the information	88	5	76	9	90	0	96	-
The information made me consider my energy options	35	39	38	43	64	10	60	23
I took action as a result of reading this information. For example, I looked into, or actually switched supplier, tariff or payment method	22	67	15	67	35	28	39	41
Recently engaged group	*(72) %*		*(65) %*		*(66) %*		*(100) %*	
I understood the information	77	12	78	11	88	9	89	5
The information made me consider my energy options	54	34	58	24	74	15	73	14
I took action as a result of reading this information. For example, I looked into, or actually switched supplier, tariff or payment method	37	51	44	33	67	15	63	19

Source: Ipsos MORI

QUESTIONNAIRE AND TOPLINE RESULTS

15 QUESTIONNAIRE AND TOPLINE RESULTS

Ofgem Switching Omnibus (Customer Engagement Tracker) Survey 2014

Topline Results

- This topline shows the results for a face-to-face survey conducted among a representative quota sample of 1971 residents of Great Britain in the period 7-17th March 2014. Comparisons, where available, are shown with surveys in 2013, 2012, 2011 and 2010
- 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

OG01. **Do you have mains gas and/or mains electricity in your home?**

	March '10	January '11	March '12	March '13	March '14
	%	%	%	%	%
Yes – Mains electricity	95	94	94	95	97
Yes – Mains gas	86	85	80	83	89
No – Neither	2	1	2	2	1
Don't know	1	1	1	*	*
Refused	2	1	1	-	-

Base: All respondents (1,971)

OG02. **Are you responsible or jointly responsible for the gas or electricity bills in your household?**

	March '10	January '11	March '12	March '13	March '14
	%	%	%	%	%
Yes	80	77	79	73	73
No	20	23	21	27	27

Base: All who have mains electricity and/or gas (1,954)

OG03. **Do you have the same supplier for both electricity and gas?**

	March '10	January '11	March '12	March '13	March '14
	%	%	%	%	%
Yes	84	87	88	90	90
No	14	12	10	10	8
Don't know	2	2	2	1	1

Base: All who have both mains electricity and gas, and are responsible for bills (1,217)

OG04. **IF YES: Are you on a dual fuel deal?**

	March '10 %	January '11 %	March '12 %	March '13 %	March '14 %
Yes	72	74	72	75	73
No	16	15	15	19	20
Don't know	12	11	14	6	8

Base: All with same supplier for both fuels (1,098)

OG05. **In the last year, have you received information from your supplier about:**

		January '11 %	March '12 %	March '13 %	March '14 %
The name of the tariff you are on (your tariff is the pricing plan for the electricity and/or gas you use)?	Yes	42	48	54	59
	No	40	37	42	35
	Don't know	18	15	4	6
Any changes to your tariff?	Yes	45	40	40	43
	No	44	48	56	52
	Don't know	11	12	4	5
The forecast cost of your energy consumption over the coming year	Yes	45	44	47	52
	No	44	43	48	43
	Don't know	11	13	4	6

Base: All with gas or electricity who are responsible or jointly responsible for bills (1,393)

OG06. **Approximately how much do you spend on home energy, that is electricity and mains gas (if you have it)? You may answer per year, per month or per week if you prefer, but it needs to be on average for the whole year, including the winter. (Replies translated into annual figures)**

	March '12 %	March '13 %	March '14 %
0-£700	17	13	13
£701-£1200	40	42	39
£1201-£1500	12	13	13
£1501+	19	23	25
Don't know	13	9	9
Mean	£1,259	£1,258	£1,276

Base: All responsible or jointly responsible for bills (1,393)

OG07. **Are you on a fixed term tariff for gas, for electricity or for both? A fixed term tariff is a tariff that has a definite end date**[14]

	March '12 %	March '13 %	March '14 %
Yes – gas		2	1
Yes – electricity	n/a	10	8
Yes (either)	38	53	56
Yes - both	n/a	41	47
No	42	39	36
Don't know	21	9	8

Base: All responsible or jointly responsible for bills (1,393)

OG08. **How do you pay for the gas you use?**

	March '10 %	January '11 %	March '12 %	March '13 %	March '14 %
Monthly Direct Debit	70	70	69	68	67
Quarterly Direct Debit	-	-	-	8	6
Pay by cheque, cash or card on receipt of your bill	13	14	13	8	9
Prepayment Meter	11	11	11	12	13
Fuel Direct (where a set amount is deducted from your benefits before you receive them)	*	-	-	*	*
Weekly/Fortnightly payment scheme	1	1	1	1	1
Payment card/book that I use whenever I choose (Ad Hoc)	3	2	2	2	3
Other	1	1	2	*	*
Don't know	1	1	2	*	*

Base: All with mains gas and responsible for bill (1,227)

OG09. **Are you on an online tariff, that is, a gas account that you have to manage over the internet?**

	March '10 %	January '11 %	March '12 %	March '13 %	March '14 %
Yes	12	21	22	27	31
No	85	75	73	71	67
Don't know	3	4	5	2	2

Base: All those who have mains gas in their home and are responsible for the bill (1,227)

[14] In 2013 questionnaire, question read: 'Are you on a fixed term tariff for gas, for electricity or for both?'

OG10. **How do you pay for the electricity you use?**

	March '10 %	January '11 %	March '12 %	March '13 %	March '14 %
Monthly Direct Debit	68	70	68	65	66
Quarterly Direct Debit	-	-	-	8	6
Pay by cheque, cash or card on receipt of your bill	15	13	13	8	10
Prepayment Meter	12	12	12	14	15
Fuel Direct (where a set amount is deducted from your benefits before you receive them)	*	*	-	*	*
Weekly/Fortnightly payment scheme	1	1	1	1	1
Payment card/book that I use whenever I choose (Ad Hoc)	3	2	2	1	2
Other	*	2	2	1	*
Don't know	1	1	1	*	*

Base: All with mains electricity and responsible for bill (1,383)

OG11. **Are you on an online tariff, that is, an electricity account you have to manage over the internet?**

	March '10 %	January '11 %	March '12 %	March '13 %	March '14 %
Yes	12	19	22	25	29
No	85	77	73	73	69
Don't know	3	3	5	2	2

Base: All with mains electricity and responsible for bill (1,383)

OG12a. **Did you switch your gas supplier in 2013?**[15]

	March '10 %	January '11 %	March '12 %	March '13 %	March '14 %
Yes	17	15	13	11	13
No/Don't know	83	85	87	89	87

Base: All with mains gas and responsible for bill (1,227)

OG12b. **And have you switched your gas supplier so far in 2014?**[16]

	March '12 %	March '13 %	March '14 %
Yes	4	3	4
No/Don't know	96	97	96

Base: All with mains gas and responsible for bill (1,227)

OG13. **Did you switch your gas supplier at any time before 2013?**[17]

	March '10 %	January '11 %	March '12 %	March '13 %	March '14 %
Yes	32	30	27	28	30
No/ Don't know	68	70	73	72	70

Base: All who did not switch gas supplier during 2013/2014 (1,043)

[15] In 2013 questionnaire, question read: 'Did you switch your gas supplier in 2012?'
[16] In 2013 questionnaire, question read: 'And have you switched your gas supplier so far in 2013?'
[17] In 2013 questionnaire, question read: 'Did you switch your gas supplier at any time before 2012?' but in 2012 it read: 'Did you switch your gas supplier before 2011?

OG14. **How many times have you ever switched your gas supplier?**

	March '10 %	January '11 %	March '12 %	March '13 %	March '14 %
Once	49	56	44	38	37
Twice	26	21	19	25	26
Three times ("or more" - before 2011)	25	12	21	19	18
Four times or more		11	15	17	20

Base: All who have ever switched gas supplier (496)

OG15a. **Even though you stayed with the same gas supplier in 2013 and so far in 2014, did you change the tariff you have with them or the method by which you pay them?**

	March '10 %	January '11 %	March '12 %	March '13 %	March '14 %
Yes – changed tariff			9	11	12
Yes – changed payment method			4	5	4
Yes (either)	10	12	12	16	15
No	88	84	88*	85*	85*
Don't Know	2	4			

Base: All who have not switched gas supplier in 2013/14 (1,043) * No/DK combined in 2012, 2013 & 2014

OG15b. **When you switched gas supplier in 2013 or 2014, did you also change your payment method at the same time?**

	March '13 %	March '14 %
Yes	15	9
No/Don't know	85	91

Base: All those who switched gas supplier during 2013/2014 (184)

OG15c. **What method of payment for gas did you change from?**

	March '12 %	March '13 %	March '14 %
Monthly Direct Debit	6	6	5
Quarterly Direct Debit	n/a	6	8
Pay by cheque, cash or card on receipt of your bill	10	12	6
Prepayment Meter	3	1	1
Fuel Direct (where a set amount is deducted from your benefits before you receive them)	-	-	-
Weekly/Fortnightly payment scheme	1	1	-
Payment card/book that I use whenever I choose (Ad Hoc)	-	-	1
Other (Please specify)	1	2	2
Did not change payment method	70	71	76
Don't know	8	-	-

Base: All those who have changed tariff or payment method for gas in past year (175)

OG16a. **Did you switch your electricity supplier in 2013[18]?**

	March '10	January '11	March '12	March '13	March '14
	%	%	%	%	%
Yes	18	17	14	12	13
No/Don't know	82	83	86	88	87

Base: All who have mains electricity and are responsible for bill (1,383)

OG16b. **And have you switched your electricity supplier so far in 2014[19]?**

	March '12	March '13	March '14
	%	%	%
Yes	3	2	4
No/Don't know	97	98	96

Base: All who have mains electricity and are responsible for bill (1,383)

OG17. **Did you switch your electricity supplier at any time before 2013[20]?**

	March '10	January '11	March '12	March '13	March '14
	%	%	%	%	%
Yes	30	28	24	29	27
No	70	72	76	71	73

Base: All who did not switch electricity supplier in 2013/14 (1,171)

OG18. **How many times have you <u>ever</u> switched your electricity supplier?**

	March '10	January '11	March '12	March '13	March '14
	%	%	%	%	%
Once	46	56	44	42	35
Twice	27	20	22	23	26
Three times ("or more" -before 2011)	26	14	20	19	18
Four times or more		10	15	16	22

Base: All who have ever switched electricity supplier (519)

OG19a. **Even though you stayed with the same electricity supplier in 2013 and so far in 2014, did you change the tariff you have with them or the method by which you pay them?**

	March '10	January '11	March '12	March '13	March '14
	%	%	%	%	%
Yes – changed tariff			10	10	10
Yes – changed payment method			3	6	3
Yes (either)	8	10	12	16	13
No	89	86	88*	85*	87*
Don't Know	2	3			

Base: All who have not switched electricity supplier in 2013/14 (1,171) * No/DK combined in 2012, 2013 & 2014

[18] In 2013 questionnaire, question read: 'Did you switch your electricity supplier in 2012?'
[19] In 2013 questionnaire, question read: 'And have you switched your electricity supplier so far in 2013?'
[20] In 2013 questionnaire, question read: 'Did you switch your electricity supplier at any time before 2012?' but in 2012 it read: 'Did you switch your electricity supplier before 2011?

OG19b. **When you switched electricity supplier in 2013 or 2014, did you also change your payment method at the same time?**[21]

	March '13	March '14
	%	%
Yes	16	12
No/Don't know	84	88

Base: All who have switched electricity supplier in 2013/14 (212)

OG19c. **What method of payment for electricity did you change from?**

	March '12	March '13	March '14
	%	%	%
Monthly Direct Debit	4	6	5
Quarterly Direct Debit[22]		6	7
Pay by cheque, cash or card on receipt of your bill	14	15	9
Prepayment Meter	2	3	2
Fuel Direct (where a set amount is deducted from your benefits before you receive them)	-	-	-
Weekly/Fortnightly payment scheme	-	*	-
Payment card/book that I use whenever I choose (Ad Hoc)	1	-	1
Other (Please specify)	1	2	1
Did not change payment method	74	66	75
Don't know	4	-	-

Base: All those who have changed tariff or payment method for electricity in past year (184)

Summary 1

	March '08	March '10	January '11	March '12	March '13	March '14
	%	%	%	%	%	%
Ever switched gas supplier	43	43	41	37	38	42
Ever switched electricity supplier	40	42	40	35	38	39

Base: All who have each fuel and pay bills (1227 gas, 1383 electricity)

Summary 2

	March '08	March '10	January '11	March '12	March '13	March '14
	%	%	%	%	%	%
Switched either fuel in last year*	21	19	18	15	14	14
Switched either fuel ever	45	46	43	38	40	42

Base: All with either fuel and pay bills (1393) *last year refers to 2013 for March 2014 survey

[21] New question introduced in 2013
[22] New code introduced in 2013

OG20. **Did you know it was possible to change to a different tariff or method of payment with your current supplier?**

	March '12 %	March '13 %	March '14 %
Yes – knew possible to change tariff*		34	23
Yes - knew possible to change method of payment*		5	5
Yes – knew possible to change both*		43	53
Yes (either)	68	82	81
No	28	17	18
Don't know	5	1	1

Base: All those who have not changed gas or electricity tariff or payment method (1,191) *before 2013, 'Yes' option was not segmented 3 ways

OG21. **Did you know it was possible to switch to a different gas or electricity supplier?**

	March '10 %	January '11 %	March '12 %	March '13 %	March '14 %
Yes (either)	83	87	82	84	84
Yes – knew possible to switch both			79	77	78
Yes- electricity but not gas			2	2	2
Yes- gas but not electricity			1	5	3
No	14	10	16	16	15
Don't know	4	3	3	1	1

Base: All who have never switched either (819)

OG22. **For each of the items here could you please say which of them, if any, apply to you?**

	January '11 %	March '12 %	March '13 %	March '14 %
I'm happy with my current supplier/s	77	78	55	56
I've checked prices of other suppliers and I think I'm on the best deal[23]	13	9	12	11
I don't think there is any difference between the suppliers to make switching worthwhile[24]	20	13	17	21
Switching is a hassle	22	20	27	30
I am unsure about where to get information to help me make a good choice	4	2	6	4
I am in debt with my current supplier/s so don't think I can switch	1	1	2	2
I live in rented accommodation and don't think my landlord will allow me to switch[25]	3	3	3	4
I wouldn't know how to switch even if I wanted to	2	3	4	3
My supplier has told me I can't switch	n/a	1	2	2

Base: All who have never switched either (819)

[23] 2011 wording: ...and I think I'm on a good deal
[24] 2011 wording: I don't think there is much difference...
[25] 2011 wording: I live in a rented house and I don't think my landlord would allow me to switch

OG23. **Thinking about the <u>last time</u> you switched your gas supplier, what was the main trigger causing you to switch?**

	March '10 %	January '11 %	March '12 %	March '13 %	March '14 %
Believed new supplier was cheaper/to save money	78	79	76	75	70
Believed new supplier offered better customer service	6	7	5	6	4
Believed new supplier offered better benefits (e.g. loyalty points)			2	1	*
Wanted a dual fuel package	6	4	5	4	3
Wanted a fixed-price deal	3	1	2	2	6
Wanted a "greener" tariff [26]	1	1	*	1	1
Wanted an online tariff	*	1	0	*	*
Written communication from your supplier	0	0	*	-	-
Moved home[27]	0	0	3	6	10
Poor service#	0	0	1	*	-
Salesman calling at house#	-	-	-	1	1
Other	1	1	1	2	2
Don't know	2	2	1	1	1

Base: All who have gas and are responsible for bill and have ever switched gas supplier (496) # Codes added post-fieldwork

[26] 2011 wording: Wanted to switch to a "greener" environmentally friendly tariff or supplier
[27] New code introduced in 2013

OG24. **Thinking about the last time you switched gas supplier, how did you find out about the deals offered by the supplier you switched to? [unprompted]**

	March '10	January '11	March '12	March '13	March '14
	%	%	%	%	%
Supplier/representative knocked at my door[28]	33	31	23	19	13
Used an on-line/website price comparison service (e.g. USwitch, Money Supermarket)	26	21	34	35	40
New supplier phoned me[29]	8	7	6	5	5
I spoke to a salesperson in street/shopping centre/public place	7	7	10	7	7
A friend or family member told me about it	7	6	6	6	5
I saw an advert	5	4	2	3	5
I phoned a comparison service	4	7	4	4	4
I looked at the websites of more than one supplier	4	3	3	7	5
I rang them only	2	3	4	4	3
I looked at the supplier's own website only	1	4	3	3	2
I rang them and other suppliers	1	2	3	3	3
Written communication or marketing material from your supplier[30]	-	-	1	1	2
Through a collective (group) switching campaign organised by a third party (e.g. council/charity/housing association, Big Switch, ready to Switch etc)[31]	-	-	-	1	2
Other	5	5	4	7	5
Don't know	3	4	4	2	3

Base: All ever switched gas supplier (496)

[28] 2011 wording: They knocked on my door
[29] 2011 wording: They phoned me
[30] 2012 wording: Written communication or marketing material
[31] New statement introduced in 2013

OG25. **Thinking about the last time you switched gas supplier, how did you switch? [unprompted]**

	January '11	March '12	March '13	March '14
	%	%	%	%
On-line price comparison service	16	27	26	31
Telephone price comparison service	2	5	4	3
Phoning supplier	25	24	29	27
Through the supplier's website	4	4	5	7
Through a salesperson who knocked at my door	29	24	19	15
Through a salesperson in the street/shopping centre/other public place	6	7	7	5
Written communications [32]	1	1	2	1
Through a collective (group) switching campaign organised by a third party (e.g. council/charity/housing association, Big Switch, ready to Switch etc)[33]	-	-	1	2
Other	2	7	5	6
Don't know	6	3	3	2

Base: All ever switched gas supplier (496)

OG26. **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 '10	January '11	March '12	March '13	March '14
	%	%	%	%	%
Yes	64	62	72	68	69
No	14	12	17	19	20
Don't know/Not sure	22	26	11	13*	10

Base: All who ever switched gas supplier to save money (350) *2013 & 2014 code 'Don't know' only

OG27a. **How much do you agree or disagree with the following statements:**
I found it easy to decide which deal to switch my gas to

	March '10	January '11	March '12	March '13	March '14
	%	%	%	%	%
Agree strongly	29	32	34	34	30
Tend to agree	43	45	38	35	38
Neither agree nor disagree	13	8	9	11	13
Tend to disagree	9	10	11	13	14
Disagree strongly	4	3	6	6	5
Don't know	1	2	2	*	*

Base: All with gas who have ever switched (496)

32 2011 wording: By letter/mail
33 New statement introduced in 2013

OG27b. ***I am confident that I fully understand the key features of the deal I switched to***

	March '10	January '11	March '12	March '13	March '14
	%	%	%	%	%
Agree strongly	31	35	37	38	37
Tend to agree	45	41	37	34	39
Neither agree nor disagree	10	11	7	10	10
Tend to disagree	9	8	13	14	10
Disagree strongly	4	4	6	4	4
Don't know	1	1	1	-	*

Base: All with gas who have ever switched (496)

OG27c. ***I would be confident that if I switched again, I would make the right choice for me***

	March '12	March '13	March '14
	%	%	%
Agree strongly	38	38	35
Tend to agree	34	32	36
Neither agree nor disagree	9	15	15
Tend to disagree	12	11	9
Disagree strongly	6	4	4
Don't know	2	*	1

Base: All with gas who have ever switched (496)

OG28. **Thinking about the last time you switched your electricity supplier, what was the main trigger causing you to switch?**

	March '10	January '11	March '12	March '13	March '14
	%	%	%	%	%
Believed new supplier was cheaper/to save money	77	77	77	76	72
Believed new supplier offered better customer service	7	7	5	5	4
Wanted a dual fuel package	6	5	5	4	4
Wanted a fixed-price deal	4	2	1	2	6
Wanted a greener tariff [34]	1	2	1	1	1
Believed new supplier offered better benefits (e.g. Loyalty points)	-	-	2	1	*
Written communication from your supplier	-	-	*	*	*
Wanted an online tariff	*	*	*	*	*
Moved home[35]	-	-	3	5	8
Poor service#	-	-	1	1	-
New tenant#	-	-	*	-	-
Was on a meter#	-	-	*	*	*
Dispute with supplier#	-	-	*	1	-
Salesman calling at house#	-	-	-	1	1
Other	1	1	1	2	2
No answer	-	-	1	*	1
Don't know	1	2	2	*	1

Base: All who have electricity and are responsible for bill and have ever switched electricity supplier (519) # Codes added post-fieldwork

[34] 2011 wording: Wanted to switch to a "greener" environmentally friendly tariff or supplier
[35] New statement introduced in 2013

OG29. **Thinking about the last time you switched electricity supplier, how did you find out about the deals offered by the supplier you switched to? [unprompted]**

	March '10	January '11	March '12	March '13	March '14
	%	%	%	%	%
Used an on-line/website price comparison service (e.g. USwitch, Money Supermarket)	27	24	31	37	40
Phoned a comparison service	3	5	5	4	4
Looked at the supplier's own website only	2	4	4	2	4
Looked at the websites of more than one supplier	3	2	3	5	5
Supplier representative knocked at my door[36]	34	29	22	17	12
Spoke to a salesperson in street/shopping centre/public place	6	7	7	7	8
New supplier phoned me[37]	8	9	8	4	5
I saw an advert	4	5	5	3	3
I rang them only	2	4	4	5	4
I rang them and other suppliers	2	2	3	4	3
A friend or family member told me about it	7	6	5	6	6
Written communication or marketing material from your supplier[38]	-	-	1	3	2
Through a collective (group) switching campaign organised by a third party (e.g. council/charity/housing association, Big Switch, ready to Switch etc)[39]				1	2
Other	6	5	3	7	4
Don't know	2	4	3	2	2

Base: All who have ever switched electricity supplier (519)

OG30. **Thinking about the last time you switched electricity supplier, how did you switch? [unprompted]**

	January '11	March '12	March '13	March '14
	%	%	%	%
Online price comparison site	16	25	26	31
Telephone price comparison service	2	5	3	3
Phoning supplier	28	30	29	27
Through supplier's website	5	4	6	9
Through salesperson who knocked on my door	28	23	17	14
Through a salesperson in the street/shopping centre/other public place	5	7	7	5
Written communications[40]	1	2	3	2
Through a collective (group) switching campaign organised by a third party (e.g. council/charity/housing association, Big Switch, ready to Switch etc)[41]			1	1
Other	-	4	5	6
Don't know	6	2	2	2

Base: All those who have ever switched electricity supplier (519)

[36] 2011 wording: They knocked at my door
[37] 2011 wording: They phoned me
[38] 2012 wording: Written communication or marketing material
[39] New statement introduced in 2013
[40] 2011 wording: By letter/mail, 2012 wording: written communication
[41] New statement introduced in 2013

OG31. **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 '10	January '11	March '12	March '13	March '14
	%	%	%	%	%
Yes	67	64	73	70	73
No	12	11	13	20	19
Don't know/Not sure	21	25	14	10	8

Base: All who have ever switched electricity supplier to save money (374)

OG32a. **How much do you agree or disagree with the following statements:**
I found it easy to decide which deal to switch my electricity to

	March '10	January '11	March '12	March '13	March '14
	%	%	%	%	%
Agree strongly	31	31	39	38	35
Tend to agree	43	46	36	30	37
Neither agree nor disagree	11	8	7	12	10
Tend to disagree	9	8	10	14	12
Disagree strongly	4	3	7	5	6
Don't know	1	2	2	*	*

Base: All with electricity who have ever switched (519)

OG32b. ***I am confident that I fully understand the key features of the deal I switched to***

	March '10	January '11	March '12	March '13	March '14
	%	%	%	%	%
Agree strongly	32	34	38	40	39
Tend to agree	46	44	36	33	37
Neither agree nor disagree	10	9	7	10	8
Tend to disagree	8	8	11	13	10
Disagree strongly	3	4	6	3	6
Don't know	1	2	2	-	*

Base: All with electricity who have ever switched (519)

OG32c. ***I would be confident that if I switched again, I would make the right choice for me***

	March '12	March '13	March '14
	%	%	%
Agree strongly	40	39	38
Tend to agree	34	33	38
Neither agree nor disagree	8	13	9
Tend to disagree	12	10	10
Disagree strongly	6	5	4
Don't know	2	-	1

Base: All with electricity who have ever switched (519)

OG33. **Thinking about the last time you changed your tariff or payment method (without switching supplier), what was the main trigger causing you to change it?**

	March '12 %	March '13 %	March '14 %
Believed new tariff or method was cheaper/to save money	62	58	58
Believed new tariff or method offered better benefits, for example loyalty points or a maintenance contract	7	6	2
Wanted a dual fuel package	3	4	4
Wanted a fixed price deal	5	8	6
Wanted a green tariff	2	1	*
Wanted an online tariff	1	1	2
Written communication or marketing materials from your supplier	2	1	1
Moved home[42]	1	7	9
Convenience#	1	3	-
Contract/fixed rate ended#	-	-	5
Other	6	3	5
Don't know	7	5	4

Base: All who have gas or electricity and have changed tariff or payment method in 2013/2014 (202)
Code added post fieldwork

OG34. **How did you find out about the tariff or payment method you changed to?**

	March '12 %	March '13 %	March '14 %
Used an online/website price comparison service	26	24	28
Phoned a comparison service	7	4	6
Looked at supplier's own website only	4	4	7
Looked at websites of more than one supplier	5	2	5
Supplier representative knocked at my door	12	8	6
Spoke to a salesperson in the street/shopping centre/other public place	5	3	3
They phoned me	8	8	6
I saw an advert	2	4	3
I rang them only	7	17	8
I rang them and other suppliers	2	5	5
A friend or family member told me about it	3	4	3
Written communication or marketing material from your supplier[43]	13	7	13
Other	5	8	10
Don't know	7	5	3

Base: All who have gas or electricity and have changed tariff or payment method in 2013/2014 (202)

[42] New statement introduced in 2013
[43] 2012 wording: Written communication or marketing material

OG35. **Thinking about the last time you changed your tariff or payment method with your supplier, how did you change it?**

	March '12	March '13	March '14
	%	%	%
Online price comparison service	17	20	21
Telephone price comparison service	7	5	6
Phoning supplier	34	42	38
Through the supplier's website	7	4	8
Through a salesperson who knocked at my door	11	10	8
Through a salesperson in the street/shopping centre/other public place	3	3	2
Written communications	6	4	7
Other	8	7	7
Don't know	7	4	4

Base: All who have gas or electricity and have changed tariff or payment method in 2013/2014 (202)

OG36. **What would be the minimum amount of money you would have to save per year in order for it to encourage you to switch your gas or electricity supplier? Just approximately (Converted to annual figures)**

	March '12	March '13	March '14
	%	%	%
Not about saving money – other factors more important	15	12	16
0-£50	11	14	12
£51-£100	14	16	17
£101-£200	13	13	12
£201+	10	7	9
Refused	2	2	2
Don't know	35	36	32
Mean	£167	£152	£158
Median	-	£94	£99

Base: All who have never switched either gas or electricity (819)

OG37. **On the last occasion, when you decided to switch your supplier how much did you expect to save per year? Just approximately. (Converted to annual figures)**

	March '12	March '13	March '14
	%	%	%
Not about saving money – other factors more important	8	11	11
0-£50	7	8	9
£51-£100	15	17	16
£101-£200	18	17	17
£201+	10	7	10
Refused	-	*	*
Don't know	42	40	37
Mean	£173	£195	£167
Median	-	£100	£111

Base: All who have ever switched either gas or electricity (574)

OG38. **Which of these statements best applies to you?**

	March '10 %	January '11 %	March '12 %	March '13 %	March '14 %
I am/we are keeping up with all the household bills without any difficulties	63	62	66	62	64
I am/we are keeping up with all the household bills, but it is a struggle from time to time	25	25	23	27	25
I am/we are keeping up with all the household bills, but it is a constant struggle	9	8	8	8	7
I am/we are falling behind with some household bills	1	1	1	1	1
I am/we are having real financial problems and have fallen behind with many bills	1	1	1	1	1
Don't know	2	2	2	*	1

Base: All with mains electricity or gas and responsible for bills (1,393)

OG39. **Using the answers here, how easy or difficult do you believe it is to compare different tariffs for electricity or gas?[44]**

	March '13 %	March '14 %
Very easy	13	13
Fairly easy	23	29
Neither easy nor difficult	24	21
Fairly difficult	22	20
Very difficult	15	12
Don't know	3	4

Base: All with mains electricity or gas and responsible for bills (1,393)

OG40. **What is it that makes them difficult to compare?[45]**

	March '13 %	March '14 %
Difficult to understand/complicated/not clear	31	26
Too many tariffs/ multiple rates/ structures/ choices	23	16
Hard to compare like for like	11	21
Not standardised information/ difficult deals/ prices in different formats	8	-
Too much jargon/ technical language/ terminology used	8	9
Other	8	6
Don't know	6	7

Base: All those who answered 'very/fairly difficult' at OG39 (457)

[44] New question introduced in 2013
[45] New question introduced in 2013 (Main answer codes only)

OG41. **Thinking about the number of different tariffs available to you, in your view, are there the right number of energy tariffs available, or are there too many tariffs or too few tariffs?**[46]

	March '13	March '14
	%	%
The right number of tariffs	20	21
Too many tariffs	62	62
Too few tariffs	5	4
Don't know	14	12

Base: All those with mains electricity or gas and responsible for bills (1,393)

OG42. **To what extent would you say you understand the range of different energy tariffs available to you?**[47]

	March '13	March '14
	%	%
Completely	10	9
A fair amount	35	41
Not very much	35	34
Not at all	19	13
Don't know	2	3

Base: All with either mains gas or electricity who are responsible for bills (1,393)

[46] New question introduced in 2013
[47] New question introduced in 2013

OG43. **Please tell me if you recall receiving any of the following in the last year? You may have received these via post or email.**[48]

A. An annual statement (A yearly statement containing details about your own energy tariff and energy use)

	March '13	March '14
	%	%
Yes	63	67
No	34	30
Don't know	4	3

Base: All those with mains electricity or gas and responsible for bills (1,393)

B. At least one bill or statement of account

	March '13	March '14
	%	%
Yes	80	83
No	18	15
Don't know	1	2

Base: All those with mains electricity or gas and responsible for bills (1,393)

C. A price increase notification letter (A letter informing you that how much you pay for your energy will be increasing and outlining your options as a consumer.)

	March '13	March '14
	%	%
Yes	62	59
No	34	36
Don't know	5	5

Base: All not on fixed term contract for both electricity and gas (756)

D. An end of fixed term letter (A letter informing you your fixed term tariff is coming to an end)

	March '13	March '14
	%	%
Yes	32	38
No	66	59
Don't know	2	3

Base: All on fixed term for at least one fuel (748)

OG44. **Thinking about the last annual statement you received, in how much detail did you look at it?**[49]

	March '13	March '14
	%	%
Read it in detail	40	44
Glanced over it or skim read it	49	46
Only saw what it was, but did not read it	7	6
Did not read it at all	5	4

Base: All received annual statement in the last year (935)

OG45. Thinking about last **annual statement** you received, to what extent do you agree or disagree with the following statements?[50]

48 New question introduced in 2013
49 New question introduced in 2013
50 New question introduced in 2013

			Strongly agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Strongly disagree	No opinion/ don't know
A)	I understood the information	2014	35	44	13	6	1	*
		2013	34	43	14	7	2	-
B)	The information made me consider my energy options	2014	14	32	26	18	10	1
		2013	15	28	25	18	14	-
C)	I took action as a result of reading this information. For example I looked into, or actually switched supplier, tariff or payment method	2014	13	17	22	22	25	*
		2013	12	16	20	23	29	-

Base: All read in detail /glanced over annual statement (788) 2013, (828) 2014

OG46. Thinking about the last **bill or statement of account** you received, in how much detail did you look at it?[51]

	March '13 %	March '14 %
Read it in detail	40	42
Glanced over it or skim read it	46	47
Only saw what it was, but did not read it	8	7
Did not read it at all	6	4

Base: All received bill or statement of account in last year (1,140)

[51] New question introduced in 2013

OG47. Thinking about last **bill or statement of account** you received, to what extent do you agree or disagree with the following statements?[52]

			Strongly agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Strongly disagree	No opinion/ don't know
A)	I understood the information	2014	35	45	11	6	2	*
		2013	36	41	13	7	2	-
B)	The information made me consider my energy options	2014	14	26	26	20	13	*
		2013	16	23	24	19	19	-
C)	Other than paying the bill, I took action as a result of reading this information. For example I looked into, or actually switched supplier, tariff or payment method	2014	12	16	19	27	25	*
		2013	12	15	19	22	32	-

Base: All read in detail /glanced over bill/statement of account (969) 2013, (1,006) 2014

OG48. Thinking about the last **price increase notification letter** you received, in how much detail did you look at it?[53]

	March '13 %	March '14 %
Read it in detail	39	35
Glanced over it or skim read it	47	53
Only saw what it was, but did not read it	8	8
Did not read it at all	5	4

Base: All received price notification letter in past year (443)

OG49. Thinking about last **price increase notification letter** you received, to what extent do you agree or disagree with the following statements?[54]

			Strongly agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Strongly disagree	No opinion/ don't know
A)	I understood the information	2014	35	46	11	6	1	*
		2013	37	42	11	8	2	-
B)	The information made me consider my energy options	2014	13	28	19	23	17	-
		2013	15	24	21	21	20	-
C)	I took action as a result of reading this information. For example I looked into, or actually switched supplier, tariff or payment method	2014	8	15	20	29	28	*
		2013	11	14	18	24	33	-

Base: All read in detail /glanced over price notification letter (436) 2013, (388) 2014

[52] New question introduced in 2013
[53] New question introduced in 2013
[54] New question introduced in 2013

OG50. Thinking about the last **end of fixed term letter** you received, in how much detail did you look at it?[55]

	March '13 %	March '14 %
Read it in detail	53	55
Glanced over it or skim read it	37	36
Only saw what it was, but did not read it	7	6
Did not read it at all	3	3

Base: All received end of fixed term letter in past year (286)

OG51. Thinking about last **end of fixed term letter** you received, to what extent do you agree or disagree with the following statements?[56]

			Strongly agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Strongly disagree	No opinion/ don't know
A)	I understood the information	2014	41	49	7	2	1	-
		2013	39	42	13	6	*	-
B)	The information made me consider my energy options	2014	27	32	21	15	5	-
		2013	27	33	20	9	12	-
C)	I took action as a result of reading this information. For example I looked into, or actually switched supplier, tariff or payment method	2014	27	24	21	21	7	-
		2013	27	21	23	14	14	-

Base: All read in detail /glanced over end of fixed term letter (220) 2013, (261) 2014

OG52. Using the words here, please tell me the extent to which you trust or distrust energy suppliers to be **open and transparent in their dealings with customers**?[57]

	March '12 %	March '13 %	March '14 %
Trust completely	6	5	4
Tend to trust	28	25	24
Neither trust nor distrust	26	27	27
Tend to distrust	26	26	29
Distrust completely	13	18	15
Don't know	2	*	*

Base: All with mains electricity or gas and responsible for bills (1,393)

[55] New question introduced in 2013
[56] New question introduced in 2013
[57] New question introduced in 2013

OG53. **Who is your current electricity supplier?[58]**

	March '13	March '14
	%	%
British Gas	27	26
E.ON	19	15
EDF	11	12
Scottish Power	11	12
npower	10	10
Southern Energy	7	5
SSE	3	5
Scottish Hydro	2	1
Swalec	2	2
First Utility	1	2
Ecotricity	1	*
Co-operative Energy	*	1
Ebico	*	*
Good Energy	*	-
Marks & Spencer Energy	*	1
Ovo	*	1
Sainsburys Energy	*	1
Spark Energy	*	*
Utility Warehouse[59]	n/a	*
Other	*	*
Don't know	2	2

Base: All with mains electricity and responsible for bills (1,383)

[58] New question introduced in 2013
[59] New supplier introduced in 2014

OG54. **Who is your current gas supplier?**[60]

	March '13 %	March '14 %
British Gas	35	34
E.ON	16	13
npower	10	9
Scottish Power	10	10
EDF	8	10
Southern Energy	6	5
SSE	3	4
Scottish Hydro	2	1
Swalec	2	2
Co-operative Energy	1	1
Ecotricity	1	*
First Utility	1	2
Marks & Spencer Energy	*	1
Ebico	*	*
Ovo	*	1
Sainsburys Energy	1	1
Spark Energy	*	1
Good Energy	-	*
Utility Warehouse[61]	n/a	*
Other	*	*
Don't know	2	2

Base: All with mains gas and responsible for bills (1,227)

OG55. **Do you have any long term physical or mental impairment which limits your daily activities or the work you can do?**[62]

	March '13 %	March '14 %
Yes	15	13
No	85	87

Base: All with mains electricity or gas and responsible for bills (1,393)

[60] New question introduced in 2013
[61] New supplier introduced in 2014
[62] New question introduced in 2013

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