Electricity & Gas Competition Review

Research Study Conducted for

ofgem

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Contents

Executive Summary

Awareness of competition in both the electricity and gas markets, now that both markets are fully open, is almost universal. It is unlikely that awareness will ever reach the 100% level and so current levels of awareness are probably as high as could be hoped for. Furthermore, among the majority of customers, it is clear competition in the home energy markets is welcomed.

Additionally, customers are becoming increasingly knowledgeable about competition, with around seven in ten in both markets now feeling that they are either fairly or very well informed. However, a minority still feels not very or not at all informed; typically those customers whom we can describe as being disadvantaged* in some way.

Doorstep selling appears to be the most effective and widespread method of communicating with customers. It is the biggest source of information on both electricity and gas competition, especially among those who have switched supplier. Though few, spontaneously, say they have experienced problems with this form of contact, rather more say they have done so when prompted with a list of possible problems. The main issue is a feeling that salesmen are too pushy and have a tendency to call at inconvenient times.

As a whole, the proportion of customers who have switched electricity supplier has doubled since earlier this year. However, as we found in the gas market, certain groups are not switching electricity supplier as frequently as others, but there is evidence that this is changing, as it did in the gas market.

Very few of those customers who have switched gas or electricity supplier have experienced any problems when they did so, and among those who have not switched little difficulty is anticipated. The main barriers to switching either gas or electricity are that customers see no reason to change. At present there is a significant gap between the savings non-switchers think are available and those necessary for them to switch supplier. There also appears to be a lack of knowledge among non-switchers when it comes to price, with non-switchers much less likely than switchers to have received information on prices and other payment terms.

The vast majority seem to have experienced no problems with the switching process for either gas or electricity, and do not feel mis-informed by the information they were given at the time. However, one in ten electricity switchers and two in ten gas switchers feel they were misled during the switching process, mainly due to paying more than they expected.

* See P9 for explanation

Satisfaction with payment methods for both gas and electricity is almost universal, irrespective of the chosen method. Most customers choose their current method because it is convenient for them to pay in the way they do and they feel it is the best way for them to budget. While many customers do not know whether they are paying by the cheapest method or not, there seems to be little evidence to suggest there would be a mass shift in payment method if everyone was aware of the price differentials. Among those who know they are not paying by the cheapest method, convenience and ease of budgeting appear to outweigh potential cost savings.

MORI/ 11750

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Introduction

Background

Between September 1998 and June 1999 competition has been introduced for all domestic electricity customers (some 24 million). Ofgem, the combined electricity and gas industry regulator, has overseen the introduction of competition and the full opening of the electricity market.

MORI was commissioned to conduct two quantitative surveys. The first, carried out in February/March 1999 covered those areas opened up to competition by December 1998, representing just 4 million electricity customers nationally.

This, the second quantitative phase of 1999, presents the findings of a national survey now that all customers can choose who supplies their electricity <u>and</u> gas.

MORI conducted similar research during the various phases of opening of the domestic gas market, on behalf of Ofgas - in October 1996, December 1997 and July 1998. The October 1996 survey was conducted six months after competition had been introduced into the Phase 1 area. The December 1997 survey was conducted eight months after competition had been introduced into the Phase 2b area. A national July 1998 survey was conducted two months after the last areas had been opened up to competition. Further details of these surveys are given in the appendices. Where appropriate, comparisons are made in this report with the Ofgas research.

Survey Objectives

The main objectives of this survey were to assess the effectiveness of the introduction of competition to date, by:

- determining customers' awareness, knowledge and experience of electricity and gas competition
- looking at the reasons for switching/not switching and likelihood of switching in the future
- evaluating the problems experienced with the switching process and/or the suppliers
- examining the issues affecting disadvantaged customers and how competition is impacting upon them

Methodology

2,315 interviews were conducted with domestic electricity and gas consumers. Interviews were conducted with the person wholly or jointly responsible for paying the household's electricity and gas bills and who would make the decision to change supplier, either on their own or in consultation with another household member. The proportion of electricity 'switchers' was boosted to allow for their separate analysis.

To ensure that the results are representative of the GB population, the data have been weighted to the known profile of households by age, social class and working status of head of household, as well as by the Mosaic life code of Enumeration Districts (EDs), and the percentage of electricity and gas switchers understood to be in these areas at the time of fieldwork - that is, 11% for electricity and 25% for gas. Data entry and analysis were carried out by Independent Data Analysis.

All interviews were conducted face-to-face, in-home, between 6th September and 13th October 1999. Fieldwork was carried out by MORI/Field & Tab. Interviewers were provided with a list of addresses within each sampling point (ED). They were instructed to leave at least three doors between each call. Half the interviews conducted by each interviewer were carried out in the evenings or at the weekend.

Interpretation of Data

Where percentages in tables do not sum to 100, this may be due to computer rounding, the exclusion of 'don't know' categories, or multiple answers. Throughout the report, an asterisk (*) denotes any value of less than 0.5% but greater than zero.

Differences in data commented on in the text should be generally assumed to be statistically significant, unless stated otherwise. However, for sub-samples please see the notes in the appendices.

In the text and in some tables and charts "PPM" is an abbreviation for prepayment meter and "PES" for public electricity supplier.

In the report, we refer to people who have difficulty paying bills. These are defined as those who agree to one or more of the following four statements:

- *It's sometimes hard to pay for the electricity we use (18% agree)*
- *With my bills I frequently feel I'm 'robbing Peter to pay Paul' (16% agree)*
- *I am often unable to pay for my electricity within the time required (7% agree)*
- *I currently have an outstanding debt with my electricity supplier which is more than six months old (just 3% agree)*

Publication of Data

Our Standard Terms & Conditions of Contract apply to this, as to all studies that we carry out. No press release or publication of any of the findings should be made without the advance approval of Market & Opinion Research International (MORI). A refusal, however, would only be given if the press release was deemed to be inaccurate or misrepresentative of the data.

Key Findings

Awareness & Knowledge of Competition

Awareness of electricity competition has increased (up six points to 95%) since last measured in February/March this year. It is now on a par with awareness of competition in the gas market where almost all customers are aware they now have a choice of supplier. As it is unlikely that this figure will ever reach 100% (the figure for gas has gone up by one point in the last year – to 96%) we can say that awareness is now virtually universal.

The proportion who feel well informed about competition has also improved, with seven in ten (a 14 point increase for electricity) customers feeling informed about the ability to change supplier in both the gas and electricity markets. Additionally, customers are more than twice as likely to feel that they *'understand broadly how the new electricity/gas market works'* as not (52% vs. 25%).

A clear majority (around three-quarters) are in favour of competition, with less than one in ten (8%) against. Domestic energy consumers are also a little more likely to disagree than agree that *'I don't feel I can get any benefits from competition in the electricity and gas markets'* (39% vs. 33%).

Further highlighting this increased awareness, the majority of electricity and gas consumers are now aware that they do not have to pay someone to help them change supplier (83%); they do not need to have either new electricity cables (80%) or new gas pipes (80%) to their homes; that some suppliers offer additional discounts for dual fuel (64%) and that they do not have to pay by direct debit if they change supplier (65%).

The number of companies consumers can name which are offering electricity and gas supplies has also increased since last measured. One-quarter can now name four or more suppliers for electricity. Awareness of gas suppliers appears less wide-ranging, with only half this proportion (12%) able to name four or more suppliers offering gas.

Contact with Electricity Suppliers

Indicative of the increasing level of sales activity being undertaken by suppliers, the main source of information for electricity and gas competition is now door-to-door salespeople (56%), closely followed by radio and TV advertisements (48%) and leaflets/brochures from the suppliers themselves (46%). The success of door-to-door salespeople is further evidenced by the greater proportion of electricity (64%) and gas (70%) switchers who cite them as their prime source of information on competition.

Despite a positive trend in awareness and knowledge about electricity and gas competition, there remains a minority, generally those we can describe as being disadvantaged in some way, who are less likely to feel informed and less likely to have knowledge about specific aspects of the markets.

However, less than one in six (15%) people have received no contact at all from electricity and gas suppliers. While this represents a marked improvement on February/March figures - when 42% had received no contact – we cannot attribute all of this reduction to electricity suppliers as we have combined gas and electricity approaches this time. However, it is likely that there has been a marked increase in this contact from electricity suppliers (or those offering dual fuel) as competition in this market is relatively newer.

For the majority of those who have had doorstep sales contact, their experience was believed to be an informative one, including 20% who believe it was *very* informative. However, for one-quarter this contact was not thought to be informative, most notably among ABs (34%), single person households (32%) and those unlikely to either change electricity (30%) or gas (31%) supplier.

The vast majority (four in five) say they have not experienced any problems with their contact with energy suppliers. However, a significant minority (14%) have experienced problems with doorstep salespeople. On prompting with potential problems that they might have had, those who have had a visit from a doorstep salesperson say the main problem is that they were either too pushy (30% of those who have had contact with a doorstep salesperson, equating to 19% of all customers) or that they called at an inconvenient time (23%, or 14% of all customers). There is also a proportion who felt that the salesmen tried to trick them into signing a contract (12%, or 7% of all customers) or did not tell them the truth (9%, or 5% of all customers).

Among those who have received a telesales call from a new supplier, there has been a marked increase in the proportion who say the salesperson was 'too pushy' (24%, up twenty-two points since the Spring when we asked about electricity telesales people only). This increase may be related to the fact that the market has now been open to competition for a longer time than was the case in the Spring and thus there have been more opportunities for contact with telesales people. In addition, in the current survey we asked about both gas and electricity suppliers, as while in Spring we asked about electricity suppliers only.

Again there also appears to be an annoyance factor, with 28% complaining that calls were made at an inconvenient time. However, in both of these cases – salesman too pushy or calling at an inconvenient time - this equates to no more than 5% of customers as a whole.

There are still relatively few customers who have had information from more than a couple of suppliers about providing electricity and/or gas (29% from three or more suppliers) or more specifically about prices and payment terms (12% from three or more suppliers). One-third say they have not received any information about price and payment terms.

The proportion who find it easy to compare the price and payment terms available from the different gas and electricity suppliers is higher than was true of the electricity suppliers only in February/March. Nearly half (47%, a 12 point increase) now state that they find it easy. However, there remains one-third of customers who find it difficult to make a comparison.

Among people who do find it difficult to compare prices (19% of all customers), 45% believe that the information is unclear or confusing, while more than one-third say there is a general lack of information. Other problems include the difficulty in comparing like with like (28%) and having nothing to compare these prices to as yet (21%).

Switching Electricity & Gas Supplier

Based on figures provided by Ofgem in September 1999, it is estimated that around 11% of households have now switched electricity supplier, double the proportion who had switched at the time of the Spring survey*. The proportion of switchers is highest among ABs (14%), those on a state pension (14%) and those who pay for their electricity by direct debit/standing order (15%). Again it is also higher among those who have switched gas supplier (18%).

Those who appear least likely to switch are 16-34 year olds (7%), those who rent their property privately (6%), those who live in a flat/maisonette (7%), those without a bank account (8%), those on a low income (7%) and those who pay for their electricity via a prepayment meter (3%).

Therefore, as experienced in the gas market in the early stages of competition, it is the higher income groups who are more likely to switch electricity supplier. However, as outlined below, the reverse is now the case in the gas market, with lower income groups now more likely to switch gas supplier than higher income groups. As awareness and knowledge increases it seems likely that this trend will follow in the electricity market.

Based on figures again provided by Ofgem, it is estimated that around 25% of households have switched gas supplier. As stated above, there are some contrasting differences in the types of people who have switched gas when compared to electricity. Typically it is the less 'well-off' who are most likely to have switched gas supplier - DEs (28%), those who are not working (29%), those who rent from a local housing authority (32%), those in receipt of benefits (30%) and pensioners (32%).

* February/March 1999 electricity switchers figures were based upon those who had registered to switch electricity supplier. The reason for this was that, at the time, competition was very new and therefore very few had actually gone through the process.

The exception to this is PPM payers who are less likely to have switched gas supplier (14%). Switching gas supplier is also lower among ABs (20%), those who rent privately (13%), those who live in a detached house (21%) and those on a state pension (21%).

As previous studies have shown, price is by far the overriding reason for switching both gas and electricity. It would also be the most important factor among non-switchers if they were to consider changing supplier. Other factors are far less likely to be mentioned, eg the attraction of dual fuel (23% of electricity switchers, 19% of gas switchers). Persuasive salesmen have also been an important influence for more than one in ten (11% electricity, 14% gas).

Less than one in ten mentions the ability to have better service as their reason for switching either their gas or electricity supplier. However, non-switchers are more likely to cite the quality of service as a factor they would take into account when switching (33% electricity, 35% gas), although this is still less important than price (75% for both services). Additionally, for electricity customers, one in five would want the company to be reliable and trustworthy, while one in ten mention the choice of payment, ease of switching and being a well known company as important factors. Findings are similar for gas but for one in ten a price guarantee is also important. This may be a reaction to the price promise currently being offered by BGT.

Overall, the switching process for both electricity and gas switchers has not caused any major difficulties, with the vast majority saying the process is an easy one. Only 6% of electricity switchers and 8% of gas switchers have found it difficult to switch. While the base is too small to be statistically reliable, it does appear that the main problems concern poor communication or, in the case of gas switchers, problems with billing.

However, a minority of switchers feel they were misled by the information provided - 11% of electricity switchers, 18% of gas switchers. Those who felt misled complained of paying more than they were expecting to when they decided to change supplier or that they thought they were signing for information only (though this amounts to less than 5% of switchers overall).

The main reason for not switching either gas or electricity supplier is that customers see no reason to change. Nearly nine in ten electricity non-switchers and three-quarters of gas non-switchers are satisfied with their current supplier. Furthermore, a third of both electricity and gas non-switchers believe they can get a lower price by switching and among those who do think they can get a lower price, the average perceived reduction is not sufficient for many to switch.

Very few non-switchers expect to change their supplier in the next year, with only 7% (down 4 points since February/March 1999) of electricity and 8% (down 2 points since July/August 1998) of gas non-switchers saying that they are likely to switch in the next twelve months. Noticeably, a greater proportion of those who have switched either electricity or gas already (12% electricity, 10% gas) say they are likely to switch again in the next twelve months.

Method of Payment

For some of the less well-off (DEs, those in local authority accommodation, those who live in a flat/maisonette, those without a bank account, those on a low income and the disabled) a prepayment meter is the most used payment method.

As with past research in this area, the vast majority are satisfied, regardless of payment method, with the way they pay for their electricity or gas. Additionally, when asked how they would 'ideally' like to pay for their electricity few give a different method to their current one.

The reason why domestic energy consumers pay in the way they do is largely based upon lifestyle factors as opposed to any cost differentials. For both electricity and gas customers, regardless of payment method, ease and convenience and budgeting factors are more likely to be mentioned than price.

While many do not know whether they are paying by the cheapest method or not, the findings do illustrate that even if they were aware of the differentials there would not be a large shift in payment method. Among those aware that they are not paying by the cheapest method, ease, convenience and budgeting factors again outweigh potential savings.

Disadvantaged Customers

For the purposes of this research, a number of categories have been identified as indicating 'disadvantaged' customers and the results analysed by those different categories:

- Low income customers, with a household income of less than £5,000 pa

- Those in social classes D and E, particularly the latter

- Benefit recipients (eg income support, unemployment benefit, housing benefit and so on)

- The elderly and, particularly, those who receive a state pension only rather than an additional occupational pension

- Those without a bank or building society account

- Single parent families

- Customers who pay for their electricity or gas by prepayment meter

- Those who have had difficulty paying their bills at some time (see introduction for definition)

These groups form between 7% (those with an income less than £5,000 per annum) and 29% (those in social class DE) of home energy customers.

Generally speaking, these 'disadvantaged' customers tend to be less knowledgeable about electricity competition and are, consequently, marginally less likely to have switched electricity or be likely to in the future. However, since measured at the start of the year, this group is becoming increasingly knowledgeable and, in the case of low income customers (those who have a household income of less than £5,000 per annum), is now three times as likely to have switched electricity supplier as in the Spring. As we have seen in previous studies and also re-iterated here, while disadvantaged groups were less likely to switch at the start of competition low income groups, C2DEs and benefit recipients are now more likely than 'well-off' groups to have switched gas supplier. PPM payers continue to lag behind in this respect, however.

There does not appear to be any evidence of new suppliers avoiding lower income customers or trying to discourage them from switching. These groups do, however, act more cautiously towards new suppliers. It seems that new suppliers may be targeting C2DEs with doorstep sales, perhaps due to the fact that they are likely to get a better response from a face-to-face approach to these groups - 71% of C2DEs have been visited by a doorstep salesperson compared to 47% of ABs.

There is a high level of satisfaction with all payment methods.

The proportion of PPM customers who are aware that they are not paying by the cheapest method is 43% for electricity and 42% for gas. Findings indicate that even if all PPM customers were made aware of the differentials, the majority would not choose to change their payment method. If they were given the option of returning to a credit meter at no charge, just 11% for electricity and 16% for gas would choose to do so. If this meant a reduction in price these figures would rise to 28% and 27% respectively.

Again the reasons for preferring PPM as a payment method over cheaper methods are ease and convenience (64% for electricity, 64% for gas) or because it is the best way of budgeting (39% for electricity, 44% for gas).

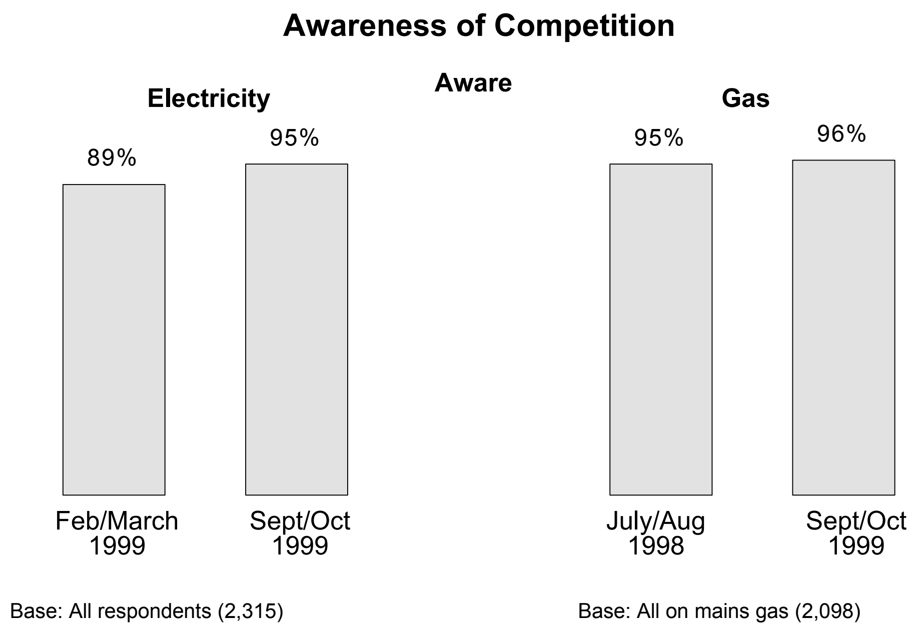
More than one-quarter of electricity PPM customers have run out of electricity in the past 12 months. However the majority (two-thirds) have not and a further 8% cannot recall whether they have or not (implying that if they did it was not a major problem). Among the few who have run out, the main reason for electricity consumers was that they did not notice at the time (38%). A further one-third say it was because they did not have enough money at the time. A far greater proportion have used emergency credit on the meter (71% for electricity), and for many this is quite a regular occurrence (one in five have used it twenty times or more).

Gas PPM customers are as likely to have run out in the past year as electricity PPM customers. However, they are less likely to use emergency credit (half have never used it in the last year). For those who have run out of gas the main reason is that the nearest recharging facilities were either closed, too far away or inconvenient (29%), though around one in five also say they did not have enough money at the time or their meter was faulty.

Awareness of Electricity & Gas Competition

Awareness of electricity competition has continued to rise with more than nine in ten (95%) now aware that they can buy their electricity from companies other than their local Public Electricity Supplier. Only one person in twenty is not aware of competition.

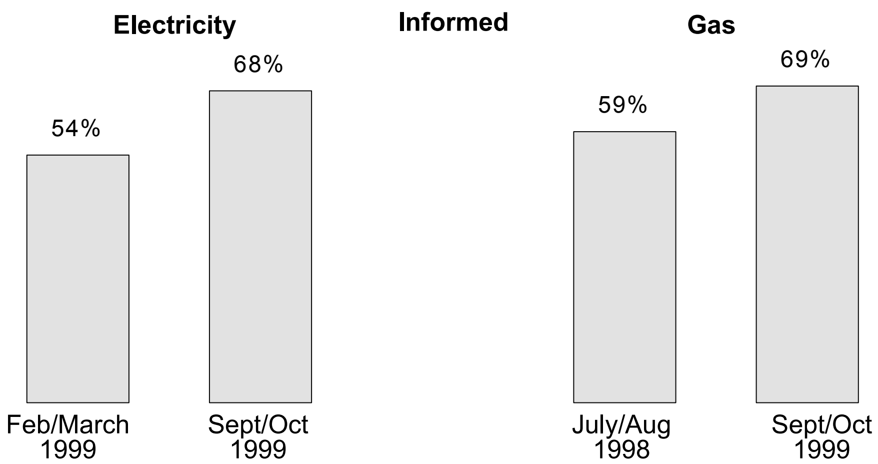
There has been no significant change in the proportion of customers who are aware of competition in the gas market since last measured in Summer 1998. Ninety-six per cent (a one point rise) are now aware that they can get their gas from a supplier other than British/Scottish Gas. Only one in twenty-five (4%) are unaware.



How Informed do Customers Feel?

The majority feel knowledgeable about electricity competition and increasingly so: 68% (a 14 point rise) now feel either 'very well informed' or 'fairly well informed'. As in March 1999, though, there remains a significant number of people – around three in ten – who do not feel informed about competition in the electricity or gas market. Figures are virtually identical when comparing how knowledgeable consumers feel about competition in the gas market, with seven in ten feeling either very well or fairly well informed, a 10 point increase on July/August 1998 figures.

How Informed Do Customers Feel?



Base: All respondents (2,315)

Base: All on mains gas (2,098)

While the vast majority of consumers are aware of competition in the electricity and gas markets, there remain certain groups who are both less likely to be aware of electricity and gas competition and less likely to feel informed.

As found in previous studies, it is the less 'well off' or 'disadvantaged' who are less likely to be aware/feel uninformed about competition. This includes those in social class E, low income groups (with a household income of less than £5,000 pa), those who do not have a bank account, and single parent families. In addition, those who live in a flat/maisonette are also less likely to be aware of competition or feel informed about it.

Identification of Least Well Informed Groups

	Not aware (electricity)	Not very well/at all informed (electricity)	Not aware (gas)	Not very well/at all informed (gas)
	%	%	%	%
All	5 (10)*	30 (46)	4 (4)+	29 (39)
Sex				
Male	4 (7)	26 (39)	3 (-)	25 (-)
Female	5 (12)	33 (50)	5 (-)	32 (-)
Social class				
AB	2 (9)	30 (45)	3 (3)	30 (33)
C1	3 (4)	27 (44)	3 (3)	26 (38)
C2	5 (8)	28 (43)	4 (3)	27 (41)
DE	8 (16)	34 (50)	5 (6)	33 (42)
E	10 (21)	38 (54)	7 (-)	37 (-)
Low income	14 (28)	37 (57)	8 (-)	39 (-)
Bank account				
Yes	4 (8)	28 (43)	3 (4)	27 (38)
No	14 (20)	46 (61)	10 (8)	45 (51)
Single parent family	13 (18)	35 (54)	10 (-)	36 (-)
Type of housing				
Detached	1 (8)	29 (45)	2 (-)	28 (-)
Semi-detached	4(6)	29 (43)	4 (-)	28 (-)
Terraced	5 (8)	28 (41)	3 (-)	27 (-)
Flat/maisonette	12 (19)	37 (54)	8 (-)	36 (-)

* February/March ’99 figures are in brackets
+ July/August ‘98 figures are in brackets
Base: All (electricity), all on mains gas (gas)

Source: MORI

Further emphasising the higher levels of perceived knowledge about competition within the electricity and gas markets is the fact that as a whole home energy consumers are more than twice as likely to agree than disagree that they *'understand broadly how the electricity/gas markets works'* (52% vs. 25%). However, as only half feel they understand, there is still much scope for educating consumers further on the implications of competition.

The same groups that feel uninformed – social class Es, one parent families, those who live in a flat or maisonette, those without a bank account, and those on a low income - are less likely to agree. However, no group of people is more likely to disagree than agree, although those on a low income (less than £5k pa) are equally as likely to agree as disagree.

'I feel I understand broadly how the new electricity/gas market works'

	(Base)	**Agree**		**Disagree**	
		*Feb/March '99**	*Sept/Oct '99*	*Feb/March '99**	*Sept/Oct '99*
		%	%	%	%
All	*(2,315)*	47	52	40	25
Sex					
Male	*(1,021)*	60	59	27	20
Female	*(1,287)*	39	47	49	29
Social class					
AB	*(416)*	54	59	39	21
C1	*(646)*	51	57	40	21
C2	*(463)*	46	51	37	28
DE	*(790)*	41	44	43	28
E	*(399)*	38	39	44	32
Electricity switchers	*(667)*	*71*	63	20	22
Gas switchers	*(684)*	n/a	58	n/a	21
Low income	*(166)*	*30*	36	50	36
Difficulty paying	*(588)*	*39*	42	46	30
Benefit recipient	*(535)*	*43*	39	46	31
One parent family	*(151)*	*35*	32	47	31

* This figure was asked for the electricity market only in February/March '99

Base: All

Source: MORI

Awareness of Aspects of Competition

In order to examine further the public's awareness and understanding of competition within the electricity and gas markets, customers were asked whether a series of seven statements relating to competition in the electricity and gas markets were either true or false.

Around four in five give the correct answer for three of the seven statements:

> *I would need to pay someone to help me change electricity/gas supplier (False)*
>
> *If I changed gas supplier I would need to have new gas pipes installed (False)*
>
> *Customers need to have new electricity cables to their homes if they want to change electricity supplier (False)*

Additionally, a clear majority (around two-thirds) are aware that customers do not need to pay their electricity/gas bill by direct debit if they switch and that some suppliers offer additional discounts for those who buy both their gas and electricity from them (the latter, though, represents a fall in awareness since earlier in the year when 73% thought that this was the case).

Under half are aware that those in debt with their current electricity/gas supplier may not be able to change or believe that some companies allow you to choose the amount you wish to pay per month on a direct debit scheme.

Responses to the statements do illustrate that, while the majority are aware of the specific aspects of competition, there is a significant proportion of consumers who are not very well informed as to the process and impact of changing electricity or gas supplier.

While two-thirds (65%) are aware that they do not have to pay their bills by direct debit if they change electricity or gas supplier, awareness is noticeably lower among those aged 65+ (51%), those in social class E (53%), single person households (57%), those without a bank account (47%) and those with a state pension (40%).

It does not appear that consumers who do not know the correct answers are actually misinformed. Those people who do not give the correct answer are more likely to state that they do not know the answer than give an incorrect response.

Those who have already switched either gas or electricity supplier display a greater knowledge of these aspects of competition, particularly those relating to the actual process of switching.

Knowledge of Facts About the Electricity & Gas Markets

	% Giving Correct answer		
	All	**Electricity Switchers**	**Gas Switchers**
Base: All	*(2,315)* %	*(667)* %	*(684)* %
I would need to pay someone to help me change electricity/gas supplier	83 (78)	93 (96)	90 (89)
If I changed gas supplier I would need to have new gas pipes installed	80 (n/a)	90 (n/a)	85 (n/a)
Customers need to have new electricity cables to their homes if they want to change electricity supplier	80 (77)	91 (97)	85 (92)
Customers need to pay their electricity/gas bill by direct debit if they want to change electricity/gas supplier	65 (60)	76 (79)	75 (74)
Some suppliers offer additional discounts for those who buy both their gas and electricity from them	64 (73)	61 (82)	62 (86)
Those in debt with their current electricity/gas supplier may not be able to change to a new supplier	49 (50)*	49 (48)	47 (44)
Some companies allow you to choose the amount you wish to pay per month on a direct debit scheme	46 (48)	51 (46)	48 (53)

* February/March 1999 figures are in brackets (electricity only)

Source: MORI

Attitudes towards Competition

Reiterating findings in previous studies for Ofgas and Offer, electricity and gas customers are generally in favour of competition, feel they can benefit from its introduction and do not feel service will suffer as a result of price falls.

Around three-quarters (71%, a five point fall) believe that 'it's better to have a choice of supplier than to be tied to one company'. However, there remains a minority (8%, a three point fall) who are against the idea of competition and noticeably, as earlier in the year, this includes a small proportion of electricity (5%) and gas (5%) switchers.

Those most likely to disagree with the idea of competition in the home energy market are those people who are likely to have the lowest income. More than one in ten of over 65s (12%), DEs (12%), those who are not working (11%), those with high gas bills (11%), those without a bank account (12%) and those on a low income (12%) are against competition.

	% Agree	
	Feb/March '99	**Sept/Oct '99**
Base: All	*(1,212)**	*(2,315)*
It's better to have a choice of supplier than to be tied to one company	76	71
I feel I understand broadly how the new electricity/gas markets work	47	52
I don't trust many of the new electricity/gas companies	34	39
I don't feel I can get any benefits from competition in the electricity/gas market	33	33
If electricity/gas prices fall the standard of service will suffer	22	20

* This figure was asked for the electricity market only in February/March '99

Source: MORI

While the large majority are in favour of competition, there is a minority of consumers (20%) who feel that competition will result in a fall in the standards of service offered. This is most evident among those without a bank account (27%), the disabled (28%) and those who are certain not to change electricity (28%) or gas (28%) suppliers. Some of those groups most worried about the impact on service standards in the February/March 1999 study – one parent families and those on a low income - are now no more likely than average to be concerned about the standards of service. However, as we will see later, a poor standard of service from previous suppliers is not a major motivator in the switching decision.

Two in five respondents (39%, a five point rise) say that they don't trust many of the new electricity/gas companies. This figure is marginally higher among the disadvantaged, perhaps a reflection of their lower levels of knowledge about electricity and gas competition and general cautiousness about competition.

Groups Most Likely to Perceive no Benefit from Competition

	(Base)	**Agree – I don't feel I can get any benefits from competition in the electricity/gas markets**	
		Feb/March '99*	Sept/Oct '99
		%	%
All	(2,315)	33	33
Low income	(166)	50	43
Aged 65+	(535)	41	40
State pension only	(260)	48	47
Other benefits	(535)	41	37
AB	(416)	27	30
C1	(646)	22	29
C2	(463)	33	30
DE	(790)	45	41
Working	(1,340)	26	28
Not working	(975)	41	39
Single person household	(417)	44	44
No bank account	(200)	46	47

** Electricity market only in Feb/March 99*
Base: All

Source: MORI

As at the start of the year, there remains a large proportion (one-third) who feel they can obtain no benefits from competition in the electricity and gas markets. This figure is higher among the elderly and disadvantaged – social class DE, those without a bank account and those on a low income. In addition, regular cash scheme and budget card plan customers are more likely to feel they can obtain no benefits.

Contact with Electricity & Gas Suppliers

Sources of Information

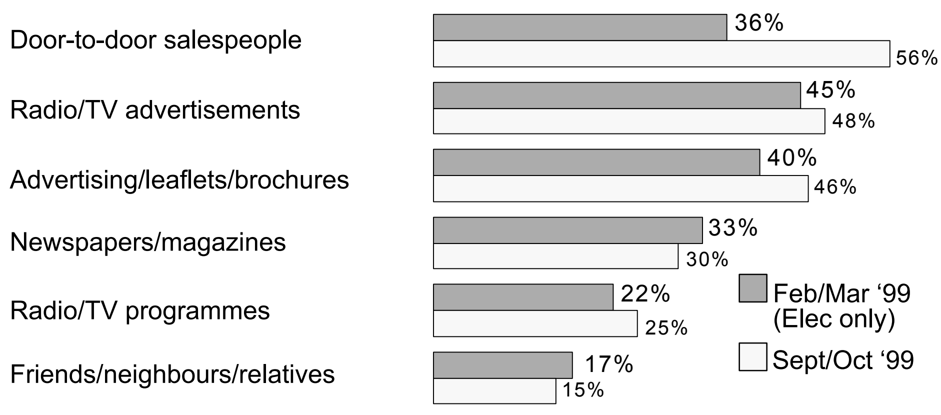
Door-to-door sales is now the most popular information source, with almost three in five (56%, a 20 point increase over the figure in Feb/March 99, relating to electricity competition only) of those who are aware of competition in the electricity and gas markets claiming that they were informed in this way. Awareness through other sources has changed little since the start of the year – approaching half (48%, a three point increase) were made aware through radio or TV advertisement, and marginally fewer (46%, a six point increase) by advertising/promotional leaflets/brochures and newspapers/magazines (30%, a three point fall).

As in past studies regarding competition in both the home energy markets, door-to-door sales appears to be a more frequent source of information among the disadvantaged - DEs, one parent families and those who are not working. It is also more likely to be a source among those in urban than rural areas (59% vs. 46%).

As in March, only 3% specifically recall being informed about competition by the regulator – OFFER/Ofgas/Ofgem.

Sources of Information

Q *Here is a list of different ways in which you may have found out about competition in the domestic electricity and/or gas markets. Please could you tell me which ones apply to you?*



Base: All aware of competition (2,247)

Doorstep salespeople are an even greater source of information to those who have switched electricity (64%) or gas supplier (70%). As in previous studies this suggests that doorstep sales are a very effective means of gaining new customers and as a general source of information about competition. Many customers may be aware of competition but they are more likely to consider switching when presented with details face-to-face.

All other sources of information are marginally more likely to be mentioned by those who have **not** switched, suggesting that these mediums are not as effective at attracting new customers.

Sources of Information – Switchers vs. Non-switchers

	Electricity Non-switchers %	Electricity Switchers %	Gas Non-Switchers %	Gas Switchers %
Base: All aware of competition	*(1,585)*	*(662)*	*(1,372)*	*(679)*
Door-to-door salespeople	55 (34)*	64 (64)	51 (43)*	70 (48)
Radio/TV advertisements	48 (46)	41 (35)	49 (48)	43 (42)
Advertising/ promotional leaflets/ brochures	46 (39)	42 (44)	48 (48)	40 (33)
Newspapers/ magazines	31 (33)	24 (23)	32 (34)	24 (29)
Radio/TV programmes	26 (23)	20 (14)	26 (21)	24 (16)
Friends/neighbours/ relatives	15 (17)	13 (17)	15 (17)	15 (19)
Posters	10 (8)	7 (3)	10 (9)	9 (9)
Exhibition stands	12 (7)	17 (16)	13 (8)	11 (12)

* February/March 1999 figures are in brackets (electricity sources of information only)

Source: MORI

Familiarity with Electricity & Gas Suppliers

More than half of the population are not able to name more than one or two companies which sell electricity in their area; one-quarter can name only one supplier, three in ten two suppliers. However, figures do seem to be heading in a positive direction, with nearly one-quarter (23%) now able to name four or more suppliers (a 9 point increase on spring this year).

Electricity switchers are able to name more suppliers, with three in ten able to name four or more suppliers. However, two in five electricity switchers can name only one or two suppliers, indicating that their choice of supplier when switching was limited to only a couple of companies.

Those customers who are least well informed and knowledgeable are also the group least likely to be able to name four or more suppliers.

Customers are less able to name more than one or two gas suppliers than they are electricity suppliers; just 26% name more than two. Again though, gas switchers are more likely to name a larger number of gas suppliers, but even so only 35% can name more than two.

Q Which of these companies are you aware of selling electricity in this area?

Q Which of these companies are you aware of selling gas in this area?

	Electricity	**Gas**
	%	%
Base: All/All on mains gas	*(2,315)*	*(2,098)*
British Gas/Scottish Gas	43	86
Eastern Electricity/Natural Gas/Energy	21	14
Norweb/Energi	19	9
PowerGen/EME/Sterling Gas	17	7
ScottishPower	16	7
Southern Electric (Scottish & Southern)/Hydro/ Hydro Gas	15	8
Manweb	14	4
London Electricity	12	4
SEEBOARD/Beacon Gas	12	9
Yorkshire Electricity	12	5
Northern Electric & Gas	11	8
SWALEC	9	5
South Western Electricity (SWEB)	8	1
Midlands Gas/National Power	8	9
Calortex	5	8
Scottish Hydro-Electric (Scottish & Southern)	5	3

Source: MORI

Number of Suppliers Customers are Able to Name

	All Electricity	Switchers Electricity	Non-switchers Electricity	All Gas	Switchers Gas	Non-switchers Gas
Base: All	*(2,315)* %	*(667)* %	*(1,648)* %	*(2,098)* %	*(684)* %	*(1,414)* %
1 supplier only	25 (27)*	11 (3)	27 (28)	38	17	45
2 suppliers only	29 (34)	32 (38)	29 (34)	34	46	30
3 suppliers only	19 (22)	24 (31)	18 (22)	13	19	11
4+ suppliers	23 (14)	31 (28)	22 (13)	11	16	9

*Feb/March '99 figures given in brackets

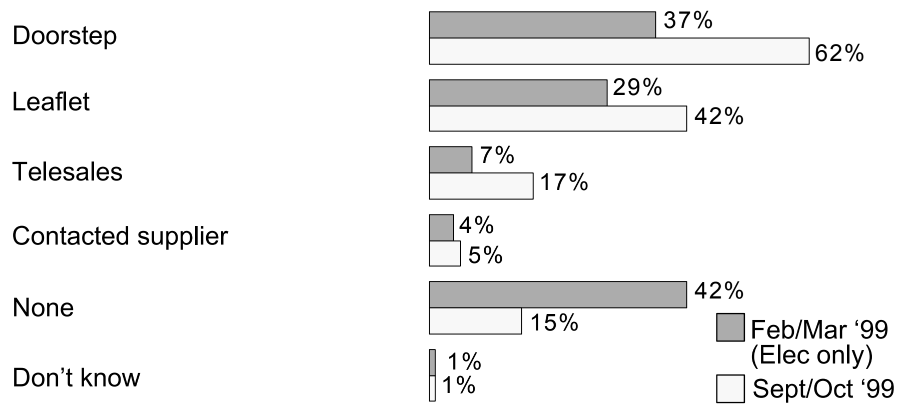
Source: MORI

Contact with Electricity & Gas Suppliers

The proportion saying they have had no contact from electricity/gas suppliers is now only 15%. In the February/March study, which looked at contact with electricity suppliers only, this figure was 42%. It is likely that the majority of this increased contact stems from suppliers seeking new electricity customers as competition in this market is relatively new and so sales activity is likely to have been focused here.

Contact with Suppliers

Q *In which of these ways, if any, have you had contact with the new electricity/gas suppliers in this area?*



Base: All respondents (2,315)

Overall, approaching two-thirds have now had contact with doorstep salespeople, two in five have had a leaflet through the door and one in six has had a telephone call from a supplier.

Noticeably, the disadvantaged are the group most likely to have received a visit from a doorstep salesperson.

Contact with new electricity/gas suppliers

	Base	Doorstep %	Leaflet %	Telesales %	Contacted supplier %
All	(2,315)	62	42	17	5
Low income	(166)	60	31	13	3
Aged 65+	(535)	69	38	17	4
State pension only	(260)	74	36	10	3
Other benefits	(535)	71	32	16	3
AB	(416)	47	52	18	9
C1	(646)	56	49	17	6
C2	(463)	70	38	22	3
DE	(790)	72	32	13	3
Working	(1,340)	58	44	17	7
Not-working	(975)	66	39	18	4
Single parents	(151)	71	34	9	2
Single person household	(417)	56	38	14	3
No bank account	(200)	70	23	9	3

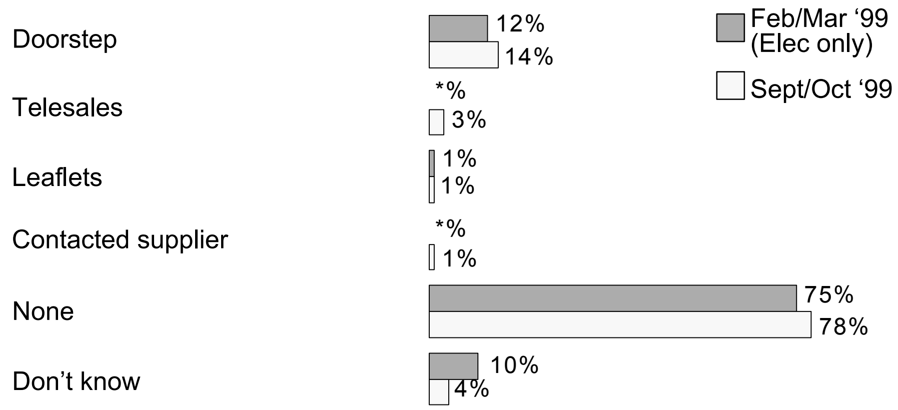
Source: MORI

For the majority (four in five customers) doorstep contact has been problem free. However, there is a minority of 14% who have had problems.

On prompting with a list of possible problems, more say they have experienced at least one of these (three in five). Of those who have been contacted on the doorstep, the main problems were that the salesman was too pushy in their sales tactics (30% of those who have had contact with a doorstep salesperson, equating to 19% of all customers) or called at an inconvenient time (23%, or 14% of all customers). Of particular concern is that 12% of those who have been visited by a doorstep salesperson (or 7% of all customers) say that the representative tried to trick them into signing a contract; one in ten (5% of all customers) believe that the salesmen did not tell them the truth.

Problems with Salespeople

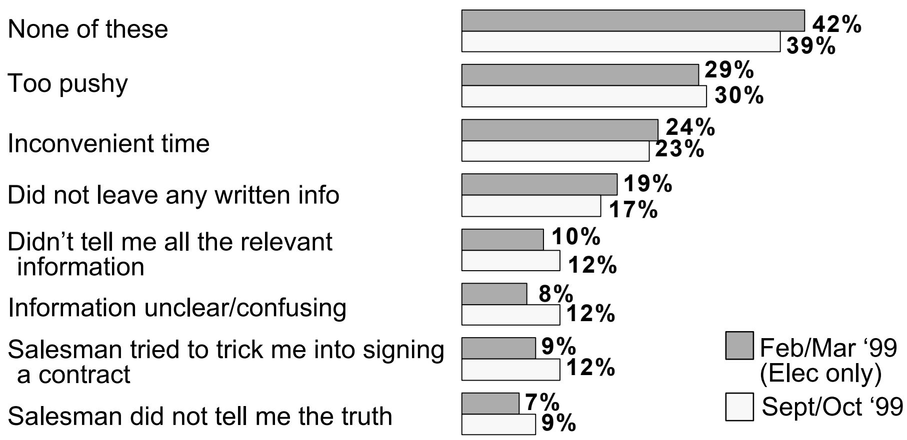
Q With which, if any, of these have you had any problems?



Base: All who have had contact (1,980)

Problems with Doorstep Salespeople

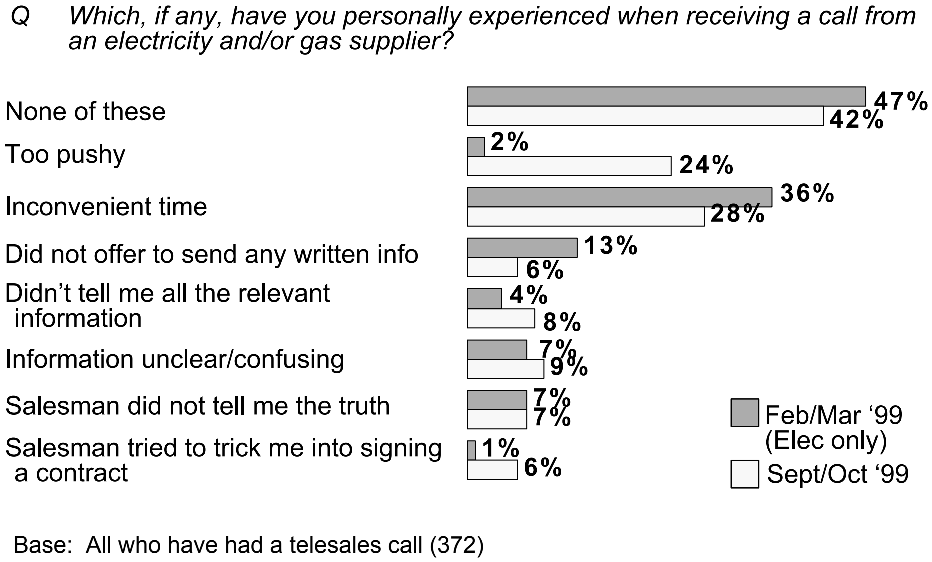
Q Which, if any, have you personally experienced when visited by doorstep electricity and/or gas salespeople?



Base: All who have been visited by doorstep salesperson (1,525)

Again the main problem with telesales calls is that salespeople are contacting consumers at an inconvenient time. However, the proportion who feel electricity/gas telesales callers have been 'too pushy' in their sales stance (24%), is rather higher than the 2% who believed this was true of electricity telesales people in March 1999. This increase may be related to the fact that the market has now been open to competition for a longer time than was the case in the Spring and thus there have been more opportunities for contact with telesales people. In addition, in the current survey we asked about both gas and electricity suppliers, as while in Spring we asked about electricity suppliers only.

Problems with Telesalespeople



Rating of Contact with Doorstep Salespeople

A clear majority now rate the contact they had with electricity and gas doorstep salespeople as informative (61%). One-quarter feel it was uninformative.

Interestingly, ABs are least likely to rate doorstep contact highly (49%).

Both gas and electricity switchers are more likely than average to rate their contact as informative. Although both are higher than average, electricity switchers are noticeably more likely than gas switchers to rate contact as informative (77% vs 69%).

	Doorstep Sales		
	Gas - Jul/Aug 1998	**Electricity – Feb/March 1999**	**Electricity & Gas Sept/Oct**
Base: All who have had contact	(1,608)	(605)	(1,525)
	%	%	%
Very informative	15	18	20
Fairly informative	42	42	41
Not very informative	23	25	18
Not at all informative	9	8	8
Don't know	12	8	13

Source: MORI

Information from Suppliers

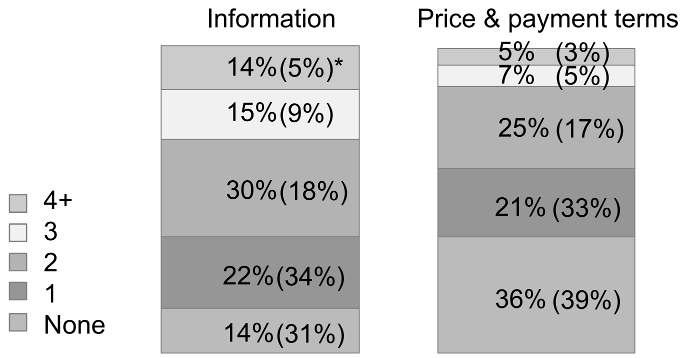
Although the February/March figures looked just at electricity suppliers, it does appear that there has been an increase in the amount of contact that customers have had with suppliers. In February/March, 31% said they had received no information from any of the electricity suppliers, including their own. In the current survey, just 14% say they have received no information from any of the electricity **or gas** suppliers. Nonetheless, one-third (36%) continue to say they have no price and payment information from any of the energy companies.

Less than one-third have had information from or discussions with three or more companies about supplying their electricity or gas. This figure drops to 12% in the case of those who have had price and payment terms from three or more suppliers.

In August 1998 we asked about the number of gas companies that had given customers information about their prices and/or other payment terms. In this case 75% had received information from one or more gas suppliers, including their own (compared to 58% who have received such information from one or more gas **or electricity** suppliers in the current survey). Only marginally more, in 1998, had had information from three or more suppliers (just 15%, compared to 12% in the current survey).

Information from Suppliers

Q Approximately how many electricity and/or gas suppliers have you had information from, or discussions with, about supplying your electricity and/or gas, including your present suppliers?
Q……..about their prices and other payment terms?



Base: All respondents (2,315)   * Feb/March '99 figures are in brackets (Elec only)

Electricity **and** gas switchers are more likely to say they have received both general information and details of price and payment terms from suppliers. Again, though, they have mainly received information from just one or two companies. This suggests that many switchers decided upon a supplier from just one or two other potential energy companies.

	General Information			
	Electricity Switchers	Electricity Non-switchers	Gas Switchers	Gas Non-switchers
Base: All	*(667)* %	*(1,648)* %	*(684)* %	*(1,414)* %
None	1	15	3	17
1	33	20	25	20
2	34	30	33	30
3	17	15	17	15
4+	14	14	18	12

Source: MORI

	Information on Prices and Payment Terms			
	Electricity Switchers	Electricity Non-switchers	Gas Switchers	Gas Non-switchers
Base: All	*(667)* %	*(1,648)* %	*(684)* %	*(1,414)* %
None	12	39	17	42
1	39	19	30	18
2	32	24	29	24
3	7	7	9	6
4+	6	5	8	4

Source: MORI

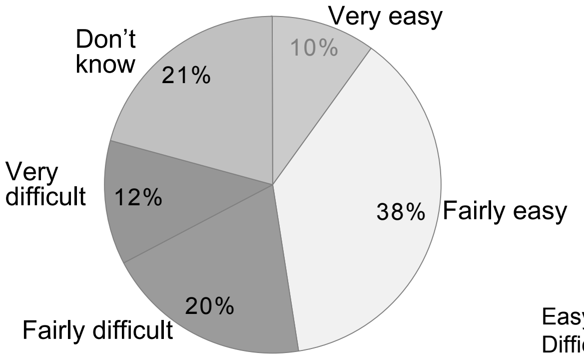
Comparison of Perceptions of New Supplier Prices

While those consumers who have information on price and payment terms are generally finding it easier to compare cost differentials, there still remains one-third who say they find it difficult to make a comparison.

Noticeably, it is those people who we may describe as being well-off who find it most difficult to compare prices – ABs (47%) and those in detached housing (39%).

Ease of Comparing Prices

Q How easy or difficult have you found it to compare the different prices available from the various electricity & gas suppliers?



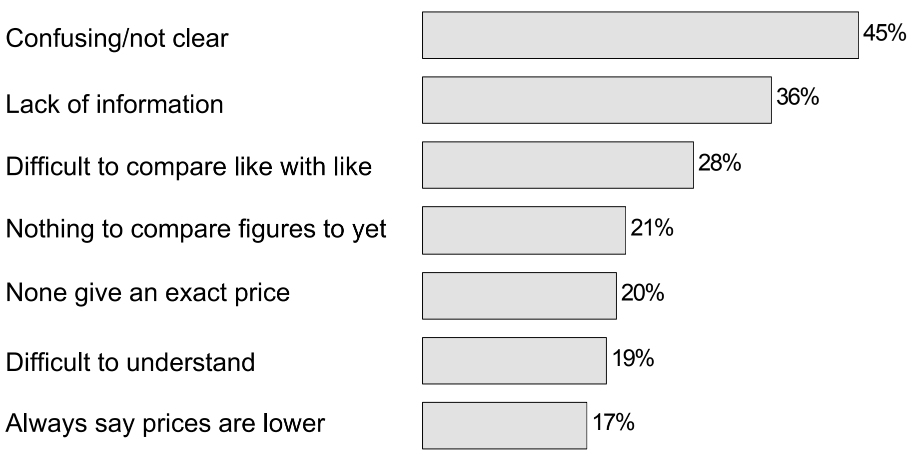
	August 98 (Gas only)	Feb/ Mar 99 (Elec only)	Sep/ Oct 99
	%	%	%
Easy	30	35	47
Difficult	27	31	32
Don't know	43	34	21

Base: All received information on prices (1,464)

Among those who have experienced difficulty in comparing price and payment terms, the main problem is that information is either unclear or confusing. A general lack of information is also a problem. This is further evident in the one in five who say they have nothing to compare price and payment terms with. One in six display cynicism and state that companies always say that their prices are lower.

Ease of Comparing Prices - Reasons

Q Why do you say that it was difficult?

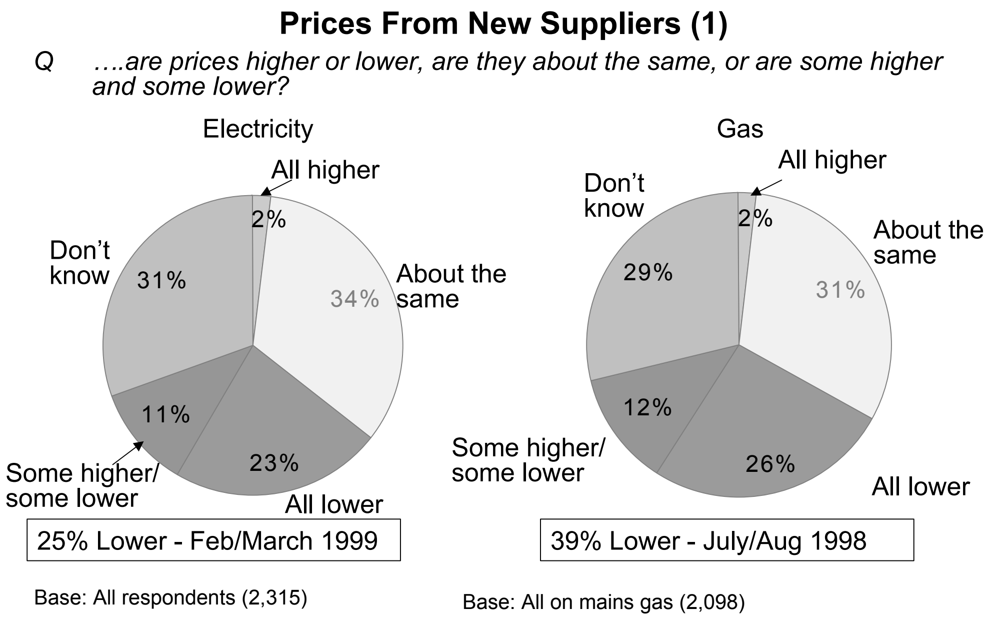


Base: All find it difficult to compare(416)

Again a noticeable proportion (around three in ten) do not know whether prices offered by their local electricity and gas suppliers are lower or higher than their local PES or British Gas Trading. Around a quarter think gas or electricity prices are lower from all of the new suppliers, with around one in ten thinking some are lower. In previous studies respondents were not given the option to say 'some higher/some lower'.

Contrasting with earlier findings, there is now little difference in the proportion who think you can get lower prices by switching gas supplier than switching electricity supplier.

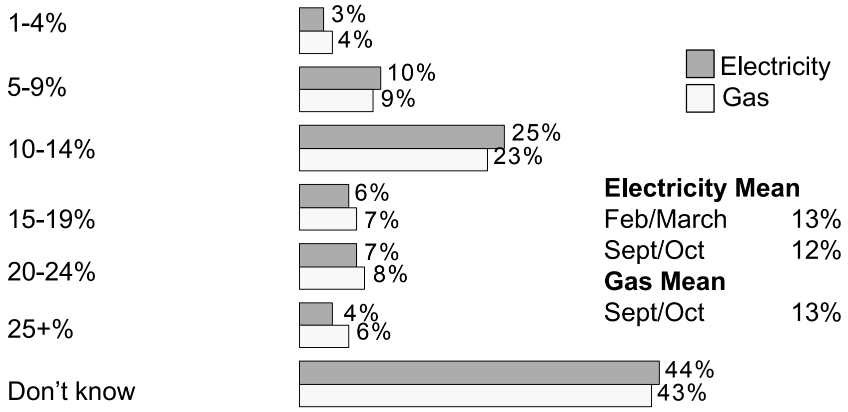
Perhaps reflecting their own experiences, switchers are more likely to state that prices are lower than non-switchers (50% electricity switchers, 40% gas switchers).



On average, customers who think prices will be lower expect a price reduction of around 12% - 13%, and this is little changed since March 99.

Expected Reduction in Price from Switching Supplier

Q *Approx. what percentage reduction in your electricity/gas bill do you think you could get by switching?*



Base: All think prices are lower from new supplier

Switching Electricity Supplier

Who Has Switched Electricity Supplier so Far?

The proportion of switchers (those who have changed electricity supplier) to date in October 1999 was estimated in consultation with Ofgem at 11%. This proportion as in February/March 1999, was used to weight the data by electricity switchers vs non-switchers.

Around one in seven or more of those aged 35+, ABs, pensioners, those who live in detached housing, those who own their own home and those who pay by direct debit or standing order have switched electricity supplier since its introduction.

Those least likely to have switched electricity supplier so far are those aged 16-34, those who live in a flat/maisonette, those who pay by PPM or budget card/plan, those on a low income (less than £5,000 pa) and those who live in private rented accommodation.

As predicted in February/March the lower income groups (who were less likely to switch at the start of the year) are catching up with higher income groups. However, certain groups do lag behind higher income groups in terms of switching. Indeed, the percentage of PPM customers who have switched remains at just 3%.

Proportion of Electricity Switchers by Sub-group

	% Switchers			% Switchers	
	Feb/ March '99	**Sept/ Oct '99**		**Feb/ March '99**	**Sept/ Oct '99**
Base: All	*(1,212)*	*(2,315)*		*(1,212)*	*(2,315)*
	%	%		%	%
Total	5	11	**Electricity bill**		
Age			High	5	12
16-34	4	7	Medium	5	11
35-64	7	13	Low	5	9
65+	4	13	**Bank account**		
Social class			Yes	5	11
AB	9	14	No	2	8
C1	5	11	**Electricity payment method**		
C2	3	9	DD/SO	10	15
DE	4	10	Cash/cheque	3	11
E	4	10	PPM	1	3
Working status			Budget card/plan	3	6
Working	5	11	**Low income**	2	7
Not working	5	10			

* In the February/March '99 study the switchers figure was based on those who had switched and also registered to switch.

Proportion of Electricity Switchers by Sub-group (Cont.)

	% Switchers			%Switchers	
	Feb/ March '99	**Sept/ Oct '99**		**Feb/ March '99**	**Sept/ Oct '99**
Base:	*(1,212)*	*(2,315)*		*(1,212)*	*(2,315)*
	%	*%*		*%*	*%*
Type of household			**Type of heating**		
Pensioner only	4	13	Coal/oil	1	9
Adults, no children	5	11	Electric	1	11
Adults, with children	6	11	Gas	7	11
One parent h'hold	5	11	**Telephone switcher****		
Type of house			Yes	7	13
Detached	6	13	**Gas switcher**		
Semi	6	12	Yes	11	18
Terraced	6	10	No	5	9
Flat/maisonette	1	7	Dual Fuel*	21	46
Housing tenure			**Location**		
Owner occupied	7	12	Town/city	6	11
Rented-private	3	6	Village/countryside	3	11
Rented LA/HA	3	9			

Source: MORI

*Those who obtain both their gas and electricity from the same company
**Those who have switched their telephone supplier

Who Has Switched Gas Supplier so Far?

The proportion of gas switchers is estimated by Ofgem to stand at around 25%. This proportion was used to weight the data by gas switchers vs non-switchers.

Looking at the degree of gas switching by sub-group it is clear that some of the less well off groups have caught up with and overtaken better off customers. Thus, switching is highest among C2DEs, those not working, those in LA/HA rented accommodation, the over 65s and low income customers. Gas PPM users still lag behind the rest, however, as in the electricity market, though even here 14% have switched. This may be a trend which the electricity market experiences in later stages of its development of competition.

Proportion of Gas Switchers by Sub-group

	% Switchers			% Switchers	
	July/ Aug '98	**Sept/ Oct '99**		**July/ Aug '98**	**Sept/ Oct '99**
Base: All on mains gas	*(803)*	*(2,098)*		*(803)*	*(2,098)*
	%	%		%	%
Total	14	25	**Gas bill**		
Age			High	n/a	23
16-34	16	24	Medium	n/a	28
35-64	15	24	Low	n/a	26
65+	13	30	**Bank account**		
Social class			Yes	15	25
AB	11	20	No	12	27
C1	16	23	**Gas payment method**		
C2	15	29	DD/SO	17	28
DE	16	28	Cash/cheque	13	28
Working status			PPM	12	14
Working	15	22	Budget Card/plan	12	23
Not working	14	29	**Low income**	n/a	29
Type of household					
Pensioner only	n/a	32	**Type of heating**		
Adults, no children	13	25	Coal/oil }	13	42
Adults, with children	17	25	Electric }		18
One parent h'hold	n/a	24	Gas	15	25
Type of house			**Telephone switcher****		
Detached	12	21	Yes	n/a	26
Semi	16	24	**Electricity switcher**		
Terraced	15	29	Yes	n/a	41
Flat/maisonette	12	27	No	n/a	23
Housing tenure			Dual Fuel*	n/a	72
Owner occupied	14	24	**Location**		
Rented-private	13	13	Town/city	15	24
Rented-LA/HA	16	32	Village/countryside	14	28

* Those who obtain both their gas and electricity from the same company
** Those who have switched their telephone supplier

Reasons for Switching Electricity & Gas Suppliers

As previous studies have shown, the ability to obtain a cheaper price is clearly the biggest motivator for changing supplier. More than four in five electricity switchers spontaneously cite this, rising to almost nine in ten upon prompting. This reason is four times as likely to be spontaneously given as a reason for switching as any other single reason.

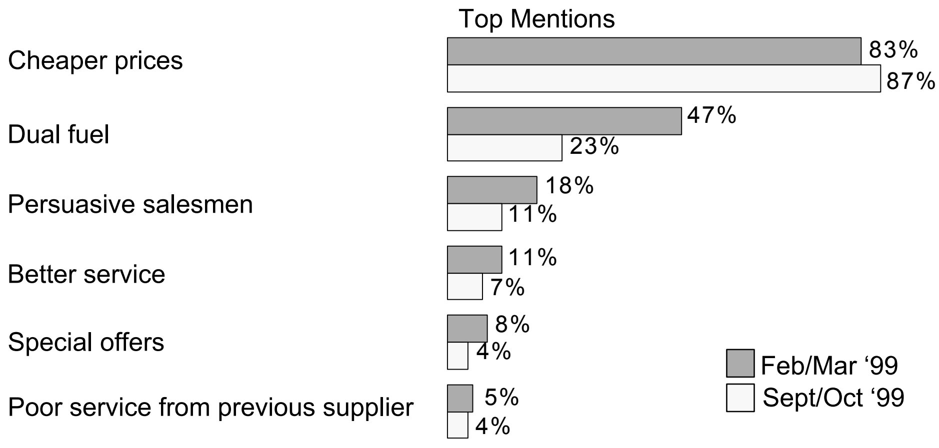
The ability to get both gas and electricity supplied from the same company is the second most popular reason for switching electricity supplier, mentioned by one-quarter after prompting. For some reason, though, it is a less important reason now than it was earlier in the year, when nearly half gave it, after prompting.

Persuasive salesmen are also an important influence on electricity switchers - for one in ten (after prompting). This figure is noticeably higher among some groups – DEs (18%), those who rent from LA/HA (22%), those who live in a flat or maisonette (19%), those on a low income (22%) and those on a state pension only (23%).

In the February/March report it was noted that a lesser weighting was given to quality of service when switching. This is still true - only one in fourteen cite the ability to have a better service as their reason for switching electricity supplier.

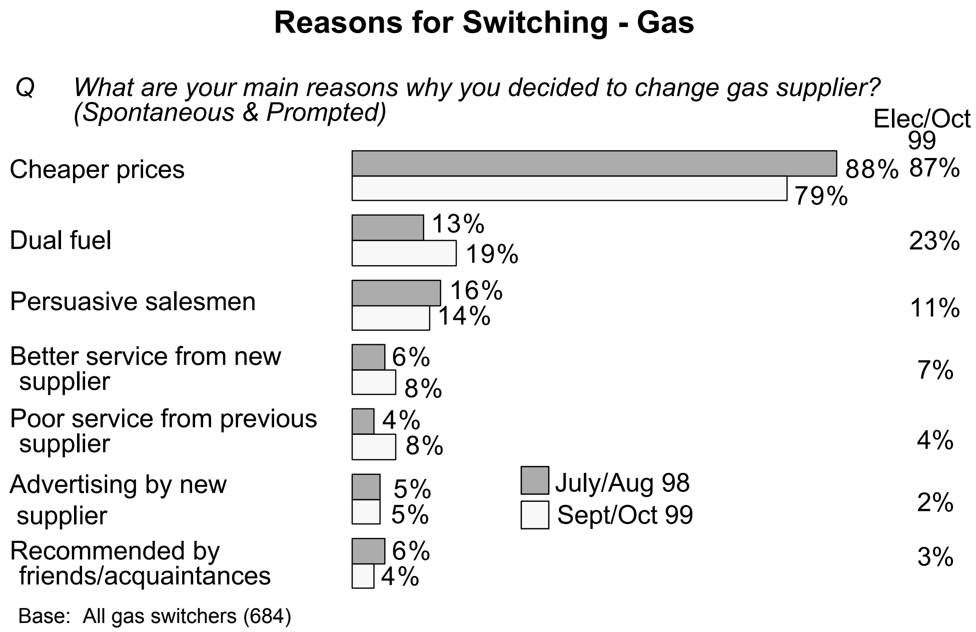
Reasons for Switching - Electricity

Q Which of these, if any, influenced your decision? (Spontaneous & Prompted)



Base: All electricity switchers (667)

The reasons for switching gas supplier are much the same as for electricity. One noteworthy difference is that gas customers are twice as likely to cite poor service as their reason for switching, although this figure remains at less than one in ten.



Although fewer mention dual fual as a reason for switching electricity supplier than was true earlier in the year, as the degree of electricity switching has risen, so too has the proportion who say they now have their gas and electricity supplied by the same company (from 8% in February/March 99 to 19% now). However, fewer of those customers say they were offered an additional discount as a result of this (4% compared to 54%).

Very few (just 2%) switched their gas supplier first or have **only** switched gas supplier. Over half (58%) say this has made no difference to their likelihood of switching their electricity supplier, though a significant minority (38%) say it has made them more likely to do so.

Even fewer switched their electricity supplier first or have **only** switched electricity supplier. This is more likely to have had a positive impact on their likelihood of changing gas supplier (46% say it has made them more likely) though care must be taken in the interpretation of these figures given the low base sizes.

Reasons for Not Switching Gas & Electricity Suppliers

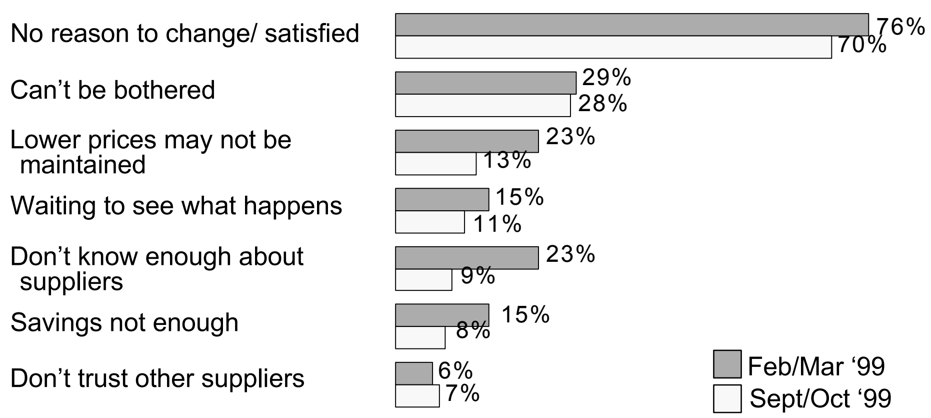
Since February/March there have been some positive changes hinting at a greater awareness and acceptance of competition. Consumers are now less likely to say that they 'see no reason to change/are satisfied (down six points), 'lower prices may not be maintained' (down ten points), 'savings are not enough' (down seven points), 'I have not been approached' (down eight points). Further illustrating the increased knowledge consumers have, there has been a marked fourteen point fall in the proportion of non-switchers who say they do not know enough about other suppliers.

As reported earlier in the year, there is a large element of inertia, which is preventing many people from switching electricity or gas supplier. Looking first at those who have not yet switched electricity supplier, two-thirds spontaneously state that they see no reason to change or they are satisfied with their current supplier, while one in five say that they can't be bothered or that changing is too much hassle.

Upon prompting the top reasons remain the same. However, additional factors come into play; around one in ten respectively mention that they are suspicious that lower prices: will not be maintained, that they are waiting to see what happens, that they do not know enough about the other suppliers or that the savings are not enough to warrant switching supplier.

Reasons for Not Switching - Electricity

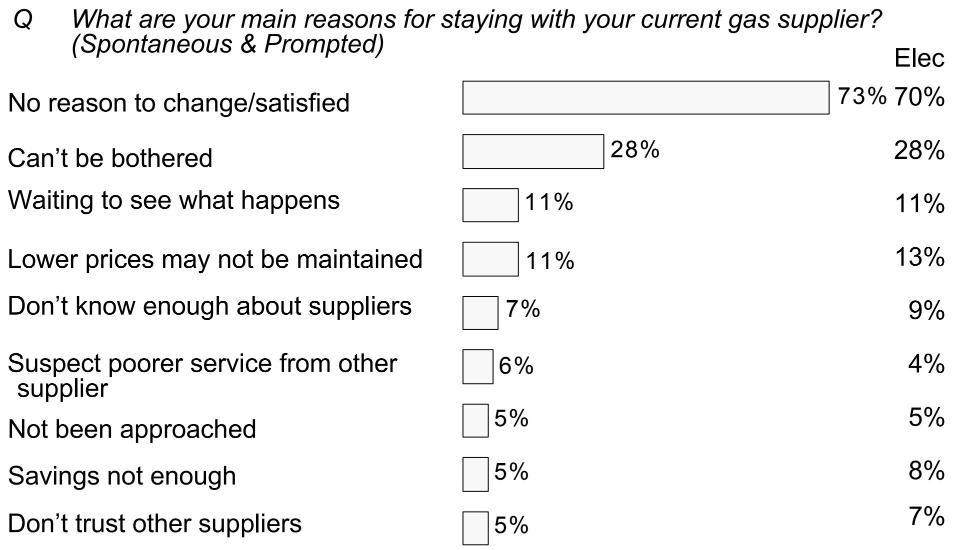
Q What are your main reasons for staying with your current electricity supplier? (Spontaneous + Prompted)



Base: All electricity non-switchers (1,648)

Reasons for not switching gas supplier are virtually identical to those given for not switching electricity supplier. However, gas consumers do seem marginally less likely to state that savings are not enough.

Reasons for Not Switching - Gas



Base: All gas non-switchers (1,414)

What Would Make Non-Switchers Switch?

The factors which would be most important to non-switchers in considering switching are the same as for those people who have already switched – reduced cost/price. This is clearly the most important factor, and stands out particularly so before prompting with a full list of possible factors. Two-thirds (67%), of those who have not switched electricity supplier mention a lower price spontaneously as something that might make them do so and three-quarters (75%) after prompting.

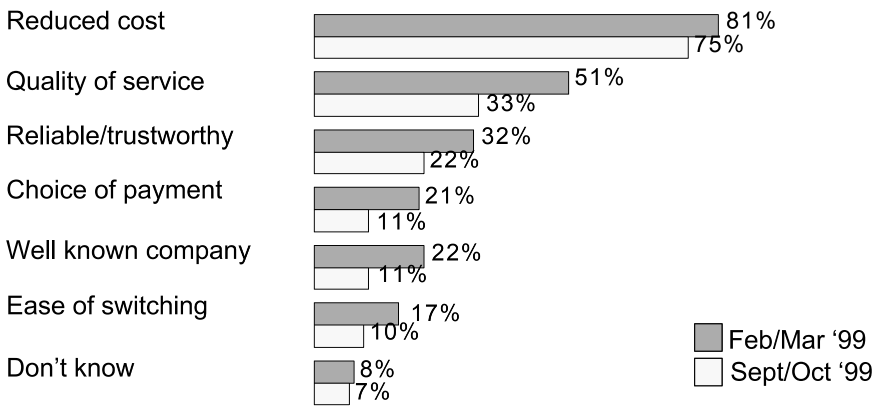
A reduction in cost is particularly important among 16-34 year olds (81%), those who are working (79%), those who rent privately (88%), those who are likely to change electricity supplier (90%), those with dual fuel (82%) and those who have difficulty paying (82%).

After prompting, other reasons are also given some importance, with one-third saying that the quality of service would be a most important factor in switching electricity supplier. However, this represents a marked eighteen point fall from the figure recorded at the start of the year. There has also been a fall for other factors - those who want a reliable/trustworthy supplier has seen a ten point fall, as have those who cite a choice of payment method and those who want their supplier to be a well-known company.

Dual fuel does not appear to be an important factor, with only one electricity non-switcher in twenty saying that being able to buy electricity and gas from the same supplier is an important factor.

Factors in Switching - Electricity

Q *If you were to change electricity supplier, what factors would be most important? (Spontaneous & Prompted)*

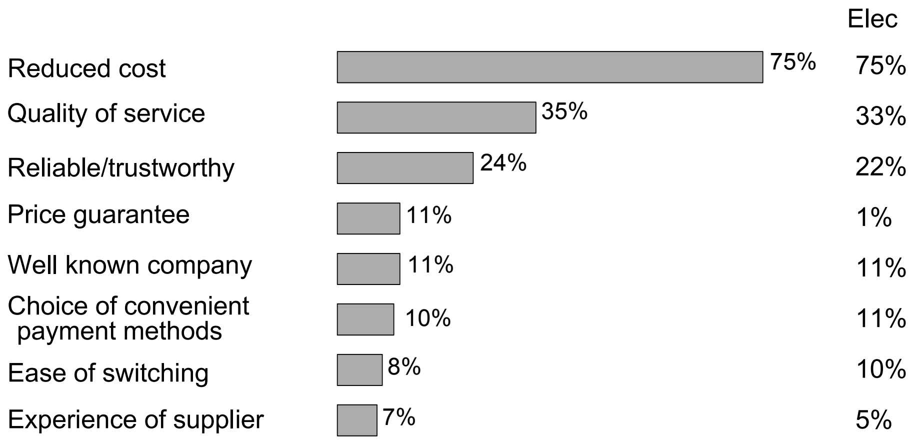


Base: All electricity non-switchers (1,648)

The only noticeable difference for the gas market is that a greater proportion call for a price guarantee (though still only one in ten, after prompting). This may be as a result of BGT's promise to keep prices constant to 2002. Seeing this in place, consumers may want a similar promise from other potential suppliers.

Factors in Switching - Gas

Q *If you were to change gas supplier, what factors would be most important to you when choosing a new gas supplier? (Spontaneous & prompted)*



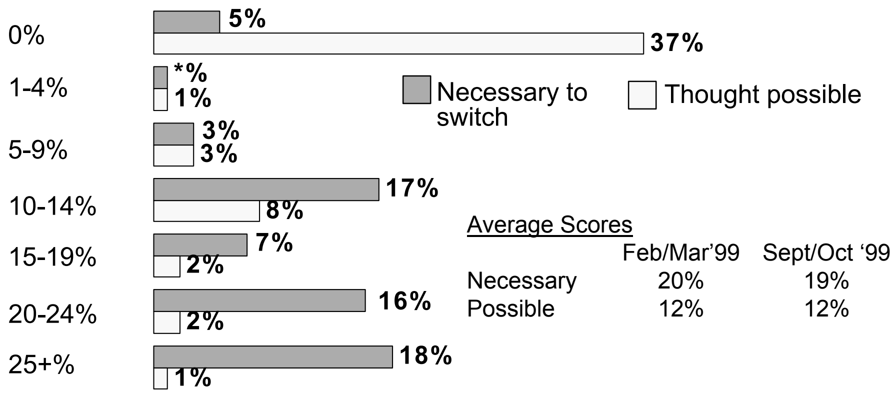
Base: All electricity non-switchers (1,414)

Reduction in Bill Required to Switch

As at the start of the year, we have compared the percentage savings non-switchers think they can get by changing supplier with the percentage reduction felt necessary for them to change supplier. If we look at average figures we can see that, in the case of electricity, the figure needed to change is seven percentage points higher than that thought possible – 19% vs 12% - while a similar differential is true of gas. As we have seen, price is **the** key reason for switching and so the feeling that the reductions possible are not sufficient to switch could be an important barrier.

Reduction in Bill Required to Switch – Electricity

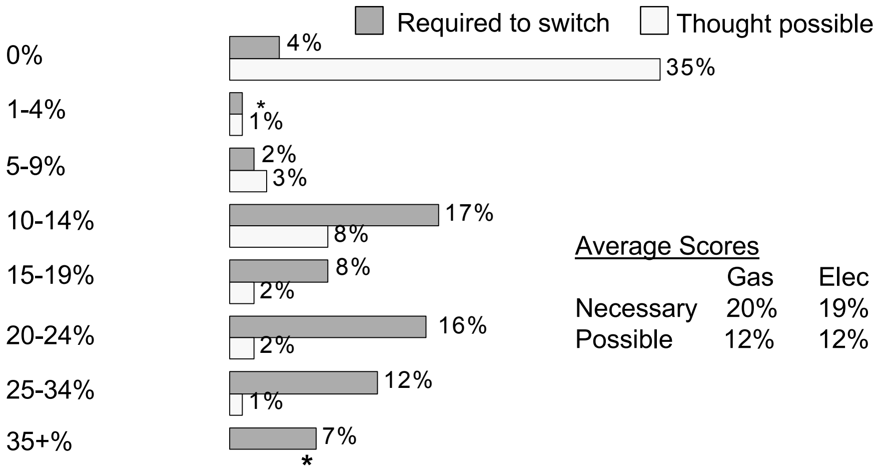
Q *Approx. what percentage reduction in your electricity bill, if any, would be sufficient for you to consider switching supplier?*



Base: All electricity non-switchers

Reduction in Bill Required to Switch - Gas

Q *Approx. what percentage reduction in your gas bill, if any, would be sufficient for you to consider switching supplier?*



Base: All gas non-switchers (1,414)

Ease of Switching

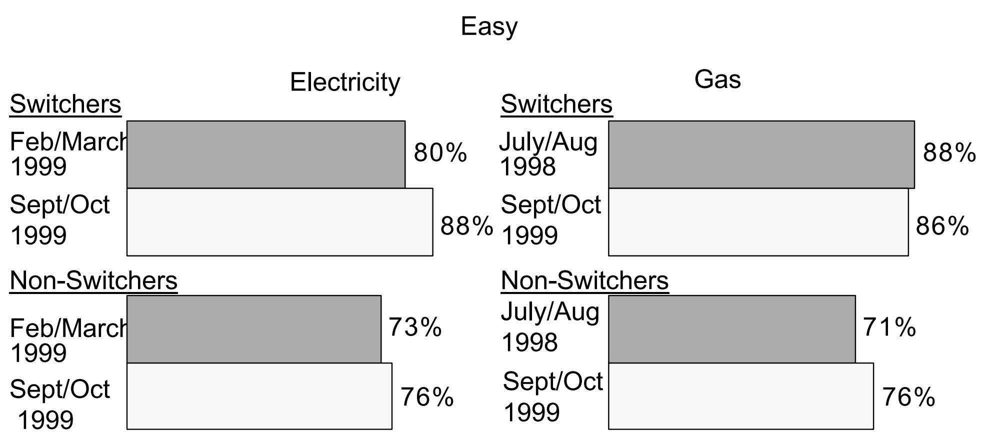
There is little concern over the difficulty of the actual switching process and this does not seem to pose a real threat to the take-up of new suppliers. Over three-quarters of gas and electricity non-switchers believe the process would be easy, including three in ten who believe it would be very easy. Less than one in ten believe that it would be difficult.

However, there is a minority of non-switchers – one in six - who do not have any idea whether switching supplier would be difficult or not.

Those non-switchers most likely to perceive some difficulty in the switching process are those in private rented accommodation, those on a low income, those who live in a flat or maisonette, those who have difficulty paying and those who pay by PPM. Even among these groups, however, the figure does not rise above one in six.

Among those who have actually switched already the message is even more positive, with the vast majority (over four in five and an increase in the case of electricity since earlier in the year) stating that the process of switching electricity or gas supplier for them was an easy process. As previously, those who have switched are much more likely than non-switchers to believe it to be very easy (around six in ten think it was).

Ease of Switching



Base: All switchers/non-switchers

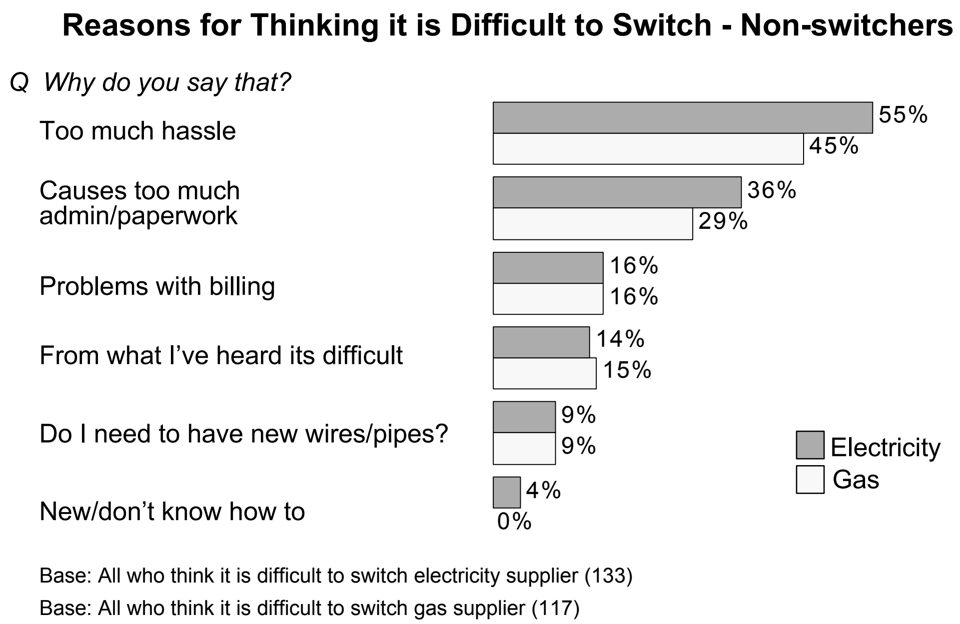
Ease of Switching – Comparison of Electricity and Gas

	Switchers		Non-Switchers	
	Electricity	Gas	Electricity	Gas
Base: All	*(667)*	*(684)*	*(1,648)*	*(1,414)*
	%	%	%	%
Very easy	60	65	29	30
Fairly easy	28	21	47	46
Fairly difficult/not very easy	5	5	7	7
Very difficult/not at all easy	2	3	2	2
No opinion	6	6	16	15

Source: MORI

The main reason for thinking it is difficult to change supplier, among non-switchers, relates to a general feeling that it would be too much hassle. Over half (55%) of those who have not switched electricity supplier and who believe it is difficult to switch cite this as a reason and a further one-third believe that there will be hassle in the form of too much administration or paperwork (36%). Around one in six are worried about problems with billing, while slightly fewer say that they have heard that it is a difficult process. One in ten of those who think it difficult are concerned that they may need to have new wires – this however represents only 15 people out of the overall sample.

Noticeably, fewer say it is difficult to switch gas supplier because it will be too much hassle.



Were Electricity Switchers Misled in Any Way?

Most consumers do not feel they were misled by their new electricity supplier. Overall, only a small minority of switchers (11%) feel they were. For a third of those who feel they were misled the main reasons are related to the fact that they are now paying more than they were expecting to when they switched. Additionally, three in ten feel that information was withheld from them when they decided to switch.

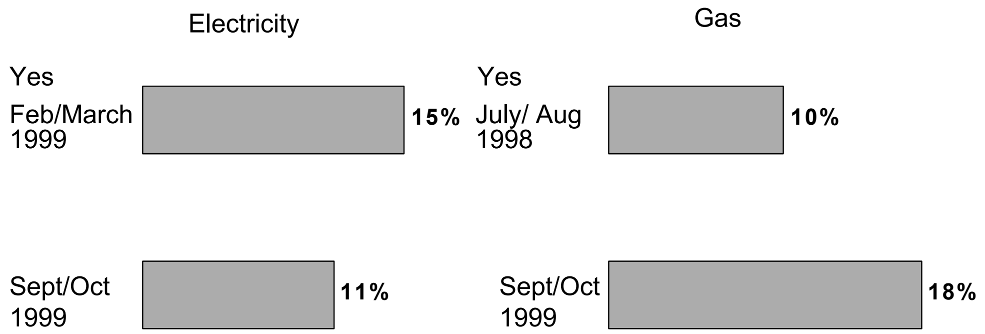
Of those who feel they were misled, one in five thought they were signing for information only or felt pressured into changing. However, this represents less than one percent (nine people and eight people) of the total sample respectively.

More gas consumers say they were misled by new suppliers. While the proportion who feel misled by electricity suppliers has fallen by four points since the Spring, this figure has gone up by eight points for gas since Summer '98, and now stands at 18% of gas switchers.

While generally the ways gas switchers say they were misled are the same as electricity switchers, there is a greater proportion who feel that information was kept from them (41% vs. 29%). However, none says they were given wrong information. The length of time it takes to switch seems to be marginally more of a problem in the gas market, with one in ten stating that the process took longer than they thought it would.

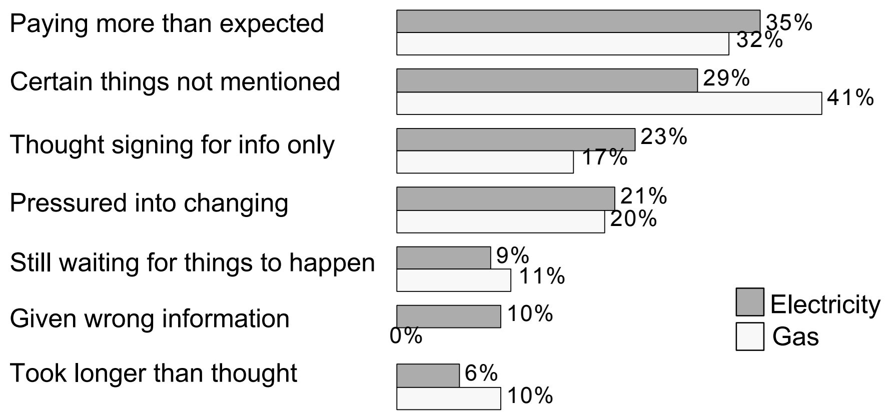
Were Switchers Misled?

Q Did you feel misled in any way by any of the information you received from your supplier?



Base: All switchers/non-switchers

How were Switchers Misled?

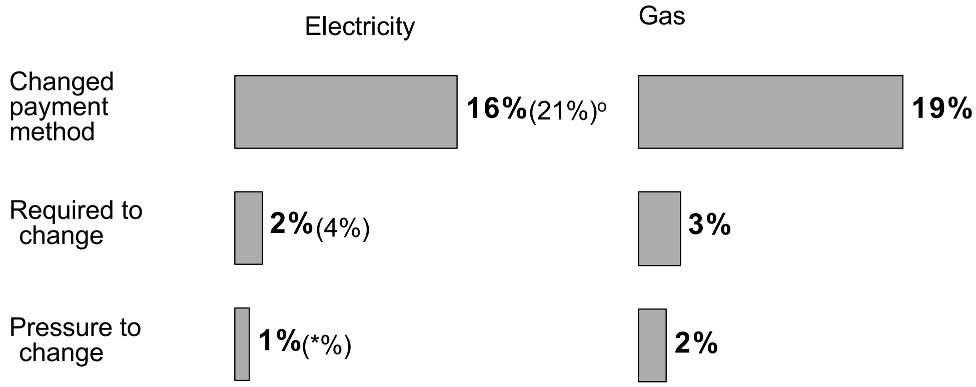


Base: All who feel they were misled - Electricity (79), Gas (103)

Were Switchers Required to Change Their Payment Method?

Overall, 16% of electricity switchers and 19% of gas switchers changed their payment method when they switched supplier. Just 5% of gas switchers and 3% of electricity switchers say that they were either required to change their payment method or that pressure was placed on them to do so.

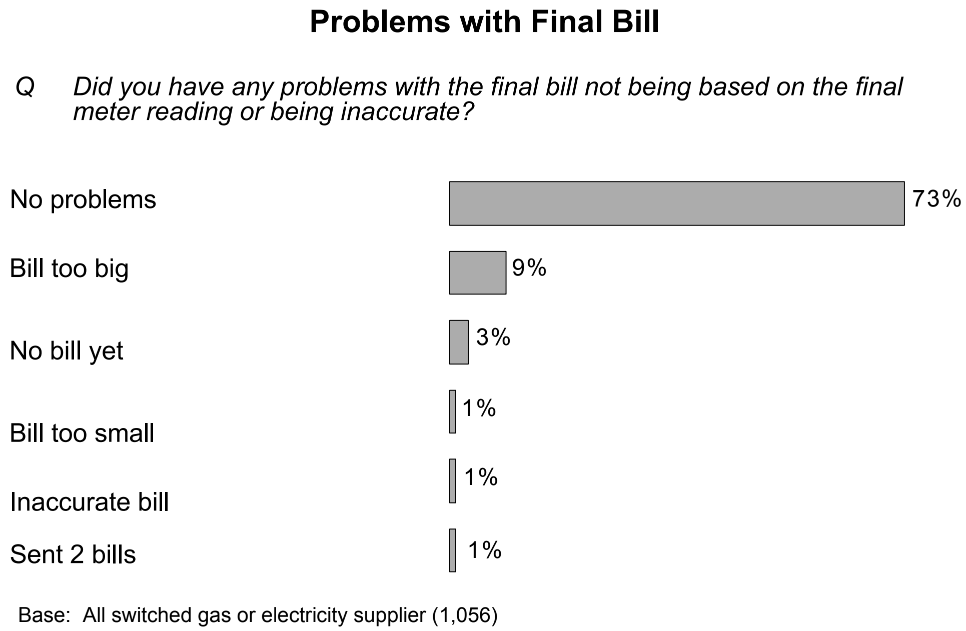
Did Switchers Change Payment Method?



° Feb/Mar 1999 figures
Base: All electricity switchers (667)
Base: All gas switchers (684)

Did Switchers Have Any Problems With Their Final Bill?

On the whole, those who have switched either their gas or electricity supplier had no problems at all with their final bill (three-quarters say this is the case). Of those who did, the main problem experienced was that the bill was too large (10%).



Satisfaction with Present Supplier

Approaching nine in ten electricity non-switchers and three-quarters of gas non switchers are satisfied with their current supplier – this includes over one-third who are very satisfied. As already seen, the main reason why non-switchers have not changed their electricity supplier is that they have no reason to change because they are content with their present supplier. Consequently, there is little motivation for many customers to switch supplier.

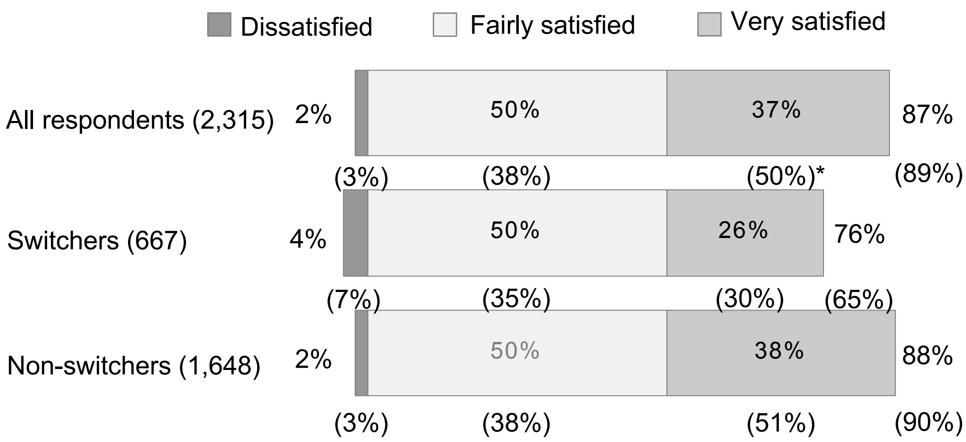
There is little difference in satisfaction across different groups of individuals with the vast majority satisfied with both their electricity and gas suppliers. However, there is a tendency for non-switchers to be more satisfied than those who have changed supplier, particularly in the case of electricity. This may be because those who have switched may be more discerning or critical consumers.

In this phase of the study we also examined satisfaction with individual aspects of supply. These, by and large, reflect very positively on suppliers, with satisfaction far outweighing the dissatisfied minority. Seven in ten or more are satisfied with the ease of contact with their electricity supplier, the accuracy of estimated readings and the frequency of meter reading, while the highest score is for maintaining a constant supply, with more than nine in ten satisfied. Energy efficiency advice obtains the lowest score, but this is likely to be as a result of lack of awareness of what this actually constitutes, as opposed to receiving it and not being happy with the service received.

For the aspects of service measured – save for energy efficiency advice – gas suppliers receive a lower score. Again a clear majority are satisfied with aspects of their service but figures are between six and eleven points lower than those achieved by the electricity suppliers.

Satisfaction With Current Electricity Supplier

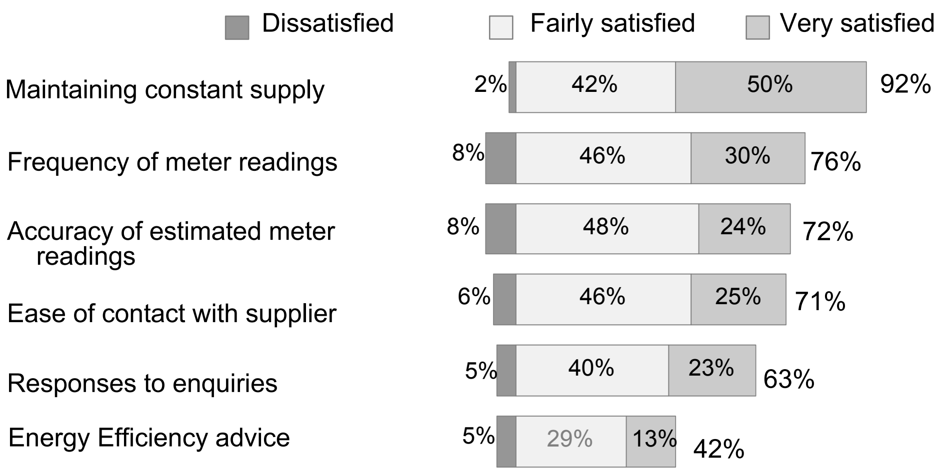
Q *How satisfied or dissatisfied are you with the overall service from your present electricity supplier?*



Base: All respondents (2,315) * Feb/March '99 figures are in brackets

Satisfaction with Current Electricity Supplier

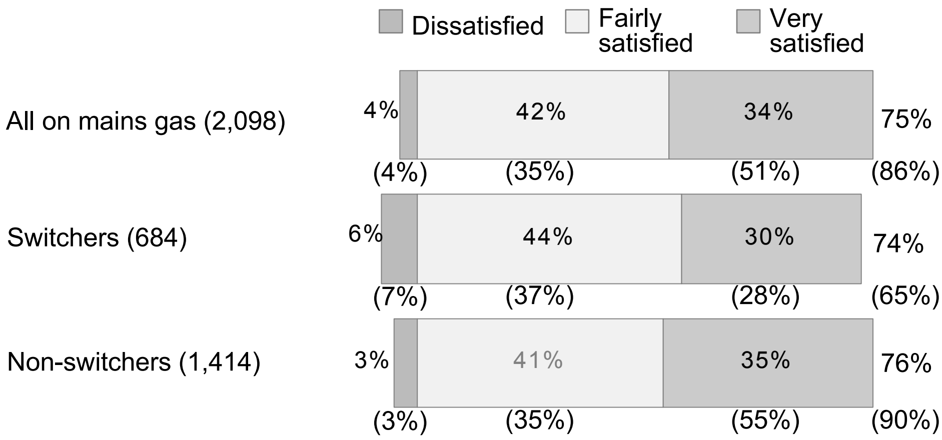
Q *How satisfied or dissatisfied are you with the following from your present electricity supplier?*



Base: All respondents (2,315)

Satisfaction with Current Gas Supplier

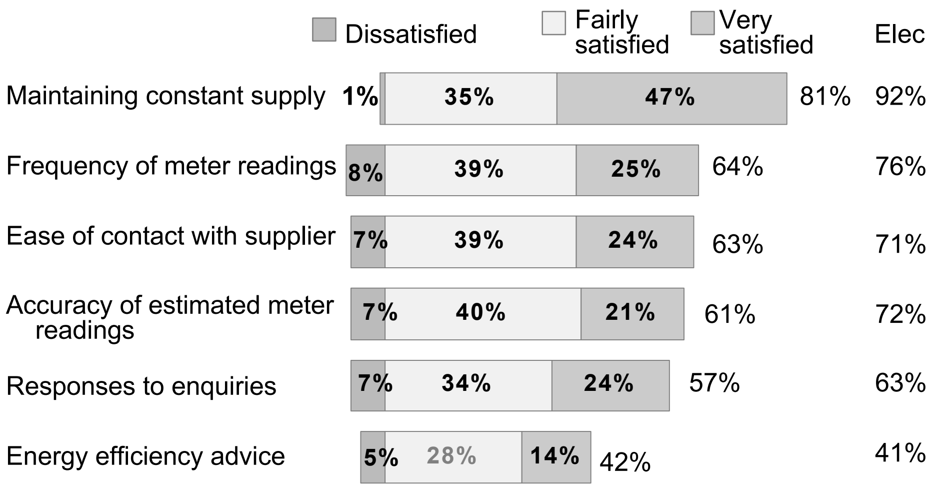
Q *How satisfied or dissatisfied are you with the overall service from your present gas supplier?*



Base: All on mains gas (2,098) †Jul/Aug '98 figures are in brackets

Satisfaction with Current Gas Supplier

Q *How satisfied or dissatisfied are you with the following from your present gas supplier*

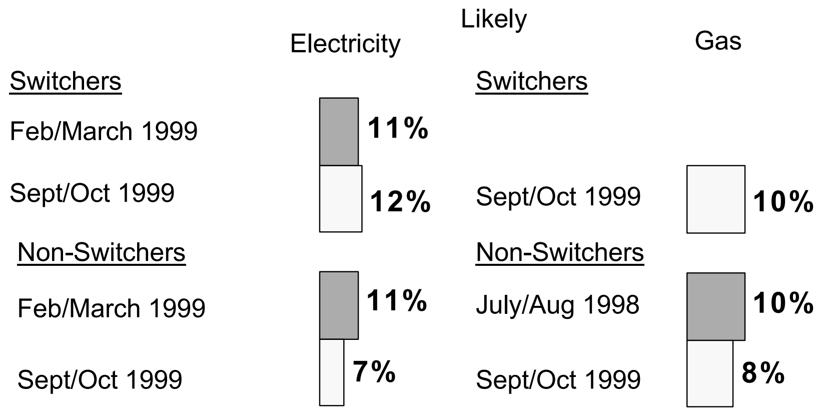


Base: All on mains gas (2,098)

Likelihood of Switching in the Next 12 Months

Fewer than one in ten electricity and gas non-switchers are likely to switch supplier in the next 12 months and, of these, only 2% of electricity non-switchers and 3% of gas non-switchers are either certain to or very likely to. Three in ten go so far as to say they are certain not to switch.

Likelihood of Switching Gas/Electricity Supplier in Next 12 months?



Base: All switchers/non-switchers

Just 10% of gas switchers and 7% of electricity switchers say they have changed supplier more than once and around one in ten say they are likely to switch supplier again in the next 12 months (marginally higher than the propensity to switch among non-switchers).

In the gas market, we found that over time the lower social classes (C2DEs) caught up and overtook ABC1s. It does not look like the electricity market will follow this pattern in the next 12 months, at least if one adds together those who have already switched with those non-switchers who are likely to switch in the next 12 months. However, it seems likely that as awareness and knowledge of electricity competition increases among the lower social classes that they will follow the pattern of the gas market.

	Electricity		
	Switchers	Likely to switch	Total
	%	%	%
Total	11	7	18
Age			
16-34	7	10	17
35-64	13	5	18
65+	13	3	16
Social class			
AB	14	9	23
C1	11	7	18
C2	9	6	15
DE	10	3	13
E	10	3	13
Working status			
Working	11	9	20
Not Working	10	4	14
Type of household			
Pensioner only	13	3	16
Adults, no children	11	6	17
Adults, with children	11	8	19
One parent h'hold	11	7	18
Low income	7	2	9
Type of house			
Detached	13	9	2
Semi	12	5	17
Terraced	10	6	16
Flat/maisonette	7	8	15
Electricity bill			
High	12	7	19
Medium	11	8	19
Low	9	6	15
Bank account			
Yes	11	7	18
No	8	1	9
Payment method			
DD/SO	15	7	2
Cash/cheque	11	6	17
PPM	3	6	9
Budget Card	6	5	11
Type of heating			
Coal/oil	9	7	16
Electric	11	5	16
Gas	11	7	18
Telephone switcher			
Yes	13	8	21
Gas switcher			
Yes	18	8	26
No	9	6	15
Location			
Town/city	11	7	18
Village/countryside	11	7	18

Method of Payment

Present Method of Payment Used

Prepayment meters are the third most frequently used method for electricity, but on a par with quarterly direct debit/standing order. The gap between the proportion of PPM payers in the electricity and gas markets appears to be closing, though PPM continues to be a more popular choice for paying the electricity bill.

Q *In which of these ways do you normally pay for your electricity/gas?*

	Electricity	Gas
Base All:	*(2315)*	*(2098)*
	%	%
Quarterly		
Cash/cheque	29	29
DD/SO	11	12
Monthly		
Cash/cheque	2	3
DD/SO	34	34
PPM	17	11
Budget Card Plan	3	5
Regular weekly/fortnightly cash scheme	2	2
Savings Stamps	1	1

Source: MORI

Reasons for Present Method of Payment

As we saw in Spring this year, the ease and convenience with which bills can be paid are generally the most important factors when consumers choose their payment method.

For direct debit/standing order customers and PPM payers the next most important reason is that it is the best way of budgeting. For quarterly cash/cheque and PPM customers this is joined by the ability to have an element of control over payments. This is further emphasised by one in five PPM customers who want to pay only for what they have used, when they have used it.

There also appears to be a significant level of inertia among quarterly cash/cheque customers, with one-quarter stating that they pay by this method because they have always done so. Additionally, being able to pay when the bill arrives is also a factor for these customers. One in eight quarterly cash/cheque customers pay in this way because they dislike direct debit.

As past research and other findings in this study illustrate, generally people pay in the way they do because this is how they want to pay. Only one person in fifty stated that they had no choice in how they pay for their electricity.

Q Why do you pay for your electricity/gas bill by….?

	Electricity			Gas		
	DD/ SO	**Quarterly Cash/ Cheque**	**PPM**	**DD/ SO**	**Quarterly Cash/ Cheque**	**PPM**
Base: All	*(1050)*	*(700)*	*(348)*	*(1020)*	*(617)*	*(186)*
	%	%	%	%	%	%
Easy/convenient	87	66	64	87	64	64
Best way of budgeting	25	17	39	27	12	44
Cheaper	10	*	1	10	1	*
Have control over payments	5	19	27	5	20	22
Always paid in this way	8	23	12	6	22	8
Pay for what I have used, when I use it	*	7	21	1	7	17
Pay when bill arrives	1	15	0	*	15	1
Dislike Direct Debit	*	12	2	*	15	1

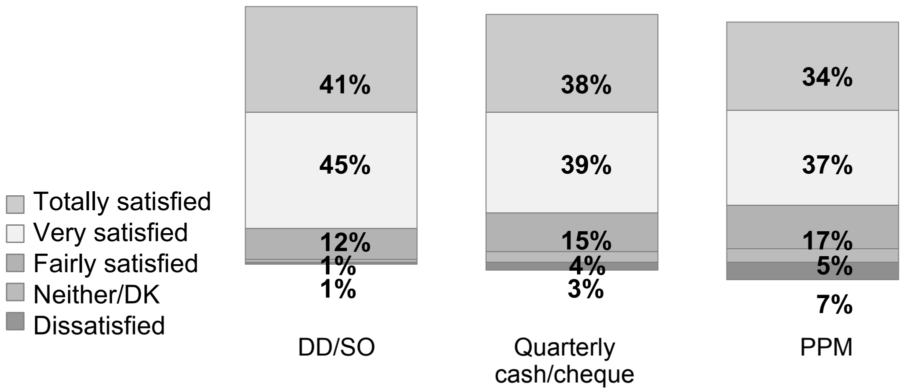
Source: MORI

A similar pattern emerges when we look at why customers pay for their gas in the way they do.

Satisfaction with Payment Method

Satisfaction with the current method used to pay for electricity is almost universal, with 94% satisfied overall. This includes four in five who are either totally satisfied (39%) or very satisfied (41%). There is also little variation by method of payment. Satisfaction is greatest among budget card, direct debit/standing order and regular cash scheme customers, but among even the least satisfied group – PPM customers – nine in ten (89%) are satisfied.

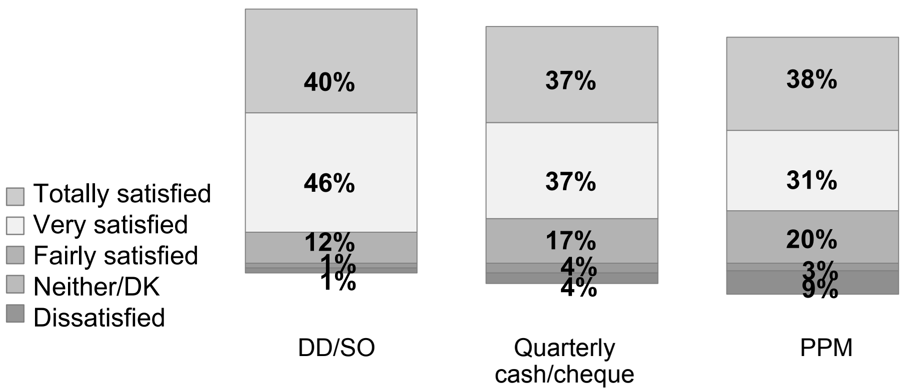
Satisfaction with Payment Method – Electricity



Base: All respondents (2,315)

Almost identical figures are true in relation to gas.

Satisfaction with Payment Method – Gas



Base: All on mains gas (2,098)

Awareness of Price Differential by Payment Method

While very content with their current method of payment, customers do display a lack of awareness regarding the relative costs of the payment method they use. When asked if they thought the method they currently use to pay for their electricity is the cheapest there is a large proportion of customers who either wrongly think it is or do not know whether they pay by the cheapest method. While almost two-thirds of direct debit/standing order customers are aware that they are paying by the cheapest method, there remain three in ten who either do not think it is the cheapest method (4%) or do not know whether it is or not (28%).

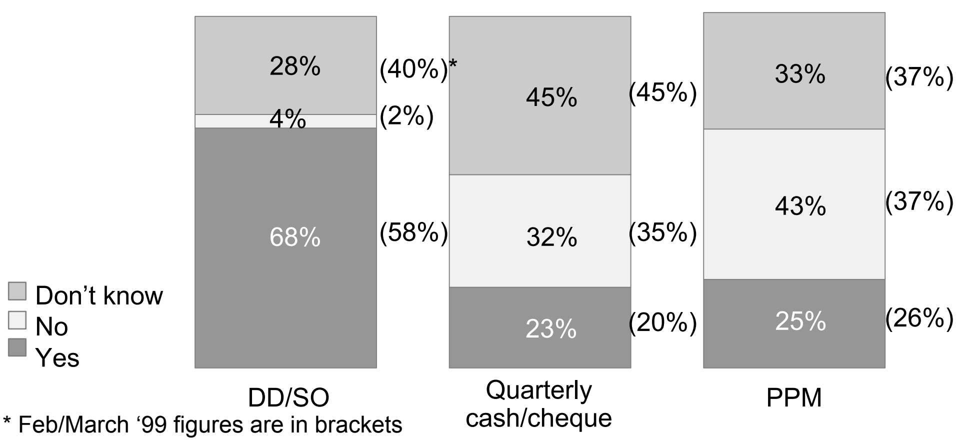
Awareness of price differentials is noticeably lower among those customers who are not paying by the cheapest method. Around one-quarter of quarterly cash/cheque (23%) and PPM (25%) customers respectively incorrectly believe that their current payment method is the cheapest. A significant proportion also do not know if their chosen payment method is the cheapest – quarterly cash/cheque (45% don't know), PPM (33% don't know).

However significant proportions –32% of cash/cheque payers and 43% of PPM customers - still pay for their electricity in this way even though they know it is not the cheapest. This indicates that the aforementioned reasons/benefits for paying in the way that they do outweigh any potential of the perceived cost savings available from paying by DD. Those who are aware that they are not paying by the cheapest method again say they use their current method because of its ease and convenience, and the ability to budget and control payment in a way that they feel comfortable with.

Once again, the picture for gas payment is virtually identical.

Awareness of Relative Costs - Electricity

Q Is this the cheapest method offered by your electricity supplier?

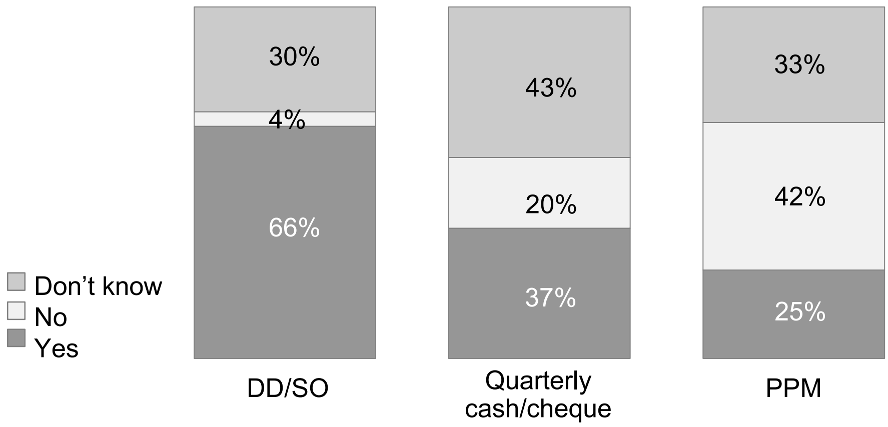


* Feb/March '99 figures are in brackets
Base: All respondents (2,315)

MORI

Awareness of Relative Costs - Gas

Q *Is this the cheapest method offered by your gas supplier?*



Base: All on mains gas (2,098)

Ideal Method of Payment for Electricity & Gas

Further evidence of the level of satisfaction with payment methods is that, when asked ideally how they would like to pay for their electricity and gas, there are virtually no significant differences with the method by which they currently pay.

The only marginal difference is that, for both electricity and gas, slightly fewer customers would like to pay by quarterly cash/cheque or PPM than currently do so, and slightly more would like to pay by direct debit or standing order.

Q *In which of these ways do you normally pay for your electricity/gas?*

	Current Electricity	Ideal Electricity	Current Gas	Ideal Gas
Base: All	*(2,315)*	*(2,315)*	*(2,098)*	*(2,098)*
	%	%	%	%
Quarterly				
Cash/cheque	29	26	29	26
DD/SO	11	13	12	13
Monthly				
Cash/cheque	2	3	3	3
DD/SO	34	35	34	36
PPM	17	15	11	10
Budget card plan	3	4	5	5
Regular weekly/fortnightly cash scheme	2	2	2	3
Savings stamps	1	1	1	1

Source: MORI

Dual Fuel Billing

When opting for dual fuel, almost half would prefer to keep separate bills. There is also one-quarter of customers who would prefer a joint bill but with gas and electricity prices separated. Far fewer would want a joint bill with both charges combined.

This pattern holds true even among those who currently receive their gas and electricity from the same supplier; indeed, even more would prefer separate bills (56%). This does leave a significant minority, though, who would prefer some form of joint bill (39%), rather more than currently receive one (18%).

Q When buying gas and electricity from the same company, which of these would you prefer?

	All with mains gas (Prefer)	Dual Fuel Customers (Prefer)	Dual Fuel Customers (Current Method)
Base:	*(2,098)*	*(708)*	*(708)*
	%	%	%
Prefer separate bills	47	56	70
Joint bill with gas and electricity charges shown separately	27	30	13
Joint bill with gas and electricity charges combined	6	9	5
Would not buy from the same company	8	-	-

Source: MORI

Prepayment Meter Customers

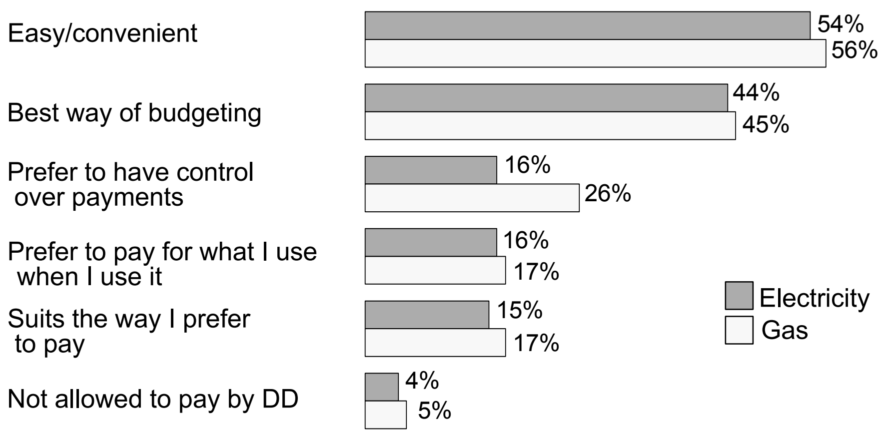
Reasons for Using Prepayment Meter

Around half of both electricity and gas PPM customers pay for their supply in this way because it is either easy or convenient for them to do so. Additionally, many see it as the best way to control their budgeting or as a good way to maintain control over their payments.

When asking those who are aware that paying by PPM is not the cheapest method why they still choose to do so, the reasons are much the same.

Reasons for Preference of PPM

Q What are your main reasons for not choosing a cheaper method of payment offered by your supplier?



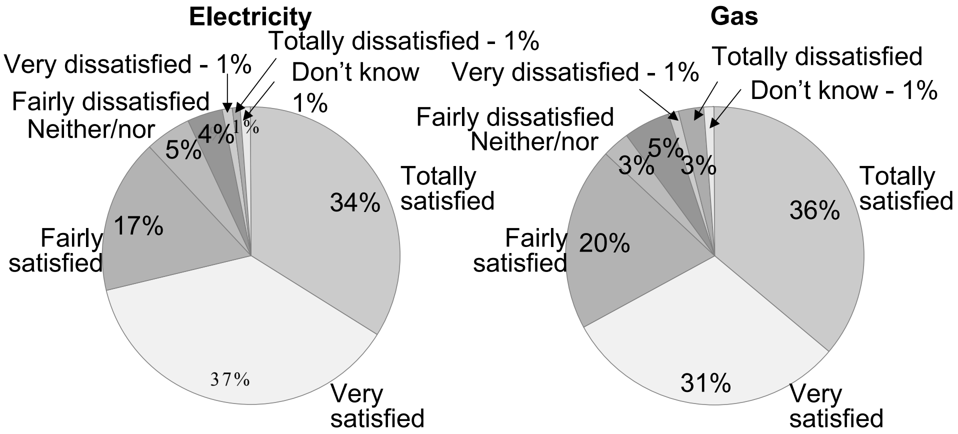
Base: All PPM customers who know it is not the cheapest method-electricity (143), gas (78)

Satisfaction with Prepayment Meters

Around nine in ten PPM electricity (89%) and gas (87%) customers are satisfied with the method they use to pay for electricity. Satisfaction has changed little since the start of the year.

Satisfaction with PPMs

Q *Overall how satisfied are you with the method you use to pay for electricity/gas?*



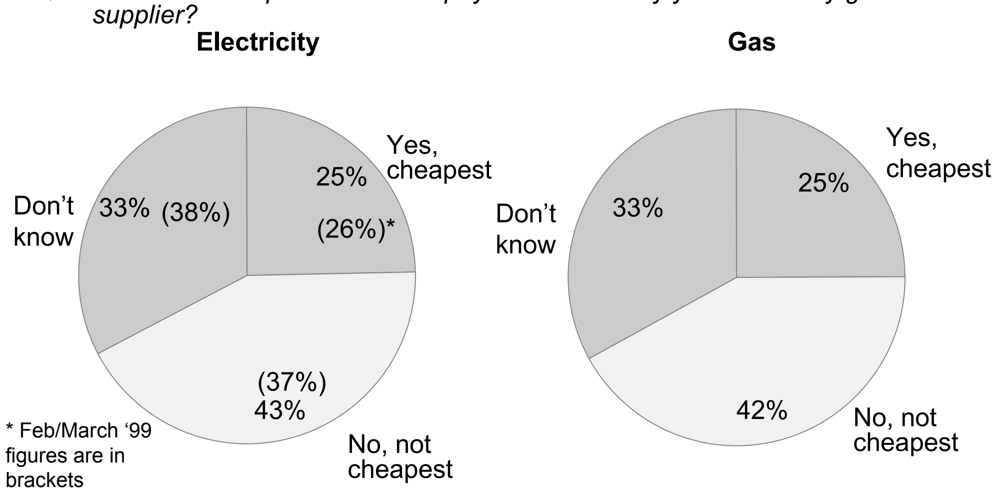
Base: All electricity PPM respondents (348) Base: All gas PPM respondents (186)

Awareness of Prepayment Meter Costs

Around one-quarter of electricity and gas PPM customers wrongly believe that they are paying by the cheapest method for their supplies and a further one-third do not know whether they are paying by the cheapest method.

Prepayment Meters - Awareness of Cost

Q *Is this the cheapest method of payment offered by your electricity/gas supplier?*



Base: All PPM customers - electricity (348) Base: All PPM customers - gas (186)

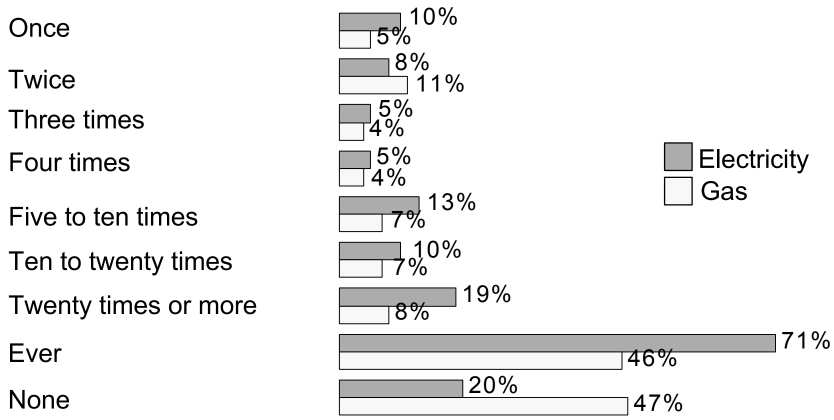
Emergency Credit

A clear majority of electricity PPM customers have used emergency credit in the last year, including one in five who have used it twenty times or more. Only one in five electricity customers have not used emergency credit during the last year.

Gas consumers are much less likely to use emergency credit; while almost half have used it during the last year, the frequency is noticeably lower. Only one in fourteen gas PPM customers have used emergency credit twenty times or more.

Emergency Credit - Incidence of use

Q *In the last 12 months, approximately how many times have you had to use the emergency credit on your meter?*



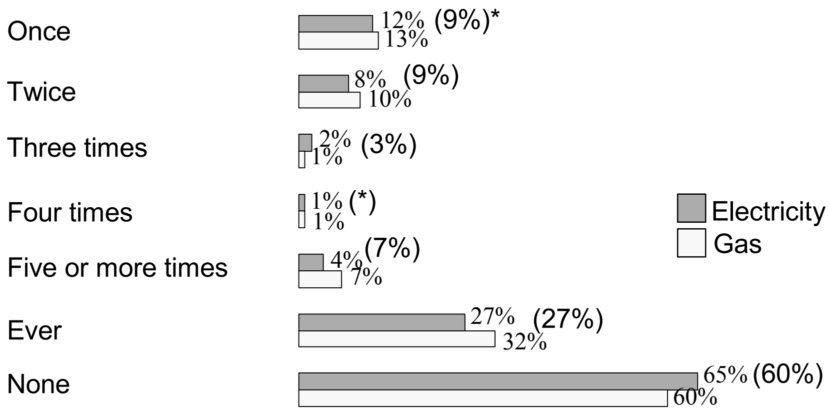
Base: All PPM customers - Electricity (348), Gas (186)

Self-Disconnection

The majority of PPM customers have not run out of electricity (65%) or gas (60%) in the last year. However, there remains a significant minority who have been without one or both supplies at some point during the last year. In contrast to the use of emergency credit, the proportion of customers who have run out is marginally higher among gas PPM customers (32%) than electricity PPM customers (27%).

Self Disconnection - Incidence

Q In the last 12 months, how many times have you run out of electricity/gas?



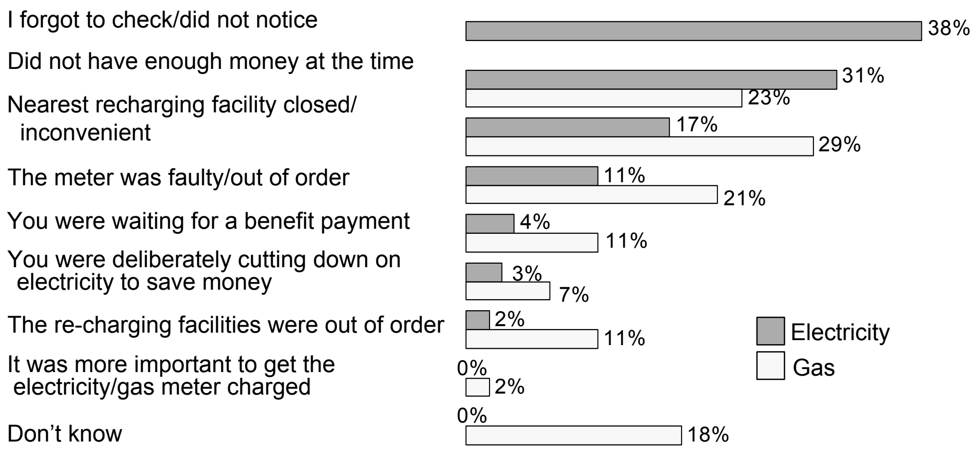
* Feb/March '99 figures are in brackets
Base: All PPM customers - Electricity (348), Gas (186)

The main reason two in five electricity customers have run out electricity is that they forgot to check or did not notice. An additional third say it was because they did not have enough money at the time (a ten point increase since the start of the year).

For those who have self-disconnected their gas supply the main reason is that the nearest recharging facility was either closed or too far away (29% compared to 17% for electricity). For around one in five respectively the reason was a lack or money at the time or that the actual meter was faulty or out of order. One in five of those who self-disconnected their gas supply cannot recall the reason for doing so.

Self Disconnection - Reasons

Q What have been the reasons for running out of electricity/gas?



Base: All PPM customers who have run out of Electricity (89), Gas (49) in last 12 months

Using Less Fuel Than is Needed

Using a prepayment meter does seem to impact upon the amount of electricity and gas that is consumed. One-quarter of electricity PPM customers say they do not use as much as they really need to, compared with 17% overall. For gas customers this figure is even higher, with three in ten feeling they do not use as much gas as they really need to.

Q Do you generally use less electricity/gas than you really need to use?

	All Elec' Customers	Elec' PPM customers	All Gas Customers	Gas PPM customers
Base: All	(2,315)	(348)	(2,098)	(186)
	%	%	%	%
Yes	17	24	18	30
No	75	70	72	64
Don't know	8	5	9	6

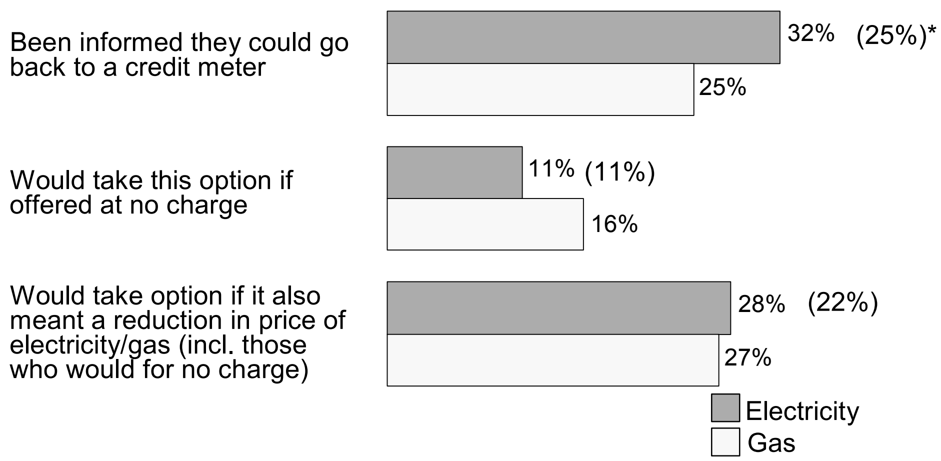
Source: MORI

Returning to a Credit Meter

One-third (a seven point increase) of electricity PPM customers and one-quarter of gas PPM customers claim to have been given the option to return to a normal credit meter. As found at the start of the year, the elderly appear less likely to have been informed that they can return to a credit meter.

If this option was offered to all PPM customers and no cost was incurred for doing so, only 11% of electricity PPM customers and 16% of gas PPM customers would give up their prepayment meter. If this option meant a reduction in the price charged for electricity or gas the propensity of changing meters increases, with more than one-quarter saying they would take up a normal credit meter.

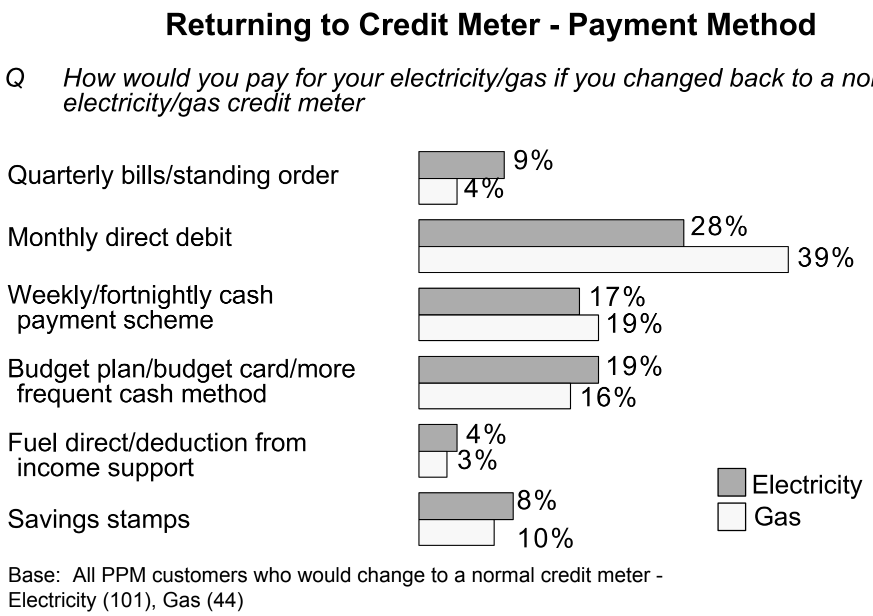
Prepayment meters - Returning to Credit Meter



* Feb/March '99 figures are in brackets
Base: All PPM customers - Electricity (348), Gas (186)

If PPM customers did choose to go back to a credit meter, the most popular payment method would be monthly direct debit. This is the case for both electricity and gas customers, although this figure is noticeably higher for gas consumers.

Quarterly cash/cheque would not be a very popular payment method, with less than one in ten electricity customers and only one in twenty-five gas customers saying they would choose this option.



Disadvantaged Customers

In the last study we looked separately at the awareness, experiences and attitudes of disadvantaged customers. Here we have re-produced those tables with the October 1999 data and have commented upon findings specific to this group.

Definition

For the purposes of this research, a number of categories have been identified as indicating 'disadvantaged' customers and the results analysed by these different categories.

The different groups are as follows:

- Low income customers, with a household income of less than £5,000 pa
- Those in social classes D and E, particularly the latter
- Benefit recipients (such as income support, housing benefit, council tax benefit)
- The elderly and, particularly, those who receive a state pension only rather than an additional occupational pension
- Those without a bank or building society account
- Single parent families
- Prepayment meter customers
- Those who have difficulty paying their bills - as defined in the introduction

These groups form between 7% (those with an income of less than £5k pa) and 29% (those in social class DE) of home energy customers.

There is, of course, a high degree of overlap between the different groups. For instance 70% of those with an income under £5k per year are also in receipt of benefits, while 30% of those in social class E have a yearly income under £5k.

There are some important differences between some of the groups, though. For instance, very few prepayment meter customers are elderly - just 5% are over 65 years old and three in five are under 35. Similarly, though a higher percentage of the disadvantaged customers tend to be 'not working' than is true of the population as a whole, this is not true of those who have difficulty paying their bills.

Overlap Between Disadvantaged Groups

	All	Social class E	One parent families	HH income under £5k	Receive benefits	Elect-ricity PPM	Gas PPM	State pension only	No bank/ BS account
Base: All	*(2,315)* %	*(399)* %	*(151)* %	*(166)* %	*(535)* %	*(348)* %	*(186)* %	*(206)* %	*(200)* %
Age									
16-34	36	38	75	49	52	61	59	2	44
35-64	43	33	24	24	34	35	37	15	33
65+	21	29	1	27	14	4	5	83	23
Class									
AB	22	0	8	*	4	2	4	6	0
C1	27	0	18	14	16	16	16	9	3
C2	23	0	8	7	12	22	20	14	12
DE	29	100	66	79	68	60	60	71	85
E	17	100	52	69	51	38	43	58	70
Non-working	47	98	64	90	72	53	60	92	82
One parent families	8	24	100	28	27	27	28	1	25
Rent from LA/HA	26	67	67	63	64	70	68	38	80
No bank/BS account	9	37	29	39	28	27	32	21	100
HH income <£5k	7	30	26	100	22	20	21	18	32
Receive benefits	23	71	81	70	100	60	62	31	73
Electricity PPM customers	17	40	60	49	45	100	87	8	54
Gas PPM customers	11	28	40	32	30	55	100	8	40

Source: MORI

Certainly, though 'disadvantaged' customers are more likely to pay by PPM than the average customer, this is by no means the only way that they pay their bills, as is clear from the table below. For instance, just 8% of those on a State Pension and no occupational pension pay by PPM; this group prefers to pay by quarterly cash/cheque (43% for electricity and 40% for gas) or even by direct debit or standing order (28% for electricity and 30% for gas). Though still below the average customer, as many as 21% of single parents and 18% of benefit recipients pay for their electricity by direct debit/standing order.

Method of Payment

	All	**Social class E**	**One parent families**	**HH income under £5k**	**Receive benefits**	**Elec PPM**	**Gas PPM**	**State pension only**	**No bank/ BS account**
Base: All	*(2,315)*	*(399)*	*(151)*	*(166)*	*(535)*	*(348)*	*(186)*	*(260)*	*(200)*
	%	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*
Electricity									
PPM	17	40	60	49	45	100	87	8	54
Q'ly cash/ cheque	29	30	13	26	24	0	2	43	23
DD/SO	45	13	21	9	18	0	5	28	2
Regular cash scheme	2	2	4	4	3	0	2	2	5
Budget card/plan	3	10	*	5	7	0	4	9	9
Gas									
Base:: All on mains gas	*(2,098)*	*(346)*	*(144)*	*(139)*	*(460)*	*(301)*	*(186)*	*(222)*	*(172)*
	%	%	%	%	%	%	%	%	%
PPM	11	29	40	33	30	55	100	8	41
Q'ly cash/ cheque	29	29	15	27	26	13	0	40	26
DD/SO	46	17	25	12	22	10	0	30	1
Regular cash scheme	2	6	7	8	5	5	0	3	10
Budget card/plan	5	12	6	8	9	10	0	8	11

Source: MORI

Awareness & Knowledge of Competition/Propensity to Switch

Generally speaking, 'disadvantaged' customers tend to be less knowledgeable about electricity competition (and less likely to think it easy to switch). They are, consequently, marginally less likely to have switched electricity supplier or be likely to in the future. However, since measured at the start of the year, this group is becoming increasingly knowledgeable and, in the case of low income customers (those who have a household income of less than £5k), is now three times as likely to have switched electricity supplier as in the Spring.

As we have seen in previous studies and also re-iterated here, while disadvantaged groups were less likely to switch at the start of competition, low income groups, C2DEs and benefit recipients are now more likely than 'well-off' groups to have switched **gas** supplier. PPM payers continue to lag behind in this respect, however.

Awareness & Knowledge

	All	**Social class E**	**One parent families**	**HH income under £5k**	**Receive benefits**	**Elec' PPM**	**Gas PPM**	**State pension only**	**No bank/ BS account**
Base: All	*(2,315)*	*(399)*	*(151)*	*(166)*	*(535)*	*(348)*	*(186)*	*(260)*	*(200)*
	%	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*
Aware of competition									
Electricity Mkt	95	90	85	86	91	86	84	94	86
Gas Mkt	96	92	88	92	93	90	88	92	90
Informed about competition									
Informed – electricity	68	57	58	58	58	57	48	66	49
Not informed – electricity	30	38	35	37	38	39	48	31	46
Informed – gas	69	58	58	57	60	61	50	66	51
Not informed - gas	29	37	36	39	36	35	46	31	45

Source: MORI

Propensity to Switch Supplier

	All	Social class E	One parent families	HH income under £5k	Receive benefits	Elec' PPM	Gas PPM	State pension only	No bank/ BS account
Base: All	*(2,315)* %	*(399)* %	*(151)* %	*(166)* %	*(535)* %	*(348)* %	*(186)* %	*(260)* %	*(200)* %
Switched electricity	11	10	11	7	9	3	3	14	8
Likely to switch electricity in next 12 months*	7	3	8	2	6	6	6	2	1
Switched gas supplier	25	29	24	29	30	23	14	21	27
Likely to switch gas supplier in the next 12 months*	8	3	9	2	5	6	8	3	*

* Base= non-switchers

Source: MORI

Q *How easy or difficult do you think it is to change electricity/gas supplier?*

	All	Social class E	One parent families	HH income under £5k	Receive benefits	Elec PPM	Gas PPM	State pension only	No bank/ BS account
Electricity									
Base: All non-switchers	*(1,648)* %	*(288)* %	*(108)* %	*(132)* %	*(395)* %	*(310)* %	*(162)* %	*(178)* %	*(154)* %
Easy	76	69	68	69	70	68	65	69	65
Difficult	9	10	11	14	11	13	14	7	9
Gas	(1,414) %	(224) %	(96) %	(93) %	(286) %	(214) %	(154) %	(165) %	(117) %
Easy	76	66	67	65	67	65	63	65	69
Difficult	9	11	11	14	11	13	13	10	7

Source: MORI

Contact with New Suppliers

There does not appear to be any evidence of new suppliers avoiding lower income customers or trying to discourage them from switching. These groups do, however, act more cautiously towards new suppliers and are more likely to show a lack of trust in them. As their knowledge increases and they hear positive stories from those who have switched, this may offset much of the scepticism they presently hold. Again, it seems that new suppliers may be targeting C2DEs with doorstep sales, perhaps due to the fact that they are likely to get a better response from a face-to-face approach to these groups - 71% of C2DEs have been visited by a doorstep salesperson compared to 47% of ABs.

Q In which of these ways, if any, have you had contact with the new electricity/gas suppliers in this area?

	All	**Social class E**	**One parent families**	**HH income under £5k**	**Receive benefits**	**Elec' PPM**	**Gas PPM**	**State pension only**	**No bank/ BS account**
Base: All	*(2,315)*	*(399)*	*(151)*	*(166)*	*(535)*	*(348)*	*(186)*	*(260)*	*(200)*
	%	%	%	%	%	%	%	%	%
Doorstep	62	70	71	60	71	70	69	74	70
Telesales	17	9	9	13	16	13	13	10	9
Leaflet	42	29	34	31	32	27	29	36	23
None	15	18	19	20	16	19	21	16	19

Source: MORI

Similar problems with the sales people seemed to have been experienced by 'disadvantaged' groups as other customers – too pushy, calling at inconvenient times in particular – but in the main, like other customer groups, they found the contact informative.

Q Which, if any, have you personally experienced when visited by a doorstep electricity/gas salesperson?

	All	Social class E	One parent families	HH income under £5k	Receive benefits	Elec' PPM	Gas PPM	State pension only	No bank/ BS account
Base: All who have been visited by a doorstep salesperson	*(1,525)* %	*(282)* %	*(110)* %	*(105)* %	*(380)* %	*(246)* %	*(139)* %	*(183)* %	*(141)* %
Too pushy	30	35	36	41	35	34	31	28	34
Inconvenient time	23	15	31	24	26	27	29	14	19
No written info	17	14	22	14	20	20	28	15	20
Did not tell me all relevant info	12	10	12	9	13	17	15	4	10
Info unclear	12	10	9	7	14	19	18	11	11
Tricked me into signing a contract	12	11	8	19	14	16	16	10	15
Did not tell me the truth	9	6	7	11	10	14	13	5	12

Source: MORI

Attitudes to Competition

	All	Social class E	One parent families	HH income under £5k	Receive benefits	Elec' PPM	Gas PPM	State pension only	No bank/ BS account
Base: All	*(2,315)* %	*(399)* %	*(151)* %	*(166)* %	*(535)* %	*(348)* %	*(186)* %	*(260)* %	*(200)* %
'It's better to have a choice of supplier than to be tied to one company'									
Agree	71	56	61	58	64	67	63	58	53
'If electricity/gas prices fall the standard of service will suffer'									
Agree	20	24	15	19	21	22	23	25	27
'I don't trust many of the new electricity/gas companies'									
Agree	39	44	41	40	44	45	40	47	53
'I don't feel I can get any benefits from competition in the electricity/gas markets'									
Agree	33	43	34	43	37	36	31	47	47
'I feel I broadly understand how the new electricity/gas market works'									
Agree	52	39	32	36	39	39	35	50	31

Source: MORI

What Would Make Them Change Supplier?

Like energy customers generally, 'disadvantaged' customers are mainly swayed by price in their decision to switch supplier. However, these groups are more likely than average to look for a supplier who offers suitable payment methods.

Q *If you were to change supplier, what factors would be most important to you when choosing a new electricity/gas supplier? (Spontaneous and prompted)*

	All	**Social class E**	**One parent fami-lies**	**HH income under £5k**	**Receive benefits**	**Elec' PPM**	**Gas PPM**	**State pension only**	**No bank/ BS account**
Base: All non-switchers (Elec)	*(1,648)*	*(288)*	*(108)*	*(132)*	*(395)*	*(310)*	*(162)*	*(178)*	*(154)*
Base: All non-switchers (Gas)	*(1,414)* %	(224) %	(96) %	(93) %	(286) %	(214) %	(154) %	(165) %	(117) %
Cost	75(75)*	74 (74)	79 (80)	77 (80)	75 (78)	74 (76)	74 (79)	64 (64)	71 (80)
Service	33(35)	30 (25)	33 (29)	36 (32)	31 (29)	31 (29)	34 (30)	26 (25)	27 (25)
Reliable	22(24)	15 (18)	11 (20)	17 (20)	17 (20)	16 (21)	1 (17)	16(19)	14 (23)
Payment methods	11(10)	17 (13)	24 (22)	21 (19)	18 (16)	26 (24)	29 (24)	10 (7)	24 (14)
Well known	11(11)	9 (8)	9 (13)	13 (8)	11 (11)	10 (8)	7 (6)	11 (10)	12 (11)
Ease of switch	10 (8)	6 (6)	8 (14)	6 (6)	7 (9)	5 (7)	8 (8)	4 (3)	4 (8)
Dual Fuel	5 (4)	5 (3)	3 (2)	4 (2)	5 (3)	3 (3)	3 (2)	8 (5)	4 (4)
Experience of supplier	5 (7)	2 (6)	1 (4)	4 (4)	3 (4)	3 (5)	5 (4)	4 (4)	4 (5)
Guaranteed prices	1 (11)	0 (18)	1 (11)	0 (13)	1 (13)	1 (10)	1 (11)	0 (25)	0 (12)

*Figures for gas are in brackets

Source: MORI

In addition, 'disadvantaged' customers are generally less likely than other groups to think the prices offered by the new suppliers will be lower than their current supplier. They are more likely than average to feel they just do not know what the difference would be (again, demonstrating their generally lower level of knowledge). Like other groups, though, very few think prices will be higher.

Q *How easy or difficult have you found it to compare the different prices available from the various electricity suppliers?*

	All	**Social class E**	**One parent families**	**HH income under £5k**	**Receive benefits**	**Elec' PPM**	**Gas PPM**	**State pension only**	**No bank/ BS account**
Base: All with info on prices	*(1,464)* %	*(246)* %	*(98)* %	*(98)* %	*(333)* %	*(200)* %	*(106)* %	*(146)* %	*(114)* %
Easy	47	45	47	39	46	45	38	39	43
Difficult	32	26	33	27	31	30	31	29	18

Source: MORI

Q *Do you think prices offered by the new electricity suppliers are higher or lower than those offered by your local electricity company or are they about the same?*

	All	**Social class E**	**One parent families**	**HH income under £5k**	**Receive benefits**	**Elec' PPM**	**Gas PPM**	**State pension only**	**No bank/ BS account**
Base: All	*(2,315)* %	*(399)* %	*(151)* %	*(166)* %	*(535)* %	*(348)* %	*(186)* %	*(260)* %	*(200)* %
All higher	2	2	6	1	3	3	2	1	3
All about the same	34	36	23	40	33	33	31	31	38
All lower	23	17	23	11	19	16	13	23	12
Some higher /some lower	11	9	12	8	8	8	8	5	6
Don't know	31	36	36	40	37	40	46	41	42

Source: MORI

Appendices

Statistical Reliability

Any survey which is not conducted amongst the total population, but amongst a sample drawn from the total population is open to certain sampling tolerances. The table below shows the confidence intervals for different sample sizes.

	Confidence intervals applicable to findings at or near these percentages *		
Sample size	10% or 90%	30% or 70%	50%
	±	±	±
2,500	1	2	2
2,000	1	2	2
1,500	2	2	3
1,000	2	3	3
800	3	4	4
400	3	5	5
200	4	6	7
100	6	9	10

* based on 95% confidence level

For example, for a finding that 70% of respondents (in a sample of approximately 100) give a particular answer, the chances are 95 in 100 that the 'true' results which would have been obtained by interviewing every respondent, instead of a sample of 100, falls between 61% and 79% (70% ± 9%). However, the result is proportionately more likely to be near the centre (70%) of this confidence interval than its extremes (61% or 79%).

As well as the overall sample reliability, comparisons between sub-groups of the sample also have to fulfil certain statistical requirements. The table below gives the differences required for results for sub-groups to be regarded as significantly different.

	Differences required for findings to be regarded as statistically different at or near these percentages *		
Sub-groups compared	10% or 90%	30% or 70%	50%
	±	±	±
2,000 and 1,500	2	3	3
1,500 and 1,000	2	4	4
1,000 and 1,000	3	4	4
1,000 and 800	3	4	5
1,000 and 400	4	5	6
800 and 400	4	6	6
400 and 200	5	8	9
200 and 100	7	11	12

* based on 95% confidence level

Definition of Social Class

Social Class		Occupation of Chief Income Earner
A	Upper Middle Class	Higher managerial, administrative or professional
B	Middle Class	Intermediate managerial, administrative or professional
C1	Lower Middle Class	Supervisor or clerical and junior managerial, administrative or professional
C2	Skilled Working Class	Skilled manual workers
D	Working Class	Semi and unskilled manual workers
E	Those at the lowest levels of subsistence	State pensioners, etc, with no other earnings

Phase 1 Survey – February/March 1999

Methodology

- A total of 1,212 interviews was conducted with domestic electricity customers in those areas opened up to competition by the end of December 1998. Interviews were conducted with the person wholly or jointly responsible for paying the household's electricity bill and who would make the decision to change supplier, either on their own or in consultation with another household member. The proportion of 'switchers' and customers in the E social class were boosted to allow for their separate analysis.

- To ensure that the results were representative of customers in the areas selected, the data was weighted to the known profile of households by age, social class and working status of head of household, as well as by the Mosaic life code of those Enumeration Districts (EDs) in the areas opened up to competition, and the percentage of switchers understood to be in these areas at the time of fieldwork - that is, 5%.

- All interviews were conducted face-to-face, in-home, between 6 February and 15 March 1999.

- An earlier, qualitative stage was also carried out. This consisted of four informal group discussions held between 18-21 January 1999 with domestic customers in areas opened up to competition. Two groups were held amongst the general public in Beverley and Lichfield and two were conducted among disadvantaged customers in Liverpool and Leeds. Between 8 and 10 people took part in each discussion.

Ofgas Survey – July/August 1998

Methodology

- 2,511 in-house, face-to-face interviews were conducted with household gas bill payers nationally, including 803 interviews with switchers and 691 interviews with Scottish households, both of whose numbers were boosted to allow for separate analysis. Similarly, the proportion of "lower income" Enumeration Districts in the sample was boosted so as to provide a more robust sample of lower income groups for separate analysis.

- Final data were weighted to reflect the known profile of gas customers in England and Wales, and Scotland, by work status, age, social group and switchers vs. non-switchers.

- Fieldwork was carried out by MORI Field & Tab between 11th July and 16th August 1998.

MORI /11750/5

Serial No

ELECTRICITY AND GAS COMPETITION

Topline Results Based on Data Weighted to the Profile of Great Britain
Results based on 2,315 completed interviews in England, Wales and Scotland.
Interviews were conducted face-to-face, in home, between 6th September and 13th October 1999
An asterisk (*) denotes a figures of less than 0.5% but greater than zero.
Where percentages do not sum to 100, this may be due to computer rounding, multiple responses or the exclusion of 'don't knows'.

Base: All (2,315) unless otherwise stated

Sex	(%)	
Male	45	
Female	55	(20)

Age of respondent:	(%)	
16-24	7	
25-34	29	
35-44	17	
45-54	16	
55-64	11	
65+	21	(21)
WRITE IN EXACT AGE		(22/23)

Respondent is:	(%)	
CIE	62	
Not CIE	38	(24)

Respondent is head of househol	(%)	
Yes	67	
No	32	
Not stated	1	(25)

Occupation of C.I.E.

Position/Rank/Grade

Industry/type of firm

Quals/degrees/apprenticeships

Number of staff responsible for

REMEMBER TO PROBE FULLY FOR PENSION CODE BELOW

	(%)	
AB	22	
C1	27	
C2	23	
D	12	
E	17	(26)

Sex of Head of Household	(%)	
Male	71	
Female	28	(27)

Age of Head of Household is:	(%)	
16-34	31	
35-54	34	
55+	33	(28)

Working Status of Head of Household		
Working (active)	(%)	
Working full time (30hrs+)	48	
Working part time (8-29 hrs/wk)	4	
Self employed	1	
Waiting to start a job	*	
Unemployed (registered)	4	
Unemployed (not registered but looking for work)	1	
Working student	*	
Working on a Government training scheme	0	
Other	1	(29)

Not Working (inactive)	(%)	
Long term sick/permanently ill	4	
Retired	27	
Housewife	5	
At home and not seeking work	2	
Non working student	2	
Disabled	1	
Other	0	(30)

Household is:	(%)	
Pensioner(s) only (ie no children or other adults)	21	
Adults and contains no children under 15	39	
Adults with child/ren under 15 - two parent household	31	
Adult with child/children under 15 - one parent household	8	(34)

No. in household (incl. respondent)

1	2	3	4	5	6	7	8	9+
%	%	%	%	%	%	%	%	%
(16)	(35)	(19)	(18)	(7)	(2)	(1)	(*)	(*)

No. of adults in full-time employment in household (include. respondents)

0	1	2	3	4	5	6
%	%	%	%	%	%	%
(20)	(33)	(21)	(3)	(1)	(*)	(*)

Type of housing	(%)	
Detached house	18	
Semi-detached house	37	
Terraced house	30	
Flat or maisonette	13	
Other	1	
Don't know	1	(37)

Housing tenure	(%)	
Being bought on mortgage	39	
Owned outright by household	28	
Rented from Local Authority	22	
Rented from Housing Assoc./Trust	4	
Rented from private landlord	6	
Other	1	(38)

Interviewer Declaration: I confirm that I have conducted this interview face-to-face with the above named person at the above named address and that I asked all the relevant questions and recorded the answers in full conformance with the survey specifications and within the MRS Code of Conduct.

Interviewer No: ....

Interviewer Name: ....

Signature: ....

Date of Interview: ....

Sample pt no: (31-33)

Ward: ....

SHOWCARD LL (R) **Using this card, approximately how much would you estimate your household's bill was for electricity over the last 12 months? Please include both winter and summer bills. Just read out the letter next to the category which is your best estimate.**

		(%)	
A)	Less than £100	2	
B)	£100-199	16	
C)	£200-299	28	
D)	£300-399	20	
E)	£400-499	11	
F)	£500-599	4	
G)	£600-699	2	
H)	£700-799	1	
I)	£800 or more	1	
	No idea	14	(39)

SHOWCARD LL (R) AGAIN **And, using this card, approximately how much would you estimate your household's bill was for gas over the last 12 months? Please include both winter and summer bills. Just read out the letter next to the category which is your best estimate.**

		(%)	
A)	Less than £100	3	
B)	£100-199	13	
C)	£200-299	25	
D)	£300-399	22	
E)	£400-499	11	
F)	£500-599	5	
G)	£600-699	3	
H)	£700-799	1	
I)	£800 or more	1	
	No idea	16	(40)

Household Income

SHOWCARD MM (R) **Which of the categories on this card represents your annual household income before tax? Just read out the number of the category which applies.**

		(%)	
A	Under £2,500	2	
B	£2,500 - £4,499	6	
C	£4,500 - £6,499	6	
D	£6,500 - £7,499	2	
E	£7,500 - £9,499	4	
F	£9,500 - £11,499	4	
G	£11,500 - £13,499	4	
H	£13,500 - £15,499	4	
I	£15,500 - £17,499	3	
J	£17,500 - £21,499	7	
K	£21,500 - £24,999	6	
L	. £25,000 - £29,999	6	
M	£30,000 - £39,999	8	
N	£40,000 or over	7	
	Refused	19	
	Don't know	13	(41/42)

Do you have a bank or building society account?	(%)	
Has a bank account	83	
Has a building society account	42	
Neither	9	(43)

IF HAVE BANK/BUILDING SOCIETY ACCOUNT

Do you pay any bills by direct debit?	(%)	
Yes	69	
No	25	(44)

IF NO

Would it be possible for you to pay some of your bills by direct debit through your bank/building society account if you wanted to or not?	(%)	
Yes, is possible	67	
No, not possible	20	
Don't know	12	(45)

SHOWCARD NN (R) **Which of the items on this card are you in receipt of?** MULTICODE OK

		(%)	
A	State pension	23	
B	Occupational pension	19	
C	Other pension (eg war pension)	1	
D	Extra Child Benefit for lone parents	5	
E	War Disablement pension	*	
F	Income support	9	
G	Job seeker's allowance (formerly unemployment benefit)	3	
H	Family credit	5	
I	Disability working allowance	*	
J	Disability living allowance	5	
K	Attendance allowance	1	
L	Incapacity benefit (previously sickness and/or invalidity benefit)	5	
M	Council tax benefit	14	
N	Housing benefit	13	
O	Winter fuel payments	8	
	Other benefit (WRITE IN AND CODE '4')	1	
	None of these	47	(46/47)

What type of fuel do you mainly use to heat your home?	(%)	
Coal/Solid Fuel	1	
Electricity storage radiators	2	
Other forms of electric heating	2	
Mains gas	94	
Bottled gas	*	
Oil	*	
Other	1	(48)

Location	(%)	
Town/City	70	
Village/countryside	28	(49)

Telephone service (fixed line, ie excluding mobile phones) supplied by:	(%)	
BT	79	
Other telecoms supplier	16	
No telephone	5	(50)

INTERVIEWER RECORD FROM APPEARANCE: DO NOT ASK

	(%)	
White	93	
Afro-Caribbean	2	
Asian	3	
Other	1	(51)

Good morning/afternoon/evening. I'm from MORI, the Market Research company. We're conducting interviews about electricity and gas services and would like to ask you some questions. Could I just ask ...

QA **Do you or any member of your immediate family work in the electricity or gas industry or in market research?**

	(53)		
Yes	1	CLOSE. DO NOT COUNT TO QUOTA	
No	2	ASK QB	(53)

QB **Are you the person most responsible, or are you jointly responsible with someone else, for paying the electricity and gas bills in your household?**

	(54)		
Person most responsible	1	ASK QC	
Jointly responsible	2	ASK QC	
Not responsible but someone else in the household is	3	ASK TO TALK TO THE PERSON MOST RESPONSIBLE	
Not responsible, landlord pays the electricity supplier	4	CLOSE - DO NOT COUNT TO QUOTA	
Don't know	5	CLOSE - DO NOT COUNT TO QUOTA	(54)

QC **If your household were to change, say, to a new telephone, gas or electricity supplier or insurance company, would you be the person who would make that decision, would you make it jointly with someone else, or would someone else in the household make the decision?**

	(55)		
Respondent	1	ASK QD	
Jointly	2	ASK QD	
Someone else	3	ASK TO TALK TO THIS PERSON	
Don't know	4	CLOSE - DO NOT COUNT TO QUOTA	(55)

QD **Is your household connected to mains gas or not?**

	(56)		
Yes	1	ASK Q1	
No	2	ASK Q1	(56)

Good morning/afternoon/evening. I'm from MORI, the Market Research company. We're conducting interviews about electricity and gas services and would like to ask you some questions. Could I just ask ...

AWARENESS OF COMPETITION

ASK ALL

Q1. **Were you aware that you can now buy <u>electricity</u> from suppliers other than your local <u>electricity</u> company?**

ASK ALL ON MAINS GAS - CODE 1 AT QD

Q2 **And, were you aware that you can now buy <u>gas</u> from suppliers other than British Gas?**

	Q1 Electricity (%)	Q2 Gas (%)	
Yes	95	96	
No	5	4	
Don't know	*	1	(57/58)

Q2 Base: All on mains gas (2,098)

ASK ALL

Q3 SHOWCARD A (R) **Which of these statements best fits your awareness and understanding of these changes within the domestic <u>electricity</u> market?**

Q4 SHOWCARD A (R) **AGAIN And which of these statements best fits your awareness and understanding of these changes within the domestic <u>gas</u> market?**

	Q3 Electricity (%)	Q4 Gas (%)	
Very well informed	15	15	
Fairly well informed	54	54	
Not very well informed	23	23	
Not at all informed	7	6	
No opinion	2	2	(59/60)

Q4 Base: All on mains gas (2,098)

SOURCES OF INFORMATION ABOUT COMPETITION

ASK THOSE AWARE OF COMPETITION (CODE 1) AT Q1 AND/OR Q2. OTHERS GO TO Q6

Q5. SHOWCARD B (R) **Here is a list of different ways in which you may have found out about competition in the domestic electricity and/or gas markets. Please could you tell me which ones apply to you?** MULTICODE OK

		(%)
1	Advertising/promotional leaflets & brochures from suppliers	46
2	Advertising hoardings/posters	10
3	Radio or TV advertisements	48
4	Radio or TV programmes	25
5	Caring or Advice Agency eg Age Concern, Citizen's Advice Bureau	1
6	Door-to-door salespeople	56
7	Exhibition stands in shopping centres/supermarkets	12
8	Housing Association/Local Authority/Council	1
9	Newspapers/magazines	30
10	The regulator (Offer, Ofgas, Ofgem)	3
11	Talking to relatives/friends/neighbours	15
12	Telephone call from suppliers	12
	Other (WRITE IN & CODE '1')	*
	None of these	1
	Don't know	1

(61/62)

Base: All aware of competition (2,247)

CONTACT WITH SUPPLIERS

ASK ALL
Q6. SHOWCARD C (R) **Which of these companies are you aware of selling electricity in this area?** MULTICODE OKAY
Q7. SHOWCARD C (R) AGAIN **And which of these companies currently supplies your electricity?** SINGLE CODE
ASK ALL ON MAINS GAS - CODE 1 AT QD. OTHERS GO TO Q10
Q8. SHOWCARD C (R) AGAIN **Which of these companies are you aware of selling gas in this area**? MULTICODE OKAY
Q9. SHOWCARD C (R) AGAIN **And which supplies your gas**? SINGLE CODE

	Q6 Electricity Companies (%)	**Q7 Current Electricity Supplier** (%)	**Q8 Gas Companies** (%)	**Q9 Current Gas Supplier** (%)
Beacon Gas	3	*	5	1
British Gas/Scottish Gas	43	6	86	72
Calortex	5	*	8	2
Eastern Natural Gas	3	*	7	2
Eastern Electricity	18	7	6	2
Eastern Energy	5	1	3	1
East Midlands Electricity/PowerGen	13	6	4	1
Energi	8	2	4	1
Independent Energy	1	*	*	*
London Electricity	12	8	4	2
Manweb	14	7	4	1
MEB/National Power	10	8	3	*
Midlands Gas	4	*	7	1
National Power	5	*	2	*
Northern Electric & Gas	11	5	8	2
Norweb	17	7	6	1
PowerGen	17	2	6	1
Scottish Hydro-Electric (Scottish and Southern)	5	3	1	*
Scottish Hydro-Electric Gas	3	*	3	*
ScottishPower	16	5	7	2
SEEBOARD	11	7	5	1
Southern Electric (Scottish and Southern)	10	7	4	2
SWALEC	9	5	5	1
South Western Electricity (SWEB)	8	4	1	*
Sterling Gas	2	*	3	1
Yorkshire Electricity	12	8	5	1
Other (WRITE IN & CODE '3')				
Q6	1			
Q7		*		
Q8			1	
Q9				1
Don't know	4	3	4	3

(63-74)

Q8/Q9 Base: All on mains gas (2,098)

ASK ALL
Q10. SHOWCARD D(R) **How satisfied or dissatisfied are you with the following from your present <u>electricity</u> supplier?** ALTERNATE ORDER OF ASKING AND TICK START BOXES

		Very satisfied (%)	Fairly satisfied (%)	Neither satisfied nor dissatisfied (%)	Fairly dissatisfied (%)	Very dissatisfied (%)	No opinion (%)	
❑	A Frequency of meter readings	30	46	10	6	2	6	(75)
	B Accuracy of estimated meter readings	24	48	11	6	2	9	(76)
	C Ease of contact with supplier	25	46	12	4	2	11	(77)
	D Responses to enquiries	23	40	16	3	2	17	(78)
	E Maintaining constant supply	50	42	4	1	1	2	(79)
	F Overall service	37	50	8	2	*	3	(80)
❑	G Energy Efficiency Advice	13	29	22	3	2	31	(81)

ASK ALL ON MAINS GAS - CODE 1 AT QD. OTHERS GO TO Q12
Q11. SHOWCARD D(R) AGAIN **And how satisfied or dissatisfied are you with the following from your present <u>gas</u> supplier?** ALTERNATE ORDER OF ASKING AND TICK START BOXES

		Very satisfied (%)	Fairly satisfied (%)	Neither satisfied nor dissatisfied (%)	Fairly dissatisfied (%)	Very dissatisfied (%)	No opinion (%)	
❑	A Frequency of meter readings	25	39	9	6	2	18	(82)
	B Accuracy of estimated meter readings	21	40	11	5	2	20	(83)
	C Ease of contact with supplier	24	39	10	4	3	20	(84)
	D Responses to enquiries	24	34	13	4	3	23	(85)
	E Maintaining constant supply	47	35	4	1	*	14	(86)
	F Overall service	34	42	7	2	2	14	(87)
❑	G Energy Efficiency Advice	14	28	22	3	2	31	(88)

Base: All on mains gas (2,098)

ASK ALL
Q12. SHOWCARD E (R) **In which of these ways, if any, have you had contact with the new electricity and/or gas suppliers in this area?** MULTICODE OKAY

ASK Q13 IF CODED 1-4 AT Q12 ASK Q13. OTHERS GO TO Q17
Q13. SHOWCARD E (R) AGAIN **And with which, if any, of these have you had any problems when contacted by these suppliers?** MULTICODE OKAY

	Q12 Contact (%)	Q13 Problems (%)
Visited by doorstep salesperson	62	14
Telephone sales call from supplier	17	3
You have contacted the supplier to ask for information	5	1
Leaflet through the door	42	1
Other (WRITE IN & CODE '5')		
Q12	1	
Q13		1
None of these	15	78
Don't know	1	4

(12/13)

Q13 Base: All who have had contact with new gas/electricity suppliers (1,976)

ASK ALL WHO HAVE BEEN VISITED BY A DOORSTEP SALESPERSON (CODE 1 AT Q12 AND/OR Q13). OTHERS GO TO FILTER AT Q16.
Q14. SHOWCARD F(R) **You said that you had been visited by one or more doorstep electricity and/or gas salespeople. Overall, how informative was the contact that you had with these salespeople?**

	(%)
Very informative	20
Fairly informative	41
Not very informative	18
Not at all informative	8
Don't know	13

(14)

Base: All who have been visited by a doorstep salesperson (1,525)

Q15. SHOWCARD G (R) **Can I just check which, if any, of the things on this card you have personally experienced when visited by doorstep electricity and/or gas salespeople?** JUST READ OUT THE NUMBERS THAT APPLY - MULTICODE OK

		(%)	
1	Salesman too pushy	30	
2	Salesman tried to trick me into signing a contract	12	
3	Salesman did not tell me the truth	9	
4	Salesman did not tell me all the relevant information	12	
5	Salesman did not know the answer to all the questions I had about changing supplier	6	
6	Salesman did not leave me any written information	17	
7	The information provided was unclear or confusing	12	
8	The salesman called at an inconvenient time	23	
	None of these	39	
	Don't know	3	(15)

Base: All who have been visited by a doorstep salesperson (1,525)

ASK ALL WHO HAVE HAD A TELESALES CALL FROM SUPPLIER (CODE 2 AT Q12 OR Q13). OTHERS GO TO Q17

Q16. SHOWCARD H (R) **And which, if any, of these things have you personally experienced when receiving a telesales call from an electricity and/or gas supplier?** JUST READ OUT THE NUMBERS THAT APPLY - MULTICODE OKAY

		(%)	
1	Salesman too pushy	24	
2	Salesman tried to trick me into entering a contract	6	
3	Salesman did not tell me the truth	7	
4	Salesman did not tell me all the relevant information	8	
5	Salesman did not know the answer to all the questions I had about changing supplier	5	
6	Salesman did not offer to send me any written information	6	
7	Salesman did not send me the information that I had requested	6	
8	The information provided was unclear or confusing	9	
9	The salesman called at an inconvenient time	28	
	None of these	42	
	Don't know	6	(16)

Base: All who have had a telesales call from a new supplier (372)

ASK ALL

Q17. **Approximately how many electricity and/or gas suppliers have you had information from, or discussions with, about supplying your electricity and/or gas, including your present suppliers?**

	(%)	
One	22	
Two	30	
Three	15	
Four or more	14	
None	14	
Don't know	5	(17)

Q18. **For how many electricity and/or gas companies, if any, including your current suppliers, do you have information about their prices and other payment terms?**

	(%)		
One	21	ASK Q19a	
Two	25		
Three	7		
Four or more	5		
None	36	GO TO Q20	
Don't know	6		(18)

IF CODED 1-4 AT Q18 ASK Q19a. OTHERS GO TO Q20

Q19a. SHOWCARD I (R) **How easy or difficult have you found it to compare the different prices available from the various electricity and gas suppliers?**

	(%)		
Very easy	10	GO TO Q20	
Fairly easy	38		
Fairly difficult	20	ASK Q19b	
Very difficult	12		
Don't know	21	GO TO Q20	(19)

Base: All who have price and payment terms from electricity and gas suppliers (1,464)

ASK IF CODED 3/4 (FAIRLY/VERY DIFFICULT) AT Q19a. OTHERS GO TO Q20

Q19b. **Why do you say that?** DO NOT PROMPT. PROBE FULLY. WRITE IN. MULTICODE OKAY

	(%)	
Lack of information/no information to go on	36	
Nothing to compare figures to yet	21	
Confusing/not clear	45	
None of them give you an exact price	20	
Difficult to compare like with like	28	
Always say their prices are lower	17	
Difficult to understand	19	
Other (WRITE IN & CODE '8')	2	
Don't know	1	(20)

Base: All who find it difficult to compare price and payment terms from different suppliers (416)

PRICE

ASK ALL

Q20. SHOWCARD J **Do you think the prices offered by the new electricity suppliers are higher or lower than those offered by your local electricity company, are they about the same, or are some higher and some lower?**

ASK ALL ON MAINS GAS - CODE 1 AT QD

Q21 SHOWCARD J AGAIN **And, do you think the prices offered by the new gas suppliers are higher or lower than those offered by British Gas, are they about the same, or are some higher and some lower?**

	Q20 Electricity (%)	Q21 Gas (%)	
All higher	2	2	
All about the same	34	31	
All lower	23	26	
Some higher/some lower	11	12	
Don't know	31	29	(21/22)

Q21 Base: All on mains gas (2,098)

IF ALL LOWER or SOME HIGHER/SOME LOWER AT Q20 (CODE 3 OR 4) ASK Q22. OTHERS GO TO FILTER AT Q23

Q22. **Approximately what percentage reduction in your electricity bill do you think you could get by switching from your local electricity supplier to one of the new suppliers?**

	(%)	
1-4%	3	
5-9%	10	
10-14%	25	
15-19%	6	
20-24%	7	
25-34%	3	
35+%	1	
Don't know	44	(23-26)

Base: All who believe it is possible to get lower electricity bills from switching supplier (914)

IF ALL LOWER or SOME HIGHER/SOME LOWER AT Q21 (CODE 3 OR 4) ASK Q23. OTHERS GO TO Q24

Q23. **Approximately what percentage reduction in your gas bill do you think you could get by switching from British Gas to one of the new suppliers?**

	(%)	
1-4%	4	
5-9%	9	
10-14%	23	
15-19%	7	
20-24%	8	
25-34%	5	
35+%	1	
Don't know	43	(27-30)

Base: All who believe it is possible to get lower gas bills from switching supplier (878)

SWITCHING ELECTRICITY SUPPLIER (ASK ALL)

ASK ALL

Q24. **Have you changed or signed a contract to change electricity supplier?**

	(%)		
Yes, changed or signed contract	11	= ELECTRICITY SWITCHER (GO TO Q34)	
No	89	= ELECTRICITY NON SWITCHER (ASK Q25)	
Don't know	0	GO TO FILTER AT Q41	(31)

ELECTRICITY NON-SWITCHERS SECTION (Q25-Q33 TO BE ASKED OF THOSE CODED '2' AT Q24 . OTHERS GO TO FILTER AT Q34)

Q25. **What are your main reasons for staying with your current electricity supplier**? DO NOT PROMPT. MULTICODE OKAY

IF CODED 18 AT Q25 GO TO Q29. OTHERS ASK Q26

Q26. SHOWCARD K (R) **Which of these, if any, had an influence on your decision?** JUST READ OUT THE NUMBERS THAT APPLY. MULTICODE OKAY

		Q25 Spontaneous (%)	Q26 Spontaneous & Prompted (%)	
1	Unable to change	1	1	
2	Was/am in arrears with current supplier	1	1	
3	See no reason to change/satisfied with current supplier	65	70	
4	Can't be bothered/changing is too much hassle	22	28	
5	Bad reports about other suppliers	1	4	
6	Waiting to see what happens	5	11	
7	Suspicious that lower prices will not be maintained	4	13	
8	Suspect that other suppliers will offer poorer service than current supplier	2	5	
9	Did not know I could change supplier	1	1	
10	Do not know how to change	*	1	
11	Have not been approached by another supplier	3	5	
12	Don't know enough about other suppliers	3	9	
13	Don't trust other suppliers	3	7	
14	The savings are not large enough to make it worthwhile	3	8	
15	May get locked into a contract	1	4	
16	Would have to change payment method	2	4	
17	Because they offer a wide variety of services and products, eg Home Insurance	*	*	
18	I have not made the decision to stay with my current supplier	2	3	
19	Would have to pay by Direct Debit if I changed supplier	*	1	
20	My current supplier's prices have fallen anyway	1	4	
21	Bad experience of changing gas supplier	1	1	
	Other (WRITE IN & CODE '0')			
	Q25	1		
	Q26		2	
	Don't know	4	2	(32-35)

Base: All electricity non-switchers (1,648)

IF FOUND WAS UNABLE TO SWITCH AT Q25 OR Q26 (CODE 1) ASK Q27. OTHERS GO TO Q29

Q27. **Why were you unable to change electricity supplier?** DO NOT PROMPT. MULTICODE OKAY

		(%)
1	Told that if you are in debt you can't change supplier	38
2	New supplier did not seem interested in having me	10
3	Current supplier made it difficult for me to leave	4
4	No suitable payment method offered	10
5	Had to change payment method	27
	Other (WRITE IN & CODE '6')	*
	Can't recall	7

(36)

Base: All who were unable to switch (24)

IF TOLD COULD NOT MOVE BECAUSE IN DEBT AT Q27 (CODE 1) ASK Q28. OTHERS GO TO Q29

Q28. **Who told you this?** DO NOT PROMPT. MULTICODE OKAY

	(%)
Current supplier	39
New supplier	26
Family/friends	18
Read it/heard it somewhere	
Other (WRITE IN & CODE '5')	
Can't recall	18

(37)

Base: All who could not switch supplier because of a debt (7)

ASK ALL ELECTRICITY NON-SWITCHERS

Q29. SHOWCARD L (R) **How likely are you to change your electricity supplier in the next 12 months?**

	(%)
Certain to	*
Very likely	1
Fairly likely	6
Fairly unlikely	16
Very unlikely	35
Certain not to	31
Don't know	10

(38)

Base: All electricity non-switchers (1,648)

Q30a. **If you were to change <u>electricity</u> supplier, what factors would be most important to you when choosing a new <u>electricity</u> supplier?** DO NOT PROMPT. MULTICODE OKAY

Q30b. SHOWCARD M (R) **And which 2-3 of these factors would be most important when choosing a new electricity supplier?** JUST READ OUT THE NUMBERS THAT APPLY. CODE UP TO 3 RESPONSES. MULTICODE OKAY

		Electricity Q30a Spontaneous (%)	**Electricity** Q30b Spontaneous & Prompted (%)	
1	Reduced cost of electricity	67	75	
2	Quality of service	19	33	
3	Experience of supplier in electricity supply	1	5	
4	Well known company	3	11	
5	Positive overall image of the company	1	2	
6	Reliable/trustworthy company	10	22	
7	Ability to have gas and electricity from the same company	1	5	
8	Choice of convenient payment methods	4	11	
9	Supplier offered services other than just gas or electricity, eg financial services, energy efficiency advice, etc	1	1	
10	Experience of people I know	1	4	
11	Ease of switching	4	10	
12	Special offers (eg tokens, loyalty card points, air miles)	1	3	
	Guaranteed prices/keep prices down	1	1	
	Able to keep meter	*	*	
	Other (WRITE IN & CODE '1')			
	Q30a	1		
	Q30b		1	
	Don't know	15	7	(39-42)

Base: All electricity non-switchers (1,648)

Q31. **Approximately what percentage reduction in your electricity bill, if any, would be sufficient for you to consider switching electricity supplier?** PROBE FULLY. WRITE IN.

	(%)
0%	5
1-4%	*
5-9%	3
10-14%	17
15-19%	7
20-24%	16
25-34%	12
35-44%	1
45+%	5
Anything	4
Don't know	30

(43-46)

Base: All electricity non-switchers (1,648)

Q32. SHOWCARD N (R) **How easy or difficult do you think it is to change electricity supplier?**

	(%)	
Very easy	29	GO TO Q41
Fairly easy	47	
Fairly difficult	7	ASK Q33
Very difficult	2	
No opinion	16	GO TO Q41

(47)

Base: All electricity non-switchers (1,648)

IF DIFFICULT AT Q32 ASK Q33. OTHERS GO TO Q41

Q33. **Why do you say that it is.....** (READ OUT RESPONSE AT Q32) **to change electricity supplier?** DO NOT PROMPT. MULTICODE OKAY

	(%)
Causes too much admin/paperwork	36
From what I've heard it's difficult	14
Too much hassle	55
Problems with billing	16
Do I need to have new wires?	9
Other (WRITE IN & CODE '6')	2
Don't know	7

(48)

Base: All who think it would be difficult to switch electricity supplier (133)

ELECTRICITY SWITCHERS SECTION (ASK Q34-40 OF THOSE CODED '1' AT Q24 . OTHERS GO TO FILTER AT Q41)

Q34. **What were the main reasons why you decided to change your electricity supplier?** DO NOT PROMPT. MULTICODE OKAY

Q35. SHOWCARD O (R) **And, which of these reasons, if any, influenced your decision to change your electricity supplier?** JUST READ OUT THE NUMBERS THAT APPLY - MULTICODE OKAY

		Q34 Spontaneous (%)	Q35 Spontaneous & Prompted (%)	
1	Cheaper prices	83	87	
2	Better service from new supplier	5	7	
3	Poor service from previous supplier	2	4	
4	Bad media reports about previous supplier	0	*	
5	Good media reports about new supplier	*	1	
6	Persuasive salesman	7	11	
7	Advertising by new electricity supplier	1	2	
8	Ability to buy gas and electricity from the same company	17	23	
9	Recommendations from friends/acquaintances	1	3	
10	Special offers (eg vouchers, airmiles)	2	4	
	Payment methods/only one bill	1	1	
	New/to try them	*	*	
	Other (WRITE IN & CODE 'X')			
	Q34	2		
	Q35		2	
	Don't know	2	1	(49/50)

Base: All electricity switchers (667)

Q36. SHOWCARD P (R) **How easy or difficult was it for you to leave your last electricity supplier?**

	(%)		
Very easy	60	GO TO Q38	
Fairly easy	28		
Fairly difficult	5	ASK Q37	
Very difficult	2		
Don't know	6	GO TO Q38	(51)

Base: All electricity switchers (667)

IF DIFFICULT ASK Q37. OTHERS GO TO Q38

Q37. **Why do you say that it was...... difficult to leave your last electricity supplier?** PROBE FULLY. WRITE IN.

	(%)	
Problems with billing/no bill yet	11	GO TO Q38
No problems	5	
Other	4	ASK Q37
Supplier did it all	2	
Poor communications/didn't answer letters/phone calls	33	
Had problems (unspecified)	12	
None/no answer	26	

Base: All who found it difficult to switch supplier (37)

ASK ALL ELECTRICITY SWITCHERS

Q38. **Have you changed electricity supplier more than once since competition was introduced or only the once?** IF YES **How many times?**

	(%)	
Only once	92	
Twice	7	
Three times	0	
Four times	*	
Five times plus	0	
Don't know	1	(55)

Base: All electricity switchers (667)

Q39. SHOWCARD Q (R) **How likely or unlikely are you to switch electricity supplier again in the next 12 months?**

	(%)	
Certain to	1	
Very likely	3	
Fairly likely	8	
Fairly unlikely	17	
Very unlikely	40	
Certain not to	21	
Don't know	10	(56)

Base: All electricity switchers (667)

Q40a **Did you feel misled in any way by any of the information you received from your new electricity supplier?**

	(%)		
Yes	11	GO TO Q40b	
No	85	GO TO Q41	
Don't know	4		(57)

Base: All electricity switchers (667)

IF YES AT Q40a ASK Q40b. OTHERS GO TO FILTER AT Q41

Q40b **In what way(s) were you misled?** DO NOT PROMPT. MULTICODE OKAY

	(%)	
Paying more than expected	35	
Pressurised into changing	21	
Certain things were not mentioned	29	
I thought I was signing for information only	23	
It took longer than thought to switch	6	
Still waiting for things to happen	9	
Other (WRITE IN & CODE '7')	6	
Can't recall	6	(58)

Base: All who were misled by new electricity supplier (79)

SWITCHING GAS SUPPLIER - ASK ALL ON MAINS GAS - CODE 1 AT QD. OTHERS GO TO FILTER AT Q61

ASK ALL ON MAINS GAS - CODE 1 AT QD

Q41. **Have you changed or signed a contract to change gas supplier?**

	(%)		
Yes, changed or signed contract	25	= GAS SWITCHER (GO TO Q51)	
No	75	= GAS NON SWITCHER (ASK Q42)	
Don't know	0	GO TO FILTER AT Q65	(59)

Base: All on mains gas (2,098)

GAS NON-SWITCHERS SECTION (Q42-Q50 TO BE ASKED OF THOSE CODED '2' AT Q41 . OTHERS GO TO FILTER AT Q51)

Q42. **What are your main reasons for staying with your current gas supplier**? DO NOT PROMPT. MULTICODE OKAY

IF CODED '18' AT Q42 GO TO Q46. OTHERS ASK Q43

Q43. SHOWCARD R (R) **Which of these, if any, had an influence on your decision?** JUST READ OUT NUMBERS THAT APPLY. MULTICODE OKAY

		Sponteneous Q42 (%)	Spontaneous & Prompted Q43 (%)
1	Unable to change	1	2
2	Was/am in arrears with current supplier	1	2
3	See no reason to change/satisfied with current supplier	67	73
4	Can't be bothered/changing is too much hassle	19	28
5	Bad reports about other suppliers	1	3
6	Waiting to see what happens	5	11
7	Suspicious that lower prices will not be maintained	3	11
8	Suspect that other suppliers will offer poorer service than current supplier	2	6
9	Did not know I could change supplier	*	1
10	Do not know how to change	*	1
11	Have not been approached by another supplier	3	5
12	Don't know enough about other suppliers	2	7
13	Don't trust other suppliers	2	5
14	The savings are not large enough to make it worthwhile	2	5
15	May get locked into a contract	*	2
16	Would have to change payment method	2	3
17	Because they offer a wide variety of services and products, eg Home Insurance	1	1
18	I have not made the decision to stay with my current supplier	3	4
19	Would have to pay by Direct Debit if I changed supplier	*	*
20	My current supplier's prices have fallen anyway	1	3
21	Bad experience of changing electricity supplier	*	*
	Other (WRITE IN & CODE '0')		
	Q42	1	1
	Q43		
	Don't know	4	3

(60-63)

Base: All gas non-switchers (1,414)

IF FOUND WAS UNABLE TO SWITCH AT Q42 OR Q43 (CODE 1) ASK Q44. OTHERS GO TO Q46

Q44. **Why were you unable to change gas supplier?** DO NOT PROMPT. MULTICODE OKAY

		(%)
1	Told that if you are in debt you can't change supplier	51
2	New supplier did not seem interested in having me	7
3	Current supplier made it difficult for me to leave	2
4	No suitable payment method offered	16
5	Had to change payment method	7
	Other (WRITE IN & CODE '6')	7
	Can't recall	15

(64)

Base: All who were unable to switch gas supplier (23)

IF TOLD COULD NOT MOVE BECAUSE IN DEBT AT Q44 (CODE 1) ASK Q45. OTHERS GO TO Q46

Q45. **Who told you this?** DO NOT PROMPT. MULTICODE OKAY

	(%)
Current supplier	34
New supplier	20
Family/friends	13
Read it/heard it somewhere	6
Other (WRITE IN & CODE '5')	14
Can't recall	13

(65)

Base: All who could not switch supplier because of a debt(10)

ASK ALL GAS NON-SWITCHERS - CODE 2 AT Q41

Q46. SHOWCARD S (R) **How likely are you to change your gas supplier in the next 12 months?**

	(%)
Certain to	1
Very likely	2
Fairly likely	5
Fairly unlikely	16
Very unlikely	35
Certain not to	31
Don't know	10

(66)

Base: All gas non-switchers (1,414)

Q47a. **If you were to change gas supplier, what factors would be most important to you when choosing a new gas supplier?** DO NOT PROMPT. MULTICODE OKAY

Q47b. SHOWCARD T (R) **And which 2-3 of these factors would be most important when choosing a new gas supplier?** JUST READ OUT THE NUMBERS THAT APPLY. CODE UP TO 3 RESPONSES.

		Gas Q47a Spontaneous (%)	Gas Q47b Spontaneous & Prompted (%)
1	Reduced cost of gas	68	75
2	Quality of service	24	35
3	Experience of supplier in gas supply	3	7
4	Well known company	4	11
5	Positive overall image of the company	1	2
6	Reliable/trustworthy company	11	24
7	Ability to have gas and electricity from the same company	1	4
8	Choice of convenient payment methods	4	10
9	Supplier offered services other than just gas or electricity, eg financial services, energy efficiency advice, etc	*	1
10	Experience of people I know	2	5
11	Ease of switching	3	8
12	Special offers (eg tokens, loyalty card points, air miles)	1	3
	Guaranteed prices/keep prices down	10	11
	Other (WRITE IN & CODE '1')		
	Q47a	3	3
	Q47b		
	None/wouldn't change	1	1
	Don't know	2	2

(67-70)

Base: All gas non-switchers (1,414)

Q48. **Approximately what percentage reduction in your gas bill, if any, would be sufficient for you to consider switching gas supplier?** PROBE FULLY. WRITE IN.

	(%)	
0%	4	
1-4%	*	
5-9%	2	
10-14%	17	
15-19%	8	
20-24%	16	
25-34%	12	
35-44%	1	
45+%	6	
Anything	4	
Don't know	29	(71-74)

Base: All gas non-switchers (1,414)

Q49 SHOWCARD U (R) **How easy or difficult do you think it is to change gas supplier?**
.

	(%)		
Very easy	30		
Fairly easy	46	GO TO FILTER AT Q61	
Fairly difficult	7		
Very difficult	2	ASK Q50	
No opinion	15	GO TO FILTER AT Q61	(75)

Base: All gas non-switchers (1,414)

IF DIFFICULT AT Q49 ASK Q50. OTHERS GO TO FILTER AT Q61

Q50. **Why do you say that it is.....** (READ OUT RESPONSE AT Q49) **to change gas supplier?** DO NOT PROMPT. MULTICODE OKAY

	(%)	
Causes too much admin/paperwork	29	
From what I've heard it's difficult	15	
Too much hassle	45	
Problems with billing	16	
Do I need to have new pipes?	9	
Other (WRITE IN & CODE '6')	2	
Don't know	9	(76)

Base: All who think it would be difficult to change gas supplier (117)

GAS SWITCHERS SECTION (ASK Q51-Q60 OF THOSE CODED '1' AT Q41. OTHERS GO TO FILTER AT Q61)

Q51. **What were the main reasons why you decided to change your gas supplier?** DO NOT PROMPT. MULTICODE OKAY

Q52. SHOWCARD V (R) **And, which of these reasons, if any, influenced your decision to change your gas supplier?** JUST READ OUT THE NUMBERS THAT APPLY - MULTICODE OKAY

		Q51 Spontaneous (%)	Q52 Spontaneous & Prompted (%)	
1	Cheaper prices	75	79	
2	Better service from new supplier	5	8	
3	Poor service from previous supplier	5	8	
4	Bad media reports about previous supplier	*	*	
5	Good media reports about new supplier	1	1	
6	Persuasive salesman	9	14	
7	Advertising by new gas supplier	1	5	
8	Ability to buy gas and electricity from the same company	11	19	
9	Recommendations from friends/acquaintances	3	4	
10	Special offers (eg vouchers, airmiles)	1	3	
	Other (WRITE IN & CODE 'X')			
	Q51	0		
	Q52		2	
	Don't know	6	6	(77/78)

Base: All gas switchers (684)

Q53 SHOWCARD W (R) **How easy or difficult was it for you to leave your last gas supplier?**

	(%)		
Very easy	65	GO TO Q55	
Fairly easy	21		
Fairly difficult	5	ASK Q54	
Very difficult	3		
Don't know	6	GO TO Q55	(79)

Base: All gas switchers (684)

IF DIFFICULT ASK Q54. OTHERS GO TO Q55

Q54. **Why do you say that it was...... difficult to leave your last gas supplier?** PROBE FULLY. WRITE IN.

Problems with billing/no bill yet	29	
Others	2	
None/no answer	69	
Don't know	0	()

Base: All who found it difficult to change gas supplier (51)

ASK ALL GAS SWITCHERS

Q55. **Have you changed gas supplier more than once since competition was introduced or only the once?** IF YES **How many times?**

	(%)	
Only once	76	
Twice	9	
Three times	1	
Four time	0	
Five times plus	0	
Don't know	14	(83)

Base: All gas switchers (684)

Q56. SHOWCARD X (R) **How likely or unlikely are you to switch gas supplier again in the next 12 months?**

	(%)	
Certain to	3	
Very likely	2	
Fairly likely	5	
Fairly unlikely	14	
Very unlikely	33	
Certain not to	23	
Don't know	20	(84)

Base: All gas switchers (684)

IF SWITCHED BOTH GAS AND ELECTRICITY SUPPLIERS (CODE 1 AT Q24 **AND** CODE 1 Q41) ASK Q57 OTHERS GO TO FILTER AT Q58a

Q57. **Which did you change first your gas or your electricity supplier or did you change both at the same time?**

	(%)		
Gas first	30	ASK Q58A	
Electricity first	14	ASK Q59A	
Same time	47	GO TO Q60A	
Don't know	10	GO TO Q60A	(85)

Base: All who have switched both gas and electricity supplier (295)

IF SWITCHED GAS FIRST AT Q57 OR ONLY SWITCHED THEIR GAS SUPPLIER (CODE 1 AT Q41 AND CODE 2 OR 3 AT Q24) ASK Q58A. OTHERS GO TO FILTER AT Q 59A

Q58a. SHOWCARD Y (R) **Did your experience of changing gas supplier make you more or less likely to change your electricity supplier or did it make no difference?**

	(%)		
Much more likely	20		
A little more likely	18		
No difference	58	ASK Q58B	
A little less likely	0		
Much less likely	0		
Don't know	5	GO TO Q60A	(12)

Base: All who switched gas supplier before switching electricity supplier/only switched gas supplier (86)

ASK ALL WITH AN OPINION AT Q58A. OTHERS GO TO Q60A

Q58b. **Why do you say that?** WRITE IN PROBE FULLY. WRITE IN.

	(%)		
Easy/convenient	30		
For cheaper electricity	27		
Good to have both from same company	16		
If advantages/if I thought it would be better	4		
No difference/all the same	4	ASK Q58B	
Didn't influence me/had already decided/already changed	3		
No problems/fine	2		
Happy where I am/staying with existing supplier	2		
Poor service	1		
Others	2		
Don't know/not stated	21		()

Base: All who's experience of switching gas supplier effected their decision to switch electricity supplier (81)

IF SWITCHED ELECTRICITY FIRST AT Q57 OR ONLY SWITCHED THEIR ELECTRICITY SUPPLIER (CODE 1 AT Q24 AND CODE 2 & 3 AT Q41) ASK Q59A. OTHERS GO TO FILTER AT Q60A

Q59a. SHOWCARD Y (R) AGAIN **Did your experience of changing electricity supplier make you more or less likely to change your gas supplier or did it make no difference?**

	(%)		
Much more likely	38		
A little more likely	8		
No difference	42	ASK Q59B	
A little less likely	3		
Much less likely	0		
Don't know	9	GO TO 60A	(15)

Base: All who switched electriicty supplier before switching gas supplier/only switched electricity supplier (35)

ASK ALL WITH AN OPINION AT Q59A. OTHERS GO TO Q60A

Q59b. **Why do you say that?** WRITE IN PROBE FULLY. WRITE IN.

	(%)	
Good to have both from same company	37	
For cheaper electricity	19	
Easy/convenient	12	
Didn't influence me/had already decided/already changed	10	
No difference/All the same	7	ASK Q58B
If advantages/if I thought it would be better	6	
Don't know/not stated	23	

Base: All who's experience of switching electricity supplier effected their decision to switch gas supplier (31)

ASK ALL GAS SWITCHERS

Q60a **Did you feel misled in any way by any of the information you received from your new gas supplier?**

	(%)		
Yes	18	ASK Q60b	
No	73	GO TO Q61	
Don't know	10		(19)

Base: All gas switchers (684)

IF YES AT Q60a ASK Q60b. OTHERS GO TO Q61

Q60b **In what way(s) were you misled?** DO NOT PROMPT. MULTICODE OKAY

	(%)	
Paying more than expected	32	
Pressurised into changing	20	
Certain things were not mentioned	41	
I thought I was signing for information only	17	
It took longer than thought to switch supplier	10	
Still waiting for things to happen	11	
Other (WRITE IN & CODE '7')	8	
Can't recall	5	(20)

Base: All who feel they were mislead by their new gas supplier (103)

ELECTRICITY & GAS SWITCHERS SECTION - ASK Q61-64 OF THOSE WHO HAVE SWITCHED EITHER GAS OR ELECTRICITY SUPPLIERS OR BOTH (THOSE CODED '1' AT Q24 AND/OR Q41 . OTHERS GO TO Q65)

Q61. **When you switched <u>either your gas or electricity supplier</u> did you have any problems with the final fuel bill not being based upon the meter reading taken or being inaccurate?** IF YES **Was the bill too big or too small?** MULTI-CODE OKAY

	(%)	
No problems	73	
The bill was too big	9	
No bill yet	3	
The bill was too small	1	
Other (WRITE IN AND CODE '4')	1	
Don't know	11	(21)

Base: All who have switched either gas or electricity supplier or both (1,056)

Q62 **Are your gas and electricity supplied by the same company?**

	(%)		
Yes	60	ASK Q63	
No	35		
Don't know	5	GO TO Q65	(22)

Base: All who have switched either gas or electricity supplier or both (1,056)

IF YES AT Q62 ASK Q63. OTHERS GO TO Q65

Q63 **Were you offered an additional discount as a result of this, that is, because you get both your gas and electricity from this company?**

	(%)	
Yes	41	
No	42	
Don't know	17	(23)

Base: All with dual fuel (708)

Q64 SHOWCARD Z (R) **In which of the following way do you receive your bill/s?** SINGLE CODE ONLY

	(%)	
Joint bill with gas and electricity charges combined	5	
Joint bill with gas and electricity charges given separately	13	
Separate bills for gas and electricity	70	
Don't know	12	(24)

Base: All with dual fuel (708)

METHOD OF PAYMENT - ELECTRICITY **(ASK ALL)**

Q65. SHOWCARD AA (R) **In which of these ways do you normally pay for your <u>electricity</u>? (If you have signed a contract to change supplier, which method will you use?).** SINGLE CODE

ELECTRICITY SWITCHERS ONLY (CODE 1 AT Q24). OTHERS GO TO Q67

Q66. SHOWCARD AA (R) AGAIN **And how did you pay before you changed <u>electricity</u> supplier?** SINGLE CODE

ASK ALL

Q67. SHOWCARD AA (R) AGAIN **Ideally how would you like to pay for your <u>electricity</u>?** SINGLE CODE

		Q65 Current (%)	Q66 Past (%)	Q67 Ideal (%)	
	Quarterly				
1	-Cash/cheque	29	36	26	
2	-Direct debit	11	12	12	
3	-Standing order	1	1	1	
4	-Credit card	*	*	*	
	Monthly				
5	-Cash/cheque	2	2	3	
6	-Direct debit	32	33	33	
7	-Standing order	2	2	2	
8	Credit card	*	0	*	
9	Regular weekly/fortnightly cash scheme	2	2	2	
10	Savings stamps or cards	1	1	1	
11	Fuel direct/deductions from income support	0	0	0	
12	Budget card/budget plan/pay as you go	3	2	4	
13	Prepayment meter (card, key or token)	17	5	15	
	Other (WRITE IN & CODE '2')				
	Q65	*			
	Q66		0		
	Q67			*	
	Don't know	*	4	1	(25-30)

Q66 Base: All electricity switchers (667)

IF DIFFERENT CODE AT Q65 AND Q66 ASK Q68 OTHERS GO TO FILTER AT Q69

Q68. **You say that you now pay in a different way than you did before you changed electricity suppliers. Were you required to change your method of payment by your electricity supplier or was pressure placed on you to do so although you weren't actually required to change?** SINGLE CODE

	(%)		
Required to change	14		
Pressure to change	8		
Neither	73		
Don't know	5	SKIP TO Q70	(31)

Base: All who changed payment method when they changed electricity supplier (101)

ASK ALL ELECTRICITY NON-SWITCHERS - CODE 2 AT Q24. OTHERS GO TO Q70

Q69 . **Have you changed the way you pay for electricity in the last year?** IF YES **Why did you change your payment method?** MULTICODE OKAY

	(%)	
Did not change payment method	90	
Required to change by supplier	1	
Pressure to change	*	
To take advantage of the discounts available	1	
I had trouble paying my bills using the previous method	*	
The new method is a better way of budgeting	2	
Other (WRITE IN AND CODE '7')	*	
Don't know	5	(32)

Base: All electricity non-switchers (1,648)

ASK ALL

Q70. **Why do you pay your electricity bill by. . . .** (READ OUT RESPONSE AT Q65) DO NOT PROMPT. MULTICODE OKAY

	(%)	
Easy/Convenient	76	
No bank account	1	
Best way of budgeting	26	
Dislike Direct Debit	4	
Have control over payments	14	
Pay when bill arrives	5	
Always paid in this way	13	
Pay for what I have used, when I have used it	7	
Cheaper	5	
Because I have a debt with the supplier	1	
It was already here when I moved in	2	
I had no choice	2	
Other (WRITE IN & CODE '1')	1	
Don't know	1	(33/34)

Q71. **Is paying by....... (READ OUT RESPONSE AT Q65) the cheapest method of payment offered by your electricity supplier?**

	(%)	
Yes, cheapest	45	
No, not the cheapest	20	
Don't know	35	(35)

IF NOT THE CHEAPEST AT Q71 (CODE 2) ASK Q72. OTHERS GO TO Q73

Q72. **What are your main reasons for not choosing a cheaper method of payment offered by your electricity supplier?** DO NOT PROMPT. MULTICODE OKAY

	(%)	
Easy/Convenient	45	
No bank account	2	
Best way of budgeting	24	
Dislike Direct Debit	14	
Prefer to have control over payments	20	
Pay when bill arrives	5	
Haven't got round to it	6	
Prefer to pay for what I have used, when I have used it	12	
Suits the way I prefer to pay	17	
Unable to pay by direct debit	3	
Not allowed to pay by direct debit	1	
Other (WRITE IN & CODE 'Y')	2	
Don't know	1	(36/37)

Base: All who do not pay for electricity by the cheapest method (421)

ASK ALL

Q73. SHOWCARD BB (R) **Overall, how satisfied are you with the method you use to pay for electricity?**

	(%)	
Totally satisfied	39	
Very satisfied	41	
Fairly satisfied	14	
Neither satisfied nor dissatisfied	3	
Fairly dissatisfied	1	
Very dissatisfied	*	
Totally dissatisfied	1	
Don't know	1	(38)

Q74. **Do you generally use less electricity than you really need to use or not?**

	(%)	
Yes	17	
No	75	
Don't know	8	(39)

METHOD OF PAYMENT - GAS (ASK ALL ON MAINS GAS - CODE 1 AT QD). OTHERS GO TO Q86

Q75. SHOWCARD CC (R) **In which of these ways do you normally pay for your gas? (If you have signed a contract to change supplier, which method will you use?).** SINGLE CODE

GAS SWITCHERS ONLY (CODE 1 AT Q41). OTHERS GO TO Q77
Q76. SHOWCARD CC (R) **And how did you pay before you changed gas supplier?** SINGLE CODE

ASK ALL ON MAINS GAS
Q77. SHOWCARDS CC (R) **Ideally how would you like to pay for your gas?**
SINGLE CODE

		Gas Q75 Current (%)	Gas Q76 Past (%)	Gas Q77 Ideal (%)	
	Quarterly				
1	-Cash/cheque	29	37	26	
2	-Direct debit	11	8	12	
3	-Standing order	1	1	1	
4	-Credit card	*	0	*	
	Monthly				
5	-Cash/cheque	3	3	3	
6	-Direct debit	32	27	34	
7	-Standing order	2	1	2	
8	Credit card	*	*	*	
9	Regular weekly/fortnightly cash scheme	2	1	3	
10	Savings stamps or cards	1	2	1	
11	Fuel direct/deductions from income support	*	*	*	
12	Budget card/budget plan/pay as you go	5	5	5	
13	Prepayment meter (card, key or token)	11	5	10	
	Other (WRITE IN & CODE '2')				
	Q75	*			
	Q76		*		
	Q77			*	
	Don't know	1	12	2	(40-45)

Q75/Q77 Base: All on mains gas (2,098)
Q76 Base: All gas switchers (684)

IF DIFFERENT CODE AT Q75 AND Q76 ASK Q78. OTHERS GO TO FILTER AT Q79

Q78. **You say that you now pay in a different way than you did before you changed gas suppliers. Were you required to change your method of payment by your gas supplier or was pressure placed on you to do so although you weren't actually required to change?** SINGLE CODE

	(%)		
Required to change	16		
Pressure to change	10		
Neither	65		
Don't know	9	SKIP TO Q80	(46)

Base: All who changed gas payment method when they switched supplier (118)

ASK ALL GAS NON-SWITCHERS. OTHERS GO TO Q80

Q79 . **Have you changed the way you pay for gas in the last year?** IF YES **Why did you change your payment method?** MULTICODE OK

	(%)	
Did not change payment method	86	
Required to change by supplier	1	
Pressure to change	*	
To take advantage of the discounts available	1	
I had trouble paying my bills using the previous method	*	
The new method is a better way of budgeting	2	
Other (WRITE IN & CODE '7')	1	
Don't know	9	(47)

Base: All gas non-switchers (1,414)

ASK ALL ON MAINS GAS (CODE 1 AT QD)

Q80. **Why do you pay your gas bill by. . . .** (READ OUT RESPONSE AT Q75) DO NOT PROMPT. MULTICODE OKAY

	(%)	
Easy/Convenient	75	
No bank account	1	
Best way of budgeting	25	
Dislike Direct Debit	5	
Have control over payments	13	
Pay when bill arrives	5	
Always paid in this way	12	
Pay for what I have used, when I have used it	5	
Cheaper	6	
Because I have a debt with the supplier	1	
It was already here when I moved in	2	
I had no choice	1	
Other (WRITE IN & CODE '1')	0	
Don't know	3	(48/49)

Base: All on mains gas (2,098)

Q81. **And Is paying by.........** (READ OUT RESPONSE AT Q75) **the cheapest method of payment offered by your gas supplier?**

	(%)	
Yes, cheapest	46	
No, not the cheapest	17	
Don't know	37	(50)

Base: All on mains gas (2,098)

IF NOT THE CHEAPEST AT Q81 (CODE 2) ASK Q82. OTHERS GO TO Q83

Q82. **And, what are your main reasons for not choosing a cheaper method of payment offered by your gas supplier?** DO NOT PROMPT. MULTICODE OKAY

	(%)	
Easy/Convenient	45	
No bank account	2	
Best way of budgeting	24	
Dislike Direct Debit	16	
Prefer to have control over payments	24	
Pay when bill arrives	5	
Haven't got round to it	6	
Prefer to pay for what I have used, when I have used it	10	
Suits the way I prefer to pay	13	
Unable to pay by direct debit	3	
Not allowed to pay by direct debit	2	
Other (WRITE IN & CODE 'Y')	1	
Don't know	2	(51/52)

Base: All who are not paying for their gas by the cheapest method (322)

ASK ALL ON MAINS GAS, (CODE 1 AT QD).

Q83. SHOWCARD DD (R) **And overall, how satisfied are you with the method you use to pay for gas?**

	(%)	
Totally satisfied	37	
Very satisfied	41	
Fairly satisfied	15	
Neither satisfied nor dissatisfied	3	
Fairly dissatisfied	2	
Very dissatisfied	*	
Totally dissatisfied	1	
Don't know	1	(53)

Base: All on mains gas (2,098)

Q84. **Do you generally use less gas than you really need to use or not?**

	(%)	
Yes	18	
No	72	
Don't know	9	(54)

Base: All on mains gas (2,098)

Q85. SHOWCARD EE (R) **When buying gas and electricity from the same company, which of these would you prefer?** SINGLE CODE

		(%)
A	Joint bill with gas and electricity charges combined	6
B	Joint bill with gas and electricity charges given separately	27
C	Prefer separate bills for gas and electricity	47
	Would not buy from the same company	8
	Don't know	12

(55)

Base: All on mains gas (2,098)

ASK ALL

Q86. SHOWCARD FF (R) U**sing the answers on this card, can you tell me if you agree or disagree with the following statements?** READ OUT ROTATE ORDER. TICK START

			Strongly agree (%)	Tend to agree (%)	Neither (%)	Tend to disagree (%)	Strongly disagree (%)	Don't know/no opinion (%)	Not applic-able (%)	
❑	A	It's sometimes hard to pay for the electricity/gas we use	3	15	8	26	46	1	*	(56)
	B	With my bills I frequently feel I'm 'robbing Peter to pay Paul'	4	12	10	25	46	2	1	(57)
❑	C	I would like to know more about the different ways of paying for electricity or gas	5	18	13	27	37	1	1	(58)
	D	I am often unable to pay for my electricity or gas within the time required	1	6	6	22	60	1	4	(59)
❑	E	I currently have an outstanding debt with my electricity or gas supplier which is more than 6 months old	1	2	3	12	77	2	3	(60)

ELECTRICITY PPM SECTION - ASK ALL WITH ELECTRICITY PREPAYMENT METER, ITEM 13 AT Q65. OTHERS GO TO FILTER AT Q94a

Q87a. **In the last 12 months, approximately how many times have you had to use the emergency credit on your electricity meter?**

Q87b. **And in the last 12 months, approximately how many times have you actually run out of electricity?**

	Q87a Emergency Credit (%)	Q87b Run out of electricity (%)
Once	10	12
Twice	8	8
Three times	5	2
Four times	5	1
Five to ten times	13	2
Ten to fifteen times	6	*
Fifteen to twenty times	4	*
Twenty times or more	19	1
None	20	65
Can't recall	8	8

(61/62)

Base: All electricity PPM customers (348)

IF CODED 1-8 AT Q87B ASK Q88. OTHERS GO TO Q90

Q88. SHOWCARD GG (R) **What have been the reasons for running out of electricity?** MULTICODE OKAY

		(%)
A	You did not have enough money at the time	31
B	You were waiting for a benefit payment	4
C	You were waiting for wages to be paid	1
D	You were deliberately cutting down on electricity to save money	3
E	Your nearest recharging facilities were closed and others were too far away or inconvenient	17
F	The re-charging facilities were out of order	2
G	The meter was faulty/out of order	11
H	It was more important to get the gas meter charged	0
	I forgot/didn't notice/check	38
	Other (WRITE IN & CODE '9')	6
	Don't know	0

(63)

Base: All who have run out of electricity (89)

PLEASE NOTE THAT Q89 WAS NOT ASKED DUE TO A PRINTING ERROR DURING PRODUCTION OF THE QUESTIONNAIRE

ASK ALL ELECTRICITY PPM CUSTOMERS, ITEM 13 AT Q65

Q90. **Have you been informed at any time that you could go back to a normal credit electricity meter?**

	(%)	
Yes	32	
No	60	
Don't know	8	(65)

Base: All electricity PPM customers (348)

Q91. **If the option to go back to a normal credit electricity meter was offered to you at no charge would you take it?**

IF NO/DON'T KNOW AT Q91 ASK Q92. OTHERS GO TO FILTER Q93

Q92. **And if this option meant a reduction in the price you had to pay for electricity, would you take it?**

	Q91 No charge (%)	Q92 Reduction in price (%)	
Yes	11	19	
No	74	56	
Don't know	15	25	(66/67)

Q91 Base: All electricity PPM customers (348)
Q92 Base: All who do not know or would not change to a normal credit meter at no extra charge (313)

IF YES (CODE 1) AT EITHER Q91 OR Q92 ASK Q93. OTHERS GO TO FILTER AT Q94

Q93. SHOWCARD HH (R) **How would you pay for your electricity if you did change back to a normal electricity credit meter?** SINGLE CODE ONLY

	(%)	
Quarterly Bills/standing order	9	
Monthly Direct Debit	28	
Weekly/fortnightly cash payment scheme	17	
Budget plan/budget card/more frequent cash method	19	
Fuel direct/deductions from income support	4	
Saving stamps	8	
Other (WRITE IN & CODE '7')	3	
Don't know	12	(68)

Base: All who would change to a normal credit meter (101)

GAS PPM SECTION, ASK ALL WITH A GAS PREPAYMENT METER, ITEM 13 AT Q75. OTHERS GO TO Q101

Q94a. **In the last 12 months, approximately how many times have you had to use the emergency credit on your gas meter?**

Q94b. **And in the last 12 months, approximately how many times have you actually run out of gas?**

	Q94a Emergency Credit (%)	Q94b Run out of gas (%)	
Once	5	13	
Twice	11	10	
Three times	4	1	
Four times	4	1	
Five to ten times	7	3	
Ten to fifteen times	6	1	
Fifteen to twenty times	1	1	
Twenty times or more	8	2	
None	47	60	
Can't recall	7	8	(69/70)

Base: All gas PPM customers (186)

IF CODED 1-8 AT Q94B ASK Q95. OTHERS GO TO Q97

Q95. SHOWCARD II (R) **What have been the reasons for running out of gas?** MULTICODE OKAY

		(%)	
A	You did not have enough money at the time	23	
B	You were waiting for a benefit payment	11	
C	You were waiting for wages to be paid	0	
D	You were deliberately cutting down on gas to save money	7	
E	Your nearest recharging facilities were closed and others were too far away or inconvenient	29	
F	The re-charging facilities were out of order	11	
G	The meter faulty/out of order	21	
H	It was more important to get electricity meter charged	2	
	Other (WRITE IN & CODE ‘’)	3	
	Don't know	18	(71)

Base: All who have run out of gas (49)

Q96. **And on average, how long were you without gas each time?**

	(%)	
Less than one hour	28	
One to two hours	8	
Two to five hours	16	
Five to ten hours	6	
Ten to twenty hours	9	
More than twenty hours	25	
Can't recall	7	(72)

Base: All who have run out of gas (49)

ASK ALL WITH GAS PRE-PAYMENT METER, ITEM 13 AT Q75
Q97 **Have you been informed at any time that you could go back to a normal credit gas meter?**

	(%)	
Yes	25	
No	69	
Don't know	6	(73)

Base: All gas PPM customers (186)

Q98 **If the option to go back to a normal credit gas meter was offered to you at no charge would you take it?**

Q99 IF NO/DON'T KNOW AT Q98 ASK Q99. OTHERS GO TO Q100
And if this option meant a reduction in the price you had to pay for gas, would you take it?

	Q98 No charge (%)	Q99 Reduction in price (%)
Yes	16	13
No	73	65
Don't know	11	22

Q98 Base: All gas PPM customers (186)
Q99 Base: All who do not know or would not change to a normal gas credit meter at no extra charge (141)

Q100 IF YES (CODE 1) AT EITHER Q98 OR Q99 ASK Q100. OTHER GO TO Q101
SHOWCARD JJ (R) **How would you pay for your gas if you did change back to a normal gas credit meter?** SINGLE CODE ONLY

	(%)	
Quarterly Bills/standing order	4	
Monthly Direct Debit	39	
Weekly/fortnightly cash payment scheme	19	
Budget plan/budget card/more frequent cash method	16	
Fuel direct/deductions from income support	3	
Saving stamps	10	
Other (WRITE IN & CODE '7')	4	
Don't know	5	(76)

Base: All who would change to a normal credit gas meter (38)

AWARENESS OF ASPECTS & ATTITUDES TOWARDS ELECTRICITY & GAS COMPETITION (ASK ALL)

Q101. **I am now going to read out a number of statements relating to the electricity and gas markets, some of which are true, while others are false. For each one that I read out, could you tell me whether you think the statement is true or false?** READ OUT. ROTATE ORDER TICK START

			True (%)	False (%)	Don't know (%)	
❑	A	Those in debt with their current electricity/gas supplier may not be able to change to a new supplier	49	24	27	(77)
	B	Customers need to pay their electricity/gas bill by direct debit if they want to change electricity/gas supplier	14	65	20	(78)
	C	Some companies allow you to choose the amount you wish to pay per month on a direct debit scheme	46	26	28	(79)
❑	D	I would need to pay someone to help me change electricity/gas supplier	6	83	11	(80)
	E	I changed gas supplier I would need to have new gas pipes installed	2	80	18	(81)
	F	Customers need to have new electricity cables to their homes if they want to change electricity supplier	1	80	18	(82)
❑	G	Some suppliers offer additional discounts for those who buy both their gas and electricity from them	64	6	30	(83)

Q102. SHOWCARD KK (R) **Can you please tell me whether you agree or disagree with the following statements?** READ OUT. ROTATE ORDER. TICK START

			Strongly agree (%)	Tend to agree (%)	Neither (%)	Tend to disagree (%)	Strongly disagree (%)	Don't know/no opinion (%)	
❑	A	It's better to have a choice of supplier than to be tied to one company	27	44	7	6	2	13	(84)
	B	If electricity/gas prices fall the standard of service will suffer	3	17	11	41	11	16	(85)
	C	I don't trust many of the new electricity/gas companies	11	28	20	18	4	19	(86)
	D	I don't feel I can get any benefits from competition in the electricity/gas market	7	26	12	30	9	17	(87)
❑	E	I feel I understand broadly how the new electricity/gas market works	8	44	10	16	8	14	(88)

GO TO DEMOGRAPHICS