Switching Rates for Vulnerable Customers

Summary Report

March 2007

Ipsos MORI

Switching Rates for Vulnerable Customers

As part of our work to protect the interests of vulnerable consumers Ofgem recently commissioned Mori to undertake research into the switching rates among vulnerable consumers. The results of the Mori survey are attached.

The research confirms previous Ofgem studies which show that while all customer groups are benefiting from the competitive market, switching rates among lower income groups and older people are slightly lower than for the population as a whole.

According to this latest survey 19% of gas customers and 22% of electricity customers switched their supplier in 2006. Switching was most prevalent among higher social groups. Some of the groups least likely to switch are social group E, those aged 65+ and those in rented accommodation. However even among these groups there was still a significant level of switching. For example, among those over 65 the proportion was 15% in gas and 17% in electricity.

In the Domestic Market Review published this week Ofgem has highlighted the importance we attach to helping all consumers to engage in the competitive market. In support of this aim we have been running a regional switch and save campaign aimed at pre-payment customers who can save up to £170 by switching supplier but in many cases are not aware of the savings available.

The Mori work on switching also explored the reasons why customers decided to switch or not. This highlights that as well as price, service quality is an important consideration for many customers with one in ten customers citing this as the main reason they had switched from their current supplier.

For those who had said they had not switched supplier the reasons given were predominantly that they were happy with their current supplier or "couldn't be bothered". There were very few (2%) who thought the process would be too complex or were prevented by a debt – although the latter response could be understated. Among those in rented accommodation around 10% said that their landlord would not allow it. Among PPM customer there were a small number (5%) who thought they were precluded from doing so. Over the coming year Ofgem intends to carry out more work looking at the barriers to vulnerable customers engaging effectively in the market.

As with all market research some of the findings need to be treated with caution. Some of the sample sizes for individual customer segments are quite small and so the confidence intervals around the individual figures can be quite wide. However, given that the conclusions, in terms of the different consumer groups' relative propensity to switch, are in line with previous studies we can be reasonably confident in the picture that the results paint.

The overall proportion of customers switching in 2006 in the survey is broadly consistent with data Ofgem has from the suppliers which shows 4 million customers switched supplier in 2006. However the longer term picture is more complicated. In the MORI survey 37% of gas customers and 39% of electricity customers said they had ever switched supplier.

This contrasts with our own data from which we know that BG's market share is now below 50% as are the electricity market shares for half of the electricity suppliers in their previous monopoly regions. The survey clearly understates the proportion of households that have ever switched supplier. There are a number of possible reasons for this – for example people forgetting; people moving into property where supply had already been switched; and landlords switching on behalf of the tenant. However we believe the survey is still helpful in understanding the differences between customer segments and customer attitudes to switching. These are areas we will look to explore further in the coming year.

Maxine Frerk
Director Governance, Consumer and Social Affairs

Contents

Introduction and Methodology	1
Summary	3
Incidence of switching	5
Reasons for never switching	8
Reasons for not switching in 2006	11
Reasons for switching on last occasion	13
Sample Profile	17
Topline Results	19

Introduction and Methodology

Ofgem commissioned Ipsos MORI to conduct a face-to-face survey representative of the population of Great Britain aged 15+. The objective of the research was to enable greater understanding of switching rates among the population, and vulnerable customers specifically.

The research vehicle chosen was Ipsos MORI's omnibus survey, known as the Capibus, for which the fieldwork dates were 23 February-1 March 2007, achieving 2,020 computer-assisted personal interviews

All data was collected on Ipsos MORI's weekly Omnibus.

Our Omnibus delivers a nationally and regionally representative sample of 2000 adults aged 15+ in GB (also available in France, Germany, Italy and Spain).

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

Selection of Respondents

The sample in every country employs a minimum of 80 sampling points and rising to over 225 points for the larger markets. This ensures interviewing is spread over a large geographical area rather than clustered around just a few centres.

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

Quality Control

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

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

Data Processing

All Capibus data is processed in-house by Ipsos MORI

Weighting

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

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

While the nationally representative sample comprised 2,020 interviews, the figures in this report are based on 1,243 gas customers and 1,516 electricity customers. This reflects the fact that we excluded those people who either did not have mains gas or electricity or who were not responsible (individually or jointly) for paying gas or electricity bills.

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

Summary

- The research shows that 37% of gas customers and 39% of electricity customers had ever switched their supplier up to the end of 2006. Nineteen per cent of gas customers and 22% of electricity customers switched during 2006. Switching is most prevalent among higher social groups, particularly the professional and managerial ABs. Some of the groups least likely to switch are the state-supported social group E, those aged 65+, those in rented accommodation and PPM users. PPM users are less likely to have switched either fuel than direct debit users, but electricity PPM users are more likely to switch than gas PPM users. There is some indication the pattern of switching may be changing: more recent switchers are a little more likely to be younger and to have PPMs.

- Most of those (over seven in ten) who have never switched give the main reason as "happy with current supplier", with about one in ten saying "couldn't be bothered". These are unprompted responses and more complex reasons may lie beneath these simple answers. Only small minorities mention more specific issues. Information-related issues, such as not knowing they could switch at all, belief it is a complex process and believing their meter type precludes switching are all most likely to affect vulnerable groups such as social group E and PPM customers, though they remain minor issues.

- However the small sample of previous switchers who didn't switch in 2006 are a little more likely to mention specific issues. "Happy with current supplier" and "couldn't be bothered" remain the principle answers, but 9% of electricity non-switchers and 6% of gas non-switchers cite "didn't think I could make a saving". Social groups D and E had a particular issue with the complexity of switching Fixed price deals are also more of a restriction on switching in 2006 than before, especially for the 65+ age group. All these figures have to be treated with caution due to the small sample size at this question (218 gas, 249 electricity).

- Motivations for switching on the last occasion are led by saving money – this is the main trigger for 76% of gas switchers and 71% of electricity switchers. This applies equally to vulnerable groups in the population. However secondary reasons are led by the belief that the new supplier offered better service. The other factor that is important for some people is the offer of a dual fuel package. There are few mentions of green or social tariffs as a reason for switching.

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Incidence of switching

Q4 Did you switch your gas supplier during 2006?

						Region			Housing Tenure	
	All	**Age 15-34**	**Age 35-64**	**Age 65+**	**Social Group E**	**Eng-land**	**Scot-land**	**Wales**	**Rented**	**Non-rented**
Base: All with mains gas who are responsible for the bill	*(1,243) %*	*(254) %*	*(654) %*	*(335) %*	*(351) %*	*(1,070) %*	*(118) %*	*(55) %*	*(292) %*	*(941) %*
Yes	19	23	20	15	18	19	15	31	15	21
No	81	77	80	85	82	81	85	69	85	79

Source: Ipsos MORI

Q6 Did you switch your electricity supplier during 2006?

						Region			Housing Tenure	
	All	**Age 15-34**	**Age 35-64**	**Age 65+**	**Social Group E**	**Eng-land**	**Scot-land**	**Wales**	**Rented**	**Non-rented**
Base: All with mains electricity who are responsible for the bill	*(1,516) %*	*(310) %*	*(778) %*	*(428) %*	*(351) %*	*(1,249) %*	*(171) %*	*(96) %*	*(396) %*	*(1,110) %*
Yes	22	27	23	17	15	23	18	25	17	24
No	78	73	77	83	85	77	82	75	83	76

Source: Ipsos MORI

During 2006, 19% of gas customers and 22% of electricity customers switched their supplier. Amongst gas customers, switching was more common among younger people and higher social groups. The 65+ and the state-supported social group E were least likely to switch. By region, those in Scotland were least likely to switch while those in Wales were most likely. Customers who rent their homes were less likely to switch than others. The same patterns are evident for electricity customers for switches during 2006, with most switching taking place among younger people and higher social groups. In both cases, direct debit customers show higher rates of switching than other payment methods, which may reflect a greater propensity to switch among this group, or it may reflect the advantageous deals offered for switching to direct debit, and therefore indicate the popularity of switching to this method when changing supplier.

Q4/5 Summary Table – Ever switched gas supplier (to end of 2006)

	All	Direct Debit (gas)	PPM (gas)	Age 15-34	Age 35-64	Age 65+	Social Group D	Social Group E	Region: Scot-land	Region: Wales	Housing Tenure: Rented	Housing Tenure: Non-rented
Base: All with mains gas in their home and responsible for bill	*(1,243)* %	*(741)* %	*(105)* %	*(254)* %	*(654)* %	*(335)* %	*(202)* %	*(149)* %	*(118)* %	*(55)* %	*(292)* %	*(941)* %
Yes	37	44	26	32	41	33	30	23	34	44	25	40
No	63	56	74	68	59	67	70	77	66	56	75	60

Source: Ipsos MORI

Q6/7 Summary Table – Ever switched electricity supplier (to end of 2006)

	All	Direct Debit (elec)	PPM (elec)	Age 15-34	Age 35-64	Age 65+	Social Group D	Social Group E	Scot-land	Wales	Rented	Non-rented
Base: All with mains electricity in their home and responsible for bill	*(1,516)* %	*(863)* %	*(162)* %	*(310)* %	*(778)* %	*(428)* %	*(238)* %	*(189)* %	*(171)* %	*(96)* %	*(396)* %	*(1,110)* %
Yes	39	47	33	34	42	35	31	24	33	39	25	43
No	61	53	67	66	58	65	69	76	67	61	75	57

Source: Ipsos MORI

Up to the end of 2006, 37% of gas customers and 39% of electricity customers had switched their supplier at least once. Direct debit customers are clearly most likely to have switched either fuel. PPM customers are, together with standard credit customers, less likely to have switched gas supplier. Electricity PPM customers are less likely to have switched than direct debit customers but a little more likely than electricity standard credit customers. Overall, electricity PPM customers are relatively more likely to have switched than gas PPM customers. In both cases, however, PPM customers are a little more likely to have switched in 2006 than earlier.

The younger the respondents the more likely they are to have switched during 2006; those who have **ever** switched show a different profile, suggesting that more recent switchers are younger. The middle age group (35-64) is most likely to have ever switched either fuel, with the younger and older groups both trailing equally. Switching either fuel (ever) shows a close relationship to social group, with the lowest incidence among social groups D and especially E, and the highest incidence among the professional and managerial ABs. As in the past year, switching in England is close to the national average for both fuels, but lower in Scotland and higher in Wales (though we have to be cautious about the small sample size). Housing tenure is a powerful discriminator of switching: those in rented accommodation are much less likely to have switched either fuel.

Reasons for never switching

Q8a ***What is the main reason that has caused you to remain with your current GAS supplier?*** **(SPONTANEOUS)**

					Housing Tenure	
	All (First mention)	**All (All mentions**	**PPM (gas)**	**Social Group E**	**Rented**	**Non-rented**
Base: All with mains gas who have never switched supplier	*(807)* %	*(807)* %	*(79)* %	*(118)* %	*(222)* %	*(577)* %
Happy with current supplier	71	72	76	79	67	74
Couldn't be bothered	11	16	10	7	11	16
Didn't think I could make a saving	4	5	2	2	2	6
Thought process of switching too complex	2	3	1	3	1	3
Live in rented property – landlord wouldn't allow it	3	3	8	3	12	0
Currently on a fixed price deal	2	2	2	0	1	3
Didn't know it was possible to switch	1	1	5	8	1	1
Tried to switch, but prevented by debt	*	1	0	0	0	1
Didn't think I could switch because of debt	*	*	1	1	1	*
Tried, but prevented by meter type	*	*	0	1	*	*
Termination fees of current deal too high	0	*	0	0	0	*
Other	4	5	2	3	4	5
Don't know	2	2	1	3	3	2

Source: Ipsos MORI

Q8b ***What is the main reason that has caused you to remain with your current ELECTRICITY supplier?*** **(SPONTANEOUS)**

	All (First mention)	All (All mentions)	PPM (electricity)	Social Group E	Housing Tenure: Rented	Housing Tenure: Non-rented
Base: All with mains electricity who have never switched supplier	*(956)* %	*(956)* %	*(114)* %	*(145)* %	*(304)* %	*(646)* %
Happy with current supplier	72	73	69	77	68	75
Couldn't be bothered	10	15	13	9	14	15
Didn't think I could make a saving	4	5	5	2	2	6
Live in rented accommodation and landlord won't allow me to switch	3	3	6	3	10	*
Thought process of switching too complex	2	2	2	6	1	3
Currently on a fixed price deal	2	2	2	0	1	3
Didn't know it was possible to switch supplier	1	1	1	3	1	1
Have tried to switch but prevented by a debt	*	1	1	1	1	*
Didn't think I could switch because of meter type	1	1	4	3	3	*
Didn't think I could switch because of debt	*	*	1	2	1	0
Tried to switch, but prevented by meter type	*	*	0	0	*	*
Termination fees of current deal too high	*	*	0	0	*	0
Other	3	4	2	3	2	4
Don't know	2	2	1	2	4	1

Source: Ipsos MORI

Among those who have not switched gas or electricity supplier to date, the research identifies the principal reason in both cases as the fact that they are "happy with current supplier" – this applies to 71% of gas non-switchers and 72% of electricity non-switchers. The only other frequently mentioned reason given is "can't be bothered" – given by 11% and 10% respectively. Important, though not widespread, issues are the belief that they could not make a saving, the belief the process is too complex and the effects of living in rented accommodation. There is almost no difference between the first reasons mentioned and all reasons mentioned.

Gas PPM customers are among the most likely to say they didn't know it was possible to switch, and electricity PPM customers are most likely to say they didn't think they could switch because of their meter type. It seems likely in both cases they are referring to the perceived restriction of their meter type. PPM customers are also likely to mention rented accommodation as another perceived restriction on switching. The 15-34 age group are least likely to mention they were happy with their current gas or electricity suppliers but the most likely age group to say they "can't be bothered". They are more likely to see rented accommodation as a restriction than older age groups. Customers in social group E are more likely than average to be happy with their current supplier for both fuels, but they are also more likely to say they didn't know it was possible to switch (gas) and that they thought the process of switching too complex (electricity). There are few notable differences in attitude by region, except that those in Wales are most likely to simply say they are happy with their supplier.

Customers in rented accommodation, one of the least likely groups to switch supplier, are less likely than average to say they are happy with their gas or electricity supplier. As would be expected, they are most likely to see their rented accommodation as a restriction on switching, though this is still only mentioned by 12% of gas non-switchers and 10% of electricity non-switchers.

Reasons for not switching in 2006

Q9a ***What is the main reason that has caused you to remain with your current GAS supplier <u>this past year</u>?*** **(SPONTANEOUS)**

	All (First mention)	**All (All mentions)**	**Age 65+**	**Social Groups DE**
Base: All with mains gas who have switched before 2006 but not in past year	*(207)* %	*(207)* %	*(63)* %	*(31)* %
Happy with current supplier	51	53	64	54
Couldn't be bothered	22	24	22	14
Currently on a fixed price deal	7	8	13	2
Didn't think I could make a saving	5	6	3	6
Thought the process of switching is too complex	5	5	0	13
Have recently switched, don't want to switch again so soon	3	3	3	2
Termination fees of current deal too high	0	1	0	0
Live in rented property and landlord won't allow me to switch	1	1	0	3
Didn't think I could switch because of debt	0	*	0	0
Other	5	7	8	9
Don't know	2	2	1	0

Source: Ipsos MORI

Q9b	***What is the main reason that has caused you to remain with your current ELECTRICITY supplier this past year?*** **(SPONTANEOUS)**			
	All (First mentions)	**All (All mentions)**	**Age 65+**	**Social Groups DE**
Base: All with mains electricity who have switched before 2006 but not in past year	*(240)* %	*(240)* %	*(78)* %	*(36)* %
Happy with current supplier	56	58	64	65
Couldn't be bothered	20	21	22	12
Didn't think I could make a saving	6	9	7	8
Currently on a fixed price deal	5	7	9	1
Thought process of switching too complex	3	3	1	9
Have recently switched, don't want to switch again so soon	4	4	4	2
Didn't think I could switch because of debt	*	1	0	0
Live in rented property – landlord wouldn't allow me to switch	*	*	0	0
Tried, but prevented by debt	*	*	0	0
Other	4	6	9	5
Don't know	2	2	4	8

Source: Ipsos MORI

The overall pattern of reasons for not switching either fuel in the past year is broadly the same as that for not switching ever – the principal reasons being "happy with current supplier" or "can't be bothered. A number of recent switches have clearly resulted in fixed price deals because that now becomes a reason for not switching again by 8% of gas non-switchers and 7% of electricity non-switchers. This is a little higher among the 65+ age group, particularly for gas.

A small minority (6% gas, 9% electricity) believe they could not make a (further) saving by another switch and a smaller proportion simply do not want to switch again so soon after their last switch. The experience of the previous switch may have put some off – 3% of gas non-switchers and 5% of electricity non-switchers say they thought the process of switching was too complex. This rises to 13% and 9% respectively of social group DE.

Further demographic analysis is not reliable because the sub-sample sizes fall to very low levels for this group who have switched before but not in the past year.

Reasons for switching on last occasion

Q10a /11a ***Thinking about the <u>last time</u> you switched your GAS supplier, what was the main trigger causing you to switch? And what else was important in causing you to switch GAS supplier on that occasion?***

		Other reasons for switching gas supplier							
	All (Main trigger)	**All (All men-tions)**	**PPM (Gas)**	**Age 15-34**	**Age 35-64**	**Age 65+**	**Social Group E**	**Scot-land**	**Wales**
Base: All with mains gas who have switched gas supplier up to end of 2006	*(436)* %	*(436)* %	*(26)* %	*(72)* %	*(250)* %	*(114)* %	*(31)* %	*(41)* %	*(23)* %
Believed new supplier to be cheaper/to save money	76	40	48	42	39	41	53	46	25
Believed new supplier offered better service	9	13	23	21	12	9	21	14	27
Wanted to switch to a dual fuel package	5	11	4	15	10	11	12	17	3
Wanted to switch to a fixed price deal	1	2	0	1	2	6	5	3	6
Believed new supplier displayed greater CSR	*	1	9	1	1	0	0	0	0
Wanted to switch to a "greener" tariff or supplier	*	1	0	1	1	0	0	0	0
Wanted to switch to a social offering	0	*	0	0	*	0	0	0	0
Other	7	2	4	5	2	2	4	4	0
Don't know/nothing else	2	32	30	22	34	37	18	21	39

Source: Ipsos MORI

Q10b /11b	*Thinking about the last time you switched your ELECTRICITY supplier, what was the main trigger causing you to switch? And what else was important in causing you to switch ELECTRICITY supplier on that occasion?*

		Other reasons for switching electricity supplier							
	All (Main trigger)	**All (All men-tions)**	**PPM (Elec)**	**Age 15-34**	**Age 35-64**	**Age 65+**	**Social Group E**	**Scot-land**	**Wales**
Base: All with mains electricity who have switched electricity supplier up to the end of 2006	*(560) %*	*(560) %*	*(48) %*	*(95) %*	*(310) %*	*(155) %*	*(44) %*	*(50) %*	*(26) %*
Believed new supplier to be cheaper/to save money	71	40	45	38	43	34	50	45	43
Believed new supplier offered better service	10	13	8	19	12	12	14	16	18
Wanted to switch to a dual fuel package	7	9	3	14	6	11	14	4	0
Wanted to switch to a fixed price deal	3	3	6	3	2	6	2	4	2
Believed new supplier displayed greater CSR	1	1	2	1	2	0	0	0	0
Wanted to switch to a "greener" tariff or supplier	1	*	0	1	*	0	0	3	0
Wanted to switch to a social offering	*	1	3	1	1	0	0	0	0
Other	5	3	0	2	2	6	1	2	0
Don't know	3	35	36	32	35	38	26	32	36

Source: Ipsos MORI

The belief that the new supplier is cheaper is, by far, the main trigger for all switchers, when they refer to their last switch of supplier in either gas or electricity. This dominates reasons for switching, with little variation across the demographic groups, including vulnerable groups

Other triggers, however, once the main trigger has been taken out of the equation, show the importance of secondary criteria for comparing suppliers. Superior service is most important, mentioned by 13% of both gas switchers and electricity switchers. For example, gas prepayment meter customers are a little more likely to mention service than those on other payment options. Service is also more important to social group E (for gas) and to people in Wales. By contrast, just 9% of gas switchers and 10% of electricity switchers mention service as a **main** trigger.

The other important secondary trigger is the attraction of a dual fuel package. This is most attractive to gas switchers in Scotland and to 15-34 year olds for both fuels. Electricity switchers in social group E are also keener than most on dual fuel as a reason for switching. The other factor of any significance in driving switching is the desire for a fixed price deal. This appeals to the 65+ age group and to electricity PPM customers most of all.

There are very few mentions of green or social tariffs as an attraction. Gas PPM switchers are most likely to mention a company's perceived social responsibility.

Appendices

Sample Profile

Q1	***Do you have mains gas and/or mains electricity in your home?***
	All
Base: All respondents	*(2,020)*
	%
Mains gas	81
Mains electricity	95
Neither/Don't know/Refused	3
Either	97

Source: Ipsos MORI

Q2	***Are you responsible or jointly responsible for the gas or electricity bills in your household?***
	All
Base: All with mains gas or electricity	*(1,964)*
	%
Yes	77
No	23

Source: Ipsos MORI

Q3a	***How do you pay for the gas you use?***
	All
Base: All those with mains gas who are responsible for the bill	*(1,243)*
	%
Monthly direct debit	62
Pay quarterly in arrears	23
Prepayment meter	8
Fuel Direct	*
Weekly/fortnightly payment scheme	2
Payment card/book ad hoc	3
Other	1
Don't know	1

Source: Ipsos MORI

Q3b ***How do you pay for the electricity you use?***

	All
Base: All those with mains electricity who are responsible for the bill	*(1,516)* *%*
Monthly direct debit	60
Pay quarterly in arrears	24
Prepayment meter	9
Fuel Direct	*
Weekly/fortnightly payment scheme	2
Payment card/book ad hoc	3
Other	1
Don't know	1

Source: Ipsos MORI

Demographics

	Weighted	Unweighted
	(2,020) *%*	*(2,020)* *%*
Age		
15-34	32	30
35-64	49	46
65+	20	24
Social Group		
AB	26	21
C1	29	29
C2	21	21
D	16	16
E	8	12
Region		
England	86	83
Wales	5	7
Scotland	9	10

Source: Ipsos MORI

Topline Results

OFGEM Switching Suppliers Survey – Ipsos MORI Capibus
Weighted Topline Results – 6th March 2007

- This topline shows the final weighted results for a face-to-face survey conducted among 2,020 UK residents by Ipsos MORI between 23rd February and 1st March 2007.
- Data are weighted by gender, age, social grade, region and working status.
- Where results do not sum to 100, this may be due to multiple responses, computer rounding or the exclusion of don't knows/not stated
- Results are based on all respondents unless otherwise stated
- An asterisk (*) represents a value of less than one half or one percent, but not zero

Q1 **Do you have mains gas and/or mains electricity in your home?** MULTICODE

	%
Mains gas	81
Mains electricity	95
Neither/Don't know/Refused	1

Q2 **Are you responsible or jointly responsible for the gas or electricity bills in your household?**

	%
Yes	77
No	23

Base: All those who have mains gas and/or electricity in their home (1,964)

Q3a SHOWCARD **How do you pay for the gas you use?**

	%
Monthly Direct Debit	62
Pay quarterly in arrears	23
Prepayment Meter	8
Fuel Direct (where a set amount is deducted from your benefits before you receive them)	*
Weekly/Fortnightly payment scheme	2
Payment card/book that I use whenever I choose (Ad Hoc)	3
Other	1
Don't know	1

Base: All those who have mains gas in their home and are responsible for the bill (1,243)

Q3b SHOWCARD **How do you pay for the electricity you use?**

	%
Monthly Direct Debit	60
Pay quarterly in arrears	24
Prepayment Meter	9
Fuel Direct (where a set amount is deducted from your benefits before you receive them)	*
Weekly/Fortnightly payment scheme	2
Payment card/book that I use whenever I choose (Ad Hoc)	3
Other	1
Don't know	1

Base: All those who have mains electricity in their home and are responsible for the bill (1,516)

Q4 **Did you switch your gas supplier during 2006?**

	%
Yes	19
No	81

Base: All those who have mains gas in their home and are responsible for the bill (1,243)

IF NOT SWITCHED GAS SUPPLIER DURING 2006:
Q5 **Did you switch your gas supplier before 2006?**

	%
Yes	22
No	78

Base: All those who did not switch their gas supplier during 2006 (1,014)

Q6 **Did you switch your electricity supplier during 2006?**

	%
Yes	22
No	78

Base: All those who have mains electricity in their home and are responsible for the bill (1,516)

IF NOT SWITCHED ELECTRICITY SUPPLIER DURING 2006:
Q7 **Did you switch your electricity supplier before 2006?**

	%
Yes	21
No	79

Base: All those who did not switch their electricity supplier during 2006 (1,196)

IF NEVER SWITCHED GAS SUPPLIER (No at Q5):

Q8a **What's the main reason that has caused you to remain with your current gas supplier? Any other reasons?** DO NOT PROMPT. MULTICODE OK. RECORD FIRST RESPONSE SEPARATELY.

	All mentions %	First mention %
Happy with current supplier	72	71
Didn't know it was possible to switch supplier	1	1
Have tried to switch but was prevented from doing so because of a debt	1	*
Didn't think I could switch because I have a debt	*	*
Have tried to switch but couldn't because of my meter type	*	*
Didn't think I could because of my meter type	1	*
Thought the process of switching is too complex	3	2
Can't be bothered	16	11
Didn't think I could make a saving	5	4
Currently on a fixed price deal	2	2
Termination fees of current deal are too high	*	0
Live in rented property and landlord won't allow me to switch	3	3
Other (write in)	5	4
Don't know	2	2

Base: All those who have never switched their gas supplier (807)

IF NEVER SWITCHED ELECTRICITY SUPPLIER (No at Q7):

Q8b **What's the main reason that has caused you to remain with your current electricity supplier? Any other reasons?** DO NOT PROMPT. MULTICODE OK. RECORD FIRST RESPONSE SEPARATELY.

	All mentions	First mention
	%	%
Happy with current supplier	73	72
Didn't know it was possible to switch supplier	1	1
Have tried to switch but was prevented from doing so because of a debt	1	*
Didn't think I could switch because I have a debt	*	*
Have tried to switch but couldn't because of my meter type	*	*
Didn't think I could because of my meter type	1	1
Thought the process of switching is too complex	2	2
Can't be bothered	15	10
Didn't think I could make a saving	5	4
Currently on a fixed price deal	2	2
Termination fees of current deal are too high	*	*
Live in rented property and landlord won't allow me to switch	3	3
Other (write in)	4	3
Don't know	2	2

Base: All those who have never switched their electricity supplier (956)

IF SWITCHED GAS SUPPLIER BEFORE BUT NOT DURING 2006 (Yes at Q5):

Q9a **What's the main reason that has caused you to remain with your current gas supplier this past year? Any other reasons?** DO NOT PROMPT. MULTICODE OK. RECORD FIRST RESPONSE SEPARATELY.

	All mentions %	First mention %
Happy with current supplier	**53**	**51**
Have tried to switch but was prevented from doing so because of a debt	0	0
Didn't think I could switch because I have a debt	*	0
Tried to switch but couldn't because of my meter type	0	0
Didn't think I could because of my meter type	0	0
Thought the process of switching is too complex	5	5
Can't be bothered	24	22
Didn't think I could make a saving	6	5
Currently on a fixed price deal	8	7
Termination fees of current deal are too high	1	0
Live in rented property and landlord won't allow me to switch	1	1
Have recently switched, don't want to switch again so soon	3	3
Other (write in)	7	5
Don't know	2	2

Base: All those who switched their gas supplier before 2006 (207)

IF SWITCHED ELECTRICITY SUPPLIER BEFORE BUT NOT DURING 2006 (Yes at Q7):

Q9b **What's the main reason that has caused you to remain with your current electricity supplier this past year? Any other reasons?** DO NOT PROMPT. MULTICODE OK. RECORD FIRST RESPONSE SEPARATELY.

	All mentions %	First mention %
Happy with current supplier	**58**	**56**
Have tried to switch but was prevented from doing so because of a debt	*	*
Didn't think I could switch because I have a debt	1	*
Tried to switch but couldn't because of my meter type	0	0
Didn't think I could because of my meter type	0	0
Thought the process of switching is too complex	3	3
Can't be bothered	21	20
Didn't think I could make a saving	9	6
Currently on a fixed price deal	7	5
Termination fees of current deal are too high	0	0
Live in rented property and landlord won't allow me to switch	*	*
Have recently switched, don't want to switch again so soon	4	4
Other (write in)	6	4
Don't know	2	2

Base: All those who switched their electricity supplier before 2006 (240)

ASK ALL GAS SWITCHERS (EVER) (Yes at Q4 or Q5):

Q10a **Thinking about the <u>last time</u> you switched your gas supplier, what was the main trigger causing you to switch?** (CODE **ONE** OPTION PER COLUMN SEPARATELY. DO NOT PROMPT.)

Q11a **And what else was important in causing you to switch gas supplier on that occasion?** (DO NOT PROMPT. MULTICODE OK)

	Q10a %	Q11a %
Believed new supplier to be cheaper/to save money	**76**	**40**
Believed new supplier offered better service	9	13
Believed new supplier displayed greater corporate responsibility	*	1
Wanted to switch to a dual fuel package	5	11
Wanted to switch to a fixed-price deal	1	2
Wanted to switch to a social offering	0	*
Wanted to switch to a "greener", environmentally friendly tariff or supplier	*	1
Other	7	2
Don't know/Nothing else	2	32

Base: All those who have ever switched their mains gas supplier (436)

ASK ALL ELECTRICITY SWITCHERS (EVER) (Yes at Q6 or Q7):

Q10b **Thinking about the <u>last time</u> you switched your electricity supplier, what was the main trigger causing you to switch?** (CODE **ONE** OPTION PER COLUMN SEPARATELY. DO NOT PROMPT.)

Q11b **And what else was important in causing you to switch electricity supplier on that occasion?** (DO NOT PROMPT. MULTICODE OK)

	Q10b %	Q11b %
Believed new supplier to be cheaper/to save money	**71**	**40**
Believed new supplier offered better service	10	13
Believed new supplier displayed greater corporate responsibility	1	1
Wanted to switch to a dual fuel package	7	9
Wanted to switch to a fixed-price deal	3	3
Wanted to switch to a social offering	*	1
Wanted to switch to a "greener", environmentally friendly tariff or supplier	1	*
Other	5	3
Don't know/Nothing else	3	35

Base: All those who have ever switched their mains electricity supplier (560)