# Switching Rates for Vulnerable Customers

Summary Report
March 2008

## Switching Rates for Vulnerable Customers

As part of its Consumer First initiative and our work to protect the interests of vulnerable consumers Ofgem recently commissioned Ipsos MORI to undertake some quantitative research into switching rates and behaviour. This follows a similar study last year into switching rates to allow us to track changes. The results of the latest Ipsos MORI survey are attached.

According to this latest survey 20% of gas customers and 19% of electricity customers switched their supplier in 2007 with significant levels of switching amongst all groups. 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. Ofgem has also recently commissioned some qualitative work with vulnerable consumers to explore the barriers to vulnerable customers engaging effectively in the market. This report is available on our website.

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. In particular the observed increases in switching rates amongst those customers in social class E are based on relatively small sample sizes and may not be robust. However given the increases we are seeing in switching rates amongst PPM customers it is not unreasonable to assume that this would lead to an increase in switching in social class E where PPM usage is relatively high.

The overall proportion of customers switching in 2007 in the survey is broadly consistent with data Ofgem has from the suppliers which shows 5 million customers switched supplier in 2007. However the longer term picture is more complicated. In the Ipsos MORI survey 43% of gas customers and 40% of electricity customers said they had ever switched supplier. Whilst this has increased since last year the figures are lower than we would expect, being inconsistent with other sources of data. For example we know that British Gas's market of the gas market is now below 50% as are the electricity market shares for half of the electricity suppliers in their previous monopoly regions. As you would expect the survey understates the proportion of households that have ever switched supplier. There are a number of possible reasons for this – for example people forgetting; people being jointly responsible for the bill and the other person having made the switch; people moving into property where supply had already been switched; and landlords switching on behalf of the tenant. However whilst 'ever switched' rates are underestimates across all customer groups the survey is still helpful in understanding the differences between customer segments and customer attitudes to switching. These are areas we will continue to explore further in the coming year.

**Maxine Frerk**
Director Governance, Consumer and Social Affairs

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# 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. Where possible, this report includes year-on-year comparisons with the previous survey in March 2007, though there are many additional questions asked this year.

The research vehicle chosen was Ipsos MORI's omnibus survey, known as the Capibus, for which the fieldwork dates were 29 February-6 March 2008, achieving 2,063 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 2,063 interviews, most of the figures in this report are based on 1,256 gas customers and 1,519 electricity customers. This reflects the fact that we excluded from detailed questioning those people who either did not have mains gas or electricity or who were not responsible (individually or jointly) for paying gas or electricity bills.

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

# Summary

- The research this year shows that 20% of gas customers and 19% of electricity customers switched supplier during 2007. This represents no difference in the rate of switching for gas, but a slight fall in the rate for electricity. There is great consistency in switching incidence across social groups, with indications that some “vulnerable” groups are increasing their level of switching relative to other groups, however, small sample sizes do not permit us to be conclusive for all groups affected. One where significant growth in gas switching is most likely is among those in rented accommodation; their incidence is now no lower than those in other accommodation. Some sections of the population continue to lag behind, such as the 65+, those in Wales (though, again, sample size is an issue) and those with no internet access. The pattern for recent electricity switchers is similar, though the professional/managerial AB social group is more dominant compared to the C1 group. For both gas and electricity customers, it is now standard credit customers who lag behind those on direct debit or PPM.

- There is less change in the profile of those who have *ever* switched either fuel, though the penetration of switchers is increased to 43% for gas and 40% for electricity. This represents a significant six-point rise for gas, but no real change for electricity. The profile remains skewed towards direct debit customers, the middle aged (35-64), those in non-rented accommodation and the AB social group.

- The incidence of multiple switchers has now reached almost half of those who have ever switched– just 53% of gas switchers and 55% of electricity switchers have only ever switched once. Those who have ever switched four or more times has reached almost one in ten (9%) for both fuels.

- The incidence of switching tariffs in 2007 among those who did not switch supplier is fairly low – 9% for gas; 8% for electricity.

- Knowledge of the possibility of switching domestic energy supplier is now widespread – 80% of those who have never switched either fuel are aware of it – though those who have no knowledge are likely to be concentrated in some of the more vulnerable groups: the young, the unskilled and those who rent their homes. They are also likely to be in England, rather than Scotland or Wales. Most of the non-switchers claim to be happy with their current supplier(s). A number also feel unconvinced about the benefits of switching supplier, for example that “all suppliers are pretty much the same” or “I don’t think I’d save enough to make switching worthwhile” or “I’m already on a good deal”. Around one in six (16%) believe “switching would be too much hassle” and 5% would not trust a different supplier.

- Motivations for switching on the last occasion continue to be led by saving money – this is the main trigger for 78% of gas switchers and 77% of electricity switchers. The precedence of saving money applies equally to vulnerable groups in the population. Better service continues to be an important, but very much secondary, concern, though it is notably important to social group E gas customers, and C2 electricity customers. Dual fuel packages and fixed price deals are significant, but minor factors. There are few mentions of online or social tariffs as a reason for switching, though green tariffs have a few adherents, mostly among the younger age group.

- Doorknocking is the primary method by which both electricity and gas switching has been facilitated – well ahead of online switching, the second most frequent method. Many switchers from vulnerable groups have switched because of a doorknocking approach – PPM customers, social groups D and E and those in rented accommodation. Online switching is, along with internet access, weighted towards the AB and C1 social groups. Very few with no internet access of their own used this method. There is also notably little use of online switching in Scotland, where doorknocking prevails. Telephone sales contact is less prevalent, and very few customers have made their own direct contact with suppliers, perhaps prompted by advertising; mostly ABs and older people.

- Just under two-thirds of either gas or electricity switchers who switched to save money perceive they are, indeed, paying less as a result of their switch. This means significant proportions (20% for gas; 24% for electricity) think they are not. Also, about one in six do not know. Some vulnerable groups, such as social group E and those in rented accommodation are less likely than others to feel their switch has been successful. Among those who have switched to save money and agree that they are now paying less it is clear that the extent of perceived savings is variable and, for some, unpredictable. On balance, this is not a problem since more customers have saved more than expected, rather than less than expected. But only about half of either gas or electricity customers were accurate in their predictions of savings, and social group E is least likely to say they have saved the amount expected. Furthermore, group E, along with group D and those in rented accommodation, is most likely to believe they have saved <u>less</u> than expected.



*Checked & Approved:* *Robert Knight*

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###

# Incidence of switching

**Q5** ***Did you switch your gas supplier during 2007?***

| | | | | | | Region | | | Housing Tenure | | All |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | **All** | **Age 15-34** | **Age 35-64** | **Age 65+** | **Social Group E** | **Eng-land** | **Scot-land** | **Wales** | **Rented** | **Non-rented** | **2007** |
| *Base: All with mains gas who are responsible for the bill* | *(1,256)* % | *(235)* % | *(657)* % | *(364)* % | *(157)* % | *(1,061)* % | *(133)* % | *(62)* % | *(386)* % | *(865)* % | *(1,243)* % |
| Yes | 20 | 25 | 20 | 15 | 21 | 21 | 16 | 10 | 20 | 20 | 19 |
| No | 80 | 75 | 80 | 85 | 79 | 79 | 84 | 90 | 80 | 80 | 81 |

Source: Ipsos MORI

**Q10** ***Did you switch your electricity supplier during 2007?***

| | | | | | | Region | | | Housing Tenure | | All |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | **All** | **Age 15-34** | **Age 35-64** | **Age 65+** | **Social Group E** | **Eng-land** | **Scot-land** | **Wales** | **Rented** | **Non-rented** | **2007** |
| *Base: All with mains electricity who are responsible for the bill* | *(1,519)* % | *(289)* % | *(789)* % | *(441)* % | *(195)* % | *(1,239)* % | *(179)* % | *(101)* % | *(496)* % | *(1,017)* % | *(1,516)* % |
| Yes | 19 | 22 | 20 | 16 | 20 | 20 | 15 | 14 | 19 | 20 | 22 |
| No | 81 | 78 | 80 | 84 | 80 | 80 | 85 | 86 | 81 | 80 | 78 |

Source: Ipsos MORI

During 2007, 20% of gas customers and 19% of electricity customers switched their supplier. While the level of gas switching is not significantly different to 2006, there is a slight fall in the incidence of electricity switching.

Younger people and people in England are again most likely to have switched gas supplier; the 65+ and those in Wales least so (though our sample in Wales is very small). There are indications that the difference between social group E (state supported) and the professional and managerial ABs has disappeared since last year, though the small sub-sample sizes for these groups make the finding inconclusive. While direct debit gas customers continue to be more likely switchers than those on standard credit, they have been matched by a higher level of switching among PPM customers. The significantly lower level of gas switching among those in rented accommodation identified last year has also disappeared.

For electricity customers the pattern remains fairly similar to gas; more 2007 switching has been among younger people and those in England. In electricity switching, there now seems to be little variation between social groups; the AB social group is more likely to switch than the C1 group, but other differences are not statistically significant. There are indications that the state supported group E has increased its incidence of switching electricity supplier since last year, but again the small number of interviews makes it inconclusive. Among electricity direct debit customers the incidence of switching has fallen in 2007, and it is now roughly level with PPM customers, though still well ahead of standard credit customers. As in the case of gas switching, the significantly lower incidence of electricity switching among those in rented accommodation that was identified in the previous survey no longer applies: there is now no difference by type of accommodation.

For both gas and electricity customers there is some indication of differences in the incidence of switching in 2007 by ethnic group; whites are more likely to have switched than those from black and minority ethnic communities (BME)s. However the BME sample is very small and it is difficult to be conclusive. It is also likely that this catch-all BME category obscures even deeper variations by specific ethnic category, the incidence of which are too small to discern in such a national sample.

The availability of internet access is also closely associated with switching – those with access are much more likely to have switched either fuel.

The vast majority of both gas and electricity switchers in 2007 switched only once during the year (87% and 82% respectively); just 2% switched each three times or more. There are indications of multiple switching being more prevalent among PPM customers but sample sizes are not conclusive.

**Q5/7 Summary Table – Ever switched gas supplier (to end of 2007)**

| | 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 | All 2007 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| *Base: All with mains gas in their home and responsible for bill* | *(1,256) %* | *(793) %* | *(142) %* | *(235) %* | *(657) %* | *(364) %* | *(220) %* | *(157) %* | *(133) %* | *(62) %* | *(386) %* | *(865) %* | *(1,243) %* |
| Yes | 43 | 47 | 35 | 34 | 47 | 41 | 36 | 38 | 46 | 41 | 33 | 47 | 37 |
| No | 57 | 53 | 65 | 66 | 53 | 59 | 64 | 62 | 54 | 59 | 67 | 53 | 63 |

Source: Ipsos MORI

**Q10/12 Summary Table – Ever switched electricity supplier (to end of 2007)**

| | 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 | All 2007 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| *Base: All with mains electricity in their home and responsible for bill* | *(1,519) %* | *(935) %* | *(199) %* | *(289) %* | *(789) %* | *(441) %* | *(260) %* | *(195) %* | *(179) %* | *(101) %* | *(496) %* | *(1,017) %* | *(1,516) %* |
| Yes | 40 | 45 | 34 | 30 | 45 | 39 | 35 | 38 | 34 | 38 | 31 | 44 | 39 |
| No | 60 | 55 | 66 | 70 | 55 | 61 | 65 | 62 | 66 | 62 | 69 | 56 | 61 |

Source: Ipsos MORI

The overall incidence of switching up to the end of 2007 ie *ever switched supplier* is 43% for gas and 40% for electricity. This represents a six-point increase over the past year for gas, but no significant difference for electricity. The pattern by sub-groups is similar to that observed in the previous survey, in 2007. Direct debit customers are most likely to have switched; PPM and standard credit customers less likely. The middle age group (35-64) is most likely to have switched either fuel, as is the AB social group, with the unskilled manual group (D) lagging behind, and the state supported group (E) also showing indications of trailing, though not as significantly in electricity. While those in rented accommodation now show higher incidences of switching either fuel than a year ago, they remain lower than those in other accommodation. By region, switching of gas is substantially up in Scotland and a little down in Wales. Electricity switching is unchanged by region. There is a close association between switchers of either fuel and those who are now on a dual fuel contract.

As with switching in the last year, there is an indication that whites have a greater incidence of switching than BMEs, though the BME sample size is very small. Internet access is also closely associated with switching – those with internet access are much more likely to have ever switched.

Among those who have ever switched, the incidence of multiple switchers has now reached almost half – just 53% of gas switchers and 55% of electricity switchers have only ever switched once. Those who have ever switched four or more times has reached almost one in ten (9%) for both fuels.

# Switching tariffs

| **Q9** | ***Even though you stayed with the same gas supplier during 2007, did you change the tariff you have with them or the method by which you pay them?*** | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | **All** | **Direct Debit (gas)** | **PPM (gas)** | **Internet Access** | | **Region** | | |
| | | | | **Yes** | **No** | **England** | **Scotland** | **Wales** |
| *Base: All who did not switch gas supplier in 2007* | *(1,012)* % | *(632)* % | *(110)* % | *(629)* % | *(383)* % | *(844)* % | *(113)* % | *(55)* % |
| Yes | 9 | 11 | 6 | 10 | 6 | 9 | 1 | 14 |
| No | 88 | 86 | 88 | 87 | 90 | 87 | 95 | 80 |
| Don't know | 4 | 3 | 6 | 3 | 5 | 3 | 4 | 6 |

Source: Ipsos MORI

| **Q14** | ***Even though you stayed with the same electricity supplier during 2007, did you change the tariff you have with them or the method by which you pay them?*** | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | **All** | **Direct Debit (elec)** | **PPM (elec)** | **Internet Access** | | **Region** | | |
| | | | | **Yes** | **No** | **England** | **Scotland** | **Wales** |
| *Base: All who did not switch electricity supplier in 2007* | *(1,227)* % | *(743)* % | *(158)* % | *(758)* % | *(469)* % | *(988)* % | *(152)* % | *(87)* % |
| Yes | 8 | 10 | 7 | 9 | 5 | 8 | 3 | 13 |
| No | 89 | 86 | 90 | 87 | 91 | 88 | 95 | 83 |
| Don't know | 4 | 4 | 4 | 4 | 4 | 4 | 2 | 3 |

Source: Ipsos MORI

Among those who did not switch supplier in 2007, the incidence of switching tariffs is fairly low – 9% for gas; 8% for electricity. It is notable that those now paying by direct debit are more likely to have switched tariff, while those now paying by PPM are less likely. Standard credit payers are least likely of all, among electricity customers. Those with internet access are more likely to have switched tariff, as are those in England compared to Scotland. However those in Wales are most likely of all to have switched tariff in either gas or electricity. With the small sample size in Wales it is difficult to be conclusive about this.

# Knowledge and Preconceptions about Switching

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

| | All | Age | | | Social Class | | Housing Tenure | |
|---|---|---|---|---|---|---|---|---|
| | | 15-34 | 35-64 | 65+ | AB | D | Rented | Non-rented |
| *Base: All with gas or electricity, responsible for bills and never switched either* | *(844)* % | *(188)* % | *(410)* % | *(246)* % | *(151)* % | *(158)* % | *(321)* % | *(518)* % |
| Yes | 80 | 72 | 82 | 83 | 85 | 76 | 72 | 85 |
| No | 16 | 21 | 14 | 13 | 12 | 21 | 21 | 13 |
| Not sure | 4 | 6 | 3 | 3 | 4 | 3 | 6 | 3 |

Source: Ipsos MORI

Among those who have never switched either energy supplier, eight in ten know it is possible to do so. Those with no knowledge of switching are likely to be from the youngest age group (15-34) social class D (unskilled), from England rather than Scotland or Wales, and in rented accommodation. The BME ethnic groups are least likely of all to know about the possibility of switching supplier, though again we have too few interviews to be conclusive.

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

| | All | England | Scotland | Wales | Ethnic | |
|---|---|---|---|---|---|---|
| | | | | | White | BME |
| *Base: All with gas or electricity, responsible for bills and never switched either* | *(844)* % | *(681)* % | *(104)* % | *(59)* % | *(763)* % | *(80)** % |
| Yes | 80 | 77 | 97 | 90 | 82 | 68 |
| No | 16 | 18 | 3 | 7 | 14 | 28 |
| Not sure | 4 | 5 | 0 | 3 | 4 | 5 |

Source: Ipsos MORI

* Very small sample size

| **Q16** | *For each of the items on this card could you please say which of them apply to you?* | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | **All** | **Age** | | | **Social Class** | | **England** | **Housing Tenure** | |
| | | **15-34** | **35-64** | **65+** | **AB** | **D** | | **Rented** | **Non-rented** |
| *Base: All with gas or electricity, responsible for bills and never switched either* | *(844) %* | *(188) %* | *(410) %* | *(246) %* | *(151) %* | *(158) %* | *(681) %* | *(321) %* | *(518) %* |
| I'm happy with my current supplier(s) | 72 | 64 | 70 | 83 | 70 | 77 | 72 | 66 | 75 |
| I think switching would be too much hassle | 16 | 13 | 17 | 19 | 21 | 14 | 17 | 13 | 19 |
| All the suppliers are pretty much the same so there is no point in switching | 12 | 10 | 15 | 11 | 11 | 13 | 12 | 12 | 13 |
| Although I haven't checked prices of other suppliers, I don't think I'd save enough to make switching worthwhile | 10 | 5 | 13 | 8 | 15 | 7 | 9 | 5 | 12 |
| I've checked prices of other suppliers and I am already on a good deal | 9 | 8 | 10 | 7 | 10 | 4 | 9 | 6 | 10 |
| I've checked prices of other suppliers and don't think I'd save enough to make switching worthwhile | 8 | 6 | 9 | 7 | 15 | 7 | 9 | 5 | 12 |
| I wouldn't trust a different supplier | 5 | 4 | 6 | 4 | 5 | 5 | 5 | 5 | 5 |
| I live in a rented house and don't think my landlord would allow me to switch | 3 | 1 | * | 0 | 2 | 2 | 3 | 9 | 0 |
| I wouldn't know how to go about switching even if I wanted to | 1 | 2 | 1 | 2 | 1 | 1 | 1 | 1 | 1 |
| I am in debt with current supplier(s) so don't think I'd be able to switch | * | 1 | * | 0 | 0 | 1 | 1 | 1 | 0 |
| None of these | 4 | 3 | 5 | 2 | 5 | 4 | 4 | 4 | 3 |

Source: Ipsos MORI

For most non-switchers, the commonest explanation is that they are happy with their current supplier – ie. they see no reason to consider switching (72%). This is particularly likely to be the case among the 65+ and social group Ds. Just under one in ten (8%) have gone so far as to check prices and believe they could not save enough to make it worthwhile, though a further 9% believe this shows them to be already on a good deal. In some cases more information on the competitive market and the varying prices might challenge preconceptions, for example among the 12% who think companies are all the same, the 10% who have not even checked other prices and the one percent who would not know how to go about it.

Perhaps most difficult to persuade to switch are the 5% who say they simply would not trust a different supplier. The 16% who believe switching is too much hassle could also be tricky to persuade, particularly if their beliefs are based on any kind of evidence. This may also be related to the relative importance of energy to them financially – ABs are the most likely social group to give this reply, and energy is likely to be the lowest proportion for them of their disposable income.

# Reasons for switching on last occasion

**Q17/18** ***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 | | | | | | | | 2007 | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | **All (Main trigger)** | **All (All mentions)** | **PPM (Gas)** | **Age 15-34** | **Age 35-64** | **Age 65+** | **Social Group E** | **Scot-land** | **Wales** | **Main trigger** | **All mentions** |
| *Base: All with mains gas who have switched gas supplier up to end of 2007* | *(536)* % | *(536)* % | *(49)* % | *(80)* % | *(305)* % | *(151)* % | *(67)* % | *(60)* % | *(26)* % | *(436)* % | *(436)* % |
| Believed new supplier to be cheaper/to save money | 78 | 84 | 82 | 85 | 85 | 79 | 85 | 87 | 94 | 76 | 83 |
| Believed new supplier offered better service | 6 | 19 | 17 | 17 | 20 | 17 | 25 | 16 | 17 | 9 | 20 |
| Wanted to switch to a dual fuel package | 3 | 6 | 9 | 3 | 7 | 8 | 3 | 1 | 0 | 5 | 16 |
| Wanted to switch to a fixed price deal | 2 | 3 | 10 | 0 | 4 | 3 | 2 | 5 | 2 | 1 | 3 |
| Believed new supplier displayed greater CSR | 1 | 1 | 0 | 0 | 2 | 1 | 0 | 0 | 0 | * | 1 |
| Wanted to switch to a "greener" tariff or supplier | 1 | 2 | 1 | 6 | 2 | * | 3 | 1 | 0 | * | 1 |
| Wanted to switch to a social offering | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | * |
| The attraction of an online tariff | 0 | 1 | 0 | 1 | 2 | 2 | 0 | 2 | 2 | - | - |
| Other | 7 | 11 | 16 | 13 | 9 | 12 | 11 | 3 | 0 | 7 | 8 |

Source: Ipsos MORI

**Q21/22** ***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?***

| | All (Main trigger) | Other reasons for switching electricity supplier | | | | | | | | 2007 | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | All (All mentions) | PPM (Elec) | Age 15-34 | Age 35-64 | Age 65+ | Social Group E | Scot-land | Wales | Main trigger | All mentions |
| *Base: All with mains electricity who have switched electricity supplier up to the end of 2007* | *(611)* % | *(611)* % | *(71)* % | *(90)* % | *(342)* % | *(179)* % | *(80)* % | *(62)* % | *(37)* % | *(560)* % | *(560)* % |
| Believed new supplier to be cheaper/to save money | 77 | 85 | 82 | 81 | 87 | 82 | 82 | 92 | 88 | 71 | 79 |
| Believed new supplier offered better service | 6 | 21 | 17 | 19 | 22 | 19 | 26 | 22 | 18 | 10 | 20 |
| Wanted to switch to a dual fuel package | 4 | 8 | 9 | 8 | 7 | 12 | 11 | 5 | 0 | 7 | 15 |
| Wanted to switch to a fixed price deal | 2 | 5 | 8 | 1 | 5 | 5 | 2 | 7 | 1 | 3 | 5 |
| Believed new supplier displayed greater CSR | 1 | 1 | 3 | 3 | 1 | 1 | 2 | 1 | 0 | 1 | 2 |
| Wanted to switch to a "greener" tariff or supplier | 2 | 3 | 1 | 8 | 3 | * | 1 | 0 | 11 | 1 | 2 |
| Wanted to switch to a social offering | * | * | 1 | 0 | 0 | * | 0 | 0 | 0 | * | 1 |
| The attraction of an online tariff | 0 | 1 | 2 | 0 | * | 2 | 0 | 0 | 0 | - | - |
| Other | 6 | 9 | 6 | 12 | 7 | 10 | 10 | 1 | 4 | 5 | 7 |

Source: Ipsos MORI

The prospect of saving money continues to dominate the reasons why people have switched supplier, and is most particularly the key reason they describe as their "main trigger". The overall pattern of reasons given is closely consistent between gas and electricity switchers and very similar to those obtained last year. Those on direct debit are most likely to say they believed the new supplier to be cheaper, particularly for electricity – a fact perhaps more easily verified when on a fixed direct debit.

Subsidiary reasons for switching are led by better service, though it remains a main trigger for very few – in fact even fewer than last year. Service is especially mentioned by social group E (for gas) and social group C2 (for electricity). The desire to switch to a dual fuel package was also a driver for switching behaviour for some - 6% of gas customers and 8% of electricity customers – though perhaps surprisingly for only 7% of those now on a dual fuel contract. The specific attractions of corporate social responsibility, social tariffs and online offerings appeal to very few people as reasons to switch. On the other hand, green tariffs are a motivation for a small minority: these are mainly aged 15-34. Fixed price deals had a particular attraction for some, notably both gas and electricity PPM customers.

# Finding out about the deals available

**Q19** ***Thinking about the last time you switched gas supplier, how did you find out about the deals offered by the supplier you switched to?***

| | | | | | Housing Tenure | |
|---|---|---|---|---|---|---|
| | **All** | **PPM (gas)** | **Social Group DE** | **Scotland** | **Rented** | **Non-rented** |
| *Base: All with mains gas who have ever switched* | *(536)* % | *(49)* % | *(148)* % | *(60)* % | *(135)* % | *(401)* % |
| They knocked on my door | 41 | 68 | 59 | 59 | 52 | 39 |
| Used online website/price comparison service | 21 | 2 | 8 | 17 | 7 | 25 |
| I saw an advert | 11 | 6 | 4 | 6 | 8 | 11 |
| They phoned me | 7 | 3 | 5 | 5 | 5 | 7 |
| A friend or family member told me about it | 6 | 2 | 10 | 4 | 10 | 4 |
| I rang them (only) | 5 | 6 | 5 | 0 | 6 | 5 |
| I rang them and other suppliers | 4 | 3 | 3 | 3 | 2 | 4 |
| Other | 6 | 7 | 11 | 0 | 8 | 6 |
| Don't know | 4 | 2 | 1 | 7 | 4 | 4 |

Source: Ipsos MORI

**Q23** ***Thinking about the last time you switched electricity supplier, how did you find out about the deals offered by the supplier you switched to?***

| | | | | | Housing Tenure | |
|---|---|---|---|---|---|---|
| | **All** | **PPM (elec)** | **Social Group DE** | **Scotland** | **Rented** | **Non-rented** |
| *Base: All with mains electricity who have ever switched* | *(611)* % | *(71)* % | *(170)* % | *(62)* % | *(167)* % | *(443)* % |
| They knocked on my door | 41 | 63 | 56 | 60 | 52 | 38 |
| Used online website/price comparison service | 22 | 5 | 10 | 8 | 8 | 25 |
| I saw an advert | 12 | 9 | 5 | 5 | 10 | 12 |
| They phoned me | 6 | 7 | 5 | 7 | 6 | 6 |
| A friend or family member told me about it | 5 | 4 | 6 | 4 | 6 | 5 |
| I rang them (only) | 4 | 1 | 4 | 2 | 4 | 4 |
| I rang them and other suppliers | 3 | 1 | 2 | 5 | 2 | 3 |
| Other | 6 | 13 | 12 | 0 | 9 | 6 |
| Don't know | 5 | 4 | 3 | 10 | 5 | 5 |

Source: Ipsos MORI

Doorknocking remains the primary method by which electricity and gas sales have been made. It is cited by almost twice as many switchers as online comparison services, the next most prevalent method. Some types of customer are more likely than others to have been sold their contract on the doorstep, notably many falling into the more vulnerable groups – PPM customers, social groups D and E (particularly the state supported group E), customers in Scotland and those in rented accommodation.

Use of online comparison services is largely the preserve of the AB and C1 social groups; few DEs make use of them. Only 2% of both types of customer with no internet access of their own have used these websites compared to 26% of gas customers and 28% of electricity customers who have their own internet access. Online services are also least used in Scotland, compared to England and Wales.

By comparison to doorknocking, outbound telephone sales contact is less common. Furthermore, very few customers have made direct contact with suppliers by calling them. Advertising tends to have been noticed and acted upon more frequently by the AB social group and by older people; few DEs mention advertising. It is also much less likely to be mentioned in Scotland.

# Customer Evaluation of Switching

**Q20a** ***To the best of the knowledge, do you feel that you are now paying <u>less</u> than you would have if you hadn't switched gas supplier?***

| | | | | Social Group | | Housing Tenure | |
|---|---|---|---|---|---|---|---|
| | Total | Direct debit (gas) | PPM (gas) | AB | E | Rented | Non-rented |
| *Base: All who switched gas supplier to save money* | (446) % | (317) % | (39) % | (97) % | (57) % | (107) % | (339) % |
| Yes | 64 | 69 | 42 | 70 | 53 | 57 | 66 |
| No | 20 | 17 | 43 | 17 | 33 | 33 | 18 |
| Don't know | 15 | 14 | 15 | 12 | 14 | 10 | 16 |

Source: Ipsos MORI

**Q20b** ***And do you think the deal you switched to has resulted in your saving less, more or about the same amount as you expected?***

| | | | Social Group | | Housing Tenure | |
|---|---|---|---|---|---|---|
| | Total | Direct debit (gas) | AB | E | Rented | Non- rented |
| *Base: All who switched gas supplier to save money who feel they are now paying less* | (286) % | (212) % | (66) % | (31) % | (65) % | (221) % |
| Less | 14 | 11 | 10 | 28 | 22 | 12 |
| More | 30 | 27 | 23 | 40 | 25 | 29 |
| The same | 51 | 55 | 60 | 26 | 39 | 53 |
| Don't know | 6 | 7 | 8 | 6 | 4 | 6 |

Source: Ipsos MORI

**Q24a** ***To the best of your knowledge, do you feel that you are now paying <u>less</u> than you would have if you hadn't switched electricity supplier?***

| | | | | Social Group | | Housing Tenure | |
|---|---|---|---|---|---|---|---|
| | Total | Direct debit (elec) | PPM (elec) | AB | E | Rented | Non-rented |
| *Base: All who switched electricity supplier to save money* | (516) % | (362) % | (57) % | (109) % | (67) % | (133) % | (383) % |
| Yes | 62 | 64 | 44 | 65 | 59 | 55 | 63 |
| No | 24 | 20 | 40 | 17 | 29 | 32 | 21 |
| Don't know | 15 | 16 | 16 | 18 | 12 | 13 | 16 |

Source: Ipsos MORI

| **Q24b** | ***And do you think the deal you switched to has resulted in your saving less, more or about the same amount as you expected*** | | | | | |
|---|---|---|---|---|---|---|
| | | | Social Group | | Housing Tenure | |
| | Total | Direct debit (elec) | AB | E | Rented | Non- rented |
| *Base: All who switched electricity supplier to save money who feel they are now paying less* | *(318)* % | *(231)* % | *(71)* % | *(38)* % | *(74)* % | *(224)* % |
| Less | 15 | 12 | 11 | 38 | 29 | 11 |
| More | 25 | 25 | 21 | 28 | 25 | 25 |
| The same | 54 | 56 | 63 | 32 | 45 | 56 |
| Don't know | 6 | 7 | 5 | 2 | 2 | 7 |

Source: Ipsos MORI

Just under two-thirds of those who switched either gas or electricity supplier in order to save money now feel that switch was successful, that is, they feel they are now paying less than they would have done. Those who switched gas supplier have been marginally more successful than those switching electricity supplier – just 20% believe they are not saving money compared to 24% for electricity switchers.

The most successful switching is by those on direct debit and standard credit. PPM customers, whether for gas or electricity, are most likely to believe they are not saving money (39% gas, 40% electricity). Successful switches are also related to social group: 70% of AB gas switchers believe they are paying less compared to just 53% of state supported group E. In fact, there is evidence across the board that many of the groups most likely to be vulnerable are least likely to feel their switch has been successful. Those in rented accommodation are a case in point: 33% of gas switchers and 32% of electricity switchers in rented accommodation believe they have not saved money; a considerably larger proportion than among those in non-rented accommodation. Linked to social group and payment method, internet access also leads to more successful switching.

Despite the majority of those who switched to save money feeling they have, indeed, done so, the extent of these perceived savings are highly variable and, for some, unpredictable. On balance, both gas and electricity switchers are more likely to say they have saved **more** than expected than to say they have saved **less** than expected. The balance is marginally more positive in the case of gas customers. Only about half of each were accurate in their predictions. There are indications that PPM customers are most likely of all to save more than expected, but sample sizes of these are too small to be reliable.

The AB social group, along with the C1 group, are most likely to have been accurate in their estimations of what they would save. By contrast, social group E is least likely to say they have saved the amount expected. Furthermore, group E, along with group D, is most likely to have saved less than expected. It is possible to identify again a pattern whereby those from vulnerable groups appear to receive the worst deal – those in rented accommodation, for example, are at least twice as likely to believe they have saved less than expected from switching. It is likely this is linked to the fact that a higher proportion in these groups switched as a result of a sales call, rather than having compared the prices of a number of suppliers.

# Household Financial Stability

**Q25** ***Which of these statements best applies to you?***

| | | Social Group | | | Housing Tenure | |
|---|---|---|---|---|---|---|
| | **Total** | **AB** | **D** | **E** | **Rented** | **Non- rented** |
| *Base: All with gas or electricity who are responsible for bills* | *(1,539)* % | *(306)* % | *(263)* % | *(197)* % | *(505)* % | *(1,028)* % |
| We are keeping up with all the household bills without any difficulties | 70 | 83 | 64 | 47 | 49 | 78 |
| We are keeping up with all the household bills, but it is a struggle from time to time | 20 | 13 | 21 | 29 | 31 | 15 |
| We are keeping up with all the household bills, but it is a constant struggle | 7 | 3 | 11 | 16 | 14 | 4 |
| We are falling behind with some household bills | 1 | 0 | 2 | 3 | 3 | 1 |
| We are having real financial problems and have fallen behind with many bills | 2 | 1 | 2 | 2 | 2 | 1 |

Source: Ipsos MORI

The vast majority of energy customers are able to keep up with their bills (97%), but a significant proportion experience a struggle to do so. About one in three (30%) struggle at some point and one in ten (10%) find it either a constant struggle or actually fall behind. This last group is naturally highly correlated with those groups defined as “vulnerable” – the proportion experiencing a constant struggle or falling behind reaches 15% among social group D and 21% among group E, the state supported. By contrast it includes only 4% of social groups AB. It also includes 19% of those in rented accommodation (compared to only 6% of those in non-related accommodation).

# Appendices

#Sample Profile

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

| | **All** *(2,063)* % | **All 2007** *(2,020)* % |
|---|---|---|
| *Base: All respondents* | | |
| Mains gas | *81* | 78 |
| Mains electricity | 95 | 94 |
| Neither/Don't know/Refused | 3 | 5 |

Source: Ipsos MORI

**Q2a** ***Are you responsible or jointly responsible for the gas or electricity bills in your household?***

| *Base: All with mains gas or electricity* | **All** *(1,981)* % | **All 2007** *(1,964)* % |
|---|---|---|
| Yes | 75 | 77 |
| No | 25 | 23 |

Source: Ipsos MORI

**Q2c** ***Are you on a dual fuel deal?***

| *Base: All with mains gas and electricity who are responsible for the bill and have same supplier for both* | **All** *(1,005)* % | **All 2007** *(1,964)* % |
|---|---|---|
| Yes | 64 | - |
| No | 22 | - |

Source: Ipsos MORI

**Q3** ***How do you pay for the gas you use?***

| *Base: All those with mains gas who are responsible for the bill* | **All** *(1,243)* % | **All 2007** *(1,243)* % |
|---|---|---|
| Monthly direct debit | 65 | 62 |
| Pay quarterly in arrears | 19 | 23 |
| Prepayment meter | 10 | 8 |
| Fuel Direct | * | * |
| Weekly/fortnightly payment scheme | 1 | 2 |
| Payment card/book ad hoc | 3 | 3 |
| Other | 1 | 1 |
| Don't know | 1 | 1 |

Source: Ipsos MORI

**Q4** ***How do you pay for the electricity you use?***

| *Base: All those with mains electricity who are responsible for the bill* | **All** *(1,519)* % | **All 2007** *(1,516)* % |
|---|---|---|
| Monthly direct debit | 64 | 60 |
| Pay quarterly in arrears | 19 | 24 |
| Prepayment meter | 11 | 9 |
| Fuel Direct | * | * |
| Weekly/fortnightly payment scheme | 2 | 2 |
| Payment card/book ad hoc | 3 | 3 |
| Other | 1 | 1 |
| Don't know | 1 | 1 |

Source: Ipsos MORI

| *Demographics* | | | | |
|---|---|---|---|---|
| | **2007 Weighted** | **2007 Un-weighted** | **2008 Weighted** | **2008 Un-weighted** |
| | *(2,020)* % | *(2,020)* % | *(2,063)* % | *(2,063)* % |
| **Age** | | | | |
| 15-34 | 32 | 30 | 32 | 29 |
| 35-64 | 49 | 46 | 48 | 47 |
| 65+ | 20 | 24 | 20 | 24 |
| **Social Group** | | | | |
| AB | 26 | 21 | 26 | 20 |
| C1 | 29 | 29 | 29 | 30 |
| C2 | 21 | 21 | 21 | 21 |
| D | 16 | 16 | 16 | 17 |
| E | 8 | 12 | 9 | 12 |
| **Region** | | | | |
| England | 86 | 83 | 86 | 84 |
| Wales | 5 | 7 | 5 | 6 |
| Scotland | 9 | 10 | 9 | 10 |
| **Area** | | | | |
| Urban | - | - | 27 | 27 |
| Suburban | - | - | 52 | 54 |
| Rural | - | - | 21 | 19 |
| **Income** | | | | |
| Up to £11,499 | - | - | 15 | 19 |
| £11,500 - £24,499 | - | - | 18 | 18 |
| £25,000 + | - | - | 28 | 15 |
| **Internet access** | | | | |
| Yes | - | - | 72 | 67 |
| No | - | - | 28 | 33 |
| **Ethnic Group** | | | | |
| White | - | - | 89 | 90 |
| BME | - | - | 11 | 10 |

Source: Ipsos MORI

# Topline Results

#

J32618 Ofgem Switching Omnibus Questionnaire 2008

## Topline Results

#

- This topline shows the results for a face-to-face survey conducted among a representative quota sample of 2,063 residents of Great Britain in the period 29 February-6 March 2008.
- Data are weighted by sex, age, social class, region and working status
- Where results do not sum to 100, this may be due to multiple responses, computer rounding or the exclusion of don't knows/not stated
- Results are based on all respondents unless otherwise stated
- 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?**

| | March '07 | March '08 |
|---|---|---|
| | % | % |
| Yes – Mains electricity | 95 | 94 |
| Yes – Mains gas | 81 | 78 |
| No – Neither | 1 | 2 |
| Don't know | 1 | 2 |
| Refused | * | 1 |

Ask if code 1 or 2 at Q1: Others go to Q26

Q2a) **Are you responsible or jointly responsible for the gas or electricity bills in your household?**

| | March '07 | March '08 |
|---|---|---|
| | % | % |
| Yes | 77 | 75 |
| No | 23 | 25 |

Base: All who have mains electricity and/or gas (1,981)

If code '2' at Q2a GO TO Q26. ASK Q2b IF RESPONDENT HAS **BOTH** ELECTRICITY AND GAS AT Q1 (code 1 AND code 2): Others go to Q3

Q2b) **Do you have the same supplier for both electricity and gas?**

| | March '08 |
|---|---|
| | % |
| Yes | 80 |
| No | 17 |
| DK/Not sure | 3 |

Base: All who have both mains electricity and gas, and are responsible for bills (1,236)

Q2c) **IF YES: Are you on a dual fuel deal?**

| | March '08 % |
|---|---|
| Yes | 64 |
| No | 22 |
| DK/Not sure | 14 |

Base: All with same supplier for both fuels (1,005)

Ask Q3 if code '2' at Q1 and code '1' at Q2a

Q3. **How do you pay for the gas you use?**

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

Base: All with mains gas and responsible for bill (1,256)

Ask Q4 if code '1' at Q1 and code '1' at Q2a

Q4. **How do you pay for the Electricity you use?**

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

Base: All with mains electricity and responsible for bill (1,519)

Ask Q5 if code '2' at Q1 and code '1' at Q2a: others go to Q10

Q5. **Did you switch your gas supplier during 2007?**

| | March '07 % | March '08 % |
|---|---|---|
| Yes | 19 | 20 |
| No/Don't know | 81 | 80 |

Base: All with mains gas and responsible for bill (1,256)

Ask Q6 if code '1' at Q5 : others go to Q7

Q6. **If yes – how many times did you switch your gas supplier during 2007?**

| | March '08 |
|---|---|
| | % |
| Once | 87 |
| Twice | 11 |
| Three times or more | 2 |

Base: All switched gas supplier in 2007 (244)

ASK IF NOT SWITCHED GAS SUPPLIER DURING 2007

Ask if code '2' at Q5 others go to Q9

Q7. **Did you switch your gas supplier before 2007?**

| | March '07 | March '08 |
|---|---|---|
| | % | % |
| Yes | 22 | 29 |
| No | 78 | 71 |

Base: All who did not switch gas supplier during 2007 (1,012)

Q8. If yes at Q5 or Q 7 **– how many times have you ever switched your gas supplier?**

| | March '08 |
|---|---|
| | % |
| Once | 53 |
| Twice | 26 |
| Three times | 12 |
| Four times or more | 9 |

Base: All ever switched gas supplier (536)

ASK Q9 IF code 2 AT Q5: others go to Q10

Q9. **Even though you stayed with the same** gas **supplier during 2007, did you change the tariff you have with them or the method by which you pay them? [INTERVIEWER NOTE: This should only include changes instigated by the respondent - not those where the supplier, for example, changed the name of a tariff]**

| | March '08 |
|---|---|
| | % |
| Yes | 9 |
| No | 88 |
| Don't Know | 4 |

Base: All not switched gas supplier in 2007 (1,012)

Ask if code '1' at Q1 and code '1' at Q2a: others go to Q15

Q10. **Did you switch your electricity supplier during 2007?**

| | March '07 | March '08 |
|---|---|---|
| | % | % |
| Yes | 22 | 19 |
| No | 78 | 81 |

Base: All who have mains electricity and are responsible for bill (1,519)

Ask if code '1' at Q10: others go to Q12

Q11. **If yes – how many times did you switch your electricity supplier during 2007?**

| | March '08 |
|---|---|
| | % |
| Once | 82 |
| Twice | 15 |
| Three times or more | 2 |

Base: All switched electricity supplier in 2007 (292)

ASK IF NOT SWITCHED ELECTRICITY DURING 2007. (Ask if code '2' at Q10 : others go to Q13)

Q12. **Did you switch your electricity supplier before 2007?**

| | March '07 | March '08 |
|---|---|---|
| | % | % |
| Yes | 21 | 26 |
| No | 79 | 74 |

Base: All those who did not switch electricity supplier during 2007 (1,227)

Q13. If yes at Q10 or Q12 **– how many times have you ever switched your electricity supplier?**

| | March '08 |
|---|---|
| | % |
| Once | 55 |
| Twice | 23 |
| Three times | 13 |
| Four times or more | 9 |

Base: All ever switched electricity supplier (611)

ASK Q14 IF CODE 2 AT Q10: OTHERS GO TO Q15

Q14. **Even though you stayed with the same** electricity **supplier during 2007, did you change the tariff you have with them or the method by which you pay them? [INTERVIEWER NOTE: This should only include changes instigated by the respondent - not those where the supplier, for example, changed the name of a tariff]**

| | March '08 |
|---|---|
| | % |
| Yes | 8 |
| No | 89 |
| Don't Know | 4 |

Base: All not switched electricity supplier in 2007 (1,227)

**Summary 1**

| | March '07 | March '08 |
|---|---|---|
| | % | % |
| Ever switched gas supplier | 37 | 43 |
| Ever switched electricity supplier | 39 | 40 |

Base: All who have each fuel and pay bills (1,256 gas, 1,519 electricity)

**Summary 2**

| | March '07 | March '08 |
|---|---|---|
| | % | % |
| Switched either fuel in last year | 24 | 21 |
| Switched either fuel ever | 41 | 45 |

Base: All with either fuel and pay bills (1,539)

ASK IF (ELEC BILL PAYER AND NEVER SWITCHED ELEC SUPPLIER [Q1 code 1 + Q2a code 1 + Q10 code 2 + Q12 code 2]) OR (GAS BILL PAYER AND NEVER SWITCHED GAS SUPPLIER [Q1 code 2 + Q2a code 1 + Q5 code 2 + Q7 code 2]):Others go to Q17

Q15 If never switched either: **Did you know it was possible to switch to a different gas/electricity supplier?**

| | March '08 |
|---|---|
| | % |
| Yes | 80 |
| No | 16 |
| Not sure | 4 |

Base: All never switched either (844)

Q16 **For each of the items on this card could you please say which of them apply to you?**

| | | March '08 |
|---|---|---|
| | | % |
| a. | I'm happy with my current supplier/s | 72 |
| b. | I wouldn't trust a different supplier/s | 5 |
| c. | I've checked prices of other suppliers and I am already on a good deal | 9 |
| d. | I've checked prices of other suppliers and don't think I'd save enough to make switching worthwhile | 8 |
| e. | Although I haven't checked prices of other suppliers I don't think I'd save enough to make switching worthwhile | 10 |
| f. | I think switching would be too much hassle | 16 |
| g. | I am in debt with my current supplier/s so don't think I would be able to switch | * |
| h. | I live in a rented house and don't think my landlord would allow me to switch | 3 |
| i. | I wouldn't know how to go about switching even if I wanted to | 1 |
| j. | All the suppliers are pretty much the same so there is no point in switching | 12 |
| | None of these | 4 |

Base: All never switched either (844)

ASK Q17 IF RESPONDENT HAS MAINS GAS AND IS RESPONSIBLE FOR BILLS AND HAS SWITCHED GAS SUPPLIER EVER. (Q1 code 2 and Q2a code 1 and Code '1' at either at Q5 or Q7)

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

| | March '07 | March '08 |
|---|---|---|
| | % | % |
| Believed new supplier to be cheaper/to save money | 76 | 78 |
| Believed new supplier offered better service | 9 | 6 |
| Believed new supplier displayed greater corporate responsibility | * | 1 |
| Wanted to switch to a dual fuel package | 5 | 3 |
| Wanted to switch to a fixed-price deal | 1 | 2 |
| Wanted to switch to a social offering | 0 | 0 |
| Wanted to switch to a "greener", environmentally friendly tariff or supplier | * | 1 |
| The attraction of an online tariff | - | 0 |
| Other | 7 | 7 |
| Don't know | 2 | 2 |

Base: All ever switched gas supplier (536)

ASK Q18 IF RESPONDENT HAS MAINS GAS AND IS RESPONSIBLE FOR BILLS AND HAS SWITCHED GAS SUPPLIER EVER (Q1 code 2 and Q2a code 1 and Code '1' at either at Q5 or Q7)

Q18. **And what else was important in causing you to switch gas supplier on that occasion?**

| | March '07 | March '08 |
|---|---|---|
| | % | % |
| Believed new supplier to be | 40 | 54 |

| | | |
|---|---|---|
| cheaper/to save money | | |
| Believed new supplier offered better service | 13 | 15 |
| Believed new supplier displayed greater corporate responsibility | 1 | 1 |
| Wanted to switch to a dual fuel package | 11 | 4 |
| Wanted to switch to a fixed-price deal | 2 | 2 |
| Wanted to switch to a social offering | * | 0 |
| Wanted to switch to a "greener", environmentally friendly tariff or supplier | 1 | 2 |
| The attraction of an online tariff | - | 1 |
| Other | 7 | 6 |
| Don't know/nothing else | 2 | 20 |

Base: All ever switched gas supplier (536)

ASK Q17/Q18 IF RESPONDENT HAS MAINS GAS AND IS RESPONSIBLE FOR BILLS AND HAS SWITCHED GAS SUPPLIER EVER (Q1 code 2 and Q2a code 1 and Code '1' at either at Q5 or Q7)

Q17+Q18 COMBINED RESULTS **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?**

| | March '07 | March '08 |
|---|---|---|
| | *(436)* | *(517)* |
| | % | % |
| Believed new supplier to be cheaper/to save money | 76 | 84 |
| Believed new supplier offered better service | 9 | 19 |
| Believed new supplier displayed greater corporate responsibility | * | 1 |
| Wanted to switch to a dual fuel package | 5 | 6 |
| Wanted to switch to a fixed-price deal | 1 | 3 |
| Wanted to switch to a social offering | 0 | 0 |
| Wanted to switch to a "greener", environmentally friendly tariff or supplier | * | 2 |
| The attraction of an online tariff | - | 1 |
| Other | 7 | 11 |
| Don't know/nothing else | 2 | 2 |

Base: All ever switched gas supplier (536)

ASK Q19 IF RESPONDENT HAS MAINS GAS AND IS RESPONSIBLE FOR BILLS AND HAS SWITCHED GAS SUPPLIER EVER (Q1 code 2 and Q2a code 1 and Code '1' at either at Q5 or Q7)

Q19 **Thinking about the last time you switched gas supplier, how did you find out about the deals offered by the supplier you switched to? [do not prompt]**

| | March '08 |
|---|---|
| | % |
| Used an on-line/website price comparison service (e.g. USwitch) | 21 |
| They knocked on my door | 41 |
| They phoned me | 7 |
| I saw an advert | 11 |
| I rang them | 5 |
| I rang them and other suppliers | 4 |
| A friend or family member told me about it | 6 |
| Other | 6 |
| Don't know | 4 |

Base: All ever switched gas supplier (536)

ASK Q20 IF Q17 OR Q18 is code 1 (SWITCHED GAS SUPPLIER TO SAVE MONEY): Others go to Q21

Q20a **To the best of your knowledge, do you feel that you are now paying less than you would have if you hadn't switched?**

| | March '08 |
|---|---|
| | % |
| Yes | 64 |
| No | 20 |
| Don't know/Not sure | 15 |

Base: All ever switched gas supplier to save money (446

**If Yes at 20a:**

Q20b **And do you think that the deal you switched to has resulted in your saving less, more or about the same amount you expected?**

| | March '08 |
|---|---|
| | % |
| Less | 14 |
| More | 30 |
| The same | 51 |
| Don't know/Not sure | 6 |

Base: All who feel they are now paying less for gas (286)

ASK Q21 IF RESPONDENT HAS ELECTRICITY AND IS RESPONSIBLE FOR BILLS AND HAS SWITCHED ELECTRICITY SUPPLIER EVER (Q1 code 1 and Q2a code 1 and Code '1' at either Q10 or Q12)

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

| | March '07 | March '08 |
|---|---|---|
| | % | % |
| Believed new supplier to be cheaper/to save money | 71 | 77 |
| Believed new supplier offered better service | 10 | 6 |
| Believed new supplier displayed greater corporate responsibility | 1 | 1 |
| Wanted to switch to a dual fuel package | 7 | 4 |
| Wanted to switch to a fixed-price deal | 3 | 2 |
| Wanted to switch to a social offering | * | 0 |
| Wanted to switch to a "greener", environmentally friendly tariff or supplier | 1 | 2 |
| The attraction of an online tariff | - | 0 |
| Other | 5 | 6 |
| Don't know | 3 | 2 |

Base: All ever switched electricity supplier (611

Ask Q22 IF RESPONDENT HAS ELECTRICITY AND IS RESPONSIBLE FOR BILLS AND HAS SWITCHED ELECTRICITY SUPPLIER EVER (Q1 code 1 and Q2a code 1 and Code '1' at either Q10 or Q12)

Q22. **And what else was important in causing you to switch electricity supplier on that occasion?**

| | March '07 | March '08 |
|---|---|---|
| | % | % |
| Believed new supplier to be cheaper/to save money | 40 | 54 |
| Believed new supplier offered better service | 13 | 17 |
| Believed new supplier displayed greater corporate responsibility | 1 | 1 |
| Wanted to switch to a dual fuel package | 9 | 5 |
| Wanted to switch to a fixed-price deal | 3 | 4 |
| Wanted to switch to a social offering | 1 | 0 |
| Wanted to switch to a "greener", environmentally friendly tariff or supplier | * | 2 |
| The attraction of an online tariff | - | 1 |
| Other | 3 | 4 |
| Don't know/nothing else | 35 | 18 |

Base: All ever switched electricity supplier (611)

ASK Q21 IF RESPONDENT HAS ELECTRICITY AND IS RESPONSIBLE FOR BILLS AND HAS SWITCHED ELECTRICITY SUPPLIER EVER (Q1 code 1 and Q2a code 1 and Code '1' at either at Q10 or Q12)

Q21+Q22 COMBINED RESULTS **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?**

| | March '07 | March '08 |
|---|---|---|
| | *(560)* | *(611)* |
| | % | % |
| Believed new supplier to be cheaper/to save money | 71 | 85 |
| Believed new supplier offered better service | 10 | 21 |
| Believed new supplier displayed greater corporate responsibility | 1 | 1 |
| Wanted to switch to a dual fuel package | 7 | 8 |
| Wanted to switch to a fixed-price deal | 3 | 5 |
| Wanted to switch to a social offering | * | 0 |
| Wanted to switch to a "greener", environmentally friendly tariff or supplier | 1 | 3 |
| The attraction of an online tariff | - | 1 |
| Other | 5 | 9 |
| Don't know/nothing else | 3 | 19 |

Base: All ever switched gas supplier (536)

Ask Q23 IF RESPONDENT HAS ELECTRICITY AND IS RESPONSIBLE FOR BILLS AND HAS SWITCHED ELECTRICITY SUPPLIER EVER (Q1 code 1 and Q2a code 1 and Code '1' at either Q10 or Q12)

Q23. **Thinking about the last time you switched electricity supplier, how did you find out about the deals offered by the supplier you switched to? [do not prompt]**

| | March '08 |
|---|---|
| | % |
| Used an on-line/website price comparison service (e.g. USwitch) | 22 |
| They knocked on my door | 41 |
| They phoned me | 6 |
| I saw an advert | 12 |
| I rang them | 4 |
| I rang them and other suppliers | 3 |
| A friend or family member told me about it | 5 |
| Other | 6 |
| Don't know | 5 |

Base: All ever switched electricity supplier (611)

ASK Q24 IF Q21 OR Q22 is code 1 (SWITCHED ELECTRICITY SUPPLIER TO SAVE MONEY): Others go to Q25

Q24a **To the best of your knowledge, do you feel that you are now paying less than you would have if you hadn't switched?**

| | March '08 |
|---|---|
| | % |
| Yes | 62 |
| No | 24 |
| Don't know/Not sure | 15 |

Base: All ever switched electricity supplier to save money (516)

If Yes at 24a:

Q24b **And do you think that the deal you switched to has resulted in your saving less, more or about the same amount you expected?**

| | March '08 % |
|---|---|
| Less | 15 |
| More | 25 |
| The same | 54 |
| Don't know/Not sure | 6 |

Base: All who feel they are now paying less for electricity (318)

ASK ALL WITH MAINS GAS/ELEC AND RESP FOR BILLS (Q1 codes 1 OR 2 and Q2a code 1)

Q25 **Which of these statements best applies to you?**

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

Base: All with mains electricity or gas and responsible for bills (1,539)

ASK ALL

Q26 **During 2007, did you switch supplier for any of the following:**

| | | March '08 % |
|---|---|---|
| a) | Home telephone line | |
| | Yes | 17 |
| | No | 79 |
| | Don't know | 4 |
| b) | Mobile phone network | |
| | Yes | 16 |
| | No | 81 |
| | Don't know | 3 |

Base: All

IF Q26a NOT CODE 1

Q27 **Have you EVER switched the supplier for your home telephone line?**

| | March '08 % |
|---|---|
| Yes | 23 |
| No | 77 |

Base: All not switched home telephone line in 2007 (1,711)

**Summary: Ever switched home telephone?**

| | |
|---|---|
| Yes | 37 |
| No | 60 |

Base: All