Customer Engagement with the Energy Market - Tracking Survey 2012

Report prepared for Ofgem

12 April 2012

Legal notice

If you would like to enquire about using any element of this report, or you would like further information about the research, then please contact Ofgem's Consumer First Team (consumer.first@ofgem.gov.uk).

Contents

Introduction and Methodology

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 surveys in March 2007, March 2008, March 2010 and January 2011 though there are some questionnaire changes year-on-year.

The research vehicle chosen was Ipsos MORI's weekly omnibus survey, known as the *Capibus*, for which the fieldwork dates were 2-13 March 2012, achieving 1,956 computer-assisted personal interviews.

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

Selection of Respondents

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

Quality Control

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

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

Data Processing

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

Weighting

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

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

While the nationally representative sample comprised 1,956 interviews, most of the figures in this report are based on 1,232 gas customers and 1,461 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.

Ref: 12-007350

Summary

Summary

- This survey, conducted in March 2012, shows that 13% of gas customers and 14% of electricity customers switched their supplier during 2011. Although the year-on-year decline for gas customers is not statistically significant, it represents a third year of decline for gas customers and a fourth year of decline for electricity customers, among whom the decline from 2011 is statistically significant.

- Analysis by payment methods shows that although PPM customers are again lagging marginally behind direct debit payers, it is the remaining standard credit customers among whom switching rates are now very low indeed. A clear relationship exists in 2011 between social grade and switching rates, with professional and managerial ABs much more likely to have switched than the state-supported grade Es. Also particularly apparent is the disparity between the main ethnic groups, with white respondents much more likely to switch than those from black and minority ethnic groups (BMEs). Internet access, itself highly correlated with social grade, also remains a strong discriminator – those with internet access are more than twice as likely to have switched in 2011. Overall 83% of energy customers now have internet access and for both fuels the proportion of customers on online accounts is now 22%.

- The proportion of customers who have "ever switched" each fuel, meaning they reported that they have switched gas and/or electricity supplier at some point in the past, has declined significantly this year. This follows on from a marginal decline in these figures last year. This trend may be due to a combination of factors including a tendency for respondents to forget switches made in the past (the market has been open now for over a decade). It is possible that it may also be driven by the complicating effects of home moving (e.g. respondents may not account for switches at previous addresses) and a concentration of switching behaviour among a more limited proportion of the population. This last theory is supported by the increase in the frequency of switching among those who have ever switched – the proportions who have switched each fuel four times or more are up a significant four points to 15% in each case.

- The profile of those who have ever switched each fuel remains skewed towards those (now) on direct debit, the higher social grades (especially ABs) and those not renting their homes. Customers in vulnerable groups such as the state-supported grade Es and those who rent their homes are lagging behind. Ethnicity is also a key factor; white respondents are twice as likely to have switched each fuel as are BMEs. Those with internet access are also more likely to have ever switched.

- The switching of tariffs or payment methods without switching suppliers in the last year is unchanged for gas and up just two points for electricity. While this is not statistically significant, it does fit in to a longer term upward trend. Like supplier switching, tariff switching is related to payment method and social grade – customers now on direct debit are more likely to have switched to this method, and ABs are more likely to have switched than social grade Es. There has also been notably greater tariff switching in Scotland for both fuels. The principal trigger for tariff switching is to save money. The most common method for finding out about other tariffs from one's own supplier is to use a website comparison service, though for the DE social grades and the 65+ ager group visits by doorstep salespersons are most important. The younger (15-34) age group prefer to phone a comparison service. The actual change is more likely to be made by calling the supplier, or in the case of social grade DE and the 65+, through the doorstep salesperson.

- Among those who did not change tariff in 2011/12, 68% are aware it is possible to do so. Awareness is poorest among those groups often considered more "vulnerable" including the DE social grades, the BME ethnic group, those in rented accommodation, those with no internet access and those on standard credit or PPMs.

- The proportion of energy customers who have received information from their supplier on the name of their tariff is up six points to 48%. Those aware tend to be on direct debit, social grade AB, middle aged (35-64) and of the white ethnic group. Those in Scotland are more likely to be aware than in England. Awareness in Wales is indicated to be lowest of all, but the small sample size in Wales makes this difference inconclusive. The proportion who have received information on changes in their tariff is down five points this year to 40%, though this will depend to some extent on whether changes have actually been made. The proportion who have received information on the forecast cost of energy consumption, a key element in the Annual Statements introduced in July 2010, is substantially unchanged at 44%.

- The awareness among non-switchers that it is possible to switch energy suppliers has fallen by seven points this year to 80%. It is possible the year-on-year comparison has been muddied somewhat by the change in precise question wording. Nevertheless, reasons for not switching supplier show a similar pattern to previous years, with the principal reason given as "I'm happy with my current supplier(s)" –by 78% - and "Switching is a hassle" by 20%. There is, however, a significant fall in the proportion who state that there is not sufficient difference between suppliers to make switching worthwhile. Non-switchers would want to be able to save on average about £167 per year as the minimum necessary to encourage them, though under half are able to give a numeric estimate of how much.

- The desire to save money remains the main trigger for switchers of gas and electricity. However there have been some changes in the sources of information used and in the way switches are made. The use of online price comparison services to find out about the deals offered is up 13 points for gas and seven points for electricity. At the same time, the use of doorstep salespersons has fallen by eight points for gas and seven points for electricity. However the use of salespersons in public places has increased for gas and is stable for electricity. Doorstep salespersons remain important for the 65+ age group, social grade DEs and those with no internet access. Gas switchers are now more likely to make the actual switch using an online price comparison service, which has overtaken the doorstep salesperson. For electricity switchers the pattern is a little different: calling the supplier is now the leading method of making the switch, followed by using an online price comparison service. Doorstep salespersons are now in third place, but remain of key importance to the 65+, the DE social grade and those with no internet access.

- On average, switchers expected on the last occasion to save around £173 per year by switching. Expectations are related to social grade – the ABs expect to save more – and inversely to age – 15-34s expect to save more than older switchers, especially the 65+.

- Switchers who wanted specifically to save money are more definite that they have either saved or not saved. The proportions who believe they are now paying less are significantly up for both gas and electricity switchers, though the proportions who do not believe this are also up marginally. Those who are unable to say have declined substantially, from 26% to 11% for gas, and from 25% to 14% for electricity. However, while most continue to say it was easy to decide which deal to switch to, there has been a significant move towards disagreement that it was easy. Similarly slightly fewer now agree that they are confident they fully understand the key features of the deal they switched to, though the vast majority of both gas and electricity switchers continue to agree. In an additional question this year, a majority of switchers (seven in ten) also agree that they would be confident that if they switched again they would make the right choice for them. Nevertheless, approaching one in five switchers disagree with this (18% for gas; 17% for electricity).

- In a new question on trust in energy suppliers to be open and transparent in their dealings with consumers, the overall balance of opinion is negative, though some sub-groups show higher trust of the industry. On balance, energy suppliers are more likely to be distrusted than trusted. The net distrust is greatest among social grade AB, the middle age group (35-64) and in Scotland. On the other hand, the 65+ age group, social grade DE and those who rent their homes are all more likely to trust suppliers than to distrust them.

Incidence of Switching

Q12a. Did you switch your gas supplier in 2011?												
	All 2012	Payment method			Social grade			Ethnicity		Previous survey years (all)		
		Direct debit	Standard credit	PPM (gas)	AB	C1	E	White	BME	2008	2010	2011
Base: All with mains gas who are responsible for the bill	*(1,232) %*	*(803) %*	*(168) %*	*(159) %*	*(242) %*	*(375) %*	*(133) %*	*(1,104) %*	*(127) %*	*(1,256) %*	*(1,369) %*	*(1,331) %*
Yes	**13**	16	5	10	19	14	8	14	6	*20*	*17*	*15*
No	**87**	84	95	90	81	86	92	86	94	*80*	*83*	*85*

Source: Ipsos MORI

Q16a. Did you switch your electricity supplier in 2011?												
	All 2012	Payment method			Social grade			Ethnicity		Previous survey years (all)		
		Direct debit	Standard credit	PPM (elec)	AB	C1	E	White	BME	2008	2010	2011
Base: All with mains electricity who are responsible for the bill	*(1,461) %*	*(946) %*	*(193) %*	*(198) %*	*(284) %*	*(452) %*	*(161) %*	*(1,321) %*	*(139) %*	*(1,519) %*	*(1,540) %*	*(1,500) %*
Yes	**14**	17	7	12	18	14	10	14	8	*19*	*18*	*17*
No	**86**	83	93	88	82	86	90	86	92	*81*	*82*	*83*

Source: Ipsos MORI

The proportion who switched supplier in 2011 has declined below the level of 2010, a third year of decline for gas customers and a fourth year of decline for electricity customers. Just 13% of gas customers and 14% of electricity customers switched their supplier in 2011. The decline 2010-11 is statistically significant for electricity customers, but for gas customers needs to be seen in the context of the longer term figures.

The strongest contrasts in switching rates are evident by payment type, social grade and ethnicity. For both gas and electricity direct debit customers are significantly more likely to have switched, particularly in contrast to standard credit customers, whose switching rate is very low. PPM customers are now well ahead of standard credit customers, though still some way behind those on direct debit. There is a clear relationship of switching to social grade, with significantly greater switching of gas and electricity among the professional and managerial AB group compared to the state-supported group E. Between the two extremes there is a downward gradient, for example the white collar C1 group shows a lower level of switching than ABs but still higher than social grade E. For gas customers, this year's survey shows a significant difference in the views of the white ethnic group compared to the black and minority ethnic groups (BME) – around 10% of gas customers - who are much less likely to have switched. For electricity customers the difference is not statistically significant.

No statistically significant differences are observed this year by age group, for either gas or electricity. Switching of both fuels is apparently lower in Wales than in Scotland an England, but the very small sample size in Wales makes it difficult to be conclusive.

Q12a/16a. Did you switch your supplier in 2011? - Effect of Internet Access

	Q12a. Gas				**Q16a. Electricity**		
	Internet Access				**Internet Access**		
	All	Yes	No		All	Yes	No
Base: All with each fuel who are responsible for the bills	*(1,232) %*	*(1,030) %*	*(202) %*		*(1,461) %*	*(1,214) %*	*(247) %*
Yes	13	14	6		14	15	6
No	87	86	94		86	85	94

Source: Ipsos MORI

For both gas and electricity, those with internet access are more likely to have switched in 2011 than those without. It seems likely this is strongly correlated with the social grade differences noted. In fact, the difference is more marked than last year. Overall 83% of energy customers now have internet access (up four points from last year). The proportion of customers on online tariffs continues to grow. For both fuels it has now reached 22%.

Q12a/12b/13 Summary Table – Ever switched gas supplier (to March 2012)													
	All 2012	**Payment method**			**Social grade**		**Ethnicity**		**Tenure**		**Previous survey years (all)**		
		Direct debit	Standard credit	PPM (gas)	AB	E	White	BME	Rent ed	Non rented	2008	2010	2011
Base: All with mains gas who are responsible for the bill	*(1,232) %*	*(803) %*	*(168) %*	*(159) %*	*(242) %*	*(133) %*	*(1,104) %*	*(127) %*	*(330) %*	*(898) %*	*(1,256) %*	*(1,369) %*	*(1,331) %*
Yes	**37**	45	22	22	49	26	39	18	26	41	*43*	*43*	*41*
No	**63**	55	78	78	51	74	61	82	74	59	*57*	*57*	*59*

Source: Ipsos MORI

Q16a/16b/17 Summary Table – Ever switched electricity supplier (to March 2012)													
	All 2012	**Payment method**			**Social grade**		**Ethnicity**		**Tenure**		**Previous survey years (all)**		
		Direct debit	Standard credit	PPM (elec)	AB	E	White	BME	Rent ed	Non rented	2008	2010	2011
Base: All with mains electricity who are responsible for the bill	*(1,461) %*	*(792) %*	*(163) %*	*(153) %*	*(284) %*	*(161) %*	*(1,321) %*	*(139) %*	*(391) %*	*(1,066) %*	*(1,519) %*	*(1,540) %*	*(1,500) %*
Yes	**35**	44	23	24	47	26	37	19	25	39	*40*	*42*	*40*
No	**65**	56	77	76	53	74	63	81	75	61	*60*	*58*	*60*

Source: Ipsos MORI

This year's decline in the proportions who claim to have ever switched each fuel is greater than last year and is statistically significant. When added to last year's slight decline it suggests more strongly that, rather than year-on-year variation due to sampling fluctuations, there may be some mechanism by which the tendency to under report previous switching behaviour is increasing[1]. It is most likely that this results from issues of memory (the energy market has been open to competition for over a decade). A further complicating effect may

[1] The phenomenon of declining proportions of the population who report having *ever* switched a utility services supplier is well established. Ofcom's Consumer Experience 2011 Survey shows declines in the "ever switched proportions" for five out of the nine utility services asked about since 2008. http://stakeholders.ofcom.org.uk/market-data-research/market-data/consumer-experience-reports/consumer-experience/

be related to home moving. Between five and ten per cent of the population moves home each year and this may impact on how they answer the question about whether they have ever switched – for example, some may answer about their current address only, forgetting any previous addresses. An alternative (or additional) explanation may be that the proportion of the population who are ever included in the “switched in last 12 months” figure is failing to grow. This is supported to some extent by the reported frequency of switching: the proportion who have switched gas supplier more than once has grown from 44% last year to 55% this year, while the proportion who have switched electricity supplier more than once is up from 44% to 57%. At the extreme of the scale, the proportions who have switched gas supplier and electricity supplier four times or more are respectively up four points to 15% in both cases. This is by no means conclusive, but it points to a market where fewer people are engaging in switching, but more often.

Those who have ever switched their gas supplier are most likely to be on direct debit, from higher social grades (especially AB), of white ethnicity and not renting their homes. There is also some indication they are aged from 35 upwards. Wales lags some way behind Scotland and England but again the sample size is too small to be conclusive. Those who have ever switched their electricity supplier are similarly (and significantly) focused on direct debit, social grade AB, white ethnicity and not renting homes. The 35-64 age group stands out as significantly more likely to have switched. Again Wales lags a little behind England and Scotland but the difference is not conclusive.

Those with internet access are significantly more likely to have ever switched gas and electricity supplier than those without. The same is true of those in rural areas – they are more likely to have ever switched either fuel than those in urban areas.

Switching tariffs or payment methods

Q15a Even though you stayed with the same gas supplier in 2011 and so far in 2012, did you change the tariff you have with them or the method by which you pay them?

	All 2012	**Payment method**			**Social grade**		**Region**			**Previous survey years (all)**		
		Direct debit	Standard credit	PPM (gas)	AB	D	England	Scotland	Wales	2008	2010	2011
Base: All who did not switch gas supplier in 2011/12	*(1,075) %*	*(677) %*	*(158) %*	*(143) %*	*(194) %*	*(199) %*	*(938) %*	*(94) %*	*(43) %*	*(1,012) %*	*(1,134) %*	*(1,127) %*
Yes – changed either	**12**	14	10	5	20	8	11	21	10	*9*	*10*	*12*
Yes – tariff	**9**	11	3	4	15	5	8	17	10	*Not asked before 2012*		
Yes – payment method	**4**	3	7	3	5	3	4	4	0			
No/Don't know	**88**	86	90	95	80	92	89	79	90	*92*	*90*	*88*

Source: Ipsos MORI

Q19a Even though you stayed with the same electricity supplier in 2011 and so far in 2012, did you change the tariff you have with them or the method by which you pay them?

	All 2012	**Payment method**			**Social grade**		**Region**			**Previous survey years (all)**		
		Direct debit	Standard credit	PPM (elec)	AB	D	England	Scotland	Wales	2008	2010	2011
Base: All who did not switch electricity supplier in 2011/12	*(1,255) %*	*(786) %*	*(177) %*	*(174) %*	*(231) %*	*(221) %*	*(1,071) %*	*(136) %*	*(48) %*	*(1,227) %*	*(1,273) %*	*(1,246) %*
Yes – changed either	**12**	15	8	3	20	7	11	22	13	*8*	*8*	*10*
Yes – tariff	**10**	13	5	2	17	4	9	17	13	*Not asked before 2012*		
Yes – payment method	**3**	3	3	2	3	3	3	6	0			
No/Don't know	**88**	85	92	97	80	93	89	78	87	*93*	*91*	*89*

Source: Ipsos MORI

The proportion of those gas customers who switched their tariff or payment method since the beginning of 2011, among those who did not switch supplier in 2011/12, is 12%, the same as last year. Among electricity customers who did not switch supplier however, the proportion is up two points from 10% last year to 12%. This is not statistically significant, but it does imply a broad upward trend over several years in tariff switching. For both sets of customers, it is mostly tariffs that are switched, rather than payment methods.

Tariff switching is most prevalent among those now on direct debit, social grade ABs and, notably, customers in Scotland. Prepayment meter customers are among the least likely to switch tariffs. Both gas and electricity customers in rural areas are more likely to have switched their tariff than those in urban areas.

Too few of these tariff switchers actually changed their payment method to be able to conduct reliable analysis of the direction of changes, but indications are that the majority of changes in payment method that we can track are towards direct debit from another method. Just a handful have changed from direct debit to standard credit, PPM or payment card.

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

	All 2012	**Social grade**				**Tenure**	
		AB	C1	C2	DE	Rented	Non rented
Base: All changed tariff/payment method in 2011/12	*(174) %*	*(53) %*	*(55) %*	*(32) %*	*(34) %*	*(34) %*	*(139) %*
Believed new tariff/method to be cheaper	62	61	64	74	52	47	66
Believed new tariff/method offered better benefits	7	5	17	0	5	20	4
Wanted/fixed price deal	5	7	0	3	14	2	6
Wanted dual fuel	3	3	1	5	8	0	4
Wanted green tariff	2	6	0	0	0	6	2
Written communication/ marketing material	2	2	4	0	3	3	2

Source: Ipsos MORI

The principal trigger for tariff switching is to save money by switching to a cheaper tariff or a cheaper method of payment. This is consistent for all sub-groups, though social grade C1 and those in rented accommodation are also particularly concerned about obtaining better benefits (other than price), and social grade DE (unskilled and state supported) also mention wanting a fixed price deal.

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

	All 2012	Social Grade				Age			Internet Access	
		AB	*C1*	*C2*	*DE*	15-34	35-64	65+	Yes	No
Base: All changed tariff or payment method in 2011/12	*(174) %*	*(53) %*	*(55) %*	*(32) %*	*(34) %*	*(28) %*	*(102) %*	*(44) %*	*(156) %*	*(18) %*
Used online website comparison service	26	36	18	30	10	17	32	18	29	0
Written communications or marketing material	13	18	8	8	8	4	14	15	13	10
Supplier rep knocked on my door	12	13	4	4	30	16	7	22	12	10
They phoned me	8	1	15	17	10	11	10	2	8	12
Phoned comparison service	7	4	16	5	4	20	4	6	7	6
I rang them (only)	7	6	6	5	12	12	4	9	6	10
Spoke to salesperson in street/shopping centre	5	6	7	0	5	0	7	5	5	6
Looked at websites of more than one supplier	5	4	7	7	6	16	3	3	6	0
Looked at supplier's own website only	4	4	7	0	1	3	5	0	4	0
Friend or family member told me	3	2	1	6	6	*	3	4	2	10
Saw an advert	2	1	1	3	3	0	3	1	2	6
Rang them and other suppliers	2	2	1	2	1	0	1	4	2	2
Other	5	2	8	6	5	0	5	7	4	12
Don't know	7	8	5	10	6	6	8	6	6	15

Source: Ipsos MORI

Customers who switched tariff or payment method in 2011/12 found out about the method they changed to by a variety of means, led, but not dominated, by online website comparison services. This was the principal method for social grades AB, C1 and C2, as well as the 35-64 age group. The other two key methods are via written communications and by visits from supplier representatives. Written communications are important for social grade ABs and the 65+. age group. By contrast, supplier representatives are most important for social grade DE, but also for younger and older age groups (15-34s and the 65+). Those with internet access are most likely to use a website comparison service, but also use many other methods. Those without internet access mention various other methods, notably outbound calls from the supplier, representatives calling at the door, written communications and simply calling the supplier.

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

	All 2012	Social Grade		Age			Internet Access	
		AB	*DE*	15-34	35-64	65+	Yes	No
Base: All changed tariff or payment method in 2011/12	*(174) %*	*(53) %*	*(34) %*	*(28) %*	*(102) %*	*(44) %*	*(156) %*	*(18) %*
Phoning supplier	34	38	23	55	30	25	33	46
Online website comparison service	17	13	19	3	22	11	18	0
Through salesperson who knocked at my door	11	11	28	6	7	27	11	12
Through supplier's website	7	8	4	7	8	5	8	0
Telephone price comparison service	7	4	3	18	5	5	8	0
Written communications	6	7	8	0	7	9	6	4
Spoke to salesperson in street/shopping centre	3	2	6	2	3	5	3	11
Other	8	8	2	0	11	7	8	6
Don't know	7	8	6	9	7	7	6	21

Source: Ipsos MORI

Although information was sought most often from website comparison services, the actual change is most likely to have been made by simply phoning the supplier (particularly the case for social grade AB and the youngest age group – 15-34), though those who used supplier representatives to find out about tariffs tend to make the switch through them – this applies especially to social grade DE and the 65+ age group. The 15-34 age group are particularly likely to use telephone price comparison services and to make the switch through them.

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

	Total	Method of Payment (electricity)			Social Grade			Internet Access	
		Direct Debit	*Standard Credit*	***PPM (elec)***	AB	C1	DE	Yes	No
Base: All who have not changed gas or electricity tariff/payment method in 2011/12	*(1,139) %*	*(684) %*	***(160) %***	***(171) %***	*(189) %*	*(345) %*	*(347) %*	*(306) %*	*(820) %*
Yes	68	75	59	61	83	69	55	70	57
No	28	21	34	35	13	28	41	26	35
Don't know	5	4	7	4	4	4	5	4	8

Source: Ipsos MORI

Among those customers who did not change their tariff or payment method 2011/12, just over two-thirds, 68%, know it is possible to do so. This knowledge is associated with payment method and social grade: those on direct debit (electricity) are most likely to be aware, followed by those on PPMs with those on standard credit least aware. Over eight in ten social grade ABs are aware compared to seven in ten C1s and under six in ten DEs. Those with internet access are much more likely to be aware, as are those aged 35-64 and those not in rented accommodation.

By comparison, the sub-groups with the poorest awareness of the potential for changing tariff or payment method are among those often considered more "vulnerable": the DE social grades, especially the grade E group, the BME ethnic group, those in rented accommodation, those with no internet access and those on standard credit or PPMs.

Information received from Suppliers

Q5a In the last year, have you received information from your supplier about: the name of the tariff you are on (your tariff is the name and rate of the energy plan you pay your energy supplier for)?

	All 2012	Payment method (gas)			Social grade		Region			Internet		All
		Direct debit	Standard credit	PPM (gas)	AB	E	England	Scotland	Wales	Yes	No	2011*
Base: All with mains gas or electricity who are responsible for bills	*(1,484) %*	*(803) %*	*(168) %*	*(159) %*	*(287) %*	*(165) %*	*(1,267) %*	*(164) %*	*(53) %*	*(1,232) %*	*(252) %*	*(1,525) %*
Yes	**48**	53	36	42	54	39	48	57	31	49	37	*42*
No	**37**	32	46	48	31	45	37	32	52	36	43	*40*
Don't know	**15**	15	18	9	15	16	15	10	18	14	20	*18*

Source: Ipsos MORI

*2011 wording : "have you received **clearer** information"

Suppliers were required to start issuing Annual Statements to customers from July 2010. Since then there has been further strengthening of the requirements for information supply to customers through their bills. This year's questions relate again to the name of tariffs, changes to tariffs and forecast cost of energy, but with some small wording amendments, notably dropping the term "clearer information" in favour of simply "information".

The proportion of customers with gas or electricity who have received information on the name of their tariff is up six points to 48%. Customers are more likely to be aware of it if they are on direct debit (gas), if they are social grade AB, if they are in Scotland or if they have internet access. Those in Wales are apparently least aware, but the Welsh sample size is too small to be conclusive. The middle age group (35-64) is more likely to be aware than younger or older people. Those of the white ethnic group are more likely to be aware than BMEs.

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

	All 2012	Payment method (gas) Direct debit	Standard credit	PPM (gas)	Social grade AB	C1	DE	tenure Rented	Non-rented	Internet Yes	No	All 2011*
Base: All with mains gas or electricity who are responsible for bills	*(1,484) %*	*(803) %*	*(168) %*	*(159) %*	*(287) %*	*(459) %*	*(417) %*	*(401) %*	*(1,079) %*	*(1,232) %*	*(252) %*	*(1,525) %*
Yes	**40**	49	28	29	54	44	27	32	43	42	31	*45*
No	**48**	41	61	63	36	43	63	53	47	47	56	*44*
Don't know	**12**	11	11	9	10	13	10	14	11	12	13	*11*

Source: Ipsos MORI

*2011 wording : "have you received **clearer** information"

Just 40% of customers have received information on changes to their tariff in the last year, down five points from last year's figure, though the precise level of awareness will be affected by the number of changes to tariffs actually made in each year, so may not be strictly comparable.

Awareness is greater among those on direct debit, higher social grades, those not renting their home and those who have internet access, as well as the 35-64 age group and those in Scotland.

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

	All 2012	Payment method (gas) Direct debit	Standard credit	PPM (gas)	Social grade AB	DE	Tenure Rented	Non-rented	All 2011*
Base: All with mains gas or electricity who are responsible for bills	*(1,484) %*	*(803) %*	*(168) %*	*(159) %*	*(287) %*	*(417) %*	*(401) %*	*(1,079) %*	*(1,525) %*
Yes	**44**	49	42	33	49	37	33	47	*45*
No	**43**	39	44	61	35	53	52	40	*44*
Don't know	**13**	12	14	6	16	10	15	12	*11*

Source: Ipsos MORI

*2011 wording : "have you received **clearer** information"

The proportion of customers who have received information on the forecast cost of energy consumption is substantially unchanged from last year at 44%. It is higher among those on direct debit, those aged 35+, social grade AB and those who do not rent their homes.

Knowledge and Preconceptions about Switching

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

	All	Age			Social grade			Tenure		Previous survey years (all)		
	2012	15-34	35-64	65+	AB	D	E	*Rented*	Non-rented	2008	2010	2011
Base: All responsible for bills who have never switched gas or electricity supplier	*(934) %*	*(214) %*	*(470) %*	*(250) %*	*(145) %*	*(175) %*	*(113) %*	*(286) %*	*(644) %*	*(844) %*	*(847) %*	*(875) %*
Yes (to either elec or gas)	**80**	73	84	86	89	75	63	71	86	*80*	*83*	*87*
Yes to both	**79**	69	82	82	87	75	60	67	84	-	-	-
Yes – Electricity not gas	**2**	3	2	3	2	0	2	3	2	-	-	-
Yes – Gas not electricity	**1**	1	0	1	0	1	1	1	*	-	-	-
No	**16**	22	15	12	7	22	33	24	12	*16*	*14*	*10*
Don't know	**3**	6	2	1	4	2	4	5	2	*4*	*4*	*3*

Source: Ipsos MORI

The proportion who are aware it is possible to switch energy supplier has fallen this year, returning to the level of 2008: 80%. Awareness is now highest among the 65+ age group, social grade AB and those who do not rent their homes, as well as those on direct debit. Awareness was already lower among the 15-34 age group, the social grade DEs, those who rent their homes and the BME ethnic group, but these also show the largest falls in awareness since last year. It is possible the year-on-year comparison has been muddied somewhat by the change in precise question wording (asking about gas and electricity separately this year, then combining the answers).

Q22 For each of the items on this card/screen, could you please say which of them, if any, apply to you?	All 2012	Age 15-34	Age 35-64	Age 65+	Tenure Rented	Tenure Non-rented	All 2011*
Base: All responsible for bills but have never switched gas or electricity supplier	*(934) %*	*(214) %*	*(470) %*	*(250) %*	*(286) %*	*(644) %*	*(875) %*
I'm happy with my current supplier(s)	**78**	76	76	87	72	81	*77*
Switching is a hassle	**20**	16	22	21	16	22	*22*
I don't think there's any difference between suppliers to make switching worthwhile[1]	**13**	7	17	13	8	15	*20*
I've checked prices of other suppliers and I think I'm on the best deal[2]	**9**	11	8	9	8	9	*13*
I live in rented accommodation and I don't think my landlord would allow me to switch[3]	**3**	9	2	1	10	1	*3*
I wouldn't know how to switch even if I wanted to	**3**	3	3	1	4	2	*2*
I am unsure where to get info. to help me make a good choice	**2**	3	2	2	3	2	*4*
My supplier has told me I can't switch	**1**	1	1	0	1	1	-
I am in debt with my current supplier so I don't think I can switch	**1**	*	1	*	1	1	*1*

Source: Ipsos MORI

The reasons for not having switched show a similar pattern to last year, with eight in ten claiming to be happy with their current supplier and one in five saying "switching is a hassle". Somewhat fewer than last year believe there is not sufficient difference between suppliers to make switching worthwhile. At 13% this is down seven points from last year.

[1] 2011 wording: I don't think there is much difference …
[2] 2011 wording: …and I think I'm already on a good deal
[3] 2011 wording: I live in a rented house and I don't think my landlord would allow me to switch

The response that they are happy with their current supplier is more likely to be given by the 65+ age group, social grade ABs and those who do not rent their homes. Those who do not see enough difference between suppliers tend to be aged 35+ and from non-rented accommodation, and they are fairly evenly distributed across ABC1C2 social grades.

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

	Total	**Age**			**Social grade**			**Internet Access**	
		15-34	35-64	65+	AB	C1	E	*Yes*	No
Base: All giving numerical answer	*(412) %*	*(105) %*	*(222) %*	*(85) %*	*(81) %*	*(157) %*	*(32) %*	*(365) %*	*(47) %*
0-£50	**23**	29	21	24	23	21	37	23	29
£51-100	**30**	37	25	35	24	29	27	28	52
£101-£200	**26**	21	30	21	30	29	11	28	7
£201+	**20**	13	24	20	23	22	25	21	13
MEAN	**£167**	£129	£188	£160	£178	£167	£179	£170	£149
Base: All never switched supplier	*(943) %*	*(214) %*	*(470) %*	*(250) %*	*(145) %*	*(286) %*	*(113) %*	*(748) %*	*(186) %*
Not about saving money	**15**	11	14	20	10	9	15	13	22
Don't know	**35**	37	31	43	29	29	52	33	49
Refused	**2**	1	3	1	1	4	2	2	2

Source: Ipsos MORI

Just under half of non-switchers are able to state a minimum amount of money they would expect to save per year in order to encourage them to switch their energy supplier. Among these, the mean expected saving is £167 per year. They are broadly evenly divided between those who expect to save up to £100 and those who expect to save more. The mean amounts do not vary greatly by social grade, though the AB social grade does expect to save more. Older people too(35+) do expect to save more than the youngest age group. Those with internet access also have greater expectations of savings. There are some further differences in expectations by ethnicity – BMEs expect to save on average much more than the white ethnic group (£279 per year compared to £156). There are indications that expectations are higher in Wales but the sample size precludes conclusive analysis.

Most non-switchers however are unable to give a numerical amount. While 35% have no idea and 2% refuse to answer there is a third group of 15% who state that it is “not about saving money – other factors are more important”. This last group is more prevalent among the social grade D group, those who rent their homes and those with no internet access. They are also more likely to be 65+ and to pay by PPM.

Reasons for switching on last occasion

The pattern of reasons for switching supplier remains similar to last year, dominated by the desire to save money, though for gas supplier this is down three points since last year. There is no significant difference in any of the secondary responses for either gas or electricity switchers.

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

	All 2012	**Payment method**		**Tenure**		**Age**			**Previous survey years (all)**		
		Direct debit	Standard credit	Rented	Non rented	15-34	35-64	65+	2008	2010	2011
Base: All with mains gas and responsible for bill who have ever switched gas supplier	*(438) %*	*(346) %*	*(39) %*	*(83) %*	*(355) %*	*(73) %*	*(241) %*	*(124) %*	*(536) %*	*(589) %*	*(543) %*
Believed new supplier to be cheaper/to save money	**76**	77	61	63	79	67	78	79	*78*	*78*	*79*
Wanted to switch to a dual fuel package	**5**	6	5	9	5	6	5	6	*3*	*6*	*4*
Believed new supplier offered better customer service	**5**	5	11	4	6	6	5	5	*6*	*6*	*7*
Moved home#	**3**	3	8	12	2	9	3	-	-	-	-
Wanted a fixed price deal	**2**	3	3	4	2	4	2	3	*2*	*3*	*1*
Believed new supplier offered better benefits	**2**	2	4	-	1	1	3	1	-	-	-
Wanted a greener tariff	**1**	1	-	1	1	1	1	-	*1*	*1*	*1*
Wanted an online tariff	*****	-	3	-	*	-	-	1	-	-	*1*
Written communication from your supplier	*****	-	-	+	-	*	-	-	-	-	-
Other	**3**	3	1	5	3	4	2	6	*7*	*1*	*6*

Source: Ipsos MORI

added post fieldwork

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

	All 2012	Payment method: Direct debit	Payment method: Standard credit	Tenure: Rented	Tenure: Non rented	Age: 15.34	Age: 35.64	Age: 65+	Previous survey years (all): 2008	2010	2011
Base: All with mains electricity and responsible for bill who have ever switched gas supplier	*(499) %*	*(333) %*	*(43) %*	*(102) %*	*(397) %*	*(83) %*	*(278) %*	*(138) %*	*(611) %*	*(633) %*	*(587) %*
Believed new supplier to be cheaper/to save money	**77**	78	61	62	80	68	78	81	*77*	*77*	*77*
Wanted a dual fuel package	**5**	5	7	6	5	2	6	6	*6*	*7*	*5*
Believed new supplier offered better customer service	**5**	5	10	6	5	5	6	3	*4*	*6*	*5*
Moved home#	**3**	3	8	9	2	5	6	3	-	-	-
Believed new supplier offered better benefits	**2**	2	3	9	1	7	3	1	-	-	-
Wanted a fixed price deal	**1**	1	-	4	1	9	1	-	*2*	*4*	*2*
Wanted a greener tariff	*****	1	-	-	1	-	1	-	*2*	*1*	*2*
Written communication from your supplier	*****	-	-	*	-	*	-	-	-	-	-
Other	**2**	2	1	2	3	4	2	4	*6*	*1*	*6*

Source: Ipsos MORI

added post fieldwork

Finding out about the deals available

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

	All 2012	Social Grade		Age			Pay ment Method	Internet Access		Previous survey years (all)		
		AB	DE	15-34	35-64	65+	Direct Debit	Yes	No	2008	2010	2011
Base: All with mains gas and responsible for bill who have ever switched gas supplier	*(438) %*	*(118) %*	*(95) %*	*(73) %*	*(241) %*	*(124) %*	*(346) %*	*(389) %*	*(49) %*	*(536) %*	*(589) %*	*(543) %*
Online/website price comparison service	**34**	44	19	34	41	17	37	37	-	*21*	*26*	*21*
Supplier representative knocked at my door	**23**	21	24	14	22	32	22	21	47	*41*	*33*	*31*
Salesperson in public place	**10**	10	17	4	9	16	10	9	19	*-*	*7*	*7*
New supplier phoned me	**6**	3	6	6	6	5	5	6	8	*7*	*8*	*7*
Friend or family member	**6**	4	6	5	5	8	6	5	13	*6*	*7*	*6*
I rang them (only)	**4**	5	7	7	4	3	4	4	2	*5*	*2*	*3*
Phoned comparison service	**4**	4	3	7	3	4	4	4	-	*-*	*4*	*7*
Looked at websites of more than one supplier	**3**	4	3	2	5	1	3	4	-	*-*	*4*	*3*
I rang them and other suppliers	**3**	1	5	5	1	5	3	3	3	*4*	*1*	*2*
Looked at supplier's own website only	**3**	3	4	6	2	-	3	3	-	*-*	*1*	*4*
I saw an advert	**2**	1	2	-	2	4	2	2	6	*11*	*5*	*4*
Written communication or marketing material	**1**	2	1	*	2	1	1	2	-			
Other	**4**	2	6	7	3	3	3	4	4	*6*	*5*	*5*
Don't know	**4**	4	2	6	3	5	3	4	-	*4*	*3*	*4*

Source: Ipsos MORI

Q29. Thinking about the last time you switched your electricity supplier, how did you find out about the deals offered by the supplier you switched to?													
	All 2012	**Social Grade**		**Age**			**Pay ment Method**	**Internet Access**		**Previous survey years (all)**		
		AB	DE	15-34	35-64	65+	Direct Debit	Yes	No	2008	2010	2011
Base: All with mains electricity and responsible for bill who have ever switched gas supplier	*(499) %*	*(132) %*	*(117) %*	*(83) %*	*(278) %*	*(138) %*	*(388) %*	*(438) %*	*(61) %*	*(611) %*	*(633) %*	*(583) %*
Online/website price comparison service	**31**	38	19	31	37	15	35	34	-	*22*	*27*	*24*
Supplier representative knocked at my door	**22**	18	26	18	21	30	21	21	39	*41*	*34*	*29*
New supplier phoned me	**8**	5	14	7	9	5	6	8	13	*6*	*8*	*9*
Salesperson in public place	**7**	7	11	1	6	14	7	6	18	*-*	*6*	*7*
Phoned comparison service	**5**	7	3	6	6	4	6	6	1	*-*	*3*	*5*
Friend or family member	**5**	3	9	3	4	8	5	3	17	*5*	*7*	*6*
I saw an advert	**5**	3	4	4	3	8	5	4	5	*12*	*4*	*5*
Looked at supplier's own website	**4**	6	-	10	3	2	5	5	-	*-*	*2*	*4*
I rang them (only)	**4**	5	6	4	3	6	3	4	4	*4*	*2*	*4*
I rang them and other suppliers	**3**	1	5	6	3	3	3	3	4	*3*	*2*	*2*
Looked at the websites of more than one supplier	**3**	3	1	9	2	*	3	3	-	*-*	*3*	*2*
Written communication or marketing material	**1**	1	3	*	1	2	1	1	1			
Other	**3**	4	1	2	2	4	2	3	2	*6*	*6*	*5*
Don't know	**3**	2	2	2	3	2	2	3	1	*5*	*2*	*4*

Source: Ipsos MORI

The pattern of usage of information sources shows some interesting changes this year. The use of online website comparison services is sharply up for both gas and electricity switchers. At the same time the incidence of calls from doorstep salespersons is down, and is no longer the leading method of finding out about deals available. The use of salespersons in public places, however, is unchanged for electricity switchers and slightly up among gas switchers.

The comparison websites are used most by those on direct debit, social grade ABs, the 35-64 age group and (naturally) those with internet access. By contrast, door-to-door sales representatives are more important as sources of information for the 65+ age group, those with no internet access, and those in the DE social grade.

Method used to make the last switch

As in the case of finding out about the deals available, the last year has seen some changes to the methods used by switchers to actually make the switch. For gas switchers, instead of a doorstep salesperson being the main method used, it is now the online price comparison website. This is particularly the case for those now on direct debit, for the 35-64 age group, for those in the AB social grade and for those with internet access. Around a quarter still prefer to call the supplier to make the switch. Doorstep salespersons remain important to the 65+, the DE social grade and those with no internet access.

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

	All 2012	**Payment Method**		**Age**			**Social Grade**		**Internet Access**		**All 2011**
		Direct Debit	Standard credit	15-34	35-64	65+	AB	DE	Yes	No	
Base: All with mains gas and responsible for bill who have ever switched gas supplier	*(438) %*	*(346) %*	*(39) %*	*(73) %*	*(241) %*	*(124) %*	*(118) %*	*(95) %*	*(389) %*	*(49) %*	*(543) %*
Online/website price comparison service	**27**	30	13	24	34	14	33	13	29	2	*16*
Through a salesperson who knocked at my door	**24**	24	17	14	23	36	20	32	22	48	*29*
Phoning supplier	**24**	23	26	33	20	25	20	24	24	23	*25*
Through salesperson in public place	**7**	7	6	4	6	10	7	9	6	15	*6*
Telephone price comparison service	**5**	4	11	6	5	3	4	10	5	3	*2*
Through the supplier's website	**4**	4	-	3	4	3	7	2	4	-	*4*
Written communication	**1**	1	4	-	1	2	1	1	1	-	*1*
Other	**7**	5	16	12	5	6	4	7	6	8	*2*

Source: Ipsos MORI

For electricity switchers the pattern is a little different. Calling the supplier is now the most popular way to complete the switch while the use of a doorstep salesperson has declined and been overtaken by a rise in the use of online comparison websites. The preference to call the supplier is greatest among the younger (15-34) age group and among those on standard credit. The online price comparison website is most popular among social grade ABs, but it is also widely used among the C1 and C2 groups, only falling off among the DEs.

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

	All 2012	**Payment Method**		**Age**			**Social Grade**		**Internet Access**		**All 2011**
		Direct Debit	Standard credit	15-34	35-64	65+	AB	DE	Yes	No	
Base: All with mains electricity and responsible for bill who have ever switched electricity supplier	*(499) %*	*(388) %*	*(43) %*	*(83) %*	*(278) %*	*(138) %*	*(132) %*	*(117) %*	*(438) %*	*(61) %*	*(543) %*
Phoning supplier	**30**	29	40	41	27	29	31	26	30	26	*28*
Online/website price comparison service	**25**	28	10	22	30	12	28	15	27	2	*16*
Through a salesperson who knocked at my door	**23**	21	19	16	22	31	16	31	21	42	*28*
Through salesperson in public place	**7**	7	2	4	6	10	7	7	6	15	*5*
Telephone price comparison service	**5**	4	11	8	5	2	4	9	5	1	*2*
Through supplier's website	**4**	4	-	3	4	4	6	2	4	-	*5*
Written communication	**2**	2	5	*	1	5	2	4	2	6	*1*
Other	**4**	3	8	2	3	7	3	5	4	5	*1*

Source: Ipsos MORI

Expectations of savings on switching

About half of those who have ever switched a fuel are able to give a figure for how much they expected to save on the last occasion when they switched. On average this is £173 per year. Most of those giving answers expect to save over £100. Expectations are highest for the 15-34 age group and lowest for the 65+. There is a strong relationship with social grade: ABs expected to save on average £193, while for social grade E the average is only £112.

The remainder are unable to give an estimated saving. Just 8% claim their most recent switch was about factors other than saving money.

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

	All giving a numerical answer	**Age**			**Social Grade**		
		15-34	35-64	65+	AB	C1	E
Base: all giving numerical answer	*(264)* %	*(49)* %	*(155)* %	*(60)* %	*(74)* %	*(80)* %	*(24)* %
0-£50	**13**	7	12	23	14	8	36
£51-£100	**29**	27	29	32	24	32	39
£101-£200	**37**	42	36	34	39	35	9
£201+	**21**	24	23	11	23	25	16
MEAN	**£173**	£186	£179	£136	£193	£179	£112
Base: All ever switched either fuel	*(550)* %	*(95)* %	*(303)* %	*(152)* %	*(142)* %	*(173)* %	*(52)* %
Not about saving money	**8**	9	8	10	9	9	2
Don't know	**42**	39	40	49	37	44	46

Source: Ipsos MORI

Customers' evaluation of switching

QOF26 **To the best of your knowledge, do you feel that you are now paying less than you would have if you had not switched? (gas)**

	All 2012	Age			Internet Access		Previous survey years (all)		
		15-34	35-64	65+	Yes	No	2008	2010	2011
Base: All who switched gas supplier to save money	*(336) %*	*(51) %*	*(190) %*	*(95) %*	*(298) %*	*(38) %*	*(446) %*	*(461) %*	*(432) %*
Yes	**72**	84	71	65	73	58	*64*	*64*	*62*
No	**17**	10	18	19	16	30	*20*	*14*	*12*
Don't know	**11**	6	10	16	11	12	*15*	*22*	*26*

Source: Ipsos MORI

QOF31. **To the best of your knowledge, do you feel that you are now paying less than you would have if you had not switched? (electricity)**

	All 2012	Age			Previous survey years (all)		
		15-34	35-64	65+	2008	2010	2011
Base: All who switched electricity supplier to save money	*(387) %*	*(58) %*	*(220) %*	*(109) %*	*(516) %*	*(491) %*	*(461) %*
Yes	**73**	78	76	63	*62*	*67*	*64*
No	**13**	15	11	14	*24*	*12*	*11*
Don't know	**14**	7	13	23	*15*	*21*	*25*

Source: Ipsos MORI

This year's survey sees a substantial improvement in the proportion of both gas and electricity switchers (who switched to save money) who believe they are now paying less than they would have if they had not switched. There is also a fall in the proportion who do not know whether they have saved money or not, though it remains highest for the 65+ age group. Among both gas and electricity switchers it is the 15-34 age group who are most likely to feel they have saved money. Among gas switchers those with internet access are much more likely than those without access to believe they have saved money.

QOF27-1. How much do you agree or disagree that: "I found it easy to decide which deal to switch my gas to"						
	All 2012	**Age**			**Previous survey years (all)**	
		15-34	35-64	65+	2010	2011
Base: All with mains gas and responsible for bills who have ever switched gas supplier	*(438) %*	*(73) %*	*(241) %*	*(124) %*	*(589) %*	*(543) %*
Agree	**72**	80	69	73	*72*	*77*
Neither	**9**	11	10	7	*13*	*8*
Disagree	**17**	7	20	18	*14*	*13*
Don't know	**2**	2	2	1	*1*	*2*

Source: Ipsos MORI

QOF32-1. How much do you agree or disagree that: "I found it easy to decide which deal to switch my electricity to"										
	All 2012	**Age**			**Social Grade**		**Tenure**		**Previous survey years (all)**	
		15-34	35-64	65+	AB	DE	Rented	Non-Rented	2010	2011
Base: All with mains electricity and responsible for bills who have ever switched electricity supplier	*(499) %*	*(83) %*	*(278) %*	*(138) %*	*(132) %*	*(117) %*	*(102) %*	*(397) %*	*(633) %*	*(587) %*
Agree	**75**	83	72	76	72	75	76	75	*75*	*77*
Neither	**7**	9	8	3	7	11	14	6	*11*	*8*
Disagree	**16**	6	18	20	21	13	8	18	*13*	*12*
Don't know	**2**	2	2	1	1	1	2	2	*1*	*2*

Source: Ipsos MORI

While most switchers continue to agree that they found it easy to decide which deal to switch to, the proportion for gas switchers is down significantly (by five points to 72%), while the proportion that disagree it is easy is up four points (to 17%). Customers aged 35 or over are most likely to see it is difficult.

Among electricity switchers the proportion that agree it is easy is down only two points compared to last year, which is not statistically significant. However the four-point rise in the proportion disagreeing that the decision was easy is more significant and points to a general feeling that switching decisions are getting harder. While older people (65+) are more likely to disagree that the decision is easy, the same is true of social grade ABs and those who do not rent their homes.

QOF32-2. *"I am confident that I fully understand the key features of the deal I switched to"*

	All 2012	**Area**			**Tenure**		**Previous survey years (all)**	
		Urban	Suburban	Rural	Rented	Non-Rented	2010	2011
Base: All with mains gas and responsible for bills who have ever switched gas supplier	*(438) %*	*(96) %*	*(240) %*	*(102) %*	*(83) %*	*(355) %*	*(589) %*	*(543) %*
Agree	**73**	68	71	82	80	72	*76*	*76*
Neither	**7**	9	6	5	10	6	*10*	*11*
Disagree	**19**	22	23	11	9	22	*12*	*11*
Don't know	**1**	1	*	1	2	*	*1*	*1*

Source: Ipsos MORI

QOF32-2. *"I am confident that I fully understand the key features of the deal I switched to"*

	All 2012	**Social Grade**		**Previous survey years (all)**	
		AB	DE	2010	2011
Base: All with mains electricity and responsible for bills who have ever switched electricity supplier	*(499) %*	*(132) %*	*(117) %*	*(633) %*	*(587) %*
Agree	**74**	76	71	*78*	*77*
Neither	**7**	7	6	*10*	*9*
Disagree	**17**	15	20	*11*	*12*
Don't know	**2**	2	3	*1*	*2*

Source: Ipsos MORI

It is apparent that there has also been a slight fall in confidence that switchers of both gas and electricity fully understand the key features of the deal they switched to. The proportion of gas switchers who disagree that they understand the deal they switched to is up eight points to 19%; among electricity switchers the corresponding figure is 17%, up five points on 2011. Those who rent their homes are more likely to feel confident about their understanding of their gas switching deal than those who do not. Those in rural areas are more likely to agree than those in urban areas. Among electricity switchers those from the AB social grade are more confident than those from the DE group.

QOF27-3. How much do you agree or disagree that:
"I would be confident that if I switched again, I would make the right choice for me"

	All	Age			Social Grade		Internet Access	
		15-34	35-64	65+	AB	DE	Yes	No
Base: All with mains gas and responsible for bills who have ever switched gas supplier	*(438)* %	*(73)* %	*(241)* %	*(124)* %	*(118)* %	*(95)* %	*(389)* %	*(49)* %
Agree	**71**	75	75	59	75	57	73	55
Neither	**9**	5	9	12	6	20	8	19
Disagree	**18**	16	15	27	18	21	17	26
Don't know	**2**	3	1	2	1	2	2	-

Source: Ipsos MORI

QOF32-3. How much do you agree or disagree that:
"I would be confident that if I switched again, I would make the right choice for me"

	All	Age			Social Grade		Internet Access	
		15-34	35-64	65+	AB	DE	Yes	No
Base: All with mains electricity and responsible for bills who have ever switched electricity supplier	*(499)* %	*(83)* %	*(278)* %	*(138)* %	*(132)* %	*(117)* %	*(438)* %	*(61)* %
Agree	**74**	77	77	62	75	64	75	61
Neither	**8**	5	7	10	5	13	6	22
Disagree	**17**	15	14	27	19	20	17	17
Don't know	**2**	3	1	1	1	3	2	-

Source: Ipsos MORI

This year's survey added one further question about future confidence in making the right choice in energy deals. While most agree they are confident, particularly younger people, higher social grades and those with internet access, a significant minority, approaching one in five, are not. These are marginally more likely to be older (65+), of lower social grade (DE) and have no internet access, but these are not conclusive differences.

Trust in openness and transparency of energy suppliers

On balance, energy suppliers are more likely to be distrusted than trusted for their openness and transparency in dealings with consumers. There is some variation by sub-groups however. The net distrust is greatest among social grade AB, the middle age group (35-64) and in Scotland. On the other hand, the 65+ age group, social grade DE and those who rent their homes are all more likely to trust suppliers than to distrust them.

Q39 Using the words on this card/screen, please tell me the extent to which you trust or distrust energy suppliers to be open and transparent in their dealings with consumers?

	Total	**Age**			**Social grade**		**Region**		
		15-34	35-64	65+	AB	DE	England	Scotland	Wales
Base: All with mains gas or electricity who are responsible for bills	*(1,484) %*	*(309) %*	*(773) %*	*(402) %*	*(287) %*	*(417) %*	*(1,267) %*	*(164) %*	*(53) %*
Trust (completely/ tend to)	**34**	35	31	41	27	43	34	30	34
Neither	**26**	26	26	24	27	23	27	11	32
Distrust (completely/ tend to)	**39**	36	42	34	45	30	37	57	34

Source: Ipsos MORI

Household financial stability

QOF35. Which of these statements best applies to you?	All 2012	Tenure		Age			Social Grade		Previous survey years (all)		
		Rented	Non-rented	15-34	35-64	65+	AB	DE	2008	2010	2011
Base: All with either mains gas or electricity who are responsible for bills	*(1,484) %*	*(401) %*	*(1079) %*	*(309) %*	*(773) %*	*(402) %*	*(287) %*	*(417) %*	*(1,539) %*	*(1,554) %*	*(1,525) %*
We are keeping up with all the household bills without any difficulties	**66**	47	72	55	66	75	81	42	*70*	*63*	*62*
We are keeping up with all the household bills, but it is a struggle from time to time	**23**	32	20	27	23	19	15	36	*20*	*25*	*25*
We are keeping up with all the household bills, but it is a constant struggle	**8**	14	6	10	8	4	3	15	*7*	*9*	*8*
We are falling behind with some household bills	**1**	3	*	4	1	-	*	3	*1*	*1*	*1*
We are having real financial problems and have fallen behind with many bills	**1**	1	*	1	*	-	-	2	*2*	*1*	*1*

Source: Ipsos MORI

Appendices

Appendices

Sample Profile

QOF01. Do you have mains gas and/or mains electricity in your home?

	All 2007	All 2008	All 2010	All 2011	All 2012
Base: All respondents	*(2,020) %*	*(2,063) %*	*(1,992) %*	*(1,992) %*	*(1,956) %*
Main gas	78	81	86	85	80
Mains electricity	94	95	95	94	94
Neither/Don't know/Refused	5	9	5	3	3

Source: Ipsos MORI

QOF02. Are you responsible or jointly responsible for the gas or electricity bills in your household?

	All 2007	All 2008	All 2010	All 2011	All 2012
Base: All with mains gas or electricity	*(1,964) %*	*(1,981) %*	*(1,904) %*	*(1,925) %*	*(1,884) %*
Yes	77	75	80	77	79
No	23	25	20	23	21

Source: Ipsos MORI

QOF04. Are you on a dual fuel deal?

	All 2007	All 2008	All 2010	All 2011	All 2012
*Base: All with mains gas and electricity who are responsible for the bill and have same supplier for both (who comprise 87% of all with mains gas **and** electricity who are responsible for bills (2011))*	*(1,964) %*	*(1,005) %*	*(1,144) %*	*(1,138) %*	*(1,066) %*
Yes	-	64	72	74	72
No	-	22	16	15	15

Source: Ipsos MORI

Methods of Payment

QOF08. How do you pay for the gas you use?

	All 2007	All 2008	All 2010	All 2011	All 2012
Base: All those with mains gas who are responsible for the bill	*(1,243) %*	*(1,243) %*	*(1,369) %*	*(1,331) %*	*(1,232) %*
Monthly direct debit	62	65	70	70	69
Pay quarterly in arrears/cheque, cash or card on receipt of bill	23	19	13	14	13
Prepayment meter	8	10	11	11	11
Fuel Direct	*	*	*	0	-
Weekly/fortnightly payment scheme	2	1	1	1	1
Payment card/book ad hoc	3	3	3	2	2
Other	1	1	1	1	2
Don't know	1	1	1	1	2

Source: Ipsos MORI

QOF10.How do you pay for the electricity you use?

	All 2007	All 2008	All 2010	All 2011	All 2012
Base: All those with mains electricity who are responsible for the bill	*(1,516) %*	*(1,519) %*	*(1,540) %*	*(1,500) %*	*(1,461) %*
Monthly direct debit	60	64	68	70	68
Pay quarterly in arrears/cheque, cash or card on receipt of bill	24	19	15	13	13
Prepayment meter	9	11	12	12	12
Fuel Direct	*	*	*	*	-
Weekly/fortnightly payment scheme	2	2	1	1	1
Payment card/book ad hoc	3	3	3	2	2
Other	1	1	*	2	2
Don't know	1	1	1	1	1

Source: Ipsos MORI

Online Tariff

QOF09. Are you on an online tariff, that is, a gas account you have to manage over the internet?

	2010	2011	2012
Base: All who have mains gas and are responsible for the bill	*(1,369) %*	*(1,331) %*	*(1,232) %*
Yes	12	21	22
No	85	75	73
Don't know	3	4	5

Source: Ipsos MORI

QOF11. Are you on an online tariff, that is, an electricity account you have to manage over the internet?

	2010	2011	2012
Base: All who have mains electricity and are responsible for the bill	*(1,540) %*	*(1,500) %*	*(1,461) %*
Yes	12	19	22
No	85	77	73
Don't know	3	3	5

Source: Ipsos MORI

Fixed term tariffs

Q7 Are you on a fixed term tariff?

	2012
Base: All who have mains gas or electricity	*(1,484) %*
Yes	38
No	42
Don't know	21

Source: Ipsos MORI

Amount spent on home energy

Q6. Approximately how much do you spend on home energy, that is electricity and mains gas (if you have it)? (per year)

	All giving numerical answer	Payment method				Social Grade				
		Direct Debit (gas)	PPM (gas)	Direct Debit (elec)	PPM (elec)	AB	C1	C2	D	E
Base: All giving numerical answer	*(1,288)* %	*(712)* %	*(148)* %	*(837)* %	*(185)* %	*(246)* %	*(402)* %	*(271)* %	*(224)* %	*(145)* %
0-£700	20	15	12	18	18	13	19	24	21	30
£701-£1,200	45	46	48	46	48	41	48	50	48	37
£1,201-£1,500	13	16	9	15	9	17	14	14	9	6
£1,501+	22	22	31	20	25	29	19	13	23	27
MEAN	£1,259	£1,263	£1,653	£1,212	£1,506	£1,343	£1,190	£1,122	£1,201	£1,619
Base: All with mains gas or electricity	*(1,484)* %	*(803)* %	*(159)* %	*(946)* %	*(198)* %	*(287)* %	*(459)* %	*(321)* %	*(252)* %	*(165)* %
Don't know	13	11	8	11	7	14	11	15	10	11

Source: Ipsos MORI

Demographics

	2012 Weighted	**2012 Unweighted**
Base: All respondents	*(1,956)* *%*	*(1,956)* *%*
Age		
15-34	32	31
35-64	48	46
65+	20	24
Social Group		
AB	26	18
C1	28	31
C2	22	22
DE	24	28
Region		
England	86	87
Wales	5	4
Scotland	9	9
Area		
Urban	30	33
Suburban	45	46
Rural	25	22
Internet Access		
Yes	85	85
No	15	15
Ethnic Group		
White	89	87
BME	11	13

Toplines

Toplines

Ofgem Switching Omnibus Questionnaire 2012
Topline Results

- This topline shows the results for a face-to-face survey conducted among a representative quota sample of 1,956 residents of Great Britain in the period 2-11 March 2012. Comparisons, where available, are shown with surveys in 2011, 2010 and 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 (most based on all with gas or all with electricity)
- An asterisk (*) represents a value of less than one half or one percent, but not zero

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

	March '08	March '10	January '11	March '12
	%	%	%	%
Yes – Mains electricity	94	95	94	94
Yes – Mains gas	78	86	85	80
No – Neither	2	2	1	2
Don't know	2	1	1	1
Refused	1	2	1	1

Base: All respondents (1,956)

OF2. **Are you responsible or jointly responsible for the gas or electricity bills in your household?**

	March '08	March '10	January '11	March '12
	%	%	%	%
Yes	75	80	77	79
No	25	20	23	21

Base: All who have mains electricity and/or gas (1,884)

OF3. **Do you have the same supplier for both electricity and gas?**

	March '08	March '10	January '11	March '12
	%	%	%	%
Yes	80	84	87	88
No	17	14	12	10
DK/Not sure	3	2	2	2

Base: All who have both mains electricity and gas, and are responsible for bills (1,209)

OF4. **IF YES: Are you on a dual fuel deal?**

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

Base: All with same supplier for both fuels (1,066)

OF5. **IF YES: In the last year have you received information from your supplier about: (2011 wording: "clearer information")**

		January '11	March '12
		%	%
The name of the tariff you are on? (your tariff is the name and rate of the energy plan you pay your energy supplier for)	Yes	42	48
	No	40	37
	DK/Not sure	18	15
Any changes to your tariff?	Yes	45	40
	No	44	48
	DK/Not sure	11	12
The forecast of your energy consumption over the coming year?	Yes	45	44
	No	44	43
	DK/Not sure	11	13

Base: All responsible or jointly responsible for bills (1,484)

OF6. **Approximately how much do you spend on home energy, that is electricity and mains gas (if you have it)? You may answer per year, per month or per week if you prefer, but it needs to be on average for the whole year, including the winter. (Replies translated into annual figures)**

	March '12
	%
0-£700	17
£701-£1200	40
£1201-£1500	12
£1501+	19
Don't know	13
Mean	£1,259

Base: All responsible or jointly responsible for bills (1,484)

OF7. **Are you on a fixed term tariff?**

	March '12
	%
Yes	38
No	42
Don't know	21

Base: All responsible or jointly responsible for bills (1,484)

OF8. **How do you pay for the gas you use?**

	March '08	March '10	January '11	March '12
	%	%	%	%
Monthly Direct Debit	65	70	70	69
Pay by cheque, cash or card on receipt of quarterly bill	19	13	14	13
Prepayment Meter	10	11	11	11
Fuel Direct (where a set amount is deducted from your benefits before you receive them)	*	*	-	-
Weekly/Fortnightly payment scheme	1	1	1	1
Payment card/book that I use whenever I choose (Ad Hoc)	3	3	2	2
Other	1	1	1	2

Don't know	1	1	1	2

Base: All with mains gas and responsible for bill (1,232)

OF9. **Are you on an online tariff, that is, a gas account you have to manage over the internet?**

	March '10	January '11	March '12
	%	%	%
Yes	12	21	22
No	85	75	73
Don't know	3	4	5

Base: All those who have mains gas in their home and are responsible for the bill (1,232)

OF10. **How do you pay for the electricity you use?**

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

Base: All with mains electricity and responsible for bill (1,461)

OF11. **Are you on an online tariff, that is, an electricity account you have to manage over the internet?**

	March '10	January '11	March '12
	%	%	%
Yes	12	19	22
No	85	77	73
Don't know	3	3	5

Base: All with mains electricity and responsible for bill (1,461)

OF12a. **Did you switch your gas supplier in 2011?**

	March '08	March '10	January '11	March '12
	%	%	%	%
Yes	20	17	15	13
No/Don't know	80	83	85	87

Base: All with mains gas and responsible for bill (1,232)

OF12b. **And have you switched your gas supplier so far in 2012?**

	March '12
	%
Yes	4
No/Don't know	96

Base: All with mains gas and responsible for bill (1,232)

OF13. **Did you switch your gas supplier before 2011?**

	March '08	March '10	January '11	March '12
	%	%	%	%
Yes	29	32	30	27
No	71	68	70	73

Base: All who did not switch gas supplier during 2011/12 (1,075)

OF14. **How many times have you ever switched your gas supplier?**

	March '08	March '10	January '11	March '12
	%	%	%	%
Once	53	49	56	44
Twice	26	26	21	19
Three times ("or more" - before 2011)	21	25	12	21
Four times or more			11	15

Base: All ever switched gas supplier (438)

OF15a. **Even though you stayed with the same gas supplier in 2011 and so far in 2012, did you change the tariff you have with them or the method by which you pay them?**

	March '08	March '10	January '11	March '12
	%	%	%	%
Yes/switched either (2012)	9	10	12	12
Yes – changed tariff				9
Yes – changed payment method				4
No	88	88	84	88*
Don't Know	4	2	4	

Base: All not switched gas supplier in 2011/12 (1,075) * No/DK combined in 2012

OF15b. **What method of payment did you change from?**

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

Base: All those who have changed tariff or payment method for gas (113)

OF16a **Did you switch your electricity supplier in 2011?**

	March '08	March '10	January '11	March '12
	%	%	%	%
Yes	19	18	17	14
No/Don't know	81	82	83	86

Base: All who have mains electricity and are responsible for bill (1,461)

OF16b. **And have you switched your electricity supplier so far in 2012?**

	March '12
	%
Yes	3
No/Don't know	97

Base: All who have mains electricity and are responsible for bill (1,461)

OF17. **Did you switch your electricity supplier before 2011?**

	March '08	March '10	January '11	March '12
	%	%	%	%
Yes	26	30	28	24
No	74	70	72	76

Base: All who did not switch electricity supplier in 2011/12 (1,255)

OF18. **How many times have you ever switched your electricity supplier?**

	March '08	March '10	January '11	March '12
	%	%	%	%
Once	55	46	56	44
Twice	23	27	20	22
Three times ("or more" -before 2011)	22	26	14	20
Four times or more			10	15

Base: All ever switched electricity supplier (499)

OF19a. **Even though you stayed with the same electricity supplier in 2011 and so far in 2012, did you change the tariff you have with them or the method by which you pay them?**

	March '08	March '10	January '11	March '12
	%	%	%	%
Yes/ Switched either (2012)	8	8	10	12
Yes – changed tariff				10
Yes – changed payment method				3
No	89	89	86	88*
Don't Know	4	2	3	

Base: All not switched electricity supplier in 2011/12 (1,255) * No/DK combined in 2012

OF19b. **What method of payment did you change from?**

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

Base: All those who have changed tariff or payment method for electricity (134)

Summary 1

	March '07	March '08	March '10	January '11	March '12
	%	%	%	%	%
Ever switched gas supplier	37	43	43	41	37
Ever switched electricity supplier	39	40	42	40	35

Base: All who have each fuel and pay bills (1,232 gas, 1,461 electricity)

Summary 2

	March '07	March '08	March '10	January '11	March '12*
	%	%	%	%	%
Switched either fuel in last year	24	21	19	18	15
Switched either fuel ever	41	45	46	43	38

Base: All with either fuel and pay bills (1,484) *last year = 2011

OF20. **Did you know it was possible to change to a different tariff or method of payment with your current supplier?**

	March '12
	%
Yes	68
No	28
Don't know	5

Base: All those who have never changed gas or electricity tariff (1,139)

OF21. **Did you know it was possible to switch to a different gas or electricity supplier?**

	March '08	March '10	January '11	March '12
	%	%	%	%
Yes	80	83	87	
Yes – knew possible to switch both				79
Yes- electricity but not gas				2
Yes- gas but not electricity				1
No	16	14	10	16
DK/Not sure	4	4	3	3

Base: All never switched either (934)

OF22. **For each of the items on this card could you please say which of them apply to you?**

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

Base: All never switched either (934)

OF23. **Thinking about the <u>last time</u> you switched your gas supplier, what was the main trigger causing you to switch?**

	March '08	March '10	January '11	March '12
	%	%	%	%
Believed new supplier was cheaper/to save money	78	78	79	76
Believed new supplier offered better customer service	6	6	7	5
Believed new supplier offered better benefits (eg loyalty points)		2012 data only		2
Wanted a dual fuel package	3	6	4	5
Wanted a fixed-price deal	2	3	1	2
Wanted a "greener" tariff [4]	1	1	1	*
Wanted an online tariff[5]	0	*	1	0
Written communication from your supplier		2012 data only		*
Moved home#		2012 data only		3
Poor service#		2012 data only		1
Other	7	1	1	1
Don't know	2	2	2	1

Base: All ever switched gas supplier (438) # Codes added post-fieldwork

[1] 2011 wording: ...and I think I'm on a good deal

[2] 2011 wording: I don't think there is much difference...

[3] 2011 wording: I live in a rented house and I don't think my landlord would allow me to switch
[4] "wanted to switch to a "greener" environmentally friendly tariff or supplier" - 2011
[5] 2008 wording: "The attraction of an online tariff"

OF24. **Thinking about the last time you switched gas supplier, how did you find out about the deals offered by the supplier you switched to? [unprompted]**

	March '08	March '10	January '11	March '12
	%	%	%	%
Supplier/representative knocked at my door[1]	41	33	31	23
Used an on-line/website price comparison service (e.g. USwitch, Money Supermarket)	21	26	21	34
New supplier phoned me[2]	7	8	7	6
I spoke to a salesperson in street/shopping centre/public place	-	7	7	10
A friend or family member told me about it	6	7	6	6
I saw an advert	11	5	4	2
I phoned a comparison service	-	4	7	4
I looked at the websites of more than one supplier	-	4	3	3
I rang them only	5	2	3	4
I looked at the supplier's own website only	-	1	4	3
I rang them and other suppliers	4	1	2	3
Written communication or marketing material	2012 data only			1
Other	6	5	5	4
Don't know	4	3	4	4

Base: All ever switched gas supplier (438)

OF25. **Thinking about the last time you switched gas supplier, how did you switch? [unprompted]**

	January '11	March '12
	%	%
On-line price comparison service	16	27
Telephone price comparison service	2	5
Phoning supplier	25	24
Through the supplier's website	4	4
Through a salesperson who knocked at my door	29	24
Through a salesperson in the street/shopping centre/other public place	6	7
Written communication [3]	1	1
Other	2	7
Don't know	6	3

Base: All ever switched gas supplier (438)

[1] They knocked on my door - 2011
[2] They phoned me - 2011
[3] By letter/mail - 2011

OF26. **To the best of your knowledge, do you feel that you are now paying less than you would have if you hadn't switched?**

	March '08	March '10	January '11	March '12
	%	%	%	%
Yes	64	64	62	72
No	20	14	12	17
Don't know/Not sure	15	22	26	11

Base: All ever switched gas supplier to save money (336)

OF27a. **How much do you agree or disagree with the following statements:**
I found it easy to decide which deal to switch my gas to

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

Base: All with gas who have ever switched (438)

OF27b. ***I am confident that I fully understand the key features of the deal I switched to***

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

Base: All with gas who have ever switched (438)

OF27c. ***I would be confident that if I switched again, I would make the right choice for me***

	March '12
	%
Agree strongly	38
Tend to agree	34
Neither agree nor disagree	9
Tend to disagree	12
Disagree strongly	6
Don't know	2

Base: All with gas who have ever switched (438)

OF28. **Thinking about the last time you switched your electricity supplier, what was the main trigger causing you to switch?**

	March '08 %	March '10 %	January '11 %	March '12 %
Believed new supplier was cheaper/to save money	77	77	77	77
Believed new supplier offered better customer service	6	7	7	5
Wanted a dual fuel package	4	6	5	5
Wanted a fixed-price deal	2	4	2	1
Wanted a greener tariff [1]	2	1	2	1
Believed new supplier offered better benefits (eg loyalty points)		2012 data only		2
Written communication from your supplier		2012 data only		*
Wanted an online tariff	0	*	*	*
Moved home#		2012 data only		3
Poor service#		2012 data only		1
New tenant#		2012 data only		*
Was on a meter#		2012 data only		*
Dispute with supplier#		2012 data only		*
Other	6	1	1	1
No answer	-	-	-	1
Don't know	2	1	2	2

Base: All ever switched electricity supplier (499) # Codes added post-fieldwork
* 2008 wording: "The attraction of an online tariff"

OF29. **Thinking about the last time you switched electricity supplier, how did you find out about the deals offered by the supplier you switched to? [unprompted]**

	March '08 %	March '10 %	January '11 %	March '12 %
Used an on-line/website price comparison service (e.g. USwitch, Money Supermarket)	22	27	24	31
Phoned a comparison service	-	3	5	5
Looked at the supplier's own website only	1	2	4	4
Looked at the websites of more than one supplier	-	3	2	3
Supplier representative knocked at my door[2]	41	34	29	22
Spoke to a salesperson in street/shopping centre/public place	-	6	7	7
New supplier phoned me[3]	6	8	9	8
I saw an advert	12	4	5	5
I rang them only	4	2	4	4
I rang them and other suppliers	3	2	2	3
A friend or family member told me about it	5	7	6	5
Written communication or marketing material	2012 data only			1
Other	6	6	5	3
Don't know	5	2	4	3

Base: All ever switched electricity supplier (499)

[1] Wanted to switch to a "greener" environmentally friendly tariff or supplier - 2011
[2] They knocked at my door - 2011
[3] They phoned me - 2011

OF30. **Thinking about the last time you switched electricity supplier, how did you switch? [unprompted]**

	January '11	March '12
	%	%
Online price comparison site	16	25
Telephone price comparison service	2	5
Phoning supplier	28	30
Through supplier's website	5	4
Through salesperson who knocked on my door	28	23
Through a salesperson in the street/shopping centre/other public place	5	7
Written communication[1]	1	2
Other	-	4
Don't know	6	2

Base: All those ever switched electricity supplier (499)

OF31. **To the best of your knowledge, do you feel that you are now paying less than you would have if you hadn't switched?**

	March '08	March '10	January '11	March '12
	%	%	%	%
Yes	62	67	64	73
No	24	12	11	13
Don't know/Not sure	15	21	25	14

Base: All ever switched electricity supplier to save money (387)

OF32a. **How much do you agree or disagree with the following statements:**
I found it easy to decide which deal to switch my electricity to

	March '10	January '11	March '12
	%	%	%
Agree strongly	31	31	39
Tend to agree	43	46	36
Neither agree nor disagree	11	8	7
Tend to disagree	9	8	10
Disagree strongly	4	3	7
Don't know	1	2	2

Base: All with electricity who have ever switched (499)

OF32b. ***I am confident that I fully understand the key features of the deal I switched to***

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

Base: All with electricity who have ever switched (499)

[1] By letter/mail - 2011

OF32c. ***I would be confident that if I switched again, I would make the right choice for me***

	March '12
	%
Agree strongly	40
Tend to agree	34
Neither agree nor disagree	8
Tend to disagree	12
Disagree strongly	6
Don't know	2

Base: All with electricity who have ever switched (499)

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

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

Base: All who have gas or electricity and have changed tariff or payment method in 2011/2012 (174)
Code added post fieldwork

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

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

Base: All who have gas or electricity and have changed tariff or payment method in 2011/2012 (174)

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

	March '12
	%
Online price comparison service	17
Telephone price comparison service	7
Phoning supplier	34
Through the supplier's website	7
Through a salesperson who knocked at my door	11
Through a salesperson in the street/shopping centre/other public place	3
Written communication	6
Other	8
Don't know	7

Base: All who have gas or electricity and have changed tariff or payment method in 2011/2012 (174)

Q36. **What would be the minimum amount of money you would have to save per year in order for it to encourage you to switch your gas or electricity supplier? Just approximately (Converted to annual figures)**

	March '12
	%
Not about saving money – other factors more important	15
0-£50	11
£51-£100	14
£101-£200	13
£201+	10
Refused	2
Don't know	35
Mean	£167

Base: All who have never switched either gas or electricity (934)

Q37. **On the last occasion, when you decided to switch your supplier how much did you expect to save per year? Just approximately. (Converted to annual figures)**

	March '12
	%
Not about saving money – other factors more important	8
0-£50	7
£51-£100	15
£101-£200	18
£201+	10
Refused	-
Don't know	42
Mean	£173

Base: All who have ever switched either gas or electricity (550)

OF38. **Which of these statements best applies to you?**

	March ‘08 %	March ‘10 %	January ‘11 %	March ‘12 %
I am/we are keeping up with all the household bills without any difficulties	70	63	62	66
I am/we are keeping up with all the household bills, but it is a struggle from time to time	20	25	25	23
I am/we are keeping up with all the household bills, but it is a constant struggle	7	9	8	8
I am/we are falling behind with some household bills	1	1	1	1
I am/we are having real financial problems and have fallen behind with many bills	2	1	1	1
Don’t know	0	2	2	2

Base: All with mains electricity or gas and responsible for bills (1,484)

Q39 **Using the words on this card, please tell me the extent to which you trust or distrust energy suppliers to be *open and transparent in their dealings with consumers*?**

	March ‘12 %
Trust completely	6
Tend to trust	28
Neither trust nor distrust	26
Tend to distrust	26
Distrust completely	13
Don’t know	2

Base: All with mains electricity or gas and responsible for bills (1,484)