Customer Engagement with the Energy Market - Tracking Survey 2013

Report prepared for Ofgem

12 June 2013

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Introduction and Methodology

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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 2012, January 2011 and March 2010 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 1-14 March 2013, achieving 1,960 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[1] 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 approx 26 minutes) and the time taken over individual questions in the questionnaire.

[1] **A C**lassification **O**f **R**esidential **N**eighbourhoods : is a geodemographic segmentation of the UK's population. It segments households, postcodes and neighbourhoods into 6 categories, 18 groups and 62 types. By analysing significant social factors and population behaviour, it provides precise information and an in-depth understanding of the different types of people

In 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 1,960 interviews, most of the figures in this report are based on 1,241 gas customers and 1,408 electricity customers. This reflects the fact that we excluded from detailed questioning those people who either did not have mains gas or electricity or who were not responsible (individually or jointly) for paying gas or electricity bills.

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

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

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

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Summary

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Switching supplier

- The proportions of both gas and electricity consumers who switched supplier in the past year have fallen for the fourth year in succession for gas consumers (by two points to 11%) and for the fifth year for electricity consumers (also by two points, to 12%). Low switching rates are noted for BME groups, for standard credit and PPM consumers, for those in rented accommodation and for the 65+ age group. Rural consumers are more likely to have switched their electricity supplier than urban consumers. Internet access is a key facilitator for switching; the rate among those with no access is very low (4% for gas; 5% for electricity).

- The previous downward trend in the proportions who say they have "ever switched" has been arrested – for both fuels it is now 38%, up one point for gas, and up three points for electricity. This may be attributable to the adjusted wording for the question "Did you switch your ...supplier *at any time* before 2012?" which attempts to remind respondents about earlier switches. The "never switched" consumers are more likely to pay by standard credit or PPM, to be from DE social grades, to be from the BME groups, or to rent their homes. They are also more likely to be found in Scotland than in England or Wales.

Switching tariff or method of payment

- The incidence of tariff or method of payment switching has, by contrast, increased this year by four points to 15%, for both fuels. Tariff switching is lower among the same sub-groups as supplier switching, and additionally those with a long term disability are also less likely to have switched tariff. The main method of payment that consumers are switching away from is standard credit, though it is notable that most tariff switches (and supplier switches) do not involve a change of payment method.

- Recent tariff or method of payment switchers say they made the switch primarily to save money, but the proportion giving this response is down four points to 58%. The proportion seeking a fixed price deal is up three points to 8% and switches caused by moving home are up six points to 7%. Consumers who report that they switched tariff or payment method say they found out about it mainly by online price comparison websites and, increasingly this year, by ringing the supplier. Fewer mention the influence of doorstep salespersons. The actual switch is even more likely to have been made by ringing the supplier directly, particularly by the 15-34 age group. .

Awareness and perceptions surrounding switching supplier, tariff or payment method

- Awareness that it is possible to switch energy supplier (among those who have never switched) is up four points to 84%. Being "happy with current supplier" remains the most popular reason for not switching, but at 55% this has declined substantially since last year (down 23 points). While this difference may have been influenced by a marginal change in research methodology, it nevertheless seems likely this reflects a real decline in the proportion who describe themselves as "happy" with their current supplier. Meanwhile perception that there is not enough difference to make switching worthwhile is up four points to 17% and the belief that switching is a hassle is up seven points to 27%.

- Those who have never switched consider they would need to save a minimum of £153 a year on average by switching supplier to be encouraged to do so, a little less than last year.

- Awareness that it is possible to switch tariff or payment method has improved sharply this year (by 14 points) to 82% of those who have not switched tariff/payment method in the past year. Vulnerable groups have generally lower awareness, especially social grade E, and, separately, the same applies to those from BME groups

Experience of switching supplier

- The main trigger for respondents' most recent switch of supplier remains, for both fuels, the prospect of saving money, with no significant changes in patterns of answers since the last tracking survey; subsidiary reasons remain infrequently mentioned. Previously identified trends on sources of information for switching have continued, with more use of online web comparison services and a decline in consulting supplier representatives. Phoning the supplier is now the most frequently used method of making the actual switch for both fuels (29%), having, this year, overtaken online web comparison sites for gas switches, as well as electricity. On the last occasion, switchers expected to save £195 per year on average, a little more than last year, though 40% continue to have no idea how much they expected to save.

- Switchers' evaluations of their last switching experience show some minor change. Just 68% of those who switched gas supplier to save money believe they actually saved money, down four points from last year, though this remains above the 2010/11 level. The corresponding figure for electricity switchers is 70%, down three points, but again ahead of 2010/11. In comparison to last year's survey, consumers are slightly less likely to agree it was easy to decide on the deal to switch to, though most (69%) still rate it as easy. There is no growth in the majorities who express understanding of the key features of the deals or confidence in their ability to make the right choice again.

Attitudes to tariff choices available

- This year, new questions examined attitudes to tariff choices and to communications received from suppliers. Consumers are evenly balanced regarding the perceived difficulty of comparing different tariffs – 37% say they consider it easy and 37% say they consider it difficult. The main substantive reasons given for finding it difficult are the number of tariffs and choices, and the lack of standardised information to facilitate like for like comparisons, though perceived use of technical jargon in communications about tariffs is also mentioned. There is a strong majority who feel there are too many tariffs available – 62% say too many, 20% the right number and 5% too few. Just under half of energy consumers (44%) feel they understand the range of tariffs completely or a fair amount. By contrast, just over half (54%) feel they understand "not very much" or "not at all". The poorest understanding is found among those in rented accommodation, with no internet access, with a disability or from social grade E (state supported).

Information and communications from suppliers

- A small majority of consumers (54%) say they have received information in the past year from their suppliers on the name of their tariff (up six points) and 47% have been given the forecast cost of their consumption (up three points). Recall of notifications about changes to tariffs is unchanged at 40%.

- Eighty percent of energy consumers recall receiving at least one bill or statement of account in the last year; 63% of energy consumers recall an annual statement. Among those not on a fixed term contract for both fuels, 62% recall receiving a price notification letter. Among those on at least one fixed term contract[2], just 32% recall receiving an end of fixed term letter.

- All four communications are at least glanced over by more than eight in ten of those who recall receiving them. Around 40% of recipients read the communication in detail, except in the case of an end of fixed term letter where a majority (53%) say they read it in detail. Reported understanding is similarly high for all four communications – around eight in ten of those who read them agree they understood them. However, as a call to action or even a prompt to consider one's options, the end of fixed term letter has a markedly different effect to the other three communications. Three in five (60%) say the end of fixed term letter made them consider their energy options, while only two in five reported the same effect from the other three communications. Around a quarter agree they took action as a result of the information received in annual statements, bills or statements of account, and in price increase notification letters, rising to nearly half of those receiving the end of fixed term letter (48%). The greater efficacy of end of fixed term letters is apparent across all levels of engagement with the market, though its superiority is much less pronounced among the Disengaged group.

[2] Respondents were asked whether they were "on a fixed term tariff for gas, for electricity or for both". The high proportion (53%) who answered that they were gives cause to speculate that the terminology was not properly understood by many consumers. For example, it is unlikely those classified as "Disengaged", who have never switched supplier, could be on a fixed term tariff, yet the survey shows that 49% claim they are.

Trust in energy suppliers

- Trust in energy suppliers to be open and transparent in their dealings with consumers has slipped lower this year – 29% now tend to trust/completely trust suppliers compared to 34% last year. Distrust is up from 39% to 43%. Only a few minority groups are more likely to trust the energy suppliers on balance: including the BME groups (32% trust; 26% distrust) and those with no internet access (40% trust; 30% distrust). Consumers in Scotland are evenly balanced between trust and distrust.

Incidence of Switching

Q12a. Did you switch your gas supplier in 2012?											
	All 2013	**Payment method**			**Ethnicity**		**Tenure**		**Previous survey years (all)**		
		Monthly/ Quarterly Direct debit	Stand ard credit	PPM (gas)	White	BME	Rent ed	Not rented	2010	2011	2012
Base: All with mains gas who are responsible for the bill	*(1,214)* *%*	*(880)* *%*	*(109)* *%*	*(165)* *%*	*(1,093)* *%*	*(116)* *%*	*(338)* *%*	*(876)* *%*	*(1369)* *%*	*(1331)* *%*	*(1232)* *%*
Yes	**11**	13	9	7	12	4	7	12	17	15	13
No/ Don't know	**89**	87	91	93	88	96	93	88	83	85	87

Source: Ipsos MORI

Q16a. Did you switch your electricity supplier in 2012?											
	All 2013	**Payment method**			**Ethnicity**		**Tenure**		**Previous survey years (all)**		
		Monthly/ Quarterly Direct debit	Stand ard credit	PPM (elec)	White	BME	Ren ted	Not rented	2010	2011	2012
Base: All with mains electricity who are responsible for the bill	*(1,408)* *%*	*(986)* *%*	*(127)* *%*	*(227)* *%*	*(1283)* *%*	*(119)* *%*	*(401)* *%*	*(1007)* *%*	*(1540)* *%*	*(1500)* *%*	*(1461)* *%*
Yes	**12**	13	6	9	12	3	8	13	18	17	14
No/ Don't know	**88**	87	94	91	88	97	92	87	82	83	86

Source: Ipsos MORI

Switching of gas supplier and switching of electricity supplier both declined further in 2012, though the year-on-year decline of two percentage points was not statistically significant in either case. Viewing the year as a continuation of previous trends however, it is apparent that this has been a fourth year of decline for gas customers and a fifth year of decline for electricity customers.

Switching rates continue to be much higher among direct debit customers than among standard credit or PPM customers, for both fuels. There is now no significant difference between standard credit and PPM customers. Ethnicity continues to show a strong contrast: respondents from the white ethnic group are more than twice as likely to have switched their gas supplier, and substantially more likely to have switched their electricity supplier than those from BME groups. Those not in rented accommodation are also more likely to have switched each fuel, while switching among the rented sector is below the national aggregate.

Small differences by country (i.e. England, Scotland, Wales), age and social grade are not significant, with the exception of electricity switching among the 65+ age group (just 8%, which may be linked to the high proportion of the 65+ who have no internet access: 38%), and which is significantly lower than the 35-64 group (13%). There has been some convergence, especially across social grade since last year, when it was a more significant determinant of switching. Gas switching is similarly lower among the 65+ but the smaller sample size of gas customers renders the difference non-significant. Rural consumers are more likely to have switched their electricity supplier than urban consumers. The same is true for rural gas consumers, but the lead over urban gas consumers is not statistically significant.

The proportion of consumers with a long term physical or mental impairment who have switched supplier in 2012 is 8% for each fuel, slightly lower than for those with no such issue (12%), but this is not a statistically significant difference.

Q12a/16a. Did you switch your supplier in 2012? - Effect of Internet Access

	Q12a. Gas Internet Access			**Q16a. Electricity Internet Access**		
	All 2013	Yes	No	All 2013	Yes	No
Base: All with each fuel who are responsible for the bills	*(1,214) %*	*(985) %*	*(229) %*	*(1,408) %*	*(1,132) %*	*(276) %*
Yes	**11**	12	4	**12**	13	5
No	**89**	88	96	**88**	87	95

Source: Ipsos MORI

The availability of internet access continues to be a major factor in the switching of both fuels; those with internet are significantly more likely to have switched. The survey shows that 85% of energy customers have internet access, which is up two points compared to last year. The proportion of gas customers on an online tariff is now 27%, up five points, while the corresponding figure for electricity customers is up three points to 25%.

Q12a/12b/13. Summary Table – Ever switched gas supplier (to March 2013)[3]

	All 2013	Payment method			Social grade		Ethnicity		Tenure		Previous survey years (all)		
		Monthly/ Quarterly Direct debit	Standard credit	PPM (gas)	AB	DE	White	BME	Rent ed	Not rented	2010	2011	2012
Base: All with mains gas who are responsible for the bill	*(1,214) %*	*(880) %*	*(109) %*	*(165) %*	*(279) %*	*(297) %*	*(1,093) %*	*(116) %*	*(338) %*	*(876) %*	*(1,369) %*	*(1,331) %*	*(1,232) %*
Yes	**38**	43	23	22	48	29	40	12	23	42	43	41	37
No	**62**	57	77	78	52	71	60	88	77	58	57	59	63

Source: Ipsos MORI

Q16a/16b/17. Summary Table – Ever switched electricity supplier (to March 2013)[4]

	All 2013	Payment method			Social grade		Ethnicity		Tenure		Previous survey years (all)		
		Monthly/ Quarterly Direct debit	Standard credit	PPM (elec)	AB	DE	White	BME	Rented	Not rented	2010	2011	2012
Base: All with mains electricity who are responsible for the bill	*(1,408) %*	*(986) %*	*(127) %*	*(227) %*	*(324) %*	*(363) %*	*(1,283) %*	*(119) %*	*(401) %*	*(1007) %*	*(1,540) %*	*(1,500) %*	*(1,461) %*
Yes	**38**	43	22	26	49	29	40	14	23	43	42	40	35
No	**62**	57	78	74	51	71	60	86	77	57	58	60	65

Source: Ipsos MORI

[3] In 2012 questionnaire:
Q13 read 'Did you switch your gas supplier before 2011?'In 2013 questionnaire:
Q13 read 'Did you switch your gas supplier at any time before 2012?'
[4] In 2012 questionnaire:
Q17 read 'Did you switch your electricity supplier before 2011?'In 2013 questionnaire:
Q17 read 'Did you switch your electricity supplier at any time before 2012?'

The long term decline in the proportion of customers who say they have **ever** switched supplier to date has reversed this year, possibly due to the small alteration in the question wording to remind respondents that the switch could have been some time ago. It remains to be seen whether it will now stabilise at this level. However there is further evidence in this year's survey that the group within the population who switch at all is continuing to be limited, and that switching activity is increasingly concentrated among a limited sub-group. The proportion of gas switchers who say they have switched four times or more is up a further two points to 17% of all switchers, while those who have switched once have fallen again to 38%. Similarly among electricity switchers, those who say they have switched four times or more are up one point to a new peak of 16%, while those who have switched once have fallen to 42%, the lowest ever measured.

These most frequent switchers are a relatively small group whose sample size does not bear detailed comparative analysis. However, they can be broadly characterised (for both fuels) disproportionately as direct debit payers, aged 35-64, ABC1 social grades, white ethnic group, with internet access and not renting their homes.

Consumers who say they have never switched gas supplier are significantly more likely to pay by standard credit or PPM, to be from the DE (unskilled and state supported) social grades, to be from the BME ethnic groups or to rent their homes. Among electricity consumers the same statistically significant observations can be made, though switching rates among the more disadvantaged groups are marginally above those for gas.

The proportion who say they have ever switched supplier is significantly larger for both fuels in England than in Scotland, but Wales lies between the two. Those with internet access are twice as likely as those without to have switched either fuel. As noted in previous years, those in rural areas are more likely to have ever switched either gas or electricity supplier than those in urban areas. Consumers with a long term physical or mental impairment are marginally less likely to have ever switched either fuel, though the difference is not statistically significant.

Switching tariffs or payment methods

Q15a. Even though you stayed with the same gas supplier in 2012 and so far in 2013, did you change the tariff you have with them or the method by which you pay them?

	All 2013	**Current Payment method**			**Social grade**		**Physical/ Mental Impairment**		**Tenure**		**Previous survey years (all)**		
		Monthly/ Quarterly Direct debit	Standard credit	PPM (gas)	AB	DE	Yes	No	Rented	Not rented	2010	2011	2012
Base: All who did not switch gas supplier in 2012/13	*(1,063) %*	*(758) %*	*(99) %*	*(148) %*	*(238) %*	*(263) %*	*(203) %*	*(860) %*	*(307) %*	*(756) %*	*(1134) %*	*(1127) %*	*(1075) %*
Yes – tariff	**11**	13	7	3	14	8	6	12	7	12	Not asked separately before 2012		9
Yes – payment method	**5**	4	4	9	5	2	5	5	5	5			4
Yes - changed either	**15**	17	11	10	18	10	9	17	88	83	10	12	12
No/Don't know	**85**	83	89	90	82	90	91	83	88	83	90	88	88

Source: Ipsos MORI

Q19a. Even though you stayed with the same electricity supplier in 2012 and so far in 2013, did you change the tariff you have with them or the method by which you pay them?														
	All 2013	**Current Payment method**			**Social grade**		**Physical/ Mental Impairment**		**Tenure**		**Previous survey years (all)**		
		Monthly/ Quarterly Direct debit	Standard credit	PPM (elec)	AB	DE	Yes	No	Rented	Not rented	2010	2011	2012
Base: All who did not switch electricity supplier in 2012/13	*(1,234) %*	*(849) %*	*(119) %*	*(202) %*	*(278) %*	*(324) %*	*(246) %*	*(988) %*	*(364) %*	*(870) %*	*(1273) %*	*(1246) %*	*(1255) %*
Yes – tariff	**10**	12	4	3	12	6	6	10	4	11	Not asked separately before 2012		10
Yes – payment method	**6**	6	4	8	7	5	4	7	8	6			3
Yes – changed either	**15**	17	8	9	18	10	9	16	12	16	8	10	12
No/Don't know	**85**	83	92	91	82	90	91	84	88	84	91	89	88

Source: Ipsos MORI

This year sees a significant increase in the proportion of those who, while not having switched supplier in 2012/13, did switch either their tariff or payment method. Among both gas and electricity consumers this is now 15%, both up three points from last year. The significant increase is in sharp contrast to the continued decline in rates of switching suppliers. Tariff switching is significantly lower among standard credit and PPM consumers, the lower social grades, notably the D (unskilled) category, those who rent their homes and among those with long term disability.

Those switching supplier in 2012/13 were asked in a new question if they also switched payment method at the same time. Among gas supplier switchers, just 15% switched their payment method at the same time; among electricity supplier switchers the proportion was 16%.

All those who switched tariff or payment method in the past year (whether at the same time as switching supplier or not) were asked what method they changed from. The sample size is a little small to be definitive about the direction of change because very few of the switches involved an actual change of payment method: 72% of gas tariff switchers and 66% of electricity tariff switchers did not actually change their payment method when they switched tariff. The most frequently observed change of payment method is from standard credit to direct debit, for both fuels. Small numbers can also be noted dropping out of direct debit into PPM, and from quarterly direct debit to monthly direct debit.

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 2013	Social grade				Ethnicity		Previous survey (all)
		AB	C1	C2	DE	White	BME	2012
Base: All changed tariff/payment method in 2012/13	*(219) %*	*(60) %*	*(67) %*	*(53) %*	*(39) %*	*(198) %*	*(19) %*	*(174) %*
Believed new tariff or method was cheaper/ to save money	**58**	59	64	49	54	60	43	62
Wanted a fixed price[5] deal	**8**	2	10	13	10	8	8	5
Moved home	**7**	4	6	8	15	6	17	1
Believed new tariff or method offered better benefits	**6**	11	3	4	4	7	-	7
Wanted a dual fuel package	**4**	3	3	9	1	3	3	3

Source: Ipsos MORI

The main trigger for switching tariff or payment method is to save money. This proportion is down a little from last year. A move to fixed price is also marginally more frequently mentioned this year, though is scarcely mentioned by AB social grades. Moving home is another notable trigger and this is a significant issue for the DE social grades and for BME consumers. The AB social grades, on the other hand, are disproportionately more likely to mention that a new tariff appeared to offer better benefits.

[5] See earlier footnote regarding caution over consumer understanding of “fixed term tariff”, which may also relate to understanding of “fixed price”

Q34. How did you find out about the tariff or payment method you changed to?	All	Social Grade				Age			Internet Access		All
		AB	*C1*	*C2*	*DE*	15-34	35-64	65+	Yes	No	2012
Base: All changed tariff or payment method in 2012/13	*(219) %*	*(60) %*	*(67) %*	*(53) %*	*(39) %*	*(32) %*	*(114) %*	*(73) %*	*(184) %*	*(35) %*	*(174) %*
Used online/ website price comparison service	**24**	32	26	26	4	26	27	17	27	6	26
I rang them (only)	**17**	21	19	7	16	24	18	9	17	12	7
They phoned me	**8**	5	8	12	9	2	8	13	7	15	8
Supplier representative knocked at my door	**8**	5	2	12	18	2	9	8	8	6	12
Written communication or marketing material	**7**	11	6	3	7	2	7	10	8	5	13
Rang them and other suppliers	**5**	2	4	10	6	11	3	5	5	5	2
Friend or family member told me	**4**	4	4	5	5	11	2	6	3	14	3
I saw an advert	**4**	2	6	5	5	9	2	5	5	-	2
Phoned a comparison service	**4**	-	5	3	7	6	3	3	2	12	7
Looked at supplier's own website only	**4**	3	9	-	-	-	5	3	4	-	4
Spoke to a salesperson in street/ shopping centre	**3**	2	2	8	3	3	3	3	4	-	5
Looked at websites of more than one supplier	**2**	2	-	-	7	4	1	3	2	-	5
Other	**8**	6	8	10	8	-	9	10	6	20	5
Don't know	**5**	6	5	4	5	10	3	7	4	11	7

Source: Ipsos MORI

Consumers who switched tariff or payment method in 2012/13 used, between them, a wide range of sources to find out about the tariff. Online price comparison websites are most frequently mentioned, though the DE social grades are notably less likely to use them. There is an increase in the proportion who called their own supplier to find out about tariff change (up 10 points to 17%). This now outweighs the proportion called by the supplier and is more likely to involve the ABC1 and DE social grades, as well as younger people (15-34). Those with internet access are more likely to have called the supplier than those without. A small (and falling) proportion was prompted to change tariff or payment method with their existing supplier following an encounter with a doorstep sales person.

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

	All 2013	Social Grade		Age			Internet Access		Previous survey (all)
		AB	*DE*	15-34	35-64	65+	Yes	No	2012
Base: All changed tariff or payment method in 2012/13	*(219) %*	*(60) %*	*(39) %*	*(32) %*	*(114) %*	*(73) %*	*(184) %*	*(35) %*	*(174) %*
Phoning supplier	**42**	38	49	64	34	46	42	43	34
Online price comparison service	**20**	30	4	8	27	11	22	3	17
Through a salesperson who knocked at my door	**10**	3	23	11	10	10	10	12	11
Telephone price comparison service	**5**	2	4	-	3	10	3	13	7
Through suppliers' website	**4**	4	-	3	6	3	5	-	7
Written communications	**4**	4	5	-	3	9	3	8	6
Through a salesperson in street/shopping centre	**3**	4	-	3	4	1	4	-	3
Other	**7**	7	13	2	10	6	6	15	8
Don't know	**4**	6	1	9	3	4	4	6	7

Source: Ipsos MORI

The actual switch of tariff or payment method is even more likely this year to have been made by phoning the supplier – the proportion is up eight points to 42%. The 15-34 age group is particularly likely to have used this method. Making the switch via an online comparison service is next most popular method, and also marginally more frequently mentioned this year. The AB social grade, 35-64 year olds and – perhaps unsurprisingly - those with internet access are most likely to have used this route. One in ten switched via a doorstep salesman, as in the previous survey.

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

	Total 2013	Method of Payment (electricity)			Social Grade			Ethnicity		Previous survey (all)
		Monthly/ Quarterly Direct Debit	*Stand ard Credit*	*PPM (elec)*	AB	C1	E	White	BME	2012
Base: All who have not changed gas or electricity tariff/payment method in 2012/13	*(1,241) %*	*(814) %*	*(113) %*	*(204) %*	*(270) %*	*(340) %*	*(158) %*	*(1,105) %*	*(105) %*	*(1139) %*
Yes – knew possible to change tariff	**34**	37	36	26	39	31	26	35	23	-
Yes – knew possible to change method of payment	**5**	5	9	5	6	6	6	5	6	-
Yes – knew possible to change both	**43**	43	43	42	43	46	35	44	29	-
No	**17**	15	11	27	11	17	32	15	42	28
Don't know	**1**	*	*	-	1	*	*	1	-	5
All who knew possible to switch either tariff or payment method for either fuel	**82**	84	88	73	88	83	68	84	58	68

Source: Ipsos MORI

As questions differed in their wording this year it makes precise comparison difficult, but it is nevertheless clear that awareness of the possibility of tariff or method of payment switching is sharply increased this year. In 2012, 68% of those who had not changed tariff or payment method in the past year said they were aware they could. This is now increased by 14 points to 82%. The new question format allows us to identify that consumers are more likely to know about the possibility of tariff change, than specifically payment method change.

Awareness of the possibility of tariff or payment method change is significantly lower among “vulnerable” groups, notably PPM consumers (especially gas PPM, 68%, though electricity PPM is also significantly lower at 73%), state-supported social grade E and those who rent their homes. Awareness is also lower among the BME groups.

Knowledge and Preconceptions about Switching

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

	Total	Area			Social grade			Ethnicity		Previous surveys (all)		
	2013	Urban	Sub-urban	Rural	AB	C2	DE	*White*	BME	2010	2011	2012
Base: All responsible for bills who have never switched gas or electricity supplier	*(882) %*	*(433) %*	*(229) %*	*(220) %*	*(160) %*	*(219) %*	*(261) %*	*(773) %*	*(105) %*	*(847) %*	*(875) %*	*(934) %*
Yes to both	**77**	67	88	82	82	76	73	79	55	Not asked before 2012	-	79
Yes – Electricity not gas	**2**	3	1	2	3	1	2	2	-	-	-	2
Yes – Gas not electricity	**5**	6	4	5	5	5	5	5	6	-	-	1
Yes (to either elec or gas)	**84**	75	93	89	90	82	79	87	61	83	87	80
No	**16**	24	6	10	9	17	21	13	39	14	10	16
Don't know	**1**	*	1	*	1	1	-	1	-	4	3	3

Source: Ipsos MORI

The proportion of those consumers who say they have never switched energy supplier who are currently aware that it is possible to switch supplier for either fuel is up four points to 84% but remains short of its 87% peak in 2011.

Those unaware of the possibility of switching supplier are most likely to be found in urban areas, among the DE social grades and among BME groups.

Q22. For each of the items here, could you please say which of them, if any, apply to you?	Total 2013	Age			Social grade		Tenure		Previous surveys (all)	
		15-34	35-64	65+	AB	E	Rented	Not rented	2011	2012
Base: All responsible for bills but have never switched gas or electricity supplier	(882) %	(178) %	(415) %	(289) %	(160) %	(123) %	(310) %	(572) %	(875) %	(934) %
I'm happy with my current supplier(s)	**55**	43	56	63	55	46	46	59	77	78
Switching is a hassle	**27**	28	30	23	32	27	27	28	22	20
I don't think there's any difference between suppliers to make switching worthwhile[6]	**17**	18	15	21	19	20	16	17	20	13
I've checked prices of other suppliers and I think I'm on the best deal[7]	**12**	15	12	8	12	10	10	12	13	9
I am unsure where to get info to help me make a good choice	**6**	5	6	5	8	7	2	7	4	2
I wouldn't know how to switch even if I wanted to	**4**	5	3	5	3	9	4	4	2	3
I live in rented accommodation and I don't think my landlord would allow me to switch[8]	**3**	7	2	1	1	7	7	1	3	3
My supplier has told me I can't switch	**2**	2	1	3	1	1	1	2	-	1
I am in debt with my current supplier so I don't think I can switch	**2**	2	2	*	-	6	3	1	1	1

Source: Ipsos M

While te pattern of reasons for not having switched is similar to last year there are some notable trends for key statements. This question was previously asked with a paper showcard, showing the options in two alternative orders. In 2013 the method was altered to showing options on screen in random order. It is possible this has affected the way respondents answer, but the effect is likely to be, in our view, no more than marginal. While "happy with current supplier" is the principal explanation still, mentions of this are down 23

[6] 2011 wording: I don't think there is much difference
[7] 2011 wording: ...and I think I'm already on a good deal
[8] 2011 wording: I live in a rented house and I don't think my landlord would allow me to switch

points since last year, after having been unchanged since 2011. Since no other responses show such variation it is more likely this is a real change in opinion, rather than simply a result of altering the questioning method.

At the same time the proportion who believe “switching is a hassle” is up seven points, differing substantially from the last two surveys. There are also increasing indications that consumers feel there is no point in switching – the proportion who believe “there isn’t any difference between supplier to make switching worthwhile” is up four points and those who say they have checked prices and believe they are on the best deal are up three points, though both remain fairly low in absolute terms. While only 6% say they are “unsure where to get information to help me make a good choice”, this does represent a four-point rise from last year.

Those most likely to be happy with their current supplier are the 65+ age group, the AB social grades and those who do not rent their homes. The 65+ age group also show most scepticism about the differences between suppliers.

Q36. What would be the minimum amount of money you would have to save per year in order for it to encourage you to switch your gas or electricity supplier?										
	Total	**Age**			**Social grade**			**Internet Access**		**All**
		15-34	35-64	65+	AB	C1	DE	*Yes*	No	2012
Base: All never switched supplier giving numerical answer	*(419)* *%*	*(96)* *%*	*(214)* *%*	*(109)* *%*	*(78)* *%*	*(131)* *%*	*(111)* *%*	*(345)* *%*	*(74)* *%*	*(412)* *%*
0-£50	**28**	39	21	34	20	30	36	27	34	23
£51-100	**31**	36	27	35	30	32	31	29	46	30
£101-£200	**26**	17	33	18	31	27	19	27	17	26
£201+	**15**	8	19	13	19	11	15	17	3	20
MEAN	**£153**	£116	£173	£148	£168	£136	£140	£162	£95	£167
Base: All never switched supplier	*(882)* *%*									*(943)* *%*
Not about saving money	**12**	5	12	19	12	10	13	10	20	15
Don't know	**36**	37	33	42	32	32	40	34	42	35
Refused	**2**	2	2	2	2	1	3	2	2	2

Source: Ipsos MORI

Half of non-switchers are able to give an approximate minimum that they would want to save per year that would encourage them to switch supplier. Among these, the mean required saving is £153 per year, which represents a slight fall compared to last year's figure. Most (59%) state the minimum saving as up to £100 a year. The 35-64 age group have the highest expectations of savings. The same is true of the AB social grades. The lowest expectations are found among those with no internet access (£95) and those in Scotland, for whom the mean is £87, compared to £162 in England and £160 in Wales.

The group who state it is "not about saving money" is slightly smaller this year (12%). They are composed disproportionately of rural consumers, those with no internet access, standard credit consumers and the 65+ age group.

Reasons for switching on last occasion

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

	All 2013	Payment method			Age			Previous surveys (all)		
		Monthly/ Quarterly Direct debit	Standard credit	PPM (gas)	15-34	35-64	65+	2010	2011	2012
Base: All with mains gas and responsible for bill who have ever switched gas supplier	*(440)* %	*(365)* %	*(28)* %	*(37)* %	*(53)* %	*(247)* %	*(140)* %	*(589)* %	*(543)* %	*(438)* %
Believed new supplier to be cheaper/to save money	**75**	75	58	84	70	75	78	78	79	76
Believed new supplier offered better customer service	**6**	6	20	4	9	5	7	6	7	5
Moved home	**6**	5	5	7	12	6	1	-	-	3
Wanted to switch to a dual fuel package	**4**	4	-	4	-	5	2	6	4	5
Wanted a fixed price deal	**2**	2	5	-	-	2	4	3	1	2
Believed new supplier offered better benefits	**1**	1	5	-	4	1	1	-	-	2
Salesman calling at house	**1**	2	-	-	2	1	1	-	-	-
Wanted a greener tariff	**1**	1	-	-	-	2	-	1	1	1
Dispute with supplier	*****	*	-	-	2	-	-	-	-	-
Poor service	*****	*	-	-	-	1	-	-	-	-
Wanted an online tariff	*****	*	-	-	-	*	-	-	1	*
Written communication from your supplier	**-**	-	-	-	-	-	-	-	-	*
Other	**2**	2	3	-	-	1	4	1	6	3
Don't know	**1**	*	3	1	-	*	2	-	-	-

Source: Ipsos MORI

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

	All 2013	Payment Method			Age			Previous surveys (all)		
		Monthly/ Quarterly direct debit	Stand ard credit	PPM (elec)	15-34	35-64	65+	2010	2011	2012
Base: All with mains electricity and responsible for bill who have ever switched gas supplier	*(510) %*	*(362) %*	*(30) %*	*(57) %*	*(60) %*	*(279) %*	*(171) %*	*(633) %*	*(587) %*	*(499) %*
Believed new supplier to be cheaper/to save money	**76**	77	54	84	66	77	78	77	77	77
Moved home	**5**	4	5	12	13	5	1	-	-	3
Believed new supplier offered better customer service	**5**	4	22	2	6	4	7	6	5	5
Wanted a dual fuel package	**4**	4	6	-	2	5	3	7	5	5
Wanted a fixed price deal	**2**	2	5	2	1	3	2	4	2	1
Wanted a greener tariff	**1**	2	-	-	2	2	-	1	2	*
Believed new supplier offered better benefits	**1**	1	5	-	2	1	-	-	-	2
Salesman calling at house	**1**	1	-	-	2	1	1		-	-
Dispute with supplier	**1**	1	-	-	2	1	1		-	-
Poor service	**1**	1	-	-	2	*	1		-	-
Written communication from your supplier	*****	*	-	-	-	*	1	-	-	*
Other	**2**	1	2	-	2	1	4	1	6	2
Don't know	*****	*	3	1	-	*	1	-	-	-

Source: Ipsos MORI

The pattern of reasons given for switching shows very little change again this year, for either fuel. Saving money continues to dominate as the chief motivator.

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 2013	Social Grade		Age			Physical/ Mental Impair ment		Internet Access		Previous surveys (all)		
		AB	E	15-34	35-64	65+	*Yes*	*No*	Yes	No	2010	2011	2012
Base: All with mains gas and responsible for bill who have ever switched gas supplier	*(440) %*	*(118) %*	*(41) %*	*(53) %*	*(247) %*	*(140) %*	*(74) %*	*(366) %*	*(392) %*	*(48) %*	*(589) %*	*(543) %*	*(438) %*
Online/website price comparison service	**35**	40	11	39	38	25	20	38	37	11	26	21	34
Supplier representative knocked at my door	**19**	13	48	7	19	25	24	18	18	29	33	31	23
Salesperson in public place	**7**	4	6	11	7	4	7	7	7	6	7	7	10
Looked at websites of more than one supplier	**7**	10	-	9	7	4	9	6	7	-	4	3	3
Friend or family member	**6**	1	4	17	3	5	6	6	5	13	7	6	6
New supplier phoned me	**5**	4	13	1	4	8	5	5	4	13	8	7	6
I rang them (only)	**4**	3	2	3	3	6	5	3	4	3	2	3	4
Phoned comparison service	**4**	5	1	2	3	6	-	4	3	5	4	7	4
I rang them and other suppliers	**3**	3	5	-	4	4	3	3	3	7	1	2	3
Looked at supplier's own website only	**3**	5	3	3	3	2	2	3	3	-	1	4	3
I saw an advert	**3**	2	1	3	2	4	5	2	3	4	5	4	2
Written communication or marketing material	**1**	*	1	-	1	3	4	1	1	2	-	-	1
Through a collective (group) switching campaign	**1**	3	2	1	1	3	1	1	2	-	-	-	-
Other	**7**	8	8	10	7	5	8	7	7	5	5	5	4
Don't know	**2**	3	-	2	2	3	3	2	2	2	3	4	4

Source: Ipsos MORI

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

	All 2013	Social Grade		Age			Physical/ Mental Impair-ment		Internet Access		Previous surveys (all)		
		AB	E	15-34	35-64	65+	*Yes*	*No*	Yes	No	2010	2011	2012
Base: All with mains electricity and responsible for bill who have ever switched electricity supplier	*(510) %*	*(188) %*	*(47) %*	*(60) %*	*(279) %*	*(171) %*	*(84) %*	*(426) %*	*(453) %*	*(57) %*	*(633) %*	*(583) %*	*(499) %*
Online/website price comparison service	**37**	45	11	39	43	22	26	39	40	12	27	24	31
Supplier representative knocked at my door	**17**	11	41	9	18	19	21	16	16	19	34	29	22
Salesperson in public place	**7**	5	8	11	6	6	11	6	7	6	6	7	7
Friend or family member	**6**	3	5	15	3	9	7	6	5	23	7	6	5
I rang them (only)	**5**	4	4	4	5	5	6	5	5	3	2	4	4
Looked at the websites of more than one supplier	**5**	8	-	8	4	4	4	5	5	-	3	2	3
New supplier phoned me	**4**	4	7	-	4	7	2	4	3	11	8	9	8
Phoned comparison service	**4**	3	1	2	4	5	3	4	4	6	3	5	5
I rang them and other suppliers	**4**	3	10	3	4	4	3	4	4	6	2	2	3
I saw an advert	**3**	4	-	6	2	5	4	3	3	3	4	5	5
Written communication or marketing material	**3**	4	5	2	2	4	6	2	3	3			1
Looked at supplier's own website	**2**	2	3	1	1	3	-	2	2	-	2	4	4
Through a collective (group) switching campaign	**1**	2	2	-	1	1	1	1	1	-	-	-	-
Other	**7**	6	6	11	5	9	7	6	7	4	6	5	3
Don't know	**2**		-	2	2	4	2	2	2	5	2	4	3

Source: Ipsos MORI

There are continuations of some of the trends identified last year with regard to how switchers found out about the deals available. The use of online price comparison websites continues to grow for both fuels. At the same time the influence of salespersons continues to lessen, both on the doorstep and in other places. The source of information that shows a notable, though as yet small, increase in influence is looking at the websites of many suppliers. Collective switching schemes, included for the first time this year, have not yet made an impression on the market.

Use of online price comparison websites is significantly lower for the 65+ age group, and they significantly more likely to use doorstep salespersons (in the case of gas only. For electricity there is no significant difference from the 35-64 age group on this latter measure). A similar pattern emerges for those with a disability, and there is a relationship with social grade. Those graded AB and C1 are more likely to use online price comparison sites than other social grades, especially social grade E, while the DE grades are significantly more likely to use doorstep sales persons.

Having no internet access oneself is not always a barrier to using online price comparison services; 11% of gas switchers with no internet access, and 12% of electricity switchers with no internet access used comparison sites to find out about the deals available. However, switchers with no access to the internet did not look at any other supplier websites.

Method used to make the last switch

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

	All 2013	**Payment Method**		**Age**			**Social Grade**		**Internet Access**		**Previous survey (all)**
		Monthly/ Quarterly Direct Debit	Standard credit	15-34	35-64	65+	AB	DE	Yes	No	2012
Base: All with mains gas and responsible for bill who have ever switched gas supplier	*(440) %*	*(365) %*	*(37) %*	*(53) %*	*(247) %*	*(140) %*	*(133) %*	*(84) %*	*(392) %*	*(48) %*	*(438) %*
Phoning supplier	**29**	29	32	35	27	30	29	25	28	37	24
Online/website price comparison service	**26**	28	6	25	31	11	32	12	28	3	27
Through a salesperson who knocked at my door	**19**	17	27	10	19	24	12	33	18	34	24
Through salesperson in public place	**7**	6	5	13	7	3	6	10	7	4	7
Through the supplier's website	**5**	5	-	6	4	4	7	3	5	-	4
Telephone price comparison service	**4**	4	8	-	5	5	4	7	4	7	5
Written communications	**2**	2	-	-	2	5	2	-	2	2	1
Through a collective (group) switching campaign	**1**	1	-	-	1	2	2	-	1	-	-
Other	**5**	5	12	10	3	8	3	8	3	2	7

Source: Ipsos MORI

Q30. Thinking about the last time you switched your electricity supplier, how did you switch?											
	All 2013	**Payment Method**		**Age**			**Social Grade**		**Internet Access**		**Previous survey (all)**
		Monthly/ Quarterly Direct Debit	Standard credit	15-34	35-64	65+	AB	DE	Yes	No	2012
Base: All with mains electricity and responsible for bill who have ever switched electricity supplier	*(510) %*	*(414) %*	*(30) %*	*(60) %*	*(279) %*	*(171) %*	*(156) %*	*(99) %*	*(453) %*	*(57) %*	*(499) %*
Phoning supplier	**29**	29	42	33	26	35	29	26	28	46	30
Online/website price comparison service	**26**	29	10	24	32	13	31	12	28	6	25
Through a salesperson who knocked at my door	**17**	15	19	7	18	19	12	31	17	19	23
Through salesperson in public place	**7**	6	6	15	5	6	4	8	6	9	7
Telephone price comparison service	**3**	3	7	1	4	3	2	6	3	3	5
Through supplier's website	**6**	7	4	6	7	5	10	3	7	-	4
Written communications	**3**	3	-	-	2	5	4	3	3	5	2
Through a collective (group) switching campaign	**1**	1	-	-	1	2	2	-	1	3	-
Other	**5**	4	9	13	3	6	3	10	5	9	4

Source: Ipsos MORI

Doorstep salespersons continue to decline as the final means of making switches, though salespersons in public places also have a (minor) role. Switchers report they are most likely to phone the new supplier to make the switch, though using online price comparison websites is a close second.

Phoning the supplier is more popular amongst those on standard credit and with no internet access. Among gas switchers it is also more popular among the 15-34 age group. Use of price comparison websites is preferred by the AB social grades and those on direct debit. Doorstep salespersons are more likely to have a role in the case of the DE social grades, the 65+ age group and those on standard credit.

Expectations of savings on switching

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

	All giving a numerical answer in 2013	Age			Social Grade		Previous survey (all)
		15-34	35-64	65+	AB	E	2012
Base: all ever switched giving numerical answer	*(261) %*	*(36) %*	*(149) %*	*(76) %*	*(71) %*	*(20) %*	*(264) %*
0-£50	**16**	16	14	21	16	6	13
£51-£100	**35**	33	34	41	32	47	29
£101-£200	**34**	38	35	30	38	22	37
£201+	**15**	14	17	9	15	24	21
MEAN	**£195**	£156	£229	£125	£166	£201	£173
Base: All ever switched either fuel	*(551) %*	*(65) %*	*(302) %*	*(184) %*	*(170) %*	*(52) %*	*(550) %*
Not about saving money	**11**	14	12	6	14	15	8
Don't know	**40**	29	38	52	44	40	42

Source: Ipsos MORI

As in the previous survey, about half of all who have ever switched supplier are able to estimate how much they expected to save per year and 40% did not know. On average they expected to save £195, which is a little more than estimated last year (£173). Around half of those giving answers (49%) expect to save over £100; 84% expect to save over £50. Sample sizes of sub-groups are mostly too small to show decisive differences; small sample sizes can give rise to widely varying average figures.

Fifty-one percent of switchers are unable to give an estimate of their expectations, which includes 11% who said it was "not about saving money". This proportion is up three points since 2012, though this is not a significant increase.

Customers' evaluation of switching

Q26. To the best of your knowledge, do you feel that you are now paying less than you would have if you had not switched? (gas)

	All 2013	Area			Previous surveys (all)		
		Urban	Sub urban	Rural	2010	2011	2012
Base: All who switched gas supplier to save money	*(328) %*	*(135) %*	*(93) %*	*(100) %*	*(461) %*	*(432) %*	*(336) %*
Yes	**68**	64	63	79	64	62	72
No	**19**	23	16	17	14	12	17
Don't know	**13**	13	21	4	22	26	11

Source: Ipsos MORI

Q31. To the best of your knowledge, do you feel that you are now paying less than you would have if you had not switched? (electricity)

	All 2013	Area			Previous surveys (all)		
		Urban	Sub urban	Rural	2010	2011	2012
Base: All who switched electricity supplier to save money	*(384) %*	(146) %	(112) %	(126) %	*(491) %*	*(461) %*	*(387) %*
Yes	**70**	66	68	76	67	64	73
No	**20**	24	15	20	12	11	13
Don't know	**10**	10	16	4	21	25	14

Source: Ipsos MORI

The proportion of both gas and electricity switchers (who switched to save money) who believe they are now genuinely paying less than they would have remains above 2010/11 levels, but have both slipped a little in the past year. The proportion confident of having saved money on switching their supplier is higher among rural consumers than in urban areas, for both gas and electricity switchers. There are few other variations of any note by demographic or behavioural sub-groups.

Q27-1. How much do you agree or disagree that: *"I found it easy to decide which deal to switch my gas to"*						
	All	**Area**		**Previous surveys (all)**		
	2013	Urban	Rural	2010	2011	2012
Base: All with mains gas and responsible for bills who have ever switched gas supplier	*(440)* %	*(185)* %	*(136)* %	*(589)* %	*(543)* %	*(438)* %
Agree	**69**	64	70	72	77	72
Neither	**11**	11	13	13	8	9
Disagree	**19**	24	17	14	13	17
No opinion/ Don't know	*****	1	-	1	2	2

Source: Ipsos MORI

Q32-1. How much do you agree or disagree that: *"I found it easy to decide which deal to switch my electricity to"*						
	All	**Area**		**Previous surveys (all)**		
	2013	Urban	Rural	2010	2011	2012
Base: All with mains electricity and responsible for bills who have ever switched electricity supplier	*(510)* %	*(198)* %	(175) %	*(633)* %	*(587)* %	*(499)* %
Agree	**68**	68	66	75	77	75
Neither	**12**	10	13	11	8	7
Disagree	**19**	21	20	13	12	16
No opinion/ Don't know	*****	1	-	1	2	2

Source: Ipsos MORI

While a majority continue to agree it was easy to decide which deal to switch to, this year's figures show a decline in this proportion (in the case of gas switchers, down three points) and especially electricity switchers (down seven points) and disagreement has increased marginally in both cases.

Unlike last year, there are few significant differences in agreement by sub-group. Gas switchers in rural areas are more likely to agree it was easy to decide than were those in urban areas, but the same is not true of electricity switchers.

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

	All 2013	Area			Tenure		Previous surveys (all)		
		Urban	Suburban	Rural	Rented	Not rented	2010	2011	2012
Base: All with mains gas and responsible for bills who have ever switched gas supplier	*(440) %*	*(185) %*	*(119) %*	*(136) %*	*(77) %*	*(363) %*	*(589) %*	*(543) %*	*(438) %*
Agree	**72**	73	74	69	71	72	76	76	73
Neither	**10**	11	6	11	9	10	10	11	7
Disagree	**18**	16	20	20	19	18	12	11	19
No opinion/ Don't know	**-**	-	-	-	-	-	1	1	1

Source: Ipsos MORI

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

	All 2013	Social Grade		Previous surveys (all)		
		AB	DE	2010	2011	2012
Base: All with mains electricity and responsible for bills who have ever switched electricity supplier	*(510) %*	*(156) %*	*(99) %*	*(633) %*	*(587) %*	*(499) %*
Agree	**73**	73	74	78	77	74
Neither	**10**	10	9	10	9	7
Disagree	**17**	17	17	11	12	17
No opinion/ Don't know	**-**	-	-	1	2	2

Source: Ipsos MORI

Most switchers of either fuel say that they fully understand the key features of the deal they switched to. There is no significant difference in the findings compared to those of last year.

Variations by sub-group this year show no significant differences, even on criteria that were notable last year, such as social grade and home tenure.

Q27-3. How much do you agree or disagree that:

"I would be confident that if I switched again, I would make the right choice for me"

	All 2013	Age			Social Grade		Internet		Previous survey (all)
		15-34	35-64	65+	AB	DE	Yes	No	2012
Base: All with mains gas and responsible for bills who have ever switched gas supplier	*(440) %*	*(53) %*	*(247) %*	*(140) %*	*(133) %*	*(84) %*	*(392) %*	*(48) %*	*(438) %*
Agree	**70**	71	70	72	68	70	71	65	71
Neither	**15**	19	16	9	14	22	15	14	9
Disagree	**14**	10	14	18	17	8	14	21	18
No opinion/ Don't know	*****	-	-	1	-	-	*	-	2

Source: Ipsos MORI

Q32-3. How much do you agree or disagree that:

"I would be confident that if I switched again, I would make the right choice for me"

	All 2013	Age			Social Grade		Internet access		Previous survey (all)
		15-34	35-64	65+	AB	DE	Yes	No	2012
Base: All with mains electricity and responsible for bills who have ever switched electricity supplier	*(510) %*	*(60) %*	*(279) %*	*(171) %*	*(156) %*	*(99) %*	*(453) %*	*(57) %*	*(499) %*
Agree	**72**	74	73	69	73	69	72	71	74
Neither	**13**	13	12	16	13	17	13	18	8
Disagree	**15**	13	15	15	14	13	15	10	17
No opinion/Don't know	**-**	-	-	-	-	-	-	-	2

Source: Ipsos MORI

Seven in ten switchers of either fuel are confident that they would make the right choice for them if they switched again. This is highly consistent with last year's findings, with no sign of improvement. Only about one in seven disagree; in the case of gas these are more likely to be older people (65+) and those with no internet access, though among electricity switchers the pattern is contradictory – in particular those with internet access appear to be less confident of making the right choice next time.

Attitudes to tariff choices

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

	All 2013	Age			Internet access		Physical/Mental Impairment	
		15-34	35-64	65+	Yes	No	Yes	No
Base: All with mains electricity or gas and responsible for bills	*(1,433)* %	*(243)* %	*(717)* %	*(473)* %	*(1151)* %	*(282)* %	*(272)* %	*(1161)* %
Very easy	**13**	13	15	12	15	7	13	4
Fairly easy	**23**	33	22	18	25	15	16	24
Neither easy nor difficult	**24**	26	21	27	22	31	21	24
Fairly difficult	**22**	14	24	23	21	24	22	22
Very difficult	**15**	10	15	20	15	19	24	14
Don't know	**3**	3	3	2	2	3	4	2

Source: Ipsos MORI

The issue of confusion over energy tariffs is a key component of the Retail Market Review. This survey finds energy consumers evenly split on the perceived difficulty of comparing different tariffs: 37% find it very or fairly easy while 37% find it very/fairly difficult; the remainder are undecided. Perception of difficulty is apparently related to age: 46% of the 15-34 age group find it easy compared to just 29% of the 65+ group. In fact, among all those aged over 34 years of age, tariff comparison is more likely to be judged difficult than easy. There are also strong differences by internet access – those with internet access find comparison easy on balance (39% easy; 36% difficult), while those without find it more difficult (easy 23%; difficult 44%). Similarly those with long-term physical or mental disability are more likely to find it difficult. Consumers in Scotland are more likely to judge it difficult (46%) than those in England (36%).

The relationship with social grade, however, is not so clear: while social grade D finds comparison most difficult, the AB group also finds it, on balance, more difficult than easy.

By consumer typology[9] (see appendix) the Lapsed Engaged and Recently Engaged, groups who have previously switched supplier, are more likely than the Disengaged and Partially Engaged, on balance, to find comparison difficult.

Q40. What is it that makes them difficult to compare?

	All	Social Grade			Internet access		Tenure	
		AB	C2	E	Yes	No	Rented	Not Rented
Base: All those who answered 'very/fairly difficult' at OG39	*(530) %*	*(141) %*	*(98) %*	*(62) %*	*(410) %*	*(120) %*	*(130) %*	*(400) %*
Confusing tariffs/information/ difficult to understand/complicated/ Don't know how to compare (net)	**40**	39	44	47	40	43	47	39
Too many tariffs/ multiple rates/ structures/ choices	**23**	27	26	7	25	13	15	25
Hard to compare like for like/ Not standardised information/ different deals/ prices in different formats	**17**	27	8	3	20	5	6	20
Too much jargon/ technical language/ terminology used	**8**	4	9	14	9	8	13	7
Do not keep to price promised/ hidden costs/ misleading/incorrect/ conflicting info/ not transparent/ honest (net)	**7**	6	9	2	7	5	4	7
Not enough information	**5**	5	5	5	6	2	5	5
Not computer literate/ not financially minded/ too many numbers/ suffer from dyslexia (net)	**3**	3	6	4	3	5	1	4
Other	**8**	9	5	10	8	9	6	9
Don't know	**6**	2	7	7	4	13	12	4

Source: Ipsos MORI

[9] The analysis shows consumers divided into four typologies based on their switching of supplier, tariff or payment method: Disengaged, Partially engaged, Lapsed engaged and Recently engaged

Those (37%) who rated comparison of tariffs as difficult were asked what it is that makes them difficult. Many (40%) are unable to articulate more than the general view that tariffs are too complicated, confusing or not clear, without further elaboration. Of the more specific issues, the main observation (by 23%) is that there are simply too many tariffs or choices. Also important is the problem of comparison, which is explained by some in terms of it being hard to compare like with like, and by a need for more standardised information and formats (17% mention this). This is disproportionately mentioned by social grade AB. A few people (8%) mention the jargon or technical language as a barrier to understanding. Some 7% see the problem more in terms of trust of the suppliers than comprehension of the information – for example they see it as misleading or dishonest. The proportion who "blame themselves" for not understanding is very low (3%); they cite issues such as a lack of computer literacy or dyslexia.

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

	All	**Social Grade**			**Nation**			**Tenure**	
		AB	C2	E	England	Scotland	Wales	Rented	Not rented
Base: All those with mains electricity or gas who are responsible for bills	*(1,433) %*	*(330) %*	*(328) %*	*(175) %*	*(1208) %*	*(148) %*	*(77) %*	*(407) %*	*(1026) %*
The right number of tariffs	**20**	19	17	20	20	22	15	19	20
Too many tariffs	**62**	63	67	50	61	59	79	55	64
Too few tariffs	**5**	5	5	6	6	1	4	7	4
Don't know	**14**	13	12	23	14	18	2	19	12

Source: Ipsos MORI

The specific issue of the number of energy tariffs on the market was highlighted spontaneously as important. When asked about this, two-thirds of energy consumers are not happy with the number available, the vast majority of these (62%) believing there are too many and just 5% saying there are too few. While the state-supported social grade E are more likely to give a don't know answer, it is the C2 social grade (skilled manual workers) who are most likely to believe there are too many tariffs. This view is also most prevalent in Wales, though the sample size there is inconclusive. Those not in rented accommodation are more likely to believe there are too many tariffs, while those in rented accommodation show a high proportion of don't know responses. The BME groups are less likely than the white ethnic group to say there are too many tariffs and most likely to believe there are too few (14% of BME group mention this).

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

		Consumer Typology (see Appendix)			
	All	**Disengaged**	**Partially engaged**	**Lapsed engaged**	**Recently engaged**
Base: All those with mains electricity or gas who are responsible for bills	*(1,433) %*	*(763) %*	*(119) %*	*(271) %*	*(280) %*
The right number of tariffs	**20**	23	21	18	13
Too many tariffs	**62**	*54*	66	67	73
Too few tariffs	**5**	6	6	3	5
Don't know	**14**	18	7	12	9

Source: Ipsos MORI

There is a relationship between the level of engagement with the competitive market and the view that there are too many tariffs: 73% of the Recently Engaged take this view, compared to just 54% of the Disengaged. Conversely, those who have had more engagement are less likely to consider there is currently the right number of tariffs.

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

	All	**Social Grade**		**Internet Access**		**Physical/Mental Impairment**	
		AB	E	Yes	No	Yes	No
Base: All those with mains electricity or gas who are responsible for bills	*(1,433) %*	*(330) %*	*(175) %*	*(1151) %*	*(282) %*	*(272) %*	*(1161) %*
Completely	**10**	11	4	10	4	9	10
A fair amount	**35**	35	32	36	29	25	36
Not very much	**35**	36	22	34	37	31	35
Not at all	**19**	16	37	17	28	33	16
Don't know	**2**	2	4	2	1	2	2

Source: Ipsos MORI

When asked to rate their own level of understanding of the range of tariffs available only 10% of energy consumers say they understand completely. Just under half (44%) understand completely or a fair amount and just over half (54%) say not very much or not at all. Overall one in five (19%) say "not at all", rising to 24% among those in rented accommodation, 28% among those with no internet access, 33% among those with a disability and 37% among social grade E. Overall, we can point to an association between indices of vulnerability and poor understanding of the range of tariffs.

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

		Consumer Typology (see Appendix)			
	All	**Disengaged**	**Partially engaged**	**Lapsed engaged**	**Recently engaged**
Base: All those with mains electricity or gas who are responsible for bills	*(1,433) %*	*(763) %*	*(119) %*	*(271) %*	*(280) %*
Completely	**10**	8	12	10	12
A fair amount	**35**	*32*	39	34	39
Not very much	**35**	33	38	38	35
Not at all	**19**	23	11	17	14
Don't know	**2**	4	0	1	0

Source: Ipsos MORI

Engagement with the market also affects reported understanding of the range of different tariffs available. Just over half (51%) of both the Recently Engaged and the Partially Engaged feel they understand the range of tariffs completely or a fair amount. This compares to just 40% of the Disengaged and 44% of the Lapsed Engaged group.

Information and communication 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 pricing plan for the electricity and/or gas you use)?

	All 2013	**Payment method (gas)**			**Social grade**		**Area**			**Tenure**		**Previous survey (all)**
		Monthly/ Quarterly Direct debit	Standard credit	PPM (gas)	AB	E	Urban	Sub-urban	Rural	Rented	Not rented	2012
Base: All with mains gas or electricity who are responsible for bills	*(1,433)* %	*(880)* %	*(109)* %	*(165)* %	*(330)* %	*(175)* %	*(653)* %	*(371)* %	*(409)* %	*(407)* %	*(1026)* %	*(1,484)* %
Yes	**54**	59	40	34	64	41	50	51	61	43	57	48
No	**42**	37	54	64	32	56	46	44	36	52	39	37
Don't know	**4**	4	6	2	3	3	5	5	3	5	4	15

Source: Ipsos MORI

The proportion who have received information on the name of their tariff is up six points this year to 54%. It is lowest among PPM consumers (just 34%), social grade E, urban and suburban consumers, and those who rent their homes. Ethnic group is also important – people from BME groups are significantly less likely to be aware of this information.

Q5b. In the last year, have you received information from your supplier about: any changes to your tariff?												
	All 2013	**Payment method (gas)**			**Social grade**			**Tenure**		**Internet**		**Previous survey (all)**
		Monthly/ Quarterly Direct debit	Standard credit	PPM (gas)	AB	C1	DE	Rented	Not rented	Yes	No	2012
Base: All with mains gas or electricity who are responsible for bills	*(1,433) %*	*(880) %*	*(109) %*	*(165) %*	*(330) %*	*(407) %*	*(368) %*	*(407) %*	*(1026) %*	*(1,151) %*	*(282) %*	*(1,484) %*
Yes	**40**	43	33	23	50	44	29	30	44	43	25	40
No	**56**	52	63	75	44	52	68	65	52	53	72	48
Don't know	**4**	5	3	2	5	5	3	4	4	4	3	12

Source: Ipsos MORI

The proportion saying they are aware of receiving information about changes to their tariff is unchanged at 40%. As last year, awareness is higher among those on direct debit, those from ABC1 social grades, those with internet access and those who do not rent their homes.

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 2013	**Payment method (gas)**			**Social grade**		**Internet access**		**Area**		**Tenure**		**Previous survey (all)**
		Monthly/ Quarterly Direct debit	Standard credit	PPM (gas)	AB	DE	Yes	No	Urban	Rural	Rented	Not rented	2012
Base: All with mains gas or electricity who are responsible for bills	*(1,433) %*	*(880) %*	*(109) %*	*(165) %*	*(330) %*	*(368) %*	*(1151) %*	*(282) %*	*(653) %*	*(409) %*	*(407) %*	*(1026) %*	*(1484) %*
Yes	**47**	50	50	33	51	41	49	38	43	51	38	50	44
No	**48**	46	46	64	43	56	46	59	53	45	57	45	43
Don't know	**4**	5	4	3	6	3	5	2	4	4	4	4	13

Source: Ipsos MORI

While awareness of receiving information about their own forecasted energy consumption is up three points, this is not a statistically significant improvement over last year. Only among the AB social grade does the proportion reach a small majority. Awareness of this is low among PPM consumers, social grade DE, those without internet access and those who rent their homes. Those in rural areas are significantly more likely to recall receiving information about their own forecast consumption than those in urban areas.

Attitudes to specific communications

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

		All	Age			Social Grade			Tenure	
			15-34	35-64	65+	AB	C2	DE	Rented	Not rented
Base: All those with mains electricity or gas who are responsible for bills		*(1,433) %*	*(243) %*	*(717) %*	*(473) %*	*(330) %*	*(328) %*	*(368) %*	*(407) %*	*(1026) %*
An annual statement	Yes	**63**	55	66	62	69	55	57	54	66
	No	**34**	42	30	35	27	42	39	43	30
	Don't know	**4**	3	4	3	4	3	4	3	4
At least one bill or statement of account	Yes	**80**	70	83	84	88	75	73	70	84
	No	**18**	28	16	14	11	24	26	29	15
	Don't know	**1**	2	1	2	1	2	1	1	2
Base: All not on a fixed term contract for both electricity and gas		*(842) %*	*(155) %*	*(429) %*	*(258) %*	*(196) %*	*(178) %*	*(247) %*	*(263) %*	*(579) %*
A price increase notification letter	Yes	**62**	54	64	63	67	54	56	50	66
	No	**34**	43	30	33	29	41	40	45	29
	Don't know	**5**	2	6	4	4	5	4	5	5
Base: All on fixed term for at least one fuel		*(762) %*	*(115) %*	*(360) %*	*(287) %*	*(170) %*	*(185) %*	*(177) %*	*(195) %*	*(567) %*
An end of fixed term letter	Yes	**32**	26	32	35	38	36	27	24	34
	No	**66**	71	66	64	62	62	68	75	64
	Don't know	**2**	3	2	2	1	2	4	2	2

Source: Ipsos MORI

Bills or statements of account are the most widely recalled communications - by 80% of energy consumers (88% among social grade AB). This falls to just 65% of social grade E, and 57% of the BME ethnic group. Among PPM consumers it is 59% for gas and 61% for electricity.

Just 63% remember receiving an annual statement, falling to 50% of social grade E and 42% of the BME ethnic group.

Among those not on fixed term tariffs for both fuels, 62% recall receiving a price increase notification letter (it is likely that all will have seen increased prices in the last year, if they have been with their supplier long enough). The proportion is very low for social grade E (50%) those in rented accommodation (50%), those from BME groups (49%) and those on PPMs (45% for gas; 52% for electricity).

Among those self-identified as being on at least one fixed term tariff, just 32% recall receiving an end of fixed term letter in the past year. It is, of course, unknown how many fixed term accounts actually ended during the year, but, aside from that, analysis by levels of engagement and recent switching behaviour suggests possible consumer confusion resulting in more respondents claiming to be on fixed term accounts than is likely to be the case (See Appendix). So the low proportion recalling end of fixed term letters should be treated with some suspicion. This is least likely of all to be recalled by those in social grade E, in rented accommodation or those in the BME groups.

All forms of communication are more likely to be recalled by older people (aged 35+), by the AB social grades and by those not in rented accommodation.

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

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

Source: Ipsos MORI

While annual statements, bills and price increase notifications all receive similar levels of attention from consumers, the end of fixed term letter receives much greater scrutiny. Over half (53%) of recipients read their end of fixed term letter in detail, compared to about 40% for the other communications. There is some variation in this proportion – it falls to 38% for social grade E, 37% for those in rented accommodation and just 18% of BMEs. The sub-sample size is too small to be conclusive about these differences for end of fixed term letters, but it does follow the same pattern as the other communications, that is, of being read in less detail by the more vulnerable consumer segments.

Q44/46/48/50. Summary Table – Attention paid to supplier communications by typology				
	Annual Statement	**Bill or statement of account**	**Price increase notification letter**	**End of fixed term letter**
Base: All	*All who received annual statement in last year*	*All who received a bill or statement of account in last year*	*All who received a price notification letter in past year*	*All who received an end of fixed term letter in past year*
Disengaged group	*(425)* %	*(546)* %	*(271)* %	*(113)* %
Read it in detail	37	37	41	46
Glanced over it or skim read it	48	46	45	43
Only saw what it was, but did not read it	9	8	10	7
Did not read it at all	6	8	5	4
Partially engaged group	*(72)* %	*(96)* %	*(41)* %	*(32)* %
Read it in detail	48	44	41	64
Glanced over it or skim read it	39	37	43	23
Only saw what it was, but did not read it	4	10	11	10
Did not read it at all	9	9	5	4
Lapsed engaged group	*(204)* %	*(246)* %	*(114)* %	*(31)* %
Read it in detail	39	43	36	58
Glanced over it or skim read it	59	47	52	29
Only saw what it was, but did not read it	6	6	9	13
Did not read it at all	3	4	4	0
Recently engaged group	*(188)* %	*(241)* %	*(80)* %	*(72)* %
Read it in detail	43	42	40	55
Glanced over it or skim read it	50	48	52	38
Only saw what it was, but did not read it	4	8	4	3
Did not read it at all	3	2	4	3

Source: Ipsos MORI

End of fixed term letters are the most likely of the four communications to have been read in detail among all four engagement groups, even among the Disengaged. In fact, the Partially Engaged are apparently most likely of all to have read it (though the sub-sample is too small to be authoritative). Between the other three communications there is little difference within each engagement group.

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

	Annual Statement		**Bill or statement of account**		**Price increase notification letter**		**End of fixed term letter**	
Base:	*All who read in detail/ glanced over annual statement (788) %*		*All who read in detail/ glanced over bill or statement of account (969) %*		*All who read in detail/ glanced over price increase notification letter (436) %*		*All who read in detail/ glanced over end of fixed term letter (220) %*	
	Agree	**Dis agree**	**Agree**	**Dis agree**	**Agree**	**Dis agree**	**Agree**	**Dis agree**
	%	**%**	**%**	**%**	**%**	**%**	**%**	**%**
I understood the information	77	9	77	10	79	10	81	6
The information made me consider my energy options	43	31	39	37	39	40	60	21
I took action as a result of reading this information. For example, I looked into, or actually switched supplier, tariff or payment method*	28	52	27	55	24	58	49	28

Source: Ipsos MORI

* In Q47 (bill or statement of account), statement reads 'Other than paying the bill, I took action as a result of reading this information. For example I looked into, or actually switched supplier, tariff or payment method'

End of fixed term letters prove, on the face of it, to be the most effective call to action among the four communications. Not only do they attract most attention, but they are most likely to make consumers consider their energy options (60%) and most likely to actually cause consumers to take action to engage with the market in some way (49%). The other three forms of communication stimulate consideration and action to a similar degree to each other – each would motivate about two-fifths to consider their options, and around a quarter to take action. In all four cases, claimed understanding of the communication is similarly high, though it is highest of all for end of fixed term letters.

In all cases, there is a relationship between the propensity to take action, or consider options, and social grade, with ABC1 social grades more likely to act on the information than the DE groups, especially social grade E. The 65+ age group is also consistently less likely to take action than younger age groups. The relationship with home tenure and ethnic group is less clear, however.

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

	Annual Statement		Bill or statement of account		Price increase notification letter		End of fixed term letter	
	All who read in detail/ glanced over annual statement		*All who read in detail/ glanced over bill or statement of account*		*All who read in detail/ glanced over price increase notification letter*		*All who read in detail/ glanced over end of fixed term letter*	
	Agree	**Dis agree**	**Agree**	**Dis agree**	**Agree**	**Dis agree**	**Agree**	**Dis agree**
Disengaged group	*(362) %*		*(452) %*		*(228) %*		*(99) %*	
I understood the information	74	11	71	12	76	12	74	9
The information made me consider my energy options	39	33	32	40	34	44	47	29
I took action as a result of reading this information. For example, I looked into, or actually switched supplier, tariff or payment method*	21	55	24	55	21	57	39	39
Partially engaged group	*(64) %*		*(78) %*		*(35) %*		*(27) %*	
I understood the information	83	10	80	5	71	13	82	7
The information made me consider my energy options	44	30	46	33	42	37	60	16
I took action as a result of reading this information. For example, I looked into, or actually switched supplier, tariff or payment method*	26	48	29	50	29	51	49	26

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	Annual Statement		**Bill or statement of account**		**Price increase notification letter**		**End of fixed term letter**	
	All who read in detail/ glanced over annual statement		*All who read in detail/ glanced over bill or statement of account*		*All who read in detail/ glanced over price increase notification letter*		*All who read in detail/ glanced over end of fixed term letter*	
	Agree	**Dis agree**	**Agree**	**Dis agree**	**Agree**	**Dis agree**	**Agree**	**Dis agree**
Lapsed engaged group	*(189) %*		*(223) %*		*(101) %*		*(28) %*	
I understood the information	82	7	84	5	88	5	90	0
The information made me consider my energy options	41	37	38	41	35	39	64	10
I took action as a result of reading this information. For example, I looked into, or actually switched supplier, tariff or payment method*	24	60	20	63	22	67	35	28
Recently engaged group	*(173) %*		*(216) %*		*(72) %*		*(66) %*	
I understood the information	76	10	80	11	77	12	88	9
The information made me consider my energy options	54	22	49	29	54	34	74	15
I took action as a result of reading this information. For example, I looked into, or actually switched supplier, tariff or payment method*	46	36	38	47	37	51	67	15

Source: Ipsos MORI

Levels of engagement have some influence on claimed propensity to take action or to consider options, but contrasts between end of fixed term letters and the other three communications are detectable for all engagement groups, with end of fixed term letters always apparently more effective motivations. Even among the Disengaged, recipients of end of fixed term letters are more likely than recipients of other communications to say they took action or considered their options. The absolute proportions, however, among the Disengaged (where 39% said they took action and 47% considered options as a result of an end of fixed term letter) are considerably lower than the corresponding figures among the Recently Engaged group (67% and 74% respectively).

Trust in openness and transparency of energy suppliers

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

	Total 2013	Age			Social grade		Ethnicity		Internet access		Previous survey (all)
		15-34	35-64	65+	AB	DE	White	*BME*	*Yes*	*No*	*2012*
Base: All with mains gas or electricity who are responsible for bills	*(1,433) %*	*(243) %*	*(717) %*	*(473) %*	*(330) %*	*(368) %*	*(1,303) %*	*(124) %*	*(1,151) %*	*(282) %*	*(1,484) %*
Trust (completely/ tend to)	**29**	27	26	37	24	35	29	32	27	40	34
Neither	**27**	32	25	28	25	23	26	40	26	29	26
Distrust (completely/ tend to)	**43**	41	48	35	50	42	45	26	46	30	39

Source: Ipsos MORI

Since this question was first asked last year, trust in energy suppliers to be open and transparent in their dealings with consumers has fallen further, and is now decisively outweighed by distrust (trust 29%; distrust 43%). Trust is down five points, and distrust is up four points; both are statistically significant changes.

With such a widespread negative balance of trust, there are now only a few groups among energy consumers who still trust energy suppliers on balance. They include the BME groups and consumers with no internet access. Consumers in Scotland, uniquely, are evenly balanced between trust and distrust, and those in Wales are only very slightly distrustful on balance.

More engaged energy consumers are more likely to distrust than to trust the suppliers to be open and honest. Among the Recently Engaged, just 23% trust the suppliers, while 53% distrust them. Among the Disengaged, the figures are more evenly balanced (34% trust; 37% distrust).

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

	Total 2013	**Consumer typologies (see appendix)**			
		Disengaged	**Partially engaged**	**Lapsed engaged**	**Recently engaged**
Base: All with mains gas or electricity who are responsible for bills	*(1,433) %*	*(763) %*	*(119) %*	*(271) %*	*(280) %*
Trust (completely/tend to)	29	34	33	21	23
Neither	27	28	*32*	25	24
Distrust (completely/tend to)	43	37	36	54	53

Source: Ipsos MORI

Household financial stability

Q38. Which of these statements best applies to you?

	Total 2013	Tenure		Age			Social Grade		Previous surveys (all)		
		Rented	Non-rented	15-34	35-64	65+	AB	DE	2010	2011	2012
Base: All with either mains gas or electricity who are responsible for bills	*(1,433) %*	*(407) %*	*(1026) %*	*(243) %*	*(717) %*	*(473) %*	*(330) %*	*(368) %*	*(1,554) %*	*(1,525) %*	*(1,484) %*
I am/ We are keeping up with all the household bills without any difficulties	**62**	43	69	50	62	74	80	42	63	62	66
I am/ We are keeping up with all the household bills, but it is a struggle from time to time	**27**	37	24	33	27	22	17	34	25	25	23
I am/ We are keeping up with all the household bills, but it is a constant struggle	**8**	15	6	12	9	3	2	16	9	8	8
I am/ We are falling behind with some household bills	**1**	4	1	3	1	*	*	5	1	1	1
I am/ We are having real financial problems and have fallen behind with many bills	**1**	2	1	3	1	*	*	2	1	1	1

Source: Ipsos MORI

Despite the economic slowdown, this question does not reveal any significant change in views of the affordability of household bills. A consistent two percent of energy consumers believe they are falling behind, and this is unchanged since 2010. This very low proportion of energy consumers who admit they are experiencing real difficulties means their sub-sample size is too small to be able to look at their views and behaviour separately.

Appendices

Appendices

Sample Profile

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

	All 2007	All 2008	All 2010	All 2011	All 2012	All 2013
Base: All respondents	*(2,020) %*	*(2,063) %*	*(1,992) %*	*(1,992) %*	*(1,956) %*	*(1,960) %*
Mains gas	78	81	86	85	80	83
Mains electricity	94	95	95	94	94	95
Neither/Don't know/Refused	5	9	5	3	3	2

Source: Ipsos MORI

QOG02. 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	All 2013
Base: All with mains gas or electricity	*(1,964) %*	*(1,981) %*	*(1,904) %*	*(1,925) %*	*(1,884) %*	*(1,911) %*
Yes	77	75	80	77	79	73
No	23	25	20	23	21	27

Source: Ipsos MORI

QOG04. Are you on a dual fuel deal?

	All 2007	All 2008	All 2010	All 2011	All 2012	All 2013
*Base: All with mains gas and electricity who are responsible for the bill and have same supplier for both (who comprise 89% of all with mains gas **and** electricity who are responsible for bills (2013))*	*(1,964) %*	*(1,005) %*	*(1,144) %*	*(1,138) %*	*(1,066) %*	*(1,061) %*
Yes	-	64	72	74	72	75
No	-	22	16	15	15	19

Source: Ipsos MORI

Methods of Payment

QOG08. How do you pay for the gas you use?	All 2007	All 2008	All 2010	All 2011	All 2012	All 2013
Base: All those with mains gas who are responsible for the bill	*(1,243) %*	*(1,243) %*	*(1,369) %*	*(1,331) %*	*(1,232) %*	*(1,214) %*
Monthly direct debit	62	65	70	70	69	68
Quarterly direct debit	-	-	-	-	-	8
Pay quarterly in arrears/cheque, cash or card on receipt of bill	23	19	13	14	13	8
Prepayment meter	8	10	11	11	11	12
Fuel Direct	*	*	*	0	-	*
Weekly/fortnightly payment scheme	2	1	1	1	1	1
Payment card/book ad hoc	3	3	3	2	2	2
Other	1	1	1	1	2	*
Don't know	1	1	1	1	2	*

Source: Ipsos MORI

QOG10. How do you pay for the electricity you use?	All 2007	All 2008	All 2010	All 2011	All 2012	All 2013
Base: All those with mains electricity who are responsible for the bill	*(1,516) %*	*(1,519) %*	*(1,540) %*	*(1,500) %*	*(1,461) %*	*(1,408) %*
Monthly direct debit	60	64	68	70	68	65
Quarterly direct debit	-	-	-	-	-	8
Pay quarterly in arrears/cheque, cash or card on receipt of bill	24	19	15	13	13	8
Prepayment meter	9	11	12	12	12	14
Fuel Direct	*	*	*	*	-	*
Weekly/fortnightly payment scheme	2	2	1	1	1	1
Payment card/book ad hoc	3	3	3	2	2	1
Other	1	1	*	2	2	1
Don't know	1	1	1	1	1	*

Source: Ipsos MORI

Note: In 2013, 'Quarterly direct debit' was included in the questionnaire as a payment method but was not statistically significant enough to report on exclusively.

Online Tariff

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

	2010	2011	2012	2013
Base: All who have mains gas and are responsible for the bill	*(1,369)* *%*	*(1,331)* *%*	*(1,232)* *%*	*(1,214)* *%*
Yes	12	21	22	27
No	85	75	73	71
Don't know	3	4	5	2

Source: Ipsos MORI

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

	2010	2011	2012	2013
Base: All who have mains electricity and are responsible for the bill	*(1,540)* *%*	*(1,500)* *%*	*(1,461)* *%*	*(1,408)* *%*
Yes	12	19	22	25
No	85	77	73	73
Don't know	3	3	5	2

Source: Ipsos MORI

Fixed term tariffs

QOG07. Are you on a fixed term tariff for gas, for electricity or for both?

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

Source: Ipsos MORI

Cross analysis with other questions suggests that many consumers have misinterpreted the question on fixed term tariffs and answered it incorrectly. For example, 58% of those who claim to be on “fixed term tariffs” also say they have never switched supplier, which seems unlikely.

Amount spent on home energy

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

	All giving numerical answer	**Payment method**				**Social Grade**				
		Monthly/ Quarterly Direct Debit (gas)	PPM (gas)	Monthly/ Quarterly Direct Debit (elec)	PPM (elec)	AB	C1	C2	D	E
Base: All giving numerical answer	*(1,317) %*	*(803) %*	*(162) %*	*(904) %*	*(223) %*	*(292) %*	*(373) %*	*(303) %*	*(185) %*	*(164) %*
0-£700	14	10	11	14	14	10	15	16	16	20
£701-£1,200	46	50	36	49	36	46	45	45	52	41
£1,201-£1,500	15	17	10	15	9	18	15	14	11	12
£1,501+	25	23	43	22	41	26	26	25	21	27
MEAN	£1259	£1273	£1494	£1223	£1450	£1356	£1227	£1234	£1195	£1232
Base: All with mains gas or electricity	*(1,433) %*									
Don’t know	9	9	2	9	2	12	8	8	5	7

Source: Ipsos MORI

Current gas and electricity suppliers

QOG53. Who is your current electricity supplier?

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

Source: Ipsos MORI

QOG54. Who is your current gas supplier?

Base: All who have mains gas and responsible for bills	(1214) %
British Gas	35
E.ON	16
npower	10
Scottish Power	10
EDF	8
Southern Energy	6
SSE	3
Scottish Hydro	2
Swalec	2
Co-operative Energy	1
Ecotricity	1
First Utility	1
Marks & Spencer Energy	*
Ebico	*
Ovo	*
Sainsburys Energy	1
Spark Energy	*
Good Energy	-
Other	*
Don’t know	2

Source: Ipsos MORI

Consumer typologies: Engagement			
	Proportions of:		
	All energy consumers	**Gas consumers**	**Electricity consumers**
	(1,433) *%*	*(1,214)* *%*	*(1,408)* *%*
Disengaged – Never switched supplier and not switched tariff/payment method in 2012/13 (either fuel)	51	50	51
Partially engaged – Never switched supplier and switched tariff/payment method in 2012/13 (either fuel)	9	9	9
Lapsed engaged – Switched before 2012 and NEITHER switched supplier in 2012/13 nor switched tariff/payment method in 2012/13 (either fuel)	19	19	19
Recently engaged – Either switched supplier in 2012/13 OR (switched tariff/payment method in 2012/13 (either fuel) AND switched supplier before 2012 (either fuel))	21	22	21

Demographics

	2013 Weighted	2013 Unweighted
Base: All respondents	*(1,959)* *%*	*(1,960)* *%*
Age		
15-34	32	28
35-64	48	44
65+	20	27
Social Group		
AB	26	21
C1	28	28
C2	22	24
DE	24	27
Region		
England	86	86
Wales	5	5
Scotland	9	9
Area		
Urban	24	26
Suburban	51	51
Rural	24	21
Internet Access		
Yes	87	83
No	13	17
Ethnic Group		
White	88	87
BME	11	13
Physical/ Mental Impairment		
Yes	15	19
No	85	81

Source: Ipsos MORI

Questionnaire and topline results

Questionnaire and topline results

Ofgem Switching Omnibus (Customer Engagement Tracker) Survey 2013 Topline Results

- This topline shows the results for a face-to-face survey conducted among a representative quota sample of 1,960 residents of Great Britain in the period 1-14 March 2013. Comparisons, where available, are shown with surveys in 2012, 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

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

	March '08 %	March '10 %	January '11 %	March '12 %	March '13 %
Yes – Mains electricity	94	95	94	94	95
Yes – Mains gas	78	86	85	80	83
No – Neither	2	2	1	2	2
Don't know	2	1	1	1	*
Refused	1	2	1	1	-

Base: All respondents (1960)

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

	March '08 %	March '10 %	January '11 %	March '12 %	March '13 %
Yes	75	80	77	79	73
No	25	20	23	21	27

Base: All who have mains electricity and/or gas (1911)

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

	March '08 %	March '10 %	January '11 %	March '12 %	March '13 %
Yes	80	84	87	88	90
No	17	14	12	10	10
Don't know	3	2	2	2	1

Base: All who have both mains electricity and gas, and are responsible for bills (1189)

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

	March '08 %	March '10 %	January '11 %	March '12 %	March '13 %
Yes	64	72	74	72	75
No	22	16	15	15	19
Don't know	14	12	11	14	6

Base: All with same supplier for both fuels (1061)

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

OG05.

		January '11 %	March '12 %	March '13 %
The name of the tariff you are on (your tariff is the pricing plan for the electricity and/or gas you use)?[1]	Yes	42	48	54
	No	40	37	42
	Don't know	18	15	4
Any changes to your tariff?	Yes	45	40	40
	No	44	48	56
	Don't know	11	12	4
The forecast cost of your energy consumption over the coming year	Yes	45	44	47
	No	44	43	48
	Don't know	11	13	4

Base: All with gas or electricity who are responsible or jointly responsible for bills (1433)

[1] In 2012 questionnaire, statement read: '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)'

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

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

Base: All responsible or jointly responsible for bills (1433)

OG07. **Are you on a fixed term tariff for gas, for electricity or for both?[1]**

	March '12	March '13
	%	%
Yes – gas		2
Yes – electricity		10
Yes (either)	38	53
Yes - both		41
No	42	39
Don't know	21	9

Base: All responsible or jointly responsible for bills (1433)

[1] In 2012 questionnaire, question read: 'Are you on a fixed term tariff?' and possible responses were 'Yes,' 'No' and 'Don't know'

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

	March '08 %	March '10 %	January '11 %	March '12 %	March '13 %
Monthly Direct Debit	65	70	70	69	68
Quarterly Direct Debit[1]	-	-	-	-	8
Pay by cheque, cash or card on receipt of your bill	19	13	14	13	8
Prepayment Meter	10	11	11	11	12
Fuel Direct (where a set amount is deducted from your benefits before you receive them)	*	*	-	-	*
Weekly/Fortnightly payment scheme	1	1	1	1	1
Payment card/book that I use whenever I choose (Ad Hoc)	3	3	2	2	2
Other	1	1	1	2	*
Don't know	1	1	1	2	*

Base: All with mains gas and responsible for bill (1214)

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

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

Base: All those who have mains gas in their home and are responsible for the bill (1214)

[3] New code introduced in 2013

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

	March '08 %	March '10 %	January '11 %	March '12 %	March '13 %
Monthly Direct Debit	64	68	70	68	65
Quarterly Direct Debit[1]	-	-	-	-	8
Pay by cheque, cash or card on receipt of your bill	19	15	13	13	8
Prepayment Meter	11	12	12	12	14
Fuel Direct (where a set amount is deducted from your benefits before you receive them)	*	*	*	-	*
Weekly/Fortnightly payment scheme	2	1	1	1	1
Payment card/book that I use whenever I choose (Ad Hoc)	3	3	2	2	1
Other	1	*	2	2	1
Don't know	1	1	1	1	*

Base: All with mains electricity and responsible for bill (1408)

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

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

Base: All with mains electricity and responsible for bill (1408)

OG12a. **Did you switch your gas supplier in 2012?[2]**

	March '08 %	March '10 %	January '11 %	March '12 %	March '13 %
Yes	20	17	15	13	11
No/Don't know	80	83	85	87	89

Base: All with mains gas and responsible for bill (1214)

[1] New code introduced in 2013
[2] In 2012 questionnaire, question read: 'Did you switch your gas supplier in 2011?'

OG12b. **And have you switched your gas supplier so far in 2013?[1]**

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

Base: All with mains gas and responsible for bill (1214)

OG13. **Did you switch your gas supplier at any time before 2012?[2]**

	March '08	March '10	January '11	March '12	March '13
	%	%	%	%	%
Yes	29	32	30	27	28
No/ Don't know	71	68	70	73	72

Base: All who did not switch gas supplier during 2012/2013 (1063)

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

	March '08	March '10	January '11	March '12	March '13
	%	%	%	%	%
Once	53	49	56	44	38
Twice	26	26	21	19	25
Three times ("or more" - before 2011)	21	25	12	21	19
Four times or more			11	15	17

Base: All who have ever switched gas supplier (440)

OG15a. **Even though you stayed with the same gas supplier in 2012 and so far in 2013, did you change the tariff you have with them or the method by which you pay them?[3]**

	March '08	March '10	January '11	March '12	March '13
	%	%	%	%	%
Yes – changed tariff				9	11
Yes – changed payment method				4	5
Yes (either)	9	10	12	12	15
No	88	88	84	88*	85*
Don't Know	4	2	4		

Base: All who have not switched gas supplier in 2012/13 (1063) * No/DK combined in 2012 and 2013

[1] In 2012 questionnaire, question read: 'And have you switched your gas supplier so far in 2012?'
[2] In 2012 questionnaire, question read: 'Did you switch your gas supplier before 2011?'
[3] In 2012 questionnaire, question read: '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?'

OG15b. **When you switched gas supplier in 2012 or 2013, did you also change your payment method at the same time?**[1]

	%
Yes	15
No/Don't know	85

Base: All those who switched gas supplier during 2012/2013 (151)

OG15c. **What method of payment for gas did you change from?**[2]

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

Base: All those who have changed tariff or payment method for gas in past year (178)

OG16a. **Did you switch your electricity supplier in 2012?**[4]

	March '08 %	March '10 %	January '11 %	March '12 %	March '13 %
Yes	19	18	17	14	12
No/Don't know	81	82	83	86	88

Base: All who have mains electricity and are responsible for bill (1408)

[1] New question introduced in 2013
[2] In 2012 questionnaire, this question was OF15b
[3] New code introduced in 2013
[4] In 2012 questionnaire, question read: 'Did you switch your electricity supplier in 2011?'

OG16b. **And have you switched your electricity supplier so far in 2013?**[1]

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

Base: All who have mains electricity and are responsible for bill (1408)

OG17. **Did you switch your electricity supplier at any time before 2012?**[2]

	March '08	March '10	January '11	March '12	March '13
	%	%	%	%	%
Yes	26	30	28	24	29
No	74	70	72	76	71

Base: All who did not switch electricity supplier in 2012/13 (1234)

OG18. **How many times have you ever switched your electricity supplier?**

	March '08	March '10	January '11	March '12	March '13
	%	%	%	%	%
Once	55	46	56	44	42
Twice	23	27	20	22	23
Three times ("or more" - before 2011)	22	26	14	20	19
Four times or more			10	15	16

Base: All who have ever switched electricity supplier (510)

OG19a. **Even though you stayed with the same electricity supplier in 2012 and so far in 2013, did you change the tariff you have with them or the method by which you pay them?**[3]

	March '08	March '10	Januar y '11	March '12	March '13
	%	%	%	%	%
Yes – changed tariff				10	10
Yes – changed payment method				3	6
Yes (either)	8	8	10	12	15
No	89	89	86	88*	85*
Don't Know	4	2	3		

Base: All who have not switched electricity supplier in 2012/13 (1234) * No/DK combined in 2012 and 2013

[1] In 2012 questionnaire, question read: 'And have you switched your electricity supplier so far in 2012?'
[2] In 2012 questionnaire, question read: 'Did you switch your electricity supplie3r before 2011?'
[3] In 2012 questionnaire, question read: 'Even though you stayed with the same66 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?'

OG19b. **When you switched electricity supplier in 2012 or 2013, did you also change your payment method at the same time?**[1]

	%
Yes	16
No/Don't know	84

Base: All who have switched electricity supplier in 2012/13 (174)

OG19c. **What method of payment for electricity did you change from?**[2]

	March '12 %	March '13 %
Monthly Direct Debit	4	6
Quarterly Direct Debit[3]		6
Pay by cheque, cash or card on receipt of your bill	14	15
Prepayment Meter	2	3
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	2
Did not change payment method	74	66
Don't know	4	-

Base: All those who have changed tariff or payment method for electricity in past year (205)

Summary 1

	March '07 %	March '08 %	March '10 %	January '11 %	March '12 %	March '13 %
Ever switched gas supplier	37	43	43	41	37	38
Ever switched electricity supplier	39	40	42	40	35	38

Base: All who have each fuel and pay bills (1214 gas, 1408 electricity)

[1] New question introduced in 2013
[2] In 2012 questionnaire, this question was OF19b
[3] New code introduced in 2013

Summary 2

	March '07 %	March '08 %	March '10 %	January '11 %	March '12 %	March '13 %
Switched either fuel in last year*	24	21	19	18	15	14
Switched either fuel ever	41	45	46	43	38	40

Base: All with either fuel and pay bills (1433) *last year = 2012

OG20. **Did you know it was possible to change to a different tariff or method of payment with your current supplier?**[1]

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

Base: All those who have not changed gas or electricity tariff or payment method (1214) *before 2013, 'Yes' option was not segmented 3 ways

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

	March '08 %	March '10 %	January '11 %	March '12 %	March '13 %
Yes (either)	80	83	87	82	84
Yes – knew possible to switch both				79	77
Yes- electricity but not gas				2	2
Yes- gas but not electricity				1	5
No	16	14	10	16	16
Don't know	4	4	3	3	1

Base: All who have never switched either (882)

[1] In 2012 questionnaire, possible responses were 'Yes,' 'No' and 'Don't know'

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

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

Base: All who have never switched either (882)

[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

OG23. **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 %	March '13 %
Believed new supplier was cheaper/to save money	78	78	79	76	75
Believed new supplier offered better customer service	6	6	7	5	6
Believed new supplier offered better benefits (e.g. loyalty points)				2	1
Wanted a dual fuel package	3	6	4	5	4
Wanted a fixed-price deal	2	3	1	2	2
Wanted a "greener" tariff [1]	1	1	1	*	1
Wanted an online tariff[2]	0	*	1	0	*
Written communication from your supplier	0	0	0	*	-
Moved home#[3]	0	0	0	3	6
Poor service#	0	0	0	1	*
Other	7	1	1	1	2
Don't know	2	2	2	1	1

Base: All who have gas and are responsible for bill and have ever switched gas supplier (440) # Codes added post-fieldwork

[1] "wanted to switch to a "greener" environmentally friendly tariff or supplier" - 2011
[2] 2008 wording: "The attraction of an online tariff"
[3] New code introduced in 2013

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

	March '08 %	March '10 %	January '11 %	March '12 %	March '13 %
Supplier/representative knocked at my door[1]	41	33	31	23	19
Used an on-line/website price comparison service (e.g. USwitch, Money Supermarket)	21	26	21	34	35
New supplier phoned me[2]	7	8	7	6	5
I spoke to a salesperson in street/shopping centre/public place	-	7	7	10	7
A friend or family member told me about it	6	7	6	6	6
I saw an advert	11	5	4	2	3
I phoned a comparison service	-	4	7	4	4
I looked at the websites of more than one supplier	-	4	3	3	7
I rang them only	5	2	3	4	4
I looked at the supplier's own website only	-	1	4	3	3
I rang them and other suppliers	4	1	2	3	3
Written communication or marketing material from your supplier[3]	-	-	-	1	1
Through a collective (group) switching campaign organised by a third party (e.g. council/charity/housing association, Big Switch, ready to Switch etc)[4]	-	-	-	-	1
Other	6	5	5	4	7
Don't know	4	3	4	4	2

Base: All ever switched gas supplier (440)

[1] They knocked on my door - 2011
[2] They phoned me - 2011
[3] In 2012 questionnaire, statement read: 'Written communication or marketing material'
[4] New statement introduced in 2013

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

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

Base: All ever switched gas supplier (440)

OG26. **To the best of your knowledge, do you feel that you are now paying less than you would have if you hadn't switched?**

	March '08	March '10	January '11	March '12	March '13
	%	%	%	%	%
Yes	64	64	62	72	68
No	20	14	12	17	19
Don't know/Not sure	15	22	26	11	13*

Base: All who ever switched gas supplier to save money (328) *2013 code 'Don't know' only

[1] By letter/mail - 2011
[2] New statement introduced in 2013

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

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

Base: All with gas who have ever switched (440)

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

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

Base: All with gas who have ever switched (440)

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

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

Base: All with gas who have ever switched (440)

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

	March '08 %	March '10 %	January '11 %	March '12 %	March '13 %
Believed new supplier was cheaper/to save money	77	77	77	77	76
Believed new supplier offered better customer service	6	7	7	5	5
Wanted a dual fuel package	4	6	5	5	4
Wanted a fixed-price deal	2	4	2	1	2
Wanted a greener tariff [1]	2	1	2	1	1
Believed new supplier offered better benefits (e.g. Loyalty points)	-	-	-	2	1
Written communication from your supplier	-	-	-	*	*
Wanted an online tariff*	0	*	*	*	*
Moved home#[2]	-	-	-	3	5
Poor service#	-	-	-	1	1
New tenant#	-	-	-	*	-
Was on a meter#	-	-	-	*	*
Dispute with supplier#	-	-	-	*	1
Other	6	1	1	1	2
No answer	-	-	-	1	*
Don't know	2	1	2	2	*

Base: All who have electricity and are responsible for bill and have ever switched electricity supplier (510) # Codes added post-fieldwork
* 2008 wording: "The attraction of an online tariff"

[1] Wanted to switch to a "greener" environmentally friendly tariff or supplier - 2011
[2] New statement introduced in 2013

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

	March '08 %	March '10 %	January '11 %	March '12 %	March '13 %
Used an on-line/website price comparison service (e.g. USwitch, Money Supermarket)	22	27	24	31	37
Phoned a comparison service	-	3	5	5	4
Looked at the supplier's own website only	1	2	4	4	2
Looked at the websites of more than one supplier	-	3	2	3	5
Supplier representative knocked at my door[1]	41	34	29	22	17
Spoke to a salesperson in street/shopping centre/public place	-	6	7	7	7
New supplier phoned me[2]	6	8	9	8	4
I saw an advert	12	4	5	5	3
I rang them only	4	2	4	4	5
I rang them and other suppliers	3	2	2	3	4
A friend or family member told me about it	5	7	6	5	6
Written communication or marketing material from your supplier[3]	-	-	-	1	3
Through a collective (group) switching campaign organised by a third party (e.g. council/charity/housing association, Big Switch, ready to Switch etc)[4]					1
Other	6	6	5	3	7
Don't know	5	2	4	3	2

Base: All who have ever switched electricity supplier (510)

[1] They knocked at my door - 2011
[2] They phoned me - 2011
[3] In 2012 questionnaire, statement read: 'Written communication or marketing material'
[4] New statement introduced in 2013

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

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

Base: All those who have ever switched electricity supplier (510)

OG31. **To the best of your knowledge, do you feel that you are now paying less than you would have if you hadn't switched?**

	March '08	March '10	January '11	March '12	March '13
	%	%	%	%	%
Yes	62	67	64	73	70
No	24	12	11	13	20
Don't know/Not sure	15	21	25	14	10

Base: All who have ever switched electricity supplier to save money (384)

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

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

Base: All with electricity who have ever switched (510)

[1] By letter/mail – 2011 and in 2012 questionnaire, statement read: 'written communication'
[2] New statement introduced in 2013

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

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

Base: All with electricity who have ever switched (510)

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

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

Base: All with electricity who have ever switched (510)

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

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

Base: All who have gas or electricity and have changed tariff or payment method in 2012/2013 (219)

Code added post fieldwork

[1] New statement introduced in 2013

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

	March '12 %	March '13 %
Used an online/website price comparison service	26	24
Phoned a comparison service	7	4
Looked at supplier's own website only	4	4
Looked at websites of more than one supplier	5	2
Supplier representative knocked at my door	12	8
Spoke to a salesperson in the street/shopping centre/other public place	5	3
They phoned me	8	8
I saw an advert	2	4
I rang them only	7	17
I rang them and other suppliers	2	5
A friend or family member told me about it	3	4
Written communication or marketing material from your supplier[1]	13	7
Other	5	8
Don't know	7	5

Base: All who have gas or electricity and have changed tariff or payment method in 2012/2013 (219)

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

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

Base: All who have gas or electricity and have changed tariff or payment method in 2012/2013 (219)

[1] In 2012 questionnaire, statement read: 'Written communication or marketing material'

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

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

Base: All who have never switched either gas or electricity (882)

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

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

Base: All who have ever switched either gas or electricity (551)

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

	March '08 %	March '10 %	January '11 %	March '12 %	March '13 %
I am/we are keeping up with all the household bills without any difficulties	70	63	62	66	62
I am/we are keeping up with all the household bills, but it is a struggle from time to time	20	25	25	23	27
I am/we are keeping up with all the household bills, but it is a constant struggle	7	9	8	8	8
I am/we are falling behind with some household bills	1	1	1	1	1
I am/we are having real financial problems and have fallen behind with many bills	2	1	1	1	1
Don't know	0	2	2	2	*

Base: All with mains electricity or gas and responsible for bills (1433)

OG39. **Using the answers here, how easy or difficult do you believe it is to compare different tariffs for electricity or gas?[1]**

	%
Very easy	13
Fairly easy	23
Neither easy nor difficult	24
Fairly difficult	22
Very difficult	15
Don't know	3

Base: All with mains electricity or gas and responsible for bills (1433)

[1] New question introduced in 2013

OG40. **What is it that makes them difficult to compare?**[1]

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

Base: All those who answered 'very/fairly difficult' at OG39 (530)

OG41. **Thinking about the number of different tariffs available to you, in your view, are there the right number of energy tariffs available, or are there too many tariffs or too few tariffs?**[2]

	%
The right number of tariffs	20
Too many tariffs	62
Too few tariffs	5
Don't know	14

Base: All those with mains electricity or gas and responsible for bills (1433)

OG42. **To what extent would you say you understand the range of different energy tariffs available to you?**[3]

	%
Completely	10
A fair amount	35
Not very much	35
Not at all	19
Don't know	2

Base: All with either mains gas or electricity who are responsible for bills (1433)

[1] New question introduced in 2013 (Main answer codes only)
[2] New question introduced in 2013
[3] New question introduced in 2013

OG43. **Please tell me if you recall receiving any of the following in the last year? You may have received these via post or email.**[1]

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

	%
Yes	63
No	34
Don't know	4

Base: All those with mains electricity or gas and responsible for bills (1433)

B.

At least one bill or statement of account

	%
Yes	80
No	18
Don't know	1

Base: All those with mains electricity or gas and responsible for bills (1433)

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

	%
Yes	62
No	34
Don't know	5

Base: All not on fixed term contract for both electricity and gas (842)

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

	%
Yes	32
No	66
Don't know	2

Base: All on fixed term for at least one fuel (762)

[1] New question introduced in 2013

OG44. **Thinking about the last annual statement you received, in how much detail did you look at it?**[1]

	%
Read it in detail	40
Glanced over it or skim read it	49
Only saw what it was, but did not read it	7
Did not read it at all	5

Base: All received annual statement in the last year (889)

OG45. Thinking about last **annual statement** you received, to what extent do you agree or disagree with the following statements?[2]

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

Base: All read in detail /glanced over annual statement (788)

OG46. Thinking about the last **bill or statement of account** you received, in how much detail did you look at it?[3]

	%
Read it in detail	40
Glanced over it or skim read it	46
Only saw what it was, but did not read it	8
Did not read it at all	6

Base: All received bill or statement of account in last year (1129)

[1] New question introduced in 2013
[2] New question introduced in 2013
[3] New question introduced in 2013

OG47. Thinking about last **bill or statement of account** you received, to what extent do you agree or disagree with the following statements?[1]

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

Base: All read in detail /glanced over bill/statement of account (969)

OG48. Thinking about the last **price increase notification letter** you received, in how much detail did you look at it?[2]

	%
Read it in detail	39
Glanced over it or skim read it	47
Only saw what it was, but did not read it	8
Did not read it at all	5

Base: All received price notification letter in past year (506)

[1] New question introduced in 2013
[2] New question introduced in 2013

OG49. Thinking about last **price increase notification letter** you received, to what extent do you agree or disagree with the following statements?[1]

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

Base: All read in detail /glanced over price notification letter (436)

OG50. Thinking about the last **end of fixed term letter** you received, in how much detail did you look at it?[2]

	%
Read it in detail	53
Glanced over it or skim read it	37
Only saw what it was, but did not read it	7
Did not read it at all	3

Base: All received end of fixed term letter in past year (248)

[1] New question introduced in 2013
[2] New question introduced in 2013

OG51. Thinking about last **end of fixed term letter** you received, to what extent do you agree or disagree with the following statements?[1]

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

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

OG52. Using the words here, please tell me the extent to which you trust or distrust energy suppliers to be **open and transparent in their dealings with consumers**?[2]

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

Base: All with mains electricity or gas and responsible for bills (1433)

[1] New question introduced in 2013
[2] New question introduced in 2013

OG53. **Who is your current electricity supplier?**[1]

	%
British Gas	27
E.ON	19
EDF	11
Scottish Power	11
npower	10
Southern Energy	7
SSE	3
Scottish Hydro	2
Swalec	2
First Utility	1
Ecotricity	1
Co-operative Energy	*
Ebico	*
Good Energy	*
Marks & Spencer Energy	*
Ovo	*
Sainsburys Energy	*
Spark Energy	*
Other	*
Don’t know	2

Base: All with mains electricity and responsible for bills (1408)

[1] New question introduced in 2013

OG54. **Who is your current gas supplier?**[1]

	%
British Gas	35
E.ON	16
npower	10
Scottish Power	10
EDF	8
Southern Energy	6
SSE	3
Scottish Hydro	2
Swalec	2
Co-operative Energy	1
Ecotricity	1
First Utility	1
Marks & Spencer Energy	*
Ebico	*
Ovo	*
Sainsburys Energy	1
Spark Energy	*
Good Energy	-
Other	*
Don’t know	2

Base: All with mains gas and responsible for bills (1214)

OG55. **Do you have any long term physical or mental impairment which limits your daily activities or the work you can do?**[2]

	%
Yes	15
No	85

Base: All with mains electricity or gas and responsible for bills (1433)

[1] New question introduced in 2013
[2] New question introduced in 2013