

RESEARCH TO INFORM OFGEM'S REVIEW OF THE CHANGE OF SUPPLIER PROCESS. APPENDICES

RESEARCH MATERIALS AND SAMPLE BREAKDOWN

This appendix to the Ofgem Change of Supplier report includes the following key documents:

- **o** Discussion guides (Panel, recent switchers, ADM customers)
- Panel presentation
- Participant stimulus
- Achieved sample breakdown

DISCUSSION GUIDES

Ofgem Consumer First Panel

Panel workshop 2 – Smarter markets – Change of Supplier (CoS) process FINAL

INTERNAL/CLIENT USE ONLY

The overall objectives for the Smarter Markets research are:

- To explore what characteristics consumers value in a future Change of Supplier (CoS) process and what different value consumers attach to these characteristics
- To better understand how different factors relating to the CoS process influence, or are likely to influence, engagement with the market

Timing	Exercises / activities	Comments
15 MINS	Introduction:	
	AIM: Welcome back Panellists, recap on previous workshop findings,	
	update on Ofgem's ongoing work and introduce new topic for the	
	evening.	
15 MINS	Section 1: General discussion of switching energy supplier and the	
	(CoS) process	
	AIM: to briefly understand spontaneous views of switching energy	
	supplier. To understand spontaneous views of the CoS process and	
	which characteristics are perceived to be good and bad	
201400	Section 2: Detailed discussion of views of ideal CoS process	
20 MINS	AIM: to understand:	
	the value attached to different characteristics of the CoS process	
	 perceptions of possible issues that could occur during the 	
	actual CoS process and level of importance of each; and	
	allow participants to put forward ideas for improvement	
	Section 3: Discussion on the importance of speed in the CoS process	
20 MINS	AIM: to understand importance of speed in the CoS process	

15 MINS	BREAK	
T2 INIIN2	BREAK	
	Section 4: Discussion of cooling-off period	
20 MINS	AIM: to explore to what extent the cooling-off period changes preferences	
	around the optimum time for the CoS process	
20 MINS	Section 5: Introduction to and discussion of Smart Meters	
	AIM: to explore perceptions of Smart Meter roll-out and impact on	
	customer expectations of CoS process	
10 MINS	Section 6: Top three improvements	
	AIM: to allow participants to comment on what they have discussed	
5 MINS	Section 7: Close	
	AIM: to bring the Panel to a close	
17.45-18.15	Arrival and Registration	
	Pre-workshop poster activity	
	A number of themed posters will be arranged on the walls in the workshop	
	venue and Panellists will be asked to write their thoughts on these posters.	
	Moderators/note-takers keep an eye on what is being written on the	
	posters and ask Panellists to explain/elaborate on anything that is unclear.	
	Potential themes for posters:	
	• What things come to mind when you think about changing your energy supplier? What else?	
	• What is/do you think is easy about changing energy supplier? What else?	
	• What is difficult/do you imagine being difficult? What else?	
	• How do you think the process could be improved?	
18.15-18.30	PLENARY Introduction	
10.13 10.50	Lead moderator to welcome, introduce the team and clients (as	AIM: Welcome back
15 MINS	applicable), housekeeping. Reassure Panellists that everything they have	Panellists, recap on
	written on the posters will be reflected in the report and fed back to	previous workshop
	Ofgem.	findings, update on
	Recap from Ipsos MORI chair about the Panel and how it operates.	Ofgem's ongoing work and introduce new
	Show slides which recap on findings from previous round of workshops,	topic for the evening
	and explain how Ofgem have used/are using the findings). Using same	
	slide explain how Ofgem uses findings from the Panel and Ofgem's	NP, Don't introduce
	ongoing work for consumers, particularly around the RMR, and how this	NB: Don't introduce any of the steps
	aims to address the problems in the current market that consumers say	between the beginning
	occur i.e. simpler, clearer, fairer.	and end of the CoS
		process until plenary in
	Using slide explain that tonight we are mainly talking about the Change of	section 2
	Supplier process and explain using slide it is the process between the point	
L .	at which an energy customer agrees contract with a new supplier and the	

	point at which the transfer to a new supplier is complete (i.e. nothing to do	
	with choosing a tariff/supplier).	
	Show slide on the consumer path to engagement in the energy market.	
	Clearly point out where the CoS process sits in the journey	
	Tonight's discussion is really important as Ofgem would like to know what	
	consumers like you think about the Change of Supplier process.	
	STILL IN PLENARY moderator explains we'd now like you to think about	
	the speed of the Change of Supplier process	
	the speed of the change of supplier process	
	Hand-out an ideas book to each Panellist instructing them to work	
	individually.	
	Lead moderator re-visits slide with CoS process (with each of the steps in	
	between beginning and end of the process blanked out) explain we want	
	them to think about the process between the point at which an energy	
	customer agrees contract with a new supplier and the point at which the	
	transfer to a new supplier is complete (i.e. nothing to do with choosing a	
	tariff/supplier).	
	In your <u>ideas book write-down</u>	
	How long you think it does take? IF NEEDED "the transfer".	
	Anyone want to shout out what they wrote? How did you come up with	
	that? PROBE personal experience, word of mouth	
	Moderators on tables, FLIPCHART responses.	
	Moderators on tubles, FLIFCHART responses.	
18.30-	Section 1: General discussion of changing energy supplier and the CoS	AIM: to understand
8.50	process	spontaneous views of
0 MINS		changing energy
	IN TABLES	supplier and the CoS
		process and which
	Quick re-introductions around the table: First name, household	characteristics are
	composition, ever <u>switched tariff/supplier</u> and (if switched) how	perceived to be good
	recently	and bad
	Keep discussion very open at this stage, gather as many views as possible	
	of Panellists perceptions of changing supplier i.e. the entire consumer	
	journey, what factors help or hinder a switch and ideas for how to	
	improve	
		Bulleted qs are
	REASSURE PANELLISTS:	designed as a grump-
	This does not need to be based on your personal experience, the aim of	dump (concerns and
	this discussion is to understand how you imagine the process to be, what	issues people have re:
	were house housed from others, whet were support housed on supervisioness of the	pricing, tariffs etc)
	you have heard from others, what you expect based on experiences of the	Probe if mention of

FLIPCHART responses.

Shout out:

- What things come to mind when you think about changing your energy supplier? What else?
- What is/do you think is easy about changing energy supplier? What else?
- What is difficult/do you imagine being difficult? What else?
- How do you think the process could be improved?

Moderator explain past research has already covered issues and concerns relating to the earlier stages of the consumer journey and Ofgem's RMR work should resolve a lot of these. <u>Therefore we want to hear what you</u> <u>have to say on the final stage/ the actual point of transferring from one</u> <u>supplier to another, as this is something that hasn't previously been</u> <u>explored in detail.</u>

It is really important that by the end of tonight's discussion we have a clear idea about the best possible CoS process as this is the only way we can give Ofgem a good chance of working to improve it for all customers. So tonight we are asking you to work a bit and use your imagination!

Just before we discuss the best possible CoS process in more detail, I'd first like you to shout out what you think the Change of Supplier process involves? Why do you say that?

Who do you think is involved in this process, and what is going on? Why do you say that? PROBE: personal experience of a switch of energy supplier, word of mouth, experience of switching in other markets, other experiences of the energy market, supplier communications, media.

FLIPCHART RESPONSES

Now I'd like us to think about other markets where you might transfer from one provider to another – at the point when the consumer formally agrees to transfer to a new provider and ending when the consumer receives a closing bill from their existing provider – and how this compares with the energy market.

- What works in other markets? Why? What doesn't? (briefly probe using prompts above timing is the key one)
- How does this compare with the energy market?

(IF NEEDED) PROMPT WITH:

- Amount of time taken between agreeing to transfer to a new supplier and completion of the transfer
- Level of contact with supplier staff

CoS process e.g. what and how heard <u>BUT</u> don't ask them to make a comparison between CoS process and earlier stages of consumer journey

Briefly explore what different consumers know about the CoS process. Knowledge or lack of knowledge of the steps in between may have an important bearing on their view of what comes later e.g. what's is/isn't reasonable in terms of timing.

	Potential errors / increased contact from supplier	
	• Type of communication (phone, email, letter)	
	Quality / type of customer service	
	• Amount / type of input needed from consumer (phone calls,	
	emails / checking paperwork or online for energy usage data	
	or account information / supplier requesting additional	
	information e.g. your meter serial number)	
	Moderator note: the key markets for comparison are where someone is	
	switching mobile phone provider but keeps the same number rather than	
	someone buying a new phone with a new number / where someone is in	
	the process of switching their primary bank account.	
	Now coming back to the Change of Supplier process in the energy market.	
	We discussed earlier how long you think it currently takes, but how long	
	do you think it <i>should</i> take to transfer from your existing supplier to	
	another?	
	Imagine you were in charge of setting the rules that regulate this	
	process, what timescales would you put in place?	
	Ask them to return to their ideas book and on the second page write	
	down how long they think the transfer should take.	
	Anyone want to shout out what they wrote? How did you come up with	
	that?	
	Moderators on tables, FLIPCHART responses and probe for reason(s).	
18.50-19.15	Section 2: Detailed discussion of views of ideal CoS process	AIM: to understand:
		the value
	PLENARY	attached to
25 MINS	Using a single slide lead moderator spends 5 min talking through the	different
	discrete steps in between the 'beginning' and 'end' of the Change of	characteristics
	Supplier process. Moderator leaves slide showing on screen.	of the CoS
		process
	IN TABLES	perceptions of
		possible issues
	We've talked about what you expect the Change of Supplier process	that could
	to involve, now you can see the key stages of how it works in reality,	occur during
	what do you think?	the actual CoS
		process and
	Are you surprised by anything? What? Why?	level of
	Does it seem more or less complicated than what you expected, or	importance of
	about the same? Why?	each; and
	Which bits are you OK with? Which not?	≻ allow
	Which seem problematic? Why?	participants to
		put forward
	Split into 3 mini-groups and ask them to revisit their ideas book and	ideas for

process in the energy market. <u>In thinking about the ideal process, prompt</u> <u>them to think about what's going on at each stage for the key players</u> <u>involved, including the customer.</u>

After 5-7 minutes:

In turns, one spokesperson from each group presents back their "ideal" process. Probe fully to get clear picture from each group and invite other Panellists to share their views.

DISCUSS how Panellists have prioritised different features. Moderator flipcharts discussion.

 Now thinking of everything that could potentially be an issue / go wrong with the CoS process

Tell me what you think could potentially go wrong about the CoS process. FLIPCHART AND PROBE FULLY TO GET CLEAR PICTURE FROM EVERYONE ABOUT WHAT THEY CONSIDER MAJOR / MINOR ISSUES. This is a quick spontaneous exercise quickly move them on to 2.

2) I'd now like you to consider examples of potential issues related to the CoS process in more detail.

Handout stimulus showing examples of potential issues, including:

- Long process
- Lots of involvement from consumer
- Lots of contact from supplier(s)
- Lack of contact from supplier(s)
- Existing supplier prevents you from transferring
- When a supplier transfers a customer that has not agreed to transfer and does not want to transfer i.e. <u>erroneous</u> <u>transfer</u>
- Hassle factor (<u>PROBE around what they consider hassle</u>)
- Errors and delays in getting the final bill from the old supplier
- Anything else?

Working individually we would like you to think about what you consider a 'deal breaker' i.e. would make you reverse your decision to switch supplier / not consider switching in future and what is just annoying i.e. 'a niggle'. MODERATOR ENSURES PARTICIPANTS UNDERSTAND WHAT IS MEANT BY DEAL BREAKER/ NIGGGLE

Give Participants 5 minutes to consider these issues annotate ideas booklet.

 Anything they consider a 'deal-breaker' i.e. something that would put them off switching again

	- Anything that is a 'niggle' and would be annoying but that	
	they could live with and would not put them off switching now or in future	
	Then ask participants to present ideas back to the group and DISCUSS. PROBE where participants mention 'hassle factor' to understand what sorts of things they consider a hassle.	
	Finally, if you imagine that the whole process went as well as it possibly could, if it looked like what you just designed, what difference would it make to you? e.g. likelihood of switching in the future	
19.15-19.40	Section 3: Discussion on the importance of speed in the CoS process	AIM: to understand
	Section 5. Discussion on the importance of speed in the cos process	importance of speed in
25 MINS	IN TABLES	CoS process
	Moderator note: the focus here is speed alone therefore any mention of cooling-off period should be noted and parked. You can explain that the cooling off period will be discussed at length in the following section but for now want them to imagine a scenario where the cooling off period doesn't exist as we want views on how long their ideal transfer should take.	
	The aim of this section is to understand Panellists expectations of how long the process <u>should</u> take and what impact any reduction in time would make on how they view the Change of Supplier process i.e. <u>Will</u> <u>it make them more likely to switch in future? When would they start to</u> <u>feel frustrated that the process is taking too long?</u>	
	Moderator explains that a typical time frame is five weeks (if everything goes right) from the point at which you tell your new supplier you want to change to the day you are fully transferred over and become their customer (and an ex-customer of your old one).	
	What do you think of the process lasting about five weeks? PROBE: Long / about right / not bothered? Does the time it takes matter? Why? Would it make a difference to your decision to switch?	
	It is vital that each timescale is discussed individually therefore write up one possible timeframe for Panellists to consider at a time. Table 1 goes from 3 weeks to next day and table 2 goes through in reverse order	
	 3 week 2 week 7 days 2 days Next day 	

	DISCUSS as a group. Try and gauge what Panellists see as below	
	expectations / meeting expectations / exceeding their expectations.	
	PROBE on perceived problems or benefits for each of the timescales	
	PROBE FULLY around consumer expectations. NOTE this is a key area of interest for OFGEM:	
	Is 3 weeks really an improvement on 5 weeks?	
	What about 2 weeks? 1 week? 2 days? Next day?	
	When does it start to make a difference to you?	
	Why is the time it takes important?	
	Can you try and imagine how you would feel / remember how you	
	have felt if it takes too long? How long is too long?	
	Can you think of any circumstances which might alter how fast you	
	want your switch to happen? In what way would they make a	
	difference? FLIPCHART RESPONSES.	
	PROMPTS IF STRUGGLING:	
	Recently moved into a new property	
	 An existing fixed term contract is coming to an end 	
	Poor customer service	
	Take advantage of a better deal i.e. saving	
19.40-19.55	BREAK_	
19.55-20.15	Section 4: Discussion of cooling-off period	AIM: to explore to what
20 MINS		extent the cooling off
	Moderator note: in discussing the cooling off period some participants	period changes
	may decide they encountered poor customer experience during a switch	preferences around the
	of supplier which having reflected on it think Ofgem should look into it.	optimum time for the Co
	If this happens then you can mention they should speak with their	process
	supplier in the first instance and then the energy ombudsman if still not	
	satisfied. Stress that Ofgem does not deal with complaints.	
	PLENARY	
	Welcome back. Before the break we talked about timings for the change	
	of supplier process and how important they are to you. For those of you	
	who felt that the change of supplier process should be completed in two	
	weeks or less, there is another factor to bear in mind.	
	Using plenary slide deck slides lead moderator explains energy suppliers	
	are required to provide customers with a 'cooling-off period'.	
	The next part of our discussion is about whether or not, thinking about	
	The next part of our discussion is about whether or not, thinking about the next time you switch, you would prefer to waive your cooling off	
	The next part of our discussion is about whether or not, thinking about	

IN TABLES	
SPONTANEOUS responses to what they have just heard in plenary	
What do you think about the idea of waiving your cooling off period?	
PROBE FULLY AND FLIPCHART responses	
If asked then moderators explain that currently all customers have	
the option of waiving the cooling-off period.	
Moderator note: listen out to see how much appetite there is for	
reducing timescales by waiving the cooling off period. Do Panellists	
immediately like the idea of being able to speed the process up by	
waiving their cooling off period? Do they even see it as a real	
advantage?	
Consider a set for a significant in the of the order states and	
Spend the next few minutes thinking of the advantages and	
disadvantages of waiving your cooling-off period. Think back to our	
previous discussion about timing and how important or not important	
that was to you. You might not see the point of waiving the cooling off	
period, that's fine. Or you might think it is a really great idea. We	
don't have to agree on this!	
Return them to their ideas book and ask them to work individually	
and write down what could be the pros and cons in the relevant	
boxes.	
Invite a few people to present ideas back to the group and ask other to	
share their views. PROBE FULLY.	
IN TABLES	
Do you think you would like to waive it if doing so could allow you to	
switch in:	
a) 1 week	
b) 3 days	
c) Next day?	
Earlier we talked about some circumstances which might affect how	
fast you want a switch to happen. [refer to flipchart e.g. take	
advantage of saving, poor customers experience, moving home, end	
of fixed term deal].	
Would any of them make a difference to your decision about whether	
or not to waive your cooling off period? In what way would they make	
a difference?	
KEEP FLIPCHART ANSWERS UP AND ENCOURAGE PANELLISTS TO	
REFER BACK TO THEM	

20.15-20.35	Section 5: Introduction to and discussion of Smart Meters	AIM: to explore
20 MINS	<u>PLENARY</u>	perceptions of Smart Meter roll-out and
	Something else that is changing in the energy market is the introduction	impact on customer
	of Smart Meters.	expectations of CoS
	Lead moderator asks for quick show of hands 'Who has heard of Smart	process
	<i>Meters</i> ? Lead asks one Panellist per table to explain to the whole group what they understand by 'Smart Meter' (SM)	
	 Lead moderator presents slide on Smart Meters, includes: <u>Functionality:</u> image of how they look, diagram of where they are placed in your home, how they are/look different to real time displays (RTDs), how consumers interact with them – read off usage from in-home displays (IHDs), how suppliers interact with them – consumption data is sent directly <u>Roll-out:</u> show bar chart with planned dates for roll-out, flag the fact that not everyone will receive SMs at same time 	
	IN TABLES	
	What do you think of what you just heard? Does anyone know they have a SM? In general, do they sound like a good thing? Bad thing? Not bothered? Why? PROBE FULLY	
	What difference do you think having a SM would make to you? (Keep brief	
	as past research covers experience of using SMs and installation process)	
	Can you think of any advantage it would have? Any disadvantage? Do you think it would make any difference to the process of switching your supplier?	
	Remind Panellists that having a smart meter could speed up the process of changing supplier e.g. remotely take a meter reading	
	What do you think about the fact a SM could speed the process up?	
	Would that be important to you? Why? If not, why do you say that? Remind Panellists of earlier views on the importance of speed of process.	
	With a SM installed it might be the case that you could change supplier in a matter of a few days or even next day. <i>How would you feel about</i>	
	waiving the cooling off period then?	
	What about the fact a SM could allow an accurate closing bill to be produced by your existing supplier more quickly? What about the fact a SM could allow an accurate opening meter read provided to your new supplier?	
	<u>What impact would this have on your attitude to the energy market?</u> THEN PROBE with switching? More / less likely to in future? <i>Remind</i>	

20.35-20.45	 Over the next 6 years suppliers will be installing Smart Meters in homes across the UK. The cost of SM roll out and installation is being spread across all consumers No-one has to have one if they don't want one It is going to take time before the majority of GB households have SMs installed Section 6: Top three improvements_ 	AIM: to allow participants to commen
	What, if any, effect do you think the introduction of SMs will have on the change of supplier process overall? Why? If you had one would it make you think or act any differently in relation to changing your supplier? Why / why not? PROBE Moderator key facts (in case questions around SMs come up):	
	What will it mean for how different consumers experience the CoS process? What if the process stayed the same for everyone until roll-out was complete? Which is the better option? Why? Is fairness important in this context? Why? PROBE fully around fairness of different options	
	Now thinking about the plans for rolling out Smart Meters to GB homes. You can see that not every household will receive their meter at the same time. What do you think about this? Why?	
	To what extent do these things make you want a SM in your home? If not, why not? Is / is not speed of switching / reliable process a significant advantage for you?	

20.45-20.50	WIND DOWN	AIM: to bring the Panel
5 MINS	<u>PLENARY</u>	to a close
	Lead moderator explains that findings from this round of workshops will help inform Ofgem's work around improving the Change of Supplier process.	
	Thanks and reminder of the next workshops and between event contact from Ipsos MORI	
	Circulate evaluation questionnaire – what can we improve next time?	

Ofgem Consumer First Panel

Smarter markets – Change of Supplier (CoS) process Recent Switchers FINAL

INTERNAL/CLIENT USE ONLY

The overall objectives for the Smarter Markets research with recent switchers are:

- To explore what characteristics recent switchers value in a future Change of Supplier (CoS) process and what different value recent switchers attach to these characteristics
- To better understand how different factors relating to the CoS process influence, or are likely to influence, engagement with the market

Timing	Exercises / activities	Comments
5 MINS	Introduction:	
	AIM: Explanation of Ofgem's role and remit. Introduce CoS process	
10 MINS	<u>Section 1: General discussion of recent switch</u> AIM: to understand experience of recent switch and which aspects are perceived	
	to be good and bad	
15 MINS	Section 2: Discussion of each stage of the CoS process	
	AIM: to understand experience of CoS process and which characteristics are	
15	perceived to be good and bad	
MINS	Section 3: Detailed discussion of views of ideal CoS process AIM: to understand:	
	the value attached to different characteristics of the CoS process	
	perceptions of possible issues that could occur during the actual CoS	
	process and level of importance of each; and	
	allow participants to put forward ideas for improvement	
15 MINS	Section 4: Discussion on the importance of speed in CoS process	
10 MINS	AIM: to understand importance of speed in CoS process	
	Section 5: Discussion of cooling-off period	
15 MINS	AIM: to explore to what extent the cooling off period changes preferences around	
20 11110	the optimum time for the CoS process	
	Section 6: Introduction to and discussion of Smart Meters	
5 MINS	AIM: to explore perceptions of Smart Meter roll-out and impact on customer	
5 1011105	expectations of CoS process	
	Section 7: Close	
	AIM: to bring the discussion to a close and allow participants to comment on what	
	they have discussed	

5 MINS	Arrival and Registration	
	Introduction	
	Lead moderator to welcome, introduce the team and clients (as applicable), housekeeping.	
	Introduce Ofgem and explain that Ofgem's on-going RMR work should make the market simpler, fairer, and clearer for consumers.	
	Explain that tonight we are mainly talking about the change of supplier process and explain using slide it is the process between the point at which an energy customer agrees to a contract with a new supplier and the point at which the transfer to a new supplier is complete (i.e. nothing to do with choosing a tariff/supplier).	NB: Don't introduce any of the steps between the beginning as we want them to write down their
	Tonight's discussion is really important as Ofgem would like to know what you thought about the Change of Supplier process, and what if anything, should be improved and the reasons for this.	own CoS process.
	Round-table introductions. First name, electricity only or both gas and electricity? When last switched your energy supplier? Roughly how many times, if at all, had you switched prior to that? Probe on timescales.	
10 MINS	Section 1: General discussion of recent switch	AIM: to understand
	Explain that participants were recruited because they shared one thing in common – all have recently switched their energy supplier. Before we look at what you thought about the CoS process in detail, we want to hear what you think about everything that was involved in your most recent switch.	experience of recent switch and which aspects are perceived to
	So, thinking about your most recent switch of energy supplier, I'd like to hear your views about your experiences.	be good and bad
	Can everyone explain to the group the reason or reasons which led them to switch their energy supplier? Was there one thing which prompted you to switch? What was it? If there were several reasons, what was the most important? Why? Is that the same/different for others?	
	How did you find the process overall? <i>flipchart responses probing on different steps along the consumer journey</i>	
	What effect do you think your experience has had on your likelihood to switch in the future? Was there anything that would put you off switching again? What was that?	
	Moderator explain past research has already covered issues and concerns relating to the earlier stages of the consumer journey and Ofgem's RMR work should resolve a lot of these. Therefore we want to hear what you have to say on the final stage/ the actual point of changing from one supplier to another, as this is something that hasn't previously been explored in detail.	
	Stress it is really important that by the end of tonight's discussion we have a clear	

	idea about the best possible CoS process as this is the only way we can give Ofgem a good chance of working to improve it for all customers.	
15 MINS	Section 2: Discussion of each stage of the CoS process	AIM: to understand
	Section 2. Discussion of each stage of the cos process	experience of CoS
	Now I'd like you to think back specifically to the change of supplier process – using slide explain it is the process between the point at which an energy customer agrees a contract with a new supplier and the point at which the transfer to a new supplier is complete (i.e. nothing to do with choosing a tariff/supplier).	process and which characteristics are perceived to be good and bad
	Hand out stimulus (journey map) and pens. Each participant spends 5 min drawing a journey map of each stage of the Change of Supplier process.	
	Ask them to write down what was involved during the process i.e. what was going on, what they did, how they did them, who helped them if anyone. Ask what they were thinking and feeling at each stage, and write their thoughts onto the journey map.	
	We are trying to build a picture of what this process looks like from the	
	interviewee's perspective and find the difficulties they may not express but may nevertheless face.	
	Ask one participant to take you through each step of their CoS process. At each stage invite others to comment on whether and why/why not had similar/different experience.	
	What was going at each stage? Is this what you expected? Were you surprised by anything? What? Why?	
	Are there certain things you thought went better than others? Which ones?	
	FOR ANYTHING THAT WENT WELL: Did that meet/exceed your expectation? Why do you say that?	
	FOR ANYTHING THAT WENT LESS WELL: How did that make you feel? What one thing helped you overcome that issue? What effect do you think that experience has on your decision to switch in future?	
	Moderator keeps probing until everyone has commented on their own journey.	
	(IF NEEDED) PROMPT WITH:	
	 Amount of time taken between agreeing to transfer to a new supplier and completion of the transfer Level of contact with supplier staff Potential errors / increased contact from supplier 	
	 Type of communication (phone, email, letter) Quality / type of customer service Amount / type of input needed from consumer (phone calls, emails / checking paperwork or online for energy usage data or account 	
	information / supplier requesting additional information e.g. your meter serial number)	

	How long did the change of supplier process take? Please write this down on your journey map. Is this what you expected? Imagine you were in charge of setting the rules that regulate this process, what timescales would you put in place?	
15 MINS	Section 3: Detailed discussion of views of ideal CoS process We've talked about what was involved in the Change of Supplier and your experiences of the different stages of it. Now I'd like you to think about whether any improvements are needed and the reasons for this.	AIM: to understand: the value attached to different characteristics of the CoS process
	Instruct them to revisit their journey map but remind participants to think about everything they have discussed so far but also anything else they think is relevant to the CoS process.	perceptions of possible issues that could occur during the actual CoS
	Hand out ideal process question sheet and explain to participants that they have a blank canvas to design the ideal change of supplier process in the energy market. In thinking about the ideal process, remind them to think about what's going on at each stage for the key players involved, including the customer. If needed – if you could start from scratch in designing an improved change of supplier process	process and level of importance of each; and allow participants to put forward
	After 5 minutes: Each participant presents back their "ideal" process. Probe fully to get clear picture and invite other participants to share their views.	ideas for improvement
	 DISCUSS how participants have prioritised different features. Moderator flipcharts discussion. 3) Now thinking of everything that could potentially be an issue / go warms with the CoS process. 	
	wrong with the CoS process. Tell me what did go wrong or could potentially go wrong about the CoS process. FLIPCHART AND PROBE FULLY TO GET CLEAR PICTURE FROM EVERYONE ABOUT WHAT THEY CONSIDER MAJOR / MINOR ISSUES.	
	This is a quick spontaneous exercise quickly move them on to 2.	
	Remind them that they don't have to agree, something might be more important to one person than another.	
	4) I'd now like you to consider examples of potential issues related to the CoS process in more detail.	
	Moderator doesn't show stimulus with each stage of the Cos process but simply reminds participants it is the point at which customer agrees to transfer with new supplier and ends when switch is complete. The purpose is to get them to think about what things could go wrong at each without being prompted on what they are. Handout stimulus showing examples of potential issues, including:	

	 Lots of involvement from consumer Lots of contact from supplier(s) Lack of contact from supplier(s) Existing supplier prevents you from transferring When a supplier transfers a customer that has not agreed to transfer and does not want to transfer i.e. erroneous transfer Hassle factor (PROBE around what they consider hassle) Errors and delays in getting the final bill from the old supplier Anything else? Moderator note customer would be rarely disconnected. Working individually we would like you to think about what you consider a 'deal breaker' i.e. would make you reverse your decision to switch supplier / not	
	<u>consider switching in future and what is just annoying i.e. 'a niggle'.</u> <u>MODERATOR ENSURES PARTICIPANTS UNDERSTAND WHAT IS MEANT BY DEAL</u> <u>BREAKER / NIGGLE</u>	
	Give Participants 5 minutes to consider these issues and annotate hand-out. Ask them to:	
	 Write down anything they think should be added to the list Write on hand-out anything they consider a 'deal-breaker' i.e. something that would put them off switching again AND WRITE DOWN REASON(S). Write on hand-out anything that is a 'niggle' and would be annoying but that they could live with and would not put them off switching now or in future AND WRITE DOWN REASON(S) 	
	Then ask participants to present ideas back to the group and DISCUSS. PROBE where participants mention 'hassle factor' to understand what sorts of things they consider a hassle.	
	Finally, if we imagine that the whole process went as well as it possibly could, if it looked like what you just designed, what difference would it make to you? PROBE: likelihood of switching supplier again in future	
15 MINS	Section 4: Discussion of the importance of speed of CoS process Moderator note: the aim of this section is to understand participants expectations of how long the process should take and whether that differs from their personal experience and what impact any reduction in time would make on how they view the switching process i.e. given they are switchers anyway would a quicker CoS process have any bearing on their decision to switch in future?	AIM: to understand importance of speed in CoS process
	Moderator note: The focus here is speed alone therefore any mention of cooling-off period should be parked. You can explain that the cooling off period will be discussed at length in the following section but for now want them to	

imagine a scenario where the cooling-off doesn't exist and how quickly they would want their ideal CoS process to be.

Can I check how long it took to complete your CoS process (refer to answers at section 1 and check they still stand now that they have talked more about what is involved). **PROBE: Long / about right / not bothered? Why?** How does the length of time it took affect your likelihood of switching in the future (if at all)?

Moderator explains that a typical time frame is five weeks (if everything goes right) from the point at which you tell your **new supplier** you want to switch to the day you are fully transferred over and become their customer (and an ex-customer of your old one).

What do you think of the process lasting about five weeks? How does this compare to your personal experience? Does the time it takes matter? Why? PROBE: Impact on likelihood of switching again in future.

It is vital that each timescale is covered individually therefore discuss each in turn (using questions below) before introducing the next. Write up timescale on flipchart.

- 3 week
- 2 week
- 7 days
- 2 days
- Next day

DISCUSS as a group. Try and gauge what Participants see as below expectations / meeting their expectations / exceeding their expectations.

PROBE FULLY around consumer expectations:

Is 3 weeks really an improvement on 5 weeks? What about 2 weeks? 1 week? 2 days? Next day? When does it start to make a difference to you? Why is the time it takes important?

Can you think of any circumstances where you might think the switch should happen quicker? In what way would that make a difference to you? FLIPCHART RESPONSES.

PROMPTS IF STRUGGLING:

- Recently moved into a new property
- An existing fixed term contract is coming to an end
- Poor customer experience
- Take advantage of a better deal i.e. savings.

10 MINS Section 5: Discussion of cooling-off period

AIM: to explore to

Moderator note: in discussing the cooling off period participants may decide they encountered poor customer experience during their switch which Ofgem should look into it. If this happens then you can mention they can speak to their supplier in the first instance and then the ombudsman if not satisfied. Stress that Ofgem does not deal with complaints.

For those of you who felt that the change of supplier process should be completed in two weeks or less, there is another factor to bear in mind.

Can I check whether anyone has heard of a cooling off period during the Change of Supplier process? Can anyone tell me what it involves? What do you think about the fact customers have a cooling off period? Why?

Even if everyone is familiar with cooling off period moderators explain that energy suppliers are required to provide customers with a 'cooling-off period'. In some instances this could be up to 14 days. This is as a way of allowing customers time to think about their decision to switch supplier and possibly change their mind. For the duration of the cooling off period you would remain with your old supplier. It is partly for this reason that the change of supplier process currently takes the time it does. If during this period, you decide that you no longer wish to change supplier, then you can cancel the process and remain with your old supplier.

If you want to 'waive' your cooling off period to enable you to change supplier in less than 14 days, for instance to start benefitting earlier from a better tariff or to be with the supplier of your choice when you move into a new premises, then you will need to tell your new supplier.

If you choose to waive your cooling-off period it doesn't stop you from being able to change back to your old supplier at some point in the future, but this could take some time as your old supplier will need to ask you to agree to their terms (which may have changed since you were last with them) and take you back through the transfer process. You are bound by the terms of your new contract in the meantime.

The next part of our discussion is about whether or not, thinking about the next time you switch, you would prefer to waive your cooling off period in order to switch supplier more quickly. Everyone has the choice whether or not to waive it, each time they change supplier.

What do you think about the idea of waiving your cooling off period? FLIPCHART responses. If asked then moderator explains that currently all customers have the option of waiving the cooling-off period.

Moderator note: listen out to see how much appetite there is for reducing timescales by waiving the cooling off period. Do participants immediately like the idea of being able to speed the process up by waiving their cooling off period? Do they even see it as a real advantage? Do you think your decision about whether to waive the cooling-off period cooling off period changes preferences around the optimum time for the CoS process

what extent the

	would change depending on how quickly it would enable you to change	
	supplier? Do you think you would like to waive it if doing so could allow you	
	to switch in:	
	d) 1 week	
	e) 3 days	
	f) Next day?	
	Earlier we talked about some circumstances which might affect how fast you	
	want a transfer to happen. [refer to flip chart] Would any of them make a	
	difference to your decision about whether or not to waive your cooling off	
	period? Given the fact they are already switchers in what way would that	
	make a difference?	
15 MINS	Section 6: Introduction to and discussion of Smart Meters	AIM: to explore
		perceptions of
	Something else that is changing in the energy market is the introduction of Smart	Smart Meter roll-
	Meters.	out and impact on
		customer
	Moderator asks for quick show of hands 'Who has heard of	expectations of CoS
	Smart Meters'? Asks one participant to explain to the	process
	whole group what they understand by 'Smart Meter' (SM)	
	Moderator presents slide on Smart Meters, includes:	
	<u>Functionality:</u> image of how they look, diagram of where they are placed in your home, how they are (look different to real time displays)	
	placed in your home, how they are/look different to real time displays	
	(RTDs), how consumers interact with them – read off usage from in-	
	home displays (IHDs), how suppliers interact with them –	
	consumption data is sent directly	
	• <u>Roll-out:</u> show bar chart with planned dates for roll-out, flag the fact that not everyone will receive SMs at same time	
	What do you think of what you just heard? Does anyone have a fully functioning	
	SM? In general, do they sound like a good thing? Bad thing? Not bothered?	
	Why? PROBE FULLY	
	Do you think having one would have made make any difference during your recent	
	switch? How so?	
	Explain how having a smart meter could speed up the process of switching supplier.	
	What do you think about the fact a SM could speed the process up? Would that be important to you? Why? If not, why do you say that? Would it make you more likely to change supplier in the future? <u>Remind participants of earlier views</u>	
	on the importance of speed of process.	
	With a SM installed it might be the case that you could change supplier in a matter of a few days or even next day. <u>How would you feel about waiving the cooling off period then?</u>	

	To what extent does the advantage of faster switching, more accurate bills and
	fewer errors in the transfer process make you want a SM in your home?
	If not, why not? Is / is not speed of switching / reliable process a significant
	advantage for you?
	Now thinking about the plans for rolling out Smart Meters to GB homes. Show slide on SMs. You can see that not every household will receive their meter at the
	same time. What do you think about this? Why?
	Do you think that customers with a smart meter should be able to have a faster
	and more accurate transfer process or should it be the same for all customers?
	Which is the better option? Why?
	Is fairness important in this context? Why? PROBE fully around
	fairness of different options
	Moderator key facts (in case questions around SMs come up):
	- Over the next 6 years suppliers will be installing Smart Meters in
	homes across the UK.
	- The cost of SM roll out and installation is being spread across all
	consumers
	- No-one has to have one if they don't want one
	It is going to take time before the majority of GB households have SMs installed
5 MINS	Section 7: Top three improvements and close
	Now, thinking of everything we have discussed so far, I want you to imagine that
	you are advising Ofgem on what things would want from a CoS process.
	Individually, system down on bond out the three most important things that you
	Individually, write down on hand-out the three most important things that you
	think need to happen. Think about what 'is really important to me' / 'doesn't
	think need to happen. Think about what 'is really important to me' / 'doesn't
	think need to happen. Think about what 'is really important to me' / 'doesn't make a difference' – you can write something we haven't discussed too! Ask one participant to read out what they wrote down and discuss and invite

Ofgem Consumer First Panel

Smarter markets – Change of Supplier process Smart Meter Customers FINAL

INTERNAL/CLIENT USE ONLY

The overall objectives for the Smarter Markets research with Advanced Domestic Meter Customers (<u>NB THESE</u> <u>CUSTOMERS HAVE ADVANCED DOMESTIC METERS RATHER THAN SMART ONES BUT WE ARE USING THE</u> <u>TERM "SMART" AS THEY ARE UNLIKELY TO RECOGNISE THE TERM "ADM</u>" are:

- To explore what characteristics smart meter customers value in a future Change of Supplier (Change of Supplier) process and what different value smart meter customers attach to these characteristics
- To better understand how different factors relating to the Change of Supplier process influence, or are likely to influence, engagement with the market given the current likelihood of losing smart meter functionality following a switch of supplier.

Timing	Exercises / activities	Comments
5 MINS	Introduction:	
	AIM: Explanation of Ofgem's role and remit. Introduce Change of Supplier	
	process	
	Section 1: General discussion of smart meters and brief discussion about	
15 MINS	changing supplier	
	AIM: to understand experience of using a smart meter and what are the	
	perceived pros and cons of having one and what impact a smart meter could	
	have on a switch	
	Section 2: General discussion on the Change of Supplier process	
15 MINS	AIM: to understand spontaneous views of the Change of Supplier process and	
	which characteristics are perceived to be good and bad	
20 MINS	Section 3: Detailed discussion of views of ideal Change of Supplier process	
	AIM: to understand:	
	the value attached to different characteristics of the Change of	
	Supplier process	
	perceptions of possible issues that could occur during the actual	
	Change of Supplier process and level of importance of each; and	
	> allow participants to put forward ideas for improvement	
	Section 4: Discussion on the importance of speed in Change of Supplier	
15 MINS	process	
	AIM: to understand importance of speed in Change of Supplier process	
15 MINS	Section 5: Discussion of cooling-off period	
	AIM: to explore to what extent the cooling off period changes preferences around	
	the optimum time for the Change of Supplier process	

5 MINS	Section 6: Close AIM: to bring the discussion to a close and allow participants to comment on	
	what they have discussed	
5 MINS	Arrival and Registration	
	Introduction	
	Lead moderator to welcome, introduce the team and clients (as applicable), housekeeping.	
	Introduce Ofgem and explain that Ofgem's on-going RMR work should make the market simpler, fairer, and clearer for consumers.	
	Explain that tonight we are mainly talking about the Change of Supplier process and explain using slide it is the process between the point at which an energy customer agrees to a contract with a new supplier and the point at which the transfer to a new supplier is complete (i.e. nothing to do with choosing a tariff/supplier).	NB: Don't introduce any of the steps between the beginning as we want them to
	Tonight's discussion is really important as Ofgem would like to know what consumers like you think about the Change of Supplier process, and what if anything, should be improved and the reasons for this.	write down their own Change of Supplier process.
	Round-table introductions. First name, electricity only or both gas and electricity? Can I just check when everyone had their smart meter installed? And what did you think about the fact you would be getting one? Why do you say that?	
L5 MINS	Section 1: General discussion of smart meters and brief discussion about	AIM: to
	changing supplier_	understand experience of
	Explain that participants were recruited because they share one thing in common – all have a type of "smart meter" installed in their homes. Before we look at the Change of Supplier process in detail, I'd like to hear your views about your experiences of having a smart meter	having a smart meter and what think are the pros and cons and
	Can someone explain to me what you think a smart meter is and what it does? What do others think?	brief Discussion about changing supplier
	What do you use it for? How often do you use it/look at it? IF USES: what does it tell you? IF DOESN'T USE: Why not used?	and what impact, if any, smart
	Thinking back to when you had your previous meter (i.e. non smart), do you do anything differently now that you have a smart one? e.g. take more of an interest in your energy options / billing, energy saving measures e.g. unplug appliances, buy more energy efficient appliances, lower thermostat	meters could have on the switch.
	What difference, if at all, do you think it has made in the way in which you deal with your energy supplier? e.g. querying billing. PROBE IF HASN'T MADE A DIFFERENCE	
	Hand-out ideas booklet and explain. I'd now like you to work in pairs and write- down in your booklets	

r		
	What do you think are the advantages / disadvantages of having a smart	
	meter? FLIPCHART RESPONSES	
	<u>Moderator note: in talking about the disadvantages of having a smart meter</u> <u>some participants might say they would have liked to switch supplier (e.g. to take</u> <u>advantage of a better tariff) but decided against it when they became aware the</u> <u>meter would lose its "smart" functionality. i.e. reverts to being a dumb meter</u> <u>WHETHER OR NOT THIS IS SPONTANEOUSLY MENTIONED BY PARTICIPANTS</u> <u>MODERATORS SHOULD SAY. For the rest of tonight's discussion we'd like you to</u>	
	imagine a scenario where you are able to switch supplier AND your meter retains its smart technology.	
	So thinking about such a scenario. What difference, if any would that have on your <u>decision</u> to switch energy supplier? Why do you say that?	
	What <u>effect,</u> if any, do you think a smart meter could have on changing your energy supplier?	
	Before we move on to discuss the process of transferring from the one to supplier to another i.e. the process which starts when energy customer agrees to a contract with a new supplier and ends when the transfer is complete	
	I'd like to hear what things come to mind when you think about changing your energy supplier? What else? What is/do you think is easy about changing supplier? What else? How do you think the process could be improved? What impact would that have on your decision to switch energy supplier in the future?	
	Moderator explains past research has already covered issues and concerns relating to the earlier stages of the consumer journey e.g. tariffs/pricing/information and Ofgem's RMR work should resolve a lot of these.	
	Therefore we want to hear what you have to say on the final stage/the actual point of changing from one supplier to another, as this is something that hasn't previously been explored in detail.	
15 MIN	Section 2: Brief discussion on the Change of Supplier process	AIM; to understand
	It is really important that by end of tonight's discussion we have a clear idea about the best possible Change of Supplier process as this is the only way we can give Ofgem a good chance of working to improve it for all consumers. So tonight we are asking you to work a bit and use your imagination! Moderator uses stimulus to explain that the Change of Supplier process starts when an energy consumer agrees a contract with a new supplier and ends at the point at which the transfer to a new supplier is complete i.e. nothing to do with	spontaneous views of the Change of Supplier process and which characteristics are perceived as good and bad
	choosing a tariff/supplier. Now I'd like you to work again in pairs and spend a couple of minutes discussing how long you think the Change of Supplier process <u>does</u> take? IF NEEDED "the transfer" Once you have agreed on a timescale I'd like one person from each pair to write down in your ideas book the timescale and the reasons for how you came up with that.	

Anyone want to shout out what they wrote? How did you come up with that? What did others think? PROBE: personal experience, word of mouth.

What do you think is involved in the Change of Supplier process? i.e. what would be going on, what it is they would do, how they would do it, whether and why/why not they would need help (and from whom). Why do you say that? PROBE: personal experience, of a switch of energy supplier, word of mouth, experience of switching in other markets, other experiences of the energy market.

Now I'd like us to think about other markets where you might transfer from one provider another – at the point when the consumer formally agrees to transfer to a new provider and ending when the consumer receives a closing bill from their existing provider – and how this compares with the energy market.

What works in other markets? Why do you say that? What doesn't? If struggling briefly prompt with (TIMING IS THE KEY ONE)

- Amount of time taken between agreeing to transfer to a new supplier and completion of the transfer
- Level of contact with supplier staff
- Potential errors / increased contact from supplier
- Type of communication (phone, email, letter)
- Quality / type of customer service
- Amount / type of input needed from consumer (phone calls, emails / checking paperwork or online for energy usage data or account information / supplier requesting additional information e.g. your meter serial number)
- How would you want to feel during the Change of Supplier process e.g. reassured, satisfied – probe any difference at certain steps during the process

How does this compare with the energy market?

Now coming back to the Change of Supplier process in the energy market. We discussed a few minutes ago how long you think it currently does take...

Now I'd like you to work again in pairs and spend a couple of minutes discussing how long do you think it should take to transfer from your existing supplier to another? *i.e.* the point at which an energy consumer agrees a contract with a new supplier and ends at the point at which the transfer to a new supplier is complete i.e. nothing to do with choosing a tariff/supplier.

Once you have agreed on a timescale I'd like one person from each pair to write down in your ideas book the timescale and the reasons for how you came up with that.

Anyone want to shout out what you wrote? How did you come up with that?

To explore what different consumers know about the Change of Supplier process. Knowldge or lack of knowledge of the steps in between may have an important bearing on their view of what comes later e.g. what is/isn't reasonable in terms of timing

	TER THEN ASK: Why do you say that? What do others	
	nart meter would make any difference to the process of	
changing your energy su	pplier? How? What do others think?	
IF DON'T MENTION OF S	MART METER THEN ASK:	
	rge of setting the rules that regulate this process, what	
timescales would you pu	It in place? Can someone shout out what they think?	
How did you come up w	ith that? What did others think?	
20 MINS Section 3: Detailed discu	ssion of views of ideal Change of Supplier process	AIM: to understand:
		the value attached
Using a single slide mode	rator spends 5 min talking through the discrete steps	to different
in between the 'beginnin	g' and 'end' of the Change of Supplier process.	characteristics of
		the Change of
We've talked about wh	at you expect the Change of Supplier process to	Supplier process
involve, now you can se	ee the key stages of how it works in reality, what do	
you think?		perceptions of
		possible issues that
Are you surprised by ar	nything? What? Why?	could occur during
	ess complicated than what you expected, or about the	the actual Change
same? Why?	• • • •	of Supplier process
Which bits are you OK	with? Which not?	and level of
Which seem problemat		importance of each;
p		and
Split into pairs and ask th	nem to revisit their ideas book and explain they have a	
	ne ideal Change of Supplier process in the energy	allow participants
-	t the ideal process, prompt them to think about what's	to put forward
	or the key players involved, including the customer. AT	ideas for
	DMPT THEM TO THINK ABOUT SMART METERS AS WE	improvement
	AND WHY/WHY NOT THEY IMAGINE A ROLE FOR THEIR	mprovement
	EAL Change of Supplier PROCESS	
SMART METER IN THE D	teac change of supplier Process	
After 5 minutes:		
In turns, one spokesperso	on from each pair presents back their "ideal" process.	
Probe fully to get clear pi	cture from each pair and invite others to share their	
views. DISCUSS how par	ticipants have prioritised different features. Moderator	
flipcharts discussion		
5) Now thinking a	of everything that could potentially be an issue / go	
, ,	e Change of Supplier process	
	ould potentially go wrong during the Change of	
Supplier process.		
FLIPCHART AND PROBE I	FULLY TO GET CLEAR PICTURE FROM EVERYONE ABOUT	
WHAT THEY CONSIDER N	MAIOR / MINOR ISSUES	
This is a quick spontaned	bus exercise quickly move them on to 2.	

6)	I'd now like you to consider examples of potential issues related to
	the Change of Supplier process in more detail.
Handout	stimulus showing examples of potential issues, including:
•	Long process
•	Lots of involvement from consumer
٠	Lots of contact from supplier(s)
•	Lack of contact from supplier(s)
•	Existing supplier prevents you from transferring
•	When a supplier transfers a customer that has not agreed to
	transfer and does not want to transfer i.e. erroneous transfer
•	Hassle factor (PROBE around what they consider hassle)
•	Errors and delays in getting the final bill from the old supplier
•	Anything else?
	pairs and spend two minutes thinking about what you consider a 'deal i.e. would make you reverse your decision to switch supplier / not
consider	switching in future and what is just annoying i.e. 'a niggle'.
BREAKER	ATOR ENSURES PARTICIPANTS UNDERSTAND WHAT IS MEANT BY DEAL R/ NIGGLE
Give Part	icipants 5 minutes to consider these issues and annotate ideas booklet.
-	Anything they consider a 'deal-breaker' i.e. something that would
	reverse your decision / put them off switching again
-	Anything that is a 'niggle' and would be annoying but that they
	could live with and would not put them off switching now or in
	future
	a different spokesperson from each pair to present ideas back to the d DISCUSS.
PROBE w	here participants mention 'hassle factor' to understand what sorts of
<u>things th</u>	ey consider a hassle.
<u>PROBE w</u>	here participants mention smart meter to understand whether and
why/why	not they think a smart meter could resolve some of the things that could
<u>go wrong</u>	<u>?</u>
	ONED THEN ASK How does having a smart meter make you feel/think
about th	e Change of Supplier process?
<u>AT THIS I</u>	POINT IT IS REALLY IMPORTANT TO REMIND PARTICIPANTS TO THINK
	NARIO WHERE THEY CAN SWITCH AND THEIR SMART METERS RETAINS
ITS SMAR	RT FUNCTIONALITY.
What dif	ference would that make on your decisions to transfer supplier /

	switch in future?	
	IF NOT MENTIONED THEN EXPLAIN BECAUSE OF THE WAY SUPPLIERS INTERACT WITH SMART METERS IE. CONSUMPTION DATA IS SENT DIRECTLY IT WOULD MEAN YOU'D HAVE AN ACCURATE CLOSING BILL AND THERE COULD BE FEWER ERRORS IN THE TRANSFER PROCESS.	
	What do you think of what you just heard? Why?	
	To what extent does a more reliable Change of Supplier process change your attitude to the energy market? PROBE with switching supplier – more/less likely.	
	You already said earlier about how you might or might not use your in-home display of your smart meter and just now we have talked some of the things that could go wrong during the Change of Supplier process, so now we would like you to think about something else that could happen as a result of having a smart meter in your home. Moderator reads out in order to avoid the wrong customers being transferred to different suppliers or to different contracts when they haven't asked to be, one solution would be a system where the supplier phones up a customer wishing to switch, sends a remote message to their meter, and asks them to confirm they've got the message, before making the supplier transfer.	
	What do you think about this arrangement/system? Does anything immediately strike you as good/ bad about it? Why do you say that? What difference would this have on your attitude to switching your energy supplier?	
	If you imagine that the whole process went as well as it possibly could, if it looked like what you just designed, what difference would it make to you? e.g. likelihood of switching in the future	
15 MINS	Section 4: Discussion of the importance of speed of Change of Supplier process	AIM: to understand importance of
	Moderator note: the focus here is speed alone therefore any mention of cooling-off period should be noted and parked. You can explain that the cooling-off period will be discussed at length in the following section but for now we would like them to <u>imagine a scenario where the cooling off period</u> <u>doesn't exist as we want to hear views on how long their ideal transfer should</u> <u>take.</u>	speed in Change of Supplier process
	The aim of this section is to understand participants expectations of how long the process <u>should</u> take and what impact any reduction in time would make on how they view the switching process. i.e. will it make them more likely to switch in future? When would they start to feel frustrated that the process is taking too long?	

right) from the point at which you tell your **new supplier** you want to switch to the day you are fully transferred over and become their customer (and an ex-customer of your old one).

What do you think of the process lasting about five weeks? Does the time it takes matter? Why? Would it make a difference to your decision to switch?

It is vital that each timescale is discussed individually therefore each possible timescale should be introduced separately. In turn write up possible time frames on FLIPCHART for Participants to consider

- 3 week
- 2 week
- 7 days
- 2 days
- Next day

DISCUSS as a group. Try and gauge what Participants see as below expectations / meeting expectations / exceeding expectations.

PROBE FULLY around consumer expectations:

Is 3 weeks really an improvement on 5 weeks? What about 2 weeks? 1 week? 2 days? Next day? When does it start to make a difference to you? Why is the time it takes important?

What do you think of the process lasting about five weeks? Does the time it takes matter? Why? Would it make a difference to your decision to switch?

Can you think of any circumstances which might alter how fast you want your switch to happen? In what way would they make a difference? FLIPCHART RESPONSES.

PROMPTS IF STRUGGLING:

- Recently moved into a new property
- An existing fixed term contract is coming to an end
- Annoyed with current supplier
- Want to start to benefit from a better tariff

<u>Remind them to imagine a scenario where you are able to switch supplier</u> <u>AND your meter retains its smart technology</u>, do you think this scenario would make any difference to the speed of transferring from one supplier to another? Why do you say that? Is that a good thing? Bad thing? Not bothered?

Explain that having a smart meter could speed up the process of changing supplier e.g. remotely take a meter reading.

What do you think about the fact a SM could speed the process up? Would

15 MINS	Do you think that customers should be able to have a faster and more accurate transfer process as soon as they get a smart meter, or should the process be the same for everyone until roll-out was complete? Which is the better option? Why? Is fairness important in this context? Why? PROBE fully around fairness of different options Section 5: Discussion of cooling-off period We have just talked about timings for the Change of Supplier process and how important they are to you. For those of you who felt that the change of supplier process should be completed in two weeks or less, there is another factor to bear in mind. Can I check whether anyone has heard of a cooling off period during the Change of Supplier process? Can anyone tell me what it involves? What do you think about the fact customers have a cooling off period? Why?	AIM: to explore to what extent the cooling off period changes preferences around the optimum time for the Change of Supplier process and explore perceptions of
	Using stimulus explains energy suppliers are required to provide customers with a cooling off period. <u>Remind them to imagine a scenario where you are able to switch supplier AND your meter retains its smart technology.</u> The next part of our discussion is about whether or not, thinking about the next time you switch, you would prefer to waive your cooling off period in order to switch supplier more quickly. Everyone has the choice whether or not to waive it, each time they change supplier. What do you think about the idea of waiving your cooling off period? FLIPCHART responses	impact of having a smart meter on views of cooling off period.
	Moderator note: listen out to see how much appetite there is for reducing timescales by waiving the cooling off period. Do participants immediately like the idea of being able to speed up the process by waiving their cooling off period? Do they even see it as a real advantage?	

	Working in pairs I'd now like you to discuss what could be the advantages and	
	disadvantages of waiving your cooling-off period and write down your	
	thoughts and how you came up with that in your ideas booklet.	
	With a SM installed it might be the case that you could change supplier in a	
	matter of a few days or even next day. How would you feel about waiving the	
	<u>cooling off period then?</u> Why do you say that?	
	Do you think you would like to waive it if doing so could allow you to switch in:	
	g) 1 week	
	h) 3 days	
	i) Next day?	
	.,	
	Earlier we talked about some circumstances which might affect how fast you	
	want a transfer to happen. [refer to flip chart]	
	Would any of them make a difference to your decision about whether or not	
	to waive your cooling off period?	
5 MINS	Section 6: Final thoughts and close	
	Based on everything you've heard and thought about tonight, what, if any, effect	
	do you think the introduction of SMs will have on the change of supplier process	
	overall? Why? Do you think that having one makes you think or act any differently in relation to changing your supplier? Why / why not?	
	unrerently in relation to changing your supplier? Why 7 why hot?	
	IF WOULDN'T MAKE A DIFFERENCE ASK DOES YOUR VIEW CHANGE IF YOU	
	COULD SWITCH AND KEEP YOUR SMART METER I.E. COMMUNICATES DIRECTLY	
	WITH NEW SUPPLIER. Why do you say that?	
	Now thinking of everything we have discussed so far, I want you to imagine	
	that you are advising Ofgem on what things you would want from a Change of	
	Supplier process.	
	In pairs, write down in your ideas book the three most important things that you	
	think need to happen. Think about what is 'is really important to me' / doesn't	
	make a difference' – you can write something we haven't discussed too!	
	Ask a spokesperson from each pair to read out what they wrote down and discuss	
	and invite others to share their views.	
	Moderator explains that findings from tonight's discussion will help inform	
	Ofgem's work around improving the Change of Supplier process.	
	Thanks and close	

PANEL PRESENTATION



Thank you for being a part of the **Ofgem Consumer First Panel**

Welcome back!

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Social	Research	Institute		
) Ipsos	MORI			

What is the Ofgem Consumer First Panel?

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- 100 people (Panellists) from different backgrounds across GB taking part in a series of events to think about and discuss GB's energy issues
- Membership of the Panel helps Ofgem better understand the views of energy consumers in Great Britain
- Thank you for coming back after the last workshop – we're looking forward to hearing your views again tonight!



Wrexham Birmingham London Southampton

Dundee

What will happen this evening?

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- Discussions on
 - your thoughts about Great Britain's energy market
 - your views on the process of changing your energy supplier
 - your ideas for how to improve it
- Like last time, we'll be doing this through...
 - presenting information
 - table discussions
 - group and pair work



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How does the Panel help Ofgem?

• Your input is important. It helps Ofgem to ensure that the views of consumers (like you) are included in their policy making decisions

- The previous session (held in January) helped Ofgem understand what support energy companies should provide and who should get it. We discussed the Priority Service Register for vulnerable customers. Overall, you told us that...
 - Some currently ineligible people such as those with learning or mental health issues should be eligible for extra support
 - Energy companies should publicise their extra support for vulnerable people to make sure that people receive the support they need
 - You also told us about your concerns about the energy market. Ofgem's ongoing Retail Market Review work should make the market simpler, clearer, fairer for consumers

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How will tonight's discussion help Ofgem?

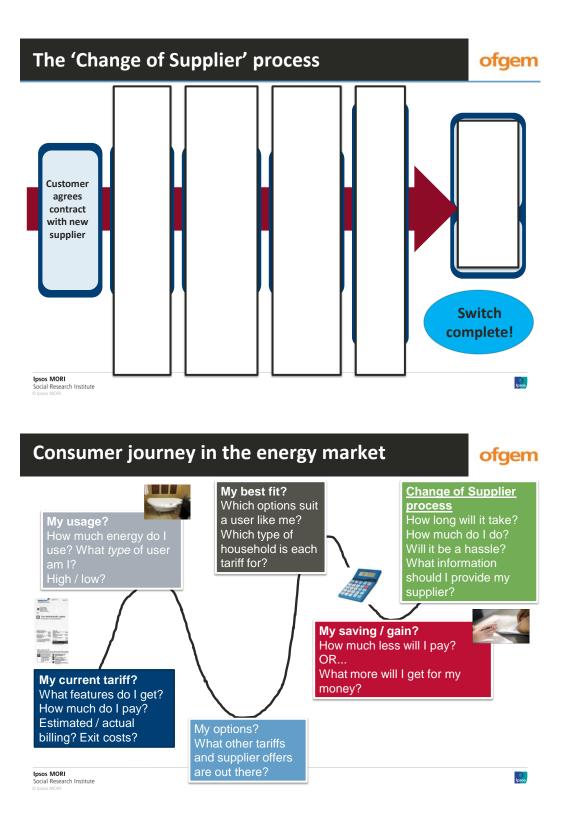
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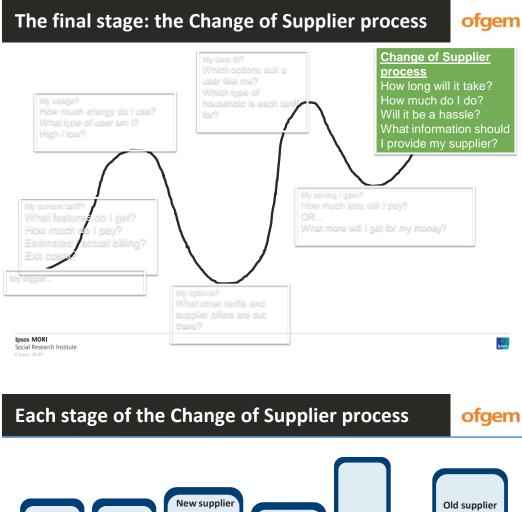
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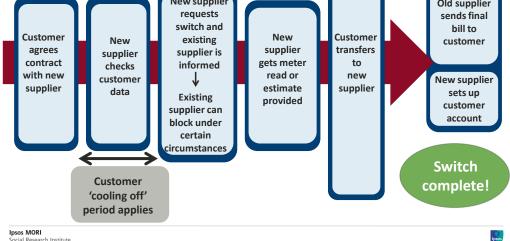
- Ofgem is currently looking at how to make the customer transfer from one energy supplier to another better for consumers. Let's call this the Change of Supplier (CoS) process. This is what we will be talking about tonight
- Tonight's workshop (and those taking place at 5 other locations across GB) will help Ofgem:
 - Understand what you think the Change of Supplier process should be like in the future
 - Make decisions about how the Change of Supplier process can be improved so that consumers have a better experience of the energy market
 - To take a full part you do not need to have had personal experience of changing your energy supplier. The aim of tonight is to understand how you imagine the CoS process to be and what you would expect a future process to look like

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PARTICIPANT STIMULUS







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Things that can go wrong with the CoS process

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- Long process
- Lots of involvement from consumer
- Lots of contact from supplier(s)
- Lack of contact from supplier(s)
- Existing supplier prevents you from switching
- When a supplier transfers a customer that has not agreed to a transfer and does not want to transfer
- Hassle factor what does this mean to you?
- Errors and delays in getting the final bill from the old supplier
- Anything else?

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Change of Supplier 'cooling-off' period

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- Energy suppliers are required to provide customers with a 'coolingoff period'. In some instances this could be up to 14 days. This is as a way of allowing customers time to think about their decision to switch supplier and possibly change their mind.
- For the duration of the cooling off period you would remain with your old supplier. It is partly for this reason that the change of supplier process currently takes the time it does.
- If during this period, you decide that you no longer wish to change supplier, then you can cancel the process and remain with your old supplier.

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Change of Supplier 'cooling-off period'

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- If you want to 'waive' your cooling off period to enable you to change supplier in less than 14 days, for instance to start benefitting earlier from a better tariff or to be with the supplier of your choice when you move into a new premises, then you will need to tell your new supplier.
- If you choose to waive your cooling-off period it doesn't stop you from being able to change back to your old supplier at some point in the future, but this could take some time as your old supplier will need to ask you to agree to their terms (which may have changed since you were last with them) and take you back through the transfer process. You are bound by the terms of your new contract in the meantime.

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Smart Meters for every GB home

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- Smart meters are the next generation of gas and electricity meters
- Smart meters tell consumers how much energy they are using. They also send information **directly to suppliers** meaning that the energy companies don't need to send someone out to read the meter
- Smart meters can be confused with Home Energy Monitors that monitor the energy used by specific devices. A key difference is that <u>smart meters are not</u> <u>attached</u> to individual devices e.g. kettle, fridge, TV and they transmit data to the energy supplier
- If you have a SM in your home you will have a meter AND an in-home display unit showing how much you are spending on energy



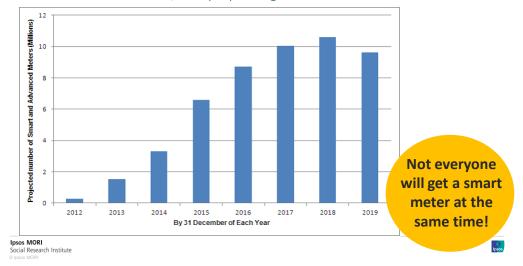
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Smart Meters: timescale for roll-out

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The Government's aim is that every home in Great Britain will have a smart meter by 2019. Each energy supplier has their own plan regarding when their customers will receive a meter. As it stands, most people will get one between 2014 and 2019



ACHIEVED SAMPLE BREAKDOWN FOR PANELLISTS

Gender	Achieved
Male	56
Female	53
Total	109
Age	
18-24	14
25-44	39
45-64	42
65+	14
Total	109
Ethnicity	
White British	84
White Other	4
Black or Minority Ethnic	21
Total	109
SEG	
АВ	21
C1	39
C2	27
DE	22
Total	109
Rural vs. Urban	
Urban	79
Rural	30
Total	109
Electricity Only	
Electricity Only	19
Electricity and gas	90
Total	109
Tenure	
Owner Occupied	55
Social Rented	26
Private Rented	28
Total	109
Fuel Poverty	
Yes	26
No	83

Total	109
Employment status	
Employed	72
Unemployed	8
Student	10
Retired	13
Other	6
Total	109
Long-term condition or disability	
Yes	25
No	84
Total	109
Payment type	
Prepayment	33
Quarterly payment on receipt of bill (standard credit)	25
Direct debit	51
Total	109
Family status	
Married / cohabitating with dependent children	27
Married / cohabitating with no dependent children	27
Lone parent with dependent children	10
Living alone	33
Unrelated adults	12
Total	109

As noted in the main report, we also spoke with 12 ADM customers and 10 recent switchers.