

Retail Market Review Baseline Survey.

Technical Report

July 2014

80 **TNS BMRB**
80 years
of listening
to Britain



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1. Survey design

1.1. The TNS Face to Face Omnibus Survey

Fieldwork for the survey was conducted between 13th March and 5th April 2014 on the face to face TNS Omnibus survey using Computer Assisted Personal Interviewing (CAPI). A total of 6,151 eligible electricity and/or gas consumers took part in the survey, of this 5,531 had both electricity and gas, 599 had electricity but not gas and 21 had gas, but not electricity. This meant that in total there were 6,130 electricity consumers, and 5,552 gas consumers in the survey.

The TNS Omnibus employs a random location methodology to achieve in home interviews with 4,000 adults aged 16 or over, each week. To create the sample frame we split the country into different sample points. To define sampling points, we used 2011 Census small area statistics and the Postcode Address File (PAF). These points are areas of similar population sizes formed by the combination of electoral wards with the constraint that each point must be contained within a single Government Office Region (GOR). In addition, geographic systems were employed to minimise the amount of time taken to cover each area, making it as efficient as possible.

TNS defined 600 points south of the Caledonian Canal in Great Britain (GB) and five to the north of the Canal. These latter points differ in size from the other points and each other to meet the need to separately cover the different parts of the Highlands and Islands.

1.1.1. Stratification and Sample Point Selection

Each wave of the Omnibus selects 333 of these points south of the Caledonian Canal for use (after stratification by Government Office Region and Social Grade). They were also checked to ensure representativeness by an urban and rural classification. These points are then split into two equal batches: one batch is issued in the first week; the other used in the next week. One of the points north of the Caledonian Canal is also used. The statistical accuracy of the GB sampling is maximised by issuing sequential waves of fieldwork systematically across the sampling frame to provide maximum geographical dispersion. This ensures that the sample point selection remains representative for any specific fieldwork wave.

1.1.2. Selection of Clusters within Sampling Points

All of the sample points in the sampling frame are divided into two geographically distinct segments, with each containing, as far as possible, equal populations. For the Omnibuses, alternative A and B halves are worked for each wave of fieldwork. Each week, different electoral wards are selected in each required half, and with Census Output (OAs) Areas being selected within those wards. Groups of OAs containing a minimum of 130 addresses are sampled in those areas from the PAF (a maximum of 200 addresses are issued per interviewer assignment).

1.1.3. Interviewing

The addresses are issued to achieve a sample of 13, 14, 16 or 18 interviews in areas outside of London and 12, 14 or 15 within London, depending upon the questionnaire length. Individuals have to be at least 16 years of age to be eligible to participate in the Omnibus. Each interviewer's Omnibus assignment is conducted over two days of fieldwork and carried out weekday 2pm-8pm and at the weekend. Quotas are set by gender/working status. Within the female quota, a presence of children and a work status is set. For the male quota, a work status is set, to ensure a balanced sample of male adults within effective contacted addresses. All interviewers must leave six doors between each successful interview.

1.1.4. Survey Eligibility

All respondents who participated in the TNS Omnibus during the Ofgem fieldwork period were asked screening questions to assess their eligibility for the Ofgem RMR Baseline survey. In addition to being 16 years or older, for a respondent to be eligible they had to:

- have mains gas and/or mains electricity in their household;
- be responsible, or jointly responsible, for the gas and/or electricity bills in their household.

This screening process therefore excluded respondents who were:

- living in a property where the landlord organised and paid the energy bills;
- living in a household where another household member or members take responsibility for the bills;
- were dependent on a non-household member to manage bills on their behalf.

Of all the adults taking part in the Omnibus survey, 71% met the eligibility criteria and completed the Ofgem survey.

1.1.5. Weighting

Data was rim weighted to population targets set from the National Readership Survey for region, working status, gender and social grade. Rim weighting is an iterative process of correcting for biases in sub-groups of combined characteristics, such as age, gender and social grade to match to known population targets.

1.2. Questionnaire Design

Questionnaire development for the survey was an iterative process which took place between November 2013 and March 2014. The first stage was a questionnaire development workshop which took place on 4th December 2013. It involved TNS BMRB and key stakeholders from Ofgem who analysed the first questionnaire draft. Following this and subsequent revisions to the draft questionnaire, ten cognitive interviews of the questionnaire were conducted by the TNS BMRB research team in London on 13th December 2013.

A pilot survey took place on the face-to-face TNS Omnibus between 3rd and 10th February 2014, with 303 interviews conducted with eligible respondents. The pilot provided an estimate of the overall questionnaire length, as well as an indication of questions likely to face high levels of non-response. The TNS Marketing Sciences team conducted factor analysis and correlation coefficient analysis in order to understand groups of questions where responses were extremely similar to each other and suggest where reduction of questions could take place. Following consultation between Ofgem and TNS BMRB, further revisions were made to the questionnaire after the pilot and before the main stage of interviewing to improve the clarity of questioning and change the filters defining eligibility for certain questions at Ofgem's request.

1.3. Reporting Conventions

Most questions asked consumers separately about their gas and electricity tariffs (if they had both). This allowed more detailed analysis and tracking of attitudes and trends by type of tariff and fuel type. It's worth noting that nearly all consumers gave the same response to the question where they had both fuels. We agreed with Ofgem that for brevity in the report, we would combine the results using either an average or the most positive response given by the consumer as appropriate. In the report it is highlighted where we have taken this action throughout the text. show aggregated findings across both fuel types. For the average results, we have created composite variables by taking the responses from

both the gas version (if applicable) and the electricity version of the question and created an average response for each question.

Active consumers - Some questions were only applicable if a consumer had engaged in the energy market in the last 12 months. We defined this as having switched supplier, changed tariff with your existing supplier or conducted any comparison activity.

2. Impact of the CMA Announcement on fieldwork

On March 27th, during the fieldwork period, Ofgem announced its proposal to make a markets investigation reference to the Competition and Markets Authority (CMA). We looked carefully at variables that may have been affected by this news to study any impact on consumer attitudes by splitting the sample into before and after sub groups. In general, we found no statistically significant changes.

We found no impact on the difference in levels of trust, ease of comparing suppliers and likelihood of switching in the future.

2.1. Awareness of energy suppliers and the energy market

To monitor the impact of the media on attitudes, we asked what consumers had heard about energy suppliers and the energy market in the last 12 months. The only statistically significant change was an increase in mentions of price fixing/cartels.

Q58 What have you heard about energy suppliers and the energy market in the last 12 months?	Pre March 27th	Post March 27th
<i>Percentage</i>		
Price increases	61	58
Energy suppliers over-charging/ profit margins	13	13
Labour party plans to freeze energy prices	7	9
Energy on the political agenda	7	8
Price reductions	4	3
Introduction of Standards of Conduct	3	3
Price fixing/ cartels	1	3
Unweighted base	5,047	1,104

Table only includes responses that could be linked to the CMA referral

Base: All who have mains gas and/or mains electricity at home and are responsible for it

2.2. Attitudes towards energy suppliers

There were differences in some of the attitudinal statements after the announcement. The proportion of billpayers who disagreed that there were no real differences between suppliers' prices decreased, and there was an increase in agreement that **some energy suppliers** are more trustworthy than others. This difference was almost wholly amongst those who tended to agree with the statement, rather than agreed strongly.

Q121_02 There are no real differences between suppliers in the prices they charge	Pre March 27th	Post March 27th
Percentage		
TOTAL Agree	44	47
TOTAL Disagree	27	22
Unweighted base	5,047	1,104

Base: All who have mains gas and/or mains electricity at home and are responsible for it

Q121_06 Some energy suppliers are more trustworthy than others	Pre March 27th	27th March or later
Percentage		
TOTAL Agree	32	38
TOTAL Disagree	24	22
Unweighted base	5,047	1,104

Base: All who have mains gas and/or mains electricity at home and are responsible for it

2.3. Trust in energy suppliers

Overall there was very little difference in the results for the trust measures.

Q60/64/68_01 Trust in own supplier to treat you fairly in their dealings with you	Pre March 27 th	27th March or later
Percentage		
TOTAL Trust	63	64
TOTAL Distrust	15	16
Unweighted base	5,047	1,104

Base: All who have mains gas and/or mains electricity at home and are responsible for it

Q60/64/68_02 Trust in own supplier to provide clear and helpful information	Pre March 27th	27th March or later
Percentage		
TOTAL Trust	53	53
TOTAL Distrust	24	25
Unweighted base	5,047	1,104

Base: All who have mains gas and/or mains electricity at home and are responsible for it

Q60/62/64_03 Trust in own supplier to charge you a fair price	Pre March 27th	27th March or later
Percentage		
TOTAL Trust	66	64
TOTAL Distrust	15	17
Unweighted base	5,047	1,104

Base: All who have mains gas and/or mains electricity at home and are responsible for it

2.4. Perceived ease of comparing tariffs

Q145 How easy or difficult do you believe it is to compare different tariffs for electricity or gas?	Pre March 27th	27th March or later
Percentage		
TOTAL Easy	38	36
TOTAL Difficult	38	39
<i>Unweighted base</i>	5,047	1,104

Base: All who have mains gas and/or mains electricity at home and are responsible for it

2.5. Likelihood of changing supplier in next 12 months/5 years

There was no difference in the likelihood of changing supplier in the next 12 months or next 5 years.

Respondents were just as likely (or unlikely) to consider changing their supplier post the announcement.

Q126_01 Likelihood of changing supplier in next 12 months	Pre March 27th	27th March or later
Percentage		
Definitely	4	4
Very likely	8	8
Fairly likely	14	14
Not very likely	32	31
Not at all likely	19	18
Definitely not	16	16
Don't Know	8	9
<i>Unweighted base</i>	5,047	1,104

Base: All who have mains gas and/or mains electricity at home and are responsible for it

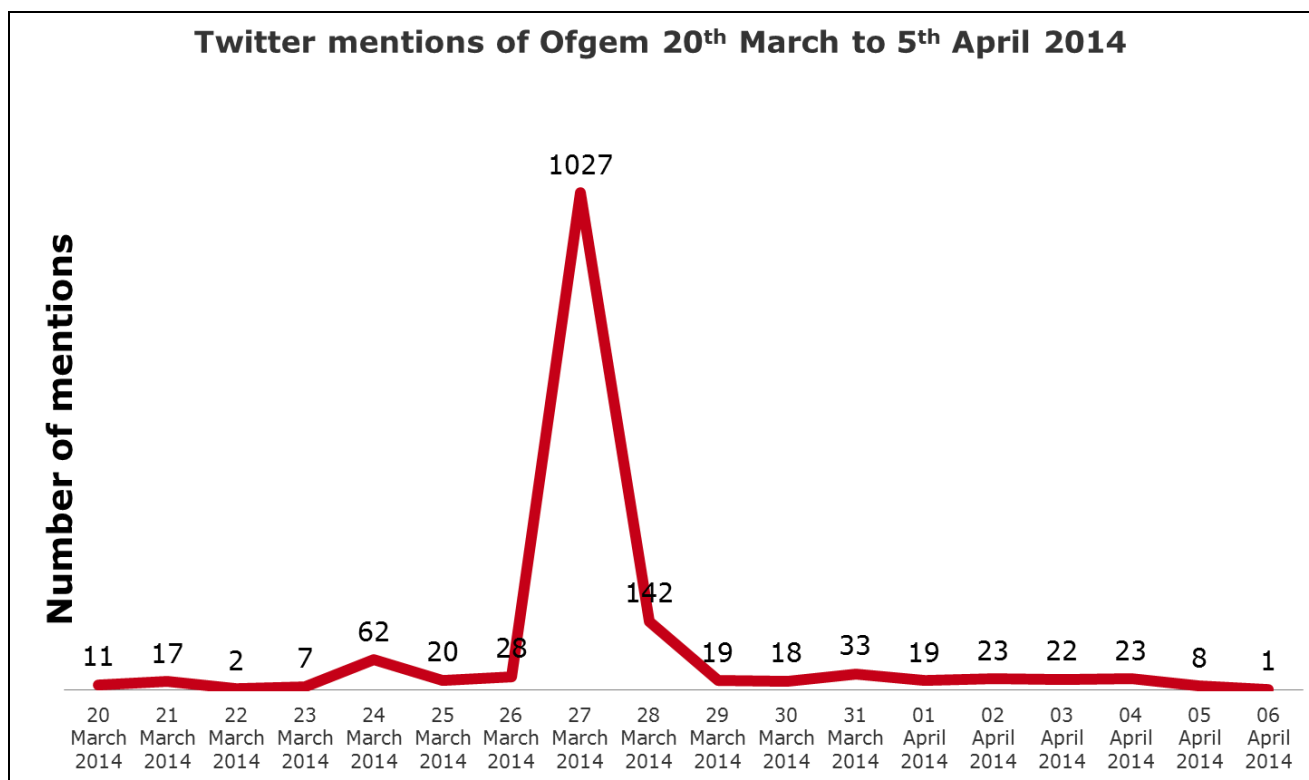
Q126_02 Likelihood of changing supplier in next 5 years	Pre March 27th	27th March or later
Percentage		
Definitely	7	7
Very likely	13	13
Fairly likely	21	21
Not very likely	19	22
Not at all likely	12	12
Definitely not	10	8
Don't Know	17	17
<i>Unweighted base</i>	5,047	1,104

Base: All who have mains gas and/or mains electricity at home and are responsible for it

2.6. Social media analysis

Social media analysis was conducted in order to explore the impact of the referral announcement. We extracted Twitter **conversations addressed to or including the term 'Ofgem'** from **20th March to 5th April 2014** with the main focus on understanding the impact of Ofgem's referral. The impact of the announcement on social media was short lived as the chart below shows. It peaked on the 27th March, the day of the announcement.

Figure 4.1 Twitter mentions of Ofgem 20th March to 5th April 2014



3. Comparison to Consumer Engagement Tracking Survey 2014

Ipsos MORI has continued to run its Consumer Engagement Tracking Survey¹ for Ofgem, in parallel to this RMR Baseline survey. This chapter presents comparable results on key indicators from the RMR Baseline and 2014 Tracking Survey highlighting differences in question wording.

3.1 Switching behaviour

Table 3.1 Number of times switched gas supplier

	TNS BMRB	Ipsos MORI
	Q. 21 How many times have you ever switched your gas supplier?	OG. 14 How many times have you ever switched your gas supplier?
<i>Percentage</i>		
Once	46	37
Twice	23	26
Three times	17	18
Four times or more	14	20
<i>Unweighted base</i>	3088	496
	Base: All who have switched gas supplier this year or ever	Base: All who have ever switched gas supplier

¹ <https://www.ofgem.gov.uk/ofgem-publications/88375/customerengagementwiththeenergymarket-trackingsurvey2014finalpublished2662014.pdf>.

Table 3.2 Number of times switched electricity supplier

	TNS BMRB	Ipsos MORI
	Q. 22 How many times have you ever switched your electricity supplier?	OG. 18 How many times have you ever switched your electricity supplier?
<i>Percentage</i>		
Once	47	35
Twice	24	26
Three times	15	18
Four times or more	14	22
<i>Unweighted base</i>	3088	496
	Base: All who have switched gas supplier this year or ever	Base: All who have ever switched gas supplier

Table 3.3 Recently switched gas supplier

	TNS BMRB	Ipsos MORI
	Q. 19 In the last 12 months, have you switched gas supplier?	OG12a Did you switch your gas supplier in 2013?
<i>Percentage</i>		
Yes	14	13
No*	86	87
<i>Unweighted base</i>	5552	1227
	Base: All who have mains gas at home and are responsible for it	Base: All with mains gas and responsible for bill

* In the Ipsos MORI tracker results, answer codes 'No' and 'Don't know' have been combined.

Table 3.4 Recently switched electricity supplier

	TNS BMRB	Ipsos MORI
	Q.18 In the last 12 months, have you switched your electricity supplier?	OG16a Did you switch your electricity supplier in 2013?
<i>Percentage</i>		
Yes	14	13
No*	86	87
<i>Unweighted base</i>	6130	1383
	Base: All who have mains electricity at home and are responsible for it	Base: All with mains electricity and responsible for bill

* In the Ipsos MORI tracker results, answer codes 'No' and 'Don't know' have been combined.

Table 3.5 Whether those who had not switched supplier in last 12 months had switched supplier before this

	TNS BMRB	Ipsos MORI	Ipsos MORI
	Q. 20 Have you ever switched your gas or electricity supplier?	OG. 13 Did you switch your gas supplier at any time before 2013?	OG. 17 Did you switch your electricity supplier at any time before 2013?
<i>Percentage</i>			
Yes - gas supplier	1	30	N/A
Yes - electricity supplier	7	N/A	27
Yes - both	45	N/A	N/A
No	46	70*	73*
<i>Unweighted base:</i>	5392	1043	1171
	Base: All who have not switched gas or electricity supplier in last 12 months	Base: All who did not switch gas supplier during 2013/2014	Base: All who did not switch electricity supplier in 2013/14

* Note: In the Ipsos MORI tracker result, the 'No' and 'Don't know' answer codes have been combined.

NOTE: We believe the difference in the proportion of consumers who effectively say they have 'never' switched supplier may be due to the different question wording applied in the two surveys. Ofgem's previous analysis of market data on supplier switching is more in line with the figures from the TNS BMRB survey than those from the Ipsos MORI consumer engagement tracking survey.

Table 3.6 The minimum amount to save to encourage switching energy supplier

	TNS BMRB	Ipsos MORI
	Q. 17 What would be the minimum amount of money you would have to save to encourage you to switch your gas or electricity supplier?	OG. 36 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?
Percentage		
Not about saving money	N/A	16
£0 to £50	5	12
£51 to £100	8	17
£101 to £200	19	12
£201 to £400*	23	9
£401 or more	12	
Don't know	32	32
£		
Mean (£)	286	158
Median (£)	240	99
<i>Unweighted base:</i>	6151	819
	Base: All who have mains gas and/or mains electricity at home and are responsible for it	Base: All who have never switched either gas or electricity

NOTE: This question was asked of all consumers in the TNS BMRB survey but only those who had never switched supplier in the Ipsos MORI tracker. The results are therefore not comparable.

3.2 Trust indicators

Table 3.7 Trust in energy suppliers in general

NOTE: the wording differences between the Ipsos MORI tracker and the TNS BMRB questionnaire are significantly different

	Ipsos MORI	TNS BMRB
	OG. 52 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 customers?	Q. 72_1 And please tell me the extent to which you trust or distrust the following to be fair in the way they deal with customers or citizens? Energy suppliers in general
<i>Percentage</i>		
Trust completely	4	5
Tend to trust	24	38
Neither trust nor distrust	27	26
Tend to distrust	29	22
Distrust completely	15	8
<i>Unweighted count:</i>	1393	6151
	Base: All with mains electricity or gas and responsible for bills	Base: All with mains electricity or gas and responsible for bills

4. The Questionnaire

Following the pilot stage, a considerable number of questions were added to the survey. Others were re-worded and re-positioned. To accommodate these without significant change to the routing programming which uses the Question number as the variable name, these questions have been given new question numbers that appear to be out of order with their surrounding questions.

Answers will be inverted randomly

Question 99

Question only asked, if [RAN 1]

3748L1

Dummy to add new column positions added in Fri 05 2014

Question 7000

[Filter =All Adults aged 16+ in GB]

I would now like to ask you some questions about gas and electricity suppliers on behalf of Ofgem, the independent energy regulator for Great Britain.

Question 10

[Filter =All Adults aged 16+ in GB]

1120L2

SHOW SCREEN

Q.1 Do you have mains gas and/or mains electricity in your home?

- 1 ☐ Mains gas only
- 2 ☐ Mains electricity only
- 3 ☐ Mains gas and electricity
- 4 ☐ Neither
- 98 ☐ Refused
- 99 ☐ Don't know

If [Q10 , 4 , 98 , 99] go to end of questionnaire

Question 20

[Filter = All who have mains gas and/or mains electricity at home]

1140L2

Q.2 Are you responsible or jointly responsible for the gas and/or electricity bills in your household?

For those who rent properties where the landlord organises and pays the energy bills, code as 'No'

- 1 ☐ Yes
- 2 ☐ No
- 98 ☐ Refused
- 99 ☐ Don't know

If [Q20 , 2 , 98 , 99] go to end of questionnaire

Question 30

Open ended answer is written as a bitmap

[Filter = All who have mains gas at home and are responsible for it]

1160L2

SHOW SCREEN

Q.3 Who is your current gas supplier?

- 1 ☐ British Gas
- 2 ☐ Co-operative Energy
- 3 ☐ E.ON
- 4 ☐ Ebico
- 5 ☐ Ecotricity
- 6 ☐ EDF
- 7 ☐ First Utility
- 8 ☐ Good Energy
- 9 ☐ Marks & Spencer Energy
- 10 ☐ Npower
- 11 ☐ Ovo
- 12 ☐ Sainsburys Energy
- 13 ☐ Scottish Hydro
- 14 ☐ Scottish Power
- 15 ☐ Southern Electric
- 16 ☐ Spark Energy
- 17 ☐ SSE (Scottish and Southern Energy)
- 18 ☐ Swalec
- 19 ☐ Utility Warehouse
- 20 ☐ Other, namely...
- 98 ☐ Refused
- 99 ☐ Don't know

Question 40

Open ended answer is written as a bitmap

[Filter = All who have mains electricity at home and are responsible for it]

1180L2

SHOW SCREEN

Q.4 Who is your current electricity supplier?

- 1 ☐ British Gas
- 2 ☐ Co-operative Energy
- 3 ☐ E.ON
- 4 ☐ Ebico
- 5 ☐ Ecotricity
- 6 ☐ EDF
- 7 ☐ First Utility
- 8 ☐ Good Energy
- 9 ☐ Marks & Spencer Energy
- 10 ☐ Npower
- 11 ☐ Ovo
- 12 ☐ Sainsburys Energy
- 13 ☐ Scottish Hydro
- 14 ☐ Scottish Power
- 15 ☐ Southern Electric
- 16 ☐ Spark Energy
- 17 ☐ SSE (Scottish and Southern Energy)
- 18 ☐ Swalec
- 19 ☐ Utility Warehouse
- 20 ☐ Other, namely...
- 98 ☐ Refused
- 99 ☐ Don't know

Question 50

Open ended answer is written as a bitmap

[Filter = All who have mains gas at home and are responsible for it]

1182L2

SHOW SCREEN

Q.5 How do you pay for your gas?

- 1 ☐ Monthly direct debit
- 2 ☐ Quarterly direct debit
- 3 ☐ Pay by cheque, cash or card on receipt of your bill
- 4 ☐ Prepayment meter (where you top up credit onto a key or card)
- 5 ☐ Fuel direct (where a set amount is deducted from your benefits before you receive them)
- 6 ☐ Weekly \ fortnightly payment scheme
- 7 ☐ Payment card \ book where you can pay money in whenever you choose (ad hoc)
- 8 ☐ Other, namely...
- 98 ☐ Refused
- 99 ☐ Don't know

Question 60

Open ended answer is written as a bitmap

[Filter = All who have mains electricity at home and are responsible for it]

1184L2

SHOW SCREEN

Q.6 How do you pay for your electricity?

Interviewer: Check even if on dual fuel deal.

- 1 ☐ Monthly direct debit
- 2 ☐ Quarterly direct debit
- 3 ☐ Pay by cheque, cash or card on receipt of your bill
- 4 ☐ Prepayment meter (where you top up credit onto a key or card)
- 5 ☐ Fuel direct (where a set amount is deducted from your benefits before you receive them)
- 6 ☐ Weekly \ fortnightly payment scheme
- 7 ☐ Payment card \ book where you can pay money in whenever you choose (ad hoc)
- 8 ☐ Other, namely...
- 98 ☐ Refused
- 99 ☐ Don't know

Question 70

[Filter = All who have mains gas and mains electricity at home and are responsible for it, and have the same supplier]

1186L1

SHOW SCREEN

Q.7 Do you receive a dual fuel discount for buying your gas and electricity from the same energy supplier?

- 1 ☐ Yes
- 2 ☐ No
- 8 ☐ Refused
- 9 ☐ Don't know

Question 80

Minimum 1

Maximum 3000

User defined button : 3001 "Don't Know"

User defined button : 3002 "Refuse"

[Filter = All who have mains gas and/or mains electricity at home and are responsible for it] 1187L4

SHOW SCREEN

Q.8 Approximately how much do you spend on home energy? That is electricity and mains gas if you have it.

You can answer per year, per month or per week, but this should be on average for the whole year, including the winter.

Interviewer: Enter their best estimate and enter time period at next question.

Question 90

[Filter = All who spend something on home energy (Q8>0)]

1191L1

Q.9 Interviewer code, was that ...

- 1 ☐ Weekly
- 2 ☐ Fortnightly
- 3 ☐ Every four weeks
- 4 ☐ A calendar month
- 5 ☐ Quarterly
- 6 ☐ Twice yearly
- 7 ☐ Annual

Question 7010

Question only asked, if [RAN 1]
1192L1

- 1 ☐ gas
- 2 ☐ electricity
- 3 ☐ gas and electricity

Question 7009

Multiple answers allowed
Question only asked, if [RAN 1]
1193L10

- 1 ☐ gas
- 2 ☐ electricity
- 3 ☐ gas and electricity

Question 100

Answer categories mentioned in question 7009 will be displayed

[Filter = All who have mains gas and/or mains electricity at home and are responsible for it] 1203L1

SHOW SCREEN

Q.10 An energy tariff is the pricing plan for <?> that you use.

Are you on an online tariff, that is, a <?> account that you manage over the internet?

- 1 ☐ Yes, gas only
- 2 ☐ Yes, electricity only
- 3 ☐ Yes, gas and electricity
- 4 ☐ No
- 8 ☐ Refused
- 9 ☐ Don't know

Question 110

Answer categories mentioned in question 7009 will be displayed

[Filter = All who have mains gas and/or mains electricity at home and are responsible for it] 1204L2

SHOW SCREEN

Q.11 A fixed term tariff is a tariff that has a definite end date.

Are you on a fixed term tariff for <?> ?

- 1 ☐ Yes, gas only
- 2 ☐ Yes, electricity only
- 3 ☐ Yes, gas and electricity
- 4 ☐ No
- 98 ☐ Refused
- 99 ☐ Don't know

Question 130

Open ended answer is written as a bitmap

[Filter = All who have mains electricity at home and are responsible for it]

1206L1

SHOW SCREEN

Q.13 Do you have an electricity meter that charges different amounts at different times of the day?

- 1 ☐ Yes, such as Economy 7 or Economy 10
- 2 ☐ No, it's a single rate meter
- 3 ☐ Other, namely...
- 8 ☐ Refused
- 9 ☐ Don't know

Question 7001

[Filter = All who have mains gas and/or mains electricity at home and are responsible for it]

I would now like to ask you some more questions about energy tariffs.

Question 140

Multiple answers allowed

[Filter = All who have mains gas and/or mains electricity at home and are responsible for it] 1225L100

SHOW SCREEN MULTI-CHOICE

Q.14 Which of the following do you think it is possible for energy customers to do:

- 1 ☐ Change their payment method with their current supplier
- 2 ☐ Change their tariff with their current supplier
- 3 ☐ Switch to a different supplier
- 4 ☐ All of the above
- 5 ☐ None of the above
- 98 ☐ Refused
- 99 ☐ Don't know

Question 860

[Filter = All who have mains gas and/or mains electricity at home and are responsible for it] 1343L1

SHOW SCREEN

Q.86 How familiar would you say you are with the range of different energy tariffs available to you from energy suppliers in general?

- 1 ☐ Completely
- 2 ☐ Fairly
- 3 ☐ Not very
- 4 ☐ Not at all
- 8 ☐ Refused
- 9 ☐ Don't know

Question 870

[Filter = All who have mains gas at home and are responsible for it] 1344L1

SHOW SCREEN

Q.87 How familiar would you say you are with the range of different tariffs available to you from your current gas supplier?

- 1 ☐ Completely
- 2 ☐ Fairly
- 3 ☐ Not very
- 4 ☐ Not at all
- 8 ☐ Refused
- 9 ☐ Don't know

Question 880

[Filter = All who have mains electricity at home and are responsible for it] 1345L1

SHOW SCREEN

Q.88 How familiar would you say you are with the range of different tariffs available to you from your current electricity supplier?

- 1 ☐ Completely
- 2 ☐ Fairly
- 3 ☐ Not very
- 4 ☐ Not at all
- 8 ☐ Refused
- 9 ☐ Don't know

Question 890

[Filter = All who have mains gas at home and are responsible for it] 1346L1

SHOW SCREEN

Q.89 How familiar would you say you are with the features of your current gas tariff?

I mean the rate you pay and any discounts, any standing charges that apply, exit fees or benefits that you receive.

- 1 ☐ Completely
- 2 ☐ Fairly
- 3 ☐ Not very
- 4 ☐ Not at all
- 8 ☐ Refused
- 9 ☐ Don't know

Question 900

[Filter = All who have mains electricity at home and are responsible for it] 1347L1

SHOW SCREEN

Q.90 How familiar would you say you are with the features of your current electricity tariff?

I mean the rate you pay and any discounts, any standing charges that apply, exit fees or benefits that you receive.

- 1 ☐ Completely
- 2 ☐ Fairly
- 3 ☐ Not very
- 4 ☐ Not at all
- 8 ☐ Refused
- 9 ☐ Don't know

Question 170

Maximum 3000

User defined button : 3001 "Don't Know, It's not about saving money"

User defined button : 3002 "Refuse"

[Filter = All who have mains gas and/or mains electricity at home and are responsible for it] 1366L4

SHOW SCREEN

Q.17 What would be the minimum amount of money you would have to save to encourage you to switch your gas or electricity supplier? Just approximately.

You can answer per year, per month or per week.

Question 1370

[Filter = All who would have to save money to switch gas or electricity supplier (Q17>0)] 1388L1

Q.137 Interviewer code, was that ...

- 1 ☐ Weekly
- 2 ☐ Fortnightly
- 3 ☐ Every four weeks
- 4 ☐ A calendar month
- 5 ☐ Quarterly
- 6 ☐ Twice yearly
- 7 ☐ Annual

Question 190

[Filter = All who have mains gas at home and are responsible for it] 1389L1

SHOW SCREEN

Q.19 In the last 12 months, have you switched your gas supplier?

- 1 ☐ Yes
- 2 ☐ No
- 8 ☐ Refused
- 9 ☐ Don't know

Question 180

[Filter = All who have mains electricity at home and are responsible for it] 1390L1

SHOW SCREEN

Q.18 In the last 12 months, have you switched your electricity supplier?

- 1 ☐ Yes
- 2 ☐ No
- 8 ☐ Refused
- 9 ☐ Don't know

Question 200

[Filter = All who have not switched gas or electricity supplier in last 12 months]

1391L1

SHOW SCREEN

Q.20 Have you ever switched your gas or electricity supplier?

- 1 ☐ Yes - gas supplier
- 2 ☐ Yes - electricity supplier
- 3 ☐ Yes - both
- 4 ☐ No
- 8 ☐ Refused
- 9 ☐ Don't know

Question 210

[Filter = All who have switched gas supplier this year or ever]

1392L1

SHOW SCREEN

Q.21 How many times have you ever switched your gas supplier?

- 1 ☐ Once
- 2 ☐ Twice
- 3 ☐ Three times
- 4 ☐ Four times or more
- 8 ☐ Refused
- 9 ☐ Don't know

Question 1380

[Filter = All who have switched gas supplier more than 12 months ago]

1393L1

SHOW SCREEN

Q.138 When did you last do this?

- 1 ☐ Between 1 and 2 years ago
- 2 ☐ Between 2 and 5 years ago
- 3 ☐ Between 5 and 9 years ago
- 4 ☐ 10 or more years ago
- 8 ☐ Refused
- 9 ☐ Don't know

Question 220

[Filter = All who have switched electricity supplier in the last 12 months or ever]

1394L1

SHOW SCREEN

Q.22 How many times have you ever switched your electricity supplier?

- 1 ☐ Once
- 2 ☐ Twice
- 3 ☐ Three times
- 4 ☐ Four times or more
- 8 ☐ Refused
- 9 ☐ Don't know

Question 1390

[Filter = All who have switched electricity supplier more than 12 months ago]

1395L1

SHOW SCREEN

Q.139 When did you last do this?

- 1 ☐ Between 1 and 2 years ago
- 2 ☐ Between 2 and 5 years ago
- 3 ☐ Between 5 and 9 years ago
- 4 ☐ 10 or more years ago
- 8 ☐ Refused
- 9 ☐ Don't know

Question 7290

[Filter [12] = 1]

DO NOT SHOW SCREEN UNTIL TOLD TO DO SO

Question 290

Open ended answer is written as a bitmap

[Filter = All who have ever switched gas supplier]

1396L2

DO NOT PROMPT

Q.29 Thinking of the last time you switched gas supplier, how did you switch?

Interviewer code from respondent's answer

- 1 ☐ On-line price comparison service
- 2 ☐ Telephone price comparison service
- 3 ☐ I contacted the supplier by phone
- 4 ☐ Through the supplier's website
- 5 ☐ Through a salesperson who knocked at my door
- 6 ☐ Through a salesperson in the street \ shopping centre \ other public place
- 7 ☐ Through a collective (group) switching campaign organised by a third party (e.g. council \ charity \ housing association \ Big Switch \ Ready to Switch etc)
- 8 ☐ Supplier contacted me by phone
- 9 ☐ Other, namely...
- 98 ☐ Refused
- 99 ☐ Don't know

Question 7340

[Filter [13] = 1]

DO NOT SHOW SCREEN UNTIL TOLD TO DO SO

Question 340

Open ended answer is written as a bitmap

[Filter = All who have ever switched electricity supplier]

1398L2

DO NOT PROMPT

Q.34 Thinking of the last time you switched electricity supplier, how did you switch?

Interviewer code from respondent's answer

- 1 ☐ On-line price comparison service
- 2 ☐ Telephone price comparison service
- 3 ☐ I contacted the supplier by phone
- 4 ☐ Through the supplier's website
- 5 ☐ Through a salesperson who knocked at my door
- 6 ☐ Through a salesperson in the street \ shopping centre \ other public place
- 7 ☐ Written communication
- 8 ☐ Through a collective (group) switching campaign organised by a third party (e.g. council \ charity \ housing association \ Big Switch \ Ready to Switch etc)
- 10 ☐ Supplier contacted me by phone
- 9 ☐ Other, namely...
- 98 ☐ Refused
- 99 ☐ Don't know

Question 230

[Filter = All who have ever switched gas supplier]

SHOW SCREEN

SHOW SCREEN

Q.23 Thinking of the last time you switched your gas supplier, how much do you agree or disagree with the following statements:

	Agree strongly	Tend to agree	Neither agree nor disagree	Tend to disagree	Disagree strongly	Refused	Don't know
I found it easy to decide which deal(s) to switch to	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Question 240

[Filter = All who have ever switched electricity supplier]

SHOW SCREEN

SHOW SCREEN

Q.24 Thinking of the last time you switched your electricity supplier, how much do you agree or disagree with the following statements:

	Agree strongly	Tend to agree	Neither agree nor disagree	Tend to disagree	Disagree strongly	Refused	Don't know
I found it easy to decide which deal(s) to switch to	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Start

Question 250

Open ended answer is written as a bitmap

[Filter = All who have switched gas supplier in the last 12 months]

1422L2

SHOW SCREEN

Q.25 And who was your previous gas supplier?

- 1 ☐ British Gas
- 2 ☐ Co-operative Energy
- 3 ☐ E.ON
- 4 ☐ Ebico
- 5 ☐ Ecotricity
- 6 ☐ EDF
- 7 ☐ First Utility
- 8 ☐ Good Energy
- 9 ☐ Marks & Spencer Energy
- 10 ☐ Npower
- 11 ☐ Ovo
- 12 ☐ Sainsburys Energy
- 13 ☐ Scottish Hydro
- 14 ☐ Scottish Power
- 15 ☐ Southern Electric
- 16 ☐ Spark Energy
- 17 ☐ SSE (Scottish and Southern Energy)
- 18 ☐ Swalec
- 19 ☐ Utility Warehouse
- 20 ☐ Other, namely...
- 98 ☐ Refused
- 99 ☐ Don't know

If [Q30 , Q250 and Q30 , 1 TO 19 and Q250 , 1 TO 19] otherwise continue at question 260

You have given the same response for previous gas supplier and present gas supplier Please check again.

Question 260

[Filter = All who have mains gas at home and are responsible for it]

1442L1

SHOW SCREEN

Q.26 In the last 12 months, have you changed the payment method with your gas supplier?

- 1 ☐ Yes
- 2 ☐ No
- 8 ☐ Refused
- 9 ☐ Don't know

Question 270

Open ended answer is written as a bitmap

[Filter = All who switched payment method for gas]

1443L2

SHOW SCREEN

Q.27 How did you previously pay for your gas?

- 1 ☐ Monthly direct debit
- 2 ☐ Quarterly direct debit
- 3 ☐ Pay by cheque, cash or card on receipt of your bill
- 4 ☐ Prepayment meter (where you top up credit onto a key or card)
- 5 ☐ Fuel direct (where a set amount is deducted from your benefits before you receive them)
- 6 ☐ Weekly \ fortnightly payment scheme
- 7 ☐ Payment card \ book where you can pay money in whenever you choose (ad hoc)
- 8 ☐ Other, namely...
- 98 ☐ Refused
- 99 ☐ Don't know

Question 300

Open ended answer is written as a bitmap

[Filter = All who have switched electricity supplier in the last 12 months]

1445L2

SHOW SCREEN

Q.30 And who was your previous electricity supplier?

- 1 ☐ British Gas
- 2 ☐ Co-operative Energy
- 3 ☐ E.ON
- 4 ☐ Ebico
- 5 ☐ Ecotricity
- 6 ☐ EDF
- 7 ☐ First Utility
- 8 ☐ Good Energy
- 9 ☐ Marks & Spencer Energy
- 10 ☐ Npower
- 11 ☐ Ovo
- 12 ☐ Sainsburys Energy
- 13 ☐ Scottish Hydro
- 14 ☐ Scottish Power
- 15 ☐ Southern Electric
- 16 ☐ Spark Energy
- 17 ☐ SSE (Scottish and Southern Energy)
- 18 ☐ Swalec
- 19 ☐ Utility Warehouse
- 20 ☐ Other, namely...
- 98 ☐ Refused
- 99 ☐ Don't know

If [Q40 , Q300 and Q40 , 1 TO 19 and Q300 , 1 TO 19] otherwise continue at question 310

You have given the same response for previous electricity supplier and present electricity supplier Please check again.

Question 310

[Filter = All who have mains electricity at home and are responsible for it]

1447L1

SHOW SCREEN

Q.31 In the last 12 months, have you changed the payment method with your electricity supplier?

- 1 ☐ Yes
- 2 ☐ No
- 8 ☐ Refused
- 9 ☐ Don't know

Question 320

Open ended answer is written as a bitmap

[Filter = All who switched payment method for electricity]

1448L2

SHOW SCREEN

Q.32 How did you previously pay for your electricity?

- 1 ☐ Monthly direct debit
- 2 ☐ Quarterly direct debit
- 3 ☐ Pay by cheque, cash or card on receipt of your bill
- 4 ☐ Prepayment meter (where you top up credit onto a key or card)
- 5 ☐ Fuel direct (where a set amount is deducted from your benefits before you receive them)
- 6 ☐ Weekly \ fortnightly payment scheme
- 7 ☐ Payment card \ book where you can pay money in whenever you choose (ad hoc)
- 8 ☐ Other, namely...
- 98 ☐ Refused
- 99 ☐ Don't know

Question 350

[Filter = All who have mains gas at home and are responsible for it]

1468L1

SHOW SCREEN

Q.35 In the last 12 months, did [you/you also] change the tariff you were on with your existing gas supplier (without switching supplier)?

- 1 ☐ Yes
- 2 ☐ No
- 8 ☐ Refused
- 9 ☐ Don't know

Question 370

[Filter = All who have not changed gas tariff in the past 12 months]

1487L1

SHOW SCREEN

Q.37 Have you ever changed your tariff with an existing gas supplier?

- 1 ☐ Yes
- 2 ☐ No
- 8 ☐ Refused
- 9 ☐ Don't know

Question 410

[Filter = All who have not switched gas supplier in the past 12 months]

1488L1

SHOW SCREEN

Q.41 In the last 12 months, did you compare the gas tariff you were on with those offered by other suppliers?

- 1 ☐ Yes
- 2 ☐ No
- 8 ☐ Refused
- 9 ☐ Don't know

Question 430

[Filter = All who have not changed gas tariff in the past 12 months]

1489L1

SHOW SCREEN

Q.43 In the last 12 months, did you compare the gas tariff you were on with any others available with your existing supplier?

- 1 ☐ Yes
- 2 ☐ No
- 8 ☐ Refused
- 9 ☐ Don't know

Question 360

[Filter = All who have mains electricity at home and are responsible for it]

1490L1

SHOW SCREEN

Q.36 In the last 12 months, did [you/you also] change the tariff you were on with your existing electricity supplier (without switching supplier)?

- 1 ☐ Yes
- 2 ☐ No
- 8 ☐ Refused
- 9 ☐ Don't know

Question 390

[Filter = All who have not changed electricity tariff in the past 12 months]

1491L1

SHOW SCREEN

Q.39 Have you ever changed your tariff with an existing electricity supplier?

- 1 ☐ Yes
- 2 ☐ No
- 8 ☐ Refused
- 9 ☐ Don't know

Question 420

[Filter = All who have not switched electricity supplier in the past 12 months]

1492L1

SHOW SCREEN

Q.42 In the last 12 months, did you compare the electricity tariff you were on with those offered by other suppliers?

- 1 ☐ Yes
- 2 ☐ No
- 8 ☐ Refused
- 9 ☐ Don't know

Question 440

[Filter = All who have not changed electricity tariff in the past 12 months]

1493L1

SHOW SCREEN

Q.44 In the last 12 months, did you compare the electricity tariff you were on with any others available with your existing supplier?

- 1 ☐ Yes
- 2 ☐ No
- 8 ☐ Refused
- 9 ☐ Don't know

Question 1001510

[Filter [24] = 1]

DO NOT SHOW SCREEN UNTIL TOLD TO DO SO

Question 460

Multiple answers allowed - Order recorded:3749L9

Open ended answer is written as a bitmap

Maximum 3

[Filter = All who have switched gas supplier, changed tariff, compared tariff with other suppliers or checked tariff with current supplier in last 12 months]

1512L100

MULTI CHOICE

Q.46 Thinking of the last time you switched or compared gas supplier or tariffs, what were the main things you wanted to achieve?

- 1 ☐ Save money
- 2 ☐ Get better customer service
- 3 ☐ Get other benefits (e.g. loyalty points)
- 4 ☐ Wanted a dual fuel package
- 5 ☐ Wanted a fixed term/fixed price deal
- 6 ☐ Wanted a 'greener' tariff
- 7 ☐ Wanted an online tariff
- 8 ☐ Other, namely...
- 98 ☐ Refused
- 99 ☐ Don't know

Question 450

Multiple answers allowed - Order recorded:3758L9

Open ended answer is written as a bitmap

Maximum 3

[Filter = All who have switched gas supplier, changed tariff, compared tariff with other suppliers or checked tariff with current supplier in last 12 months]

1630L100

MULTI CHOICE

Q.45 And what were the main reasons that caused you to compare?

Interviewer: ask and code up to 3 reasons. DO NOT PROMPT

- 1 ☐ I received a bill or direct debit \ prepayment statement from my supplier
- 2 ☐ I received a price increase notice from my supplier
- 3 ☐ I received an end of fixed term tariff notice from my supplier
- 4 ☐ I received an annual summary or review from my supplier
- 5 ☐ I received a 'dead notice' from my supplier about my tariff
- 6 ☐ I saw a message on a communication from my supplier about how I could make savings by changing tariff or payment method with my current supplier
- 7 ☐ I received another communication from my supplier
- 8 ☐ I experienced poor customer service
- 9 ☐ I moved home
- 10 ☐ I heard my energy supplier's prices were going up
- 11 ☐ Media coverage about energy suppliers in general
- 12 ☐ I was looking at a money saving website
- 13 ☐ I saw an advert on TV
- 14 ☐ I saw an advert (billboard)
- 15 ☐ I saw an advert in the newspaper
- 16 ☐ Advert other
- 17 ☐ Talked to a friend, family member, or neighbour
- 18 ☐ Other, namely...
- 98 ☐ Refused
- 99 ☐ Don't know

Question 470

[Filter = All who have switched gas supplier, changed tariff, compared tariff with other suppliers or checked tariff with current supplier in last 12 months]

1730L1

SHOW SCREEN

Q.47 When you last compared gas tariffs or suppliers did you also look for information about your existing tariff or energy use?

- 1 ☐ Yes, I just found out more about my existing tariff
- 2 ☐ Yes, I just found out more about my existing energy use
- 3 ☐ Yes, I found out more about both my tariff and energy use
- 4 ☐ No, neither
- 8 ☐ Refused
- 9 ☐ Don't know

Question 480

Multiple answers allowed

Answers will be displayed in random order

Open ended answer is written as a bitmap

[Filter = All who looked for information about existing gas tariff or energy use]

1731L100

SHOW SCREEN - MULTI CHOICE

Q.48 And how did you find out more about your existing tariff or energy use?

- 1 ☐ Looked at my bill or direct debit/prepayment statement
- 2 ☐ Looked at my annual summary or review
- 3 ☐ Looked at my account details online
- 4 ☐ Rang my supplier
- 6 ☐ Other, namely...
- 90 ☐
- 98 ☐ Refused
- 99 ☐ Don't know

Question 490

[Filter = All who looked for information about existing gas tariff or energy use]

SHOW SCREEN

SHOW SCREEN

Q.49 And thinking about the information that you wanted about your existing gas tariff or energy use. How easy or difficult was it..

	Very easy	Quite easy	Neither easy nor difficult	Quite difficult	Very difficult	Refused	Don't know
to find the information that you wanted?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
to understand the information that you found?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Question 7004

DO NOT SHOW SCREEN UNTIL TOLD TO DO SO

Question 500

Multiple answers allowed
Statements will be displayed in rotated order
Open ended answer is written as a bitmap

[Filter =All who have switched gas supplier, changed tariff, compared tariff with other suppliers or checked tariff with current supplier in last 12 months]

1833L100

MULTI CHOICE

Q.50 And when you compared and/or switched gas supplier or tariff, how did you find out about the deals offered?

Interviewer: code all that apply. DO NOT PROMPT

- 1 ☐ I used an online\website price comparison service (e.g. USwitch, Money Supermarket)
- 2 ☐ I rang my supplier
- 3 ☐ I rang other suppliers
- 4 ☐ I looked at my supplier's own website
- 5 ☐ I looked at the websites of other suppliers
- 6 ☐ I spoke to a supplier salesperson in the street\shopping centre\ public place
- 7 ☐ A friend or family member told me about it
- 8 ☐ A supplier salesperson knocked at my door
- 9 ☐ A new supplier phoned me
- 10 ☐ I saw an advert
- 11 ☐ I phoned a comparison service
- 12 ☐ Written communication or marketing material from supplier
- 13 ☐ Through a collective (group) switching campaign organised by a third party (e.g. council\charity\housing association \ Big Switch, ready to switch etc)
- 14 ☐ Other, namely...
- 98 ☐ Refused
- 99 ☐ Don't know

Question 510

[Filter = All who have switched gas supplier or tariff in the last 12 months and aim was to save money]

1933L1

SHOW SCREEN

Q.51 To the best of your knowledge, do you feel that you are now paying less than you would have if you had not switched your gas tariff or supplier?

- 1 ☐ Yes, I feel I'm paying less now
- 2 ☐ Yes, I feel I'll be paying less in the long term
- 3 ☐ No
- 8 ☐ Refused
- 9 ☐ Don't know

Question 1001540

[Filter [28] = 1]

DO NOT SHOW SCREEN UNTIL TOLD TO DO SO

Question 530

Multiple answers allowed - Order recorded:3767L9

Open ended answer is written as a bitmap

Maximum 3

[Filter = All who have switched electricity supplier, changed tariff, compared tariff with other suppliers or checked tariff with current supplier in the last 12 months]

1934L100

MULTI CHOICE

Q.53 Thinking of the last time you switched or compared electricity supplier or tariffs, what were the main things you wanted to achieve?

Interviewer code up to 3 responses. DO NOT PROMPT

- 1 ☐ Save money
- 2 ☐ Get better customer service
- 3 ☐ Get other benefits (e.g. loyalty points)
- 4 ☐ Wanted a dual fuel package
- 5 ☐ Wanted a fixed term\fixed price deal
- 6 ☐ Wanted a 'greener' tariff
- 7 ☐ Wanted an online tariff
- 8 ☐ Other, namely...
- 98 ☐ Refused
- 99 ☐ Don't know

Question 520

Multiple answers allowed - Order recorded:3776L9

Open ended answer is written as a bitmap

Maximum 3

[Filter = All who have switched electricity supplier, changed tariff, compared tariff with other suppliers or checked tariff with current supplier in the last 12 months]

2034L100

MULTI CHOICE

Q.52 And what were the main reasons that caused you to compare? Interviewer ask and code up to 3 reasons.

DO NOT PROMPT

- 1 ☐ I received a bill or direct debit \ prepayment statement from my supplier
- 2 ☐ I received a price increase notice from my supplier
- 3 ☐ I received an end of fixed term tariff notice from my supplier
- 4 ☐ I received an annual summary or review from my supplier
- 5 ☐ I received a 'dead notice' from my supplier about my tariff
- 6 ☐ I saw a message on a communication from my supplier about how I could make savings by changing tariff or payment method with my current supplier
- 7 ☐ I received a letter telling me about savings I could achieve by changing tariff, payment method or managing my account online with my current supplier
- 8 ☐ I received another communication from my supplier
- 9 ☐ I experienced poor customer service
- 10 ☐ I moved home
- 11 ☐ Media coverage about my energy supplier's prices going up
- 12 ☐ Media coverage about energy suppliers in general
- 13 ☐ I was looking at a money saving website
- 14 ☐ I saw an advert on TV
- 15 ☐ I saw an advert (billboard)
- 16 ☐ I saw an advert in the newspaper
- 17 ☐ Advert other
- 18 ☐ Talked to a friend, family member, or neighbour
- 19 ☐ Other, namely...
- 98 ☐ Refused
- 99 ☐ Don't know

Question 540

[Filter = All who have switched electricity supplier, changed tariff, compared tariff with other suppliers or checked tariff with current supplier in the last 12 months]

2134L1

SHOW SCREEN

Q.54 When you last compared electricity tariffs or energy suppliers did you look for information about your existing tariff or energy use?

- 1 ☐ Yes, I just found out more about my existing tariff
- 2 ☐ Yes, I just found out more about my existing energy use
- 3 ☐ Yes, I found out more about both my tariff and energy use
- 4 ☐ No, neither
- 8 ☐ Refused
- 9 ☐ Don't know

Question 550

Multiple answers allowed

Answers will be displayed in random order

Open ended answer is written as a bitmap

[Filter = All who looked for information about existing electricity tariff or energy use]

2135L100

SHOW SCREEN-MULTI CHOICE

Q.55 And how did you find out more about your existing tariff or energy use?

- 1 ☐ Looked at my bill or direct debit/prepayment statement
- 2 ☐ Looked at my annual statement
- 3 ☐ Looked at my account details online
- 4 ☐ Rang my supplier
- 6 ☐ Other, namely...
- 98 ☐ Refused
- 99 ☐ Don't know

Question 1400

[Filter = All who looked for information about existing electricity tariff or energy use]

SHOW SCREEN

SHOW SCREEN

Q.140 And thinking about the information that you wanted about your existing electricity tariff or energy use. How easy or difficult was it..

	Very easy	Quite easy	Neither easy nor difficult	Quite difficult	Very difficult	Refused	Don't know
to find the information that you wanted?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
to understand the information that you found?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Question 7560

[Filter [30] = 1]

DO NOT SHOW SCREEN UNTIL TOLD TO DO SO

Question 560

Multiple answers allowed
Statements will be displayed in rotated order
Open ended answer is written as a bitmap

[Filter =All who have switched electricity supplier, changed tariff, compared tariff with other suppliers or checked tariff with current supplier in the last 12 months]

2237L100

MULTI CHOICE

Q.56 And when you compared and/or switched electricity supplier or tariff, how did you find out about the deals offered?

Interviewer: code all that apply. DO NOT PROMPT

- 1 ☐ I used an online\website price comparison service (e.g. USwitch, Money Supermarket)
- 2 ☐ I rang my supplier
- 3 ☐ I rang other suppliers
- 4 ☐ I looked at my supplier's own website
- 5 ☐ I looked at the websites of other suppliers
- 6 ☐ I spoke to a supplier salesperson in the street\shopping centre\ public place
- 7 ☐ A friend or family member told me about it
- 8 ☐ A supplier salesperson knocked at my door
- 9 ☐ A new supplier phoned me
- 10 ☐ I saw an advert
- 11 ☐ I phoned a comparison service
- 12 ☐ Written communication or marketing material from your supplier
- 13 ☐ Through a collective (group) switching campaign organised by a third party (e.g. council\charity\housing association \ Big Switch, ready to switch etc)
- 14 ☐ Other, namely...
- 98 ☐ Refused
- 99 ☐ Don't know

Question 570

[Filter = All who have switched electricity supplier or tariff in the last 12 months and aim was to save money]

2337L1

SHOW SCREEN

Q.57 To the best of your knowledge, do you feel that you are now paying less than you would have if you had not switched your electricity tariff or supplier?

- 1 ☐ Yes, I feel I'm paying less now
- 2 ☐ Yes, I feel I'll be paying less in the long term
- 3 ☐ No
- 8 ☐ Refused
- 9 ☐ Don't know

Question 7005

[Filter = All who have mains gas and/or mains electricity at home and are responsible for it]

DO NOT SHOW SCREEN UNTIL TOLD TO DO SO

Question 7006

[Filter [2] = 1]

I would now like to ask you some questions about your attitudes to your own and other energy suppliers.

Question 580

Multiple answers allowed

Open ended answer is written as a bitmap

[Filter = All who have mains gas and/or mains electricity at home and are responsible for it]

2356L100

MULTI CHOICE

Q.58 What have you heard about energy suppliers and the energy market in the last 12 months?

PROBE DO NOT PROMPT

- 1 ☐ Price increases
- 2 ☐ Introduction of Standards of Conduct - treat customers fairly or communicate more clearly
- 3 ☐ Other mentions of clearer information for energy consumers
- 4 ☐ Poor customer service
- 5 ☐ Simpler structures for tariffs
- 6 ☐ Removal of some discounts
- 7 ☐ There is more competition
- 8 ☐ Plans to freeze energy prices
- 9 ☐ Energy on the government \ political agenda
- 10 ☐ Power cut issues
- 11 ☐ Green \ environmental issues
- 14 ☐ Energy suppliers over charging\profit margins
- 15 ☐ Fewer energy tariffs
- 16 ☐ Price reductions
- 17 ☐ Ofgem's Be an Energy Shopper\Go Energy Shopping campaign\website
- 12 ☐ Nothing
- 13 ☐ Other, namely...
- 98 ☐ Refused
- 99 ☐ Don't know

Question 590

[Filter = All who have gas only, or if gas and electricity, gas supplier is not the same as electricity supplier]

2474L1

SHOW SCREEN

Q.59 How satisfied or dissatisfied are you with the overall service you receive from your current gas supplier?

- 1 ☐ Very satisfied
- 2 ☐ Satisfied
- 3 ☐ Neither satisfied nor dissatisfied
- 4 ☐ Dissatisfied
- 5 ☐ Very dissatisfied
- 8 ☐ Refused
- 9 ☐ Don't know

Question 6601

[Filter = All who have gas only, or if gas and electricity, gas supplier is not the same as electricity supplier]
SHOW SCREEN AND READ OUT STATEMENT

SHOW SCREEN AND READ OUT STATEMENT

Q.60 To what extent do you trust or distrust your gas supplier to ...

	Completely trust	Tend to trust	Neither trust nor distrust	Tend to distrust	Strongly distrust	Refused	Don't Know
Treat you fairly in their dealings with you?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Provide clear and helpful information for you?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Charge you a fair price for your gas?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Question 630

[Filter = All who have electricity only, or if gas and electricity, gas supplier is not the same as electricity supplier]
2478L1

SHOW SCREEN

Q.63 How satisfied or dissatisfied are you with the overall service you receive from your current electricity supplier?

- 1 ☐ Very satisfied
- 2 ☐ Satisfied
- 3 ☐ Neither satisfied nor dissatisfied
- 4 ☐ Dissatisfied
- 5 ☐ Very dissatisfied
- 8 ☐ Refused
- 9 ☐ Don't know

Question 6641

[Filter = All who have electricity only, or if gas and electricity, gas supplier is not the same as electricity supplier]

SHOW SCREEN AND READ OUT STATEMENT

SHOW SCREEN AND READ OUT STATEMENT

Q.64 To what extent do you trust or distrust your electricity supplier to...

	Completely trust	Tend to trust	Neither trust nor distrust	Tend to distrust	Strongly distrust	Refused	Don't Know
Treat you fairly in their dealings with you?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Provide clear and helpful information for you?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Charge you a fair price for your electricity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Question 670

[Filter = All who have gas and electricity and they have the same gas and electricity supplier]
2482L1

SHOW SCREEN

Q.67 How satisfied or dissatisfied are you with the overall service you receive from your current energy supplier?

- 1 ☐ Very satisfied
- 2 ☐ Satisfied
- 3 ☐ Neither satisfied nor dissatisfied
- 4 ☐ Dissatisfied
- 5 ☐ Very dissatisfied
- 8 ☐ Refused
- 9 ☐ Don't know

Question 6681

[Filter = All who have gas and electricity and they have the same gas and electricity supplier]

SHOW SCREEN AND READ OUT STATEMENT

SHOW SCREEN AND READ OUT STATEMENT

Q.68 To what extent do you trust or distrust your energy supplier to...

	Completely trust	Tend to trust	Neither trust nor distrust	Tend to distrust	Strongly distrust	Refused	Don't Know
Treat you fairly in their dealings with you?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Provide clear and helpful information for you?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Charge you a fair price for your gas and electricity?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Question 720

Answers will be displayed in random order

[Filter = All who have mains gas and/or mains electricity at home and are responsible for it]

SHOW SCREEN

SHOW SCREEN

Q.72 And please tell me the extent to which you trust or distrust the following to be fair in the way they deal with customers or citizens?

	Completely trust	Tend to trust	Neither	Tend to distrust	Completely distrust	Refused	Don't Know
Landline phone providers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Banks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Politicians	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
NHS Doctors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Insurance companies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The Police	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Water suppliers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Energy suppliers in general	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mobile phone providers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Estate Agents	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Question 710

[Filter = All who have mains gas and/or mains electricity at home and are responsible for it]

2486L1

SHOW SCREEN

Q.71 In the last 12 months, have you received a letter or leaflet from your energy supplier about their requirements to treat customers fairly?

Interviewer: these are the new 'Standards of Conduct'

- 1 ☐ Yes
- 2 ☐ No
- 8 ☐ Refused
- 9 ☐ Don't know

Question 730

[Filter = All who have mains gas and/or mains electricity at home and are responsible for it]

2497L1

SHOW SCREEN

Q.73 Thinking about the range of different tariffs available to you from energy suppliers, would you say that you have ...

- 1 ☐ Too much choice
- 2 ☐ About the right amount of choice
- 3 ☐ or too little choice
- 8 ☐ Refused
- 9 ☐ Don't know

Question 1450

[Filter = All who have mains gas and/or mains electricity at home and are responsible for it]

3613L2

SHOW SCREEN

Q.145 How easy or difficult do you believe it is to compare different tariffs for electricity or gas?

- 1 ☐ Very easy
- 2 ☐ Fairly easy
- 3 ☐ Neither easy nor difficult
- 4 ☐ Fairly difficult
- 5 ☐ Very difficult
- 6 ☐ Don't know

Question 7460

[Filter [54] = 1]

DO NOT SHOW SCREEN UNTIL TOLD TO DO SO

Question 1460

Multiple answers allowed - Order recorded:3715L9

Open ended answer is written as a bitmap

Maximum 3

[Filter = All who think it's very/fairly easy or very/fairly difficult to compare tariffs]

3615L100

MULTI CHOICE

Q.146 Why do you say that? DO NOT PROMPT

Interviewer: ask and code up to 3 responses

- 1 ☐ There is more information available on the internet from price comparison websites
- 2 ☐ There is more information available on the internet from suppliers
- 3 ☐ The information from suppliers is clearer these days
- 4 ☐ The information about tariffs from suppliers is too complicated
- 5 ☐ There are too many tariffs to choose from
- 6 ☐ There are too many suppliers
- 7 ☐ The tariffs are all structured differently
- 8 ☐ You can't trust the information that's available \ it's misleading
- 96 ☐ Other, namely...

Question 740

[Filter = All who have switched supplier, changed tariff, compared tariffs with other suppliers, or compared tariffs with their own supplier in the last year]

2498L1

SHOW SCREEN

Q.74 And would you say it is easier or harder to compare energy tariffs than a year ago?

- 1 ☐ Easier
- 2 ☐ About the same as a year ago
- 3 ☐ Harder
- 8 ☐ Refused
- 9 ☐ Don't know

Question 750

Multiple answers allowed

Open ended answer is written as a bitmap

User defined button : 99 "Don't know"

[Filter = All who think it is easier or harder to compare energy tariffs than a year ago]

2499L100

Q.75 Why do you say that?

Question 760

[Filter = All who have mains gas and/or mains electricity at home and are responsible for it]

2617L1

SHOW SCREEN

Q.76 In the last 12 months, have you contacted a current or previous energy supplier to complain at all?

- 1 ☐ Yes
- 2 ☐ No
- 8 ☐ Refused
- 9 ☐ Don't know

Question 770

Multiple answers allowed - Order recorded:3794L9

Open ended answer is written as a bitmap

Maximum 3

[Filter = All who have contacted a current or previous energy supplier to complain]

2636L100

SHOW SCREEN - MULTI CHOICE

Q.77 Can I just check which energy supplier(s) you have complained to in the last 12 months?

- 1 ☐ British Gas
- 2 ☐ Co-operative Energy
- 3 ☐ E.ON
- 4 ☐ Ebico
- 5 ☐ Ecotricity
- 6 ☐ EDF
- 7 ☐ First Utility
- 8 ☐ Good Energy
- 9 ☐ Marks & Spencer Energy
- 10 ☐ Npower
- 11 ☐ Ovo
- 12 ☐ Sainsburys Energy
- 13 ☐ Scottish Hydro
- 14 ☐ Scottish Power
- 15 ☐ Southern Electric
- 16 ☐ Spark Energy
- 17 ☐ SSE (Scottish and Southern Energy)
- 18 ☐ Swalec
- 19 ☐ Utility Warehouse
- 20 ☐ Other, namely...
- 98 ☐ Refused
- 99 ☐ Don't know

Question 780

[Filter = All who have contacted a current or previous energy supplier to complain]

2736L1

SHOW SCREEN

Q.78 How many issues have you needed to complain about in the last 12 months?

Interviewer: identify number of issues rather than number of contacts

- 1 ☐ One
- 2 ☐ Two
- 3 ☐ Three or more
- 8 ☐ Refused
- 9 ☐ Don't know

Question 790

Open ended answer is written as a bitmap

Answer categories mentioned in question 770 will be displayed

[Filter = All who have contacted a current or previous energy supplier to complain]

2737L2

SHOW SCREEN

Q.79 Which energy company did you most recently complain to?

- 1 ☐ British Gas
- 2 ☐ Co-operative Energy
- 3 ☐ E.ON
- 4 ☐ Ebico
- 5 ☐ Ecotricity
- 6 ☐ EDF
- 7 ☐ First Utility
- 8 ☐ Good Energy
- 9 ☐ Marks & Spencer Energy
- 10 ☐ Npower
- 11 ☐ Ovo
- 12 ☐ Sainsburys Energy
- 13 ☐ Scottish Hydro
- 14 ☐ Scottish Power
- 15 ☐ Southern Electric
- 16 ☐ Spark Energy
- 17 ☐ SSE (Scottish and Southern Energy)
- 18 ☐ Swalec
- 19 ☐ Utility Warehouse
- 20 ☐ Other, namely...
- 98 ☐ Refused
- 99 ☐ Don't know

Question 800

[Filter = All who have contacted a current or previous energy supplier to complain]

2739L1

SHOW SCREEN

Q.80 Thinking of the last time you complained, taking everything into account regarding the complaints process, how satisfied or dissatisfied were you overall with the way in which your complaint was handled by the energy supplier?

- 1 ☐ Very satisfied
- 2 ☐ Quite satisfied
- 3 ☐ Neither satisfied nor dissatisfied
- 4 ☐ Quite dissatisfied
- 5 ☐ Very dissatisfied
- 8 ☐ Refused
- 9 ☐ Don't know

Question 810

[Filter = All who have not contacted a current or previous energy supplier to complain]

2740L1

SHOW SCREEN

Q.81 Excluding any comment about their prices, do you believe you have had cause to complain to an energy supplier in the last year, but have not done so?

- 1 ☐ Yes
- 2 ☐ No
- 8 ☐ Refused
- 9 ☐ Don't know

Question 820

Multiple answers allowed

[Filter = All who have mains gas and/or mains electricity at home and are responsible for it]

2741L100

SHOW SCREEN - MULTI CHOICE

Q.82 Excluding complaints and giving routine meter readings, have you had any interaction with your own or another energy supplier in the last 12 months?

- 1 ☐ Yes - I contacted my current or previous energy supplier
- 2 ☐ Yes - I contacted another energy supplier
- 3 ☐ Yes - my current or previous energy supplier contacted me
- 4 ☐ Yes - another energy supplier contacted me
- 5 ☐ No
- 8 ☐ Refused
- 9 ☐ Don't know

Question 830

Open ended answer is written as a bitmap

[Filter = All who have had an interaction with an energy supplier in the past 12 months]

2841L2

SHOW SCREEN

Q.83 Which supplier did you have contact with most recently?

- 1 ☐ British Gas
- 2 ☐ Co-operative Energy
- 3 ☐ E.ON
- 4 ☐ Ebico
- 5 ☐ Ecotricity
- 6 ☐ EDF
- 7 ☐ First Utility
- 8 ☐ Good Energy
- 9 ☐ Marks & Spencer Energy
- 10 ☐ Npower
- 11 ☐ Ovo
- 12 ☐ Sainsburys Energy
- 13 ☐ Scottish Hydro
- 14 ☐ Scottish Power
- 15 ☐ Southern Electric
- 16 ☐ Spark Energy
- 17 ☐ SSE (Scottish and Southern Energy)
- 18 ☐ Swalec
- 19 ☐ Utility Warehouse
- 20 ☐ Other, namely...
- 98 ☐ Refused
- 99 ☐ Don't know

Question 840

[Filter = All who have had an interaction with an energy supplier in the past 12 months]

2843L2

SHOW SCREEN

Q.84 How satisfied or dissatisfied overall were you with the way the supplier dealt with you?

- 1 ☐ Very satisfied
- 2 ☐ Quite satisfied
- 3 ☐ Neither satisfied nor dissatisfied
- 4 ☐ Quite dissatisfied
- 5 ☐ Very dissatisfied
- 98 ☐ Refused
- 99 ☐ Don't know

Question 7008

[Filter [2] = 1]

The following questions are about how useful you find the information sent to you by your energy supplier\.

Question 940

[Filter = All who have mains gas and\or mains electricity at home and are responsible for it]

SHOW SCREEN

SHOW SCREEN

Q.94 Do you recall receiving any of the following from your gas or electricity supplier in the last 12 months? You may have received these via post or email.

Interviewer: read out

Price Increase Notification letters exclude letters regarding price reductions but include letters regarding any other changes to a consumer's tariff price.

	Yes	No	Refused	Don't know
An annual summary or review (containing details about your own energy tariff and energy use)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
At least one bill or direct debit\prepayment statement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A price increase notification letter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A letter informing you your fixed term tariff is coming to an end	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Question 8094

Multiple answers allowed
2885L50

Dummy to know what all sections coded yes at Q94

- 1 ☐ An annual summary or review (containing details about your own energy tariff and energy use)
- 2 ☐ At least one bill or direct debit\prepayment statement
- 3 ☐ A price increase notification letter
- 4 ☐ A letter informing you your fixed term tariff is coming to an end

Question 8194

Multiple answers allowed
2935L50

- 1 ☐ An annual summary or review (containing details about your own energy tariff and energy use)
- 2 ☐ At least one bill or direct debit\prepayment statement
- 3 ☐ A price increase notification letter
- 4 ☐ A letter informing you your fixed term tariff is coming to an end
- 5 ☐ A dead tariff notice (a notice that your supplier is moving you onto a new tariff to get a better deal)

Question 950

[Filter = All who have received an annual energy summary in the past 12 months]
3003L1

SHOW SCREEN

Q.95 Thinking about when you last received an annual summary, in how much detail did you look at it?

- 1 ☐ Read it in detail
- 2 ☐ Glanced over it or skim read it
- 3 ☐ Only saw what it was, but did not read it
- 8 ☐ Refused
- 9 ☐ Don't know

Question 960

[Filter = All who read/glanced at annual energy summary]
3022L1

SHOW SCREEN

Q.96 And how clearly or unclearly do you think the information was presented to you in the annual summary?

- 1 ☐ Very clearly
- 2 ☐ Quite clearly
- 3 ☐ Neither clearly nor unclearly
- 4 ☐ Quite unclearly
- 5 ☐ Very unclearly
- 8 ☐ Refused
- 9 ☐ Don't know

Question 970

[Filter = All who read/glanced at annual energy summary]

3023L1

SHOW SCREEN

Q.97 And how easy or difficult did you find it to understand the information in the annual summary?

- 1 ☐ Very easy
- 2 ☐ Quite easy
- 3 ☐ Neither easy nor difficult
- 4 ☐ Quite difficult
- 5 ☐ Very difficult
- 8 ☐ Refused
- 9 ☐ Don't know

Question 980

[Filter = All who read/glanced at annual energy summary]

SHOW SCREEN

SHOW SCREEN

Q.98 Did you take any of the following action as a result of receiving the annual summary?

Interviewer: read out

	Yes	No	Refused	Don't know
I checked what I'm currently paying for my energy or found out more about the tariff that I'm on	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I looked into switching tariffs with my <u>current supplier</u>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I looked into switching to a different supplier	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I thought about switching tariffs either with this supplier or a different supplier, but have not yet started looking	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If [3025 , 1 or 3026 , 1 and 3027 , 1] otherwise continue at question 71410

You cannot code yes for statement 4, please go back and change the answer.

Question 1410

[Filter = All who read/glanced at annual energy summary]

3028L1

SHOW SCREEN

Q.141 Do you recall seeing a message on your annual summary about savings you could make by changing tariff or payment method with your current supplier?

- 1 ☐ Yes
- 2 ☐ No
- 8 ☐ Refused
- 9 ☐ Don't know

Question 990

[Filter = All who have received a bill or direct debit payment statement in the past 12 months]

3047L1

SHOW SCREEN

Q.99 Thinking about when you last received a bill or direct debit\prepayment statement , in how much detail did you look at it?

- 1 ☐ Read it in detail
- 2 ☐ Glanced over it or skim read it
- 3 ☐ Only saw what it was, but did not read it
- 8 ☐ Refused
- 9 ☐ Don't know

Question 1000

[Filter = All who read/glanced at bill or direct debit payment statement]

3066L1

SHOW SCREEN

Q.100 And how clearly or unclearly do you think the information was presented to you in the bill or direct debit\prepayment statement?

- 1 ☐ Very clearly
- 2 ☐ Quite clearly
- 3 ☐ Neither clearly nor unclearly
- 4 ☐ Quite unclearly
- 5 ☐ Very unclearly
- 8 ☐ Refused
- 9 ☐ Don't know

Question 1010

[Filter = All who read/glanced at bill or direct debit payment statement]

3067L1

SHOW SCREEN

Q.101 And how easy or difficult did you find it to understand the information in the bill or direct debit/prepayment statement?

- 1 ☐ Very easy
- 2 ☐ Quite easy
- 3 ☐ Neither easy nor difficult
- 4 ☐ Quite difficult
- 5 ☐ Very difficult
- 8 ☐ Refused
- 9 ☐ Don't know

Question 1020

[Filter = All who read/glanced at bill or direct debit payment statement]

SHOW SCREEN

SHOW SCREEN

Q.102 Did you take any of the following action as a result of receiving the bill or direct debit/prepayment statement?

Interviewer: read out

	Yes	No	Refused	Don't know
I checked what I'm currently paying for my energy or found out more about the tariff that I'm on	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I looked into switching tariffs with my <u>current supplier</u>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I looked into switching to a different supplier	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I thought about switching tariffs either with this supplier or a different supplier, but have not yet started looking	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If [3069 , 1 or 3070 , 1 and 3071 , 1] otherwise continue at question 71420

You cannot code yes for statement 4, please go back and change the answer.

Question 1420

[Filter = All who read/glanced at bill or direct debit payment statement]

3072L1

SHOW SCREEN

Q.142 Do you recall seeing a message on your bill or direct debit/prepayment statement about savings you could make by changing tariff or payment method with your current supplier?

- 1 ☐ Yes
- 2 ☐ No
- 8 ☐ Refused
- 9 ☐ Don't know

Question 1030

[Filter = All who have received a price increase notification letter in the past 12 months]

3091L1

SHOW SCREEN

Q.103 Thinking about when you last received a price increase notice, in how much detail did you look at it?

- 1 ☐ Read it in detail
- 2 ☐ Glanced over it or skim read it
- 3 ☐ Only saw what it was, but did not read it
- 8 ☐ Refused
- 9 ☐ Don't know

Question 1040

[Filter = All who read/glanced at the price increase notification letter]

3110L1

SHOW SCREEN

Q.104 And how clearly or unclearly do you think the information was presented to you in the price increase notice?

- 1 ☐ Very clearly
- 2 ☐ Quite clearly
- 3 ☐ Neither clearly nor unclearly
- 4 ☐ Quite unclearly
- 5 ☐ Very unclearly
- 8 ☐ Refused
- 9 ☐ Don't know

Question 1050

[Filter = All who read/glanced at the price increase notification letter]

3111L1

SHOW SCREEN

Q.105 And how easy or difficult did you find it to understand the information in the price increase notice?

- 1 ☐ Very easy
- 2 ☐ Quite easy
- 3 ☐ Neither easy nor difficult
- 4 ☐ Quite difficult
- 5 ☐ Very difficult
- 8 ☐ Refused
- 9 ☐ Don't know

Question 1060

[Filter = All who read/glanced at the price increase notification letter]

SHOW SCREEN

SHOW SCREEN

Q.106 Did you take any of the following action as a result of receiving the price increase notice?

Interviewer: read out

	Yes	No	Refused	Don't know
I checked what I'm currently paying for my energy or found out more about the tariff that I'm on	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I looked into switching tariffs with my <u>current supplier</u>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I looked into switching to a different supplier	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I thought about switching tariffs either with this supplier or a different supplier, but have not yet started looking	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If [3113 , 1 or 3114 , 1 and 3115 , 1] otherwise continue at question 71430

You cannot code yes for statement 4, please go back and change the answer.

Question 1430

[Filter = All who read/glanced at the price increase notification letter]

3116L1

SHOW SCREEN

Q.143 Do you recall seeing a message on your price increase notification letter about savings you could make by changing tariff or payment method with your current supplier?

- 1 ☐ Yes
- 2 ☐ No
- 8 ☐ Refused
- 9 ☐ Don't know

Question 1070

[Filter = All who have received a letter informing them their fixed term tariff is coming to an end, in the past 12 months]

3135L1

SHOW SCREEN

Q.107 Thinking about when you last received an end of fixed term letter, in how much detail did you look at it?

- 1 ☐ Read it in detail
- 2 ☐ Glanced over it or skim read it
- 3 ☐ Only saw what it was, but did not read it
- 8 ☐ Refused
- 9 ☐ Don't know

Question 1080

[Filter =All who read/glanced at the letter informing them their fixed term tariff is coming to an end]

3154L1

SHOW SCREEN

Q.108 And how clearly or unclearly do you think the information was presented to you in the end of fixed term letter?

- 1 ☐ Very clearly
- 2 ☐ Quite clearly
- 3 ☐ Neither clearly nor unclearly
- 4 ☐ Quite unclearly
- 5 ☐ Very unclearly
- 8 ☐ Refused
- 9 ☐ Don't know

Question 1090

[Filter =All who read/glanced at the letter informing them their fixed term tariff is coming to an end]

3155L1

SHOW SCREEN

Q.109 And how easy or difficult did you find it to understand the information in the end of fixed term letter?

- 1 ☐ Very easy
- 2 ☐ Quite easy
- 3 ☐ Neither easy nor difficult
- 4 ☐ Quite difficult
- 5 ☐ Very difficult
- 8 ☐ Refused
- 9 ☐ Don't know

Question 1100

[Filter =All who read/glanced at the letter informing them their fixed term tariff is coming to an end]
SHOW SCREEN

SHOW SCREEN

Q.110 Did you take any of the following action as a result of receiving the end of fixed term letter?

Interviewer: read out

	Yes	No	Refused	Don't know
I checked what I'm currently paying for my energy or found out more about the tariff that I'm on	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I looked into switching tariffs with my <u>current supplier</u>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I looked into switching to a different supplier	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I thought about switching tariffs either with this supplier or a different supplier, but have not yet started looking	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If [3157 , 1 or 3158 , 1 and 3159 , 1] otherwise continue at question 71440

You cannot code yes for statement 4, please go back and change the answer.

Question 1440

[Filter =All who read/glanced at the letter informing them their fixed term tariff is coming to an end]
3160L1

SHOW SCREEN

Q.144 Do you recall seeing a message on your end of fixed term letter about savings you could make by changing tariff or payment method with your current supplier?

- 1 ☐ Yes
- 2 ☐ No
- 8 ☐ Refused
- 9 ☐ Don't know

Question 1190

[Filter = All who have mains gas and/or mains electricity at home and are responsible for it]

SHOW SCREEN**SHOW SCREEN****Q.119 If you have them, have you ever switched your provider for any of the following services?**

	Yes	No	Does not apply	Refused	Don't know
Mortgage	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Car insurance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Home insurance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Landline phone calls	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mobile phone network	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Internet or broadband provider	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cash ISA	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Balance transfer on a credit card	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Current Account	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Question 1200

Answer categories mentioned in question 8120 will be displayed

[Filter = All who have mains gas and/or mains electricity at home and are responsible for it]

SHOW SCREEN

SHOW SCREEN

Q.120 And for those you have ever switched, which of these services have you switched in the last 12 months?

	Yes	No	Does not apply	Refused	Don't Know
Mortgage	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Car insurance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Home insurance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Landline phone calls	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mobile phone network	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Internet or broadband provider	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cash ISA	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Balance transfer on a credit card	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Current Account	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Question 1210

Answers will be displayed in random order

[Filter = All who have mains gas and/or mains electricity at home and are responsible for it]

SHOW SCREEN

SHOW SCREEN

Q.121 To what extent do you agree or disagree with the following statements about energy suppliers?

	Agree strongly	Tend to agree	Neither agree nor disagree	Tend to disagree	Disagree strongly	Don't Know	Refused
Changing tariff with your existing supplier is a good way to save money	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Some energy suppliers are more trustworthy than others	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I don't think I'd be able to switch even if I wanted to	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I'm happy with my current supplier and I see no need to switch	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would switch if my supplier let me down on customer service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There are no real differences between suppliers in the prices they charge	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Switching is a hassle that I've not got time for	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
It's getting harder to understand all the information I receive from suppliers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I worry that if I switch things will go wrong	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel reasonably confident I know enough about how to switch suppliers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
It's too hard to work out whether I would save or not if I switched	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I check now and again to see if it's worth me switching supplier or tariff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Question 71220

[Filter [2] = 1]

DO NOT SHOW SCREEN UNTIL TOLD TO DO SO

Question 1220

Multiple answers allowed - Order recorded:3411L9

Open ended answer is written as a bitmap

Maximum 3

[Filter = All who have mains gas and/or mains electricity at home and are responsible for it]

3311L100

MULTI CHOICE

Q.122 What factors matter most to you when choosing your energy supplier or tariff?

Interviewer: ask and code up to 3 responses DO NOT PROMPT

- 1 ☐ Tariff price
- 2 ☐ Customer service
- 3 ☐ Having a greener tariff
- 4 ☐ Having a fixed term tariff
- 5 ☐ Having an online tariff
- 6 ☐ The reputation of the supplier
- 7 ☐ Getting a smart meter \ in home display
- 8 ☐ Home energy related incentives (e.g. boiler maintenance, home insulation)
- 9 ☐ Other incentives (e.g. Nectar points, wine)
- 10 ☐ Preference for Big 6 (British Gas, Scottish Power, SSE, Eon, NPower, EDF)
- 11 ☐ Preference to avoid the Big 6 (British Gas, Scottish Power, SSE, Eon, NPower, EDF)
- 12 ☐ A supplier I know
- 13 ☐ Other, namely...
- 96 ☐ Refused
- 98 ☐ Don't know

Question 1230

[Filter = All who have mains gas at home and did not receive a dual fuel discount]

3438L1

SHOW SCREEN

Q.123 Thinking of the factors that matter most to you, how confident are you that you are currently on the best gas deal for you?

- 1 ☐ Very confident
- 2 ☐ Fairly confident
- 3 ☐ Neutral
- 4 ☐ Not very confident
- 5 ☐ Not confident at all
- 8 ☐ Refused
- 9 ☐ Don't know

Question 1240

[Filter = All who have mains electricity at home and did not receive a dual fuel discount]

3439L1

SHOW SCREEN

Q.124 Thinking of the factors that matter most to you, how confident are you that you are currently on the best electricity deal for you?

- 1 ☐ Very confident
- 2 ☐ Fairly confident
- 3 ☐ Neutral
- 4 ☐ Not very confident
- 5 ☐ Not confident at all
- 8 ☐ Refused
- 9 ☐ Don't know

Question 1250

[Filter = All who have mains gas AND electricity at home and received a dual fuel discount for buying from

SHOW SCREEN

Q.125 Thinking of the factors that matter most to you, how confident are you that you are currently on the best energy deal for you?

- 1 ☐ Very confident
- 2 ☐ Fairly confident
- 3 ☐ Neutral
- 4 ☐ Not very confident
- 5 ☐ Not confident at all
- 8 ☐ Refused
- 9 ☐ Don't know

Question 1260

[Filter = All who have mains gas and/or mains electricity at home and are responsible for it]

SHOW SCREEN

SHOW SCREEN

Q.126 How likely would you be to switch either gas or electricity supplier ...

	Definitely	Very likely	Fairly likely	Not very likely	Not at all likely	Definitely not	Refused	Don't know
in the next 12 months?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
in the next 5 years?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Question 1270

Answers will be displayed in random order

[Filter = All who have mains gas and\or mains electricity at home and are responsible for it]

SHOW SCREEN

SHOW SCREEN

Q.127 And now I want to read out some statements about your more general attitudes. Could you tell me the extent to which you agree or disagree with the following statements?

	Strongly agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Strongly disagree	Refused	Don't know
Everything seems to be getting more complicated these days	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I always find out everything I can about a product before I decide to buy it	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I always like to look for ways that I can save money, even if it is only a little	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I prefer to talk to a salesperson before I buy things	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I often make a decision on impulse	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I always feel some worry or anxiety when things I am used to start to change	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Financially things are a bit of a struggle for me	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I always check bank or building society statements when I get them, including online	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I think about the effects on the environment of my purchasing decisions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Question 1001570

[Filter [2] = 1]

DO NOT SHOW SCREEN UNTIL TOLD TO DO SO

Question 1280

[Filter = All who have mains gas and\or mains electricity at home and are responsible for it]

3508L1

SHOW SCREEN

Q.128 How often do you use the internet:

- 1 ☐ Roughly every day
- 2 ☐ At least once a week
- 3 ☐ At least once a month
- 4 ☐ Less often than once per month
- 5 ☐ Never - but I do have access
- 6 ☐ Never - and I do not have access
- 8 ☐ Refused
- 9 ☐ Don't know

Question 1290

[Filter = All who have mains gas and/or mains electricity at home and are responsible for it]

3527L1

SHOW SCREEN

Q.129 Can I check, is English your first or main language?

If 'Yes', Probe - 'Is English the only language you speak or do you speak any other languages?'

- 1 ☐ Yes - English only
- 2 ☐ Yes - English first \main and speaks other languages
- 3 ☐ No - Another first\main language
- 4 ☐ Bilingual - consider both languages as main
- 8 ☐ Refused
- 9 ☐ Don't know

Question 1300

[Filter = All who have mains gas and/or mains electricity at home and are responsible for it]

3528L2

SHOW SCREEN

Q.130 What is the highest level of education you have completed?

Please select one answer only

- 1 ☐ Post graduate degree (MA, MSc, PhD etc)
- 2 ☐ Degree
- 3 ☐ Professional qualifications
- 4 ☐ HND\HNC
- 5 ☐ A Levels\AS Levels
- 6 ☐ GCSE\O Levels\CSE
- 7 ☐ ONC\OND\City & Guilds
- 8 ☐ GNVQ
- 97 ☐ None of the above
- 96 ☐ Refused
- 98 ☐ Don't know

Question 1312

Multiple answers allowed

[Filter = All who have mains gas and/or mains electricity at home and are responsible for it]

3803L50

Q.131 Do you or your husband\wife\partner have any long-term illness, physical or mental health problem or disability which limits your daily activities or the work you can do?

Include problems which are due to old age.

- 1 ☐ Yes, I do
- 2 ☐ Yes, my husband\wife\partner does
- 3 ☐ No
- 8 ☐ Refused
- 9 ☐ Don't know

Question 1320

[Filter = All who have mains gas and/or mains electricity at home and are responsible for it]

3531L1

Q.132 And do you or your husband\wife\partner have any caring responsibilities for a member of your immediate family, or, a close relative outside of your household who has any long-standing illness, physical or mental health problem or disability?

Include caring for relatives with problems due to old age.

- 1 ☐ Yes
- 2 ☐ No
- 8 ☐ Refused
- 9 ☐ Don't know

Question 1330

[Filter = All who have mains gas and/or mains electricity at home and are responsible for it]

3532L2

SHOW INCOME CARD

Q.133 This card shows incomes in weekly, monthly and annual amounts. Which of the groups on the card represents your personal\you and your husband's\wife's\ partner's combined income before any deductions such as income tax or National Insurance? Please include income from earnings, self-employment, benefits, pensions, and interest from savings. Just tell me the letter beside the row that applies to you.

- 1 ☐ A. Under £100 \ Under £400 \ Under £5,000
- 2 ☐ B. £100 - £199 \ £400 - £829 \ £5,000 - £9,999
- 3 ☐ C. £200 - £289 \ £830 - £1,249 \ £10,000 - £14,999
- 4 ☐ D. £290 - £389 \ £1,250 - £1,649 \ £15,000 - £19,999
- 5 ☐ E. £390 - £489 \ £1,650 - £2,099 \ £20,000 - £24,999
- 6 ☐ F. £490 - £579 \ £2,100 - £2,499 \ £25,000 - £29,999
- 7 ☐ G. £580 - £679 \ £2,500 - £2,899 \ £30,000 - £34,999
- 8 ☐ H. £680 - £769 \ £2,900 - £3,349 \ £35,000 - £39,999
- 9 ☐ I. £770 - £869 \ £3,350 - £3,749 \ £40,000 - £44,999
- 10 ☐ J. £870 - £969 \ £3,750 - £4,149 \ £45,000 - £49,999
- 11 ☐ K. £970 - £1,149 \ £4,150 - £4,999 \ £50,000 - £59,999
- 12 ☐ L. £1,150 - £1,349 \ £5,000 - £5,849 \ £60,000 - £69,999
- 13 ☐ M.£1,350 - £1,549 \ £5,850 - £6, 649 \ £70,000 - £79,999
- 14 ☐ N. £1,550 or over \ £6,650 or over \ £80,000 or over
- 15 ☐ SPONTANEOUS ONLY: Nothing\no work or scheme
- 96 ☐ Refused
- 98 ☐ Don't know

Question 1340

[Filter = All who are Not working or Don't know income or Refused income]

3534L1

Q.134 Can I just check, is your own\your own and your partner's total income, before tax and any other deductions more or less than £16,000 per year?

If the respondent has a partner then we would like combined income.

- 1 ☐ Less than £16,000
- 2 ☐ £16,000 or more
- 8 ☐ Refused
- 9 ☐ Don't know

Question 1350

[Filter = All who have mains gas and/or mains electricity at home and are responsible for it]

3535L1

Q.135 Have you moved house in the last 12 months?

- 1 ☐ Yes - once
- 2 ☐ Yes - more than once
- 3 ☐ No
- 8 ☐ Refused
- 9 ☐ Don't know

Question 1360

[Filter = All who have mains gas and/or mains electricity at home and are responsible for it]

3536L1

Q.136 Would you be willing for Ofgem, or a research agency appointed by them, to contact you again about any of these issues in the future?

- 1 ☐ Yes
- 2 ☐ No

