



CONSUMER ENGAGEMENT IN THE ENERGY MARKET 2017

Technical report on a survey of energy consumers
Research conducted on behalf of:

ofgem Making a positive difference
for energy consumers

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1 Survey methodology

1.1 2017 Consumer Engagement Survey

Fieldwork for the 2017 survey was carried out between 21st March and 26th April 2017, in home and face to face using Computer Assisted Personal Interviewing (CAPI). Interviews were carried out with 4,001 gas and/or electricity consumers, including 3,544 with both mains gas and electricity, 26 consumers (1% of the total sample) with mains gas only, and 431 (11% of the total sample) with mains electricity only. Overall, 3,570 respondents had mains gas, and 3,975 had electricity. Following this, 12 qualitative interviews were conducted with a range of people across the six segments determined in the quantitative phase, in order to add depth and personal experiences to the insights.

1.2 Sample universe and survey eligibility

The target sample for the 2017 survey was the same as at previous waves: all respondents were at least 16 years old, resident in Great Britain, and met the following survey-specific eligibility criteria:

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

The above criteria were applied through screening questions at the beginning of the survey. Consequently, the following groups were excluded from the sample¹:

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

1.3 Stratification and sample point selection

This survey used random location sampling, which provides interviewers with lists of addresses in which they must interview in order to achieve a nationally representative sample². The address listings for the Consumer Engagement Survey were selected using the following steps:

1. All GB constituencies were listed and stratified by:
 - a. Region (former Government Office Regions)³ – this includes Scotland, Wales and the nine Regions in England;
 - b. Urban/rural indicator (Metropolitan County, Other 100% Urban, Mixed Urban/Rural, Rural);
 - c. Percentage of residents in AB socioeconomic group.
2. 294 constituencies were selected with probability proportional to population aged 16+;

¹ Previous waves of the Consumer Survey were run on an omnibus survey (which interviews a representative sample of the population). Screening questions were included in the omnibus survey to establish who was eligible to participate, and ineligible respondents were not asked the Ofgem questions. In 2017, the survey was not conducted on an omnibus, but instead as an ad-hoc study. Because of the sampling methods used, screen-out rates were not recorded.

² Random location sampling is widely used in largescale face to face government surveys as a good proxy for Random Probability sampling. Unlike with Random Probability sampling, an element of interviewer selection bias is introduced in the design: interviewers are restricted to interviewing only in the fixed address listings, which should not be deviated from, but can choose any household or respondent that fits their quotas within these restrictions. This ensures as close to a nationally representative spread of interviews as possible, but the survey results obtained from a random location sample can be treated as only indicative of the actual figures in the sample universe at large. This is in contrast to Random Probability sampling, where each respondent is chosen at the sample design stage, eliminating all interviewer bias, and survey results can be assumed to be representative of the sample universe at large.

³ <https://www.ons.gov.uk/methodology/geography/ukgeographies/administrativegeography/england#regions-former-gors>

3. One Census Output Area (OA) was selected at random from each constituency (each OA includes an average of .120-150 residential addresses);
4. A paired OA was selected, from within the original sampled constituency (so the addresses are close geographically), to produce an interviewer assignment of around 250-300 addresses;
5. Full address listings were produced, and assigned to interviewers.

1.4 Interviewing

In total, 291 sampling points were issued to 131 interviewers across Great Britain, with interviewers required to conduct 14 interviews per point, spread over a two-day assignment.

Interviewers were issued with quotas to ensure that the final achieved sample represented the target. Because we were interviewing someone in the household who is responsible/jointly responsible for the gas and electricity bills, age quotas were originally created from the head of household (HOH) profiles from GfK's Financial Research Survey⁴. Interlocked age and working status profiles were designed in line with those achieved in previous surveys⁵ to ensure comparability.

Quota group	Number of interviews set	%
16-34	882	21%
35-54	1,470	36%
55+	1,764	43%
Male working full time	1,176	29%
Male NOT working full time	882	21%
Female working full/part time	1,078	26%
Female NOT working full/part time	980	24%

Quotas were set nationally to produce a nationally representative sample, but were tailored for each sampling point to reflect the population profile in that area. Regional quota delivery targets were produced to better enable monitoring and fieldwork management.

Interviewers went door to door within their selected areas, screening in households to identify eligible respondents, and attempting to recruit them to complete a full interview. After completing an interview, interviewers were instructed to leave four clear houses before making their next call, and they were not permitted to conduct more than four interviews in any one road. Only one respondent per household could be interviewed, and interviewers had to ensure that the respondent was a resident at the address before the interview took place.

⁴ GfK Financial Research Survey: A syndicated survey of financial holdings behaviour and attitudes based on a sample of 60,000 per year using mixed interview mode of face to face and online interviews.

⁵ https://www.ofgem.gov.uk/system/files/docs/2016/08/consumer_engagement_survey_2016_-_technical_report.pdf

2 Questionnaire design

The original questionnaire was designed by Ofgem and TNS BMRB (now Kantar Public) for the 2014 baseline study and the 2015 and 2016 surveys. The 2017 survey involved some significant revisions to the questionnaire, a process carried out by Ofgem and GfK in close collaboration. Changes to the 2017 questionnaire were made with a view to improve and refine where possible, to make room for new measures (including those that would act as inputs to the new segmentation), but also - for key tracking data - to maintain maximum comparability with past years.

The median interview length for the 2017 survey was 26 minutes.

2.1 Main questionnaire changes between 2016 and 2017

All changes to the questionnaire were logged, throughout the development process. An outline of all changes (additions, amendments and deletions) made between 2016 and 2017, and a full version of the 2017 questionnaire and filters used, are provided in section 0.

We will outline some of the biggest changes to the questionnaire here in more detail:

2.1.1 Segmentation: development of input questions

One significant change to the questionnaire in 2017 was the introduction of the attitudinal measures that would form the basis of the consumer engagement segmentation. To help identify the most appropriate attitudinal measures to use as segmentation inputs, it was necessary to define and understand the concept of consumer engagement, particularly with reference to the energy market, and identify the consumer attitudes that might have an impact on engagement. Segmentation input questions were developed by GfK through the following process:

1. A rapid knowledge review, carried out by GfK, including:
 - a. a review of existing literature and surveys on the subject of consumer engagement, with particular reference to the energy market, but also other markets;
 - b. a key driver analysis of existing datasets to establish the key drivers of consumer engagement in the energy market;
2. A workshop of key stakeholders, to present the findings of the rapid knowledge review and refine the list of input measures;
3. Drafting of a pilot questionnaire, including segmentation input measures agreed with Ofgem following the above review and consultation;
4. A two-stage pilot of the whole questionnaire (more details in section 2.2), to fine tune the segmentation measures and other new questions added in 2017;
5. Production of the final questionnaire, following feedback from the pilot interviews and further consultation with Ofgem.

A list of the resulting attitudinal measures used as input to the segmentation, and further detail about the segmentation process itself, are included in section 3.5.

2.1.2 Introduction of questions on smart meters

Five questions on smart meters were introduced in the 2017 survey (SM1 to SM6 – see section 5.1), in order to understand customer awareness of the rollout and of what smart meters are, as well as the effect of smart meter ownership on engagement. A proxy measure of smart meter ownership was calculated at the analysis stage.

Respondents were identified as having a smart meter if they answered that they had a smart meter, as measured by new question SM4, AND were aware of both of the following (as measured by question SM3):

- (a) smart meters allow you to see in pounds and pence the amount of energy you are using in real time, and

- (b) a smart meter in your home means you will receive accurate bills rather than estimated ones from your energy supplier

This approach to determining smart meter ownership was used to ensure that identification of those with a smart meter was as accurate as possible, effectively removing those who may, for example, have confused other smart energy devices (e.g. smart thermostats) with a smart meter. We understand that there is some under-claiming of smart meter ownership in Britain: while nine per cent of consumers in the 2017 survey said they had a smart meter, the actual figure is closer to 15%.

2.1.3 Measuring key engagement indicators

Changes were made to the way key engagement behaviours were measured in the 2017. These included supplier switching and tariff switching with an existing supplier, and whether respondents had engaged in other activities such as comparing tariffs with others offered by their own or a different supplier, or changing payment method.

In past waves, respondents were asked if they had switched gas / electricity in the past 12 months (Q18/19), and those that had not were asked if they had ever switched supplier (Q20), how many times they had done this (Q21/22), and when they had last done this (Q138/139).

In 2017, respondents were asked how many times (if at all) they had switched their gas / electricity supplier (Q21/22), and then when they had last switched (Q138./139). This reduced question set still enabled us to identify recent (past 12 month) switchers and ever switchers, but was quicker to administer.

The above changes were made to aid flow, increase questionnaire efficiency, and to allow us to identify the CMA database group. The CMA database group is defined as those who have been on the same supplier's Standard Variable Tariff (SVT) for more than three years; for the purposes of this research, a proxy measure was used at the analysis stage, of those who had not switched supplier for the last four years⁶.

Please see section 5.1 for the question wordings (2016 and 2017) and for similar changes in the way we measure tariff changing (TmesG/TmesE and WhnsG/WhnsE), and comparing suppliers/tariffs and changing payment method (see new questions ChngG/ChngE).

2.1.4 Setting a priority for follow up questions

In previous years, respondents who had engaged in the market at all were asked further questions about their experiences. In order to reduce the overall interview length and minimise respondent fatigue, a decision was taken to limit follow-up questions to engagement the consumer had taken in the last year only.

A priority was also set to ensure that we gain sufficient responses about each type of action (supplier switch, tariff switch, comparison), based on the penetration of each action in the population, and also the associated level of engagement.

A further benefit of this approach was a more precise understanding of precisely which action respondents were answering about. In 2016, many questions which collected further details on respondents' switching/comparing experiences were asked in a general way which did not allow analysis by type of engagement. For example, at q160, the question wording was, "Thinking of the last time you switched or compared <gas/ electricity/ gas and electricity> supplier or tariffs, what were the main things you wanted to achieve?". We knew whether the last action involved gas, electricity or

⁶ The rationale behind this decision was to enable the inclusion of people whose last switch was to a 12 month fixed term deal. Those who had switched onto a fixed term deal 4 years ago are likely to have rolled onto a SVT at the end of that deal (likely 3 years ago) and if they had not switched again would be likely to be in the CMA database group.

both, but not whether respondents were talking about switching, changing tariff or comparing tariffs. Another disadvantage of this approach was that not specifying an activity can lead to respondents giving vague responses and limit analysis.

The priority was set on a respondent level according to their highest level of engagement in the energy market in the past 12 months, based on their answers to engagement questions outlined above.

A dummy variable was set for each respondent (labelled Dummset in the questionnaire), and this drove the decision on which actions on which to follow up, and also drove the corresponding question wording using a text substitution variable (labelled Dumm1 in the questionnaire). The priority ranking was as follows, with 1 being the highest priority.

1. Switched supplier in past 12 months
2. Switched tariff in past 12 months
3. Compared tariffs/suppliers in past 12 months

Consequently, the new wording for q160 is: "Thinking of the last time you <answer from Dumm1>, what were your priorities?" (NB. other aspects of the question wording were also changed this year).

This means that data from 2016 and 2017 are no longer directly comparable, though comparisons are made in the report, and trends are generally fairly stable.

2.1.5 Additional questions on Price Comparison Websites (PCWs)

In 2017, Ofgem wished to collect expand the data collected on PCWs; as such, the following three questions were added:

- **Deals:** This new question asks respondents how many PCWs they used when they last switched or compared, to ascertain the proportion of consumers who 'multi-home', or use more than one PCW when shopping around.
- **PCWSw:** This question was added to double check whether the switch was actually carried out through the PCW, as opposed to the respondent having found the deal online, but completed the switch some other way, e.g. by calling the supplier. At the analysis stage, if respondents fell into the latter category, their response at Q156 was edited so that they were not counted as having switched through a PCW.
- **PCWSt:** This is a new battery of agreement questions to gauge consumers' attitudes to PCWs in general.

Please refer to section 5.1 for more details and question / response wordings.

2.2 Piloting the questionnaire

Questionnaire piloting consisted of two strands:

- **Eight cognitive interviews** conducted by GfK researchers to understand comprehension of question wording and highlight any areas of difficulty;
- **22 interviewer-led pilot interviews**, the main objectives of which were to test introduction wording and its impact on participation, gauge overall survey length, and observe overall survey flow 'in the field'. The secondary objective of the interviewer pilot was to test question wording.

The cognitive interviews were carried out using telephone and online webinar. Participants were telephoned, and were also logged on to a secure webinar site which enabled the researcher to simultaneously share their computer screen with them to replicate what respondents would see on a CAPI machine in a face-to-face interview. The researcher worked through the full interview with the participant, with additional time taken during the interview to seek clarification, check comprehension

of key questions, and better understand reasoning behind responses given. There was a particular focus on new or altered questions, and identifying areas of difficulty or ambiguity.

Cognitive interview participants were recruited through an external agency, Criteria, with the following quotas set to ensure a spread of participant characteristics:

- Five ABC1s / Five C2DEs
- Four tenants / Four owner occupiers
- Six who has switched supplier and/or tariff in the past 12 months
- One who did not speak English as a first language
- Two who had a Smart Meter

In the interviewer-led pilot, interviewers were asked to obtain a spread of age, gender and working status: they did not work to hard (compulsory) quotas, so as to maximise the number of interviews that could be conducted in a short period of time, and also to gain a spread of responses.

Interviewers were briefed by telephone before starting work, including briefing on a feedback document they were asked to complete as part of the piloting process. A telephone debrief with the interviewers collated feedback from the interviewers and their respondents, and fed into questionnaire amendments.

A full pilot report of the pilot, together with recordings of the cognitive interviews was shared with Ofgem (the latter with respondents' consent.) Changes to the questionnaire were agreed following the pilot report, and the final questionnaire was signed off with Ofgem.

3 Analysis and reporting

3.1 Weighting

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.

Because the previous surveys were run as part of an omnibus, cases were weighted as follows:

- All cases (including ineligible respondents) were weighted to a nationally representative (all adults 16+) profile, with weighting based on age and social grade within gender, working status within gender and Government Office Region.
- Ineligible respondents (i.e. those without responsibility for their household energy supply) were then filtered out of the dataset.

Because the 2017 survey was not conducted using an omnibus, we were not able to collect the demographic detail of ineligible respondents and so could not follow the same process. Therefore a different weighting strategy was required, though it was necessary to maintain the overall profile of the target group. Weights for the 2017 survey were set based on the profile of eligible respondents in 2016, using the same variables (namely age and social grade within gender, working status within gender and Government Office Region). Weighted and unweighted profiles are shown below.

Table 3.1 Weighted and unweighted profiles

SOCIAL GRADE WITHIN GENDER				
	Weighted		Unweighted	
	Male	Female	Male	Female
ABC1				
16-24	1.0%	1.6%	0.9%	0.7%
25-34	4.1%	3.4%	3.5%	3.7%
35-54	11.0%	10.5%	8.6%	9.4%
55+	11.9%	12.1%	10.1%	8.5%
C2				
16-24	0.4%	0.6%	0.4%	0.4%
25-34	1.8%	1.4%	2.1%	1.6%
35-54	4.4%	3.4%	3.9%	4.0%
55+	4.4%	3.7%	4.7%	2.8%
DE				
16-24	0.6%	1.0%	0.6%	1.1%
25-34	1.3%	2.0%	1.8%	3.1%
35-54	3.5%	3.7%	4.6%	5.5%
55+	4.5%	6.8%	7.9%	9.0%
WORKING STATUS WITHIN GENDER				
Full time	27.9%	16.4%	25.8%	17.0%
Part time	2.6%	10.0%	2.1%	8.4%
Not working	19.3%	24.0%	15.8%	14.6%
GOR				
NORTH EAST	4.2%		4.5%	
NORTH WEST	11.6%		12.0%	
YORKSHIRE AND THE HUMBER	6.4%		8.6%	
SCOTLAND	9.3%		8.9%	
EAST MIDLANDS	8.2%		7.3%	
WEST MIDLANDS	9.2%		9.3%	
EAST	8.8%		9.1%	
WALES	5.9%		4.8%	
LONDON	11.3%		12.8%	
SOUTH EAST	15.0%		13.8%	
SOUTH WEST	9.9%		9.0%	

A small number of respondents gave answers which meant we were unable to include them in the weighting. In these cases, they were given a weight of 1 for that dimension (i.e. the weighting had no impact for them).

These were as follows:

- 19 people refused to give their age
- 27 people said they were of an other gender (than male or female) or and 6 refused to state their gender
- 10 people did not know their working status, and 20 people refused to say

Following the weighting process, we were left with an effective base size of 3,648 (91.2% of the interviewed sample).

3.2 Statistical significance

When using the survey results it is important to remember that not all differences are statistically significant. The respondents who took part in the survey are only a sample of the total "population", so we cannot be certain that the figures obtained are exactly those that would have been reached if everyone had taken part (the "true" values).

For survey results based on a random probability sampling approach, we can predict the variation between the sample results and the "true" values using the sample size and the result for each question. The confidence with which we can make this prediction is 95% - that is, the chances are 95 in 100 that the "true" value will fall within a specified range (the confidence interval). We can also test whether the difference between the results of two separate groups (e.g. the 2016 and 2014 surveys) are statistically significant. To be statistically significant, the difference must be greater than the 95% confidence interval.

Had the survey been based on a simple random sample we would have considered a difference of two percentage points or more to be significant at the $p < 0.05$ level (with slight variation according to the size of the proportions). However, as the all waves of the survey have been conducted using a random location quota sample, rather than a random probability sample, statistical differences are presented (both in the main report and on the accompanying data tables) on an indicative basis only.

3.3 Key definitions

Some of the key terminology used throughout both the written and technical reports is listed below:

- P12M engaged – switched supplier, tariff, or compared in the past 12 months
- P12M unengaged – none of the above actions in the past 12 months
- Ever switched – have ever switched supplier
- Never switched – have never switched supplier
- P12M switchers – switched supplier or tariff in past 12 months
- P12M supplier switchers – switched supplier in the last year
- P12M tariff switchers – switched tariff in the last year
- P12m comparers – compared supplier / tariff in the last year (but not switched)

3.4 Calculating overall results

The survey contains different versions of certain questions in order to capture differences between gas consumers, electricity consumers, those who use both, and those on a dual fuel tariff. Some variables in the tables and SPSS are therefore based on two measures, one asked of gas consumers (either

gas only or gas and electricity consumers) and one asked of electricity consumers (electricity only, or gas and electricity consumers). For these variables, results were calculated by averaging data across the two questions, to provide a single overall figure.

Where separate dual supply, gas and electricity questions were asked, results were calculated by averaging data across the three questions. The same approach was taken in 2016.

Results were based on the proportion of consumers or the proportion of actions as appropriate.

Example of average result based on proportion of consumers – switching supplier in the last 12 months (variable Q138_ Q139 in the tables):

When calculating the proportion of consumers who have switched supplier in the last 12 months, there were two separate gas and electricity questions:

- Q138, whether switched electricity in the last 12 months, asked of all respondents who have an electricity supply (and are responsible for it) and had switched at least once at Q21;
- Q139, whether switched gas in the last 12 months, asked of all respondents who have a gas supply (and are responsible for it) and had switched at least once at Q22;

NB. for analysis purposes, the tables for Q138 and Q139 were rebased on **all** those who had a gas / electricity supply and are responsible for it.

Consumers who have both gas and electricity supply were asked both questions, and they are included in the 'switched' figure if they have switched gas, electricity or both in the last 12 months. The average result is calculated as the proportion of consumers who switched gas and/or electricity ('Yes' at Q138 and/or Q139 = 670) within the total number of consumers (4001). Therefore, $670/4001 \times 100 = 17\%$ of consumers switched supplier in the 2017 survey.

The below table shows metrics reported on that are calculated using the above approach.

Table 3.1 Examples of metrics which are calculated as % of consumers

Metric	Question Numbers
Any Big-Six supplier	Q3_Q151 / Q4_Q151
Payment type for gas and/or electric	Q5 / Q6
Switched supplier in the last 12 months	Q138 / Q139
Ever switched	Q21 / Q22
Changed tariff with existing supplier in the last 12 months	Q35 / Q36
Ever changed tariff with existing supplier	TmesG / TmesE
Compared tariffs with other supplier (but not switched supplier or changed tariff) in the last 12 months	ChngG / ChngE
Compared tariffs with own supplier (but not switched supplier or changed tariff) in the last 12 months	ChngG / ChngE
Active Consumers - Active in the energy market in the last 12 months either by comparing tariffs, changing their tariff with their existing energy supplier or switching supplier	Q138 / Q139 / TmesG / /TmesE / ChngG / ChngE
Changed payment method in the last 12 months	ChngG / ChngE

Example of average result based on proportion of actions/responses – how respondents rate their supplier for value for money

For the question of how consumers rate their supplier for value for money, there were three questions:

- RateS_G: 'How do you rate your current gas supplier in terms of value for money?'
- RateS_E: 'How do you rate your current electricity supplier in terms of value for money?'
- RateS_D: 'How do you rate your current energy supplier in terms of value for money?'

The aim of this question is to measure how energy suppliers in general are rated in terms of value for money, so it make sense to base the combined RateS_G / RateS_E / RateS_D variable on the number of responses (so that both responses are taken into account for respondents with different gas and electricity suppliers), rather than on the number of respondents. The number of 'good' responses recorded at these questions was 2809 out of the total number of responses across these questions (4394). Therefore, $2809/4394*100 = 64\%$ of responses (and therefore, suppliers) were rated as 'good' value for money.

The below table shows metrics reported on that are calculated using the above method

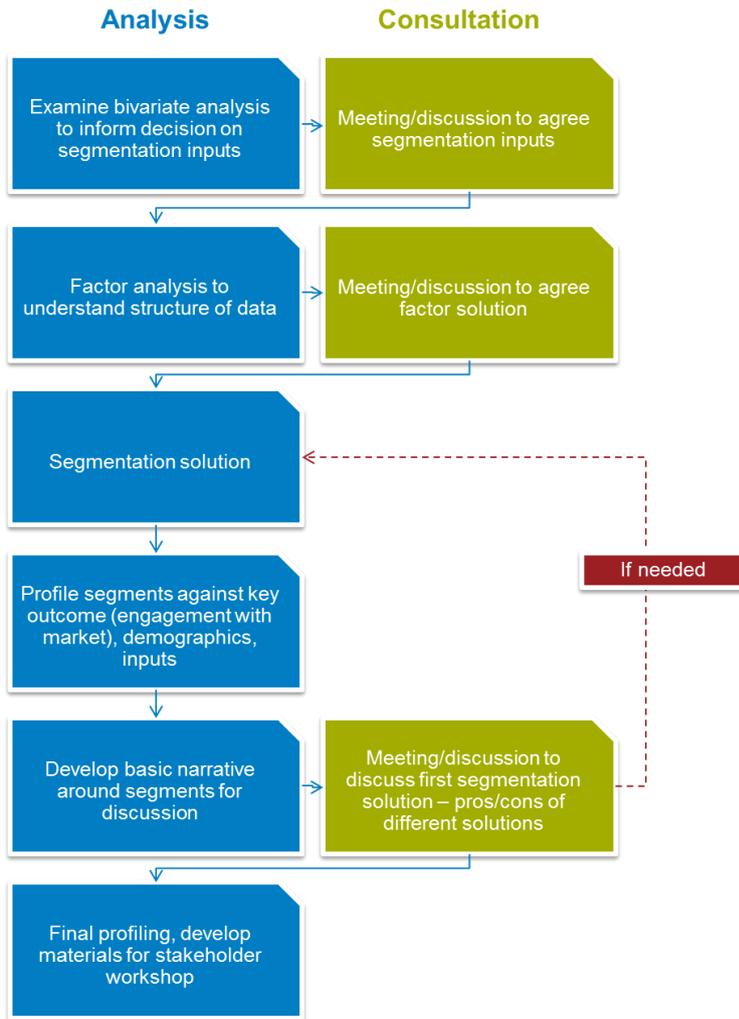
Table 3.2 Examples of metrics which are calculated as a % of responses

Metric	Question Numbers
Switched via an online price comparison service / Switched by another method	Q29 / Q34 / Q156
Confident on the best energy deal for them	Q123 / Q124 / Q125
Familiar with...the features of current tariff	Q89 / Q90 / Q153
Satisfied with overall service received from current supplier(s)	Q59 / Q63 / Q67
Trust current supplier(s) to...treat them fairly in their dealings with them	Q60_1 / Q64_1 / Q68_1
Trust current supplier(s) to...provide clear and helpful information	Q60_2 / Q64_2 / Q68_2
Trust current supplier(s) to...charge a fair price	Q60_3 / Q64_3 / Q68_3

3.5 Segmentation

The segmentation involved two main stages: a factor analysis, followed by the segmentation itself using a method of cluster analysis called K-means. Figure 3.3 outlines the overall process. The factor analysis and techniques used to arrive at the segmentation solution are outlined in the following sections.

Figure 3.1. Segmentation process



3.5.1 Factor analysis

A factor analysis was run on data from 2244 respondents, part-way through fieldwork, in order to reduce the number of variables to be fed into the segmentation, and help in interpretation. The factor analysis grouped together those variables which were intercorrelated, as measured by the coefficient of correlation. Several factor analysis solutions were run, on 31 different variables, producing a different number of factors. GfK and Ofgem agreed on an 8-factor solution which they agreed (i) included factors which were semantically intuitive and interpretable, and (ii) could explain a high proportion of the total variation within the data. Table 3.1 contains the full list of factors and inputs. The new factors are average measurements: each factor is an average of the original variables that make up that factor. From this, factor scores are calculated for respondents for each of the newly derived factors. The factors were subsequently verified using the full data set, prior to their inclusion in the segmentation analysis.



Table 3.1: Factors and their input variables

Factor	Input variables
Factor 1: Market Confidence	Conf2_2. Choosing the best energy deal for your household
	Conf2_1. Comparing the different energy deals available
	Conf2_4. Understanding your energy bill
	Conf2_3. Making a complaint to your energy supplier, if you had a reason to complain
	q145 How easy or difficult do you believe it is to compare different tariffs for electricity or gas?
Factor 2: Trust in suppliers	Q60/64/68 Treat you fairly in their dealings with you
	Q60/64/68 Charge you a fair price for your gas
	Q60/64/68 Provide clear and helpful information for you
	Q123/Q124/Q125 How confident are you that you currently have the best deal
Factor 3: Switching attitudes	q121_1 Switching is a hassle that I've not got time for
	q121_3 Switching energy suppliers takes too long
	q121_2 I worry that if I switch things will go wrong
	q121_5 It's too hard to work out whether I would save or not if I switched
Factor 4: Engaged shoppers	Empow4. I usually continue to search for an item until it reaches my expectations
	Empow1. As soon as I see a problem or challenge I start looking for possible solutions
	Empow5. When shopping for a major purchase, I don't mind spending several hours looking for it
	Empow2. I am able to follow through with things once I've made up my mind to do something
	Empow10. I always like to look for ways that I can save money, even if it is only a little
	Empow11. I always check bank or building society statements when I get them, including online
Factor 5: PCW attitudes	pcwst_2 Price comparison websites are unbiased in the way they display energy deals
	pcwst_3 Price comparison websites make clear how potential savings are calculated
	pcwst_1 Price comparison websites all have the same energy deals on them
Factor 6: Open to Innovation	Empow7. I am usually among the first to try a new product when it appears on the market
	spatt1 I would be wary of using an energy supplier I have never heard of
	Empow6. I would rather stick with a product that I currently buy than try something I'm not sure of
	q121_4 As far as I know, most of my family and friends regularly switch their energy supplier
Factor 7: Added value services	spatt2 If I was going to change energy supplier, I would look for a supplier who offered me extra rewards
	spatt3 I would be happy to pay slightly more for my energy if my supplier offered me better customer service
Factor 8: Adequate information	Empow9. When looking for new products and services, I often find the amount of information overwhelming
	q73 Range of tariffs available
	Empow3. I can't possibly know everything before making a decision

3.5.2 Segmentation analysis

The eight factors and associated factor scores for each respondent were used as inputs to the segmentation itself.

The segmentation approach that was used was a K-means method. The underlying premise of this approach is that it allocates respondents to a cluster on the basis of the Euclidean distance from the 'centre' of each cluster. In essence, each respondent is assigned to the cluster with the smallest distance between the cluster centre and that respondent. The cluster centre is defined as the average point of all the respondents in a given cluster, which is actually the mean of all the dimensions or variables across all respondents in a particular cluster.

To start the segmentation process it is necessary to identify the initial cluster centres and GfK has developed a proprietary solution to identify the optimal solution which involves a 3-step process.

- In the first step, 100 K-mean cluster solutions are developed using different starting centres.
- In the second step, a meta-segmentation is conducted of the solutions developed in step 1 to reduce the number of possible solutions to 4, using a hierarchical cluster analysis (using Ward's method).
- In the final step, each of the 4 solutions is optimized by systematically varying the cluster centres based on a variance criterion, and one solution is then selected that represents the optimal solution, again based on the variance criterion.

The K-means technique requires that you specify the number of clusters that wish to obtain so solutions ranging from the 5 to 8 cluster solutions were developed. These cluster solutions were then profiled against the variables that were used as the inputs for the segmentation (both the factors and the individual statements) as well as other key profiling variables such as engagement behaviours, demographics etc., and the 6 cluster solution was agreed upon.

3.6 Accompanying data tables and SPSS

Supporting data tables, in MS Excel, showing full socio-demographic variations are published alongside the main and technical reports. These tables include statistical significance testing at the 95% level of confidence. Each question from the 2017 survey is presented against a series of analysis crossbreaks (including standard demographics such as age and social grade, and survey-specific variables such as level of engagement, supplier type and segment). The data tables also include a set of tables showing each analysis crossbreak against the other analysis crossbreaks.

An SPSS data file is also available from Ofgem upon request. This provides respondent level data for further analysis, and includes derived variables and crossbreaks included in the main report and data tables (but excluding variables suppressed under the Utilities Act, Section 105).

A guide to using the data tables and SPSS is published alongside the data files.

3.7 Qualitative methods

Qualitative research was carried out with a range of people from the various segments, to add to the insight, and to add some depth and personal experiences to the segments. Individual in-depth interviews were conducted in participants' home, with respondents who had agreed to be re-contacted for further research at the end of the quantitative interview. With respondent permission, video footage and audio recordings were collected, and used to generate case studies for this report.

3.7.1 Qualitative approach

12 in-depth interviews were conducted in total amongst segment exemplars, whose survey responses were highly typical of the segment to which they had been allocated. Two depth interviews with segment exemplars were conducted for each of the six segments.

Each depth interview lasted an hour, and was moderated by a member of the qualitative research team at GfK. Interviews took place in the participant's home, enabling observation of the home environment and living circumstances.

A discussion guide was designed to guide the moderator's questioning, and this is appended. The topics broadly reflected the issues covered in the main survey questionnaire, However, as the main purpose of the qualitative interviews was to gain a deeper understanding of the participant's personal situation and specific experiences, the discussion guide was used flexibly to allow opportunity for the participant to guide the discussion to some extent. This enabled a degree of digression from the core questions and further exploration of relevant views or experiences that were most salient for the participant. The discussion guide also included techniques and exercises to prompt creativity and further reflection on key topics.

Video and audio recordings were made during the interviews. Consent was requested for the recordings to take place, and also for the footage, and the transcriptions of the interview recordings, to be passed to Ofgem, and potentially used in further dissemination. The moderator explained the planned use of the materials, and requested written consent. Only three of the qualitative interview participants did not provide their consent for the footage to be collected or used as specified.

3.7.2 Qualitative sample

Qualitative interviewees were selected from the quantitative sample. To ensure that respondents were good exemplars of their relevant segments, they were selected with reference to their probability of being allocated to the segment – with respondents with very high allocation probabilities (80% or higher probability of segment membership) prioritised in recruitment.

Two segment exemplars were interviewed from each segment, making a total of 12 interviews, Some additional sampling criteria were set to ensure that the segment exemplars included a variety of different demographic groups as well as varied experiences and engagement with the energy market. The additional sampling criteria set, and the sample achieved, are described in the table below. Interviews took place in Greater London, Sheffield, Nottingham, Newcastle and Birmingham.

Table 3.2 Qualitative sample

Segment	Gender	Age	Engagement action in past 12 months	Social Grade
Segment 1	Male	58	Done nothing	D
Market Sceptics	Female	49	Switched tariff	C1
Segment 2	Female	35	Switched tariff	C1
Happy Shoppers	Male	39	Compared tariff	B
Segment 3	Male	71	Switched tariff	C2
Anxious Avoiders	Female	28	Done nothing	C2
Segment 4	Female	63	Done nothing	B
Contented Conformers	Male	56	Compared tariff	E
Segment 5	Female	42	Done nothing	C1
Hassle Haters	Male	66	Switched supplier	C2

Segment	Gender	Age	Engagement action in past 12 months	Social Grade
Segment 6	Female	40	Compared tariff	C1
Savvy Searchers	Male	67	Switched supplier	C1

It is worth noting that there were some difficulties in recruiting the required sample, despite the large numbers of survey contacts available. This resulted in relaxation of the age criteria initially set, to allow inclusion of more people over the age of 55 than had been originally planned. Additional research locations were added during recruitment, to increase the pool of potential contacts. Two possible reasons for these difficulties are suggested. First, the application of quotas on switching behavior reduced the number of potential participants considerably, especially where the required behavior was less typical of the segment. Second, people in the over 55 age group were less likely to be working or have other commitments preventing them from taking part in a depth interview.

3.7.3 Qualitative Recruitment

Qualitative recruitment was carried out by GfK recruitment partner, RedBlue. Potential participants were contacted by telephone to establish their eligibility and willingness to take part. Eligibility to take part according to the demographic and behavioral quotas for the qualitative sample was established using a screening questionnaire and cross-checking consistency with answers already provided during the survey. Membership of the relevant segment, and the extent to which the potential participant represented a strong exemplar of the segment, was established using the participant's original responses to the survey, rather than during the qualitative recruitment,

During recruitment, the interview process was explained, and participants were informed about the video and audio recordings, the potential uses for the material, and that consent would be requested during the interview.

3.7.4 Qualitative analysis and reporting

Following completion of the interviews, the audio recordings were used to generate transcripts of each interview. These transcripts were used during the individual interview analysis that formed the basis for the case studies included in the main report. No overall thematic analysis was carried out on the qualitative interviews, as the number of interviews carried out in each segment was too small to enable useful comparison. Fully anonymized transcriptions and video footage were provided to Ofgem, where consent had been given for this by the research participant.

4 Annex tables

Table 4.1 Key results – 2014 vs 2015 vs 2016 vs 2017

Question N ^o	Calculation method ⁷	Question	2014	2015	2016	2017
		<i>Base all consumers unless otherwise stated (2014:6151; 2015:5934; 2016:5956)</i>	<i>Percentage</i>			
Awareness and activity in the energy market						
Q14	Simple %	Aware that consumers can switch supplier	88	90	89	86
Q14	Simple %	Aware that consumers can change tariff with existing supplier	82	85	84	77
Q14	Simple %	Aware that consumers can change payment method	80	83	85	79
Q14	Simple %	Aware of all three actions	75	79	80	72
Q14	Simple %	Aware of none of the actions/don't know	8	6	5	6
Q138/ Q139	% consumers	Switched supplier in the last 12 months	14	13	15	18
Q138/ Q139	% consumers	Switched supplier, but not in the last 12 months	53	51	48	43
Q21/ Q22	% consumers	Ever switched supplier ^{8*}	67	63	63	62
Q21/ Q22	% consumers	Never switched*	40	33	45	35
WhnSG/ WhnSE	% consumers	Changed tariff with existing supplier in the last 12 months*	16	17	17	16
ChngG/ ChngE	% consumers	Compared tariffs with other supplier (but not switched supplier or changed tariff) in the last 12 months*	7	9	9	11
ChngG/ ChngE	% consumers	Compared tariffs with own supplier (but not switched supplier or changed tariff) in the last 12 months*	7	8	7	9

⁷ Whether the metric is derived from as a simple percentage, or calculated from the proportion of consumers or the proportion of responses (as detailed in section 3.4)

⁸ Whether respondent has ever switched either gas, or electricity supplier



Question N°	Calculation method ⁷	Question	2014	2015	2016	2017
Q138/ Q139/ WhnSG/ WhnSE/ ChngG/ ChngE	% consumers	Active Consumers - Active in the energy market in the last 12 months either by comparing tariffs, changing their tariff with their existing energy supplier or switching supplier*	34	37	37	41
ChngG/ ChngE	% consumers	Changed payment method in the last 12 months*	4	4	4	6
Q94	Simple %	Recall of Annual Summary	55	59	60	59
Q94	Simple %	Recall of Bill or direct debit/ prepayment statement	69	69	70	71
Q94	Simple %	Recall of Price increase notification letter	48	29	22	40
Q94	Simple %	Recall of End of fixed term tariff notice	20	19	21	25
Consumer segments						
Derived		Market sceptics				14
Derived		Happy shoppers				20
Derived		Anxious avoiders				13
Derived		Contended conformers				20
Derived		Hassle haters				20
Derived		Savvy switchers				13
Behaviour around switching and comparing						
Q160	Simple %	Switched supplier, changed tariff or compared tariffs to save money <i>Base: Active Consumers - All those who switched supplier, changed tariff or compared tariffs in the last 12 months (2014: 2000; 2015:2034; 2016:2112; 2017: 1558)</i>	91	91	91	91

Question N°	Calculation method ⁷	Question	2014	2015	2016	2017
Q166	Simple %	Currently or expects to pay less for energy as a result of switching supplier or changing tariff <i>Base: All those who switched supplier or changed tariff with the aim of saving money⁹ (2014: 1352; 2015:1306; 2016:1424; 2017: 957)</i>	77	83	86	83
Q165	Simple %	Found out about deals offered when last compared, changed or switched via an online price comparison service <i>Base: Active Consumers - All those who switched supplier, changed tariff or compared tariffs in the last 12 months (2014: 2000; 2015:2034; 2016:2112; 2017: 1558)</i>	39	46	51	49
Q123 / Q124 / Q125	% responses	Confident on the best energy deal for them	55	48	50	56
Experiences in the energy market						
Q73	Simple %	Feel there is about the right choice of different tariffs available	45	44	48	46
Q145	Simple %	Feel it is easy to compare tariffs	37	38	43	47
Q94	Simple %	Recall receiving at least one communication (annual statement, bill or direct debit/ prepayment statement, price increase notification, end of fixed term tariff letter)	83	82	82	82
Q153 / Q89 / Q90	% responses	Familiar with...the features of current tariff	43	41	44	50
Q59 / Q63 / Q67	% responses	Satisfied with overall service received from current supplier(s)	72	75	77	77
Q60_1 / Q64_1 / Q68_1	% responses	Trust current supplier(s) to...treat them fairly in their dealings with them	62	64	66	67
Q60_2 / Q64_2 / Q68_2	% responses	Trust current supplier(s) to...provide clear and helpful information	65	64	66	66

⁹ Consumers who said 'Yes' at any of Q18, Q19, Q35, Q36, Q20 AND 'Save money' at Q160



Question N°	Calculation method ⁷	Question	2014	2015	2016	2017
Q60_3 / Q64_3 / Q68_3	% responses	Trust current supplier(s) to...charge a fair price	51	55	58	58
Q76	Simple %	Made a complaint	10	9	9	10
Q81	Simple %	Had reason to complain but didn't <i>Base: All those who hadn't complained in the last 12 months to current/previous supplier (2014: 5568; 2015: 5399; 2016:5446)</i>	3	4	3	2
Empow	Simple %	Agree that 'I always check bank or building society statements when I get them'	80	81	82	83
Energy supply and payment/account characteristics						
Q1	Simple %	Gas supply only	<1	<1	<1	<1
Q1	Simple %	Electricity supply only	10	11	12	11
Q1	Simple %	Gas and electricity supply	90	89	88	89
Q10	Simple %	On an online tariff	34	39	47	50
Q11	Simple %	On a fixed term tariff	42	38	40	50
Q11	Simple %	On a standard variable tariff or mixed arrangement	58	62	60	41
Q5 / Q6	% consumers	Pays for gas and/or electricity by direct debit*	65	71	73	73
Q5 / Q6	% consumers	Pays for gas and/or electricity by prepayment meter*	15	18	16	17
Q13	Simple %	Has an electricity (time of use) meter <i>Base: All those who have an electricity supply (2014:6130; 2015:5923; 2016:5939)</i>	12	11	12	25



Table 4.2 Key segment characteristics

	Market Sceptics	Happy Shoppers	Anxious Avoiders	Contented Conformers	Hassle Haters	Savvy Searchers
<i>Base= all consumers within segment:</i>						
	561	757	559	825	829	470
Switched supplier in the last 12 months	16	33	10	7	11	30
Switched, but not in the last 12 months	48	45	35	46	40	50
Ever switched supplier	65	80	47	52	52	81
Never switched supplier	35	18	48	43	43	17
Changed tariff in the last 12 months	14	29	6	9	11	24
Compared tariffs with those offered by other suppliers ¹⁰	25	43	13	9	17	45
Compared tariffs with those offered by existing supplier	16	28	13	11	16	32
Familiar with...the features of current tariff	38	62	40	38	58	62
Recall of Annual Summary	54	67	40	61	57	72
Recall of Bill or direct debit/prepayment statement	68	75	54	74	70	84
Recall of Price increase notification letter	40	37	36	42	42	43

¹⁰ Please note that in 2014 the comparison questions were asked of those who had not switched supplier or changed tariff in the last 12 months only, whereas in 2015 all consumers were asked these questions



	Market Sceptics	Happy Shoppers	Anxious Avoiders	Contented Conformers	Hassle Haters	Savvy Searchers
Recall of End of fixed term tariff notice	18	33	19	18	27	34
Made a complaint	21	8	7	7	7	16
% of consumers in England	81	89	87	82	84	85
% of consumers in Wales	5	6	4	7	5	7
% of consumers in Scotland	14	5	9	10	11	8
Aged 16-34	21	21	21	13	26	15
Aged 35-64	58	55	45	43	51	63
Aged 65+	21	23	33	44	23	22
Social Grade AB	25	25	17	18	19	35
Social Grade C1	34	37	28	32	31	35
Social Grade C2	21	19	23	20	23	17
Social Grade DE	21	18	32	30	27	13
Owner Occupier	61	63	55	59	54	73
Social Renter	19	19	27	25	22	11
Private Renter	19	16	17	14	22	14
English is not first/main language	6	6	11	7	11	3
Agree that 'I always like to look for ways that I can save money, even if it is only a	82	90	42	79	89	85



	Market Sceptics	Happy Shoppers	Anxious Avoiders	Contented Conformers	Hassle Haters	Savvy Searchers
little'						
Agree that 'I always check bank or building society statements when I get them'	86	92	45	92	85	86
Regular internet user (at least once a day)	83	86	59	62	74	91
On a fixed term tariff	38	64	42	40	52	62
Pays for gas and/or electricity by direct debit	69	78	68	69	72	87
Pays for gas and/or electricity by prepayment meter	20	16	18	17	19	10
Has an electricity (time of use) meter	20	23	33	20	31	21
Big Six Supplier for gas and/or electricity	80	66	82	84	80	64



In the tables that follow, significant differences are marked as follows:

- ▲▼ denote significant differences between sub-groups and the average
- ↑↓ denote significant differences over time

Table 4.2 Supplier switching levels – comparison within sub-groups over time

Group		2017		2016		2015	
		Base	%	Base	%	Base	%
All consumers		4001	18	5956	15	5934	13
Age	16-34	807	22▲↑	1147	19▲	1098	17▲
	35-64	2049	19▲↑	2679	16▲	2734	15▲
	65+	1126	12▼↑	2130	11▼↑	2102	8▼
Social Grade	AB	752	22▲↑	1171	18▲	1071	16▲
	C1	1083	20▲↑	1551	15▲	1469	14▲
	C2	806	13▼	1139	14▼	1066	12▼
	DE	1360	13▼↑	2095	12▼↑	2328	10▼
Income	Under £16K pa	859	15↑	2093	12	2406	11
	£16K+ pa	1805	21▲↑	2995	17▲↑	2735	15▲
Internet use	Frequent user	2923	21▲↑	4023	17▲	4257	16▲
	Infrequent/non-user	1043	8	1856	7↑	1677	4
How pay	Direct debit	2799	19▲↑	4238	16▲	4216	15▲
	Standard credit	339	7	515	6	603	5
	Prepayment meter	779	18▲	981	16▲	1054	13▲
Supplier	Any of the 6 large suppliers	3082	11↑	4716	9	4986	8
	With a medium/smaller supplier	919	37▲	1240	36▲	948	38▲
Country	England	3453	18▲	5057	16▲	5069	14▲



Group	2017		2016		2015	
	Base	%	Base	%	Base	%
Scotland	357	13▼	524	12	551	10
Wales	191	24▲↑	375	12	314	11

Table 4.3 Tariff changing levels – comparison within sub-groups over time

Group	2017		2016		2015	
	Base	%	Base	%	Base	%
All consumers	4001	16▲	5956	17▲	5934	17▲
Age						
16-34	807	13▼	1147	12▼	1138	14▼
35-64	2049	17▲	2679	19▲	3108	18▲
65+	1126	15	2130	17▲	1688	17▲
Social Grade						
AB	752	21▲	1171	23▲	1339	27▲
C1	1083	18▲	1551	18▲	1889	18▲
C2	806	12▼	1139	15▲	1236	15▲
DE	1360	11▼	2095	11▼	1470	9▼
Income						
Under £16K pa	859	14▲	2093	11	1896	10
£16K+ pa	1805	18▲	2995	20	3278	22▲
Internet use						
Frequent user	2923	18▲	4023	19▲	4642	20▲
Infrequent/non-user	1043	10	686	12↑	1292	8
How pay						
Direct debit	2799	18▲	4135	21▲	4216	22▲
Standard credit	339	7▼	606	9▲	603	9▲
Prepayment meter	779	9▼↑	1087	5▼	1054	6▼
Supplier						
Any of the 6 large suppliers	3082	14	4716	16	4986	17
With a	919	21▲	1240	18	948	19



Group		2017		2016		2015	
		Base	%	Base	%	Base	%
medium/smaller supplier							
Country	England	3453	16▲	5057	17	5069	18▲
	Scotland	357	12▼	524	17↑	551	16
	Wales	191	15	375	15	314	12

Table 4.4 Other supplier comparison levels – comparison within sub-groups over time

Group		2017		2016		2015	
		Base	%	Base	%	Base	%
All consumers		4001	25▲	5956	26▲	5934	26▲
Age	16-34	807	25▲	1147	25▲	1138	25▲
	35-64	2049	28▲	2679	30▲	3108	29▲
	65+	1126	20▼	2130	21▼	1688	21▼
Social Grade	AB	752	36▲	1171	36▲	1339	37▲
	C1	1083	29▲	1551	28▲	1889	29▲
	C2	806	17▼	1139	24▲	1236	23▲
	DE	1360	15▼	2095	16▼	1470	16▼
Income	Under £16K pa	859	20	2093	17	1896	17
	£16K+ pa	1805	31▲	2995	32▲	3278	32▲
Internet use	Frequent user	2923	29▲	4023	31▲	4642	31▲
	Infrequent/non-user	1043	14	686	11	1292	10
How pay	Direct debit	2799	29▲	4135	31▲	4216	31▲
	Standard credit	339	13▼	606	15▼	603	14▼
	Prepayment meter	779	15▼	1087	15▼	1054	16▼
Supplier	Any of the 6 large	3082	20	4716	24	4986	23



Group		2017		2016		2015	
		Base	%	Base	%	Base	%
suppliers							
With a medium/smaller supplier		919	41▲↑	1240	34▲	948	41▲
Country	England	3453	26▲	5057	27	5069	27▲
	Scotland	357	17▼	524	24↑	551	24↑
	Wales	191	27▲	375	23	314	20

Chart 1 Profile of the CMA database group

Below we profile those in the CMA database group (who have not switched supplier or tariff in the past 4 years) against those not in the CMA database group (including P12M supplier or tariff switchers, and those who switched in the past 1-3 years)

		CMA database group (1,990)	Non CMA Group (2,011)
Age	16-34	21%▲	19%▼
	35-64	47%▼	57%▲
	65+	32%▲	25%▼
Social grade	ABC1	48%▼	63%▲
	C2DE	53%▲	37%▼
Annual household income	Below £16,000	22%▲	17%▼
	Above £16,000	40%▼	56%▲
Internet use	Daily internet user	67%▼	83%▲
	Uses internet (less frequently)	12%	10%



		CMA database group (1,990)	Non CMA Group (2,011)
	Non-user	20%▲	7%▼
Bill type	Direct Debit	65%▼	81%▲
	Standard Credit	12%▲	5%▼
	PPM	21%▲	13%▼
Tariff type	Fixed term	31%▼	63%▲
	Variable tariff	52%▲	27%▼
	Mixed	2%	3%
Whether has smart meter	Yes	6%▼	11%▲
	No	94%▲	89%▼



5 Questionnaire and filters

5.1 Changes and additions made to questionnaire between 2016 and 2017

Type/ description	Question number	Question name	2016	2017
Amendment/ change to question wording	<i>Intro1</i>	<i>Intro1</i>	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	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. To start with, a few questions to make sure we are speaking with the right people
Addition/ new question	<i>Intro1a</i>	<i>Intro2</i>		Before we start to speak about energy, I would like to ask a few questions about you. The first few questions are about whether and how you like to shop around for major service providers or for major purchases - not just for energy



Type/ description	Question number	Question name	2016	2017
Addition/ new question	<i>New1</i>	<i>Empow</i>		<p>To what extent do you agree or disagree with these things?</p> <ul style="list-style-type: none"> i. As soon as I see a problem or challenge I start looking for possible solutions ii. I am able to follow through with things once I've made up my mind to do something iii. I can't possibly know everything before making a decision iv. I usually continue to search for an item until it reaches my expectations v. When shopping for a major purchase, I don't mind spending several hours looking for it vi. I would rather stick with a product that I currently buy than try something I'm not sure of vii. I am usually among the first to try a new product when it appears on the market viii. I will give in if a negotiation is not going my way ix. When looking for new products and services, I often find the amount of information overwhelming x. I always like to look for ways that I can save money, even if it is only a little xi. I always check bank or building society statements when I get them, including online
Amendment/ change to answer codes	Q3	Q3	Old supplier list	New supplier list
Amendment/ change to answer codes	Q4	Q4	Old supplier list	New supplier list
Amendment/ change to answer codes	Q151	Q151	Old supplier list	New supplier list
Amendment/ change to answer codes	Q5 (code 7)	Q5 (code 7)	Payment card \ book where you can pay money in whenever you choose (ad hoc)	Payment book/card where you can pay money in whenever you choose (ad hoc). Payments you make are automatically deducted from your next bill

Type/ description	Question number	Question name	2016	2017
Amendment/ change to answer codes	Q6 (code 7)	Q6 (code 7)	Payment card \ book where you can pay money in whenever you choose (ad hoc)	Payment book/card where you can pay money in whenever you choose (ad hoc). Payments you make are automatically deducted from your next bill
Addition/ new question	New4	PayTy		Can I just check, do you <pay a single direct debit/receive a single bill> for your gas and electricity supply, or <do two direct debits come out of your account/are they billed separately>?
Amendment/ change to question wording	Q8	Q8	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 across the whole year, including the winter. INTERVIEWER INSTRUCTION: The next question will ask you to record the timescale (i.e. per year, month or week)	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 across the whole year, including the winter. If you're not sure, you can just give me an approximate value. INTERVIEWER INSTRUCTION: The next question will ask you to record the timescale (i.e. per year, month or week) and whether this is the actual amount or an approximation.
Addition/ new question	New5	Apprx		And can I check, is that the actual amount you pay or an approximation?
Amendment/ change to question wording	Q153/ 89/90	Q153 / 89 / 90	How familiar would you say you are with the features of your current dual fuel / gas / 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	How familiar would you say you are with the features of your current energy / gas / 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
Amendment/ change to question wording	Q10	Q10	An energy tariff is the pricing plan for the <?> that you use. Are you on an online tariff, that is <?> account that you manage over the internet?	Do you primarily manage your <gas/ electricity/ gas and electricity> account online or via an app?



Type/ description	Question number	Question name	2016	2017
Amendment/ change to question wording	Q11	Q11	A fixed term tariff is a tariff that has a definite end date. Are you on a fixed term tariff for <?>?	A fixed term tariff is a tariff that has a definite end date. Are you on a fixed term tariff for <gas / electricity / gas and electricity>? IF NECESSARY: These tariffs often state the length in their name, such as a 12 months fix, or a March 2018 fix
Amendment/ change to question wording	Q13	Q13	Do you have an electricity meter that charges different amounts at different times of the day?	Do you pay different amounts for your energy depending on when you use it. For example, energy costs you less at night-time or you get free energy at the weekend?
Addition/ new question	SM1	SM1		Smart meters monitor energy consumption in the home. Before today had you heard of smart meters?
Addition/ new question	SM2	SM2		Which of the statements below do you think most accurately describes who can install a smart meter?
Addition/ new question	SM3	SM3		And which, if any, of the following statements about smart meters do you believe to be true? You can select more than one statement
Addition/ new question	SM4	SM4		Do you have a smart meter?
Addition/ new question	SM6	SM6		As a result of getting a smart meter, to what extent do you do the following things? Please only think about what you've done since you've received a smart meter, compared to what you did before you had a smart meter. Since receiving a smart meter, to what extent... 1. Do you use less energy 2. Do you use certain appliances or devices less often 3. Have you stopped using certain appliances or devices 4. Do you turn off the lights more 5. Do you keep the thermostat at a lower temperature"



Type/ description	Question number	Question name	2016	2017
Amendment/ change to question wording	Q21	Q21	How many times have you ever switched your gas supplier? 1 Once 2 Twice 3 Three times 4 Four times or more	How many times, if at all, have you ever switched your gas supplier? 1: Once 2: Twice 3: Three times 4: Four times or more 5: Don't know how many times, but I definitely have switched gas supplier before 6: Have never switched gas supplier
Amendment/ change to question wording	Q138	Q138	When did you last do this? 1. Between 1 and 2 years ago 3. Between 2 and 5 years ago 4. Between 5 and 9 years ago 5. 10 or more years ago	When did you last switch gas supplier? 1. In the last 12 months 2. Between 1 and 2 years ago 3. Between 2 and 3 years ago 4. Between 3 and 4 years ago 5. Between 4 and 5 years ago 6. Between 5 and 9 years ago 7. 10 or more years ago
Amendment/ change to question wording	Q22	Q22	How many times have you ever switched your electricity supplier? 1 Once 2 Twice 3 Three times 4 Four times or more	How many times, if at all, have you ever switched your electricity supplier? 1: Once 2: Twice 3: Three times 4: Four times or more 5. Don't know how many times, but I definitely have switched gas supplier before 6: Have never switched electricity supplier
Amendment/ change to question wording	Q139	Q139	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	When did you last switch electricity supplier? 1. In the last 12 months 2. Between 1 and 2 years ago 3. Between 2 and 3 years ago 4. Between 3 and 4 years ago 5. Between 4 and 5 years ago 6. Between 5 and 9 years ago 7. 10 or more years ago

Type/ description	Question number	Question name	2016	2017
Amendment/ change to question wording	Q154	Q154	Thinking about the last time you switched an energy supplier, did you switch both gas and electricity at the same time? 1. Yes 2. No	Thinking about the last time you switched an energy supplier, which of these did you do? The last time I switched, I switched... 1: ... gas supplier only 2: ...electricity supplier only 3: ... gas and electricity suppliers at the same time
Addition/ new question	New30	TmesG		How many times if at all, have you ever switched your gas tariff? By this we mean, staying with the same gas supplier, but changing your deal e.g. moving from the supplier's variable rate to a fixed rate? Please don't think here about times when you have switched supplier, but just about when you switched tariff
Addition/ new question	New31	WhnSG		When did you last switch gas tariff?
Addition/ new question	New22	TmesE		How many times if at all, have you ever switched your electricity tariff? By this we mean, staying with the same electricity supplier, but changing your deal e.g. moving from the supplier's variable rate to a fixed rate? Please don't think here about times when you have switched supplier, but just about when you switched tariff
Addition/ new question	New23	WhnSE		When did you last switch electricity tariff?
Addition/ new question	New24	Switch		Thinking about the last time you switched an energy tariff which of these did you do? The last time I switched, I switched... 1: ... gas tariff only 2: ... electricity tariff only 3: ... gas and electricity tariffs at the same time



Type/ description	Question number	Question name	2016	2017
Addition/ new question	New14	ChngG		Thinking about your gas supply, which if any of these have you done in the past 12 months? 1. Changed payment method 2. Compared my gas tariff with those offered by other gas suppliers 3. Compared my gas tariff with those offered by my own supplier
Addition/ new question	New13	ChngE		Thinking about your electricity supply, which if any of these have you done in the past 12 months? 1. Changed payment method 2. Compared my electricity tariff with those offered by other electricity suppliers 3. Compared my electricity tariff with those offered by my own supplier
Addition				In previous surveys, respondents were asked separately about each tariff or supplier switch. For 2017, the decision was taken to only ask about one experience, to improve data quality (and reflecting the fact that most people now have a single supplier for both fuels, and tariff or supplier switches tend to happen for both at the same time). A priority was set up to select which to focus on through the remainder of the interview, as follows: A. Supplier switch B. Tariff switch C. Comparisons of tariffs or suppliers The definitions for the priorities are detailed below.



Type/ description	Question number	Question name	2016	2017
Addition/ new dummy variable	New15	Dummset		<p>Dummy variable to determine whether switched, changed tariff or compared tariffs; where multiple responses given, this variable provides a hierarchy of choice for the CAI script:</p> <p>1 (switched gas supplier) = q138=1 AND NOT q154=3 2 (switched electricity supplier) = q139=1 AND NOT q154=3 3 (switched gas and electricity suppliers together) = q154=3 4 (switched gas tariff) = WhnSG=1 AND NOT switch=3 5 (switched electricity tariff) = WhnSE=1 AND NOT switch=3 6 (switched gas and electricity tariff together) = switch=3 7 (compared gas suppliers) = ChngG = 2 8 (compared gas tariffs offered by your own supplier) = ChngG=3 9 (compared electricity suppliers) = ChngE=2 10 (compared electricity tariffs offered by your own supplier) = ChngE=3 96 None of the above</p> <p>SET PRIORITY OF WHICH RECENT EXPERIENCE TO ASK ABOUT IF MULTIPLE CODED, IS SET AS SHOWN ABOVE, and text substitution is shown below: A Switched supplier (1 OR 2 OR 3) B Switched tariff (4 OR 5 OR 6) C Compared (7 OR 8 OR 9 OR 10)</p>
Amendment/ change to question wording	Q160	Q160	<p>Thinking of the last time you switched or compared <?> supplier or tariffs, what were the main things you wanted to achieve? INTERVIEWER INSTRUCTION: Multi code up to 3 responses 1 Save money 2 Get better customer service</p>	<p>Thinking of the last time you <answer from Dumm1> , what were your priorities? IF 'Saving money' PROBE TO PRECODES PROBE: What other things were your priorities?</p>



Type/ description	Question number	Question name	2016	2017
			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	CODE UP TO 3 RESPONSES 1: Saving money/paying less than before 2. Avoiding price rise 3: Get better customer service 4: Wanted a 'greener' tariff 5: Wanted a fixed term \ fixed price deal 6: Wanted a dual fuel package 7: Wanted an online tariff 8. Wanted to bundle with other services (e.g. energy and broadband or telephone combined) 9: Get other benefits (e.g. loyalty points) 10: The reputation of the supplier 11: Getting a smart meter \ in home display 12: Home energy related incentives (e.g. boiler maintenance, home insulation) 13: Preference for Big 6 (British Gas, Scottish Power, SSE, Eon, NPower, EDF) 14: Preference to avoid the Big 6 (British Gas, Scottish Power, SSE, Eon, NPower, EDF) 15: A supplier I know 16. To avoid the hassle of switching 97: Other - please type in



Type/ description	Question number	Question name	2016	2017
Addition/ new question	New16	MainP		<p>And which of these was your main priority the last time you <answer from Dumm1>? Was it...</p> <p>READ OUT</p> <p>1: Saving money/paying less than before 2: Avoiding price rise 3: Get better customer service 4: Wanted a 'greener' tariff 5: Wanted a fixed term \ fixed price deal 6: Wanted a dual fuel package 7: Wanted an online tariff 8. Wanted to bundle with other services (e.g. energy and broadband or telephone combined) 9: Get other benefits (e.g. loyalty points) 10: The reputation of the supplier 11: Getting a smart meter \ in home display 12: Home energy related incentives (e.g. boiler maintenance, home insulation) 13: Preference for Big 6 (British Gas, Scottish Power, SSE, Eon, NPower, EDF) 14: Preference to avoid the Big 6 (British Gas, Scottish Power, SSE, Eon, NPower, EDF) 15: A supplier I know 16. To avoid the hassle of switching 97: Other - please type in</p>

Type/ description	Question number	Question name	2016	2017
Amendment/ change to question wording	Q161	Q161	<p>And what were the main reasons that caused you to do this? INTERVIEWER INSTRUCTION: Multi code up to 3 responses</p> <p>1 I received a bill or direct debit \ prepayment statement from my supplier</p> <p>2 I received a price increase notice from my supplier</p> <p>3 I received an end of fixed term tariff notice from my supplier</p> <p>4 I received an annual summary or review from my supplier</p> <p>5 I received a 'dead notice' from my supplier about my tariff</p> <p>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</p> <p>7 I received another communication from my supplier</p> <p>8 I experienced poor customer service</p> <p>9 I moved home</p> <p>10 I heard my energy supplier's prices were going up</p> <p>11 Media coverage about energy suppliers in general</p> <p>12 I was looking at a money saving website</p> <p>13 I saw an advert on TV article in the newspaper</p> <p>15 I saw an advert</p> <p>16 Advert other</p> <p>17 Talked to a friend, family member, or neighbour</p> <p>18 I saw an advert online</p> <p>19 I saw someone post something on social media (Facebook, Instagram, twitter etc.)</p> <p>97 Other</p>	<p>New codes are shown in bold</p> <p>And thinking about the last time you <answer from Dumm1>, what were the main reasons that caused you to do that?</p> <p>IF NECESSARY: Was it something that happened that made you start to think about it, or was there something that you saw or heard or read?</p> <p>INTERVIEWER INSTRUCTION: Multiple code up to 3 responses</p> <p>1 I received a bill or direct debit \ prepayment statement from my supplier</p> <p>2 I received a price increase notice from my supplier</p> <p>3 I received an end of fixed term tariff notice from my supplier</p> <p>4 I received an annual summary or review from my supplier</p> <p>5 I received information about my energy consumption from my supplier</p> <p>6 I received a 'dead notice' from my supplier about my tariff</p> <p>7 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</p> <p>8 I received another communication from my supplier</p> <p>9. I received a communication from another supplier</p> <p>10 I experienced poor customer service</p> <p>11 I moved home</p> <p>12 I heard my energy supplier's prices were going up</p> <p>13 Media coverage about energy suppliers in general</p> <p>14 I was looking at a money saving website</p>



Type/ description	Question number	Question name	2016	2017
				<p>15 I saw a TV advert/programme</p> <p>16 I heard a radio advert/programme</p> <p>17 I saw an ad/article in a newspaper/magazine</p> <p>18 I saw someone post something on social media (Facebook, Instagram, Twitter, etc.)</p> <p>19 I saw an advert/article online</p> <p>20 Other advertising</p> <p>21 Talked to a friend, family member, or neighbour</p> <p>97: Other - please type in</p>
Amendment/ change to answer codes	Q165	Q165		New code added "Using an automated switching service (e.g. Flipper, Voltz, Swuto, Energy Scanner)"
Addition/ new question	New9	Deals		<p>You mentioned that you found out about the deals offered when you last <answer from Dumm1> using an online price comparison service.</p> <p>How many online price comparison sites did you visit?</p>
Addition/ new question	New9a	NotSh		<p>Are there any particular reasons why you have not <shopped around to see if there are any better energy deals /switched tariff or switched supplier>?</p> <p>CHOOSE ALL THAT APPLY. CODE FIRST MENTION THEN OTHER MENTIONS</p> <p>INTERVIEWER: IF RESPONDENT SAYS "HAPPY WITH/LIKE CURRENT SUPPLIER" THEN PROBE WHAT DO YOU LIKE ABOUT YOUR EXISTING SUPPLIER?</p>



Type/ description	Question number	Question name	2016	2017
Addition/ new question	New25	Recom		Apart from salespeople working for energy companies, has anyone made any of these recommendations to you in the last 12 months? This could be a friend, family member, someone you know on social media, or another organisation.
Addition/ new question	New26	Whoma		Who made those recommendations?
Addition/ new question	New33	SwitTa		Can I just check, the last time you <answer from Dumm1>, which of these best describes what you did? 1. Switched from a variable tariff to a fixed term tariff 2. Switched from a variable tariff to another variable tariff 3. Switched from a fixed term tariff to a variable tariff 4. Switched from a fixed term tariff to another fixed term tariff"
Amendment/ change to answer codes	Q156	Q156		New code added: Using an automated switching service (e.g. Flipper, Voltz, Swuto, Energy Scanner)
Addition/ new question	New10	PCWSw		Did you actually complete the switch through the online price comparison service, or did you find out information from them and then complete the switch in some other way (e.g. calling the supplier you wanted to switch to)?
Addition/ new question	New11	HelpS		Did anyone who doesn't live with you go through or help you through the switching process on your behalf? If so, who?
Amendment/ change to question wording	Q157	Q157	Thinking of the last time you switched your energy supplier, how much do you agree or disagree with the statement?	Thinking of the last time you <answer from Dumm1>, how much do you agree or disagree with the statement?



Type/ description	Question number	Question name	2016	2017
Amendment/ change to question wording	Q166	Q166	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 <?> tariff or supplier?	To the best of your knowledge, do you feel that you are now paying less than you would have if you had not <answer from Dumm1>?
Addition/ new question	New	MoreP		If you hadn't <INSERT answer from Dumm1> how much more do you think you would be paying now for your <gas/electricity/energy>? You can answer per year, per month or per week, but this should be on average across the whole year, including the winter. If you're not sure, you can just give me an approximate value. INTERVIEWER INSTRUCTION: The next question will ask you to record the timescale (i.e. per year, month or week) and whether this is the actual amount or an approximation.
Addition/ new question	New	Freqc		Interviewer code, is that... 1: Weekly 2: Fortnightly 3: Every four weeks 4: A calendar month 5: Quarterly 6: Twice yearly 7: Annual
Addition/ new question	New	Apprx2		And can I check, is that the actual amount or an approximation?
Addition/ new question	NewA	OwedM		When you last <answer from Dumm1>, were you owed money by your old supplier(s)? This may have been because you had a positive credit balance with the old supplier(s)
Addition/ new question	NewB	MonRe		And how satisfied or dissatisfied were you with how quickly the money was returned to you by your old supplier(s)



Type/ description	Question number	Question name	2016	2017
Amendment/ change to question wording	Q122	Q122	What factors matter most to you when choosing your energy supplier or tariff? INTERVIEWER INSTRUCTION: Multi code up to 3 responses	<p>If you were to switch supplier or tariff, what would be your priorities when choosing a new deal?</p> <p>IF 'Saving money' PROBE TO PRECODES PROBE: What other priorities would you have? CODE UP TO 3 RESPONSES</p> <p>1: Saving money/ paying less than before 2: Avoiding price rise 3: Customer service 4: Having a greener tariff 5: Having a fixed term/fixed price tariff 6: Having a dual fuel package 7: Having an online tariff 16: Wanted to bundle with other services (e.g. energy and broadband or telephone combined) 8: Getting other benefits (e.g. loyalty points) 9: The reputation of the supplier 10: Getting a smart meter \ in home display 11: Home energy related incentives (e.g. boiler maintenance, home insulation) 12: Preference for Big 6 (British Gas, Scottish Power, SSE, Eon, NPower, EDF) 13: Preference to avoid the Big 6 (British Gas, Scottish Power, SSE, Eon, NPower, EDF) 14: A supplier I know 16: To avoid the hassle of switching 97: Other - SPECIFY</p>
Addition/ new question	New28	PrioM		And which of these would be your main priority? Would it be...
Addition/ new question	New17	Tried		Can I just check, in the past 12 months have you tried to switch gas or electricity supplier but have been unable to for some reason? Please don't think about changing tariff with the same supplier, we are only interested in times when you have tried to change supplier
Addition/ new question	New18	Descr		Which, if any of these describe what happened?

Type/ description	Question number	Question name	2016	2017
Addition/ new question	New19	PCWSt		To what extent do you agree or disagree with these things about price comparison websites? i. Price comparison websites all have the same energy deals on them ii. Price comparison websites are unbiased in the way they display energy deals iii. Price comparison websites make clear how potential savings are calculated
Amendment/ change to question wording	Q121	Q121	To what extent do you agree or disagree with the following statements about energy suppliers" (7 statements) 1. It's too hard to work out whether I would save or not if I switched 2. There are no real differences between suppliers in the prices they charge 3. Switching is a hassle that I've not got time for 4. I worry that if I switch things will go wrong 5. I don't think I'd be able to switch even if I wanted to 6. Some energy suppliers are more trustworthy than others 7. Changing tariff with your existing supplier is a good way to save money	How much do you agree or disagree...? i) Switching is a hassle that I've not got time for ii) I worry that if I switch things will go wrong iv) Switching energy suppliers takes too long v) As far as I know, most of my family and friends regularly switch their energy supplier vi) It's too hard to work out whether I would save or not if I switched"
Amendment/ change to list of statements	Q121	Q121	2016 statements: i) It's too hard to work out whether I would save or not if I switched ii) There are no real differences between suppliers in the prices they charge iii) Switching is a hassle that I've not got time for iv) I worry that if I switch things will go wrong	Change to code list, with some deletions/additions. 2017 statements: To what extent do you agree or disagree with the following statements about energy suppliers? i) Switching is a hassle that I've not got time for ii) I worry that if I switch things will go wrong iv) Switching energy suppliers takes too long v) As far as I know, most of my family and friends regularly switch their energy supplier



Type/ description	Question number	Question name	2016	2017
			<p>v) I don't think I'd be able to switch even if I wanted to</p> <p>vi) Some energy suppliers are more trustworthy than others</p> <p>vii) Changing tariff with your existing supplier is a good way to save money</p>	<p>vi) It's too hard to work out whether I would save or not if I switched</p>
Addition/ new question	<i>New7</i>	<i>Risks</i>		<p>What, if anything, do you think might be the risks associated with switching energy suppliers? CODE ALL MENTIONED: PROBE: What other risks can you think of?</p>
Addition/ new question	<i>New8</i>	<i>LongS</i>		<p>If someone was to switch to a new energy supplier, how long do you think the process takes from the time that they ask to switch, to the time that the new supplier starts to supply their energy? You can answer in days or weeks</p>
Addition/ new question	<i>New2</i>	<i>Conf2</i>		<p>How confident or unconfident do you feel about doing these things related to energy suppliers?</p> <ul style="list-style-type: none"> i. Comparing the different energy deals available ii. Choosing the best energy deal for your household iii. Making a complaint to your energy supplier, if you had a reason to complain iv. Understanding your energy bill
Addition/ new question	<i>New</i>	<i>SpAtt</i>		<p>To what extent do you agree or disagree with these statements about energy suppliers</p> <ul style="list-style-type: none"> ii. I would be wary of using an energy supplier I have never heard of iii. If I was going to change energy supplier, I would look for a supplier who offered me extra rewards



Type/ description	Question number	Question name	2016	2017
				iv. I would be happy to pay slightly more for my energy if my supplier offered me better customer service
Addition/ new question	New	RateS_G		How do you rate your current gas supplier in terms of value for money?
Addition/ new question	New	RateS_E		How do you rate your current electricity supplier in terms of value for money?
Addition/ new question	New	RateS_D		How do you rate your current energy supplier in terms of value for money?
Addition/ new question	New	NotCM		Why did you not make a complaint at that time
Addition/ new question	New20	Repre		In the last 12 months has a representative of your supplier or another energy supplier attempted to sell you a new energy deal in any of these ways?
Addition/ new question	New21	Words		Thinking about the last time <SUBSTITUTE IN BASED ON REPRE> by <your energy supplier/another energy supplier>, which, if any, of these words or phrases describe the <call/salesperson>?
Amendment/ change to answer codes	Q94	Q94	<p>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.</p> <p>An annual summary or review (containing details about your own energy tariff and energy use)</p> <p>At least one bill or direct debit \ repayment statement</p> <p>A price increase notification letter</p> <p>INTERVIEWER INSTRUCTION: Price Increase Notification letters exclude letters regarding price reductions but include letters regarding any other changes to a consumer's tariff price.</p> <p>A letter informing you your fixed term tariff is coming to an end</p>	<p>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.</p> <p>i) An annual summary or review (containing details about your own energy tariff and energy use)</p> <p>ii) At least one bill or direct debit \ repayment statement</p> <p>iii) A price increase notification letter</p> <p>iv) A letter informing you your fixed term tariff is coming to an end</p> <p>INTERVIEWER INSTRUCTION: Price Increase Notification letters exclude letters regarding price reductions but include letters regarding any other changes to a consumer's tariff price.</p>



Type/ description	Question number	Question name	2016	2017
Amendment/ change to question wording	Q120	Q120	<p>For which, if any, of the following services have you switched your provider in the last 12 months?</p> <ol style="list-style-type: none"> 1 Landline phone calls 2 Mobile phone network 3 Internet or broadband provider 4 Cash ISA 5 Balance transfer on a credit card 6 Current account 	<p>For which, if any, of the following services have you switched your provider in the last 12 months? For each of :</p> <ol style="list-style-type: none"> i: Mobile phone network ii: Internet or broadband provider iii: Current Account iv. Home insurance v. Car insurance <ol style="list-style-type: none"> 1. Yes I've switched 2. No I haven't 3. Not applicable because I don't have this product
Addition/ new question	New	Onlin		<p>Which of the following do you personally own?</p> <ol style="list-style-type: none"> 1. Mobile phone (capable of making calls and sending messages, but with no or limited access to internet or email) 2. Smartphone (can download apps and games via the internet, typically has a touchscreen) 3. Tablet 4. Laptop 5. Desktop PC 6. None of the above



Type/ description	Question number	Question name	2016	2017
Amendment/ change to answer codes	Q130	Q130		Codes reordered as: 3: Professional qualifications 1: Post graduate degree (MA, MSc, PhD etc.) 2: Degree 4: HND\HNC 7: ONC\OND\City & Guilds 8: GNVQ 5: A Levels\AS Levels 6: GCSE\O Levels\CSE 96: None 98: Refused 99: Don't know
Amendment/ change to answer codes	Q131	Q131	Code 3: No	Code 3: No, no-one
Addition/ new question		<i>Disa</i>		Which of these best describes your / your spouse / partner's impairment, illness or disability? 1. Visual impairment 2. Other difficulties reading, speaking or understanding English 3. Hearing impairment 4. Mobility impairment 5. Mental health problems 6. Learning difficulties 97. Other health problem or disability 96. None of these 99. Don't know 98. Prefer not to answer
Addition/ new question		<i>Welbi</i>		Which one of the following statements best describes how well you are keeping up with your bills and credit commitments at the moment? 1. I am / we are keeping up with all bills and commitments without any difficulties

Type/ description	Question number	Question name	2016	2017
				2. I am / we are keeping up with all bills and commitments, but it is a struggle from time to time 3. I am / we are keeping up with all bills and commitments, but it is a constant struggle 4. I am / we are falling behind with some bills or credit commitments 5. I am / we are having real financial problems and have fallen behind with many bills or credit commitments 6. I / we don't have any bills or credit commitments 99. Don't know 98. Refused
Addition/ new question		Arrea		In the last twelve months, has the household been in arrears on your gas or electricity bills. 1 Yes, once 2 Yes, twice or more 3 No 98: Refused 99: Don't know

5.2 – Deletions made to questionnaire between 2016 – 2017

Question number	Question
Q.7	Q.7 Do you receive a dual fuel discount for buying your gas and electricity from the same energy supplier?
Q.86	Q.86 How familiar would you say you are with the range of different energy tariffs available to you from energy suppliers in general?
Q.152/ 87/ 88	How familiar would you say you are with the range of different tariffs available to you from your current energy /gas /electricity supplier?
Q17	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.
Q.137	Interviewer code, was that...
Q.155	And before you switched, did the same energy supplier (i.e. a single supplier) provide your gas and electricity?
Q. 158/ 25/ 30	And who was your previous energy / gas / electricity supplier?
Q.26/ 31	In the last 12 months, have you changed the payment method with your gas/ electricity supplier?



Q. 72/ 32	How did you previously pay for your gas/ electricity?
Q.35/ 36	In the last 12 months, did <?> change the tariff you were on with your existing gas/ electricity supplier (without switching supplier)?
Q.37/ 39	Have you ever changed your tariff with an existing gas/ electricity supplier?
Q.41/ 42	In the last 12 months, did you compare the gas/ electricity tariff you were on with those offered by other suppliers?
Q.43/ 44	In the last 12 months, did you compare the gas/ electricity tariff you were on with any others available with your existing supplier?
Q.159	The last time you switched or compared tariff or supplier, was this regarding just gas, just electricity or both gas and electricity at the same time?
Q.162	
Q.163	And how did you find out more about your existing tariff or energy use?
Q.164	And thinking about the information that you wanted about your existing <?> tariff or energy use, how easy or difficult was it...?
Q.58	What have you heard about energy suppliers and the energy market in the last 12 months?
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?
Q.71	In the last 12 months, have you seen any information from your energy supplier about their requirement to treat customers fairly?
Q.167	And where did you see this information?
Q.146	Why do you say that?
Q.74	And would you say it is easier or harder to compare energy tariffs than a year ago?
Q.75	Why do you say that?
Q.79	Which energy company did you most recently complain to?
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?
Q.83	Which supplier did you have contact with most recently?
Q.84	How satisfied or dissatisfied overall were you with the way the supplier dealt with you?
Q.98	Did you take any of the following actions as a result of receiving the annual summary? (I checked what I'm currently paying for my energy or found out about the tariff that I'm on / I looked into switching tariffs with my current supplier / I looked into switching to a different supplier / I thought about switching tariffs either with this supplier or a different supplier, but have not yet started looking)
Q.102	Did you take any of the following action as a result of receiving the bill or direct debit/prepayment statement? (I checked what I'm currently paying for my energy or found out about the tariff that I'm on / I looked into switching tariffs with my current supplier / I looked into switching to a different supplier / I thought about switching tariffs either with this supplier or a different supplier, but have not yet started looking / I used the QR code to find out more about my existing tariff or to compare tariffs)
Q.106	Did you take any of the following action as a result of receiving the price increase notice? (I checked what I'm currently paying for my energy or found out about the tariff that I'm on / I looked into switching tariffs with my current supplier / I looked into switching to a different supplier / I thought about switching tariffs either with this supplier or a different supplier, but have not yet started looking)
Q.110	Did you take any of the following action as a result of receiving the end of fixed term letter? (I checked what I'm currently paying for my energy or found out about the tariff that I'm on / I looked into switching tariffs with my current supplier / I looked into switching to a different supplier / I thought about switching tariffs either with this supplier or a different supplier, but have not yet started looking)
Q.168	Energy suppliers are required to notify customers about savings they could make by managing their account online, changing tariff or changing their payment method with their current supplier. Do you recall seeing a message like this?



Q.169	And where did you see this?
Q.170	And to what extent, if at all, did this encourage you to...? (Check your current tariff / Compare your current tariff against other tariffs from your supplier or another supplier / Switch your tariff and/or supplier)
Q.171	Energy suppliers are now required to provide a Tariff Comparison Rate (TCR) for each tariff they offer. This is an indicative price per unit of energy, taking into account all the charges and discounts. Prior to this interview, have you seen a TCR?
Q.172	And where did you see this?
Q.173	And to what extent, if at all, did this encourage you to...? (Check your current tariff / Compare your current tariff against other tariffs from your supplier or another supplier / Switch your tariff and/or supplier)
Q.176	<i>(Personal projection plan)</i> And to what extent, if at all, did this encourage you to...? (Check your current tariff / Compare your current tariff against other tariffs from your supplier or another supplier / Switch your tariff and/or supplier)
Q.127	Could you tell me the extent to which you agree or disagree with the following statements? (Financially things are a bit of a struggle for me / I always like to look for ways that I can save money, even if it is only a little / I often make a decision on impulse / Everything seems to be getting more complicated these days / I always check bank or building society statements when I get them, including online)

5.2 2017 full questionnaire

OFGEM CONSUMER SURVEY
FINAL Questionnaire
272.209.30306
March 2017

Base: F0: All respondents

INTRO1

READ OUT

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.

To start with, a few questions to make sure we are speaking with the right people

Base: F0: All respondents

Q1

SINGLE CODE

SHOW SCREEN

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

Base: F1: Has gas and/or electricity supply

Q2

SINGLE CODE

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

INTERVIEWER INSTRUCTION: 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

Base: F2: Has gas and/or electricity supply and responsible for it

Intro2

READ OUT

Before we start to speak about energy, I would like to ask a few questions about you.

The first few questions are about whether and how you like to shop around for major service providers or for major purchases - not just for energy.

Base: F2: Has gas and/or electricity supply and responsible for it

Empow

SINGLE CODE FOR EACH QUESTION
SHOW AS INDIVIDUAL QUESTIONS
ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

To what extent do you agree or disagree with these things?

- i. As soon as I see a problem or challenge I start looking for possible solutions
- ii. I am able to follow through with things once I've made up my mind to do something
- iii. I can't possibly know everything before making a decision
- iv. I usually continue to search for an item until it reaches my expectations
- v. When shopping for a major purchase, I don't mind spending several hours looking for it
- vi. I would rather stick with a product that I currently buy than try something I'm not sure of
- vii. I am usually among the first to try a new product when it appears on the market
- viii. I will give in if a negotiation is not going my way
- ix. When looking for new products and services, I often find the amount of information overwhelming
- x. I always like to look for ways that I can save money, even if it is only a little
- xi. I always check bank or building society statements when I get them, including online

1. Disagree strongly
2. Disagree
3. Disagree slightly
4. Neither agree nor disagree
5. Agree slightly
6. Agree
7. Agree strongly
99. Don't know
98. Prefer not to say

Base: F2: Has gas and/or electricity supply and responsible for it

Intro3

READ OUT

Now some questions specifically about energy suppliers

Base: F5: Has gas and electricity supply and responsible for it

Q150

SINGLE CODE

SHOW SCREEN

Is your gas and electricity supplied by the same energy supplier?

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

Base: F3: Has gas only supply and responsible for it / F6: Has different gas and electricity suppliers, or not sure if the same

Q3

SINGLE CODE

SHOW SCREEN

Who is your current gas supplier?

British Gas

E.ON

EDF

Npower

SSE

Scottish Power

Affect Energy

Avro Energy

Axis Telecom

Better Energy

Breeze

Bristol Energy & Technology Service

Bulb energy

Cardiff Energy Supply

Co-operative Energy Limited

Daligas

E (Gas and Electricity) Limited

Economy Energy

Ecotricity

Effortless Energy

Engie

Entice Energy Supply Limited

Eversmart

Extra Energy Supply Limited

First Utility

Flow Energy

Future Energy (Supply)

Gnergy

Good Energy

Green Energy

Green Network Energy Limited

Green Star Energy

Iresa

iSupply Energy

LOCO2

M&S Energy

Octopus Energy Limited

Our Power Energy Supply Ltd

Ovo

Places for People Energy

Pozitive Energy

Robin Hood Energy Limited

Sainsbury's Energy

So Energy

Spark Energy

Tonik

Toto Energy Limited

UK NATIONAL GAS LTD

Utilita

Utility Warehouse

Zog Energy

Other - PEN WRITE IN

Refused

Don't know

Base: F4: Has electricity only supply and responsible for it / F6: Has different gas and electricity suppliers, or not sure if the same

Q4

SINGLE CODE

SHOW SCREEN

Who is your current electricity supplier?

British Gas	Gnergy
E.ON	Good Energy
EDF	Green Energy
Npower	Green Network Energy Limited
SSE	Green Star Energy
Scottish Power	Iresa
	iSupply Energy
Affect Energy	LOCO2
Avro Energy	M&S Energy
Axis Telecom	Octopus Energy Limited
Better Energy	Our Power Energy Supply Ltd
Breeze	Ovo
Bristol Energy & Technology Service	Places for People Energy
Bulb energy	Pozitive Energy
Cardiff Energy Supply	Robin Hood Energy Limited
Co-operative Energy Limited	Sainsbury's Energy
Daligas	So Energy
E (Gas and Electricity) Limited	Spark Energy
Economy Energy	Tonik
Ecotricity	Toto Energy Limited
Effortless Energy	UK NATIONAL GAS LTD
Engie	Utilita
Entice Energy Supply Limited	Utility Warehouse
Eversmart	Zog Energy
Extra Energy Supply Limited	Other - PEN WRITE IN
First Utility	Refused
Flow Energy	Don't know
Future Energy (Supply)	

Base: F7: Has gas and electricity supply from the same supplier and responsible for it

Q151

SINGLE CODE

SHOW SCREEN

Who is your current gas and electricity supplier?

British Gas

E.ON

EDF

Npower

SSE

Scottish Power

Refused

Don't know

Affect Energy

Avro Energy

Axis Telecom

Better Energy

Breeze

Bristol Energy & Technology Service

Bulb energy

Cardiff Energy Supply

Co-operative Energy Limited

Daligas

E (Gas and Electricity) Limited

Economy Energy

Ecotricity

Effortless Energy

Engie

Entice Energy Supply Limited

Eversmart

Extra Energy Supply Limited

First Utility

Flow Energy

Future Energy (Supply)

Gnergy

Good Energy

Green Energy

Green Network Energy Limited

Green Star Energy

Iresa

iSupply Energy

LOCO2

M&S Energy

Octopus Energy Limited

Our Power Energy Supply Ltd

Ovo

Places for People Energy

Positive Energy

Robin Hood Energy Limited

Sainsbury's Energy

So Energy

Spark Energy

Tonik

Toto Energy Limited

UK NATIONAL GAS LTD

Utilita

Utility Warehouse

Zog Energy

Other - PEN WRITE IN

Base: F3: Has gas only supply and responsible for it / F6: Has different gas and electricity suppliers, or not sure if the same

Q5

SINGLE CODE

SHOW SCREEN

How do you pay for your gas?

INTERVIEWER: IF PAYMENT BOOK/CARD, CHECK "Are you certain that is a payment card/book or is it a prepayment meter?"

- 1: Monthly direct debit (where your supplier takes the same amount of money from your bank account, each month, automatically)
- 2: Quarterly direct debit (where your supplier takes money from your bank account automatically, to cover your last three month's energy use)
- 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, or online, or using an app)
- 5: Fuel direct (where a set amount is deducted from your benefits before you receive them)
- 6: Weekly \ fortnightly payment scheme
- 7: Payment book/card where you can pay money in whenever you choose (ad hoc). Payments you make are automatically deducted from your next bill
- 97: Other - please type in
- 98: Refused
- 99: Don't know

Base: F4: Has electricity only supply and responsible for it / F5: Has gas and electricity supply and responsible for it

Q6

SINGLE CODE

SHOW SCREEN

How do you pay for your electricity?

INTERVIEWER INSTRUCTION: Check if on dual fuel deal

INTERVIEWER: IF PREPAYMENT, CHECK "Are you certain that is a payment card/book or is it a prepayment meter?"

- 1: Monthly direct debit (where your supplier takes the same amount of money from your bank account, each month, automatically)
- 2: Quarterly direct debit (where your supplier takes money from your bank account automatically, to cover your last three month's energy use)
- 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, or online, or using an app)
- 5: Fuel direct (where a set amount is deducted from your benefits before you receive them)
- 6: Weekly \ fortnightly payment scheme
- 7: Payment book/card where you can pay money in whenever you choose (ad hoc). Payments you make are automatically deducted from your next bill
- 97: Other - please type in
- 98: Refused
- 99: Don't know

Base: F101 have gas and electricity from same supplier and pay for them both in the same way (e.g. direct debit, on receipt of bill only)

PayTy

SINGLE CODE

TEXT SUBSTITUTION: NOTE THERE ARE TWO IN THE QUESTION

If codes 1 or 2 at Q5& Q6 <pay a single direct debit do two direct debits come out of your account>
If code 3 at Q5&Q6 <receive a single bill are they billed separately>

Can I just check, do you <pay a single direct debit/receive a single bill> for your gas and electricity supply, or <do two direct debits come out of your account/are they billed separately?>

1. Pay both together
2. Pay separately
99. Don't know

Base: F2: Has gas and/or electricity supply and responsible for it

Q8

CAPTURE NUMERIC AMOUNT

ALLOW DK AND REFUSED OPTIONS

MIN £1; MAX £3000

SHOW SCREEN

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 across the whole year, including the winter.

If you're not sure, you can just give me an approximate value.

INTERVIEWER INSTRUCTION: The next question will ask you to record the timescale (i.e. per year, month or week) and whether this is the actual amount or an approximation.

Enter number

Base: F42: All who spend something on home energy

Q9

SINGLE CODE

Interviewer code, was that...

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

Base: F42: All who spend something on home energy

Apprx

SINGLE CODE

And can I check, is that the actual amount you pay or an approximation?

1. Actual amount
2. Approximation/guess
99. Don't know

Base: F2: Has gas and/or electricity supply and responsible for it

Intro4

TEXT SUBSTITUTION

Display energy type <gas / electricity / gas and electricity> based on following:

gas = F3

electricity = F4

gas and electricity = F5

READ OUT

The next few questions are about your energy tariff. An energy tariff is the pricing plan for the <gas / electricity / gas and electricity> that you use.

Base: F7: Has gas and electricity supply from the same supplier and responsible for it

Q153

SINGLE CODE**ALTERNATE ORDER OF ANSWER LIST****SHOW SCREEN**

Q.153 How familiar would you say you are with the features of your current energy 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
- 98: Refused
- 99: Don't know

Base: F3: Has gas only supply and responsible for it / F6: Has different gas and electricity suppliers, or not sure if the same

Q89

SINGLE CODE**ALTERNATE ORDER OF ANSWER LIST****SHOW SCREEN**

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
- 98: Refused
- 99: Don't know

Base: F4: Has electricity only supply and responsible for it / F6: Has different gas and electricity suppliers, or not sure if the same

Q90

SINGLE CODE**ALTERNATE ORDER OF ANSWER LIST****SHOW SCREEN**

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
 98: Refused
 99: Don't know

Base: F2: Has gas and/or electricity supply and responsible for it

Q10

SINGLE CODE

TEXT SUBSTITUTION

Display energy type <gas / electricity / gas and electricity> based on following:

gas = F3

electricity = F4

gas and electricity = F5

Display response codes based on following:

1. Yes, gas only = F3 or F5

2. Yes, electricity only = F4 or F5

3. Yes gas and electricity = F5

SHOW SCREEN

Do you primarily manage your <gas/ electricity/ gas and electricity> account online or via an app?

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

Base: F2: Has gas and/or electricity supply and responsible for it

Q11

SINGLE CODE

TEXT SUBSTITUTION

Display energy type in question wording from <gas / electricity / gas and electricity> based on following:

gas = F3

electricity = F4

gas and electricity = F5

Display response codes based on following:

1. Yes, gas only = F3 or F5

2. Yes, electricity only = F4 or F5

3. Yes gas and electricity = F5

SHOW SCREEN

A fixed term tariff is a tariff that has a definite end date. Are you on a fixed term tariff for <gas / electricity / gas and electricity>?

IF NECESSARY: These tariffs often state the length in their name, such as a 12 months fix, or a March 2018 fix

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

Base: F4: Has electricity only supply and responsible for it / F5: Has gas and electricity supply and responsible for it

Q13

SINGLE CODE

SHOW SCREEN

Do you pay different amounts for your energy depending on when you use it. For example, energy costs you less at night-time or you get free energy at the weekend?

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

Base: F2: Has gas and/or electricity supply and responsible for it

Intro5

READ OUT

Now a few questions about smart meters.

Base: F2: Has gas and/or electricity supply and responsible for it

SM1

SINGLE CODE

Smart meters monitor energy consumption in the home.
Before today had you heard of smart meters?

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

Base: F111 Aware of smart meters

SM2

SINGLE CODE

ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

Which of the statements below do you think most accurately describes who can install a smart meter?

- 1) A smart meter can only be installed by an energy company or a contractor working for them
- 2) In most cases, but not all, a smart meter has to be installed by an energy company
- 3) A smart meter can be installed by any householder as long as they follow the instructions
- 98: Refused
- 99: Don't know

Base: F111 Aware of smart meters

SM3

MULTIPLE CODE

ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

And which, if any, of the following statements about smart meters do you believe to be true?
You can select more than one statement'

- 1) Smart meters allow you to see in pounds and pence the amount of energy you are using in real time
 - 2) A smart meter in your home means you will receive accurate bills rather than estimated ones from your energy supplier
- 96: None of these
98: Refused
99: Don't know

Base: F111 Aware of smart meters

SM4

SINGLE CODE

Do you have a smart meter?

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

Base: F129 Has a smart meter (SM4=1)

SM6

SHOW AS GRID SINGLE CODE PER STATEMENT

SHOW SCREEN

As a result of getting a smart meter, to what extent do you do the following things? Please only think about what you've done since you've received a smart meter, compared to what you did before you had a smart meter.

Since receiving a smart meter, to what extent...

1. Do you use less energy
2. Do you use certain appliances or devices less often
3. Have you stopped using certain appliances or devices
4. Do you turn off the lights more
5. Do you keep the thermostat at a lower temperature

1. Greatly
2. Fairly
3. Slightly
4. Not at all

Base: F2: Has gas and/or electricity supply and responsible for it

Intro6

READ OUT

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

Base: F2: Has gas and/or electricity supply and responsible for it

Q14

MULTIPLE CODE

ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

Which of the following do you think it is possible for energy customers to do?

INTERVIEWER INSTRUCTION: Multiple code as many as apply

- 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
- 96: None
- 98: Refused
- 99: Don't know

Base: F2: Has gas and/or electricity supply and responsible for it

Q21

SINGLE CODE

SHOW SCREEN

How many times, if at all, have you ever switched your gas supplier?

- 1: Once
- 2: Twice
- 3: Three times
- 4: Four times or more
- 5: Don't know how many times, but I definitely have switched gas supplier before
- 6: Have never switched gas supplier
- 98: Refused
- 99: Don't know

Base: F112 Ever switched gas supplier

Q138

SINGLE CODE

SHOW SCREEN

When did you last switch gas supplier?

1. In the last 12 months
 2. Between 1 and 2 years ago
 3. Between 2 and 3 years ago
 4. Between 3 and 4 years ago
 5. Between 4 and 5 years ago
 6. Between 5 and 9 years ago
 7. 10 or more years ago
- 98 Refused
99 Don't know

Base: F2: Has gas and/or electricity supply and responsible for it

Q22

SINGLE CODE

SHOW SCREEN

How many times, if at all, have you ever switched your electricity supplier?

- 1: Once
 - 2: Twice
 - 3: Three times
 - 4: Four times or more
 5. Don't know how many times, but I definitely have switched gas supplier before
 - 6: Have never switched electricity supplier
- 98: Refused
99: Don't know

Base: F113 Ever switched electricity supplier

Q139

SINGLE CODE

SHOW SCREEN

When did you last switch electricity supplier?

1. In the last 12 months
 2. Between 1 and 2 years ago
 3. Between 2 and 3 years ago
 4. Between 3 and 4 years ago
 5. Between 4 and 5 years ago
 6. Between 5 and 9 years ago
 7. 10 or more years ago
- 98 Refused
99 Don't know

Base: F114 Switched gas and electricity supplier in past 12 months

Q154

SINGLE CODE

SHOW SCREEN

Thinking about the last time you switched an energy supplier, which of these did you do?
The last time I switched, I switched...

- 1: ... gas supplier only
- 2: ...electricity supplier only
- 3: ... gas and electricity suppliers at the same time
- 98: Refused
- 99: Don't know

Base: F2: Has gas and/or electricity supply and responsible for it

TmesG

SINGLE CODE

SHOW SCREEN

How many times if at all, have you ever switched your gas tariff?
By this we mean, staying with the same gas supplier, but changing your deal e.g. moving from the supplier's variable rate to a fixed rate?
Please don't think here about times when you have switched supplier, but just about when you switched tariff

- 1: Once
- 2: Twice
- 3: Three times
- 4: Four times or more
- 5: Don't know how many times, but I definitely have switched gas tariff before
- 6: Have never switched gas tariff
- 98: Refused
- 99: Don't know

Base: F115 Ever switched gas tariff

WhnSG

SINGLE CODE

SHOW SCREEN

When did you last switch gas tariff?

- 1. In the last 12 months
- 2. Between 1 and 2 years ago
- 3. Between 2 and 3 years ago
- 4. Between 3 and 4 years ago
- 5. Between 4 and 5 years ago
- 6. Between 5 and 9 years ago
- 7. 10 or more years ago
- 98 Refused
- 99 Don't know

Base: F2: Has gas and/or electricity supply and responsible for it

TmesE

SINGLE CODE

SHOW SCREEN

How many times if at all, have you ever switched your electricity tariff?

By this we mean, staying with the same electricity supplier, but changing your deal e.g. moving from the supplier's variable rate to a fixed rate?

Please don't think here about times when you have switched supplier, but just about when you switched tariff

- 1: Once
- 2: Twice
- 3: Three times
- 4: Four times or more
- 5: Don't know how many times, but I definitely have switched gas tariff before
- 6: Have never switched electricity tariff
- 98: Refused
- 99: Don't know

Base: F116 Ever switched electricity tariff

WhnSE

SINGLE CODE

SHOW SCREEN

When did you last switch electricity tariff?

- 1. In the last 12 months
- 2. Between 1 and 2 years ago
- 3. Between 2 and 3 years ago
- 4. Between 3 and 4 years ago
- 5. Between 4 and 5 years ago
- 6. Between 5 and 9 years ago
- 7. 10 or more years ago
- 98 Refused
- 99 Don't know

Base: F117 Switched gas and electricity tariff in past 12 months

Switch

SINGLE CODE

SHOW SCREEN

Thinking about the last time you switched an energy tariff which of these did you do?

The last time I switched, I switched...

- 1: ... gas tariff only
- 2: ... electricity tariff only
- 3: ... gas and electricity tariffs at the same time
- 98: Refused
- 99: Don't know

Base: F3: Has gas only supply and responsible for it / F5: Has gas and electricity supply and responsible for it

ChngG

MULTIPLE CODE

ALTERNATE ORDER OF ANSWER LIST

Thinking about your gas supply, which if any of these have you done in the past 12 months?

1. Changed payment method
 2. Compared my gas tariff with those offered by other gas suppliers
 3. Compared my gas tariff with those offered by my own supplier
- 96 None of these
99 Don't know
98 Refused

Base: F4: Has electricity only supply and responsible for it / F5: Has gas and electricity supply and responsible for it

ChngE

MULTIPLE CODE

ALTERNATE ORDER OF ANSWER LIST

Thinking about your electricity supply, which if any of these have you done in the past 12 months?

1. Changed payment method
 2. Compared my electricity tariff with those offered by other electricity suppliers
 3. Compared my electricity tariff with those offered by my own supplier
- 96 None of these
99 Don't know
98 Refused

Base: F118 Switched gas or electricity supplier or tariff, or compared suppliers or tariffs in the past 12 months

Dummset

MULTIPLE CODE: SET AS FOLLOWS:

- 1 (switched gas supplier) = q138=1 AND NOT q154=3
- 2 (switched electricity supplier) = q139=1 AND NOT q154=3
- 3 (switched gas and electricity suppliers together) = q154=3
- 4 (switched gas tariff) = WhnSG=1 AND NOT switch=3
- 5 (switched electricity tariff) = WhnSE=1 AND NOT switch=3
- 6 (switched gas and electricity tariff together) = switch=3
- 7 (compared gas suppliers) = ChngG = 2
- 8 (compared gas tariffs offered by your own supplier) = ChngG=3
- 9 (compared electricity suppliers) = ChngE=2
- 10 (compared electricity tariffs offered by your own supplier) = ChngE=3
- 96 None of the above

SET PRIORITY OF WHICH RECENT EXPERIENCE TO ASK ABOUT

IF MULTIPLE CODED, PRIORITY IS:

- A SWITCHED SUPPLIER (1 OR 2 OR 3)
- B SWITCHED TARIFF (4 OR 5 OR 6)
- C COMPARED (7 OR 8 OR 9 OR 10)

IF MULTIPLE CODE WITHIN SELECTED CATEGORY, CHOOSE ONE WITHIN THAT CATEGORY AT RANDOM

Set selected variable as Dumm1

QUESTION NOT TO BE ASKED

PAST 12 MONTHS:

- 1: switched gas supplier
- 2: switched electricity supplier
- 3: switched gas and electricity suppliers together
- 4: switched gas tariff
- 5: switched electricity tariff
- 6: switched gas and electricity tariff together
- 7: compared gas suppliers
- 8: compared gas tariffs offered by your own supplier
- 9: compared electricity suppliers
- 10: compared electricity tariffs offered by your own supplier
- 96: None of these

Base: F2: Has gas and/or electricity supply and responsible for it

Intro6b

TURN SCREEN AWAY FROM RESPONDENT UNTIL TOLD OTHERWISE

Base: F118 Switched gas or electricity supplier or tariff, or compared suppliers or tariffs in the past 12 months

Intro7A

SUBSTITUTE FROM DUMM1

READ OUT

The next few questions are about the last time you <answer from Dumm1> in the past 12 months

Base: F118 Switched gas or electricity supplier or tariff, or compared suppliers or tariffs in the past 12 months

Q160

MULTIPLE CODE

MAX 3 ANSWERS

SUBSTITUTE IN FROM DUMM1

DO NOT PROMPT

Thinking of the last time you <answer from Dumm1> , what were your priorities?

IF 'Saving money' PROBE TO PRECODES

PROBE: What other things were your priorities?

CODE UP TO 3 RESPONSES

- 1: Saving money/paying less than before
- 2: Avoiding price rise
- 3: Get better customer service
- 4: Wanted a 'greener' tariff
- 5: Wanted a fixed term \ fixed price deal
- 6: Wanted a dual fuel package
- 7: Wanted an online tariff
- 8: Wanted to bundle with other services (e.g. energy and broadband or telephone combined)
- 9: Get other benefits (e.g. loyalty points)
- 10: The reputation of the supplier
- 11: Getting a smart meter \ in home display
- 12: Home energy related incentives (e.g. boiler maintenance, home insulation)
- 13: Preference for Big 6 (British Gas, Scottish Power, SSE, Eon, NPower, EDF)
- 14: Preference to avoid the Big 6 (British Gas, Scottish Power, SSE, Eon, NPower, EDF)
- 15: A supplier I know

- 16. To avoid the hassle of switching
- 97: Other - please type in
- 98: Refused
- 99: Don't know

Base: F119 Gave more than one response at Q160

MainP

SINGLE CODE
SHOW ONLY ANSWERS GIVEN AT Q160
SUBSTITUTE IN FROM DUMM1

DO NOT PROMPT

And which of these was your main priority the last time you <answer from Dumm1>?

Was it...

READ OUT

- 1: Saving money/paying less than before
- 2: Avoiding price rise
- 3: Get better customer service
- 4: Wanted a 'greener' tariff
- 5: Wanted a fixed term \ fixed price deal
- 6: Wanted a dual fuel package
- 7: Wanted an online tariff
- 8: Wanted to bundle with other services (e.g. energy and broadband or telephone combined)
- 9: Get other benefits (e.g. loyalty points)
- 10: The reputation of the supplier
- 11: Getting a smart meter \ in home display
- 12: Home energy related incentives (e.g. boiler maintenance, home insulation)
- 13: Preference for Big 6 (British Gas, Scottish Power, SSE, Eon, NPower, EDF)
- 14: Preference to avoid the Big 6 (British Gas, Scottish Power, SSE, Eon, NPower, EDF)
- 15: A supplier I know
- 16. To avoid the hassle of switching
- 97: Other - please type in
- 98: Refused
- 99: Don't know

Base: F118 Switched gas or electricity supplier or tariff, or compared suppliers or tariffs in the past 12 months

Q161

MULTIPLE CODE
MAX 3 ANSWERS
RECORD ORDER
SUBSTITUTE IN FROM DUMM1

DO NOT PROMPT

And thinking about the last time you <answer from Dumm1>, what were the main reasons that caused you to do that?

IF NECESSARY: Was it something that happened that made you start to think about it, or was there something that you saw or heard or read?

INTERVIEWER INSTRUCTION: Multiple code up to 3 responses

- 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 information about my energy consumption 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 received a communication from another supplier
- 9 I experienced poor customer service
- 10 I moved home
- 11 I heard my energy supplier's prices were going up
- 12 Media coverage about energy suppliers in general
- 13 I was looking at a money saving website
- 14 I saw a TV advert/programme
- 15 I heard a radio advert/programme
- 16 I saw an ad/article in a newspaper/magazine
- 17 I saw someone post something on social media (Facebook, Instagram, Twitter, etc.)
- 18 I saw an advert/article online
- 19 Other advertising
- 20 Talked to a friend, family member, or neighbour
- 97: Other - please type in
- 98 Refused
- 99 Don't know

Base: F118 Switched gas or electricity supplier or tariff, or compared suppliers or tariffs in the past 12 months

Q165

MULTIPLE CODE
SUBSTITUTE IN FROM DUMM1

DO NOT PROMPT

And when you last <answer from Dumm1>, how did you find out about the deals offered?

INTERVIEWER INSTRUCTION: Multiple code as many as apply

- 1: I used an online\website price comparison service (e.g. USwitch, Money Supermarket)
- 2: Using an automated switching service (e.g. Flipper, Voltz, Swuto, Energy Scanner)
- 3: I rang my supplier
- 4: I rang other suppliers
- 5: I looked at my supplier's own website
- 6: I looked at the websites of other suppliers
- 7: I spoke to a supplier salesperson in the street\shopping centre \ public place
- 8: A friend or family member told me about it
- 9: A supplier salesperson knocked at my door
- 10: A new supplier phoned me
- 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.)
- 97: Other - please type in
- 98 Refused
- 99 Don't know

Base: F102 Switched/compared last time using online price comparison site

Deals

SINGLE CODE

You mentioned that you found out about the deals offered when you last <answer from Dumm1> using an online price comparison service.

How many online price comparison sites did you visit?

- 1. One
- 2. Two
- 3. Three or more
- 99. Don't know
- 98. Refused

Base: F108 Shopped around in energy market but not switched supplier or tariff in P12M, or not shopped around in energy market at all in P12M

NotSh

SHOW AS GRID

CODE FIRST MENTION (SINGLE CODE) THEN OTHER MENTIONS (MULTIPLE CODE)
NOTE, ITEMS IN BOLD ON ANSWER LIST ARE HEADINGS AND SHOULD NOT BE CODEABLE AS ANSWERS

TEXT SUBSTITUTION:

If Dummset = 96 then use -> shopped around to see if there are any better energy deals

If Dummset = 7-10 then use -> switched tariff or switched supplier

DO NOT PROMPT

Are there any particular reasons why you have not <shopped around to see if there are any better energy deals /switched tariff or switched supplier>?

CHOOSE ALL THAT APPLY. CODE FIRST MENTION THEN OTHER MENTIONS

INTERVIEWER: IF RESPONDENT SAYS "HAPPY WITH/LIKE CURRENT SUPPLIER" THEN PROBE WHAT DO YOU LIKE ABOUT YOUR EXISTING SUPPLIER?

Cost/price

1. Existing supplier/tariff is satisfactory
2. Didn't think I'd save enough to make it worthwhile changing
3. Confident I'm on the best deal for me
4. Payment / direct debit all set up

Quality / reliability – existing supplier

5. Good service from existing supplier (including customer service, reliable supply etc)
6. Get accurate/useful/informative/clear bills on time

Existing supplier characteristics

7. Good reputation - existing supplier
8. Green credentials - existing supplier
9. Ethical credentials – existing supplier

Additional features / services of existing supplier

10. Customer loyalty scheme (e.g. perks, reward points, vouchers, cashback)
11. Range of other products e.g. Boiler maintenance/home care service/emergency repair Searching for alternative
12. Energy bundled in with other services (e.g. telephone, credit card)
13. Difficult to find information (include information about own tariffs/bills/usage/other suppliers)
14. Don't understand /difficult to compare tariffs

Switching to alternative

15. In debt to supplier
16. Unable to switch- landlord won't allow
17. Have smart meter/difficult to switch with smart meter
18. Previous negative experience of switching
19. Current contract longer than a year

General

20. Not interested
21. Too complicated
22. All suppliers are much the same/no difference
23. Too much hassle/effort
24. Wasn't aware you could switch/change
25. Don't know how to do it
96. Nothing specific
97. Other (specify)
99. Don't know
98. Prefer not to say

Base: F2: Has gas and/or electricity supply and responsible for it

Recom

MULTIPLE CODE

SHOW SCREEN

Apart from salespeople working for energy companies, has anyone made any of these recommendations to you in the last 12 months?

This could be a friend, family member, someone you know on social media, or an other organisation.

1. Recommended that I switch supplier
2. Recommended a particular energy supplier/deal
3. Warned me away from a particular energy supplier/deal

96: None

98: Refused

99: Don't know

Base: f120 Recommendations made at Recom

Intro7A

TURN SCREEN AWAY FROM RESPONDENT UNTIL TOLD OTHERWISE

Base: f120 Recommendations made at Recom

Whoma

MULTIPLE CODE

DO NOT PROMPT

Who made those recommendations?

1. Husband/wife/partner
2. Parent/grandparent
3. Son/daughter (including in law)
4. Other relative
5. Friend/neighbour
6. Citizens' Advice Bureau/other advice organisation
7. Local council
8. Charity or community group (e.g. Age UK, disability group)
9. Someone you follow on social media (e.g. Facebook, Twitter)
10. Someone on an online forum (e.g. Mumsnet, local Facebook group, Moneysavingexpert Forums)
97. Someone else (specify)
99. Don't know
98. Refused

Base: F123 Switched gas or electricity supplier or tariff in past 12 months

Intro8

READ OUT

Now some more questions about the last time you <answer from Dumm1>.

Base: F123 Switched gas or electricity supplier or tariff in past 12 months

Intro9

READ OUT AND SHOW SCREEN

The next question is about different types of tariffs.

With a Fixed Tariff, your contract has a definite end date, after which you will usually be rolled onto your supplier's variable or standard rate.

With a Variable Tariff (also sometimes called a standard tariff) your contract doesn't have a fixed end date. You will stay on this tariff unless you make a choice to change it.

Base: F123 Switched gas or electricity supplier or tariff in past 12 months

SwitTa

SINGLE CODE

ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

Can I just check, the last time you <answer from Dumm1>, which of these best describes what you did?

1. Switched from a variable tariff to a fixed term tariff
2. Switched from a variable tariff to another variable tariff
3. Switched from a fixed term tariff to a variable tariff
4. Switched from a fixed term tariff to another fixed term tariff
99. Don't know
98. Refused

Base: F123 Switched gas or electricity supplier or tariff in past 12 months

Intro9A

TURN SCREEN AWAY FROM RESPONDENT UNTIL TOLD OTHERWISE

Base: F123 Switched gas or electricity supplier or tariff in past 12 months

Q156

SINGLE CODE

DO NOT PROMPT

Thinking of the last time you <answer from Dumm1> how did you switch?

INTERVIEWER INSTRUCTION: PROBE TO PRECODES

EVEN IF THE RESPONDENT SOUGHT INFORMATION IN DIFFERENT WAYS, WE ARE INTERESTED IN THE WAY THEY ACTUALLY MADE THE SWITCH

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

Base: F102 Switched/compared last time using online price comparison site

PCWSw

SINGLE CODE

Did you actually complete the switch through the online price comparison service, or did you find out information from them and then complete the switch in some other way (e.g. calling the supplier you wanted to switch to)?

1. Completed switch through price comparison service
2. Completed switch in some other way
99. Don't know
98. Refused

Base: F123 Switched gas or electricity supplier or tariff in past 12 months

HelpS

MULTIPLE CODE

Did anyone who doesn't live with you go through or help you through the switching process on your behalf? If so, who?

1. No-one, I completed the switching process myself
It was done for me by...
2. Parent/grandparent
3. Son/daughter (including in law)
4. Other relative
5. Friend/neighbour
6. Citizens' Advice Bureau
7. Local council
8. Charity or community group (e.g. Age UK, disability group)
97. Someone else (specify)
99. Don't know
98. Refused

Base: F123 Switched gas or electricity supplier or tariff in past 12 months

Q157

SINGLE CODE

ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

Thinking of the last time you <answer from Dumm1>, how much do you agree or disagree with the statement?

"I found it easy to decide which deal to switch to"

- 1: Agree strongly
- 2: Tend to agree
- 3: Neither agree nor disagree
- 4: Tend to disagree
- 5: Disagree strongly
- 98: Refused
- 99: Don't know

Base: F123 Switched gas or electricity supplier or tariff in past 12 months

Q166

MULTIPLE CODE

SHOW SCREEN

To the best of your knowledge, do you feel that you are now paying less than you would have if you had not <answer from Dumm1>?

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

Base: F125 Thought they would save money from the switch

MoreP

CAPTURE NUMERIC AMOUNT

ALLOW DK AND REFUSED RESPONSES

MIN £1; MAX £3000

TEXT SUBSTITUTION

If Dumm1=1 or 4 = gas
 If Dumm1= 2 or 5 = electricity
 If Dumm1= 3 or 6 = energy

SHOW SCREEN

If you hadn't <INSERT answer from Dumm1> how much more do you think you would be paying now for your <gas/electricity/energy>?

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

If you're not sure, you can just give me an approximate value.

INTERVIEWER INSTRUCTION: The next question will ask you to record the timescale (i.e. per year, month or week) and whether this is the actual amount or an approximation.

ENTER NUMBER

Base: F125 Thought they would save money from the switch

Frequ

SINGLE CODE

Interviewer code, is that...

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

Base: F125 Thought they would save money from the switch

Apprx2

SINGLE CODE

And can I check, is that the actual amount or an approximation?

1. Actual amount
2. Approximation/guess
99. Don't know

Base: F124 Switched gas or electricity supplier in past 12 months

OwedM

SINGLE CODE

When you last <answer from Dumm1>, were you owed money by your old supplier(s)? This may have been because you had a positive credit balance with the old supplier(s).

1. Yes
2. No
98. Refused
99. Don't know

Base: F126 Owed balance from old supplier when last switched

MonRe

SINGLE CODE

ALTERNATE ORDER OF ANSWER LIST

And how satisfied or dissatisfied were you with how quickly the money was returned to you by your old supplier(s)?

- 1: Very satisfied
- 2: Satisfied
- 3: Neither satisfied nor dissatisfied
- 4: Dissatisfied
- 5: Very dissatisfied
- 98: Refused
- 99: Don't know

Base: F133:NOT Switched gas or electricity supplier or tariff, or compared suppliers or tariffs in the past 12 months

Intro9B

TURN SCREEN AWAY FROM RESPONDENT UNTIL TOLD OTHERWISE

Base: F133:NOT Switched gas or electricity supplier or tariff, or compared suppliers or tariffs in the past 12 months

Q122

MULTIPLE CODE
MAX 3 ANSWERS

If you were to switch supplier or tariff, what would be your priorities when choosing a new deal?
IF 'Saving money' PROBE TO PRECODES
PROBE: What other priorities would you have?
CODE UP TO 3 RESPONSES

- 1: Saving money/ paying less than before
- 2: Avoiding price rise
- 3: Customer service
- 4: Having a greener tariff
- 5: Having a fixed term/fixed price tariff
- 6: Having a dual fuel package
- 7: Having an online tariff
- 16: Wanted to bundle with other services (e.g. energy and broadband or telephone combined)
- 8: Getting other benefits (e.g. loyalty points)
- 9: The reputation of the supplier
- 10: Getting a smart meter \ in home display
- 11: Home energy related incentives (e.g. boiler maintenance, home insulation)
- 12: Preference for Big 6 (British Gas, Scottish Power, SSE, Eon, NPower, EDF)
- 13: Preference to avoid the Big 6 (British Gas, Scottish Power, SSE, Eon, NPower, EDF)
- 14: A supplier I know
- 16: To avoid the hassle of switching
- 97: Other - SPECIFY
- 98: Refused
- 99: Don't know

Base: F121 Gave more than one response at Q122

PrioM

SINGLE CODE
SHOW ONLY ANSWERS GIVEN AT Q122

And which of these would be your main priority?
Would it be...

READ OUT

- 1: Saving money/ paying less than before
- 2: Avoiding price rise
- 3: Customer service
- 4: Having a greener tariff
- 5: Having a fixed term/ fixed price tariff
- 6: Having a dual fuel package
- 7: Having an online tariff
- 16: Wanted to bundle with other services (e.g. energy and broadband or telephone combined)
- 8: Getting other benefits (e.g. loyalty points)
- 9: The reputation of the supplier
- 10: Getting a smart meter \ in home display
- 11: Home energy related incentives (e.g. boiler maintenance, home insulation)
- 12: Preference for Big 6 (British Gas, Scottish Power, SSE, Eon, NPower, EDF)
- 13: Preference to avoid the Big 6 (British Gas, Scottish Power, SSE, Eon, NPower, EDF)
- 14: A supplier I know
- 16: To avoid the hassle of switching
- 97: Other - SPECIFY
- 98: Refused
- 99: Don't know

Base: F3: Has gas only supply and responsible for it / F6: Has different gas and electricity suppliers, or not sure if the same

Q123

SINGLE CODE

ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

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
- 98: Refused
- 99: Don't know

Base: F4: Has electricity only supply and responsible for it / F6: Has different gas and electricity suppliers, or not sure if the same

Q124

SINGLE CODE

ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

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
- 98: Refused
- 99: Don't know

Base: F7: Has gas and electricity supply from the same supplier and responsible for it

Q125

SINGLE CODE
ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

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
- 98: Refused
- 99: Don't know

Base: F2: Has gas and/or electricity supply and responsible for it

Tried

SINGLE CODE

Can I just check, in the past 12 months have you tried to switch gas or electricity supplier but have been unable to for some reason?
Please don't think about changing tariff with the same supplier, we are only interested in times when you have tried to change supplier.

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

Base: F106 Tried to switch but unable to

Descr

MULTIPLE CODE
RANDOMISE

SHOW SCREEN

Which, if any of these describe what happened?

- 1. I was unable to provide all the information required (e.g. meter numbers)
- 2. Failed a credit check with the new supplier/poor credit history
- 3. Existing supplier blocked the switch because I was in debt with them
- 3. Tariff/deal was not available to me because I have a prepayment meter
- 4. Poor credit history on property/not related to me
- 5. Landlord/council/housing association would not allow me to switch
- 6. New provider would not accept me (enter reason why)
- 7. Better deal expired/no longer available
- 8. Poor communication between existing and new supplier
- 9. Request to switch was lost
- 10. Computer crashed during process
- 11. I just decided not to go through with it/didn't bother in the end
- 12. I was not told the reason
- 97. Other (specify)
- 96. No particular reason
- 99. Don't know

Base: F2: Has gas and/or electricity supply and responsible for it

Intro3c

The next few questions are about your views on comparing and switching energy supplier more generally.

Base: F2: Has gas and/or electricity supply and responsible for it

Q73

SINGLE CODE
ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

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: Too little choice
- 98: Refused
- 99: Don't know

Base: F2: Has gas and/or electricity supply and responsible for it

Q145

SINGLE CODE
ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

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
- 98: Refused
- 99: Don't know

Base: F2: Has gas and/or electricity supply and responsible for it

PCWSt

SINGLE CODE PER STATEMENT
RANDOMISE STATEMENTS

To what extent do you agree or disagree with these things about price comparison websites?

- i. Price comparison websites all have the same energy deals on them
- ii. Price comparison websites are unbiased in the way they display energy deals
- iii. Price comparison websites make clear how potential savings are calculated

- 1: Agree strongly
- 2: Tend to agree
- 3: Neither agree nor disagree
- 4: Tend to disagree
- 5: Disagree strongly
- 98: Refused
- 99: Don't know

Base: F2: Has gas and/or electricity supply and responsible for it

Intro3d

SHOW SCREEN

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

Base: F2: Has gas and/or electricity supply and responsible for it

Q121

SINGLE CODE FOR EACH STATEMENT
RANDOMISE STATEMENTS

SHOW SCREEN

How much do you agree or disagree...?

- i) Switching is a hassle that I've not got time for
- ii) I worry that if I switch things will go wrong
- iv) Switching energy suppliers takes too long
- v) As far as I know, most of my family and friends regularly switch their energy supplier
- vi) It's too hard to work out whether I would save or not if I switched

- 1: Agree strongly
- 2: Tend to agree
- 3: Neither agree nor disagree
- 4: Tend to disagree
- 5: Disagree strongly
- 98: Refused
- 99: Don't know

Base: F2: Has gas and/or electricity supply and responsible for it

Intro3d

TURN SCREEN AWAY FROM RESPONDENT UNTIL TOLD OTHERWISE

Base: F2: Has gas and/or electricity supply and responsible for it

Risks

MULTIPLE CODE
RANDOMISE
RECORD OTHER

DO NOT PROMPT

What, if anything, do you think might be the risks associated with switching energy suppliers?

CODE ALL MENTIONED: PROBE: What other risks can you think of?

- 1. Something might go wrong and they might get cut off
- 2. New supplier might not accept them (e.g. because they don't use much energy, they have a poor credit rating)
- 3. New supplier might not accept people who have a prepayment meter
- 4. New supplier needs to change cables/pipes
- 5. New supplier needs to change meter(s)
- 6. Might lose functionality of smart meter/have to go back to doing meter readings
- 7. Might not save as much as they thought
- 8. Costs might go up
- 9. Supplier they switch to might go bust
- 10. Double/shock billing (might be billed by both suppliers)
- 97. Other risk (specify)
- 96. No risks
- 99. Don't know

Base: F2: Has gas and/or electricity supply and responsible for it

LongS

NUMERIC
RANGE
Days 1-365
Weeks: 1 - 52

If someone was to switch to a new energy supplier, how long do you think the process takes from the time that they ask to switch, to the time that the new supplier starts to supply their energy?
You can answer in days or weeks

Enter number of days
or
Enter number of weeks
99. Don't know

Base: F2: Has gas and/or electricity supply and responsible for it

Conf2

SINGLE CODE FOR EACH QUESTION
RANDOMISE

SHOW SCREEN

How confident or unconfident do you feel about doing these things related to energy suppliers?

- i. Comparing the different energy deals available
- ii. Choosing the best energy deal for your household
- iii. Making a complaint to your energy supplier, if you had a reason to complain
- iv. Understanding your energy bill

- 1: Very confident
- 2: Fairly confident
- 3: Neutral
- 4: Not very confident
- 5: Not confident at all
- 98: Refused
- 99: Don't know

Base: F2: Has gas and/or electricity supply and responsible for it

INTRO7

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

Base: F3: Has gas only supply and responsible for it / F6: Has different gas and electricity suppliers, or not sure if the same

Q60

SINGLE CODE FOR EACH QUESTION
RANDOMISE

SHOW SCREEN AND READ OUT STATEMENT

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

- i) Treat you fairly in their dealings with you
- ii) Provide clear and helpful information for you
- iii) Charge you a fair price for your gas

- 1: Completely trust
- 2: Tend to trust
- 3: Neither trust nor distrust

- 4: Tend to distrust
- 5: Strongly distrust
- 98: Refused
- 99: Don't know

Base: F4: Has electricity only supply and responsible for it / F6: Has different gas and electricity suppliers, or not sure if the same

Q64

SINGLE CODE FOR EACH QUESTION
RANDOMISE

SHOW SCREEN AND READ OUT STATEMENT

Now thinking about your electricity supplier... To what extent do you trust or distrust your electricity supplier to...?

- i) Treat you fairly in their dealings with you
- ii) Provide clear and helpful information for you
- iii) Charge you a fair price for your electricity

- 1: Completely trust
- 2: Tend to trust
- 3: Neither trust nor distrust
- 4: Tend to distrust
- 5: Strongly distrust
- 98: Refused
- 99: Don't know

Base: F7: Has gas and electricity supply from the same supplier and responsible for it

Q68

SINGLE CODE FOR EACH QUESTION
RANDOMISE

SHOW SCREEN AND READ OUT STATEMENT

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

- i) Treat you fairly in their dealings with you
- ii) Provide clear and helpful information for you
- iii) Charge you a fair price for your gas and electricity

- 1: Completely trust
- 2: Tend to trust
- 3: Neither trust nor distrust
- 4: Tend to distrust
- 5: Strongly distrust
- 98: Refused
- 99: Don't know

Base: F2: Has gas and/or electricity supply and responsible for it

SpAtt

SINGLE CODE FOR EACH QUESTION
RANDOMISE

SHOW SCREEN

To what extent do you agree or disagree with these statements about energy suppliers

- ii. I would be wary of using an energy supplier I have never heard of
- iii. If I was going to change energy supplier, I would look for a supplier who offered me extra rewards
- iv. I would be happy to pay slightly more for my energy if my supplier offered me better customer service

- 1: Agree strongly

- 2: Tend to agree
- 3: Neither agree nor disagree
- 4: Tend to disagree
- 5: Disagree strongly
- 98: Refused
- 99: Don't know

Base: F3: Has gas only supply and responsible for it / F6: Has different gas and electricity suppliers, or not sure if the same

Q59

SINGLE CODE
ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

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
- 98: Refused
- 99: Don't know

Base: F4: Has electricity only supply and responsible for it / F6: Has different gas and electricity suppliers, or not sure if the same

Q63

SINGLE CODE
ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

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
- 98: Refused
- 99: Don't know

Base: F7: Has gas and electricity supply from the same supplier and responsible for it

Q67

SINGLE CODE
ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

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
- 98: Refused
- 99: Don't know

Base: F3: Has gas only supply and responsible for it / F6: Has different gas and electricity suppliers, or not sure if the same

RateS_G

SINGLE CODE

ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

How do you rate your current gas supplier in terms of value for money?

1. Very good
 2. Quite good
 3. Neither good nor poor
 4. Quite poor
 5. Very poor
- 98: Refused
99: Don't know

Base: F4: Has electricity only supply and responsible for it / F6: Has different gas and electricity suppliers, or not sure if the same

RateS_E

SINGLE CODE

ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

How do you rate your current electricity supplier in terms of value for money?

1. Very good
 2. Quite good
 3. Neither good nor poor
 4. Quite poor
 5. Very poor
- 98: Refused
99: Don't know

Base: F7: Has gas and electricity supply from the same supplier and responsible for it

RateS_D

SINGLE CODE

ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

How do you rate your current energy supplier in terms of value for money?

1. Very good
 2. Quite good
 3. Neither good nor poor
 4. Quite poor
 5. Very poor
- 98: Refused
99: Don't know

Base: F2: Has gas and/or electricity supply and responsible for it

Intro8a

Now thinking about complaints

Base: F2: Has gas and/or electricity supply and responsible for it

Q76

SINGLE CODE

SHOW SCREEN

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

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

Base: F45: Not made complaint in past 12 months to current or previous supplier

Q81

SINGLE CODE

SHOW SCREEN

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
- 98: Refused
- 99: Don't know

Base: F127 Cause to complain but did not complain

NotCm

MULTIPLE CODE

SHOW SCREEN

Why did you not make a complaint at that time?

- 1. I'm not confident enough to complain
- 2. I didn't know how to complain
- 3. The complaints procedure seemed too complicated
- 4. The complaints process seemed to take too long
- 5. I didn't expect to get a good outcome from complaining
- 6. Complaining wasn't worth the time or hassle
- 7. I've previously had a bad experience of complaining
- 8. I decided to switch supplier instead

Base: F2: Has gas and/or electricity supply and responsible for it

Intro8b

Now thinking about contact with energy suppliers more generally

Base: F2: Has gas and/or electricity supply and responsible for it

Q82

MULTIPLE CODE

SHOW SCREEN - MULTIPLE CHOICE

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
- 98: Refused
- 99: Don't know

Base: F2: Has gas and/or electricity supply and responsible for it

INTRO9

The following questions are about how useful you find the information sent to you by your energy supplier(s) and other energy suppliers.

Base: F2: Has gas and/or electricity supply and responsible for it

Repre

MULTIPLE CODE

SHOW SCREEN

In the last 12 months has a representative of your supplier or another energy supplier attempted to sell you a new energy deal in any of these ways?

CODE ALL THAT APPLY

- 1: An unsolicited phone call to you
- 2: During a call you made to them
- 3: An unknown salesperson at the door
- 4: A salesperson in the street\ shopping centre\ other public place
- 5: In an online web chat
- 6: A friend or acquaintance who is selling on behalf of a supplier
- 96. None of these
- 99. Don't know
- 98. Refused

Base: F107 Approached by salesperson from own or other energy company

Words

MULTIPLE CODE

IF MORE THAN ONE CODED AT REPRES SELECT ONE ANSWER TO REFER TO USING THE FOLLOWING PRIORITY

- 1. Being sold to by a friend (CODE 6)
- 2. Being sold to at the door (CODE 3)
- 3. In shopping centre (CODE 4)
- 4. Unsolicited phone call (CODE 1)
- 5. Call you made to them (CODE 2)
- 6. Webchat (CODE 5)

TEXT SUBSTITUTION BASED ON REPRES, AS FOLLOWS:

GENERIC INTRO Thinking about the last time...

THEN SPECIFIC WORDING DEPENDING ON ANSWER AT REPRES

- 1. a supplier called you to sell you an energy deal...
- 2. you called a supplier and they tried to sell you an energy deal...
- 3. a supplier salesperson came to your door to sell you an energy deal...
- 4. a supplier salesperson tried to sell you an energy deal in the street...
- 5. a supplier tried to sell you an energy deal over webchat
- 6. one of your friends who work on behalf of an energy supplier tried to sell you an energy deal...

GENERIC ENDING

which, if any, of these words or phrases describe their sales approach?

SHOW SCREEN

Thinking about the last time <SUBSTITUTE IN BASED ON REPRE> by <your energy supplier/another energy supplier>, which, if any, of these words or phrases describe the <call/salesperson>?

1. Professional
1. Pushy
2. Friendly
3. Knowledgeable
4. Rude
5. Dishonest
6. Intimidating
7. I trusted what they had to say
8. The things they said were too good to be true
9. They listened to what I had to say
10. I don't believe what they told me
96. None of these
99. Don't know
98. Refused

Base: F2: Has gas and/or electricity supply and responsible for it

Q94

SINGLE CODE FOR EACH STATEMENT
DISLAY INTERVIEWER INSTRUCTION AT iii) ONLY

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.

- i) An annual summary or review (containing details about your own energy tariff and energy use)
- ii) At least one bill or direct debit \ repayment statement
- iii) A price increase notification letter
- iv) A letter informing you your fixed term tariff is coming to an end

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

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

Base: F47: Received annual summary

Q95

SINGLE CODE

SHOW SCREEN

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
- 98: Refused
- 99: Don't know

Base: F51: Received annual summary AND read it in detail/skimmed

Q96

SINGLE CODE
ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

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
- 98: Refused
- 99: Don't know

Base: F48: Received bill

Q99

SINGLE CODE

SHOW SCREEN

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
- 98: Refused
- 99: Don't know

Base: F52: Received bill AND read it in detail/skimmed

Q100

SINGLE CODE

ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

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
- 98: Refused
- 99: Don't know

Base: F49: Received PIN

Q103

SINGLE CODE

SHOW SCREEN

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
- 98: Refused
- 99: Don't know

Base: F53: Received PIN AND read it in detail/skimmed

Q104

SINGLE CODE

ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

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
- 98: Refused
- 99: Don't know

Base: F50: Received end of fixed term letter

Q107

SINGLE CODE

SHOW SCREEN

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
- 98: Refused
- 99: Don't know

Base: F54: Received end of fixed term letter AND read it in detail/skimmed

Q108

SINGLE CODE
ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

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
- 98: Refused
- 99: Don't know

Base: F2: Has gas and/or electricity supply and responsible for it

Q174

SINGLE CODE

SHOW SCREEN

Q.174 A Personal Projection is an estimated annual cost of a tariff, based on your expected energy use. Prior to this interview, have you seen a Personal Projection?

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

Base: F130: Aware of personal projection

Intro11

PLEASE TURN SCREEN AWAY FROM RESPONDENT

Base: F130: Aware of personal projection

Q175

MULTIPLE CODE

Q.175 And where did you see this?

INTERVIEWER INSTRUCTION: if respondent answers 5, 8, or 9, probe if this was actually either 1, 2, 3, or 4

1. Annual summary
2. Bill
3. Price increase letter
4. End of fixed term letter
5. On my energy supplier(s) website
6. On another energy supplier website
7. On another website
8. Via email
9. Via a leaflet or letter sent directly to you
10. Somewhere else (e.g. a newspaper article or advertisement)
97. Other

Base: F2: Has gas and/or electricity supply and responsible for it

Q120

MULTIPLE CODE SHOW AS GRID

ROTATE ORDER OF PRESENTATION OF ROWS

SHOW SCREEN

For which, if any, of the following services have you switched your provider in the last 12 months?

For each of :

- i: Mobile phone network
- ii: Internet or broadband provider
- iii: Current Account
- iv. Home insurance
- v. Car insurance

1. Yes I've switched
2. No I haven't
3. Not applicable because I don't have this product
98. DK
99. Refused

Base: F2: Has gas and/or electricity supply and responsible for it

Intro10

READ OUT

Now some questions about you and your household, so we can look at your answers alongside those of other people like you.

Base: F2: Has gas and/or electricity supply and responsible for it

Q128

SINGLE CODE

SHOW SCREEN

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 than once per month
- 5: Never - but I do have access
- 6: Never - and I do not have access
- 98: Refused
- 99: Don't know

Base: F2: Has gas and/or electricity supply and responsible for it

Onlin

MULTIPLE CODE

Which of the following do you personally own?

- 1. Mobile phone (capable of making calls and sending messages, but with no or limited access to internet or email)
- 2. Smartphone (can download apps and games via the internet, typically has a touchscreen)
- 3. Tablet
- 4. Laptop
- 5. Desktop PC
- 6. None of the above

Base: F2: Has gas and/or electricity supply and responsible for it

Q129

SINGLE CODE

SHOW SCREEN

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

INTERVIEWER INSTRUCTION: If 'Yes', probe - "Is English the only language you speak or do you speak any other language?"

- 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
- 98: Refused
- 99: Don't know

Base: F2: Has gas and/or electricity supply and responsible for it

Q130

SINGLE CODE

SHOW SCREEN

What is the highest level of education you have completed? Please select one answer only.

- 3: Professional qualifications
- 1: Post graduate degree (MA, MSc, PhD etc.)
- 2: Degree
- 4: HND/HNC
- 7: ONC/OND/City & Guilds



8: GNVQ
5: A Levels\AS Levels
6: GCSE\O Levels\CSE
96: None
98: Refused
99: Don't know

Base: F2: Has gas and/or electricity supply and responsible for it

Q131

MULTIPLE CODE

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? This includes problems due to old age.

INTERVIEWER INSTRUCTION: Multiple code as many as apply

- 1: Yes, I do
- 2: Yes, my husband\wife\partner does
- 96: No, no-one
- 98: Refused
- 99: Don't know

Base: F110 Respondent or spouse/partner with long term limiting illness/disability

Disa2

ASK FOR EACH PERSON IDENTIFIED AT Q131

MULTIPLE CODE

SHOW SCREEN

If code 1 at Q131:

Which of these best describes your impairment, illness or disability?

If code 2 at Q131

Which of these best describes your spouse/ civil partner/ partner's impairment, illness or disability?

PLEASE SELECT ALL THAT APPLY

- 1. Visual impairment
- 2. Other difficulties reading, speaking or understanding English
- 3. Hearing impairment
- 4. Mobility impairment
- 5. Mental health problems
- 6. Learning difficulties
- 97. Other health problem or disability
- 96. None of these
- 99. Don't know
- 98. Prefer not to answer

Base: F2: Has gas and/or electricity supply and responsible for it

Q132

SINGLE CODE

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? This includes caring for relatives with problems due to old age.

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

Base: F2: Has gas and/or electricity supply and responsible for it

Q133

SHOW INCOME CARD

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.

G: Under £100 \ Under £400 \ Under £5,000
 B: £100 - £199 \ £400 - £829 \ £5,000 - £9,999
 F: £200 - £308 \ £830 - £1,333 \ £10,000 - £15,999
 I: £309 - £389 \ £1,334 - £1,649 \ £16,000 - £19,999
 D: £390 - £489 \ £1,650 - £2,099 \ £20,000 - £24,999
 C: £490 - £679 \ £2,100 - £2,899 \ £25,000 - £34,999
 A: £680 - £869 \ £2,900 - £3,749 \ £35,000 - £44,999
 J: £870 - £1,149 \ £3,750 - £4,999 \ £45,000 - £59,999
 H: £1,150 - £1,549 \ £5,000 - £6,649 \ £60,000 - £79,999
 E: £1,550 or over \ £6,650 or over \ £80,000 or over
 SPONTANEOUS ONLY: Nothing\no work or scheme
 98: Refused
 99: Don't know

Base: F55: "Nothing\no work or scheme" or don't know income or refused income

Q134

SINGLE CODE

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?

INTERVIEWER INSTRUCTION: If the respondent has a partner we would like their combined income.

1: Less than £16,000
 2: £16,000 or more
 98: Refused
 99: Don't know

Base: F2: Has gas and/or electricity supply and responsible for it

WelBi

SINGLE CODE

ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

Which one of the following statements best describes how well you are keeping up with your bills and credit commitments at the moment?

Please include those you have personally or jointly with a partner or spouse

PLEASE SELECT ONE ONLY

1. I am / we are keeping up with all bills and commitments without any difficulties
2. I am / we are keeping up with all bills and commitments, but it is a struggle from time to time
3. I am / we are keeping up with all bills and commitments, but it is a constant struggle
4. I am / we are falling behind with some bills or credit commitments
5. I am / we are having real financial problems and have fallen behind with many bills or credit commitments
6. I / we don't have any bills or credit commitments
99. Don't know
98. Refused

Base: F2: Has gas and/or electricity supply and responsible for it

Arrea

SINGLE CODE

SHOWSCREEN

In the last twelve months, has the household been in arrears on your gas or electricity bills. That means that you have been unable to pay on time because of financial difficulties.

- 1 Yes, once
- 2 Yes, twice or more
- 3 No
- 98: Refused
- 99: Don't know

Base: F2: Has gas and/or electricity supply and responsible for it

Q135

SINGLE CODE

Have you moved house in the last 12 months?

- 1: Yes - once
- 2: Yes - more than once
- 3: No
- 98: Refused
- 99: Don't know

Base: F2: Has gas and/or electricity supply and responsible for it

Proper

MULTIPLE CODE

SHOW SCREEN

Which, if any, of these do you have at this property ?

CODE ALL THAT APPLY

- 1. Solar panels to generate electricity
- 2. Solar water heating
- 3. Wind turbine
- 4. Micro-hydropower system
- 5. Micro CHP boiler (boiler that also generates electricity)
- 97. Other (specify)
- 96. None of these
- 99. Don't know
- 98. Refused

Base: F2: Has gas and/or electricity supply and responsible for it

Age

TAKE NUMERIC AGE. IF REFUSED CODE INTO BANDS BELOW
NUMERIC RANGE 16-100

What is your age?

Base: F2: Has gas and/or electricity supply and responsible for it

AGEBAND

DO NOT ROTATE

What is your age?

1. 16-24
2. 25-34
3. 35-44
4. 45-54
5. 55-64
6. 65-74
7. 75-84
8. 85+
9. Prefer not to say

Base: F2: Has gas and/or electricity supply and responsible for it

Gender

DO NOT ROTATE

What is your gender?

1. Male
2. Female
3. Other
4. Prefer not to say

Base: F2: Has gas and/or electricity supply and responsible for it

Ethnicity

DO NOT ROTATE

Which of these groups do you consider you belong to?

1. White English/Welsh/Scottish/Northern Irish/British
2. Irish
3. Gypsy/Irish Traveller
4. Any other White background
5. White and Black Caribbean
6. White and Black African
7. White and Asian
8. Any other mixed/multiple ethnic group
9. Indian
10. Pakistani
11. Bangladeshi
12. Chinese
13. Any other Asian background
14. African
15. Caribbean
16. Any other Black/ African/ Caribbean background
17. Arab
18. Any other ethnic group
19. Prefer not to say

Base: F2: Has gas and/or electricity supply and responsible for it

Marital

DO NOT ROTATE

SHOWSCREEN

Which of these best applies to you personally?

1. Single
2. Married / in a legally recognised civil partnership
3. Living as a couple
4. Widowed
5. Divorced
6. Separated
7. Prefer not to say

Base: F2: Has gas and/or electricity supply and responsible for it

Adults1

How many ADULTS aged between 16 and 64 are there in your household?

ENTER NUMBER

Base: F2: Has gas and/or electricity supply and responsible for it

Adults2

How many ADULTS aged 65 or older are there in your household?

ENTER NUMBER

Base: F2: Has gas and/or electricity supply and responsible for it

Child1

Are there any CHILDREN UNDER 16 in the household?

1. Yes
2. No
3. Don't know
4. Prefer not to say

Base: F2: Has gas and/or electricity supply and responsible for it

Tenure

DO NOT ROTATE

SHOW SCREEN AND READ OUT

Please tell me whether your home is...

1. Being bought on a mortgage
2. Owned outright by household
3. Rented from Local Authority
4. Rented from private landlord
5. Rented from Housing Association
6. Other

Base: F2: Has gas and/or electricity supply and responsible for it

Work

DO NOT ROTATE

SHOWSCREEN

Are you...

1. Employed or self employed full time (30+ hours)
2. Employed or self employed part time (8-29 hours)
3. Employed or self employed part time (<8 hours)
4. Retired
5. Still at school
6. In full time higher education
7. Unemployed and seeking work
8. Not employed and not seeking work
9. Don't know
10. Prefer not to say

Base: F2: Has gas and/or electricity supply and responsible for it

Socialgrade

USE STANDARD SOCIAL GRADE QUESTION SET FOR FACE-TO-FACE SURVEYS

I would now like to ask you about the member of your household who is the Chief Income Earner; that is the person with the largest income, whether from employment, pensions, state benefits, investments or any other source.

Are they/you ...

1. Working
2. Retired/Not working with private pensions/means
3. Unemployed less than 6 months

4. Unemployed more than 6 months
5. Retired with STATE BENEFIT/PENSION ONLY
6. Not working with STATE BENEFIT ONLY
7. Student

Take respondent as Chief Income Earner, e.g. flat sharer etc

Job Title

Job Description

Industry

Number employed at location

Qualifications

If Manager/Supervisor/Self-Employed, Number of people responsible for

NOTE THAT WE HAVE SEPARATE QUESTIONS FOR THIS PRE PROGRAMMED - WE HAVEN'T SET THEM OUT HERE BUT THE ABOVE IS A SUMMARY

1. A
2. B
3. C1
4. C2
5. D
6. E

Base: F2: Has gas and/or electricity supply and responsible for it

Q136

SINGLE CODE

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

Base:

After

Take contact details – name, address, tel number and email address

5.3 Full list of filters used in 2017

Filter No.	Description	Definition	Full filter description
F0 All respondents	All respondents	[All]	F0: All respondents
F1	Has gas and/or electricity supply	[Q1=1] OR [Q1=2] OR [Q1=3]	F1: Has gas and/or electricity supply
F2	Has gas and/or electricity supply and responsible for it	[Q2=1]	F2: Has gas and/or electricity supply and responsible for it
F3	Has gas only supply and responsible for it	[Q1=1 AND Q2=1]	F3: Has gas only supply and responsible for it
F4	Has electricity only supply and responsible for it	[Q1=2 AND Q2=1]	F4: Has electricity only supply and responsible for it
F5	Has gas and electricity supply and responsible for it	[Q1=3 AND Q2=1]	F5: Has gas and electricity supply and responsible for it
F6	Has different gas and electricity suppliers, or not sure if the same	[Q150=2] OR [Q150=98] OR [Q150=99]	F6: Has different gas and electricity suppliers, or not sure if the same
F7	Has gas and electricity supply from the same supplier and responsible for it	[Q150=1]	F7: Has gas and electricity supply from the same supplier and responsible for it
F42	All who spend something on home energy	[Q8 >£0]	F42: All who spend something on home energy
F45	Not made complaint in past 12 months to current or previous supplier	[Q76=2] OR [Q76=98] OR [Q76=99]	F45: Not made complaint in past 12 months to current or previous supplier
F47	Received annual summary	[Q94ii=1]	F47: Received annual summary
F48	Received bill	[Q94iii=1]	F48: Received bill
F49	Received PIN	[Q94iv=1]	F49: Received PIN
F50	Received end of fixed term letter	[Q94v=1]	F50: Received end of fixed term letter
F51	Received annual summary AND read it in	[[Q95=1 OR Q95=2] AND [F47]]	F51: Received annual summary AND read it in detail/skimmed

Filter No.	Description	Definition	Full filter description
	detail/skimmed		
F52	Received bill AND read it in detail/skimmed	[[Q99=1 OR Q99=2] AND [F48]]	F52: Received bill AND read it in detail/skimmed
F53	Received PIN AND read it in detail/skimmed	[[Q103=1 OR Q103=2] AND [F49]]	F53: Received PIN AND read it in detail/skimmed
F54	Received end of fixed term letter AND read it in detail/skimmed	[[Q107=1 OR Q107=2] AND [F50]]	F54: Received end of fixed term letter AND read it in detail/skimmed
F55	"Nothing\ no work or scheme" or don't know income or refused income	[Q133=11] OR [Q133=98] OR [Q133=99]	F55: "Nothing\ no work or scheme" or don't know income or refused income
F101	Have gas and electricity from same supplier and pay for them both in the same way (e.g. direct debit, on receipt of bill only)	[F7] AND [[Q5=1 AND Q6=1] OR [Q5=2 AND Q6=2] OR [Q5=3 AND Q6=3]]	F101 have gas and electricity from same supplier and pay for them both in the same way (e.g. direct debit, on receipt of bill only) (codes 1 or 2 or 3 at Q.5 and Q.6)
F102	Switched using price comparison site	[Q165=1]	F102 Switched using price comparison site
F106	Tried to switch but unable to at New17	[Tried = 1]	F106 Tried to switch but unable to
F107	Approached by salesperson at Repra (marked with * in answer list)	[Repra = 1] or [Repra = 2] or [Repra = 3] or [Repra = 4] or [Repra = 5] or [Repra = 6]	F107 Approached by salesperson from own or other energy company
F108	Shopped around in energy market but not switched supplier or tariff in P12M, or not shopped around in energy market at all in P12M	[Dummsset<>1,2,3,4,5 or 6]	F108 Shopped around in energy market but not switched supplier or tariff in P12M, or not shopped around in energy market at all in P12M
F109	Someone else in household with long term limiting illness/disability at Q131	Q131=2	F109 Someone else in household with long term limiting illness/disability at Q131
F110	Respondent or spouse / partner has long term limiting illness/disability (Q131)	Q131=1 or 2	F110 Respondent or spouse/partner with long term limiting illness/disability

Filter No.	Description	Definition	Full filter description
F111	Aware of smart meters	[SM1 = 1]	F111 Aware of smart meters
F112	Ever switched gas supplier	[Q21 = 1] or [Q21 = 2] OR [Q21 = 3] OR [Q21 = 4] OR [Q21 = 5]	F112 Ever switched gas supplier
F113	Ever switched electricity supplier	[Q22 = 1] OR [Q22 = 2] or [Q22 = 3] OR [Q22 = 4] OR [Q22 = 5]	F113 Ever switched electricity supplier
F114	Switched gas and electricity supplier in past 12 months	Q138=1 and Q139 =1	F114 Switched gas and electricity supplier in past 12 months
F115	Ever switched gas tariff	[TmesG = 1] or [TmesG=2] or [TmesG = 3] or [TmesG =4] or [TmesG =5]	F115 Ever switched gas tariff
F116	Ever switched electricity tariff	[TmesE = 1] or [TmesE=2] or [TmesE = 3] or [TmesE =4] or [TmesE =5]	F116 Ever switched electricity tariff
F117	Switched gas and electricity tariff in past 12 months	WhnSG=1 and WhnSE =1	F117 Switched gas and electricity tariff in past 12 months
F118	Switched gas or electricity supplier or tariff, or compared suppliers or tariffs in the past 12 months	[Dummset=1] or [DummSet=2] or [DummSet=3] or [DummSet=4] or [DummSet=5] or [DummSet=6] or [DummSet=7] or [DummSet=8] or [DummSet=9] or [DummSet=10]	F118 Switched gas or electricity supplier or tariff, or compared suppliers or tariffs in the past 12 months
F119	Gave more than one response at Q160	Coded 2 or more codes at Q160	F119 Gave more than one response at Q160
F120	Recommendations made at Recom	[Recom = 1] or [Recom = 2] or [Recom = 3]	F120 Recommendations made at Recom
F121	Gave more than one response at Q122	Coded 2 or more codes at Q122	F121 Gave more than one response at Q122
F123	Switched gas or electricity supplier or	[DummSet=1] or [DummSet=2] or	F123 Switched gas or electricity supplier or tariff in past 12

Filter No.	Description	Definition	Full filter description
	tariff in past 12 months	[DummSet=3] or [DummSet=4] or [DummSet=5] or [DummSet=6]	months
F124	Switched gas or electricity supplier in past 12 months	[DummSet=1] or [DummSet=2] or [DummSet=3]	
f125	Thought they would save money from the switch	Q166 = 1 or Q166 = 2	F125 Thought they would save money from the switch
F126	Owed balance from old supplier when last switched'	OwedM = 1	F126 Owed balance from old supplier when last switched
F127	Cause to complain but did not complain	q81 = 1	F127 Cause to complain but did not complain
F128	Have received information about your energy consumption or use in P12M at Q94	Q94 = 1	F128: Have received information about your energy consumption or use in P12M at Q94
F129	Says they have a smart meter	[SM4=1]	F129: Says they have a smart meter
F130	Aware of personal projection	Q174 =1	F130: Aware of personal projection
f133	NOT Switched gas or electricity supplier or tariff, or compared suppliers or tariffs in the past 12 months	Dummset = 96	F133:NOT Switched gas or electricity supplier or tariff, or compared suppliers or tariffs in the past 12 months

5.4 Qualitative discussion guide

Research objectives:

- Gather detailed insight into the views and behaviours of the 6 segments
- Collect visual materials to support the report/ bring the quantitative research findings to life

Note: please note that this discussion guide is intended to guide the discussion only. Therefore, not all questions will necessarily be asked, or in the exact wording or order shown.

1. Introductions

5 mins

- Thank you for agreeing to take part
- Reminder: you recently took part in a survey for GfK about gas and electricity suppliers. This survey was on behalf of Ofgem. We'd like to talk about some of these things with you a little more detail – this is an opportunity to have more of a chat about your views and experiences.
- Introduce self and GfK
- Reassure re confidentiality and MRS code of conduct
- Explain audio –recording, transcript, filming the interview, photographs and vox pops – we will ask you again at the end of the discussion to check that you are happy with this and sign a form to clarify exactly how any of these things will be used.
- Discussion will last 1 hour
- Any questions?

Participant introduction/ recap on information gathered during survey:

- First name
- How do you spend your time? Work, hobbies etc.?
- Who lives here with you? Family?
- How long have you lived in your home?
- What technology do you tend to use in your home e.g. laptop / tablet / smartphone / desktop?
- Do you have gas and/ or electricity? Who supplies this?

Moderator: please familiarise yourself with the participant's segment before the interview, and adjust focus of questioning accordingly, noting key questions.

Moderator: please take care to reflect participant language throughout. Refer to participant survey data before the interview for context. Use this discussion guide flexibly dependent on the needs / circumstances of each participant.

2. My purchasing habits

10 mins

I'd like to start by asking a little about any service that you have renewed recently (other than energy). Please take a moment to think about the last service (except gas or electricity) that you have renewed.

If you haven't renewed a service, have you signed up for one for the first time? If not signed up for / renewed a service, have you made a major purchase?

Moderator: major purchase could include car, holiday, electrical / electronic item, household appliance, other high value item. Major service could include banking, insurance, TV, mobile, broadband, mortgage. Please note that in some cases these may be bundled.

Please tell me a bit about what you wanted to buy ...

- What was this?
- What made you initially decide to buy this?
- What were the main things you looking for in choosing an item / service?

Talk me through how you went about this purchase ...

Moderator probe as appropriate –

- How did you go about choosing what to buy / which supplier / brand to go for?
 - How did you feel about choosing which item / service to buy?
 - How long did this take?
 - How much effort did this take?
- To what extent did you shop around? Tell me a bit about this.
 - How did you feel about shopping around?
 - What are the main reasons you shop around?
 - What are the things that prevent you from shopping around?
- Which information did you use to help you make your choice?
 - Who / which sources did you consult? *Do you have any of this information available to hand to show me as we discuss this?*
- How easy or difficult was it to make your choice? Why?
 - Which aspects were more easy?
 - Which aspects were more difficult?

Can you tell me a bit about your feelings when you were buying this / thinking about buying this?

- Please have a look at the *Wordle* which includes some feelings you might have about making a purchase. Please choose 3 that best describe your feelings about this purchase. Tell me a bit about why you have chosen these words.
 - How *confident* did you feel when you were making this purchase?
 - How much *control* did you feel that you had over the way you made this purchase?

How typical was the process you have described, compared with how you usually go about making a major purchase / renewing a service?

- How do you normally feel when renewing a service /making a major purchase like this?
- How would you describe your usual approach to renewing services / making major purchases?
- Which information do you tend to use to help you make your choice?
- *Optional – if time:* Have a look at the *blob tree*. Which of these characters represents the way that you usually feel when renewing a service /making a purchase like this? Why do you say that?

- What do your friends / family say about the way that you tend to go about this? Why do they say this?
- (If you were discussing renewing a service) what about major purchases? Try to think of an example.
- (If you were discussing a major purchase (what about a service renewal? Try to think of an example)
 - How is this different? Why?
 - Do you feel differently about this? Why?

Moderator: explore drivers / barriers to each...

- How confident do you tend to feel?
 - Tell me a bit about how this affects you.
- How *in control* do you tend to feel?
 - Tell me a bit about how this affects you.
- To what extent do you shop around / make comparisons?
- How easy or difficult is it to shop around / make comparisons? What are the effects of this?
- How much *time and effort* do you tend to expend on making the right choice?
- How much *information* do you tend to look for before you make your choice?
- How *easy or difficult* do you tend to find making choices like this?
- Which aspects are more easy / difficult?

3. Switching energy supplier

25 mins

I'd now like to think about how you feel about choosing which gas or electricity supplier or deal/tariff to go for.

Please tell me a bit about your current gas / electricity supplier

- Who provides your gas and / or electricity at the moment?
 - How did you come to be with this provider?
- Do you know the name of the deal / tariff that you have at the moment?
 - How did you come to sign up for the deal / tariff that you have at the moment?
- Please tell me a bit about how you manage your gas and / or electricity bills at the moment
 - Payment methods
 - Monitoring usage / providing readings
- How is the way that you manage gas and / or electricity bills similar or different to other services you pay for? Why is this?
- How much do you know about the amount of gas and / or electricity that you use?
 - How do you know this?
 - How important is this to you?
- Do you try to make changes to how much gas and / or electricity you use day to day?
 - Do you try to cut down your energy use? Reasons for this?
 - Tell me a bit about how you manage this
- When do you tend to be in contact with your energy supplier
 - Routine contact
 - Enquiries / support
 - Have you contacted them about an issue / concern / problem?
- How happy would you say you are with the deal that you have at the moment? Why / not?
- To what extent are you confident that you are on the best deal possible for you at the moment? Why / not?

I'd like to ask you a bit about getting a new gas / electricity deal or supplier

- Is this something that you have done in the last 12 months?

SWITCHERS / CONSIDERERS

Tell me a bit about why you decided to get a new deal / supplier...

- What did you want to change about your existing deal / supplier? *Probe: customer service, price, preventing price rises.*
- What were you looking for in a new deal / supplier? *Probe: customer service, price, preventing price rises, brand reputation, incentives, bundled services.*
 - NB: If says “to save money” – probe to understand if avoiding a price rise (e.g. at end of contract would flip to standard variable or because of supplier price rise), or because realised could *reduce* bills)
- What prompted you to think about getting a new deal?
 - Self-motivated e.g. by ‘habit’ when your contract came to an end?
 - Information / advice from others (e.g. media, suppliers, marketing, social media)
- Did you see any specific information that encouraged you to think about a new deal / supplier? *Probe: annual statement, bills, end of fixed term notice, supplier advertising, other advertising, price comparison websites consumer affairs media / brands*

ASK ALL

I'd like to ask you now how you *feel / felt* about getting a new deal / supplier for gas and / or electricity...

- How often do you tend to think about this topic?
 - What triggers you to think about this?
 - And what do you do when you think about this?
 - What encourages you / prevents you from taking any action?
- How easy or difficult is it to choose a new deal / provider?
 - What makes it easier?
 - What makes it more difficult?
- How does this issue tend to make you feel?
 - What comes to mind when I mention the word ‘switching’?
 - What feelings do you associate with this?
- Have a look at the *blob tree*. Which of these characters represents the way that you feel about this issue? Why do you say that?

Moderator: explore drivers / barriers to each...

- How confident do you feel about this?
 - What are the effects of this?
- How *in control* do you feel about this?
 - What are the effects of this?
- Have a look at the *statements* (see *showcards*) describing how some people feel about this issue. To what extent do you agree with these? *Explore impact on behaviour.*

I'd now like to ask you a bit about your approach to changing to a new supplier / tariff

SWITCHERS / CONSIDERERS

- Tell me a bit about how you went about choosing which supplier / deal to go for...

Moderator ask participant to talk through timeline/ order of activities and probe as appropriate –

- How did you go about choosing/ looking around for a new supplier / tariff?
 - How did you feel about choosing a supplier / tariff?
 - How long did this take?

- How much effort did this take?
- To what extent did you shop around? Tell me a bit about this.
 - How did you feel about shopping around?
 - What are the main reasons you shop around?
 - What are the things that prevent you from shopping around?
 - How easy or difficult is it to shop around in this market?
- Which information did you use to help you make your choice?
 - Who / which sources did you consult? *Do you have any of this information available to hand to show me as we discuss this?*
- How easy or difficult was it to make your choice? Why?
- Which aspects were more easy / difficult?
- Who else, if anyone, was involved? (e.g. partner/ family/ other). *Did you ask anyone for help or recommendations or did anyone give you some helpful information?*
- Did you ultimately sign up for a new deal? Why / not?
 - **Moderator note: key question for considerers:**
 - **Probe CONSIDERERS: what would have needed to be different for you to sign up for the deal?** *Identify key barriers and explore in detail, e.g.:*
 - Risks – something going wrong
 - Hassle factor (what is hassle in the context of their life?)
 - Fear that switching isn't worth it?
 - Distrust of market/ suppliers/ expected savings
 - Other fears/ concerns?
 - If this factor had been different, do you really think that you would have acted differently? Why / why not?
 - Of the various reasons you have given me, what's the most important one?

DONE NOTHING:

- Have you ever considered switching your tariff/ supplier?
 - Why/ why not?
- To what extent is switching tariff/ supplier easy / difficult?
 - Why do you say this?
 - What might get in the way of someone switching tariff/ supplier?
 - Why might someone not get around to switching tariff/ supplier?
- What would be the benefits to switching tariff/ supplier?
 - Why would this be a benefit?
 - NB: If says “to save money” – probe to understand if avoiding a price rise (e.g. at end of contract would flip to standard variable or because of supplier price rise), or because realised could *reduce* bills)
 - Would this encourage you to switch tariff/ supplier?
- What would be the drawbacks to switching tariff/ supplier?
 - Why would this be a drawback?
 - Would this discourage you from switching tariff/ supplier?
- What are the risks to switching tariff/ supplier?
 - Why would this be a risk?
 - Would this discourage you from switching supplier?
- **Moderator: key question**
- In what circumstances would you think about looking into a new energy supplier or tariff?
 - What would need to change?
 - If this factor had been different, do you really think that you would have acted differently? Why / why not?

- Of the various reasons you have given me, what's the most important one?

I'd like you to think about how you would be likely to go about it if you did decide to look into getting a new energy supplier. This should be how you think you would really do this. *Moderator probe as appropriate*

- How would you go about choosing which supplier / tariff to go for?
 - How did you feel about choosing a supplier / tariff?
 - How much time would it be likely to take?
 - How much effort would it be likely to take?

Moderator: key question for segment 5 in particular:

- What would you be looking for in a new energy supplier *Probe: customer service, price, preventing price rises, brand reputation, incentives, bundled services.*
 - NB: If says "to save money" – probe to understand if avoiding a price rise (e.g. at end of contract would flip to standard variable or because of supplier price rise), or because realised could *reduce* bills)
- To what extent would you shop around? Tell me a bit about this.
 - How do you feel about shopping around?
 - What are the main reasons you shop around?
 - What are the things that prevent you from shopping around?
 - How easy or difficult is it to shop around in this market?
- Which information would you use to help you make your choice?
 - Who / which sources would you consult?
- How easy or difficult would it be to make your choice? Why?
 - Which aspects are more easy?
 - Which aspects are more difficult?

ASK ALL

How does this compare with how you would go about buying other types of products / services?

- What is similar / different and why?
- How do you feel about renewing your gas and / or electricity deal compared with other services (e.g. mobile phone, landline, broadband)
 - Is gas and / or electricity easier or more difficult? Why?
 - Do you approach this differently than for other services? Why?
 - Shopping around
 - Looking for information / advice
 - Is it more or less worthwhile to try to get the best deal in gas and / or electricity, compared with other services? Why do you say that?
 - Do you tend to spend more / less time trying to find the best deal in gas and / or electricity Why?
 - Do you trust the suppliers more or less in gas and / or electricity than other services? Why?

SWITCHERS

- Once you had made your decision about switching, what happened next?
- How did you go about actually making the switch?
- How easy/ difficult was this process?
- How does this compare to other times when you have switched a supplier in the past (for energy or something else)?

CONSIDERERS/ HAVE DONE NOTHING

- Have you previously switched supplier/ tariff?
 - If yes, what was this experience like?

4. Attitudes to energy suppliers and price comparison websites **10 mins**

I'd now like to ask you a bit about your energy suppliers

- How satisfied are you with your current supplier overall? Why/ not?
 - Likes?
 - Problems?
 - What else would you like them to do for you?
- To what extent would you say that your energy supplier is... *Moderator: please explore reasons e.g. personal experience, word of mouth, general perceptions.*
 - Trustworthy?
 - Helpful?
 - Provides clear information to you?
 - Charges a fair price?
 - Treats you fairly in their dealings with you? (*Moderator: only provide examples if customer cannot self-define 'treating you fairly' E.g. price increases, deals coming to an end.*)
 - Is fair and transparent in their selling/advertising?
 - Which other words would you choose to describe them? Why?
- How would you compare the service that you receive from them to...
 - Your bank?
 - Your broadband / phone supplier?
 - *Moderator: any problems, please explore these experiences*

I'd now like to ask you a bit about energy suppliers in general

- When I talk about 'energy suppliers', which brands do you think of?
- What do you think about suppliers in this market in general?
- If you imagine the world of brands / services as an animal park, which animal would represent energy suppliers?
- To what extent would you say that energy suppliers are... *Moderator, for each characteristic, check how their perception compares with their own supplier:*
 - Trustworthy
 - Helpful
 - Provide clear information
 - Charge a fair price
 - Treats you fairly in their dealings with you
 - Are fair and transparent in their selling/advertising
 - Which other words would you choose to describe them?

I'd now like to ask you a bit about price comparison websites (PCWs)

- To what extent do you make use of comparison websites?
 - Tell me about the last time you used one of these.
 - Which price comparison website (s) have you previously used?
 - How many have you used? If multiple, probe on why use more than one
 - When have you used these? What kinds of products and services? First time purchase or renewal?
 - How do you tend to use these?

- Along with other information? How do you use these in conjunction with other information?
- At what stage do you tend to look at a price comparison website? Why?
- How do you feel about PCWs?
 - Why?
 - Would you say you are positive, neutral or negative about PCWs? Why?
 - Generally speaking, what has been your experience of PCWs?

Thinking specifically about using PCWs in the energy market

- To what extent would you say that PCWs are...
 - Trustworthy
 - Helpful
 - Which other words would you choose to describe them?
- To what extent have you used PCWs to switch energy supplier?
 - *Moderator: please explore any experiences understanding when and how PCWs were used*
- What are the advantages / disadvantages of using PCWs when looking at energy suppliers?
- Do they have all of the available deals on offer?
 - *Moderator: explore responses here – is this based on experiences or something else?*
- Are they biased? Why do you say that? How does that affect how you use PCWs?
- Is it clear how they calculate the savings on offer?
 - How do you feel about this? Why?
 - How does this affect how you use PCWs?

5. Summary, photos and vox-pops

10 mins

Thank you very much for your help so far. I'd like to spend the rest of the time filming some vox-pops and taking some photos of you and your home

Moderator please obtain written consent for filming of full interview, vox-pops and photos, and passing these to Ofgem.

Vox-pops:

- Ask participant to speak to camera on 2-3 key issues covered during the interview

Photos:

- Respondent in home setting
- Relevant backdrops e.g. information searching, paperwork, media etc.