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Appendix 1: Sample/Quotas





Quota achieved

Completes achieved by trial arm and outcome...

| | Switched Internally | Switched Externally | Did Nothing |
|--|---------------------|---------------------|-------------|
| T1:External only/letter/no reminder | 4 | 7 | 2 |
| T2:External only/letter/reminder | 1 | 2 | 2 |
| T3:Internal/letter/ no reminder | 2 | 5 | 2 |
| T4:Internal/letter/reminder | 1 | 2 | 2 |
| T5:External only/email/no reminder | 4 | 5 | 4 |
| T6:External only/email/reminder | 1 | 2 | 0 |
| T7:Internal/email/no reminder | 4 | 4 | 3 |
| T8:Internal/email/reminder | 1 | 1 | 3 |
| Two CMOCS | | 2 | |

Completes achieved by supplier...

Large supplier 1 and 2

22 interviews each

Medium supplier 2

13 interviews

10 interviews

Medium supplier 1



Quota achieved

Completes achieved by supplier

| | Medium supplier 1 | Large supplier 1 | Large supplier 2 | Medium supplier 2 |
|--|-------------------|------------------|------------------|-------------------|
| T1:External only/letter/no reminder | 3 | 3 | 4 | 3 |
| T2:External only/letter/reminder | N/A | 3 | 3 | N/A |
| T3:Internal/letter/no reminder | 2 | 3 | 1 | 3 |
| T4:Internal/letter/reminder | N/A | 3 | 2 | N/A |
| T5:External only/email/no reminder | 3 | 4 | 3 | 3 |
| T6:External only/email/reminder | N/A | 1 | 2 | N/A |
| T7:Internal/email/no reminder | 2 | 2 | 3 | 4 |
| T8:Internal/email/reminder | N/A | 2 | 3 | N/A |
| Two CMOCS | N/A | 1 | 1 | N/A |



Quotas achieved

Age



25-34:
4



35-44:
12



45-54:
14



55-64:
15



65+:
22

Gender

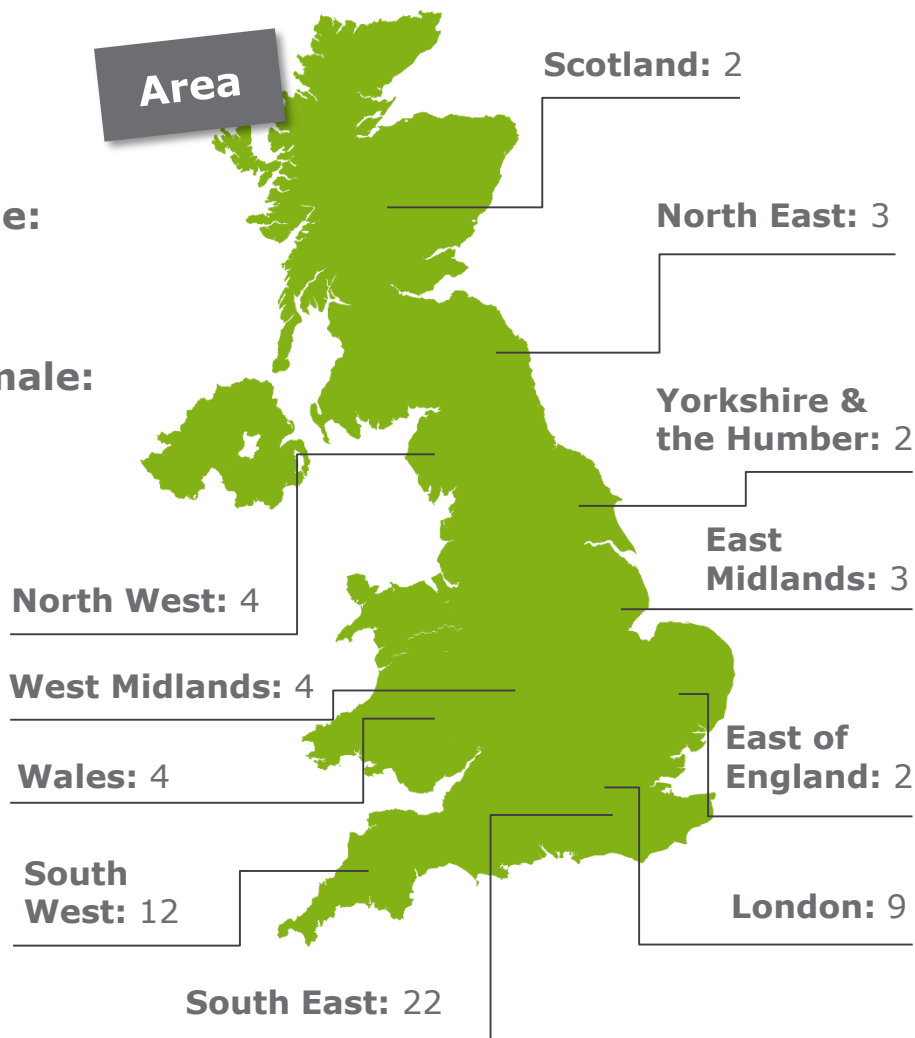


Male:
41



Female:
26

Area



All are sole/joint bill payers.

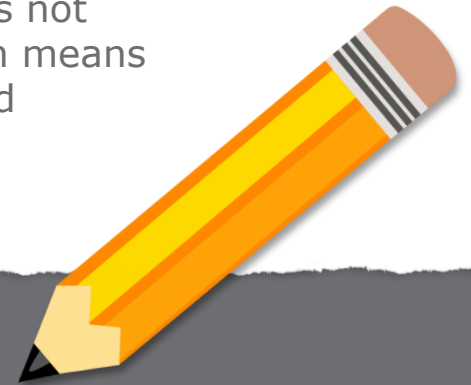
A note on sampling & data



This was **qualitative** research with an emphasis on **understanding** rather than **measuring**.

However, the inclusion of some structured questions does mean that we can provide *some* indicative measurement. This needs to be interpreted carefully:

1. Any figures provided are not statistically robust, and do not constitute a representative customer view.
2. It should also be remembered that as well as not having sufficient numbers to provide statistically robust data, the sample is not necessarily 'representative'. The *quota sampling* approach means that we specifically selected participants that fitted agreed criteria.



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Appendix 2: Methods of switching





Methods of switching

Just over half decided to switch over the phone while just under half did so online. Most of those switching changed both their electricity and gas with just a handful switching electricity and a few switching gas.

**Switched
by phone**

51%

Main reasons for this include:

- They feel more comfortable and trusting when speaking to someone on the phone.
- They like to feel reassured and use the opportunity to ask questions.
- They are digitally disenfranchised or unconfident using a computer.

Most likely to be a T1:External only/letter/no reminder or T5:External only/email/no reminder trial arm and to be supplied by Large supplier 1 or Large supplier 2.

Most likely to be over 55.

Most likely to receive a letter.



Methods of switching

Just under half decided to switch online. Many of these customers switched online immediately after researching the company.

**Switched
online**

49%

- Prefer to switch in their own time and at their own pace.
- Feel confident online/habit.
- Prefer to read information for themselves rather than listen to it.
- Don't like the idea of waiting on hold.
- Usually more convenient and they tend to have less time to spare.
- A minority had help from family.

**Most likely to
be a
T7:Internal/email
/no reminder or
T8:Internal/email
/reminder
trial arm**

**Three quarters
were under 65**

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Appendix 3: Reflection





Confidence in their decision to switch

Around two thirds believe they got the cheapest deal they could with a handful uncertain as they haven't been with them very long - or admitting they probably didn't but that was usually due to wanting to stay with the same supplier or not searching harder.



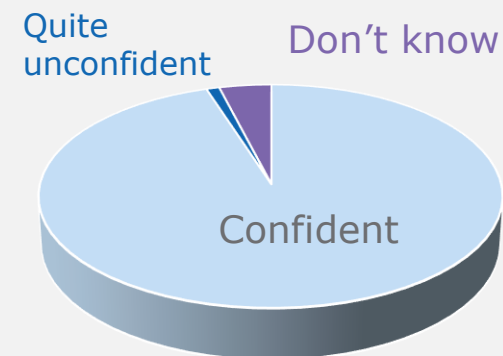
"Overall we will be saving a couple of hundred pounds a year."

T7:Internal/email/no reminder, switched externally, Large supplier 1

"Because they've always done what they've said they'd do. The transition went smoothly. They've already sent a man to check the readings and they seem to be on the ball."

T6:External only/email/reminder, switched externally, Large supplier 2

How confident are you that your decision to switch was a good decision?



Customers are confident in their decision to switch because: they believe that they got the best deal they could, they are saving money, they have had a positive experience communicating with their new supplier so far and the process of switching itself was very simple.



Happiness with the switch so far

Less than 10 customers switched just one fuel source with the majority of those choosing to switch their electricity.



"Easy to log on, use and the right price. Good customer support. No problems yet."

T7:Internal/email/no reminder, switched externally, Large supplier 2

"It worked perfectly, there were no issues at all."

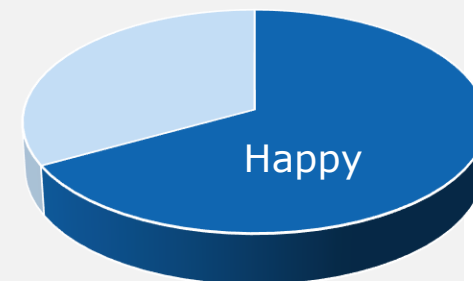
T5:External only/email/no reminder, switched externally, Medium supplier 1

"It was easier. I completed it online. All I did was give them my meter reading and got a letter to say I was set up."

T3:Internal/letter/ no reminder, switched externally, Large supplier 2

How happy or unhappy have you been with the switch?

Too early to tell



Happy customers feel that the process was quick and easy, there were no issues or everything ran smoothly. Some feel that they were 'blind' to the switch as it all happened with minimal involvement from them, something which pleased most people.



Future likelihood of switching...

Almost two thirds would be likely to search and compare energy suppliers for a better deal in the future, and over a third of those said the communications they received played an important role in this.

Likelihood to search and compare energy suppliers is relatively high due to:

- The realisation that it is not as daunting a task as it seems.
- The process is relatively easy.
- They could be saving a lot more money.

"Just to make sure that I am getting value for money. The email brought it forward in my mind, and made me realise that it is something to keep on top of."

T1:External only/letter/no reminder, Did nothing, plan to, Medium supplier 2

The role of the communication had a positive impact:

- It helped in making the switching process easier.
- It saved them time.
- It saved them money.
- They appreciated the communication.

"Because now I realise that there are better companies with better deals."

T2:External only/letter/reminder, Switched internally, Large supplier 1

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Appendix 4: Additional Details





Understanding of Ofgem

Although less than half remember Ofgem being mentioned in the email or letter, most have some awareness of what Ofgem does.

Out of 67 respondents...

27

Remembered Ofgem being mentioned in the letter/email

ofgem

34

had a **good,** basic understanding of the role of Ofgem

17

had **no understanding** (or an incorrect Understanding) of Ofgem's role

Around half had a basic understanding. These customers knew that Ofgem is a regulator, with most identifying correctly that it is the regulator for the energy market. A few also identified that Ofgem is responsible for dealing with complaints.

Most commonly, customers who *had* heard of Ofgem generally knew what it does. Some incorrectly associated Ofgem with a particular energy supplier or thought it is a regulator across multiple industries.

"The government's regulation body for energy suppliers... They deal with complaints too."
Large supplier 1, T2:External only/letter/reminder, Switched Internally

"No, [I don't know] a lot if I'm being honest."
Large supplier 2, T4:Internal/letter/reminder, Switched Internally

Role of the letter/email?

Five spontaneously mentioned that the role of Ofgem was explained in the letter. Indeed, those who remembered Ofgem being mentioned in the letter generally had a better understanding of Ofgem's role.



Customer perceptions of Ofgem

Customers that *did* have an understanding what Ofgem does were reassured that Ofgem was mentioned in the communication.

The inclusion of Ofgem in the letter made the letter feel more believable and trustworthy:

- Customers generally felt including Ofgem's name in the letter helped them to understand why the letter was sent to them.
- As Ofgem was seen as an impartial body, this made it clearer that the letter was not a sales exercise.
- However, the mention of Ofgem did not impact on all customers (especially those who didn't understand that Ofgem is impartial) as the 'savings speak for themselves'.



Despite Ofgem being seen as adding credibility, there was some feeling it was right that the letter didn't come from them directly.

Therefore, the energy supplier was generally seen as the right source for the letter, especially as the role of Ofgem wasn't understood by all.

Overall, the impact of the Ofgem endorsement is positive



Encouraging customers to switch

Letters and emails were seen as the best methods to provide information on the tariff options available, and there were mixed views about making contact by telephone.

Some customers would be wary of getting information by phone...

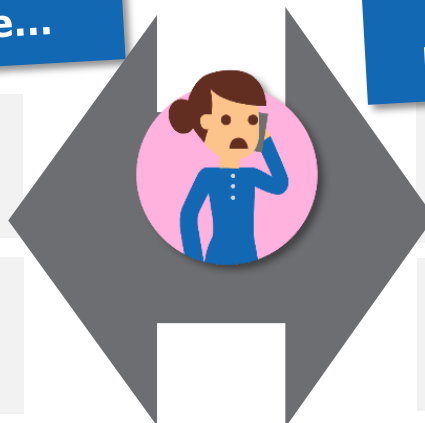
Not all would answer the phone to unknown numbers or would presume that the call is a scam.

The amount of information in the letter may be too much to be covered on a short call.

Others feel the phone might be a good approach to take...

Having a conversation could increase understanding of the options available.

A phone call may be beneficial as a reminder once a letter or email has been sent.



"Especially for older people it is too much information to take verbally so a letter is something you can actually reference. and do research on."

Large supplier 1, T1:External only/letter/no reminder, Switched Internally

"A phone call direct from the supplier..."
Medium supplier 2, T5:External only/email/no reminder, Haven't Switched - Don't plan to

Having a range of ways to communicate with customers was viewed as important.

What else?

Two think that offering an incentive may have been the best way to get customers to switch their supplier. Three suggest a text message would be a good way to communicate.

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