

Ofgem Consumer First Panel

Exploring trust and some Retail Market Review remedies

December 2015

Appendices



RESEARCH AND RECRUITMENT MATERIALS

This appendix to the Ofgem Panel report includes the following key documents:

- **Discussion guide**
- **Panel presentation**
- **Stimulus**
- **Recruitment questionnaire**
- **Achieved sample breakdown**

DISCUSSION GUIDE

Ofgem Consumer First Panel

Workshop 1 – Exploring potential barriers to and enablers of market engagement

The research should complement Ofgem’s RMR Year 1 evaluation findings.

Exploring trust in relation to the energy market

- What expectations do consumers have of suppliers? How, if at all, this differs from other energy suppliers?
- Do consumers trust their own suppliers? Do they trust other energy suppliers?
- How far do consumers trust their supplier / other suppliers? This will be partly explored through a series of statements on trust:
 - Trust in own energy supplier to treat a customer fairly in their dealings with a customer
 - Trust in own energy supplier to provide clear and helpful information
 - Trust in own energy supplier to charge a fair price
 - Trust energy suppliers to be open and transparent in their dealings with customers.
- What other factors influence trust?
- How, if at all, does trust effect market engagement?

Exploring RMR reforms in terms of awareness, understanding and usage

- To understand consumer’s current levels of engagement and reasons for this.
- To explore spontaneous consumer’s awareness and understanding of RMR reforms
- How far are RMR reforms understood and used (or not) and what effect, if any, they have on engagement with the energy market?
- Given RMR reforms are in place, what is it that deters consumers from engaging with the energy market?

| Timing | Exercises / activities | Comments |
|---------|--|----------|
| 10 mins | Introduction: <i>AIM: Welcome Panellists, explain Ofgem and Ipsos MORI, how Panel will operate, etc.</i> | |
| 15 mins | <u>Section 1: Spontaneous views and expectations of suppliers</u> <i>AIM: to get Panel thinking about their own supplier and the energy market in general and to begin to understand where consumer thinking lies in relation to trust and confidence.</i> | |
| 25 mins | <u>Section 2: Discussion of trust in suppliers and energy market</u> <i>AIM: to discuss different dimensions of trust then to see how people map them on to their own supplier / other suppliers in general.</i> | |
| 15 mins | <u>Section 3: Exploring statements on trust</u> <i>AIM: to explore a series of trust statements and establish if and how any resonate with Panellists.</i> | |
| 15 mins | <u>BREAK</u> | |
| 15 mins | <u>Section 4: Discussion of engagement with energy market</u> <i>AIM: Aim: to segment Panel based on their current levels of engagement and understand reasons why Panellists have them.</i> | |

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| <p>15 mins</p> <p>45 mins</p> <p>5 mins</p> | <p><u>Section 5: Spontaneous awareness and understanding of RMR changes</u> <i>AIM: to identify spontaneous consumer awareness and understanding of RMR reforms.</i></p> <p><u>Section 6: Discussion of RMR reforms</u> <i>AIM: to further explore awareness, understanding, usage of RMR reforms and identify any effect on engagement.</i></p> <p><u>Section 7: Close</u> <i>AIM: to bring the Panel to a close, invite participants to participate in the online community.</i></p> | |
| <p>00.00-00.10</p> <p>10 MINS</p> | <p><u>Arrival and Registration</u></p> <p>Pre-workshop poster activity A number of themed posters will be arranged on the walls in the workshop venue and Panellists will be asked to write their thoughts on these posters.</p> <p><i>Moderators/note-takers keep an eye on what is being written on the posters and ask Panellists to explain/elaborate on anything that is unclear.</i></p> <p>Themes for posters:</p> <ul style="list-style-type: none"> • What words or phrases would you use to describe your energy supplier? Tell us why. • What words or phrases would you use to describe other energy suppliers? Tell us why. • What have you heard about the energy market recently? • What changes in the energy market have you heard about over the last 12 months or so? <p><u>PLENARY Introduction</u></p> <p><i>Lead moderator to welcome. Using slides they explain who Ofgem is, its key aims, and briefly cover what it does through the use of two examples, protection of vulnerable consumers, regulating network companies. Don't want to go into RMR at this stage as we need spontaneous awareness of reforms.</i></p> <p><i>Then explain that Ofgem uses the Consumer First Panel to inform its policy-making and that the overarching question for this event is – <u>Are there things which encourage you or put you off from engaging in the energy market?</u></i></p> <p><i>Inform Panellists how the Panel operates and crucially let them know that everything they say will be reflected in the report and fed back to Ofgem. Introduce the team and observers. Housekeeping. And run through what will happen in Panel.</i></p> <p><i>Say that second part of the workshop will discuss recent changes to the energy markets which you may have noticed. First, we want to talk to you about your thoughts about energy suppliers.</i></p> | <p><i>AIM: to get Panellists top of mind views about own supplier and energy market in general and to find out if they have heard about changes to the market.</i></p> |

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| <p>00.10-00.25 15 mins</p> <p>5 mins</p> <p>10 mins</p> | <p><u>Section 1: Spontaneous views and expectations of suppliers</u></p> <p><u>IN TABLES</u></p> <p><u>Quick introductions around the table. First name, ever switched tariff/supplier and (if switched) how recently.</u></p> <p><i>Moderator note: the probes below are to be used during introductions. Use judgment how and when used; there isn't enough time to ask them of each participant.</i></p> <p>PROBES: whether think on best deal, experience of tariff comparison e.g. using price comparison.</p> <p>IF NEVER SWITCHED TARIFF /SUPPLIER: ever considered switching tariff/supplier – IF YES: why did you not go through with it? IF NO: Why not?</p> <p>Is there anything that you've heard about the energy market in general that puts you off engaging? Use wall of issues responses and the following to probe: price freezes, market referral to Competition and Markets Authority.</p> <p><i>Now I would like to discuss what you think your supplier does / doesn't do well and how you think this compares to other suppliers.</i></p> <p><i>FLIPCHART responses.</i></p> <p>What does your supplier do well? Why those things?</p> <p>What does your supplier do less well with / anything to be improved? Why those things?</p> <p>IF YES: Do you think your supplier will get better at doing those things? What are you basing that on? Probe: <u>views of supplier / other suppliers e.g. confidence / trust, things you have heard about / noticed in the energy market?</u></p> <p>And what difference, if any, do you think that will make to you as an energy consumer?</p> <p>Do you think there are some energy suppliers that are better than others?</p> <p>IF YES: what are you basing that on? Do you ever think about switching to any of the better ones? Why do / don't' you?</p> <p>Do you think your own supplier is better than other suppliers? Why do you say this? How do you know if you haven't switched?</p> | <p><i>AIM: to get Panel thinking about their own supplier and the energy market in general and to begin to understand where consumer thinking lies in relation to trust and confidence.</i></p> <p><i>Moderator note: allow a few mentions of price then park; say it is not within Ofgem's remit to control prices set by energy suppliers. In terms of supplier performance, Ofgem have said some Panellists may have experienced problems with their supplier recently.</i></p> |
| <p>00.25-0.50 25 mins</p> <p>15 mins</p> | <p><u>Section 2: Discussion of trust in own energy supplier and energy market in general</u></p> <p><u>TABLES</u></p> <p>Hand out ideas books.</p> <p>Working individually. In your ideas book I'd like you to write-down words / ideas you think your own supplier to be and ones you think other energy suppliers to be.</p> <p>You can use the same words / ideas when it comes to your own supplier and other energy suppliers. For each idea / word you</p> | <p><i>AIM: to discuss different dimensions of trust then to see how people map them on to their own supplier / energy market in general</i></p> |

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| <p>10 mins</p> | <p>write-down I also need you to tell me what your own supplier / other suppliers would be doing to have achieved that thing.</p> <p>Hand-out stimulus with words / ideas that relate to energy suppliers. Using this list I'd now like you to choose the ones which you think your own energy supplier to be and ones you think other suppliers to be. Also think about whether you agree with these descriptions – you may want to consider words or descriptions that are the opposite of these presented. Use the same pages in your ideas book to write down your answers...</p> <ul style="list-style-type: none"> • Transparent • Clear • Consistent • Reliable • Honest • Competent • Accountable • Customer focussed • Committed • Goodwill • Care <p><u>Panellists feedback to the table; words assigned to own / other suppliers and what they'd be doing to have achieved that thing.</u></p> <p>Ask what do you base your answers on? Probe: personal experience, commonly held belief, word of mouth, media etc.</p> <p>Still working individually I would like you to return to your ideas book and write down on a post-it (one each) the top four issues that you think are most important when it comes to energy suppliers.</p> <p>PLENARY</p> <p>We have a series of stations presented on the wall here with a series of descriptions</p> <ul style="list-style-type: none"> • “I only trust my supplier to behave like this” • “I trust some suppliers to behave like this” • “I trust all supplier to behave like this” • “I don't trust any supplier to behave like this” <p>–Participants place the post-it on the right flipchart poster.</p> <p>Lead moderator asks up to 7 people. Why have you put your post its where you have?</p> | |
| <p>00.50-01.05 15 mins</p> | <p><u>Section 3: Exploring trust statements</u></p> <p><i>We'd like to understand a bit more about trusting suppliers.</i></p> <p>Give each Panellist a handout containing a series of statements. Say the statements are to do with trust in your energy supplier and /or other energy suppliers.</p> <p>Working individually. In your ideas books I would like you to answer each question and then we can discuss the way you've answered them.</p> | <p><i>AIM: to explore a series of trust statements and establish if and how any resonate with Panellists.</i></p> |

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| | <p><i>Moderator note: Questions and response scales will appear as they do on the capi:</i></p> <p>How far do you trust your own energy supplier to do each of the following things:</p> <ol style="list-style-type: none"> 1. to treat you fairly in their dealings with you 2. to provide clear and helpful information 3. to charge a fair price <p>For each statement I would also like you to write down what suppliers would be doing to have met this description.</p> <p>And how far to do you trust all energy supplier to</p> <ol style="list-style-type: none"> 4. to be open and transparent in their dealings with customers <p>Allow 10 mins for people to write down and then ask</p> <p>For each statement</p> <ul style="list-style-type: none"> • How did you answer that question? Why? • And what did you write down in the box next to it. • IF NEEDED What did you understand the question to mean? What makes you say that e.g. particular words/phrases? <i>Moderator note: probe any differences in interpretation of statements 1 and 4 e.g. what does fairly mean to you? What does open and transparent mean to you?</i> • How important is this to you? Why /why not? • And how they could lose it? And would that matter? How? • IF NOT TRUSTED: What would your energy supplier have to do to gain your trust? Moderator note: listen out for influencers of trust. • If they did do that thing, what difference would it make to you? Why do you say that? • Would any of your responses change if you think about your own supplier / other suppliers / energy market in general? <p>Overall to what extent do you think trust of your own / other suppliers impacts how you engage in the energy market? Why do you say that? Do you think you trust your supplier/other suppliers more or less than a year ago and why?</p> | |
| <p>01.05-01.20 15 mins</p> | <p><u>BREAK 15 MINS</u></p> | |
| <p>01.20-01.35 15 mins</p> | <p><u>Section 4: Discussion of engagement with energy market</u></p> <p><u>PLENARY</u></p> <p>Welcome back. The final session is about your experience of the energy market and changes to the energy market that you may have seen.</p> <p>The final session will run a little differently and I want to begin by asking you all to stand up...</p> | <p><i>Aim: to segment Panel based on their current levels of engagement and understand reasons why Panellists have them.</i></p> |

Now, I want you to listen to the following descriptions which present four different types of consumer.

Imagine each corner of the room represents one of the four types of consumer which are shown on the screen. Moderator to explain which corner of the room denotes each type. Based on the following descriptions we would like you to stand in the corner which you identify with the most, you do not need to have done or considered all of the things. Allow enough time for people to change their mind.

TUNED IN *Moderator note: we will combine tuned in / switched on*

- I keep an eye on the market – comparing tariffs or changing supplier now and then
- I read the my bills and other info that my supplier sends me – but don't always do anything as a result
- I've thought about switching tariff supplier in the last 12 months.

SWITCHED ON

- I know what tariff I'm on and understand its features
- I like to be on the cheapest tariff and switch quite regularly
- I also read info my supplier sends me and take action as a result of it
- I feel confident comparing and switching in the market
- I've switched my supplier/tariff in the last 12 months
-

ON STANDBY

- I compare tariffs or look at changing supplier very rarely
- I understand a bit more about my tariff
- And might have a quick look at my bills or other info
- I don't feel confident switching tariffs
- I've switched tariff/supplier

UNPLUGGED

- I haven't changed or compared tariffs or suppliers in the last few years
- I don't look at my bills or other info my supplier sends me (maybe just what I owe)
- I haven't had much contact with my supplier in the last few years
- I'm not sure what I spend on energy every year
- I hardly ever think about switching tariff or supplier

Still in plenary: lead moderator to probe...

FOR THOSE DECIDING GROUP QUICKLY / CONFIDENT WITH DECISION

- Seemed to decide quickly – why / what influenced your decision?

FOR THOSE UNSURE / HESITANT ON DECISION / SWITCHING GROUPS

- That seemed to be difficult, why was that?
- What made you decide to switch groups? Probe: statement / behaviour / just a feeling?

Moderator note: lead moderator combines the 'Switched on' and 'Tuned In' groups due to the number of moderators.

In segmented groups

Switched on / tuned in group

So, can I check that everyone in this group has switched supplier / or tariff in the last twelve months?

Moderator note: if someone doesn't fit this description then ask them to join the relevant group provided there is space for them.

And what motivated you do that? e.g. better deal i.e. saving, improved customer service, easier to navigate the energy market, problem with supply etc.

And are you satisfied with your switch? Why / why not?
Probe fully thinking that lies under drivers of satisfaction.

On standby

So, can I check that everyone in this group compare tariffs or look at changing supplier very rarely?

Moderator note: if someone doesn't fit the description then ask them to join the relevant group provided there is space for them.

Can anyone tell me if they have considered switching supplier or tariff in the last twelve months?

What prompted you to consider? PROBE: supplier communications and / or pieces of information contained in those communications, anything else you have seen / heard?

Did anyone consider doing something about their energy but in the end didn't? What put you off?

Allow for spontaneous and then probe

- Satisfied with own supplier – probe drivers of satisfaction
- Perceptions of market e.g. too complex / too confusing e.g. unsure which tariff to choose / which one right for me (probe meaning of "right")
- Lacked information needed to switch e.g. energy usage, details of tariff etc.
- Concerns around switching process e.g. length, reliability, error
- Perceptions of consumer benefit e.g. low price differential
- Hassle – probe what is meant by "hassle"
- Trust / confidence in other suppliers? i.e. a belief they're better off sticking
- Not interested / bothered – extent to which this is reflected in their attitudes towards other markets?
- Is there anything about that you've heard about the energy market any general that puts you off engaging?

Moderator note: link back to wall of issues.... Are these

| | | |
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| | <p><i>stopping you engaging?</i></p> <p>If not considered doing something. Is there a reason for that?</p> <p><u>Unplugged</u></p> <p>Can I check that everyone in this group hasn't changed or compared tariffs or suppliers in the last few years?</p> <p><i>Moderator note: if someone doesn't fit the description then ask them to join the relevant group provided there is space for them</i></p> <p>Reasons why?</p> <p>Allow for spontaneous and then probe</p> <ul style="list-style-type: none"> • Satisfied with own supplier – probe drivers of satisfaction • Perceptions of market e.g. too complex / too confusing e.g. unsure which tariff to choose / which one right for me (probe meaning of “right”) • Lacked information needed to switch e.g. energy usage, details of tariff etc. • Concerns around switching process e.g. length, reliability, error • Perceptions of consumer benefit e.g. low price differential • Hassle – probe what is meant by “hassle” • Trust / confidence in other suppliers? • Not interested – extent to which this is reflected in their attitudes towards other markets? Is there anything about that you've heard about the energy market any general that puts you off engaging? <i>Moderator note: link back to wall of issues.... Are these stopping you engaging?</i> | |
| <p>01.35-01.45 10 mins</p> | <p><u>Section 5: Spontaneous awareness and understanding of RMR changes</u></p> <p><i>The aim of this section is to understand awareness of Ofgem's work to reform the retail energy market. We want to find out whether you have seen any changes, if and how you used them. Don't worry if you haven't seen any changes or you saw them but did nothing as we will run through them shortly.</i></p> <p>Can you tell me what you have heard about changes to the market recently? If needed prompt with supplier communications.</p> <p>For each one mentioned ask – what were your first thoughts, initial impression, opinion</p> <p><i>Listen out for any RMR reforms and probe fully...</i></p> <p><i>What did you think it was for?</i> <i>Where did you see it?</i> <i>Who did you think this information was for?</i> <i>How useful do you think this change is to you?</i> <i>Did anyone try to use any of these things?</i></p> <p>IF YES:</p> | <p><i>AIM: to identify spontaneous consumer awareness and understanding of RMR reforms.</i></p> |

communications

*Moderator explains that an area of Ofgem’s work has been to ensure consumers are aware of their tariff and available alternatives. **For this to happen suppliers must ensure they provide key pieces of information in a variety of supplier communications.***

Can anyone tell me how it has done this?

Allow for spontaneous

IF AWARE OF PIECE OF INFORMATION CONTAINED ON SUPPLIER COMMUNICATIONS

How did you find out about them? Any immediate thoughts, positive / negative. What are you basing that on?

Moderator note: Using stimulus explain what each one is in turn.

Taking each one in turn, allow 2 min to read about each piece of information contained on supplier communication.

1. Tariff Comparison rate (TCR)
2. Cheapest tariff messaging (CTM)
3. Personal projection (PP)
4. Tariff Information label (TIL)

Are there things which you were already aware of? IF YES:
Where did you see it?

IF NOT AWARE OR STRUGGLING TO ENGAGE THEN WE INTRODUCE..

Mock-ups to show what each piece of information looks like / how it might appear on a supplier communication.

**Has anyone tried to use this piece of information?
Can you explain fully what you understood it was for?
Can you explain fully how you used it?** Probe: ease of use / outcome.

**IF DID NOT USE:
Is there a reason why?**

What are the positives of these for you? Is engaging in the market easier?

**Are there any negatives? What are they? For whom?
How likely is it you will use any of these in the future? Why / why not?**

Have any made you consider doing something about your energy but in the end you didn’t? Why / what happened?

Switched on / tuned in group

As you’ve identified yourself as someone who switches fairly regularly are all these changes important to you? Which ones are most useful? Why?

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| | <p>Have any made a difference to you? How? Please explain fully. Probe: ease of making comparisons etc.</p> <p><u>On standby and unplugged groups</u></p> <p>If there are people in either of these groups that mention barriers to engagement that could be solved by clearer information, say....</p> <p>What difference do you think these changes have made for you? How likely is it you will use any of these in the future? Why / why not?</p> <p>Now you know that there are things to help you when you're thinking about your options, are there things that worry you about switching supplier/tariff? What are they?</p> <p>Allow for spontaneous then probe:</p> <ul style="list-style-type: none"> • Satisfied with own supplier – moderator probe drivers of satisfaction • Concern around switching process e.g. length, reliability, error • Hassle – moderator probe what is meant by “hassle” • Trust in own supplier / a lack of it in others – moderator probe influencers of trust • Confidence in own supplier / a lack of it in others – moderator to probe influencers of confidence • Not interested / bothered – extent to which is reflected in their attitudes towards other markets? • Still too confusing / complex – probe exactly what this is <p><u>ALL</u></p> <p>Overall, what difference, if any, have changes to supplier communications made to you? And in terms of the pieces of information contained on them?</p> | |
| <p>02.30-02.35 5 MINS</p> | <p><u>Wind-down</u></p> <p><u>PLENARY</u></p> <p>Thanks for their contributions and sharing their views with Ofgem. Explain that findings from this round of workshops will help Ofgem better understand the impact its RMR reforms are having on the energy market. It will also inform what further work may be needed to protect the interests of consumers.</p> <p>Explain we are also running an online discussion. This allows Panellists to reflect on the issues we've discussed this evening and make further contributions if you wish! We really encourage you to!</p> <p>Lead moderator uses slide to demonstrate how it may look and talks through one or two activities and explains how to log in after receiving email invite. Tablets are available for participants to explore the demo site.</p> <p>Distribute incentives and feedback questionnaires questionnaire.</p> | |

PANEL PRESENTATIONS

- INTRODUCTORY PRESENTATION

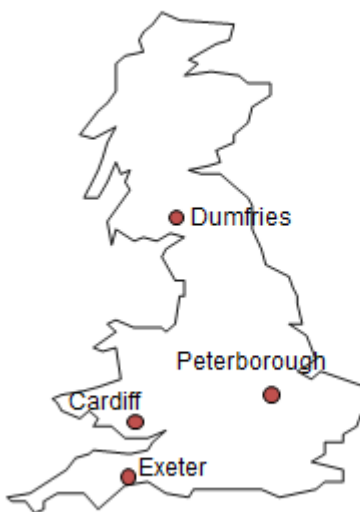


Welcome!

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About the Consumer First Panel



- Here to listen to your views about things that are important in the energy market
- 85 people (Panellists) from different backgrounds across Great Britain
- This is the seventh year of the Consumer First Panel and it has really helped Ofgem’s policy decisions

Who’s here?

- Facilitators and note takers from Ipsos MORI, Ofgem, You!

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What is Ofgem?

Ofgem is Great Britain's energy regulator and its priority is to make a positive difference for consumers

It does this by regulating the companies that operate the pipes and wires that transport gas and electricity into homes / businesses...



And by overseeing the energy market, setting obligations about how energy suppliers act and promoting competition

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Why is the Panel important?



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

- Your views will feed into Ofgem's policies...
- And help make the energy market better for all consumers



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Housekeeping



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What are we doing this evening

- **Discuss** your thoughts on the energy market, and things you may have heard about it lately
- **Learn about** what Ofgem does, and how the energy market works
- **Share** our views...
- **And give our feedback to Ofgem**
- **Think about the issues after the event** to get ready for next time

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Why we are here: first Panel session

Focus of this evening's discussion is...



- *Are there things which encourage or deter you from engaging in the market?*



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Over to you!

Introductions

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- RMR PRESENTATION



Retail Market Review

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What is the Retail Market Review?

RMR designed to make the market less complex and confusing so it's easier for consumers to compare tariffs



SIMPLER



CLEARER



FAIRER

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Tariff Comparison Rate (TCR)



- The **Tariff Comparison Rate (TCR)** is a rate provided to consumers to allow a comparison of one tariff against another
- Calculated in costs per kWh that a typical customer would pay on that tariff

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Cheapest Tariff Messaging



An estimate of how much a consumer would save per year, if they changed from their current tariff to:

- A tariff which fits with a customer's current preferences (eg fixed/variable tariff, meter type, online/offline mgt) and;
- Another tariff which is the overall cheapest of all tariffs supplied by that supplier

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Personal projections



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- The Personal Projection gives you a personalised cost estimate based on your previous energy consumption
- It takes into account any discounts and charges associated with your tariff, as well as the way you want to pay



Tariff Information Label (TIL)



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- A simple breakdown of the key details relating to energy tariffs for gas and electricity
- TILs are printed on consumers' annual summaries and EoFTN and are available to view on energy providers' websites



Example Tariff Information Label (TIL)

Your tariff information

About your electricity tariff

| | |
|---|---------------------------|
| Supplier | StarPower |
| Tariff name | StarPower Fixed Renewable |
| Tariff type | Gross, Fixed price |
| Payment method | Direct Debit |
| Unit rate | 34.01p per kWh |
| Standing charge | 37.81p per day |
| Tariff ends on | 30 February 2013 |
| Price guaranteed until | 30 February 2013 |
| Exit fees (if you cancel this tariff before the end date) | £50.00 |
| Discounts and additional charges | No discounts |
| Additional products or services included | Loyalty points |

Illustrative electricity cost on this tariff

| | |
|------------------------------|----------------|
| Assumed annual consumption | 3,300 kWh |
| Estimated annual cost | £125.98 |
| Tariff Comparison Rate (TCR) | 35.94p per kWh |



STIMULUS

- WORD ASSOCIATION

Transparent

Reliable

Clear

Care

Goodwill

Honest

Confident

Competent

Consistent

Accountable

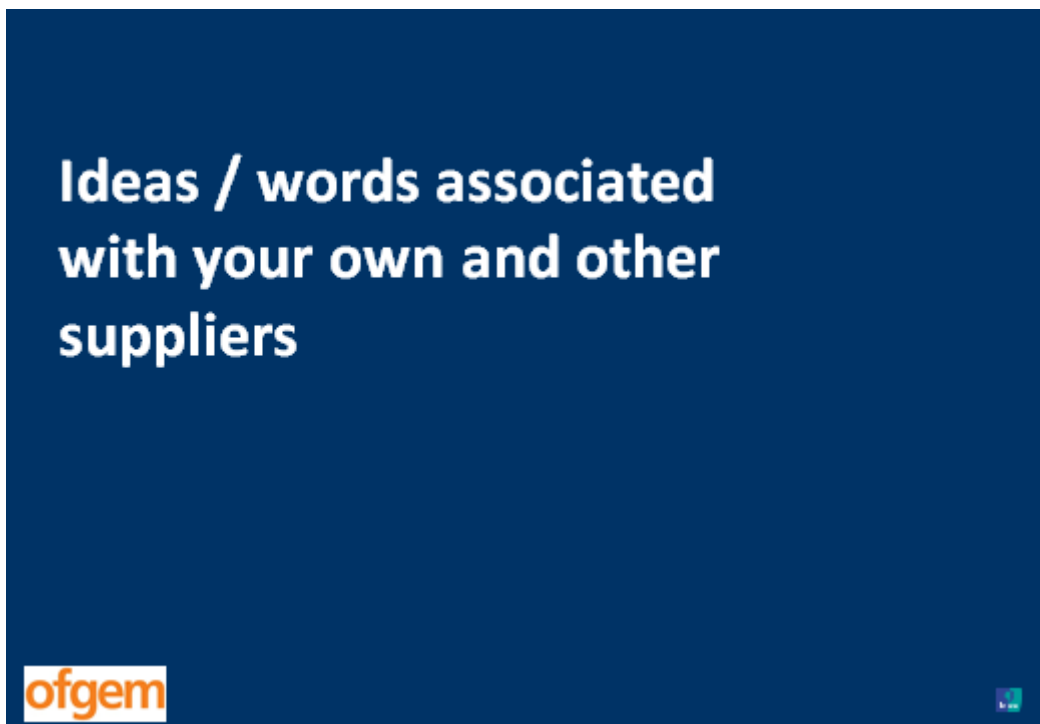
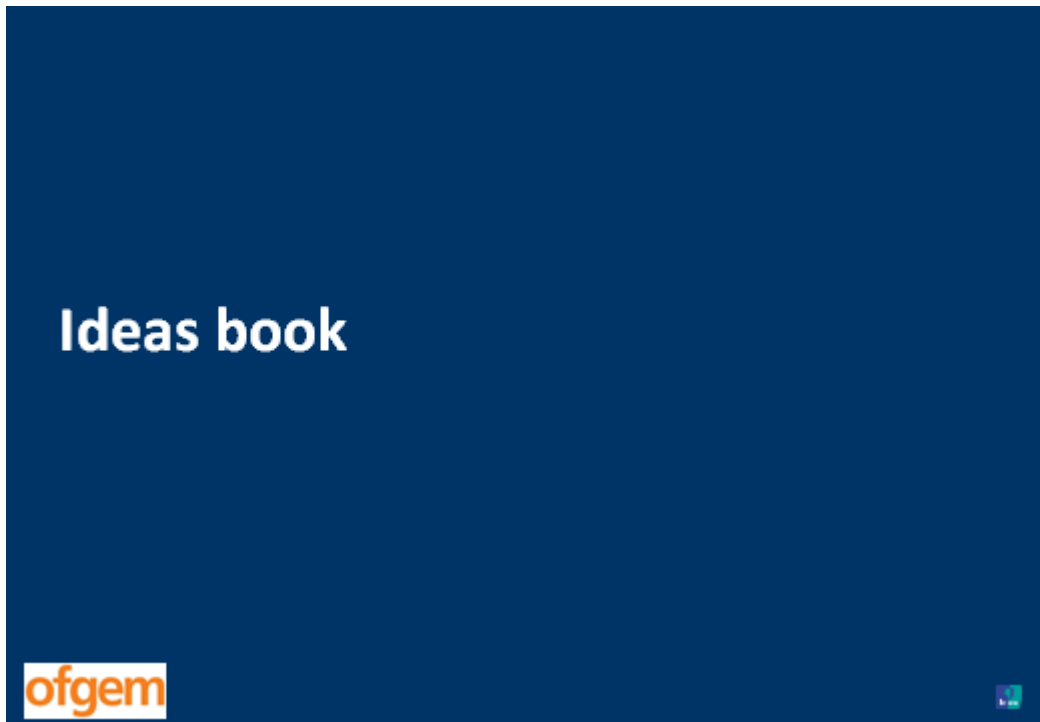
Committed

Customer
focused

ofgem



- IDEAS BOOK



Words / ideas associated with your own supplier

3

Working individually I would like you to write down words / ideas you think your own energy supplier to be

Write in here words / ideas you think your own supplier to be

Write in here what your supplier would be doing to have achieved that

 Social Research Institute
© 1998 MORI



Words / ideas associated with your own supplier

3

Working individually I would like you to write down words / ideas you think your own energy supplier to be

Write in here words / ideas you think your own supplier to be

Write in here what your supplier would be doing to have achieved that

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Words / ideas associated with other suppliers

6

Working individually I would like you to write down words / ideas you think other suppliers to be

Write in here words / ideas you think other suppliers to be

Write in here what other suppliers would be doing to have achieved that

Trust statements



To treat you fairly in their dealings with you...

7

Please work individually.

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

Treat you fairly in their dealings with you

Tick **one** box

- Trust completely
- Tend to trust
- Neither trust nor distrust
- Tend to distrust
- Strongly distrust

Write in here what your supplier would be doing to have met this description...

ISSUES TICKETS
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To provide clear and helpful information

8

Please work individually.

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

Provide clear and helpful information for you

| | |
|---|--|
| <p>Tick one box</p> <p>Trust completely <input type="checkbox"/></p> <p>Tend to trust <input type="checkbox"/></p> <p>Neither trust nor distrust <input type="checkbox"/></p> <p>Tend to distrust <input type="checkbox"/></p> <p>Strongly distrust <input type="checkbox"/></p> | <p>Write in here what your supplier would be doing to have met this description...</p> |
|---|--|

ISSUES TICKETS
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© Ipsos MORI

ISSUES TICKETS

To charge a fair price

8

Please work individually.

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

Charge you a fair price for your electricity/gas

| | |
|---|--|
| <p>Tick one box</p> <p>Trust completely <input type="checkbox"/></p> <p>Tend to trust <input type="checkbox"/></p> <p>Neither trust nor distrust <input type="checkbox"/></p> <p>Tend to distrust <input type="checkbox"/></p> <p>Strongly distrust <input type="checkbox"/></p> | <p>Write in here what your supplier would be doing to have met this description...</p> |
|---|--|

ISSUES TICKETS
Social Research Institute
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ISSUES TICKETS

To be open and transparent in their dealings with customers

10

Please work individually.

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

Tick **one** box

| | |
|----------------------------|--------------------------|
| Trust completely | <input type="checkbox"/> |
| Tend to trust | <input type="checkbox"/> |
| Neither trust nor distrust | <input type="checkbox"/> |
| Tend to distrust | <input type="checkbox"/> |
| Distrust completely | <input type="checkbox"/> |
| Don't know | <input type="checkbox"/> |

Write in here what suppliers would be doing to have met this description...

ISSUES 10/01/11
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ISSUES

OFGEM CONSUMER FIRST PANEL RESEARCH

Recruitment Questionnaire

30.06.15

Good morning/afternoon/evening, my name is from Ipsos MORI, the research organisation.

We are asking around 80 people from different backgrounds across England, Scotland and Wales to take part in a series of events to think about and discuss issues affecting energy consumers both now and in the future.

The research is being conducted on behalf of Ofgem, the Office of Gas and Electricity Markets, which is the independent regulator in Great Britain for the energy sector. Its aim is to protect the interests of energy consumers.

The research will help Ofgem to better understand the views of energy consumers on a range of key issues which affect consumers like you. By taking part you will gain a better understanding of how the energy market works. Would you be willing to take part?

NB: Please check recruitment instruction for information on Cardiff workshop composition.

Taking part involves attending three workshops across the next 9 months. The evening workshops will run from 6.15pm – 9.15pm, and be held in a central location. For registration you should arrive at the venue between 5.45 and 6pm.

To say thank you for your time and cover any expenses incurred we would like to offer £45 for attending the first event, £50 for the second, and £55 for the third. (RECRUITER NOTE: THE INCENTIVE OFFERED REPRESENTS COMPENSATION FOR THEIR TIME, TRAVEL EXPENSES AND ANY CHILDCARE). When you sign up to the research you are making a commitment that you will endeavour to attend all three workshops over the course of the year.

There may be some short activities before and in between the workshops to get involved in.

This activity may involve completing complete a short task either online or by completing a paper based version at home. NB if people have an email address it is really important that you write it down so that we can alert them to the online task.

We are looking for particular groups of people; therefore I would like to ask you some questions about yourself. All information collected will be anonymised.

ASK ALL

Q1

Would you be interested in taking part in this Panel (attending at least 3 discussions over the next 9 months)?

| | | |
|-----|---|----------|
| Yes | 1 | CONTINUE |
| No | 2 | CLOSE |

ASK ALL

Q2

Can I ask if you are available on the date and time of the first event? (INSERT DATE AS APPROPRIATE)?

| | | |
|-----|---|----------|
| Yes | 1 | CONTINUE |
| No | 2 | CLOSE |

ASK ALL

Q3

Do you have regular access to the internet?

| | | |
|---|---|-------------------------|
| Yes – I have regular access to the internet | 1 | RECORD BUT NOT TO QUOTA |
| No - I do not have regular access to the internet | 2 | |
| Don't know | 3 | |

ASK ALL

Q4 SHOWCARD A **Do you or any members of your immediate family or close friends work in any of the following areas, either in a paid or unpaid capacity? Have you ever worked in any of these areas?**

READ OUT AND SINGLE CODE ONLY

| | | |
|--|----|-----------------|
| Journalism/the media | 1 | THANK AND CLOSE |
| Market Research | 2 | |
| Elected politician (e.g. local councillor) | 3 | |
| Department of Energy and Climate Change (DECC) | 4 | |
| Ofgem | 5 | |
| A gas or electricity supplier | 6 | |
| A gas or electricity network company | 7 | |
| Consumer organisations (e.g. Which? Citizens Advice) | 8 | |
| No, none of these | 9 | CONTINUE |
| Don't know | 10 | |

ASK ALL

Q5 **Have you participated in a group discussion for an opinion or market research company in the last 12 months, or are you on any kind of consumer panel?**

| | | |
|-----|---|-----------------|
| Yes | 1 | THANK AND CLOSE |
| No | 2 | CONTINUE |

ASK ALL

Q6 **Are you mainly or jointly responsible for making decisions about the energy bills for your household? For example, choosing the supplier or the way you pay for energy.**

| | | |
|-----|---|-----------------|
| Yes | 1 | CONTINUE |
| No | 2 | THANK AND CLOSE |

Ipsos MORI/15-035666-01
 Q7 **Code sex (do not ask)**

| | | |
|--------|---|------------------|
| Male | 1 | RECRUIT TO QUOTA |
| Female | 2 | |

ASK ALL

Q8 **Write In & Code Exact Age**

| | | |
|------------------------------------|---|------------------|
| Exact Age <input type="checkbox"/> | | |
| 18-24 | 1 | RECRUIT TO QUOTA |
| 25-34 | 2 | |
| 35-54 | 3 | |
| 55 - 64 | 4 | |
| 65 + | 5 | |

ASK ALL

Q9 **To which one of the groups I read out do you consider you belong?**

INTERVIEWER: PLEASE BE SURE TO WRITE IN ANY 'OTHER' INFORMATION FULLY AND CLEARLY.

SHOWCARD B SINGLE CODE ONLY SINGLE CODE ONLY

| | | |
|----------------------------|----|------------------|
| White British | 1 | |
| White Irish | 2 | RECRUIT TO QUOTA |
| Any other White background | 3 | |
| White and Black Caribbean | 4 | |
| White and Black African | 5 | |
| White and Asian | 6 | |
| Any other mixed background | 7 | |
| Indian | 8 | |
| Pakistani | 9 | |
| Bangladeshi | 10 | |
| Any other Asian background | 11 | |
| Caribbean | 12 | |
| African | 13 | |
| Any other black background | 14 | |
| Chinese | 15 | |
| Any other background | 16 | |

ASK ALL

Q10 **Which of these best describes your current living situation? (NB: TENURE)**

READ OUT. SINGLE CODE ONLY

SHOWCARD C SINGLE CODE ONLY SINGLE CODE ONLY

| | | |
|---|---|------------------|
| I live in and own my own home (with or without a mortgage) (Owner occupied) | 1 | |
| I rent from council/ housing authority/ I rent from private landlord/ estate | 2 | RECRUIT TO QUOTA |
| Other (e.g. living with parents) | 3 | |
| | 4 | |

ASK ALL

Q11 **Do you live in an urban/suburban (e.g. in a city, town or surrounding suburban area), or rural area (e.g. in a village, hamlet or in the countryside)?**

| | | |
|----------------|---|------------------|
| Urban/suburban | 1 | |
| Rural | 2 | RECRUIT TO QUOTA |

Q12 **Which of the following best describes your household?**

SHOWCARD D SINGLE CODE ONLY

| | | |
|--|---|-------------------------|
| Married /cohabiting with dependent children | 1 | |
| Married/cohabiting with no dependent children or no children | 2 | RECORD BUT NOT TO QUOTA |
| Multi-generational household | 3 | |
| Lone parent with dependent children | 4 | |
| Living alone | 5 | |
| Unrelated adults | 6 | |
| Not stated | 7 | |

ASK ALL

ASK ALL

Q13 **Which of these best describes your current situation?**

READ OUT. SINGLE CODE ONLY

| | | |
|--------------------|---|------------------|
| Full time employed | 1 | RECRUIT TO QUOTA |
| Part time employed | 2 | |
| Unemployed | 3 | |
| Retired | 4 | |
| Student | 5 | |
| Other | 6 | |

ASK ALL

Q14 **Occupation of Chief Income Earner in your household**

Position/rank/grade

Industry/type of company

Quals/degree/apprenticeship

Number of staff responsible for

CODE SOCIAL GRADE FROM ABOVE DO NOT ASK

| | | |
|----|---|------------------|
| AB | 1 | RECRUIT TO QUOTA |
| C1 | 2 | |
| C2 | 3 | |
| D | 4 | |
| E | 5 | |

ASK ALL

Q15 **What is your average cost of your yearly energy bill?** (NB IF UNKNOWN PLEASE TAKE DETAILS FOR WEEKLY/ MONTHLY /QUARTERLY BILLS AND MULTIPLY TO CALCULATE APPROXIMATE ANNUAL AMOUNT, SEE OVERLEAF FOR GUIDANCE AND USE THIS WHEN CALCULATING FUEL POVERTY IN Q.16

WEEKLY AMOUNT £ _____ X 52 = ANNUAL AMOUNT
£ _____

MONTHLY AMOUNT £ _____ X 12 = ANNUAL AMOUNT
£ _____

QUARTERLY AMOUNT £ _____ X 4 = ANNUAL AMOUNT
£ _____

ASK ALL

Q16 Which of the following bands does your household income fall into?

SHOWCARD E SINGLE CODE ONLY

| | | |
|-----------------------------|---|---------------------|
| Less than £10,000 per annum | 1 | |
| £10,000 - £14,999 per annum | 2 | |
| £15,000 - £19,999 per annum | 3 | |
| £20,000 - £34,999 per annum | 4 | RECORD AND CONTINUE |
| £35,000 - £60,000 | 5 | |
| More than £60,000 | 6 | |
| Refused | 7 | GO TO Q17 |

10% grid

| | |
|----------------|----------|
| 10% of £10,000 | £1000 |
| 10% of £14,999 | £1499.99 |
| 10% £19,999 | £1999.99 |
| 10% of £34,999 | £3499.99 |
| 10% of £60,000 | £6000 |

CODE FUEL POVERTY FROM ABOVE (DO NOT ASK)

(NB IF 10% OR MORE OF ANNUAL HOUSEHOLD INCOME IS SPENT ON ENERGY COSTS THEN MARK AS FUEL POVERTY)

Fuel poverty

| | | |
|-----|---|------------------|
| Yes | 1 | RECRUIT TO QUOTA |
| No | 2 | |

ASK IF CODE 7 AT Q.16

Q17 Thinking about your annual household income, would you say you spend more or less than 10 per cent of your household income on energy costs?

| | | |
|---------------|---|------------------|
| More than 10% | 1 | RECRUIT TO QUOTA |
| Less than 10% | 2 | |

Q18 Do you consider yourself to be living with a physical or learning disability? This could be a long term health condition that could be a physical or sensory loss; or a disability that affects the way you understand information and communicate.

Yes (PLEASE WRITE IN) 1

RECRUIT TO QUOTA

| | |
|----|---|
| No | 2 |
|----|---|

ASK ALL

Q19 How easy do you find it to read/understand your bills/statements?

| | | |
|-----------------|---|-------------------------|
| Very easy | 1 | RECORD BUT NOT TO QUOTA |
| Fairly easy | 2 | |
| Not very easy | 3 | |
| Not at all easy | 4 | |

ASK ALL

Q20 A lot of people struggle with reading/writing and understanding figures. Does this apply to you?

| | | |
|------------------------------------|---|-------------------------|
| No | 1 | RECORD BUT NOT TO QUOTA |
| Yes, struggle with reading/writing | 2 | |
| Yes, struggle with figures | 3 | |

ASK ONLY FOR CARDIFF WORKSHOP

Q21 Do you speak Welsh in your everyday life?

| | | |
|-----|---|--------|
| Yes | 1 | RECORD |
| No | 2 | |

ASK IF CODE 1 AT Q21

Q22 Would you be happy to participate in a discussion group in English?

| | | |
|-----|---|--------|
| Yes | 1 | RECORD |
|-----|---|--------|

| | |
|----|---|
| No | 2 |
|----|---|

ASK ALL

Q23 **Do you use electricity and gas, or electricity only?**

| | |
|---------------------|---|
| Electricity and gas | 1 |
|---------------------|---|

| | |
|------------------|---|
| Electricity only | 2 |
|------------------|---|

RECRUIT TO QUOTA

ASK IF CODE 2 AT Q23

Q24 **What is the main way you heat your home? Please think about the heating system that you use to heat the majority of your home.**

READ OUT, SINGLE CODE

| | |
|---------------------|---|
| Oil Central heating | 1 |
|---------------------|---|

| | |
|------------------|---|
| Electric heaters | 2 |
|------------------|---|

| | |
|---------------------------------------|---|
| Solid fuel (open fire/enclosed stove) | 3 |
|---------------------------------------|---|

| | |
|----------------------|---|
| Bottled gas/paraffin | 4 |
|----------------------|---|

RECORD BUT NOT TO
QUOTA

| | |
|-------------------|---|
| Storage radiators | 5 |
|-------------------|---|

| | |
|-----------|---|
| Gas fires | 6 |
|-----------|---|

| | |
|------------------------------|---|
| Communal or district heating | 7 |
|------------------------------|---|

| | |
|------------|---|
| Don't know | 8 |
|------------|---|

| | |
|-----------------------|---|
| Other: please specify | 9 |
|-----------------------|---|

Q25 **How do you currently pay your gas and electricity bill?**

SHOWCARD F

Gas

Electricity

| | | |
|--------------|--|--|
| Direct debit | | |
|--------------|--|--|

| | | |
|--|--|--|
| Pre-payment meter (PPM, card or key meter) | | |
|--|--|--|

| | | |
|--|--|--|
| Quarterly payment on receipt of bill (payment on demand) | | |
|--|--|--|

| | | |
|-------|--|--|
| Other | | |
|-------|--|--|

RECRUIT TO QUOTA

| RECRUIT TO QUOTA | | | | |
|---|--|---|---|--|
| <p>I'm going to read out a series of statements, please answer using the showcard provided. Have you ever...</p> <p>a) Switched supplier b) Changed your tariff with your current energy supplier c) <u>Thought</u> about switching d) <u>Thought</u> about changing your tariff with your current supplier</p> | <p>1</p> <p>Switched supplier</p> | <p>2</p> <p>Changed tariff with current supplier</p> | <p>3</p> <p>Thought about switching supplier</p> | <p>4</p> <p>Thought about changing tariff with current supplier</p> |
| <p>Yes, in the last year</p> | | | | |
| <p>Yes, but not in the last year</p> | | | | |
| <p>Never</p> | | | | |

Ipsos MORI/15-035666-01
 ASK ALL

Q28 Who is your current energy supplier?

READ OUT AND TICK

| | 1 Both | 2 Gas | 3 Electricity |
|--|-----------|----------|------------------|
| British Gas | | | |
| Scottish Power | | | |
| EDF (could be SWEB in Exeter) | | | |
| Eon / Powergen | | | |
| Npower | | | |
| Scottish and Southern Energy (includes Southern Electric, Hydro and SWALEC) | | | |
| Other (PLEASE SPECIFY) | | | |

RECRUIT TO QUOTA

ASK ALL

Q29 What type of meter do you use?

| | | |
|------------------|---|-------------------------|
| Single rate | 1 | |
| Economy 7 | 2 | |
| Economy 10 | 3 | |
| DTS, White meter | 4 | RECORD BUT NOT TO QUOTA |
| Don't know | 5 | |

Q30 Thank you for agreeing to join the Consumer First Panel. We will re-contact you over the course of the next 12 months by telephone and email. During this time you will be contacted for the purpose of taking part in additional tasks and to invite you to the two subsequent workshops.

Please be assured that your contact details will be stored in accordance with our Information Security guidelines and will not be passed onto anyone outside of the company.

Please confirm you are happy with this

| | | | |
|--|-----|---|-----------------|
| | Yes | 1 | CONTINUE |
| | No | 2 | THANK AND CLOSE |

ACHIEVED SAMPLE BREAKDOWN

| Gender | Quota | Achieved |
|--------------------------|--------------|-----------------|
| Male | 42 | 40 |
| Female | 42 | 36 |
| Total | 84 | 76 |
| Age | | |
| 18-24 | 16 | 13 |
| 25-34 | 13 | 14 |
| 35-54 | 27 | 22 |
| 55-64 | 12 | 10 |
| 65+ | 16 | 17 |
| Total | 84 | 76 |
| Ethnicity | | |
| White British | 62 | 70 |
| White Other | 6 | 1 |
| Black or Minority Ethnic | 16 | 5 |
| Total | 84 | 76 |
| SEG | | |
| AB | 23 | 20 |
| C1 | 22 | 24 |
| C2 | 18 | 10 |
| DE | 21 | 22 |
| Total | 84 | 76 |
| Rural vs. Urban | | |
| Urban | 60 | 51 |
| Rural | 24 | 25 |
| Total | 84 | 76 |
| Electricity Only | | |
| Electricity Only | 19 | 18 |
| Electricity and gas | 65 | 58 |
| Total | 84 | 76 |
| Tenure | | |
| Owner Occupied | 46 | 40 |
| Social Rented | 18 | 17 |
| Private Rented | 18 | 19 |
| Other | 1 | 0 |
| Total | 84 | 76 |

| | | |
|--|-----------|-----------|
| Fuel Poverty | | |
| Yes | 21 | 19 |
| No | 63 | 57 |
| Total | 84 | 76 |
| Employment status | | |
| Employed | 44 | 40 |
| Unemployed | 13 | 10 |
| Student | 8 | 5 |
| Retired | 15 | 17 |
| Other | 4 | 4 |
| Total | 84 | 76 |
| Payment type | | |
| Prepayment | 18 | 18 |
| Quarterly payment on receipt of bill (standard credit) | 14 | 12 |
| Direct debit | 50 | 45 |
| Other | 2 | 1 |
| Total | 84 | 76 |