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# Micro and small business customer engagement in the energy market, 2016

Report Appendices

Prepared for Ofgem

April 2017

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## Contents

<b>1</b>	<b>Technical information .....</b>	<b>3</b>
1.1	Population .....	3
1.2	Sampling .....	3
1.3	Data collection.....	3
1.4	Data weighting .....	4
1.5	Data analysis.....	6
1.6	Defining the engagement outcome groups .....	8
<b>2</b>	<b>Questionnaire .....</b>	<b>10</b>
<b>3</b>	<b>Additional charts and tables .....</b>	<b>34</b>

## 1 Technical information

### 1.1 Population

The population for the *Micro and small business customer engagement in the energy market* survey is: **Micro and small business customers (defined as registered businesses with up to 49 employees) in Great Britain with a mains electricity and/or gas business energy contract for their business premises. The energy contract is managed by the business and not by a third party acting on their behalf.**

Only businesses meeting this definition were included in the survey. Businesses themselves provided their number of employees, confirmed their sector, and stated that they were responsible for their business energy contract.

### 1.2 Sampling

The commercial provider *Sample Answers* provided the sampling frame for the study and the study used a quota sampling design. A random sample of businesses was drawn from the sampling frame (using a 1 in  $n$  approach) to support the setting of **two quotas: size and sector**. Definitions for these quotas are provided in Table 1.

**Table 1: Quota definitions**

Quota	Label	Definition
1. Size	No employees	No employees
	Small micro	1-4 employees
	Large micro	5-9 employees
	Small	10-49 employees
2. Macro SIC <sup>1</sup> sectors	Primary (manufacturing, agriculture, mining)	SIC codes A, B, C, D, E
	Construction	SIC code F
	Retail/wholesale	SIC code G
	Transport, food, accommodation	SIC codes H, I
	Business services	SIC codes J, K, L, M
	Other services	SIC codes P, Q, R, S

The sample was drawn disproportionately to size to allow for different conversion rates among different business types and to provide a sufficient number of interviews for each quota in the data analysis stage.

### 1.3 Data collection

All interviews were conducted by telephone using **Computer Assisted Telephone Interviewing (CATI)**, and were carried out by Quadrangle at its London interviewing centre.

<sup>1</sup> Standard Industrial Classification

Interviewing took place between 9<sup>th</sup> November and 21<sup>st</sup> December, 2016 and the **average interview length was 17 minutes**.

A structured questionnaire was used (see Chapter 2) and all businesses were screened at the start of the interview to make sure:

- they met the population criteria (size and sector);
- they met quota requirements (size and sector, not inter-locking);
- the participant was solely or jointly responsible for arranging the mains gas and/or electricity contracts, or paying these bills; and
- the business the respondent worked for had a non-domestic energy contract for the business premises.

A total of **1,254 interviews** were conducted over the fieldwork period and Table 2 presents the number achieved against each quota.

**Table 2: Interviews achieved by quota**

Quota	Label	Interviews achieved
1. Size	No employees	252
	Small micro	401
	Large micro	300
	Small	301
2. Macro SIC sectors	Primary	227
	Construction	151
	Retail/wholesale	336
	Transport, food, accommodation	174
	Business services	228
	Other services	138
<b>Total</b>		<b>1,254</b>

## 1.4 Data weighting

Data were weighted to the population profile (as defined in Section 1.1). Rim weighting was applied, which involved adjusting the 2016 data to reflect the actual proportion of micro and small businesses with a non-domestic energy contracts in the population by size (Rim 1) and by sector (Rim 2).

The target weights, presented in Table 3, were established for the 2014 survey and have been held constant since then. This was important to ensure comparability of the 2016 data to previous survey years.

**Table 3: Population target weights vs. unweighted and weighted data**

Quota	Label	Target weight (%)	Target weight (count)	Un-weighted data (%)	Unweighted data (count)	Weighted data (%)	Weighted data (count)
1.Size	No employees	29%	364	20%	252	29%	364
	Small micro	39%	489	32%	401	39%	489
	Large micro	17%	213	24%	300	17%	213
	Small	15%	188	24%	301	15%	188
2.Macro SIC sectors	Primary	18%	226	18%	227	18%	226
	Construction	6%	75	12%	151	6%	75
	Retail / wholesale	28%	351	27%	336	28%	351
	Transport, food, accommodation	14%	176	14%	174	14%	176
	Business services	22%	276	18%	228	22%	276
	Other services	12%	150	11%	138	12%	150
<b>Total</b>		<b>100%</b>	<b>1,254</b>	<b>100%</b>	<b>1,254</b>	<b>100%</b>	<b>100%</b>

## 1.5 Data analysis

Data collected in 2016 were prepared to support analysis by the variables presented in Table 4 (see the questionnaire in Chapter 2 for further detail on question wording). These variables are presented as crossbreaks in the 2016 survey data tables, which are provided as a publicly-available resource by Ofgem.

**Table 4: Crossbreaks in 2016 survey data tables**

Crossbreak variable	Label	Definition: Question reference
a) Business size	No employees	QS4_1=1
	Small micro (1-4)	QS4_1= 2-3
	Large micro (5-9)	QS4_1=4
	Small (10-49)	QS4_2= 5-8
b) Sector	Primary	dQA2_1=1-5
	Construction	dQA2_1=6
	Retail/wholesale	dQA2_1=7
	Transport, food, accommodation	dQA2_1=8-9
	Business services	dQA2_1= 10-14
	Other services	dQA2_1= 16-19
c) Fuel	Electricity	dQS8=1
	Gas	dQS8=2
d) Fuel responsibility	Electricity only	QS8=2
	Electricity & Gas	QS8=1
	Gas only	QS8=3
e) Site	Single-site	QS5=1 (numeric) OR QS6=1 (code)
	Multi-site	QS6=2 OR 3
f) Smart meter	Have	QG1=1
	Don't have	QG1=2
g) Electricity spend (per year)	Less than £500	QB2=1
	£501 to £1,000	QB2=2
	£1,001 to £2,500	QB2=3
	£2,501 to £5,000	QB2=4
	£5,001 to £6,500	QB2=5
	Net: Less than £6,500	QB2=1-5
	Net: £6500 or more	QB2=6-10

Crossbreak variable	Label	Definition: reference	Question
h) Gas spend (per year)	Less than £500	QB6=1	
	£501 to £1,000	QB6=2	
	£1,001 to £2,500	QB6=3	
	£2,501 to £2,900	QB6=4	
	NET: Less than £2,900	QB6=1-4	
	NET: £2,900 or more	QB6=5-9	
i) Combined electricity & gas spend as a percentage of outgoings	Up to 4%	IF MID-POINT SUM OF QB3 & QB7 = Up to 4%	
	5-9%	IF MID-POINT SUM OF QB3 & QB7 = 5-9%	
	10%-19%	IF MID-POINT SUM OF QB3 & QB7 = 10%-19%	
	20%-29%	IF MID-POINT SUM OF QB3 & QB7 = 20%-29%	
	30% or more	IF MID-POINT SUM OF QB3 & QB7 = 30%+	
	Don't know	IF QB3 OR QB7 = Don't know	
j) Contract with current supplier	First ever	QC8=1	
	Renegotiated	QC8=2	
	Extended/Rolled-over	QC8=3	
k) Fixed-term contract	Yes	QC2=1	
	No	QC2=2	
l) Switching in last 5 years	Has switched	QE1=1-6	
	Hasn't switched	QE1=7 OR 99	
m) Switching in the last 12 months	Switched supplier in past 12 months	QE2=1	
	Attempted to switch supplier in past 12 months but was unable to do so	QE10a=1	
	Not switched supplier but switched tariff in past 12 months	QE9=1	
	Compared tariffs or suppliers in past 12 months but took no other action	[QC15=1 OR 2] AND [QE2=2 OR 99 OR QE1=7 OR 99] AND [QE10a=2 OR 99 OR UNANSWERED] AND [QE9=2 OR 99 OR UNANSWERED]	
	Took no action in past 12 months but switched supplier in past 5 years	[QC15=96] AND [QE2=2 OR 99] AND [QE10a=2 OR 99 OR UNANSWERED] AND [QE9=2 OR 99 OR UNANSWERED]	
	Took no action in past 12 months and haven't switched supplier in past 5 years	[QC15=96] AND [QE10a=2 OR 99 OR UNANSWERED] AND [QE9=2 OR 99 OR UNANSWERED] AND [QE1=7 OR 99]	
n) Approached by broker in last 12 months	Yes	QD3=2-7	
	No	QD3=1	

Crossbreak variable	Label	Definition: reference	Question
o) Broker used to choose contract	Approached by / Used	QD1=1	
	Main influence	QD2=1	
p) PCW <sup>2</sup> used to choose contract	Used	QD1=2	
	Main influence	QD2=2	

## 1.6 Defining the engagement outcome groups

The levels of engagement have been developed for the purposes of the 2016 report (published in 2017). This was possible due to additional questions being added to the questionnaire in 2016 (those are highlighted in the table here).

The definitions for the engagement levels were designed to work with 2016 data and were retrospectively fitted to 2015 and 2014 data to allow comparison of direction of travel. Due to questionnaire differences, the figures are not *directly* comparable, but direction of travel is commented on in the report.

	2016	2015 & 2014
<b>Switched in the last 12 months</b>	Have switched supplier in the last 12 months (QE2)	Have switched supplier in the last 12 months (E2)
<b>Some action taken in the last 12 months</b>	Have not switched supplier in the last 12 months (QE2) OR have not switched supplier in the last 5 years (QE1) <b>AND</b> <ul style="list-style-type: none"> <li>- Have switched tariff in last 12 months (QE9 – <b>NEW</b>)<sup>3</sup> <b>OR</b></li> <li>- Have attempted to switch supplier but were not able to in the last 12 months (QE10a – <b>NEW</b>) <b>OR</b></li> <li>- Have compared tariffs with current or other suppliers in the last 12 months (QC15)</li> </ul>	Have not switched supplier in the last 12 months (E2) OR have not switched supplier in the last 5 years (E1) <b>AND</b> <ul style="list-style-type: none"> <li>- Have attempted to switch supplier but were not able to in the last 12 months (E6 code 6 as a proxy for QE10a)<sup>4</sup> <b>OR</b></li> <li>- Have compared tariffs with current or other suppliers in the last 12 months (C15)</li> </ul>
<b>No action in the last 12 months but have switched in the past 5 years<sup>5</sup></b>	Have switched supplier in the last 5 years (QE1) <b>AND</b> <ul style="list-style-type: none"> <li>- Have not switched supplier in the last 12 months (QE2) <b>AND</b></li> <li>- Have not switched tariff in last 12 months (QE9 – <b>NEW</b>) <b>AND</b></li> </ul>	Have switched supplier in the last 5 years (E1) <b>AND</b> <ul style="list-style-type: none"> <li>- Have not switched supplier in the last 12 months (E2) <b>AND</b></li> <li>- Have not attempted to switch supplier in the last 12 months</li> </ul>

<sup>2</sup> Price comparison website

<sup>3</sup> This is a completely new question in 2016 – there is no proxy that can be used to estimate this in the 2015 or 2014 questionnaires, therefore, it is possible that the 'No action in the last 12 months' group in 2014 or 2015 includes customers who have switched tariff (they may not necessarily have compared deals to do this).

<sup>4</sup> While this question was used as a proxy and is not asked in exactly the same way, the proportions of those who attempted to switch in each year are broadly comparable reassuring that the proxy is suitable.

<sup>5</sup> Negative references (e.g. have not...) also include those who did not provide an answer or coded 'Don't know'.

	<ul style="list-style-type: none"> <li>- Have not attempted to switch supplier in the last 12 months (QE10a – <b>NEW</b>) <b>AND</b></li> <li>- Have not compared tariffs with current or other suppliers in the last 12 months (QC15)</li> </ul>	<ul style="list-style-type: none"> <li>(E6 code 6 as a proxy for QE10a) <b>AND</b></li> <li>- Have not compared tariffs with current or other suppliers in the last 12 months (C15)</li> </ul>
<p><b>No action in the last 12 months and have not switched in the last 5 years<sup>5</sup></b></p>	<p>Have not switched supplier in the last 5 years (QE1) <b>AND</b></p> <ul style="list-style-type: none"> <li>- Have not switched tariff in last 12 months (QE9 – <b>NEW</b>) <b>AND</b></li> <li>- Have not attempted to switch supplier in the last 12 months (QE10a – <b>NEW</b>) <b>AND</b></li> <li>- Have not compared tariffs with current or other suppliers in the last 12 months (QC15)</li> </ul>	<p>Have not switched supplier in the last 5 years (E1) <b>AND</b></p> <ul style="list-style-type: none"> <li>- Have not attempted to switch supplier in the last 12 months (E6 code 6 as a proxy for QE10a) <b>AND</b></li> <li>- Have not compared tariffs with current or other suppliers in the last 12 months (C15)</li> </ul>

## 2 Questionnaire

This is a tracking study so consistency in the interview across survey years is of paramount importance. However, a small number of changes were made to the questionnaire used in the 2015 survey to improve the flow of the interview and encourage accuracy in responses.

The 2016 questionnaire is as follows:

### SECTION 1: INTRODUCTION

Good morning/afternoon. Could I please speak to the person at your site responsible for dealing with energy contracts and bills?

My name is **[INSERT INTERVIEWER NAME]** and I am calling from Quadrangle, an independent research company, acting on behalf of Ofgem, the energy regulator. Ofgem is conducting an annual survey about the service businesses receive with regards to their gas and electricity contracts, and their experiences of switching energy suppliers.

**IF ASKED:** The findings provide Ofgem with a clear view of businesses' current energy usage, levels of satisfaction with energy suppliers and brokers and experience of contract renewal and switching. A report is published on Ofgem's website once the research is completed.

This survey lasts around 15 minutes, depending on your answers. Would you be able to help us?

#### IF NECESSARY:

I can reassure you that this is not a sales call and no one will try to sell anything to you as a result of taking part in this research.

#### IF NECESSARY, REASSURE:

- Any information you provide will be treated in strictest confidence, and answers you give will not be attributed to you or your organisation. Data is reported at aggregate level only.
- We strictly abide by the Market Research Society Code of Conduct.
- Your details have been provided from Sample Answers' commercial database.
- The contact at Quadrangle is **[NAME]** on **[NUMBER]**.
- If you would like to confirm that this research is genuine you can call **[NAME]** at Ofgem on **[NUMBER]**.
- We are happy to send you a PDF copy of the final report and a link to the publication on Ofgem's website.

#### IF YES: CONTINUE

**IF NO:** Would it be possible to call back at a more convenient time?

**ARRANGE CALL BACK THEN THANK AND CLOSE.**

#### ADDITIONAL OUTCOME CODES IF CLOSING:

Not a business	1
Domestic energy contract	2
Landlord or other arranges energy contract	3
Business no longer operating / closed down	4
Don't use gas or electricity / don't have a contract	5
Survey not relevant – other (specify)	6

## SECTION 2: SCREENING

### INTERVIEWER INSTRUCTIONS: READ OUT TO ALL

Thank you for agreeing to take part in this research.

### HIDDEN VARIABLE, SINGLE CODE, CODE FROM SAMPLE

**dQS1.** SIC 2007.

A. Agriculture, forestry and fishing	1
B. Mining and quarrying	2
C. Manufacturing	3
D. Electricity, gas, steam and air conditioning supply	4
E. Water supply; sewerage, waste management and remediation activities	5
F. Construction	6
G. Wholesale and retail trade; repair of motor vehicles and motorcycles	7
H. Transportation and storage	8
I. Accommodation and food service activities	9
J. Information and communication	10
K. Financial and insurance activities	11
L. Real estate activities	12
M. Professional, scientific and technical activities	13
N. Administrative and support service activities	14
O. Public administration and defence; compulsory social security	15
P. Education	19
Q. Human health and social work activities	17
R. Arts, entertainment and recreation	18
S. Other service activities	19
T. Activities of households as employers	20
U. Activities of extraterritorial organisations and bodies	21
Not provided	99

### ASK ALL, SINGLE CODE

**QA1.** Before we start to talk about energy suppliers, we would like to ask a couple questions about your business in order to help classify your answers. We have **[SIC CODE DESCRIPTION]** as a broad description of your company's activity. Does this sound about right to you?

### INTERVIEWER INSTRUCTIONS: DO NOT READ OUT

Yes	1
No	2
Not sure	99

### ASK IF SIC CODE NOT CONFIRMED, OPEN ENDED

**QA2.** What is the main business activity that you undertake?

### INTERVIEWER INSTRUCTIONS: PROBE WITH THESE QUESTIONS:

- What is the main product or service?
- What exactly is made or done?

**[WRITE IN]**

**INTERVIEWER INSTRUCTIONS: CODE THE APPROPRIATE SECTOR CODE BASED ON RESPONSE**

Micro-sector		Macro-sector
A. Agriculture, forestry and fishing	1	<i>Primary</i>
B. Mining and quarrying	2	
C. Manufacturing	3	
D. Electricity, gas, steam and air conditioning supply	4	
E. Water supply; sewerage, waste management and remediation activities	5	
F. Construction	6	<i>Construction</i>
G. Wholesale and retail trade; repair of motor vehicles and motorcycles	7	<i>Retail / wholesale</i>
H. Transportation and storage	8	<i>Transport, food, accommodation</i>
I. Accommodation and food service activities	9	
J. Information and communication	10	<i>Business services</i>
K. Financial and insurance activities	11	
L. Real estate activities	12	
M. Professional, scientific and technical activities	13	
N. Administrative and support service activities	14	
O. Public administration and defence; compulsory social security	15	<b>CLOSE</b>
P. Education	19	<i>Other services</i>
Q. Human health and social work activities	17	
R. Arts, entertainment and recreation	18	
S. Other service activities	19	
T. Activities of households as employers	20	<b>CLOSE</b>
U. Activities of extraterritorial organisations and bodies	21	
Not provided	99	

**ASK ALL, SINGLE CODE**

**QS4.** May I check how many paid employees your business currently employs across all sites, excluding owners and partners?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT, IF NECESSARY CLARIFY**

- **INCLUDE FULL AND PART TIME**
- **INCLUDE TEMPORARIES / CASUALS, BUT NOT AGENCY / SECONDED STAFF**
- **EXCLUDE SELF-EMPLOYED**
- **EXCLUDE OWNERS/PARTNERS, BUT OTHER DIRECTORS COUNT AS EMPLOYEES**

QS4_1. Number of employees		QS4_2. Business size
None – just me / me and business partner(s)	1	<i>No employees</i>
1 – owners and one other	2	<i>Small micro (1-4)</i>
2-4	3	
5-9	4	<i>Larger micro (5-9)</i>
10-19	5	<i>Small (10-49)</i>
20-29	6	
30-39	7	
40-49	8	
50+	9	<b>THANK AND CLOSE</b> <b>READ OUT:</b> Thank you – this research is concerned with businesses with fewer than 50 employees so we won't be able to continue the interview.
Don't know	99	
Refused	97	

**ASK ALL, SINGLE CODE**

**QS3.** Can I just check, do you have a **business** mains gas and/or mains electricity contract, which has been arranged by yourself, someone else in the business, or an energy broker?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT, CLARIFY RESPONSE IF NECESSARY**

Yes	1	<b>CONTINUE</b>
No – <u>domestic</u> or residential tariff / contract	2	<b>THANK AND CLOSE</b> <b>READ OUT:</b> Thank you - the survey is concerned with business contracts only so we won't be able to continue the interview.
No – contract <u>arranged by landlord or building management company</u>	3	<b>THANK AND CLOSE</b> <b>READ OUT:</b> Thank you - we need to speak to businesses that arrange their own energy contracts so we won't be able to continue the interview.
Don't have an energy contract	96	<b>THANK AND CLOSE</b> <b>READ OUT:</b> Thank you - we need to speak to businesses which have a business energy contract so we won't be able to continue the interview.
Don't know	99	
Refused	97	

**ASK ALL, SINGLE CODE**

**QS1.** And are you solely or jointly responsible for arranging mains gas and electricity contracts or paying these bills?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT**

Yes, solely responsible	1	<b>CONTINUE</b>
Yes, jointly responsible	2	
No – somebody else responsible	3	<b>THANK AND CLOSE</b> <b>ASK TO SPEAK TO THAT PERSON, TAKE NAME AND NUMBER (IF DIFFERENT)</b>
Not applicable – nobody in the business arranges energy contracts	4	<b>THANK AND CLOSE</b> <b>READ OUT:</b> Thank you but we need to speak to businesses that arrange their own gas or electricity contracts.
Not applicable – do not use either mains gas or mains electricity	5	

**ASK ALL, SINGLE CODE**

**QS5.** How many sites in Great Britain does your business operate from, including the site where you are now?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT**

<b>[WRITE IN WHOLE NUMBER 1-97]</b>	
More than one but I'm not sure how many	98
Don't know	99

**ASK IF HAS MORE THAN ONE SITE, SINGLE CODE**

**QS6.** And in how many sites do you have responsibility for the energy contracts and bills?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT, PROMPT IF NECESSARY-** Is it one of them, some of them, or all of them?

Responsible for only one site	1
Responsible for some sites	2
Responsible for all sites	3
Not sure	99

**ASK ALL, SINGLE CODE**

**QS7.** And **[IF RESPONSIBLE FOR MORE THAN ONE SITE:** on the sites you are responsible for,] does your business use mains electricity, mains gas, or both?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT**

Mains electricity only	1
Mains gas only	2
Both electricity and gas	3

**ASK IF USES BOTH ELECTRICITY AND GAS, SINGLE CODE**

**QS8.** Do you have responsibility for both electricity and gas contracts?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT**

Yes – Both electricity and gas	1
No – Mains electricity only	2
No – Mains gas only	3

**HIDDEN VARIABLE, DO NOT DISPLAY**

**dQS8.** Fuel to ask about in the survey

**DETERMINE ALLOCATION BASED ON THE FOLLOWING RULES**

- **IF RESPONSIBLE FOR ELECTRICITY ONLY, ALLOCATE CODE 1 (ELECTRICITY)**
- **IF RESPONSIBLE FOR GAS ONLY, ALLOCATE CODE 2 (GAS)**
- **IF RESPONSIBLE FOR BOTH, THEN HALF TO BE ALLOCATED TO CODE 1 (ELECTRICITY), HALF TO BE ALLOCATED TO CODE 2 (GAS)**

Electricity	1
Gas	2

**SECTION 3: GAS AND ELECTRICITY EXPENDITURE**
**ASK IF HAS RESPONSIBILITY FOR MAINS ELECTRICITY, SINGLE CODE**
**QB1.** Who supplies your electricity?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT**

Axis Telecom	1
Axpo UK	2
Business Energy Solutions (BES)	3
British Gas	4
Corona Energy	5
Cyclone Energy Supply Limited	6
Dong Energy	7
Dual Energy	8
E (Gas & Electricity) Ltd	9
E.ON	10
Ecotricity	11
EDF	12
Effortless Energy	13
Electraphase	14
Eneco Energy Trade BV	15
EPG Energy	16
Extra Energy	17
F&S Energy	18
Ganymede Energy Supply Limited (LoCo2)	19
Gazprom	20
GB Energy	21
GDF Suez	22
Gnergy	23
Good Energy	24
Green Energy	25
Green Star Energy	26
Haven Power	27
iSupply Energy	28
Kensington Power	29
Lightning Energy Supply	30
MA Energy	31
Marble Power	32
npower	33
Opus	34
OVO	35
Power4All	36
Scottish Power	37
Sing Power	38
SmartestEnergy	39
SSE (Scottish and Southern Energy)	40
Statkraft Markets	41
Tempus Energy	42
Total Gas and Power	43
Tramonto Power	44
Utilita	45
Utility Warehouse	46
Vattenfall Energy	47
Other (Please Specify)	98

Don't know	99
Refused	97

**ASK IF HAS RESPONSIBILITY FOR MAINS ELECTRICITY, SINGLE CODE**

**QB2.** **[IF MULTI-SITE:** Thinking about the sites you are responsible for,] Including VAT, approximately how much has your business spent on electricity in the last 12 months?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT, IF UNSURE –** Please provide your best estimate.

Less than £500	1
Between £500 and £1,000	2
Between £1,001 and £2,500	3
Between £2,501 and £5,000	4
Between £5,001 and £6,500	5
Between £6,501 and £10,000	6
Between £10,001 and £15,000	7
Between £15,001 and £25,000	8
Between £25,001 and £50,000	9
More than £50,000	10
Don't know	99
Refused	97

**ASK IF HAS RESPONSIBILITY FOR MAINS ELECTRICITY, SINGLE CODE**

**QB3.** And approximately what proportion of your total outgoings does that figure represent?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT, CODE RESPONSE IN THE APPROPRIATE BAND, IF RESPONDENT IS UNSURE –** Please provide your best estimate. Is it around half (50%), a third (33%), a quarter (25%)?

Up to 4%	1
Between 5% and 9%	2
Between 10% and 19%	3
Between 20% and 29%	4
Between 30% and 39%	5
Between 40% and 49%	6
50% or more	7
Don't know/ Can't remember	99

**ASK IF HAS RESPONSIBILITY FOR MAINS GAS, SINGLE CODE****QB5.** Who supplies your gas?**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT**

Axis Telecom	1
AXPO UK	2
Barrow Shipping	3
Better Energy	4
BP	5
British Gas	6
Business Energy Solutions (BES)	7
Contract Natural Gas	8
Corona Energy	9
Crown Energy	10
Daligas	11
D-Energi	12
Dong Energy	13
Eco Green Management	14
Economy Gas	15
Economy Power	16
Ecotricity	17
EDF	18
Engie	19
ENI	20
E.ON	21
Extra Energy	22
Flogas	23
Gazprom	24
GB Energy	25
Gnergy	26
Good Energy	27
Green Energy	28
Green Star Energy	29
I.A.Z.F.S Limited	30
Kensington Power	31
Marble Power	32
npower	33
Opal Gas	34
Opus	35
Regent Gas	36
Scottish Power	37
SSE (Scottish and Southern Energy)	38
Statoil	39
Switch Business Gas and Power	40
Telecom Plus	41
Total Energy Gas Supplies	42
Total Gas and Power	43
UK National Gas	44
United Gas & Power	45
Vayu	46
Xcel Energy	47
Other (Please Specify)	98
Don't know	99
Refused	97

**ASK IF HAS RESPONSIBILITY FOR MAINS GAS, SINGLE CODE**

**QB6.** **[IF MULTI-SITE:** Thinking about the sites you are responsible for,] Including VAT, approximately how much has your business spent on mains gas in the last 12 months?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT, IF UNSURE –** Please provide your best estimate.

Less than £500	1
Between £500 and £1,000	2
Between £1,001 and £2,500	3
Between £2,501 and £2,900	4
Between £2,901 and £5,000	5
Between £5,001 and £10,000	6
Between £10,001 and £15,000	7
Between £15,001 and £25,000	8
More than £25,000	9
Don't know	99
Refused	97

**ASK IF HAS RESPONSIBILITY FOR MAINS GAS, SINGLE CODE**

**QB7.** And what proportion of your total outgoings does that figure represent?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT, CODE RESPONSE IN THE APPROPRIATE BAND, IF RESPONDENT IS UNSURE –** Please provide your best estimate. Is it around half (50%), a third (33%), a quarter (25%)?

Up to 4%	1
Between 5% and 9%	2
Between 10% and 19%	3
Between 20% and 29%	4
Between 30% and 39%	5
Between 40% and 49%	6
50% or more	7
Don't know/ Can't remember	99

**SECTION 4: CURRENT CONTRACT****SHOW TO ALL:**

The rest of the questions will be about your current **[FUEL TYPE ALLOCATED]** contract.

**ASK ALL, SINGLE CODE**

**QC2.** A fixed term contract is one where you have to stay with the same supplier, on the same tariff, for a set period of time. Do you have a fixed term contract for your **[FUEL TYPE ALLOCATED]**?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT**

Yes	1
No	2
Not sure	99

**ASK IF HAS FIXED TERM CONTRACT, SINGLE CODE**

**QC3.** What is the total term of your current **[FUEL TYPE ALLOCATED]** contract? By that I mean the total length of your contract from its start date to when it's due to end, not just the time remaining.

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT**

12 months / a year	1
18 months / a year and a half	2
2 years	3
3 years	4
4 years	5
5 years or more	6
Other (Please Specify)	98
Not sure	99

**ASK IF HAS FIXED TERM CONTRACT, SINGLE CODE**

**QC4.** Do you know when your current **[FUEL TYPE ALLOCATED]** contract ends?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT, PROBE WHETHER KNOW EXACTLY (I.E. THE MONTH) OR APPROXIMATELY. IF THE RESPONDENT SAYS HOW MANY DAYS OR WEEKS, CODE AS 'Yes – I know approximately how long I have left'.**

Yes – I know the exact date	1
Yes – I know the month and year	2
Yes – I know approximately how long I have left	3
Don't know when it ends	99

**ASK IF HAS FIXED TERM CONTRACT, SINGLE CODE**

**QC5.** Do you know by when you have to give notice of termination to **[SUPPLIER]**, your **[FUEL TYPE ALLOCATED]** supplier?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT, PROBE WHETHER KNOW EXACTLY OR APPROXIMATELY.**

Yes – I know the exact date	1
Yes – I know the month and year	2
Yes – I know approximately how long I have left before the termination date	3
Don't know when it can be terminated	99

**ASK ALL, SINGLE CODE**

**QC6.** In how much detail, if at all, have you looked through your current **[FUEL TYPE ALLOCATED]** contract? Have you...?

**INTERVIEWER INSTRUCTIONS: READ OUT**

Read it in detail	1
Glanced at it or skim read it	2
Seen it, but not read it	3
Not seen or read it at all	4
Other (Please specify)	98
Don't know	99

**ASK IF READ OR GLANCED AT CONTRACT, SINGLE CODE PER ROW, RANDOMISE ORDER OF STATEMENTS**

**QC7.** Thinking about your current **[FUEL TYPE ALLOCATED]** contract document, how satisfied or dissatisfied are you with the following aspects of it? Please answer on a scale of 1 to 5 where 1 is 'very dissatisfied' and 5 is 'very satisfied'.

**INTERVIEWER INSTRUCTIONS: READ OUT STATEMENTS, PROMPT SCALE IF NECESSARY**

		Very dissatisfied				Very satisfied	Don't know
<b>QC7_1</b>	The length / size of the contract document	1	2	3	4	5	99
<b>QC7_2</b>	The clarity of the contract document overall	1	2	3	4	5	99
<b>QC7_3</b>	The clarity of costs and charges	1	2	3	4	5	99
<b>QC7_4</b>	The clarity on the duration of the contract, and renewal dates	1	2	3	4	5	99

**ASK ALL, SINGLE CODE**

**QC8.** Is the **[FUEL TYPE ALLOCATED]** contract you currently have with **[SUPPLIER]** your first ever contract with them, a re-negotiated contract, or is it an extension or rollover from a previous contract?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT**

First ever	1
Re-negotiated	2
Extension / Rollover	3
Not sure	99

**ASK IF HAS EXTENSION/ROLLOVER CONTRACT, SINGLE CODE**

**QC10.** Were you made aware that this contract was being extended or rolled over?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT**

Yes	1
No	2
Don't know	99

**ASK IF HAS RENEGOTIATED CONTRACT OR EXTENDED/ROLLED-OVER, SINGLE CODE**

**QC11.** On a scale of 1 to 5, where 1 is 'very satisfied' and 5 is 'very dissatisfied', how satisfied or dissatisfied were you with the experience of **[re-negotiating]** **[extending or rolling over]** the contract with your **[FUEL TYPE ALLOCATED]** supplier?

**INTERVIEWER INSTRUCTIONS: PROMPT SCALE OR CLARIFY RESPONSE AS NECESSARY. NOTE SCALE DIRECTION – 1=SATISFIED TO 5=DISSATISFIED**

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

**ASK ALL, SINGLE CODE**

**QF1.** When, if at all, do you review your **[FUEL TYPE ALLOCATED]** contract and / or tariff?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT, CLARIFY RESPONSE IF NECESSARY**

When receiving a bill	1
Just before receiving a bill	8
When the contract comes up for renewal	2
Just before contract comes up for renewal	9
At a fixed time each year	3
At different times in a year, regardless of contract or bill date	4
When prompted to do so by a broker	5
When prompted to do so by the supplier	6
When contacted by other suppliers	7
Other (Please specify)	98
Never	96

**ASK ALL, SINGLE CODE**

**QC13.** Have you received a/an **[FUEL TYPE ALLOCATED]** bill in the last 12 months?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT**

Yes	1
No	2
Can't remember	99

**ASK ALL, SINGLE CODE PER ROW**

**QC14.** The last time you received your **[FUEL TYPE ALLOCATED]** bill, do you recall seeing...

**INTERVIEWER INSTRUCTIONS: READ OUT STATEMENTS**

		Yes	No	Can't remember
<b>QC14_1</b>	Your contract end date	1	2	99
<b>QC14_2</b>	The date you need to give notice by to re-negotiate or terminate your contract	1	2	99

**ASK ALL, SINGLE CODE**

**QC12a.** Have you received your **[FUEL TYPE ALLOCATED]** contract renewal letter in the last 12 months?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT**

Yes	1
No	2
Can't remember	99

**ASK IF RECEIVED RENEWAL LETTER, SINGLE CODE**

**QC12b.** In how much detail, if at all, have you looked at the contract renewal letter? Have you...?

**INTERVIEWER INSTRUCTIONS: READ OUT**

Read it in detail	1
Glanced at it or skim read it	2
Seen it, but not read it	3
Can't remember	99

**ASK IF AT LEAST GLANCED AT RENEWAL LETTER, SINGLE CODE ONLY FOR EACH**

**QC12c.** In the contract renewal letter do you recall seeing information about ...?

**INTERVIEWER INSTRUCTIONS: READ OUT STATEMENTS ONLY, PROMPT ANSWER OPTIONS IF NECESSARY**

		Yes	No	Can't remember
<b>QC12c_1</b>	Your current energy prices or tariff information?	1	2	99
<b>QC12c_2</b>	Information about your energy consumption?	1	2	99

**ASK IF RECALLS SEEING INFORMATION ABOUT PRICES AND/OR CONSUMPTION IN RENEWAL LETTER, MULTI CODE EXCEPT IF NONE/DON'T KNOW**

**QC12d.** Did you use the information about your [prices] [consumption] [prices and consumption] to do any of the following?

**INTERVIEWER INSTRUCTIONS: READ OUT**

Compare prices or get quotes from suppliers directly	1
Ask a broker to compare prices or get quotes from suppliers	2
Take other action (Please specify)	98
None of these <b>[SINGLE CODE]</b> <b>[DO NOT READ OUT]</b>	96
Don't know <b>[SINGLE CODE]</b> <b>[DO NOT READ OUT]</b>	99

**ASK ALL, MULTI CODE EXCEPT IF NONE** **QC15.** And thinking about the past 12 months, have you done any of the following in relation to your **[FUEL TYPE ALLOCATED]** contract?

**INTERVIEWER INSTRUCTIONS: READ OUT STATEMENTS**

Looked into tariffs offered by other suppliers	1
Looked at other tariffs with my current supplier	2
None of these <b>[SINGLE CODE]</b>	96

**ASK IF LOOKED AT OTHER TARIFFS, OR RECALLED CONTRACT END DATE OR TERMINATION DATE FROM A BILL, SINGLE CODE**

**QC16.** Earlier you said you noticed your contract end date, or the date you needed to give notice by on your **[FUEL TYPE ALLOCATED]** bill. Did this prompt you or not to look into other suppliers or tariffs?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT**

Yes	1
No	2
Can't remember	99

**ASK IF LOOKED AT OTHER TARIFFS, MULTI CODE EXCEPT CODE DON'T KNOW, RANDOMISE ORDER OF STATEMENTS**

**QC17.** Have you consulted any of the following to find out about other tariff options, or tariffs offered by other suppliers?

**INTERVIEWER INSTRUCTIONS: READ OUT**

A broker	1
A price comparison site	2
Price quotation tool on any supplier's website	3
Your current supplier	4
Your previous supplier	5
Other suppliers	6
Don't know <b>[DO NOT READ OUT] [SINGLE CODE]</b>	99
None of these <b>[DO NOT READ OUT] [SINGLE CODE]</b>	96

**SECTION 5: SWITCHING EXPERIENCE**

**ASK ALL, SINGLE CODE**

**QE1.** How many times has your business switched **[FUEL TYPE ALLOCATED]** supplier in the last five years?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT, PROMPT AS NECESSARY. CODE ONE ONLY**

Once	1
Twice	2
3 times	3
4 times	4
5 times	5
More than 5 times	6
Have not switched in the last five years	7
Don't know	99

**ASK IF HAS SWITCHED SUPPLIER IN THE LAST 5 YEARS, SINGLE CODE**

**QE2.** Has your business switched **[FUEL TYPE ALLOCATED]** supplier in the last 12 months?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT**

Yes	1
No	2
Don't know	99

**ASK IF HAS SWITCHED SUPPLIER IN THE LAST 5 YEARS AND IN THE LAST 12 MONTHS, OPEN NUMERIC AND SINGLE CODE**

**QE4.** Thinking about the last time you switched **[FUEL TYPE ALLOCATED]** supplier, approximately how many suppliers did you or your broker contact for quotes?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT, ENCOURAGE TO PROVIDE AN ESTIMATE IF UNSURE**

<b>[WRITE IN NUMBER]</b>	
Can't remember	99

**ASK IF HAS SWITCHED SUPPLIER IN THE LAST 5 YEARS AND IN THE LAST 12 MONTHS, MULTI CODE EXCEPT IF NONE OR DON'T KNOW, RANDOMISE ORDER OF STATEMENTS**

**QE5.** Which, if any, of the following prompted you to switch [FUEL TYPE ALLOCATED] supplier on the last occasion? Was it...?

**INTERVIEWER INSTRUCTIONS: READ OUT, CODE ALL THAT APPLY**

A price increase from your previous supplier	1
You found or were offered a lower price contract or tariff	2
You were not satisfied with the customer service provided by your previous supplier	3
The new supplier promised better customer service	4
The new supplier offered greater assistance on energy reduction initiatives	5
You received a renewal notice from your existing supplier	6
Knowing your contract was coming to an end	7
A broker/consultant recommended switching	8
<b>DISPLAY IF HAS ELECTRICITY AND GAS:</b> Supplier offered savings for having a combined gas and electricity contract	9
Any other reason (Please specify)	98
None of these [SINGLE CODE] [DO NOT READ OUT]	96
Don't know [SINGLE CODE] [DO NOT READ OUT]	99

**ASK IF HAS NOT SWITCHED SUPPLIER IN THE LAST 5 YEARS OR DOESN'T KNOW, SINGLE CODE**

**QE3.** Have you ever considered switching [FUEL TYPE ALLOCATED] supplier?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT**

Yes	1
No	2
Don't know	99

**ASK IF HAS SWITCHED SUPPLIER IN THE LAST 5 YEARS BUT NOT IN THE LAST 12 MONTHS OR DOESN'T KNOW, OR HAS NOT SWITCHED SUPPLIER IN THE LAST 5 YEARS OR DOESN'T KNOW, AND HAS CONSIDERED SWITCHING SUPPLIER, SINGLE CODE**

**QE10a.** Have you attempted to switch [FUEL TYPE ALLOCATED] supplier in the last 12 months, but something prevented the switch from going through?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT**

Yes	1
No	2
Can't remember	99

**ASK IF HAS ATTEMPTED TO SWITCH SUPPLIER BUT PREVENTED, MULTI CODE EXCEPT CODE NONE OR DON'T KNOW, RANDOMISE ORDER OF STATEMENTS**

**QE10b.** And which, if any, of the following prevented the switch from going through? Was it that...?

**INTERVIEWER INSTRUCTIONS: READ OUT, CODE ALL THAT APPLY**

The termination notice was not handed in on time	1
A better deal was re-negotiated so there was no need to switch	2
You were tied to your existing contract	3
You did not start looking to switch early enough	4
It was too complex and time consuming to find a new tariff or supplier	5
The existing supplier prevented switching because the account was in debt	6
Switching dates were not clear	7
The switching process was not clear	8
You wanted to avoid exit fees for leaving your current contract	9
Your existing supplier prevented the switch from going through	10
Other reason (Please specify)	98
None of these <b>[SINGLE CODE]</b> <b>[DO NOT READ OUT]</b>	96
Don't know <b>[SINGLE CODE]</b> <b>[DO NOT READ OUT]</b>	99

**ASK IF HAS SWITCHED SUPPLIER IN THE LAST 5 YEARS BUT NOT IN THE LAST 12 MONTHS OR DOESN'T KNOW, OR HAS NOT SWITCHED SUPPLIER IN THE LAST 5 YEARS, SINGLE CODE**

**QE9.** Have you switched **[FUEL TYPE ALLOCATED]** tariff in the last 12 months, but stayed with the same supplier?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT**

Yes	1
No	2
Can't remember	99

**ASK IF HAS SWITCHED SUPPLIER IN THE LAST 5 YEARS BUT NOT IN THE LAST 12 MONTHS OR DOESN'T KNOW, AND HAS NOT ATTEMPTED TO SWITCH SUPPLIER IN THE LAST 12 MONTHS, MULTI CODE EXCEPT CODE NONE OR DON'T KNOW, RANDOMISE ORDER OF STATEMENTS**

**QE6.** Which of the following reasons, if any, contributed to why you haven't switched in the last 12 months?

**INTERVIEWER INSTRUCTIONS: READ OUT, CODE ALL THAT APPLY**

You were broadly satisfied with existing supplier	1
You did not believe switching would result in significant savings	2
You were tied to your existing contract	3
It was too complex and time consuming to find a new tariff or supplier	5
Comparing prices between suppliers was too difficult	10
You wanted to avoid exit fees for leaving your current contract	11
It was too difficult to switch	12
Switching is too much hassle	13
Switching from one supplier to another would take too long	14
Any other reason (Please specify)	98
None of these <b>[SINGLE CODE]</b> <b>[DO NOT READ OUT]</b>	96
Don't know <b>[SINGLE CODE]</b> <b>[DO NOT READ OUT]</b>	99

**ASK IF HAS SWITCHED SUPPLIER IN THE LAST 5 YEARS AND IN THE LAST 12 MONTHS OR HAS ATTEMPTED TO SWITCH SUPPLIER IN THE LAST 12 MONTHS, SINGLE CODE PER ROW, RANDOMISE ORDER OF STATEMENTS**

**QE7.** In terms of the process of switching supplier, to what extent do you agree or disagree with the following aspects of it? Please answer on a scale of 1 to 5, where 1 is strongly disagree and 5 is strongly agree.

**INTERVIEWER INSTRUCTIONS: READ OUT STATEMENTS, PROBE SCALE IF NECESSARY**

		1-Strongly disagree				5-Strongly agree	Don't know
<b>QE7_1</b>	It is easy to compare prices between suppliers	1	2	3	4	5	99
<b>QE7_2</b>	The process of switching suppliers is easy	1	2	3	4	5	99
<b>QE7_3</b>	The time between choosing a new supplier and switching to them is too long	1	2	3	4	5	99
<b>QE7_4</b>	The expected savings do not always materialise	1	2	3	4	5	99

**ASK IF HAS SWITCHED TARIFF WITH THE SAME SUPPLIER, SINGLE CODE PER ROW, RANDOMISE ORDER OF STATEMENTS**

**QE7b.** In terms of the process of switching tariff, to what extent do you agree or disagree with the following aspects of it? Please answer on a scale of 1 to 5, where 1 is strongly disagree and 5 is strongly agree.

**INTERVIEWER INSTRUCTIONS: READ OUT STATEMENTS, PROBE SCALE IF NECESSARY**

		1-Strongly disagree				5-Strongly agree	Don't know
<b>QE7b_1</b>	It is easy to compare prices between tariffs	1	2	3	4	5	99
<b>QE7b_2</b>	The process of switching tariffs is easy	1	2	3	4	5	99
<b>QE7b_3</b>	The time between choosing a new tariff and switching to it is too long	1	2	3	4	5	99
<b>QE7b_4</b>	The expected savings do not always materialise	1	2	3	4	5	99

**ASK ALL, OPEN NUMERIC AND SINGLE CODE**

**QE8a.** **[IF RESPONSIBLE FOR BOTH ELECTRICITY AND GAS:** Now we would like you to think about your gas and electricity bills together.] Approximately, what would be the minimum amount of money you would have to save on your annual **[IF RESPONSIBLE FOR BOTH ELECTRICITY AND GAS: gas and electricity]** **[IF RESPONSIBLE FOR ELECTRICITY ONLY: electricity]** **[IF RESPONSIBLE FOR GAS ONLY: gas]** bill when switching supplier to make it worth doing?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT, ENCOURAGE TO PROVIDE BEST ESTIMATE**

%	<b>[WRITE IN NUMBER 1-100]</b>	
£	<b>[WRITE IN NUMBER IN WHOLE POUNDS]</b>	
I'm not concerned about the savings		96
Don't know		99

**ASK ALL, OPEN NUMERIC AND SINGLE CODE**

**QE8c.** How much time do you think it would take you to investigate offers and arrange to switch your **[IF RESPONSIBLE FOR ELECTRICITY AND GAS: gas and electricity]** **[IF RESPONSIBLE FOR ELECTRICITY ONLY: electricity]** **[IF RESPONSIBLE FOR GAS ONLY: gas]** supplier? Do not include the time it would take for the switch to go through, but rather the time it would take for you to compare suppliers offers and agree that you want the switch to take place.

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT, CLARIFY ANSWER IF NECESSARY**

Minutes	<b>[WRITE IN NUMBER]</b>	
Hours	<b>[WRITE IN NUMBER]</b>	
Days	<b>[WRITE IN NUMBER]</b>	
Don't know		99

**SECTION 6: USE OF BROKERS****ASK ALL, MULTI CODE EXCEPT CODES NONE OR DON'T KNOW, RANDOMISE ORDER**

**QD1.** When choosing your current **[FUEL TYPE ALLOCATED]** contract or tariff, did you consult or were you approached by any of the following? **[IF QC8=2 OR 3: By current contract I mean the original contract you set up.]**

**INTERVIEWER INSTRUCTIONS: READ OUT**

A broker		1
A price comparison site		2
Price quotation tool on any supplier's website		3
Your current supplier		4
Your previous supplier		5
Other suppliers		6
Don't know <b>[DO NOT READ OUT]</b> <b>[SINGLE CODE]</b>		99
None of these <b>[DO NOT READ OUT]</b> <b>[SINGLE CODE]</b>		96

**ASK ALL, SINGLE CODE, RANDOMISE ORDER**

**QD2.** And how did you mainly choose your current **[FUEL TYPE ALLOCATED]** contract or tariff?

**INTERVIEWER INSTRUCTIONS: READ OUT IF NECESSARY**

Through a broker		1
Through a price comparison site		2
Price quotation tool on any supplier's website		3
You consulted your current supplier directly		5
You consulted a range of suppliers		6
Anything else (Please specify)		7
Don't know <b>[DO NOT READ OUT]</b>		99
None of these <b>[DO NOT READ OUT]</b>		96

**ASK IF USED A BROKER, SINGLE CODE**

**QD2b.** How satisfied or dissatisfied were you overall with the experience of using the price comparison website when switching to your current **[FUEL TYPE ALLOCATED]** contract or tariff? Were you...

**INTERVIEWER INSTRUCTIONS: READ OUT**

Very satisfied	1
Quite satisfied	2
Neither satisfied nor dissatisfied	3
Quite dissatisfied	4
Very dissatisfied	5
Don't know <b>[DO NOT READ OUT]</b>	6

**ASK IF BROKER IS MAIN INFLUENCE, SINGLE CODE**

**QD5.** Did the broker charge you for their services?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT**

Yes	1
No	2
Can't remember	99

**ASK ALL, SINGLE CODE**

**QD3.** Approximately how many times, if at all, have you been approached by a broker in the last 12 months?

**INTERVIEWER INSTRUCTIONS: PROMPT AS NECESSARY**

None / not approached in last 12 months	1
1 - 5 times	2
6 - 10 times	3
11 – 20 times	4
21 – 30 times	5
31 – 50 times	6
More than 50 times/too many times to count	7
Don't know	99

**ASK IF HAS BEEN APPROACHED BY A BROKER IN THE LAST 12 MONTHS, SINGLE CODE PER ROW**

**QD4.** Thinking about the last time you were approached by a broker, did they...?

**INTERVIEWER INSTRUCTIONS: READ OUT STATEMENTS**

		Yes	No	Unsure
<b>QD4_1</b>	Identify themselves clearly as an energy broker	1	2	99
<b>QD4_2</b>	Provide accurate information about the services they offered	1	2	99
<b>QD4_3</b>	Have a professional tone	1	2	99
<b>QD4_4</b>	State clearly whether there was a cost for their services	1	2	99

**ASK IF BROKER IS MAIN INFLUENCE**

**QD10.** Overall, how satisfied were you with the service provided by your broker when changing to your current **[FUEL TYPE ALLOCATED]** contract or tariff?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT, PROMPT SCALE IF NECESSARY**

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

**ASK ALL, SINGLE CODE**

**QD11.** How would you describe your overall view of energy brokers on a scale of 1 to 5, where 1 is very negative and 5 is very positive?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT, PROMPT SCALE IF NECESSARY**

1 - Very negative	1
2 - Quite negative	2
3 - Neutral, neither positive nor negative	3
4 - Quite positive	4
5 - Very positive	5
Don't know	99

## SECTION 7: SUPPLIER CONTACT

**SHOW TO ALL:**

The next few questions are specifically about your experience of contacting your current **[FUEL TYPE ALLOCATED]** supplier.

**ASK ALL, MULTI CODE EXCEPT CAN'T REMEMBER WHICH IS EXCLUSIVE**

**QF4.** Have you contacted your **[FUEL TYPE ALLOCATED]** supplier in the last year about any of the following?

**INTERVIEWER INSTRUCTIONS: READ OUT**

A complaint	1
A query or for information	2
Anything else (Please specify)	98
Can't remember	99
Have not contacted	96

**ASK IF HAS CONTACTED SUPPLIER, SINGLE CODE PER ROW, RANDOMISE ORDER OF STATEMENTS**

**QF7.** Thinking about the last time you contacted your **[FUEL TYPE ALLOCATED]** supplier, how would you rate your level of satisfaction with the following on a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied...

**INTERVIEWER INSTRUCTIONS: READ OUT STATEMENTS, PROMPT SCALE IF NECESSARY**

		Very dissatisfied				Very satisfied	Don't know	Not applicable
<b>QF7_1</b>	The time it took to respond to your query or complaint	1	2	3	5	5	99	96
<b>QF7_2</b>	The solution they offered	1	2	3	5	5	99	96
<b>QF7_3</b>	Their follow up service/communication	1	2	3	5	5	99	96

**SECTION 8: OVERALL EXPERIENCE OF THE MARKET AND SUPPLIERS**
**ASK ALL, SINGLE CODE PER ROW, RANDOMISE ORDER OF STATEMENTS**

**QH1.** Thinking about your current **[FUEL TYPE ALLOCATED]** supplier, how would you rate your level of satisfaction with the following on a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied...

**INTERVIEWER INSTRUCTIONS: READ OUT STATEMENTS, PROMPT SCALE IF NECESSARY**

		Very dissatisfied				Very satisfied	Don't know	Not applicable
<b>QH1_1</b>	Value for money	1	2	3	5	5	99	96
<b>QH1_2</b>	Information provided on available tariffs and options	1	2	3	5	5	99	96
<b>QH1_3</b>	The overall service provided	1	2	3	5	5	99	96

**ASK ALL, SINGLE CODE**

**QH2.** How likely or not is it that you would recommend your current **[FUEL TYPE ALLOCATED]** supplier to another business? Please indicate how likely on a scale of 0 to 10, where 0 is not at all likely and 10 is extremely likely.

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT, PROMPT SCALE IF NECESSARY**

0 - Not at all likely	0
1	1
2	2
3	3
4	4
5	5
6	6
7	7
8	8
9	9

10 - Extremely likely	10
Don't know	99
Refused	97

**ASK ALL, SINGLE CODE PER ROW, RANDOMISE ORDER OF STATEMENTS**

**QH3.** Thinking now about the energy market in general, how would you rate your level of satisfaction with the following on a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied...

**INTERVIEWER INSTRUCTIONS: READ OUT EACH STATEMENT, PROMPT SCALE IF NECESSARY**

		Very dissatisfied				Very satisfied	Don't know	Not applicable
<b>QH3_1</b>	Competitiveness of prices	1	2	3	5	5	99	96
<b>QH3_2</b>	The variety of options from different suppliers	1	2	3	5	5	99	96
<b>QH3_3</b>	The ease of comparing prices	1	2	3	5	5	99	96
<b>QH3_4</b>	The sales approach by energy suppliers	1	2	3	5	5	99	96
<b>QH3_5</b>	The ease of switching suppliers	1	2	3	5	5	99	96

**ASK ALL, SINGLE CODE**

**QH4.** To what extent do you trust or distrust energy suppliers to be fair in the way they deal with business customers?

**INTERVIEWER INSTRUCTIONS: CLARIFY ANSWER IF NECESSARY**

Completely trust	1
Tend to trust	2
Neither trust nor distrust	3
Tend to distrust	4
Completely distrust	5
Don't know	99

**SECTION 9: CLASSIFICATION**

**SHOW TO ALL:**

Finally, I have just a few more questions for classification purposes.

**ASK ALL, SINGLE CODE**

**QG1.** A smart meter is a unit that is installed by a professional engineer from your gas or electricity company. The meter communicates with energy suppliers to send and receive information about the amount of energy being used. Does your business have one of these?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT**

Yes	1
No	2
Not sure	99

**ASK ALL, SINGLE CODE**

**Q18.** Can I ask how many years has your business been trading for?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT**

<b>[WRITE IN WHOLE NUMBER]</b>	
Don't know	99

**ASK ALL, OPEN NUMERIC AND SINGLE CODE**

**Q11A.** Can you please tell me the approximate turnover of your business in the past 12 months?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT, ASK FOR BEST ESTIMATE IF UNSURE**

£	<b>[WRITE IN NUMBER IN WHOLE POUNDS]</b>	
Don't know		99
Refused		97

**ASK IF TURNOVER NOT PROVIDED, SINGLE CODE**

**Q11B.** Are you able to tell me if your turnover falls into any of the following ranges?

**INTERVIEWER INSTRUCTIONS: READ OUT UNTIL ANSWER GIVEN**

Less than £73,000	1
£73,000 - £99,999	2
£100,000 - £199,999	3
£200,000 - £299,999	4
£300,000 - £499,999	5
£500,000 – £749,999	6
£750,000 - £999,999	7
£1m - £1.99m	8
£2m - £4.99m	9
£5m or more	10
Don't know	99
Refused	97

**ASK ALL, MULTI CODE EXCEPT CODE 3 WHICH IS EXCLUSIVE**

**Q12a.** That's the end of the survey, thank you very much for your time. As a result of taking part in this survey, Citizens Advice, who work in partnership with Ofgem on helping business customers switch suppliers more easily, may wish to undertake follow-up interviews with businesses to explore some of these issues in more depth. To this end, Quadrangle, or another agency, may need to re-contact you on their behalf. Would it be acceptable to you to contact you by telephone or email?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT. RECORD PHONE NUMBER OR EMAIL ADDRESS AS APPROPRIATE IF RESPONDENT AGREES TO BE RE-CONTACTED.**

Yes, by telephone (Enter phone number)	1
Yes, by email (Enter email address)	2
No, do not re-contact <b>[SINGLE CODE]</b>	3

**ASK IF ACCEPTABLE TO BE RECONTACTED, SINGLE CODE**

**Q12b.** Are you happy to have your answers to this survey attributed to you in the event that you are re-contacted for any follow-up research?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT. RECORD PHONE NUMBER OR EMAIL ADDRESS AS APPROPRIATE IF RESPONDENT AGREES TO BE RE-CONTACTED.**

Yes	1
No	99

**ASK ALL, SINGLE CODE**

**Q13.** Would you be interested in receiving a copy of the survey findings by email? The report is likely to be published early to mid-2017.

**IF YES & EMAIL NOT RECORDED AT PREVIOUS QUESTION:** Could I take your email address please?

**INTERVIEWER INSTRUCTIONS: DO NOT READ OUT. RECORD EMAIL ADDRESS IF NOT RECORDED IN PREVIOUS QUESTION.**

Yes (Enter email address)	1
No	99

**THANK AND CLOSE**

This survey has been carried out by Quadrangle, on behalf of Ofgem. Thank you very much for your time.

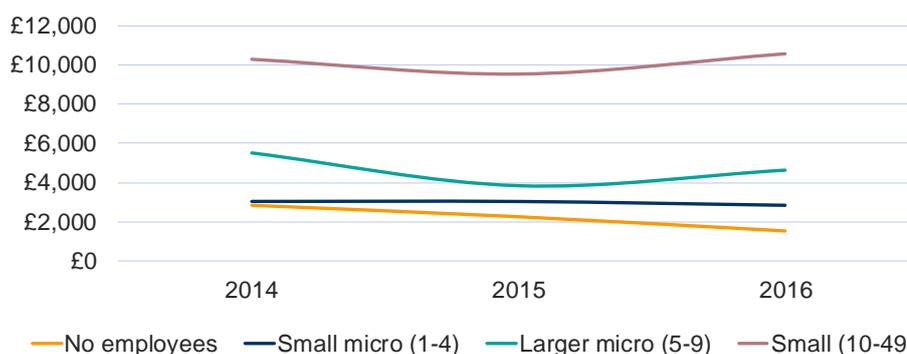
If you have any questions about the research you can call [NAME] on [NUMBER]. If you wish to check the bona-fide nature of Quadrangle I can give you the number of The Market Research Society with whom we are registered: 0500 396 999.

### 3 Additional charts and tables

The following charts and tables are provided in addition to those included in the full report.<sup>6</sup>

*Figure A.1: Average annual energy spend fluctuations, 2014-2016*

Small micro businesses experienced the least fluctuation in energy spend in the last 3 years.



QB2. Thinking about the site(s) you are responsible for, including VAT, approximately how much has your business spent on electricity in the last 12 months?

**Bases:** Excluding 'Don't Knows' – No employees: 2014 (226), 2015 (244), 2016 (251); Small micro (1-4): 2014 (424), 2015 (470), 2016 (400); Larger micro (5-9): 2014 (384), 2015 (333), 2016 (297); Small (10-49): 2014 (446), 2015 (445), 2016 (301)

*Figure A.2: Expected savings from switching supplier per hour of investigation time by employee size, 2016*

○ Significantly higher / lower at 95% level  
 □ 2016 results – against avg. within question

	Total	No employees	Small micro (1-4)	Larger micro (5-9)	Small (10-49)
Expected savings to make switching worthwhile	£208	£134	£214	£249	£291
Hours it would take to investigate options (avg.)	7.1 hrs	6.2 hrs	7.1 hrs	7.7 hrs	8.3 hrs
Expected savings per hour of investigation	£29 / hr	£22 / hr	£30 / hr	£32 / hr	£35 / hr
No response / Don't know	34%	35%	34%	35%	35%

QE8a. Approximately what would be the minimum amount of money you would have to save on your gas and/or electricity bill(s) when switching supplier to make it worth doing? QE8c. How much time do you think it would take to investigate offers and arrange to switch your gas/electricity supplier? Only include the time before the switch actually starts.

**Bases:** All - Total 2016 (1254); No employees: 2016 (252); Small micro (1-4): 2016 (401); Larger micro (5-9): 2016 (300); Small (10-49): 2016 (301)

<sup>6</sup> The full report, available on [Ofgem's website](#), includes charts and tables that are critical in supporting the findings. Those included here are supplementary to the main findings.

Figure A.3: Expected savings from switching supplier per hour of investigation time by levels of engagement, 2016

○ Significantly higher / lower at 95% level  
 □ 2016 results – against avg. within question

	Total	In the last 12 months					Not switched in last 5 years
		Switched supplier	Attempted to switch supplier	Switched tariff	Compared but no other action	No action	
Expected savings to make switching worthwhile	£208	£209	£251	£213	£193	£197	£208
Hours it would take to investigate options (avg.)	7.1 hrs	7.9 hrs	9.2 hrs	7.7 hrs	6.1 hrs	6.7 hrs	6.2 hrs
Expected savings per hour of investigation	£29 / hr	£26 / hr	£27 / hr	£28 / hr	£32 / hr	£29 / hr	£34 / hr
No response / Don't know	34%	30%	25%	27%	33%	38%	49%
<i>Base</i>	1,254	278	82	325	187	204	216

QE8a. Approximately what would be the minimum amount of money you would have to save on your gas and/or electricity bill(s) when switching supplier to make it worth doing? QE8c. How much time do you think it would take to investigate offers and arrange to switch your gas/electricity supplier? Only include the time before the switch actually starts.

**Bases:** Please see the bottom row in the table. Please see crossbreak *m* on pg. 9 for exact definitions of the levels of engagement.

Figure A.4: Activity among those with varying levels of engagement, 2016

Bills and brokers appear to have been most likely to encourage engagement in the energy market.

○ Significantly higher / lower at 95% level  
 □ 2016 results – against avg. within question

Column %	Total	Didn't compare	Compared deals	Switched tariff	Switched supplier
<b>Contract (read or skimmed)</b>	72%	65%	79%	76%	75%
<b>Renewal letter (read or skimmed)</b>	84%	76%	89%	86%	88%
<b>Bills (recall some detail)</b>	36%	28%	44%	32%	47%
<b>Broker (consulted or approached by)</b>	50%	45%	56%	51%	63%
<i>Base</i>	558-1254	186-622	372-632	223-325	137-278

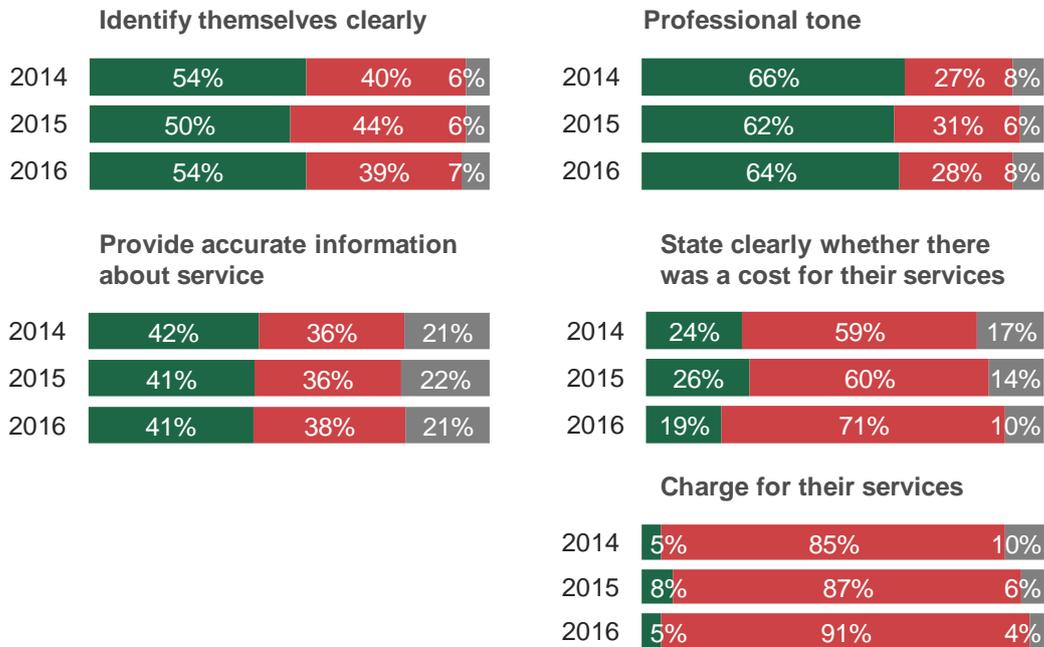
QC14. The last time you received your bill, do you recall seeing - Your contract end date / The date you need to give notice by...? QC15. And thinking about the past 12 months, have you done any of the following in relation to your energy contract? QE9. Have you switched energy tariff in the last 12 months, but stayed with the same supplier? QE2. Has your business switched energy supplier in the last 12 months?

**Bases:** Please see the bottom row in the table.

Figure A.5: Satisfaction with brokers' services if approached, 2014-2016

**Did the broker...?**

■ Yes ■ No ■ Unsure



QD4. Thinking about the last time you were approached by a broker, did they...? Bases: 2014 (1110), 2015 (1234), 2016 (1052). QD5. Did the broker charge you for their services?

Bases: Used / was approached by a broker to change to their existing contract; 2014 (420), 2015 (445), 2016 (374).

Figure A.6: Top 3 reasons for switching supplier in the last 12 months – further detail, 2016

▲▼ Significantly higher / lower at 95% level  
2016 vs. 2015

<b>Were offered or found a better priced contract /tariff</b>	85%	<ul style="list-style-type: none"> <li>▶ 44% used a broker vs. 16% used a price comparison site, 19% still consulted their current supplier</li> <li>▶ Significantly more likely to have looked into offers and tariffs offered by a range of suppliers (71% vs. 49% overall)</li> </ul>
<b>Knew contract was coming to an end</b>	73%	<ul style="list-style-type: none"> <li>▶ Least likely among small micros (who are significantly less likely to switch this year than in 2015 suggesting this is an issue for them)</li> </ul>
<b>Received a renewal notice from their existing supplier</b>	58%	<ul style="list-style-type: none"> <li>▶ Significantly more likely to have read in detail, or skimmed over, the renewal letter (92% vs. 84% overall)</li> <li>▶ More likely to have been a reason to switch among businesses with no employees than other business sizes (74%)</li> </ul>

QE5. Which, if any, of the following prompted you to switch energy supplier on the last occasion? Was it...?

Bases: Have switched in the last 12 months - 2016 (278).

Figure A.7: Top 4 reasons for not switching supplier in the last 12 months – further detail, 2016

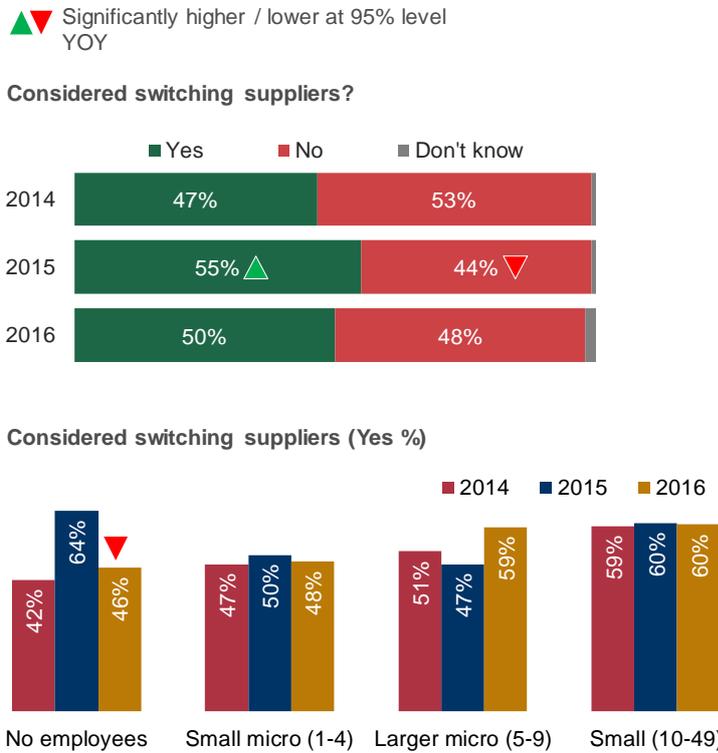
▲▼ Significantly higher / lower at 95% level  
2016 vs. 2015

<b>You were broadly satisfied with the existing supplier</b>	82%	<ul style="list-style-type: none"> <li>▶ Overall, they were more satisfied with their supplier (e.g. NPS is -30% vs. -36% overall)</li> <li>▶ 50% said they <b>re-negotiated</b> their last contract (vs. 39% overall)</li> </ul>
<b>You were tied to your existing contract</b>	53%	<ul style="list-style-type: none"> <li>▶ 99% said they had a fixed term contract</li> <li>▶ Significantly more likely to have said they were on a <b>longer term fix</b> - 42% were on a 2 year fix (vs. 33 overall), 28% were on a 3 year fix (20% overall)</li> </ul>
<b>You did not believe switching would result in significant savings</b>	47%	<ul style="list-style-type: none"> <li>▶ <b>Wanted to save £194 on their bill on average – this is lower</b>, though not significantly so, than the overall average suggesting a genuine belief that savings may not be worth the effort, opportunity cost is too great</li> </ul>
<b>It was too complex and time consuming to find a new tariff or supplier</b>	27%	<ul style="list-style-type: none"> <li>▶ Thought they would need to spend <b>7.2 hours on average looking</b> for another deal – this is <b>in line with average</b> (7.1) hours which again suggests expectations are not unrealistic</li> <li>▶ Significantly more likely to have been the case among <b>small micros</b> (35% vs. 18%-27% among other business sizes)</li> </ul>

QE6. Which of the following reasons, if any, contributed to why you haven't switched in the last 12 months?

Base: Have switched supplier in the last 5 years but not in the last 12 months or don't know, and have not attempted to switch supplier in the last 12 months – 2016 (468).

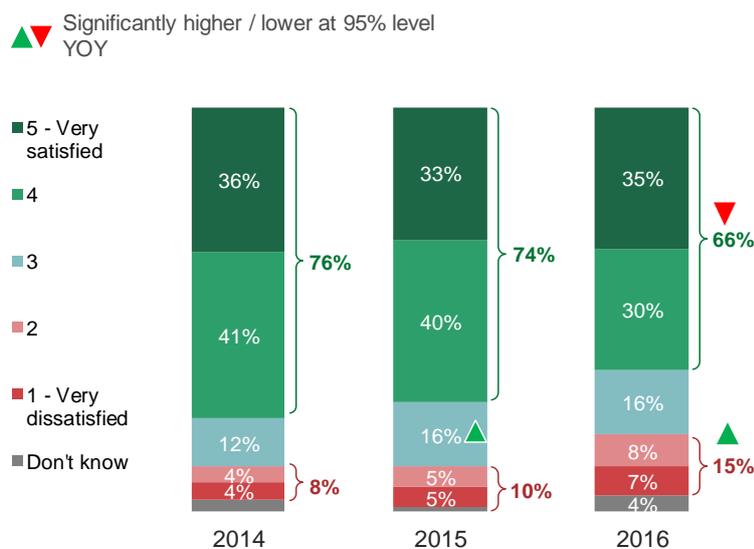
Figure A.8: Switching consideration among those who haven't switched in the last 5 years, 2014-2016



QE3. Have you ever considered switching supplier?

**Bases:** Have not switched in last five years – All: 2014 (509), 2015 (521), 2016 (469); No employees: 2014 (107), 2015 (98), 2016 (113); Small micro (1-4): 2014 (171), 2015 (172), 2016 (158); Larger micro (5-9): 2014 (111), 2015 (110), 2016 (93); Small (10-49): 2014 (120), 2015 (141), 2016 (105).

Figure A.9: Satisfaction with contract rollover, 2014-2016



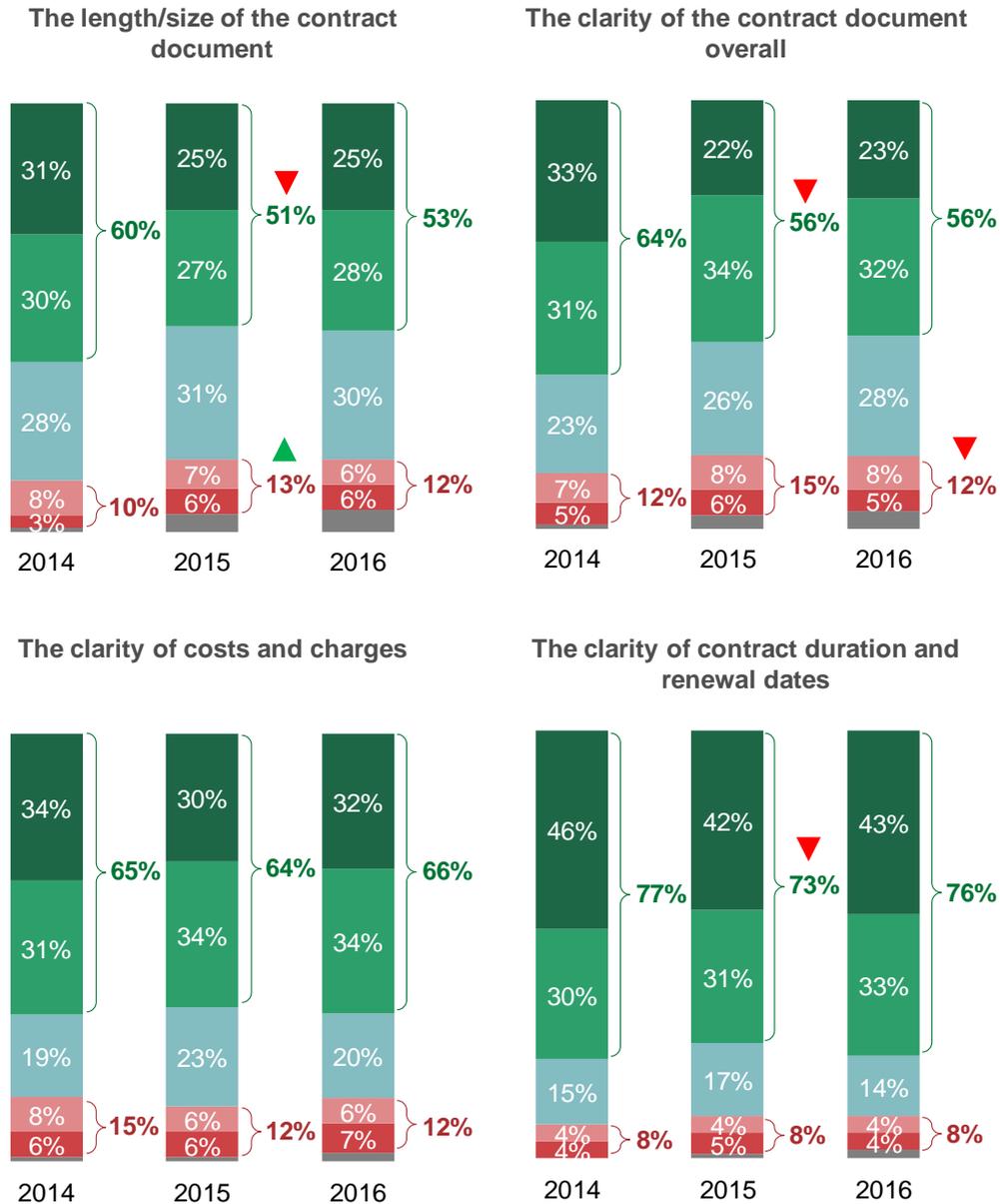
QC11. How satisfied were you with the experience of re-negotiating, extending or rolling over the contract with your energy supplier?

**Bases:** Re-negotiated, extended, or rolled over contracts – 2016 (799), 2015 (810), 2014 (850).

Figure A.10: Satisfaction with aspects of the contract document, 2014-2016

▲ ▼ Significantly higher / lower at 95% level  
YOY

■ 5 - Very satisfied ■ 4 ■ 3 ■ 2 ■ 1 - Very dissatisfied ■ Don't know



QC7. Thinking about your current contract document, how satisfied or dissatisfied are you with the following aspects of it?

Bases: Read, glanced at, or skimmed contract – 2014 (733), 2015 (1170), 2016 (907).

Figure A.11: Satisfaction with existing supplier, 2014-2016

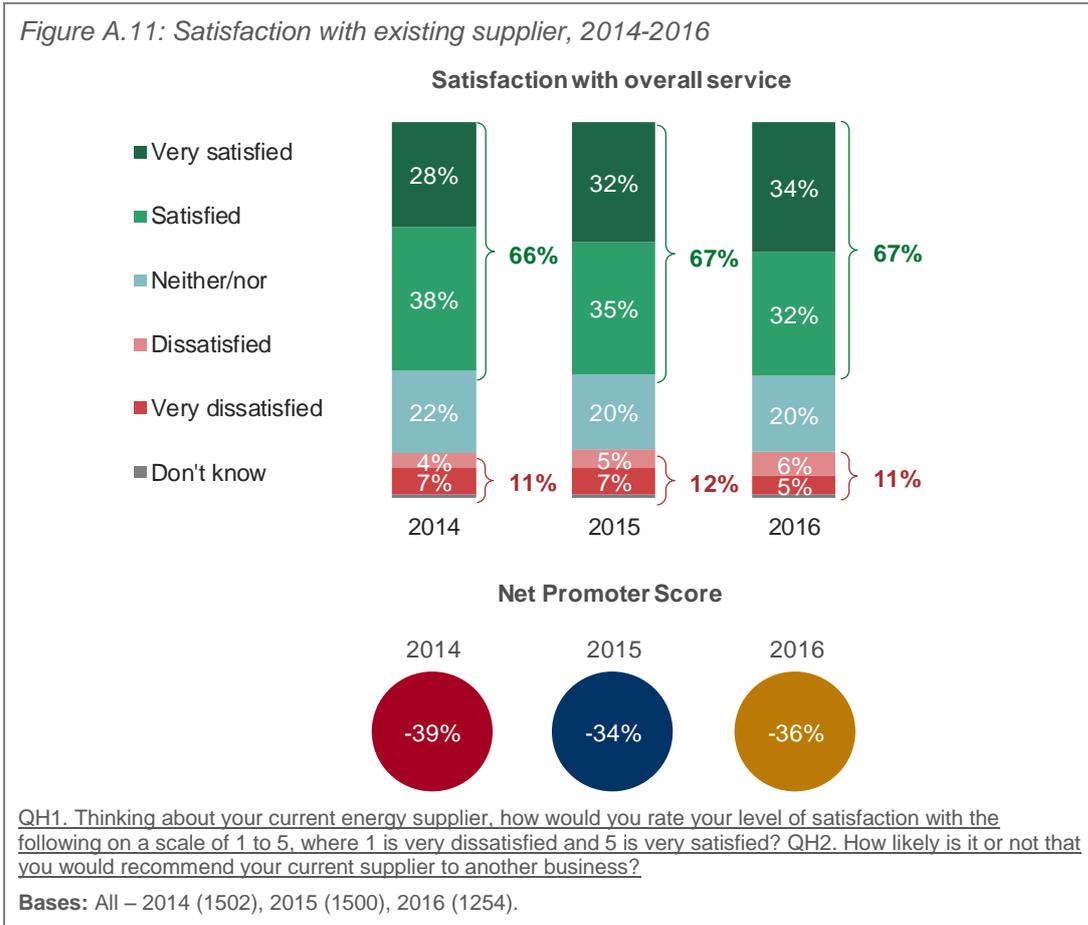


Figure A.12: Satisfaction with aspects of service from existing supplier, 2014-2016

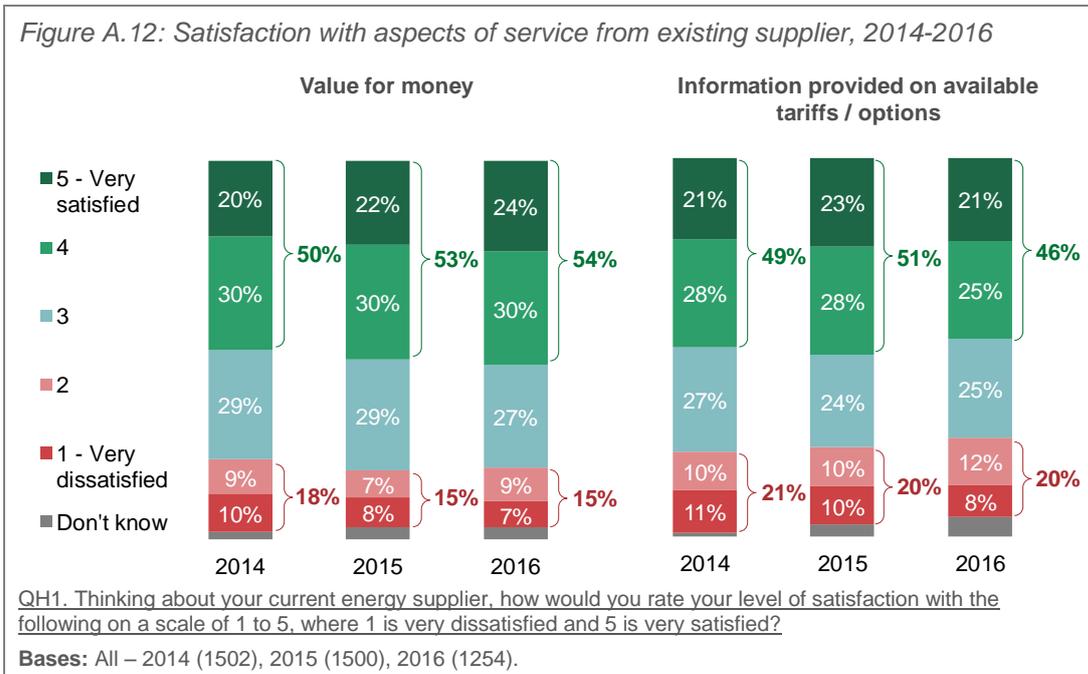
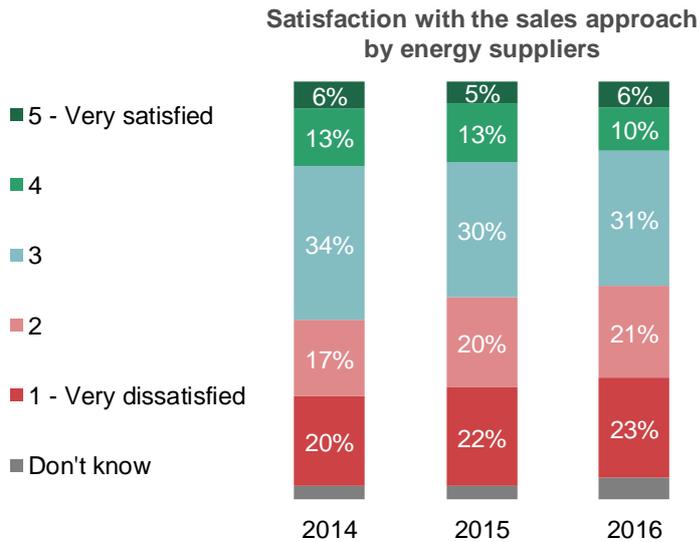
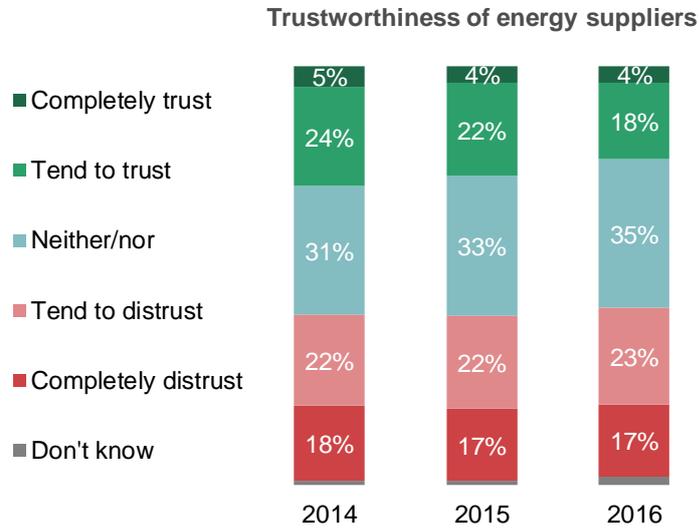


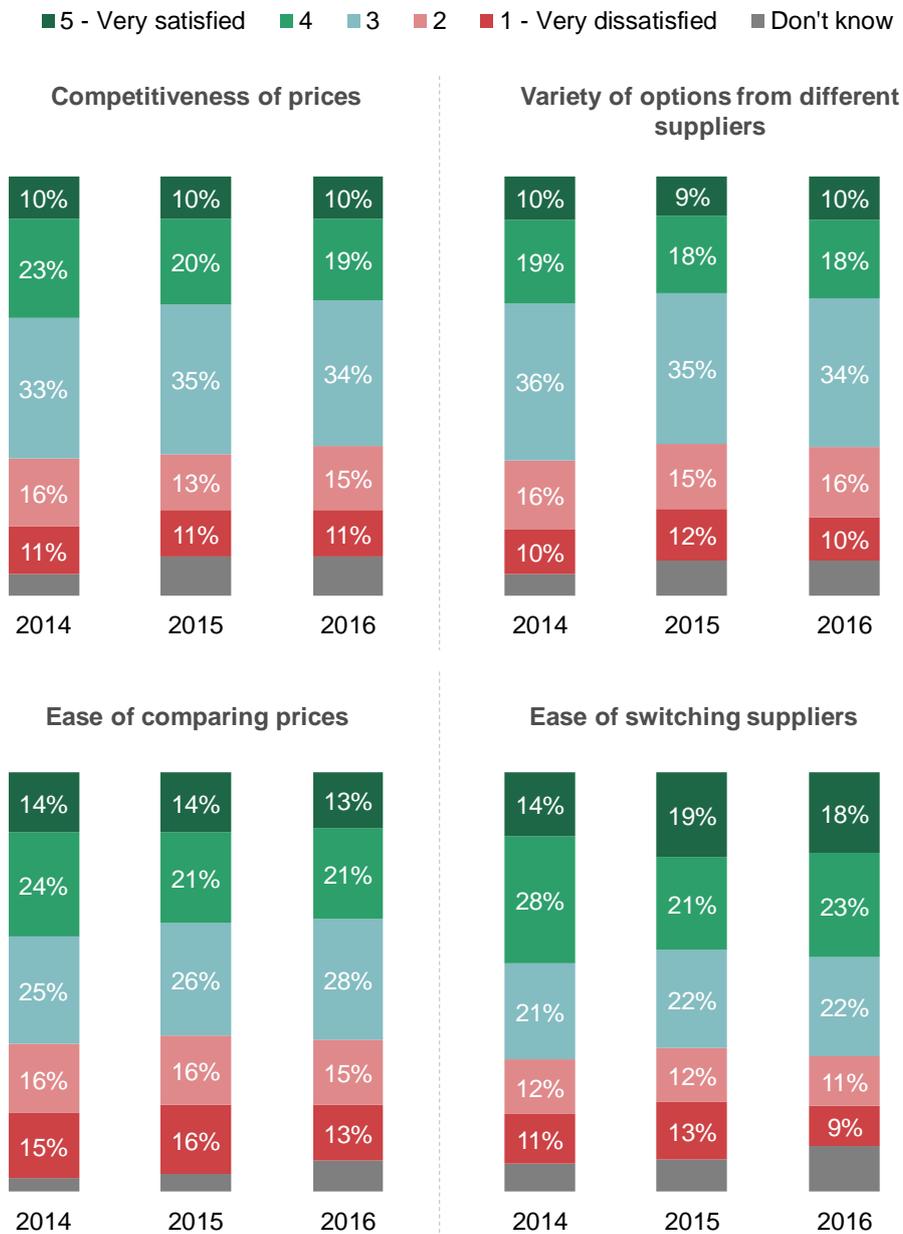
Figure A.13: Perceptions of the energy suppliers, 2014-2016



QH3. Thinking now about the energy market in general, how would you rate your level of satisfaction with the following on a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied? QH4. To what extent do you trust or distrust energy suppliers to be fair in the way they deal with business customers?

**Bases:** All – 2014 (1502), 2015 (1500), 2016 (1254).

Figure A.14: Satisfaction with aspects of the energy market, 2014-2016



QH3. Thinking now about the energy market in general, how would you rate your level of satisfaction with the following on a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied?

Bases: All – 2014 (1502), 2015 (1500), 2016 (1254).

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