CONSUMER ENGAGEMENT IN THE ENERGY MARKET 2017

Technical report on a survey of energy consumers

Research conducted on behalf of:

ofgem

Prepared by: GfK UK Social Research

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1 Survey methodology

1.1 2017 Consumer Engagement Survey

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

1.2 Sample universe and survey eligibility

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

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

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

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

1.3 Stratification and sample point selection

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

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

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

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

3 https://www.ons.gov.uk/methodology/geography/ukgeographies/administrativegeography/england#regions-former-gors
3. One Census Output Area (OA) was selected at random from each constituency (each OA includes an average of 120-150 residential addresses);
4. A paired OA was selected, from within the original sampled constituency (so the addresses are close geographically), to produce an interviewer assignment of around 250-300 addresses;
5. Full address listings were produced, and assigned to interviewers.

1.4 Interviewing

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

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

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

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

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

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

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

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

2.1 Main questionnaire changes between 2016 and 2017

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

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

2.1.1 Segmentation: development of input questions

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

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

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

2.1.2 Introduction of questions on smart meters

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

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

- (a) smart meters allow you to see in pounds and pence the amount of energy you are using in real time, and
• (b) a smart meter in your home means you will receive accurate bills rather than estimated ones from your energy supplier

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

2.1.3 Measuring key engagement indicators

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

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

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

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

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

2.1.4 Setting a priority for follow up questions

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

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

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

6 The rationale behind this decision was to enable the inclusion of people whose last switch was to a 12 month fixed term deal. Those who had switched onto a fixed term deal 4 years ago are likely to have rolled onto a SVT at the end of that deal (likely 3 years ago) and if they had not switched again would be likely to be in the CMA database group.
both, but not whether respondents were talking about switching, changing tariff or comparing tariffs. Another disadvantage of this approach was that not specifying an activity can lead to respondents giving vague responses and limit analysis.

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

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

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

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

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

2.1.5 Additional questions on Price Comparison Websites (PCWs)

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

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

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

2.2 Piloting the questionnaire

Questionnaire piloting consisted of two strands:

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

The cognitive interviews were carried out using telephone and online webinar. Participants were telephoned, and were also logged on to a secure webinar site which enabled the researcher to simultaneously share their computer screen with them to replicate what respondents would see on a CAPI machine in a face-to-face interview. The researcher worked through the full interview with the participant, with additional time taken during the interview to seek clarification, check comprehension
of key questions, and better understand reasoning behind responses given. There was a particular focus on new or altered questions, and identifying areas of difficulty or ambiguity.

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

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

In the interviewer-led pilot, interviewers were asked to obtain a spread of age, gender and working status: they did not work to hard (compulsory) quotas, so as to maximise the number of interviews that could be conducted in a short period of time, and also to gain a spread of responses. Interviewers were briefed by telephone before starting work, including briefing on a feedback document they were asked to complete as part of the piloting process. A telephone debrief with the interviewers collated feedback from the interviewers and their respondents, and fed into questionnaire amendments.

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

#### 3.1 Weighting

Rim weighting is an iterative process of correcting for biases in sub-groups of combined characteristics, such as age, gender and social grade to match to known population targets.

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

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

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

**Table 3.1 Weighted and unweighted profiles**

<table>
<thead>
<tr>
<th>SOCIAL GRADE WITHIN GENDER</th>
<th>Weighted Male</th>
<th>Female</th>
<th>Unweighted Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABC1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16-24</td>
<td>1.0%</td>
<td>1.6%</td>
<td>0.9%</td>
<td>0.7%</td>
</tr>
<tr>
<td>25-34</td>
<td>4.1%</td>
<td>3.4%</td>
<td>3.5%</td>
<td>3.7%</td>
</tr>
<tr>
<td>35-54</td>
<td>11.0%</td>
<td>10.5%</td>
<td>8.6%</td>
<td>9.4%</td>
</tr>
<tr>
<td>55+</td>
<td>11.9%</td>
<td>12.1%</td>
<td>10.1%</td>
<td>8.5%</td>
</tr>
<tr>
<td>C2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16-24</td>
<td>0.4%</td>
<td>0.6%</td>
<td>0.4%</td>
<td>0.4%</td>
</tr>
<tr>
<td>25-34</td>
<td>1.8%</td>
<td>1.4%</td>
<td>2.1%</td>
<td>1.6%</td>
</tr>
<tr>
<td>35-54</td>
<td>4.4%</td>
<td>3.4%</td>
<td>3.9%</td>
<td>4.0%</td>
</tr>
<tr>
<td>55+</td>
<td>4.4%</td>
<td>3.7%</td>
<td>4.7%</td>
<td>2.8%</td>
</tr>
<tr>
<td>DE</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16-24</td>
<td>0.6%</td>
<td>1.0%</td>
<td>0.6%</td>
<td>1.1%</td>
</tr>
<tr>
<td>25-34</td>
<td>1.3%</td>
<td>2.0%</td>
<td>1.8%</td>
<td>3.1%</td>
</tr>
<tr>
<td>35-54</td>
<td>3.5%</td>
<td>3.7%</td>
<td>4.6%</td>
<td>5.5%</td>
</tr>
<tr>
<td>55+</td>
<td>4.5%</td>
<td>6.8%</td>
<td>7.9%</td>
<td>9.0%</td>
</tr>
<tr>
<td>WORKING STATUS WITHIN GENDER</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Full time</td>
<td>27.9%</td>
<td>16.4%</td>
<td>25.8%</td>
<td>17.0%</td>
</tr>
<tr>
<td>Part time</td>
<td>2.6%</td>
<td>10.0%</td>
<td>2.1%</td>
<td>8.4%</td>
</tr>
<tr>
<td>Not working</td>
<td>19.3%</td>
<td>24.0%</td>
<td>15.8%</td>
<td>14.6%</td>
</tr>
<tr>
<td>GOR</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NORTH EAST</td>
<td>4.2%</td>
<td></td>
<td>4.5%</td>
<td></td>
</tr>
<tr>
<td>NORTH WEST</td>
<td>11.6%</td>
<td></td>
<td>12.0%</td>
<td></td>
</tr>
<tr>
<td>YORKSHIRE AND THE HUMBER</td>
<td>6.4%</td>
<td></td>
<td>8.6%</td>
<td></td>
</tr>
<tr>
<td>SCOTLAND</td>
<td>9.3%</td>
<td></td>
<td>8.9%</td>
<td></td>
</tr>
<tr>
<td>EAST MIDLANDS</td>
<td>8.2%</td>
<td></td>
<td>7.3%</td>
<td></td>
</tr>
<tr>
<td>WEST MIDLANDS</td>
<td>9.2%</td>
<td></td>
<td>9.3%</td>
<td></td>
</tr>
<tr>
<td>EAST</td>
<td>8.8%</td>
<td></td>
<td>9.1%</td>
<td></td>
</tr>
<tr>
<td>WALES</td>
<td>5.9%</td>
<td></td>
<td>4.8%</td>
<td></td>
</tr>
<tr>
<td>LONDON</td>
<td>11.3%</td>
<td></td>
<td>12.8%</td>
<td></td>
</tr>
<tr>
<td>SOUTH EAST</td>
<td>15.0%</td>
<td></td>
<td>13.8%</td>
<td></td>
</tr>
<tr>
<td>SOUTH WEST</td>
<td>9.9%</td>
<td></td>
<td>9.0%</td>
<td></td>
</tr>
</tbody>
</table>
A small number of respondents gave answers which meant we were unable to include them in the weighting. In these cases, they were given a weight of 1 for that dimension (i.e. the weighting had no impact for them).

These were as follows:

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

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

3.2 Statistical significance

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

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

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

3.3 Key definitions

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

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

3.4 Calculating overall results

The survey contains different versions of certain questions in order to capture differences between gas consumers, electricity consumers, those who use both, and those on a dual fuel tariff. Some variables in the tables and SPSS are therefore based on two measures, one asked of gas consumers (either
gas only or gas and electricity consumers) and one asked of electricity consumers (electricity only, or gas and electricity consumers). For these variables, results were calculated by averaging data across the two questions, to provide a single overall figure.

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

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

**Example of average result based on proportion of consumers – switching supplier in the last 12 months (variable Q138_Q139 in the tables):**

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

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

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

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

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

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

<table>
<thead>
<tr>
<th>Metric</th>
<th>Question Numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any Big-Six supplier</td>
<td>Q3-Q151 / Q4_Q151</td>
</tr>
<tr>
<td>Payment type for gas and/or electric</td>
<td>Q5 / Q6</td>
</tr>
<tr>
<td>Switched supplier in the last 12 months</td>
<td>Q138 / Q139</td>
</tr>
<tr>
<td>Ever switched</td>
<td>Q21 / Q22</td>
</tr>
<tr>
<td>Changed tariff with existing supplier in the last 12 months</td>
<td>Q35 / Q36</td>
</tr>
<tr>
<td>Ever changed tariff with existing supplier</td>
<td>TmesG / TmesE</td>
</tr>
<tr>
<td>Compared tariffs with other supplier (but not switched supplier or changed tariff) in the last 12 months</td>
<td>ChngG / ChngE</td>
</tr>
<tr>
<td>Compared tariffs with own supplier (but not switched supplier or changed tariff) in the last 12 months</td>
<td>ChngG / ChngE</td>
</tr>
<tr>
<td>Active Consumers - Active in the energy market in the last 12 months either by comparing tariffs, changing their tariff with their existing energy supplier or switching supplier</td>
<td>Q138 / Q139 / TmesG / /TmesE / ChngG / ChngE</td>
</tr>
<tr>
<td>Changed payment method in the last 12 months</td>
<td>ChngG / ChngE</td>
</tr>
</tbody>
</table>

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

For the question of how consumers rate their supplier for value for money, there were three questions:
- RateS_G: ‘How do you rate your current gas supplier in terms of value for money?’
- RateS_E: ‘How do you rate your current electricity supplier in terms of value for money?’
- RateS_D: ‘How do you rate your current energy supplier in terms of value for money?’

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

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

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

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

3.5 Segmentation

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

A factor analysis was run on data from 2244 respondents, part-way through fieldwork, in order to reduce the number of variables to be fed into the segmentation, and help in interpretation. The factor analysis grouped together those variables which were intercorrelated, as measured by the coefficient of correlation. Several factor analysis solutions were run, on 31 different variables, producing a different number of factors. GfK and Ofgem agreed on an 8-factor solution which they agreed (i) included factors which were semantically intuitive and interpretable, and (ii) could explain a high proportion of the total variation within the data. Table 3.1 contains the full list of factors and inputs. The new factors are average measurements: each factor is an average of the original variables that make up that factor. From this, factor scores are calculated for respondents for each of the newly derived factors. The factors were subsequently verified using the full data set, prior to their inclusion in the segmentation analysis.
<table>
<thead>
<tr>
<th>Factor 1: Market Confidence</th>
<th>Input variables</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Factor 1:</strong> Market Confidence</td>
<td>Conf2_2. Choosing the best energy deal for your household</td>
</tr>
<tr>
<td></td>
<td>Conf2_1. Comparing the different energy deals available</td>
</tr>
<tr>
<td></td>
<td>Conf2_4. Understanding your energy bill</td>
</tr>
<tr>
<td></td>
<td>Conf2_3. Making a complaint to your energy supplier, if you had a reason to complain</td>
</tr>
<tr>
<td></td>
<td>q145 How easy or difficult do you believe it is to compare different tariffs for electricity or gas?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Factor 2: Trust in suppliers</th>
<th>Input variables</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Factor 2:</strong> Trust in suppliers</td>
<td>Q60/64/68 Treat you fairly in their dealings with you</td>
</tr>
<tr>
<td></td>
<td>Q60/64/68 Charge you a fair price for your gas</td>
</tr>
<tr>
<td></td>
<td>Q60/64/68 Provide clear and helpful information for you</td>
</tr>
<tr>
<td></td>
<td>Q123/Q124/Q125 How confident are you that you currently have the best deal</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Factor 3: Switching attitudes</th>
<th>Input variables</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Factor 3:</strong> Switching attitudes</td>
<td>q121_1 Switching is a hassle that I’ve not got time for</td>
</tr>
<tr>
<td></td>
<td>q121_3 Switching energy suppliers takes too long</td>
</tr>
<tr>
<td></td>
<td>q121_2 I worry that if I switch things will go wrong</td>
</tr>
<tr>
<td></td>
<td>q121_5 It’s too hard to work out whether I would save or not if I switched</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Factor 4: Engaged shoppers</th>
<th>Input variables</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Factor 4:</strong> Engaged shoppers</td>
<td>Empow4. I usually continue to search for an item until it reaches my expectations</td>
</tr>
<tr>
<td></td>
<td>Empow1. As soon as I see a problem or challenge I start looking for possible solutions</td>
</tr>
<tr>
<td></td>
<td>Empow5. When shopping for a major purchase, I don't mind spending several hours looking for it</td>
</tr>
<tr>
<td></td>
<td>Empow2. I am able to follow through with things once I've made up my mind to do something</td>
</tr>
<tr>
<td></td>
<td>Empow10. I always like to look for ways that I can save money, even if it is only a little</td>
</tr>
<tr>
<td></td>
<td>Empow11. I always check bank or building society statements when I get them, including online</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Factor 5: PCW attitudes</th>
<th>Input variables</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Factor 5:</strong> PCW attitudes</td>
<td>pcwst_2 Price comparison websites are unbiased in the way they display energy deals</td>
</tr>
<tr>
<td></td>
<td>pcwst_3 Price comparison websites make clear how potential savings are calculated</td>
</tr>
<tr>
<td></td>
<td>pcwst_1 Price comparison websites all have the same energy deals on them</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Factor 6: Open to Innovation</th>
<th>Input variables</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Factor 6:</strong> Open to Innovation</td>
<td>Empow7. I am usually among the first to try a new product when it appears on the market</td>
</tr>
<tr>
<td></td>
<td>spatt1 I would be wary of using an energy supplier I have never heard of</td>
</tr>
<tr>
<td></td>
<td>spatt2 If I was going to change energy supplier, I would look for a supplier who offered me extra rewards</td>
</tr>
<tr>
<td></td>
<td>spatt3 I would be very happy to pay slightly more for my energy if my supplier offered me better customer service</td>
</tr>
<tr>
<td></td>
<td>q121_4 As far as I know, most of my family and friends regularly switch their energy supplier</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Factor 7: Added value services</th>
<th>Input variables</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Factor 7:</strong> Added value services</td>
<td>q73 Range of tariffs available</td>
</tr>
<tr>
<td></td>
<td>Empow9. When looking for new products and services, I often find the amount of information overwhelming</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Factor 8: Adequate information</th>
<th>Input variables</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Factor 8:</strong> Adequate information</td>
<td>Empow3. I can’t possibly know everything before making a decision</td>
</tr>
</tbody>
</table>
3.5.2 Segmentation analysis

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

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

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

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

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

3.6 Accompanying data tables and SPSS

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

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

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

3.7 Qualitative methods

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

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

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

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

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

3.7.2 Qualitative sample

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

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

<table>
<thead>
<tr>
<th>Segment</th>
<th>Gender</th>
<th>Age</th>
<th>Engagement action in past 12 months</th>
<th>Social Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Segment 1</td>
<td>Male</td>
<td>58</td>
<td>Done nothing</td>
<td>D</td>
</tr>
<tr>
<td>Market Sceptics</td>
<td>Female</td>
<td>49</td>
<td>Switched tariff</td>
<td>C1</td>
</tr>
<tr>
<td>Segment 2</td>
<td>Female</td>
<td>35</td>
<td>Switched tariff</td>
<td>C1</td>
</tr>
<tr>
<td>Happy Shoppers</td>
<td>Male</td>
<td>39</td>
<td>Compared tariff</td>
<td>B</td>
</tr>
<tr>
<td>Segment 3</td>
<td>Male</td>
<td>71</td>
<td>Switched tariff</td>
<td>C2</td>
</tr>
<tr>
<td>Anxious Avoiders</td>
<td>Female</td>
<td>28</td>
<td>Done nothing</td>
<td>C2</td>
</tr>
<tr>
<td>Segment 4</td>
<td>Female</td>
<td>63</td>
<td>Done nothing</td>
<td>B</td>
</tr>
<tr>
<td>Contented Conformers</td>
<td>Male</td>
<td>56</td>
<td>Compared tariff</td>
<td>E</td>
</tr>
<tr>
<td>Segment 5</td>
<td>Female</td>
<td>42</td>
<td>Done nothing</td>
<td>C1</td>
</tr>
<tr>
<td>Hassle Haters</td>
<td>Male</td>
<td>66</td>
<td>Switched supplier</td>
<td>C2</td>
</tr>
</tbody>
</table>
It is worth noting that there were some difficulties in recruiting the required sample, despite the large numbers of survey contacts available. This resulted in relaxation of the age criteria initially set, to allow inclusion of more people over the age of 55 than had been originally planned. Additional research locations were added during recruitment, to increase the pool of potential contacts. Two possible reasons for these difficulties are suggested. First, the application of quotas on switching behavior reduced the number of potential participants considerably, especially where the required behavior was less typical of the segment. Second, people in the over 55 age group were less likely to be working or have other commitments preventing them from taking part in a depth interview.

### 3.7.3 Qualitative Recruitment

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

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

### 3.7.4 Qualitative analysis and reporting

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

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

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

---

7 Whether the metric is derived from as a simple percentage, or calculated from the proportion of consumers or the proportion of responses (as detailed in section 3.4)
8 Whether respondent has ever switched either gas, or electricity supplier
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Q138/ Q139/ WhnSG/ WhnSE/ ChngG/ ChngE</td>
<td>% consumers</td>
<td>Active Consumers - Active in the energy market in the last 12 months either by comparing tariffs, changing their tariff with their existing energy supplier or switching supplier*</td>
<td>34</td>
<td>37</td>
<td>37</td>
<td>41</td>
</tr>
<tr>
<td>ChngG/ ChngE</td>
<td>% consumers</td>
<td>Changed payment method in the last 12 months*</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>6</td>
</tr>
<tr>
<td>Q94</td>
<td>Simple %</td>
<td>Recall of Annual Summary</td>
<td>55</td>
<td>59</td>
<td>60</td>
<td>59</td>
</tr>
<tr>
<td>Q94</td>
<td>Simple %</td>
<td>Recall of Bill or direct debit/ prepayment statement</td>
<td>69</td>
<td>69</td>
<td>70</td>
<td>71</td>
</tr>
<tr>
<td>Q94</td>
<td>Simple %</td>
<td>Recall of Price increase notification letter</td>
<td>48</td>
<td>29</td>
<td>22</td>
<td>40</td>
</tr>
<tr>
<td>Q94</td>
<td>Simple %</td>
<td>Recall of End of fixed term tariff notice</td>
<td>20</td>
<td>19</td>
<td>21</td>
<td>25</td>
</tr>
</tbody>
</table>

Consumer segments

- Derived Market sceptics
- Derived Happy shoppers
- Derived Anxious avoiders
- Derived Contended conformers
- Derived Hassle haters
- Derived Savvy switchers

Behaviour around switching and comparing

<table>
<thead>
<tr>
<th>Question</th>
<th>Calculation method</th>
<th>Question</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q160</td>
<td>Simple %</td>
<td>Switched supplier, changed tariff or compared tariffs to save money Base: Active Consumers - All those who switched supplier, changed tariff or compared tariffs in the last 12 months (2014: 2000; 2015:2034; 2016:2112; 2017: 1558)</td>
<td>91</td>
<td>91</td>
<td>91</td>
<td>91</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>------</td>
<td>------</td>
<td>------</td>
<td>------</td>
</tr>
</tbody>
</table>
| Q166        | Simple %          | Currently or expects to pay less for energy as a result of switching supplier or changing tariff  
*Base: All those who switched supplier or changed tariff with the aim of saving money*  
*(2014: 1352; 2015:1306; 2016:1424; 2017: 957)*                                                                                           | 77   | 83   | 86   | 83   |
| Q165        | Simple %          | Found out about deals offered when last compared, changed or switched via an online price comparison service  
*Base: Active Consumers - All those who switched supplier, changed tariff or compared tariffs in the last 12 months*  
| Q123 / Q124 / Q125 | % responses | Confident on the best energy deal for them                                                                                                           | 55   | 48   | 50   | 56   |

### Experiences in the energy market

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Q73</td>
<td>Simple %</td>
<td>Feel there is about the right choice of different tariffs available</td>
<td>45</td>
<td>44</td>
<td>48</td>
<td>46</td>
</tr>
<tr>
<td>Q145</td>
<td>Simple %</td>
<td>Feel it is easy to compare tariffs</td>
<td>37</td>
<td>38</td>
<td>43</td>
<td>47</td>
</tr>
<tr>
<td>Q94</td>
<td>Simple %</td>
<td>Recall receiving at least one communication (annual statement, bill or direct debit/ prepayment statement, price increase notification, end of fixed term tariff letter</td>
<td>83</td>
<td>82</td>
<td>82</td>
<td>82</td>
</tr>
<tr>
<td>Q153 / Q89 / Q90</td>
<td>% responses</td>
<td>Familiar with…the features of current tariff</td>
<td>43</td>
<td>41</td>
<td>44</td>
<td>50</td>
</tr>
<tr>
<td>Q59 / Q63 / Q67</td>
<td>% responses</td>
<td>Satisfied with overall service received from current supplier(s)</td>
<td>72</td>
<td>75</td>
<td>77</td>
<td>77</td>
</tr>
<tr>
<td>Q60_1 / Q64_1 / Q68_1</td>
<td>% responses</td>
<td>Trust current supplier(s) to…treat them fairly in their dealings with them</td>
<td>62</td>
<td>64</td>
<td>66</td>
<td>67</td>
</tr>
<tr>
<td>Q60_2 / Q64_2 / Q68_2</td>
<td>% responses</td>
<td>Trust current supplier(s) to…provide clear and helpful information</td>
<td>65</td>
<td>64</td>
<td>66</td>
<td>66</td>
</tr>
</tbody>
</table>

---

9 Consumers who said 'Yes' at any of Q18, Q19, Q35, Q36, Q20 AND 'Save money' at Q160
<table>
<thead>
<tr>
<th>Question No.</th>
<th>Calculation method(^a)</th>
<th>Question</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q60_3 / Q64_3 / Q68_3</td>
<td>% responses</td>
<td>Trust current supplier(s) to…charge a fair price</td>
<td>51</td>
<td>55</td>
<td>58</td>
<td>58</td>
</tr>
<tr>
<td>Q76</td>
<td>Simple %</td>
<td>Made a complaint</td>
<td>10</td>
<td>9</td>
<td>9</td>
<td>10</td>
</tr>
<tr>
<td>Q81</td>
<td>Simple %</td>
<td>Had reason to complain but didn’t</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td><em>Base: All those who hadn’t complained in the last 12 months to current/previous supplier (2014: 5568; 2015: 5399; 2016:5446)</em></td>
<td>3</td>
<td>4</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Empow</td>
<td>Simple %</td>
<td>Agree that ‘I always check bank or building society statements when I get them’</td>
<td>80</td>
<td>81</td>
<td>82</td>
<td>83</td>
</tr>
<tr>
<td>Q1</td>
<td>Simple %</td>
<td>Gas supply only</td>
<td>&lt;1</td>
<td>&lt;1</td>
<td>&lt;1</td>
<td>&lt;1</td>
</tr>
<tr>
<td>Q10</td>
<td>Simple %</td>
<td>On an online tariff</td>
<td>34</td>
<td>39</td>
<td>47</td>
<td>50</td>
</tr>
<tr>
<td>Q11</td>
<td>Simple %</td>
<td>On a fixed term tariff</td>
<td>42</td>
<td>38</td>
<td>40</td>
<td>50</td>
</tr>
<tr>
<td>Q5 / Q6</td>
<td>% consumers</td>
<td>Pays for gas and/or electricity by direct debit*</td>
<td>65</td>
<td>71</td>
<td>73</td>
<td>73</td>
</tr>
<tr>
<td>Q5 / Q6</td>
<td>% consumers</td>
<td>Pays for gas and/or electricity by prepayment meter*</td>
<td>15</td>
<td>18</td>
<td>16</td>
<td>17</td>
</tr>
<tr>
<td>Q13</td>
<td>Simple %</td>
<td>Has an electricity (time of use) meter</td>
<td>12</td>
<td>11</td>
<td>12</td>
<td>25</td>
</tr>
</tbody>
</table>

**Energy supply and payment/account characteristics**

- Gas supply only
- Electricity supply only
- Gas and electricity supply
- On an online tariff
- On a fixed term tariff
- On a standard variable tariff or mixed arrangement
- Pays for gas and/or electricity by direct debit*
- Pays for gas and/or electricity by prepayment meter*
- Has an electricity (time of use) meter

*Base: All those who have an electricity supply (2014:6130; 2015:5923; 2016:5939)
### Table 4.2 Key segment characteristics

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

<sup>10</sup> Please note that in 2014 the comparison questions were asked of those who had not switched supplier or changed tariff in the last 12 months only, whereas in 2015 all consumers were asked these questions.
<table>
<thead>
<tr>
<th>Segment</th>
<th>Market Sceptics</th>
<th>Happy Shoppers</th>
<th>Anxious Avoiders</th>
<th>Contented Conformers</th>
<th>Hassle Haters</th>
<th>Savvy Searchers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recall of End of fixed term tariff notice</td>
<td>18</td>
<td>33</td>
<td>19</td>
<td>18</td>
<td>27</td>
<td>34</td>
</tr>
<tr>
<td>Made a complaint</td>
<td>21</td>
<td>8</td>
<td>7</td>
<td>7</td>
<td>7</td>
<td>16</td>
</tr>
<tr>
<td>% of consumers in England</td>
<td>81</td>
<td>89</td>
<td>87</td>
<td>82</td>
<td>84</td>
<td>85</td>
</tr>
<tr>
<td>% of consumers in Wales</td>
<td>5</td>
<td>6</td>
<td>4</td>
<td>7</td>
<td>5</td>
<td>7</td>
</tr>
<tr>
<td>% of consumers in Scotland</td>
<td>14</td>
<td>5</td>
<td>9</td>
<td>10</td>
<td>11</td>
<td>8</td>
</tr>
<tr>
<td>Aged 16-34</td>
<td>21</td>
<td>21</td>
<td>21</td>
<td>13</td>
<td>26</td>
<td>15</td>
</tr>
<tr>
<td>Aged 35-64</td>
<td>58</td>
<td>55</td>
<td>45</td>
<td>43</td>
<td>51</td>
<td>63</td>
</tr>
<tr>
<td>Aged 65+</td>
<td>21</td>
<td>23</td>
<td>33</td>
<td>44</td>
<td>23</td>
<td>22</td>
</tr>
<tr>
<td>Social Grade AB</td>
<td>25</td>
<td>25</td>
<td>17</td>
<td>18</td>
<td>19</td>
<td>35</td>
</tr>
<tr>
<td>Social Grade C1</td>
<td>34</td>
<td>37</td>
<td>28</td>
<td>32</td>
<td>31</td>
<td>35</td>
</tr>
<tr>
<td>Social Grade C2</td>
<td>21</td>
<td>19</td>
<td>23</td>
<td>20</td>
<td>23</td>
<td>17</td>
</tr>
<tr>
<td>Social Grade DE</td>
<td>21</td>
<td>18</td>
<td>32</td>
<td>30</td>
<td>27</td>
<td>13</td>
</tr>
<tr>
<td>Owner Occupier</td>
<td>61</td>
<td>63</td>
<td>55</td>
<td>59</td>
<td>54</td>
<td>73</td>
</tr>
<tr>
<td>Social Renter</td>
<td>19</td>
<td>19</td>
<td>27</td>
<td>25</td>
<td>22</td>
<td>11</td>
</tr>
<tr>
<td>Private Renter</td>
<td>19</td>
<td>16</td>
<td>17</td>
<td>14</td>
<td>22</td>
<td>14</td>
</tr>
<tr>
<td>English is not first/main language</td>
<td>6</td>
<td>6</td>
<td>11</td>
<td>7</td>
<td>11</td>
<td>3</td>
</tr>
<tr>
<td>Agree that ‘I always like to look for ways that I can save money, even if it is only a</td>
<td>82</td>
<td>90</td>
<td>42</td>
<td>79</td>
<td>89</td>
<td>85</td>
</tr>
<tr>
<td></td>
<td>Market Sceptics</td>
<td>Happy Shoppers</td>
<td>Anxious Avoiders</td>
<td>Contented Conformers</td>
<td>Hassle Haters</td>
<td>Savvy Searchers</td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>-----------------</td>
<td>----------------</td>
<td>------------------</td>
<td>----------------------</td>
<td>---------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>Agree that 'I always check bank or building society statements when I get them'</td>
<td>86</td>
<td>92</td>
<td>45</td>
<td>92</td>
<td>85</td>
<td>86</td>
</tr>
<tr>
<td>Regular internet user (at least once a day)</td>
<td>83</td>
<td>86</td>
<td>59</td>
<td>62</td>
<td>74</td>
<td>91</td>
</tr>
<tr>
<td>On a fixed term tariff</td>
<td>38</td>
<td>64</td>
<td>42</td>
<td>40</td>
<td>52</td>
<td>62</td>
</tr>
<tr>
<td>Pays for gas and/or electricity by direct debit</td>
<td>69</td>
<td>78</td>
<td>68</td>
<td>69</td>
<td>72</td>
<td>87</td>
</tr>
<tr>
<td>Pays for gas and/or electricity by prepayment meter</td>
<td>20</td>
<td>16</td>
<td>18</td>
<td>17</td>
<td>19</td>
<td>10</td>
</tr>
<tr>
<td>Has an electricity (time of use) meter</td>
<td>20</td>
<td>23</td>
<td>33</td>
<td>20</td>
<td>31</td>
<td>21</td>
</tr>
<tr>
<td>Big Six Supplier for gas and/or electricity</td>
<td>80</td>
<td>66</td>
<td>82</td>
<td>84</td>
<td>80</td>
<td>64</td>
</tr>
</tbody>
</table>
In the tables that follow, significant differences are marked as follows:

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

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

<table>
<thead>
<tr>
<th>Group</th>
<th>2017 Base</th>
<th>2016 Base</th>
<th>2015 Base</th>
</tr>
</thead>
<tbody>
<tr>
<td>All consumers</td>
<td>4001</td>
<td>5956</td>
<td>5934</td>
</tr>
<tr>
<td>Age 16-34</td>
<td>807</td>
<td>1147</td>
<td>1098</td>
</tr>
<tr>
<td>35-64</td>
<td>2049</td>
<td>2679</td>
<td>2734</td>
</tr>
<tr>
<td>65+</td>
<td>1126</td>
<td>2130</td>
<td>2102</td>
</tr>
<tr>
<td>Social Grade AB</td>
<td>752</td>
<td>1171</td>
<td>1071</td>
</tr>
<tr>
<td>C1</td>
<td>1083</td>
<td>1551</td>
<td>1469</td>
</tr>
<tr>
<td>C2</td>
<td>806</td>
<td>1139</td>
<td>1066</td>
</tr>
<tr>
<td>DE</td>
<td>1360</td>
<td>2095</td>
<td>2328</td>
</tr>
<tr>
<td>Income Under £16K pa</td>
<td>859</td>
<td>2093</td>
<td>2406</td>
</tr>
<tr>
<td>£16K+ pa</td>
<td>1805</td>
<td>2995</td>
<td>2735</td>
</tr>
<tr>
<td>Internet use Frequent user</td>
<td>2923</td>
<td>4023</td>
<td>4257</td>
</tr>
<tr>
<td>Infrequent/non-user</td>
<td>1043</td>
<td>1856</td>
<td>1677</td>
</tr>
<tr>
<td>How pay Direct debit</td>
<td>2799</td>
<td>4238</td>
<td>4216</td>
</tr>
<tr>
<td>Standard credit</td>
<td>339</td>
<td>515</td>
<td>603</td>
</tr>
<tr>
<td>Prepayment meter</td>
<td>779</td>
<td>981</td>
<td>1054</td>
</tr>
<tr>
<td>Supplier Any of the 6 large suppliers</td>
<td>3082</td>
<td>4716</td>
<td>4986</td>
</tr>
<tr>
<td>With a medium/smaller supplier</td>
<td>919</td>
<td>1240</td>
<td>948</td>
</tr>
<tr>
<td>Country England</td>
<td>3453</td>
<td>5057</td>
<td>5069</td>
</tr>
</tbody>
</table>
### Table 4.3 Tariff changing levels – comparison within sub-groups over time

<table>
<thead>
<tr>
<th>Group</th>
<th>2017 Base</th>
<th>2017 %</th>
<th>2016 Base</th>
<th>2016 %</th>
<th>2015 Base</th>
<th>2015 %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scotland</td>
<td>357</td>
<td>13▼</td>
<td>524</td>
<td>12</td>
<td>551</td>
<td>10</td>
</tr>
<tr>
<td>Wales</td>
<td>191</td>
<td>24▲</td>
<td>375</td>
<td>12</td>
<td>314</td>
<td>11</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Group</th>
<th>2017 Base</th>
<th>2017 %</th>
<th>2016 Base</th>
<th>2016 %</th>
<th>2015 Base</th>
<th>2015 %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age 16-34</td>
<td>807</td>
<td>13▼</td>
<td>1147</td>
<td>12▼</td>
<td>1138</td>
<td>14▼</td>
</tr>
<tr>
<td>Age 35-64</td>
<td>2049</td>
<td>17▲</td>
<td>2679</td>
<td>19▲</td>
<td>3108</td>
<td>18▲</td>
</tr>
<tr>
<td>Age 65+</td>
<td>1126</td>
<td>15</td>
<td>2130</td>
<td>17▲</td>
<td>1688</td>
<td>17▲</td>
</tr>
<tr>
<td>Social Grade AB</td>
<td>752</td>
<td>21▲</td>
<td>1171</td>
<td>23▲</td>
<td>1339</td>
<td>27▲</td>
</tr>
<tr>
<td>Social Grade C1</td>
<td>1083</td>
<td>18▲</td>
<td>1551</td>
<td>18▲</td>
<td>1889</td>
<td>18▲</td>
</tr>
<tr>
<td>Social Grade C2</td>
<td>806</td>
<td>12▼</td>
<td>1139</td>
<td>15▲</td>
<td>1236</td>
<td>15▲</td>
</tr>
<tr>
<td>Income Under £16K pa</td>
<td>859</td>
<td>14▲</td>
<td>2093</td>
<td>11</td>
<td>1896</td>
<td>10</td>
</tr>
<tr>
<td>Income £16K+ pa</td>
<td>1805</td>
<td>18▲</td>
<td>2995</td>
<td>20</td>
<td>3278</td>
<td>22▲</td>
</tr>
<tr>
<td>Internet use Frequent user</td>
<td>2923</td>
<td>18▲</td>
<td>4023</td>
<td>19▲</td>
<td>4642</td>
<td>20▲</td>
</tr>
<tr>
<td>Internet use Infrequent/non-user</td>
<td>1043</td>
<td>10</td>
<td>686</td>
<td>12▲</td>
<td>1292</td>
<td>8</td>
</tr>
<tr>
<td>How pay Direct debit</td>
<td>2799</td>
<td>18▲</td>
<td>4135</td>
<td>21▲</td>
<td>4216</td>
<td>22▲</td>
</tr>
<tr>
<td>Standard credit</td>
<td>339</td>
<td>7▼</td>
<td>606</td>
<td>9▲</td>
<td>603</td>
<td>9▲</td>
</tr>
<tr>
<td>Prepayment meter</td>
<td>779</td>
<td>9▼</td>
<td>1087</td>
<td>5▼</td>
<td>1054</td>
<td>6▼</td>
</tr>
<tr>
<td>Supplier Any of the 6 large suppliers</td>
<td>3082</td>
<td>14</td>
<td>4716</td>
<td>16</td>
<td>4986</td>
<td>17</td>
</tr>
<tr>
<td>With a</td>
<td>919</td>
<td>21▲</td>
<td>1240</td>
<td>18</td>
<td>948</td>
<td>19</td>
</tr>
</tbody>
</table>
### Table 4.4 Other supplier comparison levels – comparison within sub-groups over time

<table>
<thead>
<tr>
<th>Group</th>
<th>2017 Base</th>
<th>2016 Base</th>
<th>2015 Base</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>%</td>
<td>%</td>
<td>%</td>
</tr>
<tr>
<td>medium/smaller supplier</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Country</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>England</td>
<td>3453</td>
<td>5057</td>
<td>5069</td>
</tr>
<tr>
<td>Scotland</td>
<td>357</td>
<td>524</td>
<td>551</td>
</tr>
<tr>
<td>Wales</td>
<td>191</td>
<td>375</td>
<td>314</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Group</th>
<th>2017 Base</th>
<th>2016 Base</th>
<th>2015 Base</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>%</td>
<td>%</td>
<td>%</td>
</tr>
<tr>
<td>All consumers</td>
<td>4001</td>
<td>5956</td>
<td>5934</td>
</tr>
<tr>
<td>Age</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16-34</td>
<td>807</td>
<td>1147</td>
<td>1138</td>
</tr>
<tr>
<td>35-64</td>
<td>2049</td>
<td>2679</td>
<td>3108</td>
</tr>
<tr>
<td>65+</td>
<td>1126</td>
<td>2130</td>
<td>1688</td>
</tr>
<tr>
<td>Social Grade</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AB</td>
<td>752</td>
<td>1171</td>
<td>1339</td>
</tr>
<tr>
<td>C1</td>
<td>1083</td>
<td>1551</td>
<td>1889</td>
</tr>
<tr>
<td>C2</td>
<td>806</td>
<td>1139</td>
<td>1236</td>
</tr>
<tr>
<td>DE</td>
<td>1360</td>
<td>2095</td>
<td>1470</td>
</tr>
<tr>
<td>Income</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Under £16K pa</td>
<td>859</td>
<td>2093</td>
<td>1896</td>
</tr>
<tr>
<td>£16K+ pa</td>
<td>1805</td>
<td>2995</td>
<td>3278</td>
</tr>
<tr>
<td>Internet use</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Frequent user</td>
<td>2923</td>
<td>4023</td>
<td>4642</td>
</tr>
<tr>
<td>Infrequent/non-user</td>
<td>1043</td>
<td>686</td>
<td>1292</td>
</tr>
<tr>
<td>How pay</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Direct debit</td>
<td>2799</td>
<td>4135</td>
<td>4216</td>
</tr>
<tr>
<td>Standard credit</td>
<td>339</td>
<td>606</td>
<td>603</td>
</tr>
<tr>
<td>Prepayment meter</td>
<td>779</td>
<td>1087</td>
<td>1054</td>
</tr>
<tr>
<td>Supplier</td>
<td>Any of the 6 large</td>
<td>3082</td>
<td>4716</td>
</tr>
</tbody>
</table>
Chart 1  Profile of the CMA database group

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

<table>
<thead>
<tr>
<th>Group</th>
<th>2017 Base</th>
<th>2016 Base</th>
<th>2015 Base</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>%</td>
<td>%</td>
<td>%</td>
</tr>
<tr>
<td>With a medium/smaller</td>
<td>919</td>
<td>1240</td>
<td>948</td>
</tr>
<tr>
<td>supplier</td>
<td>41▲</td>
<td>34▲</td>
<td>41▲</td>
</tr>
<tr>
<td>Country</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>England</td>
<td>3453</td>
<td>5057</td>
<td>5069</td>
</tr>
<tr>
<td>Scotland</td>
<td>357</td>
<td>524</td>
<td>551</td>
</tr>
<tr>
<td>Wales</td>
<td>191</td>
<td>375</td>
<td>314</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CMA database group</th>
<th>(1,990)</th>
<th>Non CMA Group</th>
<th>(2,011)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age</td>
<td>16-34</td>
<td>19%▼</td>
<td></td>
</tr>
<tr>
<td></td>
<td>35-64</td>
<td>57%▲</td>
<td></td>
</tr>
<tr>
<td></td>
<td>65+</td>
<td>25%▼</td>
<td></td>
</tr>
<tr>
<td>Social grade</td>
<td>ABC1</td>
<td>63%▲</td>
<td></td>
</tr>
<tr>
<td></td>
<td>C2DE</td>
<td>37%▼</td>
<td></td>
</tr>
<tr>
<td>Annual household income</td>
<td>Below £16,000</td>
<td>17%▼</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Above £16,000</td>
<td>56%▲</td>
<td></td>
</tr>
<tr>
<td>Internet use</td>
<td>Daily internet user</td>
<td>83%▲</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Uses internet (less frequently)</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CMA database group (1,990)</td>
<td>Non CMA Group (2,011)</td>
<td></td>
</tr>
<tr>
<td>--------------------------------</td>
<td>---------------------------</td>
<td>-----------------------</td>
<td></td>
</tr>
<tr>
<td>Non-user</td>
<td>20%▲</td>
<td>7%▼</td>
<td></td>
</tr>
<tr>
<td>Bill type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Direct Debit</td>
<td>65%▼</td>
<td>81%▲</td>
<td></td>
</tr>
<tr>
<td>Standard Credit</td>
<td>12%▲</td>
<td>5%▼</td>
<td></td>
</tr>
<tr>
<td>PPM</td>
<td>21%▲</td>
<td>13%▼</td>
<td></td>
</tr>
<tr>
<td>Tariff type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fixed term</td>
<td>31%▼</td>
<td>63%▲</td>
<td></td>
</tr>
<tr>
<td>Variable tariff</td>
<td>52%▲</td>
<td>27%▼</td>
<td></td>
</tr>
<tr>
<td>Mixed</td>
<td>2%</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>Whether has smart meter</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>6%▼</td>
<td>11%▲</td>
<td></td>
</tr>
<tr>
<td>No</td>
<td>94%▲</td>
<td>89%▼</td>
<td></td>
</tr>
</tbody>
</table>
5 Questionnaire and filters

5.1 Changes and additions made to questionnaire between 2016 and 2017

<table>
<thead>
<tr>
<th>Type/ description</th>
<th>Question number</th>
<th>Question name</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amendment/ change to question wording</td>
<td>Intro1</td>
<td>Intro1</td>
<td>I would now like to ask you some questions about gas and electricity suppliers on behalf of Ofgem, the independent energy regulator for Great Britain</td>
<td>I would now like to ask you some questions about gas and electricity suppliers on behalf of Ofgem, the independent energy regulator for Great Britain. To start with, a few questions to make sure we are speaking with the right people</td>
</tr>
<tr>
<td>Addition/ new question</td>
<td>Intro1a</td>
<td>Intro2</td>
<td></td>
<td>Before we start to speak about energy, I would like to ask a few questions about you. The first few questions are about whether and how you like to shop around for major service providers or for major purchases - not just for energy</td>
</tr>
<tr>
<td>Type/ description</td>
<td>Question number</td>
<td>Question name</td>
<td>2016</td>
<td>2017</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>----------------</td>
<td>--------------</td>
<td>------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Addition/ new question</td>
<td>New1</td>
<td>Empow</td>
<td></td>
<td>To what extent do you agree or disagree with these things? i. As soon as I see a problem or challenge I start looking for possible solutions ii. I am able to follow through with things once I've made up my mind to do something iii. I can't possibly know everything before making a decision iv. I usually continue to search for an item until it reaches my expectations v. When shopping for a major purchase, I don't mind spending several hours looking for it vi. I would rather stick with a product that I currently buy than try something I'm not sure of vii. I am usually among the first to try a new product when it appears on the market viii. I will give in if a negotiation is not going my way ix. When looking for new products and services, I often find the amount of information overwhelming x. I always like to look for ways that I can save money, even if it is only a little xi. I always check bank or building society statements when I get them, including online</td>
</tr>
<tr>
<td>Amendment/ change to answer codes</td>
<td>Q3</td>
<td>Q3</td>
<td>Old supplier list</td>
<td>New supplier list</td>
</tr>
<tr>
<td>Amendment/ change to answer codes</td>
<td>Q4</td>
<td>Q4</td>
<td>Old supplier list</td>
<td>New supplier list</td>
</tr>
<tr>
<td>Amendment/ change to answer codes</td>
<td>Q151</td>
<td>Q151</td>
<td>Old supplier list</td>
<td>New supplier list</td>
</tr>
<tr>
<td>Amendment/ change to answer codes</td>
<td>Q5 (code 7)</td>
<td>Q5 (code 7)</td>
<td>Payment card / book where you can pay money in whenever you choose (ad hoc)</td>
<td>Payment book/card where you can pay money in whenever you choose (ad hoc). Payments you make are automatically deducted from your next bill</td>
</tr>
<tr>
<td>Type/ description</td>
<td>Question number</td>
<td>Question name</td>
<td>2016</td>
<td>2017</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>-----------------</td>
<td>---------------</td>
<td>----------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Amendment/ change to answer codes</td>
<td>Q6 (code 7)</td>
<td>Q6</td>
<td>Payment card \ book where you can pay money in whenever you choose (ad hoc)</td>
<td>Payment book/card where you can pay money in whenever you choose (ad hoc). Payments you make are automatically deducted from your next bill</td>
</tr>
<tr>
<td>Addition/ new question</td>
<td>New4</td>
<td>PayTy</td>
<td></td>
<td>Can I just check, do you &lt;pay a single direct debit/receive a single bill&gt; for your gas and electricity supply, or &lt;do two direct debits come out of your account/are they billed separately&gt;?</td>
</tr>
<tr>
<td>Amendment/ change to question wording</td>
<td>Q8</td>
<td>Q8</td>
<td>Approximately how much do you spend on home energy? That is electricity and mains gas if you have it. You can answer per year, per month or per week, but this should be on average across the whole year, including the winter. INTERVIEWER INSTRUCTION: The next question will ask you to record the timescale (i.e. per year, month or week)</td>
<td>Approximately how much do you spend on home energy? That is electricity and mains gas if you have it. You can answer per year, per month or per week, but this should be on average across the whole year, including the winter. If you're not sure, you can just give me an approximate value. INTERVIEWER INSTRUCTION: The next question will ask you to record the timescale (i.e. per year, month or week) and whether this is the actual amount or an approximation.</td>
</tr>
<tr>
<td>Addition/ new question</td>
<td>New5</td>
<td>Apprx</td>
<td></td>
<td>And can I check, is that the actual amount you pay or an approximation?</td>
</tr>
<tr>
<td>Amendment/ change to question wording</td>
<td>Q153/ 89/90</td>
<td>Q153 / 89 / 90</td>
<td>How familiar would you say you are with the features of your current dual fuel / gas / electricity tariff? I mean the rate you pay and any discounts, any standing charges that apply, exit fees or benefits that you receive 1. Completely 2. Fairly 3. Not very 4. Not at all</td>
<td>How familiar would you say you are with the features of your current energy / gas / electricity tariff? I mean the rate you pay and any discounts, any standing charges that apply, exit fees or benefits that you receive. 1. Completely 2. Fairly 3. Not very 4. Not at all</td>
</tr>
<tr>
<td>Amendment/ change to question wording</td>
<td>Q10</td>
<td>Q10</td>
<td>An energy tariff is the pricing plan for the &lt;<em>&gt; that you use. Are you on an online tariff, that is &lt;</em>&gt; account that you manage over the internet?</td>
<td>Do you primarily manage your &lt;gas/ electricity/ gas and electricity&gt; account online or via an app?</td>
</tr>
<tr>
<td>Type/ description</td>
<td>Question number</td>
<td>Question name</td>
<td>2016</td>
<td>2017</td>
</tr>
<tr>
<td>-------------------</td>
<td>----------------</td>
<td>--------------</td>
<td>------</td>
<td>------</td>
</tr>
<tr>
<td>Amendment/ change to question wording</td>
<td>Q11</td>
<td>Q11</td>
<td>A fixed term tariff is a tariff that has a definite end date. Are you on a fixed term tariff for &lt;gas / electricity / gas and electricity&gt;?</td>
<td>A fixed term tariff is a tariff that has a definite end date. Are you on a fixed term tariff for &lt;gas / electricity / gas and electricity&gt;? IF NECESSARY: These tariffs often state the length in their name, such as a 12 months fix, or a March 2018 fix</td>
</tr>
<tr>
<td>Amendment/ change to question wording</td>
<td>Q13</td>
<td>Q13</td>
<td>Do you have an electricity meter that charges different amounts at different times of the day?</td>
<td>Do you pay different amounts for your energy depending on when you use it. For example, energy costs you less at night-time or you get free energy at the weekend?</td>
</tr>
<tr>
<td>Addition/ new question</td>
<td>SM1</td>
<td>SM1</td>
<td>Smart meters monitor energy consumption in the home. Before today had you heard of smart meters?</td>
<td></td>
</tr>
<tr>
<td>Addition/ new question</td>
<td>SM2</td>
<td>SM2</td>
<td>Which of the statements below do you think most accurately describes who can install a smart meter?</td>
<td></td>
</tr>
<tr>
<td>Addition/ new question</td>
<td>SM3</td>
<td>SM3</td>
<td>And which, if any, of the following statements about smart meters do you believe to be true? You can select more than one statement</td>
<td></td>
</tr>
<tr>
<td>Addition/ new question</td>
<td>SM4</td>
<td>SM4</td>
<td>Do you have a smart meter?</td>
<td></td>
</tr>
<tr>
<td>Addition/ new question</td>
<td>SM6</td>
<td>SM6</td>
<td>As a result of getting a smart meter, to what extent do you do the following things? Please only think about what you've done since you've received a smart meter, compared to what you did before you had a smart meter. Since receiving a smart meter, to what extent... 1. Do you use less energy 2. Do you use certain appliances or devices less often 3. Have you stopped using certain appliances or devices 4. Do you turn off the lights more 5. Do you keep the thermostat at a lower temperature&quot;</td>
<td></td>
</tr>
<tr>
<td>Type/ description</td>
<td>Question number</td>
<td>Question name</td>
<td>2016</td>
<td>2017</td>
</tr>
<tr>
<td>-------------------</td>
<td>----------------</td>
<td>--------------</td>
<td>------</td>
<td>------</td>
</tr>
<tr>
<td>Amendment/ change to question wording</td>
<td>Q21</td>
<td>Q21</td>
<td>How many times have you ever switched your gas supplier? 1. Once 2. Twice 3. Three times 4. Four times or more</td>
<td>How many times, if at all, have you ever switched your gas supplier? 1: Once 2: Twice 3: Three times 4: Four times or more 5: Don't know how many times, but I definitely have switched gas supplier before 6: Have never switched gas supplier</td>
</tr>
<tr>
<td>Amendment/ change to question wording</td>
<td>Q138</td>
<td>Q138</td>
<td>When did you last do this? 1. Between 1 and 2 years ago 2. Between 2 and 5 years ago 3. Between 5 and 9 years ago 4. 10 or more years ago</td>
<td>When did you last switch gas supplier? 1. In the last 12 months 2. Between 1 and 2 years ago 3. Between 2 and 3 years ago 4. Between 3 and 4 years ago 5. Between 4 and 5 years ago 6. Between 5 and 9 years ago 7. 10 or more years ago</td>
</tr>
<tr>
<td>Amendment/ change to question wording</td>
<td>Q22</td>
<td>Q22</td>
<td>How many times have you ever switched your electricity supplier? 1. Once 2. Twice 3. Three times 4. Four times or more</td>
<td>How many times, if at all, have you ever switched your electricity supplier? 1: Once 2: Twice 3: Three times 4: Four times or more 5: Don't know how many times, but I definitely have switched gas supplier before 6: Have never switched electricity supplier</td>
</tr>
<tr>
<td>Amendment/ change to question wording</td>
<td>Q139</td>
<td>Q139</td>
<td>When did you last do this? 1. Between 1 and 2 years ago 2. Between 2 and 5 years ago 3. Between 5 and 9 years ago 4. 10 or more years ago</td>
<td>When did you last switch electricity supplier? 1. In the last 12 months 2. Between 1 and 2 years ago 3. Between 2 and 3 years ago 4. Between 3 and 4 years ago 5. Between 4 and 5 years ago 6. Between 5 and 9 years ago 7. 10 or more years ago</td>
</tr>
<tr>
<td>Type/ description</td>
<td>Question number</td>
<td>Question name</td>
<td>2016</td>
<td>2017</td>
</tr>
<tr>
<td>-------------------</td>
<td>-----------------</td>
<td>---------------</td>
<td>------</td>
<td>------</td>
</tr>
<tr>
<td>Amendment/ change to question wording</td>
<td>Q154</td>
<td>Q154</td>
<td>Thinking about the last time you switched an energy supplier, did you switch both gas and electricity at the same time? 1. Yes 2. No</td>
<td>Thinking about the last time you switched an energy supplier, which of these did you do? The last time I switched, I switched… 1: ... gas supplier only 2: ...electricity supplier only 3: ... gas and electricity suppliers at the same time</td>
</tr>
<tr>
<td>Addition/ new question</td>
<td>New30</td>
<td>TmesG</td>
<td></td>
<td>How many times if at all, have you ever switched your gas tariff? By this we mean, staying with the same gas supplier, but changing your deal e.g. moving from the supplier’s variable rate to a fixed rate? Please don’t think here about times when you have switched supplier, but just about when you switched tariff</td>
</tr>
<tr>
<td>Addition/ new question</td>
<td>New31</td>
<td>WhnSG</td>
<td></td>
<td>When did you last switch gas tariff?</td>
</tr>
<tr>
<td>Addition/ new question</td>
<td>New22</td>
<td>TmesE</td>
<td></td>
<td>How many times if at all, have you ever switched your electricity tariff? By this we mean, staying with the same electricity supplier, but changing your deal e.g. moving from the supplier’s variable rate to a fixed rate? Please don’t think here about times when you have switched supplier, but just about when you switched tariff</td>
</tr>
<tr>
<td>Addition/ new question</td>
<td>New23</td>
<td>WhnSE</td>
<td></td>
<td>When did you last switch electricity tariff?</td>
</tr>
<tr>
<td>Addition/ new question</td>
<td>New24</td>
<td>Switch</td>
<td></td>
<td>Thinking about the last time you switched an energy tariff which of these did you do? The last time I switched, I switched… 1: … gas tariff only 2: … electricity tariff only 3: … gas and electricity tariffs at the same time</td>
</tr>
<tr>
<td>Type/ description</td>
<td>Question number</td>
<td>Question name</td>
<td>2016</td>
<td>2017</td>
</tr>
<tr>
<td>-------------------</td>
<td>----------------</td>
<td>--------------</td>
<td>------</td>
<td>------</td>
</tr>
<tr>
<td>Addition/ new question</td>
<td>New14</td>
<td>ChngG</td>
<td></td>
<td>Thinking about your gas supply, which if any of these have you done in the past 12 months? 1. Changed payment method 2. Compared my gas tariff with those offered by other gas suppliers 3: Compared my gas tariff with those offered by my own supplier</td>
</tr>
<tr>
<td>Addition/ new question</td>
<td>New13</td>
<td>ChngE</td>
<td></td>
<td>Thinking about your electricity supply, which if any of these have you done in the past 12 months? 1. Changed payment method 2. Compared my electricity tariff with those offered by other electricity suppliers 3: Compared my electricity tariff with those offered by my own supplier</td>
</tr>
<tr>
<td>Addition</td>
<td></td>
<td></td>
<td></td>
<td>In previous surveys, respondents were asked separately about each tariff or supplier switch. For 2017, the decision was taken to only ask about one experience, to improve data quality (and reflecting the fact that most people now have a single supplier for both fuels, and tariff or supplier switches tend to happen for both at the same time). A priority was set up to select which to focus on through the remainder of the interview, as follows: A. Supplier switch B. Tariff switch C. Comparisons of tariffs or suppliers The definitions for the priorities are detailed below.</td>
</tr>
<tr>
<td>Type/ description</td>
<td>Question number</td>
<td>Question name</td>
<td>2016</td>
<td>2017</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>-----------------</td>
<td>---------------</td>
<td>----------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Addition/ new dummy variable</td>
<td>New15</td>
<td>Dummset</td>
<td></td>
<td>Dummy variable to determine whether switched, changed tariff or compared tariffs; where multiple responses given, this variable provides a hierarchy of choice for the CAI script: 1 (switched gas supplier) = q138=1 AND NOT q154=3 2 (switched electricity supplier) = q139=1 AND NOT q154=3 3 (switched gas and electricity suppliers together) = q154=3 4 (switched gas tariff) = WhnSG=1 AND NOT switch=3 5 (switched electricity tariff) = WhnSE=1 AND NOT switch=3 6 (switched gas and electricity tariff together) = switch=3 7 (compared gas suppliers) = ChngG = 2 8 (compared gas tariffs offered by your own supplier) = ChngG=3 9 (compared electricity suppliers) = ChngE=2 10 (compared electricity tariffs offered by your own supplier) = ChngE=3</td>
</tr>
<tr>
<td>Amendment/ change to question wording</td>
<td>Q160</td>
<td>Q160</td>
<td>Thinking of the last time you switched or compared &lt;sup&gt;?&lt;/sup&gt; supplier or tariffs, what were the main things you wanted to achieve? INTERVIEWER INSTRUCTION: Multi code up to 3 responses 1 Save money 2 Get better customer service</td>
<td>Thinking of the last time you &lt;sup&gt;answer from&lt;/sup&gt; Dumm1, what were your priorities? IF 'Saving money' PROBE TO PRECODES PROBE: What other things were your priorities?</td>
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|                  | 3               | Get other benefits (e.g. loyalty points) | 4 Wanted a dual fuel package  
5 Wanted a fixed term \ fixed price deal  
6 Wanted a 'greener' tariff  
7 Wanted an online tariff | CODE UP TO 3 RESPONSES  
1: Saving money/paying less than before  
2. Avoiding price rise  
3: Get better customer service  
4: Wanted a 'greener' tariff  
5: Wanted a fixed term \ fixed price deal  
6: Wanted a dual fuel package  
7: Wanted an online tariff  
8. Wanted to bundle with other services (e.g. energy and broadband or telephone combined)  
9: Get other benefits (e.g. loyalty points)  
10: The reputation of the supplier  
11: Getting a smart meter \ in home display  
12: Home energy related incentives (e.g. boiler maintenance, home insulation)  
13: Preference for Big 6 (British Gas, Scottish Power, SSE, Eon, NPW aer, EDF)  
14: Preference to avoid the Big 6 (British Gas, Scottish Power, SSE, Eon, NPW aer, EDF)  
15: A supplier I know  
16. To avoid the hassle of switching  
97: Other - please type in |
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<tr>
<td>Addition/ new question</td>
<td>New16</td>
<td>MainP</td>
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</table>

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

READ OUT
1: Saving money/paying less than before
2. Avoiding price rise
3: Get better customer service
4: Wanted a ‘greener’ tariff
5: Wanted a fixed term \ fixed price deal
6: Wanted a dual fuel package
7: Wanted an online tariff
8. Wanted to bundle with other services (e.g. energy and broadband or telephone combined)
9: Get other benefits (e.g. loyalty points)
10: The reputation of the supplier
11: Getting a smart meter \ in home display
12: Home energy related incentives (e.g. boiler maintenance, home insulation)
13: Preference for Big 6 (British Gas, Scottish Power, SSE, Eon, NPower, EDF)
14: Preference to avoid the Big 6 (British Gas, Scottish Power, SSE, Eon, NPower, EDF)
15: A supplier I know
16. To avoid the hassle of switching
97: Other - please type in
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</table>
| Amendment/ change to question wording | Q161 | Q161 | And what were the main reasons that caused you to do this? INTERVIEWER INSTRUCTION: Multi code up to 3 responses  
1 I received a bill or direct debit \ prepayment statement from my supplier  
2 I received a price increase notice from my supplier  
3 I received an end of fixed term tariff notice from my supplier  
4 I received an annual summary or review from my supplier  
5 I received a ‘dead notice’ from my supplier about my tariff  
6 I saw a message on a communication from my supplier about how I could make savings by changing tariff or payment method with my current supplier  
7 I received another communication from my supplier  
8 I experienced poor customer service  
9 I moved home  
10 I heard my energy supplier’s prices were going up  
11 Media coverage about energy suppliers in general  
12 I was looking at a money saving website  
13 I saw an advert on TV article in the newspaper  
15 I saw an advert  
16 Advert other  
17 Talked to a friend, family member, or neighbour  
18 I saw an advert online  
19 I saw someone post something on social media (Facebook, Instagram, twitter etc.)  
97 Other | New codes are shown in bold  
And thinking about the last time you <answer from Dumm1>, what were the main reasons that caused you to do that?  
IF NECESSARY: Was it something that happened that made you start to think about it, or was there something that you saw or heard or read?  
INTERVIEWER INSTRUCTION: Multiple code up to 3 responses  
1 I received a bill or direct debit \ prepayment statement from my supplier  
2 I received a price increase notice from my supplier  
3 I received an end of fixed term tariff notice from my supplier  
4 I received an annual summary or review from my supplier  
5 I received information about my energy consumption from my supplier  
6 I received a ‘dead notice’ from my supplier about my tariff  
7 I saw a message on a communication from my supplier about how I could make savings by changing tariff or payment method with my current supplier  
8 I received another communication from my supplier  
9.  I received a communication from another supplier  
10 I experienced poor customer service  
11 I moved home  
12 I heard my energy supplier's prices were going up  
13 Media coverage about energy suppliers in general  
14 I was looking at a money saving website |
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<tr>
<td>Amendment/ change to answer codes</td>
<td>Q165</td>
<td>Q165</td>
<td></td>
<td>New code added &quot;Using an automated switching service (e.g. Flipper, Voltz, Swuto, Energy Scanner)&quot;</td>
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<tr>
<td>Addition/ new question</td>
<td>New9</td>
<td>Deals</td>
<td></td>
<td>You mentioned that you found out about the deals offered when you last &lt;answer from Dumm1&gt; using an online price comparison service. How many online price comparison sites did you visit?</td>
</tr>
<tr>
<td>Addition/ new question</td>
<td>New9a</td>
<td>NotSh</td>
<td></td>
<td>Are there any particular reasons why you have not &lt;shopped around to see if there are any better energy deals /switched tariff or switched supplier&gt;? CHOOSE ALL THAT APPLY. CODE FIRST MENTION THEN OTHER MENTIONS INTERVIEWER: IF RESPONDENT SAYS &quot;HAPPY WITH/LIKE CURRENT SUPPLIER&quot; THEN PROBE WHAT DO YOU LIKE ABOUT YOUR EXISTING SUPPLIER?</td>
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<td>New33</td>
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<td>Addition/ new question</td>
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Apart from salespeople working for energy companies, has anyone made any of these recommendations to you in the last 12 months? This could be a friend, family member, someone you know on social media, or another organisation.

Who made those recommendations?

Can I just check, the last time you <answer from Dumm1>, which of these best describes what you did?
1. Switched from a variable tariff to a fixed term tariff
2. Switched from a variable tariff to another variable tariff
3. Switched from a fixed term tariff to a variable tariff
4. Switched from a fixed term tariff to another fixed term tariff

New code added: Using an automated switching service (e.g. Flipper, Voltz, Swuto, Energy Scanner)

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

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

Thinking of the last time you switched your energy supplier, how much do you agree or disagree with the statement?
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<tr>
<td>Amendment/ change to question wording</td>
<td>Q166</td>
<td>Q166</td>
<td>To the best of your knowledge, do you feel that you are now paying less than you would have if you had not switched your &lt;?&gt; tariff or supplier?</td>
<td>To the best of your knowledge, do you feel that you are now paying less than you would have if you had not &lt;answer from Dumm1&gt;?</td>
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<tr>
<td>Addition/ new question</td>
<td>New</td>
<td>MoreP</td>
<td>If you hadn’t &lt;INSERT answer from Dumm1&gt; how much more do you think you would be paying now for your &lt;gas/electricity/energy&gt;? You can answer per year, per month or per week, but this should be on average across the whole year, including the winter. If you're not sure, you can just give me an approximate value. INTERVIEWER INSTRUCTION: The next question will ask you to record the timescale (i.e. per year, month or week) and whether this is the actual amount or an approximation.</td>
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<tr>
<td>Addition/ new question</td>
<td>New</td>
<td>Freqc</td>
<td>Interviewer code, is that… 1: Weekly 2: Fortnightly 3: Every four weeks 4: A calendar month 5: Quarterly 6: Twice yearly 7: Annual</td>
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<tr>
<td>Addition/ new question</td>
<td>New</td>
<td>Apprx2</td>
<td>And can I check, is that the actual amount or an approximation?</td>
<td></td>
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<tr>
<td>Addition/ new question</td>
<td>NewA</td>
<td>OwedM</td>
<td>When you last &lt;answer from Dumm1&gt;, were you owed money by your old supplier(s)? This may have been because you had a positive credit balance with the old supplier(s)</td>
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<tr>
<td>Addition/ new question</td>
<td>NewB</td>
<td>MonRe</td>
<td>And how satisfied or dissatisfied were you with how quickly the money was returned to you by your old supplier(s)</td>
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<tr>
<td>Amendment/ change to question wording</td>
<td>Q122</td>
<td>Q122</td>
<td>What factors matter most to you when choosing your energy supplier or tariff? INTERVIEWER INSTRUCTION: Multi code up to 3 responses</td>
<td>If you were to switch supplier or tariff, what would be your priorities when choosing a new deal? IF 'Saving money' PROBE TO PRECODES PROBE: What other priorities would you have? CODE UP TO 3 RESPONSES 1: Saving money/ paying less than before 2: Avoiding price rise 3: Customer service 4: Having a greener tariff 5: Having a fixed term/fixed price tariff 6: Having a dual fuel package 7: Having an online tariff 16: Wanted to bundle with other services (e.g. energy and broadband or telephone combined) 8: Getting other benefits (e.g. loyalty points) 9: The reputation of the supplier 10: Getting a smart meter \ in home display 11: Home energy related incentives (e.g. boiler maintenance, home insulation) 12: Preference for Big 6 (British Gas, Scottish Power, SSE, Eon, NPower, EDF) 13: Preference to avoid the Big 6 (British Gas, Scottish Power, SSE, Eon, NPower, EDF) 14: A supplier I know 16: To avoid the hassle of switching 97: Other - SPECIFY</td>
</tr>
<tr>
<td>Addition/ new question</td>
<td>New28</td>
<td>PrioM</td>
<td>And which of these would be your main priority? Would it be…</td>
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<tr>
<td>Addition/ new question</td>
<td>New17</td>
<td>Tried</td>
<td>Can I just check, in the past 12 months have you tried to switch gas or electricity supplier but have been unable to for some reason? Please don't think about changing tariff with the same supplier, we are only interested in times when you have tried to change supplier</td>
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<tr>
<td>Addition/ new question</td>
<td>New18</td>
<td>Descr</td>
<td>Which, if any of these describe what happened?</td>
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<tr>
<td>Addition/ new question</td>
<td>New19</td>
<td>PCWSit</td>
<td>To what extent do you agree or disagree with these things about price comparison websites? i. Price comparison websites all have the same energy deals on them ii. Price comparison websites are unbiased in the way they display energy deals iii. Price comparison websites make clear how potential savings are calculated</td>
<td></td>
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<tr>
<td>Amendment/ change to question wording</td>
<td>Q121</td>
<td>Q121</td>
<td>To what extent do you agree or disagree with the following statements about energy suppliers&quot; (7 statements) 1. It's too hard to work out whether I would save or not if I switched 2. There are no real differences between suppliers in the prices they charge 3. Switching is a hassle that I've not got time for 4. I worry that if I switch things will go wrong 5. I don't think I'd be able to switch even if I wanted to 6. Some energy suppliers are more trustworthy than others 7. Changing tariff with your existing supplier is a good way to save money</td>
<td>How much do you agree or disagree...? i) Switching is a hassle that I've not got time for ii) I worry that if I switch things will go wrong iv) Switching energy suppliers takes too long v) As far as I know, most of my family and friends regularly switch their energy supplier vi) It's too hard to work out whether I would save or not if I switched&quot;</td>
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<tr>
<td>Amendment/ change to list of statements</td>
<td>Q121</td>
<td>Q121</td>
<td>2016 statements: i) It's too hard to work out whether I would save or not if I switched ii) There are no real differences between suppliers in the prices they charge iii) Switching is a hassle that I've not got time for iv) I worry that if I switch things will go wrong</td>
<td>Change to code list, with some deletions/additions. 2017 statements: To what extent do you agree or disagree with the following statements about energy suppliers? i) Switching is a hassle that I've not got time for ii) I worry that if I switch things will go wrong iv) Switching energy suppliers takes too long v) As far as I know, most of my family and friends regularly switch their energy supplier</td>
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<td>v) I don't think I'd be able to switch even if I wanted to</td>
<td>vi) It's too hard to work out whether I would save or not if I switched</td>
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<td>vi) Some energy suppliers are more trustworthy than others</td>
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<td>vii) Changing tariff with your existing supplier is a good way to save money</td>
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<td>Addition/ new question</td>
<td>New7</td>
<td>Risks</td>
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<td>What, if anything, do you think might be the risks associated with switching energy suppliers? CODE ALL MENTIONED: PROBE: What other risks can you think of?</td>
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<td>Addition/ new question</td>
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<td>If someone was to switch to a new energy supplier, how long do you think the process takes from the time that they ask to switch, to the time that the new supplier starts to supply their energy? You can answer in days or weeks</td>
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<td>Addition/ new question</td>
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<td>How confident or unconfident do you feel about doing these things related to energy suppliers? i. Comparing the different energy deals available ii. Choosing the best energy deal for your household iii. Making a complaint to your energy supplier, if you had a reason to complain iv. Understanding your energy bill</td>
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<td>To what extent do you agree or disagree with these statements about energy suppliers ii. I would be wary of using an energy supplier I have never heard of iii. If I was going to change energy supplier, I would look for a supplier who offered me extra rewards</td>
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<td>Addition/ new question</td>
<td>New</td>
<td>RateS_G</td>
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<td>iv. I would be happy to pay slightly more for my energy if my supplier offered me better customer service</td>
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<tr>
<td>Addition/ new question</td>
<td>New</td>
<td>RateS_E</td>
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<td>How do you rate your current electricity supplier in terms of value for money?</td>
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<td>Addition/ new question</td>
<td>New</td>
<td>RateS_D</td>
<td></td>
<td>How do you rate your current energy supplier in terms of value for money?</td>
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<td>Addition/ new question</td>
<td>New</td>
<td>NotCM</td>
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<td>Why did you not make a complaint at that time</td>
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<td>Addition/ new question</td>
<td>New20</td>
<td>Repre</td>
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<td>In the last 12 months has a representative of your supplier or another energy supplier attempted to sell you a new energy deal in any of these ways?</td>
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<tr>
<td>Addition/ new question</td>
<td>New21</td>
<td>Words</td>
<td></td>
<td>Thinking about the last time &lt;SUBSTITUTE IN BASED ON REPRE&gt; by &lt;your energy supplier/another energy supplier&gt;, which, if any, of these words or phrases describe the &lt;call/salesperson&gt;?</td>
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<tr>
<td>Amendment/ change to answer codes</td>
<td>Q94</td>
<td>Q94</td>
<td>Do you recall receiving any of the following from your gas or electricity supplier in the last 12 months? You may have received these via post or email. An annual summary or review (containing details about your own energy tariff and energy use) At least one bill or direct debit \ repayment statement A price increase notification letter INTERVIEWER INSTRUCTION: Price Increase Notification letters exclude letters regarding price reductions but include letters regarding any other changes to a consumer's tariff price. A letter informing you your fixed term tariff is coming to an end</td>
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<tr>
<td>Amendment/ change to answer codes</td>
<td>Q94</td>
<td>Q94</td>
<td>Do you recall receiving any of the following from your gas or electricity supplier in the last 12 months? You may have received these via post or email. i) An annual summary or review (containing details about your own energy tariff and energy use) ii) At least one bill or direct debit \ repayment statement iii) A price increase notification letter iv) A letter informing you your fixed term tariff is coming to an end INTERVIEWER INSTRUCTION: Price Increase Notification letters exclude letters regarding price reductions but include letters regarding any other changes to a consumer's tariff price.</td>
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| Amendment/ change to question wording | Q120 | Q120 | For which, if any, of the following services have you switched your provider in the last 12 months?  
1 Landline phone calls  
2 Mobile phone network  
3 Internet or broadband provider  
4 Cash ISA  
5 Balance transfer on a credit card  
6 Current account | For which, if any, of the following services have you switched your provider in the last 12 months?  
For each of :  
i: Mobile phone network  
ii: Internet or broadband provider  
iii: Current Account  
iv: Home insurance  
v: Car insurance  
1. Yes I've switched  
2. No I haven't  
3. Not applicable because I don't have this product |
| Addition/ new question | New | Onlin | Which of the following do you personally own?  
1. Mobile phone (capable of making calls and sending messages, but with no or limited access to internet or email)  
2. Smartphone (can download apps and games via the internet, typically has a touchscreen)  
3. Tablet  
4. Laptop  
5. Desktop PC  
6. None of the above |
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<th>Type/ description</th>
<th>Question number</th>
<th>Question name</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amendment/ change to answer codes</td>
<td>Q130</td>
<td>Q130</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Amendment/ change to answer codes</td>
<td>Q131</td>
<td>Q131</td>
<td>Code 3: No</td>
<td>Code 3: No, no-one</td>
</tr>
<tr>
<td>Addition/ new question</td>
<td></td>
<td>Disa</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Addition/ new question</td>
<td></td>
<td>Welbi</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Amendment/ change to answer codes**
- Q130: Codes reordered as:
  1. Professional qualifications
  2. Post graduate degree (MA, MSc, PhD etc.)
  3. Degree
  4. HND\HNC
  5. ONC\OND\City & Guilds
  6. GNVQ
  7. A Levels\AS Levels
  8. GCSE\O Levels\CSE
  96. None
  98. Refused
  99. Don't know

**Addition/ new question**

**Disa**

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

**Welbi**

Which one of the following statements best describes how well you are keeping up with your bills and credit commitments at the moment?
- 1. I am / we are keeping up with all bills and commitments without any difficulties
<table>
<thead>
<tr>
<th>Type/ description</th>
<th>Question number</th>
<th>Question name</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>2. I am / we are keeping up with all bills and commitments, but it is a struggle from time to time</td>
<td>3. I am / we are keeping up with all bills and commitments, but it is a constant struggle</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>4. I am / we are falling behind with some bills or credit commitments</td>
<td>5. I am / we are having real financial problems and have fallen behind with many bills or credit commitments</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>6. I / we don’t have any bills or credit commitments</td>
<td>99. Don’t know</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>98. Refused</td>
<td></td>
</tr>
<tr>
<td>Addition/ new question</td>
<td>Arrea</td>
<td></td>
<td>In the last twelve months, has the household been in arrears on your gas or electricity bills.</td>
<td>1 Yes, once</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2 Yes, twice or more</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>3 No</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>98: Refused</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>99: Don’t know</td>
</tr>
</tbody>
</table>

### 5.2 – Deletions made to questionnaire between 2016 – 2017

<table>
<thead>
<tr>
<th>Question number</th>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q.7</td>
<td>Q.7 Do you receive a dual fuel discount for buying your gas and electricity from the same energy supplier?</td>
</tr>
<tr>
<td>Q.86</td>
<td>Q.86 How familiar would you say you are with the range of different energy tariffs available to you from energy suppliers in general?</td>
</tr>
<tr>
<td>Q.152/87/88</td>
<td>How familiar would you say you are with the range of different tariffs available to you from your current energy /gas /electricity supplier?</td>
</tr>
<tr>
<td>Q17</td>
<td>What would be the minimum amount of money you would have to save to encourage you to switch your gas or electricity supplier? Just approximately. You can answer per year, per month or per week.</td>
</tr>
<tr>
<td>Q.137</td>
<td>Interviewer code, was that...</td>
</tr>
<tr>
<td>Q.155</td>
<td>And before you switched, did the same energy supplier (i.e. a single supplier) provide your gas and electricity?</td>
</tr>
<tr>
<td>Q. 158/ 25/ 30</td>
<td>And who was your previous energy / gas / electricity supplier?</td>
</tr>
<tr>
<td>Q.26/31</td>
<td>In the last 12 months, have you changed the payment method with your gas/ electricity supplier?</td>
</tr>
<tr>
<td>Q. 72/32</td>
<td>How did you previously pay for your gas/ electricity?</td>
</tr>
<tr>
<td>Q. 35/36</td>
<td>In the last 12 months, did you change the tariff you were on with your existing gas/ electricity supplier (without switching supplier)?</td>
</tr>
<tr>
<td>Q. 37/39</td>
<td>Have you ever changed your tariff with an existing gas/ electricity supplier?</td>
</tr>
<tr>
<td>Q. 41/42</td>
<td>In the last 12 months, did you compare the gas/ electricity tariff you were on with those offered by other suppliers?</td>
</tr>
<tr>
<td>Q. 43/44</td>
<td>In the last 12 months, did you compare the gas/ electricity tariff you were on with any others available with your existing supplier?</td>
</tr>
<tr>
<td>Q. 159</td>
<td>The last time you switched or compared tariff or supplier, was this regarding just gas, just electricity or both gas and electricity at the same time?</td>
</tr>
<tr>
<td>Q. 162</td>
<td>And how did you find out more about your existing tariff or energy use?</td>
</tr>
<tr>
<td>Q. 163</td>
<td>And thinking about the information that you wanted about your existing &lt;Tariff&gt; tariff or energy use, how easy or difficult was it...?</td>
</tr>
<tr>
<td>Q. 58</td>
<td>What have you heard about energy suppliers and the energy market in the last 12 months?</td>
</tr>
<tr>
<td>Q. 72</td>
<td>And please tell me the extent to which you trust or distrust the following to be fair in the way they deal with customers or citizens?</td>
</tr>
<tr>
<td>Q. 71</td>
<td>In the last 12 months, have you seen any information from your energy supplier about their requirement to treat customers fairly?</td>
</tr>
<tr>
<td>Q. 167</td>
<td>And where did you see this information?</td>
</tr>
<tr>
<td>Q. 146</td>
<td>Why do you say that?</td>
</tr>
<tr>
<td>Q. 74</td>
<td>And would you say it is easier or harder to compare energy tariffs than a year ago?</td>
</tr>
<tr>
<td>Q. 75</td>
<td>Why do you say that?</td>
</tr>
<tr>
<td>Q. 79</td>
<td>Which energy company did you most recently complain to?</td>
</tr>
<tr>
<td>Q. 80</td>
<td>Thinking of the last time you complained, taking everything into account regarding the complaints process, how satisfied or dissatisfied were you overall with the way in which your complaint was handled by the energy supplier?</td>
</tr>
<tr>
<td>Q. 83</td>
<td>Which supplier did you have contact with most recently?</td>
</tr>
<tr>
<td>Q. 84</td>
<td>How satisfied or dissatisfied overall were you with the way the supplier dealt with you?</td>
</tr>
<tr>
<td>Q. 98</td>
<td>Did you take any of the following actions as a result of receiving the annual summary? (I checked what I’m currently paying for my energy or found out about the tariff that I’m on / I looked into switching tariffs with my current supplier / I looked into switching to a different supplier / I thought about switching tariffs either with this supplier or a different supplier, but have not yet started looking)</td>
</tr>
<tr>
<td>Q. 102</td>
<td>Did you take any of the following action as a result of receiving the bill or direct debit/prepayment statement? (I checked what I’m currently paying for my energy or found out about the tariff that I’m on / I looked into switching tariffs with my current supplier / I looked into switching to a different supplier / I thought about switching tariffs either with this supplier or a different supplier, but have not yet started looking / I used the QR code to find out more about my existing tariff or to compare tariffs)</td>
</tr>
<tr>
<td>Q. 106</td>
<td>Did you take any of the following action as a result of receiving the price increase notice? (I checked what I’m currently paying for my energy or found out about the tariff that I’m on / I looked into switching tariffs with my current supplier / I looked into switching to a different supplier / I thought about switching tariffs either with this supplier or a different supplier, but have not yet started looking)</td>
</tr>
<tr>
<td>Q. 110</td>
<td>Did you take any of the following action as a result of receiving the end of fixed term letter? (I checked what I’m currently paying for my energy or found out about the tariff that I’m on / I looked into switching tariffs with my current supplier / I looked into switching to a different supplier / I thought about switching tariffs either with this supplier or a different supplier, but have not yet started looking)</td>
</tr>
<tr>
<td>Q. 168</td>
<td>Energy suppliers are required to notify customers about savings they could make by managing their account online, changing tariff or changing their payment method with their current supplier. Do you recall seeing a message like this?</td>
</tr>
<tr>
<td>Q.169</td>
<td>And where did you see this?</td>
</tr>
<tr>
<td>Q.170</td>
<td>And to what extent, if at all, did this encourage you to...? (Check your current tariff / Compare your current tariff against other tariffs from your supplier or another supplier / Switch your tariff and/or supplier)</td>
</tr>
<tr>
<td>Q.171</td>
<td>Energy suppliers are now required to provide a Tariff Comparison Rate (TCR) for each tariff they offer. This is an indicative price per unit of energy, taking into account all the charges and discounts. Prior to this interview, have you seen a TCR?</td>
</tr>
<tr>
<td>Q.172</td>
<td>And where did you see this?</td>
</tr>
<tr>
<td>Q.173</td>
<td>And to what extent, if at all, did this encourage you to...? (Check your current tariff / Compare your current tariff against other tariffs from your supplier or another supplier / Switch your tariff and/or supplier)</td>
</tr>
<tr>
<td>Q.176</td>
<td>(Personal projection plan) And to what extent, if at all, did this encourage you to...? (Check your current tariff / Compare your current tariff against other tariffs from your supplier or another supplier / Switch your tariff and/or supplier)</td>
</tr>
<tr>
<td>Q.127</td>
<td>Could you tell me the extent to which you agree or disagree with the following statements? (Financially things are a bit of a struggle for me / I always like to look for ways that I can save money, even if it is only a little / I often make a decision on impulse / Everything seems to be getting more complicated these days / I always check bank or building society statements when I get them, including online)</td>
</tr>
</tbody>
</table>
5.2 2017 full questionnaire

OFGEM CONSUMER SURVEY
FINAL Questionnaire
272.209.30306
March 2017

Base: F0: All respondents

INTRO1

READ OUT
I would now like to ask you some questions about gas and electricity suppliers on behalf of Ofgem, the independent energy regulator for Great Britain.
To start with, a few questions to make sure we are speaking with the right people

Base: F0: All respondents

Q1
SINGLE CODE

SHOW SCREEN
Do you have mains gas and/or mains electricity in your home?

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

Base: F1: Has gas and/or electricity supply

Q2
SINGLE CODE

Are you responsible or jointly responsible for the gas and/or electricity bills in your household?
INTERVIEWER INSTRUCTION: For those who rent properties where the landlord organises and pays the energy bills, code as 'No'

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

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

Intro2

READ OUT
Before we start to speak about energy, I would like to ask a few questions about you.
The first few questions are about whether and how you like to shop around for major service providers or for major purchases - not just for energy.

Base: F2: Has gas and/or electricity supply and responsible for it
SHOW SCREEN
To what extent do you agree or disagree with these things?

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

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

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

Intro3

READ OUT
Now some questions specifically about energy suppliers

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

Q150
SINGLE CODE

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

1: Yes
2: No
98: Refused
99: Don't know
**Q3**

**SINGLE CODE**

**SHOW SCREEN**

Who is your current gas supplier?

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

| British Gas | Gnergy                  |
| E.ON       | Good Energy            |
| EDF        | Green Energy           |
| Npower     | Green Network Energy Limited |
| SSE        | Green Star Energy      |
| Scottish Power | Iresa                |
| Affect Energy | iSupply Energy      |
| Avro Energy      | LOCO2                  |
| Axis Telecom     | M&S Energy            |
| Better Energy    | Octopus Energy Limited |
| Breeze        | Our Power Energy Supply Ltd |
| Bristol Energy & Technology Service | Ovo               |
| Bulb energy   | Places for People Energy |
| Cardiff Energy Supply | Pozitive Energy |
| Co-operative Energy Limited | Robin Hood Energy Limited |
| Daligas       | Sainsbury's Energy    |
| E (Gas and Electricity) Limited | So Energy |
| Economy Energy | Spark Energy          |
| Ecotricity    | Tonik                  |
| Effortless Energy | Toto Energy Limited |
| Engie         | UK NATIONAL GAS LTD   |
| Entice Energy Supply Limited | Utilita               |
| Eversmart     | Utility Warehouse     |
| Extra Energy Supply Limited | Zog Energy             |
| First Utility  | Other - PEN WRITE IN  |
| Flow Energy    | Refused                |
| Future Energy (Supply) | Don't know          |
### Q151

**SHOW SCREEN**

Who is your current gas and electricity supplier?

<table>
<thead>
<tr>
<th>Gas and Electricity Supplier</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>British Gas</td>
<td></td>
</tr>
<tr>
<td>E.ON</td>
<td></td>
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<td>Breeze</td>
<td></td>
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<tr>
<td>Cardiff Energy Supply</td>
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<td>First Utility</td>
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<tr>
<td>Flow Energy</td>
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</tr>
<tr>
<td>Future Energy (Supply)</td>
<td></td>
</tr>
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<td>Utility Warehouse</td>
<td></td>
</tr>
<tr>
<td>Zog Energy</td>
<td></td>
</tr>
<tr>
<td>Other - PEN WRITE IN</td>
<td></td>
</tr>
</tbody>
</table>

Refused
Don't know
Q5
SINGLE CODE

SHOW SCREEN
How do you pay for your gas?
INTERVIEWER: IF PAYMENT BOOK/CARD, CHECK "Are you certain that is a payment card/book or is it a prepayment meter?"

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

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

Q6
SINGLE CODE

SHOW SCREEN
How do you pay for your electricity?
INTERVIEWER INSTRUCTION: Check if on dual fuel deal
INTERVIEWER: IF PREPAYMENT, CHECK “Are you certain that is a payment card/book or is it a prepayment meter?”

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

Base: F4: Has electricity only supply and responsible for it / F5: Has gas and electricity supply and responsible for it
Base: F101 have gas and electricity from same supplier and pay for them both in the same way (e.g. direct debit, on receipt of bill only)

PayTy
SINGLE CODE
TEXT SUBSTITUTION: NOTE THERE ARE TWO IN THE QUESTION
If codes 1 or 2 at Q5& Q6 <pay a single direct debit … do two direct debits come out of your account>
If code 3 at Q5&Q6 <receive a single bill …. are they billed separately>

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

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

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

Q8
CAPTURE NUMERIC AMOUNT
ALLOW DK AND REFUSED OPTIONS
MIN £1; MAX £3000

SHOW SCREEN
Approximately how much do you spend on home energy? That is electricity and mains gas if you have it.
You can answer per year, per month or per week, but this should be on average across the whole year, including the winter.
If you're not sure, you can just give me an approximate value.
INTERVIEWER INSTRUCTION: The next question will ask you to record the timescale (i.e. per year, month or week) and whether this is the actual amount or an approximation.

Enter number

Base: F42: All who spend something on home energy

Q9
SINGLE CODE

Interviewer code, was that…

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

Base: F42: All who spend something on home energy

Apprx
SINGLE CODE

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

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

Base: F2: Has gas and/or electricity supply and responsible for it
TEXT SUBSTITUTION
Display energy type <gas / electricity / gas and electricity> based on following:
gas = F3
electricity = F4
gas and electricity = F5

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

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

Q153
SHOW SCREEN
Q.153 How familiar would you say you are with the features of your current energy tariff? I mean the rate you pay and any discounts, any standing charges that apply, exit fees or benefits that you receive.

1: Completely
2: Fairly
3: Not very
4: Not at all
98: Refused
99: Don't know

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

Q89
SHOW SCREEN
How familiar would you say you are with the features of your current gas tariff? I mean the rate you pay and any discounts, any standing charges that apply, exit fees or benefits that you receive.

1: Completely
2: Fairly
3: Not very
4: Not at all
98: Refused
99: Don't know

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

Q90
SHOW SCREEN
How familiar would you say you are with the features of your current electricity tariff? I mean the rate you pay and any discounts, any standing charges that apply, exit fees or benefits that you receive.

1: Completely
2: Fairly
Q10
SINGLE CODE
TEXT SUBSTITUTION
Display energy type <gas / electricity / gas and electricity> based on following:
- gas = F3
- electricity = F4
- gas and electricity = F5
Display response codes based on following:
1. Yes, gas only = F3 or F5
2. Yes, electricity only = F4 or F5
3. Yes gas and electricity = F5

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

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

Q11
SINGLE CODE
TEXT SUBSTITUTION
Display energy type in question wording from <gas / electricity / gas and electricity> based on following:
- gas = F3
- electricity = F4
- gas and electricity = F5
Display response codes based on following:
1. Yes, gas only = F3 or F5
2. Yes, electricity only = F4 or F5
3. Yes gas and electricity = F5

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

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

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

Q13
SHOW SCREEN
Do you pay different amounts for your energy depending on when you use it. For example, energy costs you less at night-time or you get free energy at the weekend?

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

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

Intro5

READ OUT
Now a few questions about smart meters.

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

SM1
SINGLE CODE
Smart meters monitor energy consumption in the home. Before today had you heard of smart meters?

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

Base: F111 Aware of smart meters

SM2
SINGLE CODE
ALTERNATE ORDER OF ANSWER LIST
SHOW SCREEN
Which of the statements below do you think most accurately describes who can install a smart meter?

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

Base: F111 Aware of smart meters

SM3
MULTIPLE CODE
ALTERNATE ORDER OF ANSWER LIST
SHOW SCREEN
And which, if any, of the following statements about smart meters do you believe to be true? You can select more than one statement'
1) Smart meters allow you to see in pounds and pence the amount of energy you are using in real time
2) A smart meter in your home means you will receive accurate bills rather than estimated ones from your energy supplier
96: None of these
98: Refused
99: Don't know

Base: F111 Aware of smart meters

SM4
SINGLE CODE

Do you have a smart meter?

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

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

SM6
SHOW AS GRID SINGLE CODE PER STATEMENT

SHOW SCREEN
As a result of getting a smart meter, to what extent do you do the following things? Please only think about what you've done since you've received a smart meter, compared to what you did before you had a smart meter.
Since receiving a smart meter, to what extent...
1. Do you use less energy
2. Do you use certain appliances or devices less often
3. Have you stopped using certain appliances or devices
4. Do you turn off the lights more
5. Do you keep the thermostat at a lower temperature

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

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

Intro6

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

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

Q14
MULTIPLE CODE
ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN
Which of the following do you think it is possible for energy customers to do?
INTERVIEWER INSTRUCTION: Multiple code as many as apply

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

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

**Q21**

**SINGLE CODE**

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

1: Once
2: Twice
3: Three times
4: Four times or more
5: Don't know how many times, but I definitely have switched gas supplier before
6: Have never switched gas supplier
98: Refused
99: Don't know
Q138
SHOW SCREEN
When did you last switch gas supplier?

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

Q22
SHOW SCREEN
How many times, if at all, have you ever switched your electricity supplier?

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

Q139
SHOW SCREEN
When did you last switch electricity supplier?

1. In the last 12 months
2. Between 1 and 2 years ago
3. Between 2 and 3 years ago
4. Between 3 and 4 years ago
5. Between 4 and 5 years ago
6. Between 5 and 9 years ago
7. 10 or more years ago
98 Refused
99 Don’t know
Base: F114 Switched gas and electricity supplier in past 12 months

Q154
SINGLE CODE

SHOW SCREEN
Thinking about the last time you switched an energy supplier, which of these did you do?
The last time I switched, I switched…
1: ... gas supplier only
2: ... electricity supplier only
3: ... gas and electricity suppliers at the same time
98: Refused
99: Don't know

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

TmesG
SINGLE CODE

SHOW SCREEN
How many times if at all, have you ever switched your gas tariff?
By this we mean, staying with the same gas supplier, but changing your deal e.g. moving from the supplier's variable rate to a fixed rate?
Please don't think here about times when you have switched supplier, but just about when you switched tariff
1: Once
2: Twice
3: Three times
4: Four times or more
5: Don't know how many times, but I definitely have switched gas tariff before
6: Have never switched gas tariff
98: Refused
99: Don't know

Base: F115 Ever switched gas tariff

WhnSG
SINGLE CODE

SHOW SCREEN
When did you last switch gas tariff?
1. In the last 12 months
2. Between 1 and 2 years ago
3. Between 2 and 3 years ago
4. Between 3 and 4 years ago
5. Between 4 and 5 years ago
6. Between 5 and 9 years ago
7. 10 or more years ago
98 Refused
99 Don't know
### F2: Has gas and/or electricity supply and responsible for it

**Base:** F2

**TimesE**

**SINGLE CODE**

**SHOW SCREEN**

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

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

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

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

### F116 Ever switched electricity tariff

**Base:** F116

**WhnSE**

**SINGLE CODE**

**SHOW SCREEN**

When did you last switch electricity tariff?

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

### F117 Switched gas and electricity tariff in past 12 months

**Base:** F117

**Switch**

**SINGLE CODE**

**SHOW SCREEN**

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

The last time I switched, I switched…

1: … gas tariff only  
2: … electricity tariff only  
3: … gas and electricity tariffs at the same time  
98: Refused  
99: Don’t know
ChngG

MULTIPLE CODE

ALTERNATE ORDER OF ANSWER LIST

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

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

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

ChngE

MULTIPLE CODE

ALTERNATE ORDER OF ANSWER LIST

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

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

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

Dummset

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

SET PRIORITY OF WHICH RECENT EXPERIENCE TO ASK ABOUT
IF MULTIPLE CODED, PRIORITY IS:
A SWITCHED SUPPLIER (1 OR 2 OR 3)
B SWITCHED TARIFF (4 OR 5 OR 6)
C COMPARED (7 OR 8 OR 9 OR 10)
IF MULTIPLE CODE WITHIN SELECTED CATEGORY, CHOOSE ONE WITHIN THAT CATEGORY AT RANDOM
Set selected variable as Dumm1

QUESTION NOT TO BE ASKED
PAST 12 MONTHS:
1: switched gas supplier
2: switched electricity supplier
3: switched gas and electricity suppliers together
4: switched gas tariff
5: switched electricity tariff
6: switched gas and electricity tariff together
7: compared gas suppliers
8: compared gas tariffs offered by your own supplier
9: compared electricity suppliers
10: compared electricity tariffs offered by your own supplier
96: None of these

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

Intro6b

TURN SCREEN AWAY FROM RESPONDENT UNTIL TOLD OTHERWISE

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

Intro7A

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

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

Q160
MULTIPLE CODE
MAX 3 ANSWERS
SUBSTITUTE IN FROM DUMM1

DO NOT PROMPT
Thinking of the last time you <answer from Dumm1>, what were your priorities?
IF 'Saving money' PROBE TO PRECODES
PROBE: What other things were your priorities?
CODE UP TO 3 RESPONSES

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

Base: F119 Gave more than one response at Q160

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

DO NOT PROMPT
And which of these was your main priority the last time you <answer from Dumm1>?
Was it...
READ OUT

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

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

Q161
MULTIPLE CODE
MAX 3 ANSWERS
RECORD ORDER
SUBSTITUTE IN FROM DUMM1

DO NOT PROMPT
And thinking about the last time you <answer from Dumm1>, what were the main reasons that caused you to do that?
IF NECESSARY: Was it something that happened that made you start to think about it, or was there something that you saw or heard or read?
INTERVIEWER INSTRUCTION: Multiple code up to 3 responses

1 I received a bill or direct debit \ prepayment statement from my supplier
2 I received a price increase notice from my supplier
3 I received an end of fixed term tariff notice from my supplier
4 I received an annual summary or review from my supplier
5 I received information about my energy consumption from my supplier
5 I received a 'dead notice' from my supplier about my tariff
6 I saw a message on a communication from my supplier about how I could make savings by changing tariff or payment method with my current supplier
7 I received another communication from my supplier
8. I received a communication from another supplier
9 I experienced poor customer service
10 I moved home
11 I heard my energy supplier’s prices were going up
12 Media coverage about energy suppliers in general
13 I was looking at a money saving website
14 I saw a TV advert/programme
15 I heard a radio advert/programme
16 I saw an ad/article in a newspaper/magazine
17 I saw someone post something on social media (Facebook, Instagram, Twitter, etc.)
18 I saw an advert/article online
19 Other advertising
20 Talked to a friend, family member, or neighbour
97: Other - please type in
98 Refused
99 Don't know

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

Q165
MULTIPLE CODE
SUBSTITUTE IN FROM DUMM1

DO NOT PROMPT
And when you last <answer from Dumm1>, how did you find out about the deals offered?
INTERVIEWER INSTRUCTION: Multiple code as many as apply

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

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

Deals
SINGLE CODE

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

1. One
2. Two
3. Three or more
99. Don't know
98. Refused
Are there any particular reasons why you have not <shopped around to see if there are any better energy deals /switched tariff or switched supplier>? CHOOSE ALL THAT APPLY. CODE FIRST MENTION THEN OTHER MENTIONS INTERVIEWER: IF RESPONDENT SAYS “HAPPY WITH/LIKE CURRENT SUPPLIER” THEN PROBE WHAT DO YOU LIKE ABOUT YOUR EXISTING SUPPLIER?

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

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

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

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

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

General
20. Not interested
21. Too complicated
22. All suppliers are much the same/no difference
23. Too much hassle/effort
24. Wasn’t aware you could switch/change
25. Don’t know how to do it
96. Nothing specific
97. Other (specify)
99. Don’t know
98. Prefer not to say
Apart from salespeople working for energy companies, has anyone made any of these recommendations to you in the last 12 months? This could be a friend, family member, someone you know on social media, or an other organisation.

1. Recommended that I switch supplier
2. Recommended a particular energy supplier/deal
3. Warned me away from a particular energy supplier/deal
96: None
98: Refused
99: Don't know

Base: 120 Recommendations made at Recom Intro7A

TURN SCREEN AWAY FROM RESPONDENT UNTIL TOLD OTHERWISE
**Base:** f120 Recommendations made at Recom

**Whoma**

**MULTIPLE CODE**

**DO NOT PROMPT**
Who made those recommendations?

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

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

**Intro8**

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

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

**Intro9**

**READ OUT AND SHOW SCREEN**
The next question is about different types of tariffs.
With a Fixed Tariff, your contract has a definite end date, after which you will usually be rolled onto your supplier’s variable or standard rate.
With a Variable Tariff (also sometimes called a standard tariff) your contract doesn’t have a fixed end date. You will stay on this tariff unless you make a choice to change it.

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

**SwiTa**

**SINGLE CODE**

**ALTERNATE ORDER OF ANSWER LIST**

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

1. Switched from a variable tariff to a fixed term tariff
2. Switched from a variable tariff to another variable tariff
3. Switched from a fixed term tariff to a variable tariff
4. Switched from a fixed term tariff to another fixed term tariff
99. Don’t know
98. Refused
Base: F123 Switched gas or electricity supplier or tariff in past 12 months

Intro9A

TURN SCREEN AWAY FROM RESPONDENT UNTIL TOLD OTHERWISE

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

Q156

DO NOT PROMPT
Thinking of the last time you <answer from Dumm1> how did you switch?
INTERVIEWER INSTRUCTION: PROBE TO PRECODES
EVEN IF THE RESPONDENT SOUGHT INFORMATION IN DIFFERENT WAYS, WE ARE
INTERESTED IN THE WAY THEY ACTUALLY MADE THE SWITCH

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

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

PCWSw

SINGLE CODE

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

1. Completed switch through price comparison service
2. Completed switch in some other way
99. Don't know
98. Refused
Did anyone who doesn’t live with you go through or help you through the switching process on your behalf? If so, who?

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

Thinking of the last time you <answer from Dumm1>, how much do you agree or disagree with the statement?
“I found it easy to decide which deal to switch to”

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

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

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

MoreP
CAPTURE NUMERIC AMOUNT
ALLOW DK AND REFUSED RESPONSES
MIN £1; MAX £3000
If Dumm1=1 or 4 = gas
If Dumm1= 2 or 5 = electricity
If Dumm1= 3 or 6 = energy

SHOW SCREEN
If you hadn’t <INSERT answer from Dumm1> how much more do you think you would be paying now for your <gas/electricity/energy>?
You can answer per year, per month or per week, but this should be on average across the whole year, including the winter.
If you’re not sure, you can just give me an approximate value.
INTERVIEWER INSTRUCTION: The next question will ask you to record the timescale (i.e. per year, month or week) and whether this is the actual amount or an approximation.

ENTER NUMBER

Base: F125 Thought they would save money from the switch

Frequ
SINGLE CODE

Interviewer code, is that…

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

Base: F125 Thought they would save money from the switch

Apprx2
SINGLE CODE

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

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

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

OwedM
SINGLE CODE

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

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

Base: F126 Owed balance from old supplier when last switched

MonRe
SINGLE CODE

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

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

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

Intro9B

TURN SCREEN AWAY FROM RESPONDENT UNTIL TOLD OTHERWISE

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

Q122
MULTIPLE CODE
MAX 3 ANSWERS

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

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

Base: F121 Gave more than one response at Q122

PrioM
SINGLE CODE
SHOW ONLY ANSWERS GIVEN AT Q122

And which of these would be your main priority?
Would it be…
READ OUT

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

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

Q123
SINGLE CODE
ALTERNATE ORDER OF ANSWER LIST
SHOW SCREEN
Thinking of the factors that matter most to you, how confident are you that you are currently on the best gas deal for you?
1: Very confident
2: Fairly confident
3: Neutral
4: Not very confident
5: Not confident at all
98: Refused
99: Don't know

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

Q124
SINGLE CODE
ALTERNATE ORDER OF ANSWER LIST
SHOW SCREEN
Thinking of the factors that matter most to you, how confident are you that you are currently on the best electricity deal for you?
1: Very confident
2: Fairly confident
3: Neutral
4: Not very confident
5: Not confident at all
98: Refused
99: Don't know

Base: F7: Has gas and electricity supply from the same supplier and responsible for it
Q125
SINGLE CODE
ALTERNATE ORDER OF ANSWER LIST

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

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

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

Tried
SINGLE CODE

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

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

Base: F106 Tried to switch but unable to

Descr
MULTIPLE CODE
RANDOMISE

SHOW SCREEN
Which, if any of these describe what happened?

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

Base: F2: Has gas and/or electricity supply and responsible for it
The next few questions are about your views on comparing and switching energy supplier more generally.

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

**Q73**
SINGLE CODE
ALTERNATE ORDER OF ANSWER LIST
SHOW SCREEN
Thinking about the range of different tariffs available to you from energy suppliers, would you say that you have…?

1: Too much choice
2: About the right amount of choice
3: Too little choice
98: Refused
99: Don't know

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

**Q145**
SINGLE CODE
ALTERNATE ORDER OF ANSWER LIST
SHOW SCREEN
How easy or difficult do you believe it is to compare different tariffs for electricity or gas?

1: Very easy
2: Fairly easy
3: Neither easy nor difficult
4: Fairly difficult
5: Very difficult
98: Refused
99: Don't know

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

**PCWS1:**
SINGLE CODE PER STATEMENT
RANDOMISE STATEMENTS
To what extent do you agree or disagree with these things about price comparison websites?

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

1: Agree strongly
2: Tend to agree
3: Neither agree nor disagree
4: Tend to disagree
5: Disagree strongly
98: Refused
99: Don't know
SHOW SCREEN
To what extent do you agree or disagree with the following statements about energy suppliers?

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

SHOW SCREEN
How much do you agree or disagree...?

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

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

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

Intro3d

TURN SCREEN AWAY FROM RESPONDENT UNTIL TOLD OTHERWISE

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

Risks
MULTIPLE CODE
RANDOMISE
RECORD OTHER

DO NOT PROMPT
What, if anything, do you think might be the risks associated with switching energy suppliers?
CODE ALL MENTIONED: PROBE: What other risks can you think of?

1. Something might go wrong and they might get cut off
2. New supplier might not accept them (e.g. because they don’t use much energy, they have a poor credit rating)
3. New supplier might not accept people who have a prepayment meter
4. New supplier needs to change cables/pipes
5. New supplier needs to change meter(s)
6. Might lose functionality of smart meter/have to go back to doing meter readings
7. Might not save as much as they thought
8. Costs might go up
9. Supplier they switch to might go bust
10. Double/shock billing (might be billed by both suppliers)
97. Other risk (specify)
96. No risks
99. Don't know
If someone was to switch to a new energy supplier, how long do you think the process takes from the time that they ask to switch, to the time that the new supplier starts to supply their energy? You can answer in days or weeks

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

**Base:** F2: Has gas and/or electricity supply and responsible for it
4: Tend to distrust 
5: Strongly distrust 
98: Refused 
99: Don't know 

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

Q64 
SINGLE CODE FOR EACH QUESTION 
RANDOMISE 
SHOW SCREEN AND READ OUT STATEMENT 
Now thinking about your electricity supplier… To what extent do you trust or distrust your electricity supplier to...? 
  i) Treat you fairly in their dealings with you 
  ii) Provide clear and helpful information for you 
  iii) Charge you a fair price for your electricity 

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

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

Q68 
SINGLE CODE FOR EACH QUESTION 
RANDOMISE 
SHOW SCREEN AND READ OUT STATEMENT 
To what extent do you trust or distrust your energy supplier to...? 
  i) Treat you fairly in their dealings with you 
  ii) Provide clear and helpful information for you 
  iii) Charge you a fair price for your gas and electricity 

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

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

SpAtt 
SINGLE CODE FOR EACH QUESTION 
RANDOMISE 
SHOW SCREEN 
To what extent do you agree or disagree with these statements about energy suppliers 
  ii. I would be wary of using an energy supplier I have never heard of 
  iii. If I was going to change energy supplier, I would look for a supplier who offered me extra rewards 
  iv. I would be happy to pay slightly more for my energy if my supplier offered me better customer service 

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

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

Q59
SINGLE CODE
ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN
How satisfied or dissatisfied are you with the overall service you receive from your current gas supplier?

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

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

Q63
SINGLE CODE
ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN
How satisfied or dissatisfied are you with the overall service you receive from your current electricity supplier?

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

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

Q67
SINGLE CODE
ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN
How satisfied or dissatisfied are you with the overall service you receive from your current energy supplier?

1: Very satisfied
2: Satisfied
3: Neither satisfied nor dissatisfied
4: Dissatisfied
5: Very dissatisfied
98: Refused
99: Don't know
SHOW SCREEN
How do you rate your current gas supplier in terms of value for money?

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

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

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

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

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

Now thinking about complaints
Q76
SINGLE CODE

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

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

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

Q81
SINGLE CODE

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

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

Base: F127 Cause to complain but did not complain

NotCm
MULTIPLE CODE

SHOW SCREEN
Why did you not make a complaint at that time?

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

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

Intro8b

Now thinking about contact with energy suppliers more generally

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

Q82
MULTIPLE CODE

SHOW SCREEN - MULTIPLE CHOICE
Excluding complaints and giving routine meter readings, have you had any interaction with your own or another energy supplier in the last 12 months?

1: Yes - I contacted my current or previous energy supplier
2: Yes - I contacted another energy supplier
3: Yes - my current or previous energy supplier contacted me
4: Yes - another energy supplier contacted me
5: No
98: Refused
99: Don't know

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

**INTRO9**

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

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

**Repre**

**MULTIPLE CODE**

**SHOW SCREEN**

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

CODE ALL THAT APPLY

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

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

**Words**

**MULTIPLE CODE**

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

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

TEXT SUBSTITUTION BASED ON REPRE, AS FOLLOWS:

GENERIC INTRO Thinking about the last time...

THEN SPECIFIC WORDING DEPENDING ON ANSWER AT REPRE

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

GENERIC ENDING

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

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

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

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

**Q94**

**SINGLE CODE FOR EACH STATEMENT**

**DISLAY INTERVIEWER INSTRUCTION AT iii) ONLY**

**SHOW SCREEN**

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

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

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

1: Yes
2: No
98: Refused
99: Don’t know

**Base:** F47: Received annual summary

**Q95**

**SINGLE CODE**

**SHOW SCREEN**

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

1: Read it in detail
2: Glanced over it or skim read it
3: Only saw what it was, but did not read it
98: Refused
99: Don’t know

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

**Q96**

**SINGLE CODE**

**ALTERNATE ORDER OF ANSWER LIST**

**SHOW SCREEN**
And how clearly or unclearly do you think the information was presented to you in the annual summary?

1: Very clearly
2: Quite clearly
3: Neither clearly nor unclearly
4: Quite unclearly
5: Very unclearly
98: Refused
99: Don't know

**Base:** F48: Received bill

**Q99**

**SINGLE CODE**

**SHOW SCREEN**
Thinking about when you last received a bill or direct debit/prepayment statement, in how much detail did you look at it?

1: Read it in detail
2: Glanced over it or skim read it
3: Only saw what it was, but did not read it
98: Refused
99: Don't know

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

**Q100**

**SINGLE CODE**

**ALTERNATE ORDER OF ANSWER LIST**

**SHOW SCREEN**
And how clearly or unclearly do you think the information was presented to you in the bill or direct debit/prepayment statement?

1: Very clearly
2: Quite clearly
3: Neither clearly nor unclearly
4: Quite unclearly
5: Very unclearly
98: Refused
99: Don't know

**Base:** F49: Received PIN

**Q103**

**SINGLE CODE**

**SHOW SCREEN**
Thinking about when you last received a price increase notice, in how much detail did you look at it?

1: Read it in detail
2: Glanced over it or skim read it
3: Only saw what it was, but did not read it
98: Refused
99: Don't know

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

**Q104**

**SINGLE CODE**
SHOW SCREEN
And how clearly or unclearly do you think the information was presented to you in the price increase notice?

1: Very clearly
2: Quite clearly
3: Neither clearly nor unclearly
4: Quite unclearly
5: Very unclearly
98: Refused
99: Don't know

Base: F50: Received end of fixed term letter

Q107
SINGLE CODE

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

1: Read it in detail
2: Glanced over it or skim read it
3: Only saw what it was, but did not read it
98: Refused
99: Don’t know

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

Q108
SINGLE CODE

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

1: Very clearly
2: Quite clearly
3: Neither clearly nor unclearly
4: Quite unclearly
5: Very unclearly
98: Refused
99: Don’t know

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

Q174
SINGLE CODE

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

1. Yes
2. No
98. Refused
99. Don’t know
PLEASE TURN SCREEN AWAY FROM RESPONDENT

Q175
MULTIPLE CODE
Q.175 And where did you see this?
INTERVIEWER INSTRUCTION: if respondent answers 5, 8, or 9, probe if this was actually either 1, 2, 3, or 4

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

Q120
MULTIPLE CODE  SHOW AS GRID
ROTATE ORDER OF PRESENTATION OF ROWS
SHOW SCREEN
For which, if any, of the following services have you switched your provider in the last 12 months?
For each of :
 i: Mobile phone network
 ii: Internet or broadband provider
 iii: Current Account
 iv. Home insurance
 v. Car insurance
 1. Yes I've switched
 2. No I haven't
 3. Not applicable because I don't have this product
 98. DK
 99. Refused
Q128
SINGLE CODE
SHOW SCREEN
How often do you use the internet?
1: Roughly every day
2: At least once a week
3: At least once a month
4: Less than once per month
5: Never - but I do have access
6: Never - and I do not have access
98: Refused
99: Don't know

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

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

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

Q129
SINGLE CODE
SHOW SCREEN
Can I check, is English your first or main language?
INTERVIEWER INSTRUCTION: If "Yes", probe - "Is English the only language you speak or do you speak any other language?"
1: Yes - English only
2: Yes - English first/main and speaks other languages
3: No - Another first/main language
4: Bilingual - consider both languages as main
98: Refused
99: Don't know

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

Q130
SINGLE CODE
SHOW SCREEN
What is the highest level of education you have completed? Please select one answer only.
3: Professional qualifications
1: Post graduate degree (MA, MSc, PhD etc.)
2: Degree
4: HND/HNC
7: ONC/OND/City & Guilds
8: GNVQ
5: A Levels\AS Levels
6: GCSE\O Levels\CSE
96: None
98: Refused
99: Don't know
Q131
MULTIPLE CODE

Do you or your husband\wife\partner have any long-term illness, physical or mental health problem or disability which limits your daily activities or the work you can do? This includes problems due to old age.
INTERVIEWER INSTRUCTION: Multiple code as many as apply

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

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

Disa2
ASK FOR EACH PERSON IDENTIFIED AT Q131
MULTIPLE CODE

SHOW SCREEN
If code 1 at Q131:
Which of these best describes your impairment, illness or disability?
If code 2 at Q131
Which of these best describes your spouse/ civil partner/ partner's impairment, illness or disability?
PLEASE SELECT ALL THAT APPLY

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

Q132
SINGLE CODE

And do you or your husband\wife\partner have any caring responsibilities for a member of your immediate family, or, a close relative outside of your household who has any long-standing illness, physical or mental health problem or disability? This includes caring for relatives with problems due to old age.

1: Yes
2: No
98: Refused
99: Don't know
SHOW INCOME CARD
This card shows incomes in weekly, monthly and annual amounts. Which of the groups on the card represents your personal or your husband’s/wife’s/partner’s combined income before any deductions such as income tax or National Insurance? Please include income from earnings, self-employment, benefits, pensions, and interest from savings. Just tell me the letter beside the row that applies to you.

G: Under £100 \ Under £400 \ Under £5,000
B: £100 - £199 \ £400 - £829 \ £5,000 - £9,999
F: £200 - £308 \ £830 - £1,333 \ £10,000 - £15,999
I: £309 - £389 \ £1,334 - £1,649 \ £16,000 - £19,999
D: £390 - £489 \ £1,650 - £2,099 \ £20,000 - £24,999
C: £490 - £579 \ £2,100 - £2,899 \ £25,000 - £34,999
A: £580 - £869 \ £2,900 - £3,749 \ £35,000 - £44,999
J: £870 - £1,149 \ £3,750 - £4,999 \ £45,000 - £59,999
H: £1,150 - £1,549 \ £5,000 - £6,649 \ £60,000 - £79,999
E: £1,550 or over \ £6,650 or over \ £80,000 or over
SPONTANEOUS ONLY: Nothing/no work or scheme
98: Refused
99: Don’t know

Can I just check, is your own or your own and your partner’s total income, before tax and any other deductions more or less than £16,000 per year?
INTERVIEWER INSTRUCTION: If the respondent has a partner we would like their combined income.

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

SHOW SCREEN
Which one of the following statements best describes how well you are keeping up with your bills and credit commitments at the moment? Please include those you have personally or jointly with a partner or spouse
PLEASE SELECT ONE ONLY

1. I am / we are keeping up with all bills and commitments without any difficulties
2. I am / we are keeping up with all bills and commitments, but it is a struggle from time to time
3. I am / we are keeping up with all bills and commitments, but it is a constant struggle
4. I am / we are falling behind with some bills or credit commitments
5. I am / we are having real financial problems and have fallen behind with many bills or credit commitments
6. I / we don’t have any bills or credit commitments
99. Don’t know
98. Refused
Base: **F2: Has gas and/or electricity supply and responsible for it**

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<th>Area</th>
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<tbody>
<tr>
<td><strong>SINGLE CODE</strong></td>
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**SHOWSCREEN**
In the last twelve months, has the household been in arrears on your gas or electricity bills. That means that you have been unable to pay on time because of financial difficulties.

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

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

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<th>Q135</th>
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Have you moved house in the last 12 months?

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

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

<table>
<thead>
<tr>
<th>Proper</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>MULTIPLE CODE</strong></td>
</tr>
</tbody>
</table>

**SHOW SCREEN**
Which, if any, of these do you have at this property?
CODE ALL THAT APPLY

1. Solar panels to generate electricity
2. Solar water heating
3. Wind turbine
4. Micro-hydropower system
5. Micro CHP boiler (boiler that also generates electricity)
97. Other (specify)
96. None of these
99. Don’t know
98. Refused
**Base: F2: Has gas and/or electricity supply and responsible for it**

### Age

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

What is your age?

<table>
<thead>
<tr>
<th>Age Band</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. 16-24</td>
<td></td>
</tr>
<tr>
<td>2. 25-34</td>
<td></td>
</tr>
<tr>
<td>3. 35-44</td>
<td></td>
</tr>
<tr>
<td>4. 45-54</td>
<td></td>
</tr>
<tr>
<td>5. 55-64</td>
<td></td>
</tr>
<tr>
<td>6. 65-74</td>
<td></td>
</tr>
<tr>
<td>7. 75-84</td>
<td></td>
</tr>
<tr>
<td>8. 85+</td>
<td></td>
</tr>
<tr>
<td>9. Prefer not to say</td>
<td></td>
</tr>
</tbody>
</table>

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

### Gender

DO NOT ROTATE

What is your gender?

<table>
<thead>
<tr>
<th>Gender</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Male</td>
<td></td>
</tr>
<tr>
<td>2. Female</td>
<td></td>
</tr>
<tr>
<td>3. Other</td>
<td></td>
</tr>
<tr>
<td>4. Prefer not to say</td>
<td></td>
</tr>
</tbody>
</table>
Ethnicity

DO NOT ROTATE

Which of these groups do you consider you belong to?

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

Marital

DO NOT ROTATE

SHOWSCREEN

Which of these best applies to you personally?

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

Adults1

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

ENTER NUMBER

Adults2

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

ENTER NUMBER
Child1

Are there any CHILDREN UNDER 16 in the household?

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

Tenure

SHOW SCREEN AND READ OUT
Please tell me whether your home is...

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

Work

SHOWSCREEN
Are you...

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

Socialgrade

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

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

Are they/you ...
1. Working
2. Retired/Not working with private pensions/means
3. Unemployed less than 6 months
4. Unemployed more than 6 months
5. Retired with STATE BENEFIT/PENSION ONLY
6. Not working with STATE BENEFIT ONLY
7. Student

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

Job Title
Job Description
Industry
Number employed at location
Qualifications

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

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

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

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

Q136
SINGLE CODE

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

1: Yes
2: No

Base:

After

Take contact details – name, address, tel number and email address
### 5.3 Full list of filters used in 2017

<table>
<thead>
<tr>
<th>Filter No.</th>
<th>Description</th>
<th>Definition</th>
<th>Full filter description</th>
</tr>
</thead>
<tbody>
<tr>
<td>F0</td>
<td>All respondents</td>
<td>[All]</td>
<td>F0: All respondents</td>
</tr>
<tr>
<td>F1</td>
<td>Has gas and/or electricity supply</td>
<td>[Q1=1] OR [Q1=2] OR [Q1=3]</td>
<td>F1: Has gas and/or electricity supply</td>
</tr>
<tr>
<td>F2</td>
<td>Has gas and/or electricity supply and responsible for it</td>
<td>[Q2=1]</td>
<td>F2: Has gas and/or electricity supply and responsible for it</td>
</tr>
<tr>
<td>F3</td>
<td>Has gas only supply and responsible for it</td>
<td>[Q1=1 AND Q2=1]</td>
<td>F3: Has gas only supply and responsible for it</td>
</tr>
<tr>
<td>F4</td>
<td>Has electricity only supply and responsible for it</td>
<td>[Q1=2 AND Q2=1]</td>
<td>F4: Has electricity only supply and responsible for it</td>
</tr>
<tr>
<td>F5</td>
<td>Has gas and electricity supply and responsible for it</td>
<td>[Q1=3 AND Q2=1]</td>
<td>F5: Has gas and electricity supply and responsible for it</td>
</tr>
<tr>
<td>F6</td>
<td>Has different gas and electricity suppliers, or not sure if the same</td>
<td>[Q150=2] OR [Q150=98] OR [Q150=99]</td>
<td>F6: Has different gas and electricity suppliers, or not sure if the same</td>
</tr>
<tr>
<td>F7</td>
<td>Has gas and electricity supply from the same supplier and responsible for it</td>
<td>[Q150=1]</td>
<td>F7: Has gas and electricity supply from the same supplier and responsible for it</td>
</tr>
<tr>
<td>F42</td>
<td>All who spend something on home energy</td>
<td>[Q8 &gt;£0]</td>
<td>F42: All who spend something on home energy</td>
</tr>
<tr>
<td>F45</td>
<td>Not made complaint in past 12 months to current or previous supplier</td>
<td>[Q76=2] OR [Q76=98] OR [Q76=99]</td>
<td>F45: Not made complaint in past 12 months to current or previous supplier</td>
</tr>
<tr>
<td>F47</td>
<td>Received annual summary</td>
<td>[Q94ii=1]</td>
<td>F47: Received annual summary</td>
</tr>
<tr>
<td>F48</td>
<td>Received bill</td>
<td>[Q94iii=1]</td>
<td>F48: Received bill</td>
</tr>
<tr>
<td>F49</td>
<td>Received PIN</td>
<td>[Q94iv=1]</td>
<td>F49: Received PIN</td>
</tr>
<tr>
<td>F50</td>
<td>Received end of fixed term letter</td>
<td>[Q94v=1]</td>
<td>F50: Received end of fixed term letter</td>
</tr>
<tr>
<td>F51</td>
<td>Received annual summary AND read it in detail/skimmed</td>
<td>[[Q95=1 OR Q95=2] AND [F47]]</td>
<td>F51: Received annual summary AND read it in detail/skimmed</td>
</tr>
<tr>
<td>Filter No.</td>
<td>Description</td>
<td>Definition</td>
<td>Full filter description</td>
</tr>
<tr>
<td>-----------</td>
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<td>-------------------------</td>
</tr>
<tr>
<td>F52</td>
<td>Received bill AND read it in detail/skimmed</td>
<td>([Q99=1 \text{ OR } Q99=2] \text{ AND } [F48])</td>
<td>F52: Received bill AND read it in detail/skimmed</td>
</tr>
<tr>
<td>F53</td>
<td>Received PIN AND read it in detail/skimmed</td>
<td>([Q103=1 \text{ OR } Q103=2] \text{ AND } [F49])</td>
<td>F53: Received PIN AND read it in detail/skimmed</td>
</tr>
<tr>
<td>F54</td>
<td>Received end of fixed term letter AND read it in detail/skimmed</td>
<td>([Q107=1 \text{ OR } Q107=2] \text{ AND } [F50])</td>
<td>F54: Received end of fixed term letter AND read it in detail/skimmed</td>
</tr>
<tr>
<td>F55</td>
<td>&quot;Nothing'no work or scheme&quot; or don't know income or refused income</td>
<td>([Q133=1, 9, 98] \text{ OR } [Q133=99])</td>
<td>F55: &quot;Nothing'no work or scheme&quot; or don't know income or refused income</td>
</tr>
<tr>
<td>F101</td>
<td>Have gas and electricity from same supplier and pay for them both in the same way (e.g. direct debit, on receipt of bill only)</td>
<td>([F7] \text{ AND } {[Q5=1 \text{ AND } Q6=1] \text{ OR } [Q5=2 \text{ AND } Q6=2] \text{ OR } [Q5=3 \text{ AND } Q6=3]})</td>
<td>F101 have gas and electricity from same supplier and pay for them both in the same way (e.g. direct debit, on receipt of bill only) (codes 1 or 2 or 3 at Q.5 and Q.6)</td>
</tr>
<tr>
<td>F102</td>
<td>Switched using price comparison site</td>
<td>([Q165=1])</td>
<td>F102 Switched using price comparison site</td>
</tr>
<tr>
<td>F106</td>
<td>Tried to switch but unable to at New17</td>
<td>([\text{Tried = 1}])</td>
<td>F106 Tried to switch but unable to</td>
</tr>
<tr>
<td>F107</td>
<td>Approached by salesperson at Repre (marked with * in answer list)</td>
<td>([\text{Repre = 1}] \text{ OR } [\text{Repre = 2}] \text{ OR } [\text{Repre = 3}] \text{ OR } [\text{Repre = 4}] \text{ OR } [\text{Repre = 5}] \text{ OR } [\text{Repre = 6}])</td>
<td>F107 Approached by salesperson from own or other energy company</td>
</tr>
<tr>
<td>F108</td>
<td>Shopped around in energy market but not switched supplier or tariff in P12M, or not shopped around in energy market at all in P12M</td>
<td>([\text{Dummset&lt;&gt;1, 2, 3, 4, 5} \text{ or } 6])</td>
<td>F108 Shopped around in energy market but not switched supplier or tariff in P12M, or not shopped around in energy market at all in P12M</td>
</tr>
<tr>
<td>F109</td>
<td>Someone else in household with long term limiting illness/disability at Q131</td>
<td>(Q131=2)</td>
<td>F109 Someone else in household with long term limiting illness/disability at Q131</td>
</tr>
<tr>
<td>F110</td>
<td>Respondent or spouse / partner has long term limiting illness/disability (Q131)</td>
<td>(Q131=1 \text{ OR } 2)</td>
<td>F110 Respondent or spouse/partner with long term limiting illness/disability</td>
</tr>
<tr>
<td>Filter No.</td>
<td>Description</td>
<td>Definition</td>
<td>Full filter description</td>
</tr>
<tr>
<td>-----------</td>
<td>--------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------</td>
</tr>
<tr>
<td>F111</td>
<td>Aware of smart meters</td>
<td>[SM1 = 1]</td>
<td>F111 Aware of smart meters</td>
</tr>
<tr>
<td>F112</td>
<td>Ever switched gas supplier</td>
<td>[Q21 = 1] or [Q21 = 2] OR [Q21 = 3] OR [Q21 = 4] OR [Q21 = 5]</td>
<td>F112 Ever switched gas supplier</td>
</tr>
<tr>
<td>F113</td>
<td>Ever switched electricity supplier</td>
<td>[Q22 = 1] OR [Q22 = 2] or [Q22 = 3] OR [Q22 = 4] OR [Q22 = 5]</td>
<td>F113 Ever switched electricity supplier</td>
</tr>
<tr>
<td>F114</td>
<td>Switched gas and electricity supplier in past 12 months</td>
<td>Q138=1 and Q139 =1</td>
<td>F114 Switched gas and electricity supplier in past 12 months</td>
</tr>
<tr>
<td>F115</td>
<td>Ever switched gas tariff</td>
<td>[TmesG = 1] or [TmesG=2] or [TmesG=3] or [TmesG =4] or [TmesG =5]</td>
<td>F115 Ever switched gas tariff</td>
</tr>
<tr>
<td>F116</td>
<td>Ever switched electricity tariff</td>
<td>[TmesE = 1] or [TmesE=2] or [TmesE=3] or [TmesE =4] or [TmesE =5]</td>
<td>F116 Ever switched electricity tariff</td>
</tr>
<tr>
<td>F117</td>
<td>Switched gas and electricity tariff in past 12 months</td>
<td>WhnSG=1 and WhnSE =1</td>
<td>F117 Switched gas and electricity tariff in past 12 months</td>
</tr>
<tr>
<td>F118</td>
<td>Switched gas or electricity supplier or tariff, or compared suppliers or tariffs in the past 12 months</td>
<td>[Dummset=1] or [DummSet=2] or [DummSet=3] or [DummSet=4] or [DummSet=5] or [DummSet=6] or [DummSet=7] or [DummSet=8] or [DummSet=9] or [DummSet=10]</td>
<td>F118 Switched gas or electricity supplier or tariff, or compared suppliers or tariffs in the past 12 months</td>
</tr>
<tr>
<td>F119</td>
<td>Gave more than one response at Q160</td>
<td>Coded 2 or more codes at Q160</td>
<td>F119 Gave more than one response at Q160</td>
</tr>
<tr>
<td>F120</td>
<td>Recommendations made at Recom</td>
<td>[Recom = 1] or [Recom = 2] or [Recom = 3]</td>
<td>F120 Recommendations made at Recom</td>
</tr>
<tr>
<td>F121</td>
<td>Gave more than one response at Q122</td>
<td>Coded 2 or more codes at Q122</td>
<td>F121 Gave more than one response at Q122</td>
</tr>
<tr>
<td>F123</td>
<td>Switched gas or electricity supplier or</td>
<td>[DummSet=1] or [DummSet=2]</td>
<td>F123 Switched gas or electricity supplier or tariff in past 12</td>
</tr>
<tr>
<td>Filter No.</td>
<td>Description</td>
<td>Definition</td>
<td>Full filter description</td>
</tr>
<tr>
<td>-----------</td>
<td>------------------------------------------------------------------------------</td>
<td>-------------------------------------------------</td>
<td>-------------------------</td>
</tr>
<tr>
<td>F124</td>
<td>Switched gas or electricity supplier in past 12 months</td>
<td>[DummSet=1] or [DummSet=2] or [DummSet=3]</td>
<td></td>
</tr>
<tr>
<td>f125</td>
<td>Thought they would save money from the switch</td>
<td>Q166 = 1 or Q166 = 2</td>
<td>F125 Thought they would save money from the switch</td>
</tr>
<tr>
<td>F126</td>
<td>Owed balance from old supplier when last switched’</td>
<td>OwedM = 1</td>
<td>F126 Owed balance from old supplier when last switched</td>
</tr>
<tr>
<td>F127</td>
<td>Cause to complain but did not complain</td>
<td>q81 = 1</td>
<td>F127 Cause to complain but did not complain</td>
</tr>
<tr>
<td>F128</td>
<td>Have received information about your energy consumption or use in P12M at Q94</td>
<td>Q94 = 1</td>
<td>F128: Have received information about your energy consumption or use in P12M at Q94</td>
</tr>
<tr>
<td>F129</td>
<td>Says they have a smart meter</td>
<td>[SM4=1]</td>
<td>F129: Says they have a smart meter</td>
</tr>
<tr>
<td>F130</td>
<td>Aware of personal projection</td>
<td>Q174 = 1</td>
<td>F130: Aware of personal projection</td>
</tr>
<tr>
<td>f133</td>
<td>NOT Switched gas or electricity supplier or tariff, or compared suppliers or tariffs in the past 12 months</td>
<td>Dummset = 96</td>
<td>F133:NOT Switched gas or electricity supplier or tariff, or compared suppliers or tariffs in the past 12 months</td>
</tr>
</tbody>
</table>
5.4 Qualitative discussion guide

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

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

1. Introductions 5 mins

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

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

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

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

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

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

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

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

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

Talk me through how you went about this purchase …

Moderator probe as appropriate –

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

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

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

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

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

(If you were discussing renewing a service) what about major purchases? Try to think of an example.

(If you were discussing a major purchase (what about a service renewal? Try to think of an example

- How is this different? Why?
- Do you feel differently about this? Why?

**Moderator: explore drivers / barriers to each…**

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

### 3. Switching energy supplier

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

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

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

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

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

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

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

ASK ALL

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

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

**Moderator: explore drivers / barriers to each…**

- How confident do you feel about this?
  - What are the effects of this?
- How in control do you feel about this?
  - What are the effects of this?

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

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

SWITCHERS / CONSIDERERS

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

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

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

DONE NOTHING:
- Have you ever considered switching your tariff/ supplier?
  - Why/ why not?
- To what extent is switching tariff/ supplier easy / difficult?
  - Why do you say this?
  - What might get in the way of someone switching tariff/ supplier?
  - Why might someone not get around to switching tariff/ supplier?
- What would be the benefits to switching tariff/ supplier?
  - Why would this be a benefit?
    - NB: If says “to save money” – probe to understand if avoiding a price rise (e.g. at end of contract would flip to standard variable or because of supplier price rise), or because realised could reduce bills)
    - Would this encourage you to switch tariff/ supplier?
- What would be the drawbacks to switching tariff/ supplier?
  - Why would this be a drawback?
  - Would this discourage you from switching tariff/ supplier?
- What are the risks to switching tariff/ supplier?
  - Why would this be a risk?
  - Would this discourage you from switching supplier?
- Moderator: key question
- In what circumstances would you think about looking into a new energy supplier or tariff?
  - What would need to change?
  - If this factor had been different, do you really think that you would have acted differently? Why / why not?
I’d like you to think about how you would be likely to go about it if you did decide to look into getting a new energy supplier. This should be how you think you would really do this. *Moderator probe as appropriate*

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

*Moderator: key question for segment 5 in particular:*

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

**ASK ALL**

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

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

**SWITCHERS**

- Once you had made your decision about switching, what happened next?
- How did you go about actually making the switch?
- How easy/ difficult was this process?
- How does this compare to other times when you have switched a supplier in the past (for energy or something else)?
CONSIDERERS: HAVE DONE NOTHING

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

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

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

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

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

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

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

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

At what stage do you tend to look at a price comparison website? Why?

How do you feel about PCWs?
- Why?
- Would you say you are positive, neutral or negative about PCWs? Why?
- Generally speaking, what has been your experience of PCWs?

Thinking specifically about using PCWs in the energy market

To what extent would you say that PCWs are...
- Trustworthy
- Helpful
- Which other words would you choose to describe them?

To what extent have you used PCWs to switch energy supplier?
- Moderator: please explore any experiences understanding when and how PCWs were used

What are the advantages / disadvantages of using PCWs when looking at energy suppliers?

Do they have all of the available deals on offer?
- Moderator: explore responses here – is this based on experiences or something else?

Are they biased? Why do you say that? How does that affect how you use PCWs?

Is it clear how they calculate the savings on offer?
- How do you feel about this? Why?
- How does this affect how you use PCWs?

5. Summary, photos and vox-pops  10 mins

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

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

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

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