



CONSUMER ENGAGEMENT IN THE ENERGY MARKET 2018

Technical Report for research conducted on

behalf of:



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Issue: Final

Date: October 2018

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1 Survey methodology

1.1 2018 Consumer Engagement Survey

This year, the Consumer Engagement survey comprised two elements – a main and a boost survey. In an attempt to achieve a more robust sample size in both Wales and Scotland, extra sample points were covered in both countries to achieve a higher base size for further analysis within each. The following sections will provide more detail on the methodology for each.

The main survey

Fieldwork for the main 2018 survey was carried out between 26th March and 6th June 2018, in home and face to face using Computer Assisted Personal Interviewing (CAPI). Within the main survey, interviews were carried out with 4,064 gas and/or electricity consumers, including 3650 with both mains gas and electricity, 2 (<1% of the total sample) with mains gas only, and 412 (10% of the total sample) with mains electricity only. Overall, 3652 respondents had mains gas, and 4062 had mains electricity.

A conjoint section was added to the main survey, with the aim of developing a more nuanced view of what drives tariff preferences and switching behaviour. More details on the questionnaire and conjoint analysis can be found within the relevant sections below.

Other surveys

Two boost surveys were carried out this year in Wales and Scotland, in order to increase the sample sizes within each country to allow further analysis. In order to accurately determine a weighting scheme for these boosted samples, questions were run on the Kantar TNS and Beaufort omnibuses (amongst Scottish and Welsh households respectively), so that weighting targets could be established from larger samples than available in the ‘main’ consumer survey.

An online parallel run was conducted at the same time amongst consumers living in Great Britain (GB), to compare results across methods with the aim of testing the possibility of employing a hybrid or wholly online survey method in the future¹.

1.2 Sample universe and survey eligibility

The target sample for all surveys 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 (where the decision maker was unavailable – e.g. an adult still living at home where parents take responsibility paying for the bills);
- those dependent on a non-household member to manage bills on their behalf.

¹ Details on all of the additional surveys can be found within the relevant sections of the technical report

1.3 Stratification and sample point selection

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

1. All GB constituencies were listed and stratified by:
 - a. Region (former Government Office Regions)³ – this includes Scotland, Wales and the nine Regions in England;
 - b. Urban/rural indicator (Metropolitan County, Other 100% Urban, Mixed Urban/Rural, Rural);
 - c. Percentage of residents in AB socioeconomic group.
2. 294 constituencies were selected with probability proportional to population aged 16+;
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, 369 sampling points were issued (343 in the main sample and 26 each in the Wales & Scotland 'boost' samples) to 117 interviewers across Great Britain, with interviewers required to conduct 12 interviews per point, spread over a two-day assignment.

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

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>

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

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

Quota group	Target number of interviews set ⁶	%
16-34	946	21.36%
35-54	1596	36.04%
55+	1886	42.59%
Male working full time	1235	27.89%
Male NOT working full time	967	21.84%
Female working full/part time	1166	26.33%
Female NOT working full/part time	1060	23.94%

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.

1.5 Wales / Scotland boosts

The survey had previously been set up to be representative of the target audience (bill payers / partners) in Great Britain. This led to relatively small sample sizes in Wales (191 unweighted) and Scotland (357 unweighted), limiting the ability for in depth analysis within the home nations. As a result, in 2018 fieldwork boosts were conducted in both countries to increase the possibility for further analysis and reduce the confidence intervals associated with the survey estimates. An extra 200 interviews took place in Wales, and 100 in Scotland.

In order to establish a suitable weighting scheme for the boost samples, questions were run on omnibus surveys in each country by Beaufort (Wales) and Kantar TNS (Scotland), to determine accurate target populations of bill payers / partners within each nation⁷. Each sample was drawn to be representative of the individual nation, and stratified within the country based on constituencies. Respondents were asked the two opening questions from the main survey (Q1 and Q2) and the demographic profile of those who would qualify for the main survey (have mains gas and / or electricity, and some responsibility for paying the bills) was recorded and used to weight the total sample for each home nation.

Separate sets of tabulations were produced for Great Britain (main dataset only), and for Wales and Scotland (with interviews from the main sample added to the boost and weighted to targets taken from the omnibus surveys, as outlined above).

1.6 Online parallel run

In order to explore the possibility of transitioning the annual Consumer Engagement survey to an either wholly or hybrid online method, in 2018 a parallel online run took place. Given the importance of

⁶ These are the target number of interviews – note that targets always include an overage of around 10% on top of the total interviews required to accommodate any need to vary interview schedules, appointment cancellations or other variations that can occur during face to face fieldwork.

⁷ A detailed breakdown of the resulting weighting targets can be found in the weighting section

the internet in comparing and switching, Ofgem was keen to understand the impact of an online sample (predominantly made up of heavier internet users) on results and engagement levels. 500 interviews were conducted using the online access panel Toluna, with quotas on age, gender, social grade and region, to ensure a sample representative of bill payers / partners, mirroring the face to face sample.

The face to face questionnaire was respecified for online completion – this included increasing the number of open-ended questions (where precoded lists had been used in the face to face survey) to reflect the different methods, and using hover-over explanations where possible to explain terminology to respondents in place of show screens.

2 Questionnaire design

The original questionnaire was designed by Ofgem and TNS BMRB (now Kantar Public) for the 2014 baseline study and evolved through 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. Further (though less significant) changes were made again in 2018, after Ofgem identified several new focus areas.

The median interview length for the 2018 survey was 31.9 minutes.

2.1 Main questionnaire changes between 2017 and 2018

All changes to the questionnaire were logged, throughout the development process. An outline of all changes (additions, amendments and deletions) made between 2017 and 2018, and a full version of the 2018 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 Conjoint section

When scoping the project for this year, Ofgem identified a need to gain a more nuanced understanding of what tariff features consumers want and which are most likely to drive engagement. In order to answer these questions, GfK recommended utilizing a full choice based conjoint analytical method. This enables able modelling of switching levels based on offering respondents a range of packages, and the impact of adding further choice into the market.

Respondents were asked to give their bill amount for electricity / gas / energy (qDummbill) (based on what fuels they used in their home). Depending on the respondents' payment and fuel type, the script applied one of nine options (conjset1-9) which determined the packages which the respondent would see. There were two adaptations of the conjoint – one for those who paid wholly via a prepayment meter (which only included this as a possible payment type), and one for those who paid via other methods (who were given a choice of payment types to chose from).

Respondents were shown a selection of seven different grids, each with a choice of four different packages with the following hypothetical attributes determined. The full conjoint grids and levels are appended. In total, the conjoint model tested 1,400 combinations of attributes and levels.

- Supplier: with the option to remain with current supplier, or change to (another) of the “6 Largest”; or to a medium/better established or small supplier
- Savings: based on the bill amount provided by the respondent, different levels of savings from 5 – 30%
- Quality of service: with options to move to suppliers with Trustpilot scores of one, three or five stars
- Payment method: for non-PPM respondents only, the option to either pay by direct debit; on receipt of bills; or via a prepayment meter
- Bill type: either receiving paper bills through the post or online management
- Tariff type: options for either a fixed term or variable tariff
- Exit fees: Options for no exit fee, or fees of £30 (for fixed term tariffs only)

Each deal package would offer one option from each of the above features, and respondents would have to pick their preference from each grid. An example screenshot of the grids that respondents saw is given below.

Which ONE of these would you prefer?

	A	B	C	D
Supplier	Move to one of the suppliers from Group B	Move to one of the suppliers from Group C	Move to one of the suppliers from Group A	Stick with your current supplier
Savings	£52 \ 20%	£78 \ 30%	£39 \ 15%	£26 \ 10%
Quality of service	3 stars	3 stars	1 star	5 stars
Payment Method	Pay on receipt of bills	Direct Debit	Pay on receipt of bills	Direct Debit
Online management	Receive paper bills	Online account management, no paper bills	Receive paper bills	Online account management, no paper bills
Whether fixed or variable rate	2 year fixed rate	3 year fixed rate	1 year fixed rate	Variable rate
Exit fee	£30 per fuel to leave this plan early	No fee to leave this plan early	£30 per fuel to leave this plan early	No fee to leave this plan early
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Previous
Next

After choosing, a follow-up screen would ask respondents whether they would actually switch to that deal were it available in real life⁸. Interviewers went through an example with respondents first, to ensure they understood what they were answering and what each of the features meant (show screens also explained these).

Following this, four calibration questions were shown to respondents, where four different deals were shown one at a time to respondents, who were asked to rate their likelihood to switch to it (from definitely would to definitely would not). The answer codes were alternated between respondents to minimize any bias introduced by keeping the same ordering throughout. The responses to these questions were used to translate preferences into actual switching levels – responses given to the grid were up or down weighted based on the certainty of the respondent that they definitely would / wouldn't actually switch⁹.

⁸ In many conjoint exercises, respondents are offered the option of taking any of the presented packages, or saying they would not take any of them. However, because of low levels of engagement in the market, we were concerned that many respondents would simply choose 'none' for all options, and we would not gain enough feedback on the attributes and levels to be able to conduct the required modelling. Instead we used a method called 'double response none' whereby all are asked to state their preference from a choice of four tariffs, and then asked whether they would switch to that tariff if it were available.

⁹ More information on this and the resulting analysis can be found in the analysis section below

2.1.2 New areas of interest

A number of other questions were added in 2018 in order to explore several new issues which Ofgem had identified since the 2017 survey:

- Risk aversion (BB1/2/3): to explore how open to risk consumers are – three questions on whether people would prefer to receive a smaller amount of cash sooner, or to put off receiving and receive more, and whether they would take bets with different levels of payback.
- Satisfaction with switching experience (Q158/9): two questions asking those who have switched supplier or tariff in the past 12 months how satisfied they were with how easy the switching process was, and the control they had over the data to be switched over
- Price cap (CAP1/2): two questions were added on the price cap introduced by Ofgem in 2017 – one to measure awareness of the policy, and one to measure if respondents (correctly or incorrectly) were aware if it applied to them or not
- Receipt of means tested benefits or tax credits (133i): in order to enable Ofgem to further analyse results by different socioeconomic groups, this question was added in to understand which respondents were in receipt of means tested benefits
- PPM (PPM1/2): two questions were added for customers using a prepayment meter to pay for their energy, asking about self-disconnection (through not topping up meter). Respondents were asked how often (if ever) this had happened to them, and if it had, what was the longest period it had lasted
- Hybrid / electric vehicles: Ofgem identified a need to better understand take up of smart home appliances, as well as electric / hybrid vehicles. Several codes were added at qProper asking whether respondents owned any of the following (in addition to the codes from 2017): fully electric car / vehicle; hybrid car / van; home energy storage; Smart heating controls or Smart bulbs / lamps / lighting controls

A list of questions which were removed from the questionnaire this year can be found below.

3 Analysis and reporting

3.1 Weighting

3.1.1 Main dataset

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.

Weights for main 2018 dataset, as in 2017, were set based on the profile of eligible respondents in 2016, using the same variables (namely age and social grade within gender, working status within gender and Government Office Region). Weighted and unweighted profiles are shown below.

Table 3.1 Weighted and unweighted profiles

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

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

These were as follows:

- 22 people refused to give their age (25 including boosts)
- 3 people said they were of an other gender (than male or female) or and 2 refused to state their gender (3 and 2 including boosts)
- 6 people did not know their working status, and 18 people refused to say (6 and 20 including

boosts)

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

3.1.2 Wales / Scotland Boosts

Unweighted and weighted sample profiles for the Wales and Scotland tabulations are shown below. Weighting targets were taken from the Beaufort and TNS Omnibus Surveys.

	Wales		Scotland	
	Wtd	Unwtd	Wtd	Unwtd
Male	47%	49%	48%	49%
Female	53%	51%	52%	51%
16-34	22%	22%	22%	23%
35-64	49%	44%	50%	48%
65+	29%	33%	28%	29%
AB	20%	16%	21%	9%
C1	28%	22%	35%	20%
C2	20%	24%	20%	22%
DE	32%	37%	24%	49%

The effective sample sizes for the boost samples were 389 for Wales and 357 for Scotland.

3.1.3 Online parallel run

Following the completion of the online fieldwork, test weighting was run, weighting together the non/low internet users from the face-to-face survey with the online sample (using propensity weighting, conducted by GfK's Marketing Sciences Team). The profiles were checked at length, as well as segment make-up and responses for key indicators of engagement and action between the hybrid sample and the representative face-to-face sample. The online sample was found to have significantly higher engagement levels¹⁰.

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

¹⁰ See key results in annex

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 disengaged – 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)
- Price cap eligible – costomers on a standard variable tariff
- CMA database group eligible – not switched for past four years
- Potentially vulnerable consumers – any of the following; aged 65 and over; household income <£16,000; in arrears on energy bills; rents form local authority; payment on receipt or bills or via a prepayment meter

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 2017 and 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 = 751) within the total number of consumers (4064). Therefore, $751/4064*100 = 18\%$ of consumers switched supplier in the 2018 survey.

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

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

Metric	Question Numbers
Any of the 6 Largest suppliers	Q3_Q151 / Q4_Q151
Payment type for gas and/or electric	Q5 / Q6
Switched supplier in the last 12 months	Q138 / Q139
Ever switched	Q21 / Q22
Changed tariff with existing supplier in the last 12 months	Q35 / Q36
Ever changed tariff with existing supplier	TmesG / TmesE
Compared tariffs with other supplier (but not switched supplier or changed tariff) in the last 12 months	ChngG / ChngE
Compared tariffs with own supplier (but not switched supplier or changed tariff) in the last 12 months	ChngG / ChngE
Active Consumers - Active in the energy market in the last 12 months either by comparing tariffs, changing their tariff with their existing energy supplier or switching supplier	Q138 / Q139 / TmesG / /TmesE / ChngG / ChngE
Changed payment method in the last 12 months	ChngG / ChngE

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

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

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

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

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

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

Metric	Question Numbers
Switched via an online price comparison service / Switched by another method	Q29 / Q34 / Q156
Confident on the best energy deal for them	Q123 / Q124 / Q125

Familiar with...the features of current tariff	Q89 / Q90 / Q153
Satisfied with overall service received from current supplier(s)	Q59 / Q63 / Q67
Trust current supplier(s) to...treat them fairly in their dealings with them	Q60_1 / Q64_1 / Q68_1
Trust current supplier(s) to...provide clear and helpful information	Q60_2 / Q64_2 / Q68_2
Trust current supplier(s) to...charge a fair price	Q60_3 / Q64_3 / Q68_3

3.5 Segmentation

Cases from the 2018 dataset were allocated into the segmentation set up last year using the allocation algorithm and shortened question set¹¹. The same questions were used in 2017. The overall allocation efficiency was 78%. This means that 78% of cases were allocated into the same segment they would have been allocated to if they had completed the full segmentation questionnaire (and not only the shortened question set).

3.6 Conjoint

3.6.1 Data cleaning

There were 3 stages of data cleaning. The first stage identified respondents who consistently selected the same position across the iterations in the conjoint section: for example, in all tasks the respondent always chose the option presented at the furthest left on the screen. As the conjoint design is randomised it is extremely unlikely that a respondent giving full and considered answers would always choose the same position. Respondents who chose the same position in 6 or more of the 7 tasks were removed from the analysis – 342 respondents did this.

The second stage of cleaning is conducted later in the analysis: using a goodness of fit metric called Root Likelihood (RLH). This is calculated based on the utility scores for each respondent. A low RLH indicates that the utilities do not fit the data for that respondent, implying the respondent has not answered the conjoint tasks in a consistent way. Respondents with a RLH of less than 0.22 were removed - this accounted for the removal of 34 respondents.

The final cleaning stage identified respondents believed to be disengaged / bored whilst responding. Any respondents who did not select none in the first three tasks but selected the none in each of the last three tasks were removed. 17 respondents answered in this way.

In total, 393 respondents were removed through this data cleaning process, so 1,920 cases were included in the conjoint analysis.

¹¹ See appendix 5.2

3.6.2 The modelling process

The analysis was run using Sawtooth Software's CBC/HB software which produced a utility score for each level tested within the conjoint grid, for every respondent. A utility is a measure of relative desirability or worth: the higher the utility, the more desirable the attribute level. Levels that have high utilities have a large positive impact on influencing respondents to prefer a tariff.

A standard Share of Preference (SOP) simulation model was used to predict share for each tariff. The SOP model calculated the probability of a respondent choosing a tariff and was based on the total utility for each tariff. Within the SOP model, a package with a high negative utility (i.e. a low desirability) will always have 0% probability.

3.6.3 Converting Preference to take up rates

The output of the conjoint analysis calculated the preference/appeal of tariffs. However, it is important to recognise that these preference shares cannot be assumed to represent actual market share.

In order to obtain more realistic take up rates, all respondents were taken through the calibration exercise which asked them directly how likely they would be to take up a number of pre-defined tariffs.

The 5 tariffs presented were chosen to provide a good representation across all possible tariff combinations; one tariff was made up of the *best* features, another made up of the *worst* features and 3 tariffs in-between with varying levels of desirability.

A further stage in the conversion of preference to take up rate involved the use of GfK's "Truth" index or down-weighting index to convert responses to these calibration questions into a probability or propensity to take up each tariff. The "Truth" index accounted for the fact that not all respondents who say they will take up a tariff will actually go ahead and do so. For example, if a respondent said they will definitely take up the tariff, we believe only a certain percentage of those will actually do so.

From the analysis of the main conjoint section, we determined the utility or desirability of the 5 tariffs and using the "Truth" index we estimated the proportion of respondents who would take-up each of the tariffs. Through standard polynomial regression techniques we created an equation to enable us to estimate the take up rates for any potential tariff, using any combination of attributes and levels.

In terms of how it is implemented, for any simulation, we know the utility/desirability of each of the tariffs in the simulation and we then used the regression equation generated to estimate what percentage of those that prefer a tariff will actually go ahead and take up the tariff. This behavioural data is overlaid on to the original SOP calculations. For example, a particular tariff might have a share of preference of 20%; we know this tariff has a utility/desirability of X and by entering this utility score into our the regression equation we estimated that only 10% of these respondents will take up the tariff, thereby reducing the figure down to 2% (10% of 20%). All this analysis is done at the individual respondent level to enable robust estimates. This technique allowed us to convert conjoint SOP figures into more real-world switching estimates.

3.6.4 Simulator

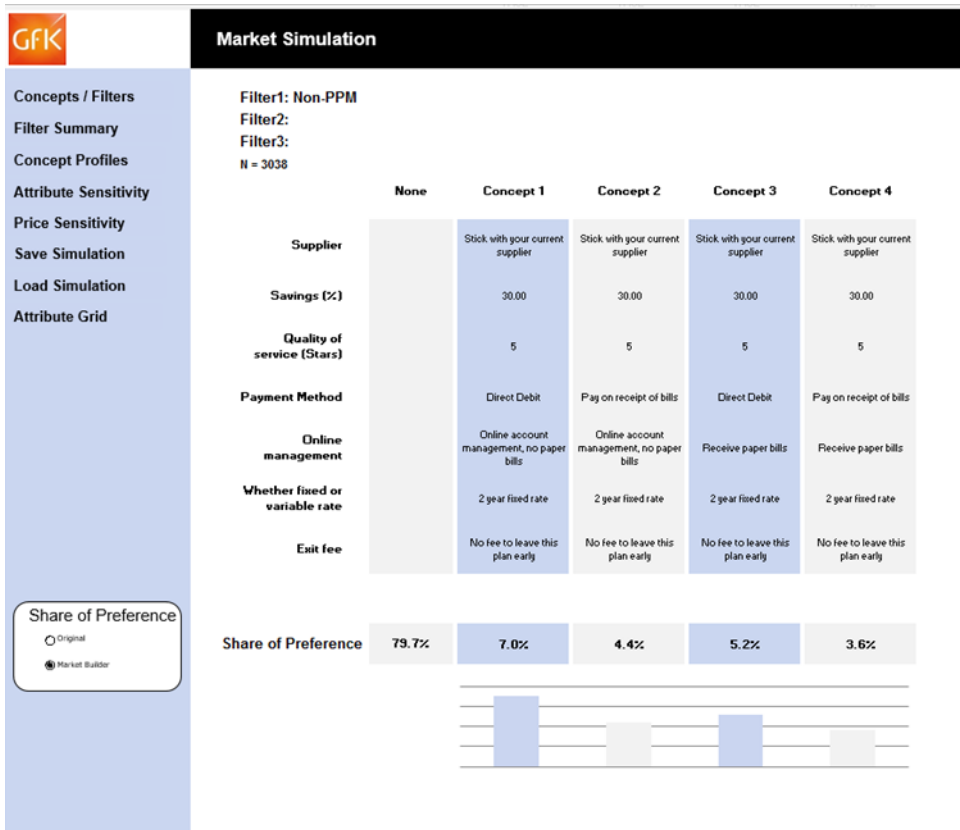
The final outcome from the modelling was a simulator which enables researchers and Ofgem to access the data and conduct 'what if?' experiments. All respondents (except those removed in the cleaning process) were included in the simulator, though separate simulations are required for PPM and non-PPM consumers.

The simulator allows the user to toggle between the SOP figures and take up figures by using the 'Analysis Type' button from the main simulation page. Other functions within the simulator include:

- Filter: Allows the user to review preferences/switching levels for different tariffs by different sub-sets of the population.

- Importance/utility chart: Allows the user to view the Importance and utility scores for each of the attributes tested.
- Filter summary: Allows the user to view the SOP figures (or propensity figures) simultaneously for all filters.

The simulator has been provided as a separate output, but an example of a simulator output is shown below. This shows likely take up rates based on a number of tariffs.



3.6.5 Notes in using the simulator estimates

In using the estimates provided by the simulator, please note the following:

- Estimates are a snapshot in time based on respondents' current financial, economic and household situation.
- Estimates are also based on households' current needs
- Estimates will be sensitive to changes in the economy, interest rates, etc.
- Estimates may be influenced by good/poor reputation of the energy market, word of mouth, press, marketing, etc
- The reputation of the individual energy suppliers and of Ofgem as a supplier of information/regulation will all impact
- Because of these factors, the switching estimates provided should be treated as a snapshot of possible levels, and would only be applicable in the short term.
- Estimates are only based on the tested attributes and levels

3.6.6 Notes on significance testing

Because the figures produced by the simulator are probabilities rather than mean scores or percentages answering a survey question, it is not generally appropriate to conduct significance testing on these estimates.

The probabilities have been generated from a Hierarchical Bayes estimation as part of the SOP analysis, and from the application of the Truth Index and regression calculations associated with calibration. Because of this, the figures on which we would want to conduct significance testing are not single probabilities, but a composite of a number of probability scores.

The closest estimate to significance testing which would be possible is to conduct a panel test on the percentage take-up level. This assumes that you have asked a panel of respondents the same question multiple times, and you are testing whether the change in response to that question differs significantly from the first.

3.7 Accompanying data tables

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 2018 survey, with the exception of the conjoint section, 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 and segment). The data tables also include a set of tables showing each analysis crossbreak against the other analysis crossbreaks.

A unit record 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).

4 Annex tables

Table 4.1 Key results – 2014 vs 2015 vs 2016 vs 2017 vs 2018

Question No.	Calculation method ¹²	Question	2014	2015	2016	2017	2018	
		<i>Base all consumers unless otherwise stated (2014:6151; 2015:5934; 2016:5956; 2017: 4001; 2018: 4064)</i>	<i>Percentage</i>					
Awareness and activity in the energy market								
Q14	Simple %	Aware that consumers can switch supplier	88	90	89	86	87	
Q14	Simple %	Aware that consumers can change tariff with existing supplier	82	85	84	77	81	
Q14	Simple %	Aware that consumers can change payment method	80	83	85	79	82	
Q14	Simple %	Aware of all three actions	75	79	80	72	69	
Q14	Simple %	Aware of none of the actions/don't know	8	6	5	6	8	
Q138/ Q139	% consumers	Switched supplier in the last 12 months	14	13	15	18	18	
Q138/ Q139	% consumers	Switched supplier, but not in the last 12 months	53	51	48	43	43	
Q21/ Q22	% consumers	Ever switched supplier ^{13*}	67	63	63	62	65	
Q21/ Q22	% consumers	Never switched*	40	33	45	35	34	
WhnSG/ WhnSE	% consumers	Changed tariff with existing supplier in the last 12 months*	16	17	17	16	15	
ChngG/ ChngE	% consumers	Compared tariffs with other supplier (but not switched supplier or changed tariff) in the last 12 months*	7	9	9	11	26	
ChngG/ ChngE	% consumers	Compared tariffs with own supplier (but not switched supplier or changed tariff) in the last 12 months*	7	8	7	9	20	

¹² 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)

¹³ Whether respondent has ever switched either gas, or electricity supplier



Question No ^o	Calculation method ¹²	Question	2014	2015	2016	2017	2018
Q138/ Q139/ WhnSG/ WhnSE/ ChngG/ ChngE	% consumers	Active Consumers - Active in the energy market in the last 12 months either by comparing tariffs, changing their tariff with their existing energy supplier or switching supplier*	34	37	37	41	41
ChngG/ ChngE	% consumers	Changed payment method in the last 12 months*	4	4	4	6	6
Q94	Simple %	Recall of Annual Summary	55	59	60	59	62
Q94	Simple %	Recall of Bill or direct debit/ prepayment statement	69	69	70	71	71
Q94	Simple %	Recall of Price increase notification letter	48	29	22	40	43
Q94	Simple %	Recall of End of fixed term tariff notice	20	19	21	25	31
Consumer segments							
Derived		Market sceptics				14	11
Derived		Happy shoppers				20	19
Derived		Anxious avoiders				13	16
Derived		Contended conformers				20	20
Derived		Hassle haters				20	21
Derived		Savvy switchers				13	13
Behaviour around switching and comparing							
Q160	Simple %	Switched supplier, changed tariff or compared tariffs to save money <i>Base: Active Consumers - All those who switched supplier, changed tariff or compared tariffs in the last 12 months (2014: 2000; 2015:2034; 2016:2112; 2017: 1558)</i>	91	91	91	91	91

Question No.	Calculation method ¹²	Question	2014	2015	2016	2017	2018
Q166	Simple %	Currently or expects to pay less for energy as a result of switching supplier or changing tariff <i>Base: All those who switched supplier or changed tariff with the aim of saving money¹⁴ (2014: 1352; 2015:1306; 2016:1424; 2017: 957)</i>	77	83	86	83	79
Q165	Simple %	Found out about deals offered when last compared, changed or switched via an online price comparison service <i>Base: Active Consumers - All those who switched supplier, changed tariff or compared tariffs in the last 12 months (2014: 2000; 2015:2034; 2016:2112; 2017: 1558)</i>	39	46	51	49	54
Q123 / Q124 / Q125	% responses	Confident on the best energy deal for them	55	48	50	56	58
Experiences in the energy market							
Q73	Simple %	Feel there is about the right amount of choice of different tariffs available	45	44	48	46	47
Q145	Simple %	Feel it is easy to compare tariffs	37	38	43	47	51
Q94	Simple %	Recall receiving at least one communication (annual statement, bill or direct debit/ prepayment statement, price increase notification, end of fixed term tariff letter	83	82	82	82	84
Q153 / Q89 / Q90	% responses	Familiar with...the features of current tariff	43	41	44	50	57
Q59 / Q63 / Q67	% responses	Satisfied with overall service received from current supplier(s)	72	75	77	77	76

¹⁴ Consumers who said 'Yes' at any of Q18, Q19, Q35, Q36, Q20 AND 'Save money' at Q160



Question No.	Calculation method ¹²	Question	2014	2015	2016	2017	2018
Q60_1 / Q64_1 / Q68_1	% responses	Trust current supplier(s) to...treat them fairly in their dealings with them	62	64	66	67	73
Q60_2 / Q64_2 / Q68_2	% responses	Trust current supplier(s) to...provide clear and helpful information	65	64	66	66	73
Q60_3 / Q64_3 / Q68_3	% responses	Trust current supplier(s) to...charge a fair price	51	55	58	58	65
Q76	Simple %	Made a complaint	10	9	9	10	10
Q81	Simple %	Had reason to complain but didn't <i>Base: All those who hadn't complained in the last 12 months to current/previous supplier (2014: 5568; 2015: 5399; 2016:5446)</i>	3	4	3	2	3
Empow	Simple %	Agree that 'I always check bank or building society statements when I get them'	80	81	82	83	82
Energy supply and payment/account characteristics							
Q1	Simple %	Gas supply only	<1	<1	<1	<1	0
Q1	Simple %	Electricity supply only	10	11	12	11	10
Q1	Simple %	Gas and electricity supply	90	89	88	89	90
Q10	Simple %	On an online tariff	34	39	47	50	53
Q11	Simple %	On a fixed term tariff	42	38	40	50	53
Q11	Simple %	On a standard variable tariff or mixed arrangement	58	62	60	41	39
Q5 / Q6	% consumers	Pays for gas and/or electricity by direct debit*	65	71	73	73	77
Q5 / Q6	% consumers	Pays for gas and/or electricity by prepayment meter*	15	18	16	17	14



Question No.	Calculation method ¹²	Question	2014	2015	2016	2017	2018
Q13	Simple %	Has an electricity (time of use) meter <i>Base: All those who have an electricity supply (2014:6130; 2015:5923; 2016:5939)</i>	12	11	12	25	24

Table 4.2 Key segment characteristics

	Market Sceptics	Happy Shoppers	Anxious Avoiders	Contented Conformers	Hassle Haters	Savvy Searchers
<i>Base= all consumers within segment:</i>						
	439	753	679	820	894	479
Switched supplier in the last 12 months	17%	32%	13%	6%	13%	34%
Switched, but not in the last 12 months	50%	44%	45%	46%	38%	45%
Ever switched supplier	67%	76%	60%	55%	54%	81%
Never switched supplier	31%	23%	38%	43%	45%	19%
Changed tariff in the last 12 months	14%	26%	8%	10%	12%	22%
Compared tariffs with those offered by other suppliers ¹⁵	27%	43%	21%	10%	15%	45%
Compared tariffs with those offered by existing supplier	21%	29%	14%	11%	15%	36%

¹⁵ Please note that in 2014 the comparison questions were asked of those who had not switched supplier or changed tariff in the last 12 months only, whereas in 2015 all consumers were asked these questions



	Market Sceptics	Happy Shoppers	Anxious Avoiders	Contented Conformers	Hassle Haters	Savvy Searchers
Familiar with...the features of current tariff	47%	74%	41%	46%	65%	68%
Recall of Annual Summary	58%	67%	48%	67%	60%	71%
Recall of Bill or direct debit/prepayment statement	69%	78%	54%	76%	70%	81%
Recall of Price increase notification letter	43%	44%	39%	45%	44%	44%
Recall of End of fixed term tariff notice	26%	40%	24%	30%	29%	38%
Made a complaint	25%	8%	8%	6%	9%	12%
% of consumers in England	71%	71%	70%	75%	70%	76%
% of consumers in Wales	11%	8%	17%	8%	9%	9%
% of consumers in Scotland	18%	22%	13%	17%	20%	16%
Aged 16-34	20%	20%	19%	12%	28%	17%
Aged 35-64	54%	55%	46%	40%	53%	61%
Aged 65+	25%	25%	34%	47%	19%	21%
Social Grade AB	26%	24%	22%	16%	20%	32%
Social Grade C1	33%	37%	28%	33%	31%	38%
Social Grade C2	22%	19%	21%	22%	22%	15%
Social Grade DE	19%	20%	29%	28%	28%	15%
Owner Occupier	64%	65%	56%	62%	56%	68%



	Market Sceptics	Happy Shoppers	Anxious Avoiders	Contented Conformers	Hassle Haters	Savvy Searchers
Social Renter	17%	18%	26%	24%	18%	15%
Private Renter	18%	16%	17%	12%	24%	16%
English is not first/main language	5%	6%	6%	8%	8%	3%
Agree that 'I always check bank or building society statements when I get them'	83%	91%	48%	90%	89%	85%
Regular internet user (at least once a day)	85%	87%	67%	62%	75%	92%
On a fixed term tariff	45%	67%	38%	45%	48%	62%
Pays for gas and/or electricity by direct debit	76%	81%	68%	75%	77%	84%
Pays for gas and/or electricity by prepayment meter	13%	13%	18%	15%	15%	11%
Has an electricity (time of use) meter	25%	26%	28%	18%	26%	22%
6 Largest Supplier for gas and/or electricity	77%	62%	76%	79%	77%	58%



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

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

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

Group		2018		2017		2016		2015	
		Base	%	Base	%	Base	%	Base	%
All consumers		4064	18	4001	18	5956	15	5934	13
Age	16-34	805	21▲	807	22▲↑	1147	19▲	1098	17▲
	35-64	1984	21▲	2049	19▲↑	2679	16▲	2734	15▲
	65+	1253	12▼	1126	12▼↑	2130	11▼↑	2102	8▼
Social Grade	AB	741	23▲	752	22▲↑	1171	18▲	1071	16▲
	C1	1074	21▲	1083	20▲↑	1551	15▲	1469	14▲
	C2	725	16↑	806	13▼	1139	14▼	1066	12▼
	DE	1524	12▼	1360	13▼↑	2095	12▼↑	2328	10▼
Income	Under £16K pa	984	16	859	15↑	2093	12	2406	11
	£16K+ pa	1877	21▲	1805	21▲↑	2995	17▲↑	2735	15▲
Internet use	Frequent user	2939	21▲	2923	21▲↑	4023	17▲	4257	16▲
	Infrequent/non-user	1094	9▼	1043	8▼	1856	7↑	1677	4
How pay	Direct debit	3013	20▲	2799	19▲↑	4238	16▲	4216	15▲
	Standard credit	271	7▼	339	7	515	6	603	5
	Prepayment	658	20	779	18▲	981	16▲	1054	13▲
meter	Supplier	2945	11▼	3082	11↑	4716	9	4986	8
	Any of the 6 large suppliers								



Group		2018		2017		2016		2015	
		Base	%	Base	%	Base	%	Base	%
With a medium/smaller supplier		1119	38▲	919	37▲	1240	36▲	948	38▲
Country	England	3052	19	3453	18▲	5057	16▲	5069	14▲
	Scotland	662	18↑	357	13▼	524	12	551	10
	Wales	350	18↓	191	24▲↑	375	12	314	11

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

Group		2018		2017		2016		2015	
		Base	%	Base	%	Base	%	Base	%
All consumers		4064	15	4001	16▲	5956	17▲	5934	17▲
Age	16-34	805	12▼	807	13▼	1147	12▼	1138	14▼
	35-64	1984	17▲	2049	17▲	2679	19▲	3108	18▲
	65+	1253	14	1126	15	2130	17▲	1688	17▲
Social Grade	AB	741	19▲	752	21▲	1171	23▲	1339	27▲
	C1	1074	16	1083	18▲	1551	18▲	1889	18▲
	C2	725	14	806	12▼	1139	15▲	1236	15▲
	DE	1524	9▼↓	1360	11▼	2095	11▼	1470	9▼
Income	Under £16K pa	984	13▼	859	14↑	2093	11	1896	10
	£16K+ pa	1877	17▲	1805	18▲	2995	20	3278	22▲
Internet use	Frequent user	2939	17▲	2923	18▲	4023	19▲	4642	20▲
	Infrequent/non-user	1094	8▼	1043	10	686	12↑	1292	8
How pay	Direct debit	3013	17▲	2799	18▲	4135	21▲	4216	22▲



Group		2018		2017		2016		2015	
		Base	%	Base	%	Base	%	Base	%
	Standard credit	271	8▼	339	7▼	606	9▲	603	9▲
meter	Prepayment	658	9▼	779	9▼↑	1087	5▼	1054	6▼
Supplier	Any of the 6 large suppliers	2945	13▼	3082	14	4716	16	4986	17
	With a medium/smaller supplier	1119	21▲	919	21▲	1240	18	948	19
Country	England	3052	15	3453	16▲	5057	17	5069	18▲
	Scotland	662	14	357	12▼	524	17↑	551	16
	Wales	350	15	191	15	375	15	314	12

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

Group		2018		2017		2016		2015	
		Base	%	Base	%	Base	%	Base	%
	All consumers	4064	26	4001	25▲	5956	26▲	5934	26▲
Age	16-34	805	27	807	25▲	1147	25▲	1138	25▲
	35-64	1984	29▲	2049	28▲	2679	30▲	3108	29▲
	65+	1253	19▼	1126	20▼	2130	21▼	1688	21▼
Social Grade	AB	741	38▲	752	36▲	1171	36▲	1339	37▲
	C1	1074	27	1083	29▲	1551	28▲	1889	29▲
	C2	725	22▼↑	806	17▼	1139	24▲	1236	23▲
	DE	1524	14▼	1360	15▼	2095	16▼	1470	16▼
Income	Under £16K pa	984	18▼	859	20	2093	17	1896	17
	£16K+ pa	1877	32▲	1805	31▲	2995	32▲	3278	32▲



Group		2018		2017		2016		2015	
		Base	%	Base	%	Base	%	Base	%
Internet use	Frequent user	2939	30▲	2923	29▲	4023	31▲	4642	31▲
	Infrequent/non-user	1094	10▼	1043	14	686	11	1292	10
How pay	Direct debit	3013	28	2799	29▲	4135	31▲	4216	31▲
	Standard credit	271	13▼	339	13▼	606	15▼	603	14▼
meter	Prepayment	658	18▼	779	15▼	1087	15▼	1054	16▼
Supplier	Any of the 6 large suppliers	2945	21▼	3082	20	4716	24	4986	23
	With a medium/smaller supplier	1119	39▲	919	41▲↑	1240	34▲	948	41▲
Country	England	3052	25	3453	26▲	5057	27	5069	27▲
	Scotland	662	25↑	357	17▼	524	24↑	551	24↑
	Wales	350	32▲	191	27▲	375	23	314	20

Chart 1 Profile of the CMA database group

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

		CMA database group (1,975)	Non CMA Group (2,0899)
Age	16-34	21%▲	18%▼
	35-64	44%▼	57%▲
	65+	34%▲	24%▼
Social grade	ABC1	48%▼	62%▲



		CMA database group (1,975)	Non CMA Group (2,0899)
	C2DE	52%▲	38%▼
Annual household income	Below £16,000	24%▲	20%▼
	Above £16,000	42%▼	55%▲
Internet use	Daily internet user	68%▼	84%▲
	Uses internet (less frequently)	14%▲	9%▼
	Non-user	18%▲	6%▼
Bill type	Direct Debit	70%▼	83%▲
	Standard Credit	9%▲	4%▼
	PPM	18%▲	11%▼
Tariff type	Fixed term	36%▼	63%▲
	Variable tariff	49%▲	27%▼
	Mixed	1%▼	3%▲
Whether has smart meter	Yes	16%▼	21%▲
	No	84%▲	79%▼

5 Questionnaire and filters

5.1 Changes and additions made to questionnaire between 2017 and 2018

Type/ description	Question number	Question name	2017	2018
Amendment/ change to answer codes	<i>Empow</i>	<i>Empow</i>	<p>To what extent do you agree or disagree with these things?</p> <ul style="list-style-type: none"> i. As soon as I see a problem or challenge I start looking for possible solutions ii. I am able to follow through with things once I've made up my mind to do something iii. I can't possibly know everything before making a decision iv. I usually continue to search for an item until it reaches my expectations v. When shopping for a major purchase, I don't mind spending several hours looking for it vi. I would rather stick with a product that I currently buy than try something I'm not sure of vii. I am usually among the first to try a new product when it appears on the market viii. I will give in if a negotiation is not going my way ix. When looking for new products and services, I often find the amount of information overwhelming x. I always like to look for ways that I can save money, even if it is only a little xi. I always check bank or building society statements when I get them, including online 	<p>To what extent do you agree or disagree with these things?</p> <ul style="list-style-type: none"> i. As soon as I see a problem or challenge I start looking for possible solutions ii. I am able to follow through with things once I've made up my mind to do something iv. I usually continue to search for an item until it reaches my expectations vii. I am usually among the first to try a new product when it appears on the market xi. I always check bank or building society statements when I get them, including online
Addition/ new question	<i>QBB1</i>	<i>QBB1</i>		<p>Now, thinking about something completely different for a moment, we're interested in how you might deal with some situations. Please imagine that you have been offered some money, and are given the option of receiving a</p>



Type/ description	Question number	Question name	2017	2018
				<p>smaller amount now or a larger amount in the future.</p> <p>SHOW SCREEN</p> <p>Would you prefer £100 in cash today, or £200 in cash guaranteed in one month?</p> <p style="text-align: right;">1: £100 today 2: £200 in one month 98: Refused</p>
Addition/ new question	QBB2	QBB2		<p>And would you prefer £100 in cash guaranteed in 6 months, or £200 in cash guaranteed in 7 months?</p> <p style="text-align: right;">1: £100 in 6 months 2: £200 in 7 months 98: Refused</p>
Addition/ new question	BB3	BB3		<p>Now, imagine someone invites you to take a bet on a simple “heads or tails” coin toss. Would you take the following bets?</p> <p>i. If the coin turns up heads then you lose £2; if the coin turns up tails then you win £6</p> <p>ii. If the coin turns up heads then you lose £3; if the coin turns up tails then you win £6</p> <p>iii. If the coin turns up heads then you lose £4; if the coin turns up tails then you win £6</p> <p>iv. If the coin turns up heads then you lose £5; if the coin turns up tails then you win £6</p> <p>v. If the coin turns up heads then you lose £6; if the coin turns up tails then you win £6</p> <p>vi. If the coin turns up heads then you lose £7; if the coin turns up tails then you win £6</p> <p style="text-align: right;">1. Yes, I would take this bet 2. No, I wouldn't take the bet</p>



Type/ description	Question number	Question name	2017	2018
				98. Prefer not to say
Amendment/ change to answer codes	Q3	Q3	Old supplier list	New supplier list
Amendment/ change to answer codes	Q4	Q4	Old supplier list	New supplier list
Amendment/ change to answer codes	Q151	Q151	Old supplier list	New supplier list
Addition/ new question	<i>Dummbill</i>	<i>Dummbill</i>		From our calculation, this would make your energy bill £<value> per year. Is this right Yes - Continue No – go back to Q8 and check amounts
Addition/ new question	<i>Eleconly</i>	<i>Eleconly</i>		You said a moment ago that your total energy bill is <show amount from Q8> <if Q9=1-7 show period from Q9>. How much of that is spent on electricity <if Q9=1-7 show period from Q9>? ENTER NUMBER: CAPI check number is lower than given at Q8 99. Don't know
Addition/ new question	<i>Gasonly</i>	<i>Gasonly</i>		So that means you spend (dummbill – dummelec) on gas <if Q9=1-7 show period from Q9>. Does that sound about right? Yes –calculate dummgas No – return to Eleconly and check figures 99 Don't know



Type/ description	Question number	Question name	2017	2018
Amendment/ change to answer codes	Q165	Q165		New codes added: 14. Advertising (e.g. TV, radio, newspaper or online advert) 15. Article in the press (newspaper, magazine or online)
Addition/ new question	Q158	Q158		Thinking of the last time you <answer from Dumm1>, taking into account every part of the process, from considering switching to the switch completion, how much do you agree or disagree with the statement? "I found the process of switching easy" 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
Addition/ new question	Q159	Q159		To what extent do you agree or disagree with the following statement: "The last time I switched supplier, I had sufficient control over the date I would actually be switched over" 1: Agree strongly 2: Agree slightly 3: Neither agree or disagree 4: Disagree slightly 5: Disagree strongly 98: Refused 99: Don't know



Type/ description	Question number	Question name	2017	2018
Amendment/ change to answer codes	Q121	Q121	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	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 vi) It's too hard to work out whether I would save or not if I switched
New intro text	<i>Conjoint</i>	<i>Conjoint</i>		Next I would like to ask you some questions about changes which you could make to your <conjset = 1 2 "energy" / conjset=3 4 8 9 "electricity" / conjset=5 6 7 "gas"> supply. I am going to show you some examples of <conjset = 1 2 "energy" / conjset=3 4 8 9 "electricity" / conjset=5 6 7 "gas"> deals, and ask you which you'd prefer. Don't worry, I'm not going to try to sign you up for anything – it's just your preferences I am interested in. Before I do that, I'm going to tell you a bit about the features of the deals we're thinking about. Please read along on the screen with me.
Addition/ new question	<i>CONJ1</i>	<i>CONJ1</i>		Next I am going to show you some different deals for your <electricity / gas> supply. At each screen, could you please show which you prefer, by clicking on the box. Afterwards you will be asked a question about whether you would switch to that deal. You will be asked to look at a few of them, and I'll show you how to do them and then let you complete the questions on your own. Let's look at the first one together.



Type/ description	Question number	Question name	2017	2018
Addition/ new question	CONJ2	CONJ2		<p>If the deal you have just chosen was available, would you actually switch to it?</p> <p style="text-align: right;">Yes No (No don't know option)</p>
Addition/ new question	CONJ3	CONJ3		<p>I am now going to show you some other deals: please look at each one. (for the first one) Taking into consideration all the features of the deal shown, if it were available would you consider switching to it? (for the second one) Now take a look at this deal. Taking into consideration all the features of the deal shown, if it were available would you consider switching to it?</p> <p>Continue for remaining calibration questions</p> <p style="text-align: right;">1: Definitely would 2: Probably would 3: Not sure 4: Probably would not 5: Definitely would not 98: Refused 99: Don't know</p>
Addition/ new question	CONJ4	CONJ4		<p>INTERVIEWER: was the respondent willing and able to answer the above section?</p> <p style="text-align: right;">1. Yes 2. No – please disregard this section</p>



Type/ description	Question number	Question name	2017	2018
New intro text	QCAP	QCAP		<p>During the past year, the Government and Ofgem, the energy regulator, have capped energy prices for certain customers. This means that energy suppliers can charge those customers no more than the cap, though they can charge less if they want to. This capped rate is sometimes called a “safeguard tariff”.</p> <p>The price cap is different to a regular “fixed price” tariff you may have heard of. Fixed price tariffs vary from supplier to supplier, and offer fixed price energy for a set amount of time (e.g. one year).</p> <p>The price cap is the same rate across all suppliers and fixes prices indefinitely, rather than for a year or two.</p>
Addition/ new question	QCAP1	QCAP1		<p>Before today, had you heard that some energy prices for some customers have now been capped by government, and the energy regulator Ofgem?</p> <p>1:Yes 2:No 98:Refused 99:Don't know</p>
Addition/ new question	QCAP2	QCAP2		<p>Do you think that your energy prices are currently covered under the Government and Ofgem's price cap?</p> <p>1: Yes 2:No 98: Refused 99: Don't know</p>
Addition/ new question	Q133/	Q133/		<p>Do you receive any of the following tax credits or social security benefits? Please include those you receive personally or</p>



Type/ description	Question number	Question name	2017	2018
				jointly with your partner/spouse PLEASE SELECT ALL THAT APPLY <ol style="list-style-type: none"> 1. Not receiving any benefits or credits (SINGLE CODE ONLY) 2. Child Benefit 3. Child Tax Credit 4. Council Tax Benefit/Council Tax Reduction 5. Disability Living Allowance or Personal Independence Payment (PIP) 6. Employment and Support Allowance (ESA) 7. Guardian's Allowance 8. Housing Benefit 9. Incapacity Benefit 10. Income Support 11. Jobseeker's Allowance 12. State Retirement Pension (including Widow's Pension or Bereavement Allowance) 13. Pension Credit 14. Universal Credit 15. Working Tax Credit 16. Carers Allowance 17. Winter Fuel Allowance 18. Warm Home Discount 19. Other benefits (please specify) 98: Refused 99: Don't know



Type/ description	Question number	Question name	2017	2018
Amendment/ change to answer codes	Q133	Q133	G: Under £100 \ Under £400 \ Under £5,000 B: £100 - £199 \ £400 - £829 \ £5,000 - £9,999 F: £200 - £308 \ £830 - £1,333 \ £10,000 - £15,999 I: £309 - £389 \ £1,334 - £1,649 \ £16,000 - £19,999 D: £390 - £489 \ £1,650 - £2,099 \ £20,000 - £24,999 C: £490 - £679 \ £2,100 - £2,899 \ £25,000 - £34,999 A: £680 - £869 \ £2,900 - £3,749 \ £35,000 - £44,999 J: £870 - £1,149 \ £3,750 - £4,999 \ £45,000 - £59,999 H: £1,150 - £1,549 \ £5,000 - £6, 649 \ £60,000 - £79,999 E: £1,550 or over \ £6,650 or over \ £80,000 or over SPONTANEOUS ONLY: Nothing/no work or scheme 98: Refused 99: Don't know	G: Under £100 / Under £400 / Under £5,000 L: £101 and £160 / £401 - £640 / £5,050 - £8,000 B: £161 - £199 / £641 - £829 / £8,001 - £9,999 F: £200 - £240 / £830 - £961 / £10,000 - £12,000 K: £241 - £308 / £962 - £1333 / £12,001 - £15,999 I: £309 - £389 / £1,334 - £1,649 / £16,000 - £19,999 D: £390 - £489 / £1,650 - £2,099 / £20,000 - £24,999 C: £490 - £679 / £2,100 - £2,899 / £25,000 - £34,999 A: £680 - £869 / £2,900 - £3,749 / £35,000 - £44,999 J: £870 - £1,149 / £3,750 - £4,999 / £45,000 - £59,999 H: £1,150 - £1,549 / £5,000 - £6, 649 / £60,000 - £79,999 E: £1,550 or over / £6,650 or over / £80,000 or over SPONTANEOUS ONLY: Nothing/no work or scheme 98: Refused 99: Don't know
Addition/ new question	QPPM1	QPPM1		How often, over the last year, would you say that you have been temporarily disconnected from your (FIRST FUEL TYPE FROM Q4 gas / electricity / heat] supply because the meter ran out of credit before you topped it up? DO NOT READ OUT I. Gas II. Electricity 1: Once a week or more



Type/ description	Question number	Question name	2017	2018
				2: Two-three times a month 3: 6-12 times in the last year 4: 3-5 times in the last year 5: 1-2 times in the last year 6: Never 98: Refused 99: Don't know
Addition/ new question	QPPM2	QPPM2		And which is the longest period of time you have been disconnected from your [INSERT FUEL TYPE CODED @ QPPM1] supply in the last year? DO NOT READ OUT I. Gas II. Electricity 1: Less than an hour 2: Up to three hours 3: Up to seven hours 4: Up to twelve hours 5: Up to twenty-four hours 6: Up to two days 7: More than two days [ENTER NUMBER INTO BOX] 98: Refused 99: Don't know
Amendment/ change to answer codes	Proper	Proper	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	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) 6. Fully electric car/van 7. Hybrid car/van 8. Home energy storage (e.g. batteries in garage)



Type/ description	Question number	Question name	2017	2018
				9. Smart heating controls (e.g. Hive, Nest, Tado) 10. Smart bulbs / lamps / lighting controls (controlled from a phone/tablet) 97. Other (specify) 96. None of these 99. Don't know
Addition/ new question	<i>Properi</i>	<i>Properi</i>		How many fully electric vehicles/hybrid vehicles do you own? i. Fully electric vehicle ii. Hybrid vehicle ENTER NUMBER FOR EACH 96. None of these 99. Don't know 98. Refused
Amendment/ change to answer codes	<i>Socialgrade</i>	<i>Socialgrade</i>	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	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 98. Prefer not to say



Type/ description	Question number	Question name	2017	2018
Amendment/ change to question wording	Q136	Q136	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?	<p>Thank you for your help with this survey so far. We may wish to get back in touch with some people in the future. Which of these do you give us permission to do in the next 2 years?</p> <p>If you give your permission now, you can change your mind later. After 2 years, your contact details will be deleted and you will not be contacted again as a result of this survey.</p>
Amendment/ change to answer codes	Q136	Q136		<p>1: Yes 2: No</p> <p>1. Contact you again in relation to this specific research project should any questions arise 2. To be contacted again about taking part in follow-up research for Ofgem about these issues, either by GfK or another research agency appointed by Ofgem 3. Neither of these</p>

5.2 – Deletions made to questionnaire between 2017 – 2018

Question number	Question
SM2	Which of the statements below do you think most accurately describes who can install a smart meter?
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?
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?
175	And where did you see this?
Marital	Which of these best applies to you personally?

5.2 Segmentation question set

ASK ALL

Q1. To what extent do you agree or disagree with the following statements?

- 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 usually continue to search for an item until it reaches my expectations
- iv. I am usually among the first to try a new product when it appears on the market
- v. I always check bank or building society statements when I get them, including online

- 1. Agree strongly
- 2. Agree
- 3. Agree slightly
- 4. Neither agree nor disagree
- 5. Disagree slightly
- 6. Disagree
- 7. Disagree strongly
- 99. Don't know/Refused

ASK ALL

Q2. To what extent do you agree or disagree with the following statements?

- 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. Switching is a hassle that I've not got time for
- iv. If I was going to change energy supplier, I would look for a supplier who offered me extra rewards
- v. 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
- 99. Don't know/Refused

ASK ALL

Q3. How confident or unconfident do you feel about doing things related to energy suppliers?

- i. Comparing the different energy deals available

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

ASK ALL

Q4a/b/c. To what extent do you trust or distrust your gas/electricity/energy supplier to...?

- i. Treat you fairly in their dealings with you
- ii. Charge you a fair price for your gas/electricity/energy

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

5.3 Conjoint Grid

5.3.1 Non-PPM consumers

Conjoint attributes and levels (non-PPM consumers)



Attribute	Values						
Supplier	Stick with your current supplier	Move to supplier from Group A	Move to supplier from Group B	Move to supplier from Group C	<ul style="list-style-type: none"> Group A: British Gas, EDF, EON, nPower, Scottish Power, and SSE Group B: Cooperative Energy, Ovo, First Utility, Utility Warehouse and Utilita Group C: Flow energy, Bulb energy, Tonik, Avro and Economy Energy 		
Savings	5%	10%	15%	20%	25%	30%	<ul style="list-style-type: none"> Calculated based on actual bill Shown as a % and £ reduction
Quality of service (out of 5 stars)	1 star	3 stars	5 stars				<ul style="list-style-type: none"> Introduced as a Trustpilot star rating
Payment method	Direct Debit	Pay on receipt of bills					
Online management	Online management	Receive paper bills					
Whether fixed or variable rate	Variable rate	1 year fixed rate	2 year fixed rate	3 year fixed rate			
Exit fee	No exit fee	£30 per fuel exit fee					<ul style="list-style-type: none"> Exit fees not shown if variable rate tariff shown

5.3.2 PPM consumers

Conjoint attributes and levels (PPM consumers)



Attribute	Values						
Supplier	Stick with your current supplier	Move to supplier from Group A	Move to supplier from Group B	Move to supplier from Group C	<ul style="list-style-type: none"> Group A: British Gas, EDF, EON, nPower, Scottish Power, and SSE Group B: Cooperative Energy, Ovo, First Utility, Utility Warehouse and Utilita Group C: Flow energy, Bulb energy, Tonik, Avro and Economy Energy 		
Savings	5%	10%	15%	20%	25%	30%	<ul style="list-style-type: none"> Calculated based on actual bill Shown as a % and £ reduction
Quality of service (out of 5 stars)	1 star	3 stars	5 stars				<ul style="list-style-type: none"> Introduced as a Trustpilot star rating
Payment method	Pre-payment meter					<ul style="list-style-type: none"> PPM consumers were only offered PPM as a payment method 	
Online management	Online management	Receive paper bills					
Whether fixed or variable rate	Variable rate	1 year fixed rate	2 year fixed rate	3 year fixed rate			
Exit fee	No exit fee	£30 per fuel exit fee					<ul style="list-style-type: none"> Exit fees not shown if variable rate tariff shown

5.4 Full 2018 Questionnaire

Base: F0: All respondents

INTRO1

READ OUT

I would now like to ask you some questions about gas and electricity suppliers on behalf of Ofgem, the independent energy regulator for Great Britain.

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

Base: F0: All respondents

Q1

SINGLE CODE

SHOW SCREEN

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

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

Base: F1: Has gas and/or electricity supply

Q2

SINGLE CODE

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

INTERVIEWER INSTRUCTION: For those who rent properties where the landlord organises and pays the energy bills, code as 'No'

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

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

Intro2

READ OUT

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

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

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

Empow

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

SHOW SCREEN

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

- i. As soon as I see a problem or challenge I start looking for possible solutions
- ii. I am able to follow through with things once I've made up my mind to do something
- iv. I usually continue to search for an item until it reaches my expectations
- vii. I am usually among the first to try a new product when it appears on the market
- 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 electricity supply and responsible for it

QBB1

SINGLE CODE

Now, thinking about something completely different for a moment, we're interested in how you might deal with some situations. Please imagine that you have been offered some money, and are given the option of receiving a smaller amount now or a larger amount in the future.

SHOW SCREEN

Would you prefer £100 in cash today, or £200 in cash guaranteed in one month?

- 1: £100 today
- 2: £200 in one month
- 98: Refused

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

QBB2

SINGLE CODE

SHOW SCREEN

And would you prefer £100 in cash guaranteed in 6 months, or £200 in cash guaranteed in 7 months?

- 1: £100 in 6 months
- 2: £200 in 7 months
- 98: Refused

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

BB3

SINGLE CODE FOR EACH STATEMENT

ALTERNATE ORDER OF ANSWER LIST

ONCE RESPONDENT HAS ANSWERED 'NO, I WOULDN'T TAKE THE GAMBLE', CONTINUE TO INTRO 3

SHOW SCREEN

Now, imagine someone invites you to take a bet on a simple "heads or tails" coin toss. Would you take the following bets?

- i. If the coin turns up heads then you lose **£2**; if the coin turns up tails then you win **£6**
- ii. If the coin turns up heads then you lose **£3**; if the coin turns up tails then you win **£6**
- iii. If the coin turns up heads then you lose **£4**; if the coin turns up tails then you win **£6**
- iv. If the coin turns up heads then you lose **£5**; if the coin turns up tails then you win **£6**



- v. If the coin turns up heads then you lose £6; if the coin turns up tails then you win £6
- vi. If the coin turns up heads then you lose £7; if the coin turns up tails then you win £6

- 1. Yes, I would take this bet
- 2. No, I wouldn't take the bet
- 98. Prefer not to say

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

Intro3

READ OUT

Now some questions specifically about energy suppliers

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

Q150

SINGLE CODE

SHOW SCREEN

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

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

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

Q3

SINGLE CODE

SHOW SCREEN

Who is your current gas supplier?

- | | |
|-------------------------------------|---------------------------------|
| British Gas | E (Gas and Electricity) Limited |
| E.ON | Ebico |
| EDF | Economy Energy |
| Npower | Ecotricity |
| SSE | Effortless Energy |
| Scottish Power | EnergySW |
| | Engie |
| Affect Energy | Entice Energy Supply Limited |
| Angelic Energy | ESB Energy limited |
| Avantigas On | Eversmart |
| Avid Energy | Extra Energy Supply Limited |
| Avro Energy | Fairerpower |
| Axis Telecom | First Utility |
| Better Energy | Fischer Energy |
| Boost | Flow Energy |
| Breeze Energy supply | Future Energy |
| Brighter World Energy | Gen4U |
| Bristol Energy & Technology Service | Glide |
| Bulb energy | Gnergy |
| Cardiff Energy Supply | Good Energy |
| Co-operative Energy Limited | Green Energy |
| Daligas | Green Network Energy Limited |



Green Star Energy	Robin Hood Energy Limited
Hebrides	Sainsbury's Energy
Igloo Energy	Simple Gas
Iresa	Snowdrop Energy
iSupply Energy	So Energy
Leccy	Solarplicity Supply Limited
M&S Energy	Southend Energy
Nabuh Energy	Spark Energy
Octopus Energy Limited	The Energy Deal
Oink	Together Energy
OneSelect limited	Tonik
Our Power Energy Supply Ltd	Toto Energy Limited
Out fox the market	UK NATIONAL GAS LTD
Ovo	Utilita
People's Energy	Utility Warehouse
Peterborough Energy	White Rose Energy
Places for People Energy	Zebra Power
Powershop	Zog Energy
Pozitive Energy	Other - PEN WRITE IN
Pure Planet Limited	Refused
Ram Energy	Don't know
Riadace	

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

Q4

SINGLE CODE

SHOW SCREEN

Who is your current electricity supplier?

British Gas	Hebriides
E.ON	Igloo Energy
EDF	IRESA Limited
Npower	iSupply Energy
SSE	Leccy
Scottish Power	Logicor Energy
Affect Energy	M&S Energy
Angelic Energy	Nabuh Energy
Avid Energy	Octopus Energy Limited
Avro Energy	Oink
Axis Telecom	OneSelect Limited
Boost	Our Power Energy Supply Ltd
Breeze Energy Supply	Out fox the market
Brighter World Energy	Ovo
Brilliant Energy Supply Limited	People's Energy
Bristol Energy & Technology Service	Peterborough Energy
Bulb energy	Places for People Energy
Co-operative Energy Limited	Powershop
E (Gas and Electricity) Limited	Positive Energy
Ebico	Pure Planet Limited
Economy Energy	Ram Energy
Ecotricity	Riadace
Effortless Energy	Robin Hood Energy Limited
EnergySW	Sainsbury's Energy
Engie	Simple Gas
Ephase	Snowdrop Energy
ESB Energy Limited	So Energy
Estroga Energy	Solarplicity Supply Limited
Eversmart	Southend Energy
Extra Energy Supply Limited	Spark Energy
Fairerpower	The Energy Deal
First Utility	Together Energy
Fischer Energy	Tonik
Flow Energy	Toto Energy Limited
Future Energy	Utilita
Gen4U	Utility Warehouse
Glide	White Rose Energy
Gnergy	Zebra Power
Good Energy	Zog Energy
Green Energy	Other - PEN WRITE IN
Green Network Energy Limited	Refused
Green Star Energy	Don't know

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

Q151

SINGLE CODE

SHOW SCREEN

Who is your current gas and electricity supplier?

British Gas	Ovo
E.ON	People's Energy
EDF	Peterborough Energy
Npower	Places for People Energy
SSE	Powershop
Scottish Power	Pozitive Energy
	Pure Planet Limited
Affect Energy	Ram Energy
Angelic Energy	Riadace
Avid Energy	Robin Hood Energy Limited
Avro Energy	Sainsbury's Energy
Axis Telecom	Simple Gas
	Snowdrop Energy
Boost	So Energy
Breeze Energy Supply	Solarplicity Supply Limited
Brighter World Energy	Southend Energy
Bristol Energy & Technology Service	Spark Energy
Bulb energy	The Energy Deal
Co-operative Energy Limited	Together Energy
E (Gas and Electricity) Limited	Tonik
Ebico	Toto Energy Limited
Economy Energy	Utilita
Ecotricity	Utility Warehouse
Effortless Energy	White Rose Energy
EnergySW	Zebra Power
Engie	Other - PEN WRITE IN
ESB Energy Limited	Refused
Eversmart	Don't know
Extra Energy Supply Limited	
Fairerpower	
First Utility	
Fischer Energy	
Flow Energy	
Future Energy (Supply)	
Gen4U	
Glide	
Gnergy	
Good Energy	
Green Energy	
Green Network Energy Limited	
Green Star Energy	
Hebrides	
Igloo Energy	
IRESA Limited	
iSupply Energy	
Leccy	
M&S Energy	
Nabuh Energy	
Octopus Energy Limited	
Oink	
OneSelect Limited	
Our Power Energy Supply Ltd	
Out fox the market	

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

Q5

SINGLE CODE

SHOW SCREEN

How do you pay for your gas?

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

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

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

Q6

SINGLE CODE

SHOW SCREEN

How do you pay for your electricity?

INTERVIEWER INSTRUCTION: Check if on dual fuel deal

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

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

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

PayTy

SINGLE CODE

TEXT SUBSTITUTION: NOTE THERE ARE TWO IN THE QUESTION

If codes 1 or 2 at Q5& Q6 <pay a single direct debit do two direct debits come out of your account>

If code 3 at Q5&Q6 <receive a single bill are they billed separately>

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

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

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

Q8

CAPTURE NUMERIC AMOUNT

ALLOW DK AND REFUSED OPTIONS

MIN £1; MAX £3000

SHOW SCREEN

Approximately how much do you spend on home energy? That is electricity and mains gas if you have it.

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

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

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

Enter number

Base: F42: All who spend something on home energy

Q9

SINGLE CODE

Interviewer code, was that...

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

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: F42: All who spend something on home energy

Dummbill

SCRIPTING: PLEASE CALCULATE FOR EACH RESPONDENT ANNUAL BILL AMOUNT BASED ON ABOVE, AND STORE FOR CONJOINT. IF DUMMBILL>3000, BRING UP CHECK QUESTION

From our calculation, this would make your energy bill £<value> per year. Is this right

Yes - Continue
 No – go back to Q8 and check amounts
 (No don't know option)

Base: Fxx: F6: Has different gas and electricity suppliers, or not sure if the same AND able to provide energy bill amount at Q8

Eleconly

You said a moment ago that your total energy bill is <show amount from Q8> <if Q9=1-7 show period from Q9>.

How much of that is spent on **electricity** <if Q9=1-7 show period from Q9>?

ENTER NUMBER: CAPI check number is lower than given at Q8
 99. Don't know

Base: Fxy: Eleconly <> Don't know

Gasonly

So that means you spend (dummbill – dummelec) on gas <if Q9=1-7 show period from Q9>. Does that sound about right?

Yes –calculate dummgas
 No – return to Eleconly and check figures
 99 Don't know

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

Intro4

TEXT SUBSTITUTION

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

gas = F3

electricity = F4

gas and electricity = F5

READ OUT

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

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

Q153

SINGLE CODE

ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

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

1: Completely
 2: Fairly
 3: Not very
 4: Not at all

98: Refused
99: Don't know

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

Q89

SINGLE CODE
ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

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

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

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

Q90

SINGLE CODE
ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

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

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

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

Q10

SINGLE CODE
TEXT SUBSTITUTION

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

gas = F3

electricity = F4

gas and electricity = F5

Display response codes based on following:

1. Yes, gas only = F3 or F5

2. Yes, electricity only = F4 or F5

3. Yes gas and electricity = F5

SHOW SCREEN

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

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

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

Q11

SINGLE CODE

TEXT SUBSTITUTION

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

gas = F3

electricity = F4

gas and electricity = F5

Display response codes based on following:

1. Yes, gas only = F3 or F5

2. Yes, electricity only = F4 or F5

3. Yes gas and electricity = F5

SHOW SCREEN

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

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

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

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

Q13

SINGLE CODE

SHOW SCREEN

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

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

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

Intro5

READ OUT

Now a few questions about smart meters.

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

SM1

SINGLE CODE

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

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

Base: F111 Aware of smart meters

SM3

MULTIPLE CODE
 ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

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

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

Base: F111 Aware of smart meters

SM4

SINGLE CODE

Do you have a smart meter?

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

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

SM6

SHOW AS GRID SINGLE CODE PER STATEMENT

SHOW SCREEN

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

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

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

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

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

Intro6

READ OUT

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

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

Q14

MULTIPLE CODE
ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

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

INTERVIEWER INSTRUCTION: Multiple code as many as apply

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

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

Q21

SINGLE CODE

SHOW SCREEN

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

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

Base: F112 Ever switched gas supplier

Q138

SINGLE CODE

SHOW SCREEN

When did you last switch gas supplier?

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

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

Q22

SINGLE CODE

SHOW SCREEN

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

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

Base: F113 Ever switched electricity supplier

Q139

SINGLE CODE

SHOW SCREEN

When did you last switch electricity supplier?

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

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

Q154

SINGLE CODE

SHOW SCREEN

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

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

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

TmesG

SINGLE CODE

SHOW SCREEN

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

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

Base: F115 Ever switched gas tariff

WhnSG

SINGLE CODE

SHOW SCREEN

When did you last switch gas tariff?

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

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

TmesE

SINGLE CODE

SHOW SCREEN

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

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

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

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

Base: F116 Ever switched electricity tariff

WhnSE

SINGLE CODE

SHOW SCREEN

When did you last switch electricity tariff?

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

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

Switch

SINGLE CODE

SHOW SCREEN

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

The last time I switched, I switched...

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

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

ChngG

MULTIPLE CODE
ALTERNATE ORDER OF ANSWER LIST

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

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

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

ChngE

MULTIPLE CODE
ALTERNATE ORDER OF ANSWER LIST

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

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

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

Dummset

MULTIPLE CODE: SET AS FOLLOWS:

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

SET PRIORITY OF WHICH RECENT EXPERIENCE TO ASK ABOUT

IF MULTIPLE CODED, PRIORITY IS:

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

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

Set selected variable as Dumm1

QUESTION NOT TO BE ASKED

- PAST 12 MONTHS:
- 1: switched gas supplier
 - 2: switched electricity supplier
 - 3: switched gas and electricity suppliers together
 - 4: switched gas tariff
 - 5: switched electricity tariff
 - 6: switched gas and electricity tariff together
 - 7: compared gas suppliers
 - 8: compared gas tariffs offered by your own supplier
 - 9: compared electricity suppliers
 - 10: compared electricity tariffs offered by your own supplier
 - 96: None of these

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

Intro6b

TURN SCREEN AWAY FROM RESPONDENT UNTIL TOLD OTHERWISE

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

Intro7A

SUBSTITUTE FROM DUMM1

READ OUT

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

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

Q160

MULTIPLE CODE

MAX 3 ANSWERS

SUBSTITUTE IN FROM DUMM1

DO NOT PROMPT

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

IF 'Saving money' PROBE TO PRECODES

PROBE: What other things were your priorities?

CODE UP TO 3 RESPONSES

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

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

Base: F119 Gave more than one response at Q160

MainP

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

DO NOT PROMPT

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

Was it...

READ OUT

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

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

Q161

MULTIPLE CODE
MAX 3 ANSWERS
RECORD ORDER
SUBSTITUTE IN FROM DUMM1

DO NOT PROMPT

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

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

INTERVIEWER INSTRUCTION: Multiple code up to 3 responses

- 1 I received a bill or direct debit \ prepayment statement from my supplier
- 2 I received a price increase notice from my supplier
- 3 I received an end of fixed term tariff notice from my supplier
- 4 I received an annual summary or review from my supplier
- 5 I received information about my energy consumption from my supplier
- 5 I received a 'dead notice' from my supplier about my tariff
- 6 I saw a message on a communication from my supplier about how I could make savings by changing tariff or payment method with my current supplier

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

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

Q165

MULTIPLE CODE
SUBSTITUTE IN FROM DUMM1

DO NOT PROMPT

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

INTERVIEWER INSTRUCTION: Multiple code as many as apply

- 1: I used an online\website price comparison service (e.g. USwitch, Money Supermarket)
- 2: Using an automated switching service (e.g. Flipper, Voltz, Swuto, Energy Scanner)
- 3: I rang my supplier
- 4: I rang other suppliers
- 5: I looked at my supplier's own website
- 6: I looked at the websites of other suppliers
- 7: I spoke to a supplier salesperson in the street\shopping centre \ public place
- 8: A friend or family member told me about it
- 9: A supplier salesperson knocked at my door
- 10: A new supplier phoned me
- 11: I phoned a comparison service
- 12: Written communication or marketing material from supplier
- 13: Through a collective (group) switching campaign organised by a third party (e.g. council\charity\housing association \ Big Switch, ready to switch etc.)
- 14. Advertising (e.g. TV, radio, newspaper or online advert)
- 15. Article in the press (newspaper, magazine or online)
- 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

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

NotSh

SHOW AS GRID

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

TEXT SUBSTITUTION:

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

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

DO NOT PROMPT

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

CHOOSE ALL THAT APPLY. CODE FIRST MENTION THEN OTHER MENTIONS

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

Cost/price

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

Quality / reliability – existing supplier

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

Existing supplier characteristics

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

Additional features / services of existing supplier

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

Switching to alternative

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

General

20. Not interested
21. Too complicated
22. All suppliers are much the same/no difference
23. Too much hassle/effort
24. Wasn't aware you could switch/change
25. Don't know how to do it

96. Nothing specific
97. Other (specify)
99. Don't know
98. Prefer not to say

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

Recom

MULTIPLE CODE

SHOW SCREEN

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

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

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

96: None

98: Refused

99: Don't know

Base: f120 Recommendations made at Recom

Intro7A

TURN SCREEN AWAY FROM RESPONDENT UNTIL TOLD OTHERWISE

Base: f120 Recommendations made at Recom

Whoma

MULTIPLE CODE

DO NOT PROMPT

Who made those recommendations?

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

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

Intro8

READ OUT

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

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

Intro9

READ OUT AND SHOW SCREEN

The next question is about different types of tariffs.

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

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

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

SwitTa

SINGLE CODE

ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

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

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

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

Intro9A

TURN SCREEN AWAY FROM RESPONDENT UNTIL TOLD OTHERWISE

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

Q156

SINGLE CODE

DO NOT PROMPT

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

INTERVIEWER INSTRUCTION: PROBE TO PRECODES

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

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

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

PCWSw

SINGLE CODE

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

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

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

HelpS

MULTIPLE CODE

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

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

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

Q157

SINGLE CODE
ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

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

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

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

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

Q158

SINGLE CODE
ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

Thinking of the last time you <answer from Dumm1>, taking into account every part of the process, from considering switching to the switch completion, how much do you agree or disagree with the statement?

"I found the process of switching easy"

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

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

Q159

SINGLE CODE

To what extent do you agree or disagree with the following statement:

“The last time I switched supplier, I had sufficient control over the date I would actually be switched over”

- 1: Agree strongly
- 2: Agree slightly
- 3: Neither agree or disagree
- 4: Disagree slightly
- 5: Disagree strongly
- 98: Refused
- 99: Don't know

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

Q166

MULTIPLE CODE

SHOW SCREEN

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

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

Base: F125 Thought they would save money from the switch

MoreP

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

SHOW SCREEN

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

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

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

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

ENTER NUMBER

Base: F125 Thought they would save money from the switch

Frequ

SINGLE CODE



Interviewer code, is that...

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

Base: F125 Thought they would save money from the switch

Apprx2
SINGLE CODE

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

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

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

OwedM
SINGLE CODE

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

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

Base: F126 Owed balance from old supplier when last switched

MonRe
SINGLE CODE
ALTERNATE ORDER OF ANSWER LIST

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

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

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

Intro9B

TURN SCREEN AWAY FROM RESPONDENT UNTIL TOLD OTHERWISE

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

Q122

MULTIPLE CODE
MAX 3 ANSWERS

If you were to switch supplier or tariff, what would be your priorities when choosing a new deal?

IF 'Saving money' PROBE TO PRECODES

PROBE: What other priorities would you have?

CODE UP TO 3 RESPONSES

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

Base: F121 Gave more than one response at Q122

PrioM

SINGLE CODE
SHOW ONLY ANSWERS GIVEN AT Q122

And which of these would be your main priority?

Would it be...

READ OUT

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

99: Don't know

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

Q123

SINGLE CODE

ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

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

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

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

Q124

SINGLE CODE

ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

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

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

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

Q125

SINGLE CODE

ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

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

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

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

Tried

SINGLE CODE

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

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

Base: F106 Tried to switch but unable to

Descr
MULTIPLE CODE
RANDOMISE

SHOW SCREEN

Which, if any of these describe what happened?

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

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

Intro3c

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

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

Q73
SINGLE CODE
ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

Thinking about the range of different tariffs available to you from energy suppliers, would you say that you have...?

1: Too much choice
2: About the right amount of choice
3: Too little choice
98: Refused

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

Q145

SINGLE CODE
ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

How easy or difficult do you believe it is to compare different tariffs for electricity or gas?

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

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

PCWSt

SINGLE CODE PER STATEMENT
RANDOMISE STATEMENTS

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

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

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

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

Intro3d

SHOW SCREEN

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

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

Q121

SINGLE CODE FOR EACH STATEMENT
RANDOMISE STATEMENTS

SHOW SCREEN

How much do you agree or disagree...?

- i) Switching is a hassle that I've not got time for
- ii) I worry that if I switch things will go wrong
- iv) Switching energy suppliers takes too long
- vi) It's too hard to work out whether I would save or not if I switched

- 1: Agree strongly
- 2: Tend to agree
- 3: Neither agree nor disagree
- 4: Tend to disagree

5: Disagree strongly
98: Refused
99: Don't know

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

Intro3d

TURN SCREEN AWAY FROM RESPONDENT UNTIL TOLD OTHERWISE

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

Risks

MULTIPLE CODE
RANDOMISE
RECORD OTHER

DO NOT PROMPT

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

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

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

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

LongS

NUMERIC
RANGE
Days 1-365
Weeks: 1 - 52

If someone was to switch to a new energy supplier, how long do you think the process takes from the time that they ask to switch, to the time that the new supplier starts to supply their energy?

You can answer in days or weeks

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

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

Conf2

SINGLE CODE FOR EACH QUESTION
RANDOMISE

SHOW SCREEN

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

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

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

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

CAPI: CALCULATE AMOUNT OF FUEL BILL

- IF DUAL FUEL (Q1=1&2 AND Q150=1), TAKE **TOTAL ENERGY BILL FROM DUMMBILL**
- IF ELECTRICITY ONLY (Q1=1 AND Q1<>2) TAKE **TOTAL ELECTRICITY BILL FROM DUMMBILL**
- IF GAS ONLY (Q1=2 AND Q1<>1) TAKE **TOTAL GAS BILL FROM DUMMBILL**
- IF HAS ELECTRICITY AND GAS BUT FROM DIFFERENT SUPPLIERS (Q1=1&2 AND Q150=2|98|99) TAKE **RELEVANT BILL FROM DUMMELEC OR DUMMGAS**

IF UNABLE TO CALCULATE DUMMBILL OR DUMMELEC, USE AVERAGE BILL AMOUNT OF £1,000 ANNUALLY

SELECT WHICH TO ASK ABOUT – SAVE TO DUMMY CALLED CONJSET. SAVE CONJSET FOR LATER ANALYSIS

- If dual fuel (Q1=1&2 AND Q150=1)
 - If none PPM (Q5=1|2|3|5|6|7|99 AND Q6=1|2|3|5|6|7|99) ask about **energy non-PPM (conjset=1)**
 - If both PPM (Q5=4 AND Q6=4), ask about **energy PPM (conjset=2)**
- If electricity only (Q1=1 AND Q1<>2)
 - If non-PPM (Q6=1|2|3|5|6|7|99) ask about **electricity non-PPM (conjset=3)**
 - If PPM (Q6=4) ask about **electricity PPM (conjset=4)**
- If gas only (Q1=2 AND Q1<>1)
 - If non-PPM (Q5 =1|2|3|5|6|7|99) ask about **gas non-PPM (conjset=5)**
 - If PPM (Q5=4) ask about **gas PPM (conjset=6)**
- If electricity and gas from different suppliers (Q1=1&2 AND Q150=2|98|99)
 - If electricity PPM not gas (Q5=1|2|3|5|6|7|99 AND Q6=4) ask about **gas non-PPM (conjset=7)**
 - If gas PPM not electricity (Q5=4 AND Q6=1|2|3|5|6|7|99) ask about **electricity non-PPM (conjset=8)**
 - If both PPM (Q5=4 and Q6=4), ask about **electricity PPM (conjset=9)**
 - If neither PPM (Q5 = 1/2/3/5/6/7/98/99 AND Q6 = 1/2/3/5/6/7/98/99) ask about **electricity non PPM (conjset=3)**

All others who do not fit any of these criteria (e.g. other payment methods at Q5|Q6, refused payment methods), route out of conjoint

Base: F143: All respondents answering conjoint

SHOW SCREEN

Next I would like to ask you some questions about changes which you could make to your <conjset = 1|2 “energy” / conjset=3|4|8|9 “electricity” / conjset=5|6|7 “gas”> supply.

I am going to show you some examples of <conjset = 1|2 “energy” / conjset=3|4|8|9 “electricity” / conjset=5|6|7 “gas”> deals, and ask you which you’d prefer. Don’t worry, I’m not going to try to sign you up for anything – it’s just your preferences I am interested in.

Before I do that, I’m going to tell you a bit about the features of the deals we’re thinking about. Please read along on the screen with me.

(NEW SCREEN)

HAND OVER CARD C1-C7 (Based on:)

- Get Card C1 if:
- (Conjset=1 or 2) & (Q151>6 including don’t know), or
- (conjset=3 or 4 or 8 or 9) and (Q4>6 including don’t know), or
- (conjset = 5 or 6 or 7) and (Q3>6 including don’t know)
- Get Card C2 if:
- (Conjset=1 or 2) & (Q151=1), or
- (conjset=3 or 4 or 8 or 9) and (Q4=1), or
- (conjset = 5 or 6 or 7) and (Q3=1)
- Get Card C3 if:
- (Conjset=1 or 2) & (Q151=2), or
- (conjset=3 or 4 or 8 or 9) and (Q4=2), or
- (conjset = 5 or 6 or 7) and (Q3=2)
- Get Card C4 if:
- (Conjset=1 or 2) & (Q151=3), or
- (conjset=3 or 4 or 8 or 9) and (Q4=3), or
- (conjset = 5 or 6 or 7) and (Q3=3)
- Get Card C5 if:
- (Conjset=1 or 2) & (Q151=4), or
- (conjset=3 or 4 or 8 or 9) and (Q4=4), or
- (conjset = 5 or 6 or 7) and (Q3=4)
- Get Card C6 if:
- (Conjset=1 or 2) & (Q151=5), or
- (conjset=3 or 4 or 8 or 9) and (Q4=5), or
- (conjset = 5 or 6 or 7) and (Q3=5)
- Get Card C7 if:
- (Conjset=1 or 2) & (Q151=6), or
- (conjset=3 or 4 or 8 or 9) and (Q4=6), or

- (conjset = 5 or 6 or 7) and (Q3=6)
-
-
- (For information, cards will show:
-
- C1 = all providers
- C2 = no British Gas
- C3 = no E.ON
- C4 = no EDF
- C5 = no Npower
- C6 = no SSE
- C7 = no Scottish Power)

◆ Supplier

This is the company who provides your <conjset = 1|2 “energy” / conjset=3|4|8|9 “electricity” / conjset=5|6|7 “gas”>. We’ll ask you to consider changing your deal with your current supplier, or moving to a different supplier.

We don’t need to know precisely which supplier you’d want to change to, but we have put them into groups by way of example.

The groups are identified by letters.

- Group A includes British Gas, EDF, EON, nPower, Scottish Power, and SSE
- Group B includes Cooperative Energy, Ovo, First Utility, Utility Warehouse and Utilita
- Group C includes Flow energy, Bulb energy, Tonik, Avro and Economy Energy

(NEW SCREEN)

◆ Savings

<IF ABLE TO CALCULATE BILL AMOUNT AT DUMMBILL DUMMELEC OR DUMMGAS AS APPLICABLE >

We will show you different levels of savings, based on the amount you’ve told us you are spending on your <based on conjset energy/electricity/gas> bills. This will be shown as the amount you could save per year, and also as the proportion you could save. Remember, the size of bill savings will depend on the amount of <based on conjset energy/electricity/gas> you use

<IF UNABLE TO CALCULATE BILL AMOUNT AT DUMMBILL DUMMELEC OR DUMMGAS AS APPLICABLE>

We will show you different levels of savings, based on the average <based on conjset energy/electricity/gas> bill across the country. This will be shown as the amount that could be saved per year, and also the proportion that could be saved. Remember, the size of bill savings will depend on the amount of <based on conjset energy/electricity/gas> used.

(NEW SCREEN)

◆ Quality of service

We'll ask you to consider moving to suppliers with different levels of customer service.

The measure we'll show you is a Trustpilot score out of 5 stars, where 5 stars is the best score.

Trustpilot is a reviews site where customers rate their energy suppliers based on the quality of their service – this would cover things like how many complaints they get, how they deal with customer issues, and other things like that.

(NEW SCREEN)

◆ Payment method

<If conjset = 2 | 4 | 6 | 9> This is how you pay for your energy – in your case, this is through the prepayment meter in your property.

< If conjset = 1 | 3 | 5 | 7 | 8> People can pay for energy in different ways. These include payment on receipt of your energy bill, or paying regularly by direct debit.

(NEW SCREEN)

◆ Bill type

Whether you would prefer to have paper bills through the post, or to wholly manage your bills and statements online.

(NEW SCREEN)

◆ Whether fixed or variable tariff

Fixed tariffs mean prices are locked at a fixed amount, for a fixed time period (e.g. 12 months) , after which you will usually be rolled onto your supplier's variable or standard rate. We will show you different lengths of fixed tariffs.

On a variable rate, (or standard tariff), prices can fluctuate, and your contract doesn't have a fixed end date. You would stay on this tariff unless you make a choice to change it

(NEW SCREEN)

◆ Exit fees

Exit fees are fees you get charged if you leave a fixed term deal before the time is up. For example, if you pick an energy contract that is fixed for 12 months, but then decide to leave that supplier after 8 months, you may be charged an exit fee).

(NEW SCREEN)

CONJ1

SINGLE
SHOW AS GRID

Next I am going to show you some different deals for your <electricity / gas> supply. At each screen, could you please show which you prefer, by clicking on the box. Afterwards you will be asked a question about whether you would switch to that deal.

You will be asked to look at a few of them, and I'll show you how to do them and then let you complete the questions on your own. Let's look at the first one together.

REFER TO CARD C1-C7 <based on which shown> WHEN ANSWERING QUESTION
INTERVIEWER: CHECK RESPONDENT IS HAPPY WITH THE FIRST SCREEN AND HOW THEY SHOULD COMPLETE IT BEFORE HANDING COMPUTER TO RESPONDENT TO COMPLETE CONJOINT SECTION
NB ANSWERS FROM THE FIRST SCREEN WILL BE USED

Attribute	Values					
	1	2	3	4	5	6
Supplier	Stick with your current supplier	Move to one of the suppliers from Group A	Move to one of the suppliers from Group B	Move to one of the suppliers from Group C		
Savings	(Calculated based on actual electricity/gas/energy bill) Reduction of:					
	5%	10%	15%	20%	25%	30%
	SCRIPTING: Show reduction as % and as £ amount based on energy bill, or if said don't know amount of energy bill work on average bill amount of £tbc per year (and this will be stated in the introduction)					
Quality of service (out of 5 stars)	1 star	3 stars	5 stars			
Payment method	SCRIPTING: If conjset = 2 4 6 9 always show Prepayment Meter in grid					
	SCRIPTING: If conjset = 1 3 5 7 8 show two options:					
	Direct Debit	Pay on receipt of bills				
Online management	Online account management, no paper bills	Receive paper bills				
Green tariff	Yes	No				
Whether fixed or variable rate	Variable rate	1 year fixed rate	2 year fixed rate	3 year fixed rate		
Exit fee	There is no fee to leave this plan early	You'll pay £30 per fuel to leave this plan early				

Please see attached spreadsheet for grid and permutations: These are:

Each grid shows 4 deals
 Respondents are shown 7 iterations, and asked to choose.
 After each choice has been made, bring up question:

CONJ2

SINGLE
SHOW AS GRID

If the deal you have just chosen was available, would you actually switch to it?

Yes
No
(No don't know option)

Base: F143: all answering conjoint

I am now going to show you some other deals: please look at each one.

(NEW SCREEN)

CONJ3

SINGLE CODE
ALTERNATE ORDER OF ANSWER LIST

(for the first one) Taking into consideration all the features of the deal shown, if it were available would you consider switching to it?

(for the second one) Now take a look at this deal. Taking into consideration all the features of the deal shown, if it were available would you consider switching to it?

Continue for remaining calibration questions

1: Definitely would
2: Probably would
3: Not sure
4: Probably would not
5: Definitely would not
98: Refused
99: Don't know

PLEASE HAND COMPUTER BACK TO INTERVIEWER

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

INTRO7

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

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

Q60
SINGLE CODE FOR EACH QUESTION
RANDOMISE

SHOW SCREEN AND READ OUT STATEMENT

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

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

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

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

Q64

SINGLE CODE FOR EACH QUESTION
RANDOMISE

SHOW SCREEN AND READ OUT STATEMENT

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

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

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

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

Q68

SINGLE CODE FOR EACH QUESTION
RANDOMISE

SHOW SCREEN AND READ OUT STATEMENT

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

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

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

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

SpAtt

SINGLE CODE FOR EACH QUESTION
RANDOMISE

SHOW SCREEN

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

ii. I would be wary of using an energy supplier I have never heard of

iii. If I was going to change energy supplier, I would look for a supplier who offered me extra rewards

iv. I would be happy to pay slightly more for my energy if my supplier offered me better customer service

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

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

Q59

SINGLE CODE

ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

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

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

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

Q63

SINGLE CODE

ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

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

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

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

Q67

SINGLE CODE

ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

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

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

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

Intro8a

Now thinking about complaints

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

Q76

SINGLE CODE

SHOW SCREEN

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

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

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

Q81

SINGLE CODE

SHOW SCREEN

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

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

Base: F127 Cause to complain but did not complain

NotCm

MULTIPLE CODE

SHOW SCREEN

Why did you not make a complaint at that time?

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

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

Intro8b

Now thinking about contact with energy suppliers more generally

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

Q82

MULTIPLE CODE

SHOW SCREEN - MULTIPLE CHOICE

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

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

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

INTRO9

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

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

Repre

MULTIPLE CODE

SHOW SCREEN

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

CODE ALL THAT APPLY

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

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

Words

MULTIPLE CODE

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

- 1. Being sold to by a friend (CODE 6)

2. Being sold to at the door (CODE 3)
 3. In shopping centre (CODE 4)
 4. Unsolicited phone call (CODE 1)
 5. Call you made to them (CODE 2)
 6. Webchat (CODE 5)
 TEXT SUBSTITUTION BASED ON REPRES, AS FOLLOWS:
 GENERIC INTRO Thinking about the last time...
 THEN SPECIFIC WORDING DEPENDING ON ANSWER AT REPRES
 1. a supplier called you to sell you an energy deal...
 2. you called a supplier and they tried to sell you an energy deal...
 3. a supplier salesperson came to your door to sell you an energy deal...
 4. a supplier salesperson tried to sell you an energy deal in the street...
 5. a supplier tried to sell you an energy deal over webchat
 6. one of your friends who work on behalf of an energy supplier tried to sell you an energy deal...
 GENERIC ENDING
 which, if any, of these words or phrases describe their sales approach?

SHOW SCREEN

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

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

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

Q94

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

SHOW SCREEN

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

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

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

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

Base: F47: Received annual summary

Q95

SINGLE CODE

SHOW SCREEN

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

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

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

Q96

SINGLE CODE

ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

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

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

Base: F48: Received bill

Q99

SINGLE CODE

SHOW SCREEN

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

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

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

Q100

SINGLE CODE

ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

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

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

Base: F49: Received PIN

Q103

SINGLE CODE

SHOW SCREEN

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

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

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

Q104

SINGLE CODE

ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

And how clearly or unclearly do you think the information was presented to you in the price increase notice?

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

Base: F50: Received end of fixed term letter

Q107

SINGLE CODE

SHOW SCREEN

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

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

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

Q108

SINGLE CODE

ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

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

- 1: Very clearly
- 2: Quite clearly
- 3: Neither clearly nor unclearly
- 4: Quite unclearly
- 5: Very unclearly

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

SHOW SCREEN AND READ OUT

During the past year, the Government and Ofgem, the energy regulator, have capped energy prices for **certain customers**. This means that energy suppliers can charge those customers no more than the cap, though they can charge less if they want to. This capped rate is sometimes called a "safeguard tariff".

The price cap is different to a regular "fixed price" tariff you may have heard of. Fixed price tariffs **vary from supplier to supplier**, and offer fixed price energy for a **set amount of time** (e.g. one year).

The price cap **is the same rate across all suppliers** and fixes prices **indefinitely**, rather than for a year or two.

QCAP1

SINGLE CODE

Before today, had you heard that some energy prices for some customers have now been capped by government, and the energy regulator Ofgem?

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

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

QCAP2

SINGLE CODE

Do you think that your energy prices are currently covered under the Government and Ofgem's price cap?

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

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

Q120

MULTIPLE CODE SHOW AS GRID

ROTATE ORDER OF PRESENTATION OF ROWS

SHOW SCREEN

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

For each of :

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

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

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

Intro10

READ OUT

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

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

Q128

SINGLE CODE

SHOW SCREEN

How often do you use the internet?

- 1: Roughly every day
- 2: At least once a week
- 3: At least once a month
- 4: Less than once per month
- 5: Never - but I do have access
- 6: Never - and I do not have access
- 98: Refused
- 99: Don't know

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

Onlin

MULTIPLE CODE

Which of the following do you personally own?

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

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

Q129

SINGLE CODE

SHOW SCREEN

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

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

- 1: Yes - English only
- 2: Yes - English first/main and speaks other languages
- 3: No - Another first/main language
- 4: Bilingual - consider both languages as main
- 98: Refused
- 99: Don't know

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

Q130

SINGLE CODE

SHOW SCREEN

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

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

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

Q131

MULTIPLE CODE

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

INTERVIEWER INSTRUCTION: Multiple code as many as apply

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

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

Disa2

ASK FOR EACH PERSON IDENTIFIED AT Q131

MULTIPLE CODE

SHOW SCREEN

If code 1 at Q131:

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

If code 2 at Q131

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

PLEASE SELECT ALL THAT APPLY

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

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

Q132

SINGLE CODE

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

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

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

Q133I

MULTI CODE

Do you receive any of the following tax credits or social security benefits?
Please include those you receive personally or jointly with your partner/spouse
PLEASE SELECT ALL THAT APPLY

- 20. Not receiving any benefits or credits (*SINGLE CODE ONLY*)
 - 21. Child Benefit
 - 22. Child Tax Credit
 - 23. Council Tax Benefit/Council Tax Reduction
 - 24. Disability Living Allowance or Personal Independence Payment (PIP)
 - 25. Employment and Support Allowance (ESA)
 - 26. Guardian's Allowance
 - 27. Housing Benefit
 - 28. Incapacity Benefit
 - 29. Income Support
 - 30. Jobseeker's Allowance
 - 31. State Retirement Pension (including Widow's Pension or Bereavement Allowance)
 - 32. Pension Credit
 - 33. Universal Credit
 - 34. Working Tax Credit
 - 35. Carers Allowance
 - 36. Winter Fuel Allowance
 - 37. Warm Home Discount
 - 38. Other benefits (please specify)
 - 98: Refused
 - 99: Don't know

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

Q133

SHOW INCOME CARD

This card shows incomes in weekly, monthly and annual amounts. Which of the groups on the card represents your personal/you and your husband's/wife's\ partner's combined income before any deductions such as income tax or National Insurance? Please include income from earnings, self-employment, benefits, pensions, and interest from savings. Just tell me the letter beside the row that applies to you.

- G: Under £100 / Under £400 / Under £5,000
- L: £101 and £160 / £401 - £640 / £5,050 - £8,000
- B: £161 - £199 / £641 - £829 / £8,001 - £9,999
- F: £200 - £240 / £830 - £961 / £10,000 - £12,000
- K: £241 - £308 / £962 - £1333 / £12,001 - £15,999
- I: £309 - £389 / £1,334 - £1,649 / £16,000 - £19,999
- D: £390 - £489 / £1,650 - £2,099 / £20,000 - £24,999
- C: £490 - £679 / £2,100 - £2,899 / £25,000 - £34,999
- A: £680 - £869 / £2,900 - £3,749 / £35,000 - £44,999
- J: £870 - £1,149 / £3,750 - £4,999 / £45,000 - £59,999
- H: £1,150 - £1,549 / £5,000 - £6,649 / £60,000 - £79,999
- E: £1,550 or over / £6,650 or over / £80,000 or over
- SPONTANEOUS ONLY: Nothing/no work or scheme
- 98: Refused
- 99: Don't know

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

Q134

SINGLE CODE

Can I just check, is your own \ your own and your partner's total income, before tax and any other deductions more or less than £16,000 per year?

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

1: Less than £16,000

2: £16,000 or more

98: Refused

99: Don't know

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

WelBi

SINGLE CODE

ALTERNATE ORDER OF ANSWER LIST

SHOW SCREEN

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

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

PLEASE SELECT ONE ONLY

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

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

Arrea

SINGLE CODE

SHOWSCREEN

In the last twelve months, has the household been in arrears on your gas or electricity bills.

That means that you have been unable to pay on time because of financial difficulties.

1 Yes, once

2 Yes, twice or more

3 No

98: Refused

99: Don't know

Base: F140: Has Prepayment meter

QPPM1

SINGLE CODE

How often, over the last year, would you say that you have been temporarily disconnected from your (FIRST FUEL TYPE FROM Q4 gas / electricity / heat] supply because the meter ran out of credit before you topped it up?

DO NOT READ OUT

- III. Gas
- IV. Electricity

- 1: Once a week or more
- 2: Two-three times a month
- 3: 6-12 times in the last year
- 4: 3-5 times in the last year
- 5: 1-2 times in the last year
- 6: Never
- 98: Refused
- 99: Don't know

Base: F141: Has been disconnected from any fuel type on PPM in the past 12 months

QPPM2

SINGLE CODE

LIST ROUTES THROUGH FROM THOSE CODED AT QPPM1

And which is the longest period of time you have been disconnected from your [INSERT FUEL TYPE CODED @ QPPM1] supply in the last year?
DO NOT READ OUT

- III. Gas
- IV. Electricity

- 1: Less than an hour
- 2: Up to three hours
- 3: Up to seven hours
- 4: Up to twelve hours
- 5: Up to twenty-four hours
- 6: Up to two days
- 7: More than two days [ENTER NUMBER INTO BOX]
- 98: Refused
- 99: Don't know

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

Q135

SINGLE CODE

Have you moved house in the last 12 months?

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

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

Proper

MULTIPLE CODE

SHOW SCREEN

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

- 1. Solar panels to generate electricity
- 2. Solar water heating
- 3. Wind turbine
- 4. Micro-hydropower system
- 5. Micro CHP boiler (boiler that also generates electricity)
- 6. Fully electric car/van

- 7. Hybrid car/van
- 8. Home energy storage (e.g. batteries in garage)
- 9. Smart heating controls (e.g. Hive, Nest, Tado)
- 10. Smart bulbs / lamps / lighting controls (controlled from a phone/tablet)
- 97. Other (specify)
- 96. None of these
- 99. Don't know
- 98. Refused

Base: F142: Has fully electric or hybrid vehicle

Properi

MULTIPLE CODE

LIST ROUTES THROGUH FROM ANSWERS GIVEN AT QPROPER

SHOW SCREEN

How many fully electric vehicles/hybrid vehicles do you own?

- iii. Fully electric vehicle
- iv. Hybrid vehicle

ENTER NUMBER FOR EACH

- 96. None of these
- 99. Don't know
- 98. Refused

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

Age

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

What is your age?

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

AGEBAND

DO NOT ROTATE

What is your age?

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

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

Gender

DO NOT ROTATE

What is your gender?

- 1. Male



- 2. Female
- 3. Other
- 4. Prefer not to say

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

Ethnicity

DO NOT ROTATE

Which of these groups do you consider you belong to?

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

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

Adults1

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

ENTER NUMBER

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

Adults2

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

ENTER NUMBER

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

Child1

Are there any CHILDREN UNDER 16 in the household?

- 1. Yes

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

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

Tenure

DO NOT ROTATE

SHOW SCREEN AND READ OUT

Please tell me whether your home is...

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

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

Work

DO NOT ROTATE

SHOWSCREEN

Are you...

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

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

Socialgrade

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

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

Are they/you ...

- 1. Working
- 2. Retired/Not working with private pensions/means
- 3. Unemployed less than 6 months
- 4. Unemployed more than 6 months
- 5. Retired with STATE BENEFIT/PENSION ONLY
- 6. Not working with STATE BENEFIT ONLY
- 7. Student
- 98. Prefer not to say

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

SHOW SCREEN

Thank you for your help with this survey so far. We may wish to get back in touch with some people in the future. Which of these do you give us permission to do in the next 2 years?

If you give your permission now, you can change your mind later. After 2 years, your contact details will be deleted and you will not be contacted again as a result of this survey.

1. Contact you again in relation to this specific research project should any questions arise
2. To be contacted again about taking part in follow-up research for Ofgem about these issues, either by GfK or another research agency appointed by Ofgem
3. Neither of these

Base: F0: all respondents

After

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

5.5 Full list of filters used in 2018

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

Filter No.	Description	Definition	Full filter description
F52	Received bill AND read it in detail/skimmed	[[Q99=1 OR Q99=2] AND [F48]]	F52: Received bill AND read it in detail/skimmed
F53	Received PIN AND read it in detail/skimmed	[[Q103=1 OR Q103=2] AND [F49]]	F53: Received PIN AND read it in detail/skimmed
F54	Received end of fixed term letter AND read it in detail/skimmed	[[Q107=1 OR Q107=2] AND [F50]]	F54: Received end of fixed term letter AND read it in detail/skimmed
F55	"Nothing\ no work or scheme" or don't know income or refused income	[Q133=11] OR [Q133=98] OR [Q133=99]	F55: "Nothing\ no work or scheme" or don't know income or refused income
F101	Have gas and electricity from same supplier and pay for them both in the same way (e.g. direct debit, on receipt of bill only)	[F7] AND [[Q5=1 AND Q6=1] OR [Q5=2 AND Q6=2] OR [Q5=3 AND Q6=3]]	F101 have gas and electricity from same supplier and pay for them both in the same way (e.g. direct debit, on receipt of bill only) (codes 1 or 2 or 3 at Q.5 and Q.6)
F102	Switched using price comparison site	[Q165=1]	F102 Switched using price comparison site
F106	Tried to switch but unable to at New17	[Tried = 1]	F106 Tried to switch but unable to
F107	Approached by salesperson at Repr (marked with * in answer list)	[Repr = 1] or [Repr = 2] or [Repr = 3] or [Repr = 4] or [Repr = 5] or [Repr = 6]	F107 Approached by salesperson from own or other energy company
F108	Shopped around in energy market but not switched supplier or tariff in P12M, or not shopped around in energy market at all in P12M	[Dummset<>1,2,3,4,5 or 6]	F108 Shopped around in energy market but not switched supplier or tariff in P12M, or not shopped around in energy market at all in P12M
F109	Someone else in household with long term limiting illness/disability at Q131	Q131=2	F109 Someone else in household with long term limiting illness/disability at Q131
F110	Respondent or spouse / partner has long term limiting illness/disability (Q131)	Q131=1 or 2	F110 Respondent or spouse/partner with long term limiting illness/disability
F111	Aware of smart meters	[SM1 = 1]	F111 Aware of smart meters

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

Filter No.	Description	Definition	Full filter description
		[DummSet=5] or [DummSet=6]	
F124	Switched gas or electricity supplier in past 12 months	[DummSet=1] or [DummSet=2] or [DummSet=3]	
f125	Thought they would save money from the switch	Q166 = 1 or Q166 = 2	F125 Thought they would save money from the switch
F126	Owed balance from old supplier when last switched'	OwedM = 1	F126 Owed balance from old supplier when last switched
F127	Cause to complain but did not complain	q81 = 1	F127 Cause to complain but did not complain
F128	Have received information about your energy consumption or use in P12M at Q94	Q94 = 1	F128: Have received information about your energy consumption or use in P12M at Q94
F129	Says they have a smart meter	[SM4=1]	F129: Says they have a smart meter
F130	Aware of personal projection	Q174 =1	F130: Aware of personal projection
F133	NOT Switched gas or electricity supplier or tariff, or compared suppliers or tariffs in the past 12 months	Dummset = 96	F133:NOT Switched gas or electricity supplier or tariff, or compared suppliers or tariffs in the past 12 months
F140	Has PPM	Q5 = 4	F140: Has PPM
F141	Has PPM and has been disconnected from any fuel type in past year	QPPM1 = 1-5	F141: Has PPM and has been disconnected from any fuel type in past year
F142	Has fully electric or hybrid vehicle	QProper = 6/7	F142: Has fully electric or hybrid vehicle

Filters F140, F141, F142 & F143 were added in 2018