

Report

Micro and Small Business Engagement Survey 2018

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This report is a summary of the main findings from the 2018 micro and small business engagement survey.

Ofgem has conducted this survey on an annual basis since 2014. It measures the level of micro and small business engagement in the energy market, business attitudes and behaviours around reviewing energy consumption, perceptions about the price differentiation in the market and the ease of comparing and switching suppliers. The survey is conducted with a nationally representative sample of businesses with fewer than 50 employees that have a non-domestic energy contract, using computer assisted telephone interviewing.

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1. Introduction

Context

1.1. Micro and small businesses have energy needs and consumption behaviour that are distinct from domestic consumers and larger businesses. Among the business population, they are particularly susceptible to poor outcomes including over-paying for their energy supply, and this is attributed, in part, to them having lower levels of engagement in the market.

1.2. In its 2016 energy market investigation, the Competition and Market Authority (CMA) recommended a number of remedies to increase engagement among micro and small business consumers. Ofgem monitors compliance with these. Encouraging engagement with the market is important to Ofgem as it helps drive competition between suppliers on price and service quality, leading to better outcomes for consumers.

1.3. This report provides an overview of the main findings from the 2018 micro and small business engagement survey. Ofgem uses this survey as one evidence stream to understand if market remedies and energy policy initiatives aimed at this audience have had the desired impact on behaviours and attitudes.

1.4. For the purposes of the research, micro and small businesses are defined as those with a non-domestic contract and with fewer than 50 full time equivalent employees. Engaged businesses are defined as those that have either switched energy supplier, switched energy tariff, compared tariffs but haven't switched or tried to switch supplier but were unable to do so (e.g. because they were under contract) in the past 12 months.

Research objectives

1.5. The research objectives for this study are to:

- Better understand attitudes towards energy among the micro and small business population to support policy development;
- Monitor engagement in the energy market to check progress towards competition goals; and
- Segment micro and small business energy consumers based on their energy engagement behaviours and attitudes, to enable development of more refined policy and communications.

Adding a business segmentation

1.6. The micro and small business engagement survey has run since 2014. Each year the questionnaire has been modified to accommodate Ofgem's information requirements.

1.7. In 2018, the survey was adapted to include a segmentation. This provides a deeper understanding the variation in attitudes and behaviours across micro and small businesses. One of its uses will be to help Ofgem develop tailored communications and engagement prompts.

1.8. The segmentation questionnaire was developed using findings from qualitative research that explored attitudes towards the energy market and engagement among micro and small businesses. Six discrete segments have been developed, which are described in Section 3 of this report.

Related documents

1.9. The full data tables for this survey are available on the Ofgem website:
<https://www.ofgem.gov.uk/publications-and-updates/consumer-research-datasets>

Acknowledgements

1.10. In 2018 the micro and small business engagement survey was co-funded between Ofgem and the Citizens Advice Bureau. The research methodology and reporting have been adapted this year to accommodate the needs of both organisations.

1.11. The 2018 survey was carried out by Policis and ICM Research on behalf of Ofgem and the Citizens Advice Bureau. We would like to thank them for their input and the insights they generated which greatly assisted with the preparation of this report.

2. Engagement in the energy market

Section summary

Micro and small businesses are becoming increasingly engaged in the energy market. While supplier and tariff switching rates are stable, comparison of prices is increasing and more businesses are renegotiating contracts.

Businesses that switched supplier in the past 12 months tend to be larger, are very focused on price savings and are aware that there is price differentiation in the market. Whereas businesses that haven't switched are less aware of price differences between suppliers, and not all may understand there can be benefits if they switch supplier.

Micro and small businesses that have not switched suppliers are more likely to be apprehensive about the switching process, which may further discourage them from switching.

Engagement

2.1. For the purposes of this survey Ofgem has defined engaged businesses as those that have either switched supplier, switched tariff, compared tariffs or attempted to switch but were unable to do so, in the past 12 months.

2.2. In 2018, two thirds (68%) of micro and small businesses had engaged in the energy market in the past 12 months, a small increase from 2017 (66%). Nearly half (47%) had switched (either supplier – 24% or tariff – 23%) and a further one in five (21%) compared tariffs or attempted to switch but were unable to do so for some reason (e.g. they were under contract with their existing supplier).

2.3. The increase in engagement is driven by an increase in the proportion of businesses that compared tariffs (up 2 percentage points from 2017). Overall, switching rates in 2018 are steady compared to 2017, however there has been a small increase in supplier switching and a corresponding decrease in tariff switching year on year.

2.4. Results are shown in Table 1 overleaf.

Table 1: Engagement in the energy market ¹

Activities carried out in the past 12 months	2017 (n=1254)	2018 (n=1253)
% switching energy supplier	21%	24%
% switching energy tariff	26%	23%
% comparing energy tariffs (or tried to switch but were prevented from doing so)	19%	21%
% engaged in the energy market	66%	68%
% undertaking no activity in the past 12 months	34%	32%

2.5. Looking at the longer term, two thirds (67%) of micro and small businesses have switched supplier at least once in the past 5 years, while just over half (56%) have switched tariff but stayed with the same supplier. Taken together, just over four in five (81%) of micro and small businesses have switched supplier or tariff at least once in the past 5 years. The proportion who have switched supplier at least once in the past 5 years has increased compared to 2017 (61%). We are unable to compare tariff switching rates over the past 5 years as this information was not collected in previous survey waves.

2.6. Engagement increases with business size. Businesses with 10-49 full time equivalent (FTE) employees are the most engaged (71%) and most likely to have switched supplier (32%), while sole traders are the least likely to engage (65%). This trend is consistent with previous tracking waves.

Table 2: Engagement by business size (2018)¹

Activities carried out in the past 12 months	Sole traders (n=288)	Micro-businesses with 1-4 FTE employees (n=467)	Micro-businesses with 5-9 FTE employees (n=223)	Small businesses with 10-49 FTE employees (n=265)
% switching supplier	22%	24%	24%	32%
% switching tariff	24%	23%	25%	19%
% comparing energy tariffs (or tried to switch but were prevented from doing so)	19%	21%	19%	20%
% engaged in the energy market	65%	68%	68%	71%
% undertaking no activity in the past 12 months	35%	32%	32%	29%

¹ Source questions: QD5: Has your business switched [fuel] supplier in the last 12 months?
 QD6: Have you switched [fuel] tariff in the last 12 months, but stayed with the same supplier?
 QD7: And thinking about the past 12 months, have you done any of the following in relation to your [fuel] contract?

Behaviours associated with engagement

2.7. While the switching rate is steady, there has been significant growth in involvement with contracts. An increasing number of micro and small businesses re-negotiated their contract in the past 12 months (45% - up from 39% in 2017 and at a tracking high). More know their contract end dates (74% know the month it ends or the exact date, up three percentage points since last year) and more read their contracts in detail (27%, up 6 points since last year).

2.8. Furthermore, more businesses now believe that the switching process is straightforward. In 2018 more businesses agreed that it was easy to compare prices between suppliers (51% compared to 47% in 2017) and more agreed that it was easy to switch supplier (62% compared to 56% in 2017).

Perceptions about the switching process

2.9. The improvement in the metrics discussed above suggests that barriers to switching may be reducing. However, there is an element of circularity. It is those businesses who have switched or compared who are the most likely to believe the process is easy. Businesses that haven't engaged in the market in the past 12 months are more likely to worry that things will go wrong if they switch and fewer (compared to switchers) believe the switching process is easy or that price comparison is easy. This suggests that a proportion of businesses hold negative views of the energy switching process, which needs to be overcome to encourage them to switch. In Section 3 we provide more detail about which businesses do and don't engage with energy when we discuss the segmentation.

Table 3: Perceptions of the switching process among engaged and disengaged²

Perceptions about the switching process	All businesses (n=1253)	Switched supplier or tariff in the past 12 months (n=592)	Compared tariffs but didn't switch in the past 12 months (n=241)	No switching or comparison activity in past 12 months (n=401)
% agreeing that it is easy to compare prices between suppliers	51%	55%	50%	46%
% agreeing that the process of switching suppliers is easy	62%	68%	56%	57%
% who worry that something will go wrong if they switch	35%	32%	38%	37%

² Source question: QD32: In terms of the switching process, to what extent to you agree or disagree that: It is easy to compare prices between tariffs and suppliers; The process of switching suppliers is easy.

Motivations for switching

2.10. Engagement with energy is driven by a desire to save money. The majority (89%) of businesses that switched or compared tariffs did so to achieve cost savings.

2.11. However, switching tends to be prompted by actions of the supplier (i.e. it is reactive). Nearly half (44%) of businesses that have switched or compared tariffs were prompted to change supplier because they were offered a lower price contract and one in five (20%) mentioned receiving a price increase notification (see Table 4 below).

Table 4: Reasons for switching supplier or tariff³

Reasons for switching supplier or tariff (Only those reasons mentioned by 5% or more of the sample are shown in this table)	Businesses that have switched or compared tariffs (n=1106)
The business was offered a lower price contract or tariff	44%
The business received a price increase notification from its previous supplier	20%
The business knew their contract was coming to an end	13%
The business received a renewal notice from its existing supplier	6%
A broker/consultant recommended switching	5%
The business was not satisfied with the customer service from their previous supplier	5%

Stated barriers to switching

2.12. Micro and small businesses that haven't switched supplier or tariff in the past 12 months stated they did not do so for reasons related to: loyalty to existing suppliers (60% said they were happy with their supplier, 44% said they preferred to stay with a supplier they know); because they were tied into a contract (52%); because of negative perceptions about the switching process (38% said switching is too time consuming, 36% were too busy to switch, 35% said it's too much hassle); or because they didn't see much benefit to switching (36% didn't believe switching would result in significant savings).

³ Source question: QD9. What prompted you to compare supplier/change tariff/try to switch supplier/switch supplier on the last occasion?

Table 5: Stated barriers to switching⁴

Stated barriers to switching (Among business that haven't switched in the past 12 months)	% mentioning at all (n=611)	% saying it is one of the top three barriers (n=611)
Satisfied with existing supplier	60%	34%
Tied into existing contract	52%	34%
Prefer to stay with supplier they know	44%	18%
Too time consuming	38%	14%
Too busy	36%	14%
Switching would not result in significant savings	36%	15%
Too much hassle	35%	16%

The impact of perceptions of price on switching

2.13. Further analysis reveals that barriers to switching go much deeper than the top of mind factors listed above. Businesses that haven't engaged in the energy market in the past 12 months may not be aware of the pricing differentiation in the market, and thus do not see a reason to switch supplier.

2.14. Table 6 (overleaf) shows the proportion of businesses who believe there are differences in pricing between energy suppliers, spilt out by businesses that have switched supplier or tariff and those that have undertaken no activity in the past 12 months.

2.15. Significantly more businesses undertaking no activity believe that all suppliers charge the same (43%) and that the differences between tariffs are marginal (51%) when compared to businesses that have switched.

⁴ Source questions: QD12a: Which of the following reasons, if any, contributed to why you haven't switched supplier or tariff in the last 12 months? QD12b: Which of these was most important?

Table 6: Understanding of pricing differentiation⁵

% agreeing that...	Switched supplier or tariff in the past 12 months (n=592)	No switching or comparison activity in past 12 months (n=401)
All suppliers charge the same	29%	43%
There are large differences in price between suppliers	71%	57%
The differences between tariffs are marginal	38%	51%
There are big differences between tariffs	62%	49%

2.16. As noted above, disengaged businesses have a greater tendency to view the switching process negatively compared to those who have engaged. This combined with their lower understanding of pricing differentiation means that specific prompts explaining the benefits of switching and highlighting how easy it is to switch may need to be developed to reach them.

Use of third party intermediaries

2.17. Businesses were asked which sources they used to help choose their current energy plan. Many businesses use third party intermediaries to help them source their energy deal, with brokers the most widely used (67%). Suppliers are the next most commonly used source (over half use their current supplier and a third searched for information from other suppliers), while price comparison websites are the fourth most commonly used source (31%).

2.18. When asked what the main source was, brokers (41%) and current supplier (24%) are far more commonly used than price comparison websites (10%).

2.19. Results are shown in Table 7 overleaf.

⁵ Source question: QD2a/b/c: Which of the following statements best described how you think about the energy market and energy pricing?

Table 7: Sources used when choosing current energy contract or tariff⁶

Sources used when choosing contract/tariff (among businesses who have switched supplier or tariff in past 5 years)	% using at all (n=1012)	% using as main source (n=1012)
An energy broker	67%	41%
Current supplier	55%	24%
Other suppliers	34%	5%
A price comparison website	31%	10%
Previous supplier	31%	3%
An internet search engine	28%	4%
A price comparison tool on a supplier’s website	14%	2%
A review site	11%	1%

2.20. Use of energy brokers increases with business size. A third (33%) of sole traders used them as their main source of information, while almost half (48%) of businesses with 10-49 FTE employees used them.

Table 8: Main source used when choosing current contract or tariff by business size⁷

Main source used	Sole traders (n=225)	Micro-businesses with 1-4 FTE employees (n=364)	Micro-businesses with 5-9 FTE employees (n=195)	Small businesses with 10-49 FTE employees (n=221)
An energy broker	33%	41%	46%	48%
Current supplier	27%	23%	20%	27%
A price comparison website	11%	11%	10%	5%
Other suppliers	5%	6%	3%	5%
An internet search engine	6%	3%	5%	3%
Previous supplier	3%	2%	3%	1%
A price comparison tool on a supplier’s website	1%	2%	3%	1%
A review site	1%	1%	1%	-

⁶ Source questions: QD17. When choosing your current contract or tariff did you consult or were you approached by any of the following? QD18. And how did you mainly choose your current contract or tariff?

⁷ Source question: QD18. And how did you mainly choose your current contract or tariff?

Confidence in energy choices

2.21. The majority of micro and small businesses are confident that they are on the best available tariff from their current supplier (69%), that their tariff is competitive against other offers in the market (74%) and that they can judge the what the best deal is (76%).

2.22. As might be expected, those who have switched in the past 12 months are the most confident in their choice (as they have recently reviewed the market), while those who undertook no activity in the past 12 months have lower confidence levels.

Table 9: Confidence about energy choice⁸

Business confidence	All businesses (n=1253)	Switched supplier or tariff in the past 12 months (n=592)	Compared tariffs but didn't switch in the past 12 months (n=241)	No switching or comparison activity in past 12 months (n=401)
% who are confident they are on the best tariff available from their supplier	69%	78%	67%	59%
% who are confident their tariff is competitive against other suppliers in the market	74%	82%	72%	65%
% who are confident they can judge the best deal	76%	81%	77%	68%

⁸ Source question: QE1. Thinking now about your own business tariff(s) how confident are you that... You are on the best tariff available from your current supplier/Your tariff is competitive with what other suppliers in the market are offering/ When looking for deals, you can judge whether you're getting a good deal

3. The micro and small business segmentation

Section summary

Six discrete micro and small business segments have been identified. Each varies in attitudes towards and understanding of the energy market. They are presented in order of engagement with the energy market.

Deeply Disengaged: Non switchers, with poor understanding of price differentiation in the market and the benefits of switching.

Peevish Pragmatists: Have some appreciation of the benefits of engaging, but energy is not a sufficient priority to the business to motivate them to frequently compare or switch.

Steady Sceptics: Have a strong affinity to their current supplier. They respond to their supplier's prompts to switch tariff, but don't believe there is much benefit to be gained from changing supplier.

Receptive but Reactive: They appreciate they can save money from switching supplier, but tend to respond to offers made to them, rather than seeking them out.

Canny Considerers: Have a low energy spend, but still appreciate the benefits of switching and will do so regularly.

Shrewd Spenders: These businesses have high energy expenditure and are focused on minimising costs to the business. They seek out better deals and switch regularly.

Six segments have been identified

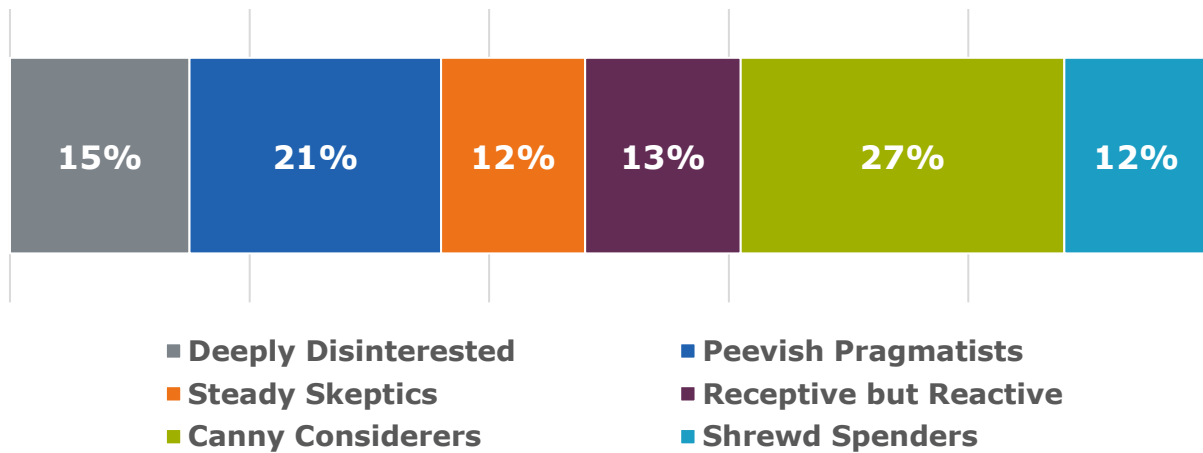
3.1. Common trends towards engagement in the energy market have been used to create discrete segments which describe how businesses are likely to interact in the energy market.

3.2. Factors used to create the segmentation include: understanding of pricing and contract terms; perceptions of pricing differences across the market; how easy businesses find the process of switching; propensity to switch; confidence in their current energy deal; and their current energy spend.

3.3. This segmentation highlights attitudinal and behavioural differences between businesses and can be used to develop tailored solutions for each to optimise pathways towards increased engagement.

3.4. There are six distinct micro and small business segments. The distribution is shown in Figure 1 (overleaf) and their prevailing characteristics are described in more detail below.

Figure 1: Micro and small business segments



Deeply Disengaged (15%)

3.5. Core attitudes towards energy: ‘I’m not interested in energy, and it’s hard to compare prices.’⁹

3.6. These businesses have a poor understanding of pricing or contract terms and see little differentiation between suppliers. They see the switching process as difficult and time consuming and don’t give much thought to changing suppliers. Most haven’t switched supplier in the past 5 years and haven’t done any price comparison in the past year.

3.7. While Deeply Disengaged micro and small businesses are less cost focused than other segments, they do have an appetite for saving money – but they need to be shown how much they could gain from switching and how easy it is to switch.

Peevish Pragmatists (21%)

3.8. Core attitudes towards energy: ‘I sorted out my energy a while ago. I’m on a good deal. I know it’s easy to switch but you don’t always save as much as you think you will. There are other priorities in my business right now.’

3.9. Peevish Pragmatists know there are pricing differences in the market and see switching as a relatively easy process. They’re confident they’re on a good deal and aren’t sure there is much to be gained by switching. They’re confident enough to switch but they didn’t feel the need to do this very often.

⁹ The statements describing the core attitudes towards energy for each micro and small business segment are composites created from analysis of the survey data. They are not direct quotes from micro or small business energy decision-makers.

Steady Sceptics (12%)

3.10. Core attitudes towards energy: 'I'm happy with my supplier. They give me a new deal every so often and I wouldn't save if I switched away.'

3.11. Steady Sceptics are loyal to their supplier, but periodically change tariffs. They value cost savings and achieve these by renegotiating contracts. They don't believe they will save more if they switch supplier. They are confident they are on a good deal.

3.12. While relatively engaged, Steady Sceptics prefer to stick with a supplier they know. They rely on their energy supplier to approach them with new deals. To increase engagement, this segment may need more education about the pricing differences between suppliers and reassurance that nothing will go wrong if they switch.

Receptive but Reactive (13%)

3.13. Core attitudes towards energy: 'We spend a lot on gas so it's important we get a good deal. We'll switch if prices go up and someone offers us a good deal.'

3.14. These businesses have high gas spend and value savings. They switch supplier every 2-3 years, usually prompted by a price increase or end of contract notice. They prefer long term contracts and use energy brokers to help them get their energy deal. An engaged segment, but this is in response to supplier actions. Their high gas use may mean they prefer pricing certainty, which can be offered by long term contracts.

Canny Considerers (27%)

3.15. Core attitudes towards energy: 'We don't spend much on energy, but we want the best deal. It's hard to tell who is best and we prefer short term contracts so we don't get locked in to a poor deal for a long time.'

3.16. Canny Considerers have low energy spend, but are sensitive to price increases. They are highly engaged and believe they will save money by switching. All have switched tariff or supplier in the past year and prefer short term contracts so they can regularly renegotiate or switch to a cheaper deal. They are less confident they are on the best deal than average, which may drive this regular price review.

Shrewd Spenders (12%)

3.17. Core attitudes towards energy: 'Energy is crucial to our business. There are big differences in pricing between suppliers so it's important to look around. We switch regularly to save money.'

3.18. Shrewd Spenders have higher than average electricity consumption and are aware of price differentiation in the market. They are knowledgeable about their contract end dates and regularly compare tariffs and suppliers. They tend to switch supplier rather than tariff and often initiate the switch themselves. They use brokers to get a good deal.

Segment dimensions

3.19. Very broadly speaking, the segmentation aligns to energy spend and the importance the business places on getting the best energy tariff. That is, micro and small businesses that spend more, tend to switch or compare tariffs more frequently. This is perhaps not surprising as the cost of energy may be a significant expense for businesses, so it is important they have a competitive energy deal.

Appendix 1

Research methodology

The sample

1.1. The micro and small business engagement survey is conducted with businesses that have a non-domestic energy contract and fewer than 50 employees.

1.2. In 2018, 1253 businesses were surveyed. The survey interview is conducted with the individual responsible for making decisions about energy for the business.

1.3. The survey is representative of the population of small and microbusinesses within Great Britain, based location and business size.

1.4. The survey is conducted using computer aided telephone interviewing, during business hours.

Fieldwork timing and naming conventions

1.5. In previous years fieldwork was carried out towards the end of the calendar year. However the 2018 wave was shifted to accommodate the development of the questionnaire to be used for the segmentation. Survey fieldwork took place from December 2017 – February 2018.

1.6. The fieldwork was carried out by Walnut ICM Research.

Appendix 2

Questionnaire

SECTION 1: INTRODUCTION

READ OUT TO ALL:

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

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

IF ASKED:

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

This survey lasts around 25 minutes, depending on your answers. Would you be able to help us?

IF NECESSARY:

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

IF NECESSARY, REASSURE:

- Any information you provide will be treated in strictest confidence, and answers you give will not be attributed to you or your organisation. Data is reported at aggregate level only.
- We strictly abide by the Market Research Society Code of Conduct.
- Your details have been provided from Sample Answers’ commercial database.
- The contact at ICM is on
- We are happy to send you a PDF copy of the final report and a link to the publication on Ofgem’s website.

IF YES: CONTINUE

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

ARRANGE CALL BACK THEN THANK AND CLOSE.

ADDITIONAL OUTCOME CODES IF CLOSING:

Not a business	1
Domestic energy contract	2
Landlord or other arranges energy contract	3
Business no longer operating / closed down	4
Don't use gas or electricity / don't have a contract	5
Survey not relevant – other (specify)	6
Refused – don't have time	7
Refused – company policy	8
Refused – other	9

SECTION 2: SCREENING

INTERVIEWER INSTRUCTIONS: READ OUT TO ALL

Thank you for agreeing to take part in this research.

HIDDEN VARIABLE, SINGLE CODE, CODE FROM SAMPLE

dQS1. SIC 2007.

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

ASK ALL, SINGLE CODE

QA1. Firstly, does **[INSERT ANSWER FROM dQS1]** sound like a broadly correct description of your company's activity?

INTERVIEWER INSTRUCTIONS: DO NOT READ OUT

Yes	1
No	2
Not sure	99

ASK IF A1=2 OR dQS1=99, OPEN ENDED

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

INTERVIEWER INSTRUCTIONS: PROBE WITH THESE QUESTIONS:

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

[WRITE IN]

INTERVIEWER INSTRUCTIONS: CODE THE APPROPRIATE SECTOR CODE BASED ON RESPONSE

dQA2_1. Micro-sector		dQA2_2. Macro-sector	Quota (TBC)
A. Agriculture, forestry and fishing	1	<i>Primary</i>	200
B. Mining and quarrying	2		
C. Manufacturing	3		
D. Electricity, gas, steam and air conditioning supply	4		
E. Water supply; sewerage, waste management and remediation activities	5		
F. Construction	6	<i>Construction</i>	150
G. Wholesale and retail trade; repair of motor vehicles and motorcycles	7	<i>Retail / wholesale</i>	300
H. Transportation and storage	8	<i>Transport, food, accommodation</i>	200
I. Accommodation and food service activities	9		
J. Information and communication	10	<i>Business services</i>	250
K. Financial and insurance activities	11		
L. Real estate activities	12		
M. Professional, scientific and technical activities	13		
N. Administrative and support service activities	14		
O. Public administration and defence; compulsory social security	15	CLOSE	
P. Education	19	<i>Other services</i>	150
Q. Human health and social work activities	17		
R. Arts, entertainment and recreation	18		
S. Other service activities	19		
T. Activities of households as employers	20	CLOSE	
U. Activities of extraterritorial organisations and bodies	21		
Not provided	99		

ASK ALL, SINGLE CODE

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

INTERVIEWER INSTRUCTIONS: DO NOT READ OUT, IF NECESSARY CLARIFY

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

QS4_1. Number of employees		QS4_2. Business size	Quota
None – just me / me and business partner(s)	1	<i>Small micro (no employees)</i>	350
1 – owners and one other	2	<i>Small micro (1-4)</i>	400
2-4	3		
5-9	4		
10-19	5	<i>Larger micro (5-9)</i>	250
20-29	6		250
30-39	7		
40-49	8		
50+	9		
Don't know	99		
Refused	97		

ASK ALL, SINGLE CODE

QS4. And how many full time-equivalent employees does that work out as?

INTERVIEWER INSTRUCTIONS: DO NOT READ OUT, IF NECESSARY CLARIFY

- **EXCLUDE SELF-EMPLOYED**
- **EXCLUDE OWNERS/PARTNERS, BUT OTHER DIRECTORS COUNT AS EMPLOYEES**

QS4_1. Number of employees		QS4_2. Business size	
None – just me / me and business partner(s)	1	<i>Small micro (no employees)</i>	
0-1 – owners and up to one other	2	<i>Small micro (1-4)</i>	
2-4	3		
5-9	4		
10-19	5	<i>Larger micro (5-9)</i>	
20-29	6		
30-39	7		
40-49	8		
50+	9		
Don't know	99	THANK AND CLOSE READ OUT: Thank you – this research is concerned with businesses with fewer than 50 employees so we won't be able to continue the interview.	
Refused	97		

ASK ALL, SINGLE CODE

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

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

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

ASK ALL, SINGLE CODE

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

INTERVIEWER INSTRUCTIONS: DO NOT READ OUT

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

ASK ALL, SINGLE CODE

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

INTERVIEWER INSTRUCTIONS: DO NOT READ OUT

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

ASK IF QS5=2-97 OR 98, SINGLE CODE

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

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

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

ASK ALL, SINGLE CODE

QS7. And [**IF QS6=2 OR 3:** on the sites you are responsible for,] does your business use mains electricity, mains gas, or both?

INTERVIEWER INSTRUCTIONS: DO NOT READ OUT

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

ASK IF QS7=3, SINGLE CODE

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

INTERVIEWER INSTRUCTIONS: DO NOT READ OUT

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

HIDDEN VARIABLE, DO NOT DISPLAY

dQS8. Fuel to ask about in the survey

DETERMINE ALLOCATION BASED ON THE FOLLOWING RULES

- **IF QS7=1 OR IF QS8=2, ALLOCATE CODE 1 (ELECTRICITY)**
- **IF QS7=2 OR IF QS8=3, ALLOCATE CODE 2 (GAS)**
- **IF QS8=1 THEN HALF OF THEM ARE TO BE ALLOCATED TO CODE 1 (ELECTRICITY), HALF ARE TO BE ALLOCATED TO CODE 2 (GAS)**

Electricity	1
Gas	2

SECTION 3: GAS AND ELECTRICITY EXPENDITURE

ASK IF QS7=1 OR IF QS8=1 OR 2, SINGLE CODE

QB1. Who supplies your electricity?

INTERVIEWER INSTRUCTIONS: DO NOT READ OUT

Affect Energy	1
Axis Telecom	2
Axpo UK Limited	3
BES Utilities	4
Bristol Energy	5
British Gas	6
Brook Green Supply	7
Bulb Energy	8
Corona	9
Dong Energy (Ørsted from 6 th November 2017)	10
E.ON	11
Ecotricity	12
EDF	13
Effortless Energy	14
Engie	15
Extra Energy	16
Gazprom	17
Gnergy	18
Bryt Energy Limited	19
Good Energy	20
Cyclone Energy Supply Limited	21
Green Energy	22
Dual Energy	23
Green Star Energy	24
Kensington Power Limited	25
Marble Power	26
Eneco Energy Trade BV	27
Npower	28
EPG Energy Limited	29
Ephase	30
F&S Energy Limited	31
Opus	32
Ørsted (previously Dong Energy)	
Places for People Energy	33
Positive Energy	34
Robin Hood Energy Limited	35
Haven Power	36
iSupply Energy	37
Scottish Power	38
Lightning Energy Supply Company Limited	39
LoCo2 Energy	40
MA Energy	41
SSE	42
Octopus Energy	43
Switch Business Gas and Power	44
Opus Energy Renewables Limited	45
OVO	46
Planet 9 Energy	47

Power4All	48
Total Gas and Power	49
Sing Power Ltd	50
Smartest Energy	51
Squeaky Clean Energy	52
Utilita	53
Statkraft Markets GmbH	54
Utility Warehouse	55
Yorkshire Gas and Power	56
Vattenfall Energy Trading GmbH	57
Other (Please Specify)	98
Don't know	99
Refused	97

ASK IF QS7=1 OR IF QS8=1 OR 2, SINGLE CODE

QB2. [IF QS6=2 OR 3: Thinking about the sites you are responsible for,] Including VAT, approximately how much has your business spent on electricity in the last 12 months?

INTERVIEWER INSTRUCTIONS: DO NOT READ OUT, IF UNSURE – PLEASE PROVIDE YOUR BEST ESTIMATE.

Less than £500	1
Between £500 and £1,000	2
Between £1,001 and £2,500	3
Between £2,501 and £5,000	4
Between £5,001 and £6,400	5
Between £6,401 and £10,000	6
Between £10,001 and £15,000	7
Between £15,001 and £25,000	8
Between £25,001 and £50,000	9
More than £50,000	10
Don't know	99
Refused	97

ASK IF QS7=1 OR IF QS8=1 OR 2, SINGLE CODE

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

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

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

ASK IF QS7=2 OR IF QS8=1 OR 3, SINGLE CODE

QB5. Who supplies your gas?

INTERVIEWER INSTRUCTIONS: DO NOT READ OUT

Affect Energy	1
Axis Telecom	2
Axpo UK Limited	3
Barrow Shipping Limited	4
BES Utilities	5
Better Energy	6
BP	7
Bristol Energy	8
British Gas	9
Brook Green Supply	10
Bulb Energy	11
Contract Natural Gas Ltd	12
Corona	13
Crown Energy	14
Daligas	15
D-Energi	16
Dong Energy (Ørsted from 6 th November 2017)	17
E.ON	18
Economy Gas	19
Economy Power	20
Ecotricity	21
EDF	22
Effortless Energy	23
Engie	24
ENI Trading and Shipping	25
Extra Energy	26
Flogas	27
Gazprom	28
Gnergy	29
Good Energy	30
Great Western Energy	31
Green Energy	32
Green Star Energy	33
I.A.Z.F.S Limited	34
Kensington Power Limited	35
Marble Power	36
Npower	37
Opal Gas	38
Opus	39
Ørsted (previously Dong Energy)	
Places for People Energy	40
Pozitive Energy	41
Regent Gas	42
Robin Hood Energy Limited	43
Scottish Power	44
SSE	45
Statoil	46
Switch Business Gas and Power	47
Total Energy Gas Supplies	48
Total Gas and Power	49
UK National Gas LTD	50

United Gas & Power	51
Utilita	52
Utility Warehouse	53
Vayu	54
Xcel Energy	55
Yorkshire Gas and Power	56
Zog Energy	57
Other (Please Specify)	98
Don't know	99
Refused	97

ASK IF QS7=2 OR QS8=1 OR 3, SINGLE CODE

QB6. [IF QS6=2 OR 3: Thinking about the sites you are responsible for,] Including VAT, approximately how much has your business spent on mains gas in the last 12 months?

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

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

ASK IF QS7=2 OR IF QS8=1 OR 3, SINGLE CODE

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

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

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

SECTION 4: CURRENT CONTRACT

SHOW TO ALL:

QC1. Thinking now about your energy contract which of these statements would best describe your own views on energy contracts

**INTERVIEWER READ OUT AND ROTATE ORDER
SINGLE CODE**

I prefer the certainty of a fixed price on a longer term contract	1
I like short term contracts so I can renegotiate the best price regularly	2
I don't really give much thought to the type of energy contract I am on	3

The rest of this set of questions will be about your current **[INSERT ANSWER FROM dQS8]** contract. It's fine to say if you are not sure for these questions.

ASK ALL

QC2. How long ago did you set up your current **[INSERT ANSWER FROM dQS8]** contract?

INTERVIEWER INSTRUCTIONS: DO NOT READ OUT

12 months or less	1
1 – 2 years	2
2 – 3 years	3
3 – 5 years	4
5 – 10 years	5
Longer	6
Don't know	99

ASK ALL

QC4. And did any of the following apply when you took on your most recent energy contract? Choose as many as apply **READ OUT**

MULTI CODE

Moved into new premises	1
Starting a new business	2
Taking over an existing supplier	3
None of these	99

ASK ALL

QC5. What do you think would happen if your current **[INSERT ANSWER FROM dQS8]** contract came to an end and you hadn't got in contact with your supplier?

SINGLE CODE

INTERVIEWER READ OUT

The contract just rolls over and continues on the same terms	1
The contract pricing reverts to the supplier's standard variable tariff	2
Not sure	99

ASK ALL, SINGLE CODE

QC6 (QC2). A fixed term contract is one where you have to stay with the same supplier, on the same tariff, for a set period of time. Do you have a fixed term contract for your **[INSERT ANSWER FROM dQS8]**?

INTERVIEWER INSTRUCTIONS: DO NOT READ OUT

Yes	1
No	2
Not sure	99

ASK IF QC6=1, SINGLE CODE

QC7 (QC3). What is the total term of your current **[INSERT ANSWER FROM dQS8]** contract? By that I mean the total length of your contract from its start date to when it's due to end, not just the time remaining.

INTERVIEWER INSTRUCTIONS: DO NOT READ OUT

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

ASK IF QC6=1, SINGLE CODE

QC8 (QC4). Do you know when your current **[INSERT ANSWER FROM dQS8]** contract ends?

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

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

ASK ALL, SINGLE CODE

QC9. In how much detail, if at all, have you ever looked through your current **[INSERT ANSWER FROM dQS8]** contract? Have you...?

INTERVIEWER INSTRUCTIONS: READ OUT

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

ASK ALL, SINGLE CODE

QC10 (QC8). Is the [INSERT ANSWER FROM dQS8] contract you currently have with [IF dQS8=1 THEN INSERT ANSWER FROM QB1, IF dQS8=2 THEN INSERT ANSWER FROM QB5, IF QB1 OR QB5=97, 98, OR 99 THEN INSERT: your supplier] your first ever contract with them, a re-negotiated contract, or is it an extension or rollover from a previous contract?

INTERVIEWER INSTRUCTIONS: DO NOT READ OUT

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

ASK IF QC10=3, SINGLE CODE

QC11 (QC10). Were you made aware that this contract was being extended or rolled over?

INTERVIEWER INSTRUCTIONS: DO NOT READ OUT

Yes	1
No	2
Don't know	99

ASK ALL, SINGLE CODE

QC12. (QC13) Have you received a [INSERT ANSWER FROM dQS8] bill in the last 12 months?

INTERVIEWER INSTRUCTIONS: DO NOT READ OUT

Yes	1
No	2
Can't remember	99

ASK IF RECEIVED BILL IN PAST 12 MONTHS (qc12=1)

QC13. When a bill comes in, do you...?

INTERVIEWER - READ OUT, MULTI CODE, CHOOSE AS MANY AS APPLY

Read the bill in detail	4
Glance at the bill/skim read it	1
Check the bill is the amount you'd expect	2
Check that the bill matches your energy consumption	3
Send the bill to accounts	5
None of these	99

ASK IF ALL, SINGLE CODE PER ROW

QC14 (QC14). The last time you received your **[INSERT ANSWER FROM dQS8]** bill, do you recall seeing...

INTERVIEWER INSTRUCTIONS: READ OUT STATEMENTS

		Yes	No	Can't remember
QC12_1	Your contract end date	1	2	99

ASK ALL, SINGLE CODE

QC15a. (QC12a) Have you received a **[INSERT ANSWER FROM dQS8]** contract renewal letter in the last 12 months?

INTERVIEWER INSTRUCTIONS: DO NOT READ OUT

Yes	1
No	2
Can't remember	99

ASK IF QC15a=1, SINGLE CODE

QC15b (QC12b). In how much detail, if at all, have you looked at the contract renewal letter? Have you...?

INTERVIEWER INSTRUCTIONS: DO NOT READ OUT

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

ASK IF QC13b=1 OR 2, SINGLE CODE ONLY FOR EACH

QC15c (QC12c). In the contract renewal letter do you recall seeing information about ...?

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

		Yes	No	Can't remember
QC13c_1	Your current energy prices or tariff information?	1	2	99
QC13c_2	Information about your energy consumption?	1	2	99

SECTION 5: ATTITUDES TO SWITCHING ENERGY SUPPLIER AND ENERGY SWITCHING BEHAVIOUR

The next set of questions are all about your energy contracts and whether you switch suppliers.

ASK ALL

QD1(QF1). Which of these statements would best describe your attitude when your [INSERT ANSWER FROM dQS8] contract comes to an end?

READ OUT

SINGLE CODE

When my contract is almost up, I shop around for energy deals and usually agree a new contract.	1
I do change contract on occasion, but it's not something I do regularly.	2
Comparing energy deals is not something I ever really think about	3

ASK ALL

QD2. Which of these pairs of statements best describes how you think about the energy market and energy pricing. Please select ONLY ONE in each pair.

SINGLE CODE

QD2a(QD1a.)

Energy suppliers reward loyal long term customers with preferential rates	1
Energy suppliers reserve their best rates for new customers	2

QD2b(QD1b).

All energy suppliers charge pretty much the same	1
There are large differences in the prices that different energy suppliers charge	2

QD2c (QD1c.)

The differences in price between tariffs any supplier offers are marginal	1
There are big differences between the tariffs any supplier offers	2

ASK ALL, SINGLE CODE

QD3 (E1). How many times, if at all has your business switched [INSERT ANSWER FROM dQS8] supplier in the last five years?

INTERVIEWER INSTRUCTIONS: DO NOT READ OUT, PROMPT AS NECESSARY.

CODE ONE ONLY

Once	1
Twice	2
3 times	3
4 times	4
5 times	5
More than 5 times	6
Can't remember how many times, but have definitely switched in the past 5 years	7
Have not switched in the last five years	8
Don't know	99

ASK ALL, SINGLE CODE

QD4 (E1). How many times, if at all has your business switched tariff with an existing [INSERT ANSWER FROM dQS8] supplier in the last five years?

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

Once	1
Twice	2
3 times	3
4 times	4
5 times	5
More than 5 times	6
Can't remember how many times, but have definitely switched in the past 5 years	7
Have not switched in the last five years	8
Don't know	99

ASK IF QD3 =1-7, SINGLE CODE

QD5 (E2). Has your business switched [INSERT ANSWER FROM dQS8] supplier in the last 12 months?

INTERVIEWER INSTRUCTIONS: DO NOT READ OUT

Yes	1
No	2
Don't know	99

ASK IF (QD5=2,99 OR QD3=8,99) AND (QD4=1-7)) SINGLE CODE

QD6 (E9). Have you switched [INSERT ANSWER FROM dQS8] tariff in the last 12 months, but stayed with the same supplier?

INTERVIEWER INSTRUCTIONS: DO NOT READ OUT

Yes	1
No	2
Can't remember	99

ASK ALL, MULTI CODE EXCEPT CODE 96 WHICH IS EXCLUSIVE

QD7 (QC15). And thinking about the past 12 months, have you done any of the following in relation to your [INSERT ANSWER FROM dQS8] contract?

INTERVIEWER INSTRUCTIONS: READ OUT STATEMENTS

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

ASK IF QD5=2/99 OR QD3=8/99 SINGLE CODE

QD8a (QE10a). Have you attempted to switch [INSERT ANSWER FROM dQS8] supplier in the last 12 months, but something prevented the switch from going through?

INTERVIEWER INSTRUCTIONS: DO NOT READ OUT

Yes	1
No	2
Can't remember	99

ASK IF QD8a=1, MULTI CODE EXCEPT CODE 96 AND 99 WHICH ARE EXCLUSIVE, RANDOMISE ORDER OF STATEMENTS BUT ANCHOR 98, 96 AND 99 AT BOTTOM

QD8b (QE10b). And which, if any, of the following prevented the switch from going through? Was it that...?

INTERVIEWER INSTRUCTIONS: READ OUT, CODE ALL THAT APPLY

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

ASK ALL

READ OUT: I'd now like you to think about the process of switching supplier.

ASK SUPPLIER/ TARIFF SWITCHERS AND FAILED SWITCHERS AND COMPARERS

QD3 = 1- 7 or QD4 = 1- 7 or QD5 =1 or QD6 =1 or QD7 = 1 or 2 or QD8a = 1

QD9 (QE5). What prompted you to switch [**INSERT ANSWER FROM dQS8**] supplier (QD3 = 1-7) / try to switch [**INSERT ANSWER FROM dQS8**] supplier (QD8a =1)/ change tariff with your existing [**INSERT ANSWER FROM dQS8**] supplier (QD4=1-7)/compare [**INSERT ANSWER FROM dQS8**] deals (QD7 = 1 or 2) on the last occasion?

INTERVIEWER INSTRUCTIONS: DO NOT READ OUT, CODE ALL THAT APPLY

A price increase notification from your previous supplier	1
You were offered a lower price contract or tariff	2
You were not satisfied with the customer service from your previous supplier	3
A new supplier promised better customer service	4
A new supplier offered greater assistance on energy reduction initiatives	5
A renewal notice from your existing supplier	6
Knowing your contract was coming to an end	7
A broker/consultant recommended switching	8
We reviewed energy costs	10
Following preparation of our annual accounts	11
Seeing our contract end date on our bill	12
Seeing date for notification of termination of contract on our bill	13
DISPLAY IF QS7=3: A supplier offered savings for having a combined gas and electricity contract	9
Any other reason (Please specify)	98
None of these [SINGLE CODE] [DO NOT READ OUT]	96
Don't know [SINGLE CODE] [DO NOT READ OUT]	99

ASK NON-SWITCHERS (QD3=8,99 AND QD4=8,99 AND QD8a=2/99)

QD 10 (QE3). And have you ever considered switching energy supplier or tariff?

INTERVIEWER DO NOT READ OUT

Yes	1
No	2

ASK ALL WHO HAVE NOT SWITCHED IN LAST 12 MONTHS, NOR ATTEMPTED TO – (QD5=2,99 OR QD3=8/99) AND (QD6=2,99 OR QD4=8/99) AND (QD8a=2/99/UNANSWERED)

QD12a. Which of the following reasons, if any, contributed to why you haven't switched supplier or tariff in the last 12 months?

Was there any other reason you didn't switch?

READ OUT

INTEVIEWER INSTRUCTION – CHOOSE AS MANY AS APPLY

You were broadly satisfied with your existing supplier	1	Supplier preference / perceptions
You prefer to stay with supplier you know	13	
Switching would not result in significant savings	2	Financial
You wanted to avoid exit fees for leaving your existing contract	6	

You were tied to your existing contract	4	Contractual / pricing / complexity
Comparing prices between suppliers was too difficult	5	
	10	Hassle factor
You were too busy	19	
	12	
It was too difficult to switch	7	
Switching is too much hassle	8	
Switching would take too long	9	Process problems
You didn't want to deal with salesmen	14	
Other (write in)	98	
None of these	99	

Ask if more than three options selected at QD12a

QD12b. Which of these was most important? Choose up to three

INTERVIEWER DO NOT READ OUT PROMPT IF NECESSARY

Satisfied with your existing supplier	1	Supplier preference / perceptions
Prefer to stay with supplier you know	13	
		Financial
Switching would not result in significant savings	2	
You wanted to avoid exit fees for leaving your existing contract	6	
		Contractual / pricing / complexity
You were tied to your existing contract	4	
Comparing prices was too difficult	5	
	10	Hassle factor
You were too busy	19	
	12	
It's too difficult to switch	7	
It's too much hassle	8	
Switching would take too long	9	Process problems
You didn't want to deal with salesmen	14	
None of these	99	

ASK ALL SWITCHERS/ COMPARERS/ATTEMPTED SWITCHERS IN THE LAST 12 MONTHS

Qd5 = 1 OR qd 6 = 1 OR qd7 = 1 OR 2 OR QD8a=1

QD14. The last time you

[switched [**insert fuel from dqs8**] supplier IF QD5 =1]/
 [changed [**insert fuel from dqs8**] tariff IF QD6 = 1]/
 [tried to switch [**insert fuel from dqs8**] supplier QD8a=1]/
 compared [**insert fuel from dqs8**] suppliers or tariffs IF qd7 = 1 OR2],

what were your priorities?

Text fill should work in that priority order if respondent has done more than one of those things (i.e. switch supplier, change tariff, tried but failed, compared).

INTERVIEWER DO NOT READ OUT

Cost savings	1
Better customer service	2
Advice on saving money	3
Advice on energy efficiency	4
Green or low carbon energy	5
Smart metering	6
UK based call centre	7
Just followed broker / 3 rd party recommendation	8
Other (specify)	10

ASK IF MORE THAN ONE CODE AT QD14

ASK ALL WHO SAY COST SAVINGS (qD14 = 1 OR qd15 =1)

QD16. And when you say costs saving do you mean you switched in order to:

INTERVIEWER READ OUT

Get the best available price in the market	1
To reduce your monthly expenditure	2
To avoid a price increase	3

ASK ALL SWITCHERS IN LAST FIVE YEARS qd3 = 1 – 7 OR qd4 = 1-7

QD30. Thinking back to the last time you switched [**INSERT ANSWER FROM dQS8**] supplier or tariff, how much of a saving did you make in comparison to your previous contract? If you're not sure please use your best estimate on a monthly, quarterly or annual basis, whichever is easier for you?

WRITE IN ESTIMATED SAVINGS AMOUNT £

Monthly	1
Quarterly	2
Annual	3
Don't know	

ASK ALL SWITCHERS IN LAST 12 MONTHS (QD5=1 OR QD6=1)

Dx How satisfied or dissatisfied were you with the overall process of switching your [INSERT ANSWER FROM DQS8] SUPPLIER (QD5=1) TARIFF (IFQD6=1)

DO NOT READ OUT

VERY SATISFIED	1
QUITE SATISFIED	2
NEITHER SATISFIED NOR DISSATISFIED	3
QUITE DISSATISFIED	4
VERY DISSATISFIED	5

ASK IF SWITCHED TARIFF/SUPPLIER IN PAST 5 YEARS QD3 = 1-7 OR QD4 = 1-7 QD17 ((QD1). When choosing your current [INSERT ANSWER FROM dQS8] contract or tariff did you consult or were you approached by, any of the following?

INTERVIEWER INSTRUCTIONS: READ OUT

Broker	1
Internet search engine	2
Price comparison site	3
Review site	4
Price quotation tool on any supplier’s website	5
Current supplier	6
Previous supplier	7
Other suppliers	8
Don’t know [DO NOT READ OUT] [SINGLE CODE]	99
None of these [DO NOT READ OUT] [SINGLE CODE]	96

QD18

(QD2). And how did you mainly choose your current [INSERT ANSWER FROM dQS8] contract or tariff?

INTERVIEWER INSTRUCTIONS: READ OUT IF NECESSARY. SHOW ONLY OPTIONS SELECTED AT QD17

CHANGED TO HAVE SAME LIST AT QD17

Broker	1
Internet search engine	2
Price comparison site	3
Review site	4
Price quotation tool on any supplier’s website	5
Current supplier	6
Previous supplier	7
Other suppliers	8
Don’t know [DO NOT READ OUT] [SINGLE CODE]	99
None of these [DO NOT READ OUT] [SINGLE CODE]	96

ASK IF CODE 5-7 AT QD17

QD19. You mentioned that you had been in contact with energy suppliers when researching tariffs. Did the supplier contact you or did you contact them? **SINGLE CODE**

Supplier contacted me	1
I contacted supplier	2
Both	3
Can't remember	99

ASK ALL WHO USED A BROKER AT QD 18 = 1 (OR Broker was only option selected at QD17)

QD20 (QD5). When you used a broker, did they charge you for their services?

INTERVIEWER INSTRUCTIONS: DO NOT READ OUT SINGLE CODE

Yes	1
No	2
Can't remember	99

ASK ALL WHO USED A BROKER AT QD 18 = 1 (OR Broker was only option selected at QD17)

QD21 (QD10x). Overall, how satisfied or dissatisfied were you with the service provided by your broker when changing to your current **[INSERT ANSWER FROM dQS8] contract or tariff?**

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

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

ASK ALL

QD23 (QF22). If you were to switch supplier, how likely would you be to use a broker?

Very likely	1
Quite likely	2
Quite unlikely	3
Very unlikely	4

QD 24. To what extent do you agree or disagree that. **INTERVIEWER INSTRUCTION - Choose one in each pair only**

QD 24a.

Energy brokers provide independent unbiased advice	1
Energy brokers would do a better job at comparing energy deals than I could	2
Your energy is always going to cost you more if you use an energy broker because you're ultimately paying for their time.	3

STRONGLY AGREE
SLIGHTLY AGREE
NEITHER AGREE NOR DISAGREE
SLIGHTLY DISAGREE
STRONGLY DISAGREE

**ASK ALL WHO USED A PRICE COMPARISON SITE (QD17 = 3)
 READ OUT: EARLIER YOU ALSO MENTIONED THAT YOU USED A PRICE
 COMPARISON WEBSITE WHEN COMPARING TARIFFS.**

QD25. Which price comparison sites did you use?
INTERVIEWER DO NOT READ OUT

	Domestic	Business	
Compare the market	Y	Y	1
Confused.com	Y	Y	2
Energyhelpline	Y	Y	3
Energylinkx	Y	Y	4
Love Energy Savings	Y	Y	5
Make it Cheaper		Y	6
Martin Lewis / Money Saving Expert	Y		7
Money Supermarket	Y	Y	8
Quotezone	Y	Y	9
Simply Switch	Y	Y	10
uSwitch	Y	Y	11
Utilitywise		Y	11
Other – write in			97

ASK ALL WHO USED A PRICE COMPARISON SITE (QD17 = 3)

QD26. Why did you use a price comparison site?
CHOOSE AS MANY AS APPLY DO NOT READ OUT MULTIPLE CODE

Independent information on tariffs/ suppliers	1
Get information before contacting suppliers	2
To stay in control	3
To avoid sales pressure	4
To avoid spending time on the phone	5
Just prefer online	6

QD27. How did you use the price comparison site?
**CHOOSE AS MANY AS APPLY DO NOT READ OUT AND CODE. PROMPT ONLY
 WHERE NECESSARY**

To compile a short list of suppliers to investigate / approach	1
Used the tariffs displayed to understand what I should be paying	2
Used the tariffs displayed as a benchmark for a negotiation with my own supplier	3
Used the tariffs displayed as a benchmark for a negotiation with other suppliers	4
To request a follow up call from the top selected supplier / s	5
To decide on which supplier to go with and then approached that supplier by phone	6
To decide on which supplier to go with and then made the contract arrangement online	7
Other: write in	

ASK ALL NON SWITCHERS IN LAST FIVE YEARS

QD31. Now we would like you to think about your gas and electricity bills together.]
 Approximately, what would be the minimum amount of money you would have to save on your annual **[IF QS8=1: gas and electricity] [IF QS8=2: electricity] [IF QS8=3: gas]** bill when switching supplier to make it worth doing?

WRITE IN ESTIMATED SAVINGS REQUIREMENT £

Monthly	1
Quarterly	2
Annual	3

ASK ALL

QD32 (E7.) In terms of the switching process, to what extent do you agree or disagree that...?

RANDOMISE ORDER

FOR EACH PROBE: WOULD YOU SAY THAT YOU (DIS) AGREE STRONGLY, OR JUST (DIS) AGREE?

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Don't know
It is easy to compare prices between tariffs and suppliers	1	2	3	4	5	99
The process of switching suppliers is easy	1	2	3	4	5	99
Switching supplier takes too long	1	2	3	4	5	99
The expected savings do not always materialise	1	2	3	4	5	99
I worry that if I switch, things will go wrong	1	2	3	4	5	99

ASK ALL INTERVIEWER READ OUT MULTI CODE

QD33. Would you welcome contact from the following people about renewing or changing your energy tariff or contract?

INTERVIEWER READ OUT

My own supplier	1
Other suppliers	2
A broker	
None of the above	3

SECTION 5: UNDERSTANDING OF PRICE DIFFERENTIALS

ASK ALL

QE1(QD5).

Thinking now about your own business **[INSERT ANSWER FROM dQS8]** tariff (s) how confident are you that...

QE1a. You are on the best **[INSERT ANSWER FROM dQS8]** tariff available from your current **[insert fuel]** supplier?

QE1b. Your **[INSERT ANSWER FROM dQS8]** tariff is competitive with what other suppliers in the market are offering?

QE1c. When looking for **[INSERT ANSWER FROM dQS8]** deals, you can judge whether you're getting a good deal?

INTERVIEWER – PROMPT TO PRECODES

Very confident	1
Quite confident	2
Not very confident	3
Not at all confident	4

QE2 (QD8). Given your other costs and priorities, realistically, how important is it to you as a business that you are on the best possible tariff?

Very important	1
Quite important	2
Not very important	3
Not at all important	4

QE4 (QD2). AND WOULD YOU BE ABLE TO SAY APPROXIMATELY HOW MANY KILOWATT HOURS YOU USE EACH YEAR ON YOUR BUSINESS ELECTRICITY OR GAS BILL? INTERVIEWER READ OUT

Yes	1
Yes if I had my bill in front of me	2
Not sure even if I had my bill in front to me	3
Probably not, even if I had my bill in front of me	4

QE5(QD3). And would you be able to say roughly how much you are paying for each kilowatt hour you use? **INTERVIEWER READ OUT**

Yes	1
Yes if I had my bill in front of me	2
Not sure even if I had my bill in front to me	3
Probably not, even if I had my bill in front of me	4

SECTION 6: BUSINESS CULTURE AND NON ENERGY PURCHASING BEHAVIOUR

ASK ALL

QF1 (QE1). Thinking now about all of your business costs and not just energy, do you agree or disagree with the following statements ...?

INTERVIEWER READ OUT

QF1a. Our business is very focused on cost savings

QF1b. We actively review business costs on an ongoing basis

INTERVIEWER - PROMPT TO PRECODES

Strongly agree	1
Slightly agree	2
Slightly disagree	3
Strongly disagree	4

ASK IF QF1b (actively review business costs) = 1 2 OR 3 (strongly agree, slightly agree or slightly disagree)

QF2 (QE5). And do you include your energy costs in your review of business costs?

Yes	1
No	2
Not sure	99

ASK ALL

QF3 (QE6). Thinking now about other major products and services other than energy that you buy for your business, how confident are you in getting a good deal for those?

INTERVIEWER – PROMPT TO PRECODES

Very confident	1
Quite confident	2
Not very confident	3
Not at all confident	4

QF4 (QE7). And again thinking about other things that you would buy for your business, which of these would come closest to describe the way you or your business approach such purchases.

INTERVIEWIER READ OUT. REVERSE ORDER OF LIST BETWEEN INTERVIEWS

Always focused on getting the best deal	1
We mainly focus on getting best deal for major costs	2
We're not particularly focused on negotiating over prices and deals	3

QF5 (QE8). And thinking about your attitudes to relationships with suppliers to your business generally which of these comes closest to the way you approach these?
INTERVIEWIER READ OUT. REVERSE ORDER OF LIST BETWEEN INTERVIEWS

We tend to use suppliers we are familiar with	1
We tend to be loyal to a small number of suppliers unless it is a major business cost	2
We change suppliers to get the best deal on anything we buy	3

QF6. If you were seeking information or advice about anything to do with business how would you prefer to do it ... ?
INTERVIEWIER READ OUT. PROMPT IF NECESSARY. ANY OTHER WAY?
MULTICODE

Face to face	1
Over the phone	2
By email	3
Via a website	4
Over social media	5
Via online chat	6
Other (write in)	7

QF7. And if you were seeking independent information or advice about anything to do with business would you get trusted information from...?
INTERVIEWER READ OUT AND ROTATE ORDER. PROMPT ANY OTHER?

Government .gov website	1
Regulators (e.g. Ofgem, Ofcom etc.)	
Chamber of commerce	2
A small business organisation such as the Federation of Small Business	3
An industry specific trade association such as the British Independent Retailers Association	4
Local small business networks	5
Online small business networks	6
Citizen's Advice	7
Blogs, or other advice websites	8

DO NOT READ OUT CODE ONLY

Consultant	9
Solicitor / accountant	10
Bank	11
Local authority	12
Specialist financial adviser	13
Other – write in	13

SECTION 7. CLASSIFICATION

SHOW TO ALL:

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

ASK ALL, SINGLE CODE

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

INTERVIEWER INSTRUCTIONS: DO NOT READ OUT

Yes	1
No	2
Not sure	99

ASK ALL, SINGLE CODE

QI8. Can I ask how many years has your business been trading for?

INTERVIEWER INSTRUCTIONS: DO NOT READ OUT

[WRITE IN WHOLE NUMBER]	
Don't know	99

ASK ALL, OPEN NUMERIC AND SINGLE CODE

QI1A. Can you please tell me the approximate turnover of your business in the past 12 months?

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

£	[WRITE IN NUMBER IN WHOLE POUNDS]	
Don't know		99
Refused		97

ASK IF QI1A=99 OR 97, SINGLE CODE

QI1B. Are you able to tell me if your turnover falls into any of the following ranges?

INTERVIEWER INSTRUCTIONS: READ OUT UNTIL ANSWER GIVEN

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

ASK ALL, MULTI CODE EXCEPT CODE 3 WHICH IS EXCLUSIVE

QI2a. That’s the end of the survey, thank you very much for your time. Citizens Advice or Ofgem, may wish to follow up with you. Could I have your telephone number or email address?

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

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

THANK AND CLOSE

This survey has been carried out by ICM, on behalf of Ofgem and Citizens Advice. Thank you very much for your time. The research report will be available on Ofgem’s website in Spring 2017.

ONLY IF NECESSARY

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