Customer Engagement Survey

Report prepared for Ofgem

29 August 2008

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Introduction and Methodology

Ipsos MORI was commissioned by Ofgem to conduct a survey among domestic energy customers to investigate their attitudes and behaviour in respect of Great Britain's energy supply market and help to establish the extent to which the market is "working" for consumers. The study is to examine awareness, participation in switching, experience of the process, satisfaction with switching and intentions to switch again and barriers to future switching. Because of a particular interest in switching behaviour amongst prepayment meter (PPM) customers, their numbers were boosted to ensure a robust sample size.

Ipsos MORI conducted 2,024 quota-controlled face to face interviews in the period 20 June – 27 July 2008 in 165 systematically–selected sampling points throughout Great Britain. The total included a nationally representative sample of 1,716 customers, with a booster sample of an additional 308 PPM customers providing a total of 534 PPM customers. Data were weighted to the profile of domestic energy customers, using the variables of sex, age, social group and working status. The booster of PPM customers was weighted back to its correct incidence with the total figures (12%). Based on data supplied to Ofgem by domestic energy suppliers, the sample appears to over represent direct debit customers and under represent standard credit customers. However, the split achieved in this survey is consistent with previous Ofgem surveys. Moreover, as the data from suppliers is based on meter points rather than individuals, the data are not weighted to match the suppliers' profiles. In any case to do so only makes a difference of around 2 – 4% on the total figures and does not change the main messages emanating from the data.

Summary of Key Findings

There is almost universal awareness of domestic customers' ability to switch energy suppliers. Awareness of the suppliers is fairly good – just 3% were unable to name any supplier spontaneously and a mean of just under three brands was mentioned overall. Even disadvantaged groups (eg. social class DE, renters, PPM customers and quarterly paying customers) can name on average more than two suppliers spontaneously, as can non-switchers.

There is a regional effect on supplier awareness, especially in Scotland, and also, to a lesser extent in Wales. The result of this is higher awareness for the Scottish and Welsh brands in their respective markets, but there is no evidence this reduces the number of companies customers in Scotland and Wales are aware of. Prompted awareness underlines the fact that customers are aware of a large number of companies/brands – an average of more than eight; even non-switchers are aware of more than seven. The Big Six brands are a long way ahead of the smaller brands in the market in terms of awareness, particularly British Gas because of its historic national gas supply monopoly.

Most customers are open-minded about the brands they would consider, though one in three can name at least one supplier they would avoid. Most of these are Big Six brands, led by British Gas. While some brands may be rejected perhaps because customers have already switched away from them, the minor brands are more likely to be rejected because they are simply not heard of.

The proportion who have switched gas supplier in the last 12 months is 24%; for electricity it is 23%. Recent switching of this kind shows a different pattern by sub-groups, compared to the profile of those who have "ever switched". There is no difference by social class in recent switching, and incidence of recent switchers is actually higher than average among those in rented accommodation and PPM customers.

To date, most customers have switched supplier for at least one fuel: 62% overall, 60% gas and 55% electricity. These switching rates are generally higher than most other financial services and utilities, such as mortgages (31%), home insurance (28%), fixed line telephones (20%) and mobile telephones (17%)[1]. These figures show considerable variation by customer group, illustrating how early adoption of switching was by higher social classes and the middle-aged. Disadvantaged customers such as the DE social group or those in rented accommodation are lagging behind. PPM customers are a little less likely than Direct Debit customers to have switched to date, notwithstanding recent switching figures, but the lowest penetration of switchers is found among the quarterly cheque/cash payers. By nation there has been some measurable difference in electricity switching, with Scotland and Wales lagging behind England, which may relate to: (i) the strong regional identities of the former

[1] National Consumer Council 2005, cited in OFT/Ipsos MORI, 'Personal current accounts in the UK', 2008

regional electricity incumbents; (ii) the relatively high number of electricity only customers who therefore cannot benefit from dual fuel deals; and (iii) a number of customers using dynamic teleswitches which makes it difficult to switch supplier.

Experience of switching is widespread, but not frequent – most switchers (52% of either fuel) have only switched once. Multiple switchers are in a minority and are more likely to be found among the higher social classes, or, perhaps surprisingly, PPM customers. The trend in switching is towards using a single company for both fuels: 71% of recent switchers switched both fuels in the past year and now use one company only. Some disadvantaged groups are less likely to have switched both fuels.

Of those who have switched supplier in the past year, over half (53%) did so as a reaction to contact with a salesperson, whether in person or on the phone. These are more likely to be from disadvantaged groups, including PPM customers. Most of them claim their decision to switch was based on the assertion they would save money and that it would be cheaper than their current supplier. When asked to be specific about the salesperson's claims, 68% said the claim was to be cheaper than the current supplier. However 18% reported their salesperson as claiming to be cheapest on the market. This proportion is higher for disadvantaged groups, for example the state-supported group E. PPM customers are more likely to have been told this too, but quarterly cheque/cash payers are most likely of all.

Recent switchers are mostly satisfied with all aspects of the experience. More than three-quarters (77%) are satisfied with how smoothly the switch took place and their choice of supplier. Fewer, but still a majority, are satisfied with the amount they believe they saved (61%), though only 11% are dissatisfied. The remainder do not know or are unable to judge. Some vulnerable groups are notably dissatisfied with the savings made, including PPM customers. For example, 23% of PPM customers are dissatisfied with this aspect. They are also more dissatisfied with the accuracy of information given (20% of PPM customers), though PPM customers are more satisfied than others with how smoothly the switch took place (84% of gas PPM customers satisfied).

Despite fairly good awareness of competing companies, most recent switchers completed their transaction without a complete picture of offers in the market – just 30% considered other deals. Disadvantaged customers are more likely to have made their decision without comparison with other deals – just 15% of DEs, 19% of PPM customers and 12% of quarterly electricity customers considered other deals. Where a salesperson was involved just 15% of all recent switchers considered other deals.

Price comparison websites were the principal source of other information at the time of the switch – used by 60% of recent switchers who considered other deals. This compares favourably to the personal current account market, for example, where only around a fifth are reported to use such sites[2]. PPM customers rely

[2] OFT/Ipsos MORI, 'Personal current accounts in the UK', 2008

disproportionately on the advice of friends and family (29%, compared to 10% for all customers); quarterly payers are often more dependent on other suppliers' salespeople (34% for electricity quarterly, compared to 8% for all customers).

Internet access is skewed towards higher social classes and the under 64s. PPM customers and especially quarterly payers have a lower internet penetration. Switchers are more likely to have internet access than non-switchers. Access is perhaps less of an issue than actual usage – only a minority of those with access use the internet to compare gas and electricity prices (38%). Particularly low users comprise the disadvantaged groups including PPM customers and quarterly payers. Even fewer use the internet to find out about the suppliers themselves or the process of switching. Just 25% of those with access to the internet who have switched recently did so on the internet. This falls to little over one in ten of the various disadvantaged groups.

Future intentions to switch energy supplier are fairly low – just one in three are at least fairly likely to switch at some time in the future, falling to 23% in the next 12 months. Recent switchers are more likely to switch again – 34% are at least fairly likely to switch (again) in the next 12 months, compared to 19% o non-switchers. Intentions to switch among disadvantaged groups such as DEs and PPM or quarterly payers are much lower – the higher social class groups are perhaps more likely to plan further switching, whereas switching by PPM users, for example, is more reactive to sales calls. Those who have never switched before are much more likely to reject switching in future – 69% of non-switchers say they are unlikely ever to switch: 26% of all customers.

Customers are often unsure what savings they would need to be offered to make them switch. Those able to give figures tend to express them in a range of different frequencies (weekly, monthly etc), greatly complicating any potentially meaningful communication with them. Many customers do not have any idea at all of the savings they might require to make them switch – dual fuel customers are most likely to be able to come up with a figure. Some of the figures given for desired savings are clearly unrealistic, the result of either ignorance of what is possible, or deliberately inflated demands in some cases, perhaps to justify reluctance to switch on other grounds. The median annual saving required to switch dual fuel is £178, falling to £162 for previous switchers and to £119 for those likely to switch in future. Non-switchers are most likely to give very high figures, though it is, of course, realistic that someone who has never switched could make larger savings than a previous switcher.

Most people feel confident about switching in general terms, but a majority find the number of tariffs confusing and think it is too hard to work out whether they would save by switching. Customers have contradictory views of suppliers; a majority being happy with their supplier, but almost as many believing some companies are more trustworthy than others. They are deeply split on whether suppliers try and do the best for their customers, whether there are real differences between them and whether it pays to stay loyal. They are also split on whether it is pointless to switch because suppliers all increase their prices at the same time. A strong majority is willing to condemn salespeople as untrustworthy, yet general attitudes show that most people prefer to talk to a salesperson when buying something.

Scepticism about salespeople is highest among the DEs and especially PPM customers, perhaps surprisingly, given the proven importance of salespeople in facilitating switching among these groups. Disadvantaged groups more broadly tend to show more loyalty towards suppliers and to perceive less difference between them.

Worries and concerns about switching are a major issue. Almost half worry that if they switch things will go wrong and over half worry the service may be worse. Switching rates in the past year among these are lower than those of all customers. These worries highlight the differences between perception and reality, particularly among disadvantaged groups. The reality is that the vast majority of switchers are satisfied with how smoothly the switch went, yet 58% of non-switchers worry that things will go wrong. The alternative view of this is that one in ten switchers being dissatisfied with the process is actually unacceptably high as a failure rate; particularly given their likelihood of telling many others about their problems. In this context, customers may have a perception that their concerns are justified, and this presents a bigger communications challenge. In support of this, there are significant levels of concern even among those who have experience of previous switching.

Despite saving money being the key motivation to switch (as shown by our recent omnibus research) there are widespread doubts among customers about the benefits in terms of money saved. Whilst just under half agree switching is a good way to save money (and even among switchers this rises to only 57%), a majority (51%) believe the savings are not worth the hassle of switching or that they will only last a short time (57%). Non-switchers are much more likely to agree with both statements, but significant proportions of switchers also agree (45% and 48% respectively). Furthermore, just a third of customers say they check regularly to see if it is worth switching.

Our customer segmentation defines six segments which provide an alternative way of viewing domestic energy supply customers. This shows that, for some segments, the market is vibrant and dynamic. The Confident Deal Seekers and the Unhappy Potential Switchers, together constituting one in three customers are previously likely to have switched, and are likely to be the source of much future activity. The Disengaged, despite their high level of past switching, are disillusioned and cynical about suppliers and the ability of the market to deliver benefits that will help their (often dire) financial position. Loyalists and the Underconfident and Nervous are by no means non-switcher groups, but their future likelihood of switching is generally poor. The Loyalists, confident in their knowledge of the system, need a very persuasive deal to agree to a switch, though recent price rises may provide the kind of dissatisfaction to prompt action from them. The Underconfident and Nervous require reassurance about everything that could go wrong, though their impulsive nature means they could still be prey to direct sales approaches. Finally the Older-Happy As They Are segment - about a quarter of customers - are likely to show least switching activity of all, and least engagement with the market. For them, the market is working to some extent in the longer term (almost half of them have switched) but it is a very slow process. Just 4% intend to switch in the next 12 months, so on average, their level of churn is very low.

Implications

The rising levels of switching imply that the domestic energy supply market is working, but the evidence of this survey is that some customers are not experiencing the full efficiency and benefits of the market.

Domestic energy customers are well aware of the ability to switch supplier and, at the same time, aware of enough of the players in the market to ensure that a functional market can operate. Some structural distortions due to historic factors (previous British Gas monopoly, hegemony of regional companies in Scotland and, to a lesser extent, Wales) still affect the shape of the market, but are not major barriers. The size of the Big Six means they do have some advantages over the smaller brands, but the mass of competing tariffs offered by them whilst presenting choice, means comparisons can be difficult.

This survey shows encouraging levels of switching compared to earlier work, despite exposing some underlying weaknesses of the market. Notably encouraging is the profile of recent switchers in the last 12 months which goes some way towards correcting the imbalance in the profile of those who have "ever switched", focusing as it does on a greater proportion of disadvantaged groups such as DEs, those in rented accommodation and especially PPM customers. This represents a weakening of one of the key barriers to market success, the disparity in participation by socio-economic factors. There is some evidence, however, that this has happened primarily through the medium of salesperson visits, and this emphasises a separate set of problems, which may act against the smooth working of the market in the longer term. A significant proportion of "reactive" sales were made with no consideration of competing offers from other suppliers, particularly those involving salespeople. This is, of course, part of a salesperson's job, but if it means some customers have been saddled with products that are not optimum for them then it will be detrimental to the success of the market in the longer term. Worse still, some salespeople may have misled customers that their offer was actually the cheapest on the market. This may indeed have been so in some cases, but it seems unlikely all could be credible claims. Levels of satisfaction of PPM customers with the actual savings made through recent switches are notably lower than those of other switchers. To most customers, the credibility of energy salespeople is low, and given the desire of many customers to have salespeople help in making major purchases, this could in itself constitute a weakness in the market. Action may be required to police salesperson conduct more effectively to boost confidence in them in the longer term.

Lack of information on which to base a considered decision may be a factor in restricting the effective operation of the market. Despite high levels of satisfaction with recent switches, less than one in three recent switchers considered more than one offer. While most of those switchers who considered other deals made use of price comparison websites, it is by no means all of them, and some disadvantaged customers, in particular, were likely to rely on friends and family (in the case of PPM customers) or other salespeople (in the case of quarterly payers) for information. Disadvantaged customers have somewhat lower levels of internet access than others but, even where they have access, are much less likely to use the internet to find out about comparative prices and especially to actually make the switch. Boosting the levels of usage of the internet by disadvantaged customers would have the effect of empowering them, allowing them to compare across the whole market even when approached by salespeople and increase their chances of making the right choice of energy supplier and tariff. More people making the right decisions can only make the market more successful.

Future intentions to switch supplier are relatively low (though intentions for the next year match the current rates of annual switching). Of most concern is the group comprising one quarter of all customers who have never switched and do not intend to do so. These are in danger of missing out completely on the benefits of switching to a better deal. Many customers have over-optimistic expectations of what they could save by switching, especially those with little experience of it. Although this does naturally vary according to individual circumstances, it seems clear that if reality cannot match expectations then customers are likely to be disappointed. This could also be a measure of the communication of likely savings in the past, which may not have been wholly successful. It is certainly a challenge, since the findings show that customers habitually consider savings at several different frequencies, some thinking in terms of weeks, others months etc. This makes the task of managing expectations very difficult at least unless and until a true "currency" of savings, perhaps akin to the financial industry's APR, is established.

It is clear that, while many people are comfortable with the energy supply market as it stands, many are also confused on specific details such as the range of tariffs or the difficulty of calculating whether one would actually save money. These, and others, constitute real attitudinal barriers to switching. No wonder many are under confident and nervous about the implications of making a switch. Findings suggest there are many aspects of the market and the suppliers that people know little about for sure, and that many judgements e.g. about the value of loyalty to suppliers or the credibility of salespeople, may be made based on gut feelings and perhaps media coverage, as much as experience and reliable information. Again the need is for better, more authoritative information to support decision-making, coupled with a strong note of reassurance on the areas that cause real anxiety. In most cases it can be shown that these perceptions of potential risk in the switching process are at odds with the reality of most customers' experiences of it.

A key area for reassurance and affirmation of the efficacy of the competitive process is that of saving money – the cornerstone of the appeal of switching supplier. Customers are far from convinced that this will follow from switching supplier and, most damning of all, only 57% of switchers agree that switching is a good way to save money. If a positive message is not going out from previous switchers then it is no surprise the intention to switch from the public at large is relatively weak.

Our segmentation shows that the barriers within the domestic energy supply apply more to certain segments than to others. Some wider issues have particular resonance for specific groups within the customer base, not affecting greatly those who are enthusiastic customers in the market, but providing the motivations (and excuses!) for many of the less enthusiastic groups, reinforcing their negative feelings about switching. The information needs of the segments are therefore subtly different, though this is mainly a difference in emphasis rather than substance – it should be possible to devise a set of messages that both reassure and establish best practice in getting the most out of switching supplier, messages that are relevant to all segments, from which customers can take what they need.

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Awareness

Awareness of the Market

Q1 **Were you aware before today that it is possible for domestic customers to switch to different gas or electricity suppliers?**
Base: All domestic gas/electricity customers who are responsible/jointly responsible for bills (2024)

		Age			Payment Method					
					Gas			Electricity		
	Total	16-34	35-64	65+	Direct Debit	Cheque /cash	PPM	Direct Debit	Cheque /cash	PPM
	(2024) %	*(497)* %	*(1097)* %	*(430)* %	*(919)* %	*(256)* %	*(380)* %	*(1062)* %	*(301)* %	*(486)* %
Yes	97	94	98	97	98	96	95	98	97	95
No	2	4	1	2	1	3	3	1	2	4
Don't know	1	2	1	1	1	1	2	1	1	1

Source: Ipsos MORI

Q1 **Were you aware before today that it is possible for domestic customers to switch to different gas or electricity suppliers?**
Base: All domestic gas/electricity customers who are responsible/jointly responsible for bills (2024)

		Social grade				Region			Tenure	
	Total	AB	C1	C2	DE	England	Scotland	Wales	Rented	Non rented
	(2024) %	*(377)* %	*(488)* %	*(443)* %	*(716)* %	*(1724)* %	*(167)* %	*(132)* %	*(806)* %	*(1202)* %
Yes	97	98	98	97	94	97	98	96	95	98
No	2	1	1	2	4	2	1	1	3	1
Don't know	1	1	*	1	2	1	1	2	2	1

Source: Ipsos MORI

Almost all domestic energy customers are now aware of their ability to switch gas or electricity supplier. While there is some hint from the data that the tiny minority still unaware are more likely to be younger people, PPM customers, social class DE and those in rented accommodation, the difference is not statistically significant.

Awareness of Suppliers

Q2 **Can you please tell me what companies or suppliers you are aware of that can currently sell you electricity or gas?**

Base: All domestic gas/electricity customers who are responsible/jointly responsible for bills (2024) (Spontaneous)

		Age		Region			Payment Method: Gas			Payment Method: Electricity		
	Total	Under 65	65+	England	Scotland	Wales	Direct Debit	Change /cash	PPM	Direct Debit	Change /cash	PPM
	(2024)	(1594)	(430)	(1724)	(167)	(132)	(919)	(256)	(380)	(1062)	(301)	(486)
	%	%	%	%	%	%	%	%	%	%	%	%
British Gas	79	81	73	80	66	81	82	86	82	79	77	82
npower	39	43	27	40	33	36	40	43	44	39	37	46
ScottishPower	32	34	26	29	73	16	34	28	28	34	26	27
E.ON UK	30	31	26	32	21	23	33	28	24	33	27	24
Powergen	25	29	15	26	17	23	26	24	22	27	22	24
Southern Electric	23	22	24	26	2	6	25	18	19	25	19	22
EDF Energy	18	21	11	20	10	10	19	14	26	18	17	25
Swalec	6	6	7	2	1	74	6	5	9	6	7	8
Scottish Hydro	5	5	6	1	52	1	6	3	4	6	3	2
Manweb	4	4	5	4	2	13	5	5	3	5	4	2
SWEB Energy	4	4	3	3	1	15	5	2	1	5	3	2
Scottish and Southern Energy	3	3	4	3	5	3	4	2	2	4	3	1
Sainsbury's Energy	3	3	2	3	-	1	4	1	1	4	2	1
Centrica	2	3	2	2	5	6	4	1	*	3	1	*
London Energy	2	3	1	3	*	-	3	1	*	3	2	1
Atlantic Electric and Gas	2	2	2	3	-	1	4	1	1	3	1	1
SEEBOARD Energy	2	2	2	2	-	4	3	2	1	2	2	1
Scottish Gas	2	2	1	*	16	-	1	2	2	1	2	2
Eastern Electricity	1	1	1	1	-	-	1	1	*	1	1	*
Yorkshire Electricity	1	1	1	1	-	-	1	-	1	1	-	1
Ecotricity	1	1	1	1	1	-	1	1	1	1	*	1
Virgin	1	1	1	1	-	1	1	1	-	1	-	-
Utilita	1	*	1	1	-	1	1	-	1	1	-	-
Norweb	1	1	*	1	-	-	1	1	1	1	1	1
Green Energy UK	1	1	1	*	1	4	1	1	-	1	1	-
First Utility	1	1	-	*	2	2	1	1	-	1	1	-
Countrywide	1	*	1	1	1	-	1	1	*	1	1	-
Telecom Plus	*	1	-	*	1	1	*	1	*	*	*	*
Nwy Prydain	*	1	-	*	1	2	1	1	*	*	1	*
Northern Electric	*	*	1	*	*	-	*	-	1	*	-	1
Union Energy	*	*	*	*	-	1	*	1	*	*	1	-
Good Energy	*	*	1	*	-	-	*	1	1	*	1	*
EBICo	*	*	*	*	*	-	*	*	1	*	-	1
Spark Energy Supply	*	*	-	*	-	-	*	-	-	*	-	-
The National Trust Green Energy	*	*	-	*	-	-	*	-	*	*	-	-
Big six	96	97	94	96	95	97	97	97	96	97	95	96
All others	12	12	12	12	9	9	15	9	5	14	11	5
Other	5	5	5	5	7	2	6	3	1	6	5	2
None	1	1	1	1	*	-	*	*	1	1	*	1
Don't know	2	2	4	2	2	3	2	2	3	2	4	3
Mean no of companies mentioned	2.98	3.12	2.56	2.94	3.10	3.35	3.17	2.80	2.83	3.12	2.73	2.81

Source: Ipsos MORI

Overall 96% are able to name at least one of the Big Six companies spontaneously and 12% are able to name other companies. Just 3% are unable to name any companies or don't know. On average, customers are able to name just under three companies each. This average varies little by customer group: even social class DE, the 65+ and those in rented accommodation, as well as PPM customers, all manage to think of at least 2.5 companies on average (compared to 3.30 for the AB social group). The averages in Wales and Scotland are a little higher than those in England, but only the Wales average is significantly higher. The brands with regional identities are more likely to be mentioned in their region e.g. ScottishPower is the top brand in Scotland; Swalec is second only to British Gas in Wales. However, average numbers of companies mentioned are higher in Scotland and Wales than nationally so there is no evidence that the regional identities of certain brands restrict awareness of the competition. Customers who have ever switched either fuel in the past are aware of more companies than non-switchers, though non-switchers are still aware of 2.6 companies on average. Just 6% of non-switchers cannot name any companies that supply gas or electricity. However, non-switchers are significantly more likely than switchers to mention just one or two companies (54% of non-switchers compared to 34% of switchers).

Spontaneous awareness of the suppliers which are active in the domestic energy market divides into three tiers: British Gas is almost universally thought of among the top of mind brands, and is significantly salient in more customers' minds than any other company. It is likely to be one of the three brands mentioned by at least eight in ten customers. Below British Gas are the other members of the "Big Six" companies, led by npower, though there are two anomalies. Powergen continues to be a well known brand in its own right, despite now having been dropped and overtaken by the main E.ON brand. Southern Electric is the dominant national brand of Scottish and Southern Energy. The third tier of awareness belongs to the remainder, which is a combination of sub-brands of large groups e.g. Atlantic, older brands, which are sometimes still used e.g. Swalec or Seeboard, and smaller independent companies e.g. Utilita, Ecotricity.

Q2/3 Which, if any, of these gas and electricity suppliers have you heard of (including any you mentioned earlier)?

Base: All domestic gas/electricity customers who are responsible/jointly responsible for bills (2024) (Prompted)

	Total	Age		Region			Payment Method: Gas			Payment Method: Electricity		
		Under 65	65+	Eng-land	Scot-land	Wales	Direct Debit	Change /cash	PPM	Direct Debit	Change /cash	PPM
	(2024) %	(1594) %	(430) %	(1724) %	(167) %	(132) %	(919) %	(256) %	(380) %	(1062) %	(301) %	(486) %
British Gas	98	98	97	98	94	98	99	99	98	98	98	97
npower	83	87	71	85	73	73	84	86	84	84	82	85
E.ON	70	72	65	72	61	57	74	67	62	74	67	64
ScottishPower	65	66	61	62	96	54	69	55	58	68	55	57
EDF Energy	52	58	33	55	32	40	56	36	50	56	45	53
Southern Electric	47	48	46	51	27	33	51	40	40	52	42	41
Scottish Gas	38	39	36	33	89	37	42	31	34	41	32	32
Powergen	25	29	15	26	17	23	26	24	22	27	22	24
Scottish Hydro	16	17	14	10	78	11	18	10	9	18	10	8
Sainsbury's energy	16	16	14	17	4	7	19	12	11	18	10	12
ScottishPower Manweb	14	15	12	13	20	19	17	9	9	17	9	9
Swalec	14	14	13	9	3	91	16	8	13	16	12	12
Nwy Prydain	10	11	6	8	16	24	12	8	6	11	7	7
Green Energy UK	8	8	10	8	7	12	8	10	6	8	11	6
Atlantic Electric and Gas	7	8	6	8	7	4	10	4	4	9	5	5
Manweb	4	4	5	4	2	13	5	5	3	5	4	2
SWEB Energy	4	4	3	3	1	15	5	2	1	5	3	2
Countrywide	3	3	4	3	2	6	3	4	3	4	4	3
Telecom Plus	3	4	2	3	3	9	3	4	3	3	4	4
Scottish and Southern Energy	3	3	4	3	5	3	4	2	2	4	3	1
First Utility	3	3	2	3	4	8	4	3	3	4	3	4
The National Trust Green Energy	3	3	3	3	*	3	4	1	3	4	1	3
Ecotricity	3	3	2	3	2	-	3	2	3	3	2	2
Centrica	2	3	2	2	5	6	4	1	*	3	1	*
London Energy	2	3	1	3	*	-	3	1	*	3	2	1
SEEBOARD Energy	2	2	2	2	-	4	3	2	1	2	2	1
Good Energy	2	2	1	2	*	-	2	2	3	2	2	3
Union Energy	2	2	1	2	-	2	2	3	3	2	2	2
Utilita	2	1	2	2	1	2	2	*	2	2	*	2
EBICO	2	2	2	2	1	2	2	*	2	2	1	2
Spark Energy Supply	1	1	*	1	*	2	1	-	2	1	*	2
Others	7	7	7	7	7	1	7	5	6	7	4	7
None of these	*	-	*	*	-	-	-	-	-	-	-	-
Big six	100	100	100	100	100	99	100	100	100	100	100	100
All others	42	43	38	42	35	41	49	32	29	48	32	29
Mean no of companies mentioned	8.22	8.54	7.26	8.08	8.83	9.15	8.82	7.41	7.53	8.69	7.41	7.59

Source: Ipsos MORI

When prompted it becomes clear that customers have heard of many of the companies in the domestic energy market. All are aware of members of the Big Six and around four in ten are aware of other brands. On average, customers are aware of more than eight brands, though this falls to seven for social group DE. ScottishPower matches British Gas in Scotland, with Scottish Gas just behind. In Wales British Gas is better known than Swalec, but Nwy Prydain is relatively poorly known (mentioned by just 24%). Prompted awareness is generally better among switchers than non-switchers, though even non-switchers are aware of over seven companies on average.

Prompted awareness of British Gas is almost universal, and majorities of customers are aware of npower, E.ON UK, ScottishPower and EDF Energy. With prompting, the E.ON UK name moves well ahead of the old Powergen brand. Among the "newer" independent and white label energy brands, Sainsbury's Energy is best known, followed by Green Energy UK. All brands on our list have been heard of by at least one percent of energy customers.

Suppliers not considered

Q4 **And which, if any, would you definitely not consider switching to?**
Base: All domestic gas/electricity customers who are responsible/jointly responsible for bills (2024)

		Social grade			Age		Payment Method: Gas			Payment Method: Electricity		
	Total	**AB**	**C1C2**	**DE**	**Under 65**	**65+**	**Direct Debit**	**Change /cash**	**PPM**	**Direct Debit**	**Change /cash**	**PPM**
	(2024)	*(377)*	*(931)*	*(716)*	*(1594)*	*(430)*	*(919)*	*(256)*	*(380)*	*(1062)*	*(301)*	*(486)*
	%	%	%	%	%	%	%	%	%	%	%	%
British Gas	13	11	14	14	13	14	14	11	14	13	11	14
npower	9	6	10	12	9	9	8	10	12	8	11	13
EBICO	6	5	7	6	6	7	6	9	6	5	8	6
ScottishPower	6	3	7	7	5	9	6	7	7	5	7	7
Telecom Plus	6	5	6	6	6	7	6	7	6	6	7	8
Utilita	6	5	7	5	5	8	6	6	6	5	6	8
Union Energy	6	5	7	5	6	7	6	7	6	5	7	7
Atlantic Electric and Gas	6	5	6	6	5	8	5	9	5	5	8	6
Spark Energy Supply	6	5	6	6	5	7	5	6	5	5	6	6
Good Energy	5	4	6	5	5	7	5	8	5	5	7	5
Ecotricity	5	4	6	5	5	7	5	7	5	5	7	6
E.ON	5	3	5	7	5	7	5	6	6	5	5	6
Nwy Prydain	5	4	6	5	4	8	5	8	5	5	7	6
The National Trust Green Energy	5	3	6	5	4	7	5	6	6	4	6	7
Countrywide	5	4	6	5	4	7	5	7	5	4	7	5
Sainsbury's energy	5	3	5	5	4	8	5	7	5	4	6	5
First Utility	5	3	6	5	4	7	5	5	5	4	6	6
Green Energy UK	5	2	6	5	4	7	5	7	5	4	6	6
Swalec	5	2	6	5	4	7	5	5	6	4	6	6
EDF Energy	4	3	5	6	4	6	5	6	5	4	5	6
Scottish Hydro	4	2	5	5	4	6	4	6	5	4	6	5
Scottish Gas	4	2	5	5	3	7	4	5	4	4	5	5
ScottishPower Manweb	4	2	5	4	3	7	4	5	4	4	5	5
Southern Electric	4	2	4	5	4	4	4	4	4	4	3	5
None of these	61	70	58	58	61	63	61	62	53	63	63	54
Big six	29	22	32	32	30	28	29	29	37	27	29	36
All others	11	11	12	11	11	13	12	13	10	11	11	12
Atlantic/Ebico/ Ecotricity/Good Energy	7	7	8	7	7	9	8	10	7	7	9	8
Mean no of companies mentioned	4.07	3.47	4.37	4.00	3.55	5.78	3.97	5.10	3.69	3.81	5.13	4.02

Source: Ipsos MORI

Approximately one in three customers (33%) is able to give at least one supplier that they would not consider switching to. The majority of customers are, therefore, relatively open-minded regarding brands. Most of those giving any brands they would not consider mention at least one of the Big Six companies (29% of the total), led by British Gas. Other brands are mentioned by 11%. On average, customers mention just over four brands. There is some relationship between customer age and the average number of brands mentioned as rejected – for 16-34s it is just 2.96, while for the 65+ it is 5.78. By payment method, it is the quarterly cheque/cash payers that reject the most companies on average; PPM customers are similar to those on direct debit. There is similarly no evidence that social group DE rejects significantly more companies than other social groups.

However, experience of switching energy supplier does make some difference to views. Those who have already switched either fuel are more likely to reject at least one company, than those who have not switched, but they mention on average fewer specific companies than non-switchers (3.17 compared to 6.69). We can speculate that rejection by switchers may relate to the company or companies they have left, while rejection by non-switchers may relate more to poor awareness.

Reasons for not considering specific small suppliers

Q5 Why would you not consider switching to. . . (Atlantic, Ebico, Ecotricity or Good Energy)?
Base: All domestic gas/electricity customers who are responsible/jointly responsible for bills, who would definitely ***not*** *consider switching to Atlantic, Ebico, Ecotricity or Good Energy (153)*

		Age		Region			Payment Method: Gas			Payment Method: Electricity		
	Total	Under 65	65+	Eng-land	Scot-land	Wales	Direct Debit	Change /cash	PPM	Direct Debit	Change /cash	PPM
	(153) %	*(114)* %	*(39)* %	*(137)* %	*(7)* %	*(9)* %	*(71)* %	*(26)* %	*(27)* %	*(73)* %	*(27)* %	*(37)* %
Never heard of them	62	66	54	62	48	78	63	67	48	59	68	69
I'm just not interested in switching	21	15	37	23	-	14	24	20	29	20	24	21
I think they would be more expensive	7	9	4	6	29	13	9	4	7	7	4	2
I think they would have poor customer service	6	7	3	6	-	-	8	4	6	6	6	5
They might go bust	4	4	5	5	-	-	-	10	7	-	13	9
They are too small	4	3	5	4	-	-	-	3	7	3	7	5
Would only switch to a British/Scottish/ Welsh company	3	3	3	4	-	-	3	3	-	4	3	-
Worried I wouldn't get a good response to emergencies or technical problems like gas leaks or power cuts	2	3	-	2	-	-	1	-	5	3	-	3
Other	11	9	17	12	12	-	11	9	7	11	11	8
Don't know	7	8	6	7	23	-	8	4	13	10	-	8

Source: Ipsos MORI

The 153 customers who said they would not consider any of four examples of smaller brands (Atlantic, Ebico, Ecotricity and Good Energy) were asked why they rejected those particular companies. The principal objection is that customers have not heard of the brands. Apart from the 21% who are simply not interested in switching to anyone, substantive reasons are mentioned by only a few customers. Chief among these are concerns that small brands would be more expensive or may have poor customer service. Only a few mention worries about the smaller companies going bust, being simply too small, being of the wrong nationality or being concerned about response in an emergency.

Experience of switching makes no difference to views on these smaller companies.

Switching Behaviour

Penetration of Switching

Last 12 months

Q8 **Have you switched your gas supplier in the last 12 months, that is, since June 2007?**
Base: All domestic gas customers who are responsible/jointly responsible for bills (1707)

Q15 **Have you switched your electricity supplier in the last 12 months, that is, since June 2007?**
Base: All domestic electricity customers who are responsible/jointly responsible for bills (2008)

			Social Grade			Age			Region			Tenure	
		Total	**AB**	**C1C2**	**DE**	**16-34**	**35-64**	**65+**	**Eng-land**	**Scot-land**	**Wales**	**Rented**	**Non-rented**
		(1707) %	*(308)* %	*(781)* %	*(618)* %	*(426)* %	*(934)* %	*(347)* %	*(1452)* %	*(146)* %	*(108)* %	*(708)* %	*(987)* %
Switched gas supplier in last 12 months													
	Yes	24	25	24	23	29	25	17	24	22	22	28	23
	No	75	75	75	77	71	74	82	75	77	78	72	77
		(2008) %	*(376)* %	*(921)* %	*(711)* %	*(493)* %	*(1090)* %	*(425)* %	*(1713)* %	*(166)* %	*(128)* %	*(799)* %	*(1193)* %
Switched electricity supplier													
	Yes	23	24	23	21	27	25	15	24	20	20	25	22
	No	76	75	76	78	72	74	84	76	80	79	74	77

Source: Ipsos MORI

Q8	**Have you switched your gas supplier in the last 12 months, that is, since June 2007?** *Base: All domestic gas customers who are responsible/jointly responsible for bills (1707)*
Q15	**Have you switched your electricity supplier in the last 12 months, that is, since June 2007?** *Base: All domestic electricity customers who are responsible/jointly responsible for bills (2008)*

			Payment method					
			Gas			**Electricity**		
		Total	**Direct Debit**	**Cheque/ cash**	**PPM**	**Direct Debit**	**Cheque/ cash**	**PPM**
		(1707) %	*(919)* %	*(256)* %	*(380)* %	*(891)* %	*(232)* %	*(430)* %
Switched gas supplier in last 12 months								
	Yes	24	25	19	31	25	19	29
	No	75	74	80	68	75	80	69
		(2008) %	*(915)* %	*(253)* %	*(372)* %	*(1062)* %	*(301)* %	*(486)* %
Switched electricity supplier in last 12 months								
	Yes	23	27	16	30	26	14	27
	No	76	73	84	69	74	86	72

Source: Ipsos MORI

Just under a quarter of gas customers and a similar proportion of electricity customers have switched supplier in the last 12 months. There is no evidence of any significant difference in the penetration of recent switching by social class or by region. By age, it is clear the under 65s are more likely to switch than the 65+ group, but within the younger group no significant differences can be detected between 16-34s and 35-64s.

While social class does not seem to be associated with likelihood of switching in the past year, other indicators point to higher switching rates among the more vulnerable customer groups. Those in rented accommodation are more likely to have switched in the last year than the rest, though the difference is only significant in the case of gas. The data suggest that PPM customers are more likely to have switched than other payment types in the past year. This is particularly true of gas PPM customers, who are significantly more likely to have switched than either direct debit or quarterly cheque/cash customers. In the case of electricity, PPM customers are more likely to have switched in the past year than quarterly cheque/cash customers, but are on a par with direct debit customers. For both gas and electricity, it is the quarterly cheque/cash customers who are least likely to have switched in the past year.

Ever Switched

Q9 **Have you ever switched your gas supplier?**
Base: All domestic gas customers who are responsible/jointly responsible for bills (1707)

Q16 **Have you ever switched your electricity supplier?**
Base: All domestic electricity customers who are responsible/jointly responsible for bills (2008)

			Social Grade			Age			Region			Tenure	
		Total	**AB**	**C1C2**	**DE**	**16-34**	**35-64**	**65+**	**Eng-land**	**Scot-land**	**Wales**	**Rented**	**Non-rented**
		(1707) %	*(308)* %	*(781)* %	*(618)* %	*(426)* %	*(934)* %	*(347)* %	*(1452)* %	*(146)* %	*(108)* %	*(708)* %	*(987)* %
Ever switched gas supplier													
	Yes	60	67	60	54	53	64	57	61	59	52	49	65
	No	40	33	40	46	47	36	43	39	41	48	51	35
		(2008) %	*(376)* %	*(921)* %	*(711)* %	*(493)* %	*(1090)* %	*(425)* %	*(1713)* %	*(166)* %	*(128)* %	*(799)* %	*(1193)* %
Ever switched electricity supplier													
	Yes	55	61	55	48	48	61	48	57	47	38	44	60
	No	45	39	45	52	52	39	52	43	53	62	56	40

Source: Ipsos MORI

Q9 **Have you ever switched your gas supplier?**
Base: All domestic gas customers who are responsible/jointly responsible for bills (1707)

Q16 **Have you ever switched your electricity supplier?**
Base: All domestic electricity customers who are responsible/jointly responsible for bills (2008)

			Payment method					
			Gas			**Electricity**		
		Total	**Direct Debit**	**Cheque/ cash**	**PPM**	**Direct Debit**	**Cheque/ cash**	**PPM**
		(1707) %	*(919)* %	*(256)* %	*(380)* %	*(891)* %	*(232)* %	*(430)* %
Ever switched gas supplier								
	Yes	60	66	45	59	66	46	58
	No	40	34	55	41	34	54	42
		(2008) %	*(915)* %	*(253)* %	*(372)* %	*(1062)* %	*(301)* %	*(486)* %
Ever switched electricity supplier								
	Yes	55	64	39	57	62	35	55
	No	45	36	61	43	38	65	45

Source: Ipsos MORI

Our survey shows that a majority of domestic energy customers have now switched at least one fuel at some time to date – 62% have experienced switching, leaving 38% who have not. The proportion of gas customers who have ever switched gas supplier has now reached 60%; for electricity customers the proportion is 55%.

The proportion who have ever switched shows some significant variations by customer group, many of which support the view that switching energy supplier has, until recently, exhibited a typical new product/service pattern of early adoption by the higher social classes and the wealthier middle aged groups. Proportions having ever switched either gas or electricity are both highest among the AB social group, significantly lower among the C1/C2 group and lowest among the DEs. Furthermore, both gas and electricity switchers are significantly greater as a proportion of the 35-64 age group than of both older and younger customer groups. Following on from the social class differences, those in rented accommodation are significantly less likely to have switched each fuel than those in other accommodation.

Significant variations by payment method in the proportions ever switched each fuel probably relate mostly to the logic of the competitive market offers, which have tended to attract customers to direct debit because of the greater savings possible. Hence among those now paying for gas by direct debit, 66% have ever switched. Direct debit is the logical consequence of the switching process because it usually offers the lowest prices of all, though it may not be suitable for everyone. This is significantly higher than the proportion of PPM customers who have ever switched, which is itself higher than the proportion of quarterly cheque/cash payers. Among electricity customers, similar statistically significant differences exist, with quarterly paying customers ever further behind – just 35% have ever switched. High rates of recent switching among PPM customers have allowed them almost to catch up with direct debit customers.

Gas and electricity switching is affected differently by nation within Great Britain. There is no significant difference in gas switching by nation, but electricity switchers form a significantly greater proportion of customers in England than in either Scotland or Wales. Clearly there has been a "nationalistic" effect on electricity switching, one that has been bound up with the strong national identities of the Scottish and Welsh supply companies, but which has had less effect on the gas market, which was never so openly regionalised.

Frequency of Switching

Q10 How many times have you ever changed your gas supplier?
Base: All domestic gas customers who are responsible/jointly responsible for bills, who have ever switched gas supplier (1004)

		Social Grade			Age			Payment Method: Gas			Payment Method: Electricity		
	Total	AB	C1C2	DE	16-34	35-64	65+	Direct Debit	Change /cash	PPM	Direct Debit	Change /cash	PPM
	(1004)	(207)	(459)	(338)	(223)	(589)	(192)	(600)	(114)	(223)	(583)	(104)	(248)
	%	%	%	%	%	%	%	%	%	%	%	%	%
Once	52	50	51	58	57	47	63	49	62	58	50	60	56
Twice	21	20	23	19	20	23	18	22	21	15	22	24	17
Three times	16	19	15	13	12	17	14	17	9	14	17	8	16
Four times or more	9	9	8	8	7	11	4	9	5	11	9	6	9
Don't know	2	1	3	2	3	2	1	2	2	2	2	2	2
Mean	1.80	1.87	1.80	1.71	1.69	1.92	1.58	1.87	1.57	1.78	1.85	1.60	1.77

Source: Ipsos MORI

Q17 How many times have you ever changed your electricity supplier?
Base: All domestic electricity customers who are responsible/jointly responsible for bills, who have ever switched electricity supplier (1089)

		Social Grade			Age			Payment Method: Gas			Payment Method: Electricity		
	Total	AB	C1C2	DE	16-34	35-64	65+	Direct Debit	Change /cash	PPM	Direct Debit	Change /cash	PPM
	(1089)	(228)	(503)	(358)	(237)	(651)	(201)	(578)	(100)	(211)	(655)	(105)	(267)
	%	%	%	%	%	%	%	%	%	%	%	%	%
Once	52	47	52	56	56	47	61	49	65	55	49	61	56
Twice	22	22	24	20	22	24	19	23	20	17	23	23	18
Three times	16	19	14	14	12	16	16	18	11	13	17	10	12
Four times or more	9	11	8	8	8	11	4	9	5	12	9	5	11
Don't know	2	1	2	1	1	2	1	2	*	2	2	1	3
Mean	1.81	1.93	1.78	1.74	1.71	1.91	1.63	1.87	1.55	181	1.86	1.59	1.77

Source: Ipsos MORI

Despite the high proportion of switchers that now exist in both gas and electricity markets, it is important to note that over half of them have only a single experience of switching. Only a minority of each market is comprised of multiple switchers. The proportions of customers who have switched only once reflect most strongly the demographic groups among which switching to date is a lower incidence phenomenon: social class DE, the 65+ age group, those in rented accommodation and those who either pay quarterly by cheque/cash or by PPM.

Nature of most recent switch

Q20 **Can I just check, on the last occasion when you switched either gas or electricity supplier, did you switch…**

Base: All domestic gas customers who are responsible/jointly responsible for bills, who switched gas or electricity supplier in the last 12 months (538)

		Social Grade			Age			Payment Method					
								Gas			Electricity		
	Total	AB	C1C2	DE	16-34	35-64	65+	Direct Debit	Change /cash	PPM	Direct Debit	Change /cash	PPM
	%	%	%	%	%	%	%	%	%	%	%	%	%
Gas supplier only	7	6	6	10	7	5	13	5	16	11	4	15	12
Electricity supplier only	12	13	11	15	13	13	11	6	10	5	13	13	10
Both gas and electricity at once (now use one company)	71	70	74	67	72	73	64	79	65	80	74	59	75
Both gas and electricity at once (and now use two companies	5	6	5	4	3	6	3	6	3	4	6	2	3
Don't know	4	5	4	3	5	2	9	4	7	0	4	10	0

Source: Ipsos MORI

Most switchers in the past year switched both gas and electricity supplier and, of them, nearly all now use one company. Among those who switched one fuel only it is more likely to be electricity that they switched. Those in social classes DE and those in rented accommodation are least likely to switch both fuels and to now use one company. On the other hand, those with gas PPMs are more likely to have switched both fuels. Both quarterly paying and electricity PPM customers are more likely to have switched just their gas supplier.

Drivers of Switching in the last year

Experience of sales people

Q24 **(On that last occasion), would you say you switched as a direct result of a visit or telephone call from a supplier's salesperson or was it from making your own enquiries? Was that a visit, a telephone call or in a public place?**
Base: All domestic gas/electricity energy customers who are responsible/jointly responsible for bills, who switched gas/electricity in the last year (538)

								Payment Method					
		Social Grade			Age			Gas			Electricity		
	Total	AB	C1C2	DE	16-34	35-64	65+	Direct Debit	Change /cash	PPM	Direct Debit	Change /cash	PPM
	(538) %	(101) %	(243) %	(194) %	(159) %	(301) %	(78) %	(270) %	(54) %	(135) %	(293) %	(55) %	(154) %
Salesperson – visit to home (doorstep)	39	28	40	51	34	38	52	35	49	61	33	44	62
Own enquiries	35	40	36	29	38	37	26	38	27	26	40	28	25
Salesperson – telephone call	8	10	8	5	5	10	6	9	6	8	9	7	6
Salesperson – in shopping centre, public place etc	5	7	4	5	5	6	4	6	5	1	5	3	3
Both salesperson and own enquiries (volunteered)	1	1	*	1	2	*	-	*	1	1	*	1	1
Other	8	10	8	5	10	8	5	10	3	2	9	4	2
Any mention of salesperson (net)	53	46	52	63	47	53	62	49	61	72	48	56	73

Source: Ipsos MORI

Just over half of all those who switched in the last 12 months (53%) did so as a reaction to contact with a salesperson, mostly on the doorstep, but sometimes on the telephone or by street interception. These people are significantly more likely to be from social class DE, in rented accommodation and to have PPMs. They are also more likely to be 65+ than under 65.

By contrast, those who made their own enquiries are most likely to be from the professional and managerial AB social class, aged under 65 and in non-rented accommodation. They are also most likely to pay nowadays by direct debit.

Q25 **(On that occasion,) what made you decide to switch?**
Base: All domestic gas/electricity energy customers who are responsible/jointly responsible for bills, who switched gas/electricity as a result of contact with salesperson or both salesperson and own enquiries (307)

								Payment Method					
		Social Grade			Age			Gas			Electricity		
	Total	AB	C1C2	DE	16-34	35-64	65+	Direct Debit	Change /cash	PPM	Direct Debit	Change /cash	PPM
	(307) %	(46) %	(134) %	(127) %	(83) %	(175) %	(49) %	(136) %	(34) %	(98) %	(140) %	(31) %	(112) %
They told me I would save money/cheaper than current supplier	82	83	86	73	79	81	88	86	82	70	87	78	70
They offered an incentive (e.g. cashback, Nectar points etc)	10	14	6	11	14	8	9	10	3	11	10	3	12
Unhappy/poor service from previous supplier	4	-	5	6	4	5	2	3	3	7	3	8	6
They said there was no standing charge	3	-	4	5	6	2	2	1	3	11	1	3	10
To get rid of the salesperson	3	-	3	4	6	2	-	1	1	6	1	-	7
Liked the salesperson/felt sorry for them	2	5	-	4	-	1	9	3	3	-	3	3	-
Fixed rate offered/freeze prices	2	4	1	2	4	2	-	2	-	3	2	3	2
An eco friendly company	1	2	*	-	-	1	-	1	-	1	1	-	1
Would get one bill/all under one company/two bills in one	1	-	1	1	1	1	-	1	-	2	1	-	2
Better company/service	1	-	1	1	-	1	1	-	5	-	-	4	1
Just wanted to change	1	-	-	2	1	-	2	-	3	1	-	3	1
Other	3	8	2	1	-	5	2	3	-	2	3	-	1
Don't know/can't remember	3	5	3	1	5	3	-	2	-	5	3	-	6

Source: Ipsos MORI

Those switchers in the past year who reacted to approaches by salespersons mostly claim that it was the assertion that they would save money or that it would be cheaper than their current supplier that made them decide to switch. This includes a majority of PPM customers, though significantly fewer of them said they were told this. PPM customers are also more likely than most to mention the appeal of there being no standing charge.

The offer of an incentive is the next most frequently mentioned reason for the decision to switch, accounting for about one in ten. Other reasons include poor service from previous supplier, the offer of no standing charge and the offer of fixed rates, but few mention each of these. Three percent admit they made the decision simply "to get rid of the salesperson".

Q26 **And can you remember, did the salesperson say they were cheaper than your current supplier or did they tell you they were the cheapest on the market?**

Base: All domestic gas/electricity energy customers who are responsible/jointly responsible for bills, who switched gas/electricity as a result of contact with salesperson or both salesperson and own enquiries (307)

								Payment Method					
		Social Grade			Age			Gas			Electricity		
	Total	**AB**	**C1C2**	**DE**	**16-34**	**35-64**	**65+**	**Direct Debit**	**Change /cash**	**PPM**	**Direct Debit**	**Change /cash**	**PPM**
	(307) %	*(46)* %	*(134)* %	*(127)* %	*(83)* %	*(175)* %	*(49)* %	*(136)* %	*(34)* %	*(98)* %	*(140)* %	*(31)* %	*(112)* %
Cheaper than current	68	73	70	59	57	68	76	69	56	65	71	53	64
Cheapest on market	18	12	15	27	24	17	12	15	31	23	14	29	26
Didn't say they were cheaper at all	3	5	1	5	2	3	2	4	-	2	4	3	2
Don't know/can't remember	12	11	14	9	16	11	10	12	13	11	11	16	9

Source: Ipsos MORI

Seven in ten of those who switched in the last year after contact with a salesperson say they were told the new supplier was cheaper than their current supplier. It is clear, however, that in certain sub-groups significantly fewer got this message, including social class DE, 16-34s and those in rented accommodation. In fact for 18% the message they remember from the salesperson is that their company was "cheapest on the market". This proportion was highest of all for social class DE (27%), especially the state-supported group E (29%), and for those in rented accommodation (23%). Those on PPMs are also more likely than all customers to have understood this, particularly those on electricity PPMs, though the figure for those on quarterly cheque/cash payment is higher still.

Other incentives received

Q27 **What kind of incentive, if any, did you receive at the time of switching, just for signing up? For example cashback or Nectar points?**

Base: All domestic gas/electricity energy customers who are responsible/jointly responsible for bills, who switched gas/electricity in the last 12 months (538)

		Social Grade			Age			Payment Method: Gas			Payment Method: Electricity		
	Total	AB	C1C2	DE	16-34	35-64	65+	Direct Debit	Change /cash	PPM	Direct Debit	Change /cash	PPM
	(538)	*(101)*	*(243)*	*(194)*	*(159)*	*(301)*	*(78)*	*(270)*	*(54)*	*(135)*	*(293)*	*(55)*	*(154)*
	%	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*
Cashback	11	18	9	8	9	13	8	13	8	7	13	7	7
Nectar Points	8	9	8	6	8	8	5	8	8	8	8	6	10
Reduction in bill/discount/cheaper/better offer	3	3	3	3	3	2	5	3	5	2	3	4	2
Other gifts	3	4	3	2	1	3	4	3	5	1	3	4	3
Other Points schemes e.g. Tesco/Argos/clubcard	3	4	2	2	4	3	-	3	1	3	3	3	3
Capped the price/fixed rate	2	2	2	1	*	2	3	2	-	1	2	-	1
Vouchers	1	2	1	2	2	1	-	2	-	1	1	-	1
Dual Fuel discount	1	1	1	-	3	-	-	1	-	-	1	2	-
Gift of wine	*	1	-	-	-	*	-	*	-	-	*	-	-
Other	1	1	1	1	-	1	3	1	-	2	1	1	2
None	63	52	67	70	66	62	63	62	64	73	61	60	71
Don't know	6	6	6	4	6	4	8	4	9	3	5	12	3

Source: Ipsos MORI

Few spontaneously mention receiving incentives as a reason for their final decision to switch. However, when prompted by being asked about them directly it emerges that approximately 31% consider they received some kind of incentive for signing up, though some of the items mentioned may not qualify as "incentives" to some people: for example, a capped or fixed rate, a reduction in bills and a dual fuel discount. Most common is some form of cashback (11%) – this is most prevalent in Scotland (27%) and among social class ABs (18%). It is significantly less common, however, among electricity PPM customers.

Nectar points are the second most frequently mentioned incentive received, though only by 8%. Only very small proportions received other kinds of gifts such as points schemes and vouchers.

Satisfaction with Switching

Q28 **Still thinking about that last occasion when you made a switch, how satisfied were you with:**
Base: All domestic gas/electricity energy customers who are responsible/jointly responsible for bills, who switched gas/electricity in the last 12 months (538)

		Social Grade			Age			Payment Method: Gas			Payment Method: Electricity		
	Total	**AB**	**C1C2**	**DE**	**16-34**	**35-64**	**65+**	**Direct Debit**	**Change /cash**	**PPM**	**Direct Debit**	**Change /cash**	**PPM**
	(538) %	*(101)* %	*(243)* %	*(194)* %	*(159)* %	*(301)* %	*(78)* %	*(270)* %	*(54)* %	*(135)* %	*(293)* %	*(55)* %	*(154)* %
A the amount you believe you actually saved by switching													
Satisfied	61	64	59	62	63	63	51	64	49	61	63	46	62
Dissatisfied	11	8	12	14	14	9	13	9	14	23	9	11	22
B the accuracy of any information you were given													
Satisfied	70	72	69	69	68	72	66	73	61	67	72	60	68
Dissatisfied	10	7	11	12	14	8	11	9	7	20	9	5	20
C how smoothly the switch took place													
Satisfied	77	79	75	80	75	80	72	78	74	84	78	66	83
Dissatisfied	10	13	9	8	11	9	9	11	4	9	10	6	9
D the choice of supplier that you made													
Satisfied	75	75	75	75	75	75	78	78	69	72	77	71	70
Dissatisfied	7	2	9	11	12	6	6	5	12	13	6	9	14

Source: Ipsos MORI

Customers who switched in the last 12 months are mostly satisfied with the experience. In particular, more than three-quarters are satisfied with how smoothly the switch took place and the choice they made of supplier. Slightly fewer are satisfied with the accuracy of information they were given. The lowest level of satisfaction is with the amount they believe they actually saved by switching. However they are not notably more dissatisfied with this; it is more an issue of their simply not knowing. A greater proportion is unable to give an answer either way on this aspect of satisfaction – 16% are neither satisfied nor dissatisfied and 9% don't know.

On the savings believed to have been made, some vulnerable groups are significantly more likely to be among the dissatisfied, including social class E, those in rented accommodation and PPM customers. The same applies to those in Scotland (22% dissatisfied), though the sample size in Scotland is very small.

There is some evidence of dissatisfaction with the accuracy of information received among vulnerable groups: social class E, those in rented accommodation and PPM customers are most likely to be dissatisfied. The same applies to dissatisfaction with the choice of supplier made – social class E, the 16-34 age group and PPM customers are most dissatisfied, though in the last case here, PPM customers are in fact only marginally more dissatisfied than quarterly cheque/cash customers.

By contrast, PPM customers are significantly more satisfied than other customers with how smoothly the switch took place – 84% of gas PPM switchers and 83% of electricity PPM switchers are satisfied.

Information Search

Q29 Did you find out about the deals offered by other suppliers apart from the one you switched to?
Base: All domestic gas/electricity energy customers who are responsible/jointly responsible for bills, who switched gas/electricity in the last 12 months (538)

								Payment Method					
		Social Grade			Age			Gas			Electricity		
	Total	**AB**	**C1C2**	**DE**	**16-34**	**35-64**	**65+**	**Direct Debit**	**Change /cash**	**PPM**	**Direct Debit**	**Change /cash**	**PPM**
	(538) %	*(101)* %	*(243)* %	*(194)* %	*(159)* %	*(301)* %	*(78)* %	*(270)* %	*(54)* %	*(135)* %	*(293)* %	*(55)* %	*(154)* %
Yes	30	44	29	15	30	33	20	35	14	19	37	12	19
No	62	45	64	78	64	60	67	59	73	76	55	72	78
Don't know/can't remember	8	11	7	7	6	7	13	6	13	4	8	16	3

Source: Ipsos MORI

It is apparent that most switchers in the past year completed their transaction without a complete picture of the competing offers in the market. Just 30% did consider other deals. These people are strongly differentiated by social class: ABs are much more likely to have considered other deals than C1/C2s, who are themselves more likely than DEs. Similarly the under 65s and those not in rented accommodation are also more likely to have considered other deals.

Those who did not consider other deals include significantly more social class DEs, customers in rented accommodation and PPM customers.

Among those (307 people) whose switch involved a salesperson, the proportion who did find out about other deals is halved to 15%. On the other hand, among those with no salesperson involvement, 50% found out about other competing deals as well.

Q30 Where did you get your information from?

Base: All domestic gas/electricity energy customers who are responsible/jointly responsible for bills, who switched gas/electricity in the last 12 months and found out about other suppliers' deals when switching (142)

								Payment Method					
		Social Grade			Age			Gas			Electricity		
	Total	AB	C1C2	DE	16-34	35-64	65+	Direct Debit	Change /cash	PPM	Direct Debit	Change /cash	PPM
	(142) %	(44) %	(67) %	(31) %	(43) %	(85) %	(14) %	(89) %	(8) %	(25) %	(104) %	(7) %	(28) %
A price comparison website	60	63	65	32	59	66	33	66	43	16	65	44	21
Suppliers' own websites	24	23	25	22	29	21	25	26	-	22	25	-	26
Friends or family	10	2	11	33	11	8	22	6	20	29	7	22	29
Phoning individual companies	10	12	5	18	11	9	9	10	10	17	9	11	18
Martin Lewis	8	16	1	5	6	10	-	9	-	-	9	-	-
Other suppliers' salespeople	8	2	12	8	11	5	15	7	31	11	7	34	6
Newspapers, magazines or TV adverts	4	2	4	11	1	6	3	3	-	12	3	-	14
Energywatch	3	4	1	7	3	4	-	3	-	3	3	-	3
Other	7	10	6	2	5	7	11	5	6	10	7	-	17
Don't know/Can't remember	2	4	-	6	-	4	-	1	-	9	2	-	5

Source: Ipsos MORI

Those who did find out about other suppliers' deals mainly did so by means of price comparison websites, and a further 8% specifically used the Martin Lewis website. However a quarter used suppliers' own websites as a source of information, and a further 10% telephoned other suppliers. Just 3% used energywatch as a source. There are suggestions from these findings that social class E, the 65+, those in rented accommodation and PPM customers are least likely to use price comparison websites, despite their use being widely spread across social classes A-D. Furthermore there are indications that PPM customers rely disproportionately on the advice of friends and family and quarterly payers rely on the salespeople of other suppliers. Sample sizes are too small to be conclusive about sub-group differences on this question, though usage of the internet is explored in more detail overleaf.

Role of the Internet

Access to internet

Q31 **Do you have access to the internet at home, at work or elsewhere?**
Base: All domestic gas/electricity customers who are responsible/jointly responsible for bills (2024)

		Social Grade			Age			Payment Method: Gas			Payment Method: Electricity		
	Total	AB	C1C2	DE	16-34	35-64	65+	Direct Debit	Change /cash	PPM	Direct Debit	Change /cash	PPM
	(2024)	*(377)*	*(931)*	*(716)*	*(497)*	*(1097)*	*(430)*	*(919)*	*(256)*	*(380)*	*(1062)*	*(301)*	*(486)*
	%	%	%	%	%	%	%	%	%	%	%	%	%
Yes	68	85	73	41	81	79	33	76	55	60	76	54	57
No	31	14	27	58	18	21	65	24	44	40	23	45	43

Source: Ipsos MORI

Q31 **Do you have access to the internet at home, at work or elsewhere?**
Base: All domestic gas/electricity customers who are responsible/jointly responsible for bills (2024)

		Region			Tenure	
	Total	England	Scotland	Wales	Rented	Non rented
	(2024)	*(1724)*	*(167)*	*(132)*	*(806)*	*(1202)*
	%	%	%	%	%	%
Yes	68	69	63	59	57	72
No	31	31	36	33	42	27

Source: Ipsos MORI

The internet has become the most important tool in enabling customers to compare deals between energy suppliers, where they choose to do so. Just under seven in ten have access to the internet, at home or at work or elsewhere,[3] but this by no means regularly distributed throughout the population. Internet access relates very strongly to social class, with social class A showing a penetration of 91%, falling progressively to 56% among group D and just 27% of group E. A similar pattern is apparent by age; around eight in ten of those aged up to 64 have internet access but this falls to 33% among the 65+. Household tenure is not quite as strong a discriminator: 57% of those in rented accommodation have internet access, compared to 72% of others. Payment method is a strong discriminator in the case of direct debit customers; both gas and electricity direct debit payers are significantly more likely to have internet access, but PPM customers do not have a greatly lower penetration than the population as a whole, but quarterly cheque/cash payers have the lowest penetration of all.

Switchers show significantly greater internet access than non-switchers, both gas and electricity. Among those who have ever switched either fuel internet access is available to 74%, compared to just 58% of non-switchers, among those who have switched either fuel in the last year it is 78%.

By region, internet access in England is highest, while Wales shows the lowest figure.

[3] This compares closely with June 2008 Ipsos MORI figures from the *Tech Tracker* which gives an internet penetration of 71% of GB individuals aged 15+

Use of Internet

Q32	Have you used the internet to find out about… *Base: All domestic gas/electricity customers who are responsible/jointly responsible for bills who have access to the internet (1296)*												
								Payment Method					
		Social Grade			Age			Gas			Electricity		
	Total	AB	C1C2	DE	16-34	35-64	65+	Direct Debit	Change /cash	PPM	Direct Debit	Change /cash	PPM
	(1296) %	*(321)* %	*(674)* %	*(301)* %	*(371)* %	*(797)* %	*(128)* %	*(675)* %	*(136)* %	*(219)* %	*(797)* %	*(157)* %	*(265)* %
Comparative prices or savings for gas or electricity													
Yes	38	43	38	28	35	40	31	43	26	18	43	28	18
No	62	57	62	71	65	59	68	57	74	81	56	72	82
the suppliers themselves													
Yes	25	29	26	15	25	27	18	29	15	15	29	16	14
No	74	71	74	84	75	72	82	70	85	85	70	84	86
the process of switching													
Yes	22	27	21	16	18	25	18	25	12	10	26	14	12
No	77	72	78	83	81	74	82	74	88	89	73	86	88
comparative prices or savings on other services like insurance or telephone etc													
Yes	46	52	46	34	44	50	29	50	40	27	50	38	32
No	54	48	54	65	55	50	70	49	60	72	49	62	67

Source: Ipsos MORI

Levels of internet access are, however, only part of the story. Only minorities of energy customers with internet access use the internet for comparing gas or electricity prices, to find out about the suppliers themselves or to find out about the process of switching. Usage for price comparison now stands at 38%, but is higher than this among ABC1 social groups, the 35-64 age group and customers who use direct debit. By contrast, usage of the internet for price comparison is lowest among quarterly cheque/cash payers and PPM customers, social class DE and those in rented accommodation. There is no difference by region of Great Britain.

Fewer use the internet to find out about the suppliers themselves (just 25%), which may put smaller, lesser known suppliers at a disadvantage. Indeed among those who currently use suppliers other than the Big Six, usage of the internet to find out about suppliers is significantly higher. Again, this is more commonly a practise of younger, ABC1C2 customers who probably do not rent their homes and who most often pay by direct debit.

The lowest level of usage of the internet is in the instance of finding out about the process of switching; just 22% do so, rising to 27% of social class AB. Again, usage is higher among upmarket customers.

Outside the energy market, in services such as insurance or telecommunications, the internet is used more widely to obtain price comparisons – almost half, 46%, use it for this purpose. While this is a much broader base, it is still dominated by the higher social classes and younger customers – PPM and quarterly customers are again least likely to use it.

Switching on the Internet

Q33	**Did you actually use the internet to make your most recent switch?** *Base: All domestic gas/electricity energy customers who are responsible/jointly responsible for bills, who switched gas/electricity in the last 12 months and have access to the internet (393)*												
								Payment Method					
		Social Grade			**Age**			**Gas**			**Electricity**		
	Total	**AB**	**C1C2**	**DE**	**16-34**	**35-64**	**65+**	**Direct Debit**	**Change /cash**	**PPM**	**Direct Debit**	**Change /cash**	**PPM**
	(393) %	*(96)* %	*(199)* %	*(98)* %	*(123)* %	*(238)* %	*(32)* %	*(223)* %	*(33)* %	*(84)* %	*(250)* %	*(33)* %	*(92)* %
Yes	25	35	22	14	21	27	27	29	7	11	29	10	13
No	71	61	75	83	78	69	69	68	83	87	68	78	85
Don't know	3	4	3	3	1	4	4	2	10	2	3	12	2

Source: Ipsos MORI

Q33	**Did you actually use the internet to make your most recent switch?** *Base: All domestic gas/electricity energy customers who are responsible/jointly responsible for bills, who switched gas/electricity in the last 12 months and have access to the internet (393)*					
		Region			**Tenure**	
	Total	**England**	**Scotland**	**Wales**	**Rented**	**Non rented**
	(393) %	*(346)* %	*(26)* %	*(20)* %	*(151)* %	*(241)* %
Yes	25	25	19	32	13	30
No	71	71	81	68	84	66
Don't know	3	4	-	-	3	4

Source: Ipsos MORI

Among those who have switched in the last year who have internet access, just one in four used the internet to make the switch. Those doing so are more likely to be from social class AB, to be non-renters and to pay by direct debit. There is very little difference by age, and no significant difference by region (Wales and Scotland samples are very small for this sub-group).

Likelihood of (further) Switching

Q34	How likely would you be to switch either electricity or gas supplier (again) in the next 12 months? *Base: All domestic gas/electricity customers who are responsible/jointly responsible for bills (2024)*												
								Payment Method					
		Social Grade			Age			Gas			Electricity		
	Total	AB	C1C2	DE	16-34	35-64	65+	Direct Debit	Change /cash	PPM	Direct Debit	Change /cash	PPM
	(2024)	*(377)*	*(931)*	*(716)*	*(497)*	*(1097)*	*(430)*	*(919)*	*(256)*	*(380)*	*(1062)*	*(301)*	*(486)*
	%	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*
Definitely	3	3	4	3	6	4	1	3	2	6	3	2	6
Very likely	7	11	7	4	9	9	2	10	3	6	9	4	6
Fairly likely	12	16	14	5	13	14	8	14	11	7	14	10	9
Not very likely	19	22	19	15	20	20	17	20	19	17	20	17	20
Not at all likely	16	17	16	16	15	16	17	16	12	23	17	14	19
Definitely not	33	22	32	47	23	30	49	27	45	35	28	46	35
Don't know	9	9	9	9	14	8	6	9	8	7	9	8	6

Source: Ipsos MORI

Q34	How likely would you be to switch either electricity or gas supplier (again) in the next 12 months? *Base: All domestic gas/electricity customers who are responsible/jointly responsible for bills (2024)*						
		Switched gas in last year		Switched electricity in last year		Switched either gas or electricity in the last year	
	Total	Yes	No	Yes	No	Yes	No
	(2024)	*(428)*	*(1596)*	*(477)*	*(1547)*	*(538)*	*(1486)*
	%	*%*	*%*	*%*	*%*	*%*	*%*
Definitely	3	6	3	6	3	5	3
Very likely	7	13	6	13	5	12	5
Fairly likely	12	16	11	17	11	17	11
Not very likely	19	22	18	23	18	22	18
Not at all likely	16	14	17	14	17	14	17
Definitely not	33	22	36	21	37	22	37
Don't know	9	8	9	7	10	8	10

Source: Ipsos MORI

Q35 And how likely would be to switch (again) at some time in the future?
Base: All domestic gas/electricity customers who are responsible/jointly responsible for bills (2024)

		Social Grade			Age			Payment Method: Gas			Payment Method: Electricity		
	Total	AB	C1C2	DE	16-34	35-64	65+	Direct Debit	Change /cash	PPM	Direct Debit	Change /cash	PPM
	(2024)	(377)	(931)	(716)	(497)	(1097)	(430)	(919)	(256)	(380)	(1062)	(301)	(486)
	%	%	%	%	%	%	%	%	%	%	%	%	%
Definitely	4	4	5	4	7	4	1	5	2	6	5	2	6
Very likely	11	16	11	7	14	13	3	14	6	7	13	8	8
Fairly likely	18	26	19	8	19	21	12	21	14	14	21	12	17
Not very likely	15	13	15	16	15	15	15	14	15	18	14	16	18
Not at all likely	12	11	12	14	10	12	15	12	11	16	12	12	14
Definitely not	25	17	23	39	16	22	41	20	36	29	21	35	28
Don't know	14	13	15	13	19	13	12	13	15	10	14	15	10

Source: Ipsos MORI

Q35 And how likely would be to switch (again) at some time in the future?
Base: All domestic gas/electricity customers who are responsible/jointly responsible for bills (2024)

		Switched gas in last year		Switched electricity in last year		Switched either gas or electricity in the last year	
	Total	Yes	No	Yes	No	Yes	No
	(2024)	(428)	(1596)	(477)	(1547)	(538)	(1486)
	%	%	%	%	%	%	%
Definitely	4	7	4	7	4	6	4
Very likely	11	21	9	21	8	20	8
Fairly likely	18	25	17	27	16	27	15
Not very likely	15	15	15	14	15	14	15
Not at all likely	12	7	13	6	14	7	14
Definitely not	25	13	28	12	29	13	29
Don't know	14	13	15	13	15	13	15

Source: Ipsos MORI

There is no widespread enthusiasm among customers as a whole for the concept of switching energy supplier in future. Just one in three (33%) describe themselves as at least fairly likely to switch (again) at some time in the future. This falls to 23% at least fairly likely to switch in the next 12 months. This last figure tallies fairly closely with the proportion who actually did switch either fuel in the last 12 months (26%).

In line with past switching, those at least fairly likely to switch in the next 12 months are most likely to be from social class AB and least likely to be from social class DE. They are also most likely to be under 65, from England or Wales rather than Scotland, to be non-renters and to pay by direct debit. PPM customers and quarterly cheque/cash payers are, by contrast, significantly more likely than others to rate themselves as **not** likely to switch in the next year (not very/not at all or definitely not). We can speculate that the higher social class groups are perhaps more likely to plan future switching, whereas switching by PPM users, for example, is more reactive to sales calls.

The slightly larger proportion that is at least fairly likely to switch "at some time in the future" shows a similar pattern by sub-groups, though all figures are somewhat higher, even for the least likely groups to switch.

Those who have switched in the past are more likely to switch again in the future. Among those who have never switched, 77% are not likely to switch in the next 12 months with just 11% at least fairly likely to do so. This rises to 14% when they are asked about "some time in the future". That leaves 69% of non-switchers who say they are unlikely ever to switch – this constitutes just over a quarter (26%) of all domestic customers.

Minimum savings needed to switch

Q37a **Preferred frequency for expressing minimum saving on gas you would need to be offered in order to make you willing to switch gas supplier in the near future?**
Base: All domestic gas/electricity customers who are responsible/jointly responsible for bills who pay for their fuel in two separate payments or have gas only (1707)

							Payment Method					
		Social grade			Age		Gas			Electricity		
	Total	AB	C1C2	DE	Under 65	65+	Direct Debit	Change /cash	PPM	Direct Debit	Change /cash	PPM
	(1707) %	*(308)* %	*(781)* %	*(618)* %	*(1360)* %	*(347)* %	*(919)* %	*(256)* %	*(380)* %	*(891)* %	*(232)* %	*(430)* %
Weekly	4	2	4	9	5	2	1	3	24	1	2	22
Monthly	14	16	15	11	16	10	17	6	13	17	6	13
Quarterly	6	7	5	4	6	5	4	18	1	3	17	4
Annually (if volunteered)	4	6	5	1	4	4	5	5	3	4	5	3
Don't know	72	69	71	75	69	80	74	68	59	74	69	58

Source: Ipsos MORI

Q37b **What is the minimum saving on gas you would need to be offered in order to make you willing to switch gas supplier in the near future?**
Base: All domestic gas/electricity customers who are responsible/jointly responsible for bills who pay for their fuel in two separate payments or have gas only (1707) Median figures

							Payment Method					
		Social grade			Age		Gas			Electricity		
	Total	AB	C1C2	DE	Under 65	65+	Direct Debit	Change /cash	PPM	Direct Debit	Change /cash	PPM
	£	£	£	£	£	£	£	£	£	£	£	£
Weekly	5	4	5	5	5	6	4	5	5	4	5	5
Monthly	10	10	10	10	10	10	10	12	9	10	12	10
Quarterly	33	27	41	27	38	22	32	36	15	34	36	20
Annually (if volunteered)	90	89	86	97	91	73	88	116	86	88	115	81
Annual Median (calculated)	139	116	145	200	150	114	117	178	241	118	150	237
Annual **Mean** (calculated)	303	205	227	594	310	269	233	262	261	232	261	273

Source: Ipsos MORI

Q38a **Preferred frequency for expressing the minimum saving on electricity you would need to be offered in order to make you willing to switch electricity supplier in the near future?**

Base: All domestic gas/electricity customers who are responsible/jointly responsible for bills who pay for their fuel in two separate payments or have electricity only (2008)

							Payment Method					
		Social grade			Age		Gas			Electricity		
	Total	AB	C1C2	DE	Under 65	65+	Direct Debit	Change /cash	PPM	Direct Debit	Change /cash	PPM
	(2008)	*(376)*	*(921)*	*(711)*	*(1583)*	*(425)*	*(915)*	*(253)*	*(372)*	*(1062)*	*(301)*	*(486)*
	%	%	%	%	%	%	%	%	%	%	%	%
Weekly	5	2	4	9	6	3	1	3	23	2	2	26
Monthly	15	18	16	11	17	11	16	4	12	18	6	12
Quarterly	6	9	6	5	6	6	3	16	1	4	21	2
Annually (if volunteered)	4	6	4	2	4	3	4	5	2	4	5	3
Don't know	70	65	70	74	67	76	75	72	62	72	66	59

Source: Ipsos MORI

Q38b **What is the minimum saving on electricity you would need to be offered in order to make you willing to switch electricity supplier in the near future?**

Base: All domestic gas/electricity customers who are responsible/jointly responsible for bills who pay for their fuel in two separate payments or have electricity only (2008) Median figures

							Payment Method					
		Social grade			Age		Gas			Electricity		
	Total	AB	C1C2	DE	Under 65	65+	Direct Debit	Change /cash	PPM	Direct Debit	Change /cash	PPM
	£	£	£	£	£	£	£	£	£	£	£	£
Weekly	5	4	5	5	5	10	5	4	5	6	5	5
Monthly	10	10	10	10	10	10	10	16	11	10	12	11
Quarterly	29	27	41	28	34	20	28	27	24	30	28	18
Annually (if volunteered)	91	90	91	93	94	83	86	90	124	89	95	77
Annual Median (calculated	137	115	164	191	160	111	115	150	242	117	144	245
Annual **Mean** (calculated)	341	301	407	251	239	763	215	243	291	354	363	306

Source: Ipsos MORI

Q39a **Preferred frequency for expressing the <u>minimum</u> total amount of saving you would need to be offered in order to make you willing to switch <u>gas and electricity</u> supplier in the near future?**
Base: All domestic gas/electricity customers who are responsible/jointly responsible for bills who are dual fuel customers or don't know their payment method (696)

							Payment Method					
		Social grade			**Age**		**Gas**			**Electricity**		
	Total	**AB**	**C1C2**	**DE**	**Under 65**	**65+**	**Direct Debit**	**Change /cash**	**PPM**	**Direct Debit**	**Change /cash**	**PPM**
	(696) %	*(162)* %	*(349)* %	*(185)* %	*(547)* %	*(149)* %	*(457)* %	*(73)* %	*(65)* %	*(495)* %	*(77)* %	*(65)* %
Weekly	4	2	3	8	4	3	2	-	32	2	-	30
Monthly	34	42	35	21	35	33	40	13	20	40	10	22
Quarterly	11	10	11	15	12	9	9	27	1	10	27	1
Annually (if volunteered)	11	16	10	5	11	10	12	5	1	13	7	1
Don't know	40	31	42	51	38	46	36	54	35	35	57	45

Source: Ipsos MORI

Q39b **What is the <u>minimum</u> total amount of saving you would need to be offered in order to make you willing to switch <u>gas and electricity</u> supplier in the near future?**
Base: All domestic gas/electricity customers who are responsible/jointly responsible for bills who are dual fuel customers or don't know their payment method (696) Median figures

							Payment Method					
		Social grade			**Age**		**Gas**			**Electricity**		
	Total	**AB**	**C1C2**	**DE**	**Under 65**	**65+**	**Direct Debit**	**Change /cash**	**PPM**	**Direct Debit**	**Change /cash**	**PPM**
	£	£	£	£	£	£	£	£	£	£	£	£
Weekly	10	11	9	11	10	5	10	-	10	13	-	10
Monthly	18	15	18	17	16	13	18	20	17	18	20	11
Quarterly	42	40	31	47	43	24	40	37	15	41	42	15
Annually (if volunteered)	88	81	81	97	85	99	84	230	100	86	246	100
Annual Median (calculated	178	148	176	225	183	162	172	207	485	171	215	484
Annual **Mean** (calculated)	390	310	251	1026	428	255	348	278	538	274	312	521

Source: Ipsos MORI

Detailed questioning about the savings customers would need to be offered to make them willing to switch in the future reveals a number of areas of poor knowledge and consequently some unrealistic expectations.

Whether answering about gas only, electricity only or dual fuel, customers are more likely to think of savings in terms of monthly amounts than any other frequency. However this is not a clear preference, and a sizeable proportion thinks in terms of other frequencies such as weekly or quarterly, even annually. This points to it being a difficult communications task to express savings in a form that is meaningful to the majority of customers. In fact the most striking finding here is the large proportion of don't knows – customers who are completely unable to come up with an acceptable savings figure for any frequency (72% for gas only; 70% for electricity only; 40% for dual fuel). It may be that these high figures are related to the relatively low likelihood of future switching – it is simply not something that has been contemplated. Even among those who have switched before, the proportion who don't know regarding expected dual fuel savings is still 36%.

Unrealistic estimates by a minority of respondents give rise to exaggerations in the mean desired savings figures. Close analysis of the data led us to reject the use of means. For example, almost two-thirds of those who gave a weekly saving for gas alone mentioned a figure of up to £5, yet the mean was dragged up to £13 by 24 higher responses. The median figure of £5 a week is a better representation of "typical" opinion in this case, and is more realistic. A similar pattern can be seen throughout the data, so we have reported based on median figures.

The median figures calculated for the minimum annual savings expected are as follows: £139 for gas alone, £137 for electricity alone and £178 for dual fuel. While these figures are certainly in a realistic ballpark for what is possible in general terms, they have to be assessed in relation to the respondent's switching history, since an initial switch from an incumbent (regional) company usually yields greater savings. It is clear that experience of switching gives rise to lower estimates of necessary savings. Among those who have switched in each case the corresponding annual medians are £119 for gas alone, £117 for electricity alone and £162 for dual fuel. In each case, it is primarily the non-switchers who are making (sometimes wildly) optimistic estimates of possible savings.

The same distinction holds for those likely to switch in the future – like previous switchers, they give lower estimates for the necessary savings expected. Those with less intention to switch in the future give much higher estimates of expected savings.

Median annual expected savings by experience of switching and intention to switch – summary table

Q37b/Q38b/Q39b		Ever Previously Switched that fuel		Likelihood of future switching	
	Overall	**Yes**	**No**	**Likely**	**Unlikely**
	£	£	£	£	£
Gas only	139	119	161	114	197
Electricity only	137	117	178	111	198
Dual fuel	178	162	226	119	219

Source: Ipsos MORI

Attitudes to Switching Domestic Energy Supplier

A number of agree/disagree attributes are able to show clear discrimination among groups of customers in their attitudes towards elements of switching. These discriminations are, of course, multi-dimensional, so when combined they can be used to define segments of the customer universe – see overleaf.

The attributes themselves can be considered individually or by theme.

Knowledge and Confidence

Q40 **Can you tell me to what extent you agree or disagree with these statements on switching domestic energy suppliers?**
Base: All domestic gas/electricity customers who are responsible/jointly responsible for bills (2024)

							Payment Method					
		Social grade			Age		Gas			Electricity		
	Total	AB	C1C2	DE	Under 65	65+	Direct Debit	Change /cash	PPM	Direct Debit	Change /cash	PPM
	(2024) %	(377) %	(931) %	(716) %	(1594) %	(430) %	(919) %	(256) %	(380) %	(1062) %	(301) %	(486) %
I feel reasonably confident that I know enough about how to switch suppliers												
Agree	70	74	70	65	72	63	73	61	71	73	61	69
Disagree	19	15	19	24	18	24	16	25	21	17	23	23
The number of different tariffs is too confusing												
Agree	70	72	68	74	70	73	72	75	69	70	69	71
Disagree	14	15	16	9	15	12	15	10	12	15	13	12
I have no time to think about switching												
Agree	35	33	36	38	38	29	33	39	42	33	37	39
Disagree	44	48	44	39	41	52	49	39	35	47	40	39
It's too hard to work out whether I would save or not if I switched												
Agree	52	43	51	65	49	61	50	63	58	48	61	57
Disagree	29	38	30	17	32	19	33	19	21	34	20	24

Source: Ipsos MORI

Most customers feel confident enough in general terms to be able to switch suppliers (70%) though a sizeable minority – one in five - disagree. However some aspects of the competitive market still confuse many people. Seven in ten, for example, agree that the number of different tariffs is too confusing and an overall majority, 52%, agree that it's too hard to work out whether they would save or not if they switched.

Confidence with the market is linked to higher social class and to age, with the greatest confidence among the ABs and the under 65s (particularly 35-64 year olds). Those who pay by direct debit are also more confident, but PPM customers are not significantly different: the lowest confidence is found among the quarterly cheque/cash payers. Confusion with the different tariffs is a little higher among social class DEs, but generally is widely distributed across customer types. Those who find it hard to work out whether they would save money are more likely to be social class DE, over 65, in rented accommodation, and to pay by quarterly cheque/cash or PPM.

Customers are fairly equally divided into those who agree they have no time to think about switching and those who disagree with this. There could be two aspects to this, corresponding with two groupings in the customer base: those who have no time because domestic energy is not significant enough to them as a proportion of their income, and those who are too preoccupied with the struggle for survival to give thought to something so complex. There is little difference by social class in these proportions; with ABs as likely as any to agree, giving evidence for the existence of the first of these groupings. By age, the 65+ are most likely to disagree, as would be expected for retired people. However, it is the PPM customers who are significantly more likely to agree that they have no time. Given that people on weekly/fortnightly payment schemes (often the lowest income people of all) are also most likely to agree (though there are too few to be conclusive) this points to the parallel existence of the second group.

Belief about Suppliers

Q40 **Can you tell me to what extent you agree or disagree with these statements on switching domestic energy suppliers?**

Base: All domestic gas/electricity customers who are responsible/jointly responsible for bills (2024)

							Payment Method					
		Social grade			Age		Gas			Electricity		
	Total	AB	C1C2	DE	Under 65	65+	Direct Debit	Change /cash	PPM	Direct Debit	Change /cash	PPM
	(2024) %	*(377)* %	*(931)* %	*(716)* %	*(1594)* %	*(430)* %	*(919)* %	*(256)* %	*(380)* %	*(1062)* %	*(301)* %	*(486)* %
Some energy suppliers are more trustworthy and reliable than others												
Agree	60	59	63	54	62	52	60	59	54	61	61	53
Disagree	12	10	11	14	11	12	11	9	19	11	8	18
There are no real differences between suppliers in the prices they charge												
Agree	39	34	39	45	38	43	37	46	42	37	46	41
Disagree	38	46	38	31	41	29	42	31	39	42	30	37
Switching is pointless because all suppliers increase their prices at the same time												
Agree	48	45	44	59	44	60	43	59	54	44	57	54
Disagree	33	42	35	22	37	23	40	21	27	39	25	26
It pays to stay loyal to a particular supplier												
Agree	34	23	33	50	31	45	30	46	42	29	45	42
Disagree	46	57	48	31	50	36	52	35	35	53	35	37
Suppliers try and do the best for their customers												
Agree	36	32	33	44	32	46	35	40	38	35	39	38
Disagree	35	37	37	29	38	27	36	29	35	36	30	35
You can't believe what gas and electricity salespeople tell you												
Agree	68	68	65	72	67	70	67	70	73	66	69	71
Disagree	11	11	12	9	12	10	11	10	11	12	10	12
I like my current supplier because they have given me a high standard of service												
Agree	57	57	53	63	51	73	57	61	55	56	60	55
Disagree	13	12	15	11	15	6	13	11	18	13	11	20
I'm happy with my supplier, and I see no need to switch												
Agree	72	68	70	80	68	85	68	78	75	69	79	71
Disagree	11	12	11	9	13	5	11	8	11	12	8	14

Source: Ipsos MORI

Customer views of suppliers can be somewhat contradictory. A strong majority (over seven in ten) say they are happy with their supplier and see no need to switch. But only slightly fewer (60%) believe some energy suppliers are more trustworthy and reliable than others. A majority like their current supplier because of the high standard of service, yet customers are deeply split on whether suppliers try and do the best for their customers, whether there are any real differences in the prices they charge and whether it pays to stay loyal to a particular supplier. Similarly they are equally split on whether switching is pointless because suppliers all increase their prices at the same time. On the other hand, a strong majority are willing to condemn salespeople – 68% agree that you can't believe what gas and electricity salespeople tell you. These findings suggest there are some substantial gaps in customer knowledge about energy suppliers and the facts about their pricing and their differentiation. Gut feelings of loyalty to current suppliers are a powerful element for many, but such instant judgements can be equally hostile where unfavourable media coverage has highlighted particular issues, as in the case of salespeople.

Feelings of loyalty to suppliers are disproportionately high among social class DE, the 65+, quarterly and PPM payers, while being much lower among ABs and direct debit payers. Those who agree that there is no real difference in the prices charged by suppliers are most likely to be social class DE (especially E) and to pay by quarterly cheque/cash. These are also disproportionately non-switchers so there is a strong element of self-justification in their opinions. Furthermore, scepticism about the credibility of salespeople is also higher among the DEs, and especially among PPM customers. Hence many of their beliefs help to reinforce their lower openness to switching by taking refuge in either unsubstantiated assertions or generally negative stories from the media. This is not exclusively a phenomenon of the more disadvantaged groups, as our segmentation analysis shows overleaf, but it is more frequently a feature of them than other groups.

Worries and Concerns

Q40	**Can you tell me to what extent you agree or disagree with these statements on switching domestic energy suppliers?** *Base: All domestic gas/electricity customers who are responsible/jointly responsible for bills (2024)*

							Payment Method					
		Social grade			Age		Gas			Electricity		
	Total	AB	C1C2	DE	Under 65	65+	Direct Debit	Change /cash	PPM	Direct Debit	Change /cash	PPM
	(2024) %	*(377)* %	*(931)* %	*(716)* %	*(1594)* %	*(430)* %	*(919)* %	*(256)* %	*(380)* %	*(1062)* %	*(301)* %	*(486)* %
I worry that if I switch things will go wrong												
Agree	48	39	48	59	47	52	45	57	53	45	55	55
Disagree	35	44	36	25	36	33	39	28	31	39	30	27
I worry the service may be worse if I switch												
Agree	52	44	53	59	50	56	49	61	56	48	59	56
Disagree	27	35	26	20	27	25	32	17	22	31	18	23

Source: Ipsos MORI

Most customers see switching energy supplier as a potentially complicated transaction in some respects, and though many are confident they can cope with this, others may be paralysed into inaction by their concerns or anxieties. Almost half of all customers worry that if they switch something will go wrong, and more than half worry that the service may be worse if they switch. These are genuine concerns and cut through the whole customer base, though they are more frequently seen among the social class DEs, the 65+ and those who pay by quarterly means or by PPM. Among those who have never switched either fuel, 58% agree that they worry that if they switch things will go wrong. This is a very powerful perception of the likelihood of a switch going wrong and one which does not reflect the reality of a market in which 77% of recent switchers were satisfied with how smoothly the switch went and only 10% were dissatisfied. Of course it may be that the 10% who were dissatisfied make more noise about it and their negative opinions feed into the anxieties and inertia of non-switchers. Our segmentation analysis looks at the extent to which those with higher anxieties are a discrete segment.

Saving Money

Q40 **Can you tell me to what extent you agree or disagree with these statements on switching domestic energy suppliers?**
Base: All domestic gas/electricity customers who are responsible/jointly responsible for bills (2024)

	Total	Social grade			Age		Payment Method: Gas			Payment Method: Electricity		
	Total	AB	C1C2	DE	Under 65	65+	Direct Debit	Change /cash	PPM	Direct Debit	Change /cash	PPM
	(2024) %	*(377)* %	*(931)* %	*(716)* %	*(1594)* %	*(430)* %	*(919)* %	*(256)* %	*(380)* %	*(1062)* %	*(301)* %	*(486)* %
Switching energy supplier is a good way to save money												
Agree	47	54	48	39	51	37	55	39	40	53	38	40
Disagree	25	18	26	32	23	33	21	31	35	22	30	34
The savings you can make from switching supplier are not worth the hassle												
Agree	51	46	50	60	46	66	47	57	56	48	59	54
Disagree	30	36	32	20	34	19	36	20	26	35	19	27
The savings will only last for a short time so I don't think it is worth switching												
Agree	57	53	56	61	53	68	54	65	59	54	66	57
Disagree	22	29	21	16	24	14	26	11	18	26	12	18
I check now and again to see if it is worth me switching												
Agree	32	39	32	24	35	21	37	20	23	36	22	22
Disagree	56	51	55	63	52	67	51	66	66	52	63	66

Source: Ipsos MORI

Most research to date on switching energy suppliers shows that the motive of saving money dominates all other motives for switching. Hence if there is doubt that promised savings will materialise this is likely to have a strong dampening effect on the vibrancy of the market. For example, a justification for reluctance to switch is the belief by a majority (57%) that the savings will only last for a short time so it is not worth switching. At the same time, just under half (47%) agree that switching supplier is a good way to save money, by no means a resounding endorsement of the effectiveness of the competitive market. It rises to only 57% for those who have ever switched. Higher social class groups and direct debit payers tend to agree more strongly; the DEs and quarterly or PPM payers less strongly. On the same theme, a small majority (51%) agree that the savings you can make from switching supplier are not worth the hassle. As would be expected, a majority (62%) of non-switchers believe this, but 45% of switchers, and over one third of recent switchers (34%) also believe it. This is despite the finding that 61% of recent switchers are actually satisfied with the amount they have saved by switching with only 11% dissatisfied.

One third of customers say they check now and again to see if it is worth them switching. Again this is primarily an upmarket viewpoint: ABs, the under 65s and direct debit customers are most likely to agree with this, though even among ABs only 39% agree. In a dynamic marketplace one might expect this checking to take place relatively often; customer segmentation shows how it is concentrated in certain segments of the population.

Other Issues

Q40 **Can you tell me to what extent you agree or disagree with these statements on switching domestic energy suppliers?**
Base: All domestic gas/electricity customers who are responsible/jointly responsible for bills (2024)

							Payment Method					
		Social grade			Age		Gas			Electricity		
	Total	AB	C1C2	DE	Under 65	65+	Direct Debit	Change /cash	PPM	Direct Debit	Change /cash	PPM
	(2024) %	*(377)* %	*(931)* %	*(716)* %	*(1594)* %	*(430)* %	*(919)* %	*(256)* %	*(380)* %	*(1062)* %	*(301)* %	*(486)* %
If I am in debt with my current supplier I cannot switch												
Agree	22	15	23	25	22	20	20	23	32	20	22	30
Disagree	25	27	25	22	27	18	26	20	26	26	21	25
Switching is not relevant to me because of my housing circumstances												
Agree	16	14	15	19	14	21	13	18	18	14	16	19
Disagree	60	67	61	51	63	52	64	56	57	63	57	57
If I have a boiler maintenance contract with my supplier I cannot switch												
Agree	9	8	9	12	9	11	9	10	11	9	10	9
Disagree	35	40	37	26	37	30	40	31	29	38	29	30

Source: Ipsos MORI

Some mistaken beliefs may contribute to reluctance to switch by a few people. For example, among those who are currently in debt to a gas or electricity supplier, almost a third (31%) agree that this means they cannot switch. Customers as a whole are almost equally split on this issue, with those on PPMs most likely of all to believe debt is an impediment to switching.

Among those with boiler or heating maintenance contracts with their suppliers, 16% agree that this means they cannot switch away from that company for their energy supply. Overall non-switchers are most likely to agree with this, that is, it is a belief that has not had a chance to be tested in reality.

Housing circumstances may constitute more of a real obstacle to the benefits of switching and are highly likely to affect a customer's attitudes to switching. Those in rented accommodation are significantly more likely than others to believe switching is not relevant to them because of their housing circumstances. There is some evidence this affects PPM customers more than others.

General Attitudes to being a customer

Q41 **And now I want to read out some statements about your more general attitudes. Again using the words on this card, can you tell me the extent to which you agree or disagree?**
Base: All domestic gas/electricity customers who are responsible/jointly responsible for bills (2024)

							Payment Method					
		Social grade			Age		Gas			Electricity		
	Total	AB	C1C2	DE	Under 65	65+	Direct Debit	Change /cash	PPM	Direct Debit	Change /cash	PPM
	(2024) %	*(377)* %	*(931)*	*(716)* %	*(1594)* %	*(430)* %	*(919)* %	*(256)* %	*(380)* %	*(1062)* %	*(301)* %	*(486)* %
Financially, things are a bit of a struggle for me												
Agree	44	26	44	64	46	40	39	45	71	38	43	70
Disagree	40	56	39	23	38	44	45	40	16	46	41	17
I always like to look for ways I can save some money, even if it is only a little												
Agree	76	71	77	80	78	72	78	75	82	76	73	82
Disagree	14	18	12	12	11	20	13	14	10	14	13	9
I have a fair bit of spare time												
Agree	44	37	41	57	35	72	42	51	51	41	49	50
Disagree	46	54	48	33	55	19	48	37	40	49	39	41
I don't like dealing with call centres												
Agree	82	81	82	83	80	88	82	82	83	82	82	83
Disagree	9	10	8	8	10	5	9	8	8	9	6	9
I always feel some worry or anxiety when things I am used to start to change												
Agree	52	44	49	64	48	63	47	59	59	48	58	59
Disagree	31	41	32	21	34	22	36	27	25	35	27	26
I always find out everything I can about a product before I decide to buy it												
Agree	73	75	73	71	72	75	75	78	66	74	77	67
Disagree	16	16	15	16	15	17	15	11	22	15	12	21
I prefer to talk to a salesperson before I buy things												
Agree	54	53	51	60	52	61	55	56	60	53	54	60
Disagree	25	27	26	23	27	21	25	20	24	27	22	25
I often make decisions on an impulse												
Agree	26	22	27	30	29	18	24	26	37	25	22	37
Disagree	61	65	61	57	56	75	63	61	51	63	64	49

Cont'/

	Total	Social grade			Age		Payment Method: Gas			Payment Method: Electricity		
		AB	C1C2	DE	Under 65	65+	Direct Debit	Change /cash	PPM	Direct Debit	Change /cash	PPM
	(2024) %	*(377)* %	*(931)*	*(716)* %	*(1594)* %	*(430)* %	*(919)* %	*(256)* %	*(380)* %	*(1062)* %	*(301)* %	*(486)* %
Everything seems to be getting more complicated nowadays												
Agree	71	64	69	80	67	81	68	79	76	67	78	75
Disagree	15	21	14	10	17	10	17	8	14	18	9	14
I think about the effects on the environment of my purchasing decisions												
Agree	53	57	53	49	53	52	53	56	47	53	56	47
Disagree	26	21	26	32	26	28	25	28	36	25	25	36

Source: Ipsos MORI

General attitudes to being a customer may underpin customer views of the energy market specifically. These are fed into our segmentation analysis overleaf. Most notable is the majority that always looks for ways to save money, even if only a little – this should be a key driver of the energy market, all other things being equal. Furthermore 44% have some kind of financial difficulty nowadays, so saving money should be a consideration.

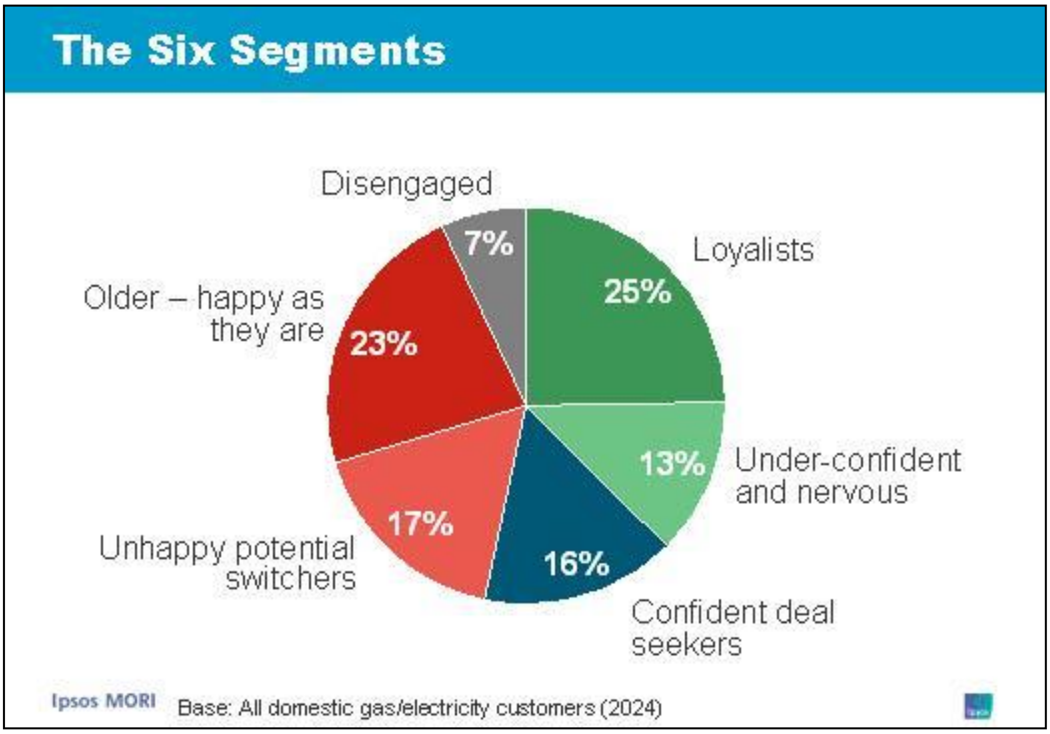
Other elements constitute limitations on the effectiveness of the energy market. A majority say they always prefer to talk to a salesperson before buying things, yet the salespeople of the energy industry are tainted by poor publicity and unable to realise their full potential. Over half (52%) are generally anxious about change and over eight in ten do not like dealing with call centres; both of these factors may be a feature of switching energy supplier. Customers are equally split into those who have a fair bit of spare time and those who do not. Given the preference of 73% to find out everything they can about a product before buying it, this may be a limitation on a market that requires some research to understand and to operate in effectively.

Segmentation

The survey shows it can be difficult to explain switching behaviour by demographic variables alone; yet the deep divisions on some attitudinal attributes suggest there may be "fault lines" within the customer base that could be identified and used to divide all customers into sub-groups by attitude. This kind of "segmentation" may help to make sense of our exploration of the market and guide future communication and messaging.

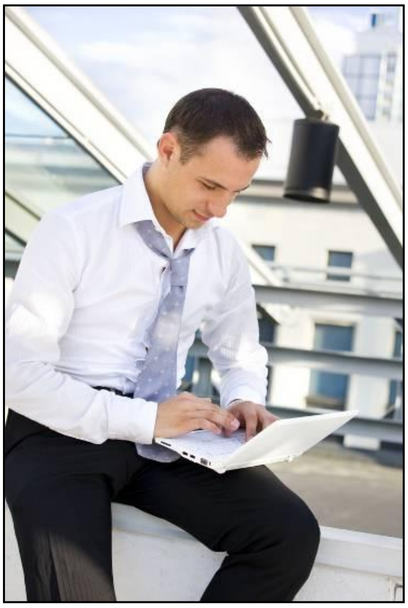
After reviewing the questionnaire, we identified the set of relevant attitudes and attributes on which to run the segmentation. We used two statistical techniques: a multi-stage segmentation process, with hierarchical clustering to create initial cluster solutions and then k-means clustering to fine-tune the results. The methods differ in that hierarchical clustering starts with each case in a separate cluster and combines clusters until only one is left, whereas k-means looks at distances between cases to group them. By using both methods, we create a more robust solution. To validate our results we created multiple solutions (i.e. 5, 6 and 7 possible segments) and profiled each to ensure our final solution was sound and actionable.

While both 5-segment and 7-segment solutions were evaluated, our preference was for a 6-segment solution because its segments were, in our view, most logical and discrete. The penetrations of the six segments within the total customer base are as follows:



For each segment, we give a general description of its defining characteristics, including the switching behaviour and intentions of its members. This is illustrated by a bar chart showing the principal attributes that differ most from the overall aggregate. Expressed as an index of the aggregate figure, green bars indicate notably high agreement with the statement, while red bars indicate notably high disagreement.

Loyalists (25%)



This largest segment is characterised by low switching rates and low intention to switch. They are positive towards energy suppliers, believing it pays to stay loyal and tend to believe there are no real differences between suppliers, all of which try to do the best for customers. However they are not generally aware of many energy suppliers.

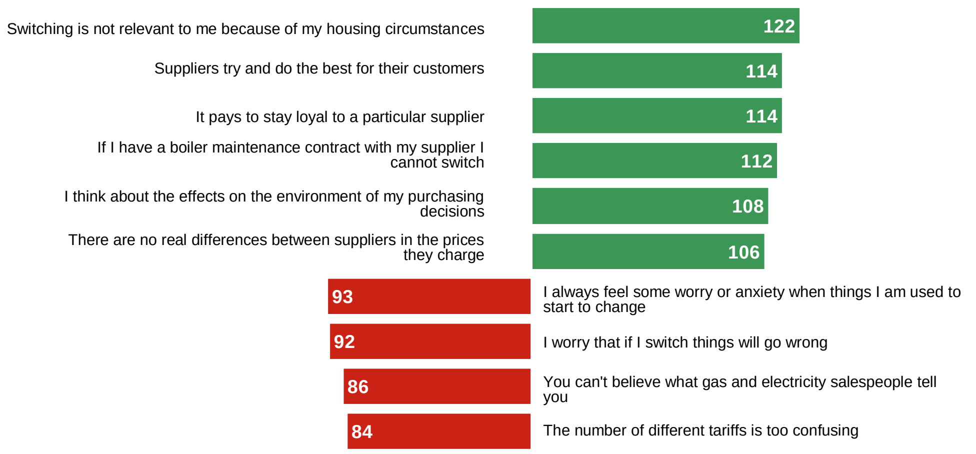
They are confident about the switching process and not overly anxious or confused about aspects of the market. In fact they do often check to see if it is worthwhile switching, but switching is not a priority to them with their busy lifestyle and good income. They are open to salespeople and comfortable with call centres. They are particularly concerned about the effects on the environment of their purchasing decisions.

They are likely to believe that having a boiler maintenance contract with a supplier restricts your ability to switch away from that supplier. Furthermore they are very likely to have such a contract themselves.

While they are found across all ages, they are most likely to be under 44, disproportionately male and full-time workers, from right across the social groups. They are more likely than average to rent their accommodation, and their housing circumstances are often a reason for their reluctance to switch.

Loyalists - Characteristics

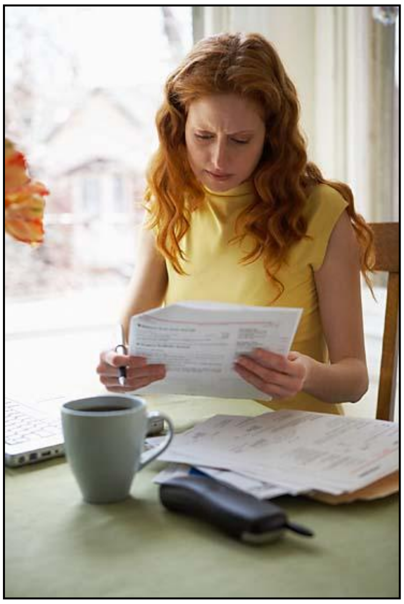
Agreement with statements (Index)



Base (Index 100): All domestic gas/electricity customers (2024)

Ipsos MORI

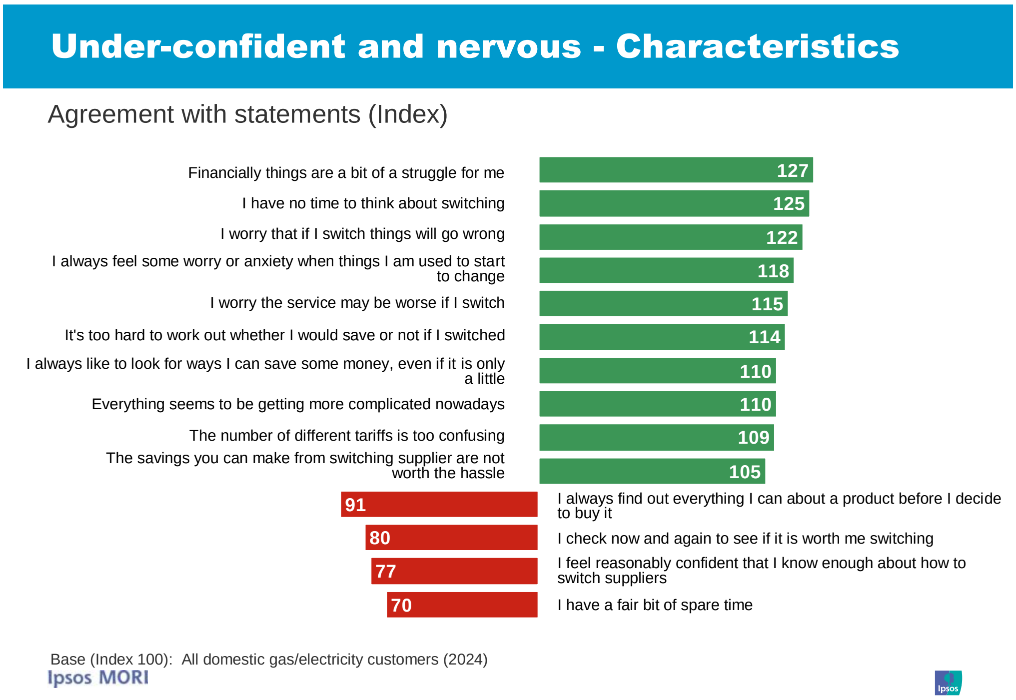
Underconfident and Nervous (13%)



This segment has less confidence about switching than any other. They are confused about many aspects of the energy market and feel the world is becoming more complicated. They are not well organised financially and tend to struggle (more than any other group). It follows that they are likely to be in debt to an energy supplier. They want to find ways to save money but their worries about switching make them loyal to current suppliers, almost by default. They don't see switching supplier as a good way to save money. They are not comfortable with change and their views are dominated by what could go wrong if they switch supplier.

They feel they have little spare time (which could perhaps be used to do the research to alleviate their anxieties). In fact they often make decisions on impulse.

This segment includes few previous switchers and they have a very low intention to switch in the future. They are relatively young (mostly 16-44) mainly female, and include many part-time workers and housewives. They are most likely to be from the lower social grades C2, D and E. Along with the Disengaged, this group are the most likely to rent their homes, especially from private landlords, and this is a factor in making them reluctant to switch.



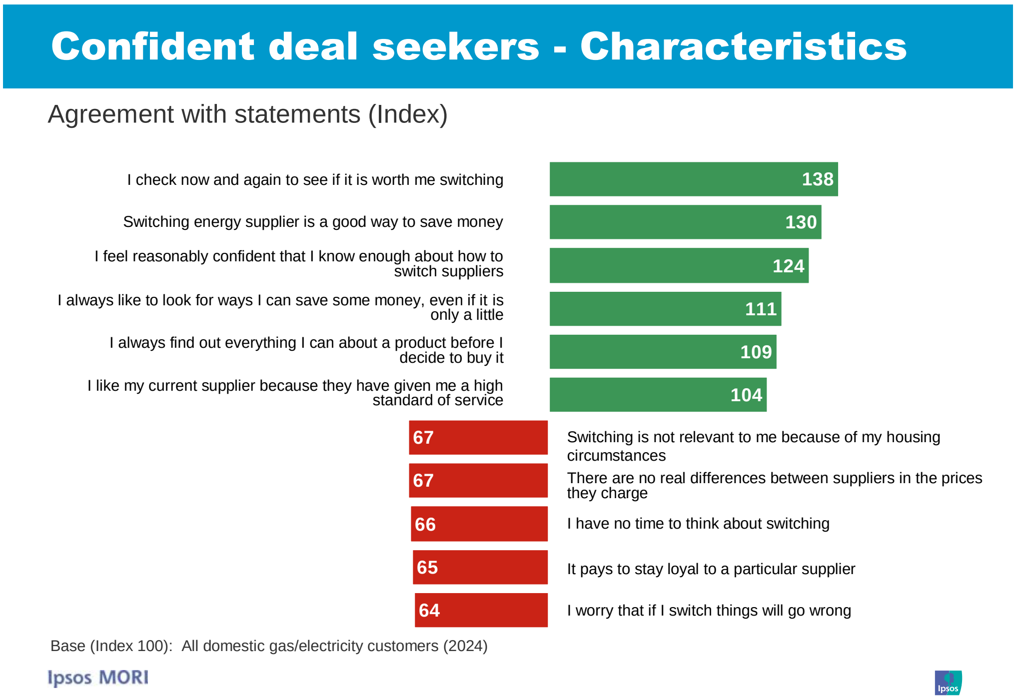
Confident Deal Seekers (16%)

This is the closest to a group of natural switchers. They are very confident about switching and its value to them in saving money. They are constantly on the lookout for a deal; they are highly aware of suppliers and the differences between them. Aspects of loyalty do not appeal to them; switching fits their lifestyle.

These are people who are in control financially and usually plan carefully ahead when purchasing something.

They have the highest level of past switchers of any segment, and a high intention of switching again.

They are most likely to be male, aged 25-54 and to be full-time workers. They are from the AB and C1 social groups, with few DEs.

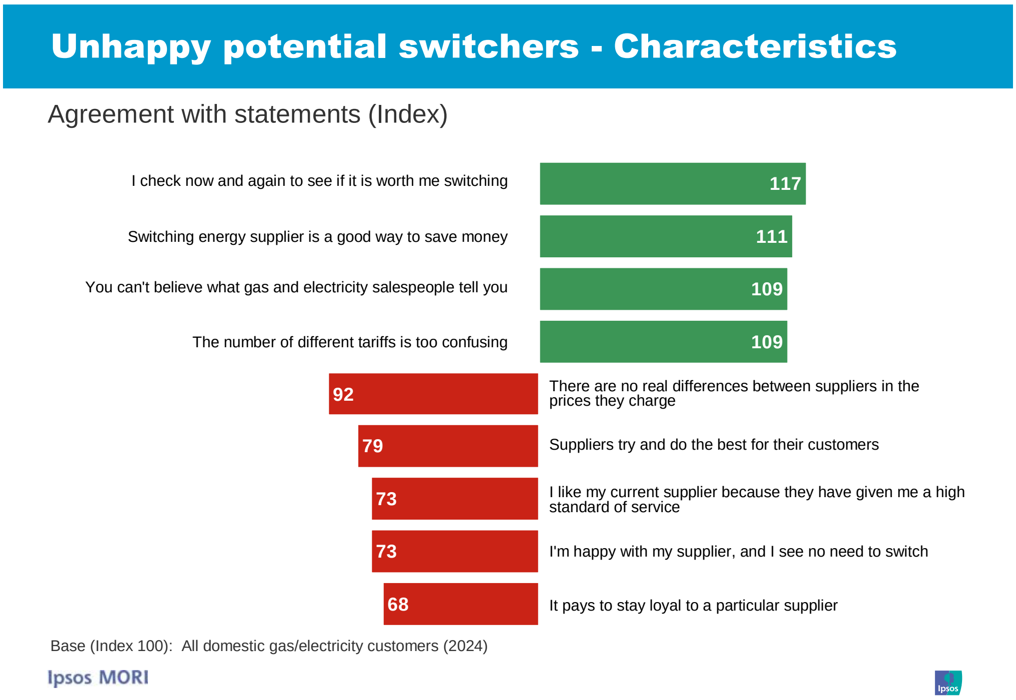


Unhappy Potential Switchers (17%)

Although keen on switching as a good way to save money, they are much less confident and more confused than the Confident Deal Seekers. Many have switched in the past and their intention to switch is very high, but they are not as well equipped as the former segment to do so. They show some concerns about what might go wrong if they switch and they are more likely to have financial problems.

Their motivation to switch is not just saving money. They are more unhappy with their supplier than any other segment, and suspicious of suppliers in general and their salespeople.

They are aged mainly 25-44 with no gender bias. They are mainly B, C1 and C2 full-time workers.



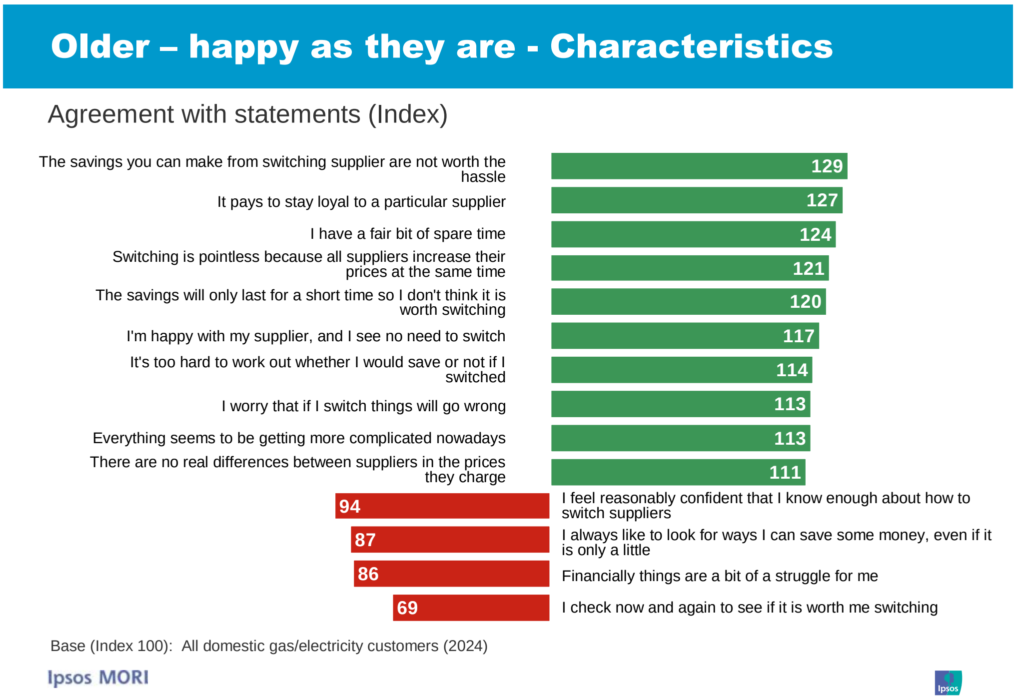
Older – Happy as they are (23%)

This older segment (mainly 55+, especially 65+) has the lowest penetration of past switchers and the lowest intention to switch in the future. In general they see no reason to switch and are happy with their current supplier. They believe it pays to stay loyal. They are fairly wealthy and not particularly interested in saving money.

They show a mixture of anxieties and other justifications of why they should not switch e.g. there are no real differences between suppliers, savings will only last for a short time, switching is pointless because all increase their prices at the same time.

They feel the world is getting too complicated, yet they have more spare time than any other segment. They distrust salespeople and particularly dislike call centres.

This segment is often males and mostly retired. There is a range of social grades, but many are E because they are retired.



Disengaged (7%)

This relatively small segment is characterised by chaotic financial circumstances. They are most likely of all to be in debt to energy companies and to be struggling financially. Yet they do very little about it – they are less likely than average to look for ways to save money and don't see switching energy supplier as any solution. They often make decisions on impulse.

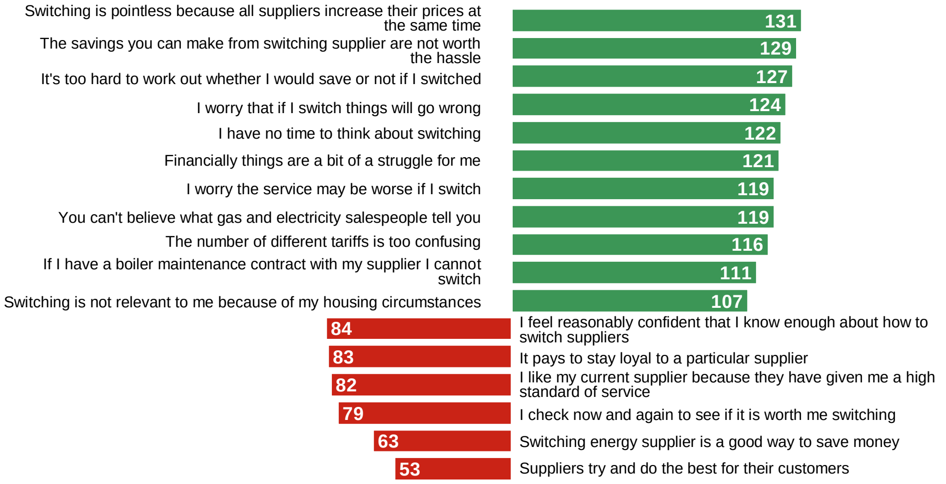
They are highly cynical about the differences between energy suppliers and believe strongly that switching is pointless because all raise prices at the same time. They think it is too hard to work out whether a switch would benefit them and do not check now and again to see if it is worthwhile switching. They cynically believe that switching might actually make things worse (the switch itself may go wrong and the service afterwards could be worse).

Many of them actually have switched in the past, though intention to switch (again) is low. Disengaged switchers are less satisfied than any other segment with all aspects of their most recent switch.

They are mainly middle-aged (35-54), mostly female, largely C2 or E, with few full-time workers and more than average numbers of housewives. Along with the Underconfident and Nervous, this group has the highest proportion of renters, particularly those who rent from councils or Housing Associations.

Disengaged - Characteristics

Agreement with statements (Index)



Base (Index 100): All domestic gas/electricity customers (2024)

Segments – Summary of Switching Behaviour and Intentions

		Switched either fuel in last 12 months	Switched either fuel ever	Likely to switch in next 12 months (at least fairly)	Propensity to switch (index)
		%	%	%	
Total	**(2024)**	**26**	**62**	**23**	**100**
Confident deal seekers	(288)	47	92	42	149
Unhappy potential switchers	(325)	31	75	52	135
Disengaged	(162)	25	67	15	97
Loyalists	(495)	24	52	14	86
Underconfident and nervous	(286)	21	52	16	86
Older – happy as they are	(468)	12	46	4	65

Source: Ipsos MORI

The Confident Deal Seekers and the Unhappy Potential Switchers are taking a full and active part in the competitive energy market: most of them have switched in the past; between one third and a half of them have switched in the past year and around half intend to switch again in the next year. The Disengaged have mostly experienced switching, but it may have been a disappointing experience, recent activity has been average and their intentions of future switching are fairly low. Loyalists and the Underconfident and Nervous are not comprised of non-switchers – their rate of switching in the past year is only slightly below the population as a whole – and half of them have switched at some time, but intentions to switch in future are fairly low. They represent a large proportion of the customer base who are only taking a partial role in the workings of the market. At the bottom is the Older – Happy As They Are segment, which is the least active part of the market. The proportion who have ever switched is perhaps surprisingly large (46%), but recent switching is low and intentions to switch extremely low.

We can gauge the susceptibility of each segment to the influence of salespeople by looking at the proportion of recent switchers who stated that a salesperson was involved in their switch:

Segments – Salesperson influence

	Total	Loyalists	Under-confident and Nervous	Confident deal seekers	Unhappy potential switchers	Older – happy as they are	Dis-engaged
	(538)	*(123)*	*(66)*	*(143)*	*(105)*	*(59)*	*(42)*
	%	%	%	%	%	%	%
Switched with involvement of salesperson	53	59	63	39	55	52	76
Own enquiries	35	31	21	51	36	30	13

Q24 **(On that last occasion), would you say you switched as a direct result of a visit or telephone call from a supplier's salesperson or was it from making your own enquiries?**
Base: All domestic gas/electricity customers who are responsible/jointly responsible for bills who switched in the last 12 months

Source: Ipsos MORI

The Disengaged and the Underconfident and Nervous appear, from the experience of the last 12 months, to be most susceptible to salesperson influence. The Disengaged, in particular, are least likely to have made any of their own enquiries proactively. At the other end of the scale, the Confident Deal Seekers are least affected by salespeople, and are most likely to make their own enquiries. The other three segments show proportions involving salespeople close to the average for all customers, though of these, the Loyalists are most likely to have switched reactively.

Segments – Payment methods

Q6 **How do you pay for the gas you use?**
Base: All domestic gas customers who are responsible/jointly responsible for bills (1707)

	Total	Loyalists	Under-confiden t and Nervous	Confident deal seekers	Unhappy potential switchers	Older – happy as they are	Dis-engaged
	(1707)	(404)	(241)	(248)	(276)	(398)	(140)
	%	%	%	%	%	%	%
Monthly/quarterly direct debit	66	64	54	83	72	61	53
Quarterly, cheque/cash	16	16	21	6	15	21	13
PPM	10	10	14	7	7	10	19
Payment card/book	5	5	5	1	4	6	6
Weekly/fortnightly payment scheme	2	2	4	*	1	2	8
Fuel Direct	*	*	*	1	*	*	-
Other	1	1	2	1	*	*	-
Don't know/None	1	2	-	*	-	-	1

Source: Ipsos MORI

Q13 **How do you pay for the electricity you use?**
Base: All domestic electricity customers who are responsible/jointly responsible for bills (2008)

Payment method - electricity

	All	Loyalists	Under-confident and Nervous	Confident deal seekers	Unhappy potential switchers	Older – happy as they are	Dis-engaged
	(2008)	(490)	(280)	(286)	(324)	(464)	(160)
	%	%	%	%	%	%	%
Monthly/quarterly direct debit	65	63	54	81	70	59	54
Quarterly cheque/cash	17	18	19	9	15	23	13
PPM	11	10	16	7	11	10	19
Payment card/book	4	3	5	1	3	4	7
Weekly/fortnightly payment scheme	2	3	4	*	-	2	5
Fuel Direct	*	-	*	*	*	*	-
Other	1	3	1	1	1	1	1
Don't know/None	*	1	*	*	-	1	*

Source: Ipsos MORI

All three principal payment methods are found among all six segments, though in varying proportions. Segments with the highest levels of past switching (Confident Deal Seekers and Unhappy Potential Switchers) also show the highest incidence of direct debit. By contrast, it is the Disengaged and the Underconfident and Nervous who are least likely to use direct debit. Payment by quarterly cheque/cash is most frequently found among the Older – Happy As They Are and Underconfident and Nervous segments. Confident Deal Seekers are, by far, least likely to pay by quarterly cheque/cash. PPM customers are again found across all segments, but are particularly numerous among the Disengaged and the Underconfident and Nervous; this fits well with the characteristic of high levels of debt in both segments. Confident Deal Seekers have the fewest PPM customers, along with the Unhappy Potential Switchers (in gas, though not in electricity). The remaining segments, Loyalists and Older-Happy As They Are, have broadly average levels of PPM usage.

The minor payment methods, often associated with disadvantage, are rarely used by Confident Deal Seekers and Unhappy Potential Switchers, though some of the latter segment have Payment cards/books. Most likely to have Payment cards/books are the Older-Happy As They Are and Disengaged segments in gas, and the Disengaged and Underconfident and Nervous in electricity. Weekly/fortnightly schemes are most likely to be used by the Disengaged, though there are a few in most of the other segments.

Appendices

Q6	How do you pay for the gas you use? *Base: All domestic gas customers who are responsible/jointly responsible for bills (1707)*											
		Social Grade			**Age**			**Region**			**Tenure**	
	Total	**AB**	**C1C2**	**DE**	**16-34**	**35-64**	**65+**	**Eng-land**	**Scot-land**	**Wales**	**Rented**	**Non-rented**
	(1707) %	*(308)* %	*(781)* %	*(618)* %	*(426)* %	*(934)* %	*(347)* %	*(1452)* %	*(146)* %	*(108)* %	*(708)* %	*(987)* %
Monthly or quarterly direct debit	66	87	67	41	58	66	71	66	59	73	40	77
Pay by cheque, cash or card on receipt of quarterly bill	16	8	17	21	14	15	20	17	12	8	16	16
Prepayment meter	10	3	9	20	17	11	3	10	5	13	25	3
Payment card/Book that I use whenever I choose (ad hoc)	5	*	4	9	6	4	4	4	11	4	12	1
Weekly/fortnightly payment scheme	2	1	1	6	3	2	2	2	8	1	5	1
Fuel Direct (where a set amount is deducted from your benefits before you receive them)	*	-	-	1	1	*	1	*	-	-	1	*
Other	1	2	1	1	1	1	*	1	2	1	1	1

Source: Ipsos MORI

Q13 **How do you pay for the electricity you use?**
Base: All domestic electricity customers who are responsible/jointly responsible for bills (2008)

		Social Grade			Age			Region			Tenure	
	Total	**AB**	**C1C2**	**DE**	**16-34**	**35-64**	**65+**	**Eng-land**	**Scot-land**	**Wales**	**Rented**	**Non-rented**
	(2008) %	*(376)* %	*(921)* %	*(711)* %	*(493)* %	*(1090)* %	*(425)* %	*(1713)* %	*(166)* %	*(128)* %	*(799)* %	*(1193)* %
Monthly or quarterly direct debit	65	85	66	40	58	66	67	65	59	70	38	76
Pay by cheque, case or card on receipt of quarterly bill	17	11	18	21	13	15	23	17	15	12	17	17
Prepayment meter	11	3	9	23	19	11	4	11	6	11	28	4
Payment card/Book that I use whenever I choose (ad hoc)	4	*	3	7	5	3	3	3	9	3	9	1
Weekly/fortnightly payment scheme	2	-	1	6	2	2	2	2	6	1	4	1
Fuel Direct (where a set amount is deducted from your benefits before you receive them)	*	-	-	1	*	*	*	*	-	-	1	*
Other	1	*	2	2	1	2	1	1	5	2	3	1

Source: Ipsos MORI

Q36 **Are you currently on a dual fuel deal, where you make one payment for both gas and electricity together?**
Base: All domestic gas/electricity customers who are responsible/jointly responsible for bills (2024)

		Social Grade			Age			Region			Tenure	
	Total	**AB**	**C1C2**	**DE**	**16-34**	**35-64**	**65+**	**Eng-land**	**Scot-land**	**Wales**	**Rented**	**Non-rented**
	(2024) %	*(377)* %	*(931)* %	*(716)* %	*(497)* %	*(1097)* %	*(430)* %	*(1724)* %	*(167)* %	*(132)* %	*(806)* %	*(1202)* %
No, two separate payments (can be to same supplier)	48	42	46	57	50	48	45	48	51	44	56	44
Yes, dual fuel	36	42	36	27	35	37	34	37	28	32	28	39
Have electricity only, no gas	12	13	12	10	8	11	16	12	11	16	9	13
Have gas only, no electricity	*	-	*	*	*	*	-	*	-	-	1	*
Don't know	5	3	5	6	7	4	5	4	10	9	7	4

Source: Ipsos MORI

Q7	**Which company currently supplies your gas?** *Base: All domestic gas customers who are responsible/jointly responsible for bills (1707)*
	( )
	%
Atlantic Electric and Gas	2
British Gas	37
Countrywide	-
EBICO	*
EDF Energy	5
E.ON	9
First Utility	-
Green Energy UK	-
London Energy	*
npower	13
Nwy Prydain	-
Powergen	2
Sainsbury's Energy	1
Scottish Gas	3
Scottish Hydro	2
ScottishPower	8
ScottishPower Manweb	*
Seeboard Energy	*
Southern Electric	10
Spark Energy Supply	-
Swalec	3
SWEB Energy	-
Telecom Plus	*
The National Trust Green Energy	*
Utilita	*
Union Energy	*
Other	*
Don't know	2

Source: Ipsos MORI

Q14	**Which company currently supplies your electricity?**
	Base: All domestic electricity customers who are responsible/jointly responsible for bills 2008)

	( ) %
Atlantic Electric and Gas	1
British Gas	23
Countrywide	-
EBICO	*
Ecotricity	*
EDF Energy	8
E.ON	12
First Utility	-
Good Energy	*
Green Energy UK	-
London Energy	*
npower	13
Nwy Prydain	-
Powergen	2
Sainsbury's Energy	1
Scottish Gas	2
Scottish Hydro	2
ScottishPower	10
ScottishPower Manweb	1
Seeboard Energy	*
Southern Electric	14
Spark Energy Supply	-
Swalec	4
SWEB Energy	*
Telecom Plus	*
The National Trust Green Energy	*
Union Energy	*
Utilita	*
Other	1
Don't know	4

Source: Ipsos MORI

Q42	**Do you or anyone else responsible for the gas or electricity bills in your household have a current account with a bank?**
	Base: All domestic gas/electricity customers who are responsible/jointly responsible for bills (2024)

	( ) %
Yes	94
No	5
Don't know	1

Source: Ipsos MORI

Q43	**Are you currently in debt to a gas or electricity supplier?** *Base: All domestic gas/electricity customers who are responsible/jointly responsible for bills (2024)*
	( ) %
Yes	6
No	92
Don't know	2
	Source: Ipsos MORI

Q44	**Do you have a boiler or heating maintenance contract with your gas or electricity supplier?** *Base: All domestic gas/electricity customers who are responsible/jointly responsible for bills (2024)*
	( ) %
Yes	20
No	76
Don't know	3
	Source: Ipsos MORI

Ipsos MORI/33592/bb01 Questionnaire No: ☐☐

Sampling point number

☐☐☐

Ofgem Customer Engagement Survey 2008 Mainstage
Final 12th June 2008

QA **Gender** SINGLE CODE ONLY

Male ☐

Female ☐

QB **Age** (WRITE IN AND MARK BOX). SINGLE CODE ONLY

☐

16-24 ☐

25-34 ☐

35-44 ☐

45-54 ☐

55-64 ☐

65+ ☐

QC **Working status**

Working - Full time (30+ hrs) ☐

Working - Part-time (9-29 hrs) ☐

Not working -Unemployed - seeking work ☐

Not working - Unemployed - not seeking work ☐

Not working – retired ☐

Not working - looking after house/children ☐

Not working - invalid/disabled ☐

Not working student ☐

Not working other ☐

Day of Interview SINGLE CODE ONLY

Monday ☐

Tuesday ☐

Wednesday ☐

Thursday ☐

Friday ☐

Saturday ☐

Sunday ☐

Date of Interview:

☐☐ / ☐☐ /08

Length of

☐☐ (minutes)

Interviewer Declaration
I confirm that I have carried out this Interview face-to-face with the named person of the address attached and that I asked all the relevant questions fully and recorded the answers in conformance with the survey specification and within the MRS Code of Conduct and the Data Protection Act 1998.

Signature:

Interviewer Name (CAPS):

Interviewer Number:

☐☐☐☐☐☐

THIS FORM IS THE PROPERTY OF Ipsos MORI
79-81 Borough Road, London SE1 1FY

Ipsos MORI

QD **Occupation of Chief Income Earner**
Position/rank/grade

Industry/type of company

Quals/degree/apprenticeship

Number of staff responsible for

REMEMBER TO PROBE FULLY FOR PENSION AND CODE FROM ABOVE

Class

A ☐
B ☐
C1 ☐
C2 ☐
D ☐
E ☐

QE **Respondent is:**

Chief Income Earner ☐
Not Chief Income Earner ☐

QF **Do you have any children aged under 16 living in your home?** SINGLE CODE ONLY

Yes ☐
No ☐

QG **How many people are living in your household?** SINGLE CODE ONLY

One ☐
Two ☐
Three ☐
Four ☐
Five or more ☐

QH

SHOWCARD L (R) **Which of these best describes the ownership of your home? Please read out the letter that applies.** SINGLE CODE ONLY.

A Owned outright (including leasehold) ☐
B Buying on mortgage ☐
C Rented from Council ☐
D Rented from housing association ☐
E Rented from private landlord ☐
Other ☐

QI ASK IF RENTED FROM PRIVATE LANDLORD (E AT QH): OTHERS GO TO QJ

Do you share responsibilities for the same electricity or gas bills as another tenant? SINGLE CODE ONLY

Yes ☐
No ☐

QJ **Would you be willing to take part in further surveys on this subject?** SINGLE CODE ONLY

Yes ☐
No ☐

INTERVIEWER RECORD END TIME AFTER DEMOGRAPHICS ☐☐ Hours ☐☐ Mins

INTERVIEWER RECORD START TIME

Hours		Mins	

INTRODUCTION/CONFIDENTIALITY

Good morning, afternoon, evening. My name is …… from Ipsos MORI, the research organisation, and we are conducting a short survey on behalf of Ofgem, the Government regulator for the electricity and gas industry. Would you be willing to answer a few questions?

I would like to assure you that all the information we collect will be kept in the strictest of confidence and used for research purpose only. It will not be possible to identify any particular individual or address in the results. First I have to check you are the right sort of person to interview . . . .

SCREENING QUESTIONS

S1 **Do have mains gas and/or mains electricity in your home?** MULTICODE OK

Yes – mains electricity..................	☐	ASK S2
Yes – mains gas	☐	
No – Neither..................................	☐	CLOSE

ASK IF YES – HAVE MAINS ELECTRICITY AND/OR GAS AT S1. OTHERS CLOSE

S2 **Are you responsible or jointly responsible for the gas or electricity bills in your household?** SINGLE CODE ONLY

Yes...	☐	ASK Q1
No	☐	CLOSE

CHECK RESPONDENT FITS YOUR DEMOGRAPHIC QUOTA

ASK IF YES, RESPONSIBLE OR JOINTLY RESPONSIBLE AT S2 OTHERS CLOSE.

Q1. **Were you aware before today that it is possible for domestic customers to switch to different gas or electricity suppliers?** SINGLE CODE ONLY

Yes...	☐
No	☐
Don't know	☐

Q2. **Can you please tell me what companies or suppliers you are aware of that can currently sell you electricity or gas?** MULTICODE OK. DO NOT PROMPT.

Atlantic Electric and Gas	☐	Scottish and Southern Energy	☐
British Gas	☐	Scottish Hydro	☐
Centrica	☐	ScottishPower	☐
Countrywide	☐	SEEBOARD Energy	☐
EBICo	☐	Spark Energy Supply	☐
Ecotricity	☐	Southern Electric	☐
EDF Energy	☐	Swalec	☐
E.ON UK	☐	SWEB Energy	☐
First Utility	☐	Telecom Plus	☐
Green Energy UK	☐	The National Trust Green Energy	☐
Good Energy	☐	Union Energy	☐
London Energy	☐	Utilita	☐
Manweb	☐	Other (WRITE IN AND MARK BOX)	☐
npower	☐		
Nwy Prydain	☐		
Powergen	☐	None	☐
Sainsbury's Energy	☐	Don't know	☐

Q3. COMPANY LOGOS SHOWCARD (R) **Which, if any, of these gas and electricity suppliers have you heard of (including any you mentioned earlier)? Please read out the letters that apply.** MULTICODE OK.

Q4. COMPANY LOGOS SHOWCARD (R) AGAIN **And which, if any, would you definitely <u>not</u> consider switching to? Again, please read out the letters that apply** MULTICODE OK

		Q3	Q4	
A	Atlantic Electric and Gas	☐	☐	ASK Q5
B	EBICO	☐	☐	
C	Ecotricity	☐	☐	
D	Good Energy	☐	☐	
E	British Gas	☐	☐	
F	Countrywide	☐	☐	
G	EDF Energy	☐	☐	
H	E.ON	☐	☐	
I	First Utility	☐	☐	
J	Green Energy UK	☐	☐	
K	npower	☐	☐	
L	Nwy Prydain	☐	☐	
M	Sainsbury's energy	☐	☐	
N	Scottish Gas	☐	☐	
O	Scottish Hydro	☐	☐	
P	ScottishPower	☐	☐	
Q	ScottishPower Manweb	☐	☐	
R	Southern Electric	☐	☐	
S	Spark Energy Supply	☐	☐	
T	Swalec	☐	☐	
U	Telecom Plus	☐	☐	
V	The National Trust Green Energy	☐	☐	
W	Utilita	☐	☐	
X	Union Energy	☐	☐	
	None of these	☐	☐	

ASK IF ATLANTIC, EBICO, ECOTRICITY OR GOOD ENERGY MENTIONED AT Q4 (A,B,C, OR D): OTHERS GO TO FILTER AT Q6

Q5. **Why would you not consider switching to. . .** (READ OUT WHICHEVER OF THE FOUR COMPANIES MENTIONED AT Q4A-D. MAY BE MORE THAN ONE) MULTICODE OK

- Would be worried they might run out of gas/electricity ☐
- They might go bust ☐
- Never heard of them ☐
- Would only switch to a British/Scottish/Welsh company ☐
- Worried I wouldn't get a good response to emergencies or technical problems like gas leaks or power cuts ☐
- They are too small ☐
- I'm just not interested in switching ☐
- I think they would be more expensive ☐
- I think they would have poor customer service ☐
- Other (WRITE IN AND MARK BOX) ☐
- Don't know ☐

ASK IF RESPONDENT HAS MAINS GAS AT S1: OTHERS GO TO Q13

Q6. SHOWCARD A (R) **How do you pay for the gas you use?** SINGLE CODE ONLY. **Please read out the letter that applies.**

- A Monthly or quarterly direct debit ☐
- B Pay by cheque, cash or card on receipt of quarterly bill ☐
- C Prepayment meter ☐
- D Fuel Direct (where a set amount is deducted from your benefits before you receive them) ☐
- E Weekly/fortnightly payment scheme ☐
- F Payment card/Book that I use whenever I choose (ad hoc) ☐
- Other ☐

Q7. SHOWCARD B (R) **Which company currently supplies your gas? Please read out the letter that applies.** SINGLE CODE ONLY

A	Atlantic Electric and Gas	☐	P	ScottishPower	☐
B	British Gas	☐	Q	ScottishPower Manweb	☐
C	Countrywide	☐	R	Seeboard Energy	☐
D	EBICO	☐	S	Southern Electric	☐
E	EDF Energy	☐	T	Spark Energy Supply	☐
F	E.ON	☐	U	Swalec	☐
G	First Utility	☐	V	SWEB Energy	☐
H	Green Energy UK	☐	W	Telecom Plus	☐
I	London Energy	☐	X	The National Trust Green Energy	☐
J	npower	☐	Y	Utilita	☐
K	Nwy Prydain	☐	Z	Union Energy	☐
L	Powergen	☐		Other (WRITE IN AND MARK BOX)	☐
M	Sainsbury's Energy	☐			
N	Scottish Gas	☐			
O	Scottish Hydro	☐		Don't know	☐

Q8. **Have you switched your gas supplier in the last 12 months, that is, since June 2007?** SINGLE CODE ONLY

Yes	☐	GO TO Q10
No	☐	ASK Q9

ASK IF NOT SWITCHED GAS SUPPLIER IN LAST 12 MONTHS (NO AT Q8) OTHERS GO TO Q10

Q9. **Have you ever switched your gas supplier?** SINGLE CODE ONLY

Yes	☐	ASK Q10
No	☐	GO TO Q13

ASK ALL EVER SWITCHED GAS SUPPLIER (YES AT Q8 OR Q9). OTHERS GO TO Q13

Q10. **How many times have you ever changed your gas supplier?** SINGLE CODE ONLY

- Once ☐
- Twice ☐
- Three times ☐
- Four times or more ☐
- Don't know ☐

Q11. SHOWCARD C (R) **Which company supplied your gas before that last switch? Please read out the letter that applies.** SINGLE CODE ONLY

A	Atlantic Electric and Gas	☐
B	British Gas	☐
C	Countrywide	☐
D	EBICO	☐
E	EDF Energy	☐
F	E.ON	☐
G	First Utility	☐
H	Green Energy UK	☐
I	London Energy	☐
J	npower	☐
K	Nwy Prydain	☐
L	Powergen	☐
M	Sainsbury's Energy	☐
N	Scottish Gas	☐
O	Scottish Hydro	☐
Q	ScottishPower	☐
P	ScottishPower Manweb	☐
R	Seeboard Energy	☐
S	Southern Electric	☐
T	Spark Energy Supply	☐
U	Swalec	☐
V	SWEB Energy	☐
W	Telecom Plus	☐
X	The National Trust Green Energy	☐
Y	Union Energy	☐
Z	Utilita	☐
AA	Virgin Home Energy	☐
	Other (WRITE IN AND MARK BOX)	☐
	Don't know	☐

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Q12. SHOWCARD D (R) **What payment method did you use for gas <u>before</u> that last switch? Please read out the letter that applies.** SINGLE CODE ONLY

A	Monthly or quarterly direct debit	☐
B	Pay by cheque, cash or card on receipt of quarterly bill..........	☐
C	Prepayment meter	☐
D	Fuel Direct (where a set amount is deducted from your benefits before you receive them)	☐
E	Weekly/fortnightly payment scheme.......................................	☐
F	Payment card/Book that I use whenever I choose (ad hoc)....	☐
	Other	☐

ASK IF HAS MAINS ELECTRICITY AT S1: OTHERS GO TO Q20

Q13. SHOWCARD D (R) AGAIN **How do you pay for the electricity you use? Please read out the letter that applies.** SINGLE CODE ONLY

A	Monthly or quarterly direct debit	☐
B	Pay by cheque, case or card on receipt of quarterly bill.........	☐
C	Prepayment meter	☐
D	Fuel Direct (where a set amount is deducted from your benefits before you receive them)	☐
E	Weekly/fortnightly payment scheme......................................	☐
F	Payment card/Book that I use whenever I choose (ad hoc)...	☐
	Other	☐

Q14. SHOWCARD E (R) **Which company currently supplies your electricity? Please read out the letter that applies.** SINGLE CODE ONLY

A	Atlantic Electric and Gas ...	☐	Q	Scottish Hydro ...	☐
B	British Gas ...	☐	R	ScottishPower ...	☐
C	Countrywide ...	☐	S	ScottishPower Manweb ...	☐
D	EBICO ...	☐	T	Seeboard Energy ...	☐
E	Ecotricity ...	☐	U	Southern Electric ...	☐
F	EDF Energy ...	☐	V	Spark Energy Supply ...	☐
G	E.ON ...	☐	W	Swalec ...	☐
H	First Utility ...	☐	X	SWEB Energy ...	☐
I	Good Energy ...	☐	Y	Telecom Plus ...	☐
J	Green Energy UK ...	☐	Z	The National Trust Green Energy ...	☐
K	London Energy ...	☐	AA	Union Energy ...	☐
L	npower ...	☐	BB	Utilita ...	☐
M	Nwy Prydain ...	☐		Other (WRITE IN AND MARK BOX) ...	☐
N	Powergen ...	☐			
O	Sainsbury's Energy ...	☐			
P	Scottish Gas ...	☐		Don't know ...	☐

Q15. **Have you switched your electricity supplier in the last 12 months, that is, since June 2007?** SINGLE CODE ONLY

Yes ...	☐	GO TO Q17
No ...	☐	ASK Q16

ASK IF NOT SWITCHED ELECTRICITY SUPPLIER IN LAST 12 MONTHS (NO AT Q15): OTHERS GO TO Q17

Q16. **Have you <u>ever</u> switched your electricity supplier?** SINGLE CODE ONLY

Yes ...	☐	GO TO Q17
No ...	☐	GO TO FILTER AT Q20

ASK ALL EVER SWITCHED ELECTRICITY SUPPLIER (YES AT Q15 OR Q16): OTHERS GO TO FILTER AT Q20

Q17. **How many times have you ever changed your electricity supplier?** SINGLE CODE ONLY

- Once ☐
- Twice ☐
- Three times ☐
- Four times or more ☐
- Don't know ☐

Q18. SHOWCARD F **Which company supplied your electricity before that last switch? Please read out the letter that applies.** SINGLE CODE ONLY

A	Atlantic Electric and Gas	☐
B	British Gas	☐
C	Countrywide	☐
D	EBICO	☐
E	Ecotricity	☐
F	EDF Energy	☐
G	E.ON	☐
H	First Utility	☐
I	Good Energy	☐
J	Green Energy UK	☐
K	London Energy	☐
L	npower	☐
M	Nwy Prydain	☐
N	Powergen	☐
O	Sainsbury's Energy	☐
P	Scottish Gas	☐
Q	Scottish Hydro	☐
R	ScottishPower Manweb	☐
S	ScottishPower	☐
T	Seeboard Energy	☐
U	Southern Electric	☐
V	Spark Energy Supply	☐
W	Swalec	☐
X	SWEB Energy	☐
Y	Telecom Plus	☐
Z	The National Trust Green Energy	☐
AA	Union Energy	☐
BB	Utilita	☐
CC	Virgin Home Energy	☐
	Other (WRITE IN AND MARK BOX)	☐
	Don't know	☐

Q19. SHOWCARD G (R) **What payment method did you use for electricity <u>before</u> that last switch? Please read out the letter that applies.** SINGLE CODE ONLY

A	Monthly or quarterly direct debit	☐
B	Pay by cheque, case or card on receipt of quarterly bill	☐
C	Prepayment meter	☐
D	Fuel Direct (where a set amount is deducted from your benefits before you receive them)	☐
E	Weekly/fortnightly payment scheme	☐
F	Payment card/Book that I use whenever I choose (ad hoc)	☐
	Other	☐

ASK IF SWITCHED EITHER GAS OR ELECTRICITY SUPPLIER IN THE LAST 12 MONTHS (YES AT Q8 OR Q15): OTHERS GO TO Q31

Q20. **Can I just check, on the last occasion when you switched either gas or electricity supplier, did you switch…** (READ OUT a-d). SINGLE CODE ONLY

a	**gas supplier only**	☐	ASK Q21
b	**electricity supplier only**	☐	GO TO Q22
c	**both gas and electricity at once (and now use one company)**	☐	GO TO Q23
d	**both gas and electricity at once (and now use two companies)**	☐	ASK Q21

Q21. ASK IF SWITCHED GAS SUPPLIER OR USE TWO COMPANIES (CODE a OR d AT Q20): OTHERS GO TO FILTER AT Q22

How much do you now spend on gas? You may answer weekly, monthly or quarterly on average? MARK APPROPRIATE BOX AND WRITE IN BELOW USING LEADING ZEROS

Weekly	☐
Monthly	☐
Quarterly	☐
Annually (if volunteered)	☐
Don't know	☐

£ ☐☐☐☐

ASK IF SWITCHED ELECTRICITY SUPPLIER OR USE TWO COMPANIES (CODE b OR d AT Q20). OTHERS GO TO FILTER AT Q23

Q22. **How much do you now spend on electricity? You may answer weekly, monthly or quarterly on average?** MARK APPROPRIATE BOX AND WRITE IN BELOW USING LEADING ZEROS

Weekly	☐
Monthly	☐
Quarterly	☐
Annually (if volunteered)	☐
Don't know	☐

£ ☐☐☐☐

IF SWITCHED BOTH GAS AND ELECTRICITY SUPPLIER AND NOW USE ONE COMPANY (CODE c AT Q20). OTHERS GO TO Q24

Q23. **How much do you now spend altogether on both gas and electricity?** MARK APPROPRIATE BOX AND WRITE IN BELOW USING LEADING ZEROS

Weekly	☐
Monthly	☐
Quarterly	☐
Annually (if volunteered)	☐
Don't know	☐

£ ☐☐☐☐

Q24. **(On that last occasion), would you say you switched as a direct result of a visit or telephone call from a supplier's salesperson or was it from making your own enquiries?** IF SALESPERSON, ASK: **Was that a visit, a telephone call or in a public place?** SINGLE CODE ONLY

Salesperson – visit to home (doorstep)	☐	
Salesperson – telephone call...	☐	ASK Q25
Salesperson – in shopping centre, public place etc	☐	
Own enquiries	☐	GO TO FILTER AT Q27
Both salesperson and own enquiries (volunteered)	☐	ASK Q25
Other	☐	GO TO FILTER AT Q27

ASK IF SWITCHED AS RESULT OF CONTACT WITH SALESPERSON OR BOTH SALESPERSON AND OWN ENQUIRIES AT Q24: OTHERS GO TO Q27

Q25. **(On that occasion,) what made you decide to switch?** MULTICODE OK. DO NOT PROMPT.

- To get rid of the salesperson .... ☐
- Liked the salesperson/felt sorry for them............ ☐
- They told me I would save money/cheaper than current supplier .... ☐
- They said there was no standing charge............ ☐
- They offered an incentive (eg cashback, Nectar points etc).. ☐
- Other (WRITE IN AND MARK BOX) .... ☐
- Don't know/can't remember................................ ☐

Q26. **And can you remember, did the salesperson say they were cheaper than your current supplier or did they tell you they were the cheapest on the market?** SINGLE CODE ONLY

- Cheaper than current.................................... ☐
- Cheapest on market .... ☐
- Didn't say they were cheaper at all............... ☐
- Don't know/can't remember.......................... ☐

ASK IF SWITCHED EITHER GAS OR ELECTRICITY SUPPLIER IN THE LAST 12 MONTHS (YES AT Q8 OR Q15): OTHERS GO TO Q31

Q27. **What kind of incentive, if any, did you receive at the time of switching, just for signing up? For example cashback or Nectar points?** MULTICODE OK

- Cashback ☐
- Nectar Points ☐
- Gift of wine ☐
- Other (WRITE IN AND MARK BOX) ☐
- None ☐

Q28. SHOWCARD H (R) **Still thinking about that last occasion when you made a switch, using the words on this card, how satisfied were you with:** READ OUT (a-d). ALTERNATE ORDER AND TICK START. SINGLE CODE ONLY FOR EACH

			Very satis-fied	Fairly satis-fied	Neither satisfied nor dissatis-fied	Fairly dis-satis-fied	Very dis-satis-fied	Don't know
☐	a	**the amount you believe you actually saved by switching**	☐	☐	☐	☐	☐	☐
	b	**the accuracy of any information you were given**	☐	☐	☐	☐	☐	☐
	c	**how smoothly the switch took place**	☐	☐	☐	☐	☐	☐
☐	d	**the choice of supplier that you made**	☐	☐	☐	☐	☐	☐

Q29. **Did you find out about the deals offered by other suppliers apart from the one you switched to?** SINGLE CODE ONLY

Yes	☐	GO TO Q30
No	☐	GO TO Q31
Don't know/can't remember	☐	

ASK IF FOUND OUT ABOUT OTHER SUPPLIER'S DEALS (YES AT Q29) OTHERS GO TO Q31

Q30. SHOWCARD I **Where did you get your information from? This card may remind you of some possible sources of information. Please just read out the letters that apply.** MULTICODE OK

A	Friends or family	☐
B	Phoning individual companies	☐
C	Newspapers, magazines or TV adverts....	☐
D	Martin Lewis..	☐
E	Suppliers' own websites	☐
F	Other suppliers' salespeople	☐
G	A price comparison website......................	☐
H	Energywatch	☐
	Other	☐
	Don't know/Can't remember	☐

ASK ALL

Q31. **Do you have access to the internet at home, at work or elsewhere?** SINGLE CODE ONLY

Yes...	☐	ASK Q32
No	☐	GO TO Q34

ASK IF HAS ACCESS TO INTERNET (YES AT Q31): OTHERS GO TO Q34

Q32. **Have you used the internet to find out about…** READ OUT a-d. SINGLE CODE ONLY FOR EACH

		Yes	NO
a	**comparative prices or savings for gas or electricity........**	☐	☐
b	**the suppliers themselves ....**	☐	☐
c	**the process of switching ....**	☐	☐
d	**comparative prices or savings on other services like insurance or telephone etc ....**	☐	☐

ASK IF RESPONDENT HAS ACCESS TO INTERNET (YES AT Q31) AND HAS SWITCHED GAS OR ELECTRICITY SUPPLIER IN THE LAST 12 MONTHS (YES AT Q8 AND/OR Q15): OTHERS GO TO Q34

Q33. **Did you actually use the internet to make your most recent switch?** SINGLE CODE ONLY

Yes	☐
No	☐
Don't know	☐

ASK ALL

Q34. SHOWCARD J (R) **How likely would you be to switch either electricity or gas supplier (again) in the next 12 months? Please read out the letter that applies.** SINGLE CODE ONLY

Q35. SHOWCARD J (R) AGAIN **And how likely would be to switch (again) at some time in the future? Please read out the letter that applies.** SINGLE CODE ONLY

		Q34	Q35
A	Definitely	☐	☐
B	Very likely	☐	☐
C	Fairly likely	☐	☐
D	Not very likely	☐	☐
E	Not at all likely	☐	☐
F	Definitely not	☐	☐
	Don't know	☐	☐

Q36. **Are you currently on a dual fuel deal, where you make one payment for both gas and electricity together?** SINGLE CODE ONLY

Yes, dual fuel	☐	GO TO Q39
No, two separate payments (can be to same supplier)	☐	ASK Q37
Have gas only, no electricity	☐	ASK Q37
Have electricity only, no gas	☐	GO TO Q38
Don't know	☐	GO TO Q39

Q37. ASK IF TWO SEPARATE PAYMENTS OR GAS ONLY AT Q36: OTHERS GO TO FILTER AT Q38

What is the <u>minimum</u> saving on gas you would need to be offered in order to make you willing to switch <u>gas supplier</u> in the near future? Please answer in pounds, weekly, monthly, quarterly on average or annually. MARK APPROPRIATE BOX AND WRITE IN USING LEADING ZEROES

- Weekly ☐
- Monthly ☐
- Quarterly ☐
- Annually (if volunteered) ☐
- Don't know ☐

£ ☐☐☐☐

Q38. ASK IF TWO SEPARATE PAYMENTS OR ELECTRICITY ONLY AT Q36: OTHERS GO TO FILTER AT Q39

What is the <u>minimum</u> saving on electricity you would need to be offered in order to make you willing to switch <u>electricity supplier</u> in the near future? Please answer in pounds, weekly, monthly, quarterly on average or annually. MARK APPROPRIATE BOX AND WRITE IN USING LEADING ZEROES

- Weekly ☐
- Monthly ☐
- Quarterly ☐
- Annually (if volunteered) ☐
- Don't know ☐

£ ☐☐☐☐

Q39. ASK IF DUAL FUEL OR DON'T KNOW AT Q36. OTHERS GO TO Q40

What is the minimum total amount of saving you would need to be offered in order to make you willing to switch gas and electricity supplier in the near future? Please answer in pounds, weekly, monthly, quarterly on average or annually. MARK APPROPRIATE BOX AND WRITE IN USING LEADING ZEROES

- Weekly ☐
- Monthly ☐
- Quarterly ☐
- Annually (if volunteered) ☐
- Don't know ☐

£ ☐☐☐☐

ASK ALL

Q40. SHOWCARD K (R) **Using the words on this card, can you tell me to what extent you agree or disagree with these statements on switching domestic energy suppliers?** READ OUT a-u ROTATE ORDER AND TICK START. SINGLE CODE ONLY FOR EACH

			Strongly agree	Tend to agree	Neither agree nor dis-agree	Tend to disagree	Strongly disagree	Don't know
☐	a	**I feel reasonably confident that I know enough about how to switch suppliers......**	☐	☐	☐	☐	☐	☐
	b	**Some energy suppliers are more trustworthy and reliable than others..........**	☐	☐	☐	☐	☐	☐
	c	**There are no real differences between suppliers in the prices they charge...........**	☐	☐	☐	☐	☐	☐
	d	**Switching is pointless because all suppliers increase their prices at the same time..**	☐	☐	☐	☐	☐	☐
	e	**It pays to stay loyal to a particular supplier ....**	☐	☐	☐	☐	☐	☐
☐	f	**I worry that if I switch things will go wrong...**	☐	☐	☐	☐	☐	☐
	g	**Suppliers try and do the best for their customers ....**	☐	☐	☐	☐	☐	☐
	h	**Switching energy supplier is a good way to save money…**	☐	☐	☐	☐	☐	☐
	i	**If I am in debt with my current supplier I cannot switch..**	☐	☐	☐	☐	☐	☐
	j	**The number of different tariffs is too confusing ....**	☐	☐	☐	☐	☐	☐
☐	k	**You can't believe what gas and electricity salespeople tell you ....**	☐	☐	☐	☐	☐	☐
	l	**Switching is not relevant to me because of my housing circumstances....................**	☐	☐	☐	☐	☐	☐
	m	**The savings you can make from switching supplier are not worth the hassle ....**	☐	☐	☐	☐	☐	☐
	n	**I like my current supplier because they have given me a high standard of service ....**	☐	☐	☐	☐	☐	☐
	o	**The savings will only last for a short time so I don't think it is worth switching..**	☐	☐	☐	☐	☐	☐
☐	p	**I have no time to think about switching.....**	☐	☐	☐	☐	☐	☐
	q	**I worry the service may be worse if I switch ....**	☐	☐	☐	☐	☐	☐

CONTINUE OVERLEAF

		Strongly agree	Tend to agree	Neither agree nor dis-agree	Tend to disagree	Strongly disagree	Don't know
r	**I'm happy with my supplier, and I see no need to switch...**	☐	☐	☐	☐	☐	☐
s	**It's too hard to work out whether I would save or not if I switched..............................**	☐	☐	☐	☐	☐	☐
t	**If I have a boiler maintenance contract with my supplier I cannot switch ....**	☐	☐	☐	☐	☐	☐
☐ u	**I check now and again to see if it is worth me switching ....**	☐	☐	☐	☐	☐	☐

Q41. SHOWCARD K (R) AGAIN **And now I want to read out some statements about your more general attitudes. Again using the words on this card, can you tell me the extent to which you agree or disagree?** READ OUT a-j. ROTATE ORDER AND TICK START. SINGLE CODE ONLY FOR EACH

		Strongly agree	Tend to agree	Neither agree nor dis-agree	Tend to disagree	Strongly disagree	Don't know
☐ a	**Financially, things are a bit of a struggle for me ....**	☐	☐	☐	☐	☐	☐
b	**I always like to look for ways I can save some money, even if it is only a little..............................**	☐	☐	☐	☐	☐	☐
c	**I have a fair bit of spare time........**	☐	☐	☐	☐	☐	☐
d	**I don't like dealing with call centres..**	☐	☐	☐	☐	☐	☐
e	**I always feel some worry or anxiety when things I am used to start to change ....**	☐	☐	☐	☐	☐	☐
☐ f	**I always find out everything I can about a product before I decide to buy it ....**	☐	☐	☐	☐	☐	☐
g	**I prefer to talk to a salesperson before I buy things ....**	☐	☐	☐	☐	☐	☐
h	**I often make decisions on an impulse...**	☐	☐	☐	☐	☐	☐
i	**Everything seems to be getting more complicated nowadays ....**	☐	☐	☐	☐	☐	☐
j	**I think about the effects on the environment of my purchasing decisions.......................................**	☐	☐	☐	☐	☐	☐

Q42. **Do you or anyone else responsible for the gas or electricity bills in your household have a current account with a bank?** SINGLE CODE ONLY

Yes.. ☐

No .... ☐

Q43. **Are you currently in debt to a gas or electricity supplier?** SINGLE CODE ONLY

Yes.. ☐

No .... ☐

Don't know .... ☐

Q44. **Do you have a boiler or heating maintenance contract with your gas or electricity supplier?** SINGLE CODE ONLY

Yes.. ☐

No .... ☐

Don't know .... ☐

THIS MUST BE THE LAST PAGE OF THE QUESTIONNAIRE AND MUST BE SINGLE SIDED

Ipsos MORI/33592bb01 Questionnaire

Ofgem Customer Engagement Survey 2008 Mainstage Final
12th June 2008

Sampling Point number

Interviewer

Name/Initial/Title: Mr/Mrs/Ms/Miss

Address:

Full Postcode

QTEL1 **Do you have a fixed line telephone at home which you use for incoming and outgoing <u>voice</u> calls?**

Yes ☐

WRITE IN Full tel. No

No ☐

Refused ☐ GO TO QTEL2

Ex-directory ☐

ASK IF NO FIXED LINE/REFUSED/EX-DIRECTORY (AT QTEL1). OTHERS CLOSE

QTEL2 **Can I just check, do you have a mobile phone?** IF YES ASK: **Can I take the number please?**

Yes ☐

WRITE IN Full tel. No

No ☐

Refused ☐

IT IS VERY IMPORTANT THAT YOU FILL IN THE SAMPLE POINT NUMBER, QUESTIONNAIRE NUMBER AND INTERVIEWER NUMBER ON BOTH THE FRONT AND BACK PAGE OF THE QUESTIONNAIRE.

Ipsos MORI