Ipsos MORI
Reputation Centre

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Customer Engagement with the Energy Market: Tracking Survey 2015

Report prepared for Ofgem

Contents

1 Summary

1.1 Preface

Ofgem commissioned Ipsos MORI to conduct a face-to-face survey representative of the population of Great Britain aged 15+. The objective of the research was to provide an up-to-date understanding of consumer engagement with the GB energy market, including switching rates, engagement with bills and other communications, and trust in energy suppliers. Where possible, this report includes year-on-year comparisons with the previous surveys in March 2014, March 2013, March 2012 and January 2011, though there are some questionnaire changes during that period. There have been no substantive questionnaire changes since 2013[1] or 2014.[2]

The research vehicle chosen was Ipsos MORI's weekly omnibus survey, known as the Capibus, for which the fieldwork dates were 6th -22nd March 2015, achieving 2,004 personal interviews. All interviews are carried out in-home using computer-assisted personal interviewing (CAPI).

It should be noted that the DECC Power to switch campaign ran in the period 19 February - 27 March 2015, overlapping with the fieldwork.

The survey is highly robust for national level samples (e.g.all gas customers), however care is needed when drawing conclusions about small sub-groups as there is more likely to be volatility in the figures when comparing year-on-year change.

The main findings of the survey are as follows:

1.2 Switching supplier

- There is no significant change this year in the incidence of switching either gas or electricity supplier. Twelve percent of gas customers (down one point) and 13% of electricity customers switched their supplier in 2014.

- The switching rate among pre-payment meter (PPM) customers has increased to parity with that of direct debit customers, for both gas and electricity. However switching among those on standard credit has declined to a very low level (3% for both fuels). Some of the lower levels of switching are also seen among those who never use the internet, those in mobile-only households (i.e. those who do not have a landline) and, as previously, those aged 65 or over.

- There have been some changes in the pattern of switching by home tenure and ethnicity. Growth in switching among the rented sector has brought it up to parity with those in the non-rented sector. On the other hand, the higher levels of switching among Black and Minority Ethnic (BME) groups noted last year is no longer apparent, and incidence of switching by BME groups has fallen behind that of white ethnic groups.

[1] Except for additional explanation of fixed term tariffs at Question 7
[2] Except additions to the electricity and gas supplier lists

- Those with a long term physical or mental impairment are less likely than those without such an impairment to have switched either fuel this year, a re-establishment of the pattern last seen in 2013.

- The proportion who say they have ever switched their gas supplier is up just one percentage point this year (to 43%) while for electricity customers the proportion "ever switched" remains at 39%. While this represents no statistically significant change overall, it is, for gas customers at least, a continuation of the upward trend of the last three years. Those who have never switched gas or electricity supplier are more likely to be found among those on standard credit, 15-34 year olds, those with "financial problems"[3], those from social groups DE or from BME groups, those who rent their homes, never use the internet or have only a mobile phone.

1.3 Switching tariff or method of payment

- Tariff and payment switching is down a marginal two points for both fuels (to 13% for gas and 11% for electricity). For electricity this is a continuation of a downward trend since 2013.

- Switching of tariff or payment method (without switching supplier) is most prevalent among those on direct debit, aged 35 or over, those who are keeping up with their household bills, those in social grades AB, in non-rented accommodation, with a landline and (notably this year) those with a long term physical or mental impairment.

- Saving money remains the chief trigger for tariff or payment method change.

- Price comparison websites continue to be principal method of finding out about tariffs and payment methods, but customers are still most likely to have phoned their supplier to make the actual change – marginally fewer are using price comparison sites for this purpose.

1.4 Awareness and perceptions of switching supplier, tariff or payment method

- Among those who have never switched supplier, awareness that it is possible to do so is virtually unchanged at 83%. The proportion still unaware is not significantly changed, and comprises 10% of all domestic energy consumers.[4] Those unaware comprise disproportionately people who pay by quarterly direct debit or PPM, those who are falling behind with their bills or having financial problems, those in social grade D, from BME groups, who live in rented accommodation and who have children under 5.

- Being *happy with current supplier* remains the main reason for not switching supplier, but mentions of this are down six percentage points this year to just 50%, the lowest ever recorded. The upward trend in mentions that *switching is a hassle* has been arrested this year; figures are

[3] Self defined at Q38; those who say of their financial situation that it is: "a constant struggle", that they are "falling behind with bills" or that they have "real financial problems"
[4] All energy consumers: comprises those surveyed with mains electricity or gas who are responsible (solely or jointly) for paying household gas or electricity bills

unchanged from 2014 at 30%. Similarly, the proportion who cite there being no difference between suppliers has not increased this year after two previous years of growth.

- The median saving required by those who have never switched supplier in order for them to consider switching is £99, unchanged from 2014.

- Awareness that it is possible to change tariff or payment method with the current supplier is consistent again this year at 81% of those who did not change either in 2014/15. Within this figure, the proportion who know it is possible to change both tariff and payment method has increased two years running and now stands at 59%.

1.5 Experience of switching supplier

- The belief that a new supplier will be cheaper remains the primary trigger for switching both fuels. Moving home continues to be the most important secondary trigger, but the attraction of moving to fixed price deals has waned somewhat.

- Price comparison websites continue to dominate the methods of finding out about the best deals, and the influence of doorstep representatives is still falling. The use of collective switching schemes stands at 1% of gas switchers and 2% of electricity switchers, unchanged from last year.

- Price comparison websites have slipped back somewhat as the main method of making the switch (down four points to 27% for gas), in favour of phoning the supplier itself (up two points to 29% for gas), though for electricity switchers they are now equally frequently mentioned.

- On the last occasion of switching those that had done so expected to save a median amount of £144, somewhat more than the £111 of 2014. Notably fewer than last year gave a “don’t know” response to this question (down eight points to 29%).

- Evaluations of the switching experience points to several notable improvements. Switchers are more likely to feel they are now paying less than previously, for both fuels, though with greater improvements in the case of gas. They are also more likely to agree they found it easy to decide which deal to switch to (especially in gas). They are marginally more likely to be confident they fully understand the key features of their chosen deal. They are also more confident they would make the right choice for them if they switched again (especially gas switchers).

1.6 Attitudes to tariff choices available

- Improvements in customers’ evaluation of the perceived difficulty in comparing tariffs are less dramatic this year but still positive: the proportion rating it as easy is up two points to 44%. Those 30% who find it difficult gave general mentions of confusing tariffs as the main reason, as last year, but were less likely to mention it being hard to compare like with like, and less likely to say (spontaneously) there are too many tariffs.

- When asked specifically about the number of tariffs perceived, the proportion saying there are too many is down five points to 57%, while the proportion saying there is the right number continues to rise slowly (up two points to 23%).

1.7 Information and communication from suppliers

- There has been a significant five-point rise in the proportion of consumers who remember receiving information on their forecast energy consumption, though no improvement in the proportion who have been told the name of their tariff by their supplier.
- Just 39% have received supplier information on changes to their tariff (down four points) but this may simply reflect fewer changes to tariffs this year.
- There have been marginal increases in the proportions who recall receiving annual statements and end of fixed term letters in the past year. Slightly fewer recall receiving bills or statements of account, taking the proportion back to 80%, the same as in 2013. Considerably fewer recall receiving price increase notification letters in the past year (just 43% of those not on fixed term contracts) but this may simply reflect falling prices across the industry.
- As last year, end of fixed term letters[5] give rise to the most detailed reading behaviour; they are also slightly more likely than other communications to be understood (though levels of understanding are high for all). Also as last year, the end of fixed term letter is the most effective call to action – both in terms of considering energy options and looking into, or actually switching supplier, tariff or payment method.

1.8 Trust in energy suppliers

- Although distrust of energy suppliers to be open and transparent in dealing with customers still outweighs trust, the gap has narrowed substantially – trust is up seven percentage points and distrust is down seven points.
- As previously, more vulnerable sub-groups are more likely to trust the industry, for example, those paying by standard credit, aged 65+ or who never use the internet. On the other hand, some of the most dramatic improvement in trust has been among the professional and managerial AB social grade – up 11 points to 34% (though still outweighed by 39% distrust).

[5] Ofgem data from January 2015 suggests that approximately 40% of customers are on fixed term tariffs, suggesting that, at 57%, this survey overestimates the proportion.

2 Introduction and Methodology

2.1 Selection of respondents

In the *Capibus* omnibus survey we use up to 210 sampling points selected every week (i.e. one point per week per political constituency), employ ACORN[6] to improve how representative the sample is across the social grades and set quota controls specific to each interviewer location. By using this proven sample design, we represent all sub-sectors of the population – at a national and regional level.

2.2 Quality control

We employ the strictest quality control procedures. Our interviewers are trained to a recognised standard and one-in-ten interviews are back-checked by telephone. Furthermore, we use the CAPI software to monitor both the overall length of each interview (the average length of the full interview, including the Ofgem section is approximately 26 minutes) and the time taken over individual questions in the questionnaire.

2.3 Data processing

All *Capibus* data is processed in-house by Ipsos MORI.

2.4 Weighting and technical notes

Capibus uses a 'rim weighting' system which weights to the latest set of mid-year census estimates and NRS (National Readership Survey) defined profiles for age, social grade, region and working status interlocked with gender and additional profiles on tenure and ethnicity. The idea of rim weighting is to provide the 'best weighting', or least distorting, by using computing power to run a large number of solutions from which the best is chosen.

In order to correct minor deviations in terms of the generated sample profile week on week, omnibus services use a variety of weighting procedures. Clearly, the more effective the sampling the less the need to rely on weighting to resolve problems.

While the nationally representative sample comprised 2,004 interviews, most of the figures in this report are based on 1,310 gas customers and 1,493 electricity customers. This reflects the fact that we excluded from detailed questioning those people who either did not have mains gas or electricity or who were not responsible (individually or jointly) for paying gas or electricity bills.

NOTE: Figures in the tables will not always add to 100%, either because of multiple answers being allowed, or because of rounding. This may particularly affect rating scales where the "net" of, for example, "very" and "fairly" will not add exactly to the combined "very/fairly" figure. The difference should not, however, be more than one percentage point.

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[6] A Classification Of Residential Neighbourhoods: is a geodemographic segmentation of the UK's population. It segments households, postcodes and neighbourhoods into 6 categories, 18 groups and 62 types. By analysing significant social factors and population behaviour, it provides precise information and an in-depth understanding of the different types of people

Tables are headed by actual question wordings and a question number, which relates to the full questionnaire in the appendix to this report.

There is no substantive change in the questionnaire since 2014, though this year sees analysis by some new variables: presence of children, presence of children in social grade DE households and the availability of a landline in the household. All of these were mooted to be indicators of degrees of vulnerability in a household, and these are added to the data tables over and above existing measures of vulnerability e.g. age, disability, internet access etc. Please note that Ofgem uses a number of indicators of vulnerability, all of which may partially overlap. The commentary frequently lists these criteria and how they relate to the way each question is asked, but because of overlaps this commentary can become somewhat repetitive. For example, there may be a very similar pattern of answers among social grade DE, those who rent their homes and those who have a mobile phone only. The definitions overlap, but they are not exactly the same group of people.

Any findings referred to which are not shown in the tables are all available in the original copy of the computer tabulations published by Ofgem.

2.5 Sampling tolerances and interpretation

The survey is highly robust for national level samples (e.g. all gas customers), however great care is needed when drawing conclusions about small sub-groups where there are small sub-samples (especially those under 200) as this may sometimes lead to volatility in the figures when comparing year-on-year change. Statistically significant change is highlighted in the report, but occasionally smaller changes are also hinted at, with appropriate caveats, where they seem to signal a developing trend. While somewhat subjective, this is intended to help predict trends that may only become statistically significant when viewed over 3, 4 or 5 years.

The table below provides examples of the margins of error that apply to the percentage results in this report. It shows the possible variation that might be anticipated because a sample, rather than the entire population, was interviewed, at a 95% confidence level.

For example, on a question where 50% of the people in a sample of 1,310 respond with a particular answer, the chances are 95 in 100 that this result would not vary more than 2.7 percentage points, plus or minus, from a complete coverage of the entire population using the same procedures. However, it is not true to conclude that the "actual" result (95 times out of 100) lies anywhere between 47.3% and 52.7% - but it is proportionately more likely to be closer to the centre of this band (i.e. be 50%) than to lie at the extreme of this band.

For smaller sub-groups the band is wider: for example on a question where 50% of 153 BME electricity customers respond with a particular answer the chances are 95 in 100 that the result would not vary more than 7.9 percentage points from a complete coverage of the entire population of this description.

As indicated in the table below, the sampling tolerances vary with the size of the sample or sub-sample and the size of the percentage results. Some example sub-groups are shown, but figures would be similar for others of similar size.

Table 1: Margins of error

	Approximate margins of error applicable to percentage results in the survey at or near these levels		
Size of sample/sub-sample (unweighted)	*10% or 90%* ±	30% or 70% ±	50% ±
1,310 (all gas customers)	1.6	2.5	2.7
1,493 (all electricity customers)	1.5	2.3	2.5
Electricity DD (1,037)	1.8	2.8	3.0
Electricity PPM (259)	3.7	5.6	6.1
Electricity Standard Credit (138)	5.0	7.6	8.3
BME among electricity customers (153)	4.8	7.3	7.9

Tolerances are also involved in the comparison of results from different parts of the sample or between different years. A difference, in other words, must be of at least a certain minimum size to be considered statistically significant. The table below is a guide to the sampling tolerances applicable to comparisons:

Table 2: Differences required for statistical significance

	Differences required for significance at or near these percentage levels		
Size of sample/sub-sample (unweighted) being compared	*10% or 90%* ±	30% or 70% ±	50% ±
1,310 vs 1,227 (gas customers 2015 vs 2014)	2.3	3.6	3.9
1,493 vs 1,383 (electricity customers 2015 vs 2014)	2.2	3.4	3.7

1,037 vs 962 (Electricity DD 2015 vs 2014)	2.6	4.0	4.4
259 vs 223 (Electricity PPM 2015 vs 2014)	5.4	8.2	9.0
138 vs 138 9Electricity Standard Credit 2015 vs 2014)	7.1	10.9	11.8
153 vs 126 (BME among electricity customers (2015 vs 2014)	7.1	10.8	11.8

For example, the difference between two percentage results of, say, 30% and 35% would almost certainly be a statistically significant difference when comparing all gas customers 2014-2015. However, when these results (a five-point increase) occur based on samples of 126 and 153 BME interviews respectively, the difference would almost certainly not be statistically significant.

The sample tolerances given above relate to simple random samples where each member of the population has an equal chance of selection. In practice, the accuracy of carefully selected and controlled quota samples has been found to be as least as good as random samples , given the issues with random response rates that can be achieved in practice. Quota samples are, strictly speaking, subject to design factors[7], but these can be complex to calculate. The design factor will vary not only according to sub-group, but also by each question, and the way in which it is asked, so it is not practical to calculate the hundreds of different design factors which would be applicable.

Ref: 14-087906

[7] The design factor or design effect (deff) quantifies the extent to which the expected sampling error in a survey departs from the sampling error that could be expected under simple random sampling.

3 Incidence of switching

3.1 Switched supplier in last year

Q12a. Did you switch your gas supplier in 2014?

	All 2015	Payment method			Ethnicity		Tenure		Previous survey years (all)		
		Monthly/ Quarterly Direct debit	Standard credit	PPM (gas)	White	BME	Rented[8]	Not rented	2012	2013	2014
Base: All with mains gas who are responsible for the bill	*(1310)* %	*(915)* %	*(131)* %	*(209)* %	*(1160)* %	*(146)* %	*(386)* %	*(924)* %	*(1232)* %	*(1214)* %	*(1227)* %
Yes	**12**	13	3	13	12	7	13	12	13	11	13
No/ Don't know	**88**	87	97	87	88	93	87	88	87	89	87

Source: Ipsos MORI

Q16a. Did you switch your electricity supplier in 2014?

	All 2015	Payment method			Ethnicity		Tenure		Previous survey years (all)		
		Monthly/ Quarterly Direct debit	Standard credit	PPM (elec)	White	BME	Rented	Not rented	2012	2013	2014
Base: All with mains electricity who are responsible for the bill	*(1493)* %	*(1037)* %	*(138)* %	*(259)* %	*(1336)* %	*(153)* %	*(455)* %	*(1038)* %	*(1461)* %	*(1408)* %	*(1383)* %
Yes	**13**	15	3	15	14	9	14	13	14	12	13
No/ Don't know	**87**	85	97	85	86	91	86	87	86	88	87

Source: Ipsos MORI

[8] The analysis combines private and social renting, as in previous reports

The proportion of gas customers who have switched their supplier in 2014 is 12% while the proportion of electricity customers who have switched is 13%. Neither of these figures is significantly different to last year.

There are signs of decline in switching rates among standard credit customers (now down to 3% for both fuels from 7% last year for gas and 8% for electricity, though neither are statistically significant) while marginal increases among PPM customers (significant for electricity PPMs but not for gas) have brought them up to parity with direct debit customers, among whom the incidence of switching is substantially unchanged

The incidence of switching for both fuels is now lower among those from BME groups in comparison to the white ethnic group. The reverse was true last year, and this marks a return to the pattern of 2013. There has been a notable decline in the incidence of switching amongst BME customers for both gas and electricity, though only the decrease in switching gas supplier is statistically significant; this has dropped from 15% who say they switched their gas supplier in 2013 to 7% in 2014.

Those in rented accommodation are statistically as likely to have switched suppliers for both fuels this year as those who are not. This is a result of further marginal increases among those who rent and declines among those who do not. While none of the changes are individually significant, taken together they represent a departure from the previously observed (2012/13) pattern of less switching in the rented sector.

Only 8% of the 65+ age group say they have switched their gas supplier in 2014 while 10% say they have switched their electricity supplier. Both of these figures lie below the national aggregate, and significantly so for gas customers. This is s similar pattern to that observed last year.

This year (and unlike last year), there is a significant difference in the incidence of switching both fuels between those with a long term physical or mental impairment and those without. Those with such an impairment are notably less likely to have switched; there is a five-point difference in gas switching rates (8%, compared to 13% without such an impairment), and electricity switching rates (9% compared to 14%). The comparable figures for 2014 only showed a one-point difference between those with and without an impairment, for both fuels.

Those who never use the internet are significantly less likely than those who do to have switched their gas supplier in 2014 (6%, compared to 13%). The same is true for those switching their electricity supplier; 5% of those who never use the internet say they have switched in 2014 while among internet users the proportion is 15%.

The difference in the incidence of switching gas supplier amongst those who have a landline (12%) and those with a mobile phone only (8%) is statistically significant. A similar pattern is apparent for switching electricity supplier (14% of those who own a landline say they have switched while only 10% of those with a mobile only have done so) though this is not a significant difference.

Those customers with children under the age of 5 are significantly more likely to have switched their gas supplier in 2014 (19%) than those without (11%). For electricity customers, a similar pattern is evident though the four-point difference is not statistically significant.

3.2 Ever switched supplier

Q12a/12b/13. Summary Table – Ever switched gas supplier (to March 2015)[9]

	All 2015	Payment method			Social grade		Ethnicity		Tenure		Previous survey years (all)		
		Monthly/ Quarterly Direct debit	Standard credit	PPM (gas)	AB	DE	White	BME	Rented	Not rented	2012	2013	2014
Base: All with mains gas who are responsible for the bill	*(1310) %*	*(915) %*	*(131) %*	*(209) %*	*(298) %*	*(345) %*	*(1160) %*	*(146) %*	*(386) %*	*(924) %*	*(1,232) %*	*(1,214) %*	*(1,227) %*
Yes	43	48	27	34	57	31	44	25	33	46	37	38	42
No/DK	57	52	73	66	43	69	56	75	67	54	63	62	58

Source: Ipsos MORI

Q16a/16b/17. Summary Table – Ever switched electricity supplier (to March 2015)

	All 2015	Payment method			Social grade		Ethnicity		Tenure		Previous survey years (all)		
		Monthly/ Quarterly Direct debit	Standard credit	PPM (elec)	AB	DE	White	BME	Rented	Not rented	2012	2013	2014
Base: All with mains electricity who are responsible for the bill	*(1493) %*	*(1037) %*	*(138) %*	*(259) %*	*(337) %*	*(393) %*	*(1336) %*	*(153) %*	*(455) %*	*(1038) %*	*(1,461) %*	*(1,408) %*	*(1,383) %*
Yes	39	44	24	33	55	30	41	24	31	43	35	38	39
No/DK	61	56	76	67	45	70	59	76	69	57	65	62	61

Source: Ipsos MORI

The proportion who have ever switched their gas supplier continues an upwards trend, though this year's one-point increase is not significantly different to last year; it is up one percentage point (to 43%). For electricity customers, however, the trend has levelled out and the proportion ever switched is stable at 39%.

The proportion of those switchers for either fuel who have switched *four times or more* has fallen this year compared to last, by five percentage points amongst gas switchers (from 20% to 15%) and by six percentage points amongst electricity switchers (from 22% to 16%). Simultaneously, the proportion of

[9] Question wording for "ever switched" is "Did you switch your electricity/gas supplier at any time before 2014?"combined with the groups who have switched in 2014, or so far in 2015

first time switchers has grown from 37% to 45% amongst gas switchers and from 35% to 43% amongst electricity customers.

Those who have **never** switched gas or electricity supplier are most likely to fall into the following categories: pay by standard credit, aged 15-34, have financial problems[10], be from social grades DE or from BME groups, never use the internet, live in rented accommodation and have a mobile phone only.

In contrast, the proportion who have ever switched gas or electricity supplier tend to better fit the following profile: pay by direct debit, aged 35 or over, keep up with bills without any difficulties, fall into social grade AB, are from the white ethnic group, live in rural areas, use the internet, live in non-rented accommodation, and are on a fixed term contract.

3.3 Switching tariffs or payment method

Q15a. Even though you stayed with the same gas supplier in 2014 and so far in 2015, did you change the tariff you have with them or the method by which you pay them?

	All 2015	Current Payment method			Social grade		Age			Tenure		Previous survey years (all)	
		Monthly/ Quarterly Direct debit	Standard credit	PPM (gas)	AB	DE	15-34	35-64	65+	Rented	Not rented	2013	2014
Base: All who did not switch gas supplier in 2014/15	*(1103) %*	*(757) %*	*(123) %*	*(174) %*	*(234) %*	*(298) %*	*(208) %*	*(580) %*	*(315) %*	*(321) %*	*(782) %*	*(1,063) %*	*(1,043) %*
Yes – tariff	11	13	4	4	17	5	7	11	13	8	12	11	12
Yes – payment method	3	3	2	4	3	4	4	2	3	3	3	5	4
Yes - changed either	13	16	6	6	19	8	10	13	15	9	14	15	15
No/Don't know	87	84	94	94	81	92	90	87	85	91	86	85	85

Source: Ipsos MORI

[10] Self defined at Q38; those who say of their financial situation that it is: "a constant struggle", that they are "falling behind with bills" or that they have "real financial problems"

Q19a. Even though you stayed with the same electricity supplier in 2014 and so far in 2015, did you change the tariff you have with them or the method by which you pay them?

	All 2015	Current Payment method			Social grade		Age			Tenure		Previous survey years (all)	
		Monthly/ Quarterly Direct debit	Standard credit	PPM (elec)	AB	DE	15-34	35-64	65+	Rent ed	Not rented	2013	2014
Base: All who did not switch electricity supplier in 2014/15	*(1254) %*	*(855) %*	*(131) %*	*(214) %*	*(258) %*	*(340) %*	*(246) %*	*(640) %*	*(368) %*	*(380) %*	*(874) %*	*(1234) %*	*(1,171) %*
Yes – tariff	**9**	12	3	5	14	4	5	11	9	5	11	10	10
Yes – payment method	**3**	2	3	4	2	3	3	3	2	3	3	6	3
Yes – changed either	**11**	13	6	8	16	7	8	13	11	7	13	15	13
No/Don't know	**89**	87	94	92	84	93	92	87	89	93	87	85	87

Source: Ipsos MORI

Tariff and payment method switching has fallen by two points for both gas and electricity. As has previously and consistently been the case, energy customers who have not changed their suppliers remain more likely to have changed their tariffs than their payment methods. Tariff switching in both gas and electricity has, however, declined this year by one point for each, following a steady though marginal increase for gas customers in previous years and a period of stability for electricity customers over the same period.

This year, 11% of gas customers and 9% of electricity customers who did not switch their supplier in 2014/15 switched their tariff.

Those customers most likely to have switched tariff or payment method in 2014/15 are those on monthly/quarterly direct debit, those aged 35 and above, those who are keeping up with their bills, those who are social grade AB, those in non-rented accommodation, and (notably this year) those with a physical or mental impairment. Among gas customers this last group is significantly more likely to have switched tariff or payment method than those without an impairment (18% compared to 12%).

After a decline last year in those who switched their payment method at the same time as their supplier among customers for both fuels, the figure has recovered among those switching their gas supplier and remained stable among those switching electricity supplier. The proportion of recent gas supplier switchers who also changed their payment method at the same time is 13% (up from 9%) and the corresponding figure for electricity supplier switchers is 12% (as last year).

Q33. Thinking about the last time you changed your tariff or payment method (without switching supplier) what was the main trigger causing you to change it?

	All 2015	Previous surveys (all)	
		2013	2014
Base: All changed tariff/payment method in 2014/15	*(188)* %	*(219)* %	*(202)* %
Believed new tariff or method was cheaper/ to save money	55	58	58
Moved home	8	7	9
Wanted a fixed price deal	8	8	6
Contract/ fixed rate ended	5	-	5
Wanted a dual fuel package	3	4	4
Believed new tariff or method offered better benefits	2	6	2
Wanted an online tariff	*	1	2

Source: Ipsos MORI

The top reason cited for changing tariff or payment method without switching supplier remains the respondents' belief they would save money by doing so. This reason is cited significantly more often than all others, which include switching to new tariffs for other benefits, switching to or from fixed price tariffs, or switching to a dual fuel tariff. Some changes to payment method are triggered by moving home.

Q34. How did you find out about the tariff or payment method you changed to?

	All	Previous Surveys All	
		2013	2014
Base: All changed tariff or payment method in 2014/15	*(188)* *%*	*(219)* *%*	*(202)* *%*
Used online/ website price comparison service	24	24	28
Written communication or marketing material	12	7	13
I rang them (only)	8	17	8
Looked at supplier's own website only	9	4	7
They phoned me	6	8	6
Supplier representative knocked at my door	5	8	6
Phoned a comparison service	8	4	6
Rang them and other suppliers	5	5	5
Looked at websites of more than one supplier	3	2	5
Friend or family member told me	4	4	3
I saw an advert	2	4	3
Spoke to a salesperson in street/ shopping centre	4	3	3
Other	13	8	10
Don't know	1	5	3

Source: Ipsos MORI

The most common method for finding out about tariffs or payment methods amongst energy customers continues to be the price comparison website. A quarter (24%) of customers who changed tariff or payment method in 2014/15 found out this way though there has been a marginal four-point decline since last year.

Looking at suppliers' own websites and phoning a comparison service are two sources of information which have increased in popularity year-on-year since 2013. Looking at the websites of more than one supplier has declined by a marginal two points this year (from 5% to 3%) and this represents the largest decline of all information sources measured, except using price comparison websites (which is down four points). Seeing adverts has shown a one-point decline for the third year running.

Q35. Thinking about the last time you changed your tariff or payment method with your supplier, how did you change it?

	All 2015	Previous surveys (all)	
		2013	2014
Base: All changed tariff or payment method in 2014/15	*(188)* *%*	*(219)* *%*	*(202)* *%*
Phoning supplier	38	42	38
Online price comparison service	17	20	21
Through suppliers' website	13	4	8
Through a salesperson who knocked at my door	6	10	8
Telephone price comparison service	6	5	6
Written communications	3	4	7
Through a salesperson in street/shopping centre	2	3	2
Other	13	7	7
Don't know	2	4	4

Source: Ipsos MORI

Phoning the supplier remains the most frequently cited method of changing tariffs or payment methods amongst energy customers; it is stable from last year at 38%. After marginal increases year on year for the past three years, the proportion using an online price comparison service to change tariff or payment method has declined this year by four percentage points to 17% (though this is not quite statistically significant). Written communications are another means for changing tariff or payment method which are declining in frequency of use; customers report using these less this year (though again, only marginally) and these now only account for 3% of tariff or payment method switchers.

4 Knowledge and preconceptions about switching

Q21. Did you know it was possible to switch to a different gas or electricity supplier?

	Total	Payment method (gas)			Social grade			Ethnicity		Previous surveys (all)		
	2015	Monthly/quarterly DD	Quarterly DD	PPM	AB	C2	DE	*White*	BME	2012	2013	2014
Base: All responsible for bills who have never switched gas or electricity supplier	*(875) %*	*(473) %*	*(66) %*	*(134) %*	*(151) %*	*(186) %*	*(271) %*	*(762) %*	*(112) %*	*(934) %*	*(882) %*	*(819) %*
Yes to both	**76**	80	65	63	84	73	68	78	56	79	77	78
Yes – Electricity not gas	2	*	2	-	3	1	2	2	3	2	2	2
Yes – Gas not electricity	5	4	1	9	5	6	5	5	7	1	5	3
Yes (to either elec or gas)	**83**	84	68	71	92	80	75	85	66	80	84	84
No	**17**	15	31	28	8	20	24	15	33	16	16	15
Don't know	*	*	1	1	*	-	*	*	1	3	1	1

Source: Ipsos MORI

Awareness amongst those who have never switched gas/electricity supplier that it is possible to switch supplier is broadly stable at 83% this year. Following trends from previous surveys, only very small proportions of energy customers think it is possible to switch supplier for one fuel and not the other. The percentage of those who are unaware that it is possible to switch to a different gas or electricity supplier among those who have never switched is 17%; this is up marginally (by two points) since last year. This group is composed disproportionately of people who pay for their fuels by quarterly direct debit or PPM, who are falling behind with some bills or having real financial problems, those who are in social grade D, who live in rented accommodation ,who have children under 5 and who are from BME groups. The last of these is particularly notable: 33% of those from BME groups are unaware, significantly more than among white ethnic groups.

Q20. Did you know it was possible to change to a different tariff or method of payment with your current supplier?

	Total 2015	Method of Payment (electricity)		Social Grade		Ethnicity		Tenure		Previous survey (all)	
		Quarterly Direct Debit	*PPM (elec)*	C2	DE	White	BME	Rented	Not rented	2013	2014
Base: All who have not changed gas or electricity tariff/payment method in 2014/15	*(1310) %*	*(114) %*	*(237) %*	*(250) %*	*(365) %*	*(1169) %*	*(137) %*	*(416) %*	*(894) %*	*(1241) %*	*(1191) %*
Yes – knew possible to change tariff (only)	**18**	19	13	19	18	18	21	14	20	34	23
Yes – knew possible to change method of payment (only)	**4**	6	5	2	5	3	5	6	3	5	5
Yes – knew possible to change both	**59**	49	49	56	48	61	37	54	61	43	53
No	**19**	26	32	22	29	17	37	26	15	17	18
Don't know	**1**	-	*	2	*	1	-	1	1	1	1
All who knew possible to switch either tariff or payment method for either fuel	**81**	74	68	76	71	82	63	73	84	82	81

Source: Ipsos MORI

For the third year running, awareness that it is possible to change *either* tariff or payment method is high and unchanged at 81% of those who have not changed gas/electricity tariff or payment method. However the proportion of those customers who say they knew it was possible to change *both* tariff and payment method has increased significantly again this year (following a 10-point increase between 2013 and 2014), to six in ten (59%).

A minority, 19%, of those who have not switched tariff or payment method in the past year are still unaware of the possibility to do so and this figure has been increasingly marginally (by just one point per year) since 2012. Those who fall into this category tend to be of the following characteristics: pay for their energy by quarterly direct debit or PPM, aged 15-34, fall behind with their bills or have real financial problems, social grade DE, from BME groups, never use the internet, live in rented accommodation, have a mobile phone only and have children under 5.

Q22. For each of the items here, could you please say which of them, if any, apply to you?											
	Total 2015	Age			Social grade		Tenure		Previous surveys (all)		
		15-34	35-64	65+	AB	E	Rented	Not rented	2012	2013	2014
Base: All responsible for bills but have never switched gas or electricity supplier	*(875) %*	*(203) %*	*(413) %*	*(259) %*	*(151) %*	*(128) %*	*(307) %*	*(568) %*	*(934) %*	*(882) %*	*(819) %*
I'm happy with my current supplier(s)	50	49	50	52	53	55	46	53	78	55	56
Switching is a hassle	30	30	25	37	29	32	32	28	20	27	30
I don't think there's any difference between suppliers to make switching worthwhile[11]	20	18	20	22	17	28	20	20	13	17	21
I've checked prices of other suppliers and I think I'm on the best deal[12]	10	8	12	9	8	14	9	11	9	12	11
I am unsure where to get info to help me make a good choice	5	5	5	5	4	8	6	5	2	6	4
I wouldn't know how to switch even if I wanted to	5	4	4	7	5	12	3	6	3	4	3
I live in rented accommodation and I don't think my landlord would allow me to switch[13]	5	12	3	2	3	10	13	1	3	3	4
My supplier has told me I can't switch	2	3	1	1	1	4	1	2	1	2	2
I am in debt with my current supplier so I don't think I can switch	2	2	3	2	1	3	4	2	1	2	2

Source: Ipsos MORI

[11] 2011 wording: I don't think there is much difference
[12] 2011 wording: …and I think I'm already on a good deal
[13] 2011 wording: I live in a rented house and I don't think my landlord would allow me to switch

Half of all non-switchers interviewed this year say that they are happy with their current supplier and this represents a significant decline (of six percentage points) since last year. This is now the lowest this proportion has been in the series of surveys. The proportion who think switching is a hassle has remained stable at 30% this year following a previous annual increase since 2012 while the proportion of those who say they don't think there's any difference between suppliers to make switching worthwhile has declined, albeit marginally, by one point since last year. Energy customers who claim there is no difference between suppliers are most likely to include the 65+ age group, but also extend across a number of other sub-groups.

Q36. What would be the minimum amount of money you would have to save per year in order for it to encourage you to switch your gas or electricity supplier?

	Total	Age			Social grade			Internet Usage		All	
		15-34	35-64	65+	AB	C1	DE	Ever use	Never use	2013	2014
Base: All never switched supplier giving numerical answer	*(467) %*	*(116) %*	*(229) %*	*(122) %*	*(89) %*	*(161) %*	*(126) %*	*(394) %*	*(73) %*	*(419) %*	*(396) %*
0-£50	**28**	38	23	28	22	37	24	28	33	28	24
£51-100	**24**	27	20	29	23	23	25	25	18	31	33
£101-£200	**25**	12	32	26	32	21	22	23	36	26	24
£201+	**23**	22	26	17	22	18	30	24	13	15	18
MEAN	**£169**	£135	£197	£152	£167	£148	£183	£174	£135	£153	£158
MEDIAN	**£99**	£94	£152	£94	£117	£95	£122	£99	£98	£94	£99
Base: All never switched supplier	*(875) %*	*(203) %*	*(413) %*	*(259) %*	*(151) %*	*(267) %*	*(271) %*	*(689) %*	*(186) %*	*(882) %*	*(819) %*
Not about saving money	**12**	4	11	23	14	11	11	11	20	12	16
Don't know	**29**	34	28	26	22	22	37	28	37	36	32
Refused	**2**	2	1	3	1	3	2	1	4	2	2

Source: Ipsos MORI

Non-switchers were asked what the minimum potential saving might be that would encourage them to switch supplier. Over half are able to estimate an approximate minimum saving they would expect to make. Among this group, the mean saving they say would be required is £169 this year, up eleven pounds on last year. The median saving, however, which may be a more realistic figure for these purposes, has remained stable at £99. Among those who do give a value, just over half (54%) say they would only need to make a saving of £100 or less. Just under half (49%) say this saving would need to be over £100 per year to encourage them to switch their supplier.

Those non-switching customers who say the saving would have to be relatively higher to encourage them are likely to be from the DE social grades, aged 35-64, living in urban areas, living in Scotland, from BME groups and in non-rented accommodation.

Just over one in ten (12%) of all non-switchers say it is ‘not about saving money’ - down four percentage points since last year, a statistically significant decrease. Those most likely to say this tend to be 65+, live in Scotland, never use the internet, or live in non-rented accommodation.

5 Reasons for switching on last occasion

Q23. Thinking about the last time you switched your gas supplier, what was the main trigger causing you to switch?

	All 2015	Payment method-Gas			Age			Previous surveys (all)		
		Monthly/ Quarterly Direct debit	Standard credit	PPM (gas)	15-34	35-64	65+	2012	2013	2014
Base: All with mains gas and responsible for bill who have ever switched gas supplier	*(548) %*	*(424) %*	*(37) %*	*(73) %*	*(83) %*	*(316) %*	*(149) %*	*(438) %*	*(440) %*	*(496) %*
Believed new supplier to be cheaper/to save money	72	75	56	63	62	72	78	76	75	70
Moved home	9	7	8	16	19	8	3	3	6	10
Believed new supplier offered better customer service	7	6	16	3	5	7	6	5	6	4
Wanted a fixed price deal	2	2	4	-	2	2	2	2	2	6
Wanted to switch to a dual fuel package	4	4	7	4	2	6	3	5	4	3
Salesperson calling at house	*	*	-	-	-	*	-	-	1	1
Wanted a greener tariff	1	1	-	1	-	2	1	1	1	1
Believed new supplier offered better benefits	1	1	2	1	2	*	*	2	1	*
Wanted an online tariff	1	1	2	2	3	*	-	*	*	*
Dispute with supplier	1	1	-	3	1	1	2	-	*	*
Poor service	*	-	-	1	-	*	-	-	*	-
Written communication from your supplier	*	1	-	-	-	1	-	*	-	-
Other	1	*	2	*	-	1	1	3	2	2
Don't know	1	*	4	2	2	*	2	-	1	1

Source: Ipsos MORI

Q28. Thinking about the last time you switched your electricity supplier, what was the main trigger causing you to switch?

	All 2015	Payment Method - Elec			Age			Previous surveys (all)		
		Monthly/ Quarterly direct debit	Standard credit	PPM (elec)	15-34	35-64	65+	2012	2013	2014
Base: All with mains electricity and responsible for bill who have ever switched electricity supplier	*(573) %*	*(438) %*	*(36) %*	*(84) %*	*(87) %*	*(331) %*	*(155) %*	*(499) %*	*(510) %*	*(519) %*
Believed new supplier to be cheaper/to save money	72	73	53	71	64	73	72	77	76	72
Moved home	8	8	10	12	14	8	5	3	5	8
Believed new supplier offered better customer service	6	5	20	6	7	6	6	5	5	4
Wanted a fixed price deal	2	2	4	-	2	2	3	1	2	6
Wanted a dual fuel package	4	5	5	3	4	5	4	5	4	4
Salesperson calling at house	1	1	-	1	1	1	*	-	1	1
Wanted a greener tariff	2	3	-	-	2	2	3	*	1	1
Believed new supplier offered better benefits	1	1	-	2	2	*	1	2	1	*
Written communication from your supplier	1	1	-	-	-	1	1	*	*	*
Dispute with supplier	1	*	-	2	1	1	-	-	1	-
Poor service	*	*	-	-	-	*	-	-	1	-
Other	*	*	-	*	-	-	1	2	2	2
Don't know	*	1	-	-	1	*	1	-	*	1

Source: Ipsos MORI

Financial incentives continue to dominate all other triggers for switching suppliers; roughly seven in ten energy customers who have ever switched supplier for either fuel say the main trigger the last time they switched was that they believed the new supplier to be cheaper. This figure is stable since last year for electricity customers, and up (a marginal) two points, also to 72%, for gas customers this year. Moving home remains the second most frequently cited trigger for switching either fuel; the figure (8%) is stable with last year amongst electricity customers though has fallen marginally, by one point, amongst gas customers (to 9% from 10%). The search for better customer service was more frequently mentioned this year, significantly so in the case of gas switching – up three points to 7%.

6 Finding out about the deals available

Q24. Thinking about the last time you switched your gas supplier, how did you find out about the deals offered by the supplier you switched to?

	All 2015	Social Grade		Age			Physical/ Mental Impair ment		Internet Usage		Previous surveys (all)		
		AB	E	15-34	35-64	65+	*Yes*	*No*	Ever use	Never Use	2012	2013	2014
Base: All with mains gas and responsible for bill who have ever switched gas supplier	*(548) %*	*(164) %*	*(54) %*	*(83) %*	*(316) %*	*(149) %*	*(96) %*	*(452) %*	*(487) %*	*(61) %*	*(438) %*	*(440) %*	*(496) %*
Online/website price comparison service	**37**	47	17	41	40	26	20	40	40	9	34	35	40
Supplier representative knocked at my door	**10**	6	13	4	8	18	21	8	8	26	23	19	13
Salesperson in public place	**6**	3	15	11	6	5	8	6	7	4	10	7	7
Looked at websites of more than one supplier	**5**	7	3	6	6	1	*	6	5	-	3	7	5
Friend or family member	**9**	10	12	9	7	13	9	9	9	11	6	6	5
New supplier phoned me	**6**	3	3	2	7	5	6	6	6	8	6	5	5
I saw an advert	**2**	1	-	1	3	1	-	2	2	4	2	3	5
Phoned comparison service	**4**	2	6	5	3	6	4	4	4	6	4	4	4
I rang them (only)	**6**	7	12	9	7	3	8	6	5	11	4	4	3
I rang them and other suppliers	**5**	3	9	7	6	2	7	5	5	4	3	3	3
Looked at supplier's own website only	**4**	2	2	8	4	1	1	4	4	-	3	3	2
Written communication or marketing material	**2**	2	-	-	2	3	3	1	2	-	1	1	2
Through a collective (group) switching campaign	**1**	1	2	-	1	3	-	2	1	2	-	1	2
Other	**7**	12	6	6	6	10	9	6	6	17	4	7	5
Don't know	**2**	2	3	2	1	4	4	2	2	1	4	4	3

Source: Ipsos MORI

Q29. Thinking about the last time you switched your electricity supplier, how did you find out about the deals offered by the supplier you switched to?

	All 2015	Social Grade		Age			Physical/ Mental Impair-ment		Internet Usage		Previous surveys (all)		
		AB	E	15-34	35-64	65+	*Yes*	*No*	Ever use	Never Use	2012	2013	2014
Base: All with mains electricity and responsible for bill who have ever switched electricity supplier	*(573) %*	*(180) %*	*(58) %*	*(87) %*	*(331) %*	*(155) %*	*(104) %*	*(469) %*	*(506) %*	*(67) %*	*(499) %*	*(510) %*	*(519) %*
Online/website price comparison service	**40**	48	23	47	43	29	23	44	44	9	31	37	40
Supplier representative knocked at my door	**10**	6	11	8	8	18	20	8	9	21	22	17	12
Salesperson in public place	**7**	4	15	10	5	8	15	5	7	10	7	7	8
Friend or family member	**7**	5	9	7	6	11	7	7	6	10	5	6	6
I rang them (only)	**7**	8	12	7	8	4	9	7	6	17	4	5	4
New supplier phoned me	**6**	3	7	3	7	5	6	6	5	11	8	4	5
Looked at the websites of more than one supplier	**5**	6	-	3	6	4	4	6	6	1	3	5	5
Phoned comparison service	**5**	4	6	3	4	6	8	4	4	7	5	4	4
I rang them and other suppliers	**4**	2	7	5	4	2	4	4	4	1	3	4	3
Looked at supplier's own website	**2**	2	2	5	2	2	-	3	3	-	4	2	4
I saw an advert	**2**	2	1	-	3	1	-	3	2	4	5	3	3
Through a collective (group) switching campaign	**2**	2	2	1	1	4	*	2	1	3	-	1	2
Written communication or marketing material	**1**	1	-	-	1	1	1	1	1	-	1	3	2
Other	**5**	7	5	5	5	5	2	6	5	4	3	7	4
Don't know	**2**	4	3	1	3	2	3	2	2	2	3	2	2

Source: Ipsos MORI

Information sources for switching either fuel continue to be dominated by price comparison websites; this figure is stable (at 40%) amongst electricity customers, though has fallen a marginal three points to 37% amongst gas customers. Information from a supplier representative knocking at the door is the second most-cited information source for both fuels though continues its long term decline; the proportion of those finding out about switching via representatives at the door has fallen by two points for electricity customers (to 10%) and three points for gas (also to 10%). Other secondary information sources for finding out about the deals offered include supplier representatives in public places, friends or family members, ringing the suppliers or the suppliers ringing customers. Mentions of collective switching schemes, introduced as an answer option in 2013, still only account for a very small proportion of overall mentions; 1% for gas customers and 2% for electricity customers.

7 Method used to make the last switch

Q25. Thinking about the last time you switched your gas supplier, how did you switch?

	All 2015	Payment Method- Gas		Age			Social Grade		Internet Usage		Previous survey (all)	
		Monthly/ Quarterly Direct Debit	Standard credit	15-34	35-64	65+	AB	DE	Ever use	Never Use	2013	2014
Base: All with mains gas and responsible for bill who have ever switched gas supplier	*(548) %*	*(424) %*	*(37) %*	*(83) %*	*(316) %*	*(149) %*	*(164) %*	*(108) %*	*(487) %*	*(61) %*	*(440) %*	*(496) %*
Phoning supplier	29	29	26	32	30	25	23	34	27	48	29	27
Online/website price comparison service	27	30	22	38	26	23	29	16	30	6	26	31
Through a salesperson who knocked at my door	11	9	19	6	9	20	7	16	10	26	19	15
Through the supplier's website	10	11	12	8	14	4	15	11	11	1	5	7
Through salesperson in public place	5	4	4	9	4	4	4	9	5	6	7	5
Telephone price comparison service	3	3	3	4	2	6	2	5	3	8	4	3
Written communications	2	2	-	1	1	3	3	1	2	2	2	1
Through a collective (group) switching campaign	1	1	3	-	1	4	2	2	1	2	1	2
Other	8	8	9	2	9	9	12	5	9	2	5	6

Source: Ipsos MORI

Q30. Thinking about the last time you switched your electricity supplier, how did you switch?

	All 2015	Payment Method -Elec		Age			Social Grade		Internet Usage		Previous survey (all)	
		Monthly/ Quarterly Direct Debit	Standard credit	15-34	35-64	65+	AB	DE	Ever use	Never Use	2013	2014
Base: All with mains electricity and responsible for bill who have ever switched electricity supplier	*(573) %*	*(436) %*	*(36) %*	*(87) %*	*(331) %*	*(155) %*	*(180) %*	*(116) %*	*(506) %*	*(67) %*	*(510) %*	*(519) %*
Online/website price comparison service	**29**	32	16	38	27	26	31	19	31	7	26	31
Phoning supplier	**29**	29	28	25	31	25	24	35	27	44	29	27
Through a salesperson who knocked at my door	**11**	9	24	9	8	20	7	16	9	23	17	14
Through supplier's website	**10**	12	10	7	13	5	15	8	12	1	6	9
Through salesperson in public place	**6**	5	2	11	4	6	5	10	5	9	7	5
Telephone price comparison service	**3**	3	2	4	3	3	4	4	3	5	3	3
Written communications	**1**	1	1	-	1	3	2	1	1	6	3	2
Through a collective (group) switching campaign	**1**	1	3	1	1	3	2	2	1	2	1	1
Other	**7**	6	4	4	8	7	7	4	7	3	5	6

Source: Ipsos MORI

While energy customers find out about new suppliers largely via price comparison websites, when it comes to actually making a supplier switch, phoning the supplier is equally the most frequently reported as the method for doing so. Amongst electricity switchers, 29% say the last time they switched they did so by phoning their supplier; the same proportion said they did so via a price comparison website. For gas customers, phoning the supplier was reported by 29% while only 27% said they switched online via a comparison site. This marks a shift from last year, when price comparison websites were the most frequently reported method of switching for both fuels, and returns to the rank order of 2013. Phoning the new supplier directly appeals most to those individuals in social grades DE, those in BME groups, those who never use the internet and those in rented accommodation.

Following the same direction as previous years' trends, the proportion of customers who say they changed their supplier with a doorstep salesman has declined, though the one year change is not statistically significant in itself. This year, 11% of those who have ever switched either gas or electricity supplier say the last time they did so was through a sales representative who came to their door. While this figure is significantly lower than those who have done so by phoning the new supplier or through an online price comparison site, it still represents the third most frequently cited option. Switching supplier for either fuel through the new suppliers' website is a method growing in popularity year on year; while this year is not statistically significantly different from last year, it does represent a significant increase on 2013.

8 Expectation of savings on switching

Q37. On the last occasion when you decided to switch your supplier, how much did you expect to save per year?

		Age			Social Grade		Previous survey (all)	
		15-34	35-64	65+	AB	DE	2013	2014
Base: All ever switched giving numerical answer	*(353) %*	*(49) %*	*(211) %*	*(93) %*	*(123) %*	*(54) %*	*(261) %*	*(293) %*
0-£50	**11**	12	9	14	10	14	16	18
£51-£100	**26**	30	27	17	21	18	35	30
£101-£200	**42**	41	40	49	44	46	34	32
£201+	**21**	17	23	20	24	22	15	20
MEAN	**178**	162	178	189	195	170	£195	£167
MEDIAN	**144**	118	138	147	171	143	£100	£111
Base: All ever switched either fuel	*(623) %*	*(94) %*	*(361) %*	*(168) %*	*(187) %*	*(126) %*	*(551) %*	*(574) %*
Not about saving money	**12**	11	11	14	12	14	11	11
Don't know	**29**	30	28	31	24	39	40	37

Source: Ipsos MORI

Just over half of those who have ever switched supplier are able to give a figure for how much they expected to save the last time they switched. Mean and median expected savings are both up this year, the median quite substantially (by £33 to £144).

The median expected saving on the last switching occasion is considerably higher than the median amount required to encourage non-switchers to change supplier (£99).

As in previous years, the proportion who say their last switch was 'not about saving money' is roughly one in ten. However, there has been a significant fall in the proportion who were unable to give an amount they expected to save – down from 37% in 2014 to 29% this year. The proportion saying don't know is significantly higher among social grades DE than other groups.

9 Customers' evaluations of switching

Q26. To the best of your knowledge, do you feel that you are now paying less than you would have if you had not switched? (gas)

	All 2015	Social grade			Previous surveys (all)		
		AB	C1	DE	2012	2013	2014
Base: All who switched gas supplier to save money	(384) %	(115) %	(130) %	(74) %	(336) %	(328) %	(350) %
Yes	**82**	89	84	75	72	68	69
No	**14**	9	12	23	17	19	20
Don't know	**4**	2	4	3	11	13	10

Source: Ipsos MORI

Q31. To the best of your knowledge, do you feel that you are now paying less than you would have if you had not switched? (electricity)

	All 2015	Social Grade			Previous surveys (all)		
		AB	C1	DE	2012	2013	2014
Base: All who switched electricity supplier to save money	(404) %	(125) %	(133) %	(83) %	(387) %	(384) %	(374) %
Yes	**81**	85	83	72	73	70	73
No	**15**	10	13	25	13	20	19
Don't know	**4**	5	4	3	14	10	8

Source: Ipsos MORI

There have been significant increases this year in the proportion of customers who switched suppliers to save money who say they feel they are now paying less as a result of having switched. For gas customers, the proportion who think they have saved money has risen from 69% in 2014 to 82% this year. The increase is slightly less dramatic for electricity customers though still statistically significant, having increased from 73% in 2014 to 81% this year.

The percentages for those who disagree they are now paying less than they would be if they had not switched have fallen (significantly for gas) since last year to 14% (for gas switchers) and 15% (for electricity). These customers are most likely to be aged 15-34, have real financial problems, to be in social grades DE, from BME groups, or never use the internet.

Q27-1.How much do you agree or disagree that:
"I found it easy to decide which deal to switch my gas to" (gas)

	All 2015	Social grade		Previous surveys (all)		
		AB	DE	2012	2013	2014
Base: All with mains gas and responsible for bills who have ever switched gas supplier	*(548) %*	*(164) %*	*(108) %*	*(438) %*	*(440) %*	*(496) %*
Agree	**76**	78	69	72	69	68
Neither	**12**	8	17	9	11	13
Disagree	**12**	14	14	17	19	19
No opinion/ Don't know	-	-	-	2	*	*

Source: Ipsos MORI

Q32-1.How much do you agree or disagree that:
"I found it easy to decide which deal to switch my electricity to" (electricity)

	All 2015	Social grade		Previous surveys (all)		
		AB	DE	2012	2013	2014
Base: All with mains electricity and responsible for bills who have ever switched electricity supplier	*(573) %*	*(180) %*	*(116) %*	*(499) %*	*(510) %*	*(519) %*
Agree	**74**	76	72	75	68	72
Neither	**13**	11	10	7	12	10
Disagree	**12**	12	18	16	19	18
No opinion/ Don't know	*****	1	-	2	*	*

Source: Ipsos MORI

This year, about three-quarters of all those customers who have ever switched supplier for either fuel say they agree with the statement 'I found it easy to decide which deal to switch my electricity/gas to;' This represents a significant eight-point increase for gas switchers and a marginal two-point increase amongst electricity switchers.

Nevertheless those most likely to have found it easy to decide are those who usually keep up with their bills without difficulties, those in social grades ABC1 (particularly for gas customers), those from the white ethnic group, internet users and those without a physical or mental impairment.

Q27-2. How much do you agree or disagree that:
"*I am confident that I fully understand the key features of the deal I switched to*" (gas)

	All 2015	Area			Social grade		Previous surveys (all)		
		Urban	Suburban	Rural	AB	DE	2012	2013	2014
Base: All with mains gas and responsible for bills who have ever switched gas supplier	*(548) %*	*(343) %*	*(110) %*	*(95) %*	*(164) %*	*(108) %*	*(438) %*	*(440) %*	*(496) %*
Agree	**79**	79	79	80	82	71	73	72	75
Neither	**11**	10	16	7	10	14	7	10	10
Disagree	**10**	11	5	11	8	16	19	18	14
No opinion/ Don't know	*	-	-	1	*	-	1	-	*

Source: Ipsos MORI

Q32-2. How much do you agree or disagree that:
"*I am confident that I fully understand the key features of the deal I switched to*" (electricity)

	All 2015	Social Grade		Previous surveys (all)		
		AB	E	2012	2013	2014
Base: All with mains electricity and responsible for bills who have ever switched electricity supplier	*(573) %*	*(180) %*	*(58) %*	*(499) %*	*(510) %*	*(519) %*
Agree	**79**	81	76	74	73	76
Neither	**11**	10	9	7	10	8
Disagree	**10**	9	15	17	17	15
No opinion/ Don't know	*	1	-	2	-	*

Source: Ipsos MORI

Overall, roughly four-fifths (79% for both) of either gas or electricity switchers express confidence in understanding the key features of their new deals while 10% (for both fuels) disagree. There have been only marginal increases in the proportions agreeing (of four and three points for gas and electricity, respectively) and simultaneous marginal declines in those who disagree (of four and five points for gas and electricity customers, respectively), all of which implies movement in a positive direction.

The proportions most likely to disagree tend to be significantly higher among those on standard credit or PPM, those who never use the internet, and those that have a physical or mental impairment.

Q27-3. How much do you agree or disagree that:
"I would be confident that if I switched again, I would make the right choice for me" (gas)

	All 2015	Age			Social Grade		Internet Usage		Previous survey (all)	
		15-34	35-64	65+	AB	DE	Ever use	Never Use	2013	2014
Base: All with mains gas and responsible for bills who have ever switched gas supplier	*(548) %*	*(83) %*	*(316) %*	*(149) %*	*(164) %*	*(108) %*	*(487) %*	*(61) %*	*(440) %*	*(496) %*
Agree	**79**	77	85	65	86	66	83	42	70	71
Neither	**10**	9	7	19	5	16	8	30	15	15
Disagree	**10**	14	7	15	8	18	9	25	14	14
No opinion/ Don't know	*	-	-	1	*	-	-	2	*	1

Source: Ipsos MORI

Q32-3. How much do you agree or disagree that:
"I would be confident that if I switched again, I would make the right choice for me" (electricity)

	All 2015	Age			Social Grade		Internet Usage		Previous survey (all)	
		15-34	35-64	65+	AB	DE	Ever use	Never Use	2013	2014
Base: All with mains electricity and responsible for bills who have ever switched electricity supplier	*(573) %*	*(87) %*	*(331) %*	*(155) %*	*(180) %*	*(116) %*	*(506) %*	*(67) %*	*(510) %*	*(519) %*
Agree	**80**	76	86	67	83	68	83	51	72	77
Neither	**10**	10	7	17	9	11	9	20	13	9
Disagree	**10**	14	7	16	8	21	8	28	15	14
No opinion/Don't know	*	-	*	*	1	1	*	1	-	1

Source: Ipsos MORI

A large majority of energy customers who have ever switched either fuel agree that they would be confident that if they switched again, they would make the right choice for them. 79% of gas customers say this. This figure has risen significantly by eight percentage points since last year. For electricity customers, 80% agree they would be confident which is up a marginal three points from last year. Those who disagree they would be confident in making the right choice for them next time round amount to 10% for each fuel, a four-point decline in each case since last year.

Those less confident are, again, significantly more likely to include those on standard credit or PPM, in social grades DE, never use the internet, have children under 5, and to have a physical/mental impairment.

10 Attitudes to tariff choices

Q39. Using the answers here, how easy or difficult do you believe it is to compare different tariffs for electricity or gas?

	All 2015	Age			Internet Usage		Physical/Mental Impairment		Previous survey (all)	
		15-34	35-64	65+	Ever use	Never Use	Yes	No	2013	2014
Base: All with mains electricity or gas and responsible for bills	*(1498) %*	*(297) %*	*(774) %*	*(427) %*	*(1240) %*	*(258) %*	*(279) %*	*(1219) %*	*(1,433) %*	*(1393) %*
Very easy	14	17	14	11	14	11	14	14	13	13
Fairly easy	30	35	32	24	32	20	25	31	23	29
Neither easy nor difficult	23	24	21	25	22	28	24	22	24	21
Fairly difficult	21	16	22	22	21	21	18	21	22	20
Very difficult	9	3	8	15	8	15	15	8	15	12
Don't know	3	4	3	3	3	5	5	3	3	4

Source: Ipsos MORI

There is positive, though marginal, improvement this year in customers' evaluation of the perceived difficulty of comparing different tariffs. The proportion that rates this as easy is up two points this year and now comprises 44% of all energy customers. Likewise, the proportion of those rating it difficult is down two points from last year to 30% overall.

Those who say they think it is difficult to compare tariffs for either fuel are disproportionately represented among those who are 65 and over, those having real financial problems and non-users of the internet.

Q40. What is it that makes them difficult to compare? (SPONTANEOUS – OPEN ENDED)	All	Social Grade			Internet usage		Tenure		Previous survey (all)
	2015	AB	C2	E	Ever use	Never use	Rented	Not Rented	2014
Base: All those who answered 'very/fairly difficult' at OG39	*(438) %*	*(110) %*	*(69) %*	*(57) %*	*(347) %*	*(91) %*	*(119) %*	*(319) %*	*(457) %*
Confusing tariffs/information/difficult to understand/ complicated/Don't know how to compare (net)	35	38	45	41	36	29	32	36	33
Hard to compare like for like/ Not standardised information/ different deals/ prices in different formats	13	24	8	9	16	-	6	16	21
Too many tariffs/ multiple rates/ structures/ choices	12	7	8	11	12	12	7	13	16
Too much jargon/ technical language/ terminology used	9	6	9	16	7	15	8	9	9
Do not keep to price promised/ hidden costs/ misleading/incorrect/ conflicting info/ not transparent/ honest (net)	6	6	3	4	7	3	7	6	7
Not computer literate/ not financially minded/ too many numbers/ suffer from dyslexia (net)	3	3	2	2	2	5	3	3	4
No computer/internet access	3	4	1	6	*	16	4	3	*
No time/takes too long	3	3	-	-	3	2	1	3	3
Prices keep increasing/changing	3	0	6	4	3	1	5	2	3
Not enough information	2	4	2	-	3	-	1	3	3
Other	5	4	8	6	6	2	5	5	6
Don't know	5	4	7	4	4	14	8	5	7

Source: Ipsos MORI

Those energy customers who say they believe it is difficult (either very or fairly) to compare different tariffs are asked why they think this. General comments about confusing and complicated tariffs continue to dominate the reasons cited for finding comparisons difficult; 35% give this response, and this is marginally (2 points) up from last year. This response is most likely among those aged 35 and over, those having real financial problems, those in social grade C2 and E, those in Scotland, internet users, those with children under 5 and those with a physical/ mental impairment.

Just over one in ten (13%) of those who think it is difficult to compare tariffs say it is hard to compare like with like because the information or prices are shown in non-comparable formats. Though this is the second most frequently cited reason, it has fallen significantly by eight points (from 21%) since last year. The third most reported reason has experienced a similar downward trend; the proportion who say there are too many tariffs is 12% this year but was 16% in 2014.

Other reasons for expressing difficulty include too much jargon, hidden or misleading costs, not being computer literate and not having internet access or a computer.

Q41. Thinking about the number of different tariffs available to you, in your view, are there the right number of energy tariffs available, or are there too many tariffs or too few tariffs?

	All	Social Grade			Age			Tenure		Previous survey (all)
		AB	C2	E	15-34	35-64	65+	Rented	Not rented	2014
Base: All those with mains electricity or gas who are responsible for bills	*(1498) %*	*(338) %*	*(287) %*	*(191) %*	*(297) %*	*(774) %*	*(427) %*	*(458) %*	*(1040) %*	*(1393) %*
The right number of tariffs	23	25	26	16	33	21	20	24	23	21
Too many tariffs	57	57	55	59	48	62	55	55	58	62
Too few tariffs	5	2	5	8	6	4	4	5	4	4
Don't know	15	16	14	18	13	13	21	15	15	12

Source: Ipsos MORI

Fifty seven per cent of all customers think there are too many tariffs available, although 44% consider they are easy to compare. What this suggests is that while the number of tariffs does not necessarily make them difficult to compare, there is a majority feeling that there are simply too many to choose from. That said, there has been a significant 5-point decline in the proportion saying this since last year and the year before (from 62% in both 2013 and 2014 to 57% this year). Almost a quarter (23%) of all energy customers think there are the right number of tariffs available to them, while a very small minority (5%) think there are too few.

Those who think there are too many tariffs available fall largely into the following categories of customer: aged 35-64, having real financial problems and internet users.

Q41. Thinking about the number of different tariffs available to you, in your view, are there the right number of energy tariffs available, or are there too many tariffs or too few tariffs? BY TYPOLOGY

	All	Consumer Typology (see Appendix)				Previous survey (all)
		Disengaged	Partially engaged	Lapsed engaged	Recently engaged	2014
Base: All those with mains electricity or gas who are responsible for bills	*(1498) %*	*(784) %*	*(91) %*	*(280) %*	*(343) %*	*(1393) %*
The right number of tariffs	**23**	22	27	21	27	21
Too many tariffs	**57**	*53*	55	62	62	62
Too few tariffs	**5**	5	5	4	4	4
Don't know	**15**	20	12	13	7	12

Source: Ipsos MORI

Among customer typologies (see appendix 14.8 for details), and as was the case last year, it is those with the most experience of switching supplier, the Lapsed Engaged and Recently Engaged customers, who are most likely to say there are too many tariffs available to them (both 62%) though in both cases this is down eight points since last year. Those who are categorised as 'disengaged' customers, that is those who have never switched supplier or tariff/payment method in 2014/15, are most likely of all to give a 'don't know' response to this question.

Q42. To what extent would you say you understand the range of different energy tariffs available to you?

	All	Social Grade		Internet Usage		Physical/Mental Impairment		Previous survey (all)
	2015	AB	DE	Ever use	Never use	Yes	No	2014
Base: All those with mains electricity or gas who are responsible for bills	*(1498) %*	*(338) %*	*(397) %*	*(1240) %*	*(258) %*	*(279) %*	*(1219) %*	*(1393) %*
Completely	**10**	14	5	11	7	8	11	9
A fair amount	**38**	39	29	40	26	30	40	41
Not very much	**33**	34	40	33	31	31	33	34
Not at all	**15**	10	21	13	29	26	13	13
Don't know	**3**	4	5	3	7	5	3	3

Source: Ipsos MORI

The overall proportion of customers who say they understand the range of different energy tariffs available to them either completely or a fair amount is 48%; a marginal two-point decline from last year. But customers remain deeply split on this issue; the proportion who say they do not understand the range of tariffs either very much or at all is also 48%.

Perceived understanding is lower amongst those who are 65 and above, those having real financial problems, those in social grades DE, those who never use the internet, those who live in rented accommodation, and those with a physical or mental impairment.

Q42. To what extent would you say you understand the range of different energy tariffs available to you? BY TYPOLOGY

		Consumer Typology (see Appendix)				Previous survey (all)
	All	Disengaged	Partially engaged	Lapsed engaged	Recently engaged	2014
Base: All those with mains electricity or gas who are responsible for bills	*(1498) %*	*(784) %*	*(91) %*	*(280) %*	*(343) %*	*(1393) %*
Completely	**10**	8	10	10	14	9
A fair amount	**38**	*34*	36	40	47	41
Not very much	**33**	33	40	36	28	34
Not at all	**15**	20	12	10	9	13
Don’t know	**3**	5	1	3	1	3

Source: Ipsos MORI

Expressed understanding of the range of different energy tariffs is highest amongst the Recently Engaged (see appendix 14.8 for detailed definitions) and lowest amongst the Disengaged group of energy customers. That said, nearly one in ten (9%) of the Recently Engaged customers still say they do not understand them ‘at all.’

11 Information and communication received from suppliers

11.1 Types of information received

Q5a. In the last year, have you received information from your supplier about: the name of the tariff you are on (your tariff is the pricing plan for the electricity and/or gas you use)?

	All 2015	Payment method (gas)			Social grade		Area			Tenure		Previous survey (all)	
		Monthly/ Quarterly Direct debit	Standard credit	PPM (gas)	AB	E	Urban	Sub-urban	Rural	Rent ed	Not rented	2013	2014
Base: All with mains gas or electricity who are responsible for bills	*(1498) %*	*(915) %*	*(131) %*	*(209) %*	*(338) %*	*(191) %*	*(919) %*	*(316) %*	*(263) %*	*(458) %*	*(1040) %*	*(1,433) %*	*(1393) %*
Yes	59	64	54	43	68	47	57	63	60	48	63	54	59
No	35	29	40	53	25	49	37	32	34	47	30	42	35
Don't know	6	6	6	4	7	4	6	6	6	5	7	4	6

Source: Ipsos MORI

This year's figures mirror those of 2014, with 59% saying they have received information from their supplier in the past year about the name of the tariff they are on. Perception of having received this information is highest amongst those who pay for their fuels by monthly/quarterly direct debit, those aged 35 and above, those who are keeping up with bills without any problems, those in the social grades ABC1, those from the white ethnic group, those living in Scotland, and those in non-rented accommodation.

Those least likely to remember being told the name of their tariff include those on quarterly direct debit, standard credit or PPMs, those aged up to 34, those who struggle financially, those from BME groups, those who never use the internet, those in rented accommodation, those who have mobile phones only, or those from social grades C2DE, especially those from grades DE who have children under 5.

Q5b. In the last year, have you received information from your supplier about: any changes to your tariff?

	All 2015	Payment method (gas)			Social grade			Tenure		Internet usage		Previous survey (all)	
		Monthly/ Quarterly Direct debit	Standard credit	PPM (gas)	AB	C1	DE	Ren ted	Not rented	Ever use	Never use	2013	2014
Base: All with mains gas or electricity who are responsible for bills	*(1,498) %*	*(915) %*	*(131) %*	*(209) %*	*(338) %*	*(476) %*	*(397) %*	*(458) %*	*(1040) %*	*(1240) %*	*(258) %*	*(1,433) %*	*(1393) %*
Yes	39	44	34	25	52	41	27	26	44	40	35	40	43
No	56	50	63	70	43	55	68	70	51	56	59	56	52
Don't know	5	5	3	4	5	4	5	4	5	5	5	4	5

Source: Ipsos MORI

In contrast to receiving information regarding the *name* of the tariff, energy customers are less likely to have received information about *changes to* their tariff. The proportion of customers who say they have received information from their supplier in the past year about changes to their tariff is 39%, down a significant four points from last year. Likewise, the proportion saying they have not received any such information is up significantly by four points to 56%. Awareness of changes is highest amongst those paying by monthly/quarterly direct debit, those over 35, those who are keeping up with bills, those in social grades AB and C1, those in Scotland, and those living in non-rented accommodation.

By contrast, those least likely to be aware of information from their supplier about changes to tariffs include those aged 15-34, those with financial problems, social grades DE (especially those with children under 5), those in Wales, those in rented accommodation and those who have a mobile phone only.

Q5c. In the last year, have you received information from your supplier about: the forecast cost of your energy consumption over the coming year?

	All 2015	Payment method (gas)			Social grade		Internet usage		Area		Tenure		Previous survey (all)	
		Monthly/ Quarterly Direct debit	Standard credit	PPM (gas)	AB	DE	Ever use	Never use	Urban	Rural	Rent ed	Not rented	2013	2014
Base: All with mains gas or electricity who are responsible for bills	*(1,498) %*	*(915) %*	*(131) %*	*(209) %*	*(338) %*	*(397) %*	*(1240) %*	*(258) %*	*(919) %*	*(263) %*	*(458) %*	*(1040) %*	*(1433) %*	*(1393) %*
Yes	**57**	61	54	43	68	47	58	48	54	57	44	61	47	52
No	**38**	34	41	53	27	47	37	47	41	39	51	33	48	43
Don't know	**5**	5	4	4	5	7	5	5	5	4	5	5	4	6

Source: Ipsos MORI

Almost three-fifths (57%) of energy customers now say they recall receiving information from their supplier about the forecast cost of their energy consumption; significantly more than those who say they do not recall this. This year marks a continuation of the trend seen in previous years, namely the growth in the proportion of those who say they have received this information from their supplier.

Those most likely to be aware are those aged 35-64, those in the ABC1 social grades, those from the white ethnic group, those in Scotland, internet users, those living in non-rented accommodation and those without children under 5.

By contrast, those least likely to remember receiving this information are those with PPMs, those aged under 35, those struggling financially, social grades C2DE, the BME groups, those who never use the internet, those in rented accommodation and those with mobile phones only and those with children under 5 who are also in social grades DE.

11.2 Attitudes to specific communications

Q43. Please tell me if you recall receiving any of the following in the last year? You may have received these via post or email.

		All 2015	Age			Social Grade			Tenure		Previous survey (all)
			15-34	35-64	65+	AB	C2	DE	Rented	Not rented	2014
Base: All those with mains electricity or gas who are responsible for bills		*(1498) %*	*(297) %*	*(774) %*	*(427) %*	*(338) %*	*(287) %*	*(397) %*	*(458) %*	*(1040) %*	*(1393) %*
At least one bill or statement of account	Yes	**80**	69	83	84	88	75	71	70	84	83
	No	**19**	30	16	14	10	24	28	28	15	15
	Don't know	**1**	2	1	2	2	1	1	2	1	2
An annual statement	Yes	**71**	58	74	76	77	67	62	60	75	67
	No	**26**	38	23	21	18	30	36	37	21	30
	Don't know	**3**	4	3	3	4	4	2	3	3	3
Base: All not on a fixed term contract for both electricity and gas		*(794) %*	*(181) %*	*(400) %*	*(213) %*	*(162) %*	*(146) %*	*(244) %*	*(274) %*	*(520) %*	*(756) %*
A price increase notification letter	Yes	**43**	28	50	42	49	35	38	37	45	59
	No	**49**	65	42	48	36	57	59	57	45	36
	Don't know	**8**	7	8	10	15	8	3	6	9	5
Base: All on fixed term for at least one fuel		*(848) %*	*(145) %*	*(444) %*	*(259) %*	*(207) %*	*(172) %*	*(186) %*	*(237) %*	*(611) %*	*(748) %*
An end of fixed term letter	Yes	**43**	33	43	50	50	37	42	32	47	38
	No	**55**	66	54	49	48	61	56	66	51	59
	Don't know	**2**	1	2	1	2	2	1	2	2	3

Source: Ipsos MORI

Bills or statements of account continue to be the most widely received communications from suppliers despite a significant (three point) decline since last year; 80% of energy customers recall receiving at least one of these in the last year. A fifth (19%), however, say they do not and these individuals tend to be those paying for their fuels by PPM (not unexpectedly), those in the 15-34 age category, those with real financial problems, those in the lower social grades, those from BME groups, those in rented accommodation, those with mobile phones only and those with children under 5 who simultaneously fall into the DE social grade.

The proportion of customers who say they have received an annual statement in the last year has increased significantly by four points to 71% this year; a continuation of last year's upward trend. This rises to 76% amongst those aged 65+ and to 81% amongst those in Scotland.

Among those not on a fixed term tariff for both fuels, just two-fifths (43%) recall receiving a price increase notification letter either by post or email. This is significantly lower than last year when three-fifths (59%) could remember receiving one of these, which reflects a general trend of falling energy prices this last year. Awareness of a price increase notification letter is highest amongst those aged 35-64, those in social grades AB and C1 and those in rural areas.

Of those who identify themselves as being on a fixed term tariff (57% of those who have mains electricity or gas and are responsible for the bills – a proportion consistent with last year's tracker survey, but probably still represents an overestimate compared to Ofgem's monitoring data[14]), 43% say they recall receiving an end of fixed term letter in the last year. Over half (55%), however, say they do not. The proportion that does is up significantly from last year by five percentage points and is highest among those aged 65+, those in social grades AB, those in suburban areas and those in non-rented accommodation.

Q44/46/48/50. Summary Table – Attention paid to supplier communications

	End of fixed term letter		Annual Statement		Bill or statement of account		Price increase notification letter	
Base:	*All who received an end of fixed term letter in past year*		*All who received annual statement in last year*		*All who received a bill or statement of account in last year*		*All who received a price notification letter in past year*	
	2014	***2015***	*2014*	***2015***	*2014*	***2015***	*2014*	***2015***
	(286) %	***(372) %***	*(935) %*	***(1034) %***	*(1140) %*	***(1171) %***	*(443) %*	***(322) %***
Read it in detail	55	50	44	41	42	40	35	39
Glanced over it or skim read it	36	40	46	49	47	46	53	51
Only saw what it was, but did not read it	6	7	6	6	7	8	8	6
Did not read it at all	3	3	4	4	4	6	4	4

Source: Ipsos MORI

End of fixed term letters are read in the most detail; half of energy customers who received one say they read it in detail, though this proportion is down (a marginal) five points on last year. Annual statements, bills or statements of account and price increase notification letters are read in detail by roughly two-fifths of those who received them.

[14] Ofgem data from January 2015 suggests that approximately 40% of customers are on fixed term tariffs

Q45/47/49/51. Summary Table – Effect of supplier communications

	Annual Statement				Bill or statement of account			
	2014		*2015*		*2014*		*2015*	
Base:	*All who read in detail/ glanced over annual statement*				*All who read in detail/ glanced over bill or statement of account*			
	(828) %		*(931) %*		*(1006) %*		*(1015) %*	
	Agree	Disagree	Agree	Disagree	Agree	Dis agree	Agree	Disagree
	%	%	%	%	%	%	%	%
I understood the information	79	8	82	7	80	8	81	9
The information made me consider my energy options	46	28	39	34	40	33	34	42
I took action as a result of reading this information. For example, I looked into, or actually switched supplier, tariff or payment method	31	47	27	54	29	52	27	55

Source: Ipsos MORI

Q45/47/49/51. Summary Table – Effect of supplier communications

	Price increase notification letter				End of fixed term letter			
	2014		*2015*		*2014*		*2015*	
Base:	*All who read in detail/ glanced over price increase notification letter*				*All who read in detail/ glanced over end of fixed term letter*			
	(388) %		*(287) %*		*(261) %*		*(335) %*	
	Agree	Disagree	Agree	Disagree	Agree	Disagree	Agree	Disagree
	%	%	%	%	%	%	%	%
I understood the information	81	8	82	9	90	3	85	6
The information made me consider my energy options	41	40	43	36	59	20	52	27
I took action as a result of reading this information. For example, I looked into, or actually switched supplier, tariff or payment method	23	57	31	53	51	28	44	37

Source: Ipsos MORI

Understanding of supplier communications is strong for all of those measured and in fact, has increased across the board since last year, except for end of fixed term letters which are down (a marginal) five points. The most effective call to action continues to be the end of fixed term letter; over two-fifths (44%) of those who read in detail or glanced over one of these in the last year said they took action as a result of having done so. This proportion has declined, however, by seven points since last year. A price increase notification letter is only marginally more successful in spurring customers to action than an annual statement or bill or statement of account. The possible confusion over fixed rate tariffs does, however, cast some doubt over the corresponding figures for end of fixed term letters.

In terms of encouraging customers to consider their energy options, bills or statement of accounts are the least effective while an end of fixed term letter is the most. Over half (52%) say the information in the end of fixed term letter made them consider their energy options, though this is, again, down a little compared with last year (59%).

Appendix 14.8 shows these same figures broken down by the four typologies, or consumer segments. Generally, there is a pattern which sees engagement increasing from Disengaged to Partially Engaged to Lapsed Engaged. The Recently Engaged group is by far the most likely to say they take action as a result of these communications.

12 Trust in openness and transparency of suppliers

Q52. Using the words here, please tell me the extent to which you trust or distrust energy suppliers to be open and transparent in their dealings with customers?

	Total 2015	Age			Social grade		Ethnicity		Internet usage		Previous survey (all)	
		15-34	35-64	65+	AB	DE	White	BME	Ever use	Never use	2013	2014
Base: All with mains gas or electricity who are responsible for bills	(1,498) %	(297) %	(774) %	(427) %	(338) %	(397) %	(1339) %	(155) %	(1240) %	(258) %	(1,433) %	(1393) %
Trust (completely/ tend to)	**35**	39	31	40	34	39	35	32	34	44	29	28
Neither	**28**	28	30	24	27	26	27	36	29	23	27	27
Distrust (completely/ tend to)	**37**	32	39	35	39	35	37	31	37	33	43	44

Source: Ipsos MORI

While distrust of energy suppliers to be open and transparent in dealing with customers continues to outweigh trust, the gap has narrowed quite substantially since last year. Currently, 35% say they trust suppliers while 37% say they distrust them; this 2% difference is a considerable improvement over the 16% difference last year. The proportion who trust suppliers is up a significant seven points while the proportion that distrusts them is down (an also significant) seven points.

Notably, trust is up 11 percentage points among the AB social grade since last year, though it remains outweighed by the high level of distrust among this group.

Those who are most trusting tend to be customers paying by standard credit, those aged 65+, those in Wales and those who never use the internet.

Q52. Using the words here, please tell me the extent to which you trust or distrust energy suppliers to be open and transparent in their dealings with customers?

	Total 2015	Consumer typologies (see appendix) Disengaged	Partially engaged	Lapsed engaged	Recently engaged	Previous survey (all) 2014
Base: All with mains gas or electricity who are responsible for bills	*(1,498) %*	*(784) %*	*(91) %*	*(280) %*	*(343) %*	*(1393) %*
Trust (completely/tend to)	35	37	33	34	33	28
Neither	28	29	*24*	27	26	27
Distrust (completely/tend to)	37	33	42	39	41	44

Source: Ipsos MORI

Those customers who are classified as 'Disengaged' are most likely of all to trust suppliers to be open and transparent and least likely to distrust them. It is the Partially Engaged and the Recently Engaged customers who report the highest levels of distrust of the industry, suggesting that interaction and familiarity does not necessarily breed trust as one might expect.

13 Household financial stability

Q38. Which of these statements best applies to you?

	Total 2015	Tenure		Age			Social Grade		Previous surveys (all)		
		Rented	Non-rented	15-34	35-64	65+	AB	DE	2012	2013	2014
Base: All with either mains gas or electricity who are responsible for bills	*(1498) %*	*(458) %*	*(1040) %*	*(297) %*	*(774) %*	*(427) %*	*(338) %*	*(397) %*	*(1484) %*	*(1433) %*	*(1393) %*
I am/ We are keeping up with all the household bills without any difficulties	67	49	74	59	65	78	84	52	66	62	64
I am/ We are keeping up with all the household bills, but it is a struggle from time to time	25	37	21	31	28	15	13	36	23	27	25
I am/ We are keeping up with all the household bills, but it is a constant struggle	6	10	4	7	6	5	2	9	8	8	7
I am/ We are falling behind with some household bills	1	2	*	2	1	*	-	2	1	1	1
I am/ We are having real financial problems and have fallen behind with many bills	*	1	*	1	*	-	-	*	1	1	1

Source: Ipsos MORI

There are no significant changes this year in the overall figures for financial stability of energy customers.

APPENDICES

14 APPENDICES

14.1 Sample profile

QOG01. Do you have mains gas and/or mains electricity in your home?						
	2010	2011	2012	2013	2014	2015
Base: All respondents	*(1,992) %*	*(1,992) %*	*(1,956) %*	*(1,960) %*	*(1,971) %*	*(2,004) %*
Mains gas	86	85	80	83	89	88
Mains electricity	95	94	94	95	97	98
Neither/Don't know/Refused	5	3	3	2	1	1

Source: Ipsos MORI

QOG02. Are you responsible or jointly responsible for the gas or electricity bills in your household?						
	2010	2011	2012	2013	2014	2015
Base: All with mains gas or electricity	*(1,904) %*	*(1,925) %*	*(1,884) %*	*(1,911) %*	*(1,954) %*	*(1,986) %*
Yes	80	77	79	73	73	75
No	20	23	21	27	27	25

Source: Ipsos MORI

QOG04. Are you on a dual fuel deal?						
	2010	2011	2012	2013	2014	2015
Base: All with mains gas and electricity who are responsible for the bill and have same supplier for both (who comprise 91% of all with mains gas ***and*** *electricity who are responsible for bills (2015))*	*(1,144) %*	*(1,138) %*	*(1,066) %*	*(1,061) %*	*(1,098) %*	*(1,192) %*
Yes	72	74	72	75	73	73
No	16	15	15	19	20	20

Source: Ipsos MORI

14.2 Methods of payment

QOG08. How do you pay for the gas you use?

	2010	2011	2012	2013	2014	2015
Base: All those with mains gas who are responsible for the bill	*(1,369)* %	*(1,331)* %	*(1,232)* %	*(1,214)* %	*(1,227)* %	*(1,310)* %
Monthly direct debit	70	70	69	68	67	64
Quarterly direct debit	-	-	-	8	6	7
Pay quarterly in arrears/cheque, cash or card on receipt of bill	13	14	13	8	9	10
Prepayment meter	11	11	11	12	13	15
Fuel Direct	*	0	-	*	*	-
Weekly/fortnightly payment scheme	1	1	1	1	1	1
Payment card/book ad hoc	3	2	2	2	3	2
Other	1	1	2	*	*	*
Don't know	1	1	2	*	*	*

Source: Ipsos MORI

QOG10. How do you pay for the electricity you use?

	2010	2011	2012	2013	2014	2015
Base: All those with mains electricity who are responsible for the bill	*(1,540)* %	*(1,500)* %	*(1,461)* %	*(1,408)* %	*(1,383)* %	*(1,493)* %
Monthly direct debit	68	70	68	65	66	62
Quarterly direct debit	-	-	-	8	6	8
Pay quarterly in arrears/cheque, cash or card on receipt of bill	15	13	13	8	10	9
Prepayment meter	12	12	12	14	15	16
Fuel Direct	*	*	-	*	*	-
Weekly/fortnightly payment scheme	1	1	1	1	1	1
Payment card/book ad hoc	3	2	2	1	2	2
Other	*	2	2	1	*	*
Don't know	1	1	1	*	*	*

Source: Ipsos MORI

14.3 Online tariffs

QOG09. Are you on an online tariff, that is, a gas account that you have to manage over the internet?	2011	2012	2013	2014	2015
Base: All who have mains gas and are responsible for the bill	*(1,331)* %	*(1,232)* %	*(1,214)* %	*(1,227)* %	*(1,310)* %
Yes	21	22	27	31	32
No	75	73	71	67	66
Don't know	4	5	2	2	2

Source: Ipsos MORI

QOG11. Are you on an online tariff, that is, an electricity account that you have to manage over the internet?	2011	2012	2013	2014	2015
Base: All who have mains electricity and are responsible for the bill	*(1,500)* %	*(1,461)* %	*(1,408)* %	*(1,383)* %	*(1,493)* %
Yes	19	22	25	29	32
No	77	73	73	69	66
Don't know	3	5	2	2	2

Source: Ipsos MORI

14.4 Fixed term tariffs

QOG07. Are you on a fixed term tariff for gas, for electricity or for both? A fixed term tariff is a tariff that has a definite end date[15]	2013	2014	2015
Base: All who have mains gas or electricity who are responsible for bills	*(1,433)* %	*(1,393)* %	*(1,498)* %
Yes – gas	*2*	*1*	*1*
Yes – electricity	*10*	*8*	*8*
Yes - both	*41*	*47*	*48*
Yes – at least one fixed term tariff	53	56	57
No	39	36	35
Don't know	9	8	8

Source: Ipsos MORI

[15] Additional explanatory sentence added 2014

14.5 Amount spent on home energy

QOG06. Approximately how much do you spend on home energy, that is electricity and mains gas (if you have it)? (per year)

		Payment method				Social Grade					Previous survey (all)
		Monthly/ Quarterly Direct Debit (gas)	PPM (gas)	Monthly/ Quarterly Direct Debit (elec)	PPM (elec)	AB	C1	C2	D	E	2014
Base: All giving numerical answer	*(1,366) %*	*(830) %*	*(196) %*	*(940) %*	*(242) %*	*(297) %*	*(437) %*	*(260) %*	*(192) %*	*(180) %*	*(1,270) %*
0-£700	**15**	12	17	14	16	11	14	16	15	24	15
£701-£1,200	**47**	51	36	50	40	45	50	52	47	37	43
£1,201-£1,500	**14**	15	10	15	10	13	16	10	15	14	15
£1,501+	**24**	22	37	21	34	31	20	22	24	24	27
MEAN	**£1232**	£1240	£1340	£1217	£1298	£1342	£1198	£1181	£1222	£1161	£1276
Base: All with mains gas or electricity	*(1,498) %*	*(915) %*	*(209) %*	*(1037) %*	*(259) %*	*(338) %*	*(476) %*	*(287) %*	*(206) %*	*(191) %*	*(1,393) %*
Don't know	**9**	10	6	10	6	14	9	8	6	6	9

Source: Ipsos MORI

14.6 Current gas and electricity suppliers

QOG53. Who is your current electricity supplier?

	2013	2014	2015
Base: All who have mains electricity and responsible for bills	(1408) %	(1,383) %	(1,493) %
British Gas	27	26	23
E.ON	19	15	15
EDF	11	12	12
ScottishPower	11	12	9
npower	10	10	8
Southern Electric Ω			7
SSE (Scottish and Southern Energy)[16]	3	5	6
First Utility	1	2	3
Ovo	*	1	3
Swalec	2	2	2
Utility Warehouse	n/a	*	2
Scottish Hydro	2	1	1
Co-operative Energy	*	1	1
Sainsburys Energy	*	1	1
Ecotricity	1	*	1
Utilita Ω			1
Scottish Gas			1
Flow Energy Ω			*
Marks & Spencer Energy	*	1	*
Spark Energy	*	*	*
Extra Energy			*
Atlantic Energy			*
Ebico	*	*	*
Economy Energy Ω			*
Good Energy	*	-	*
Green Star Energy Ω			*
Isupply Ω			*
LoCo2 Energy Ω			*
Axis Telecom Ω			-
Gnergy Ω			-
Lorimer Power (Epower Supply) Ω			-
Extra Energy Ω			-
Other	*	*	*
Don't know	2	2	3

Source: Ipsos MORI

Ω New code 2015

[16] Asked as 'SSE' before 2015

QOG54. Who is your current gas supplier?	2013	2014	2015
Base: All who have mains gas and responsible for bills	(1214) %	(1,227) %	(1,310) %
British Gas	35	34	29
E.ON	16	13	11
ScottishPower	10	10	9
EDF	8	10	9
npower	10	9	9
Southern Electric Ω			6
SSE (Scottish and Southern Energy)[17]	3	4	6
First Utility	1	2	3
Ovo	*	1	3
Utility Warehouse	n/a	*	3
Better Energy Ω			1
Swalec	2	2	1
Scottish Hydro	2	1	1
Co-operative Energy	1	1	1
Sainsburys Energy	1	1	1
Scottish Gas			1
Utilita Ω			1
Extra Energy Ω			*
Flow Energy Ω			*
Marks & Spencer Energy	*	1	*
Spark Energy	*	1	*
Ebico	*	*	*
Economy Energy Ω			*
Ecotricity	1	*	*
Good Energy	-	*	*
Green Star Energy Ω			*
Atlantic Energy			*
Axis Telecom Ω			-
Daligas Ω			-
Gnergy Ω			-
Green Energy Ω			-
Zog Energy Ω			-
Other	*	*	*
Don't know	2	2	2

Source: Ipsos MORI

Ω New code 2015

[17] Asked as 'SSE' before 2015

14.7 Demographics

	2014 Weighted	2014 Unweighted	2015 Weighted	2015 Unweighted
Base: All respondents	*(1,973)* %	*(1,971)* %	*(2,004)* %	*(2,004)* %
Age				
15-34	32	33	32	30
35-64	47	45	47	47
65+	21	22	21	23
Social Group				
AB	26	20	27	21
C1	27	32	27	32
C2	22	22	22	19
DE	25	27	25	28
Region				
England	87	86	87	84
Wales	5	4	4	6
Scotland	8	9	9	10
Area				
Urban	27	29	30	38
Suburban	53	52	44	43
Rural	20	19	25	18
Internet Usage[18]				
Ever use[19]	89	87	87	85
Never use[20]	11	13	13	15
Ethnic Group				
White	87	85	87	84
BME	12	15	12	15
Tenure				
Rented	28	31	28	31
Not rented	72	69	72	69
Physical/ Mental Impairment (Base all: with gas or elec and resp for bills)				
Yes	13	15	16	14
No	87	85	84	81
Telephone Ownership				
Mobile only housuehold	-	-	17	18
Landline in household	-	-	77	76
Children				
Children in household under 5+ DE	-	-	5	5
Children in household	-	-	14	13
Other	-	-	86	87

Source: Ipsos MORI

[18] Internet Access prior to 2015 (included those with access who never used it)
[19] Yes prior to 2015
[20] No prior to 2015

14.8 Consumer typology in relation to engagement behaviour

Consumer typologies: Engagement

	Proportions of:					
	All energy customers		Gas customers		Electricity customers	
	2014	*2015*	*2014*	*2015*	*2014*	*2015*
	(1,393) %	*(1,498)* %	*(1,227)* %	*(1,310)* %	*(1,383)* %	*(1,493)* %
Disengaged – Never switched supplier and not switched tariff/payment method in 2014/15 (either fuel)	52	52	50	50	52	52
Partially engaged – Never switched supplier and switched tariff/payment method in 2014/15 (either fuel)	6	6	6	6	6	6
Lapsed engaged – Switched before 2014 and NEITHER switched supplier in 2014/15 nor switched tariff/payment method in 2014/15 (either fuel)	18	19	18	20	18	19
Recently engaged – Either switched supplier in 2014/15 OR (switched tariff/payment method in 2014/15 (either fuel) AND switched supplier before 2014 (either fuel))	25	23	26	25	25	23

Source: Ipsos MORI

The profile of the energy customer universe in terms of its level of engagement with the market, now in its third year of measurement, shows a high degree of stability, with no statistically significant change since 2014.

14.9 Attention paid to supplier communications, by typology

Q44/46/48/50. Summary Table – Attention paid to supplier communications by typology

	End of fixed term letter		Annual Statement		Bill or statement of account		Price increase notification letter	
Base: All	*All who received an end of fixed term letter in past year*		*All who received annual statement in last year*		*All who received a bill or statement of account in last year*		*All who received a price notification letter in past year*	
	2014	***2015***	*2014*	***2015***	*2014*	***2015***	*2014*	***2015***
Disengaged group	*(118) %*	***(145) %***	*(449) %*	***(491) %***	*(558) %*	***(563) %***	*(242) %*	***(175) %***
Read it in detail	50	42	45	34	40	32	37	28
Glanced over it or skim read it	38	48	44	51	46	50	52	58
Only saw what it was, but did not read it	9	8	6	8	8	10	7	9
Did not read it at all	3	2	5	7	5	8	4	5
Partially engaged group	*(24) %*	***(45) %***	*(63) %*	***(72) %***	*(73) %*	***(77) %***	*(28) %*	***(16) %***
Read it in detail	57	45	41	48	41	48	27	26
Glanced over it or skim read it	25	37	45	41	46	40	64	42
Only saw what it was, but did not read it	9	9	8	10	6	9	6	16
Did not read it at all	9	9	6	1	6	4	3	16
Lapsed engaged group	*(42) %*	***(64) %***	*(189) %*	***(225) %***	*(213) %*	***(250) %***	*(100) %*	***(75) %***
Read it in detail	55	49	39	39	43	39	25	48
Glanced over it or skim read it	32	40	51	55	48	49	63	49
Only saw what it was, but did not read it	9	8	4	4	5	7	8	2
Did not read it at all	4	3	6	2	5	5	5	1
Recently engaged group	*(102) %*	***(118) %***	*(234) %*	***(246) %***	*(296) %*	***(281) %***	*(73) %*	***(56) %***
Read it in detail	61	61	47	55	46	55	46	59
Glanced over it or skim read it	37	31	45	41	46	39	43	35
Only saw what it was, but did not read it	1	5	6	1	6	4	10	3
Did not read it at all	1	3	1	2	3	3	1	2

Source: Ipsos MORI

14.10 Effect of supplier communications by typology

Q45/47/49/51. Summary Table – Effect of supplier communications by typology

	Annual Statement				Bill or statement of account			
	2014		2015		2014		2015	
	Agree	Disagree	Agree	Disagree	Agree	Disagree	Agree	Disagree
	All who read in detail/ glanced over annual statement				*All who read in detail/ glanced over bill or statement of account*			
Disengaged group	*(391) %*		*(424) %*		*(478) %*		*(467) %*	
I understood the information	77	9	76	9	79	8	74	12
The information made me consider my energy options	37	34	29	39	32	40	25	49
I took action as a result of reading this information. For example, I looked into, or actually switched supplier, tariff or payment method	22	52	17	61	20	59	20	61
Partially engaged group	*(53) %*		*(64) %*		*(63) %*		*(68) %*	
I understood the information	79	6	87	5	86	10	80	8
The information made me consider my energy options	61	14	49	36	44	30	39	40
I took action as a result of reading this information. For example, I looked into, or actually switched supplier, tariff or payment method	41	32	34	48	34	41	28	50
Lapsed engaged group	*(168) %*		*(208) %*		*(193) %*		*(218) %*	
I understood the information	79	7	86	6	75	11	87	7
The information made me consider my energy options	36	37	42	36	34	38	35	42
I took action as a result of reading this information. For example, I looked into, or actually switched supplier, tariff or payment method	22	61	21	64	19	66	21	64
Recently engaged group	*(216) %*		*(235) %*		*(272) %*		*(262) %*	
I understood the information	83	7	86	7	84	6	86	7
The information made me consider my energy options	67	13	53	21	59	21	48	28
I took action as a result of reading this information. For example, I looked into, or actually switched supplier, tariff or payment method	50	31	47	34	49	33	47	38

Source: Ipsos MORI

Q45/47/49/51. Summary Table – Effect of supplier communications by typology

	Price increase notification letter				End of fixed term letter			
	2014		2015		2014		2015	
	Agree	Disagree	Agree	Disagree	Agree	Disagree	Agree	Disagree
	All who read in detail/ glanced over price increase notification letter				*All who read in detail/ glanced over end of fixed term letter*			
Disengaged group	*(211) %*		*(151) %*		*(103) %*		*(132) %*	
I understood the information	85	6	77	12	90	2	72	10
The information made me consider my energy options	37	44	34	44	44	27	37	30
I took action as a result of reading this information. For example, I looked into, or actually switched supplier, tariff or payment method	19	63	17	64	39	35	25	46
Partially engaged group	*(25) %*		*(12) %*		*(20) %*		*(38) %*	
I understood the information	72	8	94	-	80	-	87	12
The information made me consider my energy options	35	31	39	31	60	13	52	28
I took action as a result of reading this information. For example, I looked into, or actually switched supplier, tariff or payment method	31	36	16	26	76	13	41	45
Lapsed engaged group	*(87) %*		*(72) %*		*(38) %*		*(58) %*	
I understood the information	76	9	84	10	96	-	94	4
The information made me consider my energy options	38	43	41	41	60	23	43	44
I took action as a result of reading this information. For example, I looked into, or actually switched supplier, tariff or payment method	15	67	33	57	39	41	36	47
Recently engaged group	*(65) %*		*(52) %*		*(100) %*		*(107) %*	
I understood the information	78	11	90	4	89	5	94	2
The information made me consider my energy options	58	24	67	11	73	14	73	14
I took action as a result of reading this information. For example, I looked into, or actually switched supplier, tariff or payment method	44	33	66	27	63	19	69	21

Source: Ipsos MORI

QUESTIONNAIRE AND TOPLINE RESULTS

15 QUESTIONNAIRE AND TOPLINE RESULTS

Ofgem Switching Omnibus (Customer Engagement Tracker) Survey 2015

Topline Results

1. This topline shows the results for a face-to-face survey conducted among a representative quota sample of 2,004 residents of Great Britain in the period 6th-22nd March. Comparisons, where available, are shown with surveys in 2014, 2013, 2012 and 2011
2. Data are weighted by sex, age, social class, region and working status
3. Where results do not sum to 100, this may be due to multiple responses, computer rounding or the exclusion of don't knows/not stated
4. Results are based on all respondents unless otherwise stated (most based on all with gas or all with electricity)
5. An asterisk (*) represents a value of less than one half or one percent, but not zero

OG01. **Do you have mains gas and/or mains electricity in your home?**

	January '11 %	March '12 %	March '13 %	March '14 %	March '15
Yes – Mains electricity	94	94	95	97	98
Yes – Mains gas	85	80	83	89	88
No – Neither	1	2	2	1	1
Don't know	1	1	*	*	-
Refused	1	1	-	-	-

Base: All respondents (2,004)

OG02. **Are you responsible or jointly responsible for the gas or electricity bills in your household?**

	January '11 %	March '12 %	March '13 %	March '14 %	March '15 %
Yes	77	79	73	73	75
No	23	21	27	27	25

Base: All who have mains electricity and/or gas (1,986)

OG03. **Do you have the same supplier for both electricity and gas?**

	January '11 %	March '12 %	March '13 %	March '14 %	March '15 %
Yes	87	88	90	90	91
No	12	10	10	8	8
Don't know	2	2	1	1	1

Base: All who have both mains electricity and gas, and are responsible for bills (1,305)

OG04. **IF YES: Are you on a dual fuel deal?**

	January '11 %	March '12 %	March '13 %	March '14 %	March '15 %
Yes	74	72	75	73	73
No	15	15	19	20	20
Don't know	11	14	6	8	8

Base: All with same supplier for both fuels (1,192)

OG05. **In the last year, have you received information from your supplier about:**

		March '12 %	March '13 %	March '14 %	March '15 %
The name of the tariff you are on (your tariff is the pricing plan for the electricity and/or gas you use)?	Yes	48	54	59	59
	No	37	42	35	35
	Don't know	15	4	6	6
Any changes to your tariff?	Yes	40	40	43	39
	No	48	56	52	56
	Don't know	12	4	5	5
The forecast cost of your energy consumption over the coming year	Yes	44	47	52	57
	No	43	48	43	38
	Don't know	13	4	6	5

Base: All with gas or electricity who are responsible or jointly responsible for bills (1,498)

OG06. **Approximately how much do you spend on home energy, that is electricity and mains gas (if you have it)? You may answer per year, per month or per week if you prefer, but it needs to be on average for the whole year, including the winter. (Replies translated into annual figures)**

	March '12 %	March '13 %	March '14 %	March '15 %
0-£700	17	13	13	13
£701-£1200	40	42	39	43
£1201-£1500	12	13	13	12
£1501+	19	23	25	22
Don't know	13	9	9	9
Mean	£1,259	£1,258	£1,276	£1,232

Base: All responsible or jointly responsible for bills (1,498)

OG07. **Are you on a fixed term tariff for gas, for electricity or for both? A fixed term tariff is a tariff that has a definite end date**[21]

	March '12 %	March '13 %	March '14 %	March '15 %
Yes – gas		2	1	1
Yes – electricity	n/a	10	8	8
Yes (either)	38	53	56	57
Yes - both	n/a	41	47	48
No	42	39	36	35
Don't know	21	9	8	8

Base: All responsible or jointly responsible for bills (1,498)

OG08. **How do you pay for the gas you use?**

	January '11 %	March '12 %	March '13 %	March '14 %	March '15 %
Monthly Direct Debit	70	69	68	67	64
Quarterly Direct Debit	-	-	8	6	7
Pay by cheque, cash or card on receipt of your bill	14	13	8	9	10
Prepayment Meter	11	11	12	13	15
Fuel Direct (where a set amount is deducted from your benefits before you receive them)	-	-	*	*	-
Weekly/Fortnightly payment scheme	1	1	1	1	1
Payment card/book that I use whenever I choose (Ad Hoc)	2	2	2	3	2
Other	1	2	*	*	*
Don't know	1	2	*	*	*

Base: All with mains gas and responsible for bill (1,310)

OG09. **Are you on an online tariff, that is, a gas account that you have to manage over the internet?**

	January '11 %	March '12 %	March '13 %	March '14 %	March '15 %
Yes	21	22	27	31	32
No	75	73	71	67	66
Don't know	4	5	2	2	2

Base: All those who have mains gas in their home and are responsible for the bill (1,310)

[21] In 2013 questionnaire, question read: 'Are you on a fixed term tariff for gas, for electricity or for both?'

OG10. **How do you pay for the electricity you use?**

	January '11 %	March '12 %	March '13 %	March '14 %	March '15 %
Monthly Direct Debit	70	68	65	66	62
Quarterly Direct Debit	-	-	8	6	8
Pay by cheque, cash or card on receipt of your bill	13	13	8	10	9
Prepayment Meter	12	12	14	15	16
Fuel Direct (where a set amount is deducted from your benefits before you receive them)	*	-	*	*	-
Weekly/Fortnightly payment scheme	1	1	1	1	1
Payment card/book that I use whenever I choose (Ad Hoc)	2	2	1	2	2
Other	2	2	1	*	*
Don't know	1	1	*	*	*

Base: All with mains electricity and responsible for bill (1,493)

OG11. **Are you on an online tariff, that is, an electricity account you have to manage over the internet?**

	January '11 %	March '12 %	March '13 %	March '14 %	March '15 %
Yes	19	22	25	29	32
No	77	73	73	69	66
Don't know	3	5	2	2	2

Base: All with mains electricity and responsible for bill (1,493)

OG12a. **Did you switch your gas supplier in 2014?**

	January '11 %	March '12 %	March '13 %	March '14 %	March '15 %
Yes	15	13	11	13	12
No/Don't know	85	87	89	87	88

Base: All with mains gas and responsible for bill (1,310)

OG12b. **And have you switched your gas supplier so far in 2015?**

	March '12 %	March '13 %	March '14 %	March '15
Yes	4	3	4	4
No/Don't know	96	97	96	96

Base: All with mains gas and responsible for bill (1,310)

OG13. **Did you switch your gas supplier at any time before 2014?**

	January '11 %	March '12 %	March '13 %	March '14 %	March '15 %
Yes	30	27	28	30	32
No/ Don't know	70	73	72	70	68

Base: All who did not switch gas supplier during 2014/2015 (1,103)

OG14. **How many times have you <u>ever</u> switched your gas supplier?**

	January '11 %	March '12 %	March '13 %	March '14 %	March '15 %
Once	56	44	38	37	45
Twice	21	19	25	26	22
Three times ("or more" - before 2011)	12	21	19	18	18
Four times or more	11	15	17	20	15

Base: All who have ever switched gas supplier (548)

OG15a. **Even though you stayed with the same gas supplier in 2014 and so far in 2015, did you change the tariff you have with them or the method by which you pay them?**

	January '11 %	March '12 %	March '13 %	March '14 %	March '15 %
Yes – changed tariff		9	11	12	11
Yes – changed payment method		4	5	4	3
Yes (either)	12	12	16	15	13
No	84	88*	85*	85*	87*
Don't Know	4				

Base: All who have not switched gas supplier in 2014/15 (1,103) *No/DK combined in 2012, 2013, 2014 & 2015

OG15b. **When you switched gas supplier in 2014 or 2015, did you also change your payment method at the same time?**

	March '13 %	March '14 %	March '15 %
Yes	15	9	13
No/Don't know	85	91	86

Base: All those who switched gas supplier during 2014/2015 (207)

OG15c. **What method of payment for gas did you change from?**

	March ‘12 %	March ‘13 %	March ‘14 %	March ‘15 %
Monthly Direct Debit	6	6	5	6
Quarterly Direct Debit	n/a	6	8	4
Pay by cheque, cash or card on receipt of your bill	10	12	6	9
Prepayment Meter	3	1	1	5
Fuel Direct (where a set amount is deducted from your benefits before you receive them)	-	-	-	-
Weekly/Fortnightly payment scheme	1	1	-	-
Payment card/book that I use whenever I choose (Ad Hoc)	-	-	1	2
Other (Please specify)	1	2	2	2
Did not change payment method	70	71	76	70
Don’t know	8	-	-	-

Base: All those who have changed tariff or payment method for gas in past year (175)

OG16a. **Did you switch your electricity supplier in 2014?**

	January ‘11 %	March ‘12 %	March ‘13 %	March ‘14 %	March ‘15 %
Yes	17	14	12	13	13
No/Don’t know	83	86	88	87	87

Base: All who have mains electricity and are responsible for bill (1,493)

OG16b. **And have you switched your electricity supplier so far in 2015?**

	March ‘12 %	March ‘13 %	March ‘14 %	March ‘15 %
Yes	3	2	4	4
No/Don’t know	97	98	96	96

Base: All who have mains electricity and are responsible for bill (1,493)

OG17. **Did you switch your electricity supplier at any time before 2014?**

	January ‘11 %	March ‘12 %	March ‘13 %	March ‘14 %	March ‘15 %
Yes	28	24	29	27	28
No	72	76	71	73	72

Base: All who did not switch electricity supplier in 2014/15 (1,254)

OG18. **How many times have you ever switched your electricity supplier?**

	January '11 %	March '12 %	March '13 %	March '14 %	March '15 %
Once	56	44	42	35	43
Twice	20	22	23	26	23
Three times ("or more" -before 2011)	14	20	19	18	17
Four times or more	10	15	16	22	16

Base: All who have ever switched electricity supplier (573)

OG19a. **Even though you stayed with the same electricity supplier in 2014 and so far in 2015, did you change the tariff you have with them or the method by which you pay them?**

	January '11 %	March '12 %	March '13 %	March '14 %	March '15 %
Yes – changed tariff		10	10	10	9
Yes – changed payment method		3	6	3	3
Yes (either)	10	12	16	13	11
No	86	88*	85*	87*	89*
Don't Know	3				

Base: All who have not switched electricity supplier in 2014/15 (1,254) *No/DK combined in 2012, 2013, 2014 & 2015

OG19b. **When you switched electricity supplier in 2014 or 2015, did you also change your payment method at the same time?**[22]

	March '13 %	March '14 %	March '15 %
Yes	16	12	12
No/Don't know	84	88	88

Base: All who have switched electricity supplier in 2014/15 (239)

[22] New question introduced in 2013

OG19c. **What method of payment for electricity did you change from?**

	March '12 %	March '13 %	March '14 %	March '15 %
Monthly Direct Debit	4	6	5	6
Quarterly Direct Debit[23]		6	7	4
Pay by cheque, cash or card on receipt of your bill	14	15	9	9
Prepayment Meter	2	3	2	5
Fuel Direct (where a set amount is deducted from your benefits before you receive them)	-	-	-	-
Weekly/Fortnightly payment scheme	-	*	-	-
Payment card/book that I use whenever I choose (Ad Hoc)	1	-	1	-
Other (Please specify)	1	2	1	1
Did not change payment method	74	66	75	75
Don't know	4	-	-	1

Base: All those who have changed tariff or payment method for electricity in past year (184)

Summary 1

	March '10 %	January '11 %	March '12 %	March '13 %	March '14 %	March '15 %
Ever switched gas supplier	43	41	37	38	42	43
Ever switched electricity supplier	42	40	35	38	39	39

Base: All who have each fuel and pay bills (1310 gas, 1493 electricity)

Summary 2

	March '10 %	January '11 %	March '12 %	March '13 %	March '14 %	March '15 %
Switched either fuel in last year*	19	18	15	14	14	14
Switched either fuel ever	46	43	38	40	42	43

Base: All with either fuel and pay bills (1498) *last year = 2014

[23] New code introduced in 2013

OG20. **Did you know it was possible to change to a different tariff or method of payment with your current supplier?**

	March '12 %	March '13 %	March '14 %	March '15 %
Yes – knew possible to change tariff*		34	23	18
Yes - knew possible to change method of payment*		5	5	4
Yes – knew possible to change both*		43	53	59
Yes (either)	68	82	81	81
No	28	17	18	19
Don't know	5	1	1	1

Base: All those who have not changed gas or electricity tariff or payment method (1,310) *before 2013, 'Yes' option was not segmented 3 ways

OG21. **Did you know it was possible to switch to a different gas or electricity supplier?**

	January '11 %	March '12 %	March '13 %	March '14 %	March '15 %
Yes (either)	87	82	84	84	83
Yes – knew possible to switch both		79	77	78	76
Yes- electricity but not gas		2	2	2	2
Yes- gas but not electricity		1	5	3	5
No	10	16	16	15	17
Don't know	3	3	1	1	*

Base: All who have never switched either (875)

OG22. **For each of the items here could you please say which of them, if any, apply to you?**

	January '11	March '12	March '13	March '14	March '15
	%	%	%	%	%
I'm happy with my current supplier/s	77	78	55	56	50
I've checked prices of other suppliers and I think I'm on the best deal[24]	13	9	12	11	10
I don't think there is any difference between the suppliers to make switching worthwhile[25]	20	13	17	21	20
Switching is a hassle	22	20	27	30	30
I am unsure about where to get information to help me make a good choice	4	2	6	4	5
I am in debt with my current supplier/s so don't think I can switch	1	1	2	2	2
I live in rented accommodation and don't think my landlord will allow me to switch[26]	3	3	3	4	5
I wouldn't know how to switch even if I wanted to	2	3	4	3	5
My supplier has told me I can't switch	n/a	1	2	2	2

Base: All who have never switched either (875)

[24] 2011 wording: ...and I think I'm on a good deal
[25] 2011 wording: I don't think there is much difference...
[26] 2011 wording: I live in a rented house and I don't think my landlord would allow me to switch

OG23. **Thinking about the last time you switched your gas supplier, what was the main trigger causing you to switch?**

	January '11 %	March '12 %	March '13 %	March '14 %	March '15 %
Believed new supplier was cheaper/to save money	79	76	75	70	72
Believed new supplier offered better customer service	7	5	6	4	7
Believed new supplier offered better benefits (e.g. loyalty points)		2	1	*	1
Wanted a dual fuel package	4	5	4	3	4
Wanted a fixed-price deal	1	2	2	6	2
Wanted a "greener" tariff [27]	1	*	1	1	1
Wanted an online tariff	1	0	*	*	1
Written communication from your supplier	0	*	-	-	*
Moved home[28]	0	3	6	10	9
Poor service	0	1	*	-	*
Was on a meter	-	*	*	*	*
Salesman calling at house	-	-	1	1	*
Dispute with supplier	-	-	*	*	1
Other	1	1	2	2	1
Don't know	2	1	1	1	1

Base: All who have gas and are responsible for bill and have ever switched gas supplier (548)

[27] 2011 wording: Wanted to switch to a "greener" environmentally friendly tariff or supplier
[28] New code introduced in 2013

OG24. **Thinking about the last time you switched gas supplier, how did you find out about the deals offered by the supplier you switched to? [unprompted]**

	January '11 %	March '12 %	March '13 %	March '14 %	March '15 %
Supplier/representative knocked at my door[29]	31	23	19	13	10
Used an on-line/website price comparison service (e.g. USwitch, Money Supermarket)	21	34	35	40	37
New supplier phoned me[30]	7	6	5	5	6
I spoke to a salesperson in street/shopping centre/public place	7	10	7	7	6
A friend or family member told me about it	6	6	6	5	9
I saw an advert	4	2	3	5	2
I phoned a comparison service	7	4	4	4	4
I looked at the websites of more than one supplier	3	3	7	5	5
I rang them only	3	4	4	3	6
I looked at the supplier's own website only	4	3	3	2	4
I rang them and other suppliers	2	3	3	3	5
Written communication or marketing material from your supplier[31]	-	1	1	2	2
Through a collective (group) switching campaign organised by a third party (e.g. council/charity/housing association, Big Switch, Ready to Switch, Big Deal, Huge Switch etc)[32]	-	-	1	2	1
Other	5	4	7	5	7
Don't know	4	4	2	3	2

Base: All ever switched gas supplier (548)

[29] 2011 wording: They knocked on my door
[30] 2011 wording: They phoned me
[31] 2012 wording: Written communication or marketing material
[32] New statement introduced in 2013. 'Ready to Switch, Big Deal, Huge Switch' added in 2015

OG25. **Thinking about the last time you switched gas supplier, how did you switch? [unprompted]**

	January '11 %	March '12 %	March '13 %	March '14 %	March '15 %
On-line price comparison service	16	27	26	31	27
Telephone price comparison service	2	5	4	3	3
Phoning supplier	25	24	29	27	29
Through the supplier's website	4	4	5	7	10
Through a salesperson who knocked at my door	29	24	19	15	11
Through a salesperson in the street/shopping centre/other public place	6	7	7	5	5
Written communications [33]	1	1	2	1	2
Through a collective (group) switching campaign organised by a third party (e.g. council/charity/housing association, Big Switch, Ready to Switch, Big Deal, Huge Switch etc)[34]	-	-	1	2	1
Other	2	7	5	6	8
Don't know	6	3	3	2	2

Base: All ever switched gas supplier (548)

OG26. **To the best of your knowledge, do you feel that you are now paying less than you would have if you hadn't switched?**

	January '11 %	March '12 %	March '13 %	March '14 %	March '15 %
Yes	62	72	68	69	82
No	12	17	19	20	14
Don't know/Not sure	26	11	13*	10	5

Base: All who ever switched gas supplier to save money (384) *2013, 2014 & 2015 code 'Don't know' only

OG27a. **How much do you agree or disagree with the following statements:**
I found it easy to decide which deal to switch my gas to

	January '11 %	March '12 %	March '13 %	March '14 %	March '15 %
Agree strongly	32	34	34	30	36
Tend to agree	45	38	35	38	40
Neither agree nor disagree	8	9	11	13	12
Tend to disagree	10	11	13	14	8
Disagree strongly	3	6	6	5	4
Don't know	2	2	*	*	-

Base: All with gas who have ever switched (548)

[33] 2011 wording: By letter/mail
[34] New statement introduced in 2013. 'Ready to Switch, Big Deal, Huge Switch' added in 2015

OG27b. ***I am confident that I fully understand the key features of the deal I switched to***

	January '11 %	March '12 %	March '13 %	March '14 %	March '15 %
Agree strongly	35	37	38	37	38
Tend to agree	41	37	34	39	41
Neither agree nor disagree	11	7	10	10	11
Tend to disagree	8	13	14	10	7
Disagree strongly	4	6	4	4	3
Don't know	1	1	-	*	*

Base: All with gas who have ever switched (548)

OG27c. ***I would be confident that if I switched again, I would make the right choice for me***

	March '12 %	March '13 %	March '14 %	March '15 %
Agree strongly	38	38	35	42
Tend to agree	34	32	36	37
Neither agree nor disagree	9	15	15	10
Tend to disagree	12	11	9	7
Disagree strongly	6	4	4	3
Don't know	2	*	1	*

Base: All with gas who have ever switched (548)

OG28. **Thinking about the last time you switched your electricity supplier, what was the main trigger causing you to switch?**

	January '11 %	March '12 %	March '13 %	March '14 %	March '15 %
Believed new supplier was cheaper/to save money	77	77	76	72	72
Believed new supplier offered better customer service	7	5	5	4	6
Wanted a dual fuel package	5	5	4	4	4
Wanted a fixed-price deal	2	1	2	6	2
Wanted a greener tariff [35]	2	1	1	1	2
Believed new supplier offered better benefits (e.g. Loyalty points)	-	2	1	*	1
Written communication from your supplier	-	*	*	*	1
Wanted an online tariff	*	*	*	*	*
Moved home[36]	-	3	5	8	8
Poor service	-	1	1	-	*
New tenant	-	*	-	-	-
Was on a meter	-	*	*	*	1
Dispute with supplier	-	*	1	-	1
Salesman calling at house	-	-	1	1	1
Recommendation #	-	-	-	-	1
Other	1	1	2	2	*
No answer	-	1	*	1	*
Don't know	2	2	*	1	*

Base: All who have electricity and are responsible for bill and have ever switched electricity supplier (573) # Codes added post-fieldwork

[35] 2011 wording: Wanted to switch to a "greener" environmentally friendly tariff or supplier
[36] New statement introduced in 2013

OG29. **Thinking about the last time you switched electricity supplier, how did you find out about the deals offered by the supplier you switched to? [unprompted]**

	January '11 %	March '12 %	March '13 %	March '14 %	March '15 %
Used an on-line/website price comparison service (e.g. USwitch, Money Supermarket)	24	31	37	40	40
Phoned a comparison service	5	5	4	4	5
Looked at the supplier's own website only	4	4	2	4	2
Looked at the websites of more than one supplier	2	3	5	5	5
Supplier representative knocked at my door[37]	29	22	17	12	10
Spoke to a salesperson in street/shopping centre/public place	7	7	7	8	7
New supplier phoned me[38]	9	8	4	5	6
I saw an advert	5	5	3	3	2
I rang them only	4	4	5	4	7
I rang them and other suppliers	2	3	4	3	4
A friend or family member told me about it	6	5	6	6	7
Written communication or marketing material from your supplier[39]	-	1	3	2	1
Through a collective (group) switching campaign organised by a third party (e.g. council/charity/housing association, Big Switch, Ready to Switch, Big Deal, Huge Switch etc)[40]			1	2	2
Other	5	3	7	4	5
Don't know	4	3	2	2	2

Base: All who have ever switched electricity supplier (573)

[37] 2011 wording: They knocked at my door
[38] 2011 wording: They phoned me
[39] 2012 wording: Written communication or marketing material
[40] New statement introduced in 2013. 'Ready to Switch, Big Deal, Huge Switch' added in 2015

OG30. **Thinking about the last time you switched electricity supplier, how did you switch? [unprompted]**

	January '11 %	March '12 %	March '13 %	March '14 %	March '15 %
Online price comparison site	16	25	26	31	29
Telephone price comparison service	2	5	3	3	3
Phoning supplier	28	30	29	27	29
Through supplier's website	5	4	6	9	10
Through salesperson who knocked on my door	28	23	17	14	11
Through a salesperson in the street/shopping centre/other public place	5	7	7	5	6
Written communications[41]	1	2	3	2	1
Through a collective (group) switching campaign organised by a third party (e.g. council/charity/housing association, Big Switch, Ready to Switch, Big Deal, Huge Switch etc)[42]			1	1	1
Other	-	4	5	6	7
Don't know	6	2	2	2	2

Base: All those who have ever switched electricity supplier (573)

OG31. **To the best of your knowledge, do you feel that you are now paying less than you would have if you hadn't switched?**

	January '11 %	March '12 %	March '13 %	March '14 %	March '15 %
Yes	64	73	70	73	81
No	11	13	20	19	15
Don't know/Not sure	25	14	10	8	4

Base: All who have ever switched electricity supplier to save money (404)

OG32a. **How much do you agree or disagree with the following statements:**
I found it easy to decide which deal to switch my electricity to

	January '11 %	March '12 %	March '13 %	March '14 %	March '15 %
Agree strongly	31	39	38	35	38
Tend to agree	46	36	30	37	36
Neither agree nor disagree	8	7	12	10	13
Tend to disagree	8	10	14	12	9
Disagree strongly	3	7	5	6	3
Don't know	2	2	*	*	*

Base: All with electricity who have ever switched (573)

[41] 2011 wording: By letter/mail, 2012 wording: written communication
[42] New statement introduced in 2013. 'Ready to Switch, Big Deal, Huge Switch' added in 2015

OG32b. ***I am confident that I fully understand the key features of the deal I switched to***

	January '11 %	March '12 %	March '13 %	March '14 %	March '15 %
Agree strongly	34	38	40	39	41
Tend to agree	44	36	33	37	38
Neither agree nor disagree	9	7	10	8	11
Tend to disagree	8	11	13	10	6
Disagree strongly	4	6	3	6	4
Don't know	2	2	-	*	*

Base: All with electricity who have ever switched (573)

OG32c. ***I would be confident that if I switched again, I would make the right choice for me***

	March '12 %	March '13 %	March '14 %	March '15 %
Agree strongly	40	39	38	45
Tend to agree	34	33	38	35
Neither agree nor disagree	8	13	9	10
Tend to disagree	12	10	10	7
Disagree strongly	6	5	4	4
Don't know	2	-	1	*

Base: All with electricity who have ever switched (573)

OG33. **Thinking about the last time you changed your tariff or payment method (without switching supplier), what was the main trigger causing you to change it?**

	March '12 %	March '13 %	March '14 %	March '15 %
Believed new tariff or method was cheaper/to save money	62	58	58	55
Believed new tariff or method offered better benefits, for example loyalty points or a maintenance contract	7	6	2	2
Wanted a dual fuel package	3	4	4	3
Wanted a fixed price deal	5	8	6	8
Wanted a green tariff	2	1	*	2
Wanted an online tariff	1	1	2	*
Written communication or marketing materials from your supplier	2	1	1	2
Moved home[43]	1	7	9	8
Convenience	1	3	-	2
Contract/fixed rate ended	-	-	5	5
Other	6	3	5	4
Don't know	7	5	4	2

Base: All who have gas or electricity and have changed tariff or payment method in 2014/2015 (188)

[43] New statement introduced in 2013

OG34. **How did you find out about the tariff or payment method you changed to?**

	March '12 %	March '13 %	March '14 %	March '15 %
Used an online/website price comparison service	26	24	28	24
Phoned a comparison service	7	4	6	8
Looked at supplier's own website only	4	4	7	9
Looked at websites of more than one supplier	5	2	5	3
Supplier representative knocked at my door	12	8	6	5
Spoke to a salesperson in the street/shopping centre/other public place	5	3	3	4
They phoned me	8	8	6	6
I saw an advert	2	4	3	2
I rang them only	7	17	8	8
I rang them and other suppliers	2	5	5	5
A friend or family member told me about it	3	4	3	4
Written communication or marketing material from your supplier[44]	13	7	13	12
Other	5	8	10	13
Don't know	7	5	3	1

Base: All who have gas or electricity and have changed tariff or payment method in 2014/2015 (188)

OG35. **Thinking about the last time you changed your tariff or payment method with your supplier, how did you change it?**

	March '12 %	March '13 %	March '14 %	March '15 %
Online price comparison service	17	20	21	17
Telephone price comparison service	7	5	6	6
Phoning supplier	34	42	38	38
Through the supplier's website	7	4	8	13
Through a salesperson who knocked at my door	11	10	8	6
Through a salesperson in the street/shopping centre/other public place	3	3	2	2
Written communications	6	4	7	3
Other	8	7	7	13
Don't know	7	4	4	2

Base: All who have gas or electricity and have changed tariff or payment method in 2014/2015 (188)

[44] 2012 wording: Written communication or marketing material

OG36. **What would be the minimum amount of money you would have to save per year in order for it to encourage you to switch your gas or electricity supplier? Just approximately (Converted to annual figures)**

	March '12	March '13	March '14	March '15
	%	%	%	%
Not about saving money – other factors more important	15	12	16	12
0-£50	11	14	12	16
£51-£100	14	16	17	14
£101-£200	13	13	12	14
£201+	10	7	9	13
Refused	2	2	2	2
Don't know	35	36	32	29
Mean	£167	£152	£158	£169
Median	-	£94	£99	£99

Base: All who have never switched either gas or electricity (875)

OG37. **On the last occasion, when you decided to switch your supplier how much did you expect to save per year? Just approximately. (Converted to annual figures)**

	March '12	March '13	March '14	March '15
	%	%	%	%
Not about saving money – other factors more important	8	11	11	12
0-£50	7	8	9	6
£51-£100	15	17	16	15
£101-£200	18	17	17	25
£201+	10	7	10	13
Refused	-	*	*	*
Don't know	42	40	37	29
Mean	£173	£195	£167	£178
Median	-	£100	£111	£144

Base: All who have ever switched either gas or electricity (623)

OG38. **Which of these statements best applies to you?**

	January '11 %	March '12 %	March '13 %	March '14 %	March '15 %
I am/we are keeping up with all the household bills without any difficulties	62	66	62	64	67
I am/we are keeping up with all the household bills, but it is a struggle from time to time	25	23	27	25	25
I am/we are keeping up with all the household bills, but it is a constant struggle	8	8	8	7	6
I am/we are falling behind with some household bills	1	1	1	1	1
I am/we are having real financial problems and have fallen behind with many bills	1	1	1	1	*
Don't know	2	2	*	1	1

Base: All with mains electricity or gas and responsible for bills (1498)

OG39. **Using the answers here, how easy or difficult do you believe it is to compare different tariffs for electricity or gas?[45]**

	March '13 %	March '14 %	March '15 %
Very easy	13	13	14
Fairly easy	23	29	30
Neither easy nor difficult	24	21	23
Fairly difficult	22	20	21
Very difficult	15	12	9
Don't know	3	4	3

Base: All with mains electricity or gas and responsible for bills (1498)

45 New question introduced in 2013

OG40. **What is it that makes them difficult to compare?**[46]

	March '13	March '14	March '15
	%	%	%
Difficult to understand/complicated/not clear	31	26	28
Too many tariffs/ multiple rates/ structures/ choices	23	16	12
Hard to compare like for like	11	-	-
Not standardised information/ difficult deals/ prices in different formats	8	-	-
Hard to compare like for like/ Not standardised information/ difficult deals/ prices in different formats*	-	21	13
Too much jargon/ technical language/ terminology used	8	9	9
Other	8	6	5
Don't know	6	7	5

Base: All those who answered 'very/fairly difficult' at OG39 (438) *In 2013, 'hard to compare like for like' was a separate code to 'not standardised information/difficult deals/prices in different formats.' In 2014 and 2015, these codes have been combined

OG41. **Thinking about the number of different tariffs available to you, in your view, are there the right number of energy tariffs available, or are there too many tariffs or too few tariffs?**[47]

	March '13	March '14	March '15
	%	%	%
The right number of tariffs	20	21	23
Too many tariffs	62	62	57
Too few tariffs	5	4	5
Don't know	14	12	15

Base: All those with mains electricity or gas and responsible for bills (1498)

OG42. **To what extent would you say you understand the range of different energy tariffs available to you?**[48]

	March '13	March '14	March '15
	%	%	%
Completely	10	9	10
A fair amount	35	41	38
Not very much	35	34	33
Not at all	19	13	15
Don't know	2	3	3

Base: All with either mains gas or electricity who are responsible for bills (1498)

[46] Ibid (Main answer codes only)
[47] New question introduced in 2013
[48] Ibid

OG43. **Please tell me if you recall receiving any of the following in the last year? You may have received these via post or email.**[49]

A. An annual statement (A yearly statement containing details about your own energy tariff and energy use)

	March '13	March '14	March '15
	%	%	%
Yes	63	67	71
No	34	30	26
Don't know	4	3	3

Base: All those with mains electricity or gas and responsible for bills (1498)

B. At least one bill or statement of account

	March '13	March '14	March '15
	%	%	%
Yes	80	83	80
No	18	15	19
Don't know	1	2	1

Base: All those with mains electricity or gas and responsible for bills (1498)

C. A price increase notification letter (A letter informing you that how much you pay for your energy will be increasing and outlining your options as a consumer.)

	March '13	March '14	March '15
	%	%	%
Yes	62	59	43
No	34	36	49
Don't know	5	5	8

Base: All not on fixed term contract for both electricity and gas (794)

D. An end of fixed term letter (A letter informing you your fixed term tariff is coming to an end)

	March '13	March '14	March '15
	%	%	%
Yes	32	38	43
No	66	59	55
Don't know	2	3	2

Base: All on fixed term for at least one fuel (848)

[49] New question introduced in 2013

OG44. **Thinking about the last annual statement you received, in how much detail did you look at it?**[50]

	March '13	March '14	March '15
	%	%	%
Read it in detail	40	44	41
Glanced over it or skim read it	49	46	49
Only saw what it was, but did not read it	7	6	6
Did not read it at all	5	4	4

Base: All received annual statement in the last year (1034)

OG45. Thinking about last **annual statement** you received, to what extent do you agree or disagree with the following statements?[51]

			Strongly agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Strongly disagree	No opinion/ don't know
			%	%	%	%	%	%
A)	I understood the information	2015	33	49	11	5	2	*
		2014	35	44	13	6	1	*
		2013	34	43	14	7	2	-
B)	The information made me consider my energy options	2015	13	26	27	21	12	*
		2014	14	32	26	18	10	1
		2013	15	28	25	18	14	-
C)	I took action as a result of reading this information. For example I looked into, or actually switched supplier, tariff or payment method	2015	11	16	19	26	28	*
		2014	13	17	22	22	25	*
		2013	12	16	20	23	29	-

Base: All read in detail /glanced over annual statement (788) 2013, (828) 2014, (931) 2015

OG46. Thinking about the last **bill or statement of account** you received, in how much detail did you look at it?[52]

	March '13	March '14	March '15
	%	%	%
Read it in detail	40	42	40
Glanced over it or skim read it	46	47	46
Only saw what it was, but did not read it	8	7	8
Did not read it at all	6	4	6

Base: All received bill or statement of account in last year (1171)

50 Ibid
51 New question introduced in 2013
52 Ibid

OG47. Thinking about last **bill or statement of account** you received, to what extent do you agree or disagree with the following statements?[53]

			Strongly agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Strongly disagree	No opinion/ don't know
			%	%	%	%	%	%
A)	I understood the information	2015	34	46	10	7	2	-
		2014	35	45	11	6	2	*
		2013	36	41	13	7	2	-
B)	The information made me consider my energy options	2015	11	23	24	25	17	-
		2014	14	26	26	20	13	*
		2013	16	23	24	19	19	-
C)	Other than paying the bill, I took action as a result of reading this information. For example I looked into, or actually switched supplier, tariff or payment method	2015	9	18	17	29	26	*
		2014	12	16	19	27	25	*
		2013	12	15	19	22	32	-

Base: All read in detail /glanced over bill/statement of account (969) 2013, (1,006) 2014, (1,015) 2015

OG48. Thinking about the last **price increase notification letter** you received, in how much detail did you look at it?[54]

	March '13	March '14	March '15
	%	%	%
Read it in detail	39	35	39
Glanced over it or skim read it	47	53	51
Only saw what it was, but did not read it	8	8	6
Did not read it at all	5	4	4

Base: All received price notification letter in past year (322)

[53] New question introduced in 2013
[54] Ibid

OG49. Thinking about last **price increase notification letter** you received, to what extent do you agree or disagree with the following statements?[55]

			Strongly agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Strongly disagree	No opinion/ don't know
			%	%	%	%	%	%
A)	I understood the information	2015	32	50	9	6	3	-
		2014	35	46	11	6	1	*
		2013	37	42	11	8	2	-
B)	The information made me consider my energy options	2015	11	32	21	19	17	-
		2014	13	28	19	23	17	-
		2013	15	24	21	21	20	-
C)	I took action as a result of reading this information. For example I looked into, or actually switched supplier, tariff or payment method	2015	11	20	16	24	29	-
		2014	8	15	20	29	28	*
		2013	11	14	18	24	33	-

Base: All read in detail /glanced over price notification letter (436) 2013, (388) 2014, (287) 2015

OG50. Thinking about the last **end of fixed term letter** you received, in how much detail did you look at it?[56]

	March '13	March '14	March '15
	%	%	%
Read it in detail	53	55	50
Glanced over it or skim read it	37	36	40
Only saw what it was, but did not read it	7	6	7
Did not read it at all	3	3	3

Base: All received end of fixed term letter in past year (372)

55 New question introduced in 2013
56 Ibid

OG51. Thinking about last **end of fixed term letter** you received, to what extent do you agree or disagree with the following statements?[57]

			Strongly agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Strongly disagree	No opinion/ don't know
			%	%	%	%	%	%
A)	I understood the information	2015	40	45	9	5	2	-
		2014	41	49	7	2	1	-
		2013	39	42	13	6	*	-
B)	The information made me consider my energy options	2015	26	27	21	17	10	-
		2014	27	32	21	15	5	-
		2013	27	33	20	9	12	-
C)	I took action as a result of reading this information. For example I looked into, or actually switched supplier, tariff or payment method	2015	24	19	19	23	15	-
		2014	27	24	21	21	7	-
		2013	27	21	23	14	14	-

Base: All read in detail /glanced over end of fixed term letter (220) 2013, (261) 2014, (335) 2015

OG52. Using the words here, please tell me the extent to which you trust or distrust energy suppliers to be **open and transparent in their dealings with consumers**?[58]

	March '12	March '13	March '14	March '15
	%	%	%	%
Trust completely	6	5	4	5
Tend to trust	28	25	24	30
Neither trust nor distrust	26	27	27	28
Tend to distrust	26	26	29	24
Distrust completely	13	18	15	13
Don't know	2	*	*	*

Base: All with mains electricity or gas and responsible for bills (1498)

[57] New question introduced in 2013
[58] Ibid

OG53. **Who is your current electricity supplier?**[59]

	March '13 %	March '14 %	March '15 %
Axis Telecom Ω			-
British Gas	27	26	23
Co-operative Energy	*	1	1
E.ON	19	15	15
Ebico	*	*	*
Economy Energy Ω			*
Ecotricity	1	*	1
EDF	11	12	12
Extra Energy Ω			*
First Utility	1	2	3
Flow Energy Ω			*
Good Energy	*	-	*
Gnergy Ω			-
Green Star Energy Ω			*
Isupply			*
LoCo2 Energy			*
Lorimer Power (Epower Supply)			-
Marks & Spencer Energy	*	1	*
Npower	10	10	8
Ovo	*	1	3
Sainsburys Energy	*	1	1
Scottish Hydro	2	1	1
ScottishPower	11	12	9
Southern Electric Ω			7
Southern Energy*	7	5	
Spark Energy	*	*	*
SSE (Scottish and Southern Energy)[60]	3	5	6
Swalec	2	2	2
Utility Warehouse[61]	n/a	*	2
Utilita Ω			1
Atlantic Energy #			*
Scottish Gas #			1
Other	*	*	*
Don't know	2	2	3

Base: All with mains electricity and responsible for bills (1493)
*Not asked in 2015 Ω New supplier introduced in 2015 # Supplier added post-fieldwork

[59] New question introduced in 2013
[60] Asked as 'SSE' before 2015
[61] New supplier introduced in 2014

OG54. **Who is your current gas supplier?**[62]

	March '13 %	March '14 %	March '15 %
Axis Telecom Ω			-
Better Energy Ω			1
British Gas	35	34	29
E.ON	16	13	11
Npower	10	9	9
ScottishPower	10	10	9
Southern Electric Ω			6
EDF	8	10	9
Extra Energy Ω			*
Southern Energy*	6	5	
SSE (Scottish and Southern Energy)[63]	3	4	6
Scottish Hydro	2	1	1
Swalec	2	2	1
Co-operative Energy	1	1	1
Daligas Ω			-
Ecotricity	1	*	*
First Utility	1	2	3
Flow Energy Ω			*
Gnergy Ω			-
Marks & Spencer Energy	*	1	*
Ebico	*	*	*
Economy Energy Ω			*
Ovo	*	1	3
Sainsburys Energy	1	1	1
Spark Energy	*	1	*
Good Energy	-	*	*
Green Energy Ω			-
Green Star Energy Ω			*
Utility Warehouse Ω	n/a	*	3
Utilita Ω			1
Zog Energy Ω			-
Atlantic Energy #			*
Scottish Gas #			1
Other	*	*	*
Don't know	2	2	2

Base: All with mains gas and responsible for bills (1310)
*Not asked in 2015 Ω New supplier introduced in 2015 # Supplier added post-fieldwork

[62] New question introduced in 2013
[63] Asked as 'SSE' before 2015

OG55. **Do you have any long term physical or mental impairment which limits your daily activities or the work you can do?[64]**

	March '13	March '14	March '15
	%	%	%
Yes	15	13	16
No	85	87	84

Base: All with mains electricity or gas and responsible for bills (1498)

[64] New question introduced in 2013

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