Ipsos MORI
Social Research Institute

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Consumer experiences of the Energy Market – Wave 2

Report for Energy UK

Research undertaken by Ipsos MORI

Contents

1 Executive summary

This report explores bill payers' opinions of their energy supplier - the extent to which they trust them and find them easy to deal with - and their experiences of switching supplier. The report is based on results from a survey conducted for the second time. The first was conducted in February and March 2014.

1.1 Introduction

1.1.1 Research purpose

Energy UK, on behalf of its members, commissioned Ipsos MORI to understand consumer opinions of, and engagement with, the retail energy market. The aim of the project was to update the findings of a previous wave of this research carried out in February – March 2014 by Ipsos MORI, to see whether consumers' experiences and opinions have changed over the last six months.

Both waves have sought to investigate consumer satisfaction and engagement with the energy market by using four key metrics:

- **Ease of switching –** how easy customers find it easy to switch from one energy supplier to another
- **Customer Effort Score** - how easy customers find it to deal with their supplier
- **Customer Trust Score** - the level of trust consumers have in their supplier
- **Net Promoter Score** - the likelihood that customers will recommend their energy supplier

1.1.2 Methodology

The research was conducted using Capibus, Ipsos MORI's weekly omnibus survey (full details are provided in Chapter 3). Interviewing for the first wave was conducted across two weeks (referred to as "Week 1" and "Week 2"), between 21st February and 10th March 2014. The same approach was used for the second wave, with fieldwork occurring between 29th August and 11th September 2014.

The majority of the findings discussed in this report are based on two subsets of interviewed **bill payers** from Week 1 (who are either solely or jointly responsible for paying the electricity and/or gas bills in their household); and **recent 'switchers'** from Weeks 1 and 2 (bill payers who have also switched, or tried to switch, their energy supplier in the previous 12 months).

Respondents in both subsets have mains electricity and know who their electricity supplier is or, if they do not have an electricity supplier or know who it is, have mains gas and know who their gas supplier is. As a result, most respondents were asked about their electricity supplier (c.98%).

1.1.3 Interpreting results

The key metric questions on trust, customer effort and on likelihood to recommend, all use 0 to 10 scales. To aid interpretation of these results, responses were grouped together (see Table 1.1). **Please note that the Net Promoter Score uses a different grouping to the other scales.** For more details see Section 3.3.

Table 1.1 – Guide to 0 to 10 scale analysis

	Scores	Label	Other Details
Customer Effort Score	0 to 3	Difficult	This scale is also used in the report for other questions related to how easy or difficult respondents find dealing with energy suppliers.
	4 to 6	Neither easy nor difficult	
	7 to 10	Easy	
Customer Trust Score	0 to 3	Distrust	This scale is also used in the report for other questions related to what extent respondents trust their energy suppliers.
	4 to 6	Neither trust nor distrust	
	7 to 10	Trust	
Net Promoter Score[1]	0 to 6	Detractors	An overall Net Promoter Score is calculated as Promoters minus Detractors.
	7 to 8	Passives	
	9 to 10	Promoters	

1.2 Key findings

There has been no change in the proportion of customers who have tried switching their supplier over the previous year, and views on how easy or difficult the process is felt to be, have remained unchanged. However, there has been an improvement on a number of measures, including the ease with which customers find it dealing with their supplier overall and trust in suppliers to provide a service that meets customers' needs.

Specific aspects of the service that customers are happier with include; the ease of finding clear information on accounts, and of getting complaints resolved; as well as trust to receive value for money, and to have complaints dealt with fairly. Consequently, a greater proportion of customers would recommend their supplier now than was the case six months ago. Views about other service issues remain consistent.

It may be the case that there is an element of seasonality in the changes seen in the results. For example, for many customers, bills will be lower in the summer months (i.e. those preceding this most recent wave of the research) than they are in the winter. Customers may also engage less frequently with their supplier during the summer period.

It should also be noted that the period prior to this most recent wave was far quieter, in terms of media coverage, for the energy industry than was the case in late 2013 and the beginning of 2014. It may be the case that the results of the first wave of this research were impacted by the ongoing media coverage of the political debate surrounding a possible freeze in energy prices, and a reform of the energy market. A second 'annual' wave of the research, conducted during the winter, would need to be conducted to assess whether there are seasonal effects of when the research is conducted.

A more detailed summary of the changes between Wave 1 and 2 are provided below.

[1] The combined scores for the Net Promoter Score are grouped differently than those used for the Trust and Customer Effort Scores. This is because the scale for the Net Promoter Score is designed to enable comparisons to be made between different organisations and companies. More information can be found at: http://www.netpromotersystem.com

1.2.1 Ease of switching supplier

There has been no change in the proportion of customers who have tried switching their supplier in the previous 12 month period (15%). Furthermore, most customers continue to find the process easy. 74% of bill payers who have either tried to switch, or did switch, their energy supplier in the last twelve months found it easy to switch their account to a new supplier. One in eight (12%) found the process difficult.

1.2.2 Ease of dealing with suppliers

Overall, more bill payers find the experience of dealing with their energy supplier easy than in Wave 1. When asked to think about their experiences with their energy supplier overall, more than six in ten (63%) bill payers now say it is easy – up from 59% in Wave 1. However, those who find it difficult (7%) has not changed significantly, whereas those who find it neither easy nor difficult has fallen (34% to 29%). As such, though there has been a positive change in the proportion who find it easy, the small minority that find it difficult remains steady.

In terms of different aspects of ease of service (of those who have or currently use the service), the two service issues that customers find easier to deal with are the same as 6 months ago:

- 75% of bill payers find it easy to provide a meter reading to their energy supplier (6% find it difficult)
- 79% bill payers find it easy to make a bill payment (5% find it difficult).

Neither of these results has changed since Wave 1.

However, two aspects of the service asked about have seen improvements in the last six months:

- 66% of bill payers say it is easy to find clear information about their account, such as their tariff or bill - a statistically significant increase from 61%. 11% find it difficult.
- 54% of bill payers find it easy to get a complaint resolved - a statistically significant increase from 44%. 13% find it difficult.

1.2.3 Trust in energy suppliers

Overall, bill payers tend to trust their energy supplier to a greater extent than in Wave 1. When asked to think about the overall service their energy supplier provides, 59% of bill payers trust their energy supplier to provide them with a service that meets their needs – up from 55% in Wave 1. One in eleven (9%) distrust their supplier, in-line with the result in Wave 1 (10%). The remainder (32%) are neutral.

However, there is no change in customer's views of their supplier compared to other suppliers. As in Wave 1, most bill payers state that they trust their energy supplier about the same as they would other energy suppliers (68%). A quarter (26%) of bill payers state that their energy supplier is more trustworthy, with very few (4%) believing their energy supplier is less trustworthy than other energy suppliers.

There are two aspects of the service received for which customer trust has increased:

- 45% of bill payers now say they trust their energy supplier to provide them with value of money - a statistically significant increase from Wave 1 (40%). 17% distrust them to do so.

- 54% of bill payers now say they trust their energy supplier to deal with their complaints fairly – a statistically significant increase from Wave 1 (44%). 17% distrust them to do so.

Views about accurate billing and openness and transparency are consistent with Wave 1:

- 59% of bill payers trust their energy supplier to provide them with an accurate bill (10% distrust them to).

- 50% of bill payers trust their energy supplier to be open and transparent in their dealings with them (10% distrust them to be)

1.2.4 Likelihood to recommend supplier

Bill payers were asked *"How likely would you be to recommend [named energy supplier] to friends, relatives or colleagues?"* The Net Promoter Score is a simple and widely used calculation derived from this standardised question, where the scores on a 0 to 10 scale are grouped into "Detractors" (score 0-6), "Passives" (score 7-8) and "Promoters" (score 9-10). The Net Promoter Score is then calculated by detracting the number of "Promoters" from the number who are "Detractors".[2]

More bill payers would recommend their energy supplier than in Wave 1. More than a fifth (21%) are Promoters of their supplier, up from 16% in Wave 1. There has not be a significant shift in those who are Passives (27% in both waves), but there has been a significant fall in those who are Detractors (57% to 52%). As such, the Net Promoter Score has improved from -40% to -30%.

1.2.5 Summary of results

Table 1.2 provides an overview of how results have changed between the two waves of this research. Wave 2 results are highlighted in green (or red) if they are significantly higher (or lower) than the Wave 1 results. If there is no highlighting of the wave 2 result, this indicates that the results are consistent between both waves.

[2] It is important to note that the Promoter Score is calculated on this basis (i.e. 9 and 10) because it is unlikely that those giving a lower score are realistically likely to speak to their friends and family about their supplier. This is a different grouping of scores than used for the questions on trust and customer effort (7 to10 are categorised as 'easy' or 'trusting'). The latter groupings are used as they are reflective of the more positive end of the response scale.

Table 1.2 – Summary of differences between Wave 1 and Wave 2

		Wave 1	Wave 2
Switching results	% who have switched	16%	15%
	% of switchers (completed and uncompleted) who found switching easy	74%	74%
Results for ease of dealing with suppliers	% find it easy dealing with supplier overall (Customer Effort Score)	59%	63%
	% find it easy to provide meter readings	72%	75%
	% find it easy to find clear information about their account	61%	66%
	% find it easy to make a bill payment	78%	79%
	% find it easy to get a compliant resolved	44%	54%
Results for trust in suppliers	% trust supplier to provide service that meets their needs (Customer Trust Score)	55%	59%
	% trust supplier to provide value for money	40%	45%
	% trust supplier to provide accurate bills	59%	59%
	% trust suppliers to deal with complaints fairly	46%	50%
	% trust supplier to be open and transparent	48%	50%
	% find supplier more trustworthy compared to other suppliers	26%	26%
Net promoter score	% who are Promoters of their supplier	16%	21%

2 Introduction

This chapter provides an overview of the purpose of the research.

2.1 Background to the research

The energy market has rarely been out of the media in the last two years. Domestic energy supply has become a highly political issue, with questions raised about the extent to which the market is operating effectively for consumers. This type of debate is susceptible to hyperbole and there is a danger that the views and experiences of consumers can be obscured.

Energy UK is the trade association for the energy industry.[3] On behalf of its members it commissioned Ipsos MORI to investigate consumers' experiences of the energy retail market. The aim of the project was to update the findings of a previous study carried out in February – March 2014 ("Wave 1"), to see whether consumers' experiences and opinions have changed over this period of time. The findings of "Wave 2" will help to understand consumer perceptions of their energy supplier with the aim of understanding how the service can be improved, but also see if these have changed since Wave 1.

2.2 Research purpose

The overall aim of the research is to understand consumer opinions of, and engagement with, the retail energy market. Additionally, the second wave sought to measure if opinions and engagement have changed.

This research investigates consumer satisfaction and engagement with the energy market through monitoring how four key metrics perform over time:

1 **Ease of switching:** The prevalence of switching energy supplier and, for those consumers that have tried to do so, how easy they found the process.

   - Ofgem's Customer Engagement Tracking Survey provides an accurate account of many aspects of supplier switching in the energy market.[4] This research additionally aims to understand how easy consumers who have chosen to switch supplier found the process to be (specifically of transferring accounts), as a smooth switch indicates a good customer experience.

2 **Customer Effort Score:** How easy customers find it to deal with their supplier.

   - This is a market indicator specifically designed for this research. It aims to provide a measure of how easy suppliers make it for customers to deal with them. The degree to which services are convenient for customers can be considered an important aspect of good customer service.

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[3] Energy UK is the trade association for the energy industry, with over 80 companies as members that together cover the broad range of energy providers and suppliers and include companies of all sizes working in all forms of gas and electricity supply and energy networks.
[4] The 2014 Ofgem Customer Engagement Tracking Survey can be found at: https://www.ofgem.gov.uk/publications-and-updates/customer-engagement-energy-market-tracking-survey-2014

3 Customer Trust Score: The level of trust consumers have in suppliers.

- The regard in which energy suppliers are held is a relevant measure to help understand the health of the market because it affects the extent to which consumers are confident and willing to engage with their supplier and the wider market.

4 Net Promoter Score: The regard in which energy suppliers are held.

- The likelihood to recommend an organisation or company to friends, family or relatives is considered to be a simple, but effective indicator to encompass all the aspects that cover an organisation's or company's customer service. The Net Promoter Score provides a key metric with which to monitor the regard in which energy suppliers are held by their customers.[5]

[5] More information on Net Promoter Score can be found at: http://www.netpromotersystem.com

3 Methodology

This chapter summarises the research methodology, provides a guide to the interpretation of the findings and a brief guide to the scores used throughout the report.

3.1 Survey method

3.1.1 Data collection

Both waves of the research have been conducted using Capibus, Ipsos MORI's weekly omnibus survey of people aged 15+ across Great Britain.[6] All interviews were carried out in-home using computer-assisted personal interviewing (CAPI). In each wave, two weeks of research were conducted:

1. The first week included all survey questions (Q1 to Q13).
2. The second week repeated selected questions of the first Week (Q1 to Q7 on switching experiences) to boost sample sizes.

The dates of fieldwork and the numbers of interviews competed are shown in Table 3.1.

Table 3.1 – Fieldwork dates and number of interviews completed.

	Wave 1	Wave 2
Week 1	21st February to 3rd March 2014 (1,982 interviews).	29th August to 9th September 2014 (1,978 interviews)
Week 2	28th February to 10th March 2014 (2,022 interviews).	5th September to 11th September 2014 (2,021 interviews)

3.1.2 Weighting

The results detailed in this report have been weighted to the known Great Britain population profile. Capibus uses a 'rim weighting' system which weights to National Readership Survey (NRS) defined profiles for age, social grade[7], region, tenure, ethnicity and working status - within sex.[8],

3.1.3 Survey respondents

The nationally representative sample in Wave 1 comprised of a total of 4,004 interviews, with Wave 2 consisting of 3,999 interviews. However, this research focuses on two sub-sets of these samples, namely:

[6] Further information can be found at:
http://www.ipsos-mori.com/researchareas/omnibusservices/capibus.aspx
[7] Social grade is a socio-demographic classification system. Further information can be found at
http://www.ipsos-mori.com/DownloadPublication/1285_MediaCT_thoughtpiece_Social_Grade_July09_V3_WEB.pdf
[8] More information on the National Readership Survey (NRS) can be found at: http://www.nrs.co.uk/

- For questions 8 to 13 (trust, customer effort and net promoter) - **Bill payers from Week 1 (1,427 in Wave 1; 1,420 in Wave 2):** These respondents are either solely or jointly responsible for paying the electricity and/or gas bills in their household. These respondents also have mains electricity and know who their electricity supplier is or, if they do not have an electricity supplier or know who it is, have mains gas and know who their gas supplier is.

- For questions 5 to 7 (switching) - **recent 'switchers' from Weeks 1 and 2 (511 in Wave 1; 487 in Wave 2):** These respondents are either solely or jointly responsible for paying the electricity and/or gas bills in their household, and have also switched, or tried to switch, their energy supplier in the previous 12 months.

3.2 Interpreting the findings

3.2.1 Statistical reliability

Because a sample rather than the entire population of Great Britain was interviewed, the percentage results are subject to sampling tolerances. This means that we cannot be certain that the figures obtained are exactly those we would have if everybody had been interviewed (the 'true' values).

We can, however, predict the variation between the sample results and the 'true' values from knowledge of the size of the samples on which the results are based and the number of times that a particular answer is given.

Table 3.2 illustrates the predicted range for different sample sizes and percentage results at the '95% confidence interval' – i.e. the confidence with which we can make this prediction is 95%, that is, the chances are 95 in 100 that the 'true' value will fall within a specified range.

The tolerances that may apply in this report are given in Table 3.2. Strictly speaking the margins of error shown here apply only to random samples; though in practice good quality quota sampling has been found to be as accurate.

Table 3.2 – Overall statistical reliability

Size of sample on which survey result is based	Approximate sampling tolerances applicable to percentages at or near these levels		
	10% or 90%	30% or 70%	50%
Wave 1: 1,427 bill payers	±2%	±2%	±3%
Wave 1: 511 recent 'switchers'	±3%	±4%	±4%
Wave 2: 1,420 bill payers	±2%	±2%	±3%
Wave 2: 487 recent 'switchers'	±3%	±4%	±4%

For example, with a sample of 1,420 people where 30% give a particular answer, the chances are 19 in 20 that the 'true' value (which would have been obtained if the whole population had been interviewed) will fall within the range of plus or minus 2 percentage points from the sample result.

Similar tolerances also apply when comparing one group of customers to another or between different waves. Throughout the report, only differences in subgroups that are statistically significant are referred to. Table 3.4 illustrates the differences in results that must be seen, when comparing different sub-groups or between different waves, to be statistically significant.

Table 3.3 – Difference in results required for subgroup results, or results between waves, to be statistically significant

Size of sample on which survey result is based	Approximate sampling tolerances applicable to percentages at or near these levels		
	10% or 90%	30% or 70%	50%
All bill payers Wave 1 (1,427) vs. All bill payers Wave 2 (1,420)	±2%	±3%	±4%
All recent 'switchers' Wave 1 (511) vs. All recent 'switchers' Wave 2 (487)	±4%	±6%	±6%

3.2.2 Rounding

Figures presented in tables and charts may not always add to 100%, either because of multiple answers being allowed, or because of rounding.

3.3 0 to 10 Scale questions

The key metric questions on trust, customer effort and on likelihood to recommend, all use 0 to 10 scales, where respondents use a response scale of whole numbers between 0 and 10. This design was selected over worded scales to provide greater granularity in results, but also to ensure a consistent scale could be used throughout the questionnaire. The full questionnaire can be found in Appendix 2.

To aid interpretation of these results, the scores are discussed in the report in two ways. The first is the mean score, which is an average of the scores given by respondents for a particular question. The second is to group responses together. Table 3.4 shows how these have been grouped and the way they are described within the report.

Table 3.4 – Score groups and labelling

	Scores	Label	Other Details
Customer Effort Score	0 to 3	Difficult	This scale is also used in the report for other questions related to how easy or difficult respondents find dealing with energy suppliers.
	4 to 6	Neither easy nor difficult	
	7 to 10	Easy	
Customer Trust Score	0 to 3	Distrust	This scale is also used in the report for other questions related to what extent respondents trust their energy suppliers.
	4 to 6	Neither trust nor distrust	
	7 to 10	Trust	
Net Promoter Score[9]	0 to 6	Detractors	An overall Net Promoter Score is calculated as Promoters minus Detractors.
	7 to 8	Passives	
	9 to 10	Promoters	

3.4 Energy supplier asked about

For the key metric questions on trust, customer effort and on likelihood to recommend, respondents were asked in reference to (one of) their named energy supplier(s) (e.g. "*And thinking about your overall experiences of them, how easy or difficult do you find dealing with British Gas?*"). Almost all (98%) respondents answered the questions in terms of their electricity supplier (if they were connected to mains electricity and could name their electricity supplier). If respondents could not name their electricity supplier, but could name their gas supplier, they were asked about their gas supplier. Those who could name neither their electricity nor gas supplier were not asked these questions.

[9] The combined scores for the Net Promoter Score are grouped differently than those used for the Trust and Customer Effort Scores. This is because the scale for the Net Promoter Score is designed to enable comparisons to be made between different organisations and companies. More information can be found at: http://www.netpromotersystem.com

4 Ease of switching supplier

This chapter covers customer experiences of switching, or trying to switch, energy supplier; namely how easy they found the process.

4.1 Introduction

The questions within this chapter were asked of respondents who have mains gas and/or electricity and have responsibility for paying for their energy bills. These questions were repeated in both Week 1 and Week 2, as a means to boost sample sizes. As such, the results in this chapter are based on results from both Weeks, unlike the remainder of the report which are solely based on Week 1 data.

4.2 Incidence of switching in the past 12 months

The proportion of bill payers who have switched energy supplier in the past twelve months has remained steady. Nearly one in seven (15%) bill payers have switched, which is consistent with Wave 1 (16%). Just two per cent have tried, but did not end up switching, while the remainder have not attempted to switch (83%).

Due to issues of question comparability (the Ofgem survey asks about switching of electricity and gas separately), these results cannot be compared to prevalence of switching covered in Ofgem's Customer Engagement Tracking Survey.[10]

4.2.1 Sub-group differences

As seen in Wave 1, particular groups of customers are more likely to have switched supplier, namely: those aged 15 to 64 (vs. aged 65 and over); those in social grades A or B (vs. D or E); those with access to the internet (vs. those without); and those with formal qualifications (vs. those without).

4.3 Ease of switching

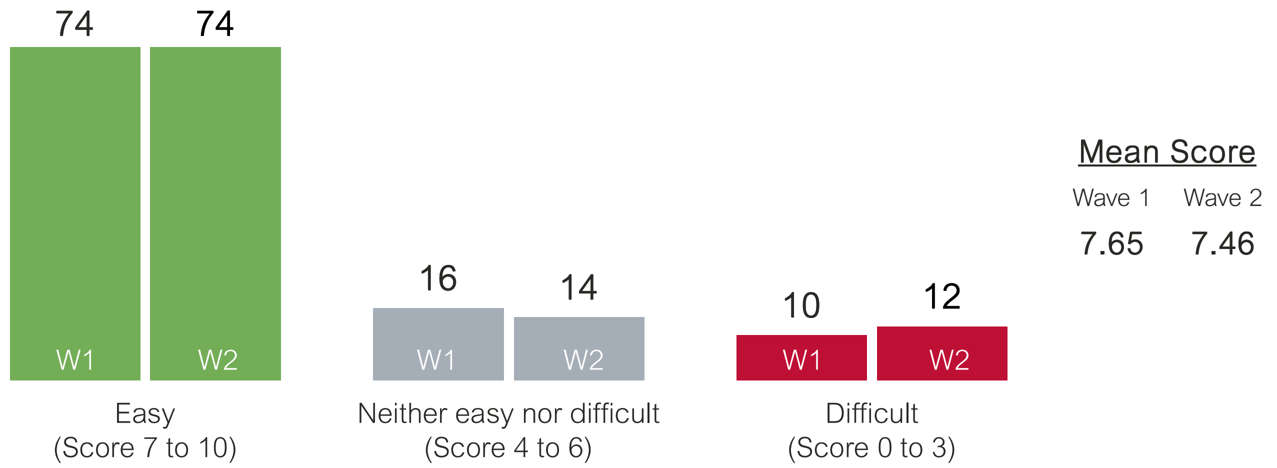
The ease with which bill payers have switched supplier is consistent with Wave 1, so remains high. Nearly three quarters (74%) of bill payers who have either tried to switch, or did switch, their energy supplier in the last twelve months found it easy to switch their account to a new supplier (Figure 4.1). Just one in eight (12%) found it difficult, with the remainder finding it neither easy nor difficult (14%).

[10] The 2014 Ofgem Customer Engagement Tracking Survey can be found at: https://www.ofgem.gov.uk/publications-and-updates/customer-engagement-energy-market-tracking-survey-2014

Figure 4.1 – Ease of switching

Thinking about the last time you [switched/tried to switch] your [electricity/gas/gas or electricity] supplier, overall, how easy or difficult would you say it was to [try to] switch your account to a new supplier? When answering, please think about how easy or difficult the process was of [trying to switch/switching] the account rather than deciding who to switch to in the first place.

Please answer on a scale of 0 to 10, where 0 was extremely difficult and 10 was extremely easy. (%)



*If Wave 2 results are significantly higher (or lower) than Wave 1 results they are highlighted in green (red).

Base: All with mains gas and/or electricity, have responsibility for paying energy bills and who have either switched or tried to switch their energy supplier in the last 12 months. (Unweighted base size: Wave 1 – 511; Wave 2 - 487).

No change is seen in the opinions of those who have successfully switched supplier in the last twelve months. Around eight in ten (77%) found it easy to switch their account to a new supplier in Wave 2 (77% in Wave 1). Very few found it difficult (Wave 1 - 7%; Wave 2 – 10%). Those who tried to switch but did not complete the switching process, found the process more difficult (26% vs 10% who successfully switched).

4.3.1 Sub-group differences

There are no differences between different sub-groups of customer.

5 Ease of dealing with energy suppliers

This chapter covers how easy or difficult bill payers find it to deal with their energy supplier in regards to: providing meter readings; finding clear information about their account; making a bill payment; and getting a complaint resolved. The chapter finishes by discussing an overall *Customer Effort Score*.

5.1 Introduction

When asked about how easy or difficult they find it dealing with their energy supplier, respondents were given a "Not Applicable" option to account for occasions where bill payers have not had experience of these elements of the service. Those who selected "Not Applicable" (ranging from 6% to 37% of respondents, depending on the service issue) have been removed from the base for all questions discussed in this chapter.

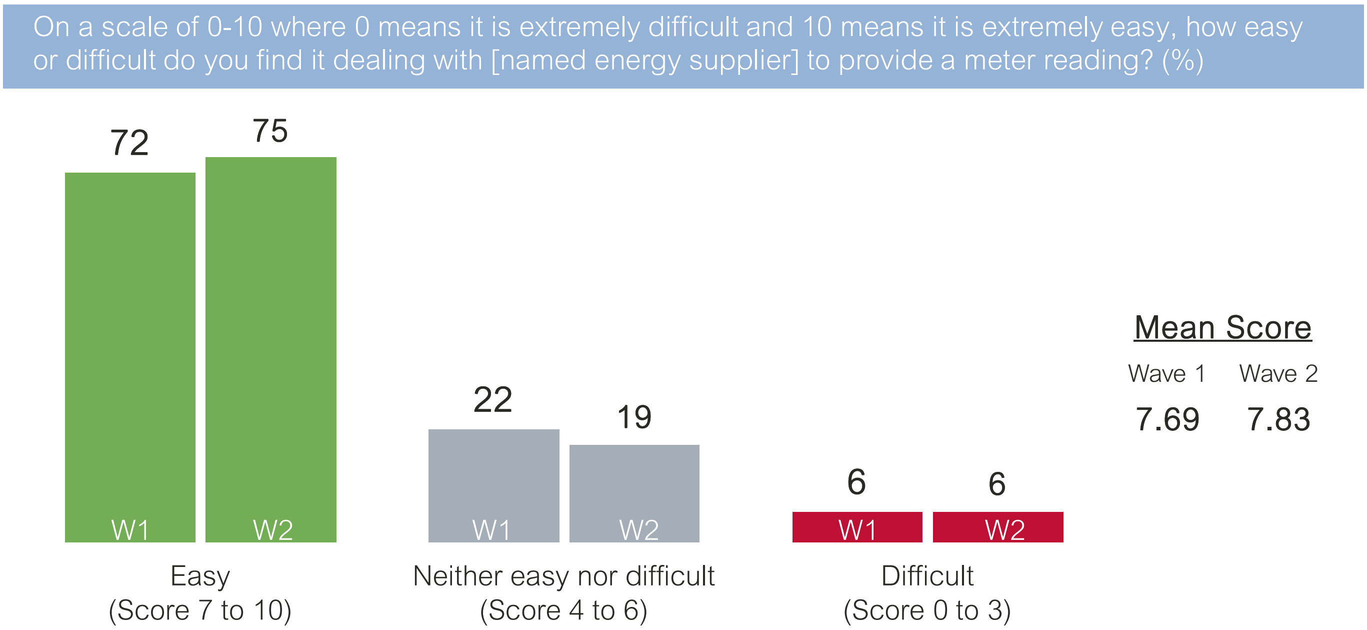
Most respondents (98%) were asked about their electricity supplier in the questions in Chapter 5. This is also the case in Chapters 6 and 7. If they could not name their electricity supplier, but could name their gas supplier, they were asked about their gas supplier. More information can be found in Section 3.4.

5.2 Ease of providing meter readings

Three quarters (75%) of bill payers find it easy to provide a meter reading to their energy supplier. Only around one in twenty (6%) find it difficult to do this, with one in five (19%) saying they find it neither easy nor difficult (Figure 5.1).[11] In all, the mean score given by bill payers is 7.83. There has been no change in these results since Wave 1.

[11] 8% of bill payers reported that they have not had experience of providing a meter reading to their supplier.

Figure 5.1 – Ease of providing meter readings



*If Wave 2 results are significantly higher (or lower) than Wave 1 results they are highlighted in green (red).

Base: All who have responsibility for paying energy bills who either have mains electricity and know who their electricity supplier is OR (if don't have electricity supplier or know who it is) have mains gas and know who their gas supplier is. (ALL APPLICABLE) (Unweighted base size: Wave 1 - 1,323 ; Wave 2 - 1,316).

5.2.1 Sub-group differences

There are a number of different groups of bill payers who are significantly more likely to find it easy to provide a meter reading to their energy supplier (give a score of 7 to 10). As the sub-group differences are similar for the other three customer effort statements discussed in this chapter, the sub-group differences for all issues relating to customer effort are presented in Section 5.6. The subgroup differences seen in Wave 2 are consistent with those seen in Wave 1.

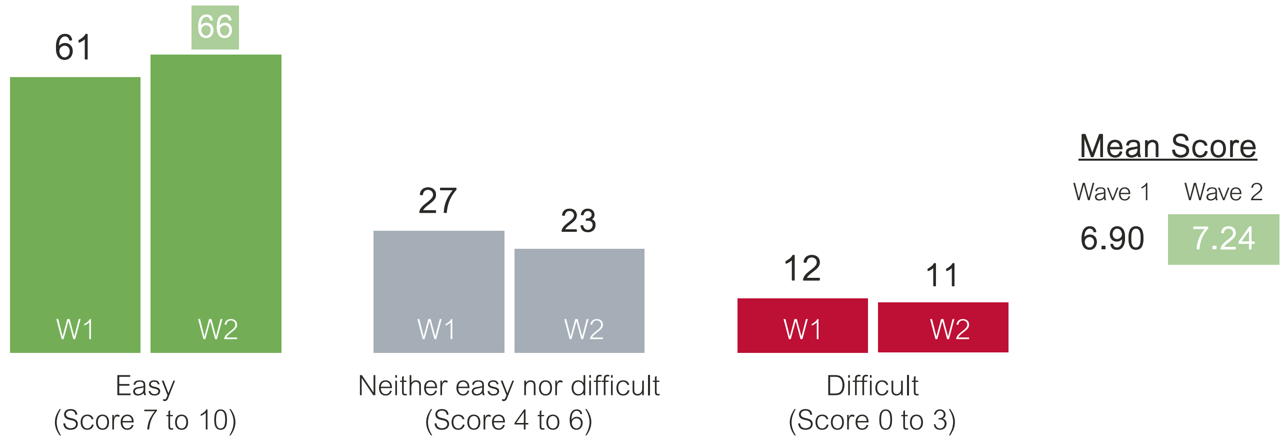
5.3 Ease of finding clear information about accounts

More bill payers find it easy to locate clear information about their account than in Wave 1. Two thirds (66%) of bill payers now say it is easy to find clear information about their account, such as their tariff or bill – up from 61% in Wave 1. Around one in nine (11%) find it difficult to access this information, while one in four (23%) say they find it neither easy nor difficult (Figure 5.2).[12] In line with these positive increases, the mean score given by bill payers has risen from 6.90 to 7.24.

[12] 6% of bill payers reported that they have not had experience of finding clear information about their account.

Figure 5.2 – Ease of finding clear information about accounts

On a scale of 0-10 where 0 means it is extremely difficult and 10 means it is extremely easy, how easy or difficult do you find it dealing with [named energy supplier] to find clear information about your account? (%)



*If Wave 2 results are significantly higher (or lower) than Wave 1 results they are highlighted in green (red).

Base: All who have responsibility for paying energy bills who either have mains electricity and know who their electricity supplier is OR (if don't have electricity supplier or know who it is) have mains gas and know who their gas supplier is. (ALL APPLICABLE) (Unweighted base size: Wave 1 - 1,343 ; Wave 2 - 1,339).

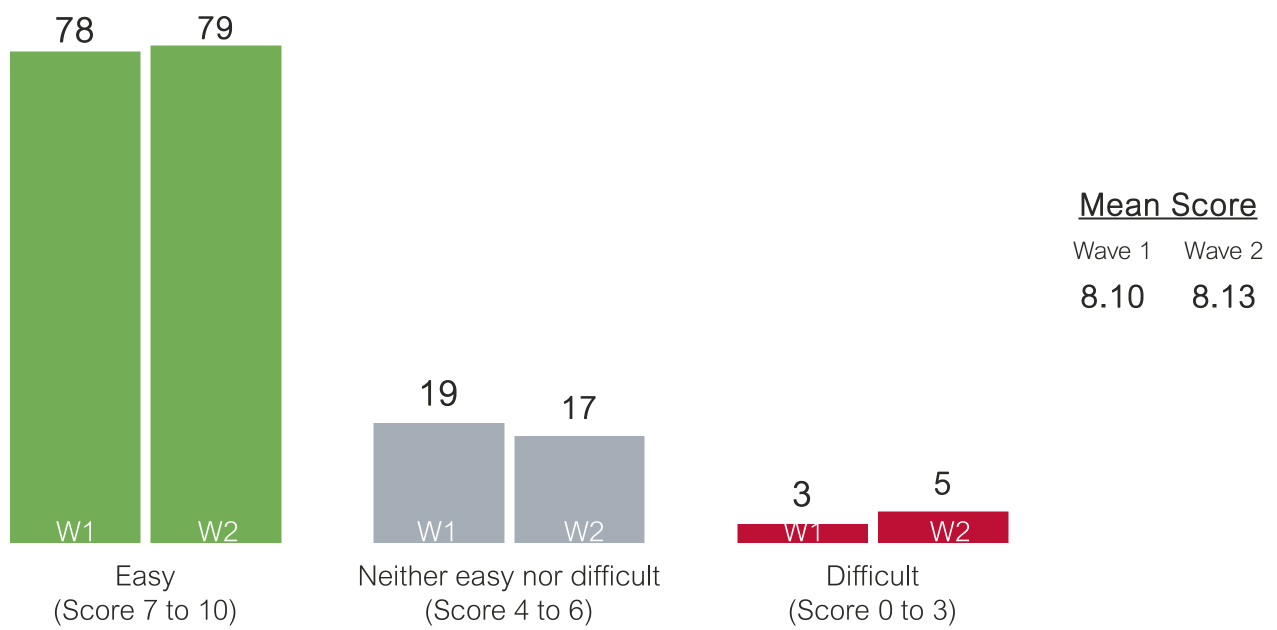
5.4 Ease of making a bill payment

Nearly eight in ten (79%) bill payers find it easy to make a bill payment. Very few (5%) find it difficult to do this, with one in six (17%) saying they find it neither easy nor difficult (Figure 5.3).[13] In all, the mean score given by bill payers is 8.13.There has been no statistically significant change in these results since Wave 1.

[13] 6% of bill payers reported that they have not had experience of making a bill payment.

Figure 5.3 – Ease of making a bill payment

On a scale of 0-10 where 0 means it is extremely difficult and 10 means it is extremely easy, how easy or difficult do you find it dealing with [named energy supplier] to make a bill payment? (%)



*If Wave 2 results are significantly higher (or lower) than Wave 1 results they are highlighted in green (red).

Base: All who have responsibility for paying energy bills who either have mains electricity and know who their electricity supplier is OR (if don't have electricity supplier or know who it is) have mains gas and know who their gas supplier is. (ALL APPLICABLE) (Unweighted base size: Wave 1 - 1,323 ; Wave 2 - 1,316).

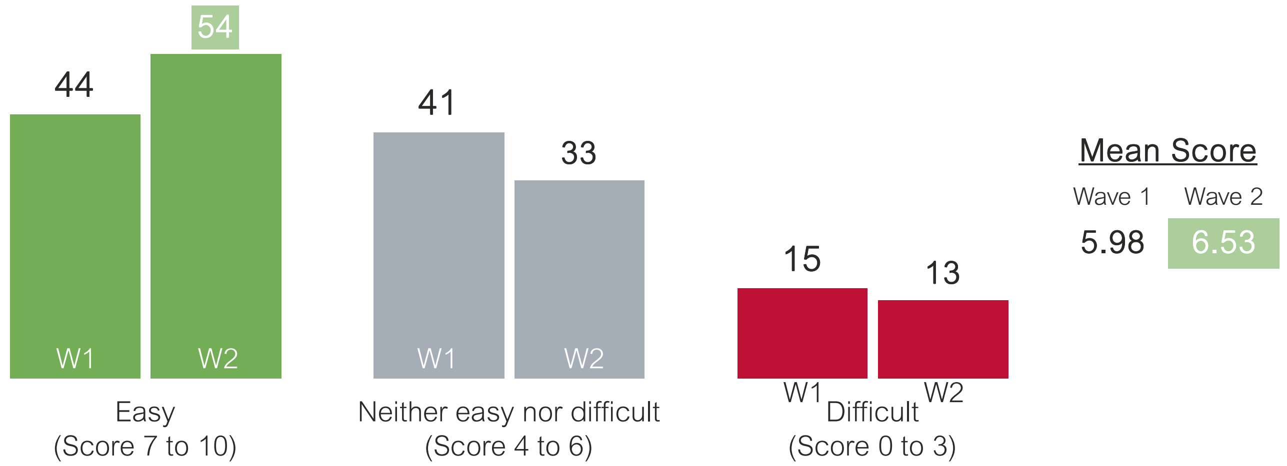
5.5 Ease of getting a complaint resolved

More bill payers find it easy to get a complaint resolved than was the case in Wave 1. More than half (54%) of bill payers now find it easy to get a complaint resolved – up from 44%.[14] However, the proportion that finds it difficult has not changed significantly (13%), whereas those who find it neither easy nor difficult has fallen (41% to 33%). As such, though there has been a positive change in the proportion who find it easy, there still remains a minority who have found the process difficult. In line with these positive increases, the mean score given by bill payers has risen from 5.98 to 6.53.

[14] This is among bill payers who have experience of trying to get a complaint resolved - for many bill payers (39%) this is not something they have tried to do.

Figure 5.4 – Ease of getting a complaint resolved

On a scale of 0-10 where 0 means it is extremely difficult and 10 means it is extremely easy, how easy or difficult do you find it dealing with [named energy supplier] to get a complaint resolved? (%)



*If Wave 2 results are significantly higher (or lower) than Wave 1 results they are highlighted in green (red).

Base: All who have responsibility for paying energy bills who either have mains electricity and know who their electricity supplier is OR (if don't have electricity supplier or know who it is) have mains gas and know who their gas supplier is. (ALL APPLICABLE) (Unweighted base size: Wave 1 - 880 ; Wave 2 - 931).

5.6 Sub-group differences for ease of dealing with energy suppliers

As in Wave 1, there are a number of common themes that emerge for certain sub-groups who are significantly more likely to find it easy to deal with their energy supplier across a number of different service aspects. The following differences were also seen in Wave 1.

Sub-groups significantly more likely to be positive for all four service areas are:

- *Promoters of their energy supplier* compared to those who are passive or detractors.
- *Bill payers who trust their energy supplier to provide them with a service that meets their needs* (Customer Trust Score) compared to those who distrust their energy supplier to do so.

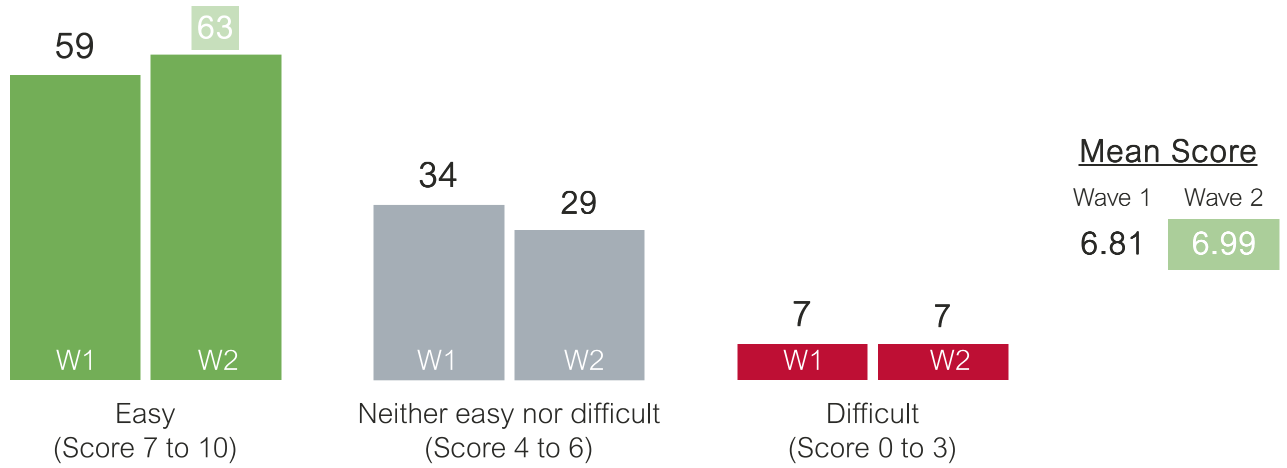
Additionally, those in social grades A and B are more likely (than those in grades D and E) to find it easy to provide a meter reading and to make a bill payment.

5.7 Overall Customer Effort Score

More bill payers find the experience of dealing with their energy supplier easy than in Wave 1. When asked to think about their experiences overall, more than six in ten (63%) bill payers now say it is easy to deal with their energy supplier – up from 59% (Figure 5.5). In line with these positive increases, the mean score given by bill payers has risen from 6.81 to 6.99. However, those who find it difficult has not changed significantly (7%), whereas those who find it neither easy nor difficult has fallen (34% to 29%). As such, though there has been a positive change in the proportion who find it easy, the small minority that find it difficult remains steady.

Figure 5.5 – Overall Customer Effort Score

And thinking about your overall experiences of them, how easy or difficult do you find dealing with [named energy supplier]? Please answer on a scale of 0 to 10 where 0 is extremely difficult and 10 is extremely easy. (%)



*If Wave 2 results are significantly higher (or lower) than Wave 1 results they are highlighted in green (red).

Base: All who have responsibility for paying energy bills who either have mains electricity and know who their electricity supplier is OR (if don't have electricity supplier or know who it is) have mains gas and know who their gas supplier is. (Unweighted base size: Wave 1 - 1,427 ; Wave 2 - 1,420).

5.7.1 Sub-group differences

As in Wave 1, and as would be expected given the themes already discussed in Section 5.6, those who are Promoters of their supplier, trust their supplier (Customer Trust Score) and who are aged 65 and over, are more likely to find it easy to deal with their energy supplier.

6 Trust in energy suppliers

This chapter covers bill payers' trust in their energy supplier. It discusses trust in relation to four aspects of service: providing value for money; providing accurate bills; addressing complaints fairly; and being open and transparent. The chapter then discusses an overall *Customer Trust Score* followed by examining bill payers' relative trust in their energy supplier compared to other suppliers.

6.1 Introduction

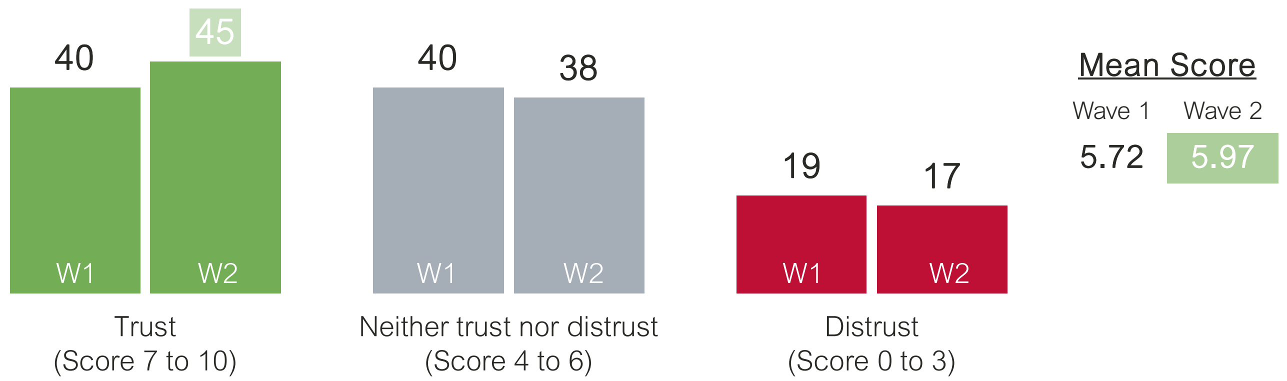
All bill payers who could name either their electricity or gas supplier were asked a series of questions about the extent to which they trust their energy supplier.

6.2 Trust in energy suppliers to provide value for money

More bill payers trust their energy supplier to provide value for money than in Wave 1. Nearly half (45%) of bill payers now say they trust their energy supplier to provide them with value of money – up from 40% in Wave 1 (Figure 6.1). In line with these positive increases, the mean score given by bill payers has risen from 5.72 to 5.97.

Figure 6.1 – Trust in energy suppliers to provide value for money

On a scale of 0-10 where 0 means you don't trust them at all and 10 means you trust them completely, how much, if at all, do you trust [named energy supplier] to provide you with value for money? (%)



*If Wave 2 results are significantly higher (or lower) than Wave 1 results they are highlighted in green (red).

Base: All who have responsibility for paying energy bills who either have mains electricity and know who their electricity supplier is OR, if don't have electricity supplier or know who it is, have mains gas and know who their gas supplier is (Unweighted base size: Wave 1 - 1,427 ; Wave 2 - 1,420).

6.2.1 Sub-group differences

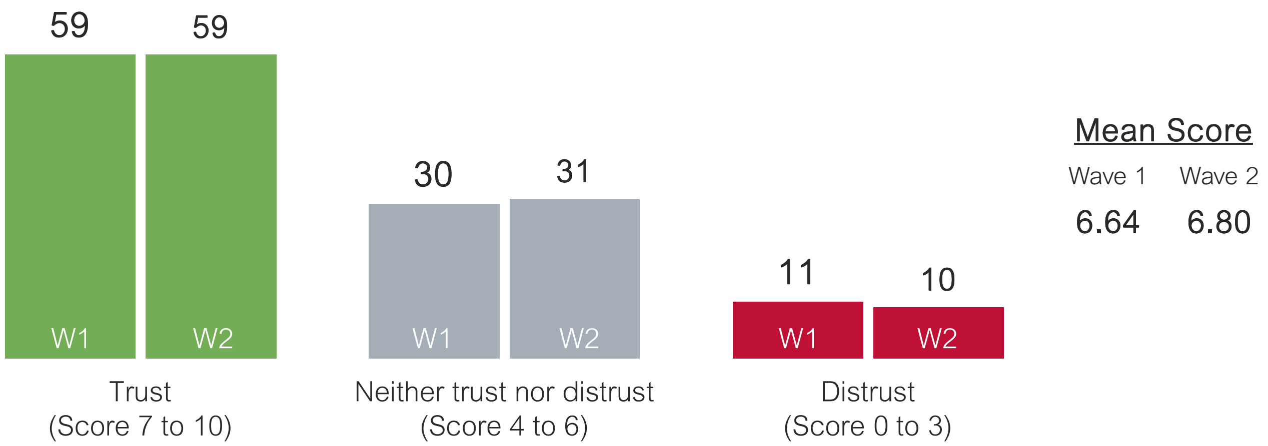
There are a number of different groups of bill payers that are significantly more likely to trust their energy supplier to provide them with value for money (score of 7 to 10) than other groups. As the sub-group differences are similar for the other three trust statements discussed in this chapter, the sub-group differences for all trust issues are presented in Section 6.6.

6.3 Trust in energy suppliers to provide accurate bills

Nearly three in five (59%) bill payers trust their energy supplier to provide them with an accurate bill. Just one in ten (10%) distrust them to do so, with three in ten (31%) neither trusting nor distrusting them (Figure 6.2). The average score has also remained consistent with last year (6.80). There has been no statistically significant change in these results since Wave 1.

Figure 6.2 – Trust in energy suppliers to provide accurate bills

On a scale of 0-10 where 0 means you don't trust them at all and 10 means you trust them completely, how much, if at all, do you trust [named energy supplier] to provide you with an accurate bill? (%)



*If Wave 2 results are significantly higher (or lower) than Wave 1 results they are highlighted in green (red).

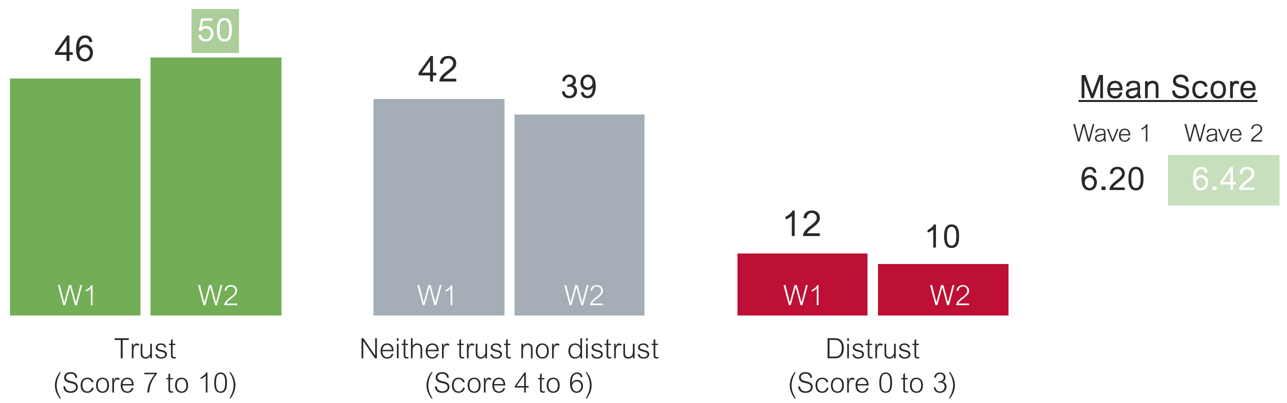
Base: All who have responsibility for paying energy bills who either have mains electricity and know who their electricity supplier is OR, if don't have electricity supplier or know who it is, have mains gas and know who their gas supplier is (Unweighted base size: Wave 1 - 1,427 ; Wave 2 - 1,420).

6.4 Trust in energy suppliers to deal with complaints fairly

More bill payers trust their energy supplier to deal with their complaints fairly than in Wave 1. Half (50%) of bill payers now say they trust their energy supplier to deal with their complaints fairly – up from 46% in Wave 1 (Figure 6.3). In line with this positive increase, the mean score given by bill payers has risen from 6.20 to 6.42.

Figure 6.3 – Trust in energy suppliers to deal with complaints fairly

On a scale of 0-10 where 0 means you don't trust them at all and 10 means you trust them completely, how much, if at all, do you trust [named energy supplier] to deal with your complaints fairly? (%)



*If Wave 2 results are significantly higher (or lower) than Wave 1 results they are highlighted in green (red).

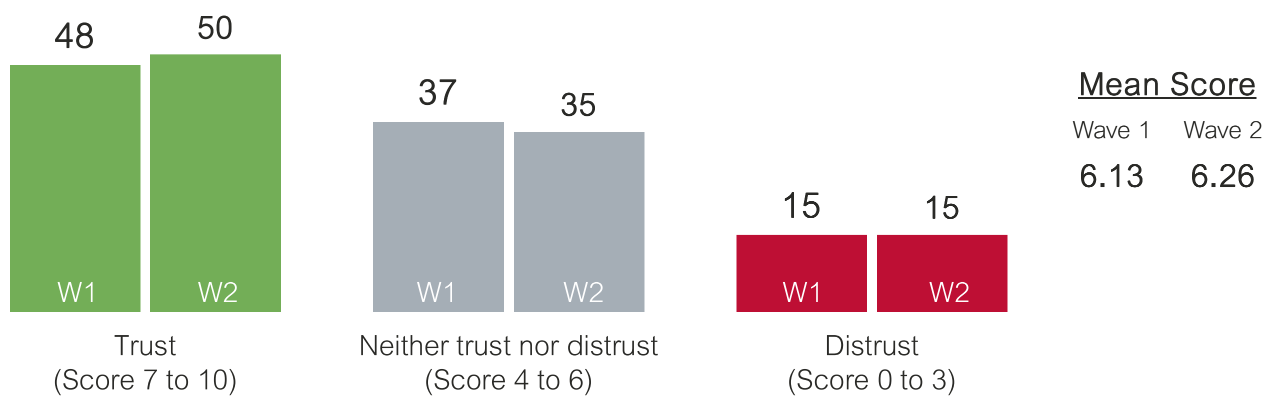
Base: All who have responsibility for paying energy bills who either have mains electricity and know who their electricity supplier is OR, if don't have electricity supplier or know who it is, have mains gas and know who their gas supplier is (Unweighted base size: Wave 1 - 1,427 ; Wave 2 - 1,420).

6.5 Trust in energy suppliers to be open and transparent

Half (50%) of bill payers trust their energy supplier to be open and transparent in their dealings with them. Just over one in seven (15%) distrust them to do so, while three in ten (35%) neither trust nor distrust them (Figure 6.4). The average score has also remained consistent with last year (6.26). There has been no statistically significant change in these results since Wave 1.

Figure 6.4 – Trust in energy suppliers to be open and transparent

On a scale of 0-10 where 0 means you don't trust them at all and 10 means you trust them completely, how much, if at all, do you trust [named energy supplier] to be open and transparent in their dealings with you? (%)



*If Wave 2 results are significantly higher (or lower) than Wave 1 results they are highlighted in green (red).

Base: All who have responsibility for paying energy bills who either have mains electricity and know who their electricity supplier is OR, if don't have electricity supplier or know who it is, have mains gas and know who their gas supplier is (Unweighted base size: Wave 1 - 1,427 ; Wave 2 - 1,420).

6.6 Sub-group differences for trust in energy supplier

There are a number of themes that emerge – across each element of trust - in the degree to which different types of bill payer trust their energy supplier. The following customer groups are more likely to trust their supplier in all four areas of service in Wave 2, as they were in Wave 1:

- *Promoters of their energy supplier* compared to those who are passive or detractors.
- *Bill payers who trust their energy supplier to provide them with a service that meets their needs* (Customer Trust Score) compared to those who distrust their energy supplier to do so.
- *Bill payers who find it easy to deal with their energy supplier* (Customer Effort Score) compared to those who find it difficult.
- *Bill payers aged 65 and over* compared to those aged 15 to 64.
- *Those without any formal qualification* compared to those that do have a formal qualification. (N.B. There were no differences for this group on providing accurate bills and dealing with complaints fairly, in Wave 1).
- *Bill payers who have access to the internet* compared to those that do not. (N.B. There were no differences for this group on providing accurate bills and dealing with complaints fairly, in Wave 1).

Additionally, *bill payers in social grades A or B* are more likely (than social grades D or E) to trust suppliers to provide them with value for money and deal with their complaints fairly – this was not the case in Wave 1. In Wave 1, those in social grades A or B were more likely to trust their energy supplier to provide them with an accurate bill - this was not the case in Wave 2.

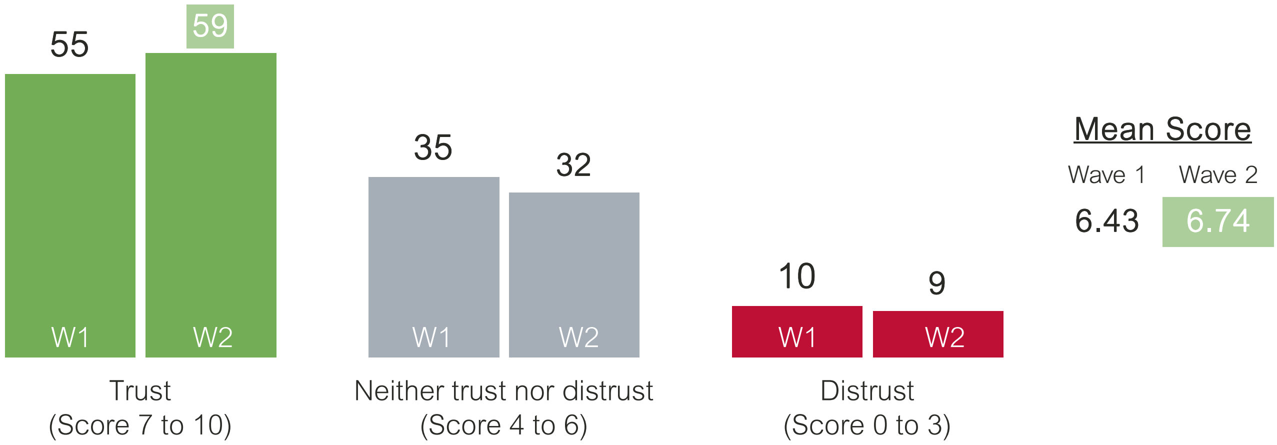
In Wave 1, *bill payers that have switched energy supplier in the last 12 months* (compared to those that have not) were more likely to trust their supplier to provide them with value for money. This difference is not seen in Wave 2.

6.7 Overall Customer Trust Score

More bill payers trust their energy supplier in general than in Wave 1. When asked to think about the overall service their energy supplier provides, 59% of bill payers trust their energy supplier to provide them with a service that meets their needs – up from 55% in Wave 1 (Figure 6.5). In line with this positive increase, the mean score given by bill payers has risen from 6.43 to 6.74.

Figure 6.5 – Overall Customer Trust Score

Thinking about the overall service that [named energy supplier] provides to you, to what extent do you trust them or not to provide you with a service that meets your needs? Please answer on a scale of 0-10 where 0 means you don't trust them at all and 10 means you trust them completely. (%)



*If Wave 2 results are significantly higher (or lower) than Wave 1 results they are highlighted in green (red).

Base: All who have responsibility for paying energy bills who either have mains electricity and know who their electricity supplier is OR, if don't have electricity supplier or know who it is, have mains gas and know who their gas supplier is (Unweighted base size: Wave 1 - 1,427 ; Wave 2 - 1,420).

6.7.1 Sub-group differences

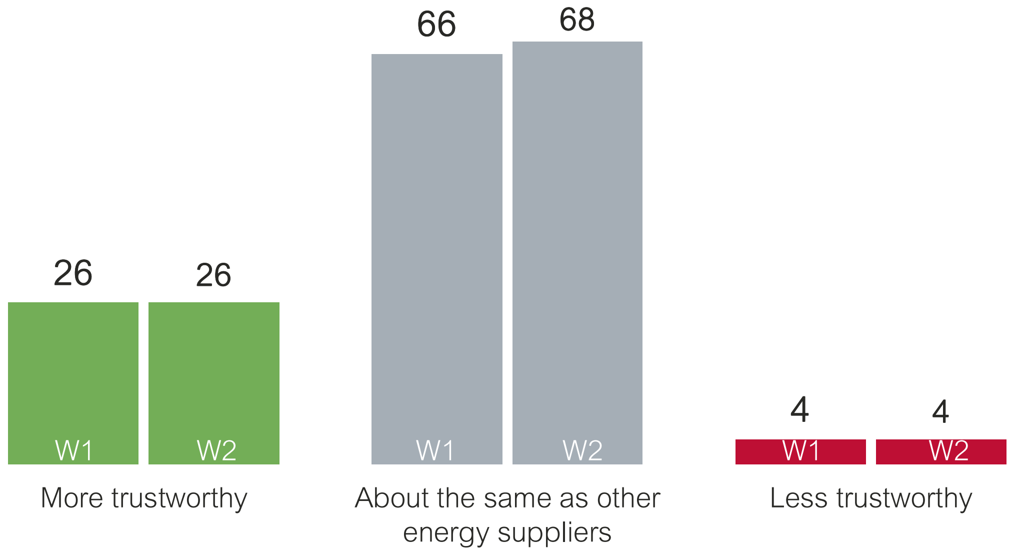
As was the case in Wave 1, Promoters of their energy supplier, bill payers who find it easy to deal with their energy supplier (Customer Effort Score) and those aged 65 or over, are significantly more likely to trust their energy supplier to provide them with a service that meets their needs (score of 7 to 10). However, unlike in Wave 1, bill payers that have switched energy supplier in the last 12 months are no more likely than those who have not switched, to trust their energy supplier.

6.8 Relative trust in energy suppliers

Most bill payers state that they trust their energy supplier about the same as they would other energy suppliers (68%). A quarter (26%) of bill payers state that their energy supplier is more trustworthy, with very few (4%) believing their energy supplier is less trustworthy than other energy suppliers (Figure 6.6). There has been no statistically significant change in these results since Wave 1.

Figure 6.6 – Relative trust in energy suppliers

How trustworthy would you say [named energy supplier] is compared to other energy suppliers? By energy supplier, we mean the companies that people buy their electricity or gas from.



*If Wave 2 results are significantly higher (or lower) than Wave 1 results they are highlighted in green (red).

Base: All who have responsibility for paying energy bills who either have mains electricity and know who their electricity supplier is OR, if don't have electricity supplier or know who it is, have mains gas and know who their gas supplier is (Unweighted base size: Wave 1 - 1,427 ; Wave 2 - 1,420).

6.8.1 Sub-group differences

As in Wave 1, Promoters of their energy supplier, bill payers who trust their supplier to provide them a service that meets their needs (Customer Trust Score) and who find it easy to deal with their supplier (Customer Effort Score), are significantly more likely to consider their energy supplier to be more trustworthy than other energy suppliers. However, unlike in Wave 1, bill payers that have switched energy supplier in the last 12 months are not significantly more likely to trust their supplier more than others.

7 Likelihood to recommend supplier

This chapter covers bill payers' likelihood to recommend their energy supplier.

7.1 Introduction

All bill payers who could name either their electricity or gas supplier, were asked the Net Promoter question *"How likely would you be to recommend [named energy supplier] to friends, relatives or colleagues?"* Answers were on a scale of 0 (I would definitely not recommend them) to 10 (I would definitely recommend them).[15]

The Net Promoter Score is a simple and widely used calculation, where the scores are grouped into the following categories:

- "Promoters" (score 9 to 10)
- "Passives" (score 7 to 8)
- "Detractors" (score 0 to 6)

The Net Promoter Score is calculated by detracting the number of "Promoters" from the number who are "Detractors". It is important to note that the Promoter Score is calculated on this basis (i.e. 9 to 10) because it is unlikely that those giving a lower score are realistically likely to speak to their friends and family about their supplier. This is a different grouping of scores than used for the questions on trust and customer effort (7 to 10 are categorised as 'easy' or 'trusting'). The latter groupings are used as they are reflective of the more positive end of the response spectrum.

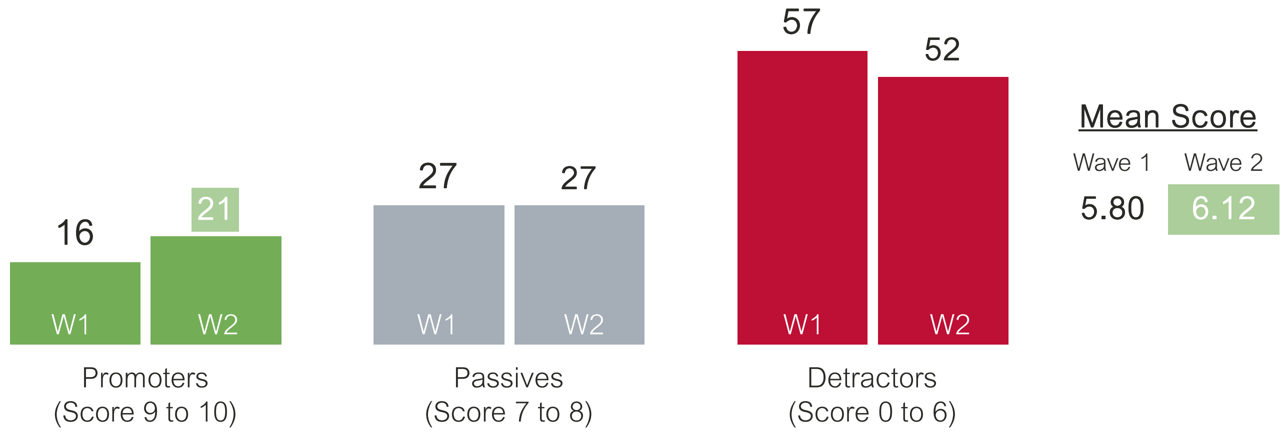
7.2 Likelihood to recommend supplier

More bill payers would recommend their energy supplier than in Wave 1. More than a fifth (21%) are Promoters of their supplier, up from 16% in Wave 1. There has not been a significant shift in those who are Passives (27% in both waves), but there has been a significant fall in those who would be Detractors (57% to 52%). As such, the Net Promoter Score has improved from -40% to -30% (Figure 7.1).

[15] The Net Promoter Score was created in 2003 by Fred Reichheld at Bain & Company. More information can be found at: http://www.netpromotersystem.com

Figure 7.1 – Likelihood to recommend supplier

How likely would you be to recommend [named energy supplier] to friends, relatives or colleagues? Please answer on a scale of 0-10 where 0 means you would definitely not recommend them and 10 means you would definitely recommend them. (%)



*If Wave 2 results are significantly higher (or lower) than Wave 1 results they are highlighted in green (red).

Base: All who have responsibility for paying energy bills who either have mains electricity and know who their electricity supplier is OR (if don't have electricity supplier or know who it is) have mains gas and know who their gas supplier is. (ALL APPLICABLE) (Unweighted base size: Wave 1 - 1,427 ; Wave 2 - 1,420).

Results for this indicator of customer experiences of energy suppliers are slightly more critical than they are for trust in suppliers or ease of dealing with them. However, it should be noted that this partly reflects the different calculation used for the net promoter question. Although just 21% are 'Promoters' of their supplier, this broadly matches the proportion that would rate their supplier nine or ten on trust (24%) and only slightly lower than for ease of dealing with suppliers (27%).

Views are generally more critical though; when considering likelihood to recommend using the same scale as used in earlier chapters on customer effort (Chapter 5) and trust (Chapter 6) 15% would be considered critical (score 0 to 3) compared to 9% on trust and 7% for ease of dealing with suppliers.

It is likely that factors external to the supplier-customer relationship, such as media coverage and word of mouth, also impact on customer perceptions of the energy industry. However, it is not possible to quantify any such impact. These results may suggest that, as was the case six months ago, despite a broadly solid foundation of trust in suppliers and views of dealing with them, they are not positive enough for consumers to actively recommend their energy supplier.

8 Appendices

8.1 Appendix 1: Questionnaire

Key:
BLUE TEXT - Scripting instructions (MP – Multicode; SP – Single code; DK – Don't know; REF – Refused) WEEK 2 – Also asked in Week Two.

FILTERING QUESTIONS

(NEW SCREEN)
INTERVIEWER: PLEASE DO NOT SHOW SCREEN UNTIL OTHERWISE INSTRUCTED

INTRO
I am now going to ask you some questions about your experiences of your energy supplier.

ASK ALL
Q1 WEEK 2
Do you have mains electricity and/or mains gas in your home?

INTERVIEWER – IF NEEDED: MAINS GAS - If you use gas for cooking, or for heating your home, and you do not regularly buy bottled gas, you are likely to be connected to mains gas.

CODES 1 AND 2 ARE MULTICODE

(MP FOR CODES 1 AND 2, SP FOR CODE 3, allow hidden DK and REF)
1. Yes – mains electricity
2. Yes – mains gas
3. No – neither

CLOSE IF CODE DK OR REF OR CODE 3

ASK ALL
Q2 WEEK 2
Please could you tell me which of the following statements best applies to you?
(SP, allow hidden DK and REF)
INTERVIEWER NOTE: IF THE RESPONDENT IS UNCLEAR BECAUSE THEIR BILLS ARE COVERED WITHIN A SERVICE CHARGE, OR RENT OR HOUSING COST, PLEASE CODE 3 – "I HAVE NO RESPONSIBILITY"

1. I have sole responsibility for paying the [electricity IF ONLY CODE 1 AT Q1] [gas – IF ONLY CODE 2 AT Q1] [energy IF CODE 1 AND 2 AT Q2] bills in my household
2. I have joint responsibility for paying the [electricity IF ONLY CODE 1 AT Q1] [gas – IF ONLY CODE 2 AT Q1] [energy IF CODE 1 AND 2 AT Q2] bills in my household
3. I have no responsibility for paying the [electricity IF ONLY CODE 1 AT Q1] [gas – IF ONLY CODE 2 AT Q1] [energy IF CODE 1 AND 2 AT Q2] bills in my household (for example, someone else in the household pays them, or your bills are covered within your service charge or rent)

CLOSE IF CODE DK OR REF OR CODE 3

(NEW SCREEN)
INTERVIEWER: PLEASE SHOW SCREEN UNTIL OTHERWISE INSTRUCTED

ASK ALL WHO CODE 1 AT Q1
Q3 WEEK 2

Which, if any, of the following companies do you buy your electricity from?
(SP, allow hidden DK and REF)

1. British Gas
2. Co-operative Energy
3. E.ON;
4. Ebico
5. Ecotricity
6. EDF
7. First Utility
8. Good Energy
9. Marks & Spencer Energy
10. npower
11. Ovo
12. Sainsburys Energy
13. Scottish Hydro
14. Scottish Power
15. Southern Electric
16. Spark Energy
17. SSE
18. Swalec
19. Other (write in) TEXT BOX

ASK ALL WHO CODE 2 AT Q1
Q4 WEEK 2
Which, if any, of the following companies do you buy your gas from?
(SP, allow hidden DK and REF)

1. British Gas
2. Co-operative Energy
3. E.ON
4. Ebico
5. Ecotricity
6. EDF
7. First Utility
8. Good Energy
9. Marks & Spencer Energy
10. npower
11. Ovo
12. Sainsburys Energy
13. Scottish Hydro
14. Scottish Power
15. Southern Electric
16. Spark Energy
17. SSE
18. Swalec
19. Other (write in) TEXT BOX

EASE OF SWITCHING SUPPLIER

ASK ALL
Q5 WEEK 2
Have you switched, or tried to switch, your [electricity IF ONLY CODE 1 AT Q1] [gas – IF ONLY CODE 2 AT Q1] [gas or electricity IF CODE 1 AND 2 AT Q1] supplier in the last 12 months?
(SP, allow hidden DK and REF)

1. Yes I have switched
2. I tried to switch but didn't do so
3. No I have not tried to switch

ASK ALL WHO HAVE BOTH GAS AND ELECTRICITY (CODE 1 AND 2 AT Q1) AND CODE 1 OR 2 AT Q5
Q6 WEEK 2
Thinking about the last time you [switched IF CODE 1 AT Q5] [tried to switch IF CODE 2 AT Q5], did you [switch IF CODE 1 AT Q5] [try to switch IF CODE 2 AT Q5] your gas supplier, electricity supplier or both?
(SP, allow hidden DK and REF)

1. I [switched IF CODE 1 AT Q5] [tried to switch IF CODE 2 AT Q5] my gas supplier only
2. I [switched IF CODE 1 AT Q5] [tried to switch IF CODE 2 AT Q5] my electricity supplier only
3. I [switched IF CODE 1 AT Q5] [tried to switch IF CODE 2 AT Q5] both my gas and electricity supplier from one supplier to another
4. I [switched IF CODE 1 AT Q5] [tried to switch IF CODE 2 AT Q5] both my gas and electricity supplier from two separate suppliers to one supplier for both
5. I [switched IF CODE 1 AT Q5] [tried to switch IF CODE 2 AT Q5] both my gas and electricity supplier from two separate suppliers to two separate suppliers again

ASK ALL WHO CODE 1 OR 2 AT Q5
Q7 WEEK 2
Thinking about the last time you [switched IF CODE 1 AT Q5] [tried to switch IF CODE 2 AT Q5] your [electricity IF ONLY CODE 1 AT Q1 AND CODE 1 OR 2 AT Q5. OR IF CODE 2 AT Q6] [gas – IF ONLY CODE 2 AT Q1 AND CODE 1 OR 2 AT Q5. OR IF CODE 1 AT Q6] [gas or electricity IF CODE 3, 4 OR 5 AT Q6] supplier, overall, how easy or difficult would you say it was to [try to IF CODE 2 AT Q5] switch your account to a new supplier?

When answering, please think about how easy or difficult the process was of [trying to switch IF CODE 2 AT Q5] [switching IF CODE 1 AT Q5] the account rather than deciding who to switch to in the first place.

Please answer on a scale of 0 to 10, where 0 was extremely difficult and 10 was extremely easy.
(SP, allow hidden DK and REF)

0 – It was extremely difficult
…
10 – It was extremely easy

<u>TRUST</u>
ASK ALL WHO MEET ANY OF THE FOLLOWING CRITERIA:

- CODE 1 AT Q1 (WHETHER CODING 1 ONLY OR 1 AND 2) AND ALSO CODE 1-19 AT Q3.
- ONLY CODE 2 AT Q1 AND ALSO CODE 1-19 AT Q4.
- CODE 1 AND 2 AT Q1 AND DO NOT CODE 1-19 AT Q3 BUT CODE 1-19 AT Q4

Q8
I would like to ask you about the extent to which you trust [IF CODE 1 (WHETHER CODING 1 ONLY OR 1 AND 2) AT Q1 AND CODE 1-19 AT Q3 INSERT NAME FROM Q3. (IF CODE OTHER AT Q3, FEEDTHROUGH TEXT). IF ONLY CODE 2 AT Q1 AND CODE 1-19 AT Q4: INSERT NAME FROM Q4. (IF CODE OTHER AT Q4 FEEDTHROUGH TEXT). IF CODE 1 AND 2 AT Q1 AND DO NOT CODE 1-19 AT Q3 BUT CODE 1-19 AT Q4 INSERT NAME FROM Q4 (IF CODE OTHER AT Q4 FEEDTHROUGH TEXT)] across a range of different issues.

On a scale of 0-10 where 0 means you don't trust them at all and 10 means you trust them completely, how much, if at all, do you trust [IF CODE 1 AT Q1 INSERT NAME FROM Q3. IF CODE OTHER FEEDTHROUGH TEXT. IF ONLY CODE 2 AT Q1: INSERT NAME FROM Q4. (IF CODE OTHER AT Q4 FEEDTHROUGH TEXT)] to…?
(SP PER ROW, allow hidden DK and REF)

COMPUTING: ROTATE STATEMENTS

DOWN SIDE OF GRID:

A. Provide you with value for money
B. Provide you with an accurate bill

C. Deal with your complaints fairly
D. Be open and transparent in their dealings with you

TOP SIDE OF GRID:

0 – I don't trust them at all
…
10 – I trust them completely

ASK ALL WHO MEET ANY OF THE FOLLOWING CRITERIA:

- CODE 1 AT Q1 (WHETHER CODING 1 ONLY OR 1 AND 2) AND ALSO CODE 1-19 AT Q3.
- ONLY CODE 2 AT Q1 AND ALSO CODE 1-19 AT Q4.
- CODE 1 AND 2 AT Q1 AND DO NOT CODE 1-19 AT Q3 BUT CODE 1-19 AT Q4

Q9

Thinking about the overall service that [IF CODE 1 AT Q1 INSERT NAME FROM Q3. IF CODE OTHER FEEDTHROUGH TEXT. IF ONLY CODE 2 AT Q1: INSERT NAME FROM Q4. (IF CODE OTHER AT Q4 FEEDTHROUGH TEXT)] provides to you, to what extent do you trust them or not to provide you with a service that meets your needs?

Please answer on a scale of 0-10 where 0 means you don't trust them at all and 10 means you trust them completely.
(SP, allow hidden DK and REF)

0 – I don't trust them at all
…
10 – I trust them completely

ASK ALL WHO MEET ANY OF THE FOLLOWING CRITERIA:

- CODE 1 AT Q1 (WHETHER CODING 1 ONLY OR 1 AND 2) AND ALSO CODE 1-19 AT Q3.
- ONLY CODE 2 AT Q1 AND ALSO CODE 1-19 AT Q4.
- CODE 1 AND 2 AT Q1 AND DO NOT CODE 1-19 AT Q3 BUT CODE 1-19 AT Q4

Q10

How trustworthy would you say [IF CODE 1 AT Q1 INSERT NAME FROM Q3. IF CODE OTHER FEEDTHROUGH TEXT. IF ONLY CODE 2 AT Q1: INSERT NAME FROM Q4. (IF CODE OTHER AT Q4 FEEDTHROUGH TEXT)] is compared to other energy suppliers? By energy supplier, we mean the companies that people buy their electricity or gas from. Please read out the letter that applies.

(SP, allow hidden DK and REF)
A. Far more trustworthy
B. A bit more trustworthy
C. About the same as other energy suppliers
D. A bit less trustworthy
E. Far less trustworthy

<u>CUSTOMER EFFORT SCORE</u>

ASK ALL WHO MEET ANY OF THE FOLLOWING CRITERIA:

- CODE 1 AT Q1 (WHETHER CODING 1 ONLY OR 1 AND 2) AND ALSO CODE 1-19 AT Q3.
- ONLY CODE 2 AT Q1 AND ALSO CODE 1-19 AT Q4.
- CODE 1 AND 2 AT Q1 AND DO NOT CODE 1-19 AT Q3 BUT CODE 1-19 AT Q4

Q11

I would like to ask you about how easy or difficult you find it to deal with [IF CODE 1 AT Q1 INSERT NAME FROM Q3. IF CODE OTHER FEEDTHROUGH TEXT. IF ONLY CODE 2 AT Q1: INSERT NAME FROM Q4. (IF CODE OTHER AT Q4 FEEDTHROUGH TEXT)] about a number of aspects of its service.

On a scale of 0-10 where 0 means it is extremely difficult and 10 means it is extremely easy, how easy or difficult do you find it dealing with [IF CODE 1 AT Q1 INSERT NAME FROM Q3. IF CODE OTHER FEEDTHROUGH TEXT. IF ONLY CODE 2 AT Q1: INSERT NAME FROM Q4. (IF CODE OTHER AT Q4 FEEDTHROUGH TEXT)] to…?
(SP PER ROW, allow hidden DK and REF)

COMPUTING: ROTATE STATEMENTS

DOWN SIDE OF GRID:

A. Provide a meter reading
B. Find clear information about your account (for example, your current tariff or bill)
C. Make a bill payment
D. Get a complaint resolved

TOP SIDE OF GRID:

0 – I find it extremely difficult
…
10 – I find it extremely easy

Not Applicable – I have had no experience of this

ASK ALL WHO MEET ANY OF THE FOLLOWING CRITERIA:

- CODE 1 AT Q1 (WHETHER CODING 1 ONLY OR 1 AND 2) AND ALSO CODE 1-19 AT Q3.
- ONLY CODE 2 AT Q1 AND ALSO CODE 1-19 AT Q4.
- CODE 1 AND 2 AT Q1 AND DO NOT CODE 1-19 AT Q3 BUT CODE 1-19 AT Q4

Q12
And thinking about your overall experiences of them, how easy or difficult do you find dealing with [IF CODE 1 AT Q1 INSERT NAME FROM Q3. IF CODE OTHER FEEDTHROUGH TEXT. IF ONLY CODE 2 AT Q1: INSERT NAME FROM Q4. (IF CODE OTHER AT Q4 FEEDTHROUGH TEXT)]?

Please answer on a scale of 0 to 10 where 0 is extremely difficult and 10 is extremely easy.

(SP, allow hidden DK and REF)

0 –It is extremely difficult
…
10 – It is extremely easy

<u>NET PROMOTER SCORE</u>
ASK ALL WHO MEET ANY OF THE FOLLOWING CRITERIA:

- CODE 1 AT Q1 (WHETHER CODING 1 ONLY OR 1 AND 2) AND ALSO CODE 1-19 AT Q3.
- ONLY CODE 2 AT Q1 AND ALSO CODE 1-19 AT Q4.
- CODE 1 AND 2 AT Q1 AND DO NOT CODE 1-19 AT Q3 BUT CODE 1-19 AT Q4

Q13
How likely would you be to recommend [IF CODE 1 AT Q1 INSERT NAME FROM Q3. IF CODE OTHER FEEDTHROUGH TEXT. IF ONLY CODE 2 AT Q1: INSERT NAME FROM Q4. (IF CODE OTHER AT Q4 FEEDTHROUGH TEXT)] to friends, relatives or colleagues?

Please answer on a scale of 0-10 where 0 means you would definitely not recommend them and 10 means you would definitely recommend them.
(SP, allow hidden DK and REF)
0 – I would definitely not recommend them
…
10 – I would definitely recommend them

For more information

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About Ipsos MORI's Social Research Institute

The Social Research Institute works closely with national governments, local public services and the not-for-profit sector. Its c.200 research staff focus on public service and policy issues. Each has expertise in a particular part of the public sector, ensuring we have a detailed understanding of specific sectors and policy challenges. This, combined with our methodological and communications expertise, helps ensure that our research makes a difference for decision makers and communities.