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Social Research Institute

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Consumer experiences of the Energy Market

Report for Energy UK

Research undertaken by Ipsos MORI

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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.

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

- 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 suppliers
- 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 was conducted across two weeks, between 21st February and 10th March 2014 with 4,004 interviews completed in total.

The majority of the findings discussed in this report are based on two subsets of those interviewed: **1,427 bill payers** from Week 1 (who are either solely or jointly responsible for paying the electricity and/or gas bills in their household); and **511 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 (97%).

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

1.2.1 Ease of switching supplier

Nearly one in six (16%) bill payers have switched their energy supplier in the last twelve months. Just one per cent tried to switch, but did not end up switching.

Nearly three quarters (74%) of recent 'switchers' found it easy to switch their account to a new supplier. Just one in ten (10%) found it difficult. Those who tried to switch but did not complete the process, found it more difficult than those who successfully switched (45%[2] and 7% found it difficult respectively).

Almost three quarters of bill payers who have switched supplier recently have found it easy to do so.

[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
[2] It should be noted that this is based on a small sample size of 38.

1.2.2 Ease of dealing with suppliers

In all, bill payers find it relatively easy to deal with their suppliers. When thinking about their experiences overall (the Customer Effort Score), **six in ten (59%) bill payers say it is easy to deal with their energy supplier**, whilst fewer than one in ten (7%) say it is difficult.

The majority of bill payers find it easy to deal with their supplier.

In terms of particular aspects of the service *experienced*, bill payers find it easiest to make a bill payment (78% say it is easy), followed by providing meter readings (72%) and finding clear information about their account (61%).[3] Bill payers do not find it as easy to get a complaint resolved, but are more likely to say it is easy than difficult (44% vs. 15%).

1.2.3 Trust in energy suppliers

In all, more bill payers trust their energy supplier than distrust them. **Just over half (55%) of bill payers trust their energy supplier to provide them with a service that meets their needs (Customer Trust Score).** Just one in ten (10%) distrust them to do so.

More than half of bill payers trust their supplier to provide a service that meets their needs

In terms of specific aspects of the service provided by energy suppliers, more bill payers trust their supplier to provide them with an accurate bill (59% say they trust them) than trust them to be to be open and transparent in their dealings with them (48%) or deal with complaints fairly (46%). Bill payers are least likely to trust their energy suppliers to provide them with value for money (40%), though views are still more positive than negative (19% distrust their supplier).

When asked how much they trust their energy supplier compared with other energy suppliers, most bill payers believe there is little or nothing to choose between them; **most state they trust their energy supplier about the same as other energy suppliers (66%)**. However, a greater proportion of bill payers consider their energy supplier to be more trustworthy (26%) than less trustworthy (4%).

Recent switchers (in the last 12 months) are more likely to be positive on value for money (48% trust their supplier on this issue compared to 39% who have not switched) and are also more likely to trust their supplier overall (61% compared to 54% who have not tried to switch). This suggests that customer experiences on value, as well as overall trust, tend to be improved somewhat once customers move to a new deal.

[3] 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" are removed from the base of this question (ranging from 6% to 39% of respondents, depending on the service issue).

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".[4]

Around one in six (16%) are Promoters of their energy supplier. Nearly six in ten (57%) are Detractors, with around a quarter (27%) being Passive. As such, the **Net Promoter Score is -40%.** 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. 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, despite a broadly solid foundation of trust in suppliers and views of dealing with them, views are not positive enough for consumers to actively recommend their energy supplier.

Key driver analysis (KDA) was conducted to examine the factors that drive likelihood to recommend supplier, as this is a useful measure to understand the regard in which suppliers are held by their customers.[5]

The results of the KDA show that bill payers' trust in their energy supplier to provide them with value for money is the most strongly correlated factor in their likelihood to recommend them. This is followed by higher trust in energy supplier, relative to others in the industry. The most important negative driver (i.e. make customers less likely to recommend and more likely to be critical) is where customers find it difficult to make a bill payment.

Bill payers that have switched energy supplier in the last 12 months are significantly more likely to be Promoters of their energy supplier than those who have not switched (26% and 15% respectively). This supports the finding that the process of changing supplier was generally perceived to be a relatively straightforward one and suggests that a smooth transition can help to improve perceptions of suppliers. However, it should be noted that the Net Promoter Score for this group is still negative (-25% compared to

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[4] 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.

[5] Both Customer Trust Score and Customer Effort Score were removed from the KDA model as the factors (unsurprisingly) were so highly correlated with Net Promoter Score that their inclusion in the KDA model obscures other issues that might be at play and renders the model ineffective

-43% of those who have not tried to switch) indicating that there is still some way to go before a majority of customers would speak highly of their supplier. More information on KDA can be found in Section 7.3.1.

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 eighteen months. 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.[6] On behalf of its members it commissioned Ipsos MORI to investigate consumers' experiences of the energy retail market. The findings will help to understand consumer perceptions of their energy supplier with the aim of understanding how the service can be improved.

2.2 Research purpose

Considering the background to the research, the overall aim of the research is to understand consumer opinions of, and engagement with, the retail energy market.

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.[7] 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.

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[6] 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.
[7] The 2013 Ofgem Customer Engagement Tracking Survey can be found at: http://www.ipsos-mori.com/researchpublications/publications/1566/Customer-Engagement-with-the-Energy-Market-Tracking-Survey-2013.aspx

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.

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.[8]

[8] 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

The research was conducted using Capibus, Ipsos MORI's weekly omnibus survey.[9] The survey was carried out over two weeks:

1. The first week included all survey questions (Q1 to Q13). Fieldwork was conducted between 21st February and 3rd March 2014. In total, 1,982 interviews were completed.

2. The second week repeated selected questions of the first Week (Q1 to Q7 on switching experiences) to boost sample sizes. Fieldwork was conducted between 28th February and 10th March 2014. In total, 2,022 interviews were completed.

All interviews were carried out in-home using computer-assisted personal interviewing (CAPI).

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[10], region, tenure, ethnicity and working status - within sex.[11]

3.1.3 Survey respondents

The nationally representative sample comprised of a total of 4,004 interviews. However, this research focuses on two sub-sets of this sample, namely:

[9] Further information can be found at: http://www.ipsos-mori.com/researchareas/omnibusservices/capibus.aspx
[10] 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
[11] 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): 1,427 bill payers from Week 1. 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): 511 recent 'switchers' from Weeks 1 and 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 3.1 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 3.1. Strictly speaking the margins of error shown here apply only to random samples; in practice good quality quota sampling has been found to be as accurate.

Table 3.1 – 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%
1,427 bill payers	±2%	±2%	±3%
511 recent 'switchers'	±3%	±4%	±4%

For example, with a sample of 1,427 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.

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 1.

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 3.2 shows how these have been grouped and the way they are described within the report.

Table 3.2 – 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[12]	0 to 6	Detractors	An overall Net Promoter Score is calculated as Promoters minus Detractors.
	7 to 8	Passives	
	9 to 10	Promoters	

[12] 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

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) (i.e. *And thinking about your overall experiences of them, how easy or difficult do you find dealing with British Gas?")*. Almost all (97%) 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 neither name their electricity or gas supplier were not asked these questions.

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 made up of both Weeks, unlike the remainder of the report which are solely based on Week 1 data.

Nearly three quarters of bill payers who have switched in the last twelve months found the process of switching their account easy.

4.2 Incidence of switching in the past 12 months

Nearly one in six (16%) bill payers have switched their energy supplier in the last twelve months. Just one 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.[13]

4.2.1 Sub-group differences

There are a number of sub-groups of customers that are significantly more likely to have switched their supplier in the last 12 months:

- *Bill payers aged 15 to 64* (18%) compared to those aged 65 and over (11%).
- *Bill payers in social grades A or B* (22%) compared to those in social grades D or E (11%).
- *Bill payers who have access to the internet* (18%) compared to those that do not (7%).

[13] The 2013 Ofgem Customer Engagement Tracking Survey can be found at: http://www.ipsos-mori.com/researchpublications/publications/1566/Customer-Engagement-with-the-Energy-Market-Tracking-Survey-2013.aspx

- *Bill payers with any formal qualifications* (18%) compared to those with no formal qualifications (8%).

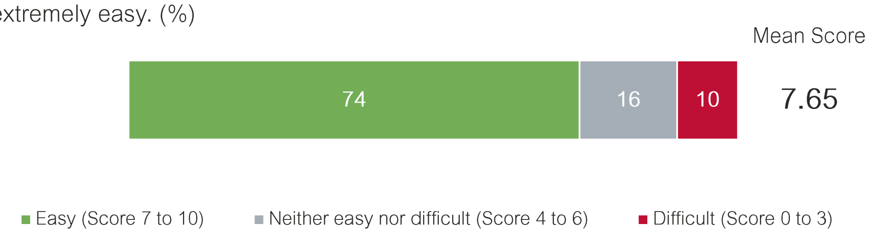
4.3 Ease of switching

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. Just one in ten (10%) found it difficult, with around one in six (16%) finding it neither easy nor difficult (Figure 4.1).

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. (%)



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: 511).

Of those who have successfully switched in the last twelve months, nearly eight in ten (78%) found it easy to switch their account to a new supplier; very few found it difficult (7%). In contrast, those who tried to switch but did not complete the switching process, found the process harder; just a quarter (27%) found it is easy, while nearly a half (45%) found it difficult.[14]

4.3.1 Sub-group differences

Bill payers aged 65 or over are more likely to have found the process of switching easy (83% compared to 72% of those aged under 65). Otherwise, there are no differences between different sub-groups of customer.

[14] These percentages are based on a small unweighted base size of 38. However, the finding is statistically significant.

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; make 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 39% of respondents, depending on the service issue) have been removed from the base for all questions discussed in this chapter.

Overall, bill payers mostly find it easy to deal with their energy suppliers in terms of providing meter readings, finding account information, paying bills and, to a lesser extent, resolving complaints.

Most respondents (97%) 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

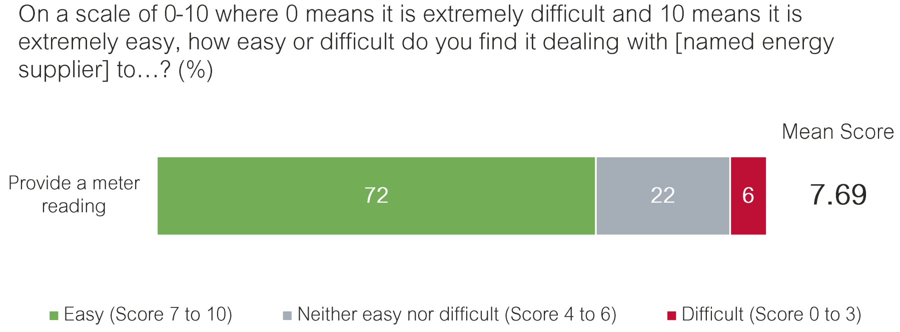
Seven in ten (72%) bill payers find it easy to provide a meter reading to their energy supplier. Only around one in twenty (6%) find it difficult to do this, with one in five (22%) saying they find it neither easy nor difficult (Figure 5.1).[15]

Around seven in ten find it easy to provide meter readings to their supplier.

One in three bill payers say it is extremely easy dealing with their energy supplier to provide a meter reading (32% give a score of 10), whilst only one percent say it is extremely difficult (2% give a score of 0). In all, the mean score given by bill payers is 7.69.

[15] 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



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. Results re-based to exclude those who answered "Not Applicable" (Unweighted base size:1,323).

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.

5.3 Ease of finding clear information about accounts

Six in ten (61%) bill payers say it is easy to find clear information about their account, such as their tariff or bill. One in eight (12%) find it difficult to access this information, while one in four (27%) say they find it neither easy nor difficult (Figure 5.2).

One in five bill payers say it is extremely easy to find clear information about their account (21% give a score of 10), with very few saying it is extremely difficult (3% give a score of 0). In all, the mean score given by bill payers is 6.90.

Three in five find it easy to find 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…? (%)

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. Results re-based to exclude those who answered "Not Applicable" (Unweighted base size:1,343).

5.4 Ease of making a bill payment

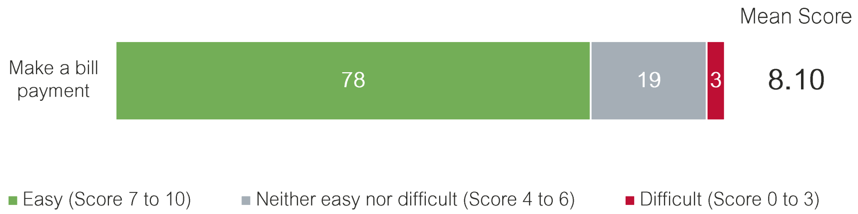
Nearly eight in ten (78%) bill payers find it easy to make a bill payment. Very few (3%) find it difficult to do this, with one in five (19%) saying they find it neither easy nor difficult (Figure 5.3).[16]

Two in five bill payers say it is extremely easy to make a bill payment (39% give a score of 10), whilst only one percent say it is extremely difficult (1% give a score of 0). In all, the mean score given by bill payers is 8.10.

Around four in five find it easy to make 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…? (%)



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. Results re-based to exclude those who answered "Not Applicable" (Unweighted base size:1,340).

5.5 Ease of getting a complaint resolved

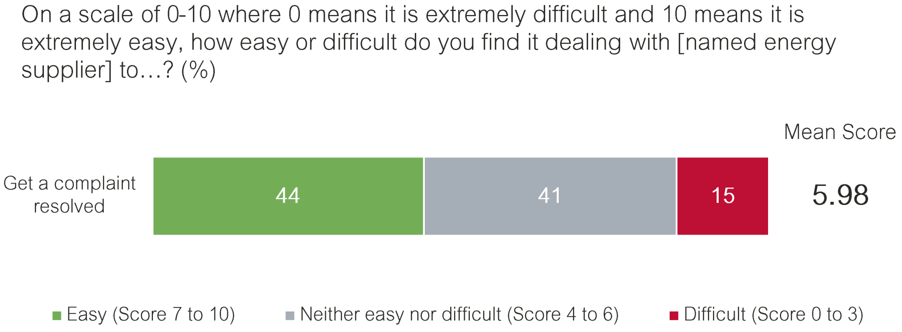
Four in ten (44%) bill payers find it easy get a complaint resolved.[17] A similar percentage (41%) find it neither easy nor difficult, while one in seven (15%) find it difficult (Figure 5.4).

Of those who have made a complaint to their current supplier, nearly half found it easy to get it resolved. One in seven found it difficult.

[16] 6% of bill payers reported that they have not had experience of making a bill payment.
[17] 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.

One in ten bill payers say it is extremely easy to get a complaint resolved (10% give a score of 10), with very few (4% give a score of 0) saying it is extremely difficult. In all, the mean score given by bill payers is 5.98.

Figure 5.4 – Ease of getting a complaint resolved



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. Results re-based to exclude those who answered "Not Applicable" (Unweighted base size: 880).

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

There are a number of common themes that emerge for certain sub-groups whereby they are significantly more likely to find it easy to deal with their energy supplier across a number of different service aspects. Sub-groups significantly more likely to be positive for <u>all four service areas</u> 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.
- *Bill payers who find it easy to deal with their energy supplier* (Customer Effort Score) compared to those who find it difficult.

Sub-groups significantly more likely to be positive for <u>some of the service areas</u> are:

- *Bill payers in social grade A and B* compared with those in grades D and E.

The results for different sub-groups across the four statements are shown in Table 5.1. The difference between the group highlighted in green and the group not highlighted is statistically significant for each measure.

Table 5.1 – Sub group differences for customer effort statements

Measure	Sub-group	Easy (score of 7-10) to…			
		Provide a meter reading	Find clear information about your account	Make a bill payment	Get a complaint resolved
Net Promoter Score	Promoters	92%	92%	95%	81%
	Passive	84%	81%	90%	70%
	Detractors	61%	42%	67%	23%
Customer Trust Score	Trust (Score 7 to 10)	88%	82%	91%	70%
	Distrust (Score 0 to 3)	42%	21%	54%	8%
Customer Effort Score	Easy (Score 7 to 10)	89%	84%	94%	71%
	Difficult (Score 0 to 3)	52%	22%	62%	10%
Social Grade	A or B	79%	68%	85%	Not significant
	D or E	69%	58%	73%	Not significant

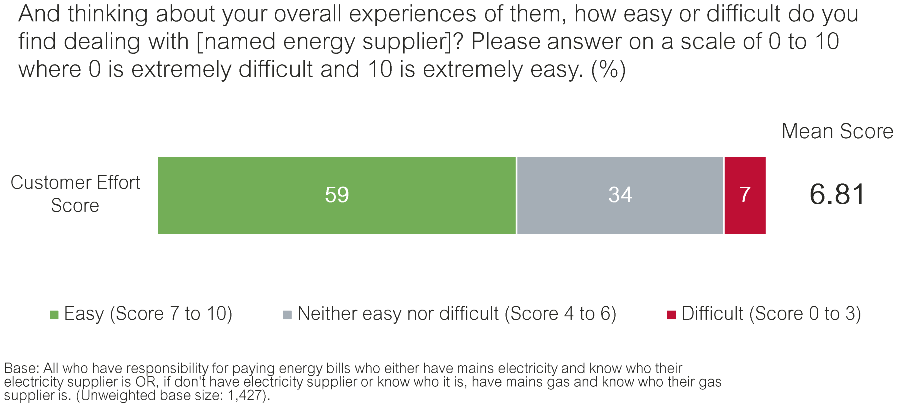
5.7 Overall Customer Effort Score

When asked to think about their experiences overall, six in ten (59%) bill payers say it is easy to deal with their energy supplier, whilst fewer than one in ten (7%) say it is difficult (Figure 5.5). A third (34%) find it neither easy nor difficult.

A greater proportion of bill payers state that they find it extremely easy to deal with their energy supplier (13% give a score of 10), than those who find it extremely difficult (2% give a score of 0). In all, the mean score given by bill payers was 6.81.

Around six in ten find their supplier easy to deal with overall.

Figure 5.5 – Overall Customer Effort Score



5.7.1 Sub-group differences

As would be expected given the themes already discussed in Section 5.6, Promoters of their supplier and those who trust their supplier are significantly more likely to find it easy to deal with them (score of 7 to 10):

- *Promoters of their energy supplier* (96%) compared to those who are either passive (87%) or detractors (35%).

- *Bill payers who trust their energy supplier* (84%) compared to those who distrust them (13%).

There are also differences depending on age:

- *Bill payers aged 65 and over* (63%) compared to those aged 15 to 64 (57%).

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.

Overall, slightly fewer than half of bill payers trust their energy supplier to provide them with value for money, to address their complaints fairly and be transparent with them. Over half trust that they will receive accurate billing

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.

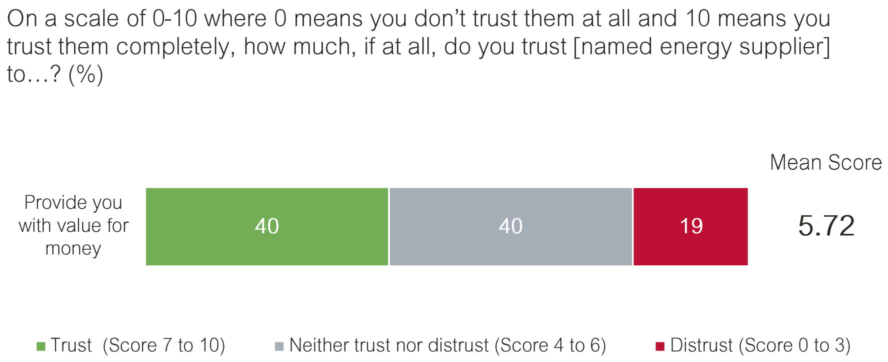
6.2 Trust in energy suppliers to provide value for money

Two in five trust their supplier to give them value for money.

Two in five (40%) bill payers trust their energy supplier to provide them with value for money. Half as many (19%) distrust their supplier to do so, with two in five (40%) neither trusting nor distrusting them (Figure 6.1).

While very few bill payers state that they completely trust their energy supplier to provide them with value for money (8% give a score of 10), more do so than those who don't trust them at all (4% give a score of 0). In all, the mean score given by bill payers was 5.72.

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



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: 1,427).

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

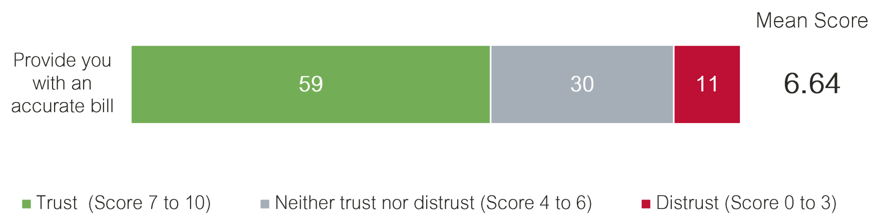
Nearly three in five (59%) bill payers trust their energy supplier to provide them with an accurate bill. Just one in nine (11%) distrust them to do so, with three in ten (30%) neither trusting nor distrusting them (Figure 6.2).

Three in five trust their supplier to provide them with accurate bills.

More bill payers state that they completely trust their energy supplier to provide them with an accurate bill (11% give a score of 10), than those who don't trust them at all (3% give a score of 0). In all, the average score given by bill payers was 6.64.

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…? (%)



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: 1,427).

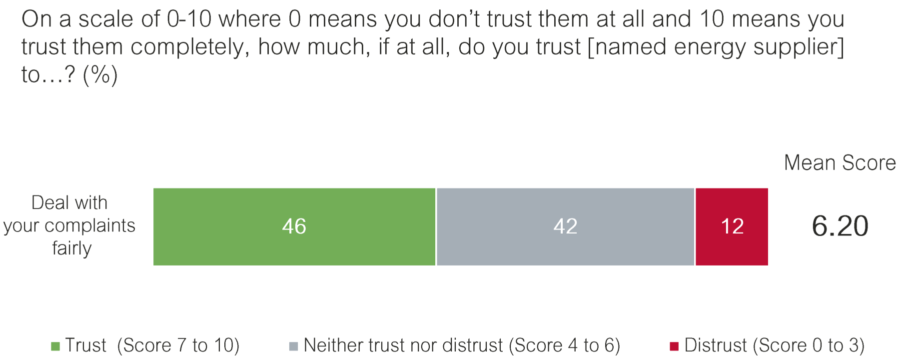
6.4 Trust in energy suppliers to deal with complaints fairly

Nearly half (46%) of bill payers trust their energy supplier to deal with their complaints fairly. Around one in eight (12%) distrust them to do so, with around two in five (42%) neither trusting nor distrusting them (Figure 6.3).

Slightly fewer than half trust their supplier to deal with their complaints fairly; a much smaller proportion distrusts them.

More bill payers state that they completely trust their energy supplier to deal with their complaints fairly (9% give a score of 10), than those who don't trust them at all (2% give a score of 0). In all, the mean score given by bill payers was 6.20.

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



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: 1,427).

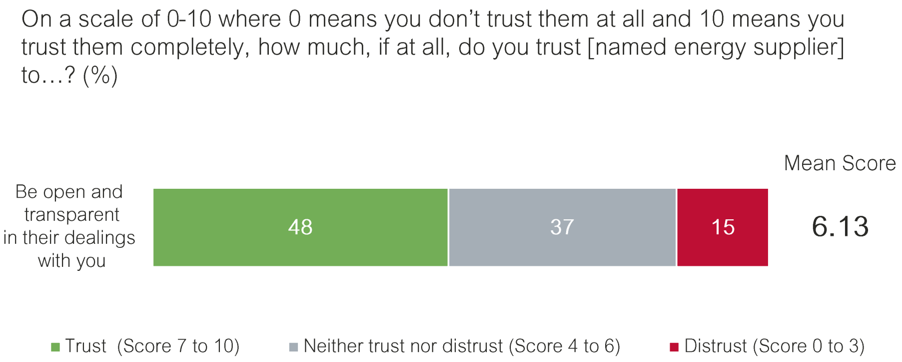
6.5 Trust in energy suppliers to be open and transparent

Around half trust their supplier to be open and transparent with them, more than three times the number that distrusts them.

Just under half (48%) 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 less than four in ten (37%) neither trusting nor distrusting them (Figure 6.4).

More bill payers state that they completely trust their energy supplier (9% give a score of 10), than those who don't trust them at all (3% give a score of 0). In all, the average score given by bill payers was 6.13.

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



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: 1,427).

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. Sub-groups that are more likely to trust their supplier in all four areas of service are:

- *Promoters of their energy supplier* compared to those who are passive and 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.

- *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.

Sub-groups that showed significant differences <u>in some of the areas of service</u> are:

- *Bill payers that have switched energy supplier in the last 12 months* compared to those that have not.

- *Bill payers in social grades A or B* compared those in social grades D or E.

- *Bill payers who have access to the internet* compared to those that do not.

- *Those without any formal qualification* compare to those that do have a formal qualification.

Table 6.1 shows the results for sub-group differences across the four statements. The difference between the group highlighted in green and those not highlighted for each category is statistically significant.

Table 6.1 – Sub-group differences by four trust statements

Measure	Sub-group	Trust (score of 7-10) to…			
		Provide you with value for money	Provide you with an accurate bill	Deal with your complaints fairly	Be open and transparent in their dealings with you
Net Promoter Score	Promoters	80%	83%	80%	84%
	Passive	61%	80%	68%	72%
	Detractors	19%	42%	26%	26%
Customer Trust Score	Trust (Score 7 to 10)	64%	81%	70%	74%
	Distrust (Score 0 to 3)	4%	17%	5%	2%
Customer Effort Score	Easy (Score 7 to 10)	57%	77%	65%	69%
	Difficult (Score 0 to 3)	9%	26%	10%	9%
Switching energy supplier	Switched in the last 12 months	48%	Not significant	Not significant	Not significant
	Have not switched in the last 12 months	39%	Not significant	Not significant	Not significant
Age of bill payer	Aged 65 and over	50%	70%	53%	59%
	Aged 15 to 64	37%	56%	44%	44%
Formal qualifications	No	48%	Not significant	Not significant	54%
	Yes	39%	Not significant	Not significant	47%
Social Grade	A or B	Not significant	66%	Not significant	Not significant
	D or E	Not significant	58%	Not significant	Not significant
Access to the internet	No	52%	Not significant	Not significant	39%
	Yes	38%	Not significant	Not significant	29%

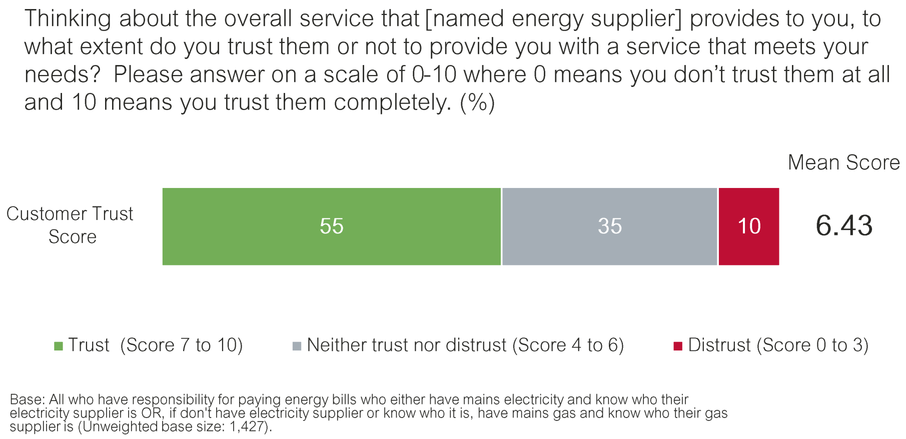
6.7 Overall Customer Trust Score

When asked to think about the overall service their energy supplier provides, just over half (55%) of bill payers trust their energy supplier to provide them with a service that meets their needs. Just one in ten (10%) distrust them to do so, with around a third (35%) neither trusting nor distrusting them (Figure 6.5).

Overall, more than half trust their supplier to provide them with a service that meets their needs. Just one in ten distrust them.

More bill payers state that they completely trust their energy supplier (9% give a score of 10), than those who don't trust them at all (3% give a score of 0). In all, the mean score given by bill payers was 6.43.

Figure 6.5 – Overall Customer Trust Score



6.7.1 Sub-group differences

There are a number of different groups of bill payers who are significantly more likely to trust their energy supplier to provide them with a service that meets their needs (score of 7 to 10):

- *Promoters of their energy supplier* (94%) compared to those who are either passive (79%) or detractors (31%).
- *Bill payers who find it easy to deal with their energy supplier* (78%) compared to those who find it difficult (10%).
- *Bill payers aged 65 and over* (63%) compared to those aged 15 to 64 (52%).
- *Bill payers that have switched energy supplier in the last 12 months* (61%) compared to those that have not (54%).

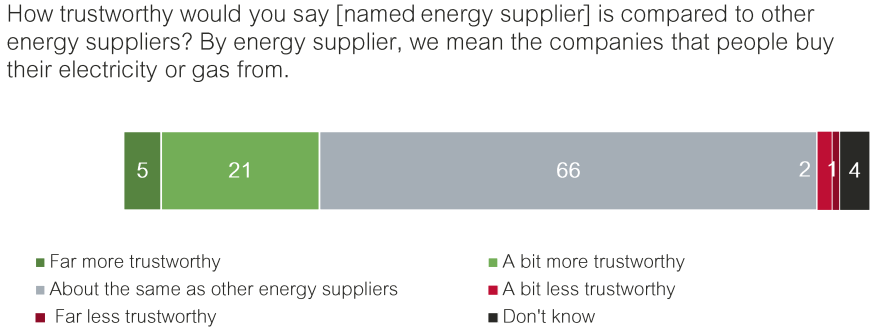
6.8 Relative trust in energy suppliers

Most bill payers state that they trust their energy supplier about the same as other energy suppliers (66%). A quarter (26%) of bill payers state that their energy supplier is more trustworthy, with very few (4%)

Most trust their supplier no more or less than other companies in the energy industry.

believing their energy supplier is less trustworthy than other energy suppliers (Figure 6.6).

Figure 6.6 – Relative trust in energy suppliers



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: 1,427).

6.8.1 Sub-group differences

There are a number of different groups of bill payers who are significantly more likely to consider their energy supplier to be more trustworthy than other energy suppliers:

- *Promoters of their energy supplier* (55%) compared to those who are either passive (37%) or detractors (13%).
- *Bill payers who trust their energy supplier to provide them with a service that meets their needs (36%)* compared to those who distrust their energy supplier (7%).
- *Bill payers who find it easy to deal with their energy supplier* (34%) compared to those who find it difficult (4%).
- *Bill payers that have switched energy supplier in the last 12 months* (35%) compared to those that have not (25%).

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?"* They answered on a scale of 0 (I would definitely not recommend them) to 10 (I would definitely recommend them).[18]

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.

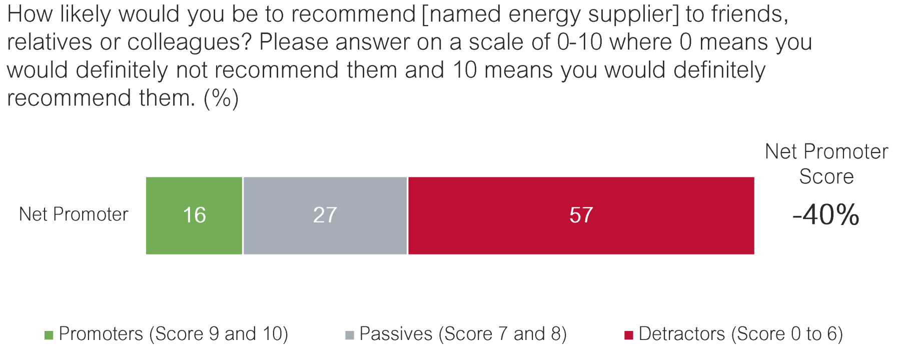
7.2 Likelihood to recommend supplier

Around one in six (16%) are Promoters of their energy supplier. Nearly six in ten (57%) are Detractors, with around a quarter (27%) being Passives (Figure 7.1). As such, the Net Promoter Score is -40%.

One in six would actively promote their supplier to their friends, relatives or colleagues.

[18] 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



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: 1,427).

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 16% are 'Promoters' of their supplier, this broadly matches the proportion that would rate their supplier nine or ten on trust (17%) and only slightly lower than for ease of dealing with suppliers (22%).

Views are generally more critical though; when considering likelihood to recommend using the same scale as used in earlier chapters on customer effort (Section 5.7) and trust (Section 6.7), 18% would be considered critical (score 0 to 3) compared to 10% 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, 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.

7.3 Key drivers of likelihood to recommend supplier

7.3.1 Approach to analysis

As likelihood to recommend is a useful measure to understand the regard in which suppliers are held by their customers, it is also useful to understand the factors that play a part in informing whether a customer will recommend their supplier. Key driver analysis (KDA) was therefore conducted to examine the factors that drive likelihood to recommend (Net Promoter Score).

KDA is a statistical technique which uses multivariate regression to understand which factors most influence a given outcome. In this case, it measures the strength of the relationship between likelihood to recommend and key variables, and enables us to assess the relative importance of different service aspects or qualities in influencing this rating.

The purpose of this analysis is to gather an understanding of why customers would talk highly of their energy supplier – is it because they trust them to deal with their complaints fairly and are other characteristics of the bill payer, such as age or income, important?

It should be noted that any such analysis is always limited by the factors available to examine (e.g. we do not know how long respondents have been with their current supplier, or the way in which they pay their bills, for example). However, the analysis presented in this section does provide some interesting insight into the association between bill payers' likelihood to recommend their energy supplier and their personal circumstances and experiences of dealing with their supplier.

7.3.2 Drivers of likelihood to recommend

The initial round of analysis revealed that the greatest drivers of likelihood to recommend a supplier are the overall experience that customers have with their supplier (Q12 - customer effort score) and the overall trust they have in receiving a service that meets their needs (Q9 - customer trust). In effect, those who highly trust their energy supplier and find them easy to deal with, are also very likely to recommend them to others. The sub-group differences for bill payers who are significantly more likely to be Promoters of their energy supplier illustrate this point:

- Bill payers who trust their energy supplier to provide them with a service that meets their needs (28%) compared to those who distrust their energy supplier (2%).

- Bill payers who find it easy to deal with their energy supplier (27%) compared to those who find it difficult (1%).

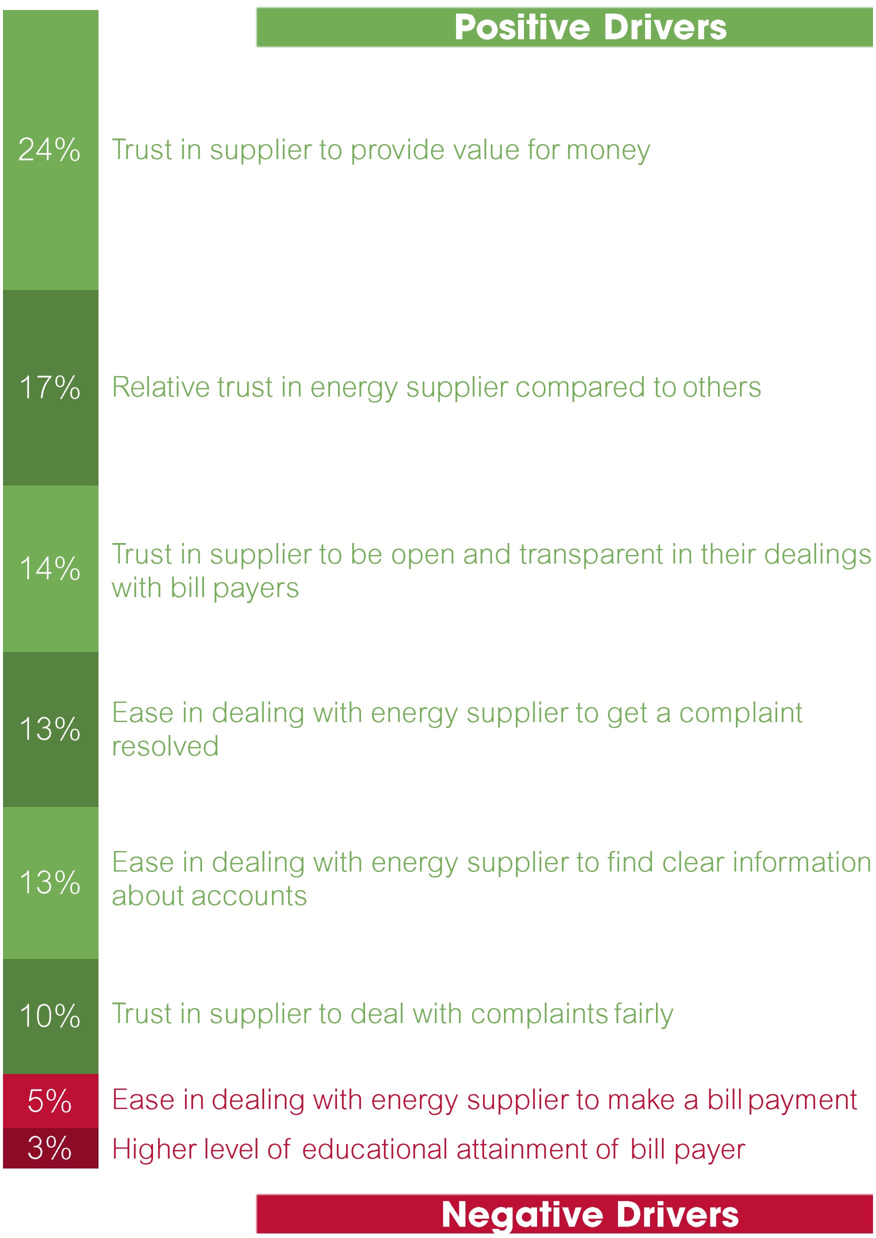
This is unsurprising given that these are both fundamental facets of a positive customer relationship.

These factors are so highly correlated with each other that their inclusion in the KDA model obscures other issues that might be at play and renders the model ineffective. Both Customer Trust Score and Customer Effort Score were therefore removed from the model.

The relative importance of positive drivers (i.e. those things that are more likely to be related to a strong likelihood to recommend) and negative drivers (i.e. those things depressing likelihood to recommend) are shown in Figure 7.2 These are the drivers, ranked in order of the strength of the relationship, that are associated with higher levels of likelihood to recommend.

Bill payers' trust in their energy supplier to provide them with value for money is the most important aspect in their likelihood to recommend them. This is followed by higher trust in energy supplier, relative to others in the industry. The most important negative driver is where customers find it difficult to make a bill payment. Level of educational attainment also acts as a negative driver; those with higher levels of educational qualifications are more likely to be detractors than those with lower or no educational qualifications.

Figure 7.2 – Drivers of likelihood to recommend energy supplier (Net Promoter Score)



While it did not come out of the KDA modelling as one of the most important factors in recommending supplier, switching is also a relevant issue. Bill payers that have switched energy supplier in the last 12 months are significantly more likely to be Promoters of their energy supplier than those who have not switched (26% and 15% respectively). This suggests that, for those who have changed supplier recently, the process generally was perceived to be a relatively straightforward one and helps to improve perceptions of their supplier. However, it should be noted that the Net Promoter Score for this group is still negative (-25% compared to -43% of those who have not tried to switch) indicating that there is still some way to go before a majority of customers would speak highly of their supplier.

8 Conclusions

8.1 Prevalence, and experiences, of switching

- One in six have switched supplier in the last 12 months. A repeat wave of this survey at a later date would be required to assess whether this behaviour is becoming more prevalent or not. Switching is more common among higher social grades, younger rather than older age groups, and is less common among those with lower educational attainment.

- Generally speaking, most customers find the process of switching energy account to be relatively simple, with only one in ten considering it difficult. However, of the small number who have attempted to switch but not successfully completed it, almost half say they found the process difficult. It should be noted that this represents a very small number of people (less than one per cent of everyone surveyed). However, it does suggest that there are a small number of customers who might be failing to switch because they do not find navigating this process simple enough. Broadly speaking, however, the majority who have attempted to switch have not encountered significant problems.

- Recent switchers are more likely to be positive on value for money (48% trust their supplier on this issue, compared to 39% who have not switched). This suggests that this might be a motivating factor for moving supplier, and that customer experiences on value tend to be improved somewhat once they move to a new deal.

8.2 Experiences of suppliers – customer effort and trust

- Customers generally find it easy dealing with their supplier, in particular for making bill payments and providing meter readings (78% and 72% say it is easy respectively). Finding clear information about accounts (12% say it is difficult) and getting complaints resolved (15%) stand out as the areas of the service where customers are more likely to be critical. Overall, three in five (59%) find it easy dealing with their supplier.

- Around half (55%) trust their supplier to provide a service that meets their needs. Perceptions of this are slightly more positive among switchers (61% compared to 54% who have not tried to switch), although there is still progress that could be made even among this group (31% are neutral and 9% distrust).

- A similar proportion of bill payers believe their supplier is open and transparent (48%) and deals with complaints fairly (46%). Customers are slightly more positive about their supplier providing accurate billing (59% trust on this), but views on value for money are slightly more negative; two in five (40%) trust they will receive this, and around one in five (19%) distrust suppliers on this issue.

- Most customers (66%) believe that there is no difference between how trustworthy their supplier is compared to competitors. Around a quarter (26%) feel their supplier is more trustworthy than others, and very few (4%) believe that others would compare more favourably in this respect. Those who have switched in the last year are marginally more positive, with one in three (35%) saying they are with a more trustworthy supplier, compared to one in four (25%) of those who have not tried to switch. Although only based on a small number of respondents[19], those who have tried to switch but did not do so are most critical; one in six (17%) say their supplier is *less trustworthy* than other suppliers (compared to 4% overall). This might indicate that a small number of customers have had a bad experience of switching, or it could reflect part of the reason why they attempted to switch in the first place – that the 'grass is greener'.

8.3 Likelihood to recommend supplier

- While customer's views on being provided with a service that meets their needs and perceptions of ease of dealing with suppliers are broadly positive, relatively few (16%) are likely to recommend their supplier.

- Trust in supplier and finding it easy to deal with them are both strong influencing factors on likelihood to recommend supplier, as might be expected. Following these areas of the service, trust in being given value for money and overall trust relative to others in the industry are the most important aspects in informing likelihood to recommend. Given that value for money is one of the areas of service on which views are more negative, it will be important that customer perceptions of this aspect of the service are maintained or improved.

- Bill payers that are more trusting of their supplier to provide a service that meets their needs, and who find it easy dealing with their supplier are both more likely to be promoters (27% and 28% respectively). One in three (35%) of those who trust their supplier more compared to other suppliers are also more likely to recommend. These customers, although more positive, are still relatively unlikely to recommend their supplier to friends, family or colleagues. On the

[19] Unweighted base size of 25

whole, customers are currently unlikely to recommend their energy supplier to others.

9 Appendices

9.1 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

TRUST

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

CUSTOMER EFFORT SCORE

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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