



# ENERGY MARKET INVESTIGATION

Technical Report on a survey conducted for the  
Competition and Markets Authority by GfK NOP.

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# 1 Sampling

1. The aim of the research was to represent all households in Great Britain with either one or both of mains electricity and mains gas, with the following exclusions:
  - those where decisions about energy supplier were made by a landlord
  - holiday homes and other non-primary residences
2. The target sample was 7,000 interviews, a figure driven by the requirement to include around 500 interviews in each of the 14 energy regions created after the deregulation of the industry in 1990, to allow regional analysis. There was also a requirement to be able to analyse by supplier type, and in particular between incumbent and non-incumbent suppliers.

## 1.1 Sample source

3. The sample was drawn from energy supplier customer records, and to ensure as wide a coverage as practicable, all the six major energy suppliers were asked to provide their full domestic customer lists, as were the largest four of the minor suppliers. The suppliers whose customers were included in the survey were:
  - British Gas/Centrica/Scottish Gas
  - EDF Energy
  - E.ON
  - RWE Npower
  - Scottish Power
  - SSE
  - Cooperative Energy
  - First Utility
  - Ovo Energy
  - Utility Warehouse.
4. The CMA used its statutory powers to require the ten suppliers to provide details of all account holders, including unique reference numbers, full contact details, and some information on energy type and usage. Data from the suppliers were sent direct to GfK NOP and in line with standard GfK policy and procedures steps were taken to preserve the security of the customer data, including password protection of the files and limiting access to the files to only those working directly on this project.
5. Data were requested from suppliers in two stages. The first contained enough information for sampling and interviewing to take place, while the second contained much more detailed information on energy usage and costs, to be used as part of the analysis of survey results, and was requested only for the much smaller number of customers who had been sampled. The data supply template is included as Appendix A
6. At the first stage the suppliers sent GfK NOP the following variables for all their customers:
  - Internal customer URN
  - Customer name and contact information
  - Billing and supply addresses for electricity and gas

- Tariff type
  - Payment information
7. As each file was received it was checked to ensure all fields matched the template, and any necessary editing was carried out so that individual files could be loaded into a single master file.

## 1.2 Sample eligibility

8. It was decided that landlords who were responsible for the energy supply to their rental properties would not be included in the survey, although tenants who were responsible for their own energy supply were included. It was originally intended to identify landlords by finding cases where the supply address was different from the billing address, but the inconsistency in the recording of addresses meant that this was not possible even using fuzzy matching. Instead a decision was taken to exclude all cases where the supply postcode was different from the billing postcode. This meant that landlords of properties in the same postcode as their own address would not be excluded, but the questionnaire enabled such cases to be screened out at the start of the interview.
9. The removal of addresses that were not main homes – holiday homes, business properties and so on – was achieved through a screening question at the start of the interview
10. A screening question was also included to identify cases where residents were not responsible for dealing with the energy supplier or for decisions about energy – typically elderly people where this role was fulfilled by their children – and in these cases the interview was conducted instead with the non-resident decision maker if that was possible.
11. It was necessary to ensure that people with electricity and gas from two different suppliers had no more chance of being selected than those who had both fuels from the same supplier. In all cases where a customer was shown as having both fuels from a single supplier that entire record was duplicated in the sample file. The first instance was flagged as electricity supply and the second as gas. This was done to determine which was each respondent's "sampled fuel" and was therefore asked about in certain parts of the interview.

## 1.3 Stratification

12. This master file was stratified first by energy region, and then by fuel – either electricity or gas. This meant that any household with mains gas and mains electricity, whether from one supplier or two, would appear once in the electricity part of the file and once in the gas part (except for the small proportion who received one fuel from a supplier outside of the ten included in the sampling frame).
13. Within each of the resulting 28 strata (14 region by 2 fuel types) we then stratified as follows:
- Electricity strata
    - British Gas
    - Incumbent (legacy) electricity supplier for that region
    - Other major supplier
    - Minor supplier
  - Gas strata
    - British Gas
    - Incumbent (legacy) electricity supplier for that region

- Other major supplier
  - Minor supplier
14. There were thus 8 cells within each region, and so 112 cells in all.
  15. Because the market is dominated by the six major suppliers, the minor suppliers needed to be oversampled in order to produce enough interviews for this group to be looked at with reasonable confidence. Numbers of energy customers also varied considerably across the 14 regions and, as mentioned above, a target achieved sample was set of 500 interviews per region to enable robust regional analysis to be conducted.
  16. The CMA required that a random probability sampling approach be used and supplied a sample design, based on a total target achieved sample of 7,000 and including a minimum target number of interviews – chosen to allow sub-analysis with acceptable confidence intervals – within the smaller cells. Target numbers for the larger cells were then calculated pro rata to their population, and a sampling fraction was calculated for each cell.
  17. This design meant that people with different suppliers for electricity and gas had practically the same chance of getting into the sample as those with one supplier for both gas and electricity. However people who had mains electricity but not mains gas, or vice versa, had only half the chance of getting into the sample, and so corrective weighting was needed in any analysis of the energy market as a whole, as described in section 4 below
  18. Corrective weighting was also needed to restore the sample strata back to their proportions in the universe, and this is discussed in more detail in section 4.
  19. Because we could not guarantee any particular response rate, and because it would have been impractical to go back to the suppliers to ask for tranche two data on more customers, a sample size of 105,000 was agreed as being almost certain to contain enough customers to achieve 7,000 interviews, without an excessive safety margin.
  20. Before being issued the sample was examined for cases where the “deceased” indicator was set, or where the contact name was “Executors of ...” or “The Occupier” and these were removed from the sample. Cases with no valid telephone number, or no telephone number at all, were also removed. This meant that the sample issued to the telephone interviewing system consisted of 95,470 cases.
  21. As we would not know the response rate until some way into fieldwork, the sample was split into 9 equal-sized systematic sub-samples, so that the sample could be issued in as many tranches as necessary, without risk of biasing the results should events cause any difference in responses from the beginning of the field period to the end.
  22. As discussed in more detail in Section 3, part of the final tranche was held back, with no letters sent to households, as it was estimated that the target sample could be achieved by issuing fewer than 95,470 cases.

## 2 Questionnaire development

23. The first draft of the questionnaire was produced by GfK after meeting with CMA, discussing the main aims of the survey and what could realistically be obtained from an interview with energy customers lasting no more than about 20 minutes on average.
24. After a series of further meetings, and internal discussions at both CMA and GfK, an agreed draft questionnaire was produced and sent by the CMA to suppliers and other parties to the investigation on 5 September 2014 (and published on the gov.uk website on the 8<sup>th</sup>), for comments back by 9 September.

### 2.1 Questionnaire piloting

25. Because of the tight timetable, the first stage of questionnaire testing began before comments were received back. This took the form of cognitive interviews, with the aim of testing respondent understanding of the questions and the ease with which they could answer them.
26. Twelve telephone cognitive interviews were conducted in all, some by members of the GfK research team working on the energy survey, and some by a specialist in cognitive interviewing for social research projects at GfK. Respondents received a £20 incentive for participating.
27. The cognitive interviews followed a standard cognitive format of asking some sections of the questionnaire exactly as in the draft questionnaire and then following up with a later discussion to clarify any areas where there might have been misunderstanding or difficulty in answering
28. All cognitive interviews were recorded, and CMA staff listened in either live or via recording to some of the interviews.
29. At the end of the cognitive stage recommendations were made for changes to the questionnaire, and these were combined with comments received from suppliers and other parties to the investigation which the CMA considered merited attention, to produce a near-final draft of the questionnaire.
30. This was then scripted for Computer Aided Telephone Interviewing (CATI) and tested in a pilot study. Pilot interviewing took place at GfK's telephone centre in central London. Interviewers were briefed by the GfK research team, with CMA staff present to explain the aims of the survey and to answer queries that arose. The pilot briefing took place on September 22, and interviewing continued until September 24. In total 55 interviews were conducted.
31. Following the pilot, discussions were held between CMA and GfK to resolve any remaining problems that emerged during the pilot interviews, and a further series of amendments was made to the questionnaire to produce the version for use in main fieldwork.
32. Because there were still some difficulties reported by interviewers during the early days of fieldwork, a small number of additional changes were made to the questionnaire during the first week of fieldwork.
33. The final questionnaire took on average 20 minutes to administer. A copy of the final questionnaire is included as Appendix B.

## 3 Fieldwork

34. Given the number of interviews required, and the time and budget available, telephone interviewing was the chosen method of data collection. Face to face interviewing would have

been excessively costly and taken too long, and there were concerns that an online survey would risk over-sampling those who had switched supplier.

35. All members of the issued sample (except the 8,864 that were withdrawn as discussed below) were sent an advance communication on CMA letterhead before being called. Where an email address was included in the contact details from suppliers the letter was sent via email, otherwise it was sent by post. A copy of the advance letter is included as Appendix C.
36. The purpose of the advance letter was two-fold a) To explain that this was an important and completely genuine research study and b) to provide a simple and efficient means of opting out of the research should they wish to via a Freephone telephone number or an email address. In all 5,225 people said they did not wish to take part. Their cases were removed from the live sample once the message had been read/listened to.
37. Interviewing began on September 30 and continued until November 17 2014, at GfK's two telephone centres in Luton and central London. All interviewers were comprehensively briefed before starting work. There were large-scale briefings at the start of fieldwork, with top-up briefings conducted during fieldwork as new interviewers were added to the project. A total of 183 interviewers worked on the project over the course of the 7 week period.
38. The briefing covered all aspects of the survey, providing interviewers with background to the survey, the objectives, and the source of the sample. The briefing also included a question-by-question overview of the questionnaire, allowing interviewers to familiarise themselves with the content and ask questions of the research team
39. The original plan was for all interviewing to take place in the evenings and at weekends, but a shortage of interviewers at the start of the project meant that some interviewing was conducted during the afternoons to ensure that fieldwork was completed on time. Because of concern that this might lead to an oversampling of older respondents an ongoing check was kept of the age distribution of the afternoon interviews, but these were not significantly different from evening ones.
40. All interviewing was subject to GfK's normal quality control procedures, which meet or exceed the requirements of the Market Research Society Interviewer Quality Control Scheme. Interviewers worked in teams with a team leader to every 10 interviewers, with team leaders monitoring a proportion of live interviews and also responding to interviewer queries. During monitoring the team leaders can hear the questions being asked, the answers given by respondents, and the outcome recorded by the interviewers.
41. In addition to this GfK researchers listened in to some interviewers, and CMA staff made a number of trips to both centres during fieldwork to listen in.
42. The sample was issued to the telephone centres in a series of separate tranches. Within each tranche the Sample Management System (SMS) issued cases to interviewers in such a way as to ensure that throughout fieldwork the number of cases issued from each sample stratum was in proportion to the total number of cases in that stratum. The last tranche was not completely issued as it was judged enough had been issued to achieve the target number of interviews. In the end there were 8,864 cases from the final sub-sample that were not dialled as it was calculated the target sample could be achieved without them, so the total number of households attempted was 86,606.
43. Because of the need to conduct such a high volume of fieldwork in a fixed period there were a number of "live cases" when fieldwork was stopped, including soft appointments where a customer had asked to be called back at a vague time such as "in a week or so". These are classified as "other non-interview" in the table below.

44. A total of 7,001 interviews were conducted. Two respondents decided after being interviewed that they did not wish their answers to be kept, so they were removed from the data before analysis, and the final number of interviews included in the dataset was thus 6,999.
45. These 6,999 interviews represent a response rate of 9.8% of the eligible sample. After the removal of non-valid or wrong numbers, the breakdown of the sample is shown in the table below. A full list of the detailed outcome codes that comprise each of the outcome summaries below is given as Appendix D:

<b>Issued sample</b>	86,606	100%
Wrong numbers/non-residential	14,828	17.1
<b>Eligible sample</b>	71,778	100%
Asked to be removed from survey	5,348	7.5%
Refused when telephoned	28,506	39.7
Other non-interviews	30,925	43.1
Interviews	6,999	9.8%

## 4 Analysis

46. The first stage of the analysis was the back-coding” of ‘other answers’ at open pre-coded questions. In a small number of cases the back-coding was to a code that formed part of a filter to a later question. In these cases the tables show a “not answered” row for people whose back-coded answer meant they should have been asked that question, but were not because they had originally been coded as “other”. There were also a small number of cases where “missing data” arose because of minor changes made to the questionnaire after fieldwork started., some from the first tranche discussed above, and second from the more detailed tranche of usage and tariff data sent to GfK by the suppliers for each of the 105,000 sampled cases
47. The survey data were then merged with the data received from the suppliers, both from the first tranche used to draw the initial sample, and from the more detailed data from tranche two. This covered
- Whether special case such as vulnerability indicator
  - Electricity and gas meter type
  - Electricity and gas tariff details
  - Electricity and gas usage information
  - Electricity and gas discounts

- Switching behaviour<sup>1</sup>
48. A specification for the computer tables, involving cross-analysis of survey response against responses to other survey question and data supplied by the energy companies was agreed between CMA and GfK. Appendix E contains definitions of the crossbreaks used.
  49. Tables were first run and checked unweighted, and then weights were applied, some (stratification weights) to correct for differential chances of inclusion in the survey sample due to intentional over or under-sampling of strata, and others (post-stratification weights) to attempt to correct for differential non-response potentially biasing the results.
  50. Stratification weighting consisted of two separate weights. The first was a weight applied to correct for the over-sampling of certain energy companies' customers, certain regions and fuel types (gas customers were over-sampled compared to electricity customers). For each of the 112 cells in the stratification design, the weight was calculated by dividing the proportion of the universe of all customers that was in that cell by the proportion of the issued sample that was in that cell. Details of the first stratification weight are include as Appendix G
  51. The second stratification was a weight of 2 that was applied to all respondents who had only one of mains gas and mains electricity, as they had only half as much chance of appearing in the sample as those with both mains gas and mains electricity.
  52. Similarly, there were two levels of post-stratification weighting. The first reflected a concern that those who were more engaged in the market would be more likely to take part in the survey, which in turn could lead to non-response bias, overstating the level of switching and/or shopping around.
  53. Non-response introduces bias if there are differences across possible respondents in both the answers they give (or would give) and their likelihood of responding to the survey. To counter this, respondents were weighted according to the inverse of their estimated likelihood of responding. These response likelihoods were estimated from a regression model which compared respondents to non-respondents using data which were available for both groups.
  54. Full details of the analysis carried out by the CMA to estimate response propensity weights are included at Appendix F, but in summary, a propensity adjustment cell approach was used to adjust for non-response. The main steps in the methodology were as follows:
    - a) Prepare data for analysis.
    - b) Determine appropriate regression model through exploratory analysis.
    - c) Estimate a logistic regression model of response on the explanatory variables.
    - d) For each unit, estimate the predicted response propensity using the coefficients from the model.
    - e) Order units by their estimated response propensity and divide the units into 5 equally sized cells on the basis of their response propensity.
    - f) Assign each cell a weighting equal to the inverse of the average response propensity.
    - g) Use these weightings to adjust for non-response in the analysis of survey data.

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<sup>1</sup> Full details of the information supplied are given in appendix A

55. The CMA discussed their proposed approach to this weighting with GfK and the detailed methodology was reviewed by GfK's lead statistician who considered it to be appropriate.
56. The second post-stratification sought to correct the age balance of the achieved sample. As with most surveys, younger people were less represented in the achieved sample than older ones. Since the universe of interest was "people responsible for decisions about domestic energy in GB" there are no readily-available statistics on the demographic make-up of this universe. However, the Ofgem Retail Market Review Baseline Survey had been conducted in 2014 using a nationally representative in-home survey by TNS BMRB which was itself weighted to the large-scale National Readership Survey, and which asked screening questions to filter out those who were not sole or joint decision-makers about energy. CMA obtained from the Ofgem dataset a weighted age breakdown of the sample they interviewed after the screening, and weights were applied to bring the age distribution of the interviewed CMA sample into line. A small amount of estimation was necessary because the two surveys used slightly different categories among the upper age groups, and the RMR survey included a small number of 16 and 17-year olds, while the CMA survey only interviewed those 18 and over. Once calculated, the weights were finally recalibrated to take account of the 1.4% who refused to give their age in the CMA survey, and who were given a weight of 1.
57. The age weights applied were as follows:

	RMR Baseline Survey <sup>2</sup>	CMA survey <sup>3</sup>	Weight
18-24	5.0	1.9	2.63
25-34	13.8	11.5	1.20
35-44	17.3	15.9	1.09
45-54	19.8	21.6	0.92
55-64	14.7	21.4	0.69
65-79	21.9	23.2	0.94
80+	7.6	4.5	1.69

58. The weights were applied to each respondent sequentially – first the stratum weight, then the single fuel weight, the non-response weight provided by CAM, and finally the age weighting. This then produced a single composite weight for all respondents.
59. Because the non-response weights averaged greater than 1, the net effect of the composite weight was to increase the weighted sample size well above the unweighted sample size, and scaling was used to bring the weighted sample back down to 7,000
60. Any weighting of survey data is likely to decrease the precision of the survey estimates as it reduces the effective sample size. Mainly because of the level of oversampling of the smaller strata the overall weighting efficiency was only 59%, meaning that for the purposes of calculation

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<sup>2</sup> Recalibrated to create age groups 65-79 and 80+

<sup>3</sup> After removal of refusals

significant differences the effective sample size was 4,157. The survey design described above, and the target achieved sample size of 7,000 in particular, reflected the expectation of a reduction in effective sample size for statistical analysis of this order.

61. Once the tables had been checked an SPSS data file was produced to form one of the survey outputs. Names and contact details were removed from the file before it was provided to the CMA for further analysis.
62. To remove the risk that any individual customers might be identified, all cells where the column base was lower than 30 or where results were shown for individual suppliers were suppressed and rows containing any unique responses to survey questions were combined with other responses before the tables were published.



## APPENDIX A – DATA REQUEST TO SUPPLIERS

### CMA Energy Market Investigation: Retail, domestic List of current domestic customers

**Energy  
supplier**

Please  
select:


Date extracted from  
database:

Time extracted from  
database:

		<u>Data request tranche number</u>	<u>Variable number</u>	<u>Variable name</u>	<u>Answer lists / Answer format / Units</u>	<u>Definitions</u>	<u>Notes &amp; Instructions</u>
Customer information	Customer contact information	1	1	<b>Customer URN</b>	Free text		The customer URN can be chosen at your discretion. It is fundamental that the URN enables you to match the data obtained in the first stage of the data request to the data obtained at the second stage data request.



1	2	<b><u>Customer name</u></b>	Free text
1	3	<b><u>Main customer contact name</u></b>	Free text
1	4	<b><u>Primary contact number</u></b>	Free text
1	5	<b><u>Date last verified</u></b>	dd/mm/yyyy
1	6	<b><u>Second contact number</u></b>	Free text
1	7	<b><u>Date last verified</u></b>	dd/mm/yyyy
1	8	<b><u>Third contact number</u></b>	Free text
1	9	<b><u>Date last verified</u></b>	dd/mm/yyyy
1	10	<b><u>Fourth contact number</u></b>	Free text
1	11	<b><u>Date last verified</u></b>	dd/mm/yyyy
1	12	<b><u>Fifth contact number</u></b>	Free text

This may include title/salutation, forenames, middle names, initials and surnames of customer/s. If there are multiple names, please separate them with a semi-colon. We understand some suppliers can provide the main customer contact name in the case of accounts with multiple names. Please complete this field even if such information is not available by repeating the 'Customer name'.

This refers to the number most likely to result in contact, if known. May be number specified by customer or from experience of supplier.

Please include landline and mobile telephone numbers and home and work telephone numbers. Please provide as many contact numbers as you hold, leaving blank the remaining fields available or all fields if no contact number is available. Please provide the date at which the contact number was verified if this is available, otherwise please leave it blank.



	1	13	<b><u>number</u></b>			
	1	14	<b><u>Date last verified</u></b>	dd/mm/yyyy		
	1	15	<b><u>Primary e-mail address</u></b>	Free text		Please provide as many e-mail addresses as you hold, leaving blank the remaining fields or all fields if no e-mail address is available.
	1	16	<b><u>Date last verified</u></b>	dd/mm/yyyy		
	1	17	<b><u>Second e-mail address</u></b>	Free text		
	1	18	<b><u>Date last verified</u></b>	dd/mm/yyyy		
	1	18	<b><u>Deceased indicator</u></b>	0/1	1 = deceased, 0 = otherwise	Please complete if this information is available. Otherwise please leave blank.
Other customer information	2	19	<b><u>Registered on Priority Services Register (PSR)</u></b>	0/1	1 = registered on PSR, 0 = otherwise	This is to flag customers listed on the PSR. This includes domestic customers who: i) are of pensionable age, disabled or chronically sick; and ii) have either a) asked themselves to be added to the PSR or b) had a person ask on their behalf to be added to the PSR. We understand that suppliers may go beyond the license requirements in terms of who they accept onto the PSR. Customers registered on the PSR should be marked as 1 even if the supplier goes beyond the license requirements.





				(15), North Western England (16), Northern Scotland (17), Southern Scotland (18), South Eastern England (19), Southern England (20), Southern Wales (21), South Western England (22), Yorkshire (23)	
Energy information	Energy supply information	1	23	<b><u>Multiple property indicator</u></b>	0/1  1 => 1 supply property, 0 = otherwise  Please generate this indicator if you are able to from the information you hold. Customers with multiple properties receiving energy supply from the same supplier should be marked as 1. This is for sampling purposes as we aim to survey customers about their main/primary residence.



Customers with multiple properties receiving energy supply from the same supplier will have multiple rows in the data template.

The property URN can be chosen at your discretion. It is fundamental that the URN enables you to match the data obtained about the property in the first stage of the data request to the data obtained about the property at the second stage of the data request.

We are defining main/primary residence as the property where the customer lives. Some suppliers indicated they are able to provide such information for customers with multiple properties. If this information is not available for customers with multiple properties please leave it blank. For customers with multiple properties for whom the main / primary residence can be identified this will be one of the 'Property supplied URNs'. For customers with one property this will be identical to the 'Property Supplied URN'.

1	24	<b><u>Property supplied URN</u></b>	Free text
1	25	<b><u>Main / primary residence property supplied URN</u></b>	Free text



		1	26	<u>Dual fuel supply indicator</u>	0/1	<p>1 = receiving gas and electricity from same supplier, 0 = otherwise</p> <p>1 = receiving electricity only from supplier, 0 = otherwise</p> <p>1 = receiving gas only from supplier, 0 = otherwise</p>	<p>Dual fuel supply refers to customer receiving electricity and gas from the same supplier. Electricity supply only refers to customer receiving only electricity from the supplier. Gas supply only refers to customer receiving only gas from the supplier. This should be answered at property level. Check options are mutually exclusive.</p>
		1	27	<u>Electricity supply only indicator</u>	0/1		
		1	28	<u>Gas supply only indicator</u>	0/1		
Electricity information	Electricity billing information	1	29	<u>Electricity postal billing address line 1</u>	Free text	<p>Five lines are available for the electricity postal billing address. If the electricity postal billing address is less than 5 lines please leave the remaining lines blank. The postcode must be supplied in the separate field and in the Royal Mail format, so for example WC1B (space) 4AD</p>	
		1	30	<u>Electricity postal billing address line 2</u>	Free text		
		1	31	<u>Electricity postal billing address line 3</u>	Free text		
		1	32	<u>Electricity postal billing address line 4</u>	Free text		
		1	33	<u>Electricity postal billing address line 5</u>	Free text		
		1	34	<u>Electricity postcode for billing address</u>	Free text		



Electricity supply information	1	35	<b><u>Electricity postal supply address line 1</u></b>	Free text		Five lines are available for the electricity postal supply address. If the electricity postal supply address is less than 5 lines please leave the remaining lines blank. The postcode must be supplied in the separate field provided and in the Royal Mail format, so for example WC1B (space) 4AD.
	1	36	<b><u>Electricity postal supply address line 2</u></b>	Free text		
	1	37	<b><u>Electricity postal supply address line 3</u></b>	Free text		
	1	38	<b><u>Electricity postal supply address line 4</u></b>	Free text		
	1	39	<b><u>Electricity postal supply address line 5</u></b>	Free text		
	1	40	<b><u>Electricity postal supply address</u></b>	Free text		Customers with more than 1 electricity meter will have multiple rows in the data template. The smart meter indicator refers to smart meters which communicate directly with the supplier so no meter readings are required. If a customer has a smart meter but it is treated as a 'dumb' meter the smart meter indicator should be marked 0. The multi-rate indicator includes, for example, economy 7
	1	41	<b><u>Electricity meter URN (MPAN)</u></b>	Free text		
	2	42	<b><u>Electricity meter type - standard (single rate)</u></b>	0/1	1 = standard (single rate), 0 = otherwise	
	2	43	<b><u>Electricity meter type - multi-rate</u></b>	0/1	1 = multi-rate, 0 = otherwise	
2	44	<b><u>Electricity meter type - pre-payment</u></b>	0/1	1 = pre-payment, 0 = otherwise		



	2	45	<u>Electricity meter type - smart</u>	0/1	1 = smart, 0 = otherwise	and economy 10 meters. Check options for standard (single rate) and multi-rate are mutually exclusive. These variables are about the meter type. If for example a customer with a multi-rate meter has chosen to be billed as if they had a standard (single rate) meter this should still be marked as a multi-rate meter.
	2	46	<u>Electricity meter type - other</u> <u>If 'other' electricity meter type, please specify</u>	0/1	1 = other meter type, 0 = otherwise	
	2	47		Free text		
Electricity tariff information	1	48	<u>Electricity tariff type - variable charges</u>	0/1	1 = variable charges, 0 = otherwise	Variable tariff is defined as a tariff with a rate that can vary over time. Fixed tariff is defined as a tariff that guarantees a fixed price until a defined end date. This does not include tariffs that have an expiration date but allow the price to vary. Capped tariff is defined as a tariff that guarantees a price no higher than a pre-determined level, until a defined end date. These definitions include both the unit rate and standing charge. Check options are mutually exclusive.
	1	49	<u>Electricity tariff type - fixed charges</u>	0/1	1 = fixed charges, 0 = otherwise	
	1	50	<u>Electricity tariff type - capped charges</u>	0/1	1 = capped charges, 0 = otherwise	



1	51	<b><u>Electricity tariff type - green</u></b>	0/1	1 = green, 0 = otherwise
1	52	<b><u>Electricity tariff type - other</u></b>	0/1	1 = tariff type other, 0 = otherwise
1	53	<b><u>If 'other' electricity tariff type, please specify</u></b>	Free text	
1	54	<b><u>Name of electricity tariff</u></b>	Free text	
2	55	<b><u>Electricity tariff unit rate</u></b>	£ per kWh	
2	56	<b><u>Electricity tariff unit rate 2</u></b>	£ per kWh	

Green tariff is defined as a tariff that comes with a promise by the supplier to either meet the customer's usage with generation from renewable energy sources, or to contribute to environmental schemes. This should include all tariffs whose primary marketed attribute is being 'green' or 'sustainable', regardless of whether the 'green' status of that tariff has been accredited by certain external institutions.

This should only be completed for tariffs with multiple unit rates. This may include customers with multi-rate meters who are billed using multiple unit rates. The second unit rate provided should be completed for the night or off-peak rate.



	2	57	<b><u>Electricity tariff daily standing charge</u></b>	£ per day		
	2	58	<b><u>Electricity tariff daily standing charge 2</u></b>	£ per day		This should only be completed for tariffs with multiple standing charges.
	2	59	<b><u>Tariff Comparison Rate (TCR) - Electricity</u></b>	£ per KWh		This should only be completed for tariffs which are required to have a TCR. We understand TCRs are based on average consumption figures and therefore expect the TCR to be consistent across customers on the same tariff.
	2	60	<b><u>Exit/termination fee indicator - Electricity</u></b>	0/1	1 = termination fee applies, 0 = otherwise	
	2	61	<b><u>Exit/termination fee amount - Electricity</u></b>	£		
	2	62	<b><u>Electricity tariff start date</u></b>	dd/mm/yyyy		This refers to the start date of the tariff itself rather than the date at which the customer joined the tariff. If the tariff is evergreen please mark as 0.
	2	63	<b><u>Electricity tariff end date</u></b>	dd/mm/yyyy		This refers to the date at which the tariff ceases to apply to the customer. If the tariff is evergreen please mark as 31/12/9999.
Electricity consumption and expenditure	2	64	<b><u>Most recent estimated annual electricity</u></b>	KWh/year		If EAC is unavailable please provide an alternative internal estimate.



**consumption  
(EAC)**

2 65 **Internal  
estimate  
indicator** 0/1 1 = internal  
estimate of  
electricity  
consumption,  
0 = otherwise

**Date of most  
recent  
estimated  
annual  
electricity  
consumption  
(EAC)**

2 66 dd/mm/yyyy

**Projected  
electricity  
expenditure in  
next 12 months  
based on most  
recent  
estimated  
annual  
electricity  
consumption  
(EAC)**

2 67 £

If the 'Most recent estimated annual electricity consumption (EAC)' is based on an internal estimate due to the EAC being unavailable this should be marked 1.

To be calculated from most recent EAC (or internal annual electricity consumption estimate). The calculation should be: EAC (or internal annual electricity consumption estimate) multiplied by unit rate, plus daily standing charge multiplied by 365 days, minus discounts. Do not make an adjustment for the contract end date; rather assume the customer is on the same tariff being charged the same unit rate and standing charge and receiving the same discounts as currently for the next 12 months. For example, a customer consuming 3,200 kWh per year of electricity on a tariff



with a unit rate of 12p per kWh and a standing charge of 20p per day and receiving a paperless billing discount of £5 per year will have a projected electricity expenditure in the next 12 months of £452

$$(452=(3,200*0.12)+(0.2*365)-5).$$

2	68	<b><u>Previous year's estimated annual electricity consumption (EAC)</u></b>	kWh/year
---	----	--	----------

2	69	<b><u>Internal estimate indicator</u></b>	0/1
---	----	---	-----

1 = internal estimate of electricity consumption, 0 = otherwise

Please provide this for approximately 12 months prior to the 'Most recent estimated annual electricity consumption (EAC)'. If EAC is unavailable please provide an alternative internal estimate. Please leave this blank if the customer did not receive their electricity supply from you in the previous year.

If the 'Previous year's estimated annual electricity consumption (EAC)' is based on an internal estimate due to the EAC being unavailable this should be marked



1.

			<b><u>Date of previous year's estimated annual electricity consumption (EAC)</u></b>	dd/mm/yyyy	
Electricity switching behaviour	2	70			
	2	71	<b><u>Date became electricity customer</u></b>	dd/mm/yyyy	This should refer to the most recent account opening i.e. not the first account opened if customer left and then came back. If possible, please provide the date at which the customer started receiving electricity supply from you. If the date at which the customer started receiving supply is unavailable please provide the sales date. If neither is available please leave blank. As detailed, we would prefer the 'Date became electricity customer' to correspond to the date at which the customer started receiving electricity supply from you. However, if this is not available and the sales date is provided instead, this should be marked 1. If no 'Date became electricity customer' is provided please leave blank.
	2	72	<b><u>Sales date indicator</u></b>	0/1	1 = date became electricity customer based on sales date, 0 = otherwise



			Centrica, RWE Npower, Scottish Power, SSE, E-ON, EDF, Co- operative Energy, First Utility, Ovo Energy, Utility Warehouse, Other, DK
2	73	<b><u>Name of previous electricity supply company If 'other' previous electricity supply company, please specify</u></b>	
2	74		Free text
2	75	<b><u>Date joined current electricity tariff</u></b>	dd/mm/yyyy

Please use the supplier names as listed.

This refers to the date at which the tariff started to apply to the customer rather than the sales date. This should be completed for all customers even if the date of becoming an electricity customer and the date of joining the current tariff are exactly the same.



			<b><u>Date of most recent electricity tariff switch within supplier</u></b>	dd/mm/yyyy
2	76			

			<b><u>Number of electricity tariff switches within supplier between 1st July 2011 and 31st July 2014 (inclusive)</u></b>	Free text
2	77			

This refers to the date at which the tariff started to apply rather than the sales date. This should only include proactive switches i.e. exclude those where customers were automatically moved onto a new tariff due to the end of an existing one. For example, if a customer is moved onto a new tariff because their fixed tariff comes to its end date this would not be considered a proactive switch. If information on proactive switches is unavailable and cannot be derived from other information please provide the date of the most recent switch recorded.

This should only include proactive switches i.e. exclude those where customers were automatically moved onto a new tariff due to the end of an existing one. For example, if a customer is moved onto a new tariff because their fixed tariff comes to its end date this would not be considered a proactive switch. If information on proactive switches is unavailable and cannot be derived from other information please provide information on the total number of switches.



	2	78	<b><u>Number of electricity tariff switches within supplier since 2009 (or company start date if after 2009)</u></b>	Free text		<p>This should only include proactive switches i.e. exclude those where customers were automatically moved onto a new tariff due to the end of an existing one. For example, if a customer is moved onto a new tariff because their fixed tariff comes to its end date this would not be considered a proactive switch. If information on proactive switches is unavailable and cannot be derived from other information please provide information on the total number of switches.</p> <p>As detailed, we would prefer the 'Number of electricity tariff switches within supplier between 1st July 2011 and 31st July 2014 (inclusive)' and 'Number of electricity tariff switches within supplier since 2009 (or company start date if after 2009)' variables to only include proactive switches. If it is number of proactive switches only that has been provided please mark as 1. If the number of all switches has been provided please mark as 0.</p>
	2	79	<b><u>Proactive switch indicator</u></b>	0/1	1 = proactive switch(es), 0 = otherwise	
Electricity payment information	1	80	<b><u>Electricity payment method - direct debit</u></b>	0/1	1 = direct debit, 0 = otherwise	Credit refers to customer paying on receipt of the bill and should include payment by cheque / cash and standing orders. Fuel direct



1	81	<u>Electricity payment method - credit</u>	0/1	1 = credit (including standing orders), 0 = otherwise	refers to payment being made to the supplier directly from a customer's benefits. Check options are mutually exclusive.
1	82	<u>Electricity payment method - pre-payment</u>	0/1	1 = pre-payment, 0 = otherwise	
1	83	<u>Electricity payment method - fuel direct</u>	0/1	1 = fuel direct, 0 = otherwise	
1	84	<u>Electricity payment method - other</u>	0/1	1 = other payment method, 0 = otherwise	
1	85	<u>Electricity payment method, please specify</u>	Free text		
2	86	<u>Electricity discount recipient</u>	0/1	1 = discount recipient, 0 = otherwise	This is to indicate whether the customer receives a discount. This should only include additional discounts which are not captured by the standing charge and unit rate.
2	87	<u>Electricity discount type - online account management / paperless billing</u>	0/1	1 = online account management / paperless billing	



					discount, 0 = otherwise	
		2	88	<b><u>Electricity discount amount for online account management / paperless billing</u></b>	£ or %	Please explain how the discount is applied to the customer bill.
		2	89	<b><u>Electricity discount type - dual fuel</u></b>	0/1	1 = dual fuel discount, 0 = otherwise
		2	90	<b><u>Electricity discount amount for dual fuel</u></b>	£ or %	Please explain how the discount is applied to the customer bill.
Gas information	Gas billing information	1	91	<b><u>Gas postal billing address line 1</u></b>	Free text	Five lines are available for the gas postal billing address. If the gas postal billing address is less than 5 lines please leave the remaining lines blank. The postcode must be supplied in the separate field and in the Royal Mail format, so for example WC1B (space) 4AD
		1	92	<b><u>Gas postal billing address line 2</u></b>	Free text	
		1	93	<b><u>Gas postal billing address line 3</u></b>	Free text	
		1	94	<b><u>Gas postal billing address line 4</u></b>	Free text	
		1	95	<b><u>Gas postal billing address line 5</u></b>	Free text	
		1	96	<b><u>Gas postcode</u></b>	Free text	



		<u>for billing address</u>				
Gas supply information	1	97	<u>Gas postal supply address line 1</u>	Free text		
	1	98	<u>Gas postal supply address line 2</u>	Free text	Five lines are available for the gas postal supply address. If the gas postal supply address is less than 5 lines please leave the remaining lines blank. The postcode must be supplied in the separate field provided and in the Royal Mail format, so for example WC1B (space) 4AD.	
	1	99	<u>Gas postal supply address line 3</u>	Free text		
	1	100	<u>Gas postal supply address line 4</u>	Free text		
	1	101	<u>Gas postal supply address line 5</u>	Free text		
	1	102	<u>Gas postcode supply address</u>	Free text		
	1	103	<u>Gas meter URN (MPRN)</u>	Free text	Customers with more than 1 gas meter will have multiple rows in the data template.	
	2	104	<u>Gas meter type - standard (single rate)</u>	0/1	1 = standard (single rate), 0 = otherwise	The smart meter indicator refers to smart meters which communicate directly with the supplier so no meter readings are required. If a customer has a smart meter but it is treated as a 'dumb' meter the smart meter indicator should be marked 0. The multi-rate indicator includes, for example, economy 7 and economy 10 meters. Check
	2	105	<u>Gas meter type - pre-payment</u>	0/1	1= pre-payment, 0 = otherwise	
2	106	<u>Gas meter type - smart</u>	0/1	1 = smart, 0 = otherwise		



		2	107	<b><u>Gas meter type - other</u></b> <b><u>If 'other' Gas meter type, please specify</u></b>	0/1  Free text	1 = other meter type, 0 = otherwise	options for standard (single rate) and multi-rate are mutually exclusive. These variables are about the meter type. If for example a customer with a multi-rate meter has chosen to be billed as if they had a standard (single rate) meter this should still be marked as a multi-rate meter.
Gas tariff information		1	109	<b><u>Gas tariff type - variable charges</u></b>	0/1	1 = standard variable charges (evergreen), 0 = otherwise	Variable tariff is defined as a tariff with a rate that can vary over time. Fixed tariff is defined as a tariff that guarantees a fixed price until a defined end date. This does not include tariffs that have an expiration date but allow the price to vary. Capped tariff is defined as a tariff that guarantees a price no higher than a pre-determined level, until a defined end date. These definitions include both the unit rate and standing charge. Check options are mutually exclusive.
		1	110	<b><u>Gas tariff type - fixed charges</u></b>	0/1	1 = fixed charges, 0 = otherwise	
		1	111	<b><u>Gas tariff type - capped charges</u></b>	0/1	1 = capped charges, 0 = otherwise	



1	112	<b><u>Gas tariff type - green</u></b>	0/1	1 = green, 0 = otherwise
1	113	<b><u>Gas tariff type - other</u></b>	0/1	1 = tariff type other, 0 = otherwise
1	114	<b><u>If 'other' gas tariff type, please specify</u></b>	Free text	
1	115	<b><u>Name of gas tariff</u></b>	Free text	
2	116	<b><u>Gas tariff unit rate</u></b>	£ per KWh	
2	117	<b><u>Gas tariff daily standing charge</u></b>	£ per day	
2	118	<b><u>Tariff Comparison Rate (TCR) - Gas</u></b>	£ per KWh	

Green tariff is defined as a tariff that comes with a promise by the supplier to either meet the customer's usage with generation from renewable energy sources, or to contribute to environmental schemes. This should include all tariffs whose primary marketed attribute is being 'green' or 'sustainable', regardless of whether the 'green' status of that tariff has been accredited by certain external institutions.

This should only be completed for tariffs which are required to have a TCR. We understand TCRs are based on average consumption figures and therefore expect the TCR to be consistent across customers on the same tariff.



		2	119	<b><u>Exit/termination fee indicator - Gas</u></b>	0/1	1 = termination fee applies, 0 = otherwise
		2	120	<b><u>Exit/termination fee amount (£) - Gas</u></b>	£	
		2	121	<b><u>Gas tariff start date</u></b>	dd/mm/yyyy	This refers to the start date of the tariff itself rather than the date at which the customer joined the tariff. If the tariff is evergreen please mark as 0.
		2	122	<b><u>Gas tariff end date</u></b>	dd/mm/yyyy	This refers to the date at which the tariff ceases to apply to the customer. If the tariff is evergreen please mark as 31/12/9999.
Gas consumption and expenditure		2	123	<b><u>Estimated annual gas consumption in October 2014 (AQ)</u></b>	KWh/year	To be completed when October 2014 AQ becomes available.
		2	124	<b><u>Projected annual gas expenditure in next 12 months based on October 2014 AQ</u></b>	£	
		2	125	<b><u>Estimated annual gas consumption in October 2013 (AQ)</u></b>	KWh/year	If AQ is unavailable please provide an alternative internal estimate.



		2	126	<b><u>Internal estimate indicator</u></b>	0/1	1 = internal estimate of gas consumption, 0 = otherwise	If the 'Estimated annual gas consumption in October 2013 (AQ)' is based on an internal estimate this should be marked 1.
		2	127	<b><u>Date of 2013 internal annual gas consumption estimate</u></b>	dd/mm/yyyy		If the 'Estimated annual gas consumption in October 2013 (AQ)' is based on an internal estimate due to the AQ being unavailable, the date of this internal estimate should be provided. If the October 2013 AQ has been provided this should be left blank. To be calculated from October 2013 AQ (or internal annual gas consumption estimate). The calculation should be: AQ (or internal annual gas consumption estimate) multiplied by unit rate, plus daily standing charge multiplied by 365 days, minus discounts. Do not make an adjustment for the contract end date; rather assume the customer is on the same tariff being charged the same unit rate and standing charge and receiving the same discount as currently for the next 12 months. For example, a customer consuming 13,000 kWh per year of gas on a tariff with a unit rate of 5p and a standing charge of 25p per day and
		2	128	<b><u>Projected annual gas expenditure in next 12 months based on estimated annual gas consumption in October 2013 (AQ)</u></b>	£		



receiving a paperless billing discount of £5 per year will have a projected gas expenditure in the next 12 months of £736.25 ( $736.25 = (13,000 * 0.05) + (0.25 * 365) - 5$ ).

			<b><u>Estimated annual gas consumption in October 2012 (AQ)</u></b>	KWh/year		
	2	129				
			<b><u>Internal estimate indicator</u></b>	0/1	1 = internal estimate of gas consumption, 0 = otherwise	
	2	130				

If AQ is unavailable please provide an alternative internal estimate for a date as close to October 2012 as possible. Please leave this blank if the customer did not receive their gas supply from you in 2012.

If the 'Estimated annual gas consumption in October 2012 (AQ)' is based on an internal estimate this should be marked 1.



		2	131	<u>Date of 2012 internal annual gas consumption estimate</u>	dd/mm/yyyy	<p>If the 'Estimated annual gas consumption in October 2012 (AQ)' is based on an internal estimate due to the AQ being unavailable, the date of this internal estimate should be provided. As detailed, we would like the estimate for a date as close to October 2012 as possible. If the October 2012 AQ has been provided this should be left blank.</p>
	Gas switching behaviour	2	132	<u>Date became gas customer</u>	dd/mm/yyyy	<p>This should refer to the most recent account opening i.e. not the first account opened if customer left and then came back. If possible, please provide the date at which the customer started receiving gas supply from you. If the date at which the customer started receiving supply is unavailable please provide the sales date. If neither is available please leave blank.</p> <p>As detailed, we would prefer the 'Date became gas customer' to correspond to the date at which the customer started receiving gas supply from you. However, if this is not available and the sales date is provided instead, this should be marked 1. If no 'Date became gas customer' is provided please leave blank.</p>
		2	133	<u>Sales date indicator</u>	0/1	<p>1 = date became gas customer based on sales date, 0 = otherwise</p>



				Centrica, RWE Npower, Scottish Power, SSE, E-ON, EDF, Co- operative Energy, First Utility, Ovo Energy, Utility Warehouse, Other, DK	
		2	134	<b><u>Name of previous gas supply company If 'other' previous gas supply company, please specify</u></b>	
		2	135	Free text	Please use the supplier names as listed.
		2	136	<b><u>Date joined current gas tariff</u></b>	This refers to the date at which the tariff started to apply to the customer rather than the sales date. This should be completed for all customers even if the date of becoming a gas customer and the date of joining the current tariff are exactly the same.
				dd/mm/yyyy	



			<b><u>Date of most recent gas tariff switch within supplier</u></b>	dd/mm/yyyy	<p>This refers to the date at which the tariff started to apply rather than the sales date. This should only include proactive switches i.e. exclude those where customers were automatically moved onto a new tariff due to the end of an existing one. For example, if a customer is moved onto a new tariff because their fixed tariff comes to its end date this would not be considered a proactive switch. If information on proactive switches is unavailable and cannot be derived from other information please provide the date of the most recent switch recorded.</p> <p>This should only include proactive switches i.e. exclude those where customers were automatically moved onto a new tariff due to the end of an existing one. For example, if a customer is moved onto a new tariff because their fixed tariff comes to its end date this would not be considered a proactive switch. If information on proactive switches is unavailable and cannot be derived from other information please provide information on the total number of switches.</p>
		2	137		
			<b><u>Number of gas tariff switches within supplier between 1st July 2011 and 31st July 2014 (inclusive)</u></b>	Free text	
		2	138		



				<p><b><u>Number of gas tariff switches within supplier since 2009 (or company start date if after 2009)</u></b></p>	Free text	<p>This should only include proactive switches i.e. exclude those where customers were automatically moved onto a new tariff due to the end of an existing one. For example, if a customer is moved onto a new tariff because their fixed tariff comes to its end date this would not be considered a proactive switch. If information on proactive switches is unavailable and cannot be derived from other information please provide information on the total number of switches.</p> <p>As detailed, we would prefer the 'Number of gas tariff switches within supplier between 1st July 2011 and 31st July 2014 (inclusive)' and 'Number of gas tariff switches within supplier since 2009 (or company start date if after 2009)' variables to only include proactive switches. If it is number of proactive switches only that has been provided please mark as 1. If the number of all switches has been provided please mark as 0.</p>
		2	139			
		2	140	<p><b><u>Proactive switch indicator</u></b></p>	0/1	<p>1 = proactive switch(es), 0 = otherwise</p>
Gas payment information		1	141	<p><b><u>Gas Payment method - direct debit</u></b></p>	0/1	<p>1 = direct debit (including standing orders), 0 =</p> <p>Credit refers to customer paying on receipt of the bill and should include payment by cheque / cash and standing orders. Fuel direct refers to payment being made to</p>



				otherwise	the supplier directly from a customer's benefits. Check options are mutually exclusive.
1	142	<u>Gas Payment method - credit</u>	0/1	1 = credit, 0 = otherwise	
1	143	<u>Gas Payment method - pre-payment</u>	0/1	1 = pre-payment, 0 = otherwise	
1	144	<u>Gas Payment method - fuel direct</u>	0/1	1 = fuel direct, 0 = otherwise	
1	145	<u>Gas Payment method - other</u>	0/1	1 = other payment method, 0 = otherwise	
1	146	<u>If 'other' gas payment method, please specify</u>	Free text		
2	147	<u>Gas discount recipient</u>	0/1	1 = discount recipient, 0 = otherwise	This is to indicate whether the customer receives a discount. This should only include additional discounts which are not captured by the standing charge and unit rate.
2	148	<u>Gas discount type - online account management / paperless billing</u>	0/1	1 = online account management / paperless billing discount, 0 = otherwise	



			<b><u>Gas discount amount for online account management / paperless billing</u></b>	£ or %		Please explain how the discount is applied to the customer bill.
		2	149			
			<b><u>Gas discount type - dual fuel</u></b>	0/1	1 = dual fuel discount, 0 = otherwise	
		2	150			
			<b><u>Gas discount amount for dual fuel</u></b>	£ or %		Please explain how the discount is applied to the customer bill.
		2	151			

## APPENDIX B – FINAL QUESTIONNAIRE

### ENERGY MARKET INVESTIGATION

#### Survey QUESTIONNAIRE

FINAL: 21 October 2014

#### **A Introduction and screener**

Good afternoon/evening. Please could I speak to {NAMED CONTACT?}

IF SOMEONE ELSE ANSWERS AND ASKS WHY WE WANT TO TALK TO NAMED CONTACT, SAY:

I am calling because {NAMED CONTACT} has been sent a letter or email by the Competition and Market Authority inviting them to take part in an important survey

My name is ..... from GfK NOP, an independent market research company. We are carrying out an important survey on behalf of the Competition and Markets Authority about people's experience with their gas and electricity suppliers, and about what they want from their supplier.

You should have received an email or letter regarding this research - can I just check that you received this?

Yes  
No  
Not sure

IF NO/NOT SURE READ OUT:

The Competition and Markets Authority, an independent public body, is currently investigating the energy market in Great Britain. Your name has been selected at random from a list of gas and electricity customers. Your survey responses will be treated in the strictest confidence.

#### **ASK ALL**

Your feedback would be very useful to the investigation. Would you be kind enough to spare some time to take part in the interview now?

IF ASKED HOW LONG IT WILL TAKE ““The survey will take about 20 minutes to complete.” We do offer a facility where you can start the survey now and if you need to go at any point we can stop and call you back another time to continue. Can we make a start now?

## ADD REASSURANCES AS NECESSARY

- Everything you say is confidential and will be protected at every stage, as required by the law.
  - This is not a sales call (there will be no attempt to sell you anything, either during or as a result of the survey).
  - The Competition and Markets Authority was formed from the merger of the Office of Fair Trading and the Competition Commission in April 2014
  - Your contact details were provided to us by one of the energy companies involved in this Investigation as the Competition and Markets Authority has requested this information. The Competition and Markets Authority has exercised its statutory powers to require your supplier to share your data with us, INTERVIEWER NOTE – IF NEEDED, THIS POINT MUST BE READ EXACTLY AS WORDED
1. The interview will be recorded but this is for our own quality assurance purpose and will not be kept

## RECORDING

This call may be recorded for training and quality purposes and will be in accordance with our industry Codes of Practice and Guidelines.

1. Continue
2. Respondent objects to being recorded

## IF OBJECTS TO RECORDING

In that case I can assure you the recording will be completely deleted following this call.

A 1 Are you mainly or jointly responsible in your household for making decisions on gas and/or electricity supply and usage? EXPLAIN ONLY  
ASKING ABOUT MAINS GAS AND MAINS ELECTRICITY

INTERVIEWER: IF RENT A PROPERTY WHERE THE LANDLORD ORGANISES AND PAYS THE ENERGY BILLS, CODE AS NO

1. Yes – main
2. Yes - joint
3. No
4. DK

## IF A1 '1 OR 2' GO TO A4 ELSE ASK A2

A 2 Could I speak to the person who is responsible, or jointly responsible, for these decisions? Interviewer record – Does responsible person live in same household or different one?

1. Same
2. Different

IF SAME HOUSEHOLD RECORD NAME AND IF APPROPRIATE TELEPHONE NUMBER AND RESTART INTERVIEW AT A1. IF DIFFERENT HOUSEHOLD CLOSE

A 3 DELETED

**ASK ALL**

A 4 Is this property your primary residence – that is where you live most of the time - or not? EXCLUDE HOLIDAY HOMES/ PROPERTIES RENTED OUT

1. Yes
2. No
3. DK

**CONTINUE IF PRIMARY RESIDENCE (CODE 1). REST CLOSE.**

A 5 How long have you been living at {textfill address}?

- |    |    |                                   |
|----|----|-----------------------------------|
|    | 1  | Under 6 months                    |
| 2  |    | 6 months but less than 1 year     |
|    | 3  | 1 but less than 2 years           |
|    | 4  | 2 but less than 3 years           |
|    | 5  | 3 but less than 4 years           |
|    | 6  | 4 but less than 5 years           |
|    | 7  | 5 but less than 10 years          |
| 8  |    | 10 but less than 20 years         |
|    | 9  | 20 years or more                  |
|    | 10 | Don't know                        |
| 11 |    | No longer at this address (CLOSE) |

A 6 In your home do you have ...READ OUT SINGLE CODE ONLY.

1. Mains gas only
2. Mains electricity only
3. Mains gas and electricity
4. Or neither of these
5. Don't Know

**IF A6'1' GO TO B5. IF A6'2' GO TO B9. IF A6'3' ASK A7. ELSE THANK AND CLOSE.**  
**ASK ALL WITH MAINS GAS AND MAINS ELECTRICITY**

A 7 Do you have separate companies supplying your gas and electricity, or do you have one company supplying both?

- 1 Separate companies
- 2 One company for both
- 3 Don't know

**IF DON'T KNOW PROMPT** According to the supplier records you have {textfill company type}. Does that sound right? RE- CODE AS NECESSARY, ONLY LEAVE AS DON'T KNOW IF RESPONDENT DISAGREES WITH SAMPLE INFORMATION BUT DOESN'T KNOW IF ONE COMPANY OR NOT

**B ENERGY SUPPLIER/TARIFF USED**

**IF A7 '2' ASK B1 ELSE GO TO FILTER BEFORE B6**

**ASK ALL WITH ONLY ONE SUPPLIER FOR BOTH FUELS**

**B 1** Who is your current supplier of your mains gas and electricity? DO NOT READ OUT. SINGLE CODE ONLY

1. British Gas (Centrica)
2. Co-operative Energy (Midcounties Co-operative Ltd)
3. E.ON
4. Ebico (Equipower/Equigas)
5. Ecotricity
6. Extra Energy
7. EDF Energy
8. First Utility
9. Good Energy
10. Marks and Spencer Energy
11. Npower/ RWE Npower
12. Ovo Energy (Woodland Trust)
13. Sainsbury's Energy
14. Scottish Gas
15. Scottish Power
16. Spark Energy
17. SSE Atlantic
18. SSE Scottish Hydro
19. SSE (Scottish and Southern Energy)
20. SSE Southern Electric
21. SSE Swalec
22. Utilita
23. Utility Warehouse
24. Other (Write in)
25. Don't know

**IF SUPPLIER TYPE FROM SAMPLE = DUAL AND SUPPLIER AT B1 DOES NOT MATCH SUPPLIER FROM SAMPLE ASK B2 ELSE GO TO B13**

**B 2** According to the supplier records, your supplier is {textfill supplier from sample}. Could this be correct?

1. Yes
2. No

**IF B2'2' ASK B3 ELSE GO TO B13**

B 3 Have you recently switched from that supplier?

- 1 Yes
- 2 No

B 4 DELETED

IF A6 '1' OR A7 '1' ASK B5 ELSE GO TO FILTER BEFORE B9

ALL WITH MAINS GAS ONLY OR TWO SUPPLIERS

B 5 Who is your current mains gas supplier? DO NOT READ OUT. SINGLE CODE ONLY

1. British Gas (Centrica)
2. Co-operative Energy (Midcounties Co-operative Ltd)
3. E.ON
4. Ebico (Equipower/Equigas)
5. Ecotricity
6. Extra Energy
7. EDF Energy
8. First Utility
9. Good Energy
10. Marks and Spencer Energy
11. Npower/ RWE Npower
12. Ovo Energy (Woodland Trust)
13. Sainsbury's Energy
14. Scottish Gas
15. Scottish Power
16. Spark Energy
17. SSE Atlantic
18. SSE Scottish Hydro
19. SSE (Scottish and Southern Energy)
20. SSE Southern Electric
21. SSE Swalec
22. Utilita
23. Utility Warehouse
24. Other (Write in)
25. Don't know

IF SUPPLIER TYPE FROM SAMPLE = GAS AND SUPPLIER AT B5 DOES NOT MATCH SUPPLIER FROM SAMPLE ASK B6 ELSE GO TO B8

B 6 According to the supplier records, your mains gas supplier is {textfill supplier from sample}. Could this be correct?

- 1. Yes
- 2. No

IF B6'2' ASK B7 ELSE GO TO B13

B 7 Have you recently switched from that supplier?

- 1 Yes  
2 No

B 8 DELETED

IF A6 '2' OR A7 '1' ASK B9 ELSE GO TO B13  
ASK ALL WITH ELECTRICITY ONLY OR TWO SUPPLIERS

B 9 Who is your current electricity supplier? DO NOT READ OUT. SINGLE  
CODE ONLY

2.

1. British Gas (Centrica)
2. Co-operative Energy (Midcounties Co-operative Ltd)
3. E.ON
4. Ebico (Equipower/Equigas)
5. Ecotricity
6. Extra Energy
7. EDF Energy
8. First Utility
9. Good Energy
10. Marks and Spencer Energy
11. Npower/ RWE Npower
12. Ovo Energy (Woodland Trust)
13. Sainsbury's Energy
14. Scottish Gas
15. Scottish Power
16. Spark Energy
17. SSE Atlantic
18. SSE Scottish Hydro
19. SSE (Scottish and Southern Energy)
20. SSE Southern Electric
21. SSE Swalec
22. Utilita
23. Utility Warehouse
24. Other (Write in)
25. Don't know

**IF SUPPLIER TYPE FROM SAMPLE = ELECTRICITY AND SUPPLIER AT B9 DOES NOT MATCH SUPPLIER FROM SAMPLE ASK B10 ELSE GO B13**

B 10 According to the supplier records, your electricity supplier is {textfill supplier from sample}. Could this be correct?

1. Yes
2. No

IF B10'2' ASK B11 ELSE GO TO B13

B 11 Have you recently switched from that supplier?

- 1 Yes
- 2 No

B 12 DELETED

### ASK ALL

Now thinking about what you pay for energy. A tariff is your price plan for energy and determines how much you get charged for the amount of energy you use. It typically includes a standing daily rate and a unit rate.

B 13 A fixed rate tariff is one that has a guaranteed fixed rate, for a set period. Are you on a fixed rate tariff for your energy? DO NOT READ OUT. PROBE TO PRECODE. SINGLE CODE ONLY.

INTERVIEWER NOTE IF RESPONDENT SAYS TARIFF IS CAPPED THAT SHOULD BE CODED AS VARIABLE.

**INTERVIEWER NOTE: IT IS THE TARIFF, NOT THE DIRECT DEBIT /PAYMENT AMOUNT WHICH IS FIXED**

INTERVIEWER NOTE: FOR A FIXED TARIFF THE DAILY STANDING CHARGE AND THE UNIT RATE STAY THE SAME FOR A FIXED TIME PERIOD, EG 1-2 YEARS

1. Yes, gas only
2. Yes, electricity only
3. Yes, gas and electricity
4. No
5. Don't know

B 14 Thinking about all possible suppliers and tariff options, how confident are you now that you are on the right energy deal for you? Would you say ....  
READ OUT

1. Very confident
2. Fairly confident
3. Not very confident
4. Not at all confident
5. Don't know (DO NOT READ OUT)

**C SATISFACTION WITH ENERGY SUPPLIER**

I am now going to ask you about your overall view of your current energy supplier

**IF A7 '2' ASK C1 ELSE GO TO FILTER BEFORE C4**

**ASK ALL WITH ONE SUPPLIER FOR BOTH FUELS**

C 1 How satisfied are you with your current mains gas and electricity supplier?  
Would you say ... READ OUT

1. Very satisfied
2. Fairly satisfied
3. Neither satisfied nor dissatisfied
4. Fairly dissatisfied
5. Very dissatisfied
6. Don't know [DO NOT READ OUT]

C 2 If someone you know was considering changing their mains gas and electricity supplier and asked you, would you recommend yours or recommend against using yours? DO NOT READ OUT. PROBE AS NECESSARY Is that strongly recommend or just recommend?

1. Strongly recommend in favour
2. Recommend in favour
3. Not recommend either way
4. Recommend against
5. Strongly recommend against
6. Don't know

IF C1 '4 OR 5' ASK C3 ELSE GO TO D1

ASK ALL DISSATISFIED WITH DUAL FUEL SUPPLIER

C 3 Why are you dissatisfied with your current energy supplier? DO NOT READ OUT BUT PROBE TO PRECODES. PROMPT: Why else? PROMPT UNTIL NO. MULTI-CODING ALLOWED

**Cost / tariff**

1. Existing tariff expensive
2. Didn't save as much as I thought I would
3. Problems with direct debit / payment e.g. set too high
4. DELETED
5. Received very high bill
6. Price increase announcement
7. Annual summary / other communication from existing supplier

**Quality / reliability - existing**

8. Poor service from existing supplier
9. Don't / didn't get accurate/useful/informative/clear bills on time
10. Prepayment meter problems e.g. settings, faults, use

**3. Searching for alternative**

11. DELETED

12. DELETED

**Switching to alternative**

13. DELETE

14. Transfer problems - switching to supplier

**General**

15. Nothing specific

16. Other (specify)

17. Don't know

NOW GO TO D1

IF A6 '1' OR A7 '1' ASK C4 ELSE GO TO FILTER BEFORE C7

ASK ALL WITH MAINS GAS AND NOT SINGLE SUPPLIER FOR BOTH FUELS

C 4 How satisfied are you with your mains gas supplier? Would you say ...  
READ OUT

1. Very satisfied
2. Fairly satisfied
3. Neither satisfied nor dissatisfied
4. Fairly dissatisfied
5. Very dissatisfied
6. Don't know [DO NOT READ OUT]

C 5 If someone you know was considering changing their mains gas supplier and asked you, would you recommend yours or recommend against using yours? DO NOT READ OUT PROBE AS NECESSARY Is that strongly recommend or just recommend?

1. Strongly recommend in favour
2. Recommend in favour
3. Not recommend either way
4. Recommend against
5. Strongly recommend against
6. Don't know

IF C4 '4 OR 5' ASK C6 ELSE GO TO FILTER BEFORE C7

ASK ALL DISSATISFIED WITH GAS SUPPLIER

C 6 Why are you dissatisfied with your current mains gas supplier? DO NOT READ OUT BUT PROBE TO PRECODES. PROMPT: Why else? PROMPT UNTIL NO. MULTI-CODING ALLOWED

**Cost / tariff**

1. Existing tariff expensive
2. Didn't save as much as I thought I would
3. Problems with direct debit / payment e.g. set too high
4. DELETED
5. Received very high bill
6. Price increase announcement
7. Annual summary / other communication from existing supplier

**Quality / reliability - existing**

8. Poor service from existing supplier
9. Don't / didn't get accurate/useful/informative/clear bills
10. Prepayment meter problems e.g. settings, faults, use

4. **Searching for alternative**

11. DELETED
12. DELETED

**Switching to alternative**

13. DELETED
14. Transfer problems - switching to supplier

**General**

15. Nothing specific
16. Other (specify)
17. Don't know

IF A6 '2' OR A7 '1' ASK C7 ELSE GO TO C10

ASK ALL WITH MAINS ELECTRICITY AND NOT SINGLE SUPPLIER FOR BOTH FUELS

C 7 How satisfied are you with your current electricity supplier? Would you say ... READ OUT

1. Very satisfied
2. Fairly satisfied
3. Neither satisfied nor dissatisfied
4. Fairly dissatisfied
5. Very dissatisfied
6. Don't know [DO NOT READ OUT]

C 8 If someone you know was considering changing their electricity supplier and asked you, would you recommend yours or recommend against using yours? DO NOT READ OUT. PROBE AS NECESSARY Is that strongly recommend or just recommend?

1. Strongly recommend in favour
2. Recommend in favour
3. Not recommend either way
4. Recommend against
5. Strongly recommend against
6. Don't know

IF C7'4 OR 5' ASK C9 ELSE GO TO C10

ASK ALL DISSATISFIED WITH ELECTRICITY SUPPLIER

C 9 Why are you dissatisfied with your current electricity supplier? DO NOT READ OUT BUT PROBE TO PRECODES. PROMPT: Why else? PROMPT UNTIL NO. MULTI-CODING ALLOWED

**Cost / tariff**

1. Existing tariff expensive
2. Didn't save as much as I thought I would
3. Problems with direct debit / payment e.g. set too high
4. DELETED
5. Received very high bill
6. Price increase announcement
7. Annual summary / other communication from existing supplier

**Quality / reliability - existing**

8. Poor service from existing supplier
9. Don't / didn't get accurate/useful/informative/clear bills
10. Prepayment meter problems e.g. settings, faults, use

5. **DELETED -Searching for alternative**

11. DELETED
12. DELETED

**Switching to alternative**

13. DELETED
14. Transfer problems - switching to supplier

**General**

15. Nothing specific
16. Other (specify)
17. Don't know

## D CHOICE DRIVERS

I am now going to ask you a few questions about choosing an energy supplier.

- D 1 When choosing a supplier for mains gas or electricity people take all sorts of things into account. What would be most important to you? DO NOT READ OUT. PROMPT What else? PROMPT UNTIL NO. [CODE FIRST MENTION THEN ALL OTHER MENTIONS]

### Cost / tariff

1. Cost/tariff/price/rate
2. Payment options (online, payment schemes, flexibility, direct debit)
3. Ability to fix the price/rate (length of fix)
4. Exit fees
5. Simple/easy to understand tariffs
6. Wanted dual fuel/same supplier for gas and electricity
- 6.

### Quality / reliability

7. Good quality service (including customer service, reliable supply etc)
8. Get accurate/useful/informative/clear bills on time

### Existing supplier characteristics

9. Good reputation
10. Green credentials
11. Ethical credentials
12. Supplier is one of large established brand
13. Supplier is not one of large established brand

### Additional features / services of existing

14. Customer loyalty scheme (e.g. perks, reward points, vouchers, cashback)
15. Range of other products e.g. Boiler maintenance/home save service/emergency repair

### General

16. Past experience in using supplier
17. Recommendation from family, friends or colleagues
18. Provides information/services suitable for those with health problems/disability
19. Other (specify)
20. Don't know



D 2 I am going to read out a number of reasons why people choose an energy supplier. For each of these I'd like you to tell me how important it is to you personally, using the following scale. READ OUT SCALE

- Essential
- Very important
- Fairly important
- Not important
- Don't know (DO NOT READ OUT)

So first of all .... READ OUT FEATURE. RANDOMISE ORDER. READ OUT SCALE FOR FIRST THREE FEATURES.

7.
  - a. Cheap tariff rate
  - b. Simple / easy to understand tariffs
  - c. Tariffs tailored to your energy usage or circumstance
  - d. Range of other services available such as boiler maintenance.
  - e. Supplier provides smart meters
  - f. Payments based on actual not estimated usage
  - g. Good customer service
  - h. Large supplier / established brand

**E ENERGY SWITCHING AWARENESS/BEHAVIOUR****SWITCH WITHIN SAME SUPPLIER****ASK ALL**

E 1 Which if any of the following do you think it is now possible for energy customers in general to do, subject to any exit fees that may be charged. If you don't know please say so. READ OUT FIRST STATEMENT: Do you think it is now possible or not possible for customers to .....? RANDOMISE ORDER OF STATEMENTS AND RECORD ORDER OF ASKING AS PART OF DATA

INTERVIEWER NOTE – IF RESPONDENT SAYS SOME PEOPLE CAN BUT THEY CAN'T CODE THIS AS POSSIBLE

IF RESPONDENT ANSWERS IN REFERENCE TO THEMSELVES PROMPT FOR ANSWER RELATING TO CUSTOMERS IN GENERAL.

- A Change tariff with their current supplier
- B Change payment method
- C Switch to a different supplier

**SCALE**

1. Possible
2. Not possible
3. Don't know

IF NOT POSSIBLE (I.E. CODE 2) TO ALL THREE ITEMS AT E1 GO TO SECTION G

E 2 The next question is about things you and your household have ever done in connection with your energy supply. Have you ever .....? READ OUT EACH IN TURN AND CODE YES/NO/DK

A Been approached by your existing energy supplier suggesting you change to a different tariff (ONLY ASK IF THOUGHT POSSIBLE OR DON'T KNOW AT E1A)

B Made an active decision to change to a different tariff with your existing energy supplier (ONLY ASK IF THOUGHT POSSIBLE OR DON'T KNOW AT E1A)

INTERVIEWER NOTE THIS DOES NOT COUNT JUST BEING MOVED TO A NEW TARIFF WHEN A FIXED TARIFF RUNS OUT

C Been contacted by a different supplier from your current one, suggesting you switched to them (ONLY ASK IF THOUGHT POSSIBLE OR DON'T KNOW AT E1C)

D Shopped around to see what other energy suppliers have to offer (ONLY ASK IF THOUGHT POSSIBLE OR DON'T KNOW AT E1C)

E Switched to a different energy supplier (ONLY ASK IF THOUGHT POSSIBLE OR DON'T KNOW AT E1C)

1. Yes
2. No
3. Don't know

**IF E2B'2' ASK E3 ELSE GO TO FILTER BEFORE E7**

**ASK ALL WHO HAVE NEVER SWITCHED TARIFF WITHIN SAME SUPPLIER**

E 3 Have you ever considered changing your energy tariff while staying with the same supplier?

1. Yes
2. No
3. Don't know

**IF E3 '2' ASK E4. IF E3'1' GO TO E5. ELSE GO TO FILTER BEFORE E7  
ASK ALL WHO HAVE NEVER CONSIDERED SWITCHING TARIFF WITHIN  
SAME SUPPLIER**

E 4 Why have you never considered changing tariff? DO NOT READ OUT BUT PROBE TO PRECODES. PROMPT: Why else? PROMPT UNTIL NO

IF RESPONDENT SAYS "Happy with/like existing supplier THEN  
PROMPT: "What do you like about your existing supplier

8. **Cost / tariff**

1. Existing tariff is satisfactory
2. Didn't think I'd save enough
3. Confident I'm on the best deal for me
4. Payment / direct debit all set up

9. **Searching for alternative**

5. Too much effort / can't be bothered
6. Takes too long/would take too long/don't have time
7. Don't know how to do it
8. Difficult to find information (include information about own tariffs/bills/usage/other suppliers)
9. Don't understand/difficult to compare tariffs

10. **Switching to alternative**

10. In debt to supplier
11. Unable to - landlord won't allow

11. **General**

12. Not interested
13. Too complicated
14. Didn't know you could
15. Not been with existing supplier long
16. All suppliers are much the same/no difference
17. Nothing specific
18. Other (specify)
19. Don't know

**NOW GO TO FILTER BEFORE E7**

**IF E3 '1' ASK E5**

**ASK ALL WHO CONSIDERED CHANGING TARIFF WITH SAME SUPPLIER**

E 5 When you last considered changing tariff, did you then go and investigate the different tariffs available from your own energy supplier, or not?

1. Yes
2. No
3. Don't know

**IF E5 '2' ASK E6 ELSE GO TO FILTER BEFORE E7**

**ASK ALL WHO DID NOT INVESTIGATE TARIFFS WITH SAME SUPPLIER**

E 6 Why did you not do this? DO NOT READ OUT BUT PROBE TO PRECODES. PROMPT: Why else? PROMPT UNTIL NO

USE SAME ANSWER CODES AS E4

**SWITCHING SUPPLIER  
SUPPLIER APPROACHES**

**IF E2C'1' ASK E7 ELSE GO TO FILTER BEFORE E12**

**ASK ALL WHO HAVE BEEN CONTACTED BY ANOTHER SUPPLIER**

E 7 You said you had been contacted by an energy company suggesting you switch supplier. When was the last time this happened?

1. Within last 3 months
2. Within last 6 months
3. Within last 9 months
4. Within last year
5. Within last 2 years
6. Within last 3 years
7. More than three years ago
8. Don't know

E 8 How did they contact you? DO NOT READ OUT. MULTICODING ALLOWED

1. Sales rep came to my door
2. Telephoned me
3. Emailed me
4. Direct mail or leaflet through the post
5. Public place eg shopping centre
6. Other (Write in)
7. Don't know

E 9 Did they offer you a deal that looked better than from your existing supplier or was their deal no better?

1. Yes – looked better
2. No – it didn't look better
3. Don't know

E 10 Did you switch to that energy supplier after they contacted you, or not?

1. YES TO THAT SUPPLIER

2. NO
3. DON'T KNOW

if E10 '2' ask e11 else go to filter before e12  
 ASK ALL WHO DID NOT SWITCH

E 11 Why did you not switch to the supplier that approached you? DO NOT READ OUT BUT PROBE TO PRECODES. PROMPT: Why else? PROMPT UNTIL NO INTERVIEWER: IF RESPONDENT SAYS "HAPPY WITH/LIKE CURRENT SUPPLIER" THEN PROMPT: What do you like about your existing supplier?

**Cost / tariff**

1. Existing tariff is satisfactory
2. Didn't think I'd save enough
3. Concerned about exit fees/on fixed tariff
4. Payment / direct debit all set up
5. Didn't know if there were better options
6. Didn't think the gain would be achieved
7. Found cheaper tariff with current supplier

**Quality / reliability – existing**

8. Good quality service from existing supplier (including customer service, reliable supply etc)
9. Get accurate/useful/informative/clear bills on time

**Existing supplier characteristics**

10. Good reputation - existing supplier
11. Green credentials - existing supplier
12. Ethical credentials - existing supplier

**Other supplier**

13. Don't like/trust other supplier
14. Didn't like sales pitch/cold calling

**Additional features / services of existing**

15. Customer loyalty scheme (e.g. perks, reward points, vouchers, cashback)
16. Range of other products e.g. Boiler maintenance/home care service/emergency repair

**Searching for alternative**

17. Prefer to search myself
18. Difficult to compare suppliers

### Switching to alternative

- 19. Too much effort / can't be bothered
- 20. Takes too long/Would take too long/don't have time
- 21. Things might go wrong / worried about moving

### General

- 22. Don't know how to do it
- 23. Not interested
- 24. Too complicated
- 25. All suppliers are much the same / no difference
- 26. Haven't had time to make switch
- 27. Nothing specific
- 28. Other (specify)
- 29. Don't know

## CONSIDERING SWITCHING

**IF A7'1' (SEPARATE COMPANIES) ASK E12, ELSE GO TO FILTER BEFORE E13**

E 12 You said that you have different suppliers for your mains gas and your electricity. The rest of the interview would take too long if I asked you about each one separately. So for the rest of the questionnaire I would like you to answer only about [text fill fuel type] from [text fill supplier from sample], and not about {textfill not fuel type}. Is that clear? CLARIFY IF NO

**IF E2 D'2 OR 3' AND E2 E '2 OR 3' ASK E13 ELSE GO TO FILTER BEFORE E16**

**ASK ALL THOSE WHO THINK IT IS POSSIBLE TO SWITCH EXCEPT THOSE WHO HAVE SHOPPED AROUND OR SWITCHED**

E 13 (Apart from when an energy company contacted you IF E2C'1'), have you ever considered switching to another energy supplier (for your {textfill fuel type})?

- 1. Yes
- 2. No
- 3. Don't know

IF E13 '1' GO TO FILTER BEFORE E15. IF E13 '2' ASK E14. ELSE GO TO FILTER BEFORE E16

ASK ALL WHO THINK IT POSSIBLE BUT HAVE NEVER CONSIDERED SWITCHING

E 14 Why have you never considered switching supplier (for your {textfill fuel type})? PROMPT: Why else? PROMPT UNTIL NO. : IF RESPONDENT SAYS "happy with/like current supplier" THEN PROMPT: What do you like about your existing supplier?

**Cost / tariff**

1. Existing tariff is satisfactory
2. Didn't think I'd save enough
3. Concerned about exit fees/on fixed tariff
4. Payment / direct debit all set up

**Quality / reliability - existing**

5. Good quality service from existing supplier (including customer service, reliable supply etc)
6. Get accurate/useful/informative/clear bills on time

**Existing supplier characteristics**

7. Good reputation - existing supplier
8. Green credentials - existing supplier
9. Ethical credentials - existing supplier

**Other supplier**

10. Don't like other suppliers / no-one I'd want to switch to

**Additional features / services of existing**

11. Customer loyalty scheme (e.g. perks, reward points, vouchers, cashback)
12. Range of other products e.g. Boiler maintenance/home care service/emergency repair

**Searching for alternative**

13. Too much effort / can't be bothered
14. Takes too long/would take too long/ don't have time
15. Difficult to find information(include information about own tariffs/bills/usage/other suppliers)
16. Difficult to compare suppliers

**Switching to alternative**

17. Too much effort / can't be bothered
18. Takes too long/would take too long/ don't have time
19. Things might go wrong / worried about moving

**General**

20. Don't know how to do it

- 21. Not interested
- 22. Too complicated
- 23. All suppliers are much the same / no difference
- 24. Nothing specific
- 25. Other (specify)
- 26. Don't know

**NOW GO TO F1**

**SHOPPING AROUND**

IF E2d '2 OR3' and E13 '1' ASK E15. ELSE GO TO E16

**ALL WHO CONSIDERED SWITCHING BUT NEVER SHOPPED AROUND OR SWITCHED**

- E 15 You say you have considered switching to a different energy supplier, but have never shopped around to see what other suppliers had to offer? What if anything has stopped you from shopping around? IF RESPONDENT SAYS "Happy with/like existing supplier THEN PROMPT: "What do you like about your existing supplier

DO NOT READ OUT PROMPT: WHAT ELSE? PROMPT UNTIL NO.

MULTICODING ALLOWED PROBE IF JUST SAY TARIFF TOO COMPLEX

**Cost / tariff**

- 1. Existing tariff is satisfactory
- 2. Didn't think I'd save enough
- 3. Confident I'm on the best deal for me
- 4. Payment / direct debit all set up

**Quality / reliability – existing**

- 5. Good service from existing supplier (including customer service, reliable supply etc)
- 6. Get accurate/useful/informative/clear bills on time

**Existing supplier characteristics**

- 7. Good reputation - existing
- 8. Green credentials - existing
- 9. Ethical credentials – existing

**Additional features / services of existing**

- 10. Customer loyalty scheme (e.g. perks, reward points, vouchers, cashback)
- 11. Range of other products e.g. Boiler maintenance/home care service/emergency repair

### Searching for alternative

- 12. Too much effort / can't be bothered
- 13. Takes too long / would take too long/don't have time
- 14. Don't know how to do it
- 15. Difficult to find information (include information about own tariffs/bills/usage/other suppliers)
- 16. Don't understand enough /Difficult to compare tariffs

### Switching to alternative

- 17. In debt to supplier
- 18. Unable to - landlord won't allow

### General

- 19. Not interested
- 20. Too complicated
- 21. Didn't know you could
- 22. All suppliers are much the same/no difference
- 23. Nothing specific
- 24. Other (specify)
- 25. Don't know

**NOW GO TO FILTER BEFORE E30**

**IF E2D'1' ASK E16 ELSE GO TO FILTER BEFORE E30**

**ASK ALL WHO EVER SHOPPED AROUND**

E 16 How many times have you shopped around to compare the pros and cons of different energy suppliers (for your {textfill fuel type}) in the last three years?

- 1. Once
- 2. Twice
- 3. 3 times
- 4. 4 times
- 5. 5 times
- 6. More than 5 times
- 7. Haven't shopped around in last three years
- 8. Don't know

E 17 When was the last time that you shopped around (for your {textfill fuel type})?

1. Within last 3 months
2. Within last 6 months
3. Within last 9 months
4. Within last year
5. Within last 2 years
6. Within last 3 years
7. More than three years ago
8. Don't know

**IF E17'7' GO TO FILTER BEFORE E30 ELSE ASK E18**  
**ASK ALL WHO SHOPPED AROUND IN LAST 3 YEARS**

E 18 Thinking just about the last time you shopped around (for your {textfill fuel type}), was there anything specifically that prompted you to do so? DO NOT READ OUT BUT PROBE TO PRECODES. PROMPT: What else? PROMPT UNTIL NO

**Cost / tariff**

1. Existing tariff expensive
2. Amount I expected to save/looking to save money
3. Problems with direct debit / payment e.g. set too high
4. Wanted to fix the rate
5. Wanted dual fuel/same supplier for gas and electricity
- 12.
6. Received very high bill
7. Price increase announcement
8. Annual summary / other communication from existing supplier

**Quality / reliability - existing**

9. Wanted better customer service/poor service from existing supplier
10. Don't / didn't get accurate/useful/informative/clear bills / on time

**Supplier characteristics**

11. Heard good things about other supplier/s
12. Other supplier seemed greener
13. Other supplier seemed more ethical
14. Other supplier seemed better (general)

**Additional features / services of existing**

15. Wanted customer loyalty scheme (e.g. perks, reward points, vouchers, cashback)
16. Wanted other services e.g. boiler maintenance/home service/emergency

repair

17. Wanted smart meter / way of monitoring usage

### Searching for alternative

18. Contract with existing supplier was due to end

19. Moved home

20. Advertising / promotion / offers from other supplier/s

21. An alternative supplier contacted me directly

22. Recommendation from family / friends / colleagues

23. Nothing specific/just curious

24. Other (specify)

25. Don't know

13.

E 19 How did you find out information about different suppliers? PROMPT: What else? PROMPT UNTIL NO. DO NOT READ OUT BUT PROBE TO PRECODES.

INTERVIEWER NOTE: IF RESONDNET JUST SAYS INTERNET PROBE FOR WHERE ON INTERNET

1. Through price comparison website (eg Uswitch, compare the market)
2. Independent advice services and consumer magazines/publications (e.g. Which, Citizens Advice, Money Advice, Money saving expert, Martin Lewis etc.)
3. Visited supplier websites
4. Telephoned suppliers
5. Looked at supplier advertisements
6. At a public forum e.g. shopping centre stand
7. Family and friends
8. Other – specific supplier mentions (WRITE IN)
9. Other (WRITE IN)
10. Don't know

E 20 There are six major suppliers in the market– that is British Gas, E.ON, EDF, Npower, Scottish Power and SSE – and many other smaller suppliers. Did you look only at major suppliers, or only at smaller suppliers, or did you look at both?

1. Only 6 major suppliers
2. Only smaller suppliers
3. Both
4. Don't know

**IF E20'1' ASK E21 ELSE GO TO E22**

**ASK THOSE WHO ONLY LOOKED AT 6 MAJOR SUPPLIERS**

E 21 Why did you not look at any of the smaller suppliers? DO NOT READ OUT BUT PROBE TO PRECODES. CODE ALL THAT APPLY

1. Not aware of smaller suppliers
2. Didn't trust reliability of energy supply
3. Uncertainty/Risk about customer service
  4. Poor reputation
  5. Want a household name
  6. Too new
  7. Bad experience
8. They didn't come up on price comparison website
9. Looking at big 6 enough/too much extra effort/hassle/time taken
10. Other (WRITE IN)
11. Don't know

**ASK ALL WHO SHOPPED AROUND IN LAST 3 YEARS**

E 22 Before or while you were shopping around, did you look at information about things like your energy usage, or the tariff you were on with your existing supplier, or not? DO NOT READ OUT

1. Yes
2. No – already knew it (spontaneous)
3. No
4. Don't now

**IF E22'1' ASK E23 ELSE GO TO E24**

**ASK ALL WHO CHECKED EXISTING USAGE AND/ OR TARIFF**

E 23 How much time did you spend on this? Please include all time you spent gathering up the information, looking through bills, checking your energy usage, and the details of the tariff you were on. DO NOT READ OUT BUT PROBE TO PRECODES

INTEVIEWER NOTE: THIS INCLUDES ONLY ACTUAL TIME SPENT LOOKING, NOT TOTAL ELAPSED TIME LOOKING TOOK PLACE OVER

1. 10 minutes or less
2. 10 but less than 20 minutes
3. 20 but less than 30 minutes
4. 30 minutes but less than an hour
  5. 1 but less than 2 hours
  6. 2 but less than 3 hours
  7. 3 but less than 4 hours
  8. 4 but less than 5 hours
  9. 5 but less than 10 hours
  10. 10 but less than 20 hours
  11. 20 hours or more
  12. Don't know

### ASK ALL WHO SHOPPED AROUND IN LAST 3 YEARS

E 24 How much time did you spend looking for information about other suppliers, and comparing this against your own supplier? DO NOT READ OUT BUT PROBE TO PRECODES

INTEVIEWER NOTE: THIS INCLUDES ONLY ACTUAL TIME SPENT LOOKING, NOT TOTAL ELAPSED TIME LOOKING TOOK PLACE OVER

1. 10 minutes or less
2. 10 but less than 20 minutes
3. 20 but less than 30 minutes
4. 30 minutes but less than an hour
  5. 1 but less than 2 hours
  6. 2 but less than 3 hours
  7. 3 but less than 4 hours
  8. 4 but less than 5 hours
  9. 5 but less than 10 hours
  10. 10 but less than 20 hours
  11. 20 hours or more
  12. Don't know

E 25 I am now going to read out different aspects of shopping around for energy suppliers, and I'd like you to tell me how easy or difficult each aspect was for you, using the following scale, when you last shopped around (for your {textfill fuel type}). READ OUT SCALE.

- Very easy
- Fairly easy
- Neither easy nor difficult
- Fairly difficult
- Very difficult
- Don't know [DO NOT READ OUT]

So, first of all .... READ OUT EACH FEATURE IN TURN [NOT RANDOMISED]

- Finding out information about your own energy use and tariff [ONLY IF YES AT E22]
- Finding out information about other suppliers
- Understanding the options available to you
- Making comparisons between all the options available to you
- The overall task of shopping around

E 26 What if anything did you dislike about the task of shopping around? DO NOT READ OUT BUT PROBE TO PRECODES. PROMPT: What else? PROMPT UNTIL NO

**Searching for alternative**

1. Too much effort / can't be bothered
2. Takes too long / would take too long/haven't got time
3. Don't know how to do it
4. Difficult to find information (include information about own tariffs/bills/usage/other suppliers)
- 14.
5. Don't understand/difficult to compare tariffs
6. Lack of confidence / trust in price comparison websites

**General**

7. Not interested
8. Too complicated
9. Didn't know you could
- 15.
10. Nothing specific
11. Other (specify)
12. Don't know

E 27 The last time you shopped around for a different supplier, did you find a deal from another supplier that looked better than your existing deal, or not?

1. Yes
2. No
3. Don't know

E 28 Did you switch or are you in the process of switching energy supplier after you last shopped around, or not?

1. YES – SWITCHED
2. YES – IN PROCESS OF SWITCHING
3. NO
4. DON'T KNOW

if E28'1 or 2' go to E30. IF e28 '3' ASK E29. else go to FILTER BEFORE e30  
ASK ALL WHO DIDN'T SWITCH ON LAST SHOPPING AROUND OCCASION

E 29 Why did you not switch supplier? PROMPT: Why else? PROMPT UNTIL NO  
USE CODES FROM E15

**INTERVIEWER: IF RESPONDENT SAYS "HAPPY WITH/LIKE CURRENT  
SUPPLIER" THEN PROMPT: WHAT DO YOU LIKE ABOUT YOUR  
EXISTING SUPPLIER?**

1. Existing tariff is satisfactory
2. Didn't think I'd save enough
3. Confident I'm on the best deal for me
4. Payment / direct debit all set up

#### **Quality / reliability – existing**

5. Good service from existing supplier (including customer service, reliable supply etc)
6. Get accurate/useful/informative/clear bills on time

#### **Existing supplier characteristics**

7. Good reputation - existing
8. Green credentials - existing
9. Ethical credentials – existing

#### **Additional features / services of existing**

10. Customer loyalty scheme (e.g. perks, reward points, vouchers, cashback)
11. Range of other products e.g. Boiler maintenance/home care  
service/emergency repair

#### **Searching for alternative**

12. Too much effort / can't be bothered
13. Takes too long / would take too long/ don't have time
14. Don't know how to do it
15. Difficult to find information (include information about own  
tariffs/bills/usage/other suppliers)
16. Don't understand /difficult to compare tariffs

#### **Switching to alternative**

17. In debt to supplier
18. Unable to - landlord won't allow

**General**

- 19. Not interested
- 20. Too complicated
- 21. Didn't know you could
- 22. All suppliers are much the same/no difference
- 23. Nothing specific
- 24. Other (specify)
- 25. Don't know

**IF E2 E '1' OR E28'1' ASK E30 ELSE GO TO F1**  
**ASK ALL WHO HAVE EVER SWITCHED**

E 30 When was the last time that you switched to a different energy supplier? **DO NOT READ OUT – PROBE TO PRECODES**

- 1. Within last 3 months
- 2. Within last 6 months
- 3. Within last 9 months
- 4. Within last year
- 5. Within last 2 years
- 6. Within last 3 years
- 7. More than three years ago
- 8. Don't know

**IF E30'7 OR 8' GO TO F1 ELSE ASK E31**

**SWITCHING**

**ASK ALL WHO HAVE SWITCHED IN LAST 3 YEARS**

E 31 How many times in the last three years have you switched to a different supplier (for your {textfill fuel type} after shopping around?)

**INTERVIEWER NOTE: IF IN PROCESS OF SWITCHING, COUNT THIS AS A SWITCH**

- 1. Once
- 2. Twice
- 3. Three times
- 4. Four times
- 5. Five times
- 6. More than five times
- 7. Don't know

E 32 (Thinking about the last time you switched), did you use a price comparison website to find out information about the new supplier, or not? ADD IF NECESSARY: Price comparison websites allow you to compare prices from a number of energy suppliers on the same website.

1. Yes
2. No
3. Don't know

**IF E32'1' ASK E33 ELSE GO TO E35**

**ASK ALL WHO USED PRICE COMPARISON WEBSITE**

E 33 How many price comparison websites did you go to?

1. One
2. Two
3. Three or more
4. Don't know

E 34 Did you actually make the switch to the new supplier via a price comparison website, or not?

INTERVIEWER NOTE – TELEPHONING THE PCW COUNTS AS YES. RINGING A NUMBER GIVEN ON THE PCW FOR THE ENERGY COMPANY COUNTS AS NO

1. Yes
2. No
3. Don't know

**IF E34'2' ASK E35. ELSE GO TO E36**

**ASK ALL WHO DID NOT SWITCH VIA A PRICE COMPARISON WEBSITE**

E 35 How did you make contact with the new supplier to arrange the switch? **DO NOT READ OUT BUT PROBE TO PRECODES.**

1. Online (incl. email)
2. Telephone
3. Post
4. Collective switching (e.g. Council)
5. Face to face
6. They contacted me
7. Other (WRITE IN)
8. Don't know

**ASK ALL WHO SWITCHED IN LAST 3 YEARS**

E 36 What made you decide to go ahead and switch supplier. DO NOT READ OUT BUT PROBE TO PRECODES. PROMPT: What else? PROMPT UNTIL NO. IF RESPONDENT JUST SAYS "TO SAVE MONEY" PROBE FOR DETAIL ON HOW THY WOULD SAVE

**Cost / tariff**

1. Cheaper tariff
2. Amount I expected to save/looking to save money

3. Payment options (online, payment schemes, flexibility, direct debit)
  4. Problems with direct debit / payment e.g. set too high
  5. Wanted to fix the rate
  6. Wanted dual fuel/same supplier for gas and electricity
  7. Received very high bill
  8. Price increase announcement
9. Annual summary / other communication from existing supplier
- 16.

### **Quality / reliability - existing**

10. Poor service from existing supplier (including customer service, reliable supply etc)
11. Don't / didn't get accurate/useful/informative/clear bills on time

### **Supplier characteristics**

12. Heard good things about other supplier/s
13. Other supplier seemed greener
14. Other supplier seemed more ethical
15. Other supplier seemed better (general)

### **Additional features / services of existing**

16. Wanted customer loyalty scheme (e.g. perks, reward points, vouchers, cashback)
17. Wanted other services e.g. boiler maintenance/home care service/emergency repair
18. Wanted smart meter / way of monitoring usage

### **Searching for alternative**

- 17.
18. **Other**
19. Wanted to try another supplier
20. Moved home
21. TV / Press / political stories about energy market
22. Advertising / promotion / offers from other supplier/s
23. Recommendation from family / friends / colleagues
24. Nothing specific
25. Other (specify)
26. Don't know

**IF E36 '1, OR 2' ASK E37. ELSE IF E36'8 OR 9' GO TO E41. ELSE GO TO E43  
ASK THOSE WHO SWITCHED BECAUSE OF COST/TARIFF REASONS**

E 37 How confident were you at the time of switching that you would save money? Would you say ... READ OUT.

1. Very confident
2. Fairly confident
3. Not very confident
4. Not at all confident
5. Don't know (DO NOT READ OUT)

E 38 How much did you expect to save by switching supplier? INTERVIEWER TYPE IN. ALLOW RESPONDENT TO GIVE £ AMOUNT PER MONTH, OR £ AMOUNT PER YEAR.

IF % GIVEN PROBE FOR MONEY AMOUNT

- £ per month
- £ per year
- Don't know

CATI CHECK: IF AMOUNT >100 PER MONTH OR >1200 A YEAR ADD SOFT CHECK "CAN I JUST CHECK, IS {TEXTFILL AMOUNT} THE RIGHT ANSWER. IF YES GO TO NEXT Q, IF NO GO BACK AND CORRECT

IF E38 DON'T KNOW GO TO FILTER BEFORE E41. ELSE ASK E39  
ASK THOSE WHO COULD ESTIMATE EXPECTED SAVINGS

E 39 Do you feel you have actually made these savings you were expecting or not?

1. Yes
2. No
3. Too soon to tell
4. Don't know

IF E39 '2' ASK E40 ELSE GO TO FILTER BEFORE E41  
ASK THOSE WHO DID NOT MAKE EXPECTED SAVINGS

E 40 Would you say you have saved any money with your new supplier, or that you are paying more money, or has the switch made no difference?

1. Saved money
2. No difference
3. Paying more money
4. Don't know

IF E36'8 OR 9' ASK E41 ELSE GO TO E43  
ALL WHO MENTIONED CUSTOMER SERVICE AS A REASON FOR SWITCHING

E 41 How confident were you that you would get better customer service with your new supplier? Would you say ... READ OUT.

1. Very confident
2. Fairly confident
3. Not very confident
4. Not at all confident

5. Don't know (DO NOT READ OUT)

E 42 In practice, is the customer service you are receiving from your new supplier better or worse than you received from your old supplier, or is it no different?

1. New supplier is better
2. No different
3. New supplier is worse
4. Too soon to tell
5. Don't know

#### ASK ALL WHO SWITCHED IN LAST THREE YEARS

E 43 How easy or difficult was it to make the switch to a different supplier? Would you say.... READ OUT

1. Very easy
2. Fairly easy
3. Neither easy nor difficult
4. Fairly difficult
5. Very difficult
6. Don't know (DO NOT READ OUT)

E 44 What difficulties if any did you encounter with the switch? PROMPT: What else? PROMPT UNTIL NO. DO NOT READ OUT BUT PROBE TO PRECODES

#### Cost

1. Large final bill from existing supplier
2. Exit fees from existing supplier
3. Expected savings did not materialise

#### Process

16. Delay or other problems with refunding surplus
  4. Delays in or length of switching process
  5. Previous supplier delayed process
  6. Issues with new supplier
  7. Too much effort involved
  8. Spent too much time on the phone
  9. Things went wrong during switching process
  10. Lost energy supply
  11. Failed credit check
  12. Meter readings

- 13. Other (WRITE IN)
- 14. None – no difficulties
- 15. Don't know

E 45 The last time you switched ([text fill fuel type] which supplier did you switch from? **DO NOT READ OUT**

19.

- 1. British Gas (Centrica)
- 2. Co-operative Energy (Midcounties Co-operative Ltd)
- 3. E.ON
- 4. Ebico (Eqipower/Equigas)
- 5. Ecotricity
- 6. Extra Energy
- 7. EDF Energy
- 8. First Utility
- 9. Good Energy
- 10. Marks and Spencer Energy
- 11. Npower/ RWE Npower
- 12. Ovo Energy (Woodland Trust)
- 13. Sainsbury's Energy
- 14. Scottish Gas
- 15. Scottish Power
- 16. Spark Energy
- 17. SSE Atlantic
- 18. SSE Scottish Hydro
- 19. SSE (Scottish and Southern Energy)
- 20. SSE Southern Electric
- 21. SSE Swalec
- 22. Utilita
- 23. Utility Warehouse
- 24. Other (Write in)
- 25. Don't know

E 46 Overall, are you more satisfied with your new supplier compared with your previous supplier, less satisfied, or is there no difference? IF MORE/LESS SATISFIED: Is that a lot more/less or a little more/less satisfied?

- 1. A lot more satisfied with new supplier
- 2. A little more satisfied
- 3. No difference
- 4. A little less satisfied
- 5. A lot less satisfied with new supplier
- 6. Don't know



## F Future Switching

I am now going to ask you some questions about the future.

ASK ALL WHO THINK IT IS POSSIBLE OR DON'T KNOW WHETHER IT IS POSSIBLE TO SWITCH SUPPLIER OR CHANGE PAYMENT METHOD (EXCLUDE THOSE WHO SAID NOT POSSIBLE TO ALL THREE STATEMENTS AT E1)

F 1 How likely is it that you will consider switching your supplier for {textfill fuel type} in the next three years? Would you say ....READ OUT

INTERVIEWER NOTE IF CONSIDERING NOW CODE AS VERY LIKELY

1. Very likely
2. Fairly likely
3. Neither likely or unlikely
4. Fairly unlikely
5. Very unlikely
6. Don't know (DO NOT READ OUT)

IF F1 '45' ASK F2 ELSE GO TO F3

ASK ALL UNLIKELY TO SWITCH IN NEXT THREE YEARS

F 2 Why are you unlikely to consider switching supplier in the next three years? DO NOT READ OUT PROMPT: Why else? IF RESPONDENT SAYS "Happy with/like existing supplier THEN PROMPT: "What do you like about your existing supplier

PROMPT UNTIL NO

### Cost / tariff

1. Existing tariff is satisfactory
2. Didn't think I'd save enough
3. Concerned about exit fees/on fixed tariff
4. Payment / direct debit all set up

### Quality / reliability - existing

5. Good quality service from existing supplier (including customer service, reliable supply etc)
6. Get accurate/useful/informative/clear bills on time

### Existing supplier characteristics

7. Good reputation - existing supplier
8. Green credentials - existing supplier
9. Ethical credentials - existing supplier

### Other supplier

10. Don't like other suppliers / no-one I'd want to switch to

### Additional features / services of existing

- 11. Customer loyalty scheme (e.g. perks, reward points, vouchers, cashback)
- 12. Range of other products e.g. Boiler maintenance

### **Searching for alternative**

- 13. Too much effort / can't be bothered
- 14. Takes too long/would take too long/don't have time
- 15. Difficult to find information (include information about own tariffs/bills/usage/other suppliers)
- 16. Don't understand /difficult to compare suppliers

### **Switching to alternative**

- 17. Too much effort / can't be bothered
- 18. Takes too long/would take too long/don't have time
- 19. Things might go wrong / worried about moving

### **General**

- 20. Don't know how to do it
- 21. Not interested
- 22. Too complicated
- 23. All suppliers are much the same / no difference
- 24. Nothing specific
- 25. Other (specify)
- 26. Don't know

ASK ALL WHO THINK IT IS POSSIBLE OR DON'T KNOW WHETHER IT IS POSSIBLE TO SWITCH SUPPLIER OR CHANGE PAYMENT METHOD (EXCLUDE THOSE WHO SAID NOT POSSIBLE TO ALL THREE STATEMENTS AT E1)

F 3 How easy or difficult do you think it would be to find out what was the right deal for you? Would you say ... READ OUT

- 1. Very easy
- 2. Fairly easy
- 3. Neither easy nor difficult
- 4. Fairly difficult
- 5. Very difficult
- 6. Don't know (DO NOT READ OUT)

F 4 How confident are you that you would be able to make the right decision if you wanted to switch energy supplier? Would you say ... READ OUT

- 1. Very confident
- 2. Fairly confident
- 3. Not very confident
- 4. Not at all confident
- 5. Don't know (DO NOT READ OUT)

F 5 What would be the minimum amount of money you would have to save to encourage you to switch your {textfill fuel type) supplier? Just approximately. INTERVIEWER TYPE IN. ALLOW RESPONDENT TO GIVE £ AMOUNT PER MONTH, OR £ AMOUNT PER YEAR.

IF % GIVEN PROBE FOR MONEY AMOUNT

£ per month  
£ per year  
Don't know

CATI CHECK: IF AMOUNT >100 PER MONTH OR >1200 A YEAR ADD SOFT CHECK "CAN I JUST CHECK, IS {TEXTFILL AMOUNT} THE RIGHT ANSWER. IF YES GO TO NEXT Q, IF NO GO BACK AND CORRECT

**G ATTITUDES TOWARDS ENERGY**

G 1 I am now going to read out a number of statements that other people have made about energy suppliers, and I'd like you tell me how much you agree or disagree with each using the following scale.

**READ OUT SCALE**

Agree strongly

Tend to agree

Neither agree nor disagree

Tend to disagree

Disagree strongly

Don't know [DO NOT READ OUT]

So first of all .... READ OUT EACH STATEMENT IN TURN. RANDOMISED ORDER.

- I take an active interest in my energy usage and expenditure
- There are no real differences between suppliers in the prices they charge
- Switching is a hassle I do not have time for
- I worry that if I switch that things will go wrong

## H INTERNET USAGE/PCWS

H 1 The next few questions are about using the internet. Do you have access to the internet at home, work or via a mobile device?

1. Yes
2. No
3. Don't know

**IF H1'1' ASK H2 ELSE GO TO I1**

**ASK ALL WHO HAVE ACCESS TO THE INTERNET**

H 2 How confident are you about using the internet to search for information about suppliers of different products or services in general? Would you say ... READ OUT

1. Very confident
2. Fairly confident
3. Not very confident
4. Not at all confident
5. Don't know (DO NOT READ OUT)

H 3 As you probably know, price comparison websites allow you to compare prices from a number of suppliers for products and services on the same website. How confident are you that you would be able to get the right deal for your energy supply using a price comparison website? Would you say ... READ OUT

1. Very confident
2. Fairly confident
3. Not very confident
4. Not at all confident
5. Don't know (DO NOT READ OUT)

**IF H3 '3 OR 4' ASK H5 ELSE GO TO I1**

**ASK ALL NOT CONFIDENT ABOUT GETTING RIGHT DEAL FROM PCW**

H 4 Why would you not feel confident in using a price comparison website to get the right energy deal? DO NOT READ OUT. PROBE TO PRECODES

1. Don't trust/believe Price Comparison Websites
2. Do not include all supplier prices
3. Would need to know details of my own personal consumption/usage
4. Information too complex – not sure what would be the right deal
5. Disability/health problems make it difficult to use
6. Prefer to speak to someone
7. Other (WRITE IN)
8. Don't know

**I OTHER MARKETS**

We would now just like to ask you about switching suppliers in general.

I 1 In which if any of the following have you changed supplier within the last three years? If you don't have one of these please say so. READ OUT

SCALE yes - changed/no – haven't changed/don't have service FOR EACH RANDOMISE ORDER

1. Mobile phone network provider
2. Car insurance
3. Current account
4. Mortgage
5. None of these (DO NOT READ OUT)
6. Don't know

I 2 Have you ever used a price comparison website to search for information for anything apart from energy supply, such as for insurance or broadband?

1. Yes
2. No
3. Don't know

IF I2'1' THEN ASK I3. OTHERWISE GO TO I4

I 3 And have you ever used a price comparison website to switch supplier for anything apart from energy supply?

1. Yes
2. No
3. Don't know

I 4 To what extent do you trust or distrust the following types of organisation to treat you in a fair and honest way. Please use this scale when giving your answer. READ OUT SCALE

Trust strongly  
Tend to trust  
Neutral  
Tend to distrust  
Distrust strongly  
Don't know (DO NOT READ OUT)

So, first of all .... READ OUT ORGANISATION. RANDOMISE ORDER

CATI – KEEP FIRST TWO CODES TOGETHER AND RANDOMISE. IF NOT POSSIBLE TO RANDOMISE WITH THESE TWO CODES KEPT TOGETHER PUT THE STATEMENTS IN THE MIDDLE

OWN (CATI OTHER ENERGY MUST ALWAYS COME UNDER YOUR ENERGY (COMPANY/COMPANIES))

- Your own energy (company/companies)
- Other energy companies
- Mobile phone network providers
- Car insurance
- Banks offering current accounts
- Local authority/council

**J GENERAL ATTITUDES**

J 1 I am going to read out a number of statements, and I'd like you tell me how much you agree or disagree with each using the following scale.

**READ OUT SCALE**

Agree strongly

Tend to agree

Neither agree nor disagree

Tend to disagree

Disagree strongly

Don't know [DO NOT READ OUT]

So first of all .... READ OUT EACH STATEMENT IN TURN. RANDOMISED ORDER.

CATI – KEEP FIRST TWO CODES TOGETHER AND RANDOMISE. IF NOT POSSIBLE TO RANDOMISE WITH THESE TWO CODES KEPT TOGETHER PUT THE STATEMENTS IN THE MIDDLE

- I like to shop around for the best deal
- I don't have time to spend shopping around for the very best deals
- I stick with brands I like
- Financially things are a bit of a struggle for me at the moment
- I consider the effect on the environment when making decisions
- I often make a decision on impulse

**K CLASSIFICATION**

K 1 These last few questions are for classification purposes only. What is your age? INTERVIEWER CODE EXACT AGE code to scale if refuse exact age

1. 18-24
2. 25-34
3. 35-44
4. 45-54
5. 55-64
6. 65-79
7. 80 +
8. Refused

K 2 Record gender of respondent

1. Male
2. Female

K 3 Which, if any, of these things apply to you? READ OUT AND CODE EACH IN TURN

- A Do you look after or give special help to someone living with you who is sick, disabled or elderly
- B Do you have a long term physical, sensory or mental impairment which limits your daily activities or the work you can do
- C Arroyo the single parent or guardian of a child living in this household who is aged 16 or under
1. Yes
  2. No
  3. Refused

K 4 What is the highest level of educational qualification you have achieved, if any? DO NOT READ OUT BUT PROBE TO PRECODES. SINGLE CODE ONLY

1. Degree level or above - Includes any degree, PGCE, HND, NVQ Level 4
2. A levels – includes Advanced GNVQ, NVQ Level 3,
3. O levels or GCSEs, GNVQ NOT advanced, NVQ level 1 or 2
4. Any other kind of qualification
5. No qualifications

IF OTHER K4=4 FOLLOW UP WITH

K4a Can I just check, do you have either of these? READ OUT AND CODE FIRST TO APPLY

1. An A-level, Advanced GNVQ or NVQ level 3
2. An O-Level or any other GNVQ or NVQ
3. Neither of these

K 5 Do you .... READ OUT. SINGLE CODE ONLY

1. Own your house outright
2. Own your house but with a mortgage
3. Rent your property from a private landlord
4. Rent your property from a social landlord
5. Other

K 6 Some people have difficulties paying for energy, so it is important for the Competition and Markets Authority to understand how people's household income affects their views about energy.

Please could you tell me your household's TOTAL income, BEFORE tax? This includes earnings from wages, benefits and pensions.

You can answer in annual, weekly or monthly terms – whichever is easiest for you.

IF RESPONDENT DOES NOT KNOW EXACT AMOUNT, ACCEPT BEST ESTIMATE.

IF NECESSARY: Income information will only be used for analysis purposes.

<b>Annual</b>	<b>Monthly</b>	<b>Weekly (grid)</b>
Under £6,000	Under £500	Under £120
£6,000 - £11,999	£500 - £999	£120 - £239
£12,000 - £17,999	£1,000 - £1,499	£240 - £359
£18,000 - £23,999	£1,500 - £1,999	£360 - £479
£24,000 - £35,999	£2,000 - £2,999	£480 - £719
£36,000- £49,999	£3,000 - £4,166	£720 -£999
£50,000 or more	£4,167 or more	£1,000 or more

Don't know

Refused

K 7 Thank you very much for your help; that is the end of the interview. We may be conducting further research on this subject. Would you be willing to be re-contacted by any of the following about this research? READ OUT AND CODE ALL THAT APPLY

1. Competition and Markets Authority
2. GfK NOP
3. Another research agency
4. No – none of these

K 8 May we re-contact you in relation to this specific research project should any queries arise?

1. Yes
2. No

K 9 Please can I just confirm your name?  
ENTER NAME OR REFUSED

If you would like to check my company's credentials you can call the Market Research Society, free from a UK landline. Would you like the number?

**IF YES:** It's 0500396999, they will confirm GfK NOP are a genuine market research company. If calling from a mobile you will be charged for the call

**ADD IF NECESSARY:** Or you can visit the MRS Website at [www.mrs.org.uk](http://www.mrs.org.uk)



## **APPENDIX C – ADVANCE LETTER**

«Main\_customer\_contact\_name»  
«Electricity\_postal\_billing\_address\_line\_»  
«Electricity\_postal\_billing\_address\_line1»  
«Electricity\_postal\_billing\_address\_line2» «Electricity\_postal\_billing\_address\_line3»  
«Electricity\_postcode\_for\_billing\_address»

<<date>>

Dear «Main\_customer\_contact\_name»

### **Investigation into the Energy Market**

The Competition and Markets Authority (CMA), an independent public body promoting competition for the benefit of consumers, is currently investigating the energy market in Great Britain. More details may be found on the CMA website. As part of this work, we have asked an independent research company, GfK NOP, to undertake a telephone survey on our behalf. We would be really grateful for your help.

### **Why did we choose you?**

Your name has been selected at random from a list of gas and electricity customers. We have used our legal powers to require your energy supplier to share customer information with GfK. This applies even though you may have opted out of further communication from your current supplier. Your personal data and your survey answers will be treated in the strictest confidence and protected at every stage, as required by the law.

### **What happens next?**

An interviewer from GfK will try to contact you by telephone in the near future. If it's not convenient to conduct the interview then, they will be happy to arrange a time that suits you. We do hope that you will agree to participate in this research study, which is very important for this market investigation.

However, if you do not want to take part, please telephone GfK within the next 5 days on 0800 0564536 which is free from landlines, or email [competitionandmarketsauthority@gfk.com](mailto:competitionandmarketsauthority@gfk.com). If you do call, please leave your name, and quote the following **reference number «serial»**, and you will not be contacted by GfK.

Yours faithfully

Erika Lewis, *Inquiry Director*

## APPENDIX D – OUTCOME CODES

Code from Section 3	Includes
Wrong numbers/non-residential	Number unobtainable Undiallable Business Not main address Customer moved/deceased No mains gas or electricity Not decision-maker
Asked to be removed from survey	
Refused when telephoned	Refused at introduction Refused during screening Quit during interview
Other non-interviews	no reply Voicemail/answerphone Callbacks Engaged Language problems
Interviews	



## APPENDIX E – TABULATION SPECIFICATIONS

### Demographic Crossbreak

Age	18-44	K1=1/2
	45-64	K1=3/4
	65+	K1=5/6/7
	Refused	K1=8
Gender	Male	K2=1
	Female	K2=2
Education	Degree	K4 = 1
	A Level	K4 = 2
	O levels / other	K4=3/4
	No qualification	K4=5
Income	£36,000 or more	£36,000 or more
	£18,000 - £35,999	£18,000 - £35,999
	under £18,000	under £18,000
Tenure - type	Owned outright/mortgage	K5 = 1/2
	Private Rented	K5 = 3
	Social Rented	K5 = 4
Tenure - length	<3 year	A5=1,2,3,4
	3-10 years	A5=5,6,7
	10 + years	A5=8,9



## Customer crossbreak

Decision maker	Main	A1=1
	Joint	A1=2
Date Joined	Elec - <3 Years	Database
	Elec - 3-10 Years	Database
	Elec - 10+ Years	Database
	Gas - <3 Years	Database
	Gas - 3-10 Years	Database
	Gas - 10+ Years	Database
Vulnerable	Carer	K3, A=1
	Disability	K3, B=1
	Single parent	K3, C=1
Priority service register	Yes	From database registered_on_PSR = 1
	No	From database registered_on_PSR = 0
Vulnerability indicator	Yes	From database vulnerability_ind = 1
	No	From database vulnerability_ind = 0
Warm home discount	Yes	From database recipient_of_WHD = 1
	No	From database recipient_of_WHD = 0
Financial Struggle	Agree, Tend to Agree	J1iv=1,2
	Neither	J1iv=3
	Disagree, Disagree Strongly	J1iv=4,5



### Supply information crossbreak

Fuel	Mains gas and electricity (one supplier)	A6=3, A7=2
	Mains gas and electricity (two supplier)	A6=3, A7=1
	Mains electricity only	A6=2
	Mains gas only	A6=1
Tariff	Fixed (If the have same supplier for both fuels and both tariffs are fixed, or if they are only sampled only on one fuel if that tariff is fixed)	Database - ElecTariff_Fixed, GasTariff_Fixed
	Variable (as above)	Database - ElecTariff_Variable, GasTariff_Variable
	Other (as above)	Database - ElecTariff_Capped, ElecTariff_Green, ElecTariff_Other, gas_tariff_type_green, gas_tariff_type_other
	Mix (ie if both fuels from sample supplier but different tariff type)	Database - ElecTariff_Fixed, GasTariff_Fixed, ElecTariff_Variable, GasTariff_Variable, ElecTariff_Capped, gas_tariff_type_capped, ElecTariff_Green, gas_tariff_type_green, ElecTariff_Other, gas_tariff_type_other
Payment Type	Direct Debit (equivalent rule to tariff)	Database - ElecPaymentMethod_DD, gas_paymeth_DD
	Credit (as above)	Database - ElecPaymentMethod_Credit, gas_paymeth_credit
	Pre-payment (as above)	Database - ElecPaymentMethod_Prepayment, gas_paymeth_PP
	Other (both fuels - eg fuel direct, payment book)	Database - ElecPaymentMethod_FuelDirect, gas_paymeth_FD
	Mix(ie if both fuels from sample supplier but different payment method type)	Database - ElecPaymentMethod_DD, gas_paymeth_DD, ElecPaymentMethod_Credit, gas_paymeth_credit, ElecPaymentMethod_Prepayment, gas_paymeth_PP, ElecPaymentMethod_FuelDirect, gas_paymeth_FD
Meter	Elec - All Elec Meters	Database - ElectricityMeterType_Standard, ElectricityMeterType_MultiRate, ElectricityMeterType_PrePayment, ElectricityMeterType_Smart, ElectricityMeterType_PP
	Elec - Multi-rate (E7/E10)	Database - ElectricityMeterType_MultiRate
	Elec - PPM	Database - ElectricityMeterType_PrePayment
	Elec - Smart	Database - ElectricityMeterType_Smart



	Gas - All Gas Meters	Database - gas_meter_type_std, gas_meter_type_pre_pay, gas_meter_t gas_meter_type_other
	Gas - PPM	Database - gas_meter_type_pre_pay
	Gas - Smart	Database - gas_meter_type_smart



### Usage crossbreak

Consumption	Elec	High	High = 4900 or more	Database - MostRecentEAC
		Medium	Medium = 2001 to 4899	
		Low	Low = 2,000 or less	
	Gas	High	High = 19000 or more	Database - aq_2013
		Medium	Medium = 9001 to 18999	
		Low	Low = 9000 or less	
Expenditure	Elec	High	£601 or more	Database - ele_projected_spend
		Medium	£395 to £600	
		Low	under £395	
	Gas	High	£713 or more	Database - gas_projected_spend_2014_cons
		Medium	£490 – £712	
		Low	under £489	
TCR	Elec	High	£0.1637 or more	Database - ElecTariffComparisonRate
		Medium	£0.1528 to £0.1636	
		Low	under £0.1528	
	Gas	High	£0.0509 or more	Database - gas_tcr
		Medium	£0.0468 to £0.0508	
		Low	under £0.0468	



### Attitudes crossbreak

Trust organisations	Trusting	
	Neutral	
	Not trusting	

Add scores from each statement together (exclude own energy company)  
Trust strongly ='1'  
Tend to trust ='2'  
Neutral = '3'  
Tend to distrust ='4'  
Distrust strongly='5'

So if a respondent said:  
Neutral  
Tend to distrust  
Trust strongly  
Neutral  
Distrust strongly

They would have an overall score of 15.  
Calculate a score for each person and list the scores in ascending order. Split the list in three equal proportions.

Trusting = lowest third  
Neutral = middle third  
Not trusting = highest third

Do not include don't know in the calculation



Trust own energy company	Trust - own supplier at all	I4=1/2 for own energy company
		<p>Derive from I4 Score for own energy company must be higher than that of other energy company. Look at code 1 and 2 (top 2 trust answers)</p> <p>e.g. if say code tend to trust at own energy company to qualify for this cross break they must say codes neither/nor to strongly distrust other energy company if say trust strongly own energy company then other energy company must be a code tend to trust to distrust strongly</p>
	Trust more than other energy companies	
	Don't trust own or other energy companies	Tend to distrust or distrust strongly at own energy company and other energy companies
Choice drivers	Tariff - cheap	D2a - Essential
	Tariff -simple	D2b - Essential
	Tariff - tailored	D2a - Essential
	Other services	D2a - Essential
	Smart meters	D2a - Essential
	Actual not estimated	D2a - Essential
	Customer service	D2a - Essential



Large brand

D2a - Essential



## Attitudes crossbreak 2

Attitudes - energy	Interested	G1a=1/2	
	Neither/nor interested	G1a=3	
	Uninterested	G1a=4/5	
	No difference on price	G1b=1/2	
	Neither/nor price	G1b=3	
	Difference on price	G1b=4/5	
	Switching hassle	G1c=1/2	
	Neither/nor switching	G1c=3	
	Switching not a hassle	G1c=4/5	
	Worry	G1d=1/2	
	Neither/nor worry	G1d=3	
	Don't worry	G1d=4/5	
	Attitudes - general	Shop around	J1a=1/2
		Neither/nor shop around	J1a=3
Don't shop around		J1a=4/5	
Don't have time		J1b=1/2	
Neither/nor time		J1b=3	
Have time		J1b=4/5	
Brand loyal		J1c=1/2	
Neither/nor loyal		J1c=3	
Not brand loyal		J1c=4/5	
Consider environment		J1e=1/2	
Neither/nor environment		J1e=3	
Don't consider environment		J1e=4/5	
Impulse		J1f=1/2	
Neither/nor impulse		J1f=3	



Not on impulse

J1f=4/5



### Confidence/capability crossbreak

Internet	Internet Access	H1=1
	No Access	H1 = 2
	Searching - confident	H2=1/2
		H2 = 3/4
PCW	Searched or switched - general	I2 = 1
	Switched - general	I3=1
	Energy PCW - Confidence	H3=1,2
	Energy PCW - Not confident	H3=3,4
Energy confidence	On right deal - very confident	B14=1
	On the right deal - fairly confident	B14=2
	On the right deal - not confident	B14=3,4
	Easy to search	F3=1,2
	Neither/nor easy to search	F3=3
	Not easy to search	F3=4,5
	Conf right decision if switch	F4 = 1,2
	Not confident in decision if switch	F4 = 3,4
Awareness	Possible to change tariff - existing	E1A=1
	Possible to payment	E1B=1
	Possible to switch	E1C=1
	Correctly identified on fixed/variable	B13 + Database
	Incorrectly identified tariff	B13 + Database



## Experiences crossbreak

Experience	Switched - Ever	E2, E=1
	Switched - Last year	E2, E=1 AND E30=1,2,3,4
	Shopped around - new supplier - Ever	E2, D=1
	Shopped around - new supplier - Last year	E2, D=1 AND E17=1,2,3,4
	Decided new tariff - existing	E2, B=1
Consider switching	Considered/shopped/switched	E13 $\neq$ 2 (including everyone who has been filtered out and so not been asked question - so if 7k sampled, and 500 respond are coded 2 for E13 this contains 6500=7000-500)
	Not considered/shopped/switched	E13=2
	Future switching - likely	F1=1,2
	Future switching - neither/nor	F1=3
	Future switching - unlikely	F1=4,5
Switched - other markets	One	Derived I1
	More than one	Derived I1
	None	I1=5
Switching experience	Didn't make expected savings	E39 = 2
	Worse customer service	E42=3 (note no response into this category thus far, may drop this)
	Less satisfied after switch	E46= 4,5
	Problems with switch	E44 $\neq$ None
Shopping experience	Find out info your supplier - easy	E25A=1,2
	Find out info your supplier - not easy	E25A=3,4,5



	Find out info other suppliers - easy	E25B=1,2
	Find out info other suppliers - not easy	E25B=3,4,5
	Understand options available - easy	E25C=1,2
	Understand options available - not easy	E25C=3,4,5
	Making comparisons - easy	E25D=1,2
	Making comparisons - not easy	E25D=3,4,5
	Overall task - easy	E25E=1,2
	Overall task - not easy	E25D=3,4,5



### Region crossbreak

Region	14 Regions	From database Eastern England (10) East Midlands (11) London (12) Merseyside and Northern Wales (13) West Midlands (14) North Eastern England (15) North Western England (16) Northern Scotland (17) Southern Scotland (18) South Eastern England (19)
	England	Derive based on postcode / region
	Scotland	Derive based on postcode / region
	Wales	Derive based on postcode / region
	Urban	Derived from postcodes
	Rural	Derived from postcodes



## Supplier crossbreak

Dual fuel supplier	<i>Selection rule: Customers selected for dual fuel customer if A6=3 and A7=2</i>	
	Any major/big 6	A7=2 and B1= one of big 6 / database
	Any minor	A7= 2 and B1= not one of big 6 / database
	Gas incumbent	British Gas
	Electricity Incumbent	fxtrata (in data) one of the following codes 1, 9, 17, 25, 33, 41, 57, 65, 73, 81, 89, 105
	Non-incumbent big 6 excl BG	fxtrata (in data) is one of the following codes - 3, 11, 19, 27, 35, 43, 51, 59, 67, 75, 83, 91, 99, 107
Solus electricity	<i>Selection rule: Customers selected for this if A6=2 OR A6=3 and A7=1</i>	
	Any major/big 6	B9= one of big 6 / database
	Any minor	B9 = not one of big 6 /database
	Gas incumbent	British Gas
	Electricity Incumbent	fxtrata (in data) one of the following codes 1, 9, 17, 25, 33, 41, 57, 65, 73, 81, 89, 105
	Non-incumbent big 6 excl BG	fxtrata (in data) is one of the following codes - 3, 11, 19, 27, 35, 43, 51, 59, 67, 75, 83, 91, 99, 107
Solus gas	<i>Selection rule: Customers selected for this if A6=1 OR A6=3 and A7=1</i>	
	Any major/big 6	B5= one of big 6 / database
	Any minor	B5= not one of big 6 / database
	Gas incumbent	British Gas



	Electricity Incumbent	fxtrata (in data) one of the following codes 1, 9, 17, 25, 33, 41, 57, 65, 73, 81, 89, 105
	Non-incumbent big 6 excl BG	fxtrata (in data) is one of the following codes - 3, 11, 19, 27, 35, 43, 51, 59, 67, 75, 83, 91, 99, 107

## APPENDIX F – POST-STRATIFICATION RESPONSE PROPENSITY WEIGHTING

### Summary

This note outlines the CMA's approach to non-response modelling for the energy market investigation customer survey. Non-response introduces bias if there are differences across possible respondents in both the answers they give (or would give) and their likelihood of responding to the survey. To counter this, respondents were weighted according to the inverse of their estimated likelihood of responding. These response likelihoods were estimated from a regression model which compared respondents to non-respondents using data which were available for both groups.

### Rationale

A random sample of 105,000 customers was drawn for fieldwork. The response propensities of individuals within that sample are likely to have varied, as they would be expected to in the population of energy decision-makers as a whole. If these response propensities were correlated with responses to survey questions, then estimates of response to those questions would be biased. The impact of differential response rates can be adjusted for by using weights estimated from non-response modelling as well as other post-stratification weights. The non-response modelling element is set out here.

### Methodology

A propensity adjustment cell approach was used to adjust for non-response<sup>4</sup>. The main steps in the methodology were as follows:

- (a) Prepare data for analysis.
- (b) Determine appropriate regression model through exploratory analysis.
- (c) Estimate a logistic regression model of response on the explanatory variables.
- (d) For each unit, estimate the predicted response propensity using the model.
- (e) Order units by their estimated response propensity and divide the units into 5 approximately equally sized cells on the basis of their response propensity.
- (f) Assign each cell a weighting equal to the inverse of the average response propensity.
- (g) Use these weightings to adjust for non-response in the analysis of survey data.

### Data preparation

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<sup>4</sup> For further background on this approach see Rubin and Little (Section 3.3; *Statistical Analysis with Missing Data*; Little and Rubin, 2002), and Heeringa, West and Berglund (Section 2.7.3.2; *Applied Survey Data Analysis*; Heeringa, West and Berglund; 2010).

In the data preparation stage, variables were labelled and new variables were derived. The ten largest suppliers<sup>5</sup> provided customer level records to GfK NOP Ltd. From these, GfK drew a sample of 105,000 for fieldwork and suppliers provided additional data to GfK for these sampled customers only, as required by the CMA. The CMA were sent the files<sup>6</sup> and cleaned these 105,000 records and returned them to GfK who attached detailed fieldwork outcome variables. This data covers both respondents and non-respondents. All records in the drawn sample have been included in the non-response modelling as the objective is to calculate weights which adjust for observable differences between respondents and non-respondents of all types. This cleaned dataset with fieldwork outcome variables was used as the raw dataset for the subsequent analysis.

### **Exploratory analysis**

The CMA's expectation was that the prime drivers of response were likely to relate to how interested and engaged potential respondents are in the energy market. An exploratory analysis was conducted to find candidate sets of explanatory variables for the regression models. The first stage of this analysis involved calculating correlations between whether customers responded and a range of variables from the dataset. These included meter type, consumption, standing charge and unit rates, time with supplier, payment method, tariff type, whether the customer gets fuels from the same or separate suppliers, history of tariff switches with supplier, supplier, region, whether the customer was with the regional electricity incumbent and vulnerability indicators. The second stage involved cross-tabulating response against variables which indicated correlation with response in the first stage of the exploratory analysis. Based on this, candidate explanatory variables were identified for regression analysis

### **Regression modelling**

Before a final regression model was estimated, a number of candidate regression models were derived using different explanatory variables. The final model and set of explanatory variables selected was based on three considerations

- (a) Variables were selected on the basis of their explanatory power.
- (b) If any explanatory variables were missing for a unit then we used the sample mean for those explanatory variables to estimate the response propensity for that unit<sup>7</sup>. For some potential explanatory variables, data were missing or of poor quality for a large number of units. We considered it less desirable to employ such variables, and for example did not use data related to the number of times customers changed tariff with a given supplier.
- (c) Design weights were not used in the estimation of the model. Rather, the variables used in the stratification sample design were themselves used as explanatory variables<sup>8</sup>. Supplier indicators, regional indicators, and fuel type indicators are therefore used in this way.

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<sup>5</sup> British Gas, EDF Energy, E-ON, Npower, Scottish Power, SSE, Cooperative Energy, First Utility, OVO Energy, Utility Warehouse

<sup>6</sup> For the sampled records only, and from which personal data had been removed.

<sup>7</sup> Otherwise it would not be possible to estimate the response propensity for that unit. These units are excluded from the regression models.

<sup>8</sup> See Little, R. J. and Vartivarian, S. (2003). On weighting the rates in non-response weights. *Statist. Med.*, 22: 1589–1599. doi: 10.1002/sim.1513

The purpose of the regression modelling is to estimate response propensities. A logit model was used to estimate the likelihood of response based on a set of explanatory variables. Predicted response propensities were estimated for each unit including both respondents and non-respondents.

### **Creation of propensity cells and weightings**

Units were ordered by their estimated response propensity, non-respondents were then dropped and the respondents were divided into 5 approximately equally sized cells on the basis of their response propensity. Each cell was assigned a weighting equal to the inverse of the mean response propensity for respondents in that cell. These weights were used as the non-response element of the overall survey weighting.

### **Summary of results**

The analysis suggested that there were identifiable differences between those who did and did not respond. A number of variables were found to impact response rates. Response rates were higher for respondents who are customers of some of the small providers; who do not use the incumbent provider; who pay by direct debit (lower for credit and prepayment customers); who source electricity and gas from the same supplier (lower for those who source from separate suppliers or use only one fuel) and for those who were contacted later in the fieldwork. Time with supplier also had a small effect on response rates. The difference in response propensities estimated from the model was higher for respondents than for non-respondents (8% versus 6.5%). This difference is statistically significant but not very substantial in absolute terms. The non-response weights ranged from 0.55 to 1.72 and were scaled so that they averaged 1. A comparison of responses to some key survey questions with and without non-response weighting suggested that the impact of the non-response adjustments were non-trivial, but also not particularly large. On balance, this suggests that the non-response weighting is likely to have reduced bias due to non-response and more generally increased the reliability of results.

## APPENDIX G –STRATIFICATION WEIGHTS

Stratum	Region	Fuel type	Supplier type	weight
1	East Anglia	Electricity	Electricity Incumbent	1.45156
2	East Anglia	Electricity	BG/Centrica	2.28141
3	East Anglia	Electricity	Other Big 6	2.41364
4	East Anglia	Electricity	Other 4	1.27691
5	East Anglia	Gas	BG/Centrica	1.48429
6	East Anglia	Gas	Electricity Incumbent	1.19532
7	East Anglia	Gas	Other Big 6	1.98663
8	East Anglia	Gas	Other 4	1.07910
9	East Midlands	Electricity	Electricity Incumbent	1.14704
10	East Midlands	Electricity	BG/Centrica	1.74089
11	East Midlands	Electricity	Other Big 6	1.67630
12	East Midlands	Electricity	Other 4	0.87628
13	East Midlands	Gas	BG/Centrica	1.06239
14	East Midlands	Gas	Electricity Incumbent	1.27821
15	East Midlands	Gas	Other Big 6	1.51219
16	East Midlands	Gas	Other 4	0.78704
17	London	Electricity	Electricity Incumbent	1.15385
18	London	Electricity	BG/Centrica	1.53703
19	London	Electricity	Other Big 6	1.06238
20	London	Electricity	Other 4	0.59146
21	London	Gas	BG/Centrica	1.12541
22	London	Gas	Electricity Incumbent	0.89247
23	London	Gas	Other Big 6	0.93408

24	London	Gas	Other 4	0.52506
25	Merseyside	Electricity	Electricity Incumbent	0.60182
26	Merseyside	Electricity	BG/Centrica	1.08045
27	Merseyside	Electricity	Other Big 6	0.85689
28	Merseyside	Electricity	Other 4	0.49043
29	Merseyside	Gas	BG/Centrica	0.66829
30	Merseyside	Gas	Electricity Incumbent	0.53414
31	Merseyside	Gas	Other Big 6	0.77030
32	Merseyside	Gas	Other 4	0.43133
33	Midlands	Electricity	Electricity Incumbent	0.81907
34	Midlands	Electricity	BG/Centrica	1.70282
35	Midlands	Electricity	Other Big 6	1.72228
36	Midlands	Electricity	Other 4	0.88973
37	Midlands	Gas	BG/Centrica	1.06876
38	Midlands	Gas	Electricity Incumbent	0.68178
39	Midlands	Gas	Other Big 6	1.49665
40	Midlands	Gas	Other 4	0.77315
41	North East	Electricity	Electricity Incumbent	0.53848
42	North East	Electricity	BG/Centrica	0.96634
43	North East	Electricity	Other Big 6	1.19846
44	North East	Electricity	Other 4	0.54768
45	North East	Gas	BG/Centrica	0.56775
46	North East	Gas	Electricity Incumbent	0.59028
47	North East	Gas	Other Big 6	1.09034
48	North East	Gas	Other 4	0.48489
49	North West	Electricity	Electricity Incumbent	0.83554
50	North West	Electricity	BG/Centrica	1.82084
51	North West	Electricity	Other Big 6	1.36830
52	North West	Electricity	Other 4	0.94474

53	North West	Gas	BG/Centrica	1.09514
54	North West	Gas	Electricity Incumbent	0.91937
55	North West	Gas	Other Big 6	1.23059
56	North West	Gas	Other 4	0.87052
57	North Scotland	Electricity	Electricity Incumbent	0.58316
58	North Scotland	Electricity	BG/Centrica	0.27091
59	North Scotland	Electricity	Other Big 6	0.25641
60	North Scotland	Electricity	Other 4	0.06960
61	North Scotland	Gas	BG/Centrica	0.17102
62	North Scotland	Gas	Electricity Incumbent	0.41611
63	North Scotland	Gas	Other Big 6	0.19100
64	North Scotland	Gas	Other 4	0.05077
65	South Scotland	Electricity	Electricity Incumbent	1.19625
66	South Scotland	Electricity	BG/Centrica	1.30391
67	South Scotland	Electricity	Other Big 6	1.07044
68	South Scotland	Electricity	Other 4	0.41091
69	South Scotland	Gas	BG/Centrica	0.83930
70	South Scotland	Gas	Electricity Incumbent	1.11385
71	South Scotland	Gas	Other Big 6	0.97857
72	South Scotland	Gas	Other 4	0.36985
73	South East	Electricity	Electricity Incumbent	1.02922
74	South East	Electricity	BG/Centrica	1.23910
75	South East	Electricity	Other Big 6	1.50181
76	South East	Electricity	Other 4	0.78991
77	South East	Gas	BG/Centrica	0.86066
78	South East	Gas	Electricity Incumbent	0.98341
79	South East	Gas	Other Big 6	1.35841
80	South East	Gas	Other 4	0.70787
81	Southern	Electricity	Electricity Incumbent	1.65660

82	Southern	Electricity	BG/Centrica	1.50570
83	Southern	Electricity	Other Big 6	1.52173
84	Southern	Electricity	Other 4	1.08087
85	Southern	Gas	BG/Centrica	1.12212
86	Southern	Gas	Electricity Incumbent	1.61018
87	Southern	Gas	Other Big 6	1.34665
88	Southern	Gas	Other 4	0.94295
89	South Wales	Electricity	Electricity Incumbent	0.75009
90	South Wales	Electricity	BG/Centrica	0.49122
91	South Wales	Electricity	Other Big 6	0.47681
92	South Wales	Electricity	Other 4	0.28158
93	South Wales	Gas	BG/Centrica	0.34862
94	South Wales	Gas	Electricity Incumbent	0.95958
95	South Wales	Gas	Other Big 6	0.42398
96	South Wales	Gas	Other 4	0.24934
97	South West	Electricity	Electricity Incumbent	0.72679
98	South West	Electricity	BG/Centrica	0.85427
99	South West	Electricity	Other Big 6	0.96249
100	South West	Electricity	Other 4	0.43766
101	South West	Gas	BG/Centrica	0.52859
102	South West	Gas	Electricity Incumbent	0.44332
103	South West	Gas	Other Big 6	0.78118
104	South West	Gas	Other 4	0.34904
105	Yorkshire	Electricity	Electricity Incumbent	0.78041
106	Yorkshire	Electricity	BG/Centrica	1.68303
107	Yorkshire	Electricity	Other Big 6	1.46895
108	Yorkshire	Electricity	Other 4	0.83795
109	Yorkshire	Gas	BG/Centrica	1.00555
110	Yorkshire	Gas	Electricity Incumbent	0.88545

111	Yorkshire	Gas	Other Big 6	1.34061
112	Yorkshire	Gas	Other 4	0.77043