

Appendix 6.5: Ipsos MORI Tenants Survey – technical report

CMA Tenants omnibus study, Technical Report

Introduction

This study was designed to identify any contractual barriers and aspects of disengagement that may prevent tenants (both private and social) from switching energy supplier.

The survey collected responses from tenants across Great Britain, with the starting sample structured to be representative of the population of adults 15+ in GB.

Data Collection Methodology

The survey was conducted on CAPIbus, Ipsos MORI's weekly face-to-face omnibus survey over two waves of fieldwork.

Interviews took place between 16th October and 9th November 2015 and were conducted in respondents' homes using Computer Aided Personal Interviewing (CAPI) methodology.

Over the course of these two fieldwork waves, 4,007 adults aged 15+ were interviewed across 347 sample points in Great Britain.

Sampling Relevant Tenants

Qualifying sample

Typically, Ipsos MORI's CAPIbus survey interviews just over 700 tenants per week. This is identified using the standard "Tenure" demographic question below.

QTENURE

Which of these applies to your home?

SINGLE CODE

1. It is being bought on a mortgage
2. It is owned outright
3. It is rented from the local authority
4. It is rented from a private landlord
5. It is rented from a Housing Association/Trust
6. Other

Qualifying age groups

Adults aged 15-17 were not asked the CMA survey questions.

Removing tenants on shared ownership and rent-free arrangements

However, in addition to filtering out home owners from the sample, it was also necessary to identify two further groups:

- Those living at an address rent free
- Those who owned the home in a part-ownership arrangement

Either of these two groups could identify themselves as renters, so an extra question was added to filter out these respondents:

EX01

Can I just check, which, if any of the following applies to you?
SP

1. I/we part own/part rent this home on a shared ownership scheme
2. I/we live in this home rent free
3. None of these

The question was asked to **all** respondents to identify the distribution of people in these groups across the existing tenure question and to minimise any impact on weighting for the total sample.

Through the course of the study questionnaire, further sub-groups of tenants were screened out if their answers indicated that they would not be able to answer questions about energy payments.

These included:

- Tenants with live-in landlords
- Tenants who do not have mains gas or electricity
- Tenants who do not, directly or indirectly, pay energy bills

Sample achieved

For all points below, the achieved sample has been outlined in absolute numbers using *unweighted figures* to show the total number of interviews filtered through and the total number remaining in the sample at each stage.

For this reason, the absolute figures quoted may differ somewhat from the absolutes shown in the weighted tables.

Incidence of tenants

Of the 4,007 interviews conducted during the two omnibus waves, 1,255 respondents identified that they were renting, not in a shared ownership arrangement and not living rent free, and were aged 18+.

Of these respondents, 371 rent from a local authority, 220 rent from a housing association or trust and 664 rent privately.

Weighting the sample

All information collected on CAPIbus is weighted to correct for any minor deficiencies or imbalances in the sample achieved.

The data were weighted to the targets derived using the latest set of census data or mid-year estimates and National Readership Survey-defined profiles.

Data were weighted by age, government office region, socio-economic grade, and working status within gender, with additional weights for household tenure (private & HA/LA renters) and ethnicity. Data were weighted to be representative of the population of tenants age 18+ in Great Britain.

In order to match the sample and the weighting targets, the weight scheme was applied to all tenants age 18+ interviewed during the CAPIbus fieldwork, including those who were screened out or did not qualify for the CMA questionnaire.

Combined data from both waves of the CAPIbus were weighted at the end of fieldwork, with a weighting efficiency of 78.1%.

Derived variables in the data

Consideration master

In order to identify what percentage of respondents had considered switching supplier or tariff and what percentage had not, a derived variable was built from JW18, JW12A, JW12B, JW12C, JW19A & JW19B.

There are three important assumptions within this variable:

1. Consideration of switching is implicit within actual switching, even if a respondent had previously stated that they had not *considered* switching.
2. Consideration of switching tariff is implicit within consideration of switching supplier, as, in switching supplier, the deal would change too.
3. Consideration of switching is implicit within asking to switch, where permission is required and the tenant asked to switch

The consideration master was built with three groups:

1. Consider switching supplier (and tariff by implication)
2. Consider switching tariff internally, not supplier
3. Not considered switching either

Respondents were assigned to one of these groups in the data through tracing their responses through the questions, as demonstrated below.

The base for the consideration master was “all answering JW12A” (which asks if respondents have permission to switch) as all questions for identifying switching behaviour were routed from this question.

Definition of consideration master

JW12A

Are they allowed to switch energy supplier(s)?

Answer	Instruction
Yes without permission	Go to JW12B for definition
Yes with permission	Go to JW18 For definition
No	Go to JW18 For definition
DK	Go to JW12B for definition

JW18

Have they asked to switch?

Answer	Instruction
Yes, and landlord agreed	DEFINE AS: “Consider switching supplier (and tariff by implication)”
Yes, and landlord considers	DEFINE AS: “Consider switching supplier (and tariff by implication)”
Yes, denied	DEFINE AS: “Consider switching supplier (and tariff by implication)”
No	Go to JW12C for definition
DK	Go to JW12C for definition

JW12B



Have they considered switching supplier?

Answer	Instruction
Yes	DEFINE AS: "Consider switching supplier (and tariff by implication)"
No	Go to JW19A for definition
DK	Go to JW12C for definition

JW12C

Have they actually switched supplier?

Answer	Instruction
Yes	DEFINE AS: "Consider switching supplier (and tariff by implication)"
No	Go to JW19A for definition
DK	Go to JW19A for definition

JW19A

Consideration of tariff switching

Answer	Instruction
Yes	DEFINE AS: "Consider switching tariff internally, not supplier"
No	DEFINE AS: "Not consider switching either"
DK	Go to JW19B for definition

JW19B

Actual switching of tariff

Answer	Instruction
Yes	DEFINE AS: "Consider switching tariff internally, not supplier"
No	DEFINE AS: "Not consider switching either"
DK	Exclude from matrix groups, but include in base

Therefore the consideration master is defined as follows:

Base = All answering JW12A

Group	Definition
"Consider switching supplier (and tariff by implication)"	JW18A = 1,2, 3 OR JW12B = 1 OR JW12C = 1
"Consider switching tariff internally, not supplier"	((JW18A = NOT 1,2, 3) AND (JW12B =NOT 1) AND (JW12C = NOT 1)) AND (JW19A = 1 OR JW19B = 1)
"Not consider switching either"	((JW18A = NOT 1,2, 3) AND (JW12B =NOT 1) AND ((JW12C = NOT 1) AND (JW19A = NOT 1 OR JW19B = NOT 1)) AND (JW19A = 2 OR JW19 B = 2)
No value in downbreaks if:	((JW18A = NOT 1,2, 3) AND (JW12B =NOT 1) AND ((JW12C = NOT 1) AND (JW19A = NOT 1 OR JW19B = NOT 1))

Respondents who answered "DK" at JW19B and had not otherwise been assigned were considered unable to answer and were removed from the consideration master tables. This applied to roughly 4% of those respondents answering JW12A.

Switching master

In order to identify what percentage of respondents had actually switched supplier or tariff and what percentage had not, a derived variable was built from JW12C, JW19A & JW19B

In deriving this definition, switching of tariff is implicit in switching supplier, as, in switching supplier, the deal would change too.

The consideration master was built with three groups:

1. Switched supplier (and tariff by implication)
2. Have switched tariff internally, not supplier
3. Not switched either

Respondents were assigned to one of these groups in the data through tracing their responses through the questions, as demonstrated below.

Definition of switching master

JW12A

Are they allowed to switch energy supplier(s)?

Answer	Instruction
Yes, without permission	Go to JW12B for definition
Yes, with permission	Go to JW18 For definition
No	Go to JW18 For definition
DK	Go to JW12B for definition

JW18

Have they asked to switch?

Answer	Instruction
Yes, and landlord agreed	Go to JW12C for definition
Yes, and landlord considers	Go to JW12C for definition
Yes, denied	Go to JW12C for definition
No	Go to JW12C for definition
DK	Go to JW12C for definition

JW12B

Actual consideration of switching

Answer	Instruction
Yes	Go to JW12C for definition
No	Go to JW19A for definition
DK	Go to JW12C for definition

JW12C

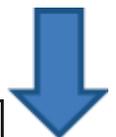
Actual switching

Answer	Instruction
Yes	DEFINE AS: "Switched supplier (and tariff by implication)"
No	Go to JW19A for definition
DK	Go to JW19A for definition

JW19A

Consideration of tariff switching

Answer	Instruction
Yes	Go to JW19B for definition



No	DEFINE AS: "Not switched either"
DK	Go to JW19B for definition

JW19B

Actual switching of tariff

Answer	Instruction
Yes	DEFINE AS: "Have switched tariff internally, not supplier"
No	DEFINE AS: "Not switched either"
DK	Exclude from matrix groups, but include in base



Therefore the switching master is defined as follows:

Base = All answering JW12A

Group	Definition
"Switched supplier (and tariff by implication)"	JW12C = 1
"Have switched tariff internally, not supplier"	(JW12C = NOT 1) AND (JW19B = 1)
"Not switched either"	((JW12C = NOT 1) AND (JW19B = NOT 1)) AND ((JW19A = 2 OR JW19B = 2)
No Value in downbreaks if:	(JW12B = NOT 1) AND ((JW12C = NOT 1) AND (JW19A = NOT 2 OR JW19B = NOT 2)) AND (JW19B = DK)

Respondents who answered "DK" at JW19B and had not otherwise been assigned were considered unable to answer and were removed from the switching master tables. This applied to roughly 4% of those respondents answering JW12A.

Meter type for gas, electric or both

For sub-group analysis, we identified three key groups of respondents according to their meter types, assigned in the following order of precedence:

- Respondents with a pre-payment meter(s)
- Respondents with a smart meter(s)
- Respondents with any other type of meter(s)

This was defined across both gas and electric meters and accounted for multi-coding.

If a respondent qualified as a pre-payment and smart meter respondent (for example, by having a smart electric meter and a pre-payment gas meter), they were assigned as a "pre-payment" respondent. Respondents who identified a teleswitch meter and/or an Economy 10 meter would have been included in the top group alongside pre-payment meters; however, no respondents identified either of these as meter types they had in their home.

As a result, these groups do not overlap for sub-group analysis.