



Department for
Business, Energy
& Industrial Strategy

BEIS PUBLIC ATTITUDES TRACKER

Wave 26

Questions on Renewable Energy, Shale Gas, Clean
Growth and Consumer Markets



August 2018

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Glossary

- **Base size:** The number of people answering a survey question.
- **Cognitive testing:** An in-depth interviewing method to determine the reliability and validity of survey questions.
- **Consumer dispute resolution services:** Independent organisations which help people resolve a consumer dispute, such as an ombudsman.
- **Omnibus survey:** A method of quantitative survey research where data on a wide variety of subjects is collected during the same interview.
- **Privacy notices:** Information provided by a service provider to inform users how they will use their personal information.
- **Quotas:** A target number of interviews for a certain characteristic during survey fieldwork (e.g. age).
- **Random location quota sampling:** A form of quota sampling that combines elements of random sampling and quota sampling. Once a random sample is drawn, interviewers are tasked with interviewing a range of sub-groups across different timing patterns based on pre-agreed quotas.
- **Sample size:** The number of people included in the sample (a subset of the population).
- **Shale gas and fracking:** Shale gas is natural gas found in shale, a non-porous rock which does not allow the gas to escape. Hydraulic fracturing or “fracking” is a process of pumping water at high pressure into shale to create narrow fractures which allow the gas to be released and captured. The gas can then be used for electricity and heating.
- **Shopping around:** Comparing different products, services, deals or providers.
- **Social grade:** Social grade is a classification system based on occupation. It contains the following categories:
 - **A:** Higher managerial, administrative and professional
 - **B:** Intermediate managerial, administrative and professional
 - **C1:** Supervisory, clerical and junior managerial, administrative and professional
 - **C2:** Skilled manual workers
 - **D:** Semi-skilled and unskilled manual workers
 - **E:** State pensioners, casual and lowest grade workers, unemployed with state benefits only
- **Statistical significance:** A statistical test to determine whether relationships observed between two survey variables exist in the population from which the sample is drawn.
- **Survey outputs:** The key deliverables from the survey. This includes excel summary tables, excel dataset and PDF data tables.
- **Switching:** Changing provider or contract for products or services.

- **Terms and conditions:** The rules a consumer must abide by to use a service or purchase a product.
- **Weighting:** An adjustment made to the data to ensure that survey results are representative of the target population (in this case, all UK adults).

Introduction

The Public Attitudes Tracker (PAT) survey covers public attitudes towards BEIS policies such as energy, climate change, employment and consumer rights. The survey began in March 2012 and runs four times a year. Questions on issues where we think attitudes might shift quickly or be affected by seasonal changes are repeated quarterly; other questions are asked annually. The tracker is regularly reviewed to ensure that the dataset continues to offer valuable insight.

This report presents summary headline findings from July 2018 (Wave 26).

Ahead of wave 26, BEIS undertook a review the survey, to understand how the survey could meet BEIS's priorities and reflect the broader area covered under the department's remit. The review covered:

- The survey topic areas
- The frequency of the survey
- The sample size
- Surveys outputs

Changes were made to wave 26, following this review. The sample size has increased from c. 2,000 to c. 4,000 to allow greater scope for regional analysis and changes have been made to the questionnaire. Previously, the PAT consisted of one annual survey every March and three shorter surveys, in June, September and December. The survey now consists of quarterly waves of similar length, and new topics have been introduced to reflect BEIS's full remit.

The twenty-sixth wave of data was collected between 11 July to 17 July using face-to-face in-home interviews with a representative sample of 4,268 households in the UK. Data was collected using the Kantar TNS Omnibus, which uses a random location quota sampling method.

The questionnaire was designed by BEIS and Kantar Public drawing on several questions from previous surveys. Questions were refined through cognitive testing. Full details of the methodology are provided in the technical note.

Two pre-existing survey topics were included at wave 26: renewable energy and shale gas. The remainder of the questionnaire comprised topics that were included in the survey for the first time. These were:

- Clean Growth
- Shopping around

- Switching products and services
- Consumer rights
- Consumer dispute resolution services
- Consumer problems
- Trust in consumer organisations

Summary of headline findings

Questions on energy

Renewable energy

In July 2018, 82% of the public expressed support for the use of renewable energy, a slight decrease from the peak of 85% in March 2018), but an increase from 77% at this stage last year (wave 22, June 2017). Opposition to renewable energy remained very low, at 4%, with only 1% strongly opposed.

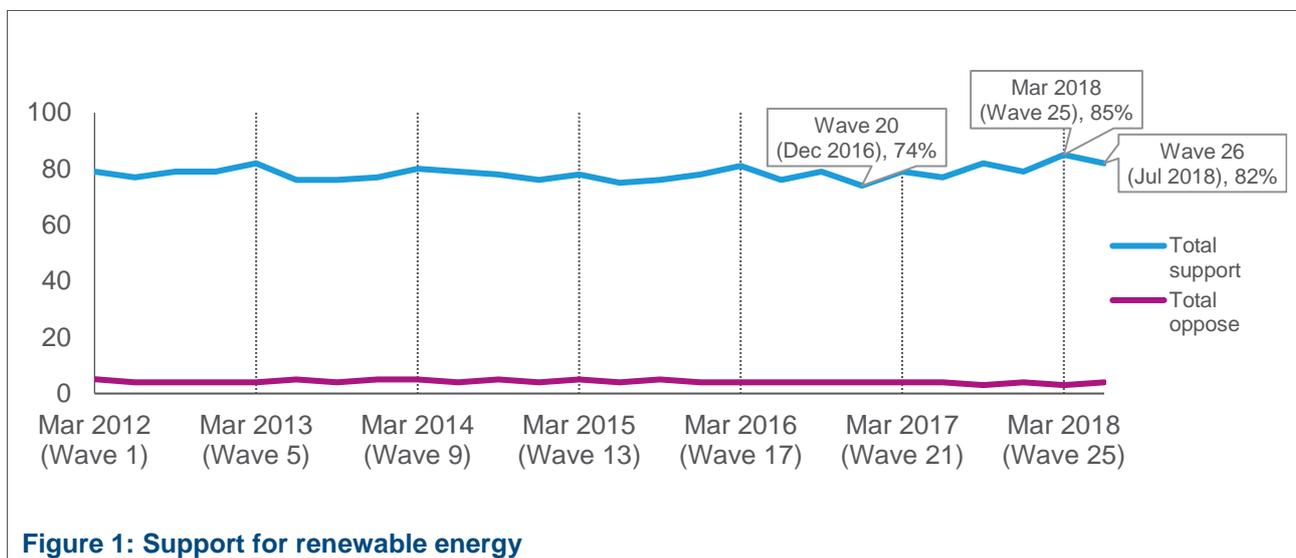


Figure 1: Support for renewable energy

Q3. The next question is about renewable energy. This covers a number of different forms, including wind power, solar energy and biomass. Do you support or oppose the use of renewable energy for providing our electricity, fuel and heat?

Bases: All wave respondents - March 2012 (2,121); June 2012 (2,100); September 2012 (2,118); December 2012 (2,107); March 2013 (2,051); July 2013 (2,024); September 2013 (2,103); December 2013 (2,110); March 2014 (2,040); June 2014 (2,087); September 2014 (2,103); December 2014 (2,119); March 2015 (1,981); June 2015 (2,118); September 2015 (2,121); December 2015 (2,121); March 2016 (2,105); June 2016 (2,114); September 2016 (2,080); December 2016 (2,138); March 2017 (2,180); June 2017 (2,097); September 2017 (2,105); December 2017 (2,078); March 2018 (2,102); July 2018 (4,268)

Fieldwork dates: March 2012 to July 2018

Support for renewables was particularly high for those living in Northern Ireland (93%), those in higher social grades (90% ABs versus 71% of DEs), and those with household incomes over £35,000 (90% for household incomes between £35,000 and £49,999, and 93% for those over £50,000, compared with 74% of those with household incomes below £16,000).

Shale gas

Eight in ten people were aware of fracking (78%) in July 2018. Awareness of fracking has remained between 70% and 80% over the last four years of the tracker, following an increase between June 2012 (42%) and December 2013 (70%).

Despite these high levels of awareness, only a small proportion claimed to know a lot about fracking (14%). Just under half (46%) claimed they knew a little about fracking, and two in ten (18%) were aware of fracking but did not really know what it was. These findings are similar to the results in June 2017.

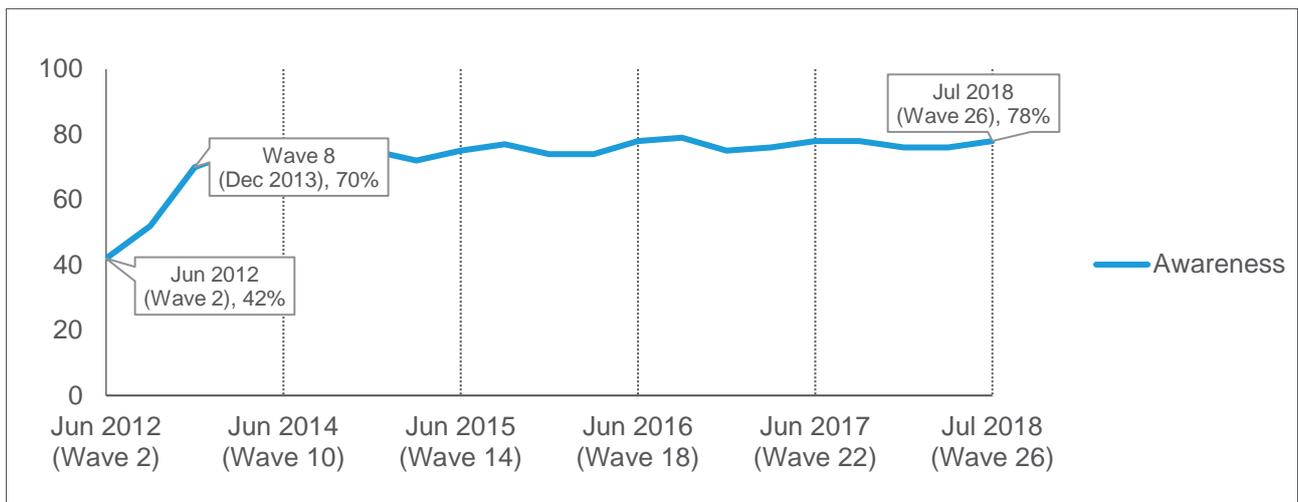


Figure 2: Awareness of hydraulic fracturing for shale gas

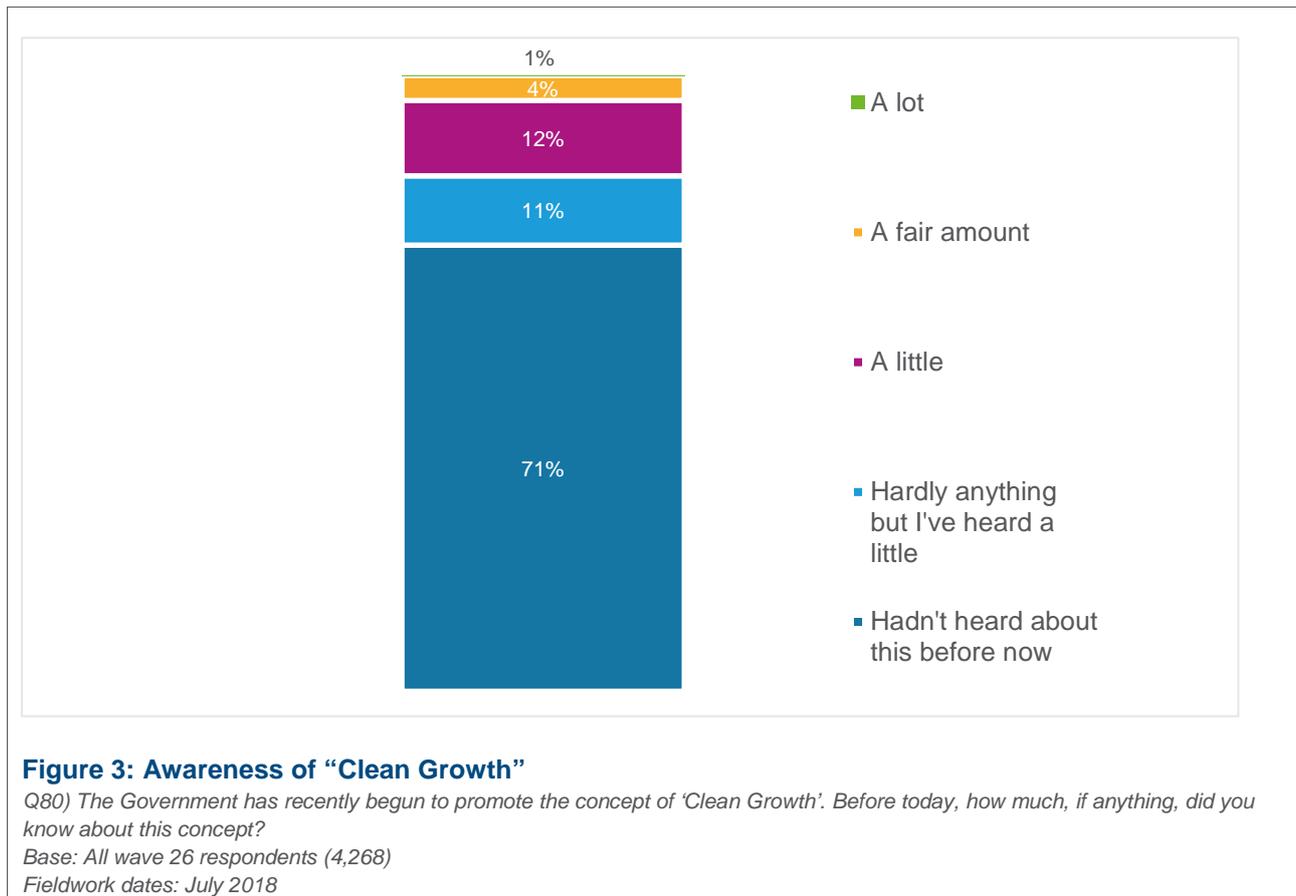
Q15a) Before today, how much, if anything did you know about hydraulic fracturing for shale gas, otherwise known as 'fracking'?
 Bases: All wave respondents - (2,087); September 2014 (2,103); December 2014 (2,119); March 2015 (1,981); June 2015 (2,118); September 2015 (2,121); December 2015 (2,121); March 2016 (2,105); June 2016, (2,114); September 2016 (2,080); December 2016 (2,138); March 2017 (2,180); June 2017 (2,097); September 2017 (2,105); December 2017 (2,078); March 2018 (2,102); July 2018 (4,268)
 Fieldwork dates: June 2012 to July 2018

Awareness of fracking was higher amongst those aged 55-64 (91%), those in social grade AB (90%), those living in Northern Ireland (88%), and those with household incomes between £25,000 and £34,999 (88%).

Clean Growth

The Government has recently begun to promote the concept of “Clean Growth”. A question was introduced at wave 26 to understand the public’s knowledge of this concept.

The public’s awareness of “Clean Growth” as a concept is low. Seven in ten people (71%) had not heard of “Clean Growth”, while five per cent said they knew a lot or a fair amount (1% and 4% respectively).



Men were more likely than women (7% vs. 4%) to claim higher levels of knowledge (a lot or a fair amount), as were those in the highest social grades (8% of ABs vs. 4% of C2DEs).

Questions on consumer markets

Shopping around

New questions were introduced at wave 26 to provide information on shopping around for products and services.

The public were asked if they had taken out a range of different products and services in the last 12 months. The most common product taken out was car insurance (37%), and the least likely product to be taken out was Pay TV (4%).

A quarter of the public (23%) had taken out three or more products and services in the last 12 months, whilst a third (35%) said they had not taken out any of these products or services.

The public were also asked if they had personally shopped around for the same range of products and services in the last 12 months. They were most likely to shop around for car insurance (34%), followed by home insurance (20%), energy (19%) and a mobile phone contract (19%). They were least likely to shop around for a bundled contract combining two or more services (4%), a mortgage (4%), a current account (3%) or pay TV (3%).

Two in ten people (17%) had shopped around for three or more products and services in the last 12 months, whilst four in ten (41%) had not shopped around for products and services. Groups more likely to have shopped around for three or more products included¹:

- Men (20%, versus 13% of women)
- Age groups between 25-34 and 55-64 (between 18% and 23%), compared with 8% of 16 to 24 year olds and 8% of people aged 65 or over
- People in social grades AB (29%), compared with 18% of C1s, 15% of C2s and 4% of DEs
- Owner occupiers (20%, versus 14% of private renters and 6% of social renters)
- People with household incomes between £35,000 and £49,999 (30%) and £50,000 or over (40%), compared with 9% of those with household incomes below £16,000 17% between £16,000 and £24,999 and 20% between £25,000 and £34,999

¹ There is a similar pattern for those who have taken out products and services.

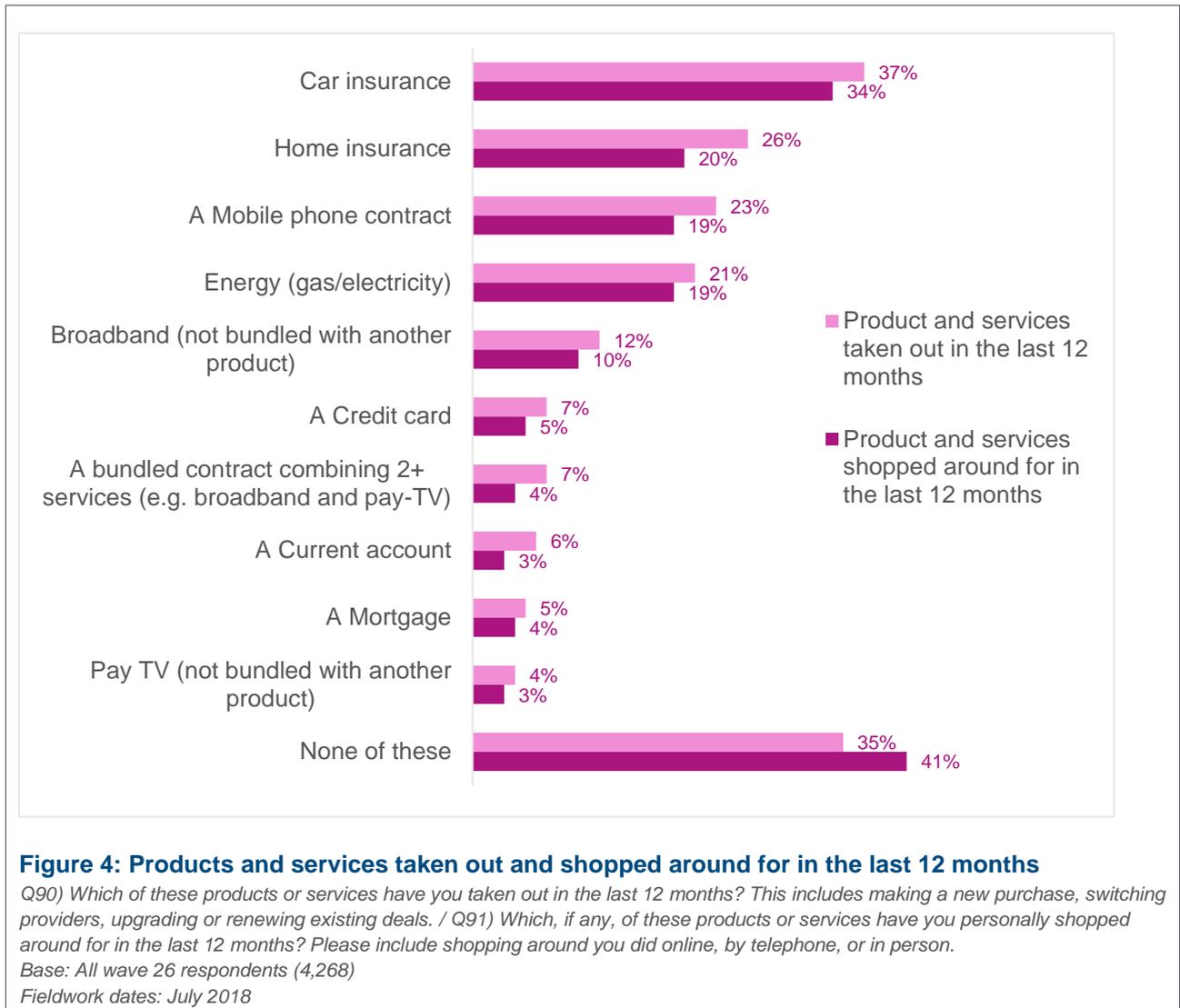
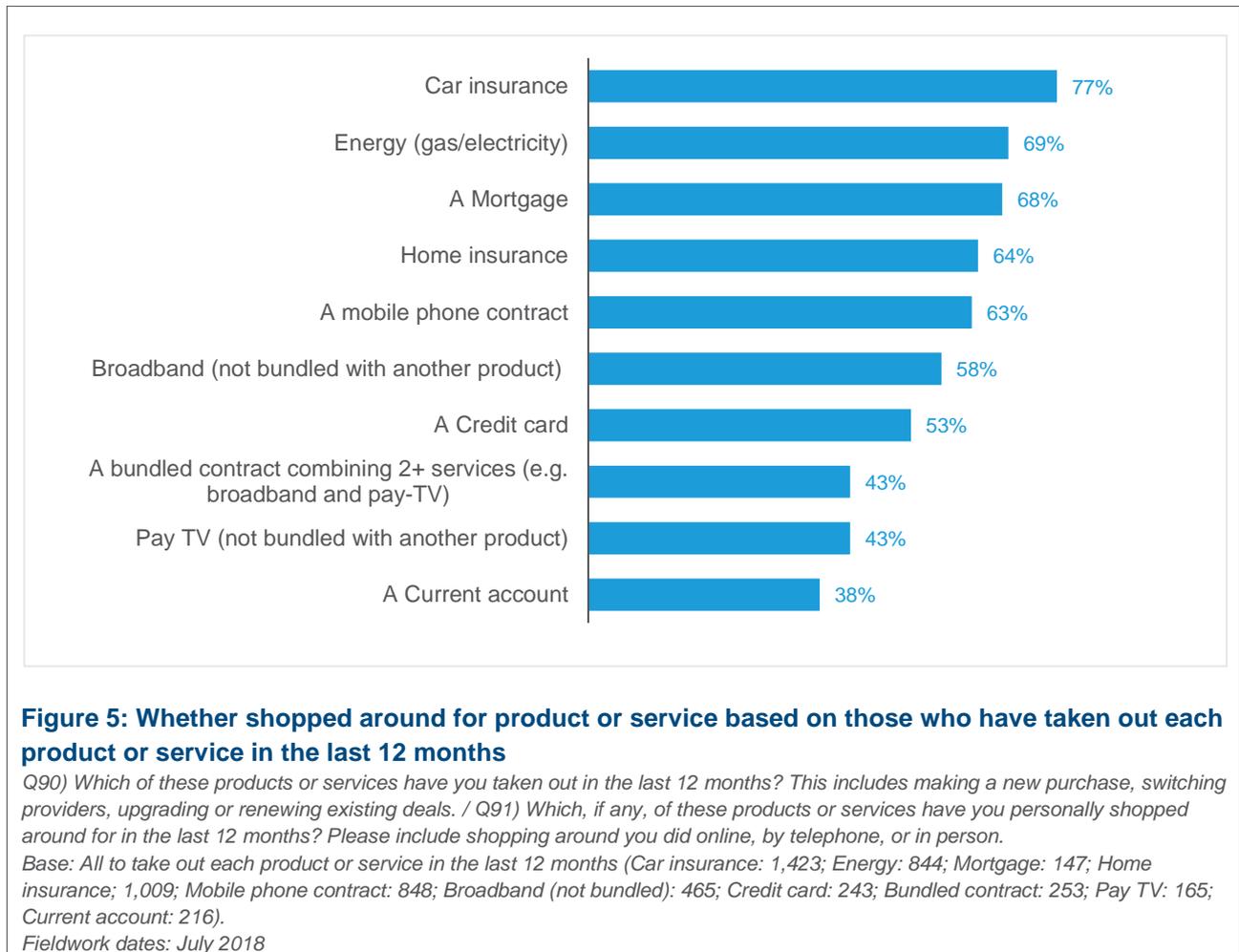


Figure 4 shows there is a strong relationship between taking out products and services and shopping around. This is unsurprising; those products and services taken out more frequently will naturally be those that the public shop around for more frequently.

To provide an indication of the propensity for the public to shop around when making different purchases, Figure 5 shows the proportion to shop around for each product or service based only on those who have taken out this product and service in the last 12 months. This shows that shopping around for products taken out in the last year was most common for car insurance, energy and mortgages, and least common for bundled contracts, pay TV and current accounts.

There are some notable differences in the proportions of people to shop around for different products and services based on Figures 4 and 5. These largely relate to how frequently products or services are taken out. For example, only four per cent of people had shopped around for mortgages in the last 12 months (Figure 4), suggesting that this is a rare activity. However, Figure 5 shows that 68% of people who had taken out a

mortgage in the last 12 months had shopped around for one. This shows that while taking out mortgages is a much rarer activity than some other products or services, when they are taken out most people do shop around.



How people shop around

Respondents mainly shopped around by using online price comparison websites or apps, by visiting websites of individual providers or suppliers and by using consumer websites such as Which? and Moneysavingexpert.com. Online comparison sites or apps were most commonly used when shopping around for car insurance, energy, home insurance and credit cards.

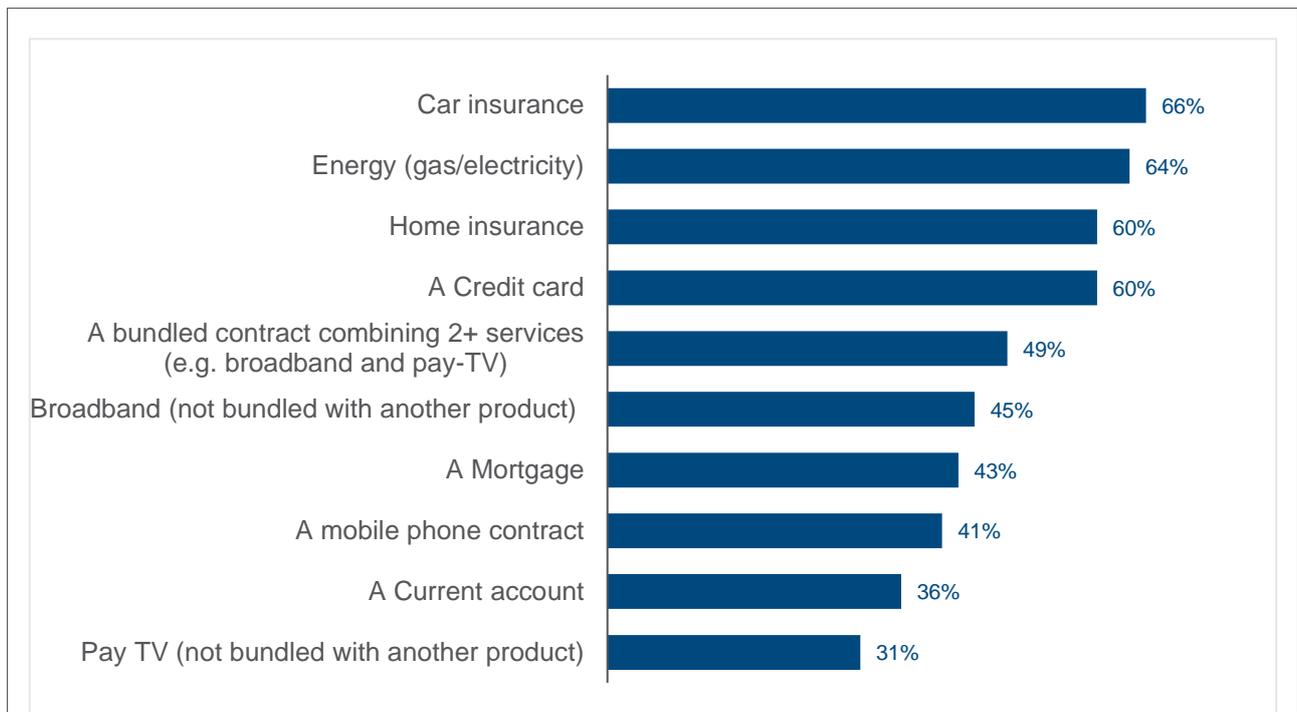


Figure 6: Whether use price comparison site to shop around by product or service shopped around for in last 12 months

Q92) Please think about the last time you shopped around for [PRODUCT] in the last 12 months. In which ways did you shop around for [PRODUCT]?

Base: All to take out each product or service in the last 12 months (Car insurance: 1,253; Energy: 732; Home insurance: 743; Credit cards: 180; Bundled contract: 147; Broadband (not bundled): 353; Mortgage: 129; Mobile phone contract: 669; Current account: 118; Pay TV: 97).

Fieldwork dates: July 2018

Why people don't shop around

The main reasons why people did not shop around, despite taking products or services out, were because:

- The offer from the provider was just what they wanted (ranging from 11% for a current account to 30% for car insurance).
- They felt loyalty to their provider or had an established relationship with them (ranging from 9% for pay TV to 33% for a current account).
- It took too much time or effort (ranging from 8% for credit cards to 19% for Pay TV).

Switching

At wave 26, the public were asked questions on switching providers or contracts for different products or services in the last 12 months.

People were most likely to switch provider or contract for car insurance, energy or a mobile phone contract. Four in ten had switched at least one product or service in the last 12 months, and six per cent of respondents had switched at least three. Almost six in ten respondents had not switched providers or contracts for any products or services in the last 12 months.

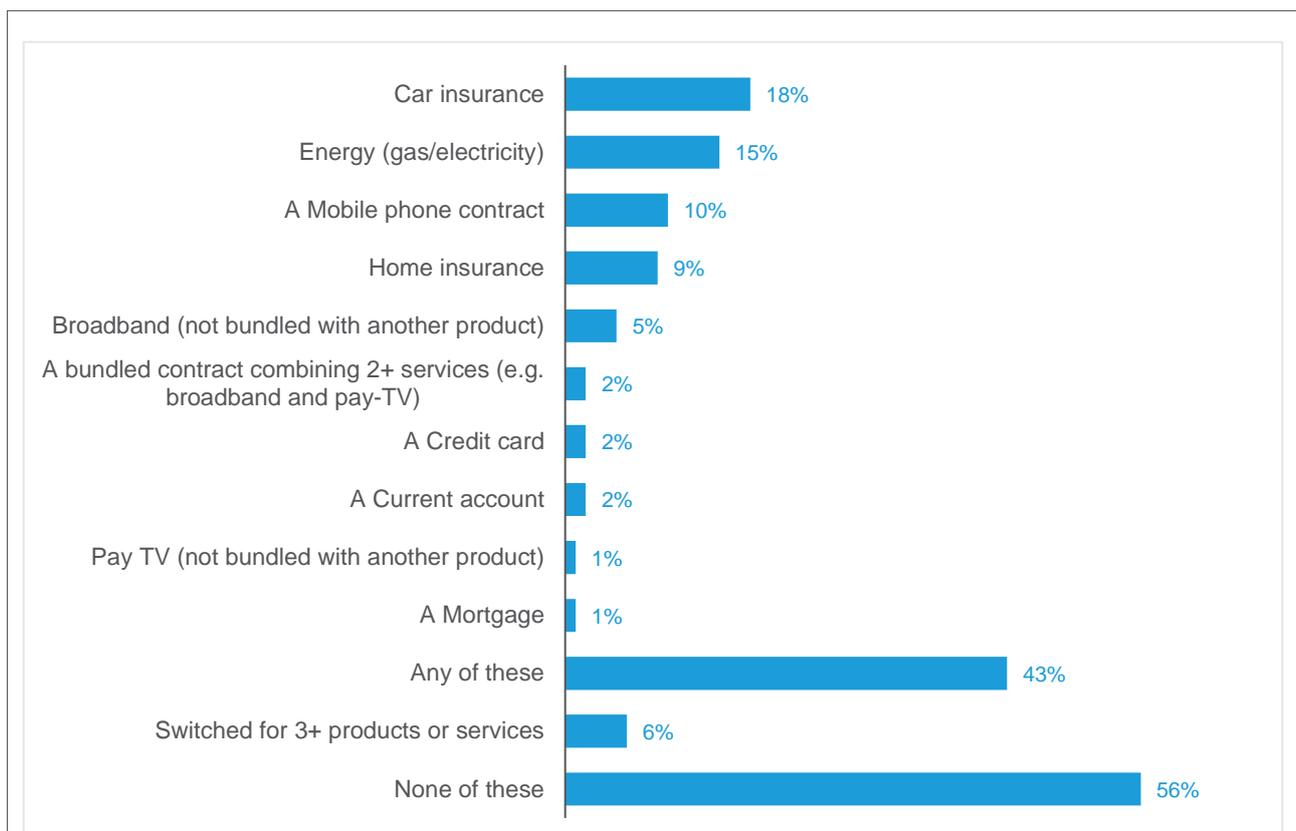


Figure 7: Whether switched provider or contract for products or services in the last 12 months

Q94) In the last 12 months, that is since [MONTH YEAR], have you switched provider or contract for any of these products or services?

Base: All wave 26 respondents (4,268)

Fieldwork dates: July 2018

People with higher household incomes were more likely to have switched a product or service, and to have switched three or more products and services, than those on lower incomes. This contrast was particularly apparent for car insurance, home insurance and energy.

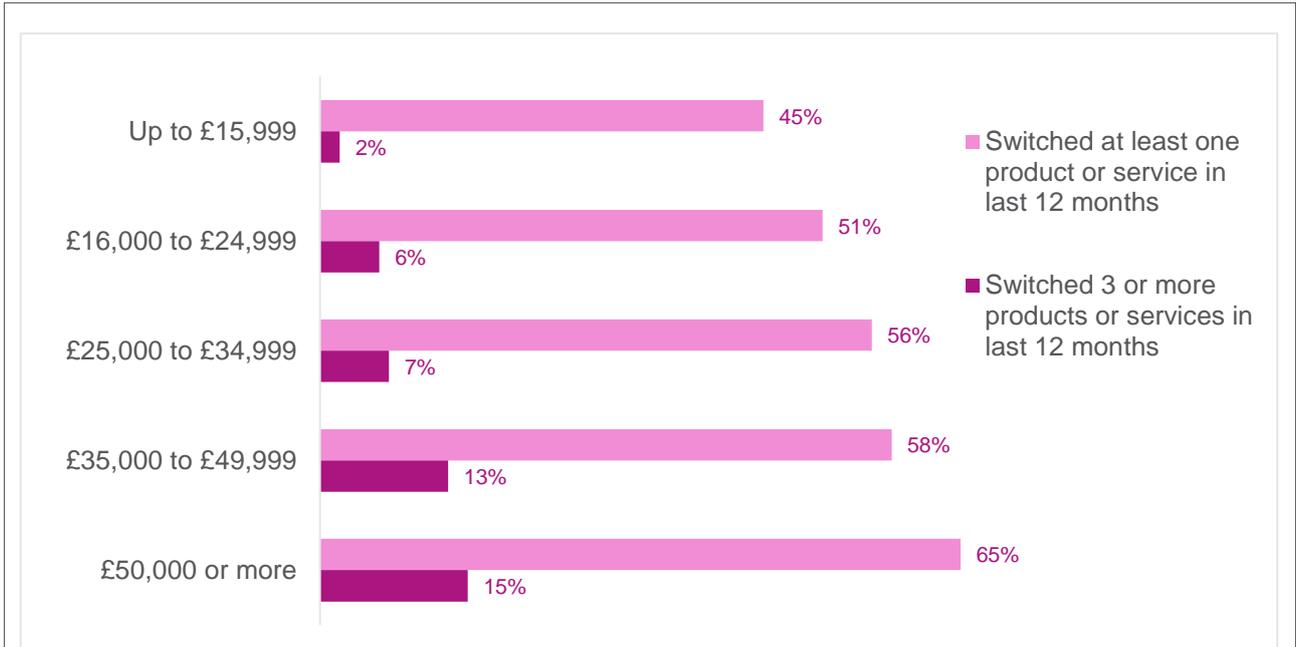


Figure 8: Switching rate for any products and services and 3+ products and services by household income

Q94) In the last 12 months, that is since [MONTH YEAR], have you switched provider or contract for any of these products or services?

Base: All wave 26 respondents with household incomes up to £15,999 (770), £16,000 to £24,999 (450); £25,000 to £34,999 (410); £35,000 to £49,999 (365) and £50,000 or more (226).

Fieldwork dates: July 2018

Reasons for not switching

The main reason why people did not switch providers or contracts in the last 12 months was because they were happy with their current provider or contract. This ranged from 72% to 89% across all products or services.

Ease of switching

People who had switched provider or contract for a product or service in the last 12 were months were asked:

- How easy or difficult it was to exit the previous contract
- How easy or difficult it was to find a new provider or contract
- Whether they experienced any problems during the switching process once a new provider or contract was selected

People generally found it easy to exit their previous contract across all product or services; the proportion reporting this to be very or fairly easy ranged from 82% to 96%. They were most likely to say that it was very easy to switch contract and provider for home insurance and car insurance and least likely to say it was very easy to switch a pay TV contract.

There were also high levels of reported ease (either very or fairly) for finding a new provider or contract, ranging from 88% to 99%. People found it easiest to provide a new contract or provider for car insurance, credit cards, energy, home insurance and current accounts. They were least likely to say it was very easy to find a new broadband provider.

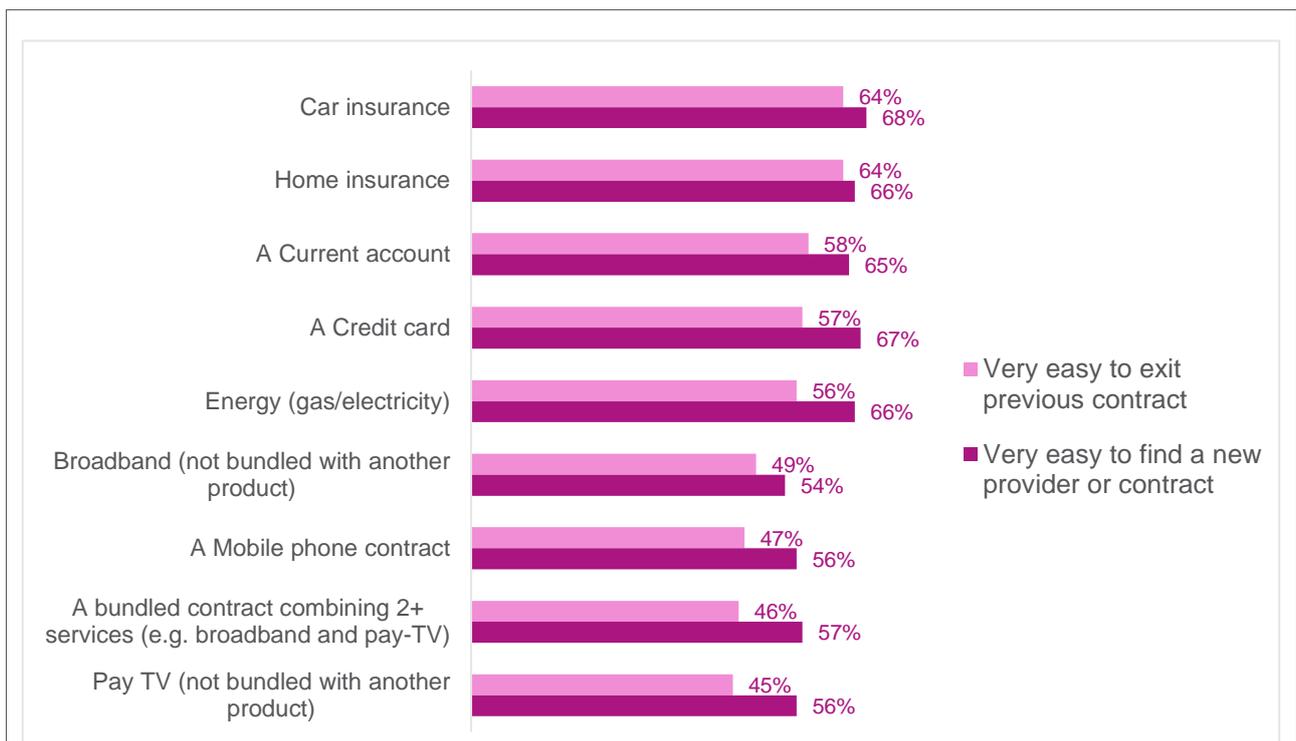


Figure 9: Proportion saying it was ‘very easy’ to exit a previous contract and to find new provider or contract

Q97) How easy or difficult did you find it to exit the previous contract? / Q98) How easy or difficult was it for you to find a new provider or contract?

Base: Wave 26 respondents to switch provider or contract for each product or service in the last 12 months (Car insurance: 672; Home insurance: 353; Current account: 65; Credit card: 74; Energy: 606; Broadband (not bundled): 194; Mobile phone provider: 355; Bundled contract: 84; Pay TV: 58). Mortgages not included due to small base size (38).

Fieldwork dates: July 2018

People rarely experienced problems during the switching process once they selected a new provider or contract. Where they did, problems were more common when switching to a bundled contract combining two or more services, broadband or energy than other products and services. Very few people experienced problems when switching credit cards or home insurance.

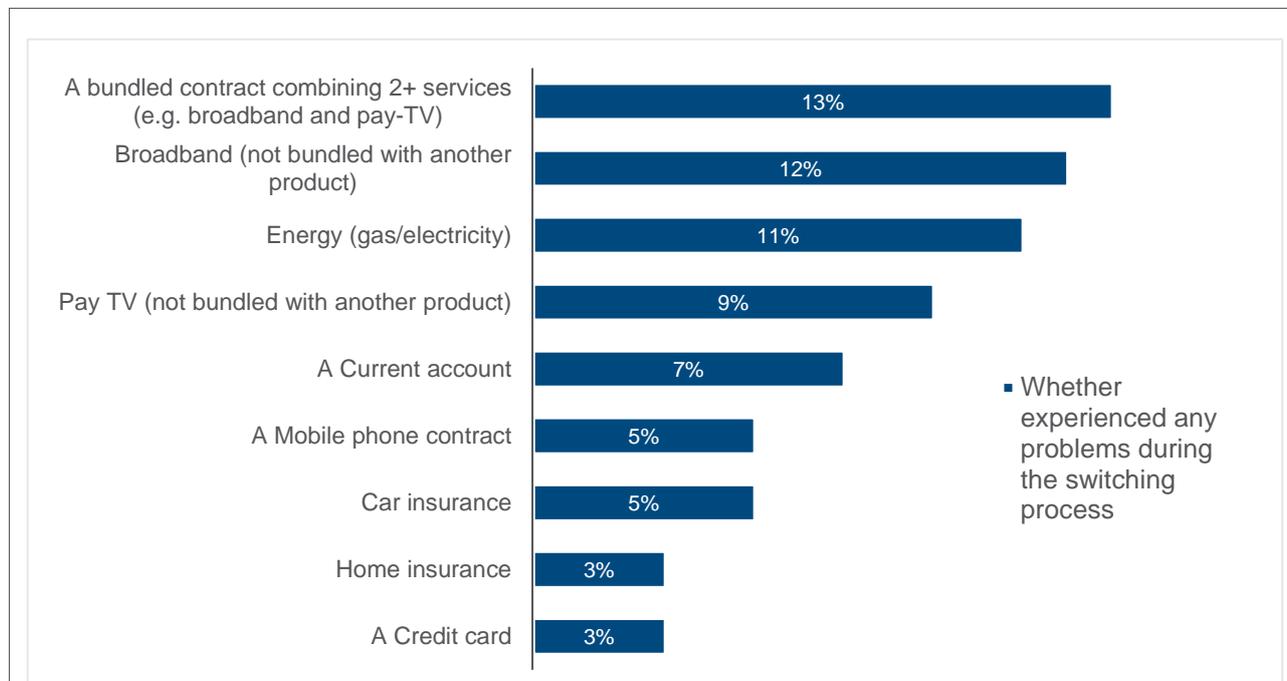


Figure 10: Whether experienced any problems during the switching process once a new provider or contract was selected

Q99) Did you experience any problems during the switching process once you selected a new provider or contract?
 Base: Wave 26 respondents to switch provider or contract for each product or service in the last 12 months (Car insurance: 672; Home insurance: 353; Current account: 65; Credit card: 74; Energy: 606; Broadband (not bundled): 194; Mobile phone provider: 355; Bundled contract: 84; Pay TV: 58). Mortgages not included due to small base size (38).
 Fieldwork dates: July 2018

Consumer rights

New questions on consumer rights were introduced at wave 26 to capture public awareness and understanding of them.

Use of websites and online services

The public were first asked if they had purchased anything from two different types of websites in the last 12 months:

- A website with multiple sellers (e.g. Amazon, eBay, Gumtree, Etsy)
- A single retailer website (e.g. a high street retailer website)

Two thirds (67%) had purchased from a website with multiple sellers, and half (48%) had purchased from a single retailer website. A quarter (24%) had not purchased from either of these types of website in the last 12 months.

There were some notable differences between demographic groups in their likelihood to purchase from these websites. Those aged under 55 were more likely than older people to purchase from both multiple and single retailer websites. People aged between 25 and 44 were particularly likely to have purchased from a multiple retailer website.

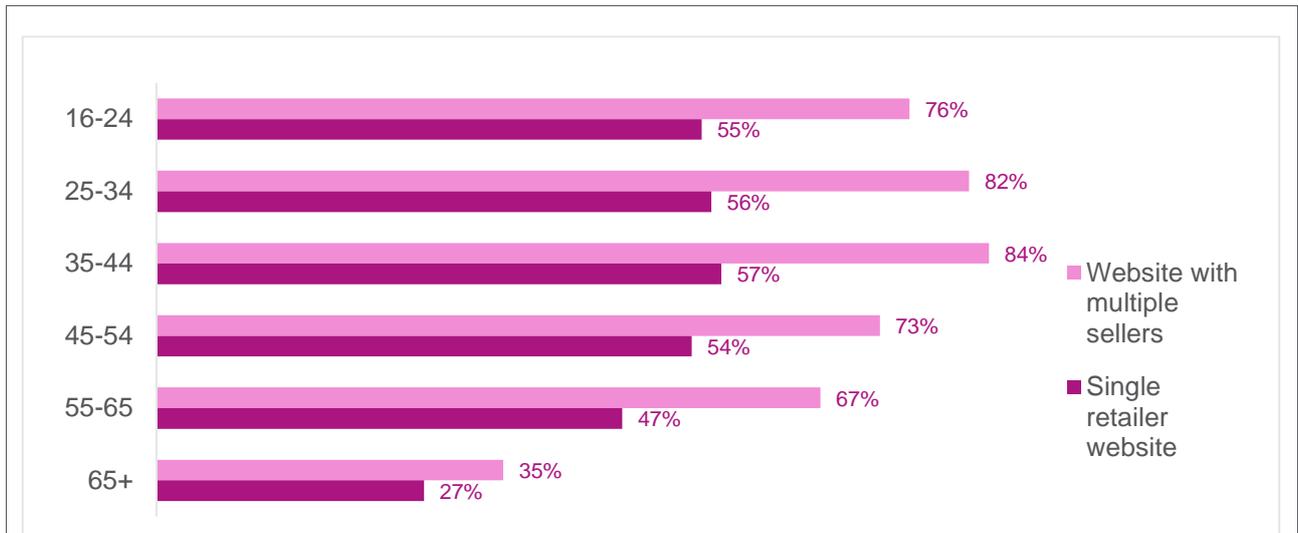


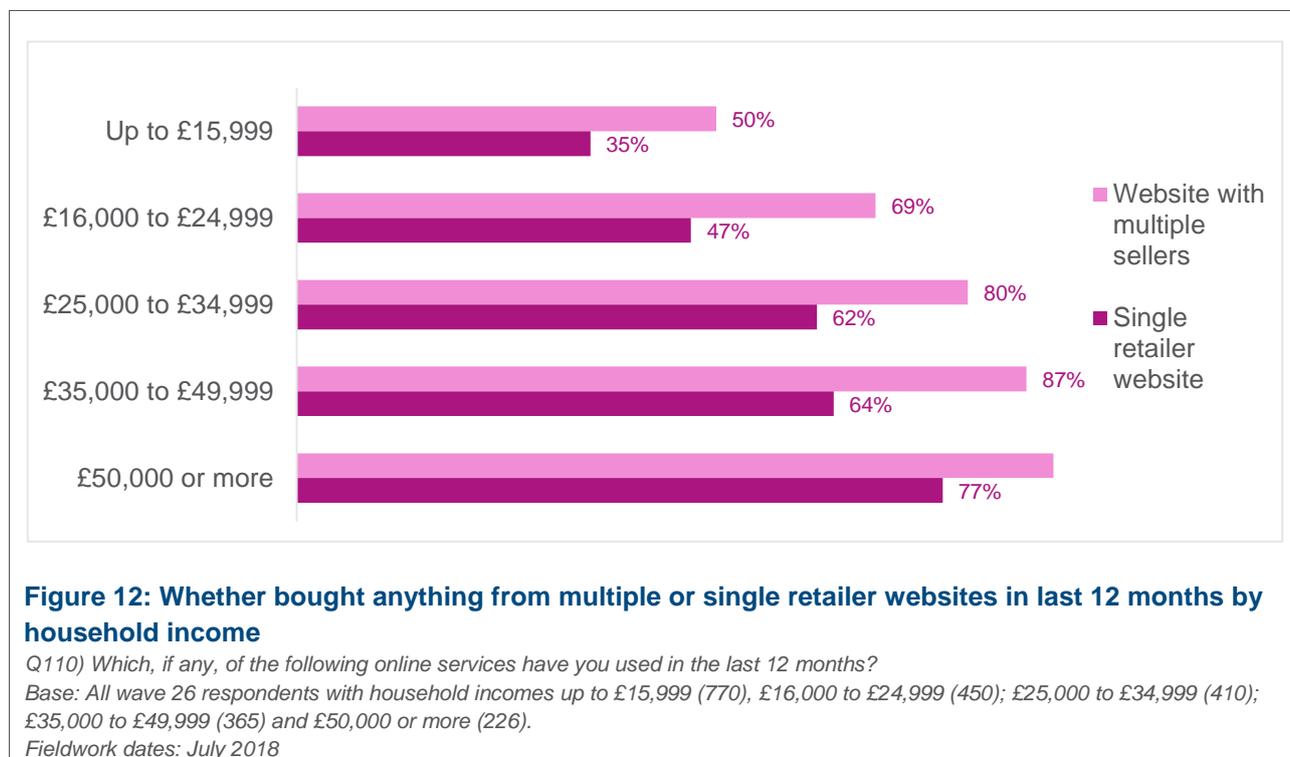
Figure 11: Whether bought anything from multiple or single retailer websites in last 12 months by age

Q110) Which, if any, of the following online services have you used in the last 12 months?

Base: All wave 26 respondents aged 16-24 (466); 25-34 (650); 35-44 (551); 45-54 (584); 55-64 (557); 65+ (1,460).

Fieldwork dates: July 2018

Those with higher household incomes were more likely to purchase from both types of website.



People living in the East of England (82%), London (81%) and the South East (79%) were more likely to have purchased from either of these types of website compared with those living in other parts of the UK.

The public were then asked whether they had used a range of online services over the last 12 months:

- Social media (e.g. Facebook, Twitter, Instagram)
- Streaming services (e.g. Netflix, Spotify)
- Renting a service from another individual (e.g. Airbnb, Uber)

Social media was the most used service, followed by streaming and renting services. Fourteen per cent of people had used all three online services in the last 12 months, while three in ten (27%) had not used any of these services.

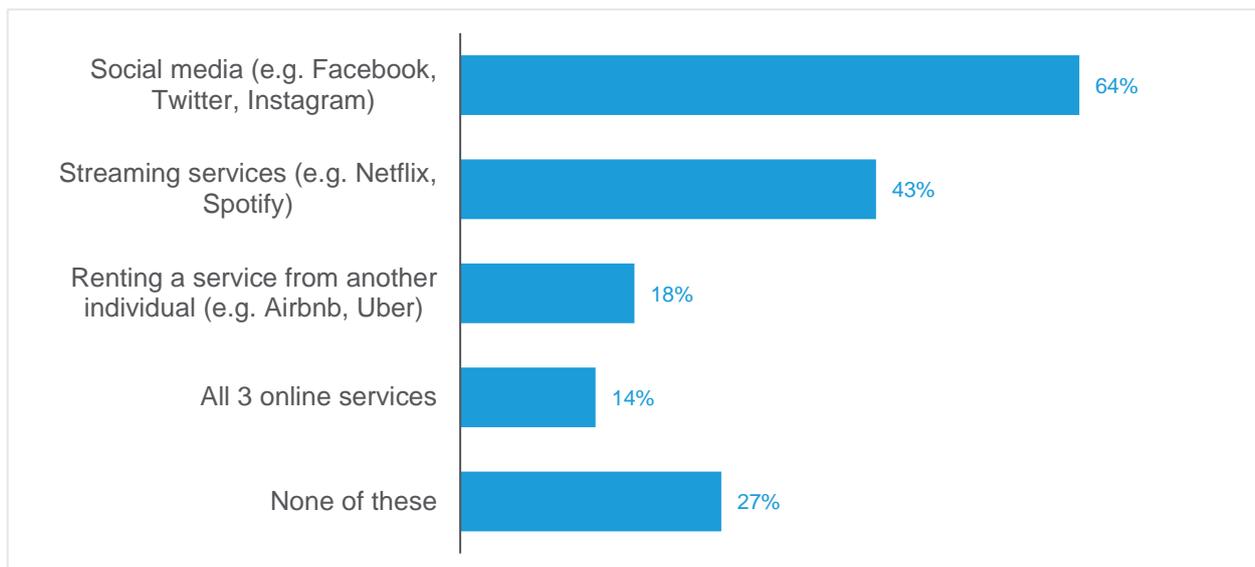


Figure 13: Online services used in last 12 months

Q111) Which, if any, of the following online services have you used in the last 12 months?
 Base: All wave 26 respondents (4,268)
 Fieldwork dates: July 2018

There were clear age differences in use of these online services. For all three online services, levels of use were highest in the youngest age group and dropped gradually as age increased. Those with higher household incomes were also more likely to use all three of the online services than those with lower household incomes.

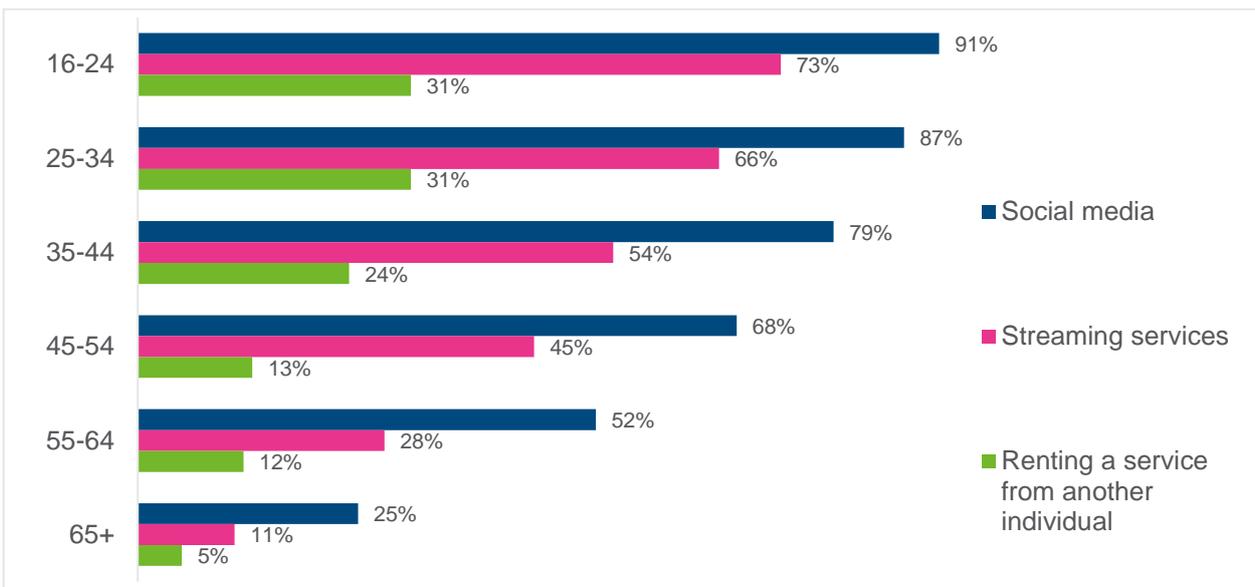


Figure 14: Online services used in last 12 months by age

Q111) Which, if any, of the following online services have you used in the last 12 months?
 Base: All wave 26 respondents aged 16-24 (466); 25-34 (650); 35-44 (551); 45-54 (584); 55-64 (557); 65+ (1,460).
 Fieldwork dates: July 2018

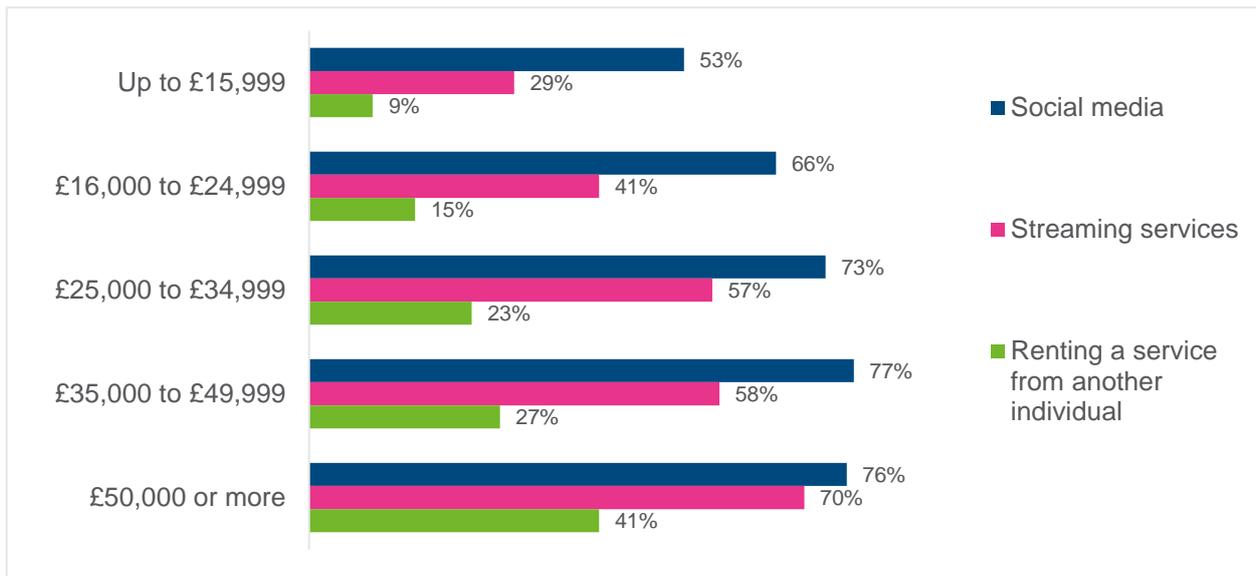


Figure 15: Online services used in last 12 months by household income

Q111) Which, if any, of the following online services have you used in the last 12 months?

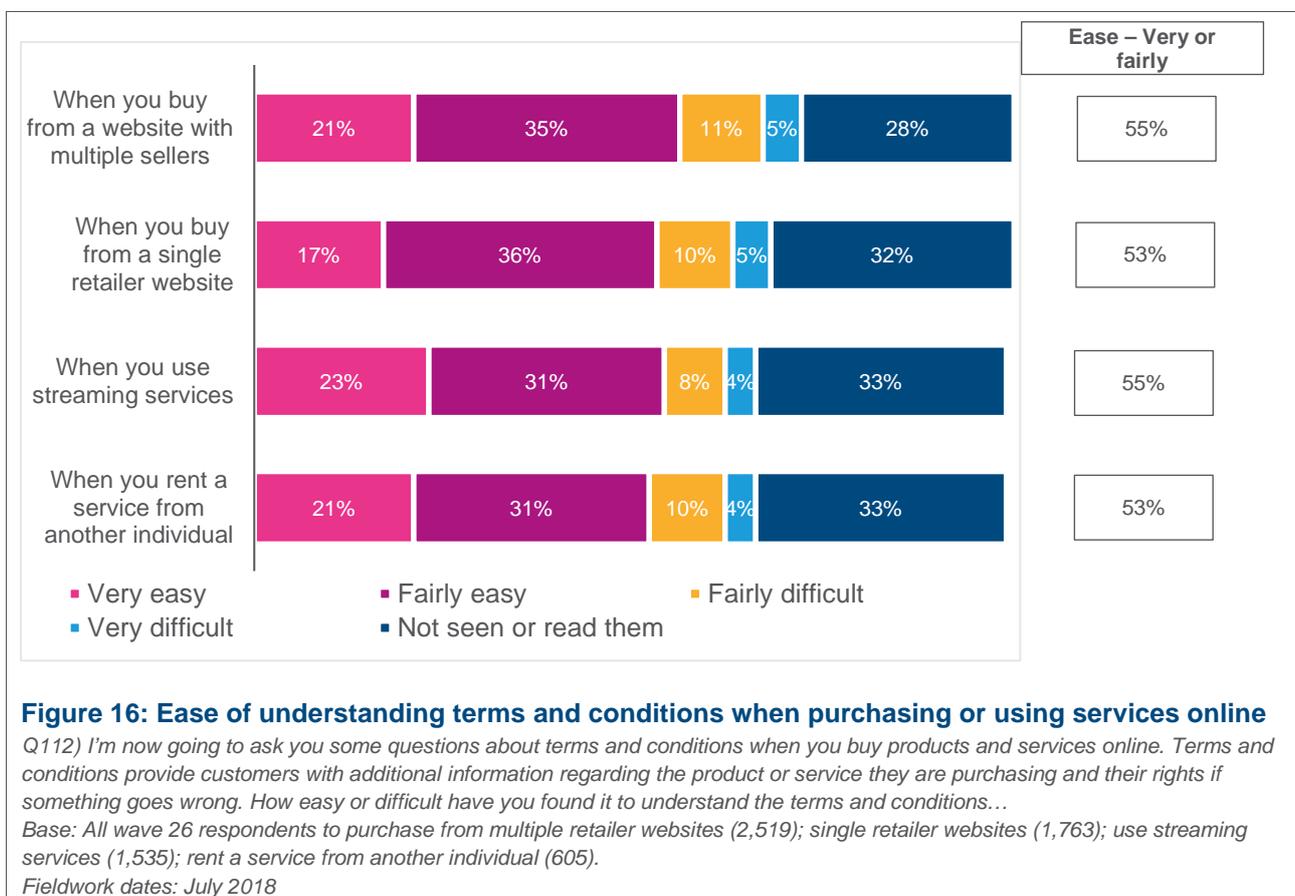
Base: All wave 26 respondents with household incomes up to £15,999 (770), £16,000 to £24,999 (450); £25,000 to £34,999 (410); £35,000 to £49,999 (365) and £50,000 or more (226).

Fieldwork dates: July 2018

Understanding terms and conditions and privacy policies

Follow-up questions were asked of those who had bought something online or who had used online services (either streaming services or renting a service from another individual) in the last 12 months, to determine how easy or difficult they found it to understand their terms and conditions.

Just over half claimed that it was easy (very or fairly) to understand the terms and conditions of each product or service. Between four and ten and five in ten people said it was difficult (very or fairly) to understand this information, with at least three in ten saying it was very difficult for each category. For each of the websites and online services, around three in ten people said they had not seen or did not read the terms and conditions.



Those that had used social media in the last 12 months were asked how easy or difficult it was to understand privacy notices for the social media platforms used. Six in ten (58%) users found it easy (very or fairly) to understand privacy notices. Two in ten (18%) had not seen or read privacy notices. Those aged 16 to 24 were more likely to find it easy to understand privacy notices, while those aged 65+ were least likely to find this easy (70% vs. 45%).

Consumer protection

The public were also asked their views on consumer protection. They were asked who offered the best consumer rights protection:

- A store on the high street or the website of a store on the high street.
- The website of a store on the high street or a private seller online.

Consumers have similar protections whether purchasing goods from a high street retailer or a retailer online, although they do have enhanced rights on returns for online purchases². On balance, people felt that they were offered better protection in terms of their consumer rights when buying from a store on the high street (33%) than when buying from the website of a high street retailer (11%). However, nearly half (48%) felt there was no difference. Those aged 65 and over (38%) and those in Scotland (42%) were most likely to think that buying from a store on the high street offered better consumer rights protection than when buying from the website of a high street retailer.

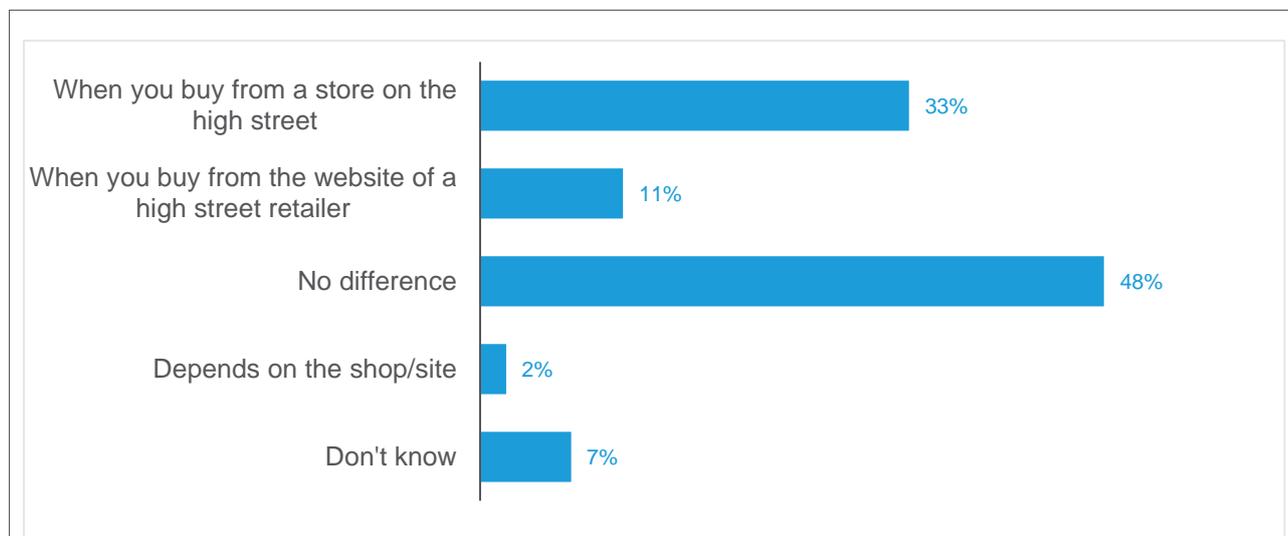


Figure 17: Whether buying from a website of a high street retailer or buying from a store on the high street offers the best protection in terms of consumer rights

Q114) Which of the following do you think offers the best protection in terms of your consumer rights?

Base: All wave 26 respondents (4,268)

Fieldwork dates: July 2018

² Purchases made online can be returned within 14 days as consumers have not had the chance to physically inspect them.

In general, the rights of a consumer are reduced when engaging in a transaction with a private seller, compared with a business online³. People were far less likely to think that buying from a private seller online (4%) offered better protection compared with buying from the website of a high street retailer (50%). A third (35%) felt that there was no difference. Those in Wales (70%), Scotland (60%) and the South East (60%) were most likely to think that buying from the website of a high street retailer offers better consumer rights protection compared with buying from a private seller online.

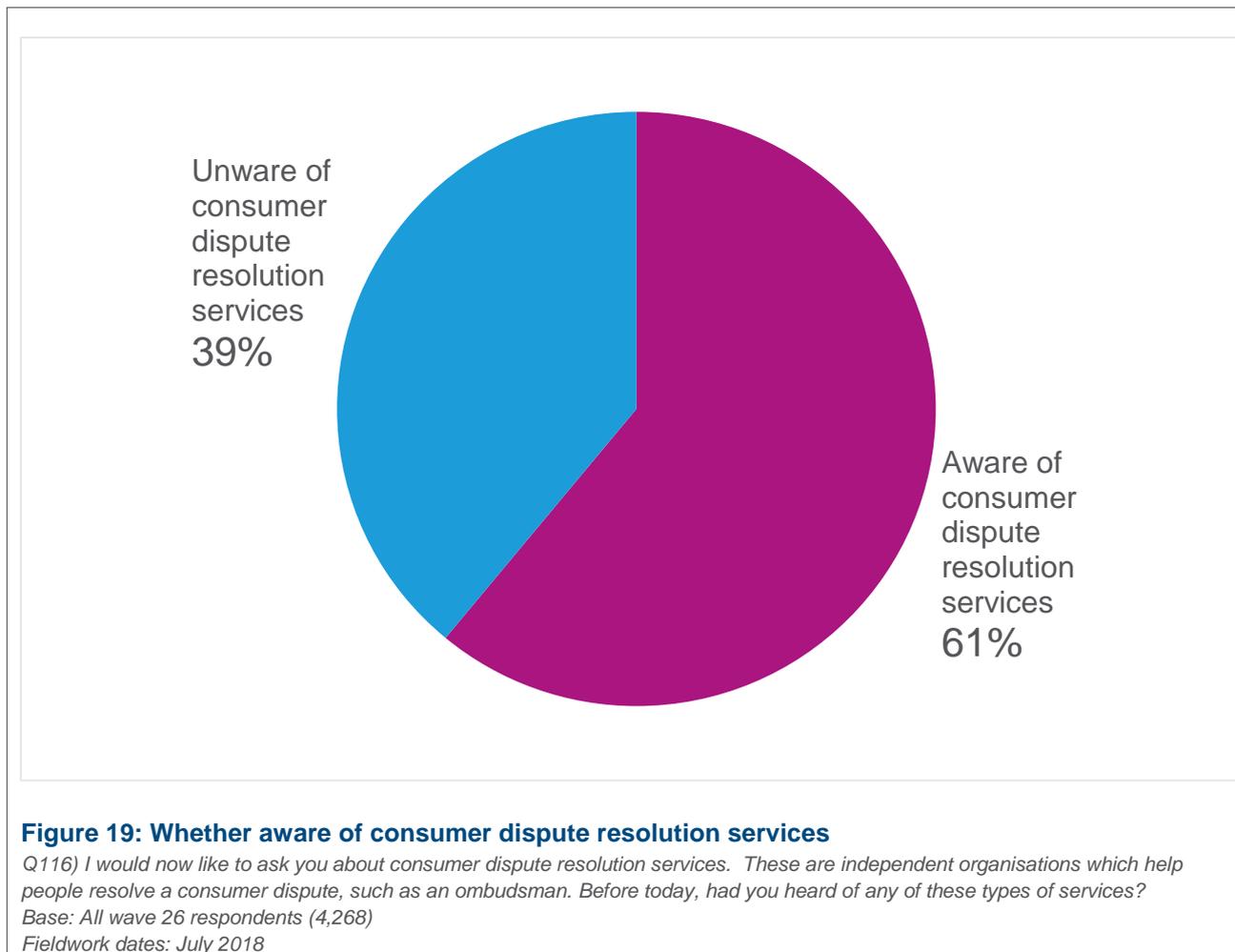


³ This reduction largely occurs when considering the rights related to the price and quality of the good/service, and the timeliness in which a service is provided. There are also some limited protections in consumer to consumer transactions with regards to redress if a product or service is faulty.

Consumer dispute resolution services

New questions were introduced at wave 26 to provide information on consumer dispute resolution services.

Six in ten respondents said they were aware of consumer dispute resolution services. Those in Northern Ireland (86%), those with household incomes over £50,000 (80%), those aged between 55 and 65 (78%), and those in social grade AB (78%) reported higher levels of awareness.



Respondents who had heard of consumer dispute resolution services were presented with six true or false statements on ombudsman services. The majority were likely to think that an ombudsman is independent of business (89%), that an ombudsman's decision is impartial (86%), that consumers can only use an ombudsman if they have first given the business they are in dispute with an opportunity to resolve their complaint (77%), and that businesses are required to act on the decision of an ombudsman (74%). One in ten (10%) thought using an ombudsman means you need to go to court to resolve your dispute and that consumers need to pay a fee for using an ombudsman.

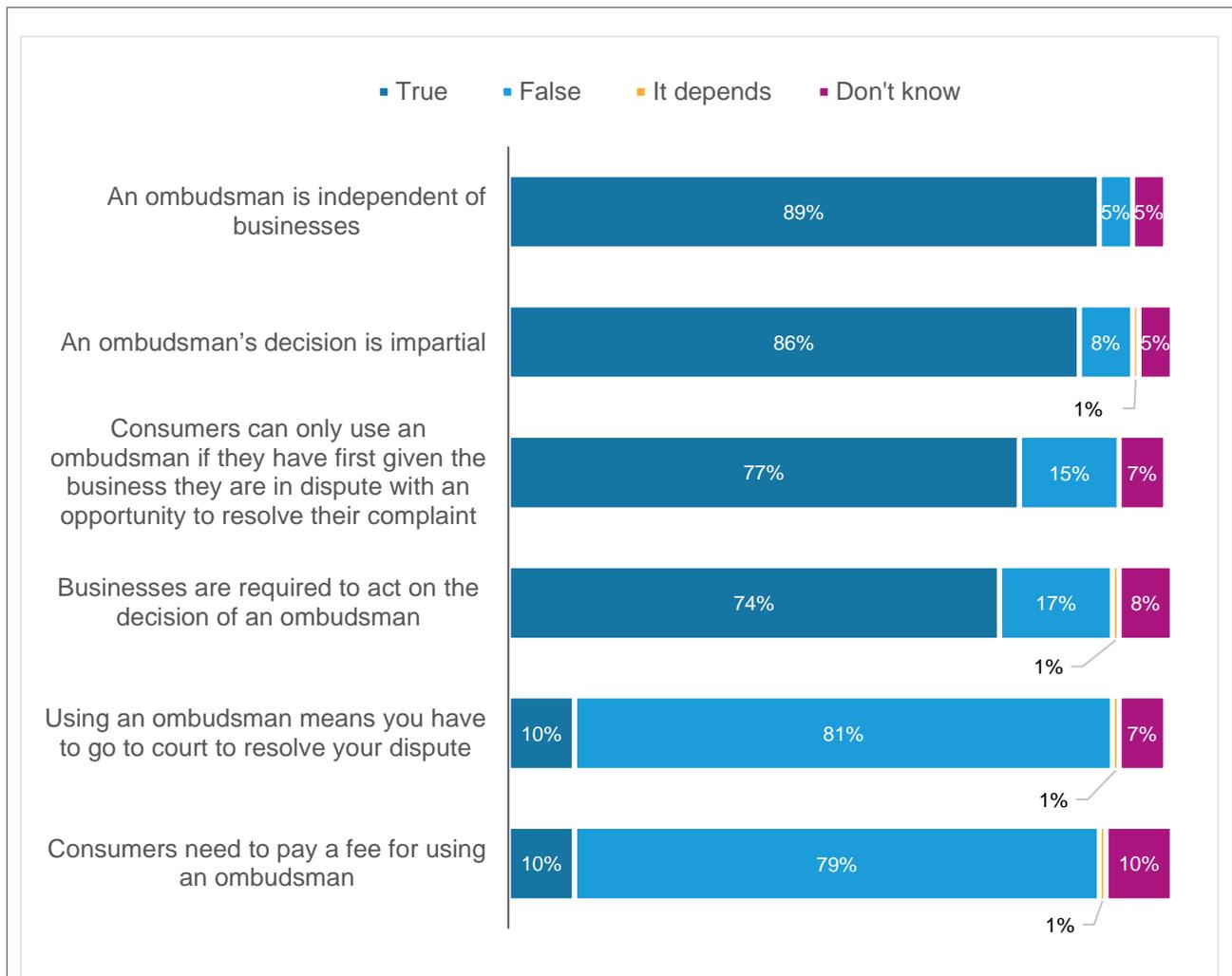


Figure 20: True of false statements on ombudsman services

Q117) I'm now going to read out a series of statements about ombudsman services. For each, please tell me whether you think it is true or false.

Base: All wave 26 respondents aware of consumer dispute resolution services (2,531).

Fieldwork dates: July 2018

The correct answers for each of these statements are as follows:

- An ombudsman is independent of business: True
- An ombudsman's decision is impartial: True
- Consumers can only use an ombudsman if they have first given the business they are in dispute with an opportunity to resolve their complaint: True
- Businesses are required to act on the decision of an ombudsman: True
- Using an ombudsman means you have to go to court to resolve your dispute: False
- Consumers need to pay a fee for using an ombudsman: False

Almost a quarter of people (23%) provided the correct answer at all six statements. Those most likely to answer all six statements correctly included:

- Those aged 35 or over (28%, compared with 19% of 25 to 34 year olds and just 5% of 16 to 24 year olds).
- Those in higher social grades: 30% of people in social grades ABC1 selected the correct answer for all statements compared with 15% of those in social grades C2DE.
- People in Scotland (29%), Wales (29%), South East England (28%) and Northern Ireland (27%).

Consumer problems

The wave 26 questionnaire included new questions on experience of consumer problems. All respondents were asked whether they had experienced a problem with a provider in the previous 12 months.

Overall, almost a quarter of respondents (23%) had experienced a problem with a provider in the last 12 months. Problems were most commonly experienced with retail or shopping providers (6%), broadband providers (5%) and energy providers (4%). Three quarters of respondents (76%) had not experienced any problems with providers in the last 12 months.

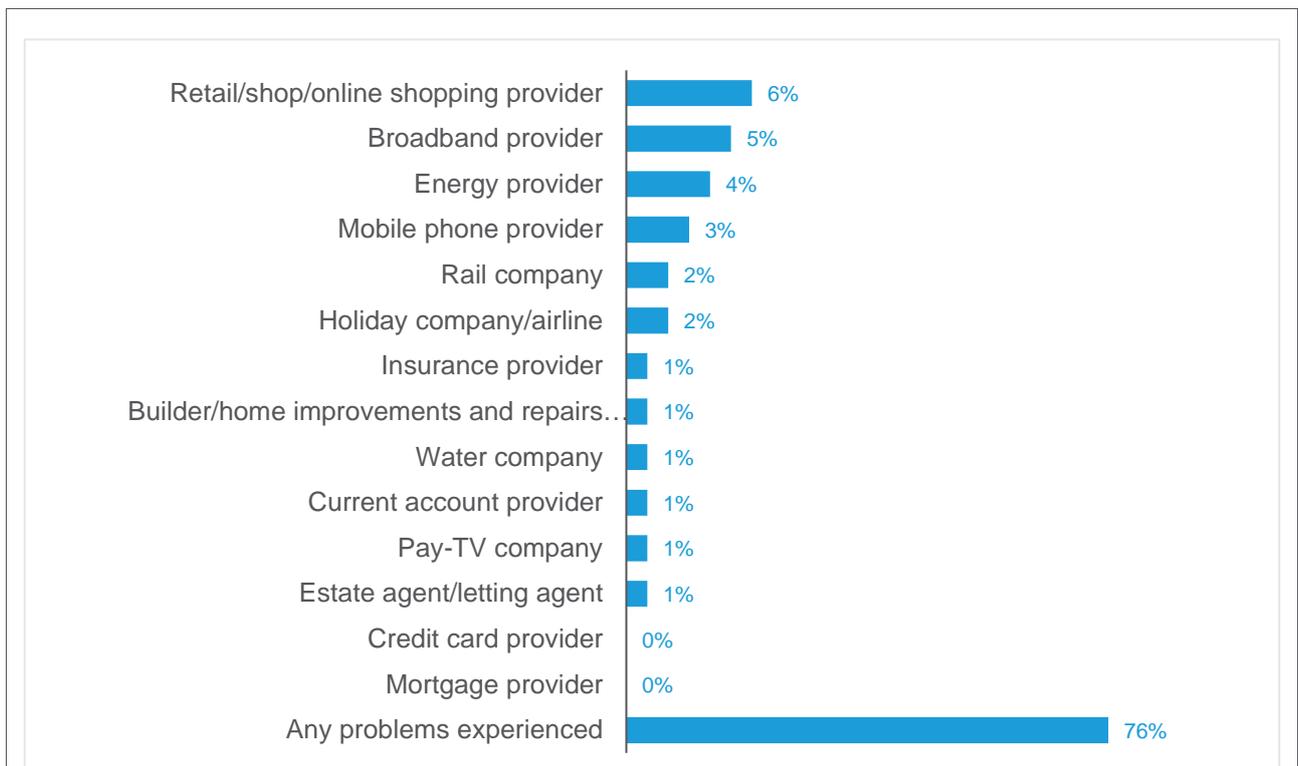


Figure 21: Whether experienced a problem with each type of provider in last 12 months

Q120) In the last 12 months, that is since [MONTH / YEAR], have you experienced a problem with any of the following providers, whether or not this was eventually resolved?

Base: All wave 26 respondents (4,268)

Fieldwork dates: July 2018

People who had switched provider for a product or service in the last 12 months were more likely to have experienced a problem with their provider for this product or service in the same period. This difference was particularly apparent for energy; 13% of those who had switched their energy provider or tariff had experienced a problem with their energy provider in the last 12 months, compared with 3% of those who had not switched. Since it is not clear whether problems were experienced with a current or previous provider, we are uncertain whether problems with providers prompted people to switch, or whether problems were more likely after switching to new suppliers.

There were some notable differences in experience of problems by region. Respondents in Northern Ireland were most likely to have experienced a problem with any provider in the last 12 months, and those in Wales least likely. Due to small base sizes, it is not possible to compare the experience of problems with different types of providers between regions.

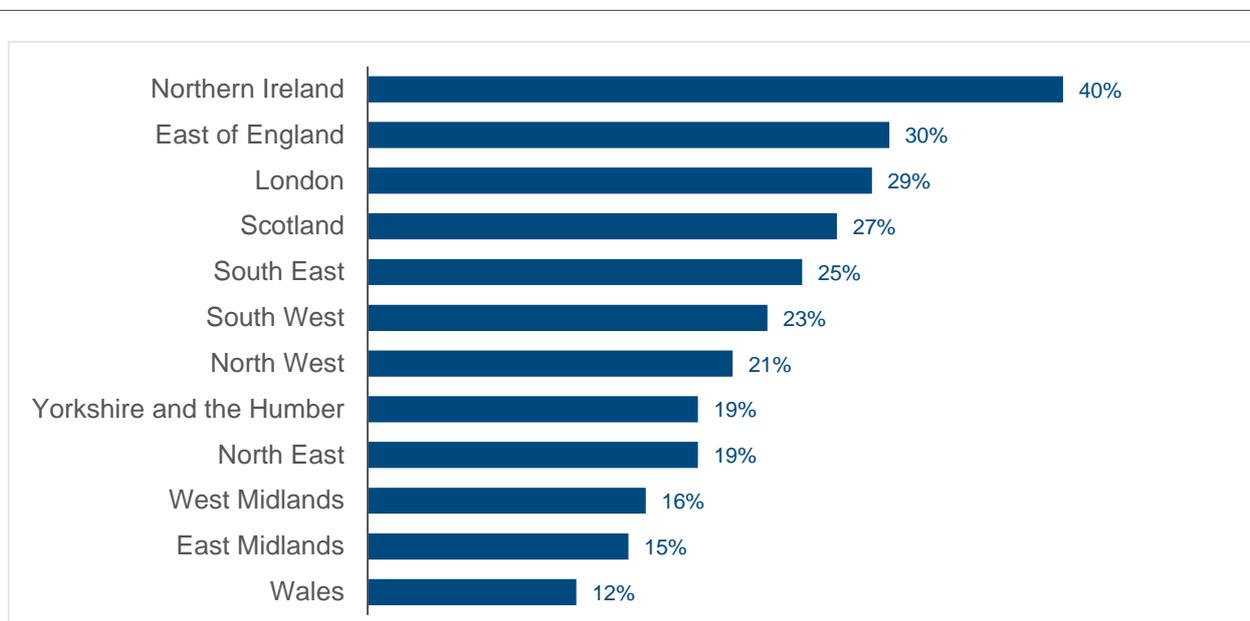


Figure 22: Whether experienced a problem with a provider in the last 12 months by region

Q120) In the last 12 months, that is since [MONTH / YEAR], have you experienced a problem with any of the following providers, whether or not this was eventually resolved?

Base: All wave 26 respondents in Northern Ireland (130); East of England (384); London (504); Scotland (379); South East (576); South West (355); North West (475); Yorkshire and the Humber (368); North East (179); West Midlands (393); East Midlands (309); Wales (216).

Fieldwork dates: July 2018

People who experienced a problem with a provider were asked a series of follow-up questions on their experience. Where problems were experienced with multiple providers, these questions were repeated in relation to each provider. Due to the low incidence of problems with some providers, it is not possible to report on these questions for each type of provider. We therefore limit this analysis to providers where at least 50 respondents experienced a problem: energy providers (176 respondents), insurance providers (53), mobile phone providers (107), broadband providers (186), rail companies (67), holiday companies/airlines (76), and retail/shopping (205).

Most people contacted their provider in response to their problem. They were most likely to contact their broadband provider and least likely to contact a rail company.

Contact with someone other than the provider was less common. This was most common in the case of problems with insurance providers and least common for problems with rail companies.

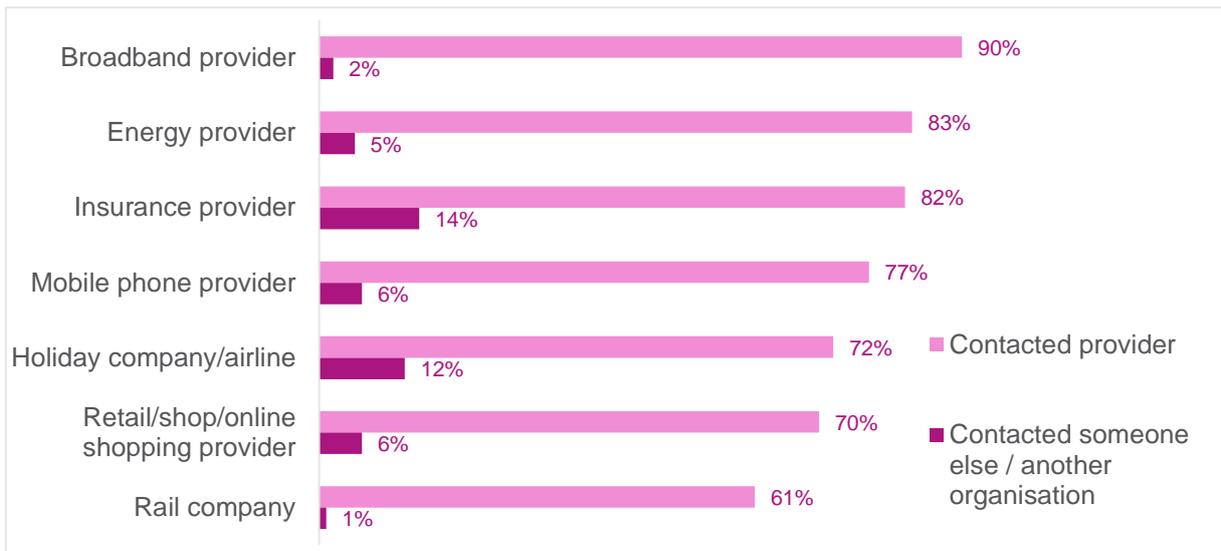


Figure 23: Whether contacted provider or someone else in response to problem

Q121) Thinking about your most recent problem with the [PROVIDER], did you contact anyone about this problem?

Base: All wave 26 respondents who had a problem with their broadband provider (186); their energy provider (176); their insurance provider (53); their mobile phone provider (107); a holiday company/airline (76); retail/shop/an online shopping provider (205); a rail company (67).

Fieldwork dates: July 2018

People were asked whether they had resolved their problem directly with the provider. For most providers, between six in ten and seven in ten customers managed to resolve their problem directly. Those who experienced problems with rail companies and holiday companies or airlines were less likely to have resolved the problem directly with the provider.

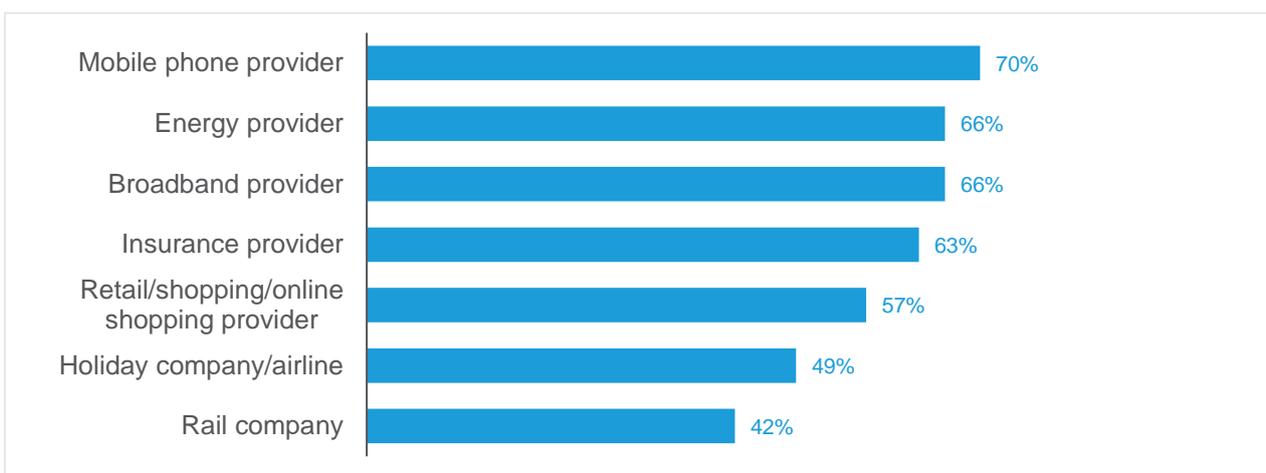


Figure 24: Whether problem was resolved directly with the provider

Q122) And did you resolve the problem directly with the provider?

Base: All wave 26 respondents who had a problem with their mobile phone provider (107); their energy provider (176); their broadband provider (186); their insurance provider (53); a holiday company/airline (76); retail/shop/an online shopping provider (205); a rail company (67).

Fieldwork dates: July 2018

Further questions were included to ask respondents what other action they took in response to their problem and, where applicable, why they did not contact an ombudsman or other dispute resolution service. However, due to small base sizes, it is not possible to report on responses to these questions.

Trust in consumer organisations

A new question was introduced at wave 26 to gauge peoples' trust in consumer groups and services. Everyone was asked how much they trusted each of the following:

- Ofgem
- Energy suppliers
- Price comparison websites
- Consumer groups, including Which? and Money Saving Expert
- Citizens Advice
- Trading standards
- Government websites

Levels of trust were highest for Citizens Advice and Trading Standards, followed by government websites, consumer groups, price comparison websites and Ofgem.

A quarter of people said they did not know how much they trusted Ofgem, indicating a lower level of awareness compared with the other organisations and services included at this question.

Levels of trust were lowest for energy suppliers. Four in ten people trusted energy suppliers a lot or a fair amount but a greater proportion (just over half) said they did not trust them very much or did not trust them at all.

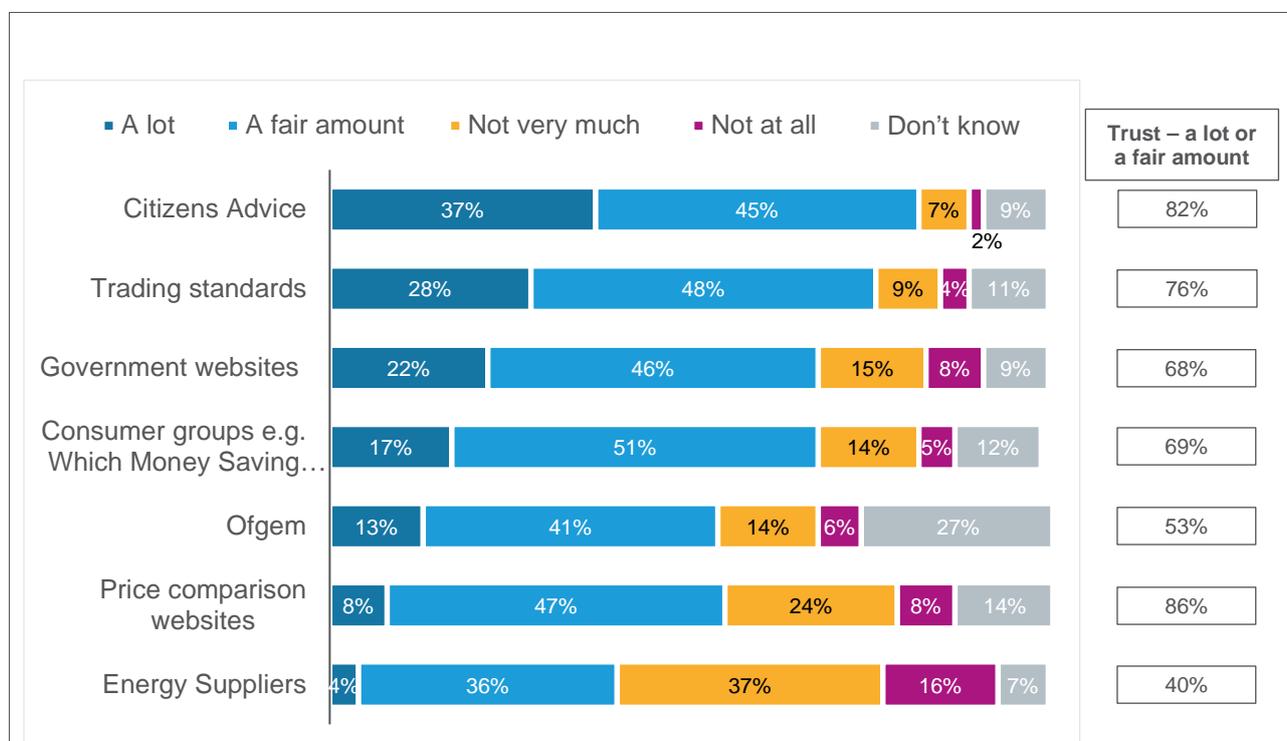


Figure 25: Trust in consumer organisations

Q130) How much, if at all, do you trust the following to give you impartial information?

Base: All wave 26 respondents (4,268)

Fieldwork dates: July 2018

Technical appendix

Technical notes

The wave 26 summary report provides selected headlines and highlights statistically significant differences between Wave 26 and previous waves. Some of the questions yielded low base sizes and therefore could not be included in the report. Notes have been added to the report where this is the case.

Percentages included on charts in this report may not add up to 100% due to rounding, the exclusion of some categories (e.g. 'Don't know' and 'Refused') and the option for more than one response to be selected at some questions.

This report is not an exhaustive overview of the findings. Please refer to the accompanying excel summary tables, excel dataset and PDF data tables to see full responses to all survey questions.

The results shown here are based on 4,268 face-to-face in-home interviews conducted with a representative sample of UK adults aged 16+. Fieldwork was conducted between 11th July and 17th July on the Kantar TNS Omnibus, which uses a random location quota sampling method. The questionnaire was designed by BEIS and Kantar Public drawing on several questions from previous surveys. Questions were refined through cognitive testing. The representativeness of the data was controlled through sample design, fieldwork quotas and post-fieldwork weighting. Data were weighted for the following characteristics: sex, age, social grade, region and tenure. Results included here are based on weighted data.

Fieldwork dates and sample sizes

Table 1: Fieldwork dates and sample sizes for each wave

Wave	Fieldwork dates	Sample sizes
Wave 1 (Mar 2012)	21 - 25 March 2012	2,121
Wave 2 (Jun 2012)	27 June - 1 July 2012	2,100
Wave 3 (Sep 2012)	26 - 30 September 2012	2,118
Wave 4 (Dec 2012)	12 December 2012 - 2 January 2013	2,107
Wave 5 (Mar 2013)	27 - 31 March 2013	2,051

Wave	Fieldwork dates	Sample sizes
Wave 6 (Jul 2013)	3 - 7 July 2013	2,124
Wave 7 (Sep 2013)	25 - 29 September 2013	2,103
Wave 8 (Dec 2013)	11 - 15 December 2013	2,110
Wave 9 (Mar 2014)	26 - 30 March 2014	2,040
Wave 10 (Jun 2014)	25 - 29 June 2014	2,087
Wave 11 (Sep 2014)	24 - 28 September 2014	2,103
Wave 12 (Dec 2014)	10 December 2014 - 8 January 2015	2,119
Wave 13 (Mar 2014)	18 - 29 March 2015	1,981
Wave 14 (Jun 2015)	24 - 28 June 2015	2,118
Wave 15 (Sep 2015)	23 - 27 September 2015	2,121
Wave 16 (Dec 2015)	9 - 13 December 2015	2,121
Wave 17 (Mar 2016)	23 - 27 March 2016	2,105
Wave 18 (Jun 2016)	29 June - 3 July 2016	2,114
Wave 19 (Sep 2016)	28 September - 2 October 2016	2,080
Wave 20 (Dec 2016)	14 - 18 December 2016	2,138
Wave 21 (Mar 2017)	29 March - 2nd April 2017	2,180
Wave 22 (Jun 2017)	30 June - 4 July 2017	2,097
Wave 23 (Sep 2017)	27 September - 1 October 2017	2,105
Wave 24 (Dec 2017)	13 - 17 December 2017	2,078
Wave 25 (Mar 2018)	28 March - 6 April	2,102
Wave 26 (Jul 2018)	11 - 17 July	4,268



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