

National Consumer Agency

Market Research Findings: Consumer Switching Behaviour



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August 2012

Research Conducted by

amárach 
research

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Key Findings

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Key Findings - I



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- Overall **32%** of consumers have **switched at least one** product or service provider in the past year, most likely to have been
 - Car insurance (16%)
 - Broadband Internet provider (14%)
 - Fixed Landline Provider (13%)
- Savings from Switching
 - **96%** of those who switched car insurance stated that they **saved money** by doing so with the average annual amount saved reported as **€125**
- The highest incidence of **multiple switching** is found in the grocery sector and car insurance

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Key Findings - II



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- **83%** of consumers stated that they found the switching process easy
- **59%** of consumers who have switched in the past year have found the new **service** they receive to **be better**. Just 1% stated that the service they receive is worse

Not Switching?

- The main reason cited for not switching is due to “*satisfaction with the quality/level of service of current provider*” with the next highest response being “*current supplier offers the best value for money*”
- Of those who have not switched, over 50% across most sectors rising to 2 in 3 in some sectors **have not checked** if there is a better package/deal available to them since signing up with current provider

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Consumer Switching Behaviour

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Extent of Switching Providers within the Past 12 Months

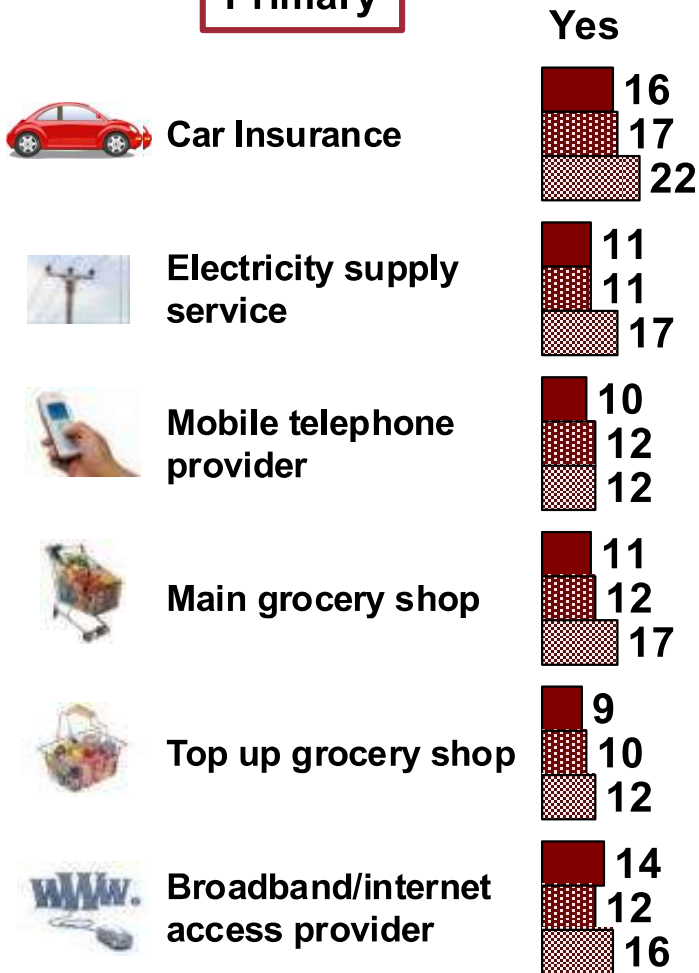


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Jun 2012
Nov 2011
May/June 2011

(Base: All holders/purchasers of products/services)

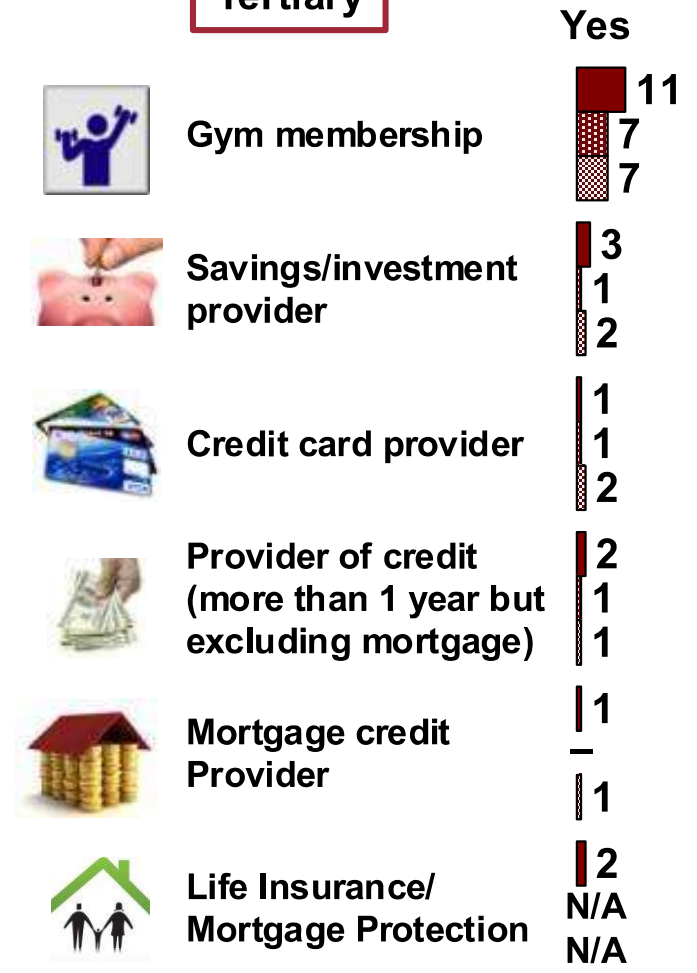
Primary



Secondary



Tertiary



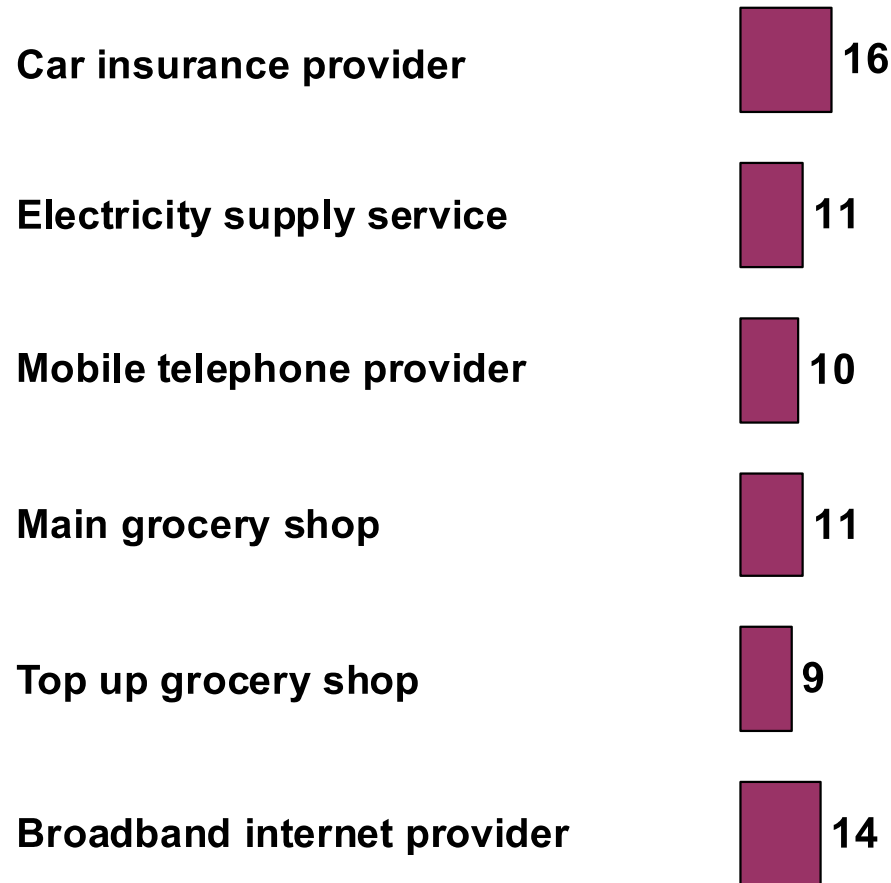
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Switching Trends – Primary

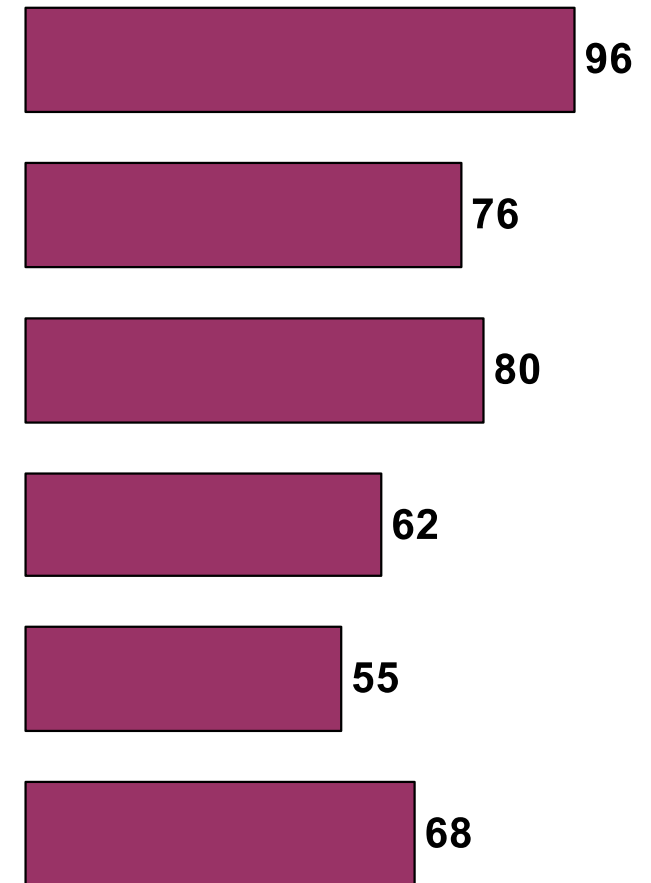


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**Incidence of switching
in the Past Year**
(Base: All holders/purchasers)
%



**Stated that they saved money as a
result of switching within the past
12 months**
(Base: All who have switched in the past year)
%



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Switching Trends – Secondary

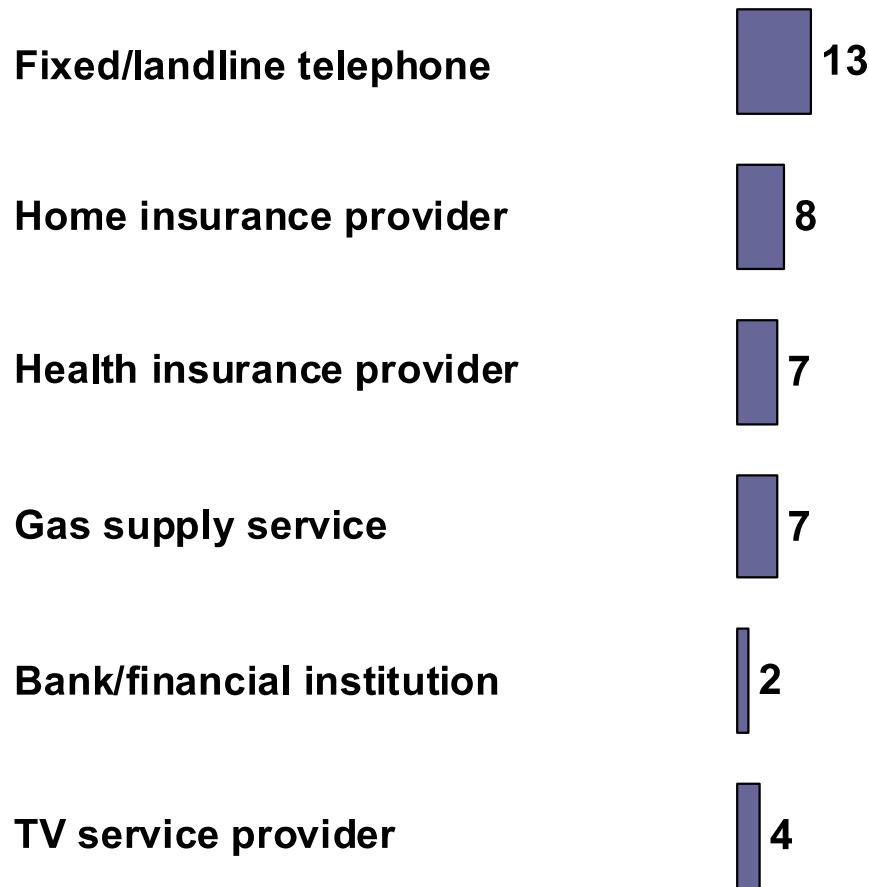


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Incidence of switching in the Past Year

(Base: All holders/purchasers)

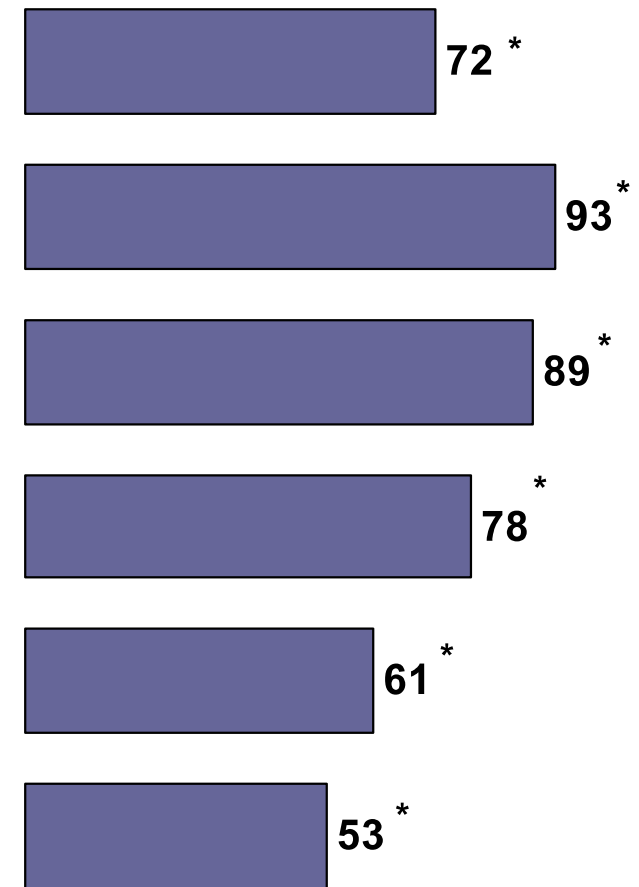
%



Stated that they saved money as a result of switching within the past 12 months

(Base: All who have switched in the past year)

%



* Caution small base

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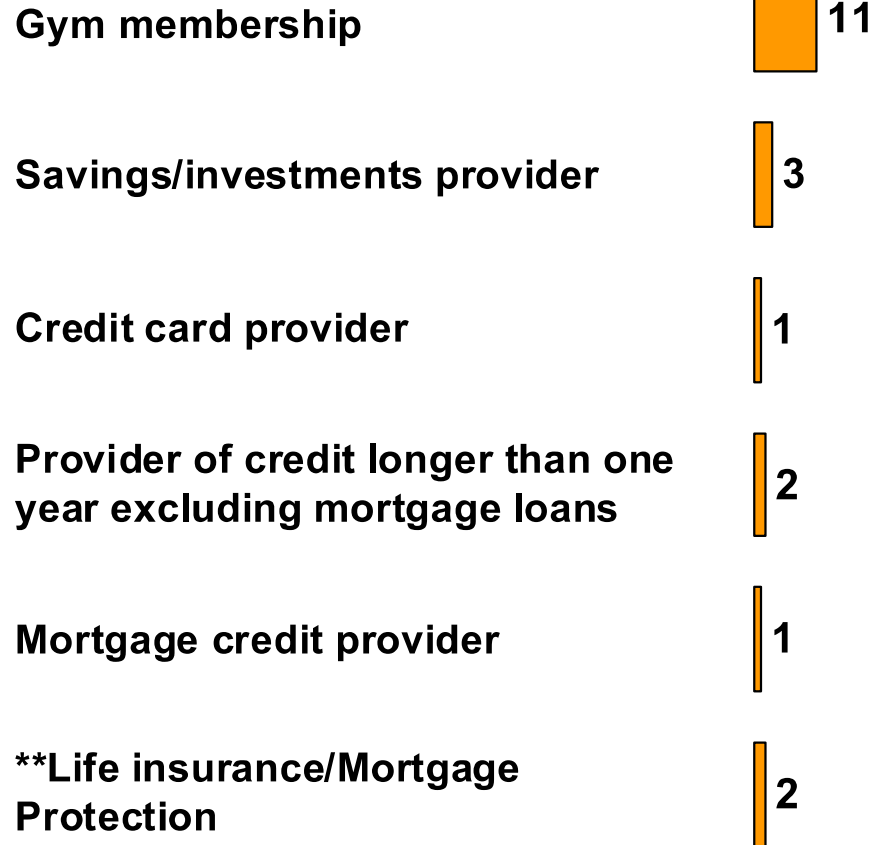
Switching Trends – Tertiary



Incidence of switching in the Past Year

(Base: All holders/purchasers)

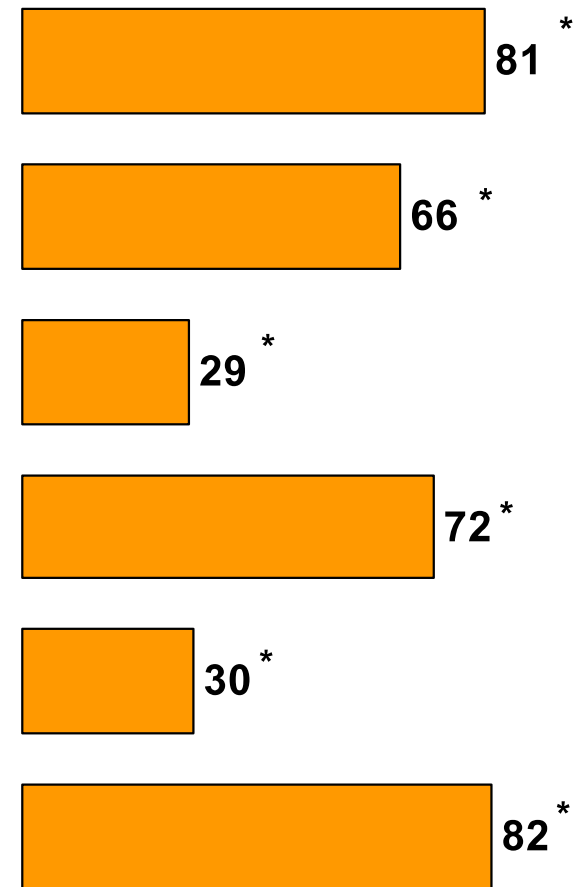
%



Stated that they saved money as a result of switching within the past 12 months

(Base: All who have switched in the past year)

%



* Caution small base

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Average Savings X Typical Billing Periods



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(Base: All who have saved by switching in the past 12 months)

Average Annual Saving



Car Insurance (102)	Electricity Supply (64)*	Home Insurance (36)*
€125.12	€168.60	€105.55

Average Monthly Saving



Mobile Phone (70)*	Broadband (57)*	Fixed Line (57)*
€22.42	€17.70	€21.86

* *Caution small base size*

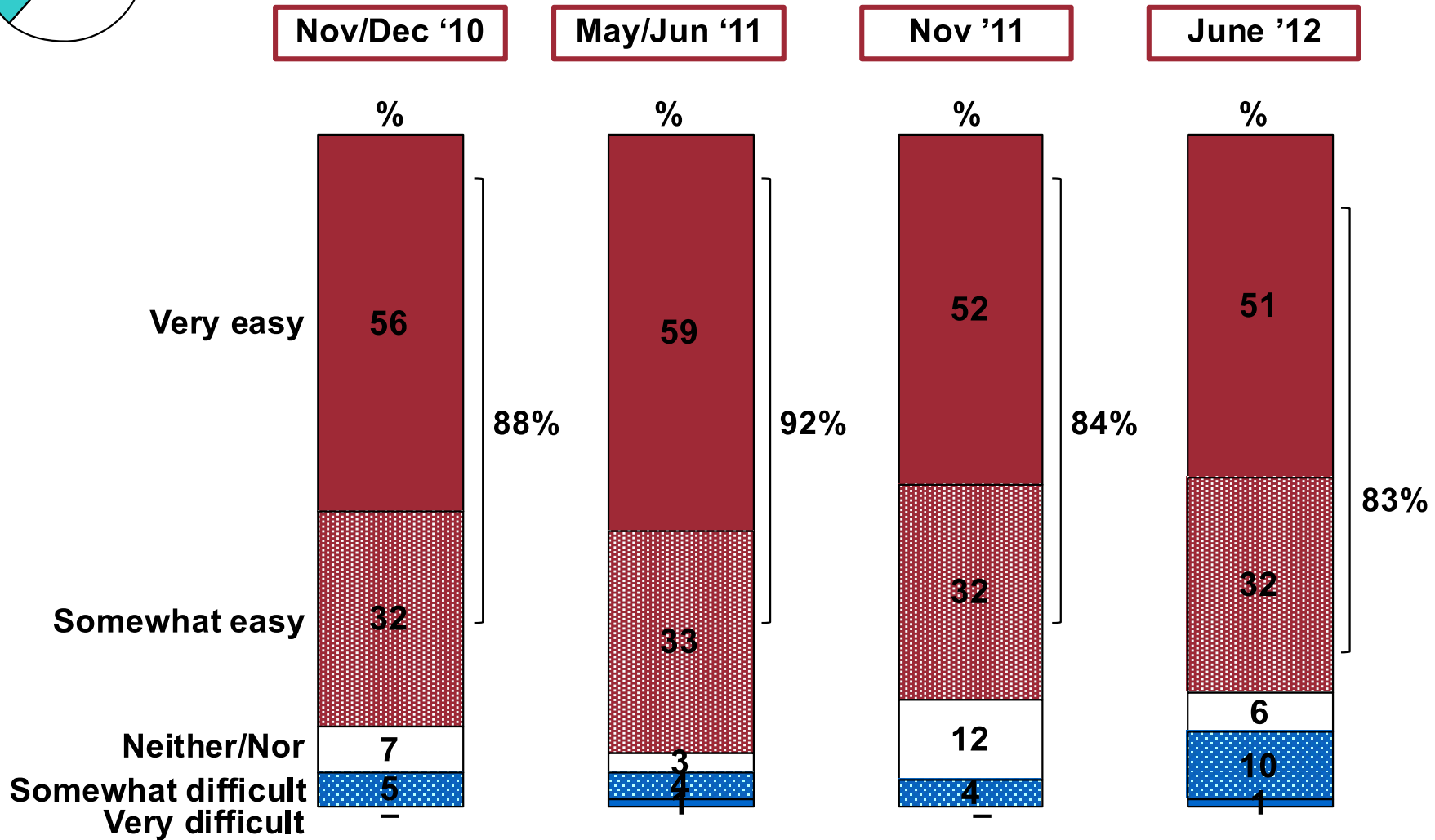
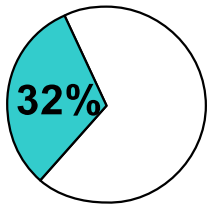
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Experience of the Switching Process



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(Base: All who have switched providers in the past 12 months)



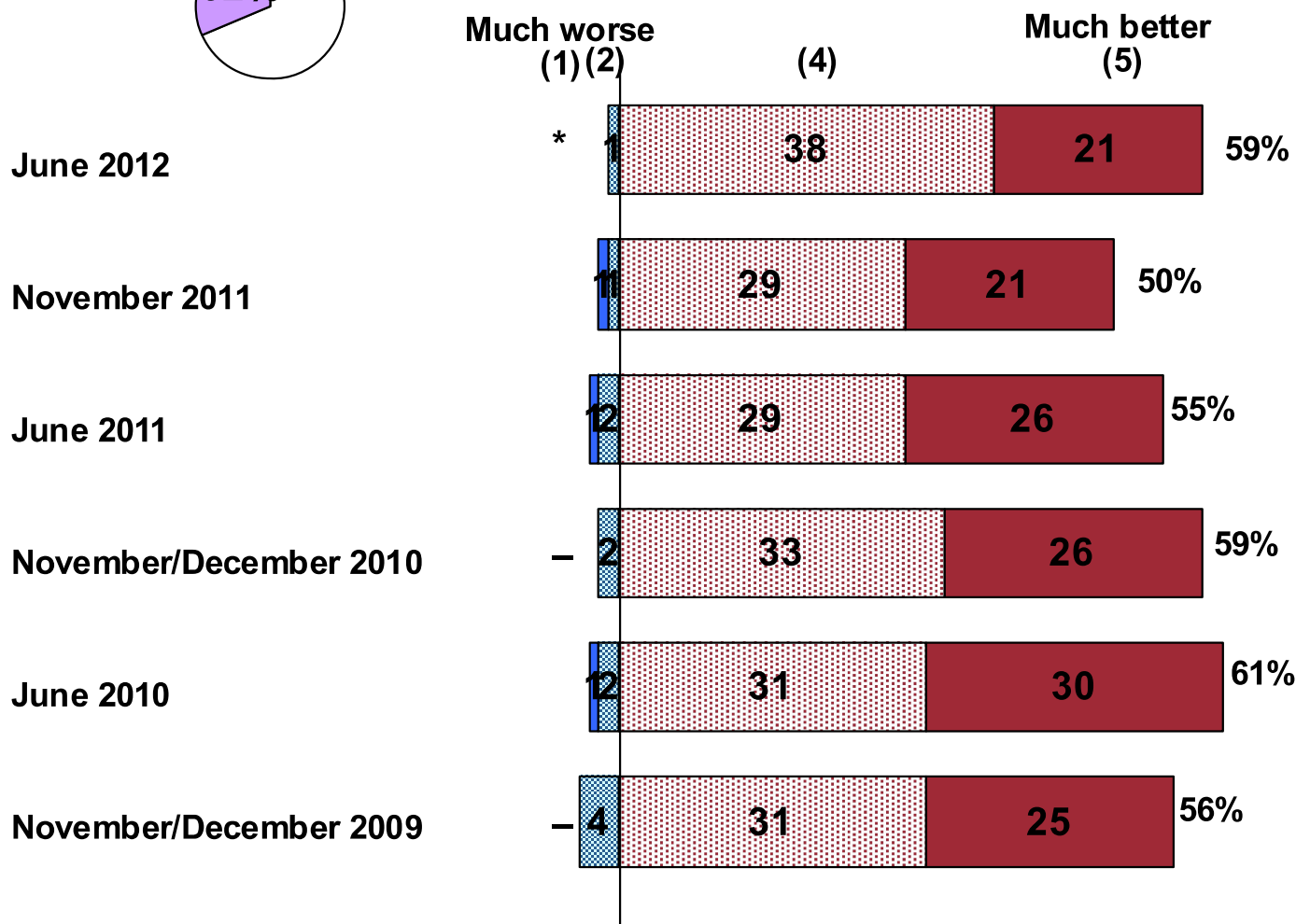
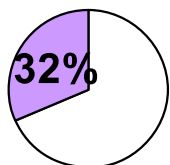
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Quality of Service Received with New Provider



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(Base: All who have switched service provider - 325)



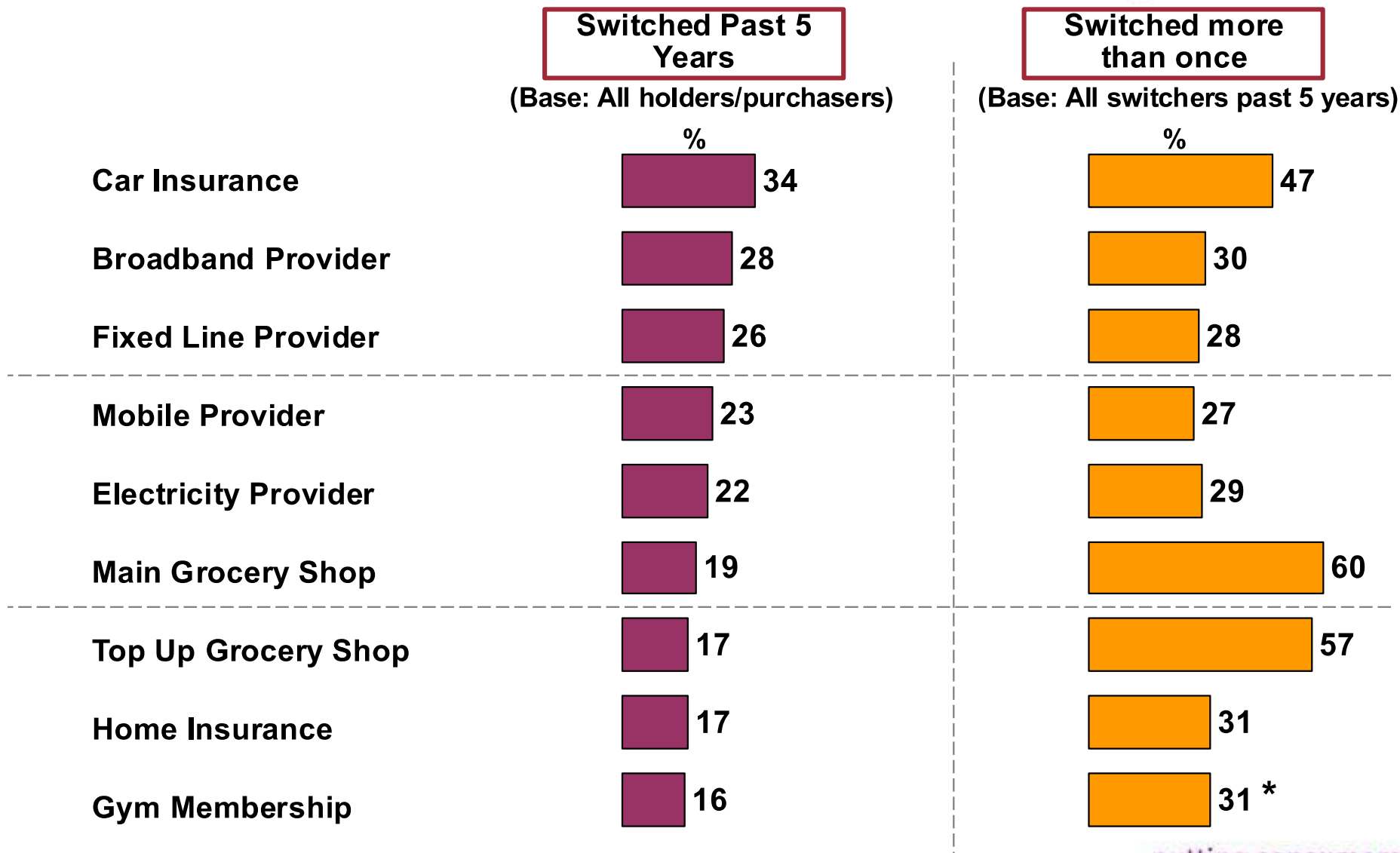
The same/ Don't know	Mean Score
39	3.8
48	3.8
42	3.8
39	3.9
36	4.0
40	3.9

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Switching Behaviour Past 5 Years – I



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* Caution small base

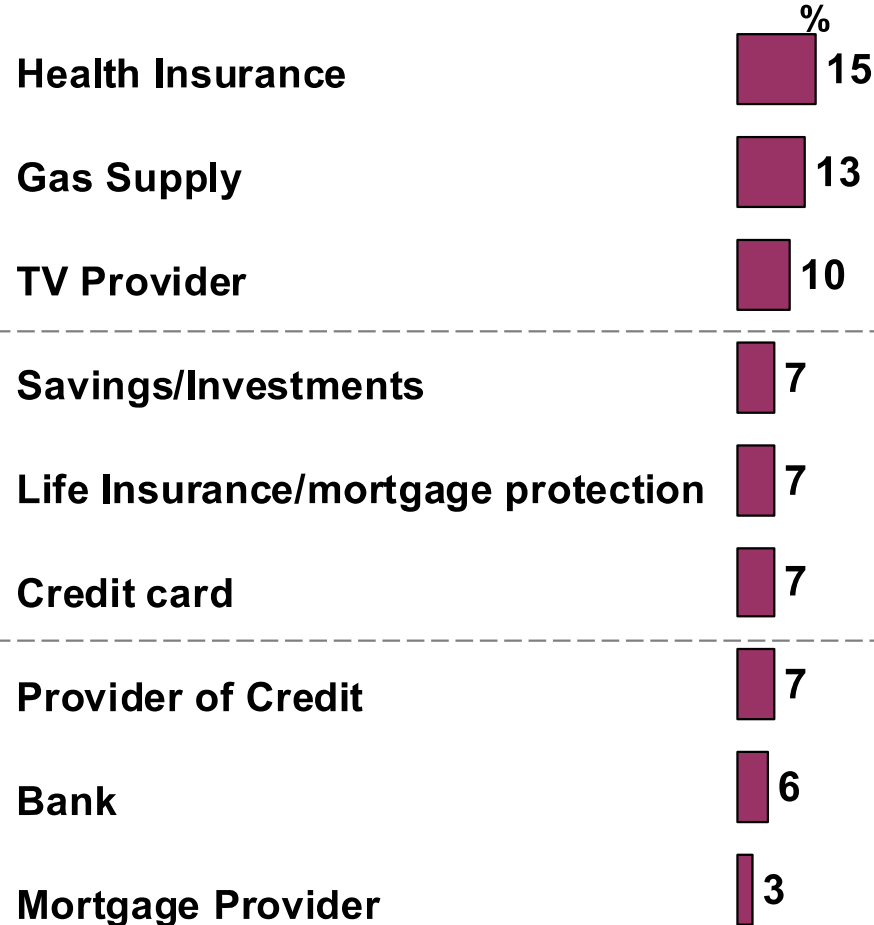
Switching Behaviour Past 5 Years – II



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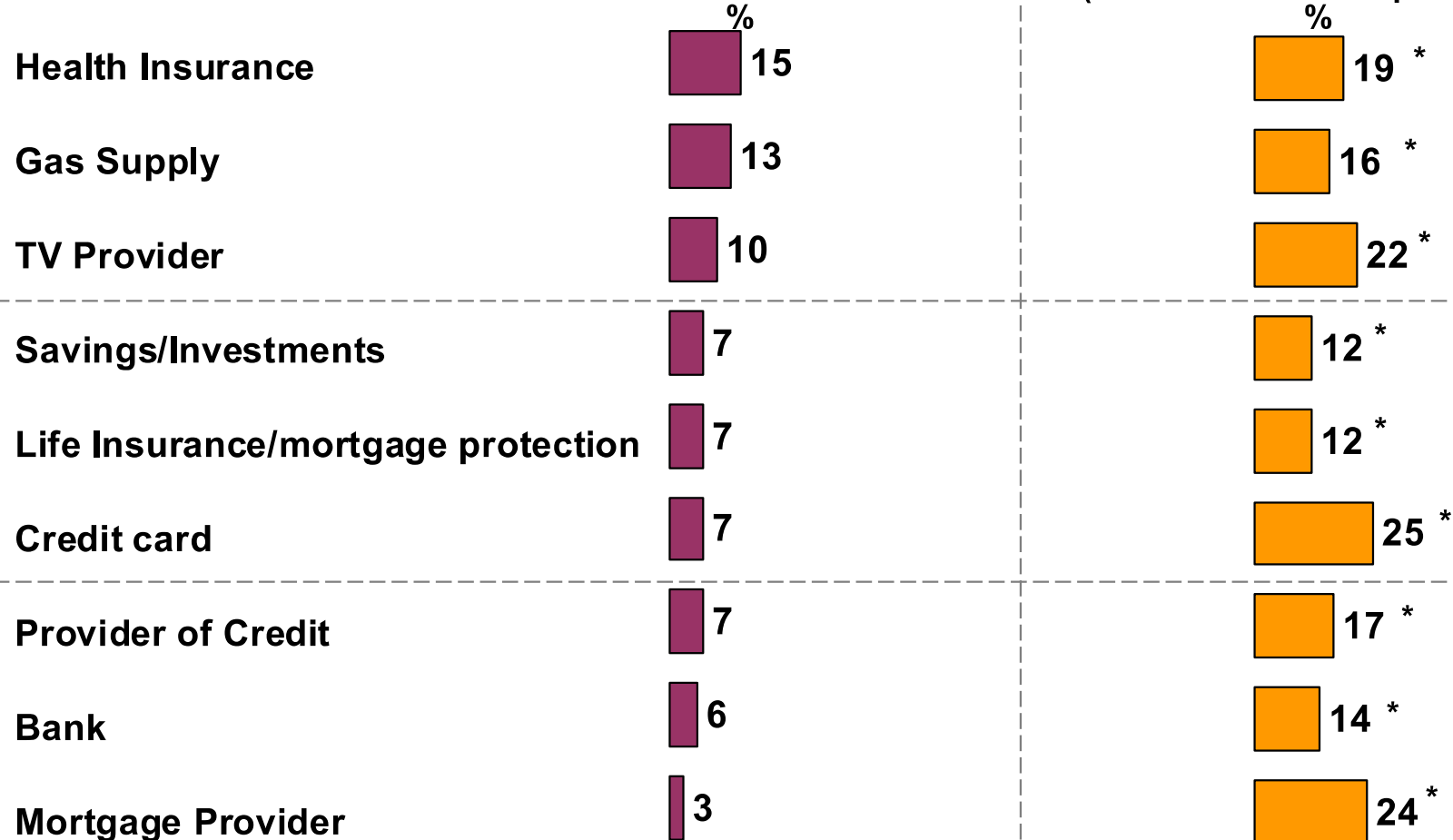
Switched Past 5 Years

(Base: All holders/purchasers)



Switched more than once

(Base: All switchers past 5 years)



* Caution small base

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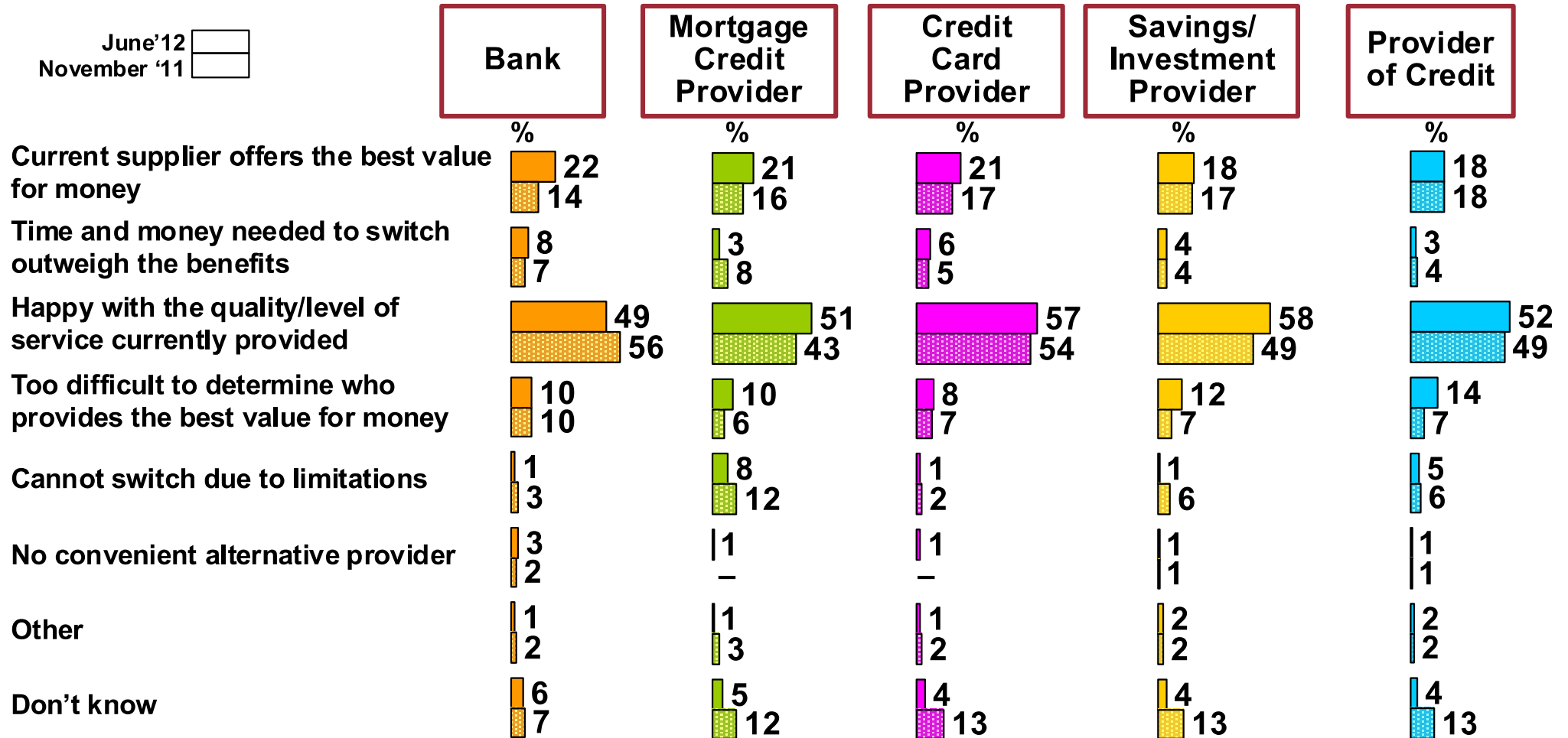
Reasons for Remaining with Current Provider – I

(Base: All that have not switched provider within the past 12 months)



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June '12
November '11



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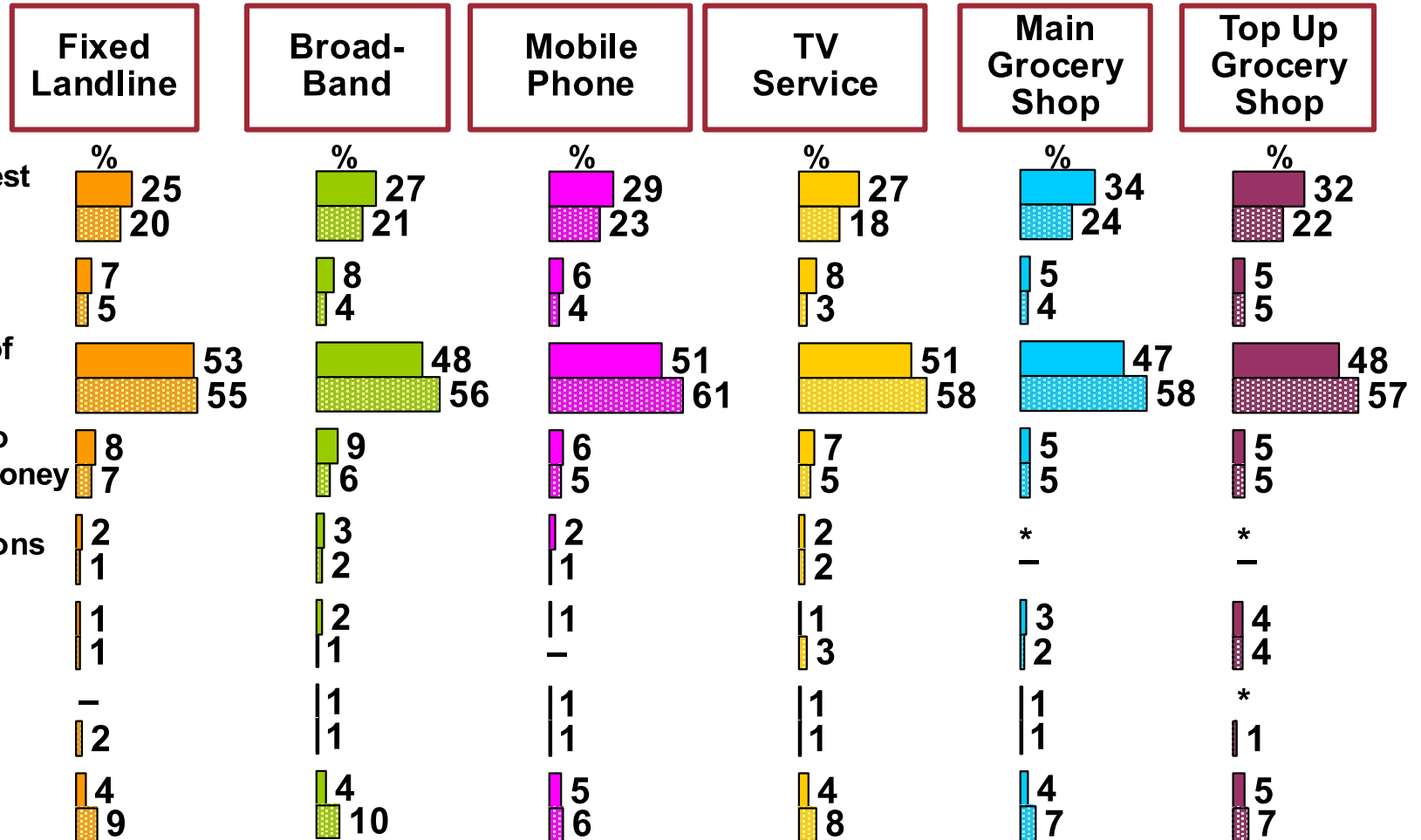
Reasons for Remaining with Current Provider – II

(Base: All that have not switched provider within the past 12 months)



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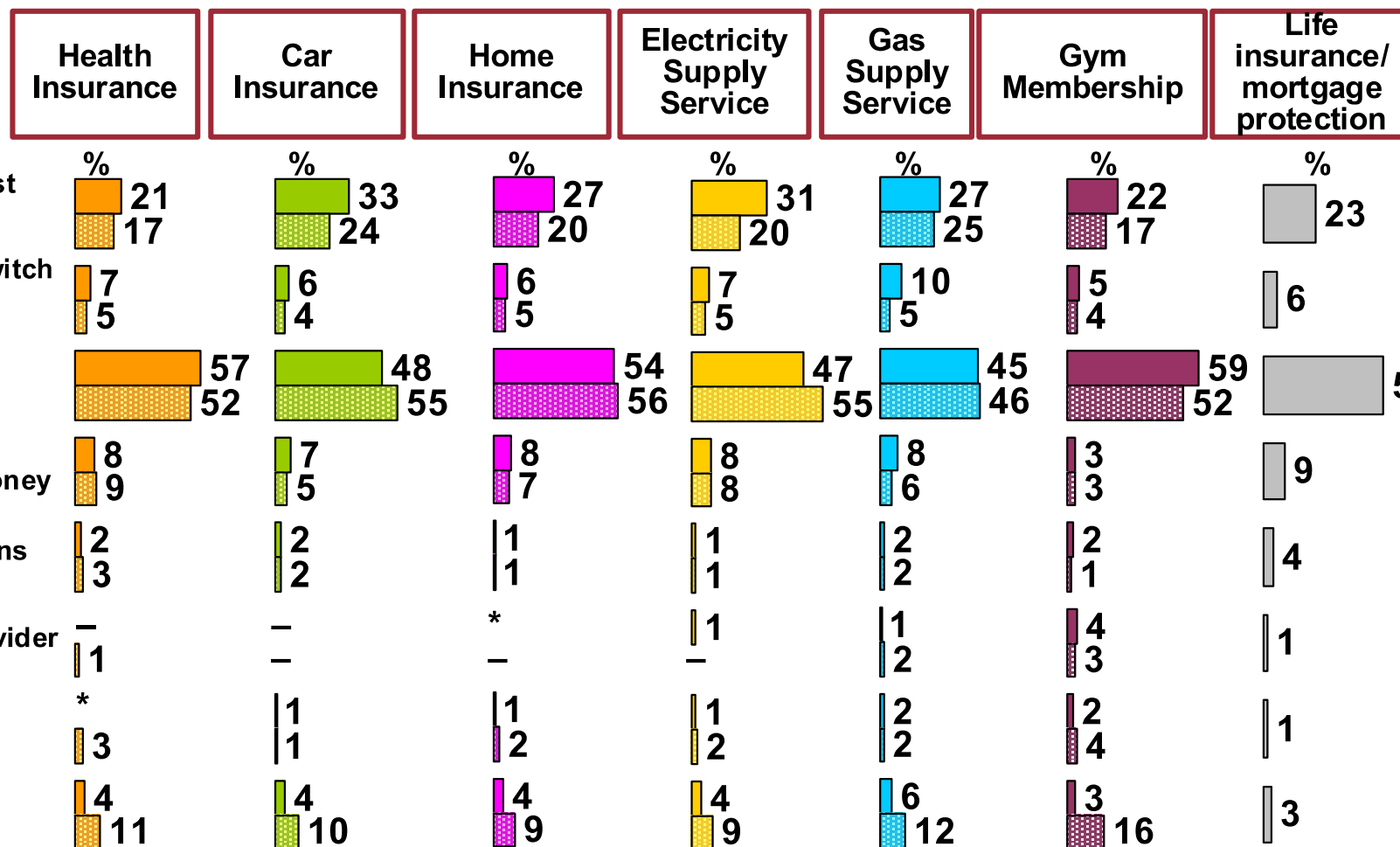
Reasons for Remaining with Current Provider – III



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(Base: All that have not switched provider within the past 12 months)

June '12
November '11



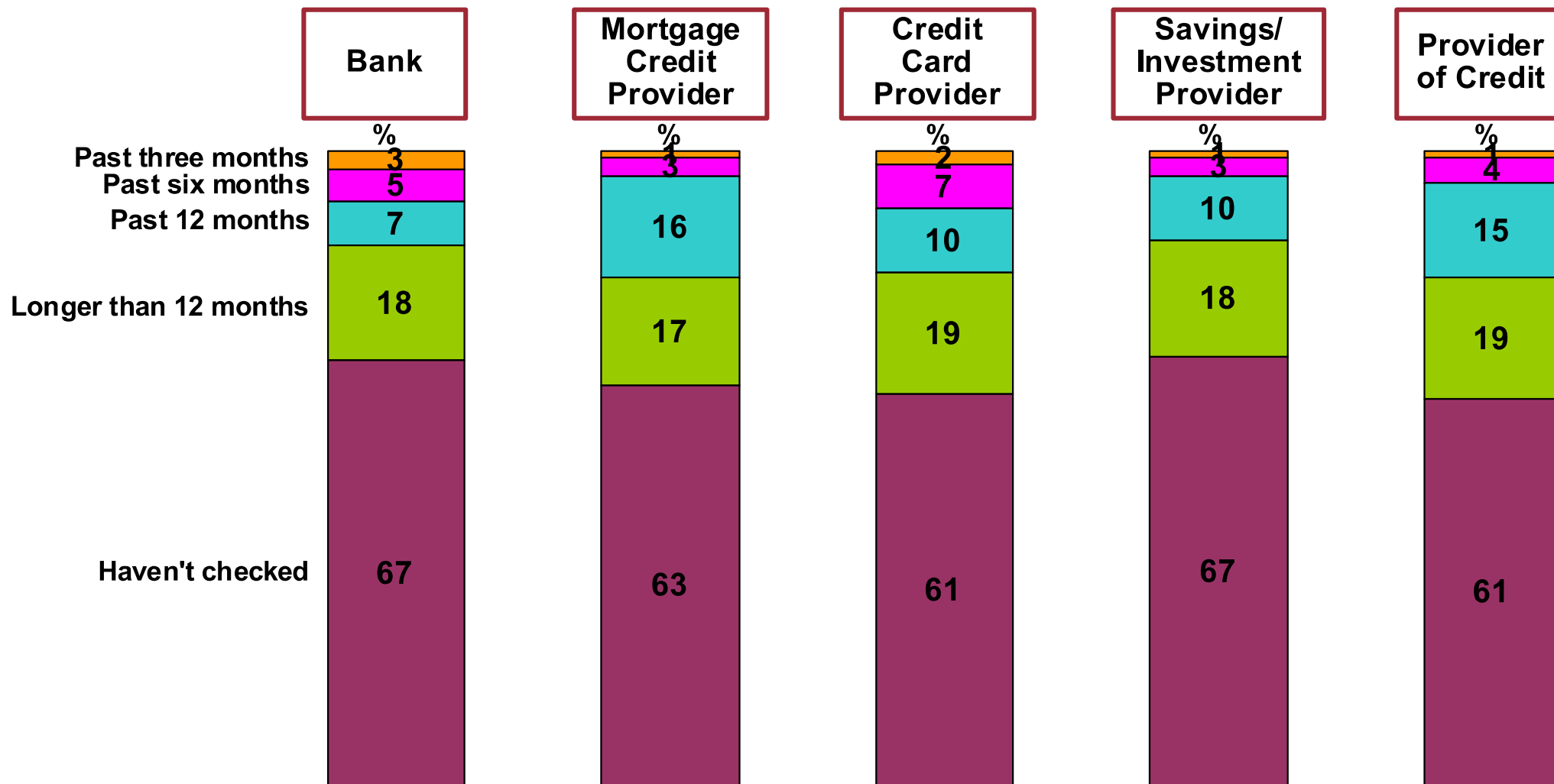
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Latest Occurrence of Checking Better Deals/Packages Available – I

(Base: All that have not switched provider within the past 12 months and not contract bound to provider)



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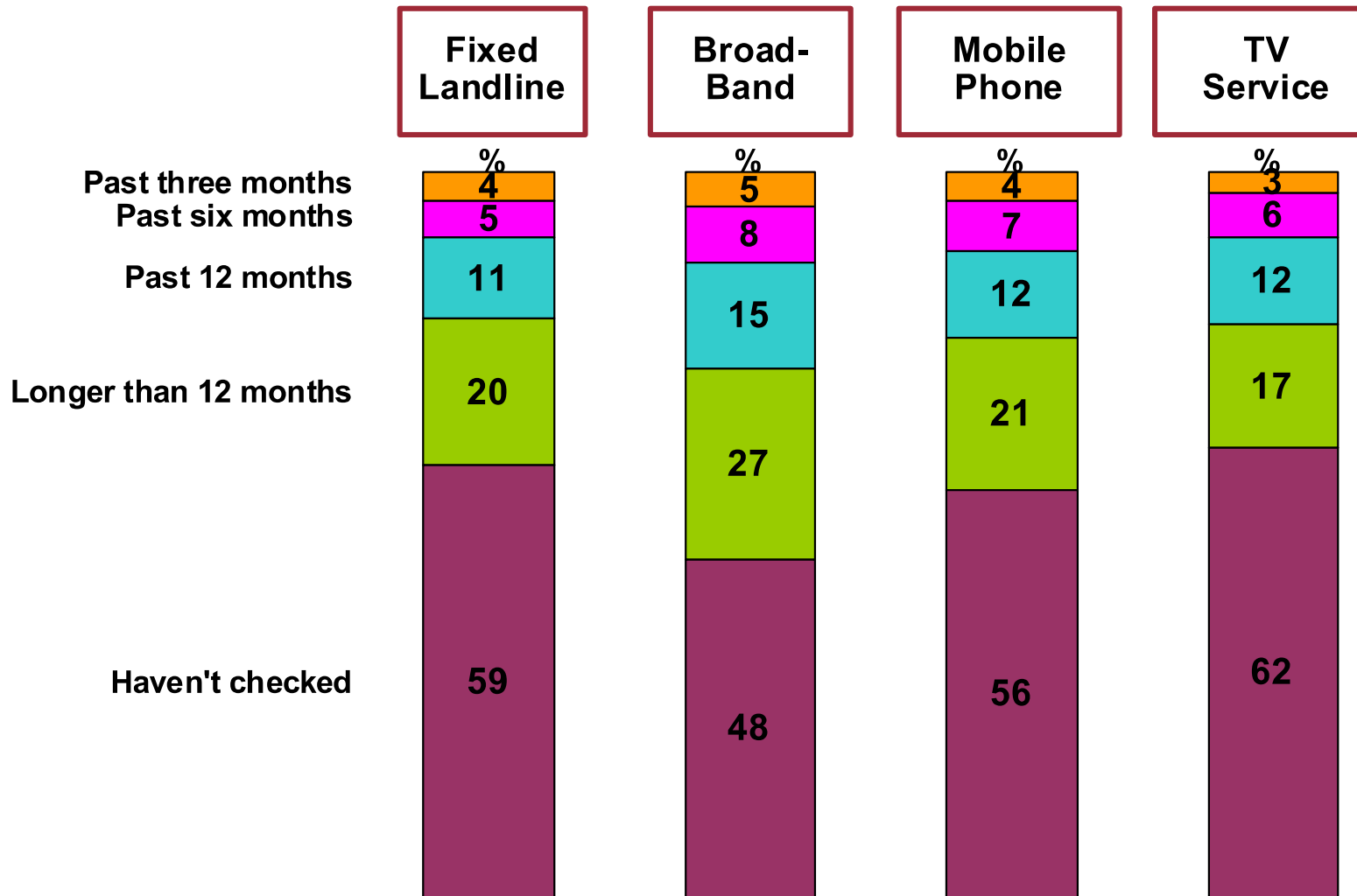
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Latest Occurrence of Checking Better Deals/Packages Available – II

(Base: All that have not switched provider within the past 12 months and not contract bound to provider)



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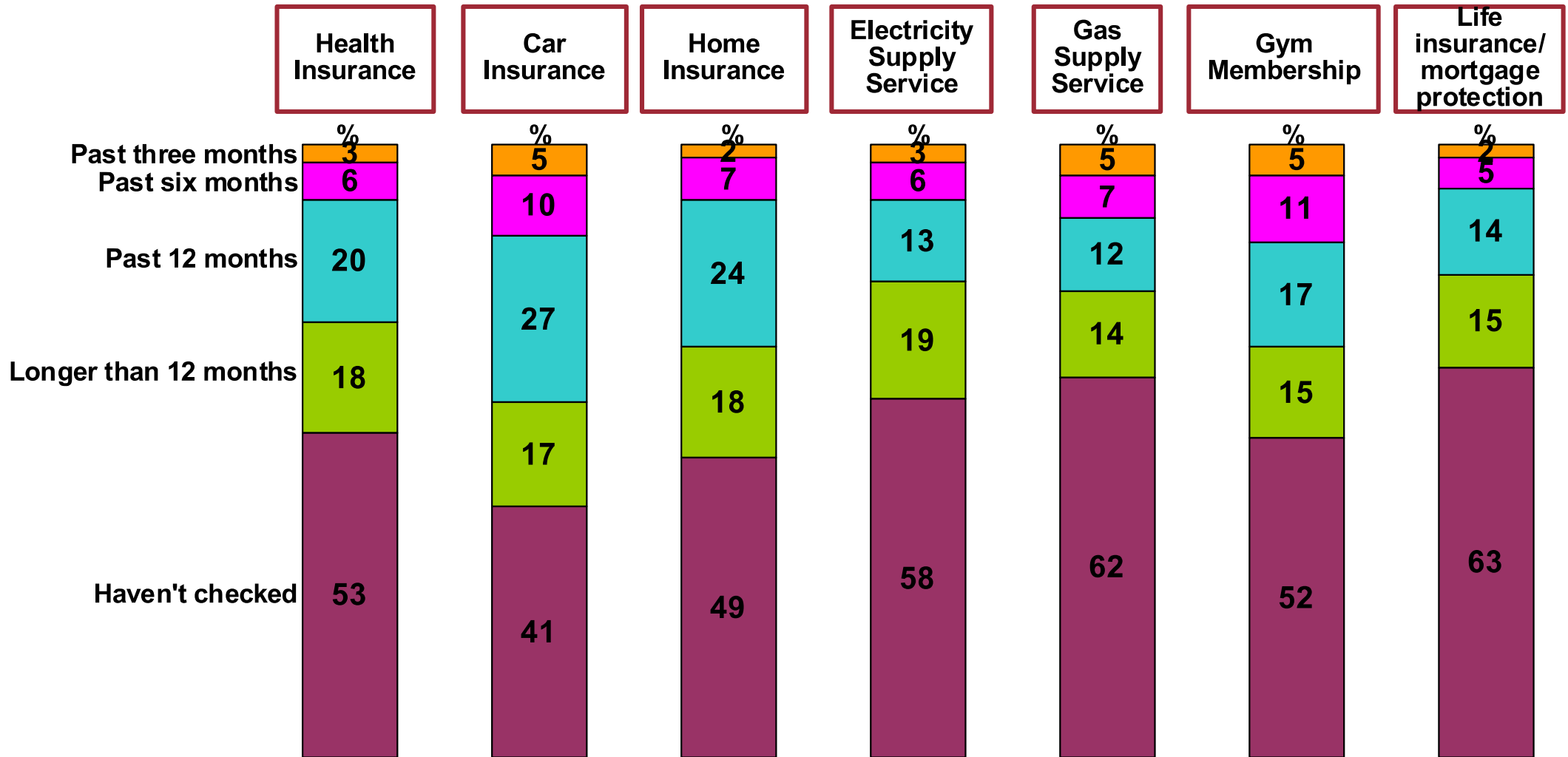
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Latest Occurrence of Checking Better Deals/Packages Available – III



(Base: All that have not switched provider within the past 12 months and not contract bound to provider)

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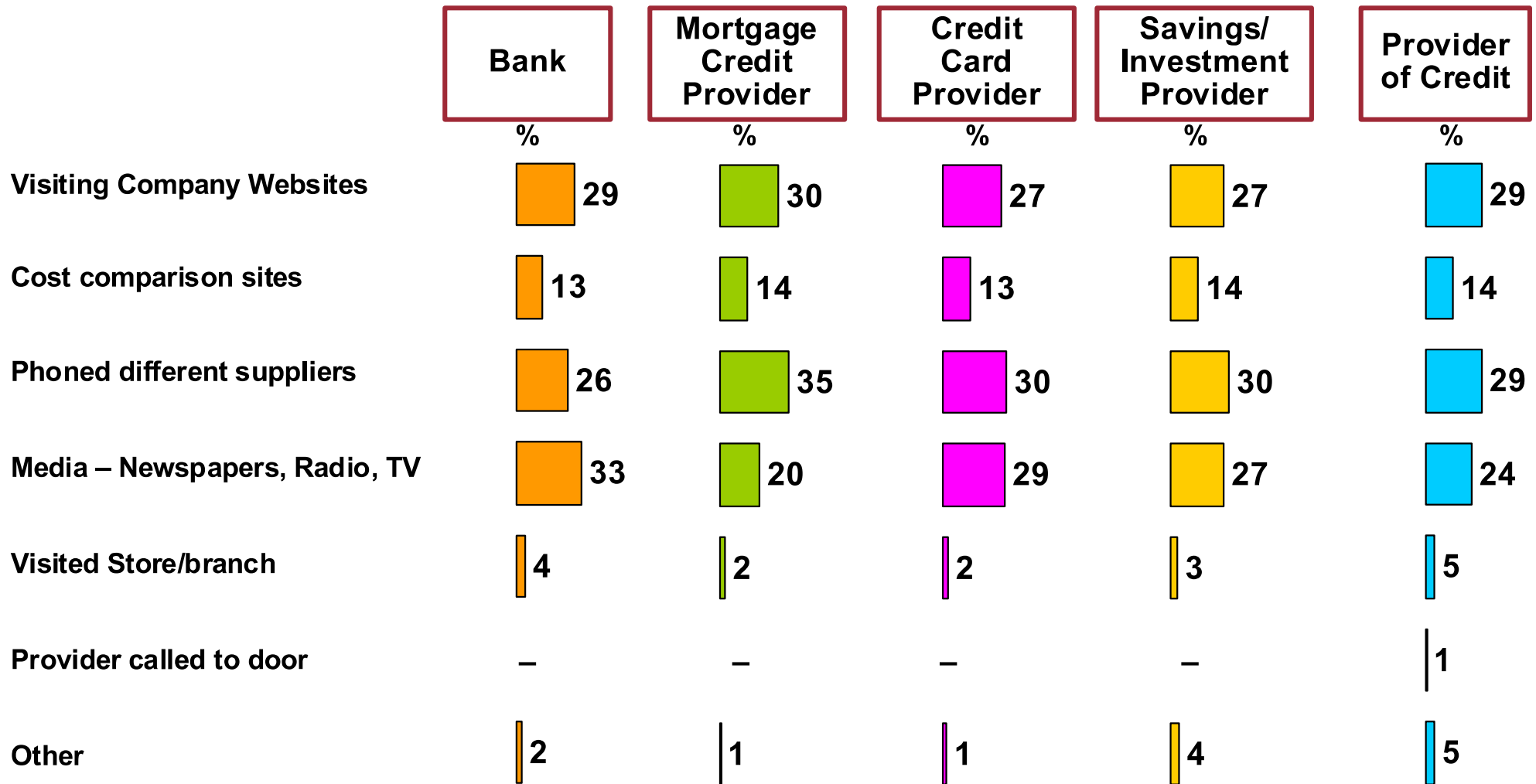
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How Deals/Packages are Checked – I



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(Base: All that have not switched provider within the past 12 months
& checked around)



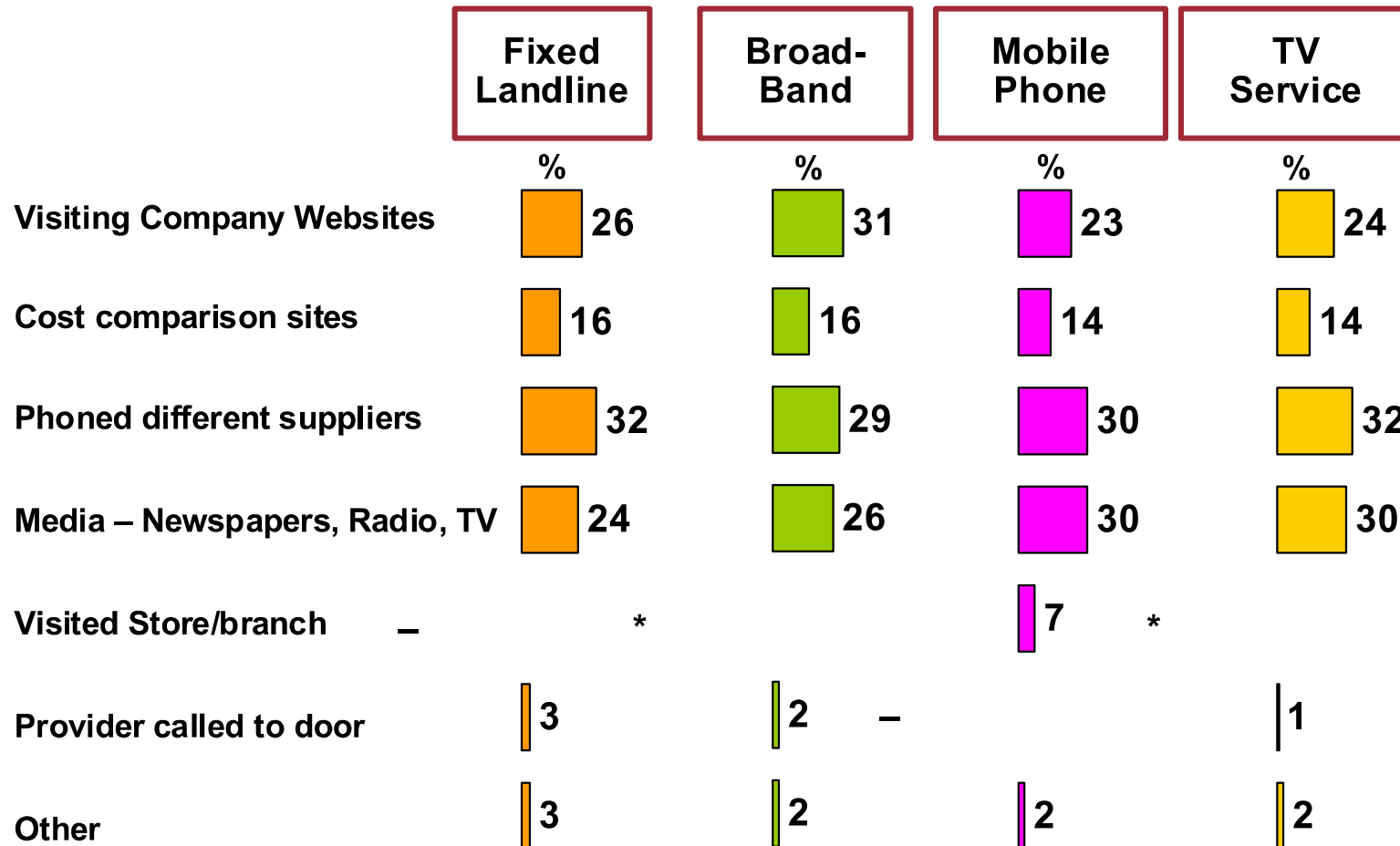
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How Deals/Packages are Checked – II



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(Base: All that have not switched provider within the past 12 months
& checked around)



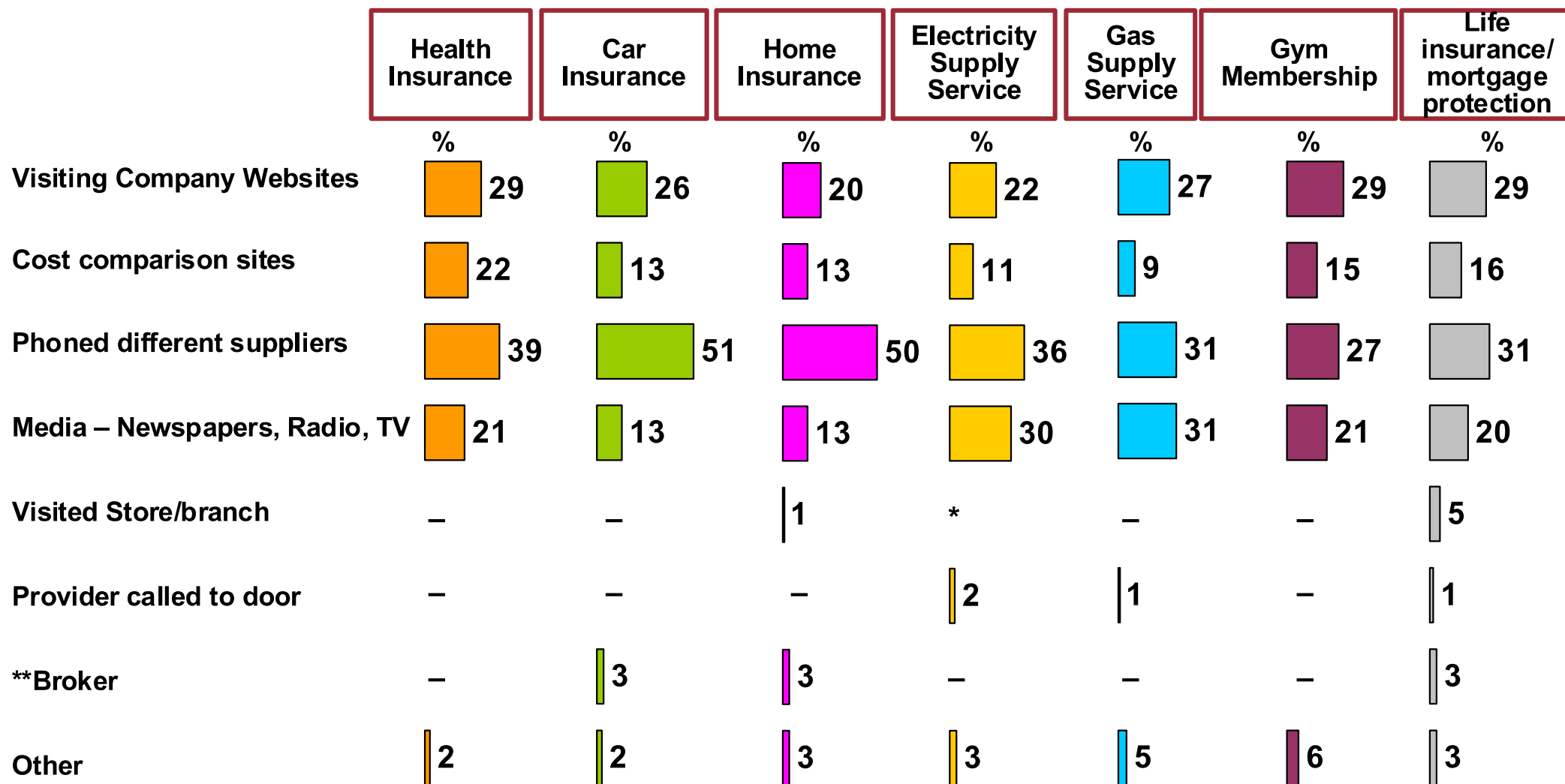
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How Deals/Packages are Checked – III



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(Base: All that have not switched provider within the past 12 months
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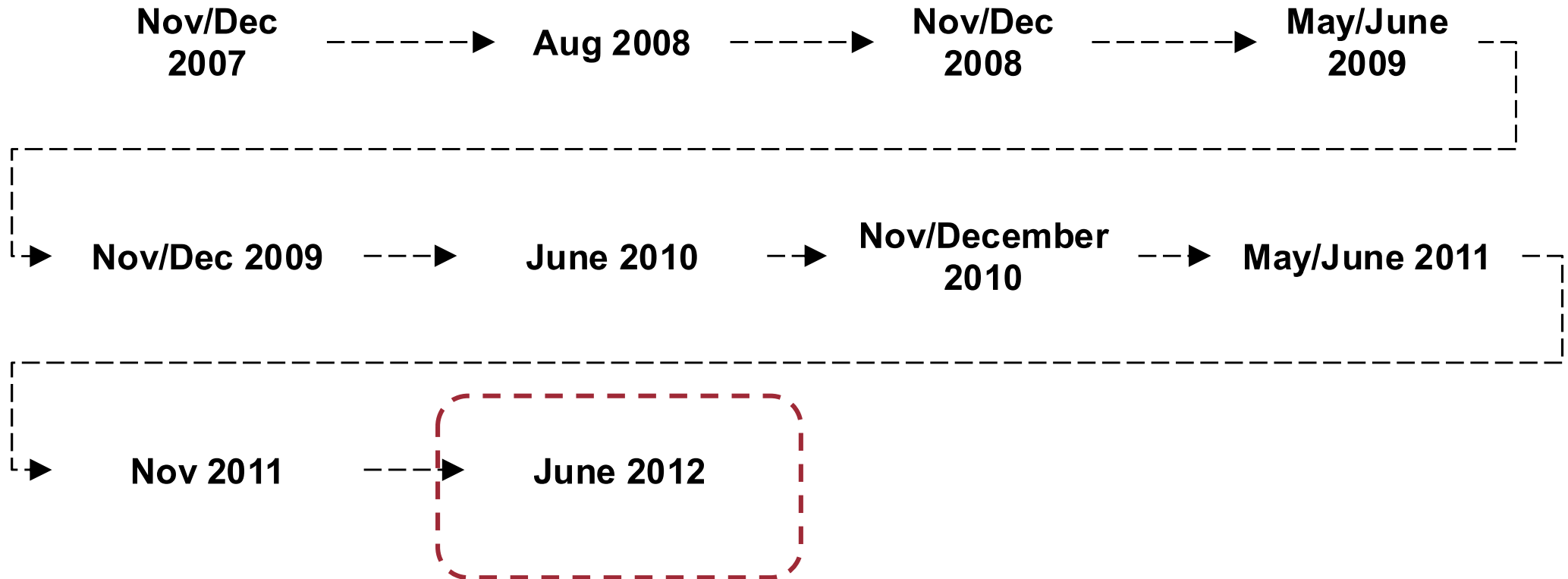
Research Background and Methodology

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A. Research Background and Methodology



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- The research was conducted by way of face-to-face interviewing of 1,002 people between the ages of 15-74.
- To ensure that the data is nationally representative, quotas were applied on the basis of age, gender and social class.
- Interviewing was conducted over a four week period in June 2012.

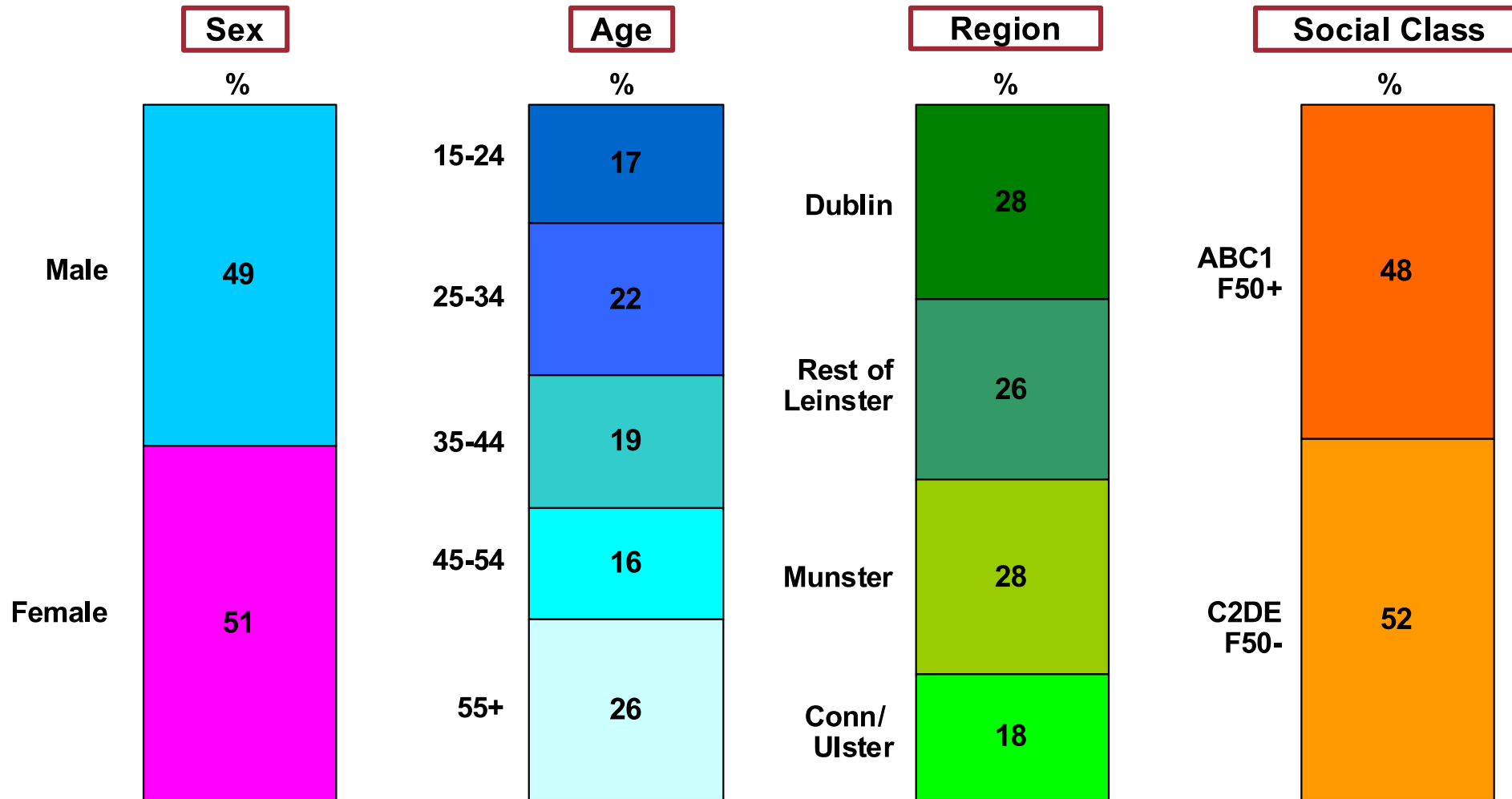
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B. Profile of Sample



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(Base: All aged 15-74 – 1,002)



Quotas were set on age, gender, region and social class to ensure that the sample was representative of the population.

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