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Household Consumer Perceptions of the energy market

Quarter 2 2021

Research conducted in May 2021

ofgem

citizens advice

Contents

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Summary of results

Summary of results

Overall satisfaction with supplier

- Around three quarters (73%) of consumers are satisfied with their energy supplier overall, which is consistent with Q1 2021 but somewhat lower compared to the latter half of 2020.
  - As with previous quarters, significantly fewer consumers who pay for their energy with a prepayment meter (PPM) (69%) or by standard credit (65%) are satisfied with their supplier overall compared to those paying by direct debit (75%).
  - Significantly more who have a smart meter are satisfied overall (76%) compared to those without (69%).

Customer service

- 71% of consumers are satisfied with the overall customer service provided by their supplier.
- 30% contacted their supplier in the past 3 months, with the main reasons for contact being to give a meter reading (25%), to raise a query about a bill (21%) or to ask a question about a meter (17%).
- Telephone remains the most commonly used contact channel (54%), followed by email (22%). Use of telephone to contact suppliers has declined since tracking commenced in Q4 2018, while use of email has increased.
- Ratings for satisfaction with telephone service (65% are satisfied) or online service (69% are satisfied) are steady between Q1 and Q2 2021 but are significantly down compared to the commencement of tracking in Q4 2018.
- Ratings for telephone response times are lower relative to most other areas of service. Just over half (52%) of consumers surveyed are satisfied with the time it takes to get through to someone who can resolve enquires made by telephone, while a third (34%) are dissatisfied.

Summary of results

Billing

- Consumers’ satisfaction with their bill has generally held steady over time. Around three quarters are satisfied with the ease of understanding (74%) or the accuracy of their bills (74%).
  - However, consumers with a long-term illness, physical or mental health problem or a disability have consistently expressed lower satisfaction with their bills compared to the GB average. 70% of consumers with a long-term illness, physical or mental health problem or a disability are satisfied with the ease of understanding their bill, while 69% are satisfied with the accuracy of their bills.
  - The main reason given for dissatisfaction with understanding of bill is that it is unclear how the bill is calculated (75%).

Complaints handling

- In this quarter, 4% of all consumers said they had contacted their supplier about a complaint in the past 3 months, which is similar to previous quarters. The three main reasons for complaining are: billing issues (31%), problems with smart meters (23%) or the cost of energy (22%).
- Satisfaction levels with complaints handling processes and outcomes is an area where ratings have been consistently lower compared to all other dimensions of service. While around two thirds (65%) are satisfied with the outcome of their complaint, more are dissatisfied than satisfied with the complaints handling process.
  - This quarter, over half are dissatisfied with the way their complaint was handled (53%) and the time taken to deal with the complaint (53%). Nearly a quarter (23%) had given up pursuing the complaint.

Summary of results

Supplier debt management processes

- Just under three in five (57%) consumers who have fallen into arrears or run out of credit on their PPM had contact with their supplier to get help – this is similar to Q1 (61%).
- While the majority agreed they were treated fairly by their supplier (60%), that the person spoken to was sympathetic (62%) and that the options provided to help manage bills were helpful (53%), around one in five disagreed with each of these statements.

Switching processes

- Satisfaction with switching processes remains high. Nearly all (85%) are satisfied with the process overall while four in five (79%) are satisfied with the ease of comparing suppliers.
- Consistent with the previous quarter, around two thirds of consumers who switched supplier used a price comparison website (PCW) (64%).
- The use of PCWs appears to improve the switching experience. Significantly more consumers who used a PCW are satisfied with the ease of comparing and the process overall compared to those who did not.

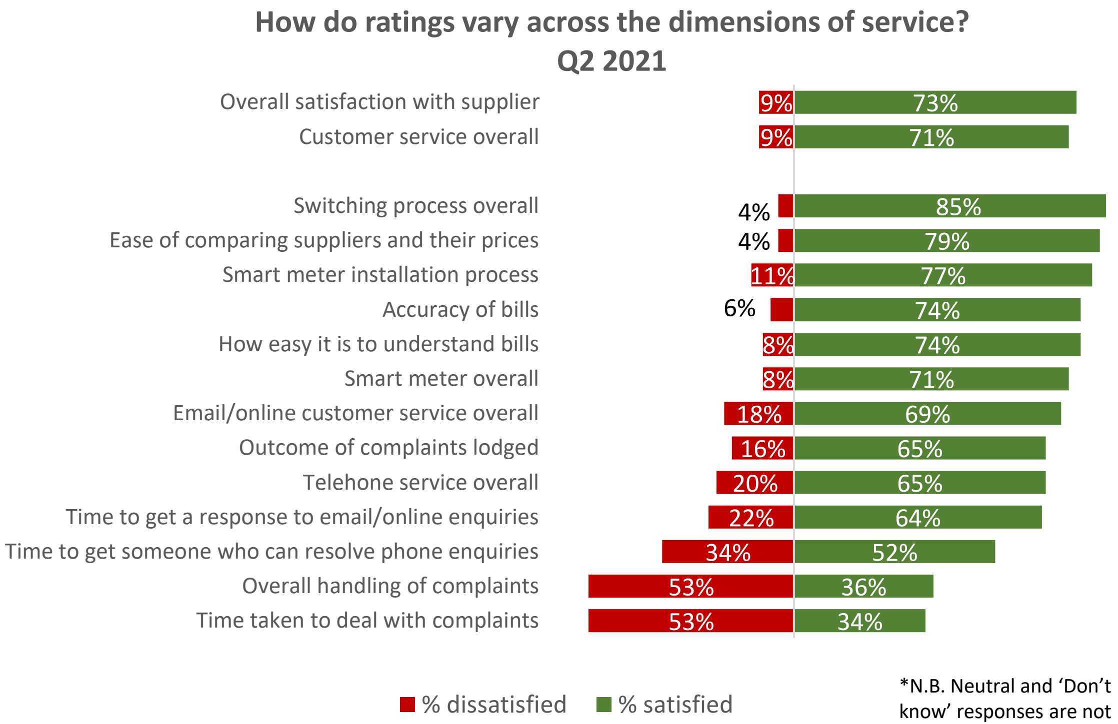
Smart meters

- Around half (52%)of consumers say they have a smart meter, with 15% stating it was installed in the last 6 months.
- Three quarters (77%) of those who had their smart meter installed in the last 6 months are satisfied with the installation process but fewer (71%) are satisfied with the meter overall.

Summary of results

Relative performance of the different dimensions of service

- This chart summarises how suppliers perform across the different dimensions of service.
- Switching processes, smart meters and billing are the highest rated aspects of service.
- Complaints handing processes are rated poorly, with more dissatisfied than satisfied customers.
- Note that a third of consumers who contacted their supplier by telephone are dissatisfied with the time it takes to resolve their query. Dissatisfaction has increased over the past 4 quarters, from 27% in Q3 2020 to 34% in Q2 2021.



*N.B. Neutral and 'Don't know' responses are not shown

Please refer to the individual pages in this report for the question text and the base sizes for each metric shown on this chart.

Background and method

Background

- This report presents findings from a tracking survey commissioned jointly by Ofgem and Citizens Advice.
  - The Gas and Electricity Markets Authority (GEMA) is the regulator of Britain's gas and electricity markets, and its principal objective is to protect the interests of both current and future consumers. Ofgem carries out the day to day functions of GEMA.
  - Citizens Advice helps millions of people every year to find a way forward, across all sectors, whatever their problems. This informs its role as the statutory energy consumer advocate, fighting for the best outcomes for current and future consumers.
- The tracker is a representative survey of domestic energy bill-payers and provides Ofgem and Citizens Advice with ongoing measures of consumer engagement in, and experiences of, the energy market.

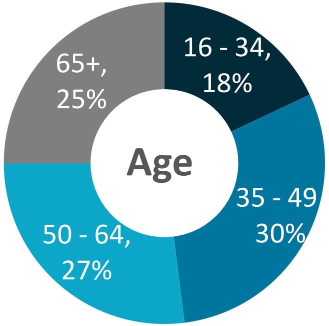
Research methodology

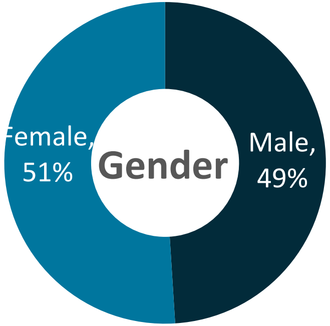
- Data is usually collected using a mixed-mode survey of domestic energy bill-payers in Great Britain (GB), including 2,900 online interviews and 300 face to face interviews. The latter are conducted to reach consumers who don't have access to the internet.
- However, in the light of the coronavirus outbreak, the face to face interviews were not conducted this quarter. Face to face interviewing for this survey in future quarters will only recommence when guidance from the Government Social Research profession changes to confirm that it is safe to do so.
- Fieldwork was carried out in May 2021 via an online survey sourcing respondents from a commercial online market research panel (n = 3,203).
- All participants were responsible (solely or jointly) for the energy bills in their household or for choosing their energy supplier.

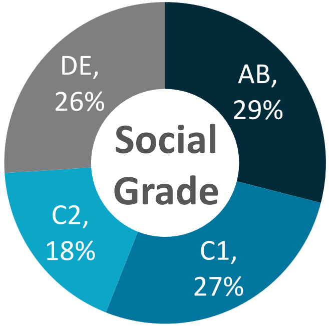
* https://www.nomisweb.co.uk/datasets/st067

Sample profile

- The survey uses quotas to achieve a sample representative of the GB bill-payer population. Quotas are set on age, gender, social grade and region. Data is weighted to the known profile of the GB population. Quotas (other than gender) were based on census Household Reference Person (HRP)*, as a proxy for bill-payer.







 Base: All Participants (3,203)

Fieldwork dates

- Fieldwork dates for each of the 11 waves of the survey completed are indicated below:

Fieldwork	Wave 1 ('Q4 2018')	Wave 2 ('Q1 2019')	Wave 3 ('Q2 2019')	Wave 4 ('Q3 2019')	Wave 5 ('Q4 2019')	Wave 6 ('Q1 2020')	Wave 7 ('Q2 2020')	Wave 8 ('Q3 2020')	Wave 9 ('Q4 2020')	Wave 10 ('Q1 2021')	Wave 11 ('Q2 2021')
Online	24th October – 11th November 2018	29th January – 6th February 2019	26th March - 15th April 2019	3rd July - 17th July 2019	1st – 23rd October 2019	6th - 22nd January 2020	1st - 17th April 2020	21st August – 16th September 2020	20th November – 15th December 2020	5th – 20th February 2021	5th – 20th May 2021
Face-to-Face*	24th October – 13th November 2018	31st January – 17th February 2019	1st – 16th April 2019	1st July – 23rd July 2019	3rd – 17th October 2019	9th - 24nd January 2020	1st - 24th April 2020	24th August – 28th September 2020	24th November – 14th December 2020	None	None

*Wave 7 ('Q2 2020') and part of Wave 8 ('Q3 2020') were conducted by telephone

Comparisons between survey waves

- This report presents results for the eleventh tracking wave (Q2 2021).
- As the survey involved sampling a selection of energy consumers (rather than the whole population), confidence intervals apply to the results. These confidence intervals indicate the degree of confidence we can have that the survey result is real and not due to random chance for a given sample size and a given survey result. For the total sample on which these results are based (n=3,203), there is a confidence interval of +/-2% (i.e. a survey result of 50% could lie between 48% and 52%).
- Confidence intervals also apply when comparing results between waves. Where there are statistically significant differences in findings compared to previous waves (i.e. we have statistical confidence that a real change has occurred), these are indicated. Where only wave 11 results are shown, there are no statistically significant differences in findings from previous waves.
- All measures of statistical significance have been tested at the 95% confidence level.

Abbreviations/terms used in this report

Tariffs / Payment:

- Fixed = Consumer is on a fixed tariff for their electricity and gas.
- SVT = Consumer is on a Standard Variable Tariff for their electricity and gas.
- Mixed tariff = on different types of tariff for gas and electricity.
- Dual Fuel = Consumer uses the same supplier for electricity and gas.
- PPM = Pre-Payment Meter.

Demographics:

- SEG = Socio-Economic grade.
- ABC1 = Consumers falling into the top three socio-economic bands.
- C2DE = Consumers falling into the bottom three socio-economic bands.
- Online = Survey sample sourced from an online consumer panel.

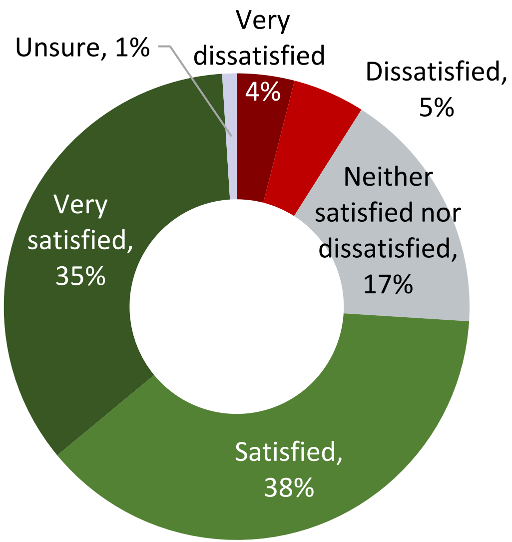
Other:

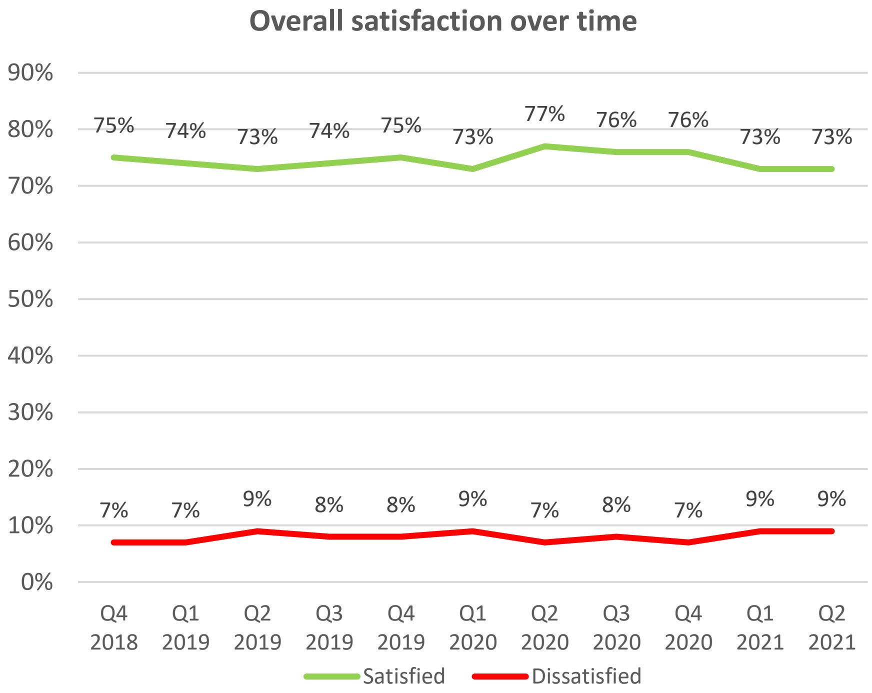
- PCW = Price Comparison Website.
- PPS = Percentage points.

Satisfaction with supplier

Overall satisfaction with supplier

73% of the consumers surveyed are satisfied with their supplier – unchanged from Q1 2021, although still lower compared to much of 2020.





Overall, how satisfied or dissatisfied are you with (...) as your supplier of (gas/electricity/gas and electricity)?

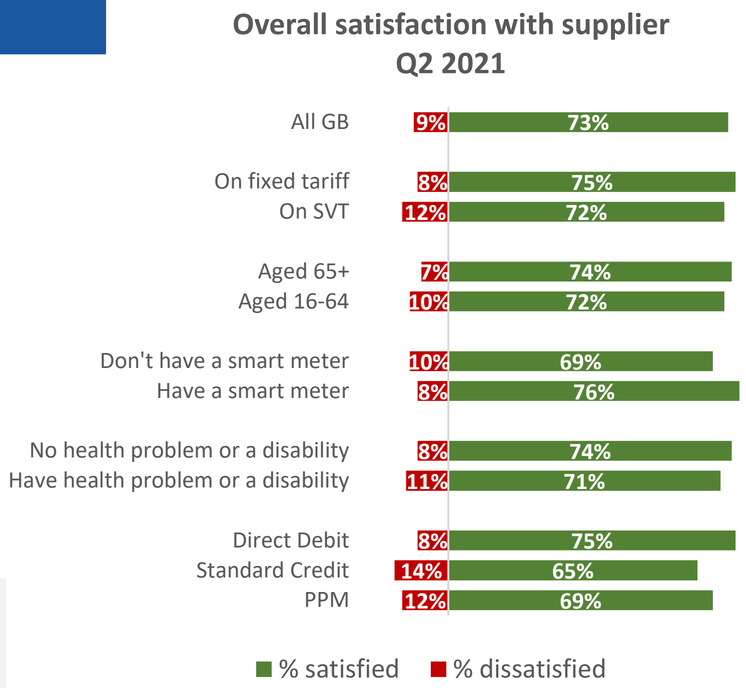
Base: All Participants (3,203)

Overall satisfaction with supplier by demography

Consumers with a smart meter, on a fixed tariff or who pay by direct debit have higher levels of satisfaction than their counterparts.

- Over time, there have been consistent trends in the types of customers who express lower levels of satisfaction with their supplier. The chart to the right shows overall satisfaction ratings for Q2 2021 by demography, but the differences shown have been apparent each wave of this tracker.
- Fewer consumers paying by PPM, paying by standard credit, on an SVT or without a smart meter are satisfied overall compared to the overall average in Great Britain, and more are dissatisfied. By age, more consumers aged 16-64 are dissatisfied compared to those aged 65+.
- Consumers who are less satisfied overall with their supplier are generally also less satisfied with each of the dimensions of service.

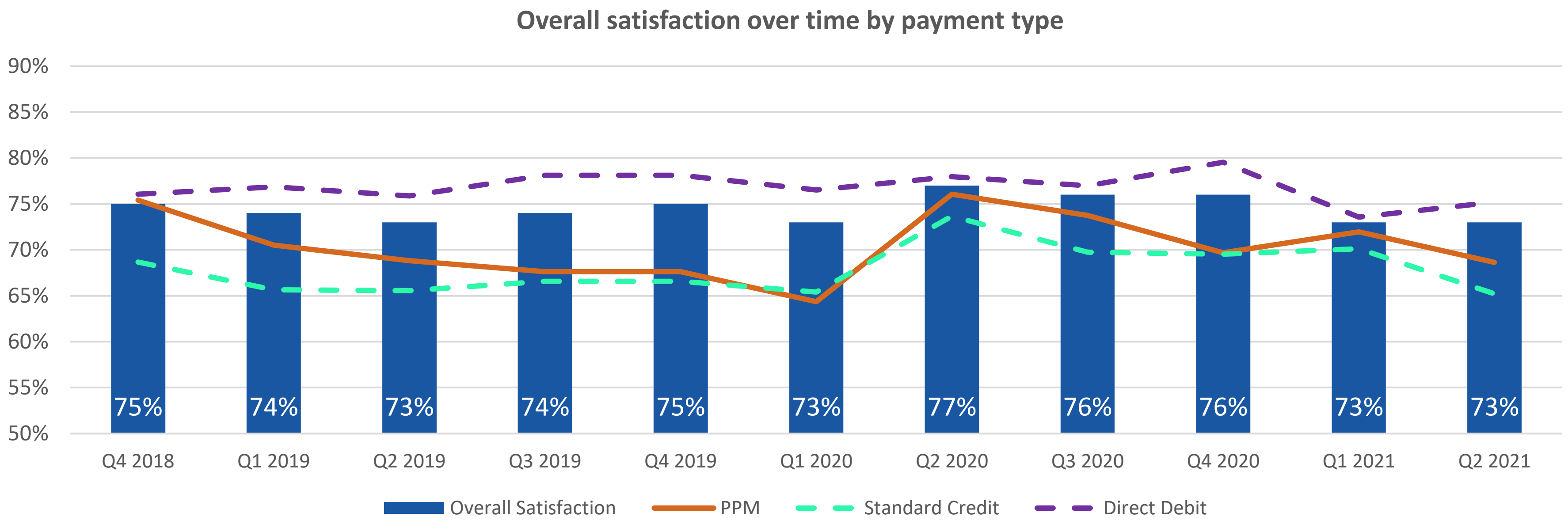
The following two slides show the trends over time by payment type (a key differentiator of satisfaction) and among those who do and don't have a long-term illness, physical or mental health problem or a disability (a group who may have unique customer service and accessibility needs).



Overall, how satisfied or dissatisfied are you with (...) as your supplier of (gas/electricity/gas and electricity)?
Base: All Participants (3,203). Base sizes vary from 371-2,213 for individual demographics

Overall satisfaction by payment type

Satisfaction among those with a PPM or who pay by standard credit has been consistently lower compared to those who pay by direct debit.



Overall, how satisfied or dissatisfied are you with (...) as your supplier of (gas/electricity/gas and electricity)?
Base: All Participants (Range 3,053-3,300 per quarter); PPM (Range 519-634 per quarter); Standard Credit (Range 317-431 per quarter); Direct Debit (Range 2,218-2,422 per quarter)

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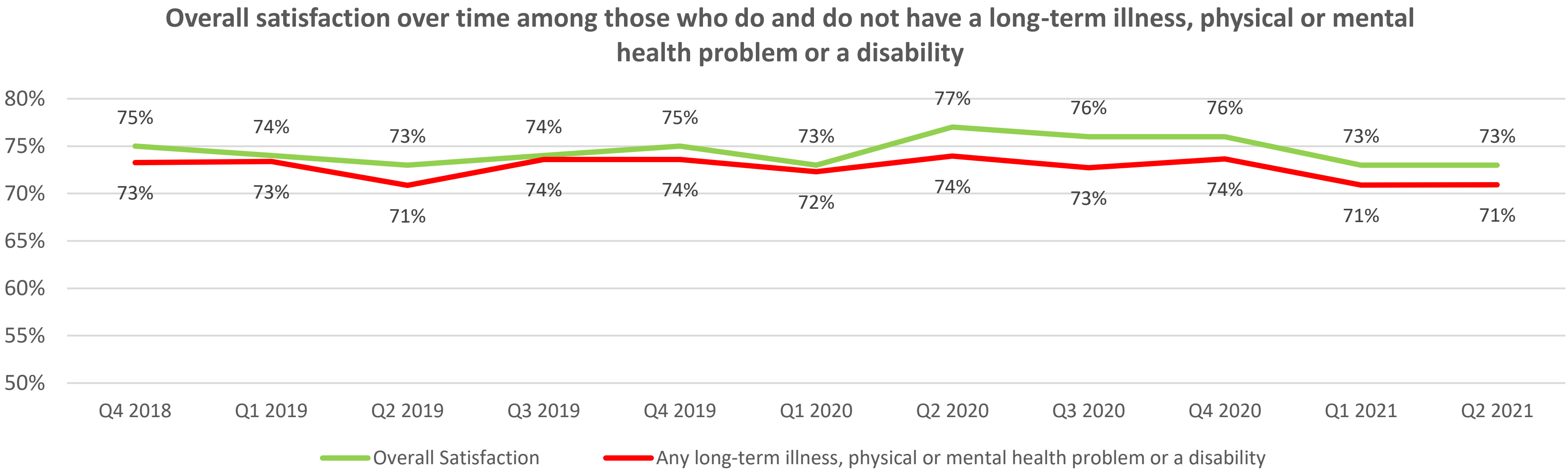
Overall satisfaction among those with and without a long-term illness, physical or mental health problem or a disability

While the differences aren't always statistically significant, customers who have a long-term illness, physical or mental health problem or a disability tend to return lower satisfaction ratings compared to those without.



Overall, how satisfied or dissatisfied are you with (...) as your supplier of (gas/electricity/gas and electricity)?

Base: All Participants (Range 3,053-3,300 per quarter); Those with any long-term illness, physical or mental health problem or a disability (Range 752-953 per quarter)

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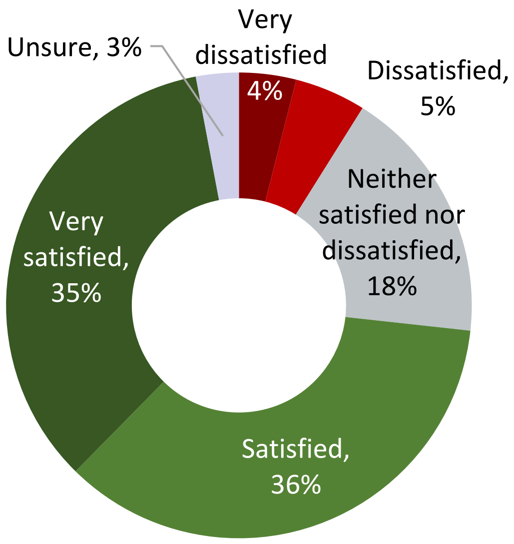
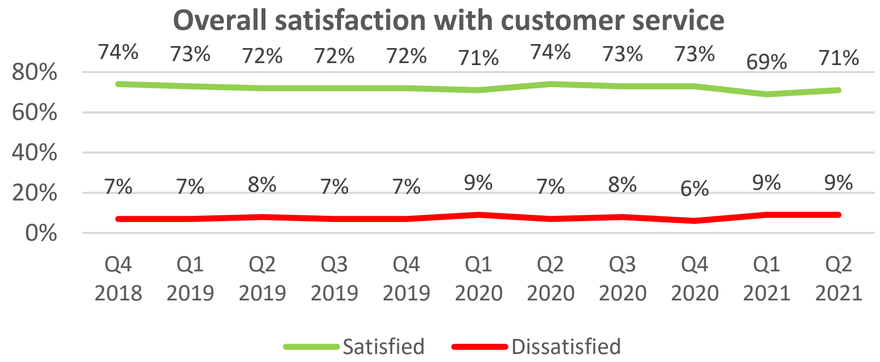
Satisfaction with customer service

71% are satisfied with customer service which is similar to Q1 2021.





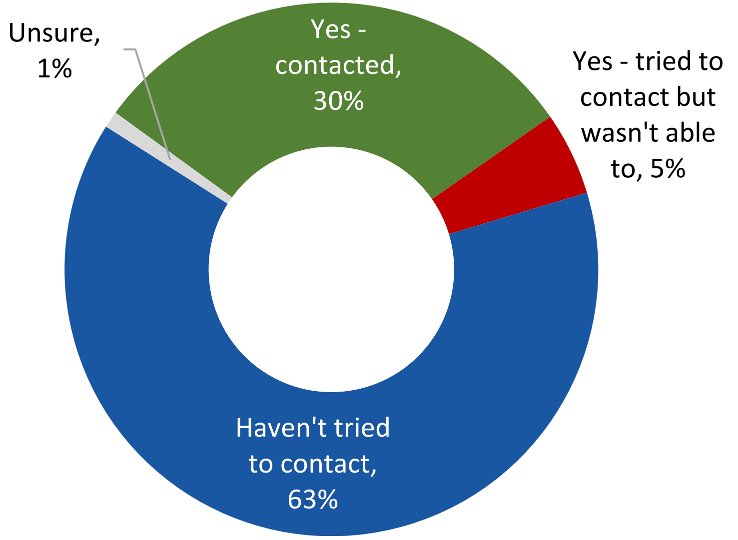
- Consistent with previous quarters, satisfaction with customer service is higher among those using a smart meter (75% vs. 67% of those without).
- More consumers with a long-term illness, physical or mental health problem or a disability are dissatisfied (11%) compared to those without (7%).

Overall, how dissatisfied or satisfied are you with the customer service you have received from your energy supplier?

Base: All Participants (3,203)

Reason for contact with supplier (last 3 months)

Similar to previous quarters, 30% contacted their supplier in the last three months, while 5% tried to make contact but were unable to. Rates of unsuccessful contact have not significantly changed during the COVID-19 pandemic.

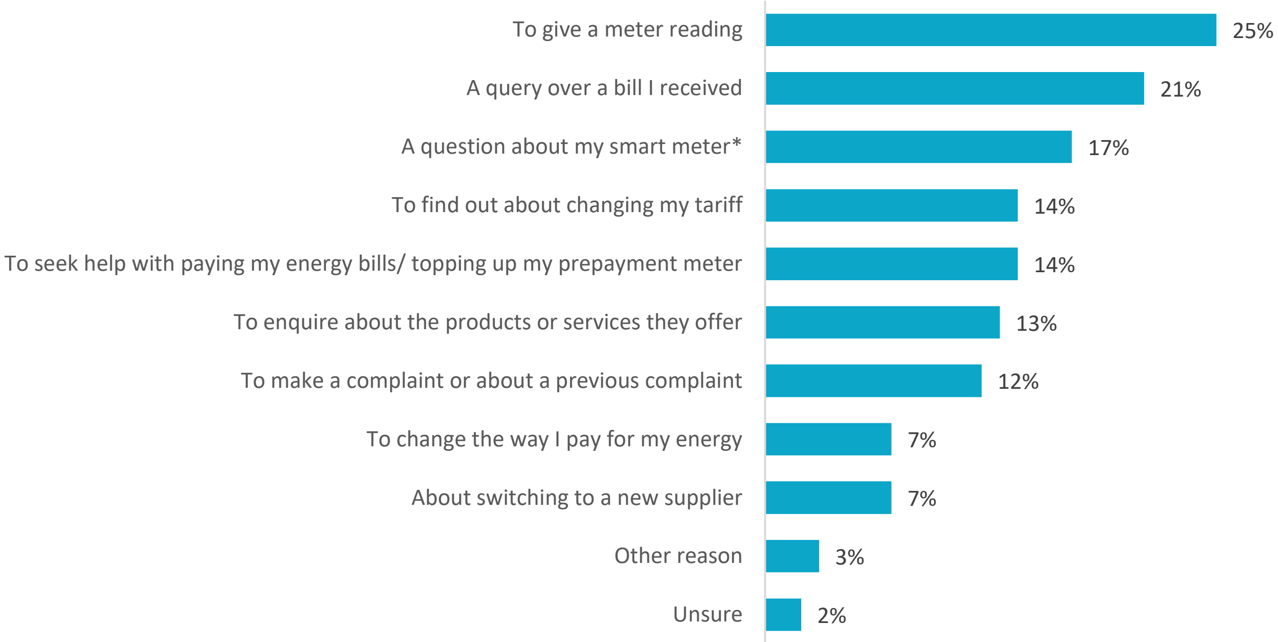


Have you contacted, or tried to contact, your energy supplier within the last 3 months?
Base: All Participants (3,203)

- In Q2 2021, those most likely to contact their supplier are customers who:
  - Are dissatisfied with their supplier (50%)
  - Switched in past 12 months (41%)
  - Are aged 16-34 (38%).
- And those most likely to have tried but failed to contact their supplier are those who:
  - Are dissatisfied with their supplier (16%)
  - Aged 16-34 (12%)
  - Pay by standard credit (11%).

Reasons for last contacting supplier

Giving meter readings and billing enquiries remain the most common reasons for contact.



*Contact relating to smart meters will include all forms of contact (e.g. installations, ongoing use, changing smart meter etc)

Thinking of the last time you (made/tried to make) contact with your energy supplier, what was it about?

Base: Those who contacted / tried to contact their energy supplier (1,144)

Reasons for contacting supplier by payment method

PPM customers tend to contact about help with paying bills or topping up; while those paying by direct debit tend to contact to give meter readings or with billing queries.

	Payment method		
	Any using standard credit	Any using PPM	Any using Direct debit
To give a meter reading	18%	11%	30%
A query over a bill I received	30%	17%	21%
A question about my smart meter	16%	20%	17%
To find out about changing my tariff	12%	13%	15%
To seek help with paying my energy bills/with topping up my prepayment meter	19%	29%	9%
To enquire about the products or services they offer	15%	17%	12%
To make a complaint or about a previous complaint	16%	16%	10%
To change the way I pay for my energy	13%	8%	7%
About switching to a new supplier	11%	4%	7%

*Highlighted percentages are statistically significant

Statistically higher than non-highlighted cells

- Those paying by PPM are the most likely to contact about seeking help with paying bills (29% - similar to Q1 2021, 30%).
- Those paying by PPM are more likely to have made a complaint than those paying by direct debit.
- Those paying by direct debit are more likely to contact about a meter reading.
- Those paying by standard credit are more likely to contact about a query on a bill than those paying by direct debit.

Recent contact with supplier: contact channel

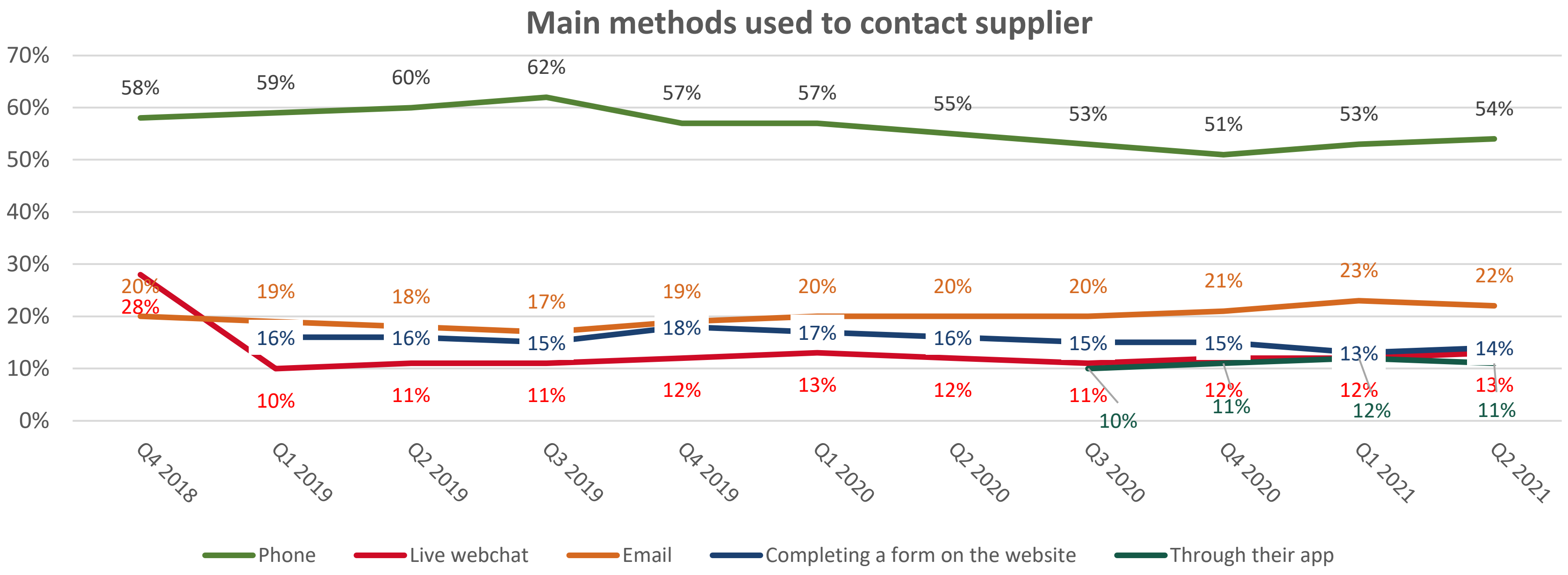
Of the 30% that contacted their supplier within the last 3 months, over half (54%) did so by phone. Over a fifth (22%) did so via email.

- Regardless of demography, telephone is the most common contact method. However, there is some variation in which channels are used:
  - Younger consumers aged 16-64 are more likely to contact via phone (60%) compared to those aged 65+ (39%).
  - Those aged 65+ are the age group most likely to use a website form (27%) (although they still most commonly contact by phone).

How did you (try to) make contact with your energy supplier on that last occasion?
Base: All who contacted or have tried to make contact in the last 3 months (1,144)

Contact channels used over time

Telephone remains the most common contact channel, followed by email.

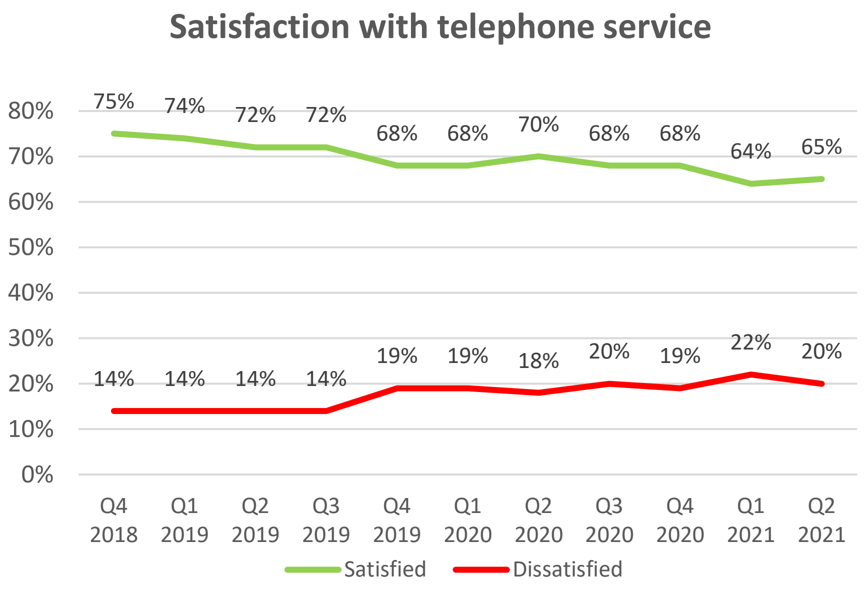


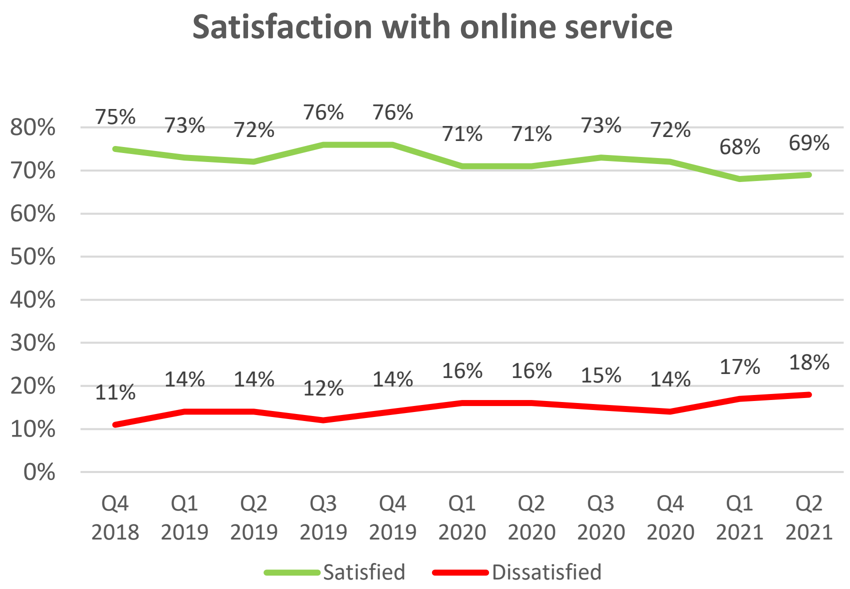
How did you (try to) make contact with your energy supplier on that last occasion?

Base: All who contacted or have tried to make contact in the last 3 months (Sample sizes range from 994 to 1144 per quarter) Mentions over 10% in Q1 2021 shown in chart.

Satisfaction with phone and email service

Satisfaction with telephone and online service stabilised this quarter after significant drops in Q1 2021.



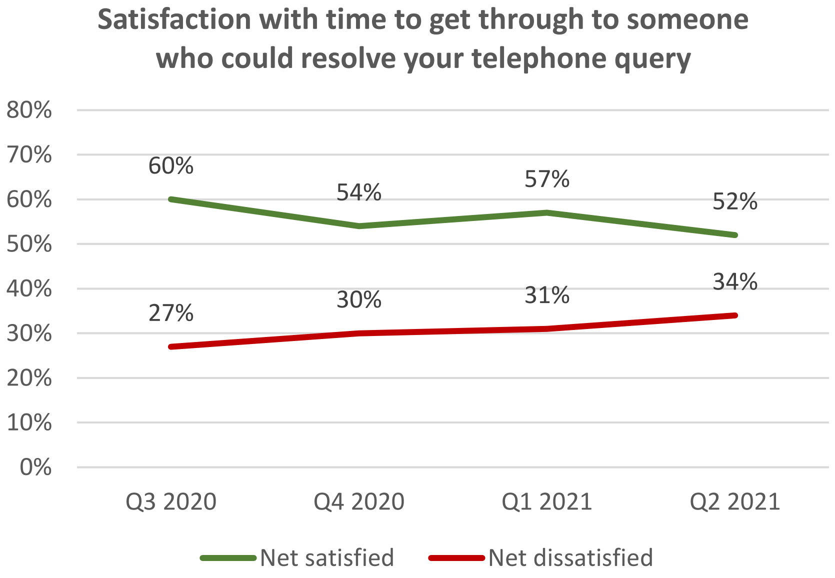


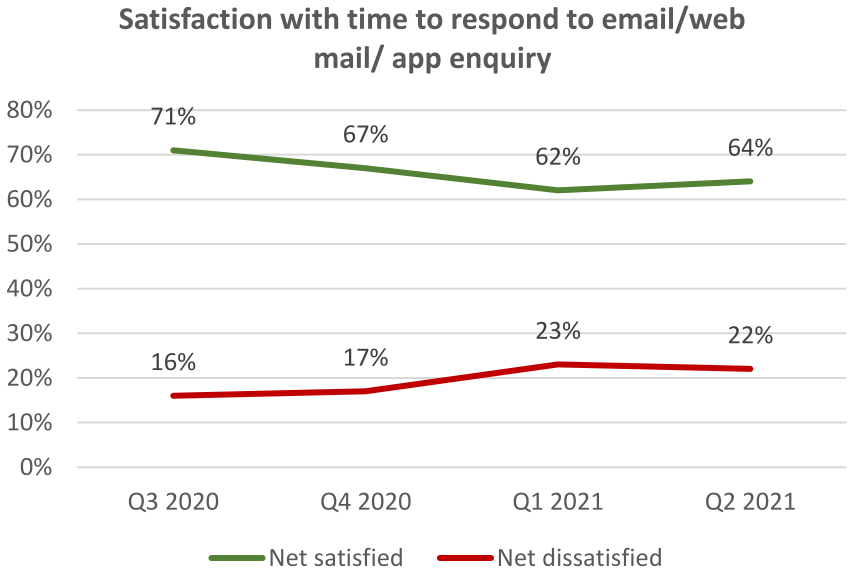
Please can you tell me how dissatisfied or satisfied you were with the service received by phone? Base: All who contacted or tried to contact their supplier by phone in the last 3 months (Base: 538 - 651)

Please can you tell me how dissatisfied or satisfied you were with the service received online? Base: All who contacted or tried to contact their supplier by email/webchat/website form/app in the last 3 months (Base: 411 – 569)

Satisfaction with response times

Satisfaction with response times is lower relative to other dimensions of service. Dissatisfaction with telephone response times has been increasing over time, while the downward trend for satisfaction with response times to email or online enquires has stabilised.





Please can you tell me how dissatisfied or satisfied you were with the following: The time it took to get through to someone who could resolve your query
Base: All who contacted or tried to contact their supplier by phone in the last 3 months (Base: 538 - 651)

Please can you tell me how dissatisfied or satisfied you were with the following: The time it took for your supplier to respond to you query
Base: All who contacted or tried to contact their supplier by email/webchat/website form/app in the last 3 months (Base: 411 – 569)

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Association of contact with satisfaction with supplier

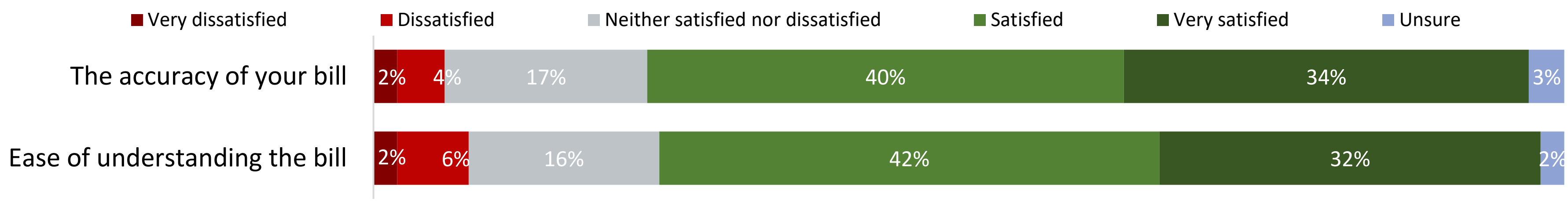
There is an association between having to contact a supplier and being overall dissatisfied with the supplier.

- 15% of those who contacted their supplier in the past three months are dissatisfied overall, compared to 5% among those who have not.
- In particular, significantly more of those making a complaint or making a billing enquiry are dissatisfied with their supplier.

Overall, how satisfied or dissatisfied are you with (...) as your supplier of (gas/electricity/gas and electricity)?
Base: All Participants (3,203); those who contacted supplier (974). Base size for reason for contact varies from 75-281.
* P3M = Past three months

Satisfaction with bills

Around 3 in 4 are satisfied with the accuracy and ease of understanding bills.

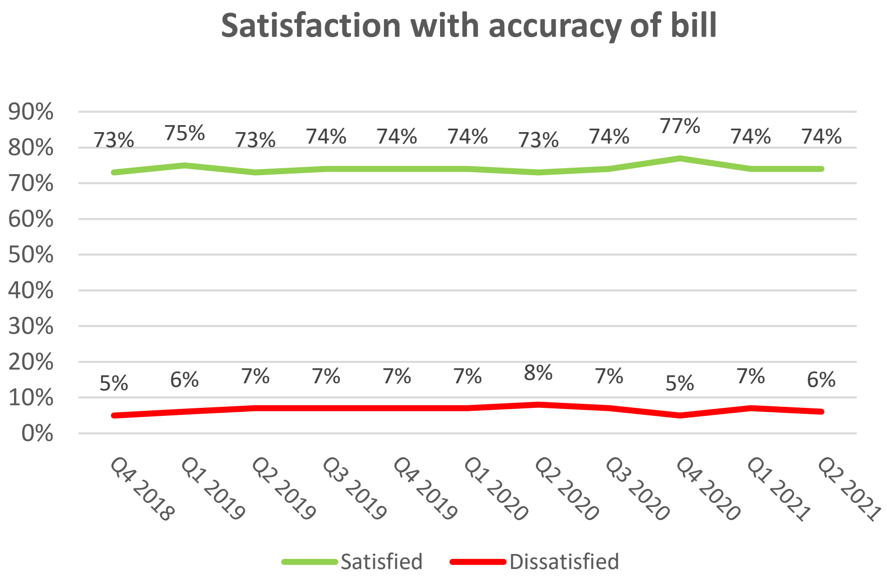


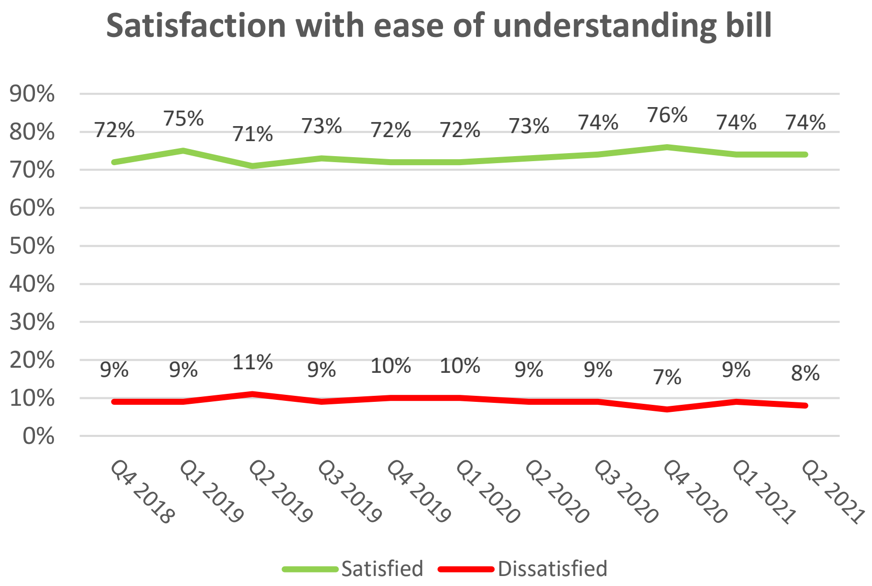
Please can you tell me how dissatisfied or satisfied you are with the following aspects of your energy supplier's bills?

Base: Those who pay for their energy with a regular direct debit or standing order or with cash/cheque/credit card/BACS/App (2,641)

Satisfaction with bill over time

Satisfaction with billing is generally stable (apart from an improvement in Q4 2020, which has not been sustained).





Please can you tell me how dissatisfied or satisfied you are with the following aspects of your energy supplier's bills?

Base: Those who pay for their energy with a regular direct debit or standing order or with cash/cheque/credit card/BACS/App (c 2,700 each wave)

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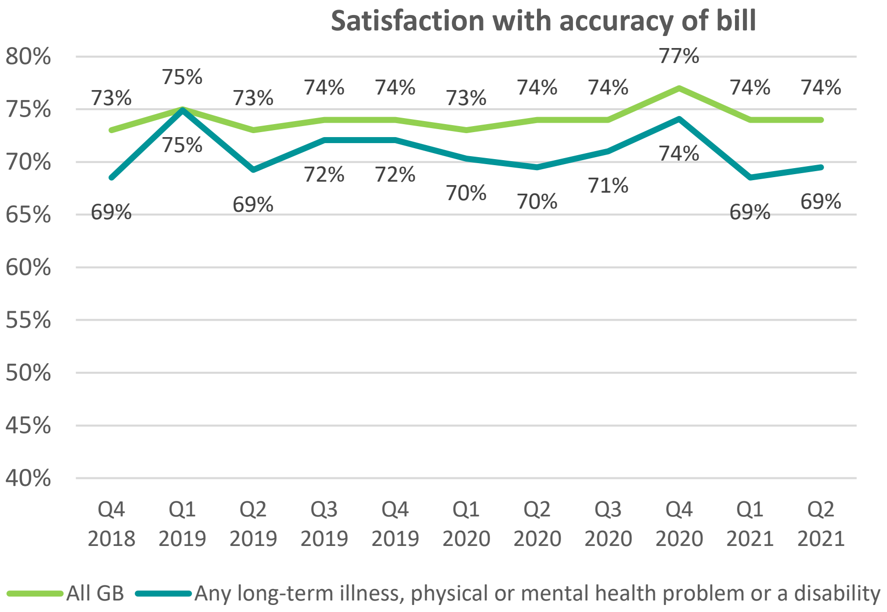
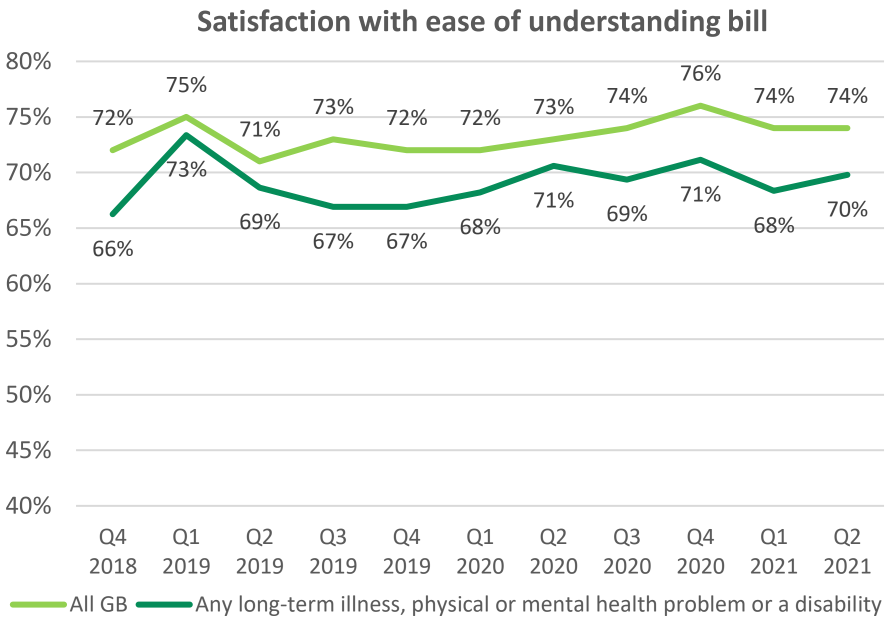
Satisfaction with billing among those with a long-term illness, physical or mental health problem or a disability

Fewer consumers with a long-term illness, physical or mental health problem or a disability are satisfied with their bills.





Q37r1. Please can you tell me how dissatisfied or satisfied you are with the following aspects of (...)`s bills: Ease of understanding the bill
Base: Those who pay with a regular direct debit or standing order or with cash/cheque/credit card/BACS/App (Range 2,573-2,969 per quarter); Those with any with a long-term illness, physical or mental health problem or a disability (Range 594-728 per quarter)

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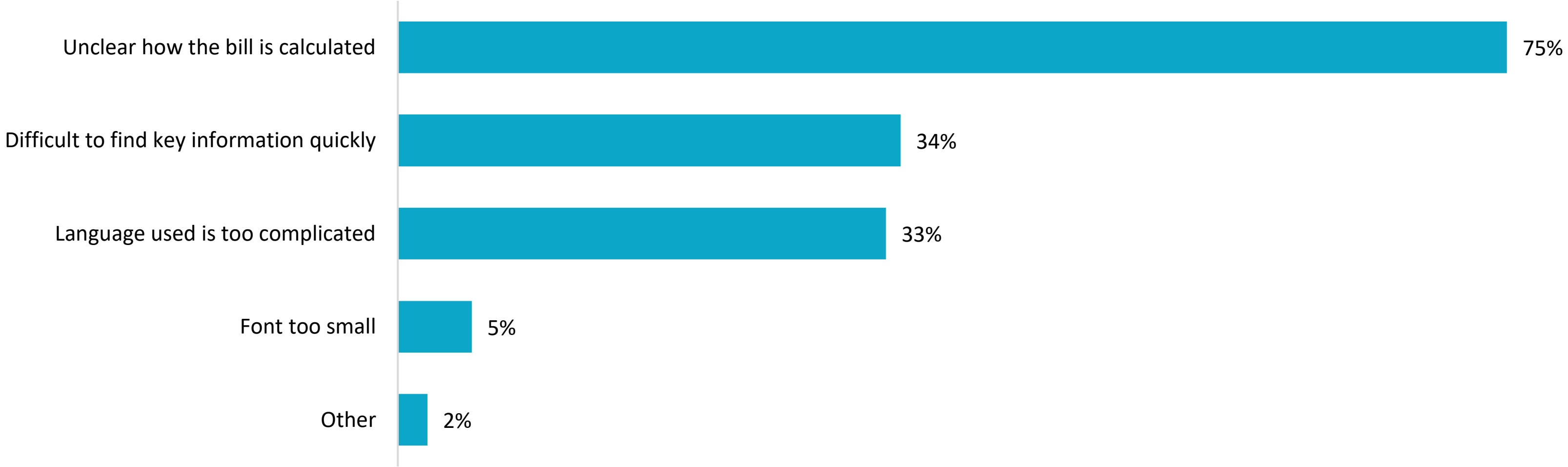
Reasons for dissatisfaction with understanding the bill

As seen in previous quarters, clarity of calculation of bill continues to be the most common problem. This is the most common issue across all demographic groups and all suppliers.



Why are you very dissatisfied/dissatisfied with the ease of understanding your bill from your energy supplier?

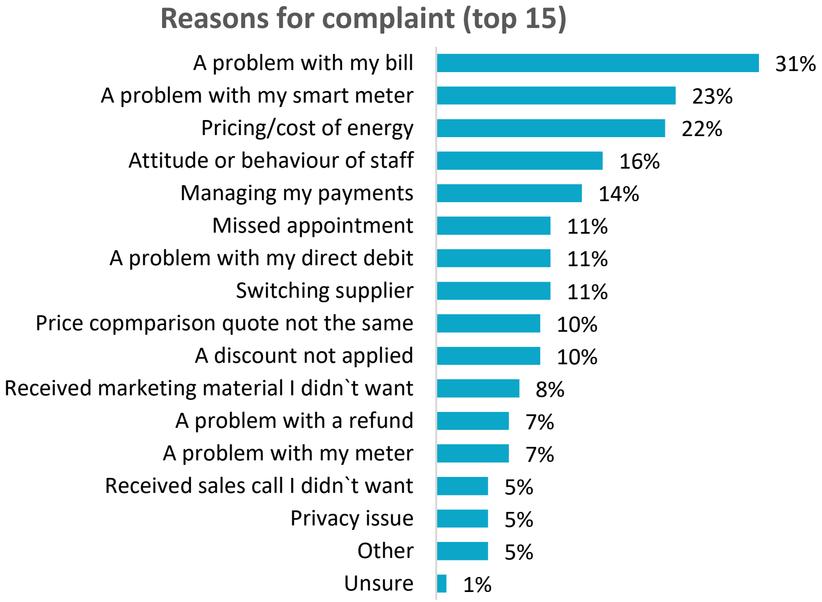
Base: Those who are dissatisfied with the ease of understanding their bill from their energy supplier (212)

Complaints

Complaints to suppliers

12% of recent contacts with suppliers were related to a complaint. This equates to 4% of all consumers complaining the last time they contacted their supplier (similar to previous quarters).

- As in previous quarters, the groups more likely to have complained (of all participants) are:
  - Dissatisfied overall with their supplier (18%) vs satisfied (2%) or neutral (11%)
  - Younger consumers: 16-34 (8%).



Earlier you said that your last contact with your energy supplier was about a complaint. What was the complaint about?

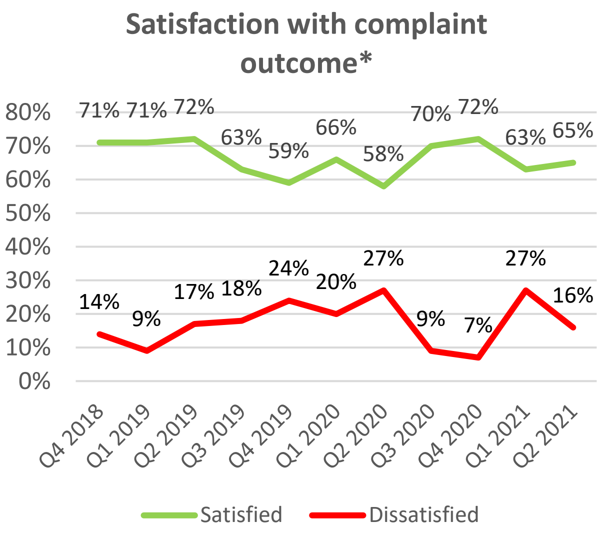
Base: Those who contacted / tried to contact their energy supplier about a complaint (134)

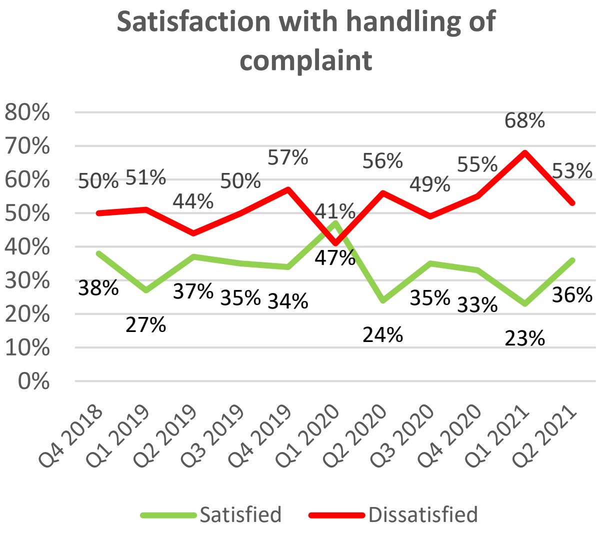
Satisfaction with the complaints process

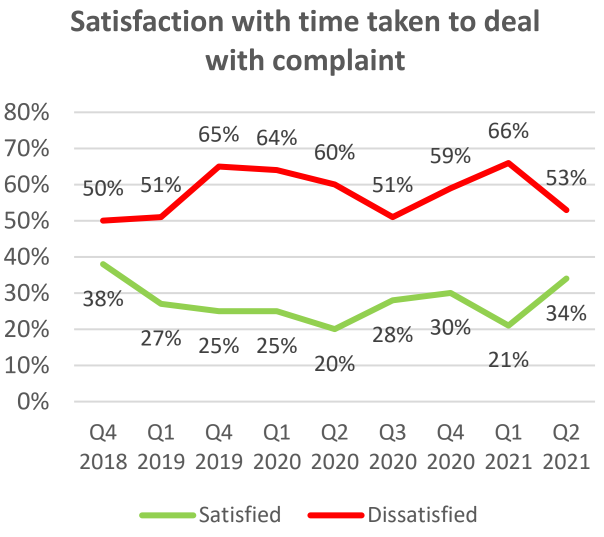
Around two thirds are satisfied with the outcome of their complaint, while those who are dissatisfied has fallen.

Dissatisfaction with the handling of complaints is significantly lower than in Q1 2021, and is now in line with previous quarters.

Satisfaction with the time taken to deal with complaints has increased this quarter though more remain dissatisfied than satisfied.







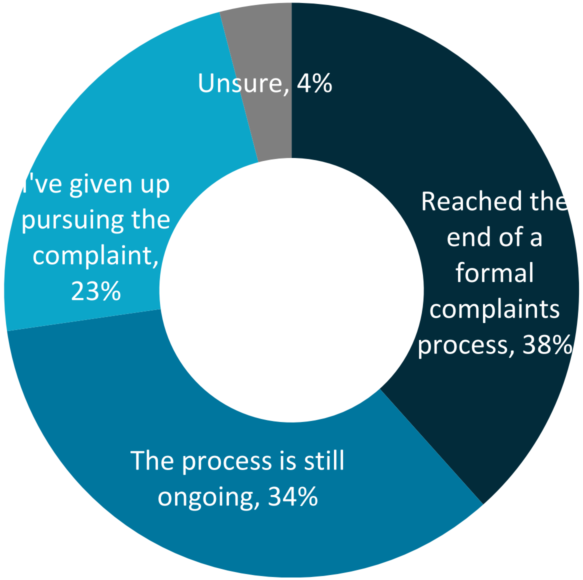
Please can you tell me how satisfied or dissatisfied you are with the following aspects of your complaint.
Base: Those who contacted their energy supplier to make a complaint Q4 2020 (104) ; All other waves (96-111)
***Note small base sizes**: Those whose complaint reached an outcome Q4 2020 (36); All other waves (33-46)

*N.B. Neutral and 'Don't know' responses are not shown

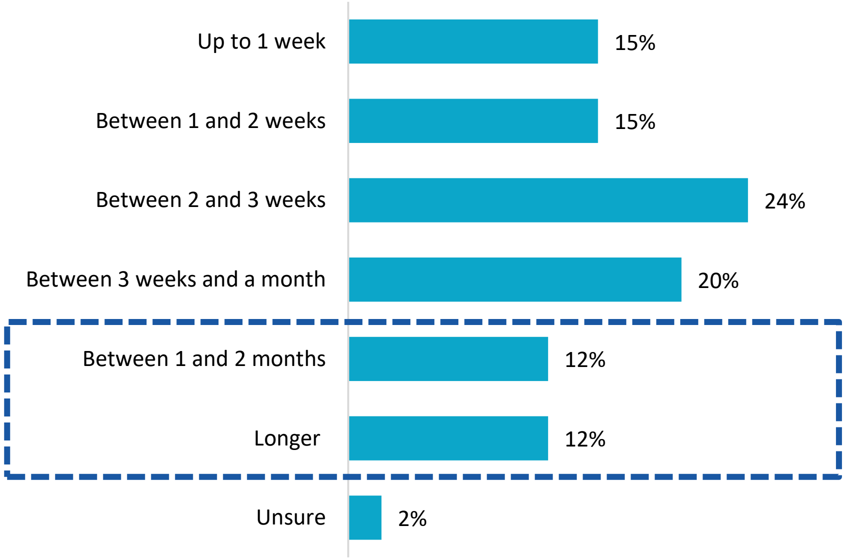
Stage of complaint and time taken to process

38% of complaints have been formally completed (higher than Q1 2021 – 25%).

24% of complaints have been live for over 1 month.



What stage are you at with the complaint process?
Base: Those who contacted their energy supplier to make a complaint (134)



Roughly, how long did the complaint process take from beginning to end?
Base: Those who knew the stage of their complaint process (127)

Accent

Supplier debt management processes

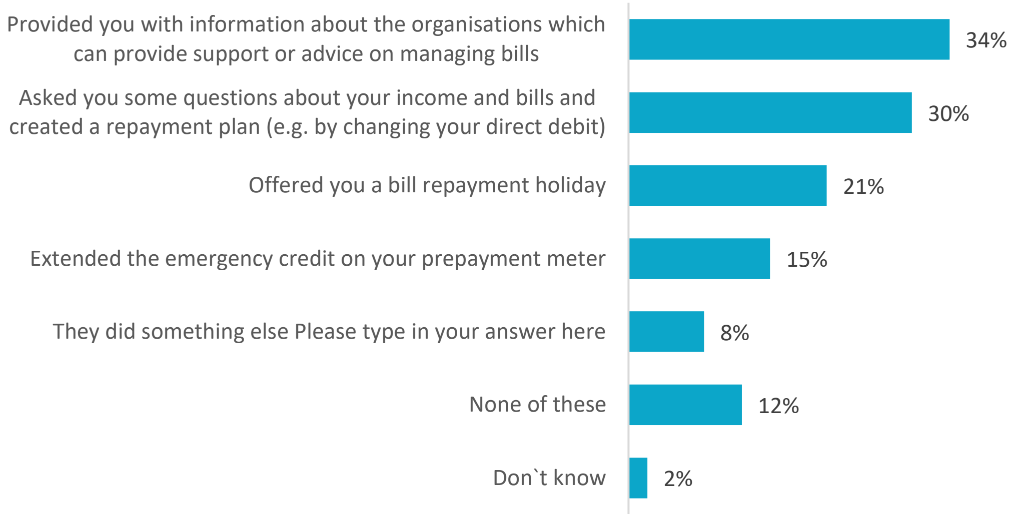
Supplier support for customers who have fallen behind on bills

Around three in five who are in arrears or who self-disconnected have had contact with their supplier to seek support.

We asked consumers who had run out of credit on their PPM or fallen behind on bills if they had contact with their energy supplier to ask for help:

- 57% of consumers had contact, including 43% who contacted their supplier themselves and 14% who were contacted by their supplier.
- These are similar proportions compared to Q1 2021: 61% of consumers had contact in Q1, of which 43% contacted their supplier themselves and 17% were contacted by their supplier.

What support is offered by suppliers to assist with paying energy bills?



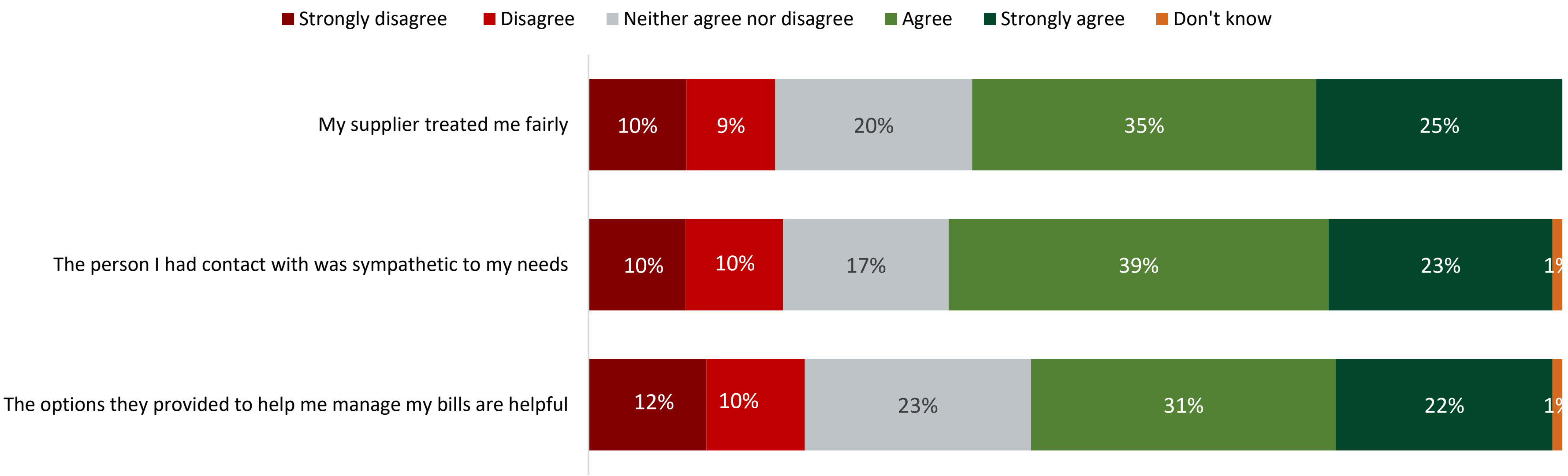
Have you been in contact with your energy supplier to ask for help with paying your bills? Base: All households running out of credit on PPM or running behind on energy payments (523)

When you had contact with your energy supplier about your bills, did they do any of the following? Base: All households contacting energy suppliers about running out of credit on PPM or running behind on energy payments (301)

Accent

Supplier support when having issues paying bills

A majority of those receiving support felt the contact was sympathetic, fair and helpful.



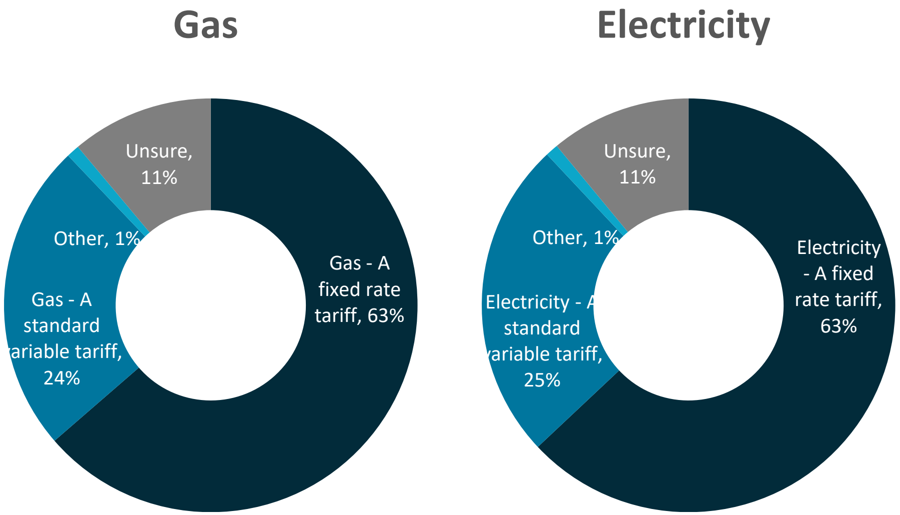
To what extent do you agree or disagree with the following statements about the contact you've had with your energy supplier about paying your bills:

Base: All households contacting energy suppliers about running out of credit on PPM or running behind on energy payments (301)

Tariffs and information provision

Tariff type

88% of gas and electricity customers know what tariff type they are on.



- Consistent with previous quarters, those who are **unsure** are most likely to be:
  - PPM customers
  - Have never switched supplier
  - Have a long-term illness, physical or mental health problem or a disability
  - From lower social grades.

% unsure which tariff they're on	Gas	Electricity
Payment method:		
Direct Debit	11%	12%
PPM	25%	23%
Standard Credit	8%	7%
Switching status:		
Ever Switched	6%	6%
Never Switched	17%	17%
Health/Disability status:		
Any long-term illness, health problem or disability	16%	15%
No long-term illness, health problem or disability	9%	9%
Socio-economic grade:		
ABC1	7%	7%
C2DE	16%	15%

What kind of gas / electricity tariff are you on?

Base: Gas (2,770), Electricity (3,062)

Recall of information from suppliers

Recall of information has increased this quarter, significantly so for: notifications of a price increase, information about the range of tariffs offered, information about how to improve the energy efficiency of homes, what to do to change tariffs and whether a cheaper tariff is available.

% recalling information from suppliers	Q4 2019	Q1 2020	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021
Notification of a price increase	49%	45%	56%	50%	49%	52%	64%↑
The choice of energy tariffs they offer	45%	42%	47%	48%	48%	47%	52%↑
What to do in an emergency (e.g. a gas leak or faulty meter)	43%	42%	53%	47%	50%	47%	50%
What to do if you need assistance with paying your energy bills	38%	38%	48%	47%	47%	46%	49%
How to improve energy efficiency in your home and reduce your energy consumption	Not asked	38%	47%	42%	45%	42%	47%↑
How to make a complaint	42%	42%	49%	44%	44%	44%	46%
What to do if you want to change your energy tariff	40%	39%	44%	43%	44%	41%	46%↑
Whether a cheaper tariff to the one you are on is available	Not asked	Not asked	Not asked	38%	38%	34%	38%↑
What information you need to compare energy prices	32%	31%	36%	35%	35%	33%	37%
What to do if your supplier can't resolve your complaint and you need to escalate it	Not asked	Not asked	Not asked	32%	33%	32%	34%
Base size	3,209	3,228	3,053	3,202	3,209	3,200	3,203

Do you recall if your energy supplier has given you information about any of the following in the last six months?
Base: All participants

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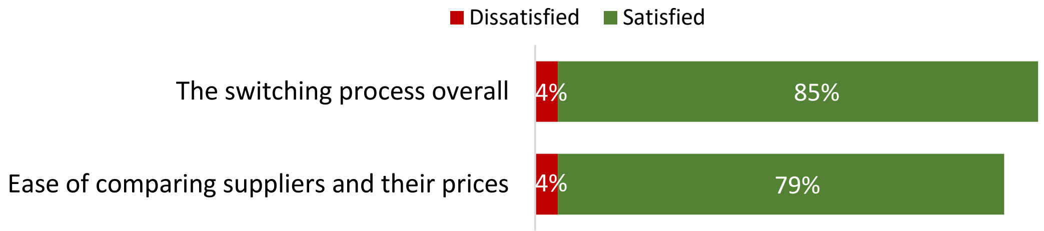
Switching

Satisfaction with the switching experience

There is high satisfaction with the switching process and the ease of comparing suppliers and their prices (consistent with previous quarters).



- Satisfaction with switching remains higher among those who used a price comparison website.

	Satisfied with **ease of comparing suppliers and prices**	Satisfied with **the switching process overall**
Did not use a PCW	67%	81%
Used a PCW only to compare suppliers	85%	88%

- Those paying by direct debit tend to be more satisfied (87% with the process overall and 81% with ease of comparing suppliers).
- Whereas those with a long-term illness, physical or mental health problem or a disability tend to be less satisfied (72% with ease of comparing suppliers and 81% the process overall).

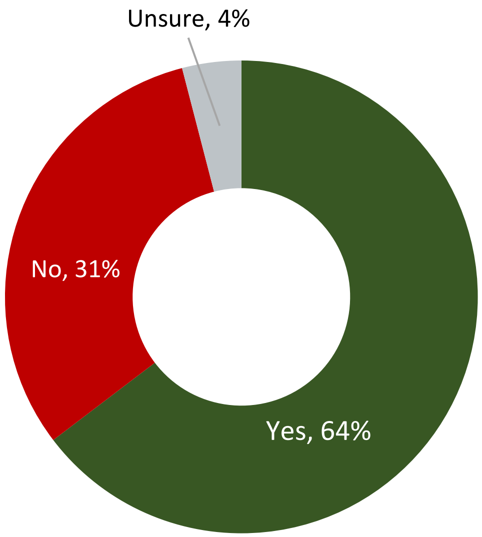
Please can you tell me how dissatisfied or satisfied you were with the following aspects of your switch to another supplier?

Base: Those who switched their energy supplier (1,366), Did not use a PCW (425), Used a PCW to complete switch (879)

N.B. Neutral and 'Don't know' responses are not shown

Use of price comparison websites (PCWs)

In line with previous quarters, around two thirds (64%) of consumers used a PCW to help switch supplier.



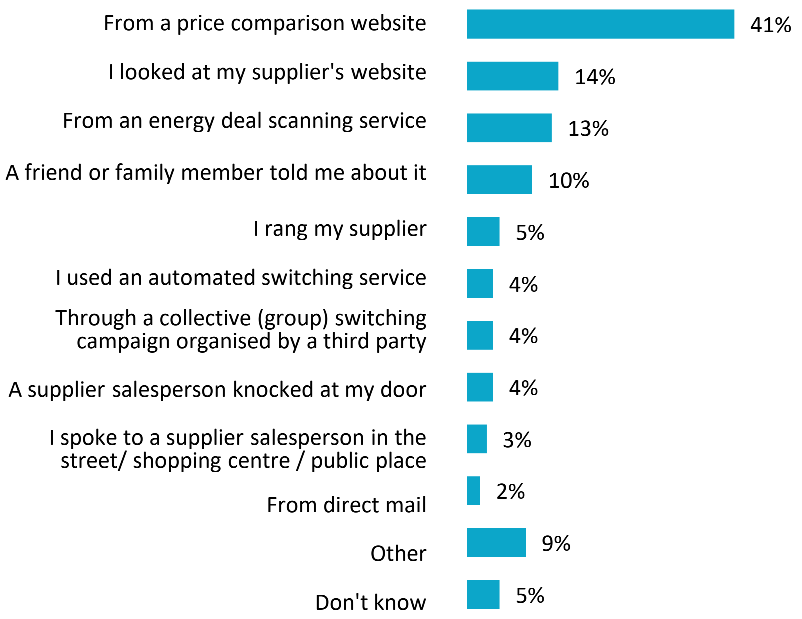
As with previous quarters, the proportion using PCWs is lowest among:

- Those paying by PPM (39%)
- Those aged 65+ (57%)
- From C2DE social grades (59%)
- Those who have a long-term illness, physical or mental health problem or a disability (58%).

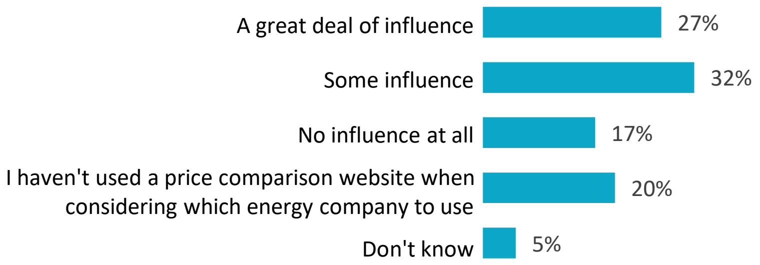
Did you use a price comparison website to help you switch energy supplier?
Base: Those who have ever switched supplier (1,366)

Source of energy deal information

PCWs remain the most commonly used source of information about energy deals.



- 15% had heard of the Ofgem accreditation for price comparison websites, and 13% had heard of the Ofgem Confidence Code.
- Over half of those aware of the Ofgem PCW accreditation said this had at least some influence on the comparison website they would use.



How did you find out about the energy deal you switched to? Base: Those who switched their energy supplier (1,366)

To what extent does Ofgem accreditation influence which price comparison website you would use? Base: All aware Ofgem accreditation for price comparison websites (708)

Before today, had you ever heard of the Ofgem Confidence Code or Ofgem accreditation for price comparison websites? Base: All Participants (3,203)

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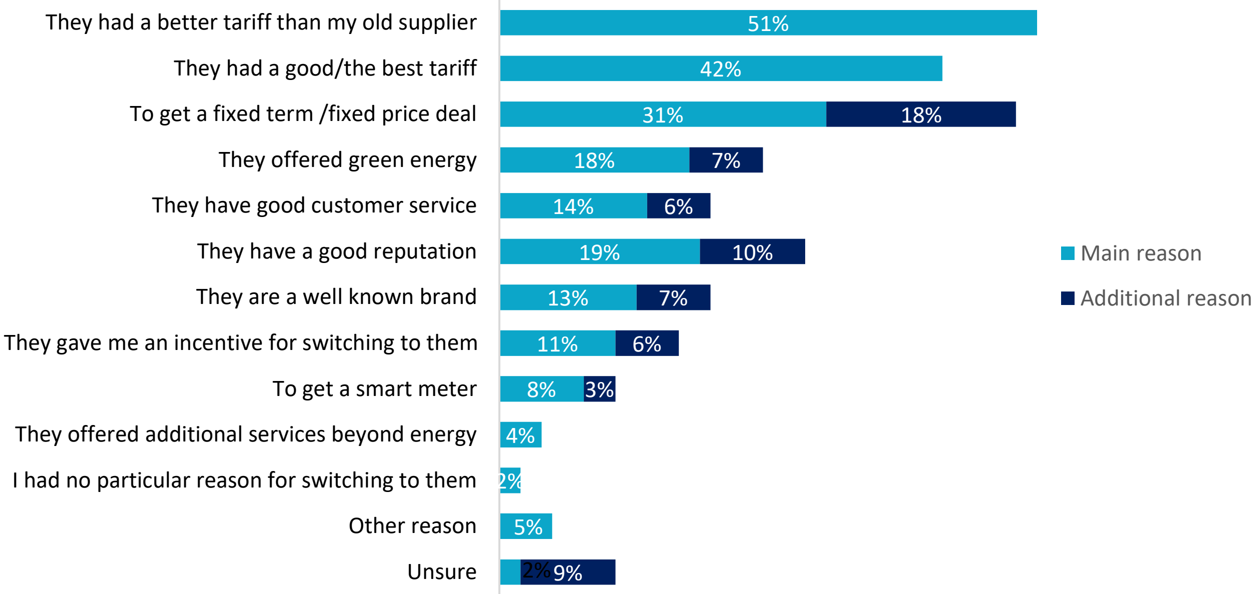
Reasons for choosing supplier

The primary reasons for selecting a supplier continue to be cost related. Even when prompting with non-cost reasons, service, reputation, incentives and green tariffs are secondary considerations (44% of those who switched their energy supplier did so exclusively due to cost/ tariff).



Once you had made the decision to switch to another energy supplier, what were the main reasons you chose the company you went with?
Base: Those who have ever switched (1,366)

Were there any other reasons for selecting them apart from the tariff?
Base: Those who have ever switched to get a better tariff (561)

Reasons for choosing supplier over time

Consistent with all previous quarters, the top reasons for choosing supplier remain having a better tariff and to get a fixed price or deal. Offering green energy and supplier reputation are still secondary reasons.

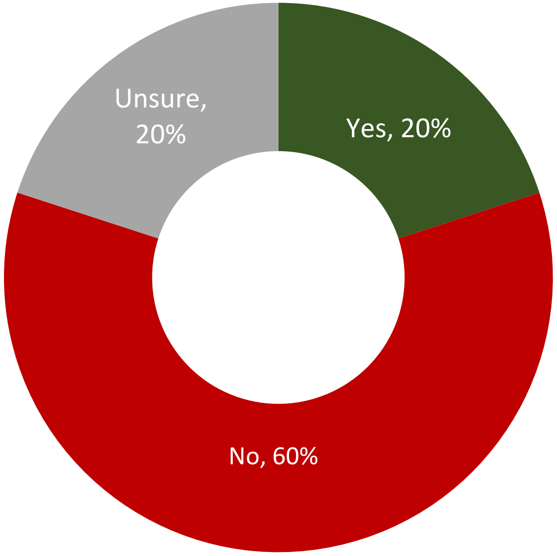
	Q1 2019	Q2 2019	Q3 2019	Q4 2019	Q1 2020	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021
They had a better tariff than my old supplier	52%	54%	57%	54%	54%	55%	55%	53%	54%	51%
They had a good/the best tariff	50%	46%	47%	49%	47%	48%	46%	44%	44%	42%
To get a fixed term /fixed price deal	33%	30%	30%	31%	31%	29%	32%	32%	40%	31%
They offered green energy	9%	13%	14%	16%	16%	19%	18%	19%	19%	18%
They have good customer service	16%	17%	14%	17%	16%	18%	14%	16%	19%	14%
They have a good reputation	16%	17%	16%	19%	17%	19%	17%	18%	17%	19%
They are a well known brand	15%	12%	14%	15%	14%	15%	13%	15%	15%	13%
They gave me an incentive for switching to them	13%	14%	14%	13%	13%	13%	10%	11%	15%	11%
To get a smart meter	7%	7%	6%	5%	8%	6%	7%	8%	12%	8%
They offered additional services beyond energy	3%	4%	4%	4%	4%	5%	4%	4%	9%	4%
I had no particular reason for switching to them	2%	2%	1%	2%	2%	2%	2%	2%	3%	2%
Base size	**1,673**	**1,708**	**1,695**	**1,847**	**1,846**	**1,646**	**1,442**	**1,485**	**1,405**	**1,366**

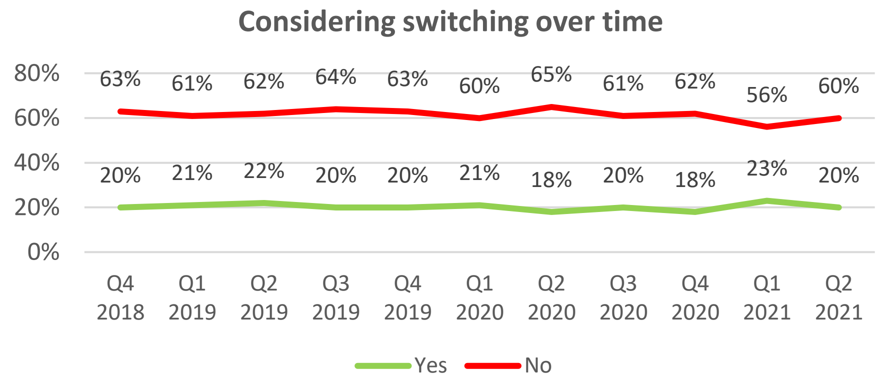
Once you had made the decision to switch to another energy supplier, what were the main reasons you chose the company you went with?

Base: Those who have ever switched

Consideration of switching

20% are thinking of switching supplier, down from a peak of 23% in Q1 2021.





- As with previous quarters, the proportion considering switching is highest among:
  - Dissatisfied customers (60%)
  - Those aged 16 to 64 (23% vs. 13% 65+)
  - Consumers from ABC1 social grades (23%).

Are you currently considering changing your energy supplier?

Base: All Participants (3,203)

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Smart meters

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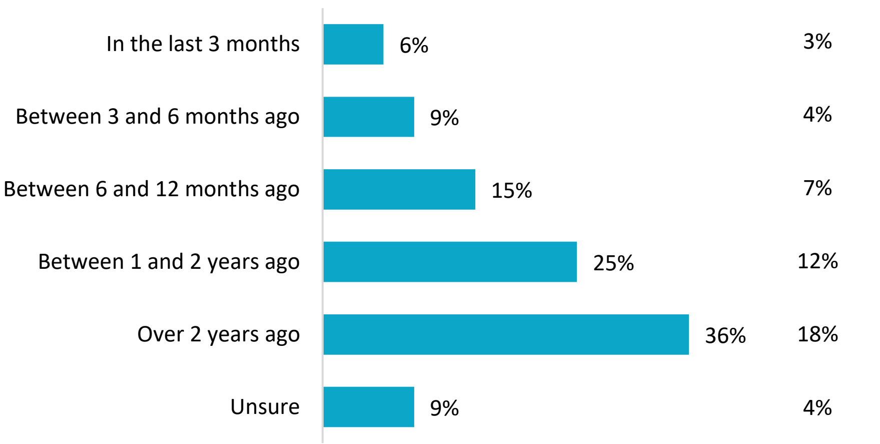
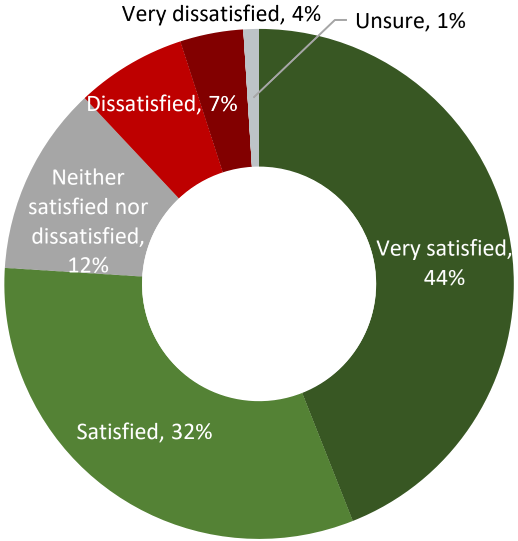
Smart meter use

52% now say they have a smart meter.

Three quarters are satisfied with the installation process.

When was your smart meter installed?





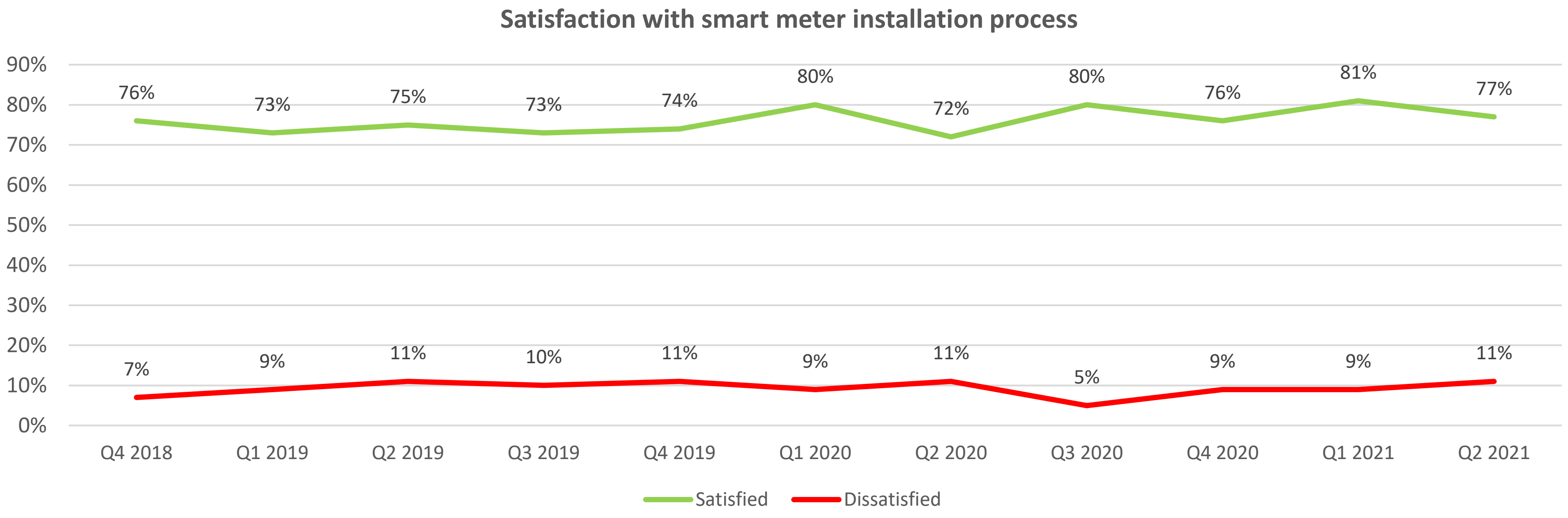
Taken together 77% are satisfied or very satisfied with the installation*

Of the two meters described below, which is the most similar to the one in your home? / When did you have your smart meter installed?
Base: All Participants (3,203) / All with smart meter (1,674)

How dissatisfied or satisfied were you with the process you went through to have a smart meter installed? Base: All with smart meter installed in last 6 months (260)
* Note rounding differences between the chart and the net satisfaction score

Satisfaction with smart meter installation over time

Satisfaction with smart meter installation is steady between Q1 2021 and Q2 2021.

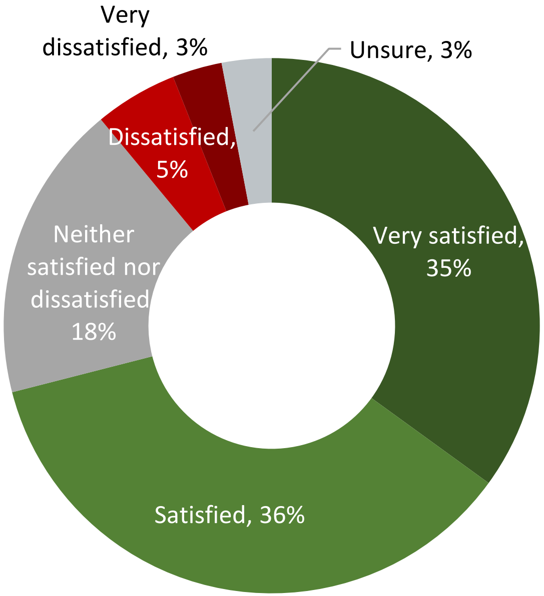


How dissatisfied or satisfied were you with the process you went through to have a smart meter installed?

Base: All with smart meter installed in last 6 months (260)

Satisfaction with smart meter overall

71% are satisfied with their smart meter.



- Satisfaction is higher among:
  - Customers who are satisfied with their supplier (81%)
  - Those aged 16-34 (78%).

Overall, how satisfied or dissatisfied are you with your smart meter?

Base: All with a smart meter (1,680)

Annex

Measuring smart meter use

- Use of smart meters is measured by asking participants to indicate which of the following best described the energy meters they have in their home.
- The question is asked separately of gas and electricity. The order of the meter descriptions was randomised across the survey sample.
- Those selecting the description for Meter A (the titles remained static) for either gas or electricity are deemed to have a smart meter.

Meter A	Meter B
Monitors energy use	Monitors energy use
Automatically sends readings of how much energy has been used in your home to your supplier	You or someone else in your household personally send readings of how much energy has been used in your home to your supplier OR someone from your supplier visits your home to take meter readings
Shows how much energy has been used in pounds and pence on a display or an app or online account	Does not show how much energy has been used in pounds and pence on a display or an app or online account
Has been installed in the last 5 years	Has been installed more than 5 years ago
SHOW IF HAVE A PRE-PAYMENT METER Allow those who pre-pay for energy to top up via their mobile or online	SHOW IF HAVE A PRE-PAYMENT METER Those who pre-pay for energy must top up at a pay point, post office or other shop


Accent