

HOUSEHOLD CONSUMER PERCEPTIONS OF THE ENERGY MARKET

Prepared by Quadrangle for Citizens Advice and Ofgem

Research conducted in Q4'22 – November and December 2022

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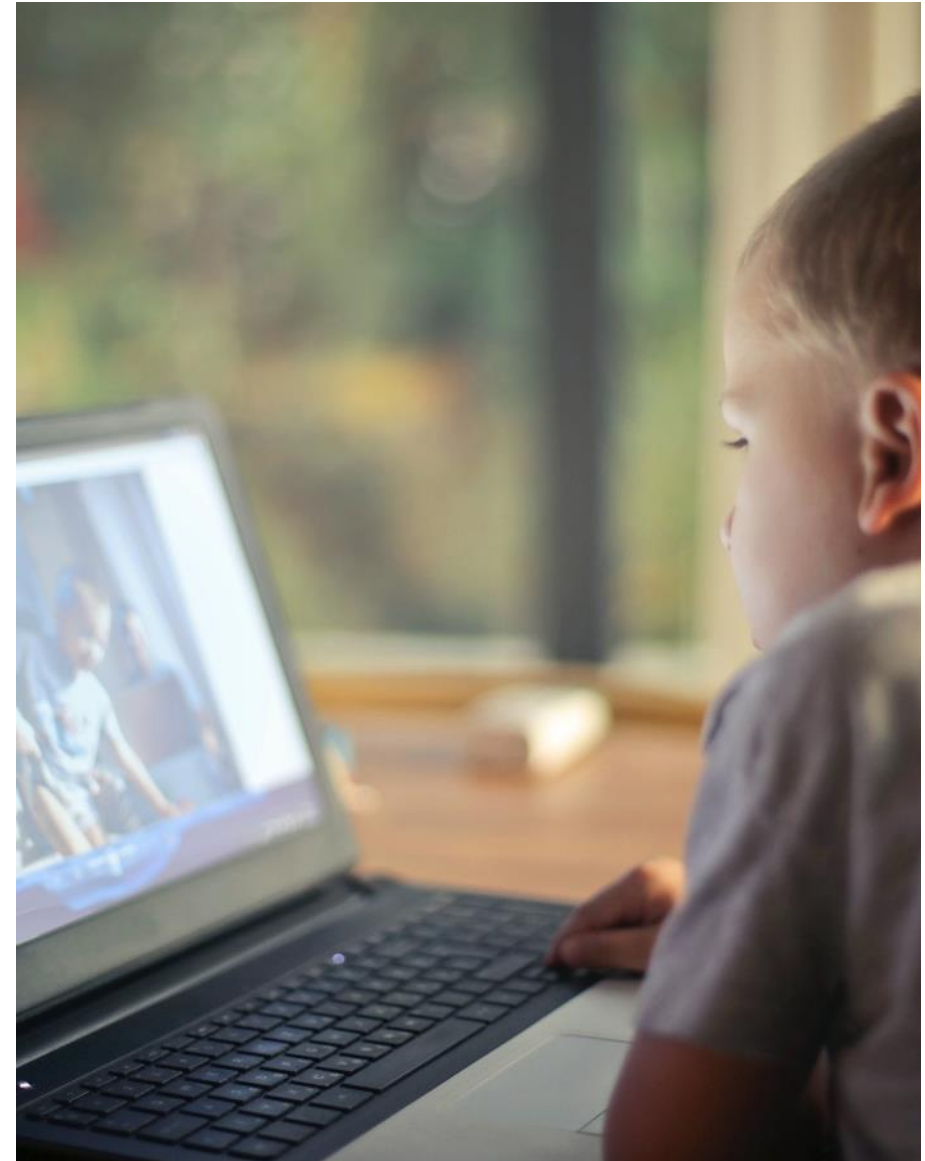
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- **Objectives** - The purpose of the research is to measure how well gas and electricity suppliers deliver to customer service principles set out by Ofgem, as well as providing measurement of topical energy issues and an understanding of consumer experiences when dealing with suppliers or energy matters. Ofgem and Citizens Advice have been jointly funding this research since 2018.
- **Methodology** – Data was collected using a mixed-method approach. The majority of the interviews were conducted using Computer-Assisted Web-Interviewing (3,023 interviews). Consumers who are digitally-excluded were interviewed using Computer-Assisted Telephone Interviewing (105 interviews).
- **Quotas and weighting** - The survey follows the same approach as previous quarters and uses quotas to achieve a sample representative of the GB bill-payer population (other than gender). Data is also weighted to the known profile of the GB population. As quota sampling was used, caution should be taken when generalising to the population level.
- **Timing** – Data for Q4'22 was collected between 8 November and 5 December 2022. This was before the very cold weather between 8 – 18 December. That cold spell is reported to have placed additional pressure on the customer service operations of suppliers.



Overall trends and movements

Two-thirds of consumers are satisfied with their energy supplier overall (67%, vs 66% in Q3'22). However, this remains near its lowest level since tracking began (prior to 2022, satisfaction typically ranged between 70-80%).

Key consumer and supplier interactions

Perceptions of the core interactions that consumers have with suppliers are also stable across 2022 but sit at lowest level since tracking began:

- **Customer service and contact ease:** Customer service satisfaction is 66% in Q4, similar to 64% in Q3'22. 58% of consumers who have contacted or attempted to contact their supplier found it easy to do so in Q4, down from 61% in Q3'22. This is at the lowest level since tracking began.
- **Complaints handling:** over half of consumers are dissatisfied with complaints handling (57%, vs 49% in Q3'22).
- **Billing:** satisfaction with ease of understanding the bill is 70%. This is stable compared to 70% in Q3'22 but at the lowest since tracking began. Consumers continue to find the numbers and terminology on their bills confusing.
- **Switching:** satisfaction with switching overall is 67%, similar to 65% in Q3'22.

Affordability concerns and debt

Throughout 2022, around **half of consumers have been concerned that they won't be able to pay their energy bills** (50% in Q4'22).

84% of all consumers report they have actively taken steps to **reduce their energy use**, and verbatim comments indicate that some consumers are also using other strategies (e.g. skipping meals) to afford their energy bills. Some consumer comments also show that they **don't believe that suppliers care** about the affordability issues they are facing, and there are some instances of consumers saying that **suppliers continue to take unnecessary payments** even when consumers are in credit.

Both credit meter and prepayment meters consumers could benefit from **more proactive support when they have run into debt** – often the consumer reaches out first (43% credit meter, 27% prepayment), and they then aren't offered support that they feel is appropriate for them (e.g. 20% of credit meter consumers felt they weren't offered appropriate support).



RESEARCH OVERVIEW

The survey focuses on measuring how well suppliers deliver to customer service principles set out by Ofgem, as well as providing measurement of topical energy issues and an understanding of consumer experiences when dealing with suppliers or energy matters.

Background to the survey



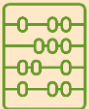


- Ofgem and Citizens Advice have been jointly funding a tracking survey of approximately 3,200 GB domestic energy consumers to measure the quality of service delivered by domestic energy suppliers since 2018.
- The survey has been running approximately once per quarter to monitor changes over time. This report focuses on the sixteenth wave of the research (Q4'22, Nov/Dec 2022).
- In mid-2021 there was a change of provider conducting the research on behalf of Ofgem and Citizens Advice (Quadrangle). There has consequently been a review of the question set in the survey – some key questions have been maintained, and these results are therefore comparable to previous waves of the survey. However, some questions have been added or amended (the results from these questions will not be comparable to previous waves of the research).

- **Research objectives**

Key research objectives are to:

- Measure satisfaction with the dimensions of customer service at GB level
- Determine which areas of customer service are stronger / weaker
- Monitor changes to the quality of service provided over time
- Understand how satisfaction and experiences of energy vary across different consumer groups (e.g. how they pay for energy and demographics)
- Measure consumer attitudes towards topical issues, such as affordability concerns.



	Main survey	Digitally excluded respondents
	Data was collected using a mixed-method approach. The majority of the interviews were conducted using Computer-Assisted Web-Interviewing (CAWI).	Consumers who are digitally-excluded were interviewed using Computer-Assisted Telephone Interviewing (CATI).
	Consistently with previous waves of the research, respondents were sourced from the Savanta online panel.	Respondents were sourced from a database of GB consumers.
	3,023 responses were collected.	105 interviews were achieved.
	14 th November 2022 – 2 nd December 2022	08 th November 2022 – 5 th December 2022
	<p>Respondents were included in the survey if they met the following criteria:</p> <ul style="list-style-type: none"> • Know the energy type they have in their home • Are responsible for their household’s energy bills or for choosing their energy supplier • Pay their energy bills directly to their supplier rather than as part of another payment (e.g. rent) • Specified their age, gender, region, and socio-economic grade (for quotas and weighting purposes) • Know who their energy supplier is 	<p>In addition to the screening criteria in the main survey, these respondents also either:</p> <ul style="list-style-type: none"> • Do not have internet access at either home, work, or another location • Are not confident using the internet • Have <i>only</i> used the internet in the past 6 months for email, general browsing, accessing news/sports websites, or accessing social media – rather than using the internet for more complex tasks such as online banking

FIELDWORK DATES

The fieldwork timings for each of the quarters of the research are shown in the table below.

	Q4'18 (W1)	Q1'19 (W2)	Q2'19 (W3)	Q3'19 (W4)	Q4'19 (W5)	Q1'20 (W6)	Q2'20 (W7)
Main survey	24 th Oct – 11 th Nov 2018	29 th Jan – 6 th Feb 2019	26 th Mar – 15 th Apr 2019	3 rd – 17 th Jul 2019	1 st – 23 rd Oct 2019	6 th – 22 nd Jan 2020	1 st – 17 th Apr 2020
Digitally excluded respondents	24 th Oct – 13 th Nov 2018	31 st Jan – 17 th Feb 2019	1 st – 16 th Apr 2019	1 st – 23 rd Jul 2019	3 rd – 17 th Oct 2019	9 th – 24 th Jan 2020	1 st – 24 th Apr 2020

	Q3'20 (W8)	Q4'20 (W9)	Q1'21 (W10)	Q2'21 (W11)	Q3'21* (W12)	Q4'21** (W13)	Q1'22 (W14)
Main survey	21 st Aug – 16 th Sep 2020	20 th Nov – 15 th Dec 2020	5 th – 20 th Feb 2021	5 th – 20 th May 2021	1 st – 18 th Oct 2021	18 th Jan – 26 th Jan 2022	10 th Mar – 20 th Mar 2022
Digitally excluded respondents	24 th Aug – 28 th Sep 2020	24 th Nov – 14 th Dec 2020	n/a	n/a	24 th Sep – 4 th Oct 2021	10 th Jan – 21 st Jan 2022	4 th Mar – 17 th Mar 2022

	Q3'22*** (W15)	Q4'22 (W16)
Main survey	25 th Jul – 5 th Aug 2022	14 th Nov – 2 nd Dec 2022
Digitally excluded respondents	12 th Jul – 5 th Aug 2022	8 th Nov – 5 th Dec 2022

*Q3'21 fieldwork was delayed in order to allow time for survey changes to better capture consumer experiences of the Supplier of Last Resort process

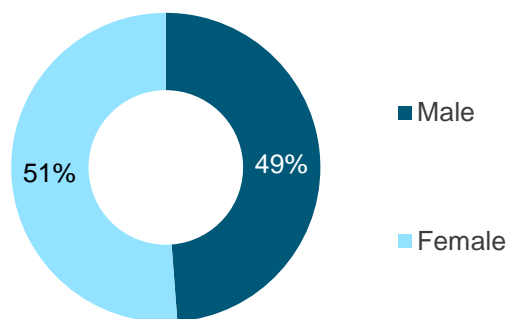
**Q4'21 fieldwork was delayed in order to avoid the Christmas period, which can sometimes create strange results (positivity bias)

*** Survey was not run in Q2'22

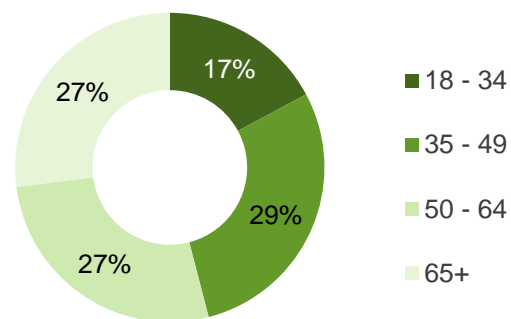
QUOTAS AND WEIGHTING

The survey follows the same approach as previous waves and uses quotas to achieve a sample representative of the GB bill-payer population (other than gender). Quotas are set on gender, age, socio-economic group (SEG) and region. Data is weighted to the known profile of the GB population. Quotas were based on census Household Reference Person (HRP) as a proxy for bill-payer.

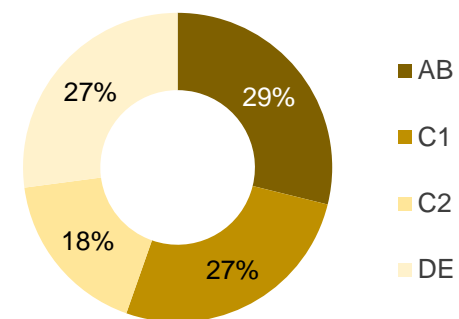
Gender



Age

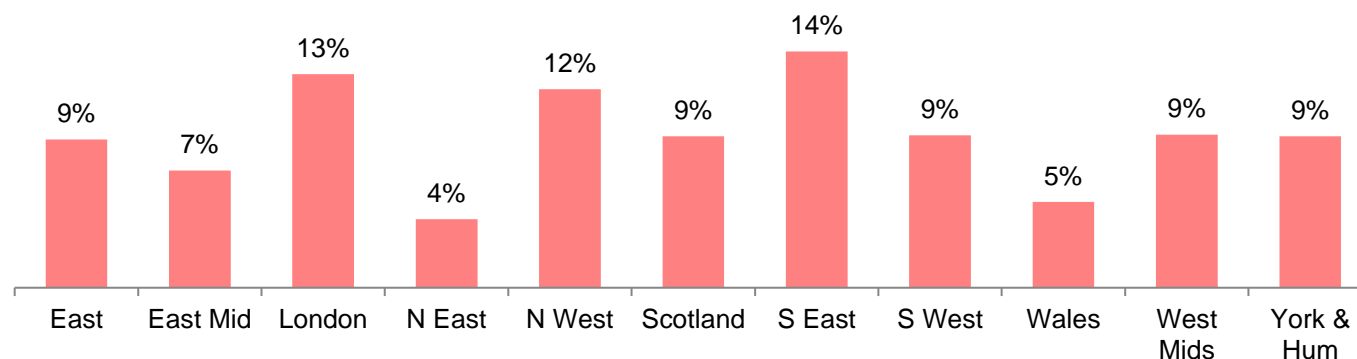


Socio-economic group (SEG)



Socioeconomic group is defined by the occupation and retirement status of the main income earner in the respondent's household. Where the respondent is retired, their previous occupation and pension type are also taken into account.

Region



Weighted data shown

Base sizes: Q4'22=3128

Q8. Please indicate your gender. Q7. Which of the following age groups are you in? Q13. Please can you tell us which region you live in? Q9. How would you describe the occupation of the main income earner in your household? Where applicable: Q10. Does the main income earner have a state pension, a private pension or both? Q11. How would you describe the main income earner's occupation before retirement?

Indicates a significant
 ↑ Increase / Decrease ↓
 At 95% confidence wave-on-wave



OVERALL SATISFACTION OVERVIEW

According to this tracker survey, satisfaction with supplier has remained stable throughout 2022, after a period of decline between Q4'20 and Q1'22. However, consumers remain the least satisfied they have ever been – those who are least satisfied tend to be those who have experienced an issue with their supplier or are consumer groups that may be more vulnerable.

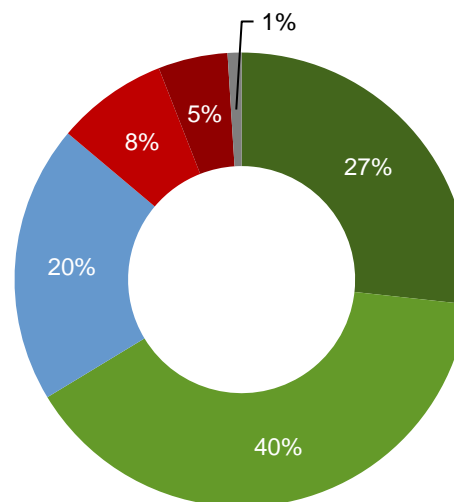
Consumers significantly more likely to be satisfied are:

- Digitally excluded consumers (76%)
- Consumers that own their home outright (73%)
- Consumers on fixed tariffs (72%)
- Older consumers (aged 65+) (71%)
- Consumers with a smart meter (68%)

Those significantly more likely to be dissatisfied are:

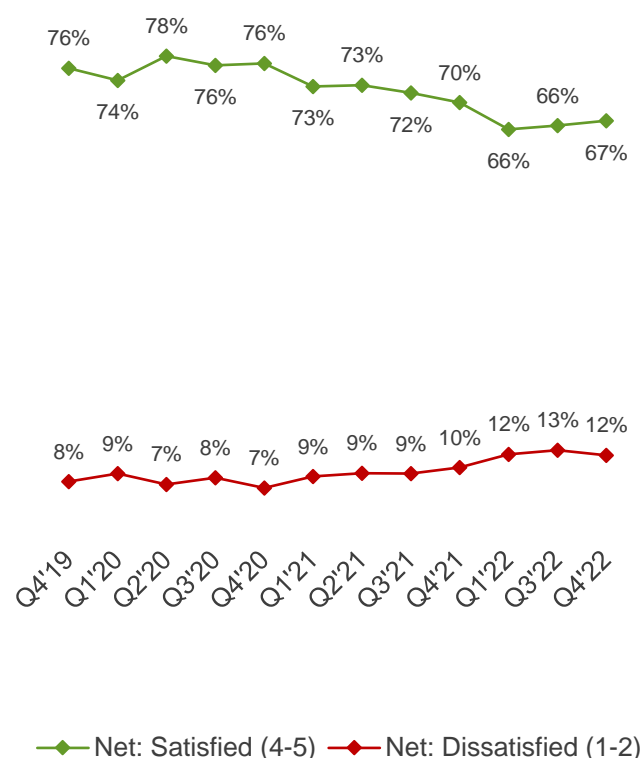
- Those that have attempted to switch supplier but have been unsuccessful (28%)
- Consumers that have been through the Supplier of Last Resort process (20%)
- Consumers receiving at least one form of state benefit (16%)
- Consumers with a long-term illness, physical or mental health problem or disability (15%)
- Consumers that own their home with a mortgage or rent (15%)

Overall satisfaction – Q4'22



- Very satisfied
- Satisfied
- Neither satisfied nor dissatisfied
- Dissatisfied
- Very dissatisfied
- Unsure

Overall satisfaction – over time



Indicates a significant
 ↑ Increase / Decrease ↓
 At 95% confidence, wave-on-wave

Base sizes: Q1'19=3175, Q2'19=3208, Q3'19=3185, Q4'19=3185, Q1'20=3202, Q2'20=3027, Q3'20=3180, Q4'20=3180, Q1'21=3165, Q2'21=3172, Q3'21=3167, Q4'21=3143, Q1'22=3,171 Q3'22=3204, Q4'22=3104
 Q21. Overall, how satisfied or dissatisfied are you with your supplier as your supplier of <FUEL TYPE>?



CUSTOMER SERVICE SATISFACTION

Customer service perceptions are steady when compared to the whole of 2022, but low. When consumers are dissatisfied, this is most commonly because they struggle to establish contact with their suppliers, or because queries aren't resolved in a timely way or at all.

When consumers are **dissatisfied with customer service**:

- In Q4'22 this is most likely to be due to difficulty contacting their supplier (43%).
- Other causes of dissatisfaction with customer service include: taking a long time for queries to be resolved (37%, an increase since last quarter, 28%), not being able to have their query resolved (35%), and perceptions that their supplier didn't listen (33%).

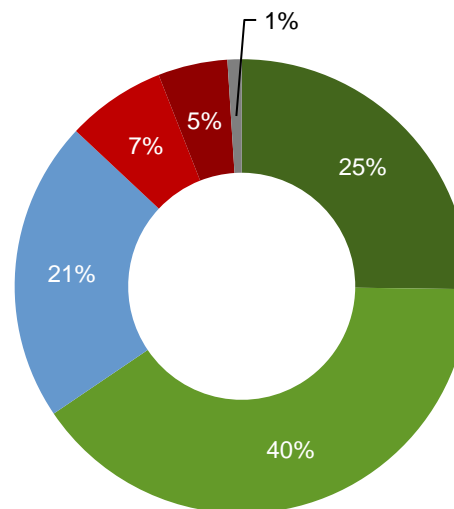
Those significantly **more likely to be satisfied** are:

- Older consumers (aged 65+) (72%)
- Those on a fixed tariff (72%)
- Consumers that own their home outright (72%)
- Consumers with a smart meter (68%)

Those significantly **more likely to be dissatisfied** are:

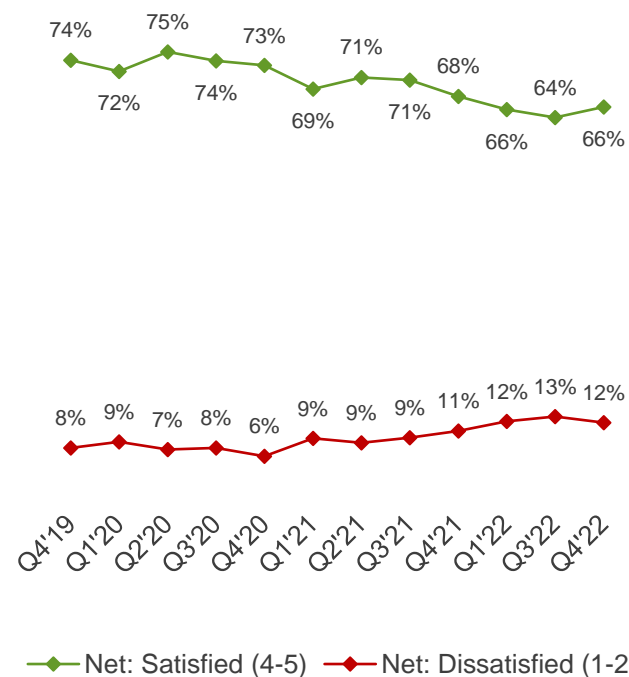
- Those that have attempted to switch supplier but have been unsuccessful (22%)
- Prepayment meter consumers (16%)
- Standard credit consumers (15%)
- Consumers with a long-term illness, physical or mental health problem, or disability (14%)

Customer service satisfaction – Q4'22



- Very satisfied
- Satisfied
- Neither satisfied nor dissatisfied
- Dissatisfied
- Very dissatisfied
- Unsure / prefer not to answer

Customer service satisfaction – over time



Indicates a significant
 ↑ Increase / Decrease ↓
 At 95% confidence wave-on-wave

Base sizes: Q1'19=3175, Q2'19=3208, Q3'19=3185, Q4'19=3185, Q1'20=3202, Q2'20=3027, Q3'20=3180, Q4'20=3180, Q1'21=3165, Q2'21=3172, Q3'21=3167, Q4'21=3143, Q1'22=3,171, Q3'22=3166, Q4'22=3088 Q23. And overall, how dissatisfied or satisfied are you with the customer service you have received from your supplier?

CONTACT VOLUMES AND REASONS FOR CONTACT

Two fifths of consumers contacted or attempted to contact their supplier in Q4'22. Consumers are most commonly getting in contact to give a meter reading, or about more complex queries such as smart meter issues or billing.

**Data for Q4'22 collected between 8 November – 5 December before the colder weather between 8 December – 18 December, results should be interpreted with this in mind.*

33% of consumers reported they had contacted their supplier in the past three months (compared to 30% in Q3'22). A further 8% tried to contact their supplier but were not able to – these consumers continue to be more likely to be dissatisfied with their suppliers (27% dissatisfied overall) compared with last wave.

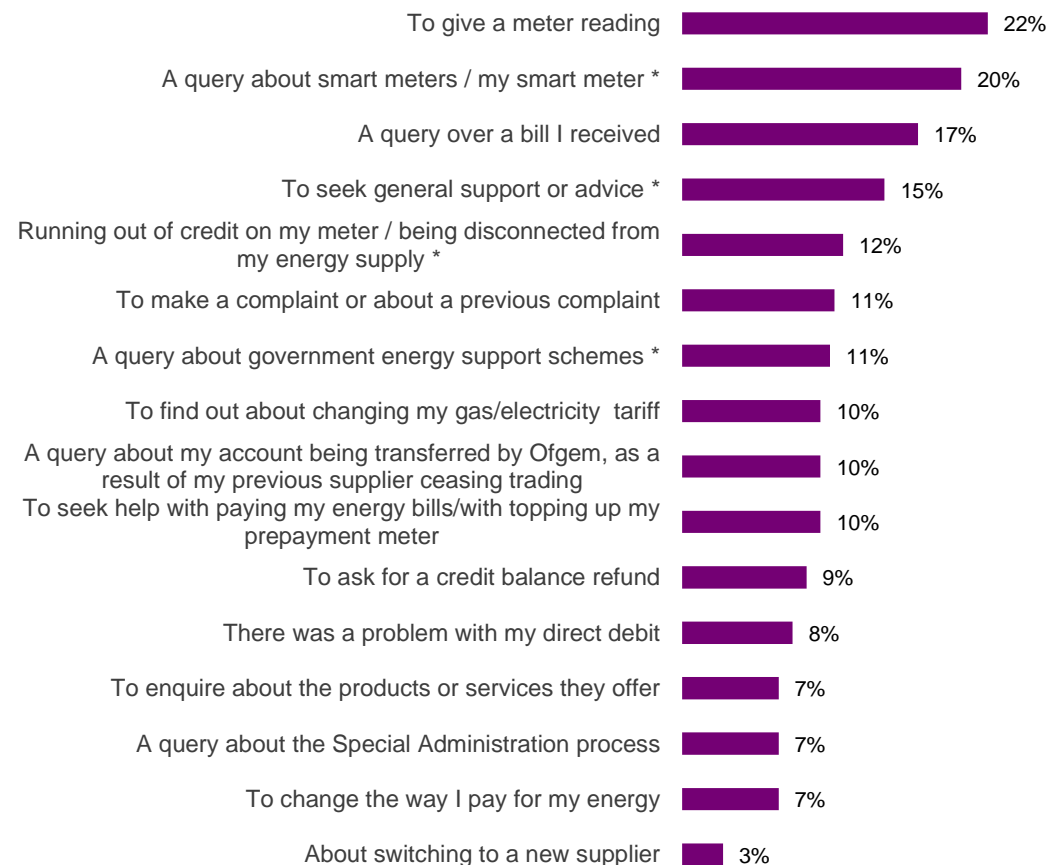
The most common ways of getting in contact are by phone (56%), by email (21%), through live chat (WhatsApp or through website) (16%), and via app (15%).

Consumers are most commonly getting in contact about:

- Giving a meter reading (22%)
- Smart meters (20%)
- Billing queries (17%)

Of those contacting about smart meters, most got in touch about an issue with their smart meter (68%), such as the in-home display not working (28%), the smart meter not sending automatic readings (20%) or a billing issue after the smart meter was installed (16%). Other consumers got in touch about getting a smart meter (47%), or finding out more information about smart meters (18%).

Top reasons for contact (Q4'22)



New response options added in Q4 2022 indicated by *

Base sizes: Q3'21=1135, Q4'21=1124, Q1'22=1187, Q3'22=1217, Q4'22=1282
 Q47. Thinking of the last time you made contact with / tried to make contact with your supplier, what was it about
 Q46. Have you contacted, or tried to contact, your supplier within the last 3 months? Q3'22=3232, Q4'22=3128

Indicates a significant
 ↑ Increase / Decrease ↓
 At 95% confidence wave-on-wave

CONTACT EASE/DIFFICULTY

Consistent with recent quarters, approximately one in four consumers who contacted or attempted to contact their supplier continued to find it difficult to contact their suppliers in Q4'22. Those finding it difficult are more likely to belong to vulnerable consumer groups or to be getting in contact about complaints, billing or smart meters.

**Data for Q4'22 collected between 8 November – 5 December before the colder weather between 8 December – 18 December, results should be interpreted with this in mind.*

Of those consumers who contacted or attempted to contact their supplier, 58% found it fairly easy or very easy to do so (down from 61% in Q3'22). By contrast, 26% found it fairly difficult or very difficult to do so (similar to Q3 '22, 24%).

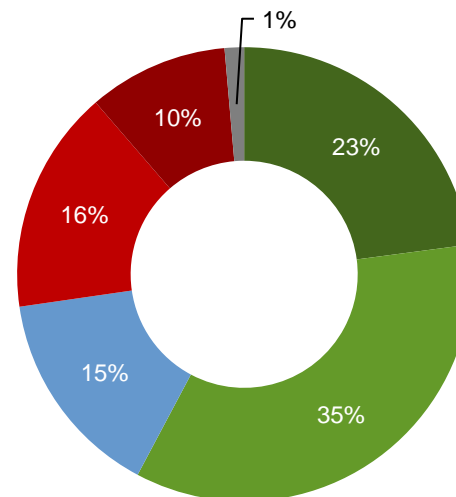
Those who were significantly more likely to find contacting their supplier **difficult**, are:

- Consumers who tried to switch but were not able to (41%)
- Prepayment meter consumers (33%)
- Digitally excluded consumers (32%)
- Consumers with a long-term illness, physical or mental health problem or disability (31%)
- Earning an income of £16,000 or less (31%)

Consumers getting in contact about these topics were more likely to report finding it difficult to contact their supplier:

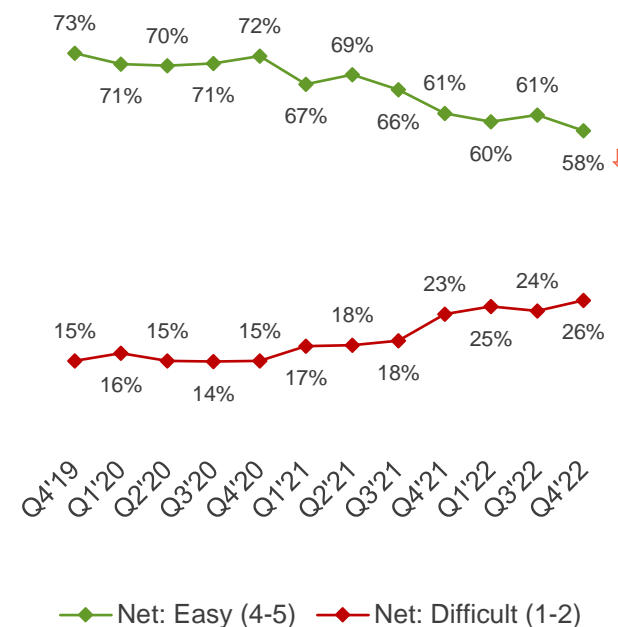
- To make a complaint (52%)
- About running out of credit on their meter (47%)
- About a problem with their direct debit (44%)
- To change the way they pay for energy (44%)
- About billing (43%)
- To make a query about smart meters (42%)

Contact ease – Q4'22



- Very easy
- Fairly easy
- Neither easy nor difficult
- Fairly difficult
- Very difficult
- Unsure + prefer not to answer

Contact ease – over time



Indicates a significant
 ↑ Increase / Decrease ↓
 At 95% confidence wave-on-wave

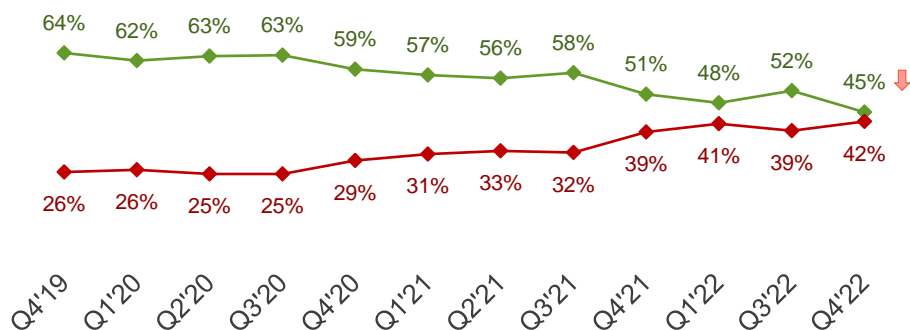
Base sizes: Q1'19=2602, Q2'19=2611, Q3'19=2578, Q4'19=2532, Q1'20=2601, Q2'20=2463, Q3'20=2499, Q4'20=2491, Q1'21=2569, Q2'21=2611, Q3'21=2431, Q4'21=2489, Q1'22=2517, Q3'22=2632, Q4'22=2592
 Q45. Thinking about the last time you tried to contact your supplier how easy or difficult did you find it to contact them?

CONTACT EASE/DIFFICULTY – BY CHANNEL

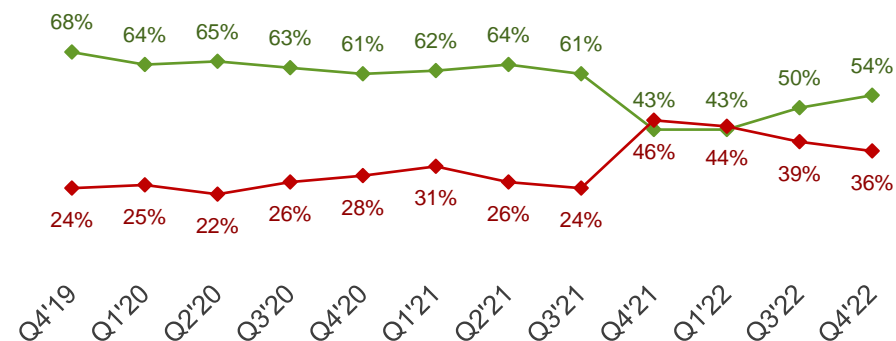
There is a decline in contact ease in Q4'22 for consumers who contacted their supplier via phone, the most popular channel. This could mean that consumers are finding it more difficult to contact their supplier by telephone.

**Data for Q4'22 collected between 8 November – 5 December before the colder weather between 8 December – 18 December, results should be interpreted with this in mind.*

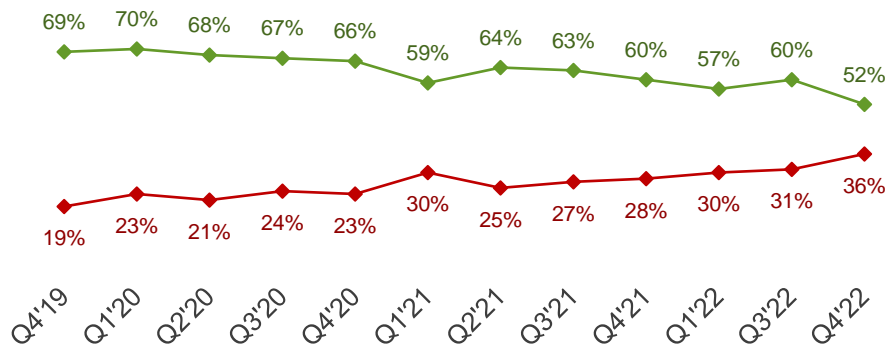
Contact ease – contacted via phone (56%)



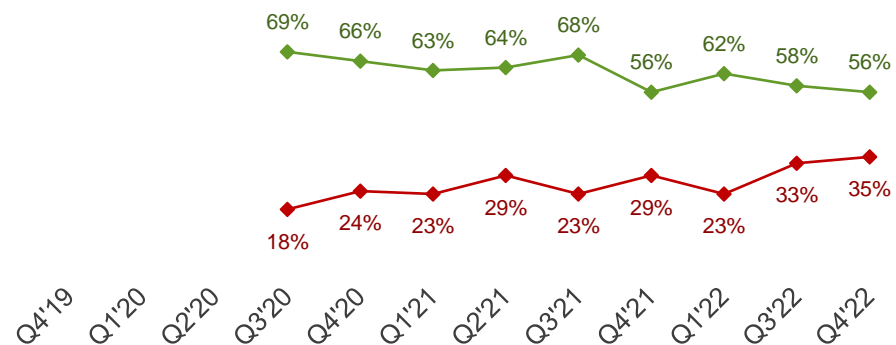
Contact ease – contacted via live chat (16%)



Contact ease – contacted via email (21%)



Contact ease – contacted via app (15%)



◆ Net: Easy (4-5) ◆ Net: Difficult (1-2)

*Neither easy nor difficult not shown. **Consumers could select multiple channels. Please note not all consumers who contacted their supplier recently were asked about the channel used.

Base sizes: Q4'22, contacted by phone (719), contacted by email (268), contacted by live chat (210), contacted by app (195) Q45. Thinking about the last time you tried to contact your supplier how easy or difficult did you find it to contact them? Q48. How did you make contact with / try to make contact with your supplier on that last occasion?

Indicates a significant
 ↑ Increase / Decrease ↓
 At 95% confidence wave-on-wave

COMPLAINTS SATISFACTION

Suppliers continue to perform poorly when it comes to complaints handling, with only a minority of consumers satisfied with the overall handling of their complaint. Consumers also tend to complain about complex and potentially sensitive issues – when this is the case, they are more likely to be dissatisfied with the complaints process.

In Q4'22, 11% of consumers who contacted their supplier in the past three months made a complaint (same as Q3'22 – 11%). Over half of consumers who made a complaint (57%) are dissatisfied with the way their complaint was handled overall – this has remained broadly consistent for the past year.

Only around a fifth of consumers who made a complaint say they have had their complaint resolved at the time of the survey (22%). This is similar to Q3'22 (16%). A sixth of consumers had given up on their complaint (14%), down from 25% in Q3'22.

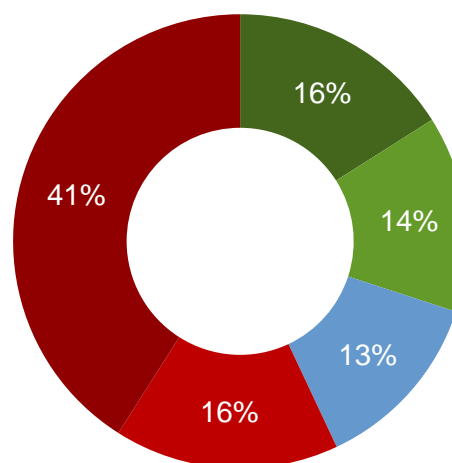
The **top 5 complaint reasons** were:

1. A problem with a standard meter (33%)
2. A problem with billing (28%)*
3. Not getting a discount they were expecting or the financial support that they needed (26%)*
4. A problem with a smart meter (25%)
5. Pricing or cost of energy (23%)*

*Three of the top 5 complaint issues relate to **money**. Consumers who complained about money issues are more likely to be very dissatisfied with the complaints process (39%) than those who complained about receiving unwanted marketing or switching (12%).

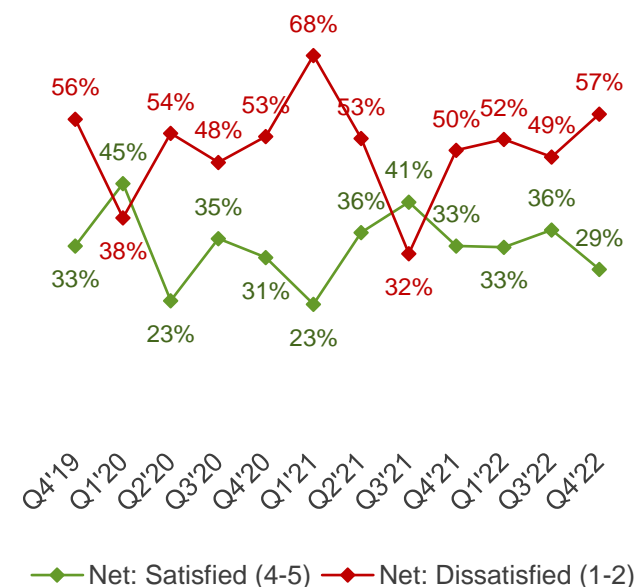
They increase the direct debit constantly without adequate reason, and you have to constantly email, call, post on Facebook, tweet before they pay attention and revert it back
Female consumer aged between 50 and 64

Overall complaint handling satisfaction – Q4'22



- Very satisfied
- Satisfied
- Neither satisfied nor dissatisfied
- Dissatisfied
- Very dissatisfied

Overall complaint handling satisfaction – over time



I have had so much trouble trying to get the first government payment to help with the energy prices, I've tried to log a complaint to be told they can't do that
A consumer with a long-term illness, physical or mental health problem or disability

N.B. base sizes are too low to reliably investigate consumer subgroup differences, including suppliers.

Base sizes: Q4'22=138 (other base sizes in speaker notes). Q52_3. Please can you tell me how satisfied or dissatisfied you are with the following aspects of your complaint: The overall handling of the complaint

Indicates a significant
↑ Increase / ↓ Decrease
 At 95% confidence wave-on-wave

BILLING SATISFACTION

Satisfaction with billing is stable across 2022, but low. The numbers shown on the bill and terminology used are continuing to cause confusion for consumers, particularly vulnerable groups.

70% of credit meter consumers are **satisfied** with the ease of understanding the bill (similar to Q3 2022, 70%), and 69% are satisfied with the accuracy of the bill (68% in Q3).

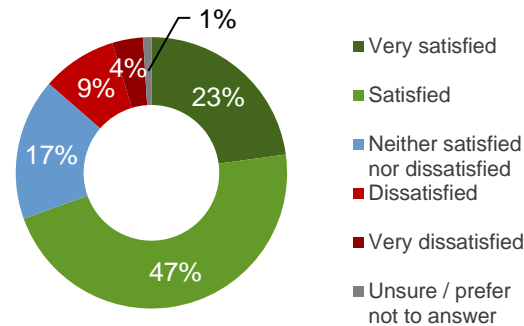
Dissatisfaction with billing is most commonly due to :

- Difficulty understanding how the total cost is calculated (37%)
- Difficulty understanding how the numbers on the bill relate to energy usage (33%)
- Difficulty understanding how much energy has been used (26%)
- Difficulty understanding the wording / terminology used (25%)
- A belief the estimates are wrong or too far off (23%)

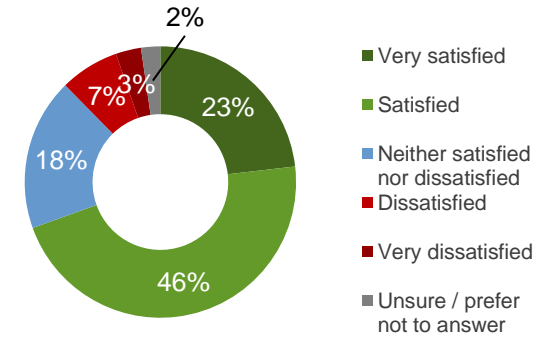
Those more likely to be **dissatisfied** with the **ease of understanding their bill** include:

- Those that have attempted to switch supplier but have been unsuccessful (22%)
- Digitally excluded consumers (18%)
- Consumers that have been through the Supplier of Last Resort process (17%)
- Consumers receiving at least one form of state benefit (16%)
- Consumers with a long-term illness, physical or mental health problem or disability (15%)
- Consumers that are carers (15%)
- Earning an income of £16,000 or less (15%)

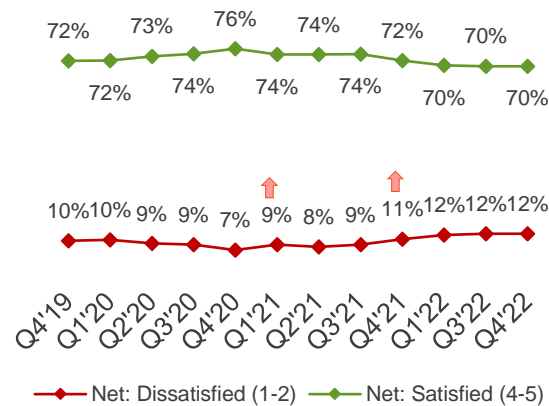
Ease of understanding the bill Q4'22



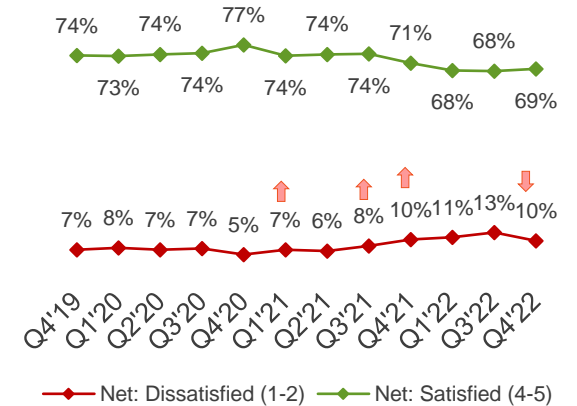
The accuracy of the bill Q4'22



Over time



Over time



Base sizes: Q4'19=2649, Q1'20=645, Q2'20=513, Q3'20=2622, Q4'20=2648, Q1'21=2689, Q2'21=2592, Q3'21=2635, Q4'21=2652, Q1'22=2769, Q3'22=2671, Q4'22=2621, Q3'22=2671, Q4'22=2621
 Q37. Please can you tell me how dissatisfied or satisfied you are with the following aspects of your supplier's bills? Q37_1. Ease of understanding the bill, Q37_2. The accuracy of your bill.

Indicates a significant
 ↑ Increase / Decrease ↓
 At 95% confidence wave-on-wave

INFORMATION PROVIDED BY SUPPLIER

More consumers reported receiving support information in Q4'22: bills assistance, how to make a complaint, and how to access independent advice. Consumers are also more satisfied with the information they have received overall.

66% are **satisfied** with the information they have received **overall** from their supplier in the past 6 months (up from 61% in Q3 '22). 11% were **dissatisfied** (down from 14% in Q3 '22).

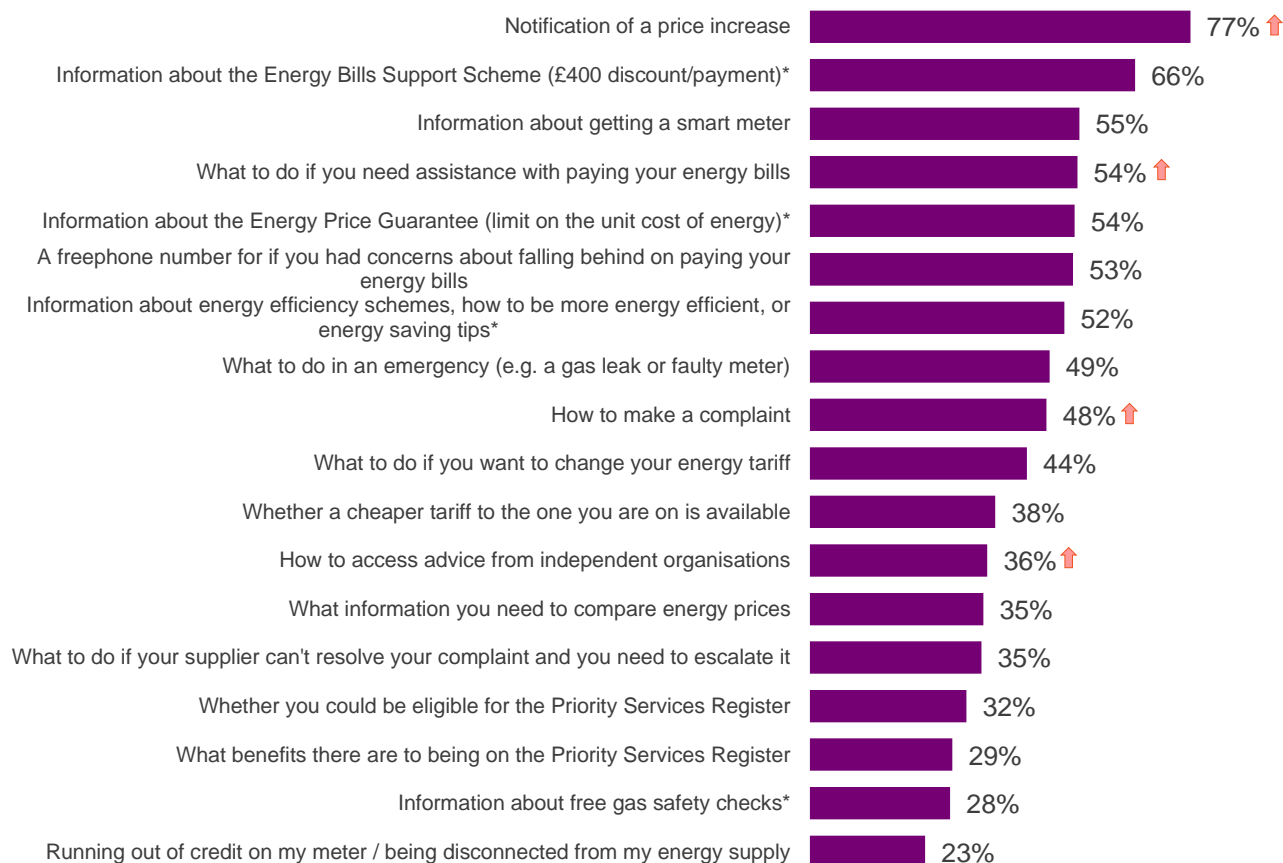
The consumers most **dissatisfied** with information provided from suppliers overall include:

- Those that have attempted to switch supplier but have been unsuccessful (24%)
- Consumers that have been through the Supplier of Last Resort process (17%)
- Digitally excluded consumers (16%)
- Consumers receiving at least one form of state benefit (16%)
- Consumers that are carers (16%)
- Household income below £16,000 (14%)
- Consumers with a long-term illness, physical or mental health problem or disability (14%)

Consumer groups that may be more vulnerable tend to be more dissatisfied with the information they have received overall. It is important that information materials are suitable for the needs of these groups.

% that recalled receiving sources of information from supplier in past six months (Q4'22)

NB. New statements were added to this question for Q4'22, as indicated by an asterisk * next to these statements. These statements have therefore not been included in wave-on-wave analysis.



SWITCHING SATISFACTION

Satisfaction with switching is largely stable across 2022, after significant falls in 2021. When consumers are dissatisfied with switching this is due to reasons relating to both the previous and new suppliers (i.e. at both the off- and on-boarding stages).

About a tenth (11%) of consumers say they have switched their supplier in the past 12 months (12% in Q3'22).

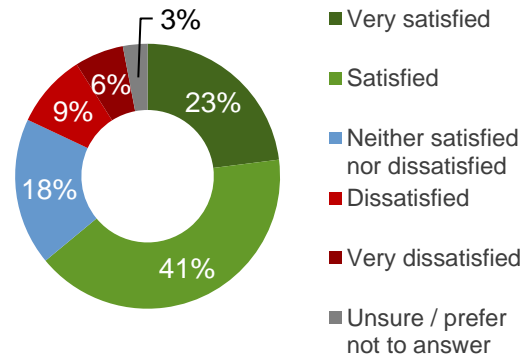
The top 5 reasons for switching in Q4'22 were:

1. To get a better tariff (40%)
2. To get better customer service (21%)
3. Moving to a well-known brand (19%)
4. Moving to a supplier with a better reputation (18%)
5. To get a fixed term deal (15%, this has declined since Q3'22 when it was 24%)

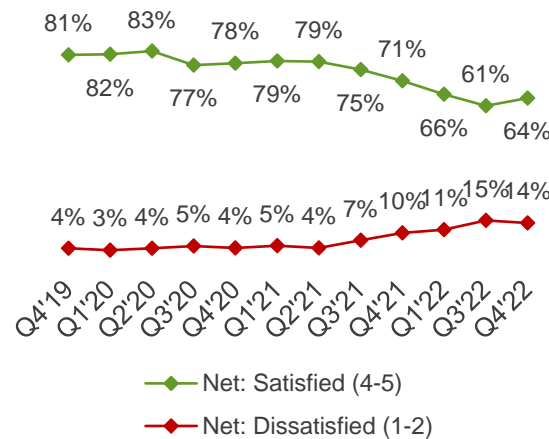
When consumers are **dissatisfied with the switching process** overall, this is most commonly because:

- They were charged twice (20%)
- It took too long to receive the credit balance (19%)
- They were put on the wrong tariff (17%)
- Both suppliers are providing inconsistent info (17%)

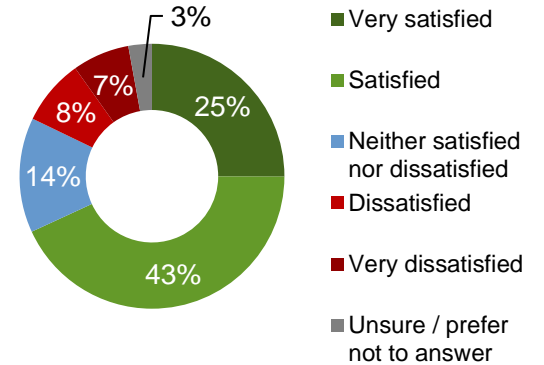
Ease of comparing suppliers + prices – Q4'22



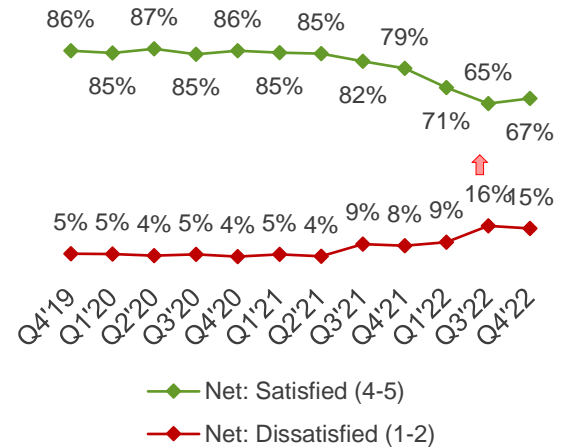
Over time



The switching process overall – Q4'22



Over time



Indicates a significant
 ↑ Increase / Decrease ↓
 At 95% confidence wave-on-wave

Base sizes: Q4'22=351 (other base sizes in speaker notes). Q60_SUM. Using a scale of 1 to 5 please can you tell me how dissatisfied or satisfied you were with the following aspects of your switch to another supplier? Q5563. In the past 12 months, have you either switched your energy supplier, or switched your energy tariff but stayed with the same supplier?



AFFORDABILITY CONCERNS

Half of consumers continue to be concerned about energy affordability, despite the vast majority taking steps to reduce their energy use. This remains very high, particularly among vulnerable consumer groups.

84% of consumers are actively trying to use less energy than they would usually, with 50% concerned they will struggle to pay their energy bills (41% in Q4'21), and 37% concerned they might not be able to contact their energy supplier if needed (29% in Q4'21).

Consumers most concerned about struggling to pay their energy bills are:

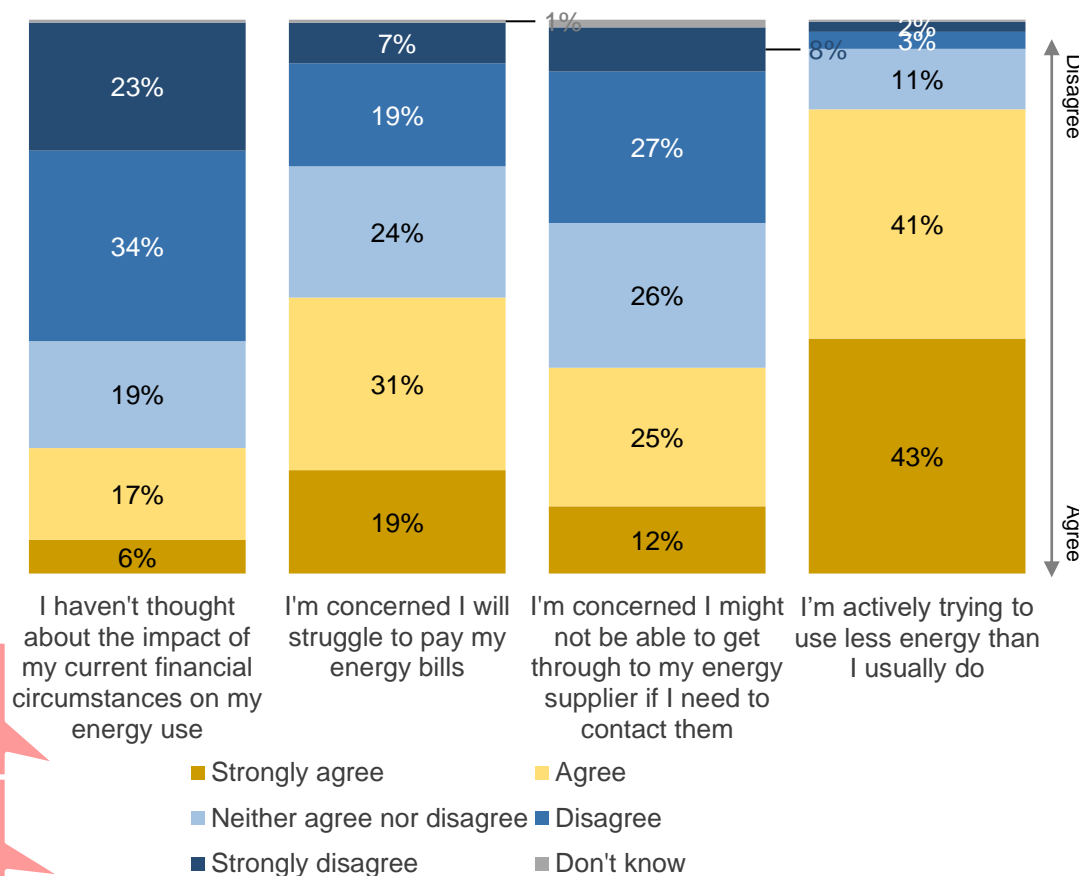
- Black consumers (66%) or Asian consumers (61%)
- Consumers with a prepayment meter (64%)
- Consumers receiving at least one form of state benefit (64%)
- Those that have attempted to switch supplier but have been unsuccessful (60%)
- Consumers that are carers (60%)
- Consumers who own their home with a mortgage or rent (60%, vs 30% who own their homes outright)
- Consumers with a long-term illness, physical or mental health problem or disability (59%)
- Earning an income of £16,000 or less (58%)

Every day I am in the library to use others' energy. We can't afford heat this winter. We can't afford Christmas or the standard of food we are used to.
Consumer with a long-term illness, physical or mental health problem or disability

No one can afford the prices that they are getting right now, it is just horrible, ridiculous, and very very wrong
Female consumer aged between 35 and 49

I doubled what I was paying which is the maximum I can afford. I had to miss meals and not spend days in my own home to afford that.
A consumer who is a full-time carer

Consumers' perceptions of the impact of their current situation on energy use – Q4'22



Indicates a significant
 ↑ Increase / Decrease ↓
 At 95% confidence wave-on-wave

FALLING INTO DEBT – CREDIT METER CONSUMERS

Similar to Q3'22, one in ten credit meter consumers have fallen behind on their energy bills. Credit meter consumers tend to fall behind on their bills due to the increased costs of living and of energy.

10% of credit meter consumers have fallen behind on an energy bill in the past three months (vs 11% in Q3'22). The main factors contributing to falling behind include increases in the cost of energy (45%) and cost of living generally (42%).

Some consumers report that their supplier has continued take payments out of their account while the consumer is in credit.

They keeping increasing my direct debit even though I am in credit for more than double my monthly bill. I did apply for a refund but only got £86 back. My bill now is only £227 and I am still in credit by £587 after that comes out.

A female retired consumer

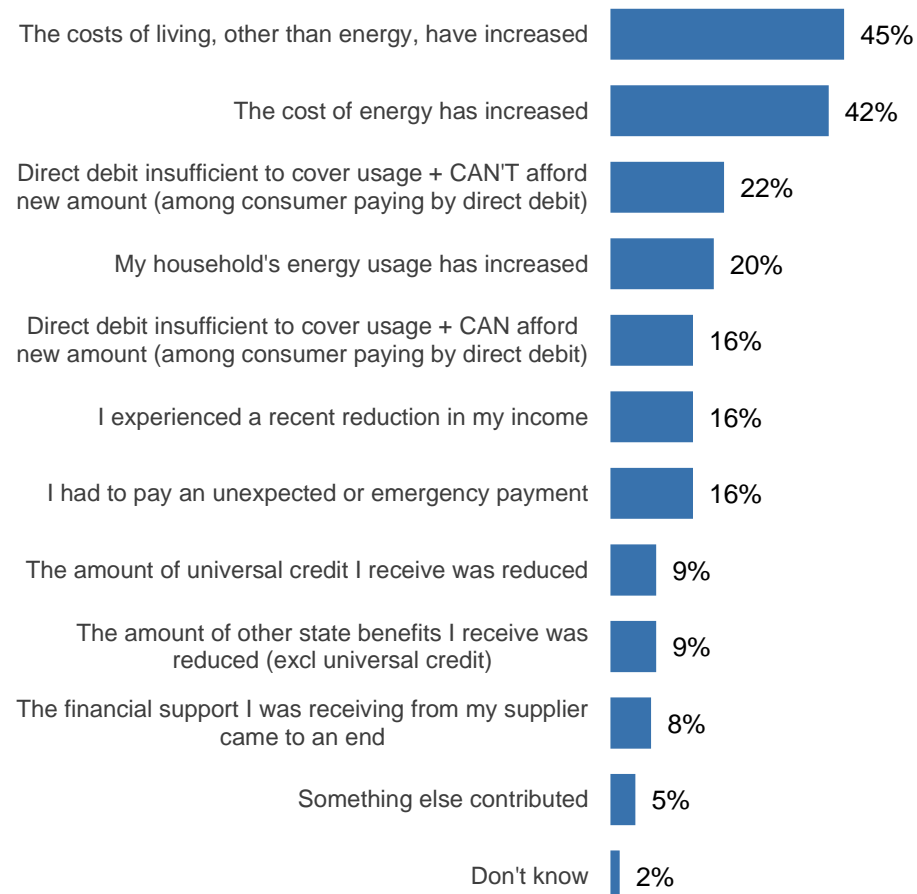
[Supplier] changed my direct debit without any advanced warning making it over twice as much. This was based on an estimate of what I might use in the winter. At the time of changing my direct debit I was 100s of pounds in credit with them and had plenty of money in my account to cover my winter fuel.

A female retired consumer

Those significantly more likely to have fallen behind on their bills are:

- Consumers that are carers (32%)
- Consumers that have switched supplier (32%)
- Black consumers (33%), consumers from mixed/ multiple ethnic groups (27%) and Asian consumers (22%)
- Consumers receiving at least one form of state benefit (21%)
- Consumers with a long-term illness, physical or mental health problem or disability (20%)
- Consumers earning an income of £16,000 or less (13%)

Contributing factors to falling behind – Q4'22



Indicates a significant
 ↑ Increase / Decrease ↓
 At 95% confidence wave-on-wave

Base sizes: Direct Debit and standard credit consumers=2520 / Direct Debit and standard credit consumers that have fallen behind =325 Q63AB. Thinking about the past 3 months, has your household fallen behind on an energy bill so that you owed money to your energy supplier? Q63A4. What factors, if any, do you think contributed to you falling behind on your energy bills?

GETTING SUPPORT – CREDIT METER CONSUMERS

Only three fifths of credit meter consumers that have fallen behind on their bills have been in contact with their supplier about support. Just over a quarter of credit meter consumers who received support weren't satisfied with it.

60% of credit meter consumers who had fallen behind on their bills got in contact with their supplier for support

While a higher proportion of consumers are reaching out first to their supplier to ask for support (43%, similar to 50% in Q3'22), more consumers report being contacted proactively from their supplier and offered support this quarter (18%, up from 11% in Q3'22).

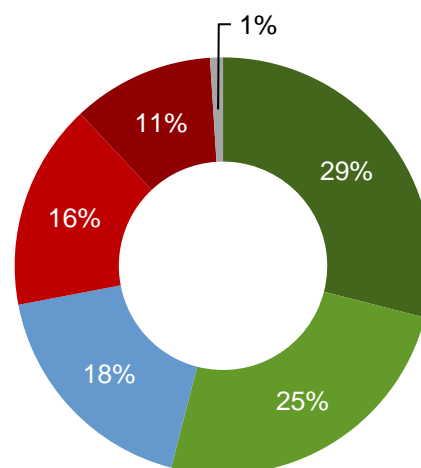
Satisfaction with support among credit meter consumers is largely stable, with only around half **satisfied** (54% in Q4'22, 49% in Q3'22), and a quarter **dissatisfied** (27% in Q4'22, 32% in Q3'22).

Suppliers could help to reduce **dissatisfaction** by:

- Offering support that is appropriate to the consumer's needs (20% disagreed their supplier did this)
- Communicating with consumers in a sensitive way (20%)
- Offering support options that are helpful (20%) – 10% weren't offered any support options

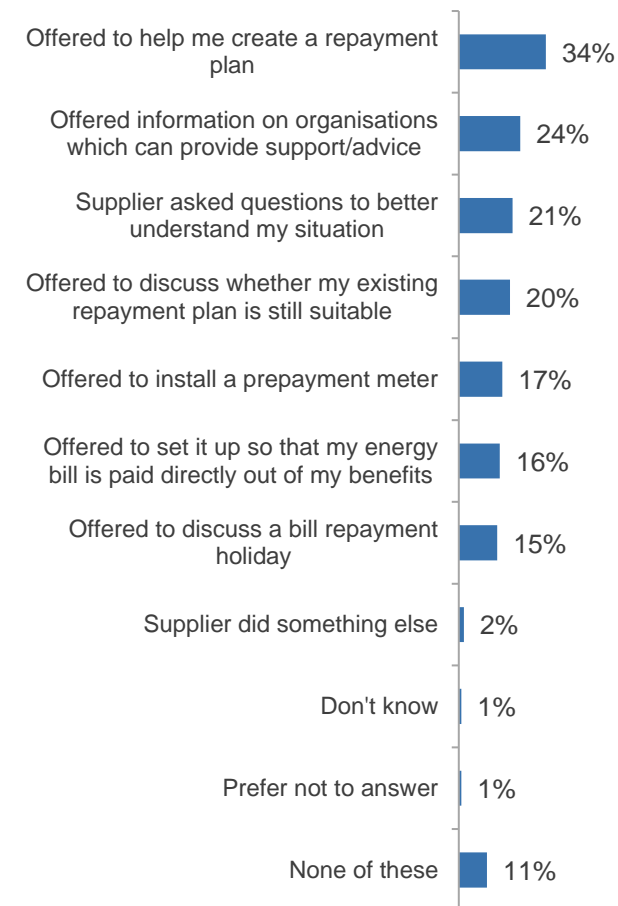
They kept asking me to pay more than I could afford, no matter what I said or tried they didn't listen
Consumer with a long-term illness, physical or mental health problem or disability

Satisfaction with debt management support – Q4'22



- Very satisfied
- Satisfied
- Neither satisfied nor dissatisfied
- Dissatisfied
- Very dissatisfied
- Unsure

Options the supplier offered to discuss – Q4'22



N.B. base sizes are too low to reliably investigate consumer subgroup differences.

Base sizes: Direct debit and pay on receipt of bill customers who have fallen behind=325 / those who have sought help=200
Q63AC1. Overall, how satisfied or dissatisfied are you with the support you have received from your supplier about paying your bills?
Q63AC3. Please could you say whether your supplier proactively offered to support you in any of the following ways?

Indicates a significant
↑ Increase / Decrease ↓
 At 95% confidence wave-on-wave

RUNNING OUT OF CREDIT – PREPAYMENT CONSUMERS

Over a third of prepayment consumers have run out of credit on their meters – this is most often due to the increased costs of energy itself and of living generally. More prepayment consumers ran out of credit this quarter due to a reduction in their universal credit, and some vulnerable consumer groups were more likely to have run out of credit.

**Data for Q4'22 collected between 8 November – 5 December before the colder weather between 8 December – 18 December, results should be interpreted with this in mind.*

37% have run out of credit on their prepayment meter in the past three months (similar to Q3'22, 31%)

Over a third of consumers who pay for their energy using a prepayment meter have run out of credit. When removing the consumers who ran out because they forgot to top up their meter (i.e. ran out due to logistic rather than affordability issues), this reduces to **29% (24% in Q3'22)**.

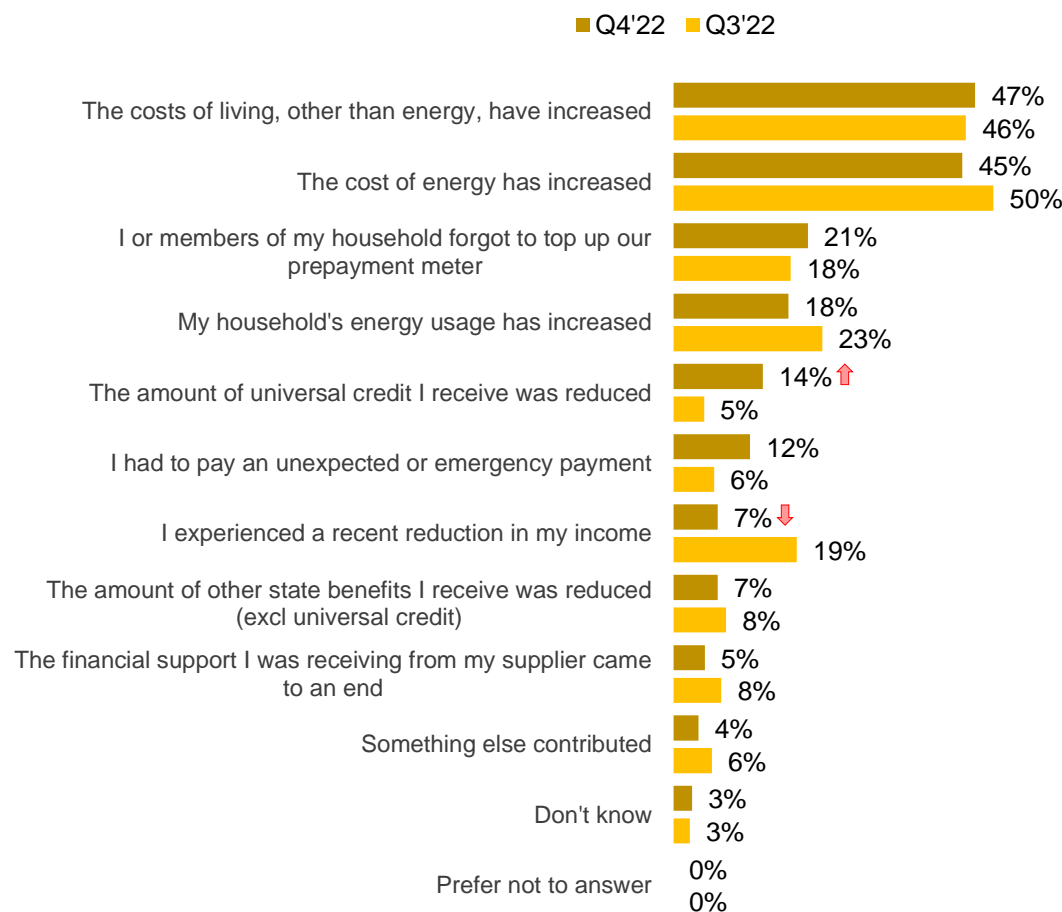
Those significantly more likely to have run out of credit are:

- Aged under 34 (53%)
- Consumers that are carers (47%)
- Consumers with a long-term illness, physical or mental health problem or disability (42%)

N.B. base sizes are too low to reliably investigate some consumer subgroup differences (e.g. ethnicity)

*They don't get in touch with us. My girlfriend is disabled and I suffer with paranoia and we struggle to get in touch. We just let it happen, we are just paying our bills, because every time we say something to [Supplier] they don't listen to us.
A prepayment consumer*

Contributing factors to running out of credit – Q4'22



Indicates a significant ↑ Increase / Decrease ↓
At 95% confidence wave-on-wave

Base sizes: Prepayment meter customers=526 / Prepayment customers that have run out of credit =123. Q63A4. What factors, if any, do you think contributed to you being disconnected from your energy supply? Q63A2. You mentioned that your household has fallen behind on an energy bill in the past 3 months. Is this the first time this has ever happened?

GETTING SUPPORT – PREPAYMENT CONSUMERS

Only two-fifths of prepayment meter consumers who ran out of credit have been in contact about support from their supplier – fewer when compared with credit meter consumers. One in five prepayment consumers were dissatisfied with the support they received from their supplier, which is linked to not receiving an appropriate support option.

**Data for Q4'22 collected between 8 November – 5 December before the colder weather between 8 December – 18 December, results should be interpreted with this in mind.*

40% of those who have run out of credit on their prepayment meter (leading to going off-supply) have been in contact with their energy supplier for help (47% in Q3'22)

Prepayment meter consumers are more likely to reach out to their supplier first (27% - not a statistically significant difference from 36% in Q3'22). As in Q3'22, fewer prepayment consumers say they were proactively contacted by their supplier to offer support (13%, vs 11% in Q3'22).

For those who have been in contact with their supplier for help – around three-fifths were **satisfied** (57%, vs 63% in Q3'22), and a fifth were **dissatisfied** (19%, vs 21% in Q3'22). A sixth of prepayment consumers (14%) weren't offered a support option at all.

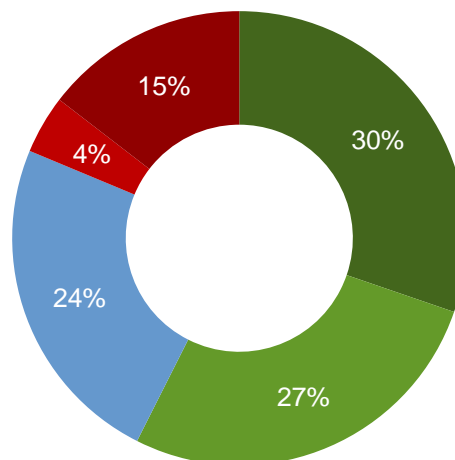
The consequences of prepayment meter consumers running out of credit and not getting support are that they go off-supply until the meter is topped up again. It is important that consumers in this situation receive the support they need to restore supply.

Emergency help is practically unavailable, and it's hard to make the customer services staff understand my issue
A prepayment meter consumer

They said any credit given would have to be charged back !!! I spent 5 hours running round trying to get credit with the codes given to me and none of them worked !!!
A prepayment meter consumer

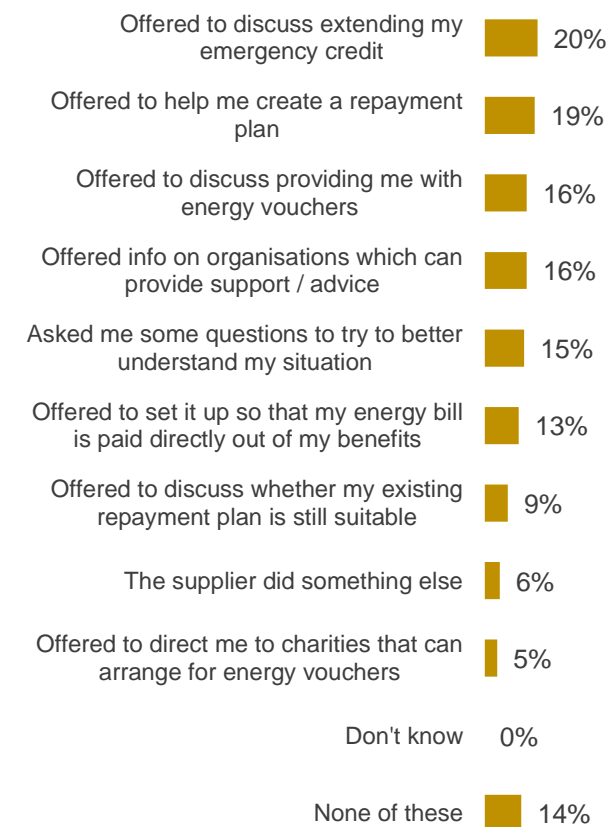
Offered me no assistance with bills i.e. reduction
A prepayment meter consumer

Satisfaction with debt management support – Q4'22*



- Very satisfied
- Satisfied
- Neither satisfied nor dissatisfied
- Dissatisfied
- Very dissatisfied

Options the supplier offered to discuss – Q4'22*



Indicates a significant
 ↑ Increase / Decrease ↓
 At 95% confidence wave-on-wave

Base sizes: Prepayment meter customers that ran out due to affordability=97, and have sought support=39*. Base sizes between 30 and 49 are flagged with an asterisk.
 Q63AC1. Overall, how satisfied or dissatisfied are you with the support you have received from your supplier about paying your bills?
 Q63AC3. Please could you say whether your supplier proactively offered to support you in any of the following ways?

PAYMENT SWITCHING – PREPAYMENT METERS

Consumer comments indicate that consumers are being switched by their supplier to a prepayment meter, sometimes without the consumer being informed of this. When this has happened, this can lead to some consumers feeling distressed and sometimes left without energy.

They made a mistake and installed a pay as you go meter for us, because there was another account linked to our flat which was in debt. We are not in debt. We have been forced to top up a pay as you go meter for months now. We have been trying to get it resolved for months but have got nowhere. It has been infuriating. There are clearly issues with their general system and complaints system. We have wasted so much time trying to get this problem fixed.

Prepayment consumer

[Supplier] installed a prepayment meter without our consent while we were out.

Prepayment consumer

They also entered my property without permission to install a meter while I was in hospital and refused to give me a copy of the supposed warrant they had. Would not recommend at all disgusting company and rubbish customer service.

Prepayment consumer with a long-term illness, physical or mental health problem or disability

Issues with meters, problems topping up. Yesterday left for an hour with no electricity, so was in the dark with 3 young children; two scared and was dark and at dinner time.

Prepayment consumer



Verbatim quotes come from an open question about overall satisfaction, and were spontaneously mentioned by consumers



- Although there have been significant declines in the proportion of consumers who report being satisfied with their supplier since 2021, the majority of consumers continue to be satisfied with their energy supplier overall. Overall satisfaction has now plateaued at the lowest level seen in this tracker survey. A similar long-term decline is observed across multiple core **customer service metrics**, including satisfaction with customer service overall, the ease of understanding bills and the accuracy of bills.
- Among those who have contacted their energy supplier recently, **ease of contact** continues to decline – with more consumers saying they found it difficult to contact their supplier than ever recorded before in this survey. This long-term trend is mirrored across all the main contact channels (telephone, email, live chat and app).
- In Q4 2022, most consumers who have recently made a complaint to their energy supplier are dissatisfied with the **handling of their complaint**.
- Consumer dissatisfaction with the **switching process** overall is similar to Q3 2022, but lower than in 2021. This likely reflects recent increases in energy as well as factors relating to the suppliers' handling of the switching process.
- Consistent with recent waves, around half of consumers are concerned that they won't be able to pay their energy bills. This is despite the vast majority of consumers reporting they are reducing their energy use. At the same time, verbatim comments show that some consumers are taking tough financial decisions to afford their energy costs.
- Around half of consumers continue to report concern about struggling to pay their energy bills. Of those who received support, nearly half of credit meter consumers and most prepayment consumers were satisfied with the support provided by their supplier.
- Verbatim comments highlight that some prepayment meter consumers have had negative experiences with forced installations. Further research will delve deeper into the experiences of prepayment meter consumers.



Contact & complaints

Contact ease continues to be an issue for many consumers. Suppliers should ensure that they are:

- Making it easy for consumers to contact them
- Answering queries in a timely way
- Ensuring staff listen and are sympathetic to consumers

Phone is the most popular, but worst performing channel and could be the priority channel for any improvements.

Suppliers should also be resolving complaints quickly and effectively for consumers.



Billing

A number of issues surrounding the complexity of bills are causing issues for consumers, particularly vulnerable consumers.

Suppliers should make sure that the information they provide to all consumers about bills and payments is timely, accurate and not misleading.



Switching

Consumers that switch suppliers continue to encounter issues at both the off- and on-boarding stages (i.e. due to both their previous and new suppliers).

Although there are aspects of the switching process that are not within suppliers' control, suppliers should ensure their switching processes are treating all consumers fairly.



Support information

Suppliers should continue to make more proactive contact with consumers who are facing energy affordability issues and offer them support.

Suppliers should make sure all consumers:

- Have access to support
- Know where and how to find support
- Have support that is suitable for their needs (i.e. doesn't assume pre-existing knowledge and using accessible language)



Debt support

Consumers are not getting adequate support from their suppliers. Suppliers can address this by:

- Offering support that is appropriate to each consumer's needs, especially for those in vulnerable circumstances
- Communicating sensitively with all consumers

Quadrangle Research Group
The Butlers Wharf Building
36 Shad Thames

London SE1 2YE
quadrangle.com
+44 (0)20 7357 9919



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