

HOUSEHOLD CONSUMER PERCEPTIONS OF THE ENERGY MARKET

Prepared by Quadrangle for Citizens Advice and Ofgem

Research conducted in Q3'22 – July and August 2022

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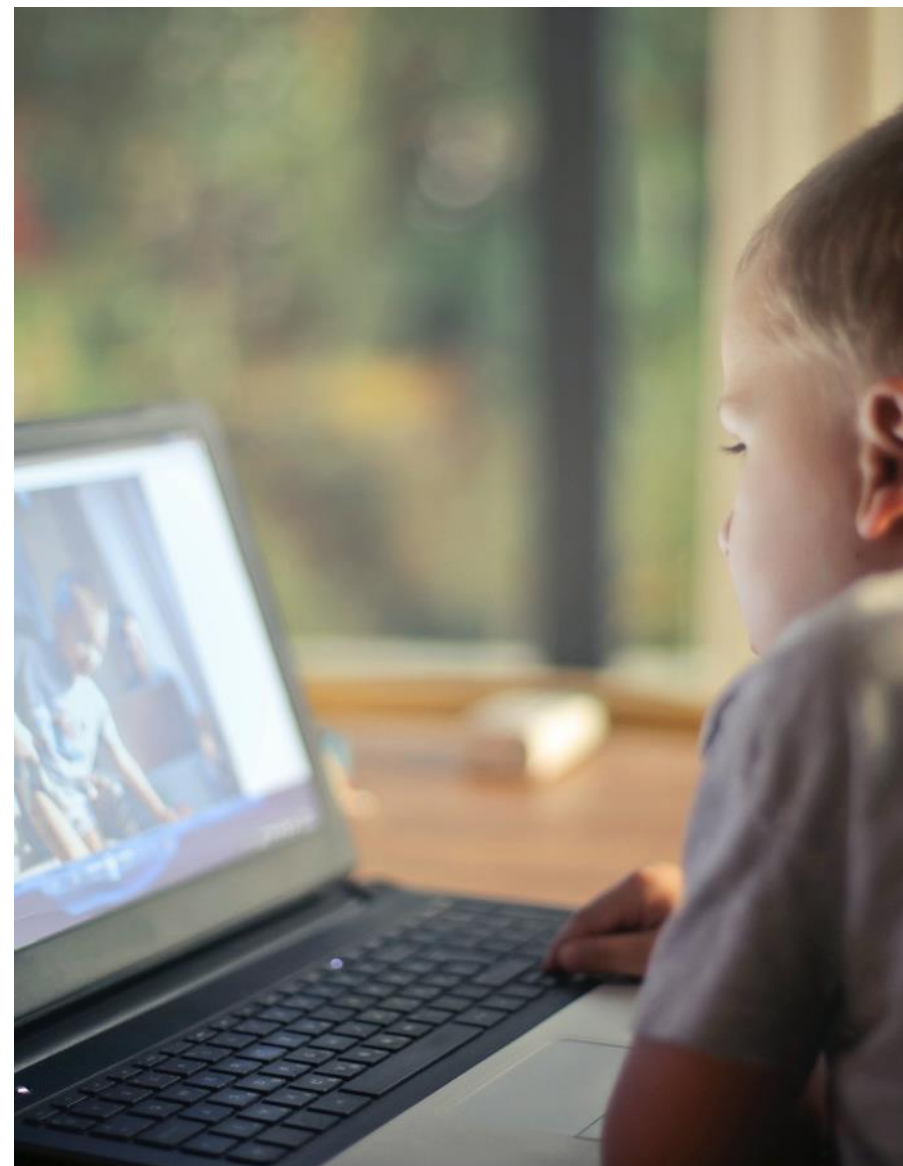
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- **Objectives** - The purpose of the research is to measure how well gas and electricity suppliers deliver to customer service principles set out by Ofgem, as well as providing measurement of topical energy issues and an understanding of consumer experiences when dealing with suppliers on energy matters. Ofgem and Citizens Advice have been jointly funding this research since 2018.
- **Methodology** – Data for Q3'22 was collected using a mixed-method approach. The majority of the interviews were conducted using Computer-Assisted Web-Interviewing (3,082 interviews). Consumers who are digitally-excluded were interviewed using Computer-Assisted Telephone Interviewing (150 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 Q3'22 was collected between 12th July and 5th August 2022. This research was conducted before price cap increase announcements in August 2022. The survey was not run in Q2'22, so throughout this report comparisons are drawn between Q3 and Q1'22.



Overall satisfaction overview

Following a significant decline in Q1'22, in Q3'22 consumers' overall **satisfaction** with their energy suppliers was stable at a historic low of 66% (vs 66% in Q1'22).

Dissatisfaction was also stable, with just under 1 in 6 consumers dissatisfied with their supplier overall (13%, vs 12% in Q1'22).

These findings should be interpreted in the context of the ongoing global gas crisis, as factors relating to the global gas crisis are likely to have contributed to the decline in overall satisfaction. This is because of the widespread impacts the global gas crisis continue to have on energy affordability, supplier failure and market engagement.

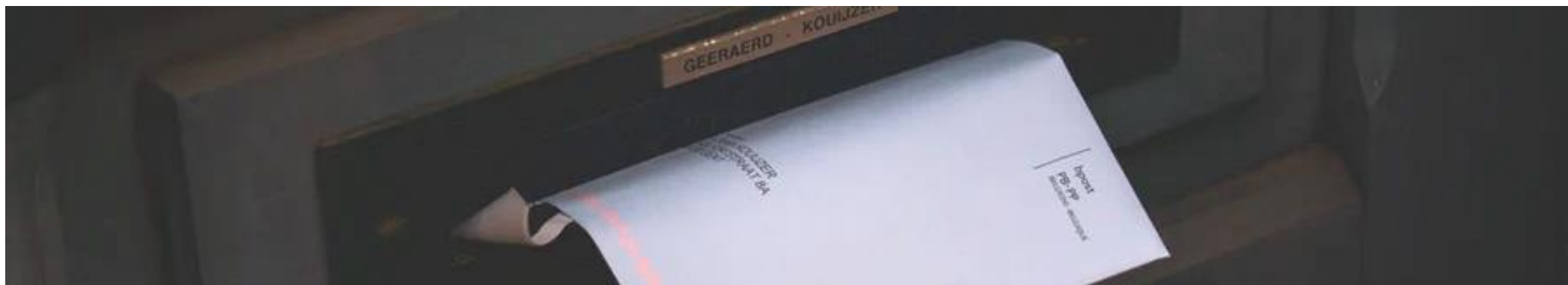
Key supplier interactions performance

Consumer perceptions across most of their interactions with suppliers were largely stable compared to Q1'22, but many sat at their lowest ever level:

- **Customer service:** around two-thirds of consumers remained satisfied with their supplier's customer service (64%), which is similar to Q1'22 (66%) but at the lowest since tracking began.
- **Contact ease:** A similar proportion of consumers got in contact with their suppliers as in Q1'22 (38%, vs 37% in Q1'22), and a quarter continued to have found this difficult (24%, vs 25% in Q1'22), suggesting suppliers are failing to address issues faced by consumers when they are getting in contact.
- **Billing:** 70% of consumers were satisfied with the ease of understanding bills (vs 70% in Q1'22), and 68% satisfied with billing accuracy (vs 68% in Q1'22). While this is consistent with the previous wave this also remained at the lowest level since tracking began. Common reasons why some consumers said they are dissatisfied are that they struggle to interpret their bills, or to understand how their bills relate to energy use.
- **Complaints handling:** 11% of consumers who contacted their supplier made a complaint (vs 8% Q1'22). A similar proportion of consumers remained dissatisfied with the way their complaint was handled (49%, vs 52% in Q1'22). Dissatisfaction was due to long processing times, and customer service experienced through email and phone channels.
- **Switching:** dissatisfaction with the switching process overall increased in Q3'22 (16%, +6% vs Q1'22). This is due to a combination of factors relating to both the previous and existing suppliers – such as delays with final bills (24%), inconsistent information (24%), incorrect tariffs (21%), poor customer service (21%), and being charged twice (21%).

Affordability and debt support

- Over half of consumers said they have affordability concerns, (53%, up from 51% in Q1'22), and more consumers were concerned they won't be able to contact their supplier if they need to.
- A similar proportion of consumers have either fallen behind on their bills (11% of credit meter consumers, vs 10% in Q1'22) or have run out of credit (31% of prepayment consumers, vs 30% in Q1'22): the rising costs of living and energy continued to be the main reasons.
- More credit meter consumers have been in contact with their supplier for support (61%, vs 43% in Q1'22), although the supplier reached out first to only 11% (vs 12% in Q1'22). Comparatively fewer prepayment consumers have been in contact with their supplier for support (47%).
- Of those who have received support, 47% of credit meter consumers and 63% of prepayment consumers were satisfied with the support provided by their supplier – prepayment consumers were more likely to say they have received a help option from their supplier (92%, vs. 73% of credit meter consumers).
- When consumers were dissatisfied with the support they received, this is due to consumers thinking that the supplier needs to provide more useful help options (46% didn't agree that options were helpful), treat them more fairly (43% didn't agree they were treated fairly), and be more sympathetic (45% didn't think the supplier was sympathetic).





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 on energy matters.

Background to the survey



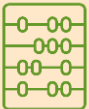


- Ofgem and Citizens Advice have been jointly funding a tracking survey of approximately 3,200 GB domestic energy consumers to measure the quality of service delivered by domestic energy suppliers since 2018.
- The survey has been running approximately once per quarter to monitor changes over time. This report focuses on the fifteenth wave of the research (Q3'22, Jul/Aug 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.
	3,082 responses were collected.	150 interviews were achieved.
	25 th July 2022 – 5 th August 2022	12 th July 2022 – 5 th August 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)						
Main survey	25 th Jul – 5 th Aug 2022						
Digitally excluded respondents	12 th Jul – 5 th Aug 2022						

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

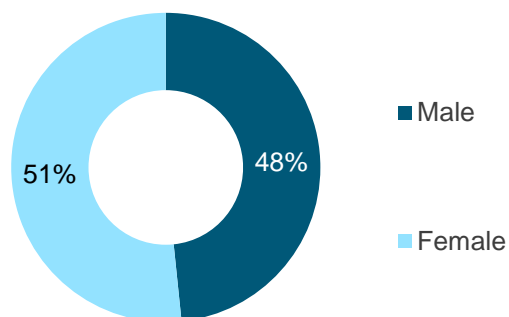
**Q4'21 fieldwork was delayed in order to avoid the Christmas period, which can sometimes create strange results (positivity bias)

*** The survey was not run in Q2'22

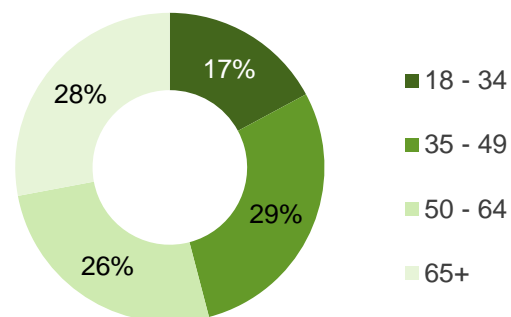
QUOTAS AND WEIGHTING

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.

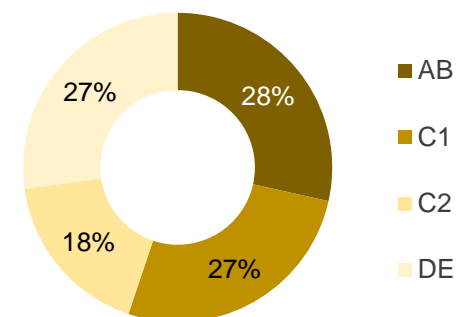
Gender



Age

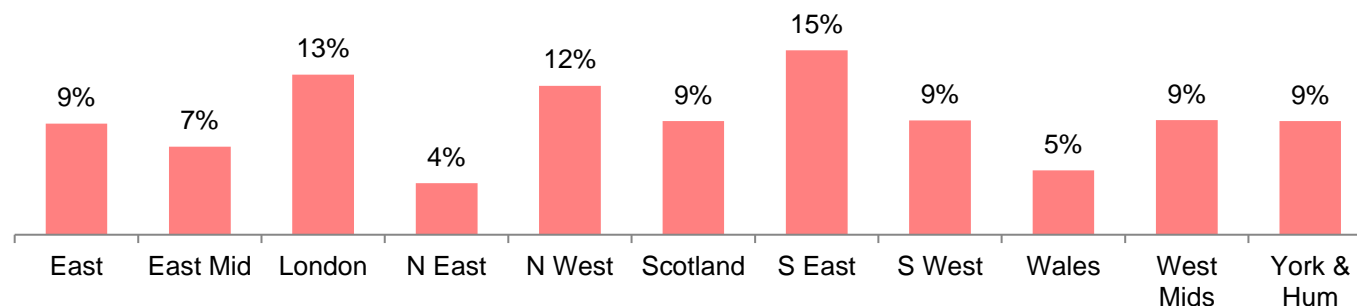


Socio-economic group (SEG)



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: Q3'22=3232

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

Consumers' overall satisfaction with their supplier remained stable in Q3'22 at the lowest level since tracking began, following decline in Q1'22.

Consumers significantly more likely to be satisfied are:

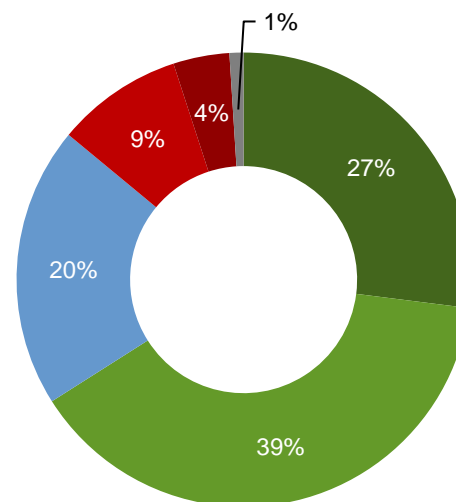
- Digitally excluded consumers (82%)
- Consumers on fixed tariffs (73%)
- Older consumers (aged 65+) (72%)
- Those with a smart meter (69%)

Those significantly more likely to be dissatisfied are:

- Those that have attempted to switch supplier but have been unsuccessful (32%)
- Consumers that have been through the SoLR process (19%)
- Consumers with a long-term illness, physical or mental health illness, physical or mental health problem or disability (16%)

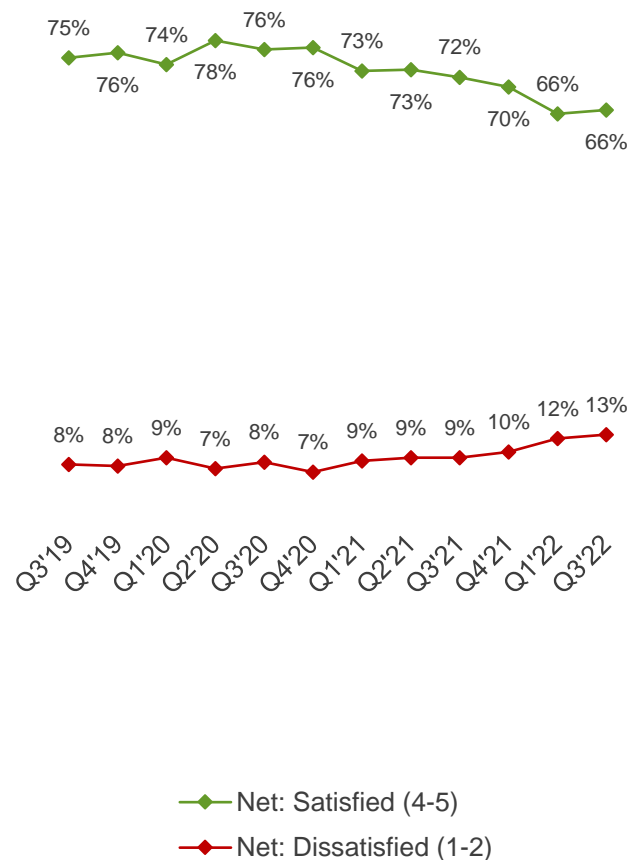
In comparison to the previous wave, the same groups were dissatisfied with their energy supplier, suggesting issues persist among these consumers groups.

Overall satisfaction – Q3'22



- 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: Q4'18=3274, 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 Q21. Overall, how satisfied or dissatisfied are you with your supplier as your supplier of <FUEL TYPE>?



CUSTOMER SERVICE SATISFACTION

Just under two-thirds (64%) of consumers were satisfied with the customer service from their energy supplier in Q3'22. This is similar to Q1'22 (64%), but lower than at the same time in the previous year (71% in Q3'21).

12% of consumers were dissatisfied with the customer service provided by their supplier in Q3'22, similar to Q1'22 (12%).

Among those who reported they were dissatisfied with customer service, 44% pointed to difficulty contacting their supplier, 37% said they felt that their supplier didn't listen, and 33% said they were not receiving consistent information from their supplier.

To combat this long-term decline in customer service satisfaction, suppliers should look to improve how easy it is for consumers to get in contact.

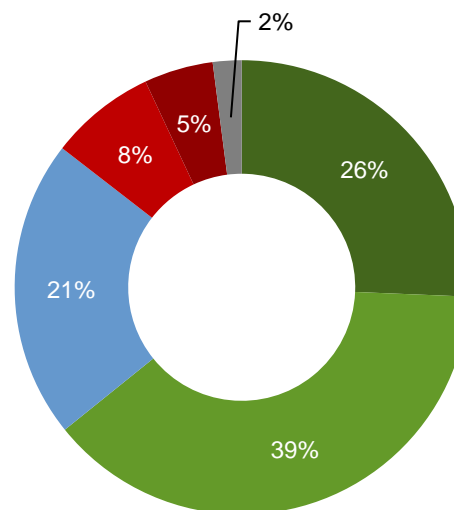
Those significantly more likely to be satisfied are:

- Aged 65+ (70%)
- Those on a fixed tariff (70%)
- Earning £45K+ (68%)
- Consumers with a smart meter (67%)

Those significantly more likely to be dissatisfied are:

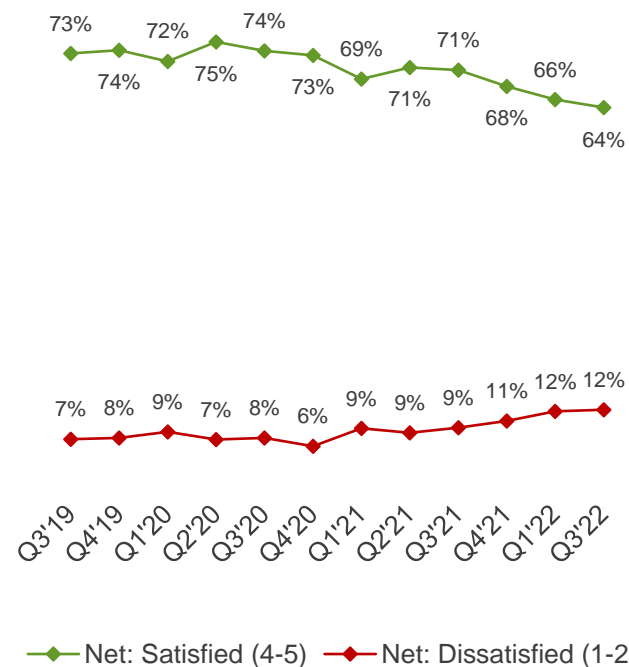
- Those who have attempted to switch their supplier but were not able to (29%)
- Consumers with a long-term illness, physical or mental health illness, physical or mental health problem or disability (16%)

Customer service satisfaction – Q3'22



- 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: Q4'18=3274, 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 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

41% of consumers got in contact with or attempted to contact their suppliers – similar to Q1'22 (38%). Since Q3'21, the number of consumers getting in contact with queries about smart meters or billing increased, which could help explain why consumers were finding it increasingly difficult to contact their supplier in Q3'22.

30% of consumers contacted their supplier in the last 3 months (vs 31% in Q1'22 – this is largely stable over time)

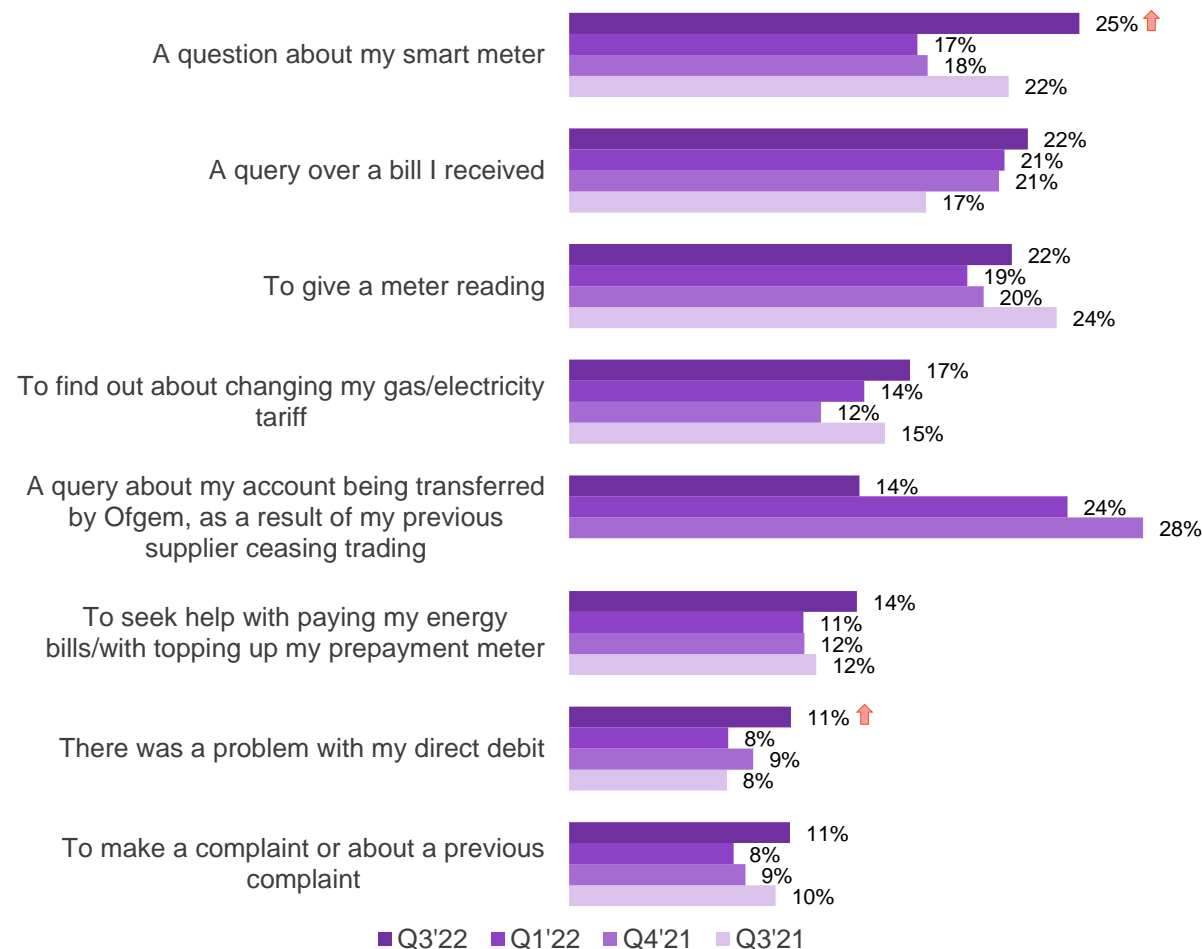
Consumers were most commonly getting in contact due to:

- Queries about their **smart meters** (25%, +8% vs Q1'22) – of these, only 8% also said they complained about their smart meter, suggesting that consumers were getting in touch for a variety of reasons relating to smart meters
- **Billing queries** (22%) – consumers who got in contact about this were much more likely to find it difficult to contact their supplier (47% found it difficult)
- To give a **meter reading** (22%)
- To find out about **changing their tariff** (17%)
- To **seek help with paying their bills** / topping up their meter (14%)

Since Q3'21/Q4'21, significantly more consumers got in contact about:

- **Smart meters** (25%, +7% vs Q4'21)
- **Billing** (22%, +5% vs Q3'21)
- **Changing tariffs** (17%, +4% vs Q4'21)
- Problems with their **direct debit** (11%, +3% vs Q3'21)

Reasons for contact – over time (showing all above 10% in Q3'22)



Base sizes: Q3'21=1135, Q4'21=1124, Q1'22=1187, Q3'22=1217

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? Q1'22=3197, Q3'22=3232

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

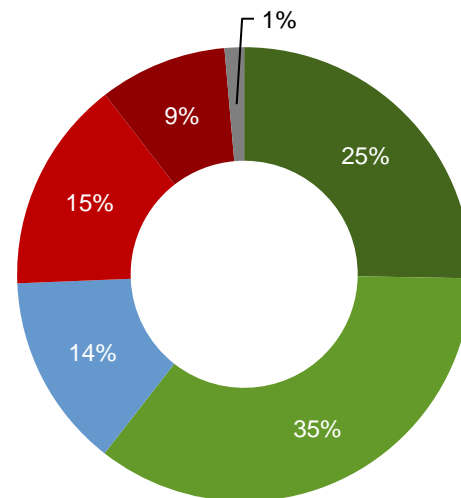
CONTACT EASE/DIFFICULTY

Consumer perceptions of how easy or difficult it was to contact their supplier was stable compared with Q1'22 - 24% found it difficult. This follows a period of steady increase in the number of consumers who found it difficult to contact their supplier.

Those who were **significantly more likely to find contacting their supplier difficult**, and who may therefore need more support, are:

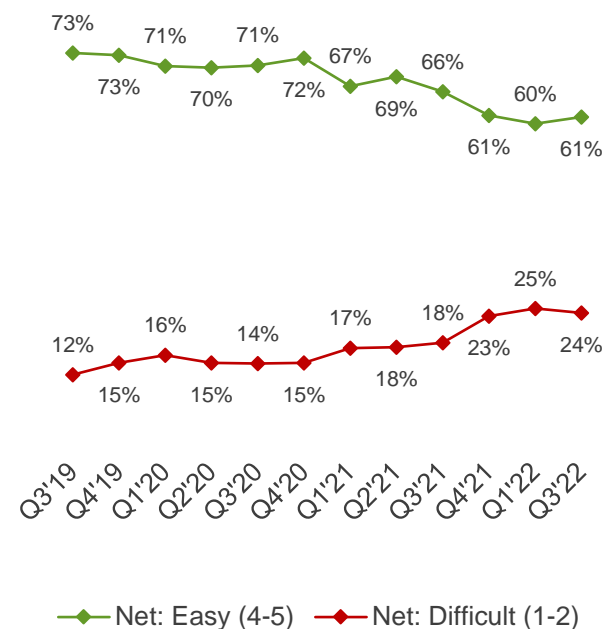
- Consumers who tried to switch but were not able to (39%)
- Consumers with a long-term illness, physical or mental health term illness, physical or mental health problem or disability (29%)
- Those who have a prepayment meter (29%)
- Women (27%)
- Those with an income of £16,000 or less (27%)

Contact ease – Q3'22



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

Contact ease – over time



Their customer service is terrible. They never answer the phone or put you on hold when you call.

Sent email asking for account details but never got back to me, I can never get through to them on the phone.

Every time I phone them I have been on hold more than an hour. Its an overseas call centre and staff don't understand.

Difficult to contact. Almost impossible to get through to on the phone & requesting a password that I don't know to use online service.

Customer service never seem to know what's going on

It is difficult to discuss anything with them, they are rude and unapproachable

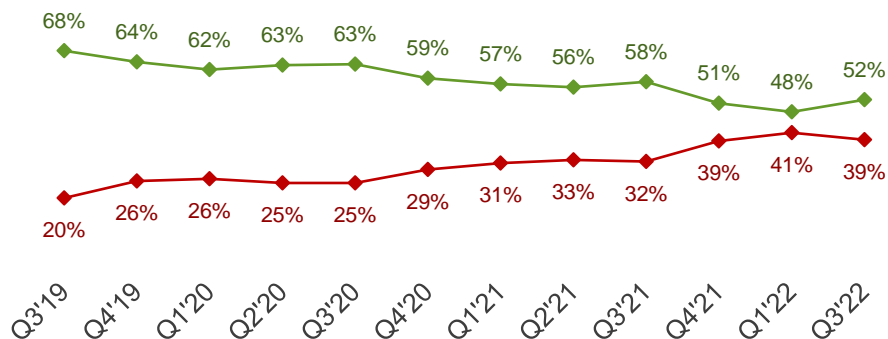
Base sizes: Q4'18=2700, Q1'19=2602, Q2'19=2611, Q3'19=2578, Q4'19=2532, Q1'20=2601, Q2'20=2463, Q3'20=2499, Q4'20=2491, Q1'21=2569, Q2'21=2611, Q3'21=2431, Q4'21=2489, Q1'22=2517, Q3'22=3232
 Q45. Thinking about the last time you tried to contact your supplier how easy or difficult did you find it to contact them?

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

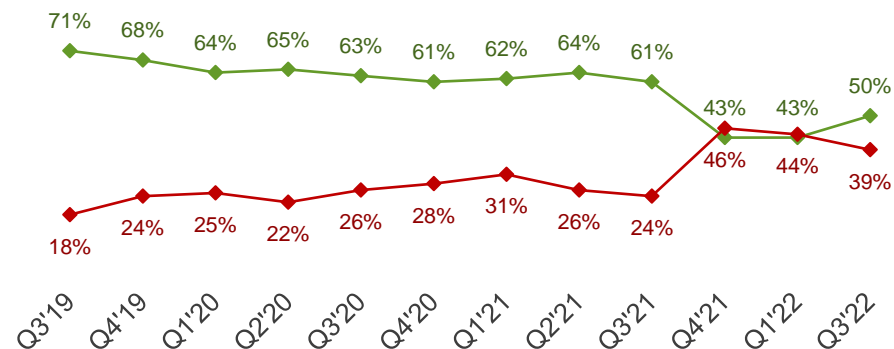
CONTACT EASE/DIFFICULTY – BY CHANNEL

Phone and **live chat** continued to be relatively worse-performing contact channels, with consumers finding **email** and **app** relatively easier when contacting their suppliers. There are no significant movements in how easy each of the contact channels were perceived to be in Q3'22 compared to Q1'22, although all channels reflected the overall trend that contacting suppliers is becoming more difficult over time.

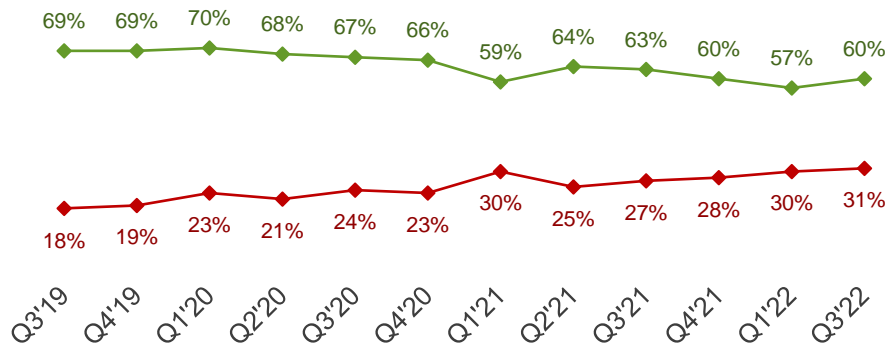
Contact ease – contacted via phone (56%)



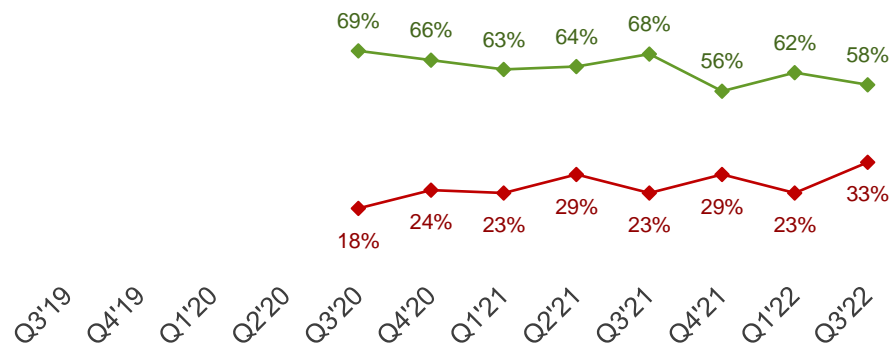
Contact ease – contacted via live chat (15%)



Contact ease – contacted via email (24%)



Contact ease – contacted via app (16%)



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

*Neither easy nor difficult not shown. **Consumers could select multiple channels.

Base sizes: Q3'22, contacted by phone (679), contacted by email (287), contacted by live chat (187), contacted by app (196) 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

BILLING SATISFACTION

Overall, most consumers remained satisfied with billing - 70% of consumers were satisfied with the ease of understanding their bills, while 68% were satisfied with billing accuracy. Both of these measures declined since Q3'21 to their lowest point since tracking began. A number of issues surrounding the complexity of bills were contributing to this.

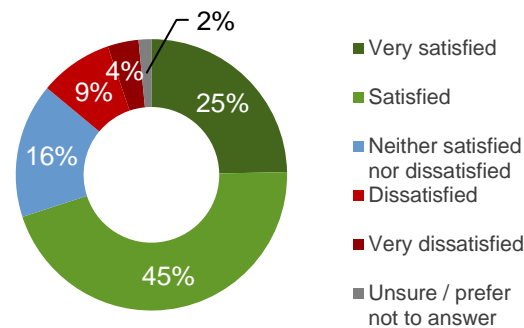
Dissatisfaction with **ease of understanding the bill** was most commonly attributed to:

- Difficulty understanding how the total cost is calculated (29%)
- Difficulty understanding how much energy has been used (25%)
- Difficulty understanding how the numbers on their bill relate to their energy usage (25%)
- Meter readings being rarely or never taken (22%)
- Difficulty understanding the wording / terminology used (20%)

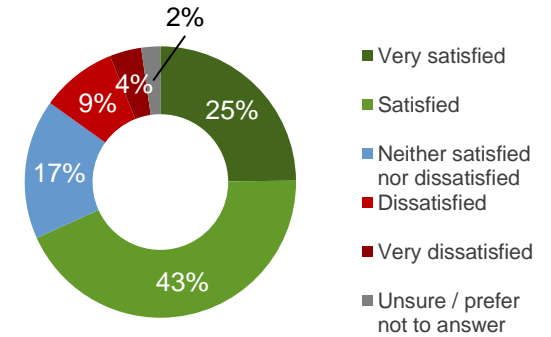
Those significantly **more likely to be dissatisfied** were (% ease of understanding, % accuracy):

- Consumers who have attempted to switch but have not been able to (ease of understanding 28%, accuracy 32%)
- Mixed / multiple ethnic groups (accuracy 31%)
- Consumers receiving financial benefits (ease of understanding 18%)
- Consumers with a long-term illness, physical or mental health term illness, physical or mental health problem or disability (ease of understanding 15%)
- Women (ease of understanding 14%)
- Aged between 18-34 (ease of understanding 17%, accuracy 20%)

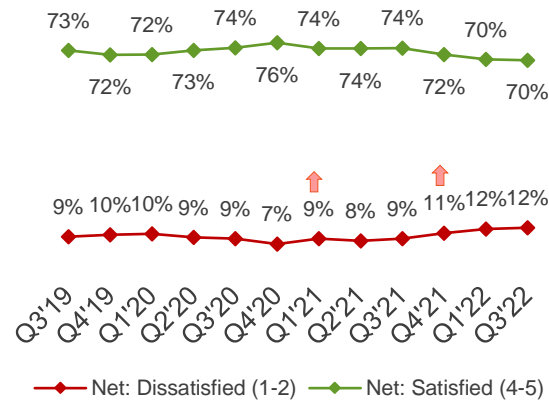
Ease of understanding the bill Q3'22



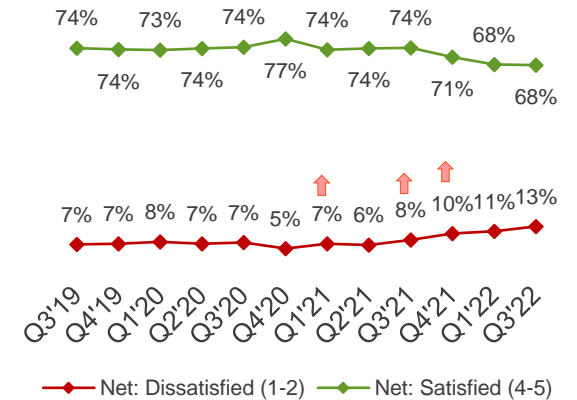
The accuracy of the bill Q3'22



Over time



Over time



Base sizes: Q4'18=2637, Q1'19=2622, Q2'19=2589, Q3'19=2602, 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
 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

In Q3'22, fewer consumers reported receiving information about support in the past 6 months – what to do if they need help paying their bills (48%, -4% vs Q1'22) and a freephone number to call if they have concerns (48%, -3% vs Q1'22).

61% were satisfied with the information they have received from their supplier in the past 6 months (14% are **dissatisfied**)

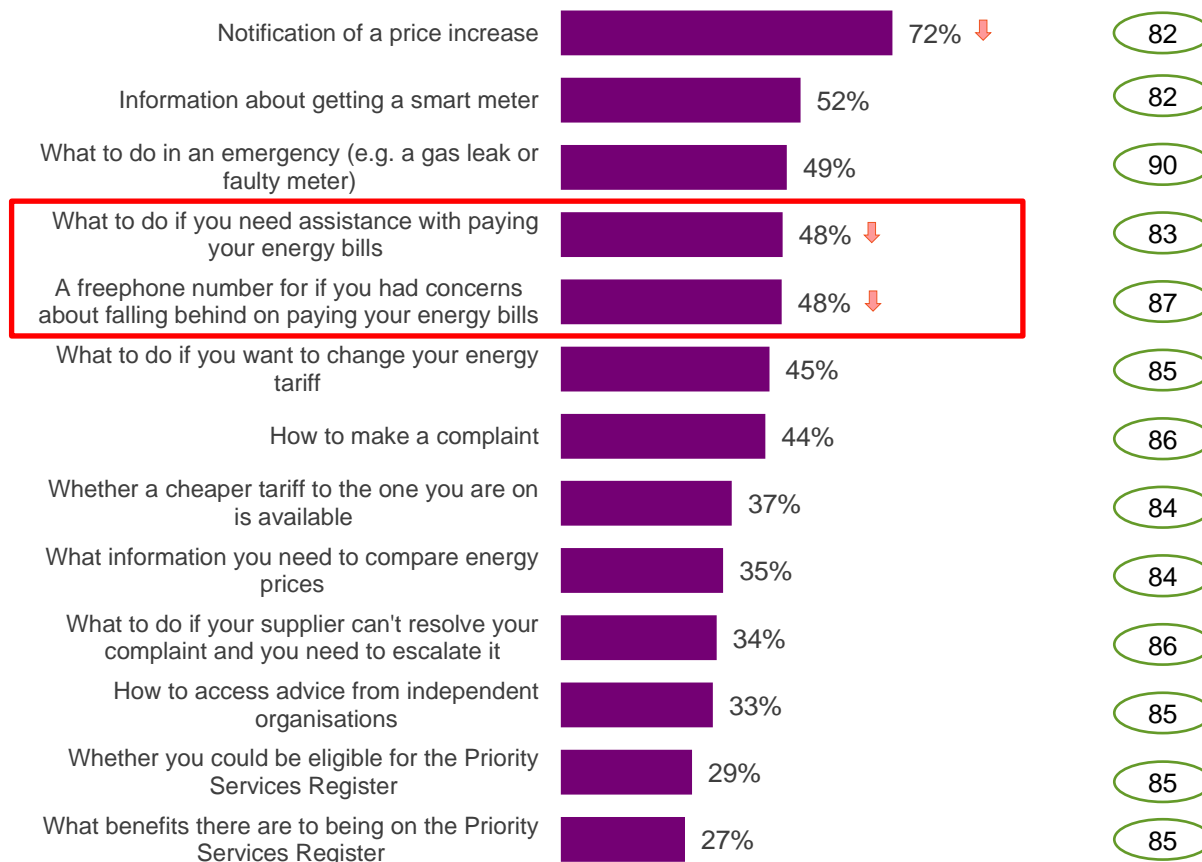
Those who were **dissatisfied** were **less likely to report having received each source** of information. Considering the recent increases in the cost of energy, it remains important for suppliers to continue to communicate with consumers about support options – consumers that receive information were more likely to be satisfied overall with their supplier.

Consumers **significantly less likely** to report having received information about what to do if they need assistance paying their energy bills were:

- Consumers that do not have a smart meter (45%)
- Earning below £16K (44%)
- Those who attempted to switch their supplier but weren't able to (40%)
- Digitally excluded (35%)

% that received sources of information from supplier in past six months

NB. Comparisons are shown to Q1'22 data, collected in March 2022, following a price cap increase. Therefore, decreases seen in recall of receiving price increase notifications may be due to seasonality.



Base sizes: Q1'22= from 1682 to 3197, Q3'22= from 1367 to 3232. *How well the information received met the consumer's needs (5pt scale – Top two boxes shown) Q42_SUM. Do you recall if your supplier has given you information about any of the following in the last six months?

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

COMPLAINTS SATISFACTION

There has been an increase in complaints compared to last quarter (11%, +3% vs Q1'22), with a similar proportion remaining dissatisfied with the way their complaint was handled (49%).

11% of consumers who contacted their supplier in the past 3 months made a complaint in the past 3 months (an increase from 8% in Q1'22).

Of those who made a complaint, only 16% reached the end of the complaint process, with one quarter giving up on pursuing their complaint. 15% have escalated their complaint to the Ombudsman.

The top 5 complaint reasons were:

1. A problem with billing (35%)
2. A problem with a smart meter (27%)
3. The pricing / cost of energy (27%)
4. A problem with a standard meter (22%)
5. The attitude or behaviour of supplier staff (20%)

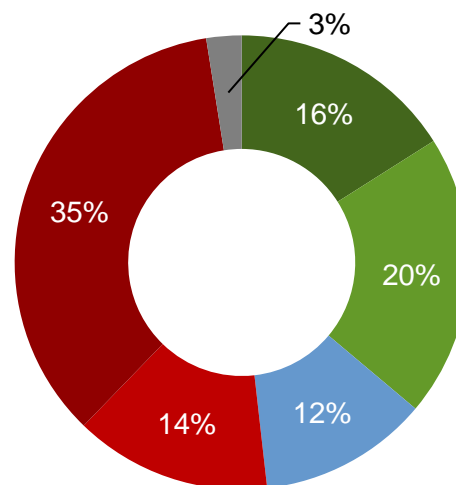
Doubled my electricity and over charged me for usage, even though I have a smart meter which says I haven't used that much

After taking my accounts over they were not honoring the agreement for same terms and conditions they advertised

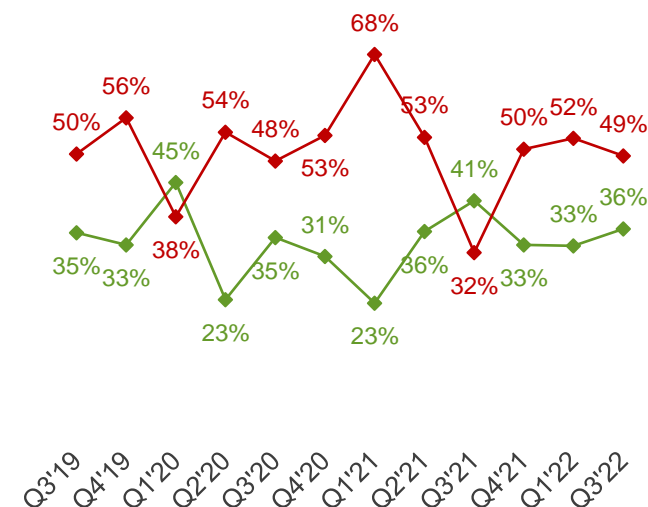
Consumers were most commonly **dissatisfied** with the following aspects of the complaint process (top 3 shown):

- The time it took to deal with their complaint (57%)
- The time it took to get through to someone (56%)
- Customer service received by email (51%)
- Customer service received by phone (50%)

Overall complaint handling satisfaction – Q3'22 **Overall complaint handling satisfaction – over time**



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



- ◆ Net: Satisfied (4-5)
- ◆ Net: Dissatisfied (1-2)

Base sizes: Q3'22=129 (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

SWITCHING SATISFACTION

Dissatisfaction with the switching process overall increased in Q3'22 (16%, +7% vs Q1'22). This was due to a combination of factors relating to both the previous and existing suppliers.

12% recall switching supplier in the past 12 months (vs 13% in Q1'22)

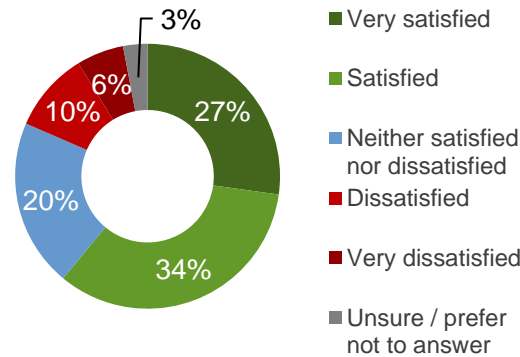
Dissatisfaction with the switching process was commonly being attributed to (top 5 shown):

- It taking too long to receive a final bill (24%)
- The previous supplier and existing supplier providing inconsistent information (24%)
- Being put on the wrong tariff (21%)
- Experiencing poor customer service during the switching process (21%)
- Being charged twice, by both the previous and existing supplier (21%)

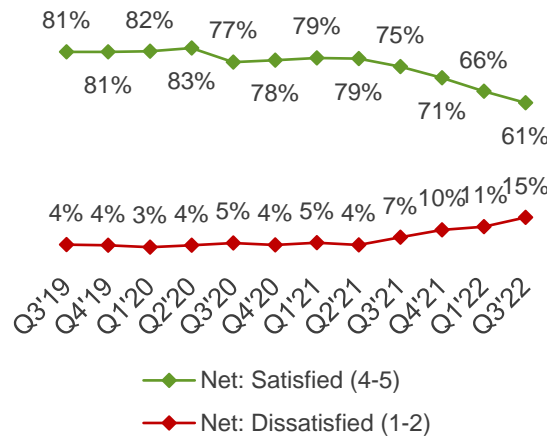
Problem after problem get the account up and running, and after that still problems with the account

Refund from previous supplier took a long time

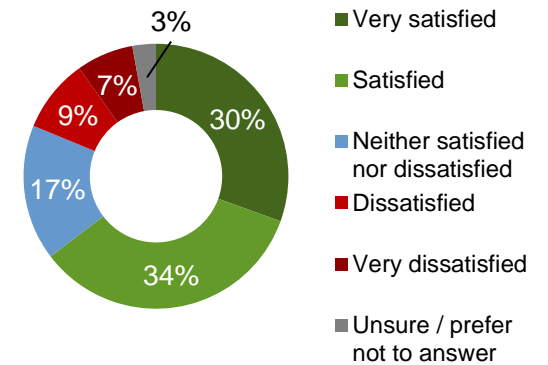
Ease of comparing suppliers + prices – Q3'22



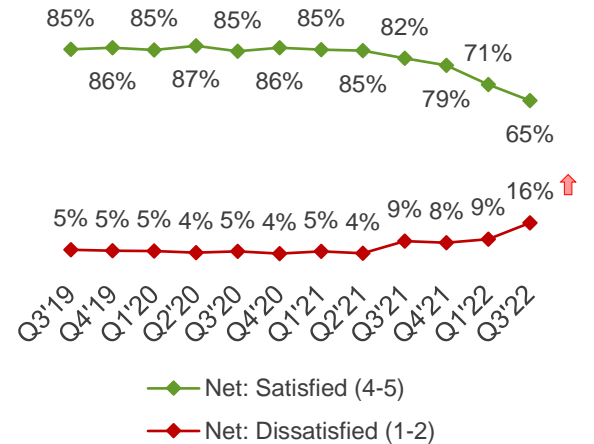
Over time



The switching process overall – Q3'22



Over time



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

Base sizes: Q3'22=387 (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?



AFFORDABILITY CONCERNS

Over half of consumers continued to be concerned that they are going to struggle to pay their energy bills (53%, +3% vs Q1'22), and a third were concerned they might not be able to get through to their supplier if they need to reach them (37%, +4% vs Q1'22). These represent further increases from Q1'22.

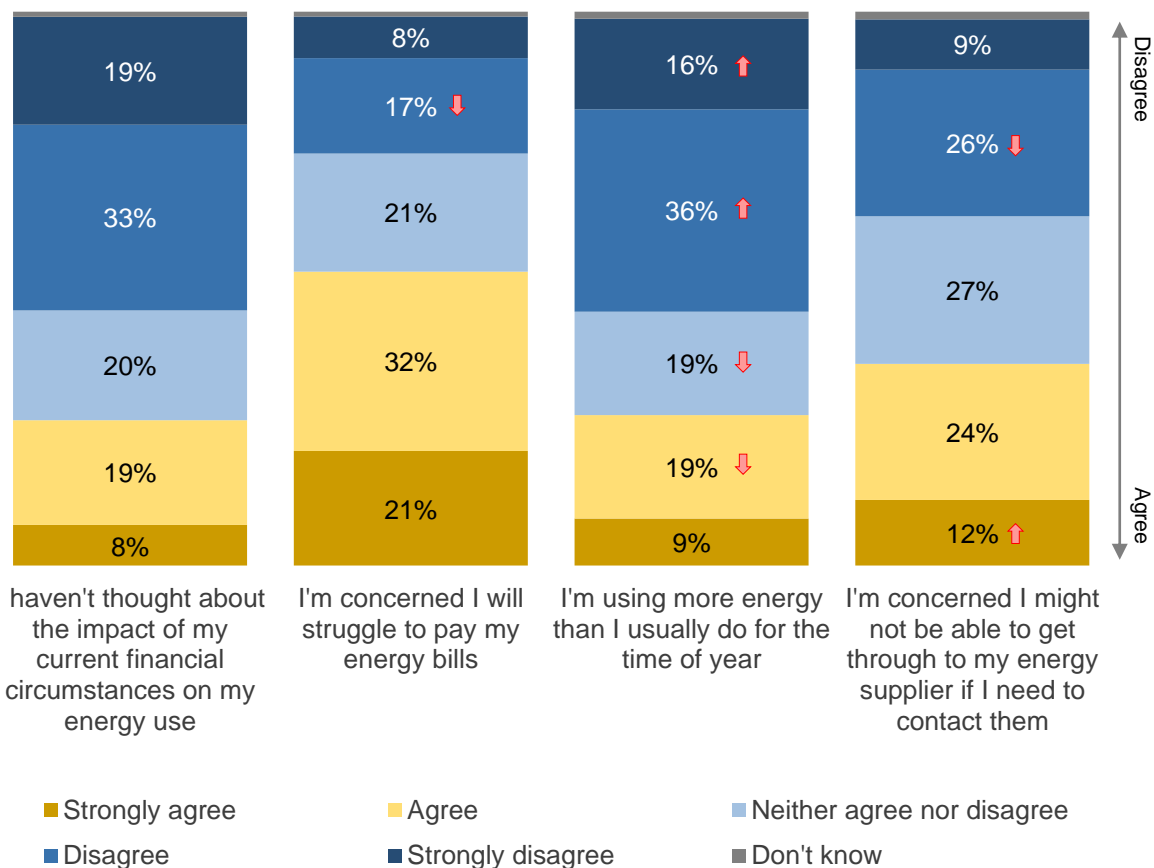
Those **significantly more likely** to be concerned about struggling to pay their energy bills (and who may need more support) were:

- Prepayment consumers (70%)
- Black (70%) or Mixed / multiple ethnic groups (64%)
- Consumers receiving state benefits (67%)
- Women (61%)
- Consumers with a long-term illness, physical or mental health problem or disability (61%)
- Earning less than £45K (57%)

Suppliers should ensure it is easy for consumers to contact them or find relevant information, ensuring consumers with affordability concerns can effectively and consistently get the advice they are seeking.

Well I received both statements three weeks ago. the Direct Debit has trebled and so I got behind with my payments. The estimate was far too high, I am finding it difficult.

Consumers' perceptions of the impact of their current situation on energy use – Q3'22



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

FALLING INTO DEBT – CREDIT METER CONSUMERS

A tenth of credit meter consumers have fallen behind on their bills recently, similar to Q1'22. For most of these consumers, this was due to reasons relating to the rising cost of living, and affordability issues.

11% have fallen behind on an energy bill in the past three months (vs 13% in Q1'22), with consumers paying on receipt of bill more likely to have fallen behind (30%) than direct debit consumers (11%). Seasonal changes to energy usage could be behind this small decrease.

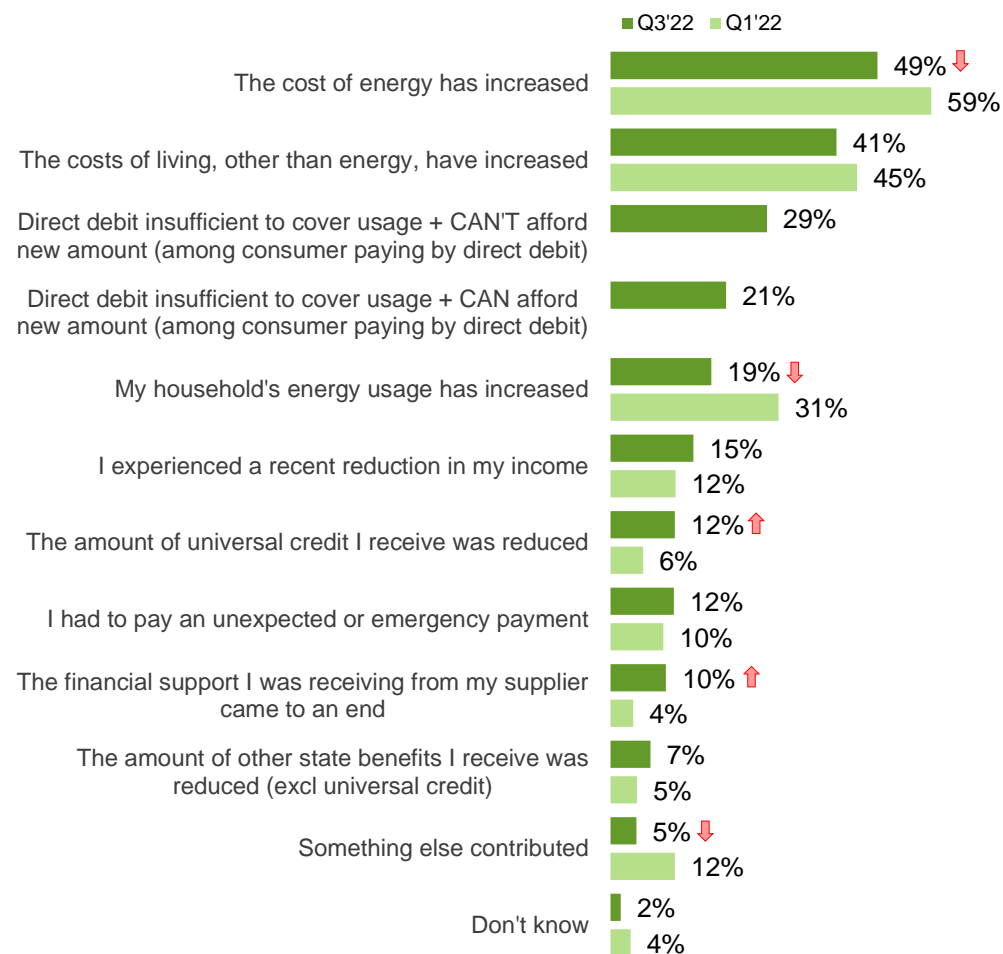
Those significantly **more likely** to have fallen behind on their energy bills, and therefore who need more support, were (% direct debit payment, on receipt of bill payment):

- Those who have switched supplier in the past 12 months (34%)
- Black (32%), Mixed / multiple ethnic (29%), or Asian (27%)
- Aged 18-34 years (32%)

They are saying I owe sixteen hundred pounds and they haven't told me. We are ordinary people, we pay our way. My husband is on a disability allowance. I am his carer. I don't understand it? They are now making me pay that back. It's just an absolute nightmare! My husband is disabled, I don't need this.

Had to leave my job due to ill health, now can't afford to pay

Contributing factors to falling behind – Q3'22 and Q1'22



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

Base sizes: Direct Debit and standard credit consumers=2328
 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?

GETTING SUPPORT – CREDIT METER CONSUMERS

More credit meter consumers have been in contact with their suppliers about support this quarter, although for most this is because the consumer reached out first to the supplier. However, a third of consumers were not satisfied with the support they received (32%, vs 25% in Q1'22), and 1 in 6 weren't offered any help options when they contacted their supplier (16%).

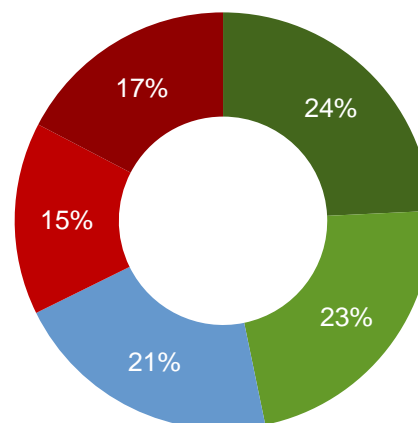
61% of credit meter consumers have been in contact with their energy supplier for help (+18% vs Q1'22)

50% of credit meter consumers who have fallen behind on their bills reached out to their supplier first for help, an increase since Q1'22 (+19% vs Q1'22). Conversely, the proportion of credit meter consumers who have fallen behind on their bills who were contacted by their supplier first is stable at 11% (vs 12% in Q1'22). Suppliers should ensure they are proactively contacting consumers who have fallen behind and those who are at risk of falling behind, to offer them support.

Similar to Q1'22, fewer than half of credit meter consumers that have been in contact for help were satisfied with the support they received (47%, vs. 56% Q1'22). Only just over half of consumers who have been in contact with their supplier for help agreed that:

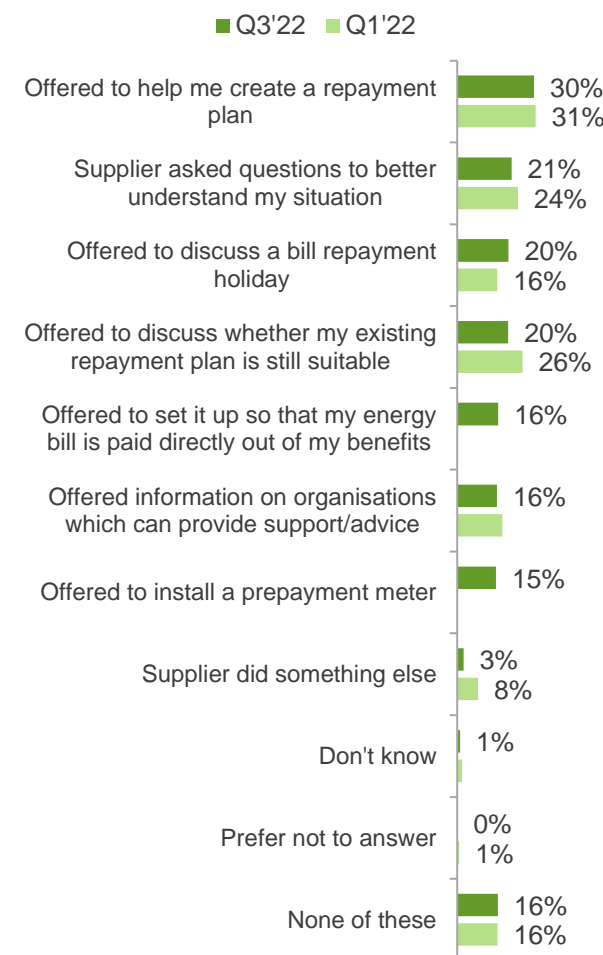
- The billing management help options provided were helpful (52%)
- The person they had contact with was sympathetic (55%)
- Their supplier treated them fairly (56%)

Satisfaction with debt management support – Q3'22



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

Options the supplier offered to discuss – Q3'22 and Q1'22



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

Base sizes: Direct debit and pay on receipt of bill customers who have fallen behind=300 / those who have sought help=182
 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?

RUNNING OUT OF CREDIT – PREPAYMENT CONSUMERS

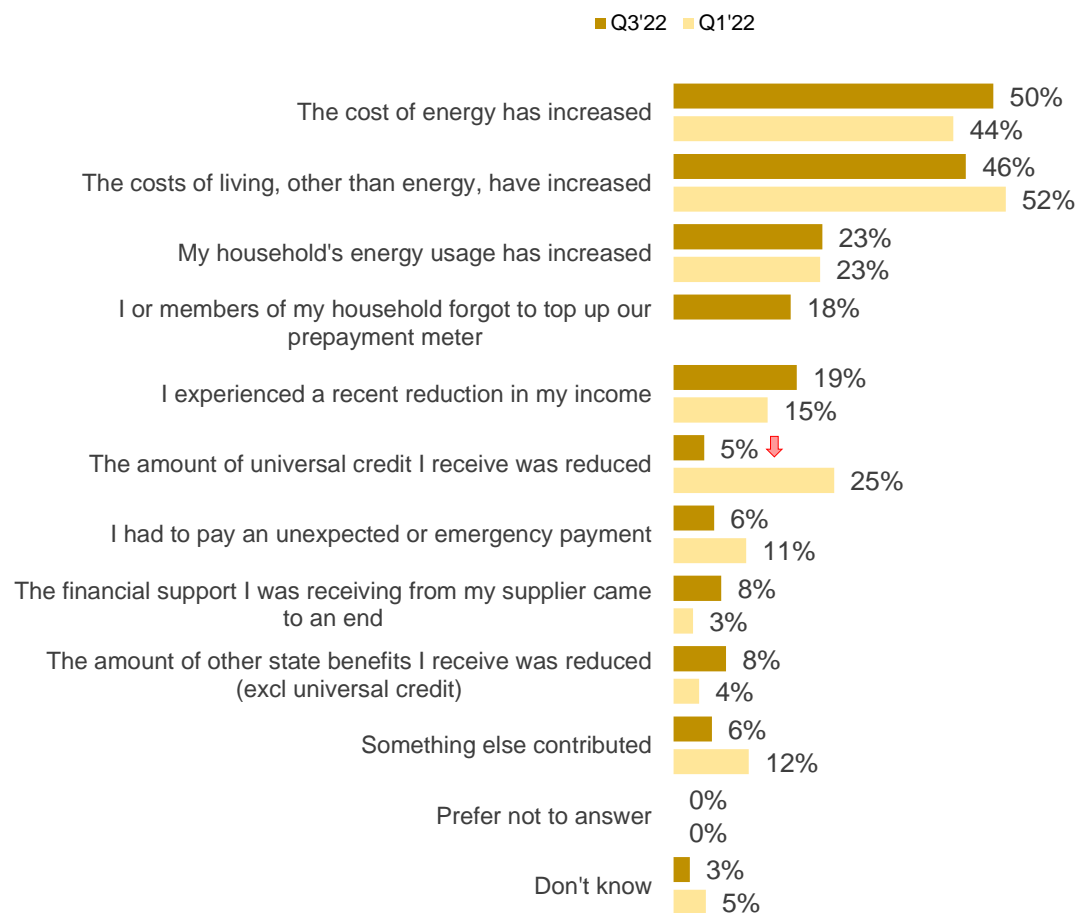
A similar proportion of prepayment consumers have run out of credit as in Q1'22. For most of these consumers, this was strongly related to affordability – with the increasing cost of energy, and rising cost of living, the top reasons for running out of credit.

31% have run out of credit on their prepayment meter in the past three months (vs 30% in Q1'22)

. Around a third of consumers who ran out of credit were disconnected for 7 hours or more, an increase over the previous wave (32%, vs 26% in Q1'22).

- It was (supplier's) fault. Money paid, but not reaching meter due to no signal. Said they wouldn't cut electricity off but they did!*
- Ran out on Saturday, did not get paid till Tuesday*
- I'm prioritising paying off a loan*
- The pay as you go ran out of credit before I expected it*

Contributing factors to running out of credit – Q3'22



Base sizes: Prepayment meter customers=343 / Prepayment customers that have run out of credit =118. Q63A4. What factors, if any, do you think contributed to you being disconnected from your energy supply?

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

GETTING SUPPORT – PREPAYMENT CONSUMERS

Compared to credit meter consumers, fewer prepayment consumers have been in contact with their supplier about support (only 47% compared to 61%). However, prepayment consumers were more likely to be satisfied with the support they received about paying their bills compared to credit meter consumers (63% vs 47%) – they were more likely to have received a support option (only 5% received nothing).

47% of those who have run out of credit on their prepayment meter due to affordability have been in contact with their energy supplier for help (+16% vs Q1'22).

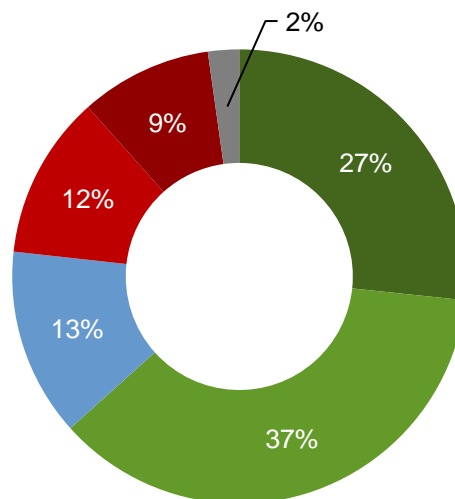
As with credit meter consumers, prepayment consumers were more likely to reach out to their supplier first (36%), with fewer prepayment consumers engaging with suppliers because the supplier proactively contacted them (11%).

For those who have been in contact with their supplier for help – around three-fifths were **satisfied** (63%), and a fifth were **dissatisfied** (21%).

Prepayment consumers who have been in contact with their supplier for help largely agreed that:

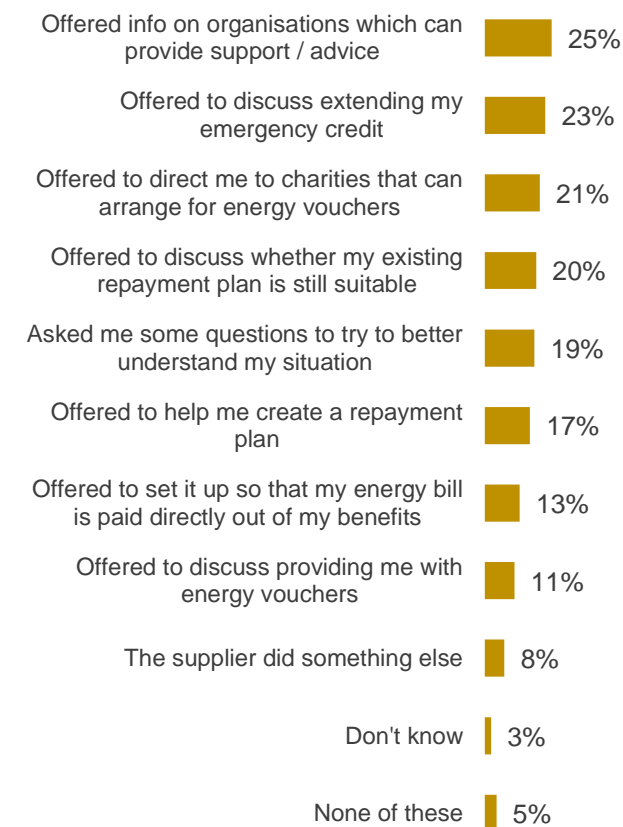
- Their supplier treated them fairly (65%)
- The billing management help options provided were helpful (61%)
- The person they had contact with was sympathetic (55% - there may be room for improvement here)

Satisfaction with debt management support – Q3'22*



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

Options the supplier offered to discuss – Q3'22*



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

Base sizes: Prepayment meter customers that ran out due to affordability=83, and have sought support=38*. 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?



- Most consumers were satisfied with their energy supplier overall in Q3'22. This was static vs the previous quarter but at the lowest levels since tracking began.
 - Behind this, perceptions of the core aspects of customer service (**contact ease**, **ease of understanding bills**, **accuracy of bills**, and overall satisfaction with **customer service**) were also stable compared with the previous wave, remaining at the lowest levels since the survey began.
 - **Complaints** handling satisfaction was consistent with Q1'22 although more consumers are making complaints than in last quarter.
 - Consumer dissatisfaction with the **switching** process overall increased, due to a combination of factors relating to both the previous and existing suppliers.
- There were changes this quarter relating to **affordability and debt support**.
- Around half of consumers continued to report concern about struggling to pay their energy bills. Compared to Q1'22, more credit meter consumers sought support from their suppliers with their bills.
- Of those who received support, just under half of credit meter consumers and just under two in three prepayment consumers were satisfied with the support provided by their supplier – prepayment consumers were more likely to report they received a help option from their supplier.



Contact & complaints

Suppliers should ensure:

- It is easy for consumers to contact them
- Customer engagement processes are managed effectively and provide consistently high quality customer service to consumers

Live chat and phone were the worse performing channels and could be the priority channels for any improvements.



Billing

A number of issues surrounding the complexity of bills (e.g. difficulty understanding how bills are calculated, how much energy has been used, and confusion over what numbers on a bill refer to) are contributing to historically low satisfaction scores.

To improve, suppliers could aim to simplify terminology and explanations about bills as much as possible.

Suppliers should also ensure consumers receive timely, accurate and clear information about their bills and payments.



Switching

As dissatisfaction with the switching process increases, both previous and new suppliers could consider how they can better align to make the switching process easier for consumers.



Support information

Suppliers should be proactively contacting consumers who have fallen behind and those who are at risk of falling behind, through a range of communication methods to offer them support.

It is important to ensure those struggling to pay their bills:

- 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 uses accessible language).



Debt support

Suppliers should follow Ofgem's [key regulatory expectations on suppliers when supporting customers in payment difficulty](#) and consider areas where they can adopt [good practices to better support their customers](#)

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