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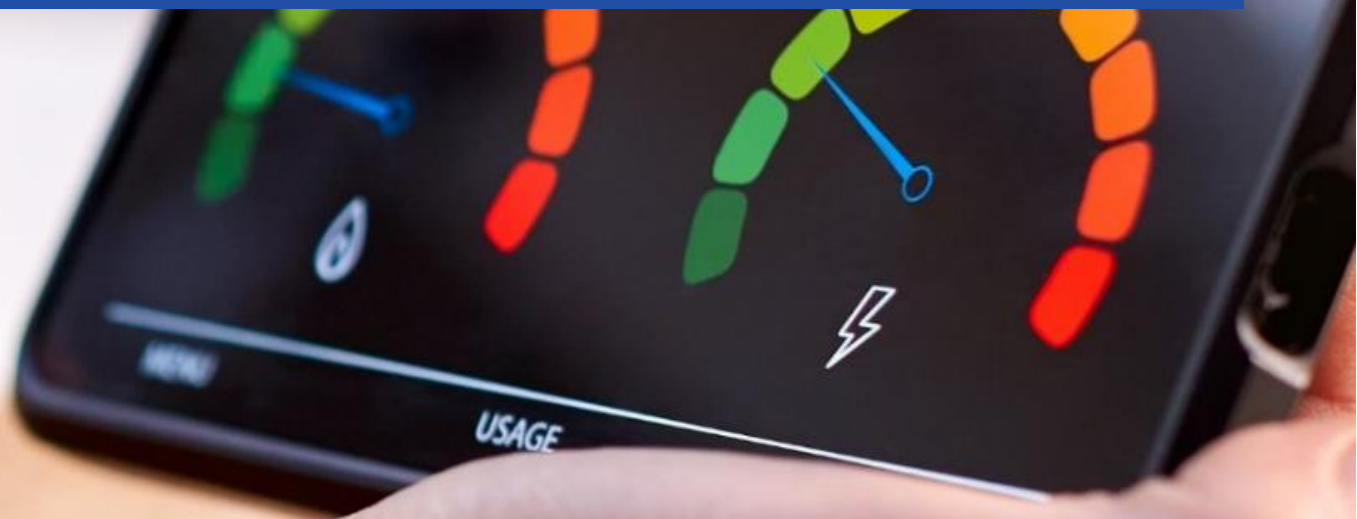
**citizens
advice**

Energy Consumer Satisfaction Survey

Published February 2024

September 2023 report – (Fieldwork August/September 2023)

Prepared by BMG for Ofgem and Citizens Advice



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Ofgem Foreword

While many households continue to struggle with energy bills, it is more important than ever that energy suppliers provide good service to their customers. As Great Britain's independent energy regulator, Ofgem's priority is to protect energy customers. Ofgem is always looking for ways to drive up standards for all consumers, particularly those most vulnerable in our communities.

The consumer and behavioural research that Ofgem conducts is a valuable resource that Ofgem uses to understand the people we serve across England, Wales and Scotland. The Energy Satisfaction Survey is our longest running domestic consumer tracker survey. The survey began in 2018 to understand consumers' perceptions of the quality of service they receive from energy suppliers. The survey continues to do this by tracking consumers' perceptions of several key performance indications, such as consumers' perceptions of the ease of contacting their supplier, and their customer satisfaction with billing, complaints handling, the information provided by their supplier, switching, support provision to those in need, and overall. The survey compliments other sources of customer service performance levels in the energy market, including Ofgem's own data and Market Compliance Reviews and Citizens Advice's Star Rating of suppliers by customer service.

This is the 17th wave of the Energy Satisfaction Survey. The survey took place in August-September 2023 following a comprehensive refresh of the project. The refresh was designed to better capture deeper insights into consumers' experiences of the service levels provided by their energy suppliers. To do this, we boosted the sample size, included more opportunities for consumers who are not prevalent on survey panels to take part, and refreshed the questionnaire. While the survey retains comparability with previous waves, the refresh means the survey is better placed to provide the evidence we need to inform action designed to drive standards.

Ofgem recently published our decision on new and updated rules to make it easier for consumers to contact their supplier, to help provide support for domestic customers who are struggling with their energy bills and to compel suppliers to publish information on their customer service performance, as measured by Citizens Advice¹. The changes were implemented on 14th December 2023 (after fieldwork for this survey wave was collected). This survey therefore provides a baseline against which we expect to see improvements once the new rules have bedded in.

The next wave of research is currently underway (January – February 2024). Ofgem will continue to monitor the evidence on consumers' experiences and outcomes in the energy market to assess whether energy consumers in Great Britain are getting the quality of service and support they need and expect from their suppliers. Beyond regular monitoring, Ofgem will also explore emerging findings with more depth, such as why those who are more financially vulnerable are reportedly less satisfied with the overall service provided by their supplier.

¹ For more information, see: <https://www.ofgem.gov.uk/publications/consumer-standards-decision>

Executive Summary

This tracking survey is designed to provide Ofgem and Citizens Advice with insight into domestic consumers' perceptions about the quality of service delivered by energy suppliers. This survey has been running regularly since 2018.

The survey takes a mixed mode approach to data collection, using online and face-to-face interviewing. The key findings, based on 3,742 interviews with a representative sample of GB energy bill payers, are described below.

Overall satisfaction with energy suppliers

Many of the core supplier satisfaction metrics are stable compared to the last wave conducted in November/December 2022. However, this stability occurs against a backdrop of a broader long-term trend of declining satisfaction, with metrics often well below previous tracking peaks recorded in 2019 and 2020.

This picture is reflected in respondents' overall satisfaction with their supplier. 69% said they were satisfied in August/September 2023, which is stable with 67% in November/December 2022, but well below the peak (78%) reached in April 2020.

Sub-group analysis reveals lots of variation in reported satisfaction across several consumer groups. Almost 4 in 5 (78%) of those doing well financially² reported overall satisfaction with their energy supplier, whereas just half of those facing high cost of living pressures reported overall satisfaction (51%).

Satisfaction with dimensions of customer service

Respondents' satisfaction with energy suppliers' customer service has continued to decline, dropping from 66% in November/December 2022 to 62% this wave. Worryingly, satisfaction with customer service is now 13% points below its peak of 75% in April 2020.

Meanwhile, dissatisfaction with suppliers' customer service remains stable (11%) in comparison to November/December 2022 (12%). When looking at reasons for dissatisfaction with customer service, the top reasons cited were respondents not being able to contact at the time they needed (37%), not feeling they were being listened to (34%) and it taking a long time to resolve the query (34%).

As was the case with overall satisfaction, satisfaction with customer service is lower among those highly financially vulnerable (49% cf. 71% doing well).

Encouragingly, fewer this wave found it difficult to contact their supplier (26% compared to 23% in Nov/Dec 22).

Experiences of customers struggling financially

On average, 12% of respondents report having fallen behind on their bills or run out of credit in the last three months due to affordability issues. However, this average risks masking significant differences across payment methods. One in five (21%) prepayment customers have run out of credit and over a

² To provide a summary metric of a respondent's overall financial circumstances in relation to the rising cost of living, we have combined three metrics – saving, debt and unexpected expenses – into classifications of financial vulnerability as a result of the cost of living crisis. Please see the appendix for a full explanation.

quarter (27%) of standard credit customers have fallen behind with their bills. This contrasts with a comparatively smaller proportion (9%) of direct debit customers who have fallen behind with their bills.

Worryingly, of those who fell behind on bills or ran out of credit for affordability reasons in the past 3 months, almost one in three (32%) did not have any contact with their supplier about this. Of those who fell behind on bills or ran out of credit for affordability reasons in the last 3 months, only 17% said that their supplier reached out proactively to offer them support, with nearly half (48%) reaching out to their supplier themselves.

The majority (63%) of those respondents who had contact with their supplier about falling behind on their bills were satisfied with the support they received, consistent with November/December 2022. The need for improvement in supplier support for those struggling financially remains, particularly as the percentage behind on their bills continues to slowly rise and the rate of consumers experiencing affordability issues is yet to decline³.

Experiences and perceptions of smart meters

The survey also measures consumer satisfaction with other interactions and services including smart meters, the Priority Services Register, switching suppliers and changing payment types.

The survey paints a mixed picture of respondents' attitudes towards smart meters. Three in five (62%) reported having a smart meter, a slight increase on November/December 2022, yet one in five (19%) said that they do not have a smart meter and would not consider getting one.

Issues with smart meters are not uncommon⁴, with over a third (37%) of households with a smart meter in the prior three months to taking the survey saying that they had an issue with their smart meter⁵. When looking at smart meter issues experienced by payment method, issues were more prevalent among prepayment meters customers (46%) and those paying by standard credit (60%). In comparison, only 1 in 3 (33%) direct debit customers with a smart meter reported an issue.

Priority Service Register

Over one third (35%) of respondents reported that either they or someone in their household is on the Priority Services Register (PSR). As set out in the latest Consumer Impacts of Market Conditions survey report, this is well below the percentage who are likely eligible (60%)⁶. That said, it is worth noting that the eligibility criteria for the Priority Services register is broad.

Satisfaction levels were generally high among those that say they registered on the PSR, with almost two-thirds (64%) expressing satisfaction with the services delivered through the PSR. However, there is some variation in satisfaction across different groups. For example, those aged 65 or over reported lower satisfaction (57%) compared to the overall average satisfaction rate (64%).

³ Ofgem, [Consumer Impacts of Market Conditions Survey](#), Wave 4, 2023

⁴ Respondents were asked: *In the last 3 months, have you encountered any of the following issues with your smart meters?* Respondents were asked to select from the following codes: *My smart meter was not sending automatic readings to my energy supplier, my in-home display stopped working properly, my smart meter (not my in-home display) stopped showing any information, I received an inaccurate bill from my energy supplier, my prepaid credit top-up did not show on my in-home display, my prepaid credit top-up did not go into my account, other.*

⁵ The survey question did not capture the timeframe of the issue experienced, so will have captured both longer term and temporary issues.

⁶ Ofgem, [Consumer Impacts of Market Conditions Survey](#), Wave 4, 2023

Switching supplier

Consumer satisfaction with the process for switching supplier shows signs of recovery. Among the 7% of respondents who had switched suppliers, 4 in 5 (82%) were satisfied. This reflects a rebound following the decline observed from late 2021 to November/December 2022, where satisfaction had fallen to 67%.

Background and research objectives

Background

This report, setting out results from August/September 2023 (wave 17), is designed to provide Ofgem and Citizens Advice with evidence on consumers' experiences and outcomes in the energy market. It helps to assess whether energy consumers in Great Britain are getting the quality of service and support they need and expect from their suppliers.

Conducted by BMG Research, a representative sample of 3,742 domestic energy consumers across Great Britain were surveyed. The survey encompasses various topics, including consumers' overall satisfaction, perceptions of various dimensions of customer service, and experiences relating to supplier support for those struggling with energy affordability.

Research objectives

This research is intended to answer four overarching questions:

- 1. how satisfied are consumers with the overall service their energy suppliers are providing?**
 - what is the overall satisfaction with energy suppliers, and how does this compare over time?
 - how do satisfaction levels and experiences vary across different customer groups (e.g. how they pay for energy, vulnerability characteristics and other demographic factors)?
 - what are the reasons behind customer satisfaction and dissatisfaction?

- 2. how satisfied are consumers with key customer service dimensions?**
 - how satisfied are consumers with the customer service provided by their suppliers?
 - what are the levels of satisfaction with the billing process?
 - what are customers' experiences of contacting suppliers?
 - what is the customer experience when making complaints?
 - are consumers satisfied with the information they receive from their suppliers?

- 3. what are the experiences of customers struggling financially?**
 - which groups are most likely to be falling behind or running out of credit?
 - what is the experience of consumers falling into debt?
 - are they in contact with suppliers about receiving help and support?
 - for prepayment meter customers, what support are they receiving if they run out of credit?

- 4. how satisfied are consumers with other supplier interactions and services, including switching?**
 - what are consumers' experiences of smart meters?
 - what are the practical challenges with topping up?
 - what are the experiences of PSR services from the supplier?
 - what are the levels of satisfaction with the process of switching suppliers?
 - what are the experiences of consumers changing payment type?

Method

Timing of fieldwork

This is the first wave of this survey run by BMG Research. Fieldwork for this wave was conducted from 30 August to 18 September 2023. Comparisons to the previous wave are for 8 November to 5 December 2022.

Data collection method

Quotas were set to ensure a representative sample of the GB population of households⁷. Further detail on this is available [here](#). Results were weighted overall by age, gender, region, indices of multiple deprivation (IMD), ethnicity and payment type. The methodology has been updated but several steps have been taken to ensure comparability with the previous waves:

- **Sampling:** the sampling approach remains broadly aligned with previous waves. An online panel with Savanta targeted c. 3,000 energy consumers. The small telephone component was replaced, with all digitally excluded participants now taking part via a face-to-face interview instead. We have also introduced river sampling to target digitally enabled consumers who are not prevalent on panels, improving the overall representativeness of the survey.
- **Weights:** existing weights on age, gender and region were updated, and IMD, ethnicity and payment type were added to make the weights more up-to-date and more robust. Tests were carried out to ensure weights have a similar effect on data as the old weighting targets. Payment type was added as a weight to offset the oversampling. Those paying by prepayment meter or standard credit were oversampled to give sufficient base sizes for analysis, and then downweighted to ensure representativeness.
- **Questionnaire:** most questions were retained for the purpose of tracking. Some new questions were added to reflect Ofgem's and Citizens Advice's current research needs. Questions were only tracked where questions remained the same and results are comparable. Questions were cognitively tested to ensure they were understood and easy to answer.

The latest wave comprised 3,742 respondents in total. The data was collected through a combination of three methods:

- 3,311 consumers took part via online interview panels to capture the digitally enabled population
- 210 consumers participated through online river sampling to capture those who are digitally enabled but less present on panels
- 221 digitally excluded consumers were interviewed face-to-face

This included a boost of 310 prepayment and standard credit customers via online panel and face-to-face interviews. These customers were boosted to increase the sample size to allow for more robust

⁷ Household reference person has always been used for this study and was retained for wave 17 to ensure comparability with previous waves. The household reference person is the member of the household in whose name the accommodation is owned or rented or is otherwise responsible for the accommodation. Please note this approach differs slightly to Ofgem's Consumer Impacts of Market Conditions survey which uses quotas on individuals rather than Household Reference Person. This means that the Consumer Impacts of Market Conditions survey has a slightly younger profile than this Energy Satisfaction survey.

analysis of these payment types. Boost surveys were combined with the main sample and then downweighted to ensure the overall results remained representative.

For more information on the methodology, please refer to the accompanying technical report published [here](#).

Notes on statistical significance

Given that the survey uses quotas rather than random probability sampling, statistical significance is indicative only.

Where significant differences between sub-groups and the total sample are identified, 'total sample' represents the total sample minus the sub-group in question.

Significance differences are calculated at a 95% confidence level and shown on charts throughout the report with the use of an up ▲ or down ▼ arrow. Only where a difference is statistically significant is it discussed in the report analysis.

A sample size of this size carries a maximum confidence interval of $\pm 1.67\%$ at the 95% level of confidence⁸.

⁸ A 95% confidence level strikes a balance between being precise and offering a high level of certainty. A 95% confidence interval means that if we were to repeat the study multiple times, 95% of the time, the true population parameter would fall within the calculated interval. This is a commonly accepted level of confidence in social research.

Detailed Findings

How satisfied are consumers with the overall service provided by their supplier?

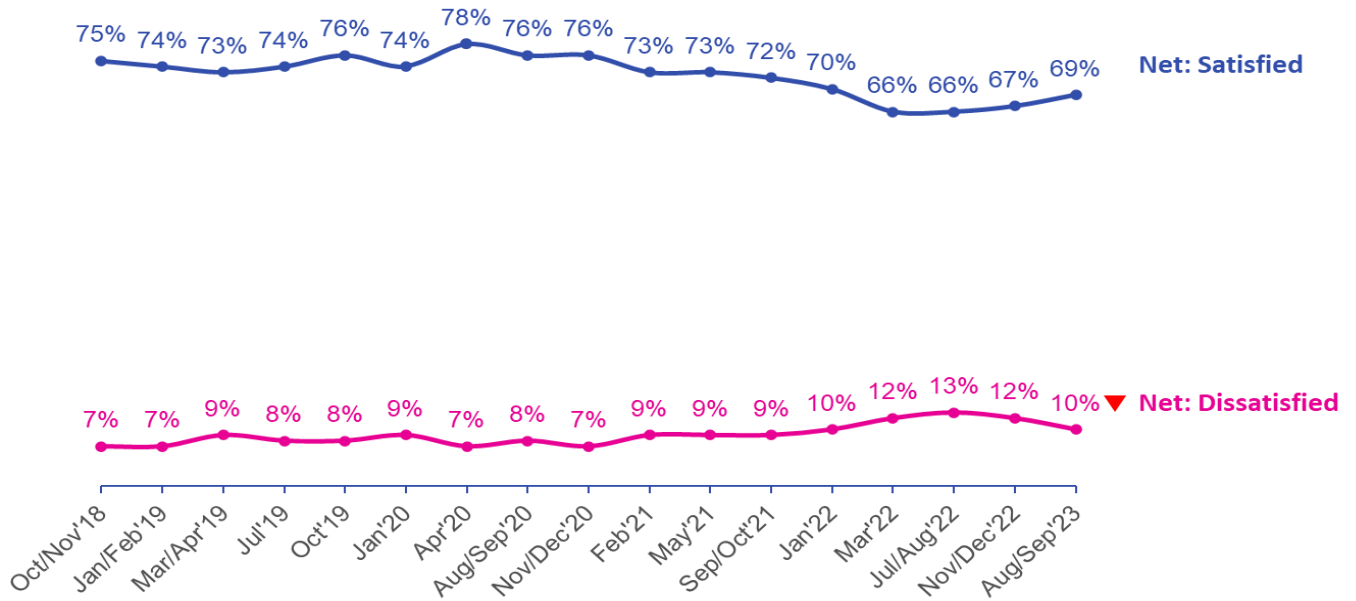
Overview of findings

- **Overall satisfaction was stable, but still well below the previous peak for the tracking survey:** while satisfaction remained consistent with November/December 2022 at 69%, it was well below the peak of 78% recorded in April 2020 (a 9 percentage point gap).
- **There was a notable disparity in satisfaction between those doing well financially and those financially vulnerable:** 78% of those classified as doing well financially were satisfied overall, compared to 51% of those classified as highly vulnerable to financial pressures. This suggests support may not be going far enough for those who are financially vulnerable.
- **Many 'passively satisfied':** while some attributed their satisfaction to good customer service, a notable portion expressed satisfaction simply because they had not encountered any problems.
- **Poor customer service was cited as a core reason for dissatisfaction with overall service:** of those who were dissatisfied and asked to provide reasons for this, a notable minority cited poor customer service.

Overall satisfaction

While overall satisfaction has remained stable with November/December 2022 at 69% (cf. 67% in the previous wave), it remains 9 percentage points below the peak of April 2020. Meanwhile, dissatisfaction declined from 12% to 10%, but again remains above previous lows.

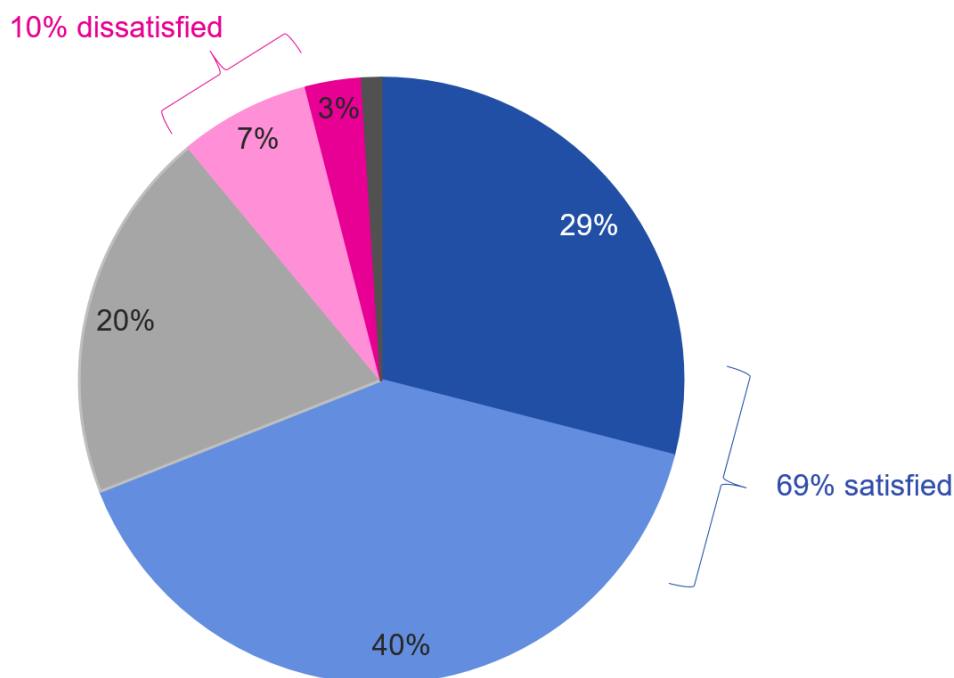
Figure 1: Overall satisfaction with supplier over time



A5: Overall, how satisfied or dissatisfied are you with [supplier] as your supplier of <FUEL TYPE>?
 Base: all respondents, August/September 2023 (3,742)

In the latest wave, most of those classified as satisfied were 'satisfied' (40% of total respondents) rather than 'very satisfied' (29% of total respondents).

Figure 2: Overall satisfaction with supplier



■ Very satisfied ■ Satisfied ■ Neither ■ Dissatisfied ■ Very dissatisfied ■ Unsure

A5: Overall, how satisfied or dissatisfied are you with [supplier] as your supplier of <FUEL TYPE>?

Base: all respondents, August/September 2023 (3,742)

Data labels not shown for values below 3%

Several groups of consumers were more likely to be satisfied overall with their supplier. Perhaps the most obvious was the extent to which people were financially comfortable, something explored in more depth later in this report. Consumers with higher household incomes, particularly those earning above £80,000, reported higher satisfaction (78%) compared to those with incomes ranging from £5,000 to £20,000 (69%). Likewise, those who had not fallen behind/run out of credit for affordability reasons were more likely to be satisfied (70% satisfied compared to 62% who had fallen behind/run out of credit for affordability reasons).

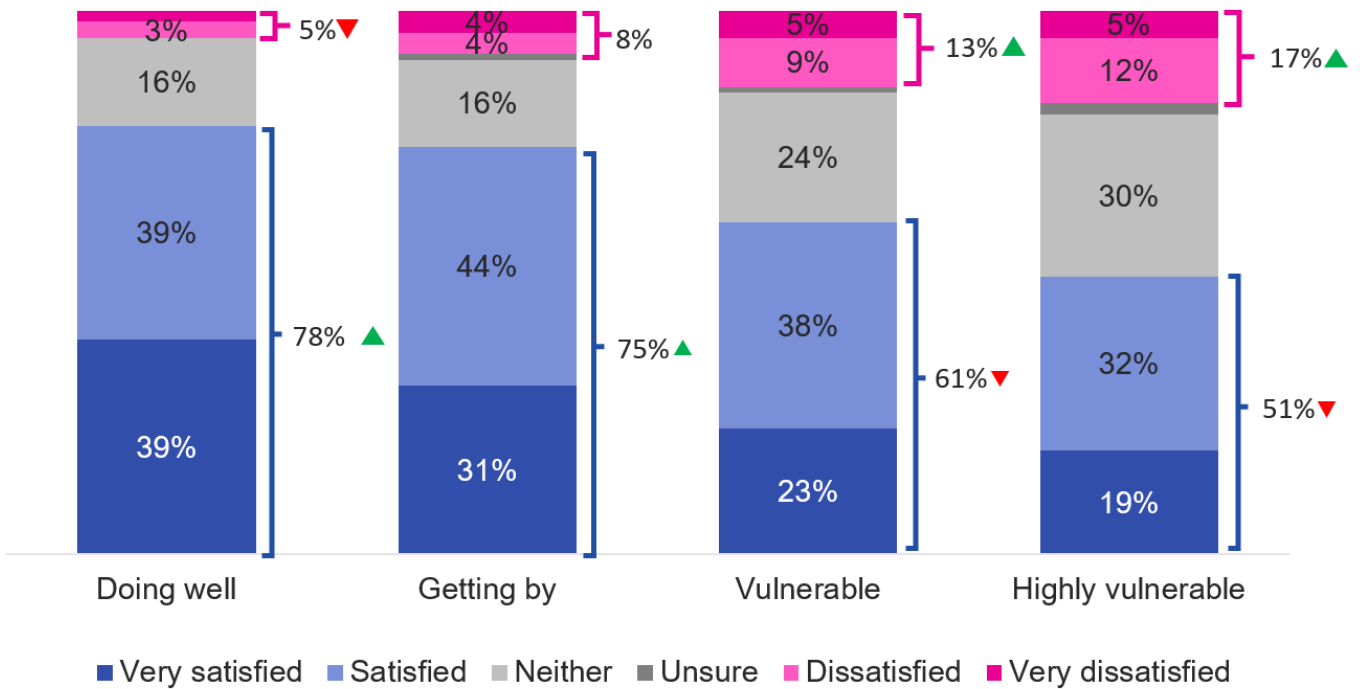
Satisfaction also correlated with a range of demographic factors. For example, consumers aged 65 and above reported higher satisfaction rates than those aged 18-34 (74% compared to 68%). Likewise, homeowners had higher satisfaction than renters (71% compared to 66%). These factors correlate with financial stability, with older homeowners typically more financially stable than younger renters.

The type of energy tariff and payment method also correlated with satisfaction. Fixed rate tariff users reported higher satisfaction levels compared to those on variable tariffs (74% on gas fixed rate satisfied, 75% on electricity fixed rate satisfied cf. 69% and 68% for gas and electricity variable rate). Thinking of payment type, direct debit payers reported higher satisfaction (71% satisfied cf. 64% on standard credit and 66% on prepayment meter). Additionally, those who have a smart meter and those who have

switched suppliers successfully in the past 12 months were more satisfied. By contrast, those who contacted their supplier by phone were more likely to be dissatisfied (17%).

There is considerable variation in satisfaction by the cost of living groupings as defined in the [appendix](#). Whereas around three quarters (78%) of those classified as 'doing well' were satisfied, this reduced to half (51%) of those classified as 'highly vulnerable'. 5% of those classified as doing well were dissatisfied, which compares to as many as 17% among those classified as highly vulnerable.

Figure 3: Overall satisfaction by financial vulnerability



A5: Overall, how satisfied or dissatisfied are you with [supplier] as your supplier of <FUEL TYPE>?
 Base: August/September 2023, doing well (1,055), getting by (453), at risk (661), highly vulnerable (602)
 Data labels not shown for values below 3%
 Significant differences are shown for summary figures rather than each point of the scale

Reasons for dissatisfaction

The 10% of respondents who were dissatisfied with their supplier were asked an open question so they could provide their reasons for this. Analysis of 64% of the verbatim comments chosen at random found that many of those dissatisfied spontaneously mentioned that prices were too high for them, while a significant minority cited poor customer service. A small number of respondents mentioned other issues including issues with bills and difficulties with payment. There were also a handful of mentions of not getting enough financial support.

Unsurprisingly, those struggling to keep up with their household bills and financial commitments were more likely to mention price.

The following verbatim quotes illustrate the type of feedback that was provided.

*“Didn’t get warm home discount and the prices have gone up loads.”
(Aged 35 - 49, digitally excluded, prepayment meter)*

*“Price is ludicrous, making huge profits when we are all struggling.”
(Aged 35 - 49, digitally excluded, direct debit)*

*“Customer service very poor. Smart meter has been broken for 15 months. No plans to rectify it. Can't believe what they say on the phone.”
(Aged 65+, digitally enabled, direct debit)*

Reasons for satisfaction

Among the 69% of respondents who were satisfied, a selection of verbatim comments as to reasons for satisfaction were coded at random (56% of comments). The key reasons were a lack of any issues, followed by good customer service and competitive/affordable prices. Other reasons for satisfaction mentioned by relatively few respondents were good communication and the supplier being a good company to deal with.

The following verbatim quotes illustrate the type of feedback that was provided.

*“They have given us assistance with bills recently and very polite.”
(50 – 64, digitally enabled, prepayment meter)*

*“No problems, I get electric and pay the bill when it comes in.”
(50 – 64, digitally enabled, standard credit)*

*“They offer a good rate for their energy and I have never had any problems when it comes to using them.”
(25 - 34, digitally enabled, prepayment meter)*

How satisfied are energy consumers with the dimensions of customer service provided by their suppliers?

Overview of findings

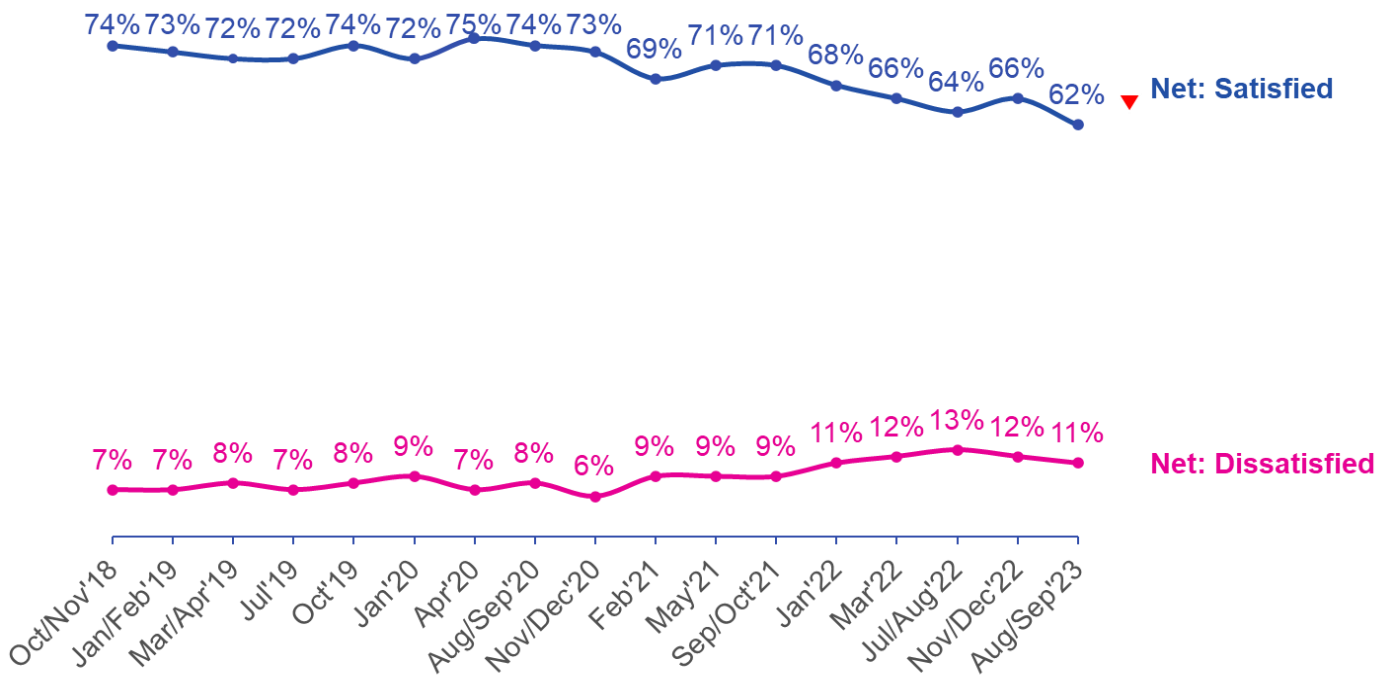
- **Satisfaction with customer service has declined:** satisfaction with customer service declined by 4 percentage points (62% cf. 66% in August/September 2023). This means satisfaction is now 13 percentage points below its highest point in April 2020, continuing a long-term downward trend.
- **Those more financially vulnerable to the cost of living tended to be less satisfied:** as was the case with overall supplier satisfaction, rising cost of living pressures correlate with customer service ratings. Satisfaction tended to be lower among those classified as most financially vulnerable (49% cf. 71% doing well).
- **Difficulty getting in contact is the top reason for dissatisfaction:** among those dissatisfied (37%), the top reason was the supplier being difficult to contact. However, a myriad of other factors were mentioned, such as their supplier not listening (34%), it taking a long time to get queries resolved (34%), and not being able to get queries resolved (31%). Note that while finding it difficult to contact suppliers is the top reason for dissatisfaction, metrics elsewhere suggest that contact ease is improving (see page 23).

Satisfaction with customer service

Satisfaction with customer service continued its long-term decline, reaching 62%, the lowest level recorded in this tracker so far. This is 13 percentage points below the peak in April 2020. Of the 62% satisfied, 27% were very satisfied, and 36% were satisfied.

While satisfaction declined, it was the percentage saying unsure and neither satisfied nor dissatisfied that increased (from 1% to 3% and 21% to 24% respectively), rather than the share of those dissatisfied increasing.

Figure 4: Satisfaction with customer service



A7: Overall, how satisfied or dissatisfied are you with the customer service you have received from [supplier]?
 Base: all respondents, August/September 2023 (3,742). Neither satisfied nor dissatisfied, unsure and prefer not to say are not shown.

As was the case with overall satisfaction, several groups were more/less likely to report satisfaction or dissatisfaction with the customer service they had received from suppliers. Again, a strong correlation between satisfaction and the cost of living groupings can be observed, with those who were categorised as ‘doing well’ in the face of the cost of living crisis more satisfied with customer service than those classed as highly vulnerable (71% compared to 49%). Those financially ‘vulnerable’ and ‘highly financially vulnerable’ were significantly more likely to be dissatisfied with the customer service received from their supplier in comparison to those ‘doing well’ and ‘getting by’ (13% and 19% Cf. 6% and 9%).

When asked to provide reasons for dissatisfaction with customer service, those highly financially vulnerable were significantly more likely to report that they were not able to access suitable help or information from their supplier when they needed it in comparison to those ‘doing well’ (36% Cf. 22% doing well). Linked to this, we also saw those with a household income of £80k or more were more satisfied than those with a household income of less than £20k (71% compared to 62%), and those not in financial difficulty (able to keep up with their bills and commitments) more satisfied than those in financial difficulty (66% compared to 56%).

Experience with suppliers also impacted satisfaction with customer service. Those who had switched suppliers were more satisfied than those who attempted to switch but were unable to (75% compared to 42%), as were those who successfully contacted their supplier (70% compared to 38% who tried to contact their supplier).

Other factors linked to energy usage also correlate with satisfaction. For example, consumers on fixed rate tariffs for gas and electricity were more likely to be satisfied (69% and 70%, respectively) compared to those on variable tariffs (61% and 60%). Additionally, those with a smart meter were more satisfied (66%) than those without (57%).

Reasons for dissatisfaction with customer service

The top reasons cited for customer service dissatisfaction were that it was difficult to contact at the time respondents needed (37%), not being listened to (34%), and it taking a long time to get the query resolved (34%). A lack of resolution (31%) and lack of staff knowledge (29%), as well as an inability to access suitable help/information (27%) were also cited as reasons for dissatisfaction with customer service.

Around a quarter mentioned receiving conflicting information (23%), a lack of response (23%) and the unfriendly tone of staff (22%).

Figure 5: Reasons for dissatisfaction with customer service



A8. You mentioned that you are dissatisfied with the customer service you have received from [supplier]. Could you say why?

Base: dissatisfied with customer service, August/September 2023 (403)

Views on billing

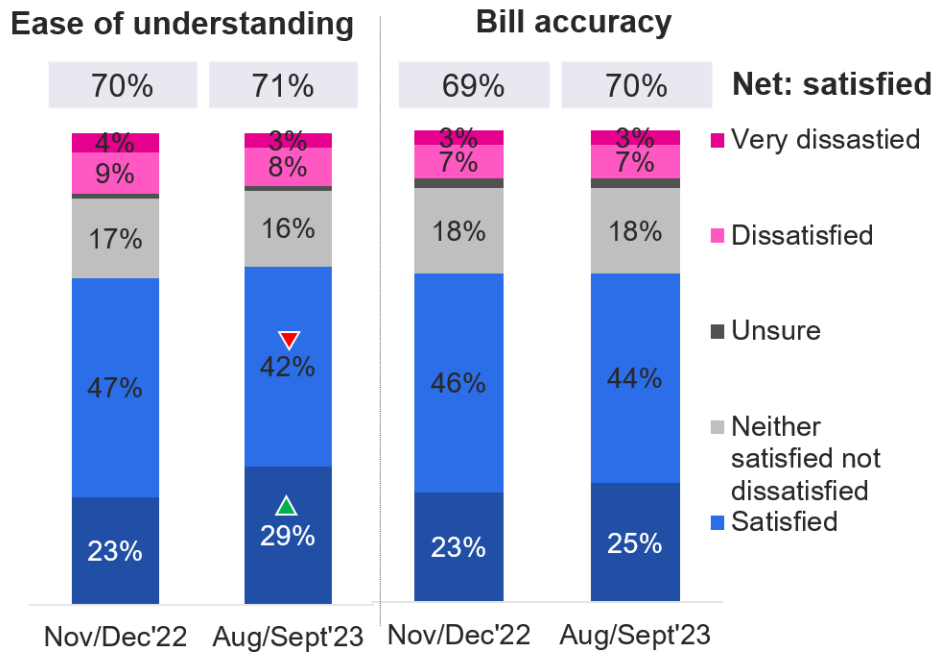
Overview of findings

- **Satisfaction with bill accuracy and ease of understanding is stable:** satisfaction with ease of understanding the bill and bill accuracy has remained stable, with seven in ten satisfied with each dimension (71% and 70%, respectively). Satisfaction for both billing accuracy and ease of understanding is now 6 percentage points below its high point in November/December 2020.
- **Dissatisfaction stemmed from difficulty linking bill figures to actual energy usage:** difficulty understanding how the numbers on the bill relate to energy usage (51% and 37%) and how much energy has been used (42% and 36%) were the top reasons for dissatisfaction with both ease of understanding and bill accuracy.
- **1 in 3 had experienced unexpectedly high bills:** 33% had experienced an unexpectedly high bill in the last 3 months. Several reasons were cited for this, but the top reason was using more energy than they thought (8%), with some also saying they did not know the reason (7%).

Satisfaction with bill accuracy and ease of understanding

Satisfaction with ease of understanding the bill and bill accuracy remained stable, with 71% satisfied with ease of understanding and 70% satisfied with bill accuracy. Stacked bar chart for ease of understanding the bill and billing accuracy. Both show bars for Nov/Dec'22 and Aug/Sept'23.

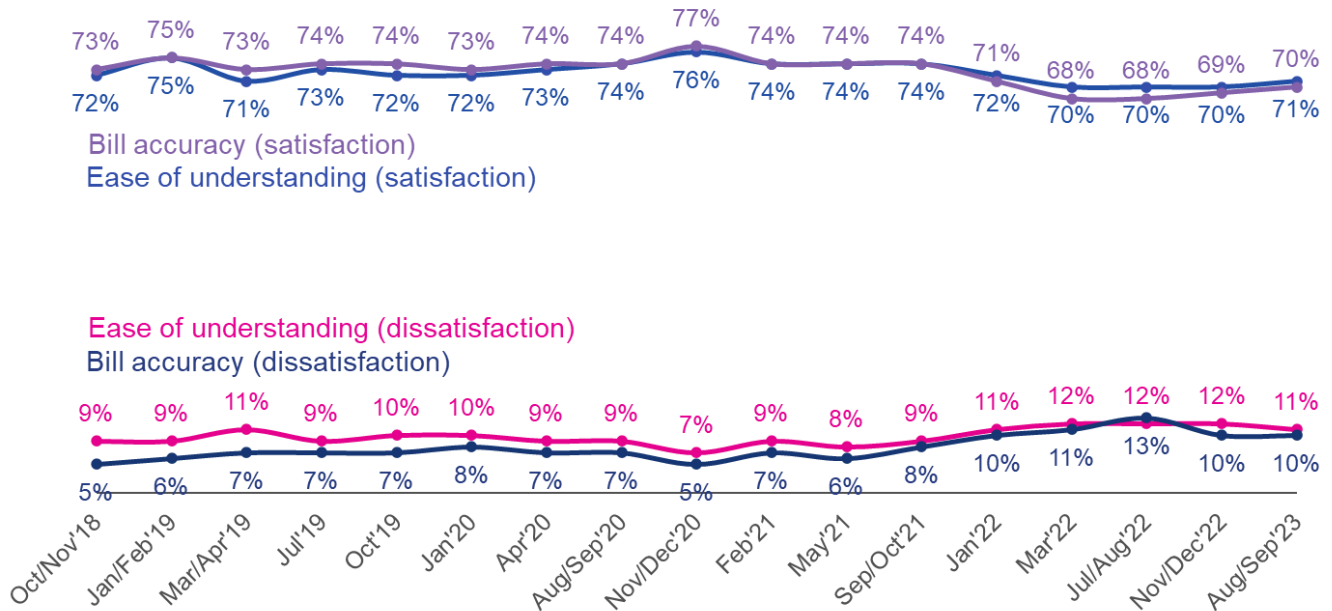
Figure 6: Satisfaction with bill accuracy and ease of understanding



B8. Please can you tell me how dissatisfied or satisfied you are with the following aspects of [supplier] bills.
 Base: pays gas/electricity with direct debit or on receipt of bills, August/September 2023 (2,953)
 Data labels not shown for values below 3%

Both measures now stand 6 percentage points below this tracker’s peak since the survey began in 2018 (77% for bill accuracy and 76% for ease of understanding – both recorded in November/December 2020).

Figure 7: Satisfaction with bill accuracy and ease of understanding over time



B8. Please can you tell me how dissatisfied or satisfied you are with the following aspects of [supplier] bills.
 Base: pays gas/electricity with direct debit or on receipt of bills, August/September 2023 (2,953)

Several characteristics correlate with consumer satisfaction with ease of understanding the bill and the accuracy of bills, including digital inclusion, financial stability, age, and payment methods.

Individuals who were digitally excluded were less satisfied, with 59% satisfied with ease of understanding bills and 60% for accuracy, compared with those who were digitally enabled, who reported satisfaction levels of 73% and 71%, respectively.

As is the case across a number of satisfaction metrics, satisfaction varies by factors related to financial circumstance. For example, consumers who had experienced falling behind or running out of credit due to affordability issues reported lower satisfaction rates, 58% for understanding bills and 60% for their accuracy, which compares to 73% among those who hadn't fallen behind for affordability reasons.

Age also correlates with satisfaction. Younger consumers aged 18 to 34 expressed lower satisfaction with understanding bills at 67%, compared to 73% for consumers aged 65 and over.

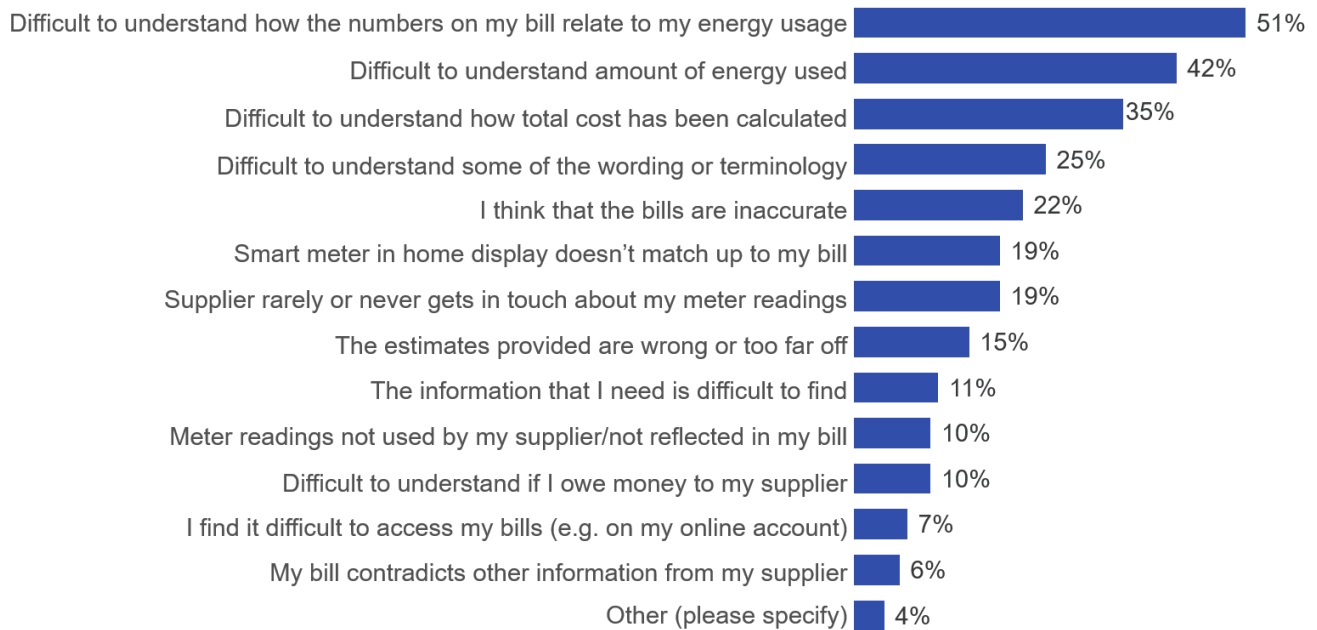
There is also varying satisfaction by payment method, with those paying by standard credit feeling less satisfied (67% for bill understanding and 64% for accuracy) than those opting for direct debit payments (72% and 71%, respectively). No significant changes were seen vs prepayment meter customers. Moreover, the presence of smart meter links to higher satisfaction regarding bill accuracy, with 73% of smart meter owners saying they were satisfied compared to 64% of those without.

Reasons for dissatisfaction with ease of understanding of bills

Half (51%) of those dissatisfied with the ease of understanding the bill said this was because it was difficult to understand how the numbers relate to energy usage. A high share also reported that it was because it was difficult to understand the amount of energy used (42%).

The full range of responses is presented in figure 11.

Figure 8: Reasons for dissatisfaction with ease of understanding of bills



B9. Why are you dissatisfied with the ease of understanding your bill from [supplier]?

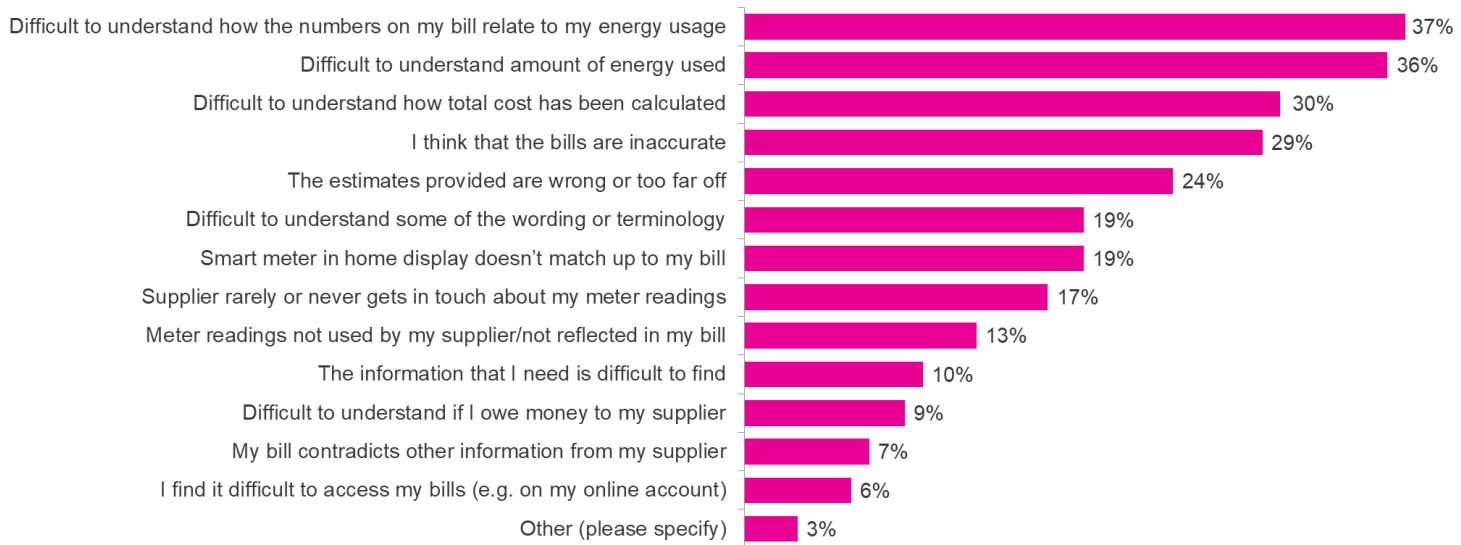
Base: dissatisfied with ease of understanding, August/September 2023 (328)

Reasons for dissatisfaction with bill accuracy

Close to two in five (37%) of those dissatisfied with bill accuracy said it was difficult to understand how the numbers relate to energy usage, and close to as many reported that it was difficult to understand the amount of energy used (36%).

The full range of responses is presented in figure 12.

Figure 9: Reasons for dissatisfaction with accuracy of bills



B9A. Why are you dissatisfied with the accuracy of your bill from [supplier] ?
Base: dissatisfied with accuracy of billing, August/September 2023 (312)

Experience of unexpectedly high bills in the last three months

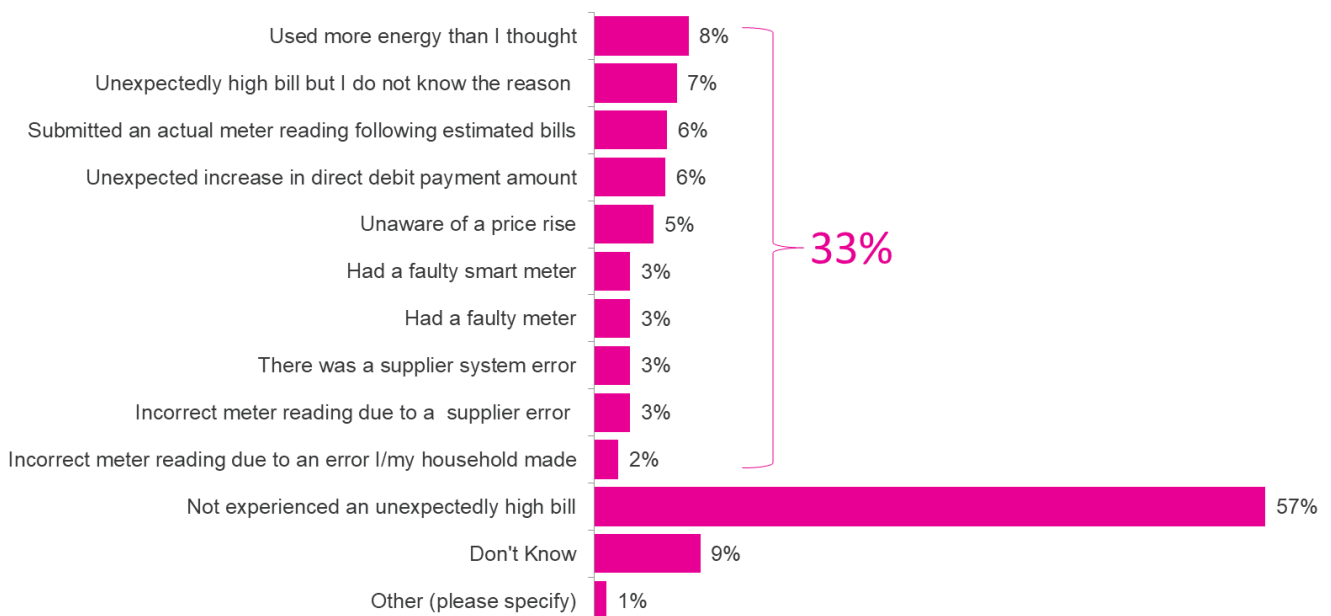
A third (33%) of all respondents reported experiencing an unexpectedly high bill in the last three months, a period that could have covered May to September 2023 depending on when the respondent took the survey.

Unsurprisingly, examining differences by subgroup, the strongest correlation was for variables linked to financial circumstances. For example, those who had fallen behind/run out of credit for affordability reasons were more likely to report they had experienced unexpectedly high bills than those who had not (65% compared to 28%). Likewise, consumers classified as highly vulnerable to the cost of living also disproportionately reported this experience (46% of those classified as highly vulnerable compared to 29% classified as doing well).

Additionally, those paying by standard credit (54% compared to 30% on direct debit) and those who had changed supplier in the last three months (52% compared to 26% who had not) were more likely to claim they have experienced an unexpectedly high bill in the last 3 months.

Looking at the top reasons why consumers had experienced an unexpectedly high bill, close to one in ten (8%) said they had used more energy than they thought, and a similar proportion (7%) said they did not know why it was so high. Meanwhile, one in twenty felt it was because they had submitted an actual reading following a period of estimates (6%), while others said they had an unexpected increase in their direct debit payment amount (6%) or were unaware of a price rise (5%).

Figure 10: Reasons for unexpectedly high bills in the last three months



B11. In the last 3 months, have you experienced an unexpectedly high bill due to any of the following reasons?
 Base: all respondents, August/September 2023 (3,742)

Contacting suppliers

Overview of findings

- **Consistent contact rates:** almost one in three (32%) had contacted their supplier in the last 3 months, in line with November/December 2022. For those getting in contact, the most common query type was to give a meter reading (22%), a smart meter query (19%), and to query bills received (19%).
- **Less difficult to contact supplier and fewer unsuccessful contact attempts:** fewer this wave found it difficult to contact their supplier, a decrease since November/December 2022 (26% compared to 23%). Encouragingly, there has also been a decline in the share that said they had tried to contact their supplier but were unable to (6% compared to 8% in November/December 2022). That said, it's worth noting other confounding factors that may have impacted improved contact ease such as seasonal differences between November/December 2022 and August/September 2023.
- **Chosen contact methods appear to align with customer preferences:** in line with November/December 2022, over half contacted via phone (53%) on the last occasion they got in touch with their supplier. Email (23%) and apps (17%) were the next most popular contact methods, also consistent with November/December 2022. Encouragingly, there appears to be good alignment with how customers last contacted their supplier and their preference for contact, with the most common channels used being generally the most preferred.
- **Satisfaction with elements of contact is increasing, but many are still experiencing issues:** satisfaction with various elements of the contact – such as the service received through the app, the service received on social media, and the time it took to resolve a query – had all increased relative to November/December 2022. When prompted on particular issues experienced, six in ten (63%) of all those that got in contact reported experiencing at least one difficulty on the most recent occasion they got in touch with their supplier, with long wait times being the biggest single issue.
- **One in seven queries were unresolved:** around one in seven (15%) who had made contact said their query was not resolved, with a further quarter saying their query was partially resolved (24%), and just over half (54%) saying the query was fully resolved. Queries about smart meters and a previous complaint were the most likely to be reported as being unresolved (both 22%).

Contact with suppliers

As was the case in November/December 2022, around one in three (32%) reported contacting their supplier in the last three months. A further 6% said they had tried to contact their supplier but had been unable to get through, a decline on the 8% who had done so in November/December 2022.

Those that were in more vulnerable circumstances, for example, those that had fallen behind/ran out of credit for affordability issues⁹ (70%), those on the PSR (53%) or those classed as highly financially vulnerable (42%), were more likely to report that they contacted or tried to contact their supplier.

⁹ Fallen behind/ran out of credit for affordability reasons means they have fallen behind/ran out of credit due to the cost of living, not being able to afford the cost of energy or that their direct debit wasn't sufficient to cover their energy usage, and they now cannot afford to pay the new amount

Consumers with a long-term illness, physical or mental health problem or disability (45%) were also more likely to have contacted or tried to contact their supplier.

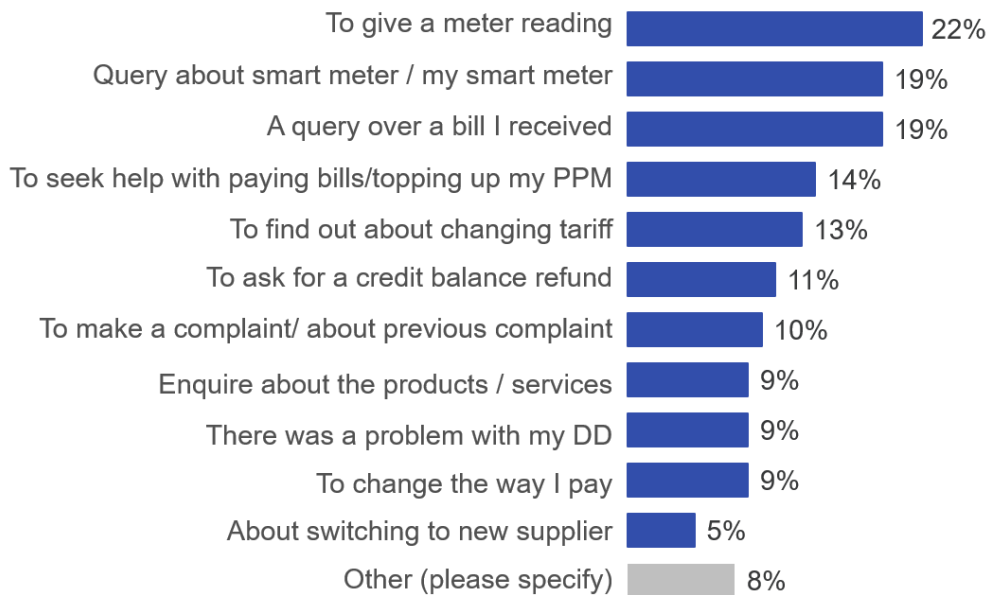
The following groups were more likely to report having tried but been unable to contact their supplier:

- fallen behind/ run out of credit for affordability issues (15%)
- aged 18-34 (11%)
- classified as highly vulnerable to the cost of living (9%)
- renters (7%)

Reasons for contact with suppliers

The main reasons for contacting their supplier were to give a meter reading (22%), followed by a query about a smart meter (19%) and to query a bill (19%).

Figure 11: Reasons for contacting supplier

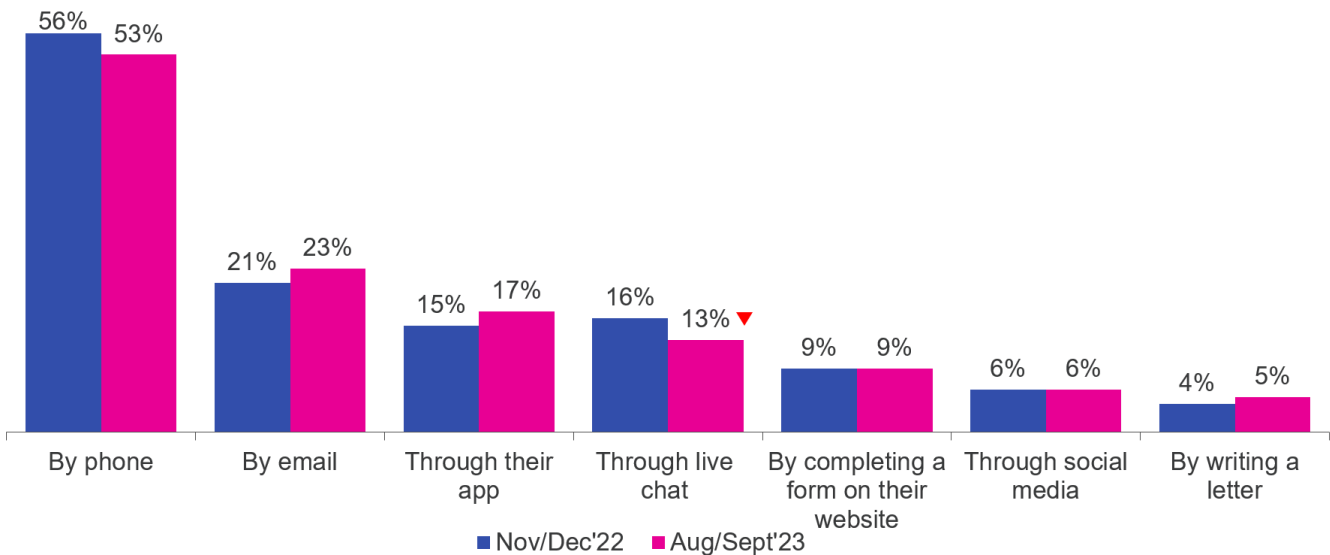


*E4. Thinking of the last time you made contact with [supplier], what was it about?
 Base: all who contacted or tried to contact, August/September 2023 (1,426)*

Method of contact with suppliers

Similar to November/December 2022, over half (53%) of those who said they had contacted their supplier recently said they had done so by telephone, while a quarter (23%) by email and 17% did so via their app. 13% said they used live chat, a decline on the 16% who did so in November/December 2022.

Figure 12: Method of contact with suppliers



E6. How did you make contact with [supplier] on that last occasion?
 Base: all who contacted or tried to contact, August/September 2023 (1,426)

The preferred method of contact follows the pattern of the last contact method, with phone being the most popular, followed by email and then the app.

Black respondents (65%), older respondents (60%), women (57%), and those in socioeconomic group C2DE (56%) were more likely to prefer the phone. Men and those aged 18 to 34 were more likely to say they use online methods. Those aged 18 to 34 (11%) were more likely to prefer using social media.

Queries over a bill were more likely than average to be dealt with over the phone (24%), whereas smart meter queries were more likely to be dealt with over live chat (28%).

Help with paying bills was more likely than average to be sought via social media (27%) and email (19%).

Enquiries about products and services were more likely than average to be made via social media (21%), website forms (18%) and apps (15%).

Figure 13: Reason for contacting supplier by method of contact

	Total	Phone	Live chat	Email	Letter	Social Media	Form on website	App
To give a meter reading	22%	19% ▼	23%	27% ▲	29%	33% ▲	37% ▲	23%
Query about smart meters / my smart meter	19%	20%	28% ▲	20%	22%	21%	25%	19%
A query over a bill I received	19%	24% ▲	20%	20%	16%	25%	14%	15%
To seek help with paying my energy bills/topping up my prepayment meter	14%	15%	17%	19% ▲	19%	27% ▲	16%	15%
To find out about changing my tariff	13%	14%	9%	13%	19%	19%	19%	16%
To ask for a credit balance refund	11%	10%	18% ▲	14%	17%	22% ▲	15%	15%
To make a complaint or about a previous complaint	10%	12% ▲	17% ▲	15% ▲	26% ▲	26% ▲	16%	10%
Enquire about the products/ services they offer	9%	9%	13%	11%	15%	21% ▲	18% ▲	15% ▲
There was a problem with my direct debit	9%	10%	16% ▲	13% ▲	20% ▲	16%	18% ▲	9%
To change the way I pay for my energy	9%	9%	17% ▲	9%	28% ▲	28% ▲	12%	14% ▲
About switching to a new supplier	5%	4%	8%	9% ▲	26% ▲	14% ▲	10%	11% ▲
Other reason (please specify)	8%	8%	3% ▼	5% ▼	1% ▼	4%	3% ▼	8%
Net: Payment query:	51%	55% ▲	63% ▲	55%	65% ▲	71% ▲	51%	52%

E4. Thinking of the last time you made contact with [supplier], what was it about?

Base: all who contacted or tried to contact, August/September 2023 (1,426)

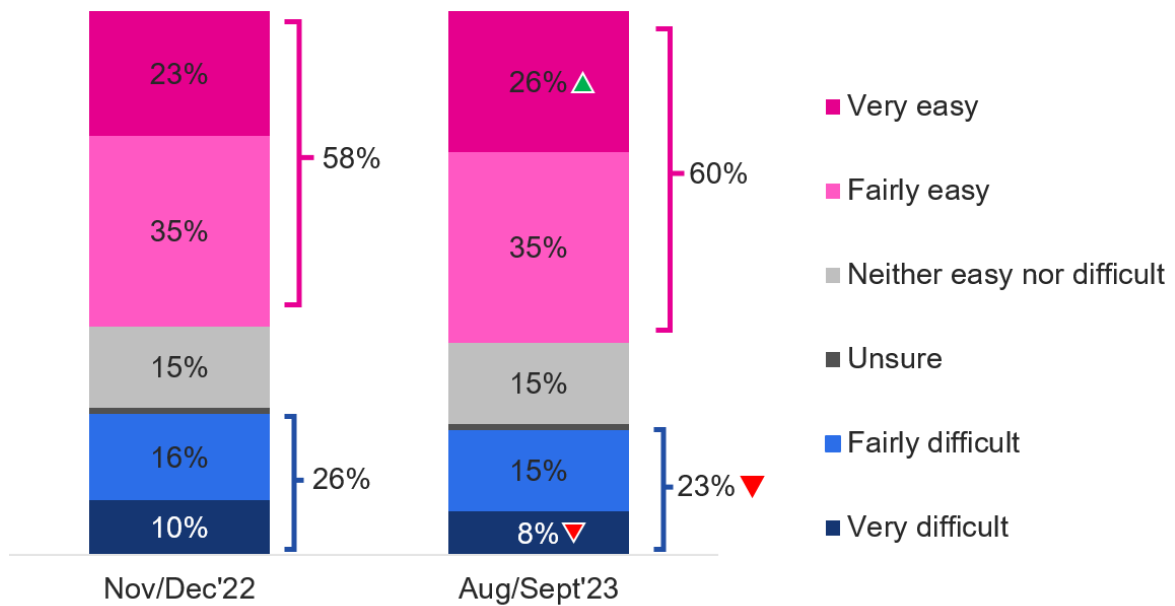
Ease of contacting suppliers

Compared to November/December 2022, there has been a small improvement in customers' experiences of contacting their supplier. The percentage of those who found contacting their supplier difficult decreased from 26% to 23%. Meanwhile, the overall ease of contact remained stable, with the proportion of individuals who found it 'very easy' increasing from 23% to 26%.

That said, it's worth noting other confounding factors that may have impacted improved contact ease such as seasonal differences between November/December 2022 and August/September 2023, with usage and affordability challenges likely to be more apparent in winter months leading to increased numbers of consumers trying to contact their suppliers. Some suppliers may have also started implementing contact ease policies in anticipation of incoming changes¹⁰.

¹⁰ Ofgem recently published our decision on new and updated rules to make it easier for consumers to contact their supplier, to help provide support for domestic customers who are struggling with their energy bills and to compel suppliers to publish information on their customer service performance, as measured by Citizens Advice.

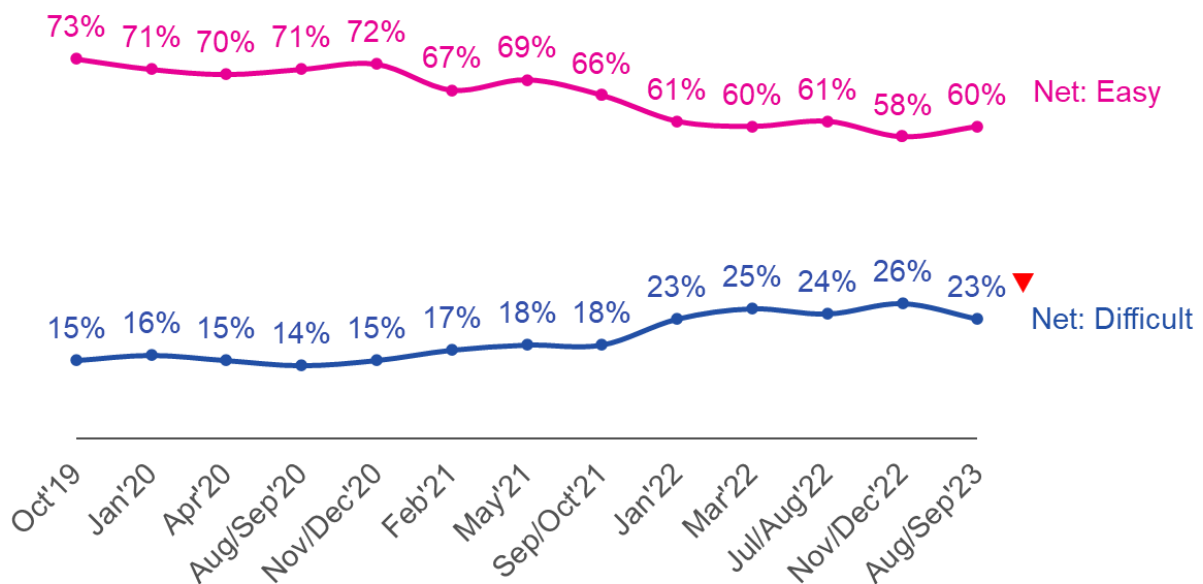
Figure 14: Ease of contacting suppliers



E2. Thinking about the last time you tried to contact [supplier], how easy or difficult did you find it to contact them?
 Base: all those excluding those who have not tried to contact supplier, August/September 2023 (3,135)
 Data labels not shown for values below 3%

Considering this over the longer term, while this represents a decrease on the 26% who found it difficult in November/December 2022, it remains high relative to results from 2020/21.

Figure 15: Ease of contacting suppliers over time



E2: Thinking about the last time you tried to contact [supplier], how easy or difficult did you find it to contact them?
 Base: all those excluding those who have not tried to contact supplier, August/September 2023 (3,135)

Those with large suppliers found it more difficult to contact than those with small suppliers (24% compared to 16%). Similarly, consumers who contacted via live chat or by phone found it more difficult to contact (38% and 32% difficult), while those who contacted via the app found it easier (68% easy).

After a long-term decline, ease of contact increased among those that had contacted/tried to contact via phone (56%), email (65%) and app (68%), and remained stable for live chat (56%).

Figure 16: Ease of contacting suppliers by contact method

	Phone	Phone	Email	Email	App	App	Live Chat	Live Chat
	Easy	Difficult	Easy	Difficult	Easy	Difficult	Easy	Difficult
Oct'19	64%	26%	69%	19%	-	-	68%	24%
Jan'20	62%	26%	70%	23%	-	-	64%	25%
Apr'20	63%	25%	68%	21%	-	-	65%	22%
Aug/Sep'20	63%	25%	67%	24%	69%	18%	63%	26%
Nov/Dec'20	59%	29%	66%	23%	66%	24%	61%	28%
Feb'21	57%	31%	59%	30%	63%	23%	62%	31%
May'21	56%	32%	64%	25%	64%	29%	64%	26%
Sep/Oct'21	58%	32%	63%	27%	68%	23%	61%	24%
Jan'22	51%	39%	60%	28%	56%	29%	43%	46%
Mar'22	48%	41%	57%	30%	62%	23%	43%	44%
Jul/Aug'22	52%	39%	60%	31%	58%	33%	50%	39%
Nov/Dec'22	45%	42%	52%	36%	56%	35%	54%	36%
Aug/Sep'23	56% ▲	32% ▼	65% ▲	22% ▼	68% ▲	22% ▼	56%	38%

Base: all who contacted or tried to contact, August/September 2023 (1,426)

E2. Thinking about the last time you tried to contact [supplier], how easy or difficult did you find it to contact them?

Base: all those excluding those who have not tried to contact supplier, August/September 2023 (3,135)

Neither easy/difficult, unsure and prefer not to say are not shown. Consumers could select multiple channels.

Significance only marked for current wave vs previous wave.

Satisfaction with elements of last contact

The overall enhancement in customer contact experience coincided with improvements in more specific elements of the interaction. Consumer satisfaction with services received through online methods was typically higher compared to November/December 2022.

For example, there was a 13-point rise in consumers who said they were satisfied with the service received through their app, a 17-point rise in satisfaction with the service received through social media, and a 12-point rise in the service received via email.

Other elements that improved were the ease of finding contact details (+7 points), ease of making contact with them (+7 points) and how the overall interaction was handled (+5 points).

However, services received through the phone, on a form on the supplier’s website and through live chat did not see a significant increase in satisfaction relative to November/December 2022.

Figure 17: Satisfaction with elements of last contact

			% point difference from Nov/Dec'22
The service received through their app	73%	+13%	▲
The service received through social media	73%	+17%	▲
The service received by completing a form on their website	72%	+7%	
Ease of finding the right contact details	66%	+7%	▲
The service received by email	65%	+12%	▲
How the overall interaction was handled	65%	+5%	▲
How well your supplier understood what you needed	64%	N/A	
Ease of making contact with them	64%	+7%	▲
The time it took for your supplier to respond to your query	63%	+6%	▲
The service received by phone	62%	+5%	
The service received through live chat	62%	+5%	
The level of empathy or concern showed towards you	60%	+5%	▲
The time it took to get through to someone who could resolve your query	54%	+11%	▲

Source: E7. Still thinking about this last contact, please can you tell me how dissatisfied or satisfied you were with the following.

Base: floating bases, all who contacted or tried to contact via a particular method where relevant, August/September 2023

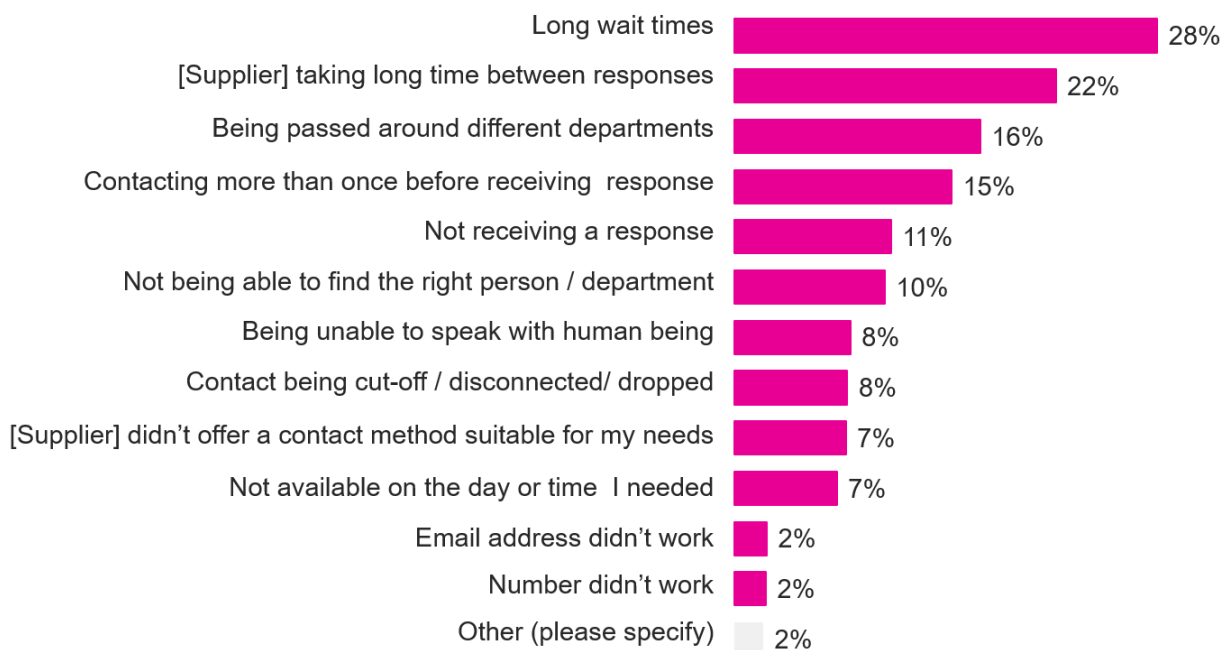
Experience of difficulties

When prompted from a list of issues experienced, over six in ten (63%) reported experiencing difficulties with their most recent contact.

The most commonly reported experiences were long wait times (28%), suppliers taking a long time between responses (22%), being passed around different departments (16%) and having to make repeated contacts (15%).

Overall, 43% selected one or more options linked to difficulty reaching somebody, and a similar proportion (41%) selected one or more options linked to experiencing long wait times.

Figure 18: Difficulties experienced with contact



E12: On the most recent occasion you got in touch with [supplier], did you experience any of the following difficulties?

Base: all who contacted or tried to contact, August/September 2023 (1,426)

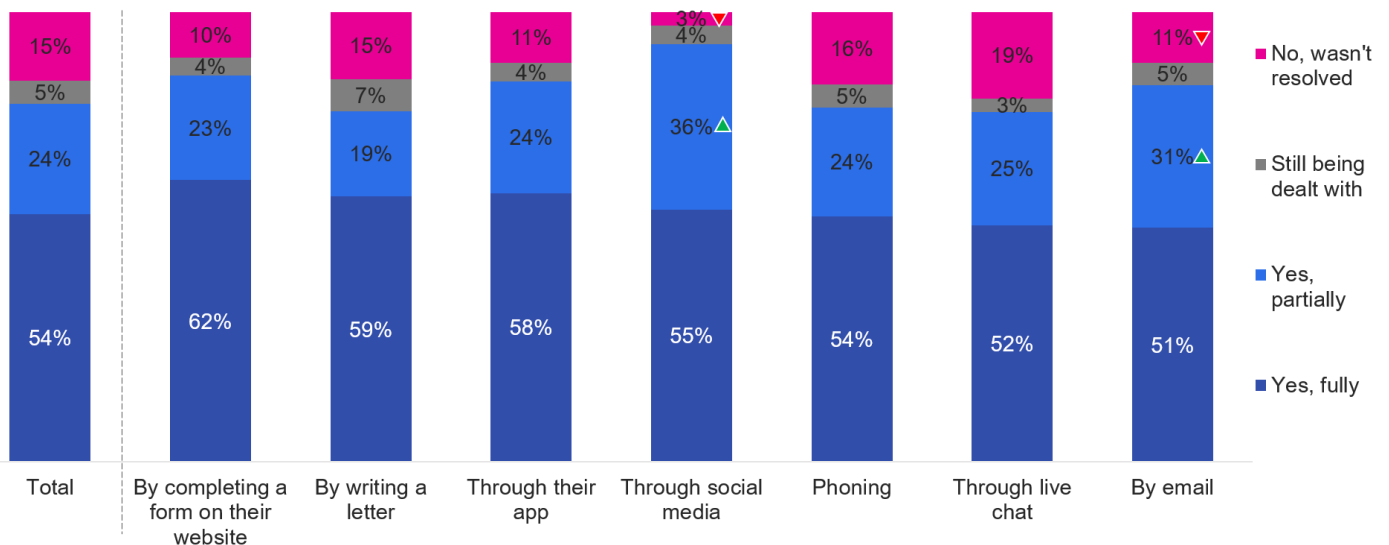
Consumers who contacted their supplier via telephone (53%), live chat (52%) and social media (64%) were most likely to report the process took a long time. Consumers contacting through live chat (62%), writing a letter (86%) and social media (72%) were most likely to find it hard to reach somebody.

Issue resolution

Around one in seven (15%) who made contact said their query was not resolved, while one in twenty (5%) said it was still being dealt with, a quarter (24%) said that it was partially resolved, and the remaining 54% said it was fully resolved.

Contact via social media was reported to be the most likely to lead to a resolution, with only 3% contacting via this method reporting their issue was not resolved. Social media was more likely to be used for payment queries (71%) or about a complaint (26%). While it is encouraging to see customers using social media having generally positive experiences, this raises concerns around accessibility, as digitally excluded customers are likely unable to use this route for resolution.

Figure 19: Issue resolution by method of contact

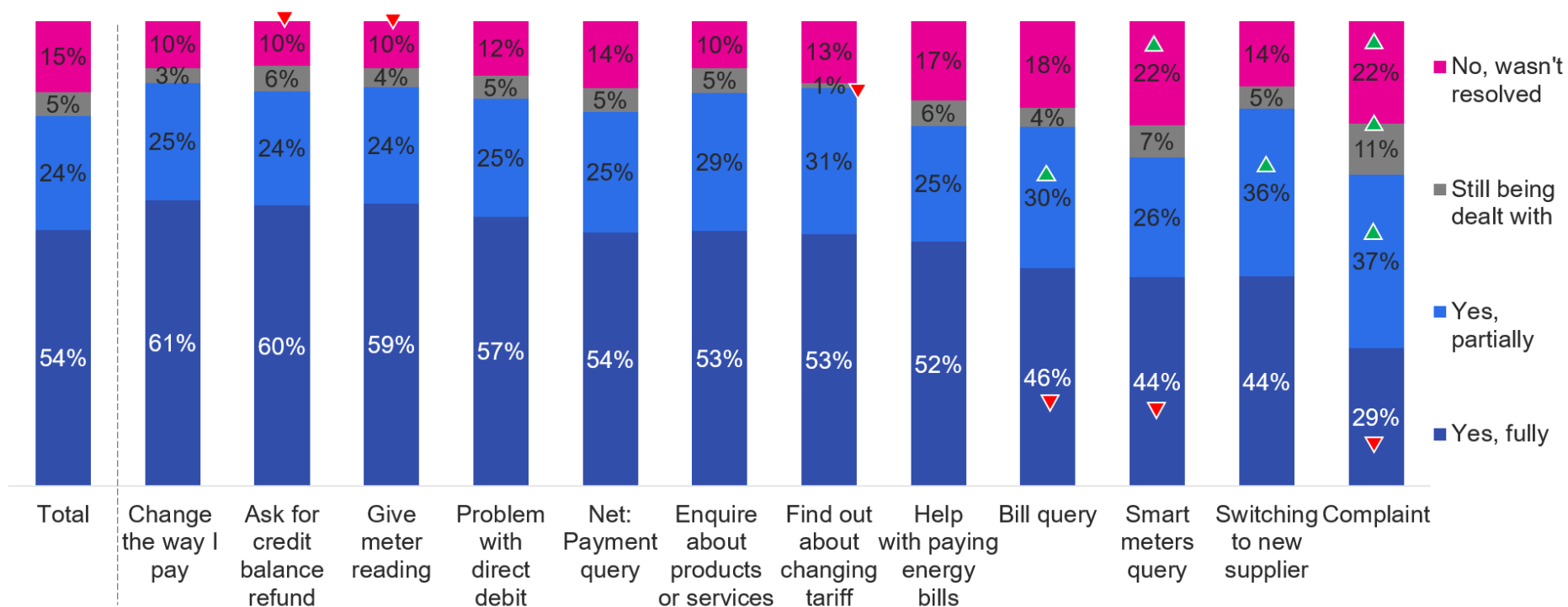


E14. Would you say your query, issue or question was answered or resolved?

Base: all who contacted or tried to contact, August/September 2023 (1,426)

Queries regarding smart meters and complaints were the least likely to be reported as resolved, with 22% in both cases remaining unresolved (see figure 26 overleaf). That said, some queries may have still been in process at the time of the survey.

Figure 20: Issue resolution by reason for contact



E14. Would you say your query, issue or question was answered or resolved?

Base: all who contacted or tried to contact, August/September 2023 (1,426)

Complaints

Overview of findings

- **1 in 10 contacts were to make a complaint:** in line with November/December 2022, 10% of contacts made were about a complaint, equivalent to 4% of all respondents. The most common reasons for complaint were problems with bills (32%), followed by a problem with a smart meter (27%) and the pricing/cost of energy (26%).
- **High outcome satisfaction but lower satisfaction for handling and process length:** satisfaction was high for the outcome of the complaint (71%) but lower for the handling of the complaint (41%) and the length of the process (39%). However, while still low, satisfaction with the overall handling of the complaint has improved (+12 percentage points compared to November/December 2022).

Reasons for complaints

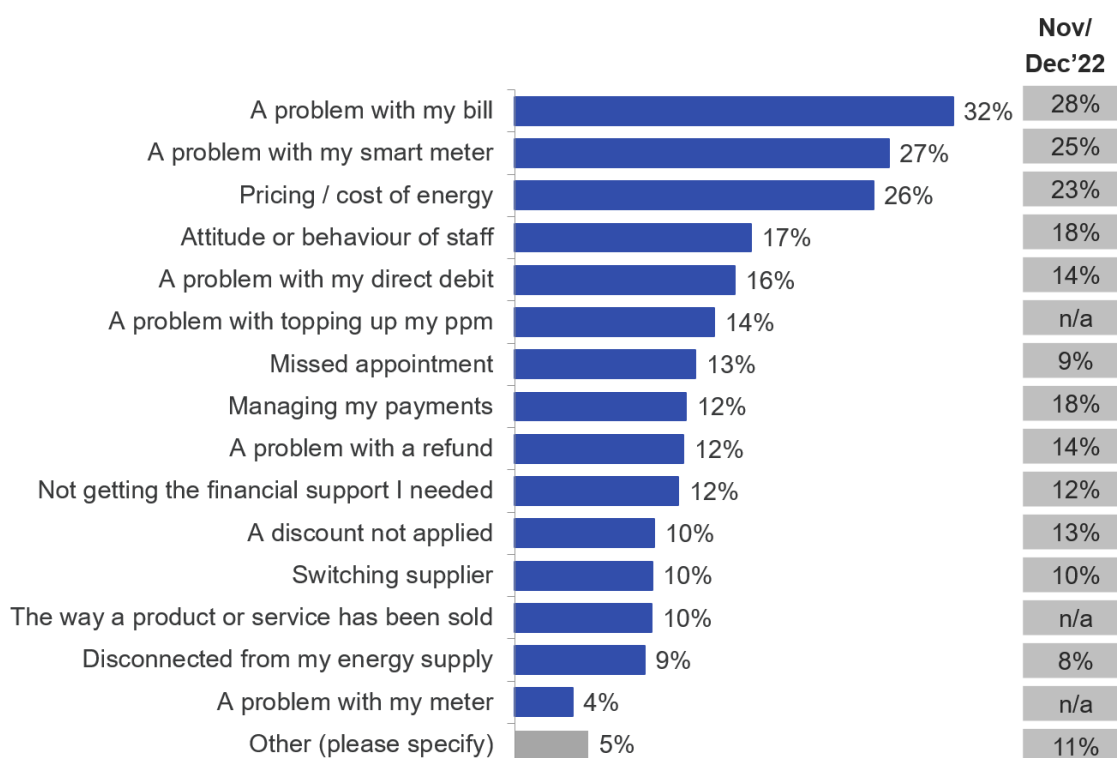
One in ten (10%) of those who had been in contact with their supplier were making a complaint, which equates to 4% of all respondents, in line with November/December 2022. This is slightly higher than data provided by suppliers for Q3 2023 (roughly 2% of GB energy consumers made a complaint)¹¹.

A third (32%) of complaints regarded problems with bills, followed by problems with smart meters (27%) and energy costs (26%).

Around one in six of complaints were about the attitude or behaviour of staff (17%), about problems with direct debits (16%) or about problems topping up prepayment meters (14%).

There were no significant differences across reasons for complaints compared to November/December 2022.

Figure 21: Reasons for complaints



E8. Earlier you said your last contact with [supplier] was about a complaint. What was the complaint about?
 Base: all contacted to make a complaint, August/September (149)

Three in ten (29%) of those who contacted their supplier to make a complaint reported they were still dealing with the complaint themselves. A quarter (26%) had reached the end of the process, 15% had given up, 13% were still dealing with the complaint and had received advice, and 9% said they had escalated the complaint.

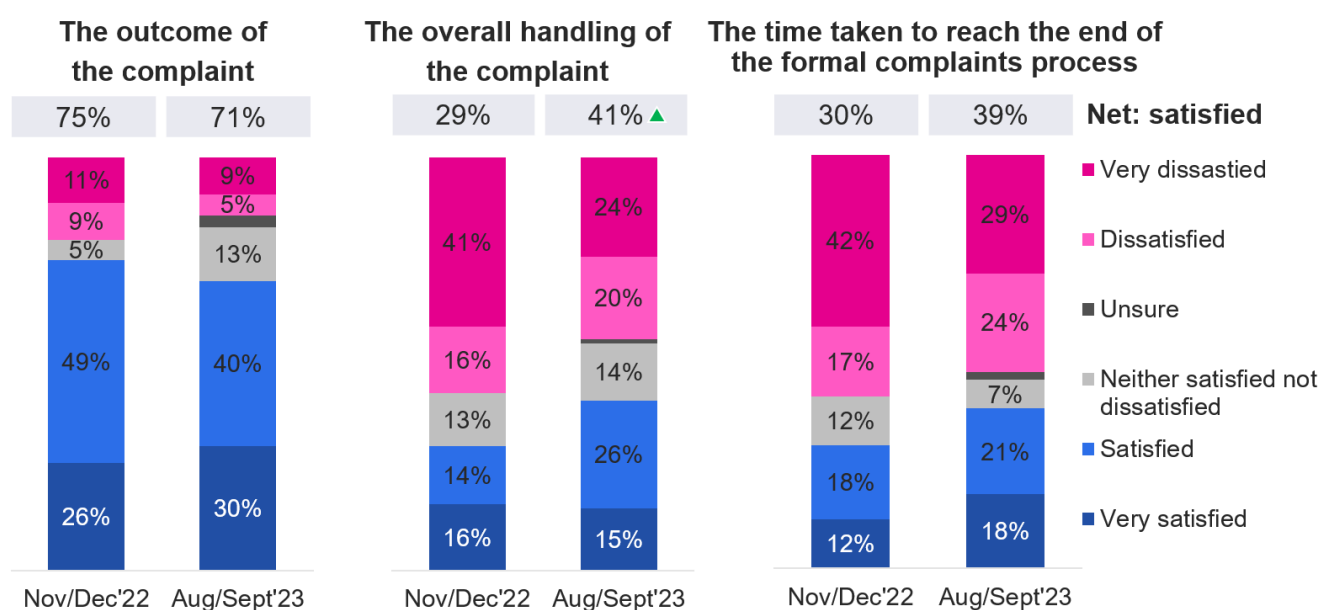
¹¹ See Ofgem’s data portal: [Customer service data | Ofgem](#)

Satisfaction with elements of complaints handling

Satisfaction was high for the outcome of the complaint, with 71% of those who had contacted their supplier to make a complaint satisfied, in line with November/December 2022. However, despite improvements since November/December 2022, where 29% were satisfied with the overall handling of the complaint, satisfaction remained low on this dimension at 41%.

At 39%, satisfaction levels were also low in relation to the time taken to reach the end of the formal complaints process. This is not a statistically significant difference from November/December 2022 (30%), given the lower sample size for this question.

Figure 22: Satisfaction with elements of complaints handling

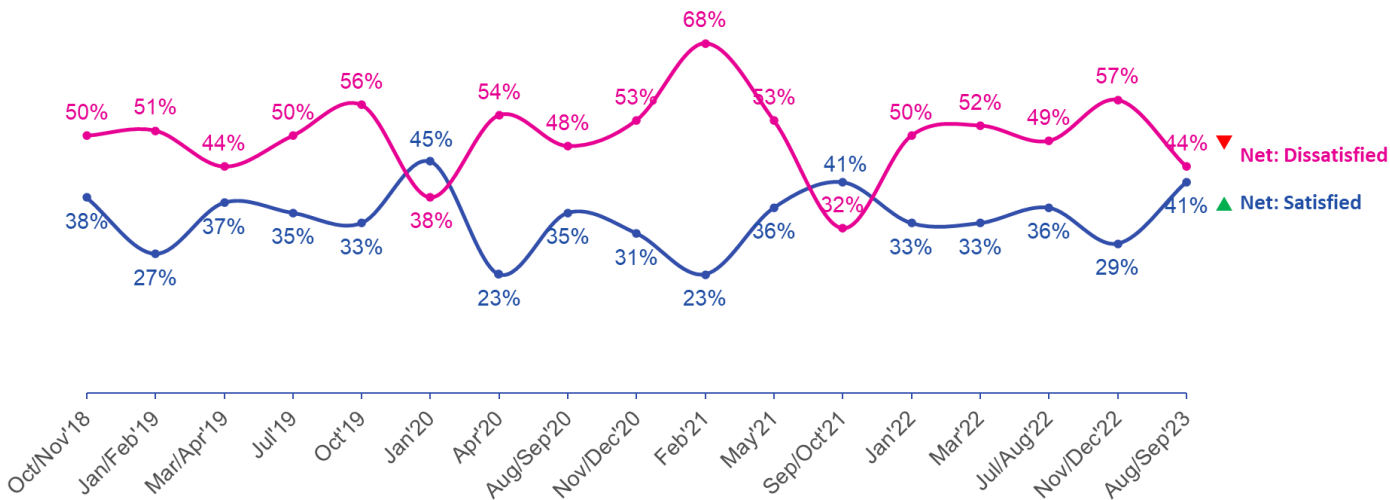


E10. Please can you tell me how satisfied or dissatisfied you are with the following aspects of your complaint.
 Base: August/September 2023, contacted to make a complaint (149)/ reached end of complaints process (37)
 Data labels not shown for values below 3%

Satisfaction with the overall handling of the complaint increased compared to November/December 2022, from 29% to 41%. This places satisfaction at nearly the highest level since this tracker began in 2018.

However, levels of dissatisfaction remain higher than levels of satisfaction (44% compared to 41%), although the gap between the two is amongst the lowest levels seen to date. Note that data can be a little volatile due to low base sizes for this question, so changes across waves should be treated with some caution.

Figure 23: Satisfaction with overall handling of complaints



E10. Please can you tell me how satisfied or dissatisfied you are with the following aspects of your complaint.
 Base: contacted to make a complaint, August/September 2023 (149)

Information Provided by Suppliers

Overview of findings

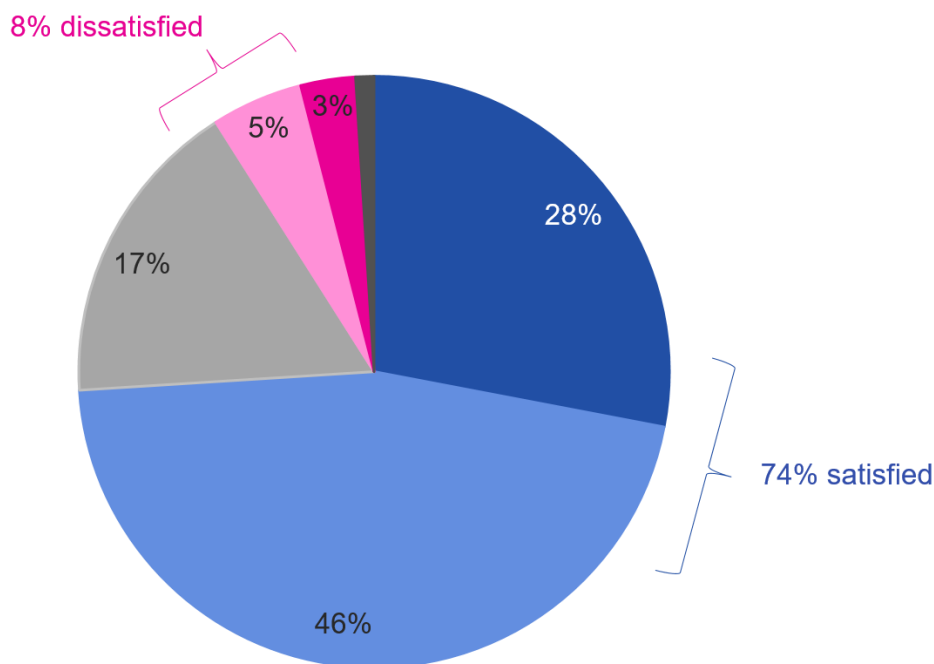
- **High levels of satisfaction with information provided:** most were satisfied with the information¹² they had received from their supplier in the last 6 months (74%), with 8% dissatisfied.
- **Information seen as useful:** across almost all types of information provided, the majority tended to say the information received was useful (usually at least eight in ten for different types of information).

¹² This includes any information, such as written information on bills or information provided over the phone

Satisfaction with supplier information

Three quarters (74%) were satisfied with the information they had received from their supplier in the last six months, while almost one in ten (8%) were dissatisfied. The base for this question has been changed to only include those who say they received information, so data has not been tracked against previous waves.

Figure 24: Satisfaction with information received from supplier



■ Very satisfied ■ Satisfied ■ Neither ■ Dissatisfied ■ Very dissatisfied ■ Unsure

D1. Overall, how satisfied or dissatisfied are you with the information you have received from [supplier] in the last six months?

Base: received information, August/September 2023 (2,387)

Those more likely to say they were dissatisfied with the information received were:

- those classified as highly financially vulnerable (13%)
- those aged 18-24 (14%)
- digitally excluded respondents (17%)
- those that have changed their payment type (12%)

Recall and usefulness of information received from supplier

Three quarters (74%) were satisfied with the information they had received from their supplier in the last six months, while one in ten (8%) were dissatisfied. The base for this question has been changed to only include those who say they received information, so data has not been tracked against previous waves.

Figure 25: Recall and usefulness of information received from supplier

Information recalled and how useful it was	% who recall receiving	% who found useful
Notification of a price increase	58%	83%
A free contact number, if concerned about bills	48%	81%
Info about energy efficiency schemes, tips to be more energy efficient	48%	83%
What to do if need assistance with paying energy bills	47%	81%
About whether payment type and tariff best suits my needs	42%	87%
What to do in an emergency (e.g. a gas leak or faulty meter)	42%	89%
Other tariffs available	42%	82%
Running out of credit / being disconnected from supply	41%	85%
Guidance about receiving info in a suitable format that meets my needs	38%	82%
How to make a complaint	37%	81%
What to do in the event of a power cut / disruption to supply	35%	88%
What information you need to compare energy prices	33%	84%
How to access advice from independent organisations about energy issues	33%	79%
What to do if can't resolve your complaint / how to escalate	30%	83%
The complaints process	30%	84%
Whether you could be eligible for the Priority Services Register	29%	86%
What benefits there are to being on the Priority Services Register	28%	85%
Net - information about complaints	54%	78%
Net - falling behind/running out of credit	49%	82%
Net - PSR information	36%	87%

D2: Do you recall if [supplier] has given you information about any of the following in the last six months?

Base: all respondents, August/September 2023 (3,742)

D3: How useful was the information you received for each of the following...

Base: received information, August/September 2023 (mixed base sizes)

What are the experiences of customers struggling financially?

Overview of findings

- **Payment method disparity in bill struggles:** an average of 12% of consumers had fallen behind on their bills or had run out of credit in the last three months for affordability reasons, but this hides the disparity across payment methods. One in five (21%) prepayment and over a quarter (27%) of standard credit customers had fallen behind on their bills or had run out of credit compared to just 9% of direct debit customers.
- **Over a third (35%) did not get any support from their supplier:** among those falling behind or running out of credit for affordability reasons, less than one in five (17%) said their supplier contacted them to offer support once they had fallen behind/run out of credit. Close to half (48%) said they had contacted their supplier. So, in total, two thirds (65%) had been in contact with their supplier and 35% had contact about support with their supplier.
- **Most were offered support from their supplier once they had been in contact:** four in five (82%) who had contacted or were contacted by their supplier had been offered some form of support. Non-financial support was more common than financial support – e.g. 30% said they were offered information about organisations that provide support, and 27% were asked questions to understand their situation.
- **And most were satisfied with the support they had received:** among those who had contact about paying their bills and running out of credit on their prepayment meter, two-thirds were satisfied with the support they had received with paying their bills, in line with November/December 2022 (63% compared to 58%).
- **Of those that ran out of credit on their prepayment meter, one in five were disconnected for 12 hours or more:** among the prepayment meter customers that had run out of credit in the last three months, most said they were disconnected for 3 hours or less (69%), but one in five (19%) said they were out of credit for 12 hours or more.

Falling behind or running out of credit

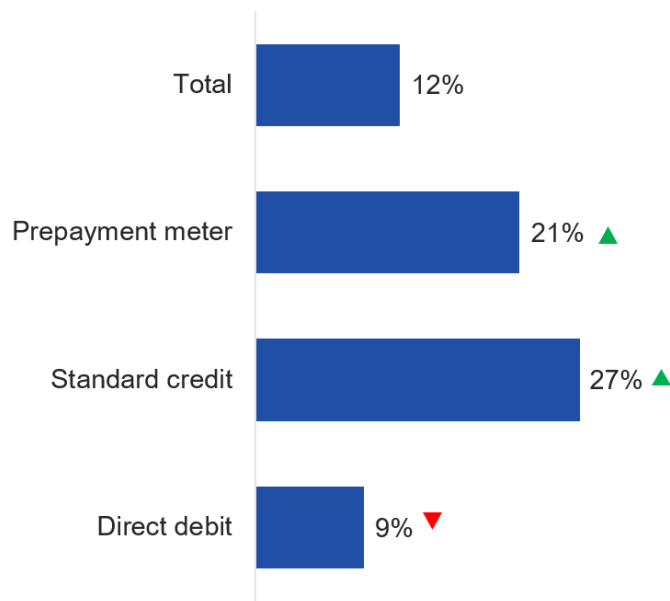
Overall, one in ten (12%) of all respondents reported either falling behind on direct debit or standard credit or running out of credit on prepayment meters for affordability reasons.

Unsurprisingly, consumers who have fallen behind or ran out of credit for affordability reasons were more likely to be less financially secure or vulnerable. For example, 26% classified as highly financially vulnerable, and 24% of consumers in receipt of benefits. Those on prepayment meters (21%) and standard credit (27%) were also more likely to report this to be the case than direct debit customers (9%).

Other groups more likely to have fallen behind or run out of credit for affordability reasons included consumers with a long-term illness, physical or mental health problem or disability (21%), digitally excluded consumers (15%), younger consumers aged 18-34 (26%), consumers living in London (20%) and renters (19%).

These findings indicate that support measures currently offered by suppliers may not adequately address the needs of financially vulnerable individuals. It raises important questions about the effectiveness of existing support mechanisms.

Figure 26: Fallen behind on direct debit or standard credit or run out of credit on prepayment meter for affordability reasons



G1: Thinking about the past 3 months, has your household fallen behind on an energy bill so that you owed money to your energy supplier?

Base: August/September 2023, direct debit (2,777), standard credit (446)

G2: Thinking about the past 3 months, has your household run out of credit on your prepayment meter so that you have been temporarily disconnected from your energy supply?

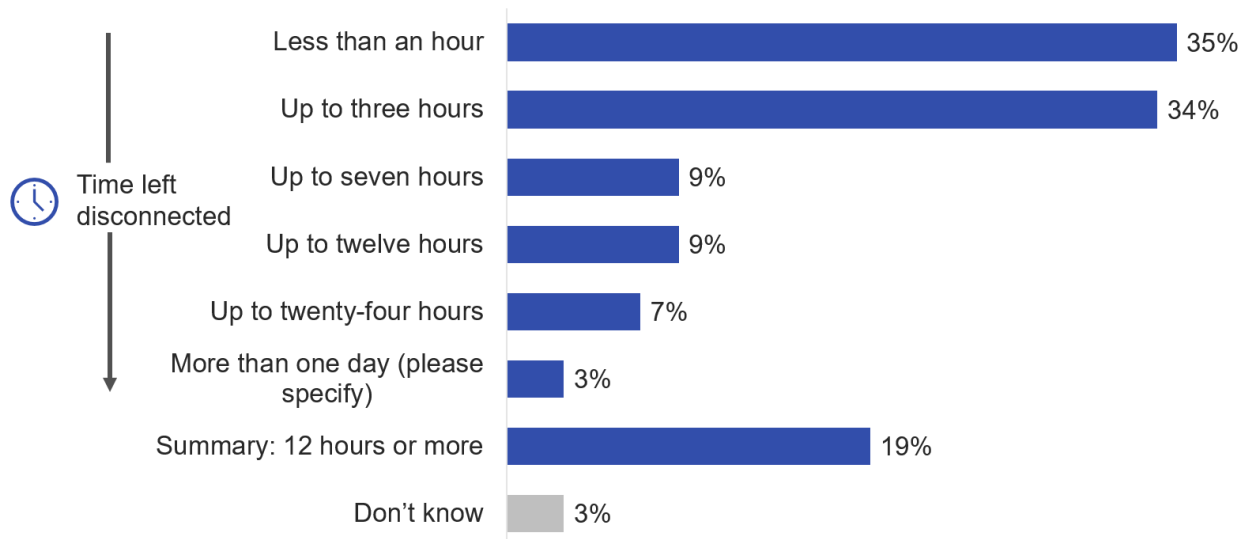
Base: August/September 2023, prepayment meter (462)

G5: Thinking about the most recent time you were disconnected from your energy supply, did any of the below factors contribute to you being disconnected? Did any of the below factors contribute to you falling behind on your energy bills?

Base: agreed to answer question and prepayment meter has run out of credit (253) or fallen behind on bills (497)

Prepayment customers who had run out of credit for affordability reasons were asked how long they were disconnected from their energy supply. The majority (69%) reported having been disconnected for up to three hours, but one in five (19%) reported having been disconnected for 12 hours or more.

Figure 27: Duration of disconnection



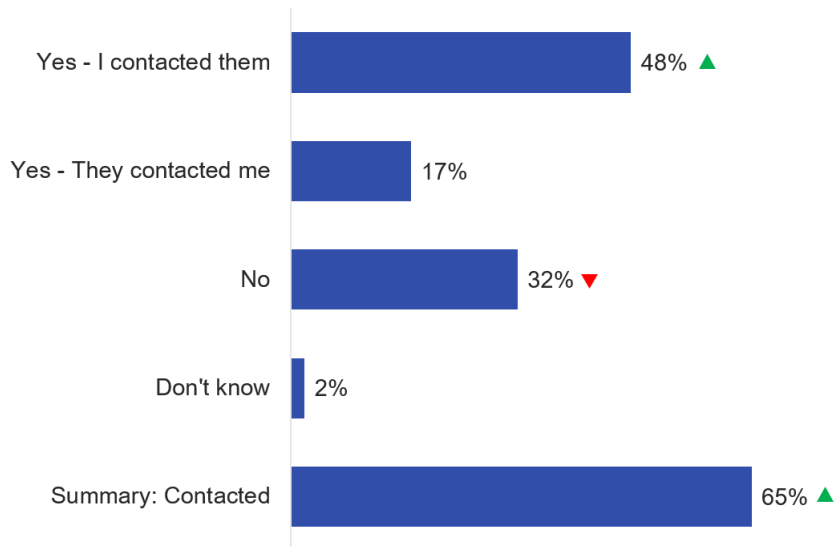
G3. Please could you say how long you were disconnected from your energy supply for?

Base: prepayment meter ran out of credit for affordability reasons, August/September 2023 (156)

Contact with supplier

Two in three (65%) respondents reported being in contact with their supplier about help with paying their bills. 48% reported that they made contact with their supplier first, while 17% said their supplier proactively reached out to them. Worryingly, of those who fell behind on bills or ran out of credit for affordability reasons in the past 3 months, almost one in three (32%) did not have any contact with their supplier about this.

Figure 28: Contact with supplier about help with paying bills among those who have run out of credit/fallen behind for affordability reasons



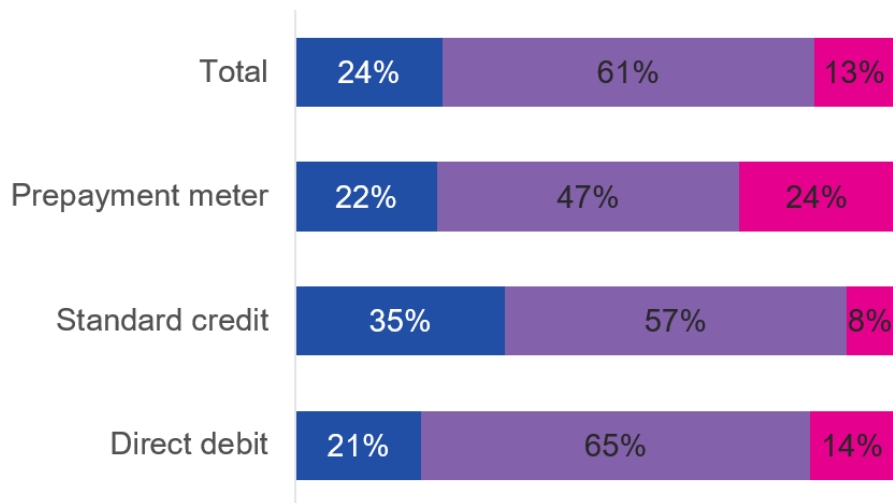
G7: Have you been in contact with your energy supplier about help with paying your bills?
 Base: run out of credit/fallen behind or don't know for affordability reasons, August/September 2023 (555)

Certain groups, including those on the PSR (22%) and consumers who say they have been struggling financially (struggling to keep up with their bills and commitments, also at 22%), were more likely to say their supplier reached out to them. However, despite above-average supplier contact rates, it remains that less than one in five reported that their supplier initiated the communication.

When contacted by supplier

Among the 17% of respondents who had been contacted by their supplier about help with paying their bills, about a quarter (24%) reported being contacted before they fell behind or ran out of credit for affordability reasons, three in five (61%) just after, and one in ten (13%) quite a while after. No statistically significant differences by payment type were seen due to low base sizes (91 overall).

Figure 29: When contacted by their supplier about help with paying bills



- Before fallen behind/ran out of credit
- Just after fallen behind/ran out of credit
- Quite a while after fallen behind/ran out of credit

G7: Have you been in contact with your energy supplier about help with paying your bills? (673)

G8: And when did your energy supplier get in contact with you about help with paying your bills?

Base: contacted by supplier (91)

Methods of contact with supplier

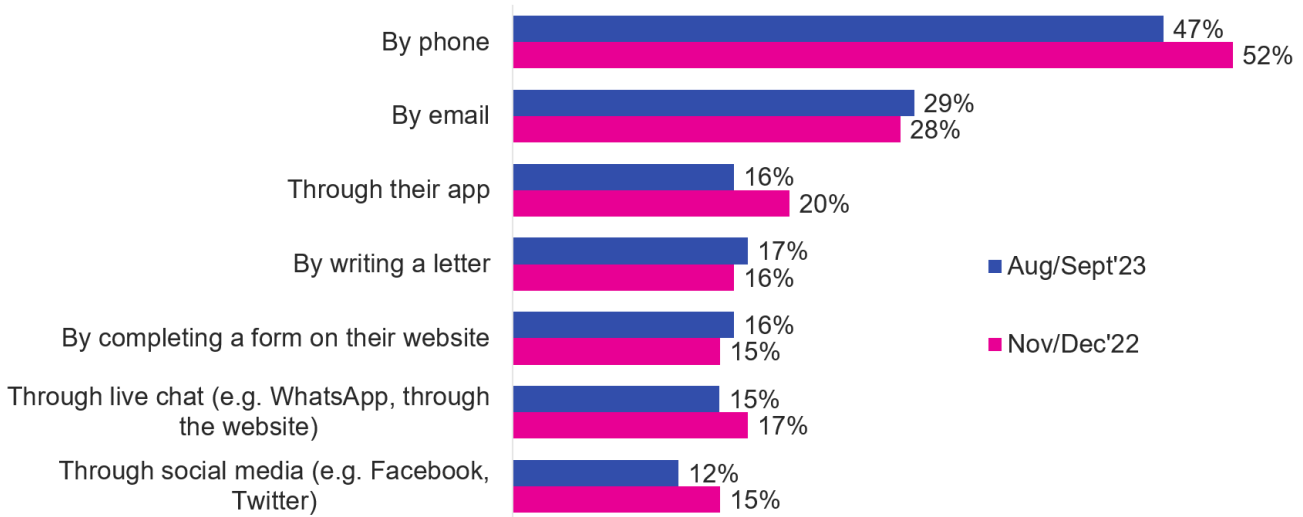
Those who had contacted, or been contacted by, their energy supplier about help with paying their bills were asked which methods they had used to do so.

As was the case in November/December 2022, telephone was the most common method of contact for these consumers, mentioned by half (47%), followed by email, mentioned by three in ten (29%), and the supplier’s app, mentioned by one in six (16%).

Around one in six had contacted, or had been contacted, via letter (16%), via a form on the supplier’s website (15%), through live chat (17%) and via social media (15%).

There were no significant differences in methods of contact with suppliers compared to November/December 2022.

Figure 30: Method of contacting supplier about help with paying bills, among those who have run out of credit/fallen behind for affordability reasons



G9: You mentioned that you have been in contact with your energy supplier about help with paying your bills. Which method or methods have you used to do this?

Base: contacted or been contacted by their supplier and online and fell behind for affordability reasons: August/September'23 = 363 (November/December'22 = 343)

Support offered by supplier

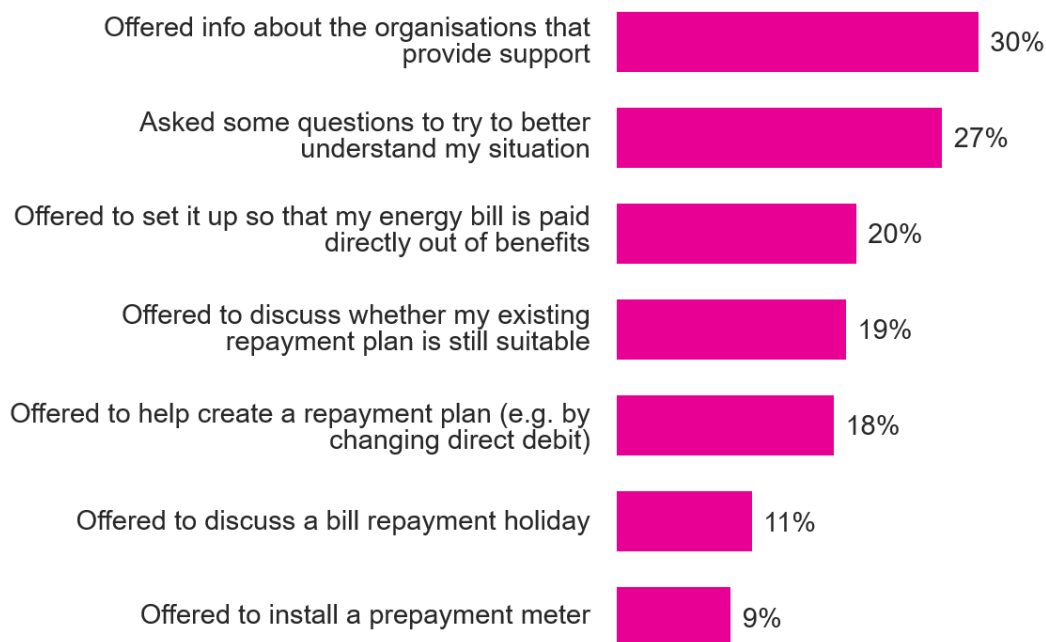
Among those who had contacted, or been contacted by, their supplier, eight in ten (82%) said they were offered at least one type of support.

For this group, support was most commonly non-financial, with three in ten (30%) offered information about organisations that provide support, a quarter (27%) asked some questions to try to better understand their situation, and around one in five offered the option to have their energy bill paid directly out of benefits (20%).

11% of consumers who contacted or were contacted by their supplier say they were only offered information about the organisations that provide support and not offered any other form of support.

Among the 36% who had discussed a repayment plan with their energy supplier, 85% were asked how much they could afford to pay, in line with November/December 2022 (79%). However, base sizes for this question were low, meaning that this finding should be taken as indicative only.

Figure 31: Support offered by supplier among those who have run out of credit/fallen behind for affordability reasons



G12: Please could you say whether your supplier offered to support you in any of the following ways, without you asking?

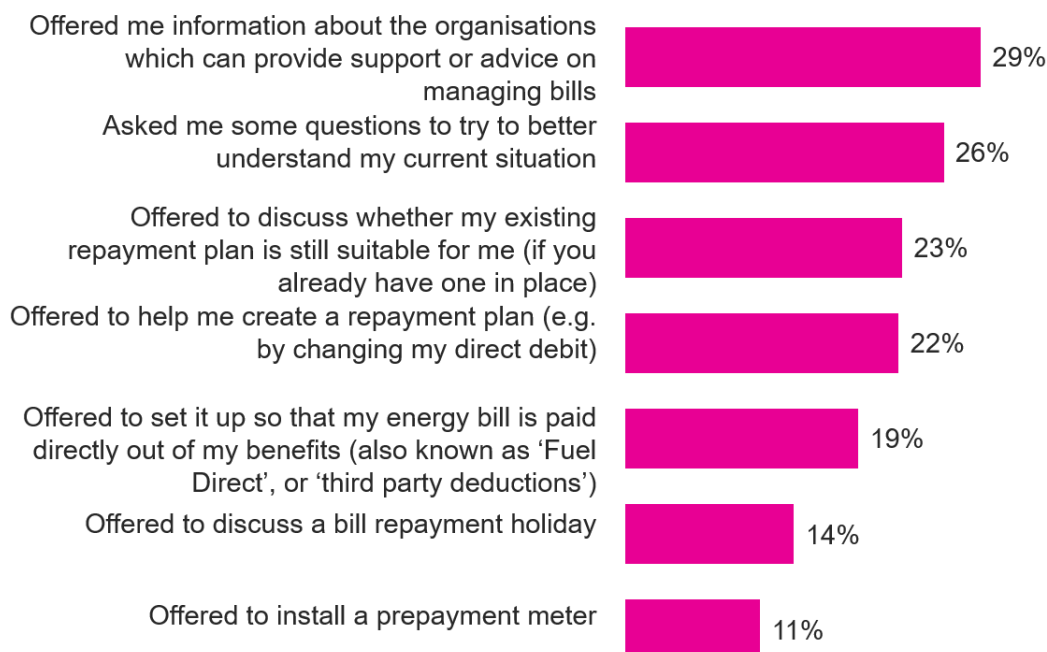
Base: contacted/been contacted by their supplier and fell behind/ran out for affordability reasons. August/September 2023 (363)

Similar proportions of credit meter and prepayment meter customers who had been in contact with their supplier said they had been offered support (82% and 80% respectively).

As shown in figures 38 and 39, in both instances, customers report that they were most commonly offered information about organisations that can provide support or advice on managing bills (29% and 36% respectively) or were asked some questions to try to better understand their situation (26% and 30% respectively).

Credit meter customers report being offered a range of other support, including discussions regarding existing repayment plans (23%) and help to create a repayment plan (22%). For prepayment customers, setting it up so the bill is paid directly from benefits (26%) was the only other support offered to more than 4% of respondents.

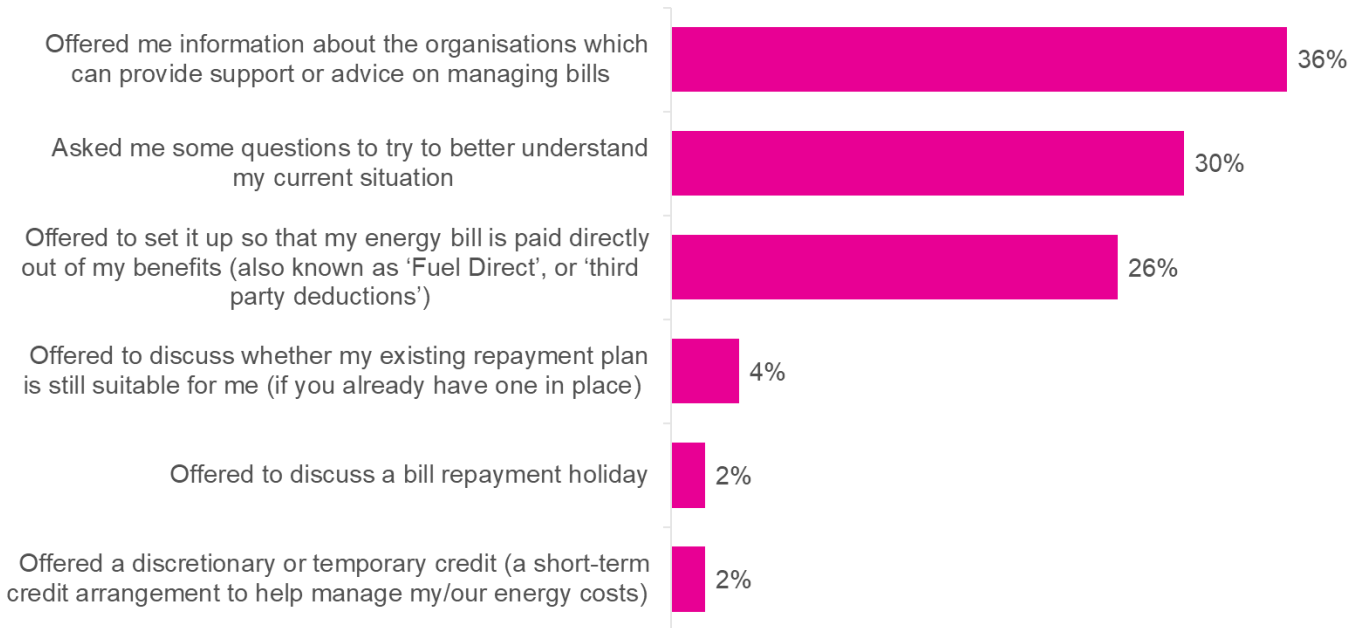
Figure 32: Support offered by supplier among credit meter customers who have fallen behind for affordability reasons



G12: Please could you say whether your supplier offered to support you in any of the following ways, without you asking?

Base: August/September 2023, contacted/been contacted by their supplier and credit meter and fell behind for affordability reasons (278)

Figure 33: Support offered by supplier among prepayment customers who have run out of credit for affordability reasons



G12: Please could you say whether your supplier offered to support you in any of the following ways, without you asking?

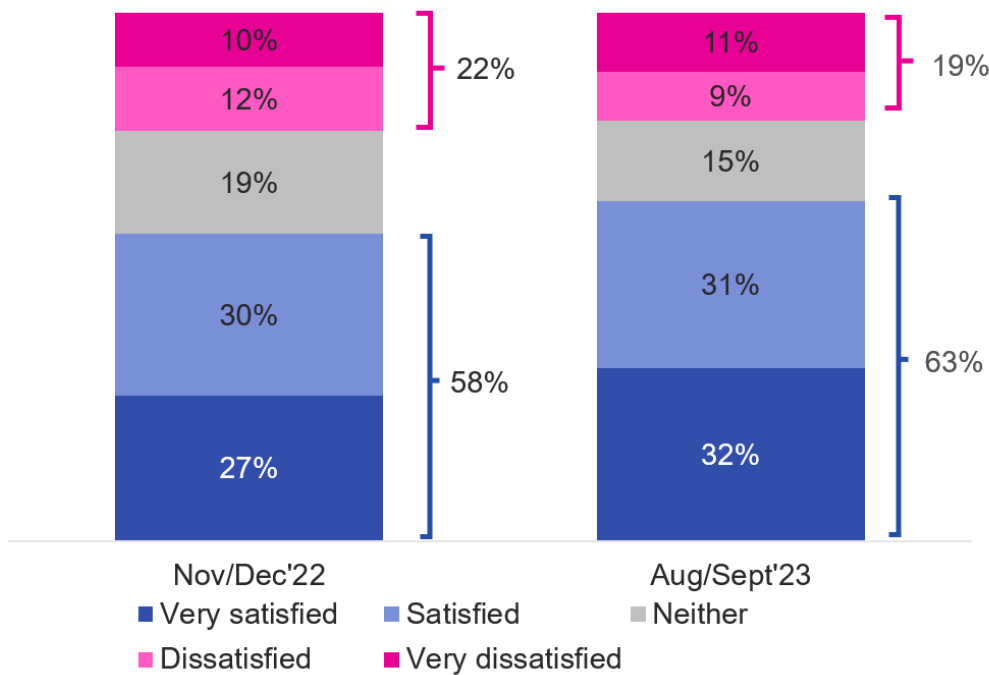
Base: August/September 2023, contacted/been contacted by their supplier and prepayment and ran out of credit for affordability reasons (91)

Options mentioned by 1% or less not shown

Satisfaction with support offered by supplier

Among those who had fallen behind or run out of credit for affordability reasons and had contact with their supplier about this, two thirds (63%) were satisfied with the support they received in paying their bills. This was in line with November/December 2022. Dissatisfaction has also remained in line at 1 in 5 (19%). Stacked bar chart showing satisfaction with support offered from suppliers for paying for energy among those who have run out of credit/fallen behind for affordability reasons. 63% net satisfied and 19% net dissatisfied. 32% very satisfied, 31% satisfied, 15% neither, 9% dissatisfied, 11% very dissatisfied. All are in line with Nov/Dec'22.

Figure 34: Satisfaction with support offered from suppliers for paying for energy among those who have run out of credit/fallen behind for affordability reasons



G10: Overall, how satisfied or dissatisfied are you with the support you have received from [supplier] about paying your bills?

Base: contacted or been contacted by their supplier and online and fell behind/ran out for affordability reasons: August/September 2023 (363), November/December 2022 (339)

However, it was those struggling the most financially who reported the highest levels of dissatisfaction. 35% of those classified as highly vulnerable were dissatisfied. Likewise, 27% of those behind on general bills and 26% of those with a household income of less than £20k per year were also dissatisfied.

Experience of contact with supplier

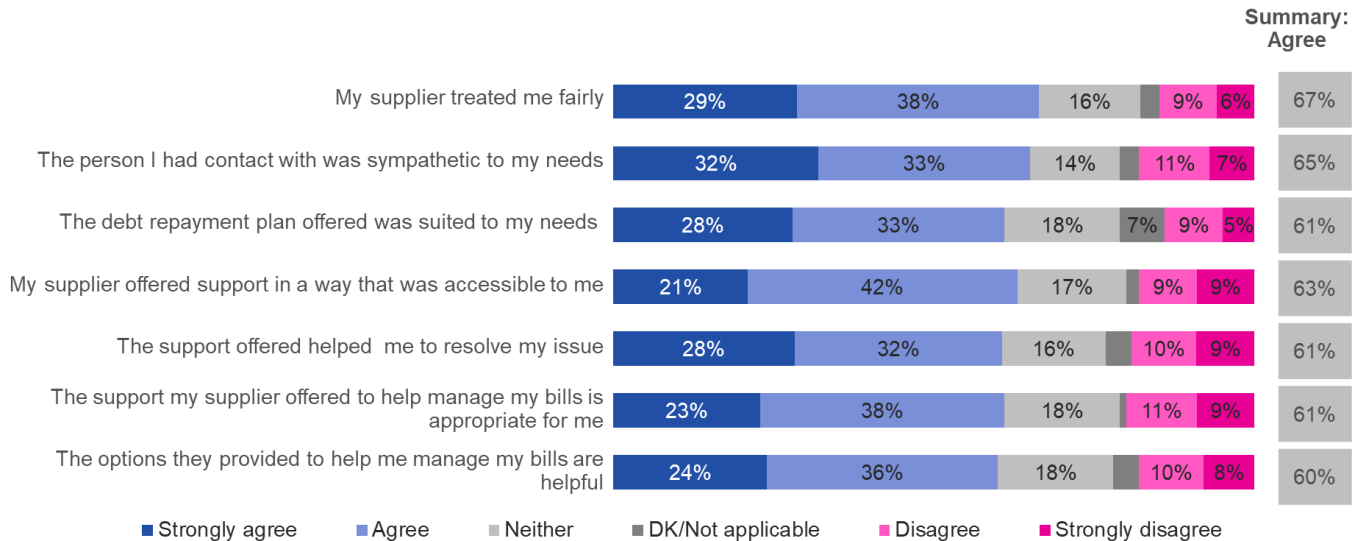
Among those who had spoken to their supplier about support for paying bills, two thirds (67%) agreed that their supplier had treated them fairly. A similar proportion agreed that they were sympathetic (65%), that they offered accessible support (63%) and that the debt repayment plan was suited to their needs (61%).

While six in ten (61%) agreed that the support offered helped them resolve their issue, one in five (20%) disagreed that this was the case. This pattern was replicated with the appropriateness of the support offered (61% agreed and 20% disagreed) and the helpfulness of the options offered to help manage bills (60% agreed and 18% disagreed).

Those who disagreed the support offered helped them resolve their case were most likely to be struggling financially. Consumers classified as highly financially vulnerable were less likely to find the support helpful, with 30% disagreeing, compared to just 10% in the financially stable 'doing well' group. stacked bar chart showing agreement with aspects of contact with supplier.

67% agree supplier treated them fairly, 65% agree the person I had contact with was sympathetic to my needs. 61% agree the debt repayment plan offered was suited to my needs. 63% agree the supplier offered support in a way that was accessible. 61% agreed the support offered help resolve my issue. 61% agreed the support offered was appropriate for their needs. 60% agreed the options provided were helpful.

Figure 35: Experience of contact with supplier



G13: To what extent do you agree or disagree with the following statements about the contact you've had with your energy supplier about paying your bills? Please answer on a scale of 1 to 5 where 1 is strongly disagree and 5 is strongly agree.

Base: contacted/been contacted by their supplier and fell behind/ran out for affordability reasons, August/September 2023 (363). Options 4% or below not charted.

How satisfied are consumers with other services provided by their suppliers?

Smart meters

Overview of findings

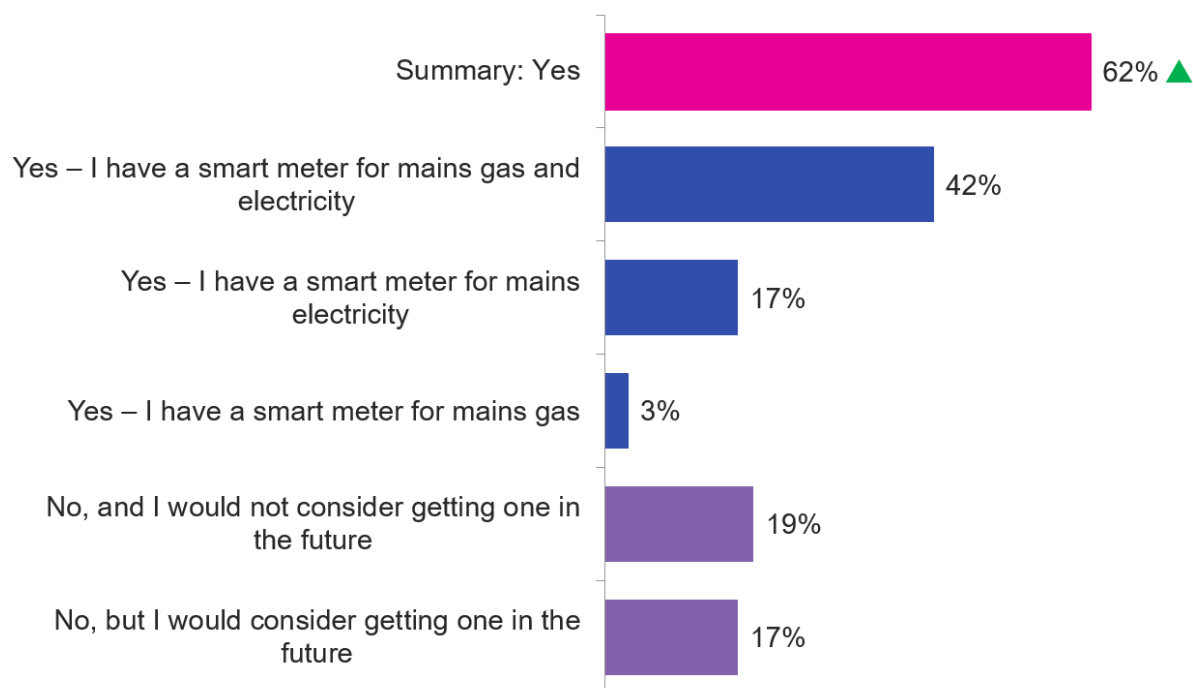
- **1 in 5 would not consider getting a smart meter:** three in five (62%) reported having a smart meter, a slight increase on November/December 2022. One in five (19%) reported that they do not have a smart meter and that they would not consider getting one – this was equivalent to 52% of those currently without a smart meter.
- **Willingness to share data:** the majority of consumers with a smart meter said they would be willing to share data with their supplier so that they could receive tailored information (81%), or for identifying if they need support for paying bills (70%).
- **Issues are commonplace:** over a third (37%) of households with a smart meter had experienced an issue with it in the last 3 months. Issues around automatic readings were the most common fault (12%), followed by in-home displays no longer working (11%). Issues with smart meters were far more common for those who had prepayment meters (46%) and those who paid by standard credit (60% compared to 33% for direct debit).
- **Two-thirds satisfied with their smart meter:** two-thirds (67%) of those with smart meters were satisfied with their smart meter, with just 12% dissatisfied. Those more likely to be dissatisfied with their smart meter included those classified as being at high risk of being under cost of living pressure (18%) and those who had fallen behind on bills/run out of credit (17%).

Smart meter households

Overall, three in five (62%) reported that their household had a smart meter, a slight increase on 60% in November/December 2022. This is consistent with official figures on smart meter installations in Great Britain (60% in Q3 2023)¹³.

One in five respondents (19%) said they did not have one and would not consider getting one. A similar proportion (17%) said that they would consider getting one in future. Accordingly, among the 36% that did not have smart meter, 52% say they would not consider getting one in the future.

Figure 36: Prevalence of smart meters



C1. Do you have a smart meter in your household?
Base: all respondents, August/September 2023 (3,742)

Some demographic groups were significantly more likely *not* to consider getting a smart meter in the future, including those aged over 65 (27%) and those who are digitally excluded (27%).

Consumers who had fallen behind on their bills or run out of credit on their pre-payment meter for affordability issues were less likely to say they would not consider getting a smart meter (11% compared to an average of 19%).

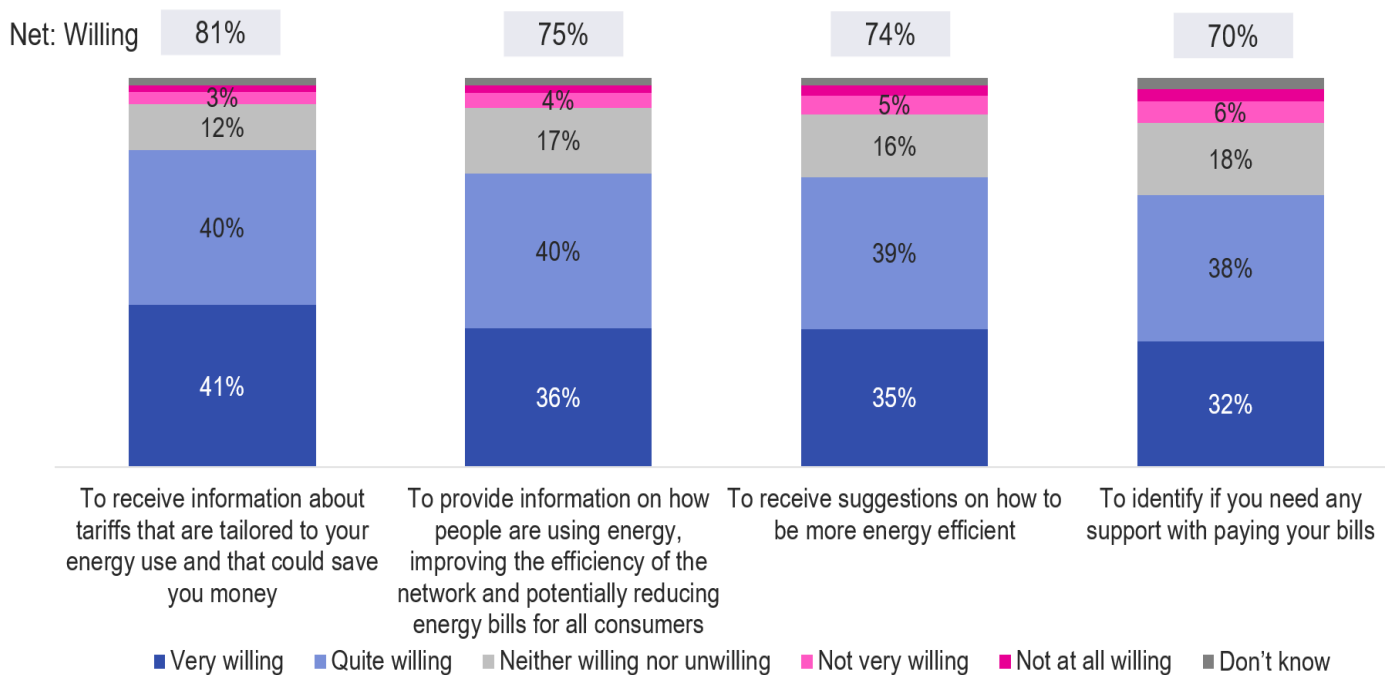
¹³ See Smart meters in Great Britain, quarterly update September 2023 - [Smart meter statistics - GOV.UK](https://www.gov.uk/government/statistics/smart-meter-statistics)

Smart meter data

Consumers with smart meters were generally quite open to sharing their smart meter data with their supplier for specific purposes. As many as 81% of users were willing to share their smart meter data with their suppliers to receive tailored information about tariffs that could save them money. Around three quarters said they would be open to providing information on how people are using energy to improve network efficiency (75%) and to receive suggestions on how to be more energy efficient (74%). Willingness to share this data with suppliers so that they can use it to identify if support is needed to pay bills was also high, at 70%.

Those who had fallen behind on their bills or run out of credit for affordability reasons were more willing (75%) to share their data with their supplier to identify if they needed any support paying their bills than those who hadn't (69%).

Figure 37: Willingness to share meter data among those with a smart meter



C4. With that in mind, how willing would you be to share this data with your supplier for each of the following purposes?

Base: those with a smart meter, August/September 2023 (2,248)

Data labels not shown for values below 3%

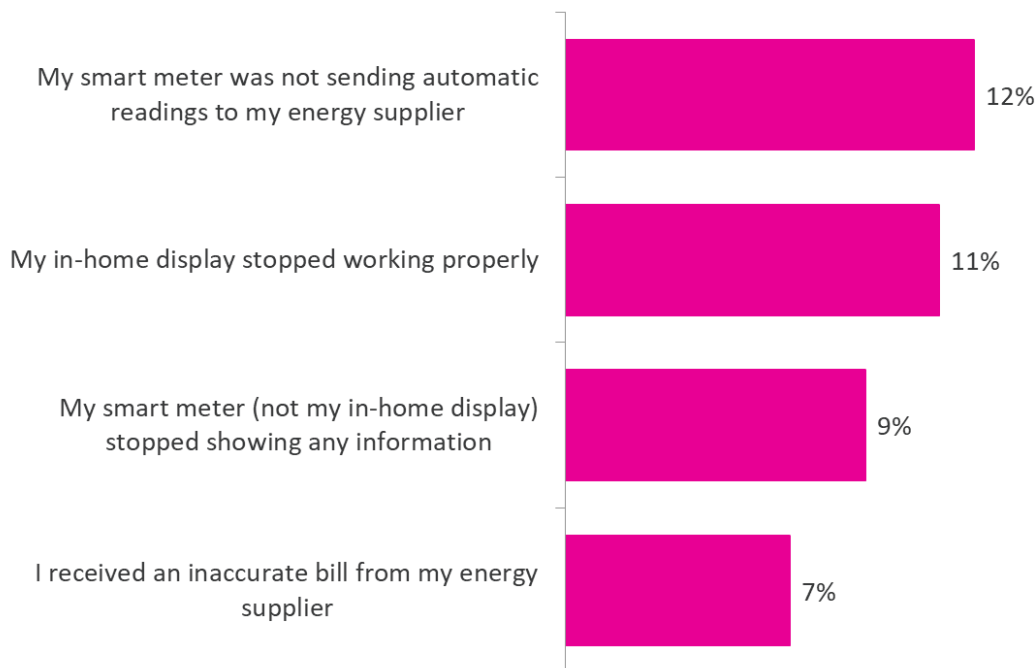
Issues with smart meters

Overall, close to two in five (37%) respondents with smart meters reported experiencing issues with them in the last three months.

Issues most commonly experienced were that the smart meter was not sending automatic readings to the energy supplier (12%), the in-home display stopped working properly (11%), or the smart meter stopped showing any information (9%).

Around one in twenty reported that they received an inaccurate bill from their supplier (7%).

Figure 38: Experiences of issues with smart meter in the last three months



C9. In the last 3 months, have you encountered any of the following issues or problems with your smart meter?
Base: those with a smart meter, August/September 2023 (2,248)

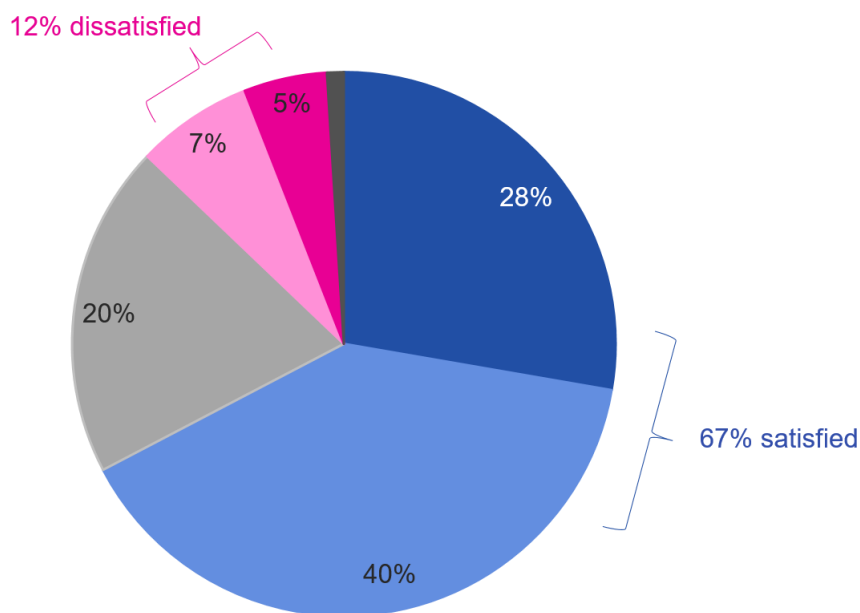
Consumers paying by standard credit and prepayment meter were significantly more likely to say they had experienced issues with their smart meters (60% and 46% compared to 33% of direct debit customers).

The most significant issues for standard credit customers were smart meters not sending automatic readings to their supplier (19% compared to 11% for direct debit) and the in-home display not working properly (18% compared to 10% for direct debit).

The top issue for prepayment customers was the prepaid credit top-up not showing on the in-home display (14%). Additionally, 10% of prepayment customers reported that their prepaid credit top-up did not go into their account.

Two-thirds (67%) of those with smart meters expressed satisfaction with it, while one in ten (12%) were dissatisfied, and the remaining 20% were neither satisfied nor dissatisfied.

Figure 39: Satisfaction with smart meter



■ Very satisfied ■ Satisfied ■ Neither ■ Dissatisfied ■ Very dissatisfied ■ Unsure

C6.

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

Base: those with a smart meter, August/September 2023 (2,248)

Those classified as highly financially vulnerable were more likely to say they were dissatisfied with their smart meter (18%), as were those who had fallen behind with their bills/run of credit for affordability reasons (17%).

Despite higher reported issues for those paying by standard credit and prepayment meters, satisfaction with smart meters showed little variation by payment type.

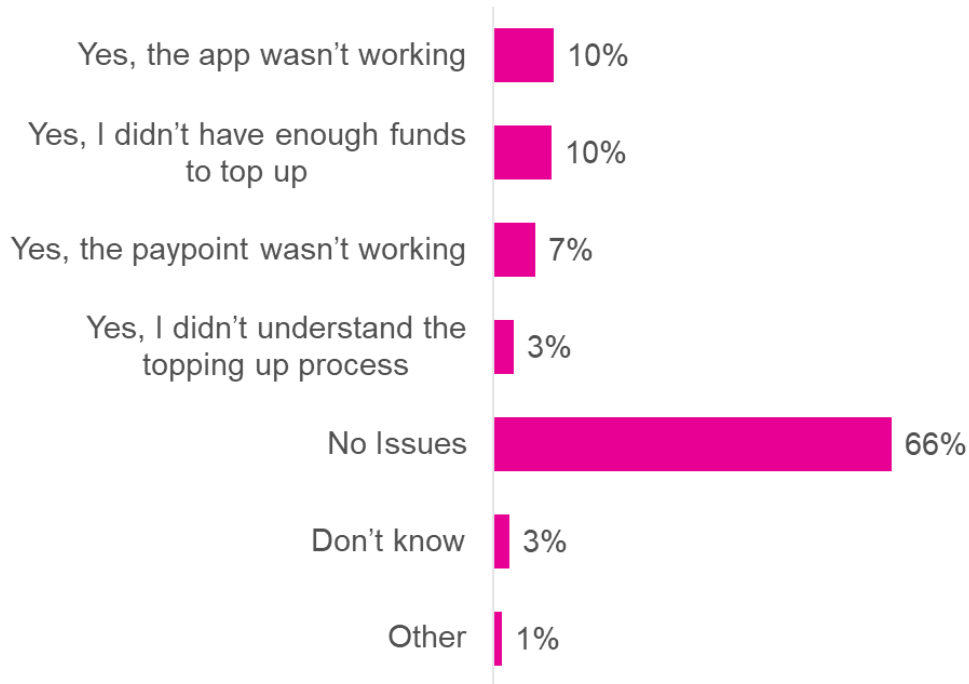
The smart meter not sending automatic readings (36%), the in-home display not working (34%), and the smart meter (not in-home display) not showing any information (34%) were the issues most likely to be linked with dissatisfaction.

Topping up prepayment meters

Three in ten (31%) prepayment customers reported encountering an issue when they last topped up their prepayment meter. This includes one in five (17%) who encountered a technical problem: 10% said the app was not working, and 7% said the pay point was not working.

The majority (66%) did not encounter an issue when topping up their prepayment meter.

Figure 40: Issues encountered when last topped up prepayment meter



G26: On the last occasion you tried to top up your prepayment meter using your preferred method, did you encounter any issues?

Base: using a prepayment meter August/September 2023 (768)

Priority services register (PSR)

Overview of findings

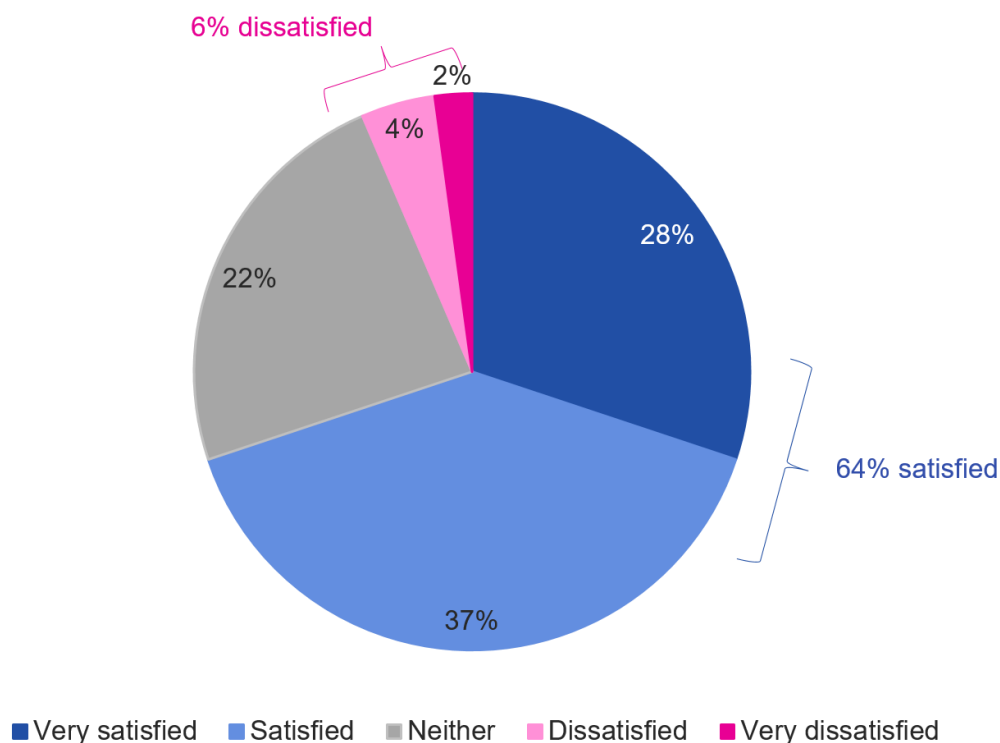
- **A third said they were on the PSR, but many eligible were not on it:** one in three (35%) households reported being on the Priority Services Register (PSR), but this was well below the 60% who were likely eligible based on the demographic criteria.
- **Most on the PSR were satisfied:** two thirds (64%) were satisfied with the services they had received by being on the PSR. Those aged 65 or over were less likely to be satisfied (57% satisfied compared to 64% overall). However, satisfaction rates for other eligible groups, including those with a long-term illness, physical or mental health problem or disability or who are pregnant/ have a child under 5 in the household were in line with the average.
- **Most who received information about the PSR from their supplier found it useful:** three in ten (29%) said they had received information about PSR eligibility, with a similar share saying they had received information on the benefits of being on the PSR (28%). Of those receiving this type of information, the vast majority found it useful (86% and 85%, respectively).

Satisfaction with the services received by being on the PSR

A third (35%)¹⁴ of households reported being on the PSR which, as set out in the latest Consumer Impacts of Market Conditions report¹⁵, is well below the proportion who are likely to be eligible (60%).

Among this group, two thirds (64%) were satisfied with the services received by being on the PSR, while just 6% were dissatisfied.

Figure 41: Satisfaction with the services received by being on the PSR



A10. Please could you say how satisfied or dissatisfied you are overall with the services you have received by being on the Priority Services Register?

Base: those on the Priority Services Register, August/September 2023 (1,326)

Those aged 65 or over were less likely to be satisfied with the services received by being on the PSR (57% compared to 64% for 50-64, 71% for 35-49 and 68% for 18-34 year olds). However, there were no differences by whether households included somebody pregnant or a child under 5, nor somebody with a long-term illness, physical or mental health problem or disability.

Information about PSR eligibility

Three in ten (29%) said they had received information on whether they were eligible for the PSR, and a similar proportion (28%) said they had received information about the benefits of being on the PSR.

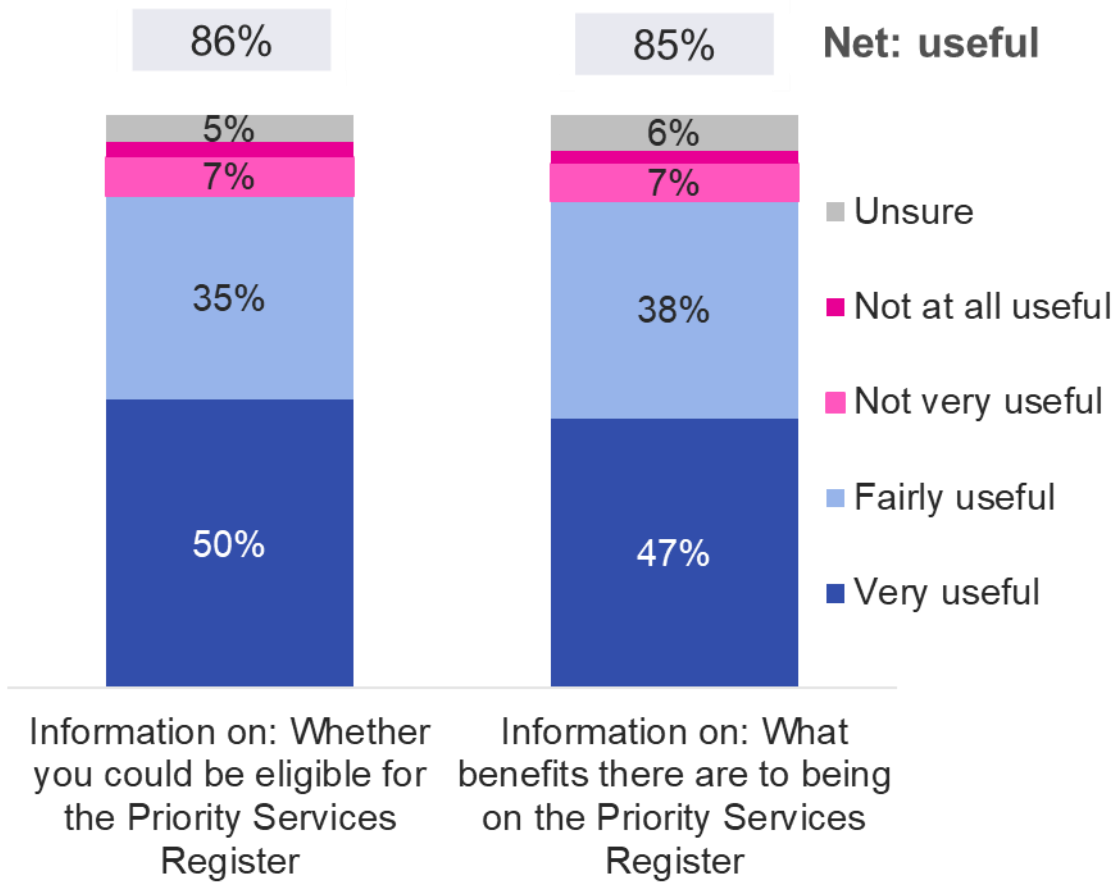
¹⁴ Lower than reported in CIM as this survey reports on all respondents whereas CIM reports on all those aware of the PSR

¹⁵ See Ofgem [Consumer impacts of market conditions survey - wave 4 \(July 2023\) | Ofgem](#)

Those with a long-term illness, physical or mental health problem or disability, and those pregnant or with a child under 5 were more likely to have received information on whether they were eligible for the PSR (39%).

A large majority said they found the information they received on each of these useful (86% and 85% respectively). stacked vertical bar chart showing usefulness of information received from being on the PSR. Information on whether you could be eligible for the PSR 50% said very useful, 35% said fairly useful, 7% said not very useful and 5% said unsure. Information on benefits to being on the PSR 47% said very useful, 38% said fairly useful, 7% said not very useful and 6% unsure.

Figure 42: Usefulness of information about the PSR



D3_12/D3_13. How useful was the information you received for each of the following...
 Base: August/September 2023, received information about whether you could be eligible for the Priority Services Register (1,093) / received information about what benefits there are to being on the Priority Services Register (1,076)
 Data labels not shown for values below 3%

Those with a long-term illness, physical or mental health problem or disability were more likely to say they found the information they received on whether they were eligible for the PSR useful (89%).

Switching suppliers and changing payment types

Overview of findings

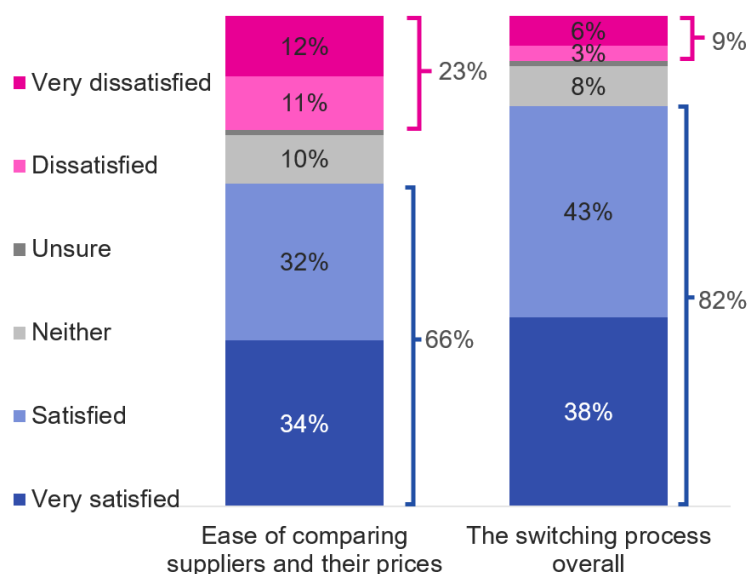
- **Satisfaction with the supplier switching process has recovered:** respondents were generally satisfied with the overall supplier switching process (82% satisfied) but less so with the ease of comparing suppliers and their prices (66% satisfied). After a marked decline from late 2021 onwards, satisfaction with the process has largely recovered. Still, satisfaction with the ease of comparing suppliers and their prices remains well below levels seen in 2019/20.
- **Few changes to prepayment meter were involuntary:** almost half (49%) requested the payment method change to prepayment meter themselves and, where the supplier initiated, few suggested the switch was involuntary (7%).
- **Many prepayment meter customers said they tried to change payment type but were unable to:** one in five (21%) of current prepayment consumers said they tried to change their payment method in the last three months. Around half of those who had attempted to change how they pay had been unable to because the supplier prevented them, or because of outstanding debts (12% of total prepayment customers).

Satisfaction with aspects of switching supplier

Among the 7% of respondents who had switched supplier, two thirds (66%) were satisfied with the ease of comparing suppliers and their prices, while a quarter (23%) were dissatisfied in this respect.

In relation to the switching process overall, four in five (82%) were satisfied, and one in ten (9%) were dissatisfied.

Figure 43: Satisfaction with aspects of switching supplier among those who had switched supplier



F2. 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:

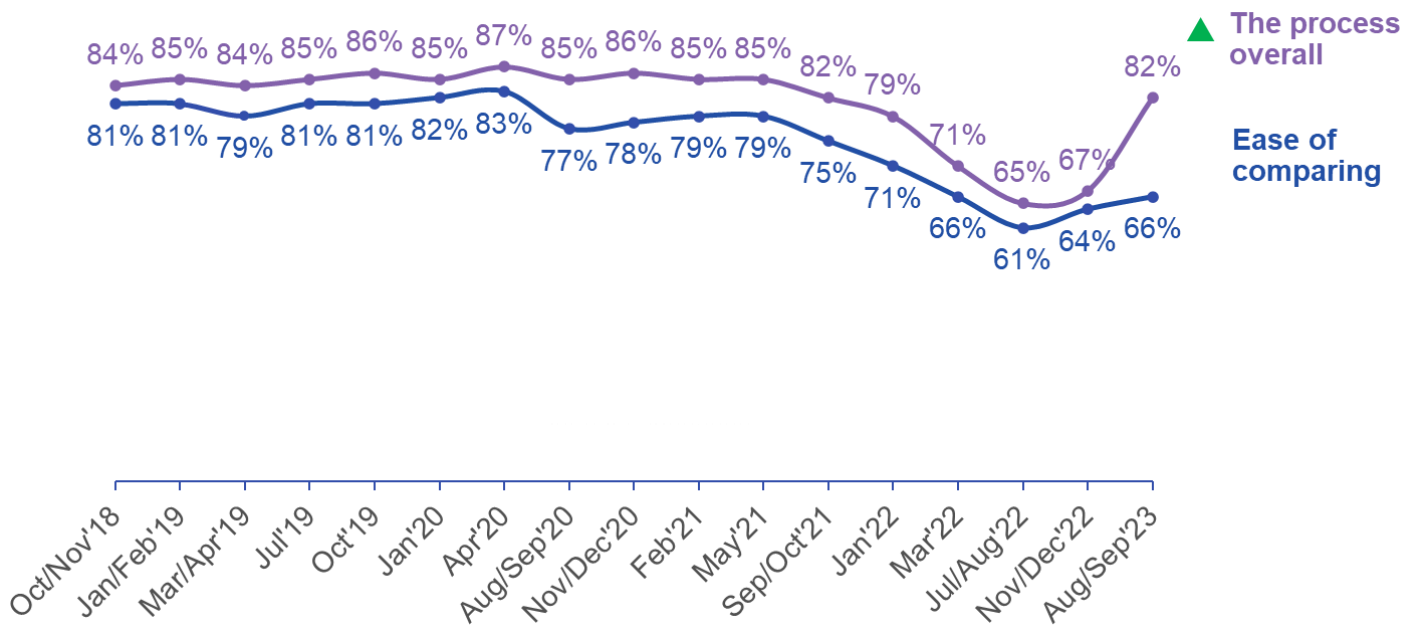
Base: those who switched energy supplier, August/September 2023 (259)

Data labels not shown for values below 3%

In terms of the ease of comparing suppliers and their prices, although no longer falling, this measure remained well below that seen from 2019 to 2021.

In relation to the switching process overall, there has been a significant uplift in satisfaction levels since November/December 2022 (67%), returning this measure to the levels seen prior to the decline that began in September/October 2021. It is worth stating, however, that there was a longer period of time between this wave (Aug/Sep 2023) and the last (Nov/Dec 2023) in comparison to previous waves, which may contribute to this substantial uplift in satisfaction with the overall switching process.

Figure 44: Satisfaction with aspects of switching supplier over time



F2. 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:
 Base: those who switched energy supplier, August/September 2023 (259)

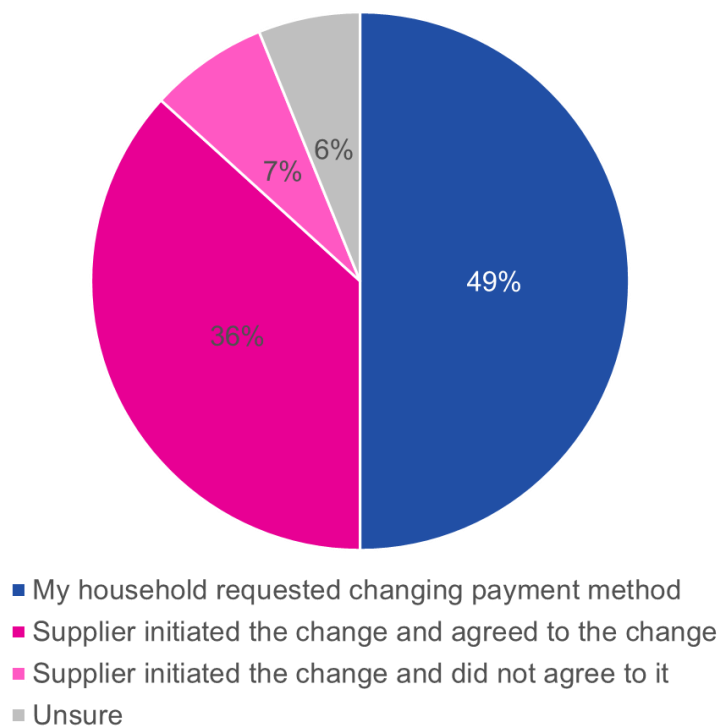
Changing payment methods: from credit meter to prepayment meter

Around one in seven respondents reported having changed their payment method for electricity (16%) and for gas in the last 6 months (15%). However, it is worth noting market data indicates that this seems artificially high. As such, this finding should be treated with caution.

The remainder of this section focuses on the 2% of consumers who changed from a credit meter (i.e. standard credit or direct debit) to a prepayment meter in the last 6 months. The following findings should be treated as indicative given that the sample sizes were low.

In half of instances (49%), the payment change to prepayment meter from credit meter was initiated by the respondent. Over a third (36%) said the supplier initiated the change but they agreed to it, whereas 7% claimed not to have agreed to the supplier initiating the change. 6% said they were unsure and 2% said they preferred not to answer the question.

Figure 45: How the change to prepayment meter was initiated



B13/B13A. When you changed payment method for gas and or electricity, did you make a request to your energy supplier to change your payment method or did they initiate the change?

Base: changed payment method from credit meter to prepayment meter for gas and/or electricity in last 6 months, August/September 2023 (107)

From February 2023 until after this survey was conducted, there was a moratorium in place preventing suppliers from installing a prepayment meter in consumers' homes under warrant to recover debt. As such, we would not expect to have seen prepayment meters installed under warrant to recover debt during this time. Thinking of the 7% who claimed not to have agreed to the supplier initiating the change to prepayment meter, it is worth noting that bias in recall may have impacted the way in which

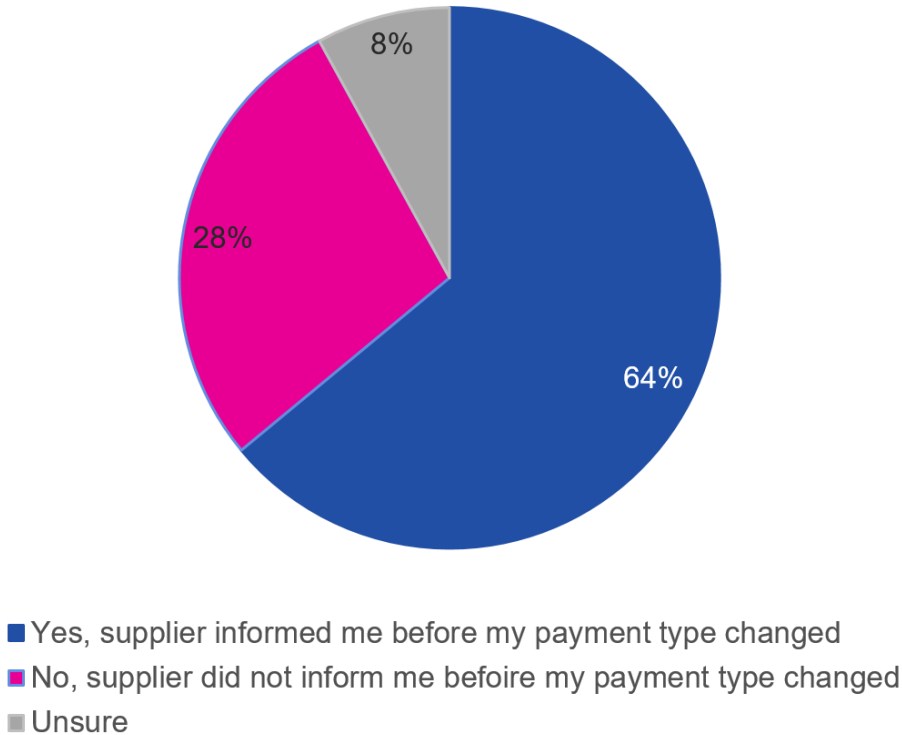
respondents answered this question, given that respondents were asked to think about an event that took place up to 6 months ago. It is also feasible that there may have been slight variation in the way in which respondents interpreted this question.

Whether informed prior to change to prepayment meter

Around two thirds (64%) reported that they had been informed before the change from credit meter to prepayment meter happened. However, over a quarter (28%) reported that they were not. It is worth noting that respondents were not provided with a prompt on what “informed” meant within the context of answering this question.

This means that respondents may have interpreted, and therefore answered, this question in different ways. For example, it is possible that a respondent may have been informed prior to the change to prepayment meter, but that they would have liked to have been informed at an earlier point. It is also likely that there may have been recall issues at play, both in terms of whether they reported on activities in the last 6 months and whether they can remember being informed or not.

Figure 46: Whether informed before the change to prepayment meter happened



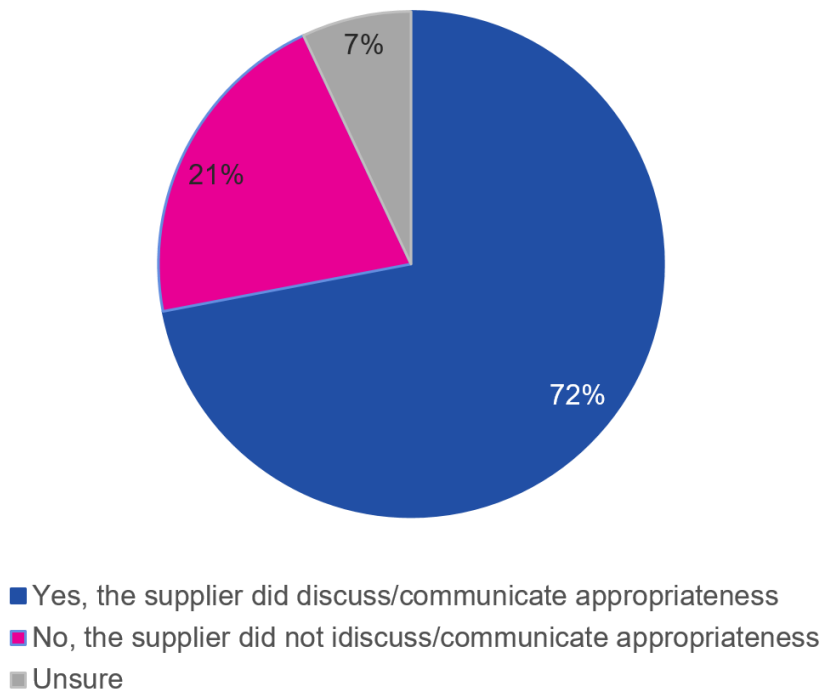
B14/B14A. When you changed payment method for electricity/gas, were you informed before the change happened?

Base: changed to prepayment meter from credit meter in last 6 months for electricity and/or gas, August/September 2023 (107)

Supplier communication about the appropriateness of the change to prepayment meter

While around seven in ten (72%) said that their supplier communicated with them about whether a prepayment meter was an appropriate payment method given their circumstances, around one in five (21%) said they did not.

Figure 47: Supplier communication about the appropriateness of the change to prepayment meter



B7/B7A. When you changed to a different payment method for electricity or gas, did your energy supplier discuss or have any communication with you around whether it was an appropriate payment method given your circumstances?

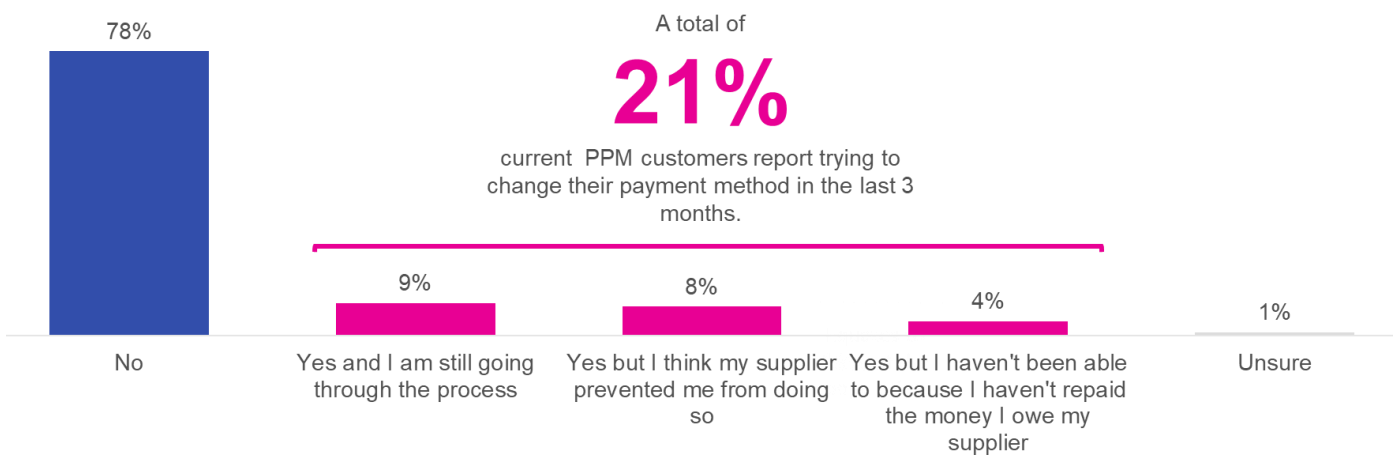
Base: changed to prepayment meter from credit meter in last 6 months for electricity and/or gas, August/September 2023 (107)

Attempts to change from prepayment method

One in five (21%) of prepayment customers reported having tried to change payment methods in the last three months. This included 9% who were still going through the process, 8% who believed their supplier was preventing them from doing so, and 4% who had not been able to because they had not repaid the money they owed their supplier (a total of 12% who either said their supplier prevented them or because they owe their current supplier money).

Ofgem’s market monitoring data from Q1 and Q2 2023 confirms that during that period fewer than 1% of PPM electricity consumers changed to paying via a credit meter.

Figure 48: Attempts to change from prepayment method



B12. Have you tried to change your current payment method in the last 3 months?

Base: those who have a pre-payment meter, August/September 2023 (727)

Among those respondents using one of the three main payment methods, 13% said that their energy supplier had communicated with them about changing their payment type in the last three months¹⁶. This rose to 19% among current prepayment customers and to 33% of current standard credit customers. In each case, a change to a direct debit or standing order (9% and 22% respectively) was most commonly communicated.

Figure 49: Communication about changes in payment method

Whether supplier has had communication about changing payment type	All consumers*	Current direct debit payers	Current standard credit payers	Current prepayment meter payers
No, they have not	79%	83% ▲	60% ▼	71% ▼
Yes, to change to a regular direct debit or standing order	4%	n/a	22% ▲	9% ▲
Yes, to change to paying only on receipt of a bill by cash/cheque/debit or credit card/BACS/App	5%	6% ▲	n/a	6%
Yes, to a prepayment meter	3%	3%	8% ▲	n/a
Yes, to change to another method	2%	2% ▼	5% ▲	4% ▲
Don't know	7%	7%	6%	9%
Summary: Communication about any change	13%	10% ▼	33% ▲	19% ▲

G30. In the last 3 months, has your energy supplier had any communication with you about changing your payment type?

Base: those paying using one of main three payment methods, August/September 2023 (3,607)

Green and red arrows indicate it is significantly higher/lower than all consumers

*All consumers who pay using the three main payment types. Excludes other payment types.

Of those who said they had communicated with their supplier about changing payment type, most (67%) thought the process would be easy, and this rose to 74% among those who had communicated with their supplier about changing from standard credit. Please note that the reasons driving these responses were not explored.

¹⁶ It is worth noting that respondents were not prompted on whether this was proactive communication initiated from their supplier.

Appendix

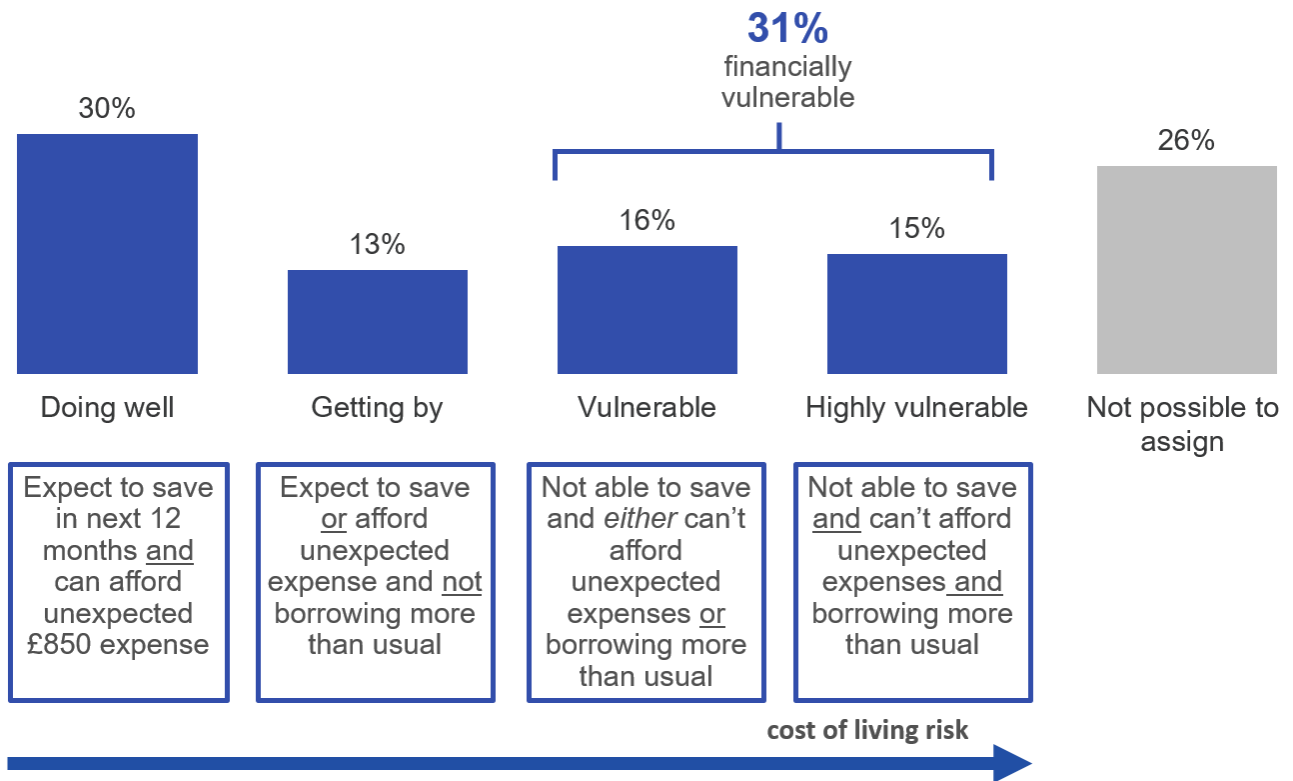
Defining the cost of living groupings

Many aspects that correlate with overall satisfaction are associated with socio-economic status, particularly indicators of how financially comfortable a household might be. In order to provide a summary metric of a respondent's overall financial circumstances in relation to the rising cost of living, we have combined three metrics – saving, debt and unexpected expenses – into classifications of financial vulnerability as a result of the cost of living crisis. These categories are defined as the following:

- **highly vulnerable** – those not able to save, and who cannot afford an unexpected but necessary expense of £850 and who are borrowing more than usual
- **vulnerable** – those not able to save, who either cannot afford an unexpected expense of £850 or are borrowing more than usual
- **getting by** – those who expect to save or can afford unexpected expense, who are not borrowing more than usual
- **doing well** – those who expect to save in the next 12 months, can afford an unexpected £850 expense, and who are not borrowing more than usual

On this basis, three in ten (30%) respondents are classed as doing well, and a further one in ten (13%) are grouped as getting by. By contrast, three in ten (31%) respondents can be said to be financially vulnerable, including 16% who are vulnerable and 15% who are highly vulnerable. We do not have historic data to understand the proportion of respondents who were financially vulnerable before the spike in energy prices. However, the current share of those who are demonstrates the wide extent of financial fragility across respondents.

Figure 50: Cost of living groupings using saving, debt and unexpected expense metrics



Derived variable

CL1: In view of the general economic situation, do you think you will be able to save any money in the next 12 months? CL2: Could your household afford to pay an unexpected, but necessary, expense of £850? CL3: Have you had to borrow more money or use more credit than usual in the last month, compared to a year ago?

Base: all respondents, August/September 2023 (3,742)

It was not possible to classify 26% of respondents because they answered 'don't know' or 'prefer not to say' to one or more of the questions.



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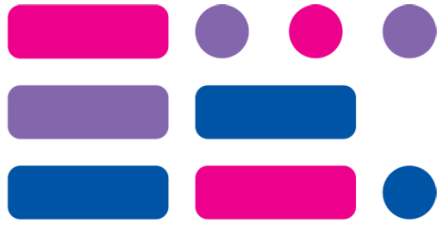
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