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Energy Consumer Satisfaction Survey

Wave 18

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Fieldwork conducted in January/February 2024

Prepared by BMG for Ofgem and Citizens Advice



Contents

Ofgem Foreword	4
Executive Summary.....	5
Satisfaction with energy suppliers is improving	5
Satisfaction has increased for two broad reasons.....	5
Support for those struggling financially remains unchanged.....	6
Other experiences	6
Background and research objectives.....	7
Background.....	7
Research objectives	7
Method.....	8
Timing of fieldwork.....	8
Data collection method	8
Notes on statistical significance.....	8
Detailed Findings	10
How satisfied are consumers with the overall service provided by their supplier?.....	10
Overview of findings.....	10
Overall satisfaction	11
Reasons for dissatisfaction	14
Reasons for satisfaction.....	14
How satisfied are energy consumers with the dimensions of customer service provided by their suppliers?	15
Overview of findings.....	15
Satisfaction with customer service.....	16
Reasons for dissatisfaction with customer service.....	18
Key drivers of customer service.....	20
Views on billing.....	23
Contacting suppliers	31
Complaints.....	43
Information Provided by Suppliers.....	47
What are the experiences of customers struggling financially?.....	50
Overview of findings.....	50

Falling behind or running out of credit for affordability reasons	51
Contact with supplier.....	53
Methods of contact with supplier	54
Support offered by supplier.....	54
Satisfaction with support offered by supplier	56
Experience of contact with supplier	57
How satisfied are consumers with other services provided by their suppliers?	61
Smart meters	61
Topping up prepayment meters.....	65
Priority Services Register (PSR).....	66
Switching suppliers and changing payment types.....	69
Appendix	77
Defining the cost of living groupings	77
Key Drivers Analysis.....	78
Demographic and energy characteristics model	78
Demographic, energy characteristics and supplier performance model	79

Ofgem Foreword

Households have faced significant challenges in recent years. While energy prices have fallen somewhat since Summer 2023, they remain well above pre ‘energy-crisis’ levels. Many households continue to struggle to pay for energy and meet other essential costs. Against this background it is vital that energy suppliers provide good service to their customers. And it remains Ofgem’s priority to protect energy consumers, particularly those in more vulnerable circumstances.

Ofgem interacts with the energy consumers it serves across England, Wales and Scotland in many ways. The Energy Consumer Satisfaction Survey is one tool that helps Ofgem understand domestic energy consumers’ perceptions relating to the quality of service they receive from energy suppliers. Beginning in 2018, the survey tracks consumers’ perceptions of several key performance indicators, including satisfaction with the ease of contacting suppliers, billing, complaints handling, the information provided by their supplier, switching, support provision to those in need, and overall. In doing so, the survey compliments other sources of customer service performance levels in the energy market.

This report details findings from the 18th wave of the Energy Consumer Satisfaction Survey, drawing on research conducted in January-February 2024. The survey retains comparability with previous waves, although it is worth noting that the survey underwent a refresh in wave 17, intended to better capture insights into consumers’ experiences of the service levels provided by their energy suppliers.

In December 2023 [Ofgem implemented changes](#) 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. The changes were implemented on 14th December 2023, just before fieldwork for this survey wave was collected. It is too early to draw links between the introduction of these changes and the results of this survey wave but, looking ahead, we hope to see sustained improvements once the new rules have baked in.

In alignment with our [Multiyear Strategy](#) Ofgem will continue to proactively engage with consumers to ensure a direct understanding of consumers’ experiences and outcomes in the market. Ofgem’s research and monitoring activities will continue to play a vital role in this, helping to assess whether energy consumers in Great Britain are getting the quality of service and support they need and expect from their suppliers.

The next wave of research for this survey is due to take place in Summer 2024.

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 3,855 interviews with a representative sample of energy bill payers across Great Britain, are described below.

Satisfaction with energy suppliers is improving

Overall, the results for January/February 2024 have moved in a positive direction. Following declines throughout 2022 and 2023, the overall satisfaction and customer service satisfaction metrics have improved compared to the last wave of this survey conducted in August/September 2023¹.

These improvements place satisfaction levels back in line with those recorded in 2021 and 2022 but still below the peaks of 2020, where satisfaction was at its highest level since the tracker began in 2018. More specifically, we find:

- Three quarters (73%) were satisfied overall with their supplier, compared to 69% in August/September 2023, a level last achieved in May 2021. This compares to a peak of 78% in April 2020.
- Satisfaction with customer service also improved from 62% in August/September 2023 to 66% in the latest wave, halting its long-term decline since 2021. However, while in line with levels observed in 2022, it remains below the peak of 75% in April 2020.

Satisfaction has increased for two broad reasons

Firstly, there are early signs that consumers have been struggling slightly less with the cost of living. There has been an increase in consumers saying they were keeping up without difficulty with household bills and credit commitments (36% cf. 31% in August/September 2023), while the proportion saying they were keeping up but struggling also dropped (51% cf. 55% August/September 2023).²

This appears to have translated into improved satisfaction. Improvements in overall satisfaction and customer service satisfaction since August/September 2023 have come disproportionately from those consumers most vulnerable to the cost of living. Those classified as 'vulnerable' (67% cf. 61%) and 'highly vulnerable' (61% cf. 51%) to cost of living pressures have seen the largest improvements in satisfaction.

Secondly, direct improvements in various aspects of the consumer-supplier experience have also likely played a part in increased satisfaction. For example, the results show:

- Compared to August/September 2023, there has been an improvement in consumers' experiences of contacting their supplier, with the proportion rating it as easy increasing from 60% to 65% and the proportion finding it difficult decreasing from 23% to 19%.

¹ It is worth noting the seasonal difference between the current wave, which was conducted in winter (January/February 2024), and the last, for which research took place in late summer (August/September 2023).

² These findings are in line with latest Consumer Impacts of Market Conditions survey from January 2024, showing fewer consumers reporting that they took on extra debt, were struggling with other household costs, or were cutting back on essential spending due to energy expenses.

- Satisfaction with ease of understanding bills and bill accuracy has improved from 71% in August/September 2023 to 78% and from 70% in August/September 2023 to 74%, respectively³. At 78%, increased satisfaction with the ease of understanding is at its highest level since the tracker began in 2018. At 74%, satisfaction with bill accuracy has only previously been exceeded in November/December 2020 (77%).

Support for those struggling financially remains unchanged

Improvements to overall satisfaction and customer service satisfaction do not appear to be linked to any changes around the support with energy payments offered to customers in financial hardship (energy consumers who have fallen behind or run out of credit for affordability reasons).

This is for two reasons. Firstly, there is no evidence that more consumers have been receiving support. Half (48%) of those who had run out of credit/fallen behind for affordability reasons reported having contacted their supplier about help with paying their bills, in line with August/September 2023. Indeed, significantly fewer reported being contacted by their supplier proactively (12% cf. 17% in August/September 2023).

Secondly, satisfaction with the support offered is also unchanged; two-thirds (61%) were satisfied with the support they received in paying their bills, which is in line with the previous two waves of this survey.

Those who were most financially stretched continue to express the highest levels of dissatisfaction with the support offered, with 35% of those classified as 'highly vulnerable' to the cost of living pressures dissatisfied, compared to 9% of those classified as 'doing well'. It is likely that those facing the most financial pressure are both in greater difficulty and in greater need of more extensive support to resolve their issues.

Other experiences

Besides customer service experiences, this survey examines a wide array of topics, including experiences with smart meters, the Priority Services Register (PSR), using prepayment meters, and switching suppliers. Key findings from across these topics include:

- Smart meter issues have reduced slightly, with a third (33%) of respondents with smart meters reporting experiencing issues with them in the last three months, lower than the 37% reported in August/September 2023. Despite this, satisfaction with smart meters has remained stable with August/September 2023 (68% cf. 67%)
- A third (33%) of respondents reported that either they or someone in their household is on the Priority Services Register (PSR). Among this group, three in five (61%) were satisfied with the services received by being on the PSR, in line with August/September 2023.
- Consumers reported finding it easier to compare suppliers relative to August/September 2023. Among the 7% of respondents who had switched supplier, around one in ten (13%) were dissatisfied with the experience of comparing suppliers, a reduction from the 23% who were dissatisfied in August/September 2023. In relation to the switching process overall, four in five (82%) were satisfied, and one in ten (8%) were dissatisfied, in line with August/September 2023.

³ Due to a scripting error in January/February 2024, only those with electricity and gas were asked about their satisfaction with billing. August/September 2023 was not impacted, and trending is still credible. For more detail on this error and comparability, see the billing section.

Background and research objectives

Background

This report, setting out results from January/February 2024 (wave 18), 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 3,855 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 are the experiences 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 second wave of this survey run by BMG Research. Fieldwork for this wave was conducted from 18 January to 10 February 2024. Comparisons to the previous wave are for 30 August to 18 September 2023.

Data collection method

Quotas were set to ensure a representative sample of the GB population of households.⁴ Results were weighted overall by age, gender, region, indices of multiple deprivation (IMD), ethnicity and payment type. The methodology is consistent with the last wave (wave 17) and details of updates that were made in wave 17 can be found in the accompanying technical report [here](#).

- The latest wave comprised 3,855 respondents in total. The data was collected through a combination of three methods:
- 3,404 consumers took part via online interview panels to capture the digitally enabled population
- 231 consumers participated through online river sampling to capture those who are digitally enabled but typically less present on panels⁵
- 220 digitally excluded consumers were interviewed face-to-face.
- These totals include 401 boost interviews, comprising of people from ethnic minority backgrounds, as well as prepayment and standard credit customers via online panel and face-to-face interviews⁶. These customers were boosted to increase the sample size to allow for more robust estimates and analysis for these groups. Boost surveys were combined with the main sample and then down-weighted to ensure the overall results remained representative.

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

Notes on statistical significance

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

⁴ Household reference person was used for some targets. This is the member of the household in whose name the accommodation is owned or rented or is otherwise responsible for the accommodation. For further detail please see the technical report: [Energy Consumer Satisfaction Survey Technical Report August-September 2023 \(ofgem.gov.uk\)](#)

⁵ River sampling is an online sampling method that recruits respondents who are not panel members by inviting them to the survey while they are completing another online activity. It allows us to reach people who, for whatever reason, would not join a panel to take surveys regularly. Using this approach helps attract a broader spread of online users.

⁶ An ethnic minority boost was added in wave 18. Both the ethnic minority and payment method boosts were combined to avoid screening out any direct debit customers that would also qualify for the ethnic minority boost, and prepayment meter or standard credit customers who could also count towards the ethnic minority boost. In total, 231/401 boost completes were from ethnic minorities.

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 magnitude carries a maximum confidence interval of $\pm 1.58\%$ at the 95% level of confidence⁷.

⁷ 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?

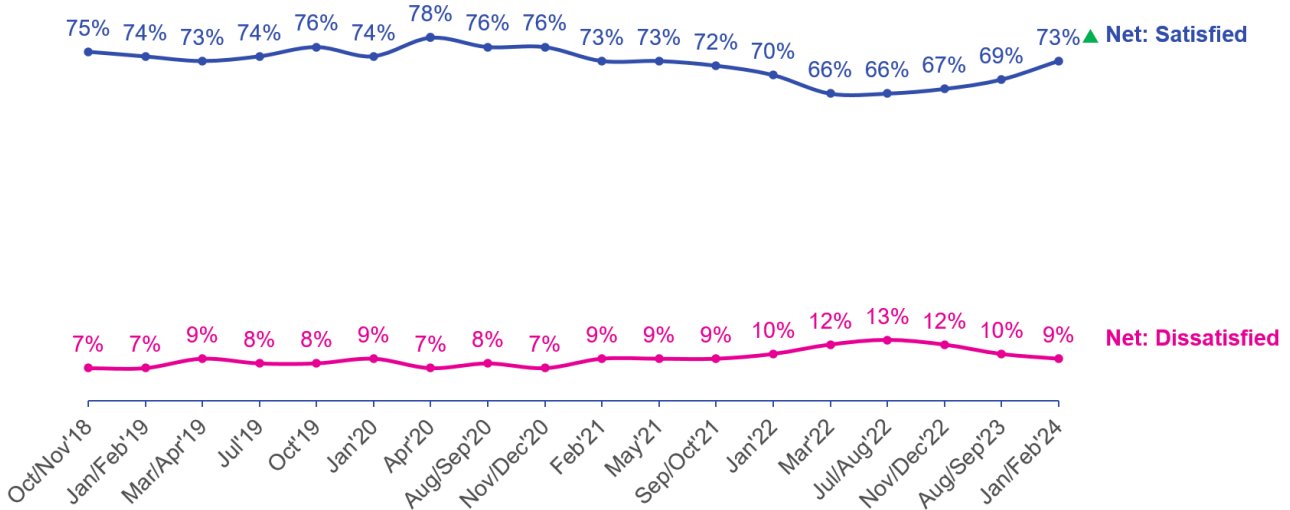
Overview of findings

- **Overall satisfaction has improved, placing it in line with 2021 levels:** satisfaction increased from 69% to 73%, a level last achieved in May 2021, but below the peak of 78% achieved in April 2020.
- **Despite improvements, there remains a notable disparity in satisfaction between those 'doing well' financially and those financially vulnerable:** 82% of those classified as 'doing well' financially were satisfied overall, compared to 67% of those classified as 'vulnerable', and 61% of those classified as 'highly vulnerable' to financial pressures. Nevertheless, there have been increases in satisfaction among those classified as 'vulnerable' (from 61% to 67%) and 'highly vulnerable' (from 51% to 61%), alongside more moderate increases among those classified as 'doing well' (from 78% to 82%).
- **Many remain 'passively satisfied':** while 37% attributed their satisfaction to good customer service and 22% to fair/affordable prices, a notable proportion (25%) expressed satisfaction simply because they had not encountered any problems.
- **Customer service was less commonly cited as a reason for dissatisfaction with overall service:** while three in ten (29%) cited poor customer service in August/September 2023, this fell to 14% in the latest wave, reflecting the discussion of findings on improving satisfaction with customer service.

Overall satisfaction

Overall satisfaction increased from 69% in August/September 2023 to 73% in the latest wave, placing it in line with levels seen in 2021. Levels of dissatisfaction have remained stable, at 9%.

Figure 1: Overall satisfaction with supplier over time



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

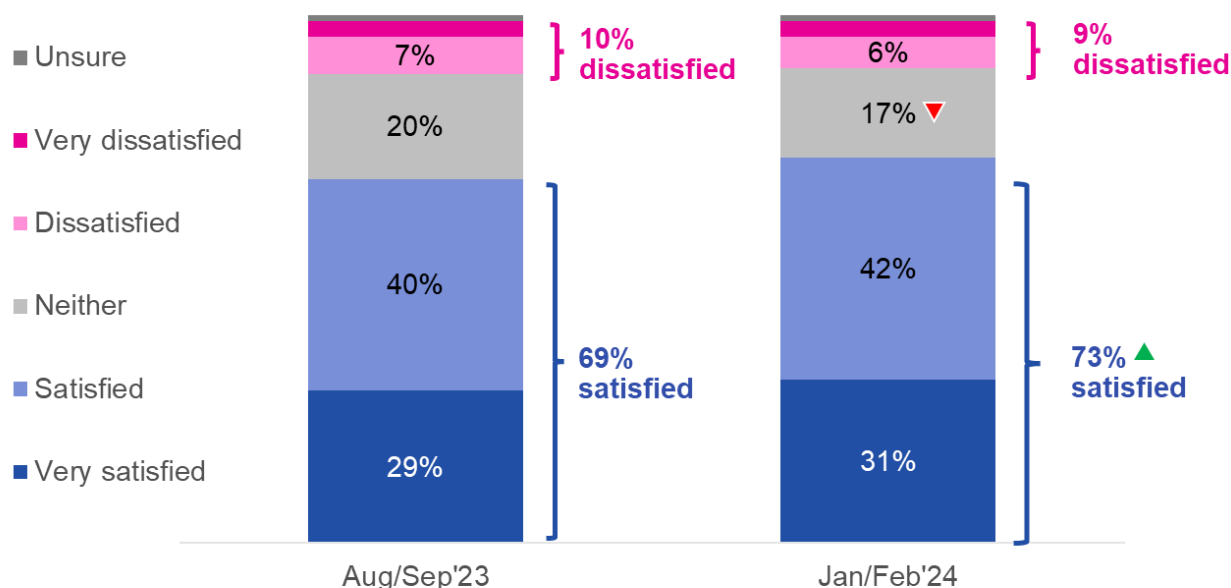
Base: all respondents, January/February 2024 (3,855)

Neither satisfied nor dissatisfied, unsure and prefer not to say are not shown.

In January/February 2024, the increase in overall satisfaction was a result of a decrease in respondents who said they were neither satisfied nor dissatisfied, (17% cf. 20% in August/September 2023), rather than a decrease in levels of dissatisfaction (9% cf. 10% in August/September 2023).

As was the case in the previous wave, most of those classified as satisfied overall were 'satisfied' (42% of total respondents) rather than 'very satisfied' (31% of total respondents).

Figure 2: Overall satisfaction with supplier



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

Base: all respondents, August/September 2023 (3,742), January/February 2024 (3,855)

Data labels not shown for values below 3%

Several groups of consumers were more likely to be satisfied overall with their supplier. The most obvious was the extent to which people were financially comfortable, something explored in more depth later on in this report. Consumers with higher household incomes, particularly those earning above £80,000, reported higher satisfaction (82%) 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 (76% satisfied compared to 64% who had fallen behind/run out of credit for affordability reasons).

Satisfaction is also correlated with a range of demographic factors. For example, consumers aged 65 and above reported higher satisfaction rates than those aged 35-64 (78% compared to 71%). Likewise, homeowners had higher satisfaction than renters (75% compared to 69%). These factors correlate with financial stability, with older homeowners typically more financially stable than younger renters.

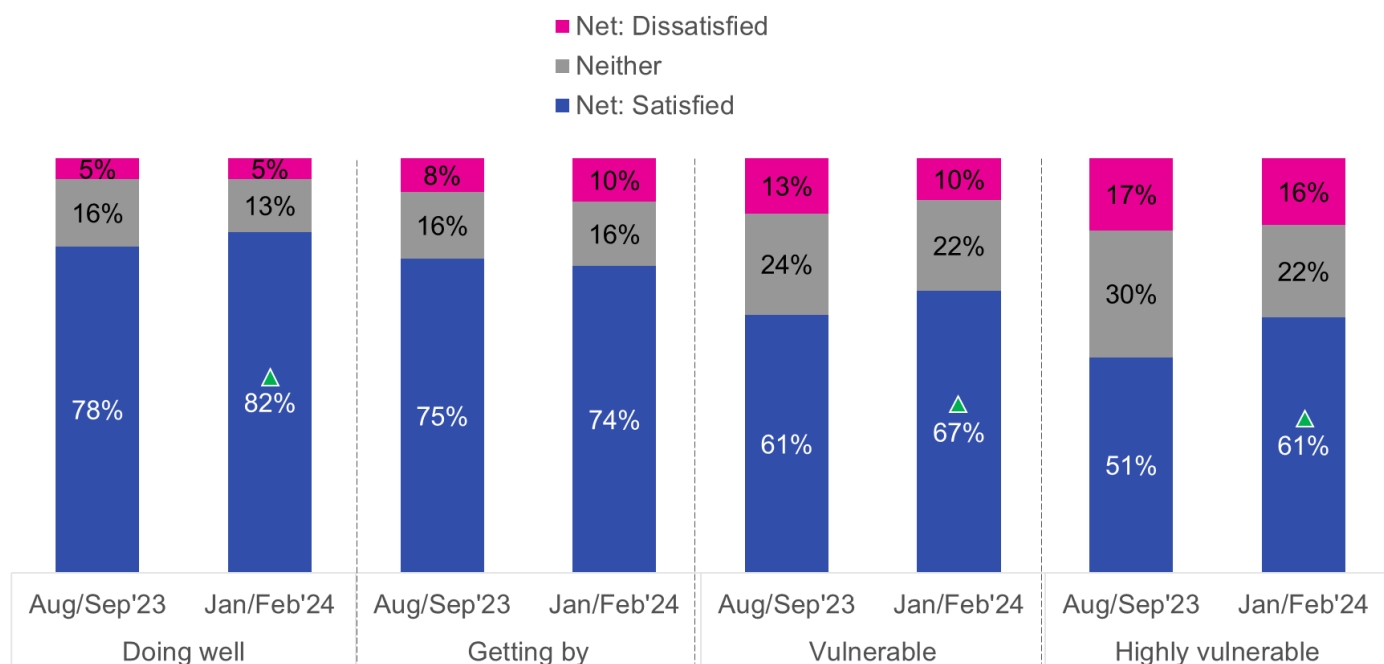
As in August/September 2023, the type of energy tariff and payment method also correlated with satisfaction. Those who think they are on fixed rate tariffs⁸ reported higher satisfaction levels compared to those on variable tariffs (77% on both gas and electricity fixed rate were satisfied cf. 73% and 71% on gas and electricity variable rate). Considering payment type, direct debit payers and prepayment meter payers reported higher satisfaction (76% and 75% satisfied cf. 68% on standard credit).

Additionally, those who have a smart meter (76%) and those who have switched suppliers successfully in the past 12 months (79%) were more satisfied. However, those that have switched successfully and have a smart meter tend to be doing well with the cost of living and are therefore more likely to be satisfied.

There remains considerable variation in satisfaction by the cost of living groupings as defined in the [appendix](#). Whereas around four in five (82%) of those classified as 'doing well' were satisfied, this reduced to 61% of those classified as 'highly vulnerable'. By contrast, 5% of those classified as 'doing well' were dissatisfied, which compares to 16% among those classified as 'highly vulnerable'.

Nevertheless, there have been increases since August/September 2023 in satisfaction among those classified as 'vulnerable' (67% cf. 61%), 'highly vulnerable' (61% cf. 51%) and 'doing well' (82% cf. 78%).

Figure 3: Overall satisfaction by financial vulnerability



A5: Overall, how satisfied or dissatisfied are you with [supplier] as your supplier of <FUEL TYPE>?
 Base: all respondents, doing well (August/September 2023: 1,055; January/February 2024: 1,167), getting by (August/September 2023: 453; January/February 2024: 423), at risk (August/September 2023: 661; January/February 2024: 651), highly vulnerable August/September 2023: 602; January/February 2024: 635).
 Data labels not shown for values below 3%

⁸ Those on fixed rate tariffs tend to have higher satisfaction across the board, such as with understanding of the bill, smart meters and information received. Those on fixed tariffs also over index in direct debits which have higher satisfaction.

Significant differences are shown for summary figures rather than each point of the scale

Reasons for dissatisfaction

Despite improvements, 9% of respondents were dissatisfied with their supplier. When asked to provide their reasons for this, analysis of 100% of the verbatim comments found that close to half (46%) mentioned that prices were too high for them, while one in seven (14%) cited poor customer service.

Unsurprisingly, those in financial difficulty (struggling to keep up with household bills and commitments) were more likely to mention price (56% of those in financial difficulty).

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

“Pricing is not very transparent & communication is appalling. They never respond in a timely manner.”

(Aged 50 - 64, digitally enabled, direct debit)

“Poor customer services, poor problem solving and overall disinterest from them.”

(Aged 65+, digitally excluded, direct debit)

“Very expensive and direct debit is very high.”

(Aged 35 - 49, digitally enabled, direct debit)

Reasons for satisfaction

Among the 69% of respondents who were satisfied, a selection of verbatim comments relating to reasons for satisfaction were coded at random (50% of comments). The key reasons were good customer service (37%), followed by a lack of any issues (25%) and fair/affordable prices (22%). Other reasons mentioned by fewer respondents include good communication (5%), and that their supplier was a good company to deal with (5%).

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

“It’s a good reliable company and their customer service is fantastic.”

(Aged 35 to 49, digitally excluded, prepayment meter)

“They are efficient with their service and make me feel valued as a customer.”

(Aged 35 to 49, digitally enabled, prepayment meter)

“They are standard supplier with fixed costs and have experienced no issues.”

(Aged 35 to 49, digitally enabled, direct debit)

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

Overview of findings

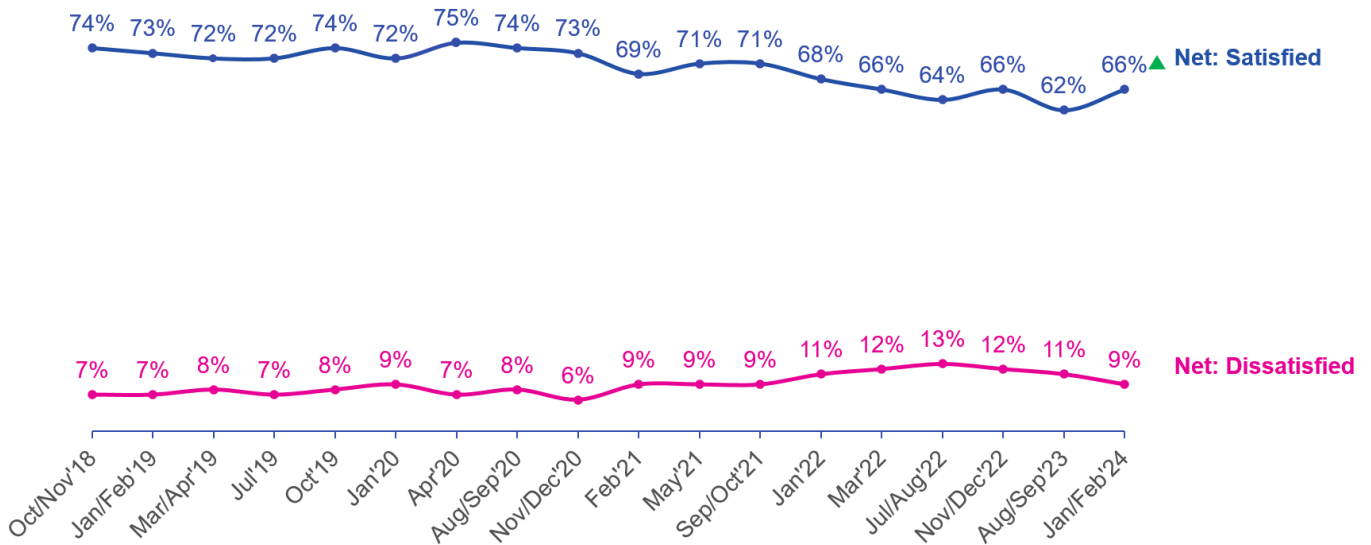
- **Satisfaction with customer service improved:** as with overall satisfaction, satisfaction with customer service has also improved from 62% to 66%, halting its long-term decline since 2021. However, while in line with levels observed in 2022, it remains below the peak in April 2020 (75%) since tracking began.
- **Those more financially vulnerable to the cost of living tended to be less satisfied, although there have been improvements in this respect:** as was the case with overall satisfaction, satisfaction was lower among those classified as 'highly vulnerable' (56% cf. 73% 'doing well'). That said, the increase in overall customer service satisfaction has been driven by improved satisfaction among those classified as 'vulnerable' (63% cf. 56%) and as 'highly vulnerable' (56% cf. 49%).
- **Difficulty getting in contact remains the top reason for dissatisfaction:** among those dissatisfied, the main reason was the supplier being difficult to contact (42%). However, many other factors were mentioned, such as taking a long time to get queries resolved (36%) and their supplier not listening (34%).

Satisfaction with customer service

As with overall satisfaction, satisfaction with customer service has improved from 62% to 66%, halting its long-term decline since 2021. However, while in line with levels observed in 2022, it remains below the peak for this survey recorded in April 2020.

Meanwhile, levels of dissatisfaction have remained stable, at 9%.

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, January/February 2024 (3,855).

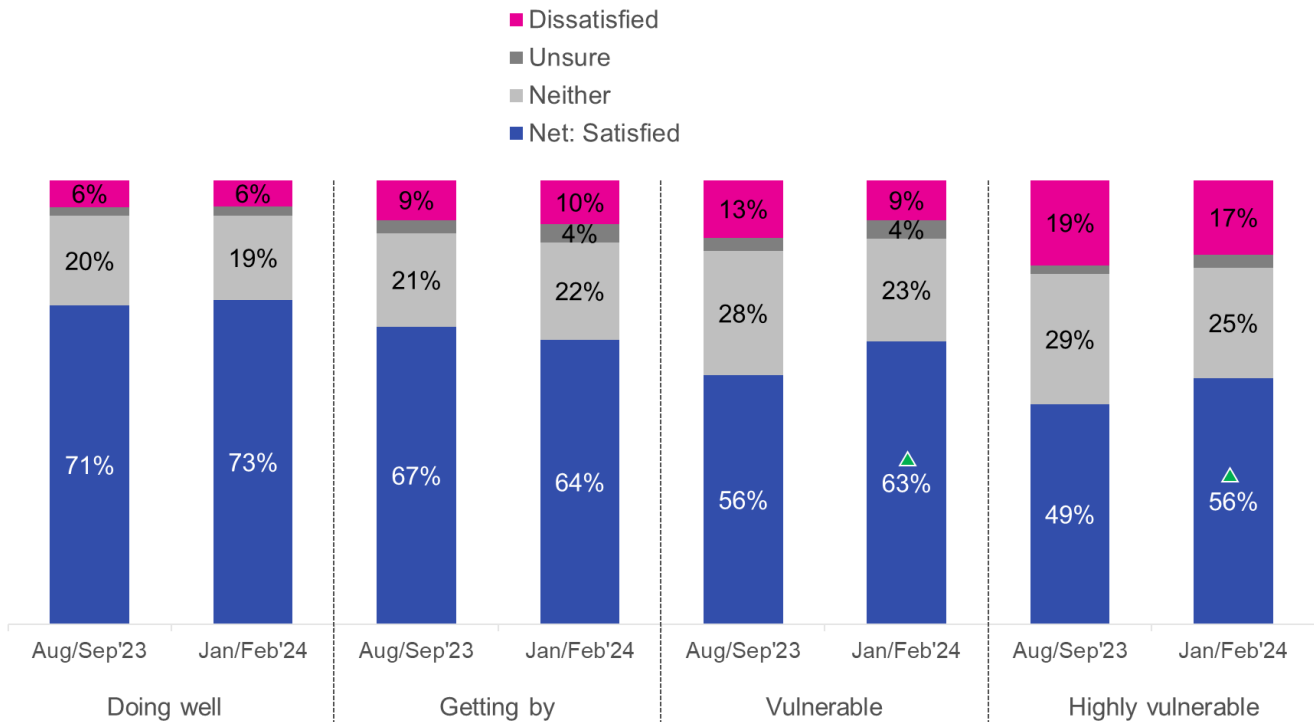
Neither satisfied nor dissatisfied, unsure and prefer not to say are not shown.

As was the case with overall satisfaction, several groups were more or less likely to report satisfaction with the customer service they had received from suppliers. Those aged 18-34 (71% cf. 63% for 35 - 64), homeowners (67% cf. 61% renting social housing) and those with a smart meter (68% cf. 61% without a smart meter) were more likely to be satisfied.

As in August/September 2023, a strong correlation between satisfaction and the cost of living groupings is also 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 (73% compared to 56%). Those classified as 'highly financially vulnerable' were significantly more likely to be dissatisfied with the customer service received from their supplier in comparison to those classified as 'doing well', 'getting by' and 'vulnerable' (17% cf. 6%, 10% and 9%).

However, it is encouraging that the increase in overall satisfaction has coincided with improved satisfaction among those classified as 'vulnerable' (63% cf. 56%) and as 'highly vulnerable' (56% cf. 49%), similarly to overall satisfaction. As we explore below, this may be in part explained by easing cost of living pressures.

Figure 5: Satisfaction with customer service by financial vulnerability



A7: Overall, how satisfied or dissatisfied are you with the customer service you have received from [supplier]?
 Base: all respondents, doing well (August/September 2023: 1,055; January/February 2024: 1,167), getting by (August/September 2023: 453; January/February 2024: 423), at risk (August/September 2023: 661; January/February 2024: 651), highly vulnerable August/September 2023: 602; January/February 2024: 635).

There is evidence in the survey that while many are still struggling, cost of living pressures are starting to ease and some consumers are feeling less burdened by financial pressures. This aligns with the broader trend of declining UK inflation rates and stabilising energy prices. For example, more consumers this wave told us they were coping with household bills and credit commitments (36% cf. 31%), while the proportion saying they were struggling has dropped (51% cf. 55%).

Meanwhile, data from the January 2024 wave of the [Consumer Impacts of Market Conditions Survey](#) revealed a decline in the impact of rising energy costs on households since July 2023, with a reduction in those incurring more debt (9% cf. 12%), struggling with paying other household costs (17% cf. 24%) or trimming essential spending (26% cf. 33%).

It is important to note that other Ofgem data indicates that the total pound value of debt and arrears continues to rise, however the combined number of customers in debt or arrears dropped slightly in Q1 2024. This shows that the average value of debt or arrears is increasing⁹.

The easing of financial pressures has likely indirectly contributed to the increased satisfaction with energy suppliers, as people may feel slightly less burdened by their energy bills. As we explore later, it appears to have less to do with suppliers offering better support for those struggling financially – fewer

⁹ Debt and Arrears Indicators | Ofgem

have been contacted by their suppliers about bill support, and satisfaction with the support offered is stable.

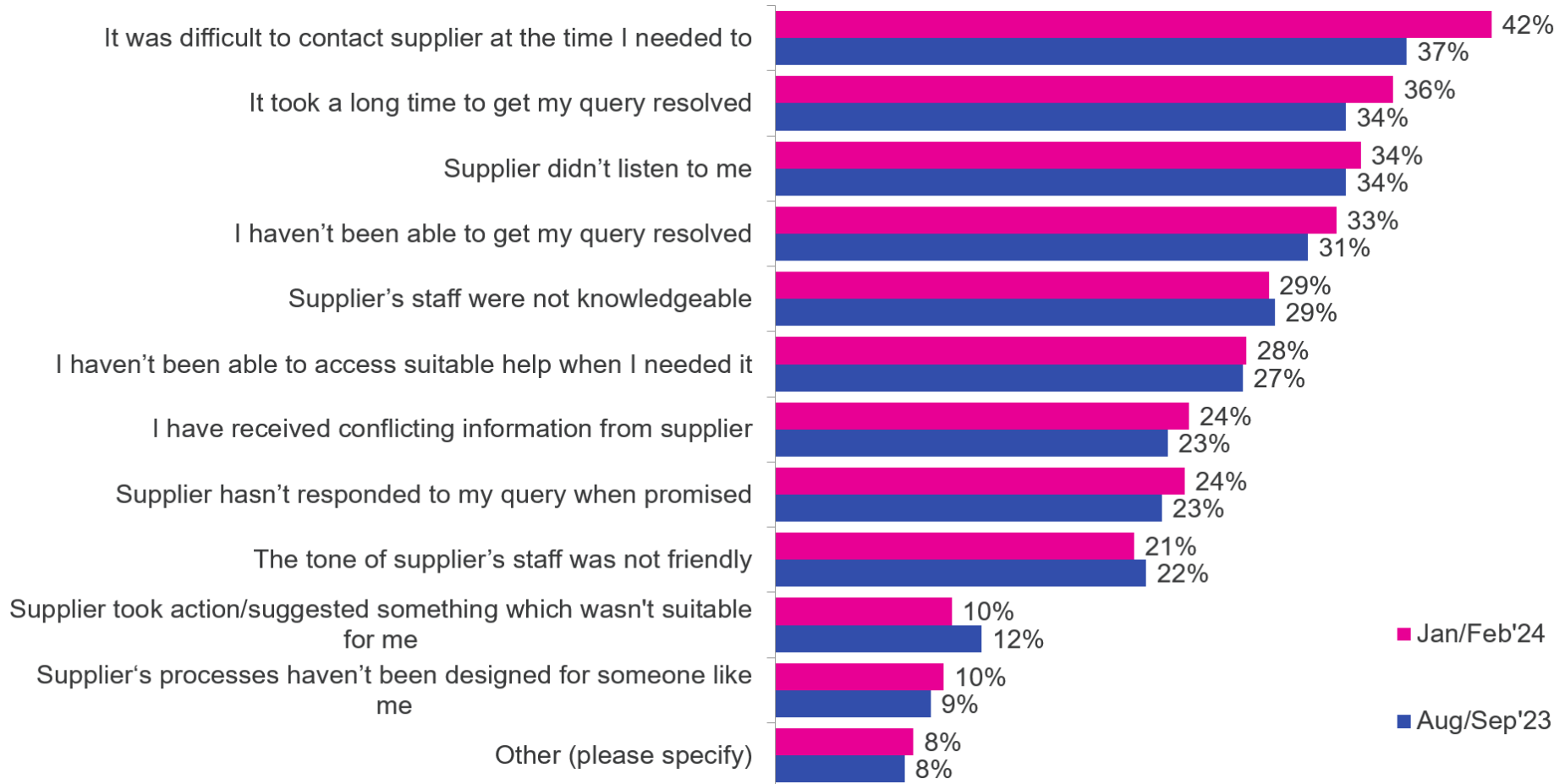
However, as we set out elsewhere, other metrics, such as billing accuracy and ease of understanding, have improved (a key driver of customer service satisfaction), meaning that supplier performance is also likely to have contributed to increased satisfaction too.

Reasons for dissatisfaction with customer service

As in August/September 2023, the top three reasons cited for customer service dissatisfaction were that it was difficult to contact at the time respondents needed (42%), taking a long time to get the query resolved (36%) and not feeling listened to (34%). A lack of resolution (33%) and lack of staff knowledge (29%), as well as an inability to access suitable help/information (28%) were also cited as reasons for dissatisfaction with customer service.

Around a quarter mentioned receiving conflicting information (24%), a lack of response (24%) and the unfriendly tone of staff (21%). Figure 6 shows the full range of responses. Those with a long-term illness, physical or mental health problem or disability (12% cf. 8% no disability) and on the PSR (11% cf. 8% not on the PSR) were more likely to be dissatisfied. In this survey wave we conducted an ethnic minority boost to allow for more analysis between groups, but no significant differences were found between ethnic minority groups for dissatisfaction with customer service.

Figure 6: 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); January/February 2024 (372)

Key drivers of customer service

An important consideration when analysing consumer satisfaction data is what factors are 'driving' the change. In other words, what variables in the survey – all else being equal – exert the biggest independent effect on how satisfied consumers are with their suppliers. To explore this, we ran a key driver analysis to identify which variables are the strongest predictors of a consumer's satisfaction with their overall customer service experience.

In total, we built two regression models to understand which variables drive satisfaction with customer service. The regression models combine the August/September 2023 and January/February 2024 data.

1. The first was the demographic factors and energy characteristics model. This included a series of demographic factors such as age, gender, and our cost-of-living classification, alongside energy characteristics such as fuel type, payment type, and individual suppliers.
2. The second model combined demographic factors and energy characteristics with supplier performance measures which included a series of more specific performance measures, such as satisfaction with information received, satisfaction with billing ease and accuracy, and satisfaction with support received. More detail on these models can be found in the appendix.

The results reported below refer to relative importance scores. A relative importance score reflects how much each predictor or independent variable contributes to the overall explanatory power of the model. In other words, how impactful each variable is in contributing to satisfaction. A score of 50%, for example, would mean that the variable in question is responsible for 50% of the model's overall explanatory power.

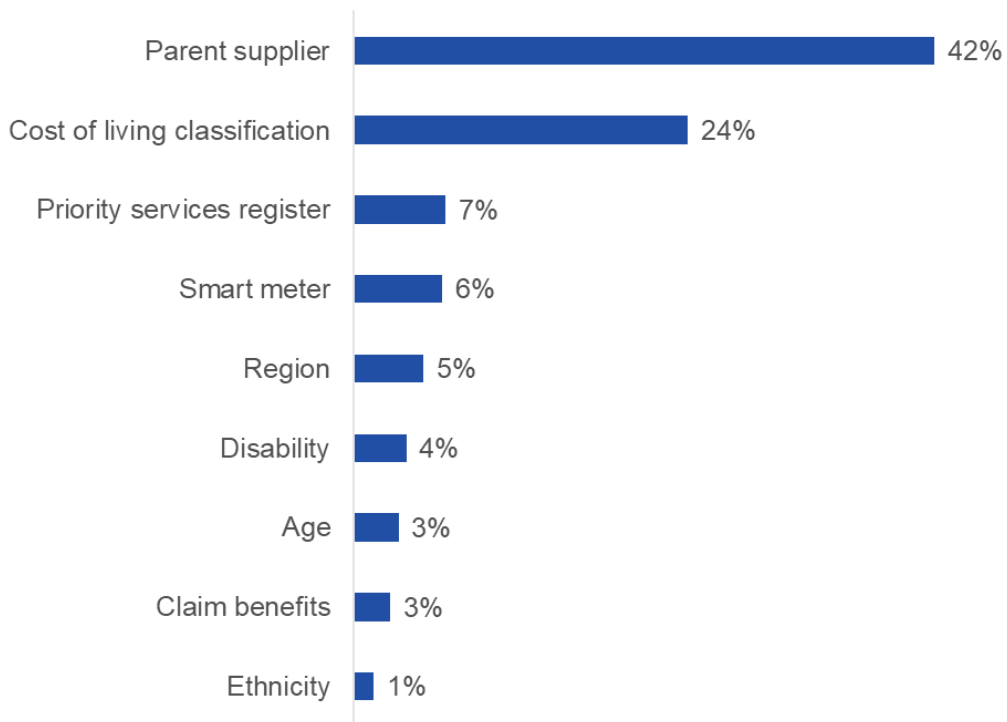
Demographic and energy characteristics model

Starting with the demographic and energy characteristics model, the parent supplier¹⁰ came out as the strongest predictor for consumer satisfaction with customer service, accounting for 42% of the variance explained by the model, by some distance ahead of any other single variable (when supplier performance measures are not accounted for).

This underscores the significance of the supplier's role in driving satisfaction with customer service. In other words, even at times where energy prices are high, the service offered by suppliers still matters when it comes consumers' customer service satisfaction.

¹⁰ Parent supplier is the company that owns the individual energy supplier

Figure 7: Relative importance scores for demographic and energy characteristics only (top 10)



Relative importance scores for regression models for regression on A7: Overall, how satisfied or dissatisfied are you with the customer service you have received from <A3/A4 SUPPLIER>?. Base: August/September 2023 (3742); January/February 2024 (3855)

The cost of living was also a large driver of satisfaction with customer service, accounting for 24% of the model. With all else being equal, the more financially vulnerable a customer is, the less likely they are to be satisfied with their supplier. This supports our earlier analysis suggesting that the easing of cost of living pressures has likely contributed to rising satisfaction levels.

Other factors in the model, such as ethnicity and payment type mattered much less, meaning they didn't have a big impact on satisfaction, once you control for other factors.

Demographic, energy characteristics and supplier performance model

Specific supplier performance metrics were added to the energy and demographic model above, to see which specific performance measures were the biggest drivers of broader customer service satisfaction.

The two performance measures that came out as most associated with higher satisfaction were satisfaction with information received from supplier and satisfaction with billing¹¹.

Satisfaction with information accounted for 33% of the model. This question asks respondents about satisfaction with information received very broadly, as 'information' is left undefined in the survey and is therefore open to interpretation. As such, it is harder to draw conclusions about what information customers are referring to, making the variable less useful for interpretation.

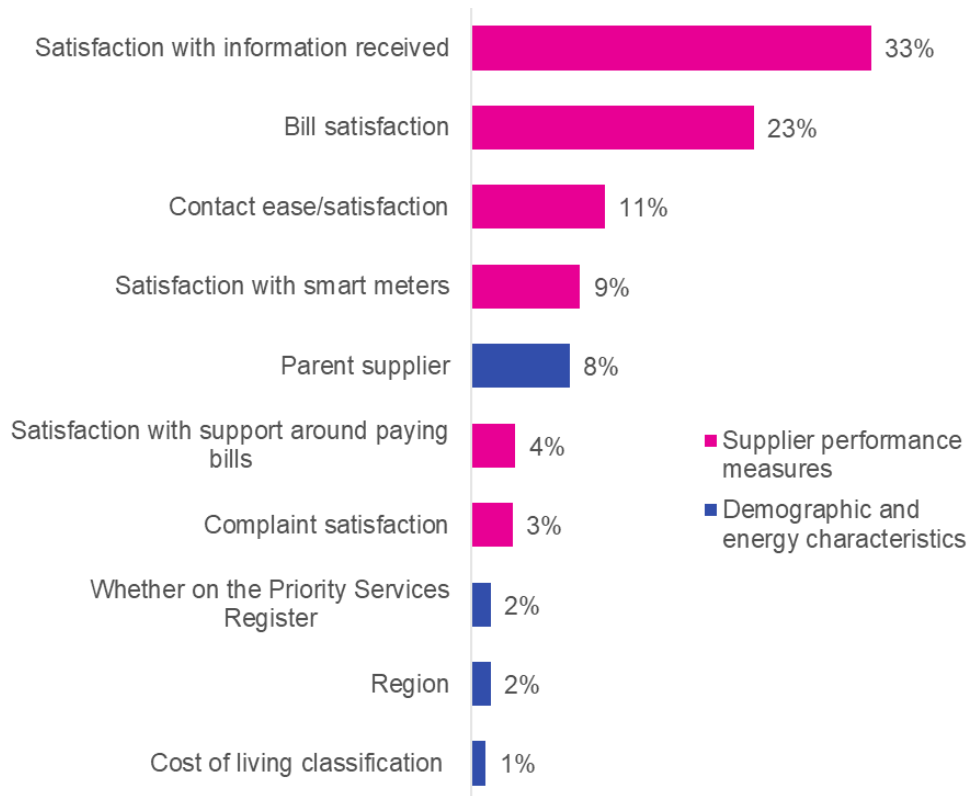
¹¹ Due to a scripting error in January/February 2024, only those with electricity and gas were asked their satisfaction with billing. August/September was not impacted. For more detail on this error, see the billing section.

Satisfaction with billing (ease of understanding and accuracy) accounted for 23% of the model, emphasising the importance of getting bills right for customers. Meanwhile, contact ease/satisfaction accounted for 11% of the model, with satisfaction with smart meters not far behind (9%).

Notably, even once specific performance measures are added, parent supplier still maintains a relative importance score of 8%. This indicates that there may be additional facets of supplier performance that are not accounted for by the series of performance measures that are added to the model.

BMG, Ofgem and Citizens Advice plan to explore and potentially incorporate extra dimensions in future research.

Figure 8: Relative importance scores combining supplier performance measures with energy and demographic measures (top 10)



Relative importance scores for regression models for regression on A7: Overall, how satisfied or dissatisfied are you with the customer service you have received from <A3/A4 SUPPLIER>? Base: August/September 2023 (3742); January/February 2024 (3855)

Views on billing

Overview of findings

- **Satisfaction with bill accuracy and ease of understanding improved:** satisfaction with ease of understanding the bill and bill accuracy have improved from 71% to 78% and from 70% to 74% respectively since August/September 2023. Satisfaction with the ease of understanding is at its highest level since the tracker began in 2018, and satisfaction with bill accuracy has only previously been exceeded in November/December 2020 (77%). These uplifts were driven by improvements among those consumers classified as 'vulnerable' and 'highly vulnerable' financially.

It should be noted that satisfaction with ease of understanding the bill and accuracy of the bill was only asked to those with both gas and electricity in the January/February 2024 wave due to a scripting error.¹² While trends remain reliable, interpret them with additional caution.

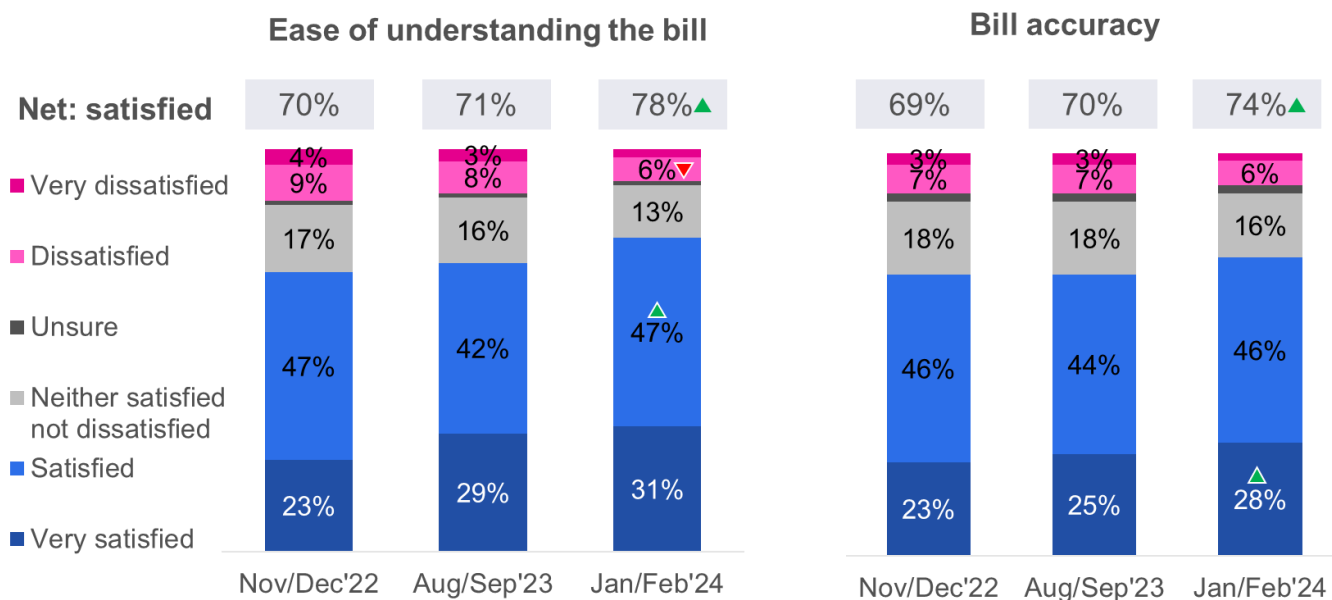
- **Dissatisfaction continues to stem from difficulty linking bill figures to actual energy usage:** the top reasons for dissatisfaction with both ease of understanding and bill accuracy were difficulty understanding how the numbers on the bill relate to energy usage (50% and 36%) and how much energy has been used (43% and 35%)
- **3 in 10 report having experienced unexpectedly high bills:** 30% had experienced an unexpectedly high bill in the last 3 months, lower than the 33% who had done so in August/September 2023. The main reason for this was using more energy than they thought (11%), with some also saying they did not know the reason (6%).

¹² In January/February 2024, billing satisfaction with ease of understanding the bill and accuracy of the bill was only asked to those with both gas and electricity due to a scripting error. This meant 15% of those eligible to answer this question were not asked any questions from the billing section. However, we are still confident in the trend for billing as we have seen a similar uplift in just electricity and gas customers since August/September 2023 and those that only have electricity have very similar views to those with gas and electricity. On this basis, we have continued to trend the results, but interpreting results should be done with a degree of caution.

Satisfaction with bill accuracy and ease of understanding

Satisfaction with ease of understanding the bill and bill accuracy have improved from 71% to 78% and from 70% to 74% respectively.

Figure 9: 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, November/December 2022 (2,621);

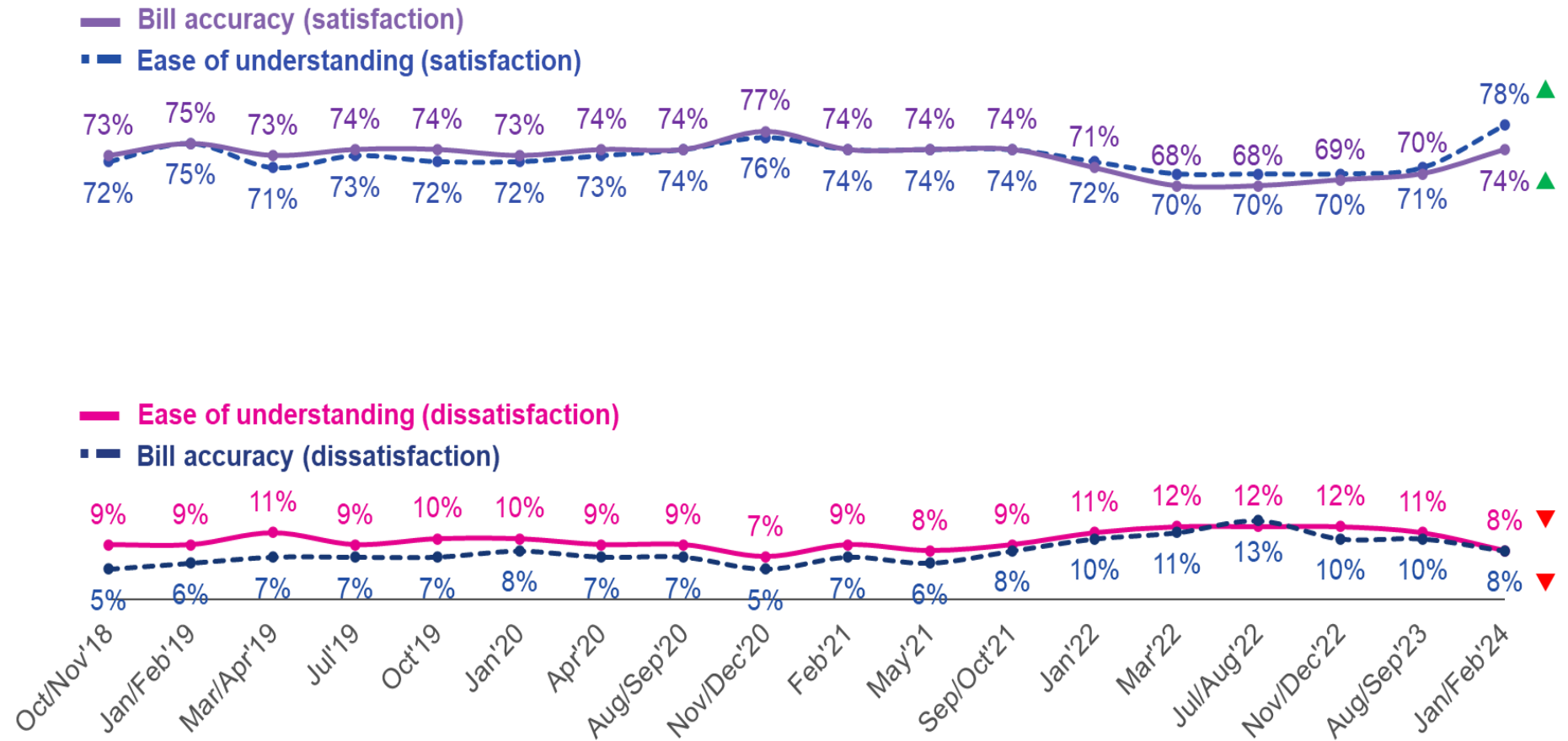
August/September 2023 (2,953); January/February 2024 (2,831)

Data labels not shown for values below 3%

Note in January/February 2024, satisfaction with ease of understanding the bill and bill accuracy was only asked to those with both gas and electricity so interpreting the results should be done with a degree of caution. For more information on this error see the billing section.

Increased satisfaction in the ease of understanding the bill metric places it at its highest level (78%) since the tracker began in 2018. Satisfaction with bill accuracy (74%) is at its joint second highest peak, only exceeded in November/December 2020 (77%). Levels of dissatisfaction declined to 8% for both measures, largely in line with the lowest levels of dissatisfaction observed since the tracker began in 2018.

Figure 10: 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, January/February 2024 (2,831). Note in January/February 2024, satisfaction with ease of understanding the bill and bill accuracy was only asked to those with both gas and electricity so interpreting the results should be done with a degree of caution. For more information on this error see the billing section.

As was the case in August/September 2023, several consumer characteristics correlate with consumer satisfaction relating to the ease of understanding the bill and the accuracy of bills. These include digital inclusion, keeping up with bills, age, and payment method.

In contrast to August/September 2023, where individuals who were digitally excluded were less satisfied with both the ease of understanding bills and accuracy than those who were digitally enabled, there was greater parity in the latest wave. While those digitally excluded remained less satisfied than those who were digitally enabled when it comes to ease of understanding (72% cf. 79%), they were equally satisfied with bill accuracy (72% cf. 75%).

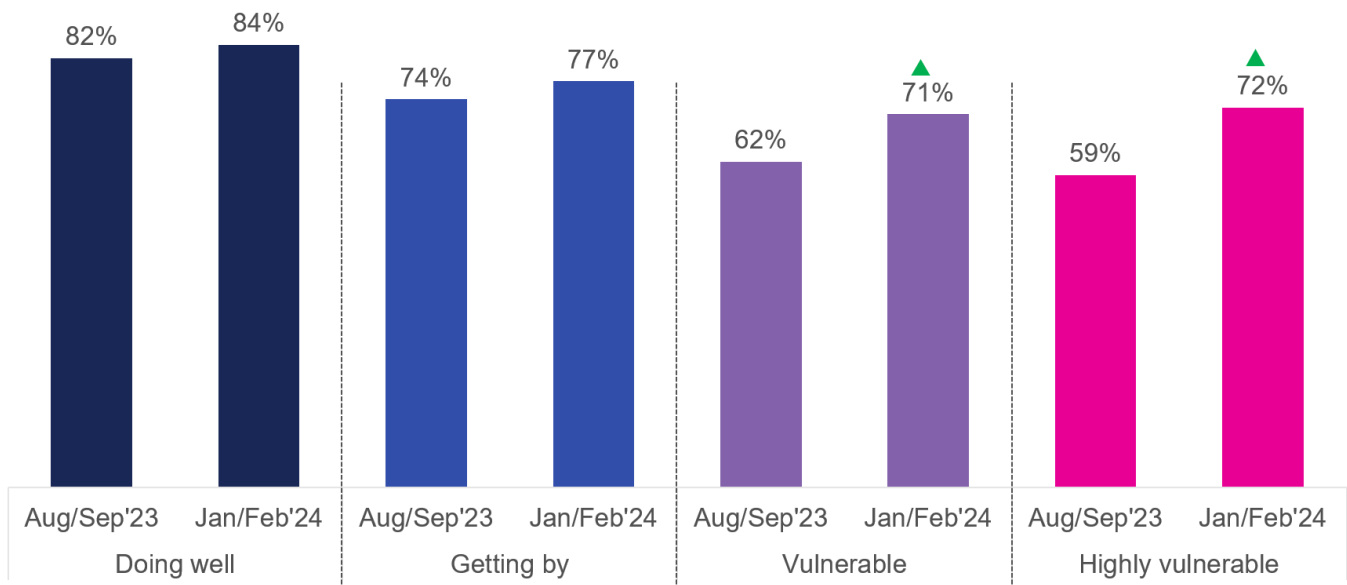
As is the case across a number of satisfaction metrics, satisfaction varied by factors related to financial circumstance. For example, respondents who had reported falling behind or running out of credit due to affordability issues reported lower satisfaction rates: 71% for understanding bills and 62% for their accuracy, which compares to 79% and 76% respectively among those who had not fallen behind for affordability reasons.

There was also varying satisfaction by payment method, with those paying by standard credit feeling less satisfied (74% for bill understanding and 69% for accuracy) than those paying for direct debit payments (78% and 75%, respectively). No significant changes were seen compared to prepayment meter customers. Moreover, having a smart meter is linked to higher satisfaction regarding bill accuracy, with 76% of smart meter owners saying they were satisfied compared to 72% of those without.

In terms of cost of living groupings, as was the case with customer service, there have been improvements in satisfaction with ease of understanding bills among those 'vulnerable' (from 62% to 71%) and those 'highly vulnerable' (from 59% to 72%) to the cost of living. The same pattern was evident in relation to bill accuracy.

It should be noted that these increases may be partly a result of consumers adjusting to higher prices rather than the accuracy and layout of bills.

Figure 11: Satisfaction with ease of understanding of bill by financial vulnerability



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, doing well (August/September 2023: 940; January/February 2024: 960), getting by (August/September 2023: 387; January/February 2024: 323), at risk (August/September 2023:467; January/February 2024: 460), highly vulnerable August/September 2023: 414; January/February 2024: 398). Note in January/February 2024, satisfaction with ease of understanding the bill and bill accuracy was only asked to those with both gas and electricity so interpreting the results should be done with a degree of caution. For more information on this error see the billing section

Reasons for dissatisfaction with ease of understanding of bills

Half (50%) 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 (43%), or difficult to understand how the total cost has been calculated (41%). There has been an increase from 11% to 18% in the proportion mentioning that the information they need is difficult to find.

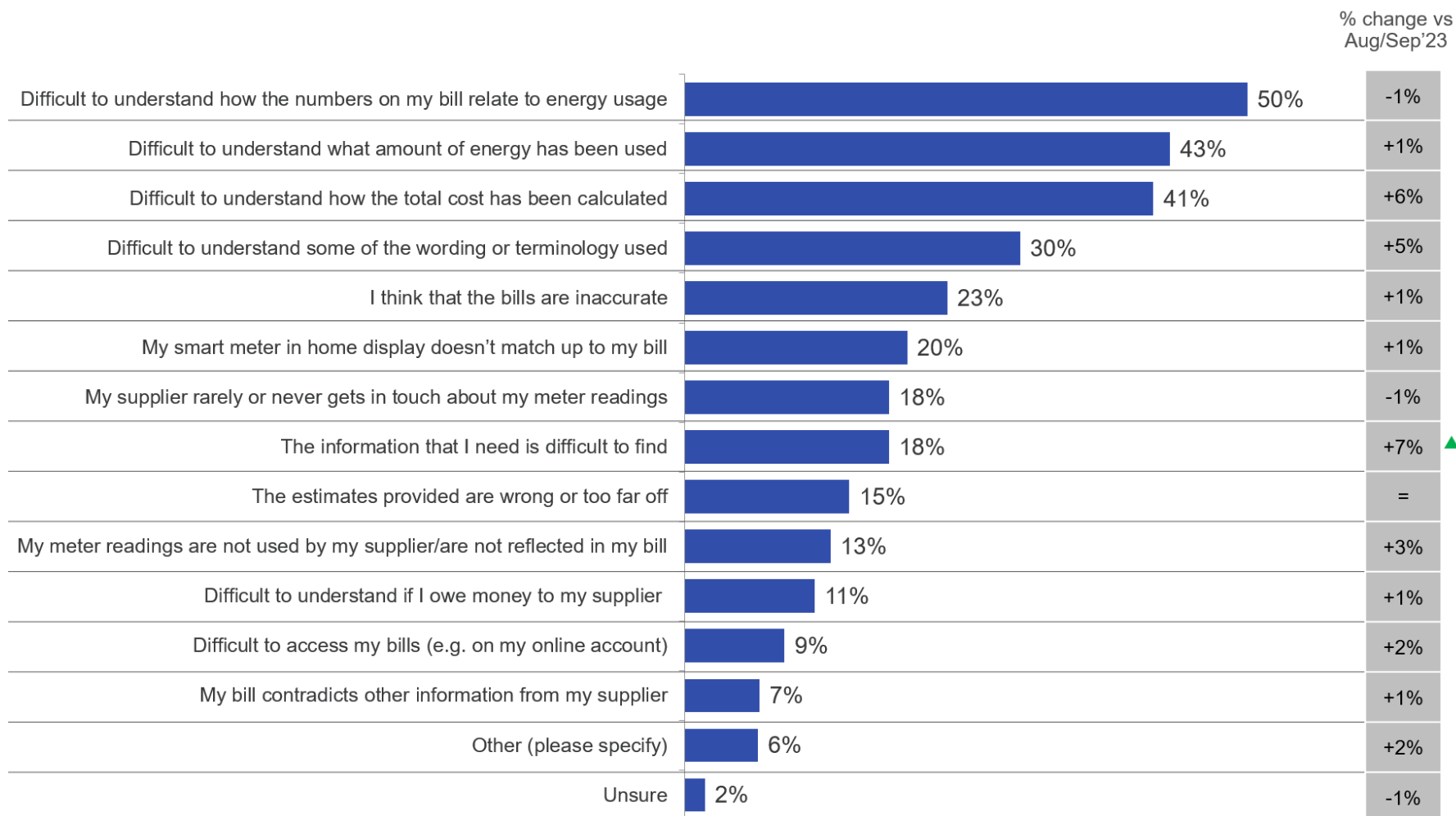
The full range of responses is presented in Figure 12.

Reasons for dissatisfaction with bill accuracy

Around a third of those dissatisfied with the accuracy of the bill said it was difficult to understand how the numbers relate to energy usage (36%), that it was difficult to understand the amount of energy used (35%), that they believed the bills are inaccurate (34%) and that it is difficult to understand how the total cost has been calculated (34%).

The full range of responses is presented in Figure 13.

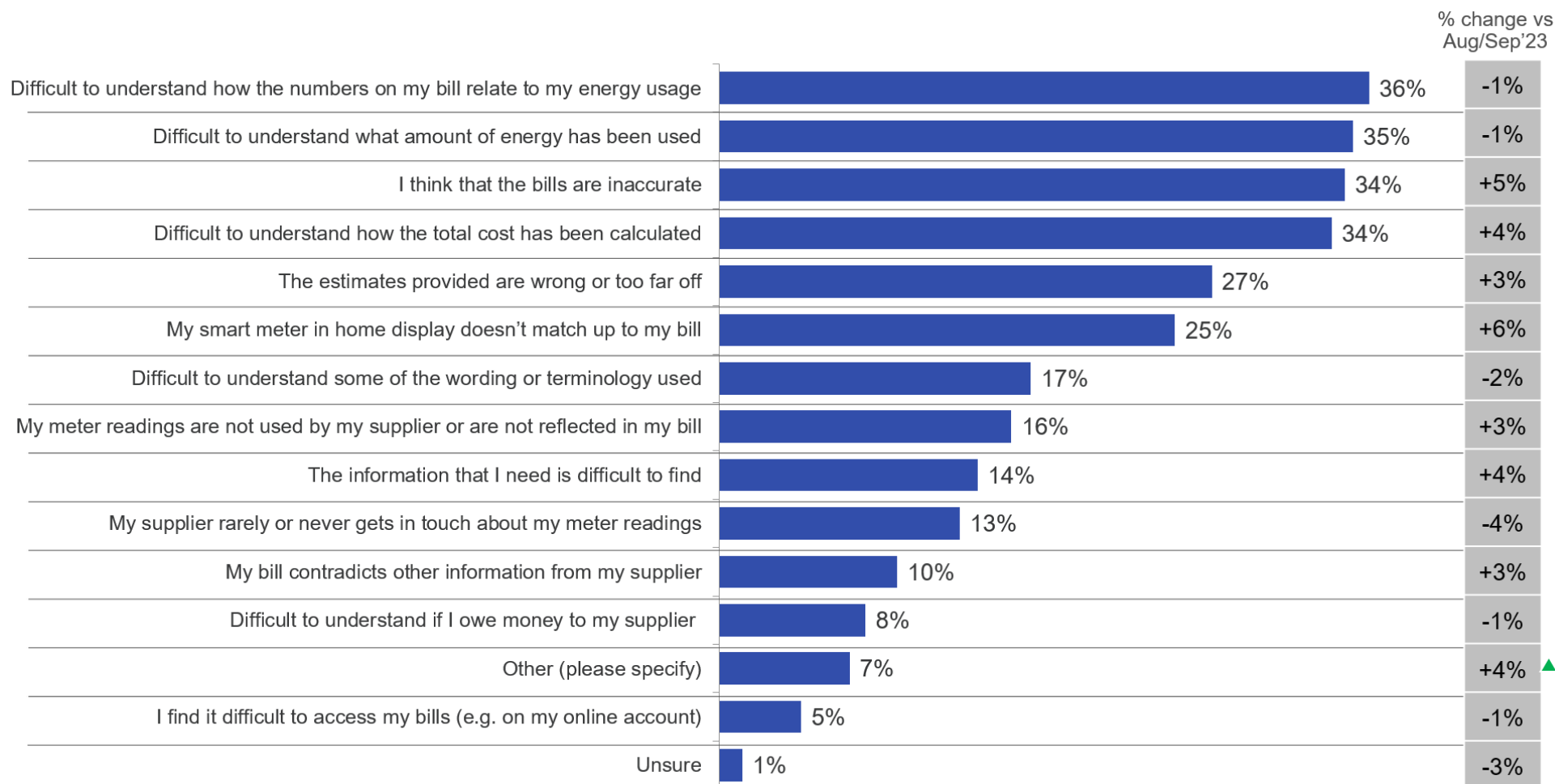
Figure 12: Reasons for dissatisfaction with ease of understanding of bills



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

Base: dissatisfied with ease of understanding, January/February 2024 (230). Note in January/February 2024, satisfaction with ease of understanding the bill and bill accuracy was only asked to those with both gas and electricity so interpreting the results should be done with a degree of caution. For more information on this error see the billing section.

Figure 13: 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, January/February 2024 (249). Note in January/February 2024, satisfaction with ease of understanding the bill and bill accuracy was only asked to those with both gas and electricity so interpreting the results should be done with a degree of caution. For more information on this error see the billing section

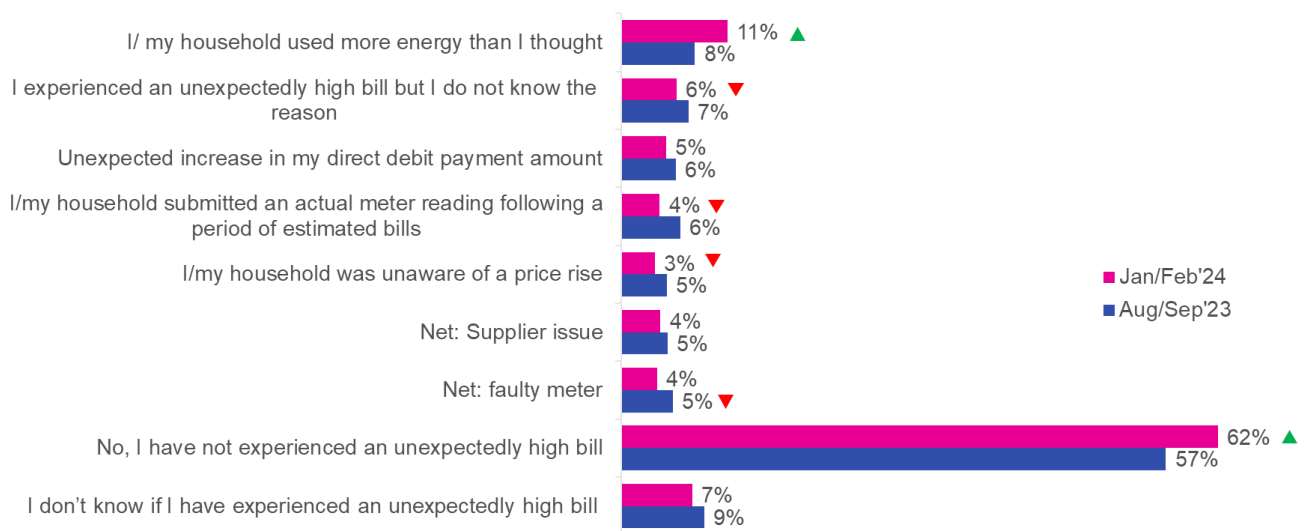
Experience of unexpectedly high bills in the last three months

Corresponding with the increases in billing satisfaction, there has been a reduction in the proportion of respondents who reported receiving an unexpectedly high bill in the last three months from 33% to 30% (a period ranging from October 2023 to February 2024, depending on when they took the survey), which reflects the upturn in satisfaction with bill accuracy.

Unsurprisingly, examining differences by subgroup, the strongest correlation was for variables linked to financial circumstances. For example, those who had fallen behind on energy bills/run out of credit for affordability reasons were much more likely to report they had experienced unexpectedly high bills than those who had not (62% compared to 23%). Likewise, consumers classified as highly vulnerable to the cost of living also disproportionately reported this experience (48% of those classified as highly vulnerable compared to 21% classified as doing well).

The main reason cited by consumers who said they had experienced an unexpectedly high bill was that they had used more energy than they thought (11%). This was an increase on the 8% that cited it in August/September 2023.

Figure 14: 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); January/February 2024 (3,855)

Contacting suppliers

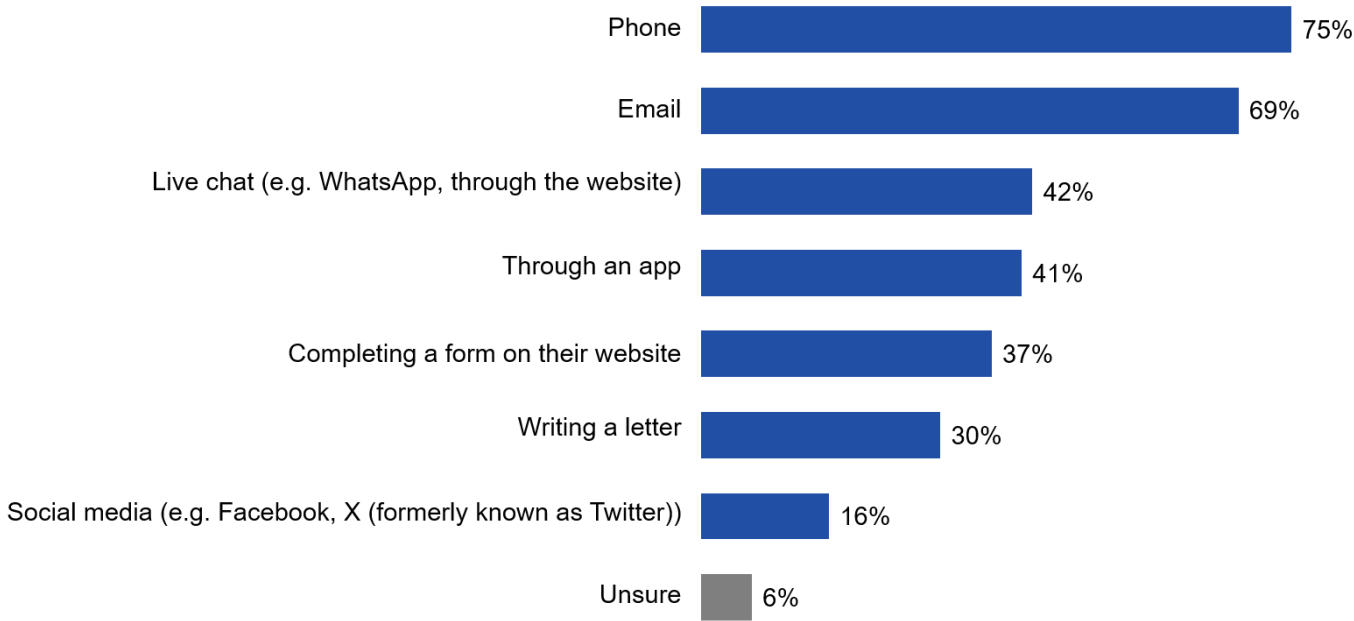
Overview of findings

- **Views on the range of contact methods available were largely positive:** 68% were satisfied with the range of methods available to contact their supplier, and 71% agreed that the contact methods available met their needs.
- **Consistent contact rates:** almost one in three (32%) had contacted their supplier in the last 3 months, in line with previous waves. For those getting in contact, the most common reasons were to give a meter reading (18%), to query bills received (18%) or a smart meter query (15%).
- **Ease of contacting supplier improved:** the proportion rating it as easy to contact their supplier increased from 60% to 65%, the highest level since September/October 2021, with the proportion finding it difficult decreasing from 23% to 19%. However, the proportion rating it as easy has not matched peak levels achieved in October 2019 (73%). The proportion who said they had tried to contact their supplier but had been unable to get through (4%) continued a downward trend, from 8% in November/December 2022, and 6% in August/September 2023.
- **Satisfaction with elements of contact increased further, and fewer experienced issues:** following significant increases in August/September 2023, satisfaction with various elements of the contact – such as the service received through social media (87%) and the service received via email (74%) – increased further. While 54% reported experiencing difficulties with their most recent contact, this represents a downturn on the 63% who did so in August/September 2023. Long wait times remained the most prevalent issue among those who contacted or tried to contact their supplier (25%).
- **One in seven queries remain unresolved:** around one in seven (15%) who had made contact said their query was not resolved, in line with August/September 2023, with a further 21% saying their query was partially resolved and over half (57%) saying the query was fully resolved. Queries regarding complaints (28%), smart meters (27%) and bills (22%) were more likely than average to be reported as unresolved, as were enquiries about products or services (22%).

Awareness of suppliers' contact methods

For the first time this wave, respondents were asked which contact methods they were aware their supplier offers. Three quarters (75%) selected phone, seven in ten (69%) email, and around two in five mentioned live chat (42%), an app (41%) and website forms (37%).

Figure 15: Awareness of suppliers' contact methods



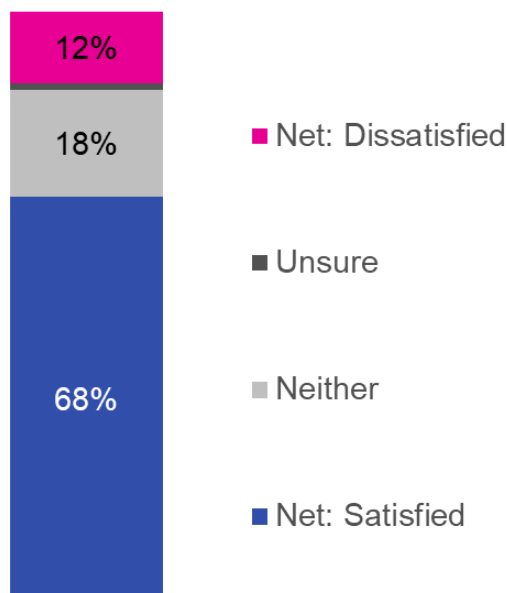
*E15: As far as you are aware, which of the following contact methods does [Supplier] offer?
Base: all respondents (3,855)*

Satisfaction with range of contact methods available

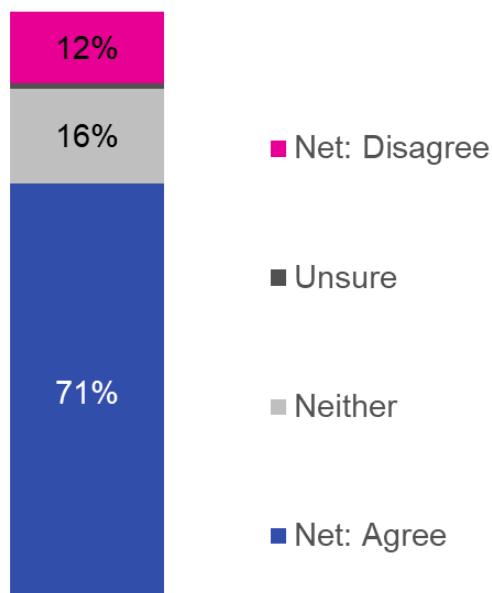
Respondents were also asked about the extent to which they are satisfied with the range of methods available to contact their supplier for the first time in this wave. Around seven in ten were satisfied with the range of methods available to contact their supplier (68%) and a similar proportion agreed that they met their needs (71%).

Figure 16: Satisfaction with range of contact methods available

Satisfaction with range of methods available to contact supplier



Agreement that contact methods available met the customer's needs



E16. To what extent are you satisfied or dissatisfied with the range of methods available to contact [Supplier]?

E17. To what extent do you agree that the contact methods offered meet your needs?

Base: all who contacted or tried to contact, January/February 2024 (1,456)

Those classified as 'vulnerable' and 'highly vulnerable' to the cost of living pressures were less likely to be satisfied with the range of contact methods available than those classified as 'doing well' (58% and 60% cf. 80%), and less likely to agree that they met their needs (59% and 62% cf. 83%).

Contact with suppliers

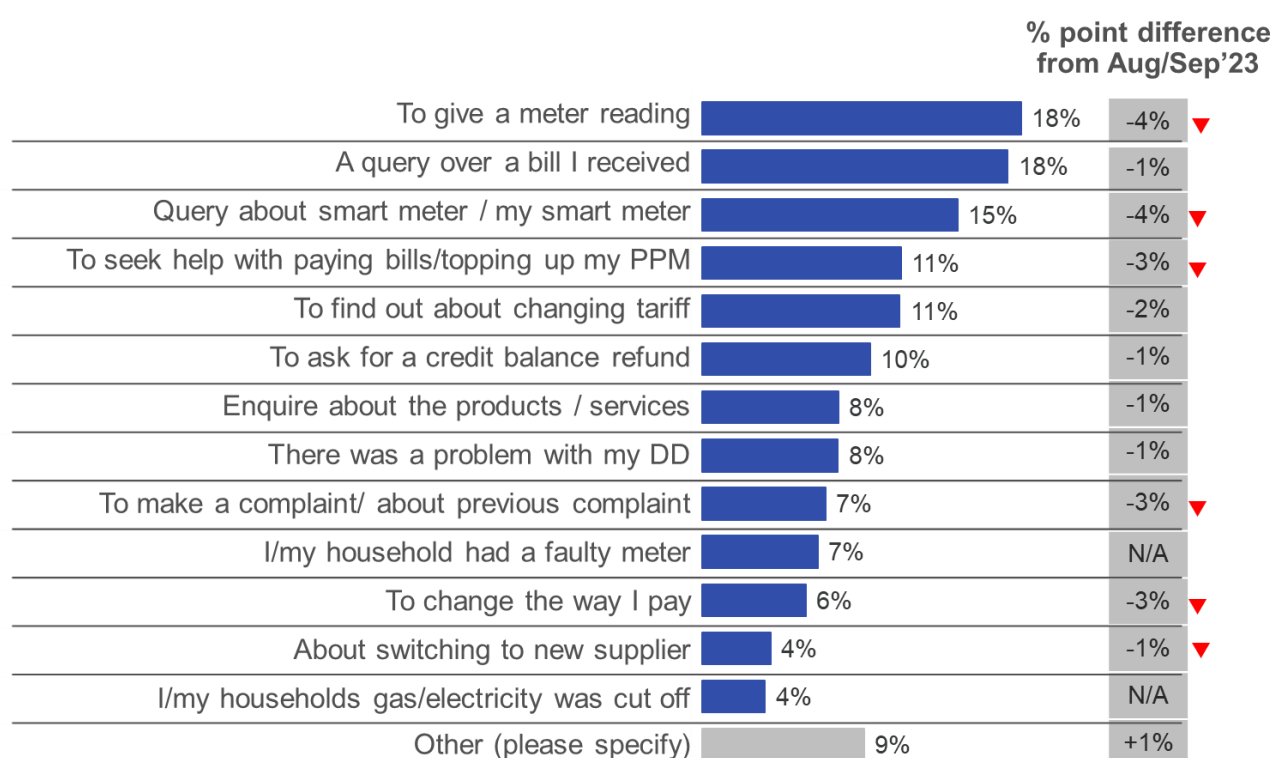
As was the case in August/September 2023, around one in three (32%) reported contacting their supplier in the last three months. A further 4% said they had tried to contact their supplier but had been unable to get through, continuing a decline on the 8% who had done so in November/December 2022, and the 6% who had done so in August/September 2023.

Those who were in more vulnerable circumstances, for example those that had fallen behind/run out of credit for affordability issues¹³ (67%), those on the PSR (51%) or those classed as highly financially vulnerable (46%), were more likely to report that they contacted or tried to contact their supplier. Consumers with a long-term illness, physical or mental health problem or disability (43%) were also more likely to have contacted or tried to contact their supplier.

Reasons for contact with suppliers

Among those who contacted their supplier, the main reasons for doing so were to give a meter reading (18%), to query a bill (18%) and a query about a smart meter (15%).

Figure 17: 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); January/February 2024 (1,456)

¹³ Fallen behind/run out of credit for affordability reasons include those vulnerable 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.

Method of contact with suppliers

Payment queries were more likely than average to be made via social media (70%), letter (64%) and live chat (60%). A third (36%) of those contacting via letter did so with a query about their smart meter (cf. average of 15%), and around three in ten contacting via a form on the website (32%) or an app (28%) did so to give a meter reading (cf. average of 18%).

The full range of responses by method of contact is shown in Figure 18.

Figure 18: 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	18%	16%	14%	21%	20%	24%	32% ▲	28% ▲
A query over a bill I received	18%	21% ▲	21%	19%	24%	24%	14%	15%
A query about smart meters / my smart meter	15%	16%	20%	16%	36% ▲	14%	14%	15%
To seek help with paying my energy bills/topping up my prepayment meter	11%	11%	19% ▲	10%	32% ▲	16%	12%	12%
To find out about changing my tariff	11%	11%	11%	12%	24%	26% ▲	14%	14%
To ask for a credit balance refund	10%	9%	15% ▲	12%	21%	19%	16%	12%
To enquire about the products or services they offer	8%	9%	10%	7%	18%	22% ▲	12%	9%
There was a problem with my direct debit	8%	8%	13% ▲	8%	29% ▲	28% ▲	11%	10%
I/my household had a faulty meter	7%	7%	8%	11% ▲	16%	25% ▲	13%	10%
To make a complaint or about a previous complaint	7%	8%	13% ▲	8%	22% ▲	21% ▲	17% ▲	7%
To change the way I pay for my energy	6%	7% ▲	7%	7%	12%	20% ▲	6%	8%
I/my households gas/electricity was cut off	4%	4%	7% ▲	3%	20% ▲	19% ▲	9%	8% ▲
About switching to a new supplier	4%	4%	6%	5%	19% ▲	17% ▲	6%	6% ▲
Other reason (please specify)	9%	9%	7%	10%	-	-	8%	7%
Net: Payment query	45%	48%	60% ▲	47%	64% ▲	70%	43%	45%

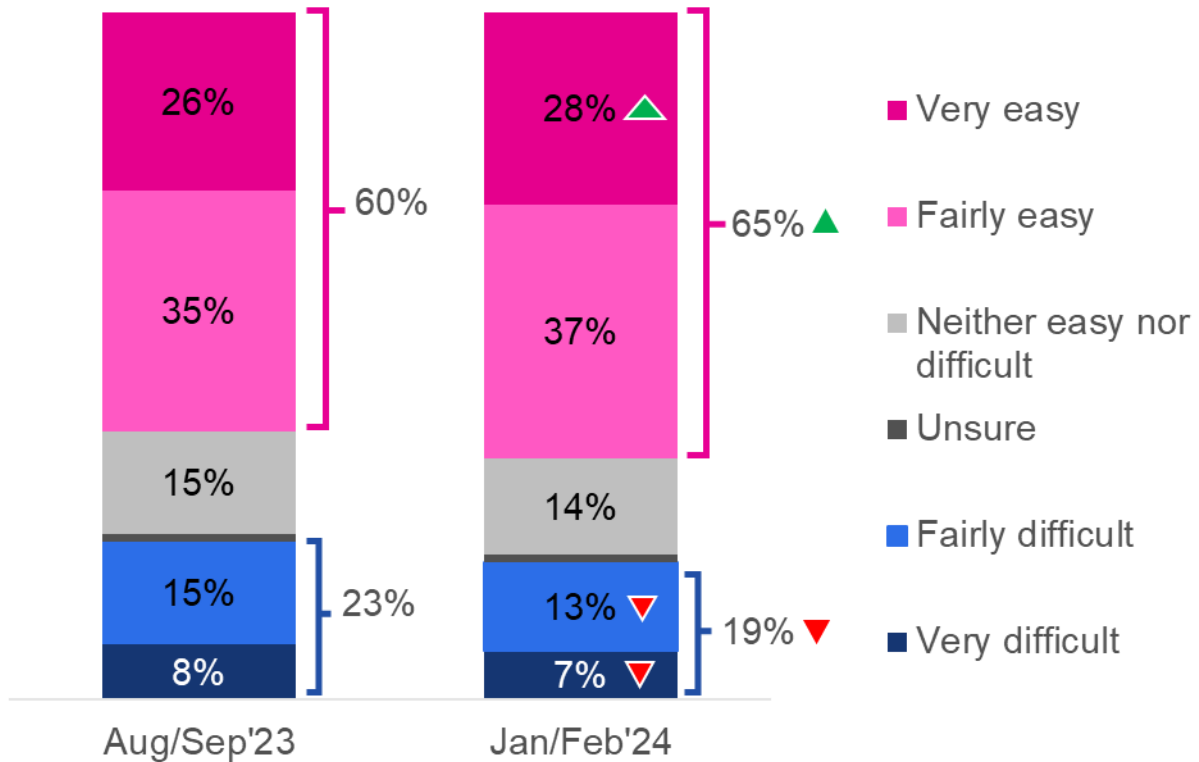
E4. Thinking of the last time you made contact with [supplier], what was it about?

Base: all who contacted or tried to contact, January/February total (1,456); phone (758); live chat (222); email (314); letter (37); social media (56); form on website (118); app (260)

Ease of contacting suppliers

Compared to August/September 2023, there has been an improvement in customers' experiences of contacting their supplier, with the proportion rating it as easy increasing from 60% to 65%, and the proportion who found it difficult decreasing from 23% to 19%.

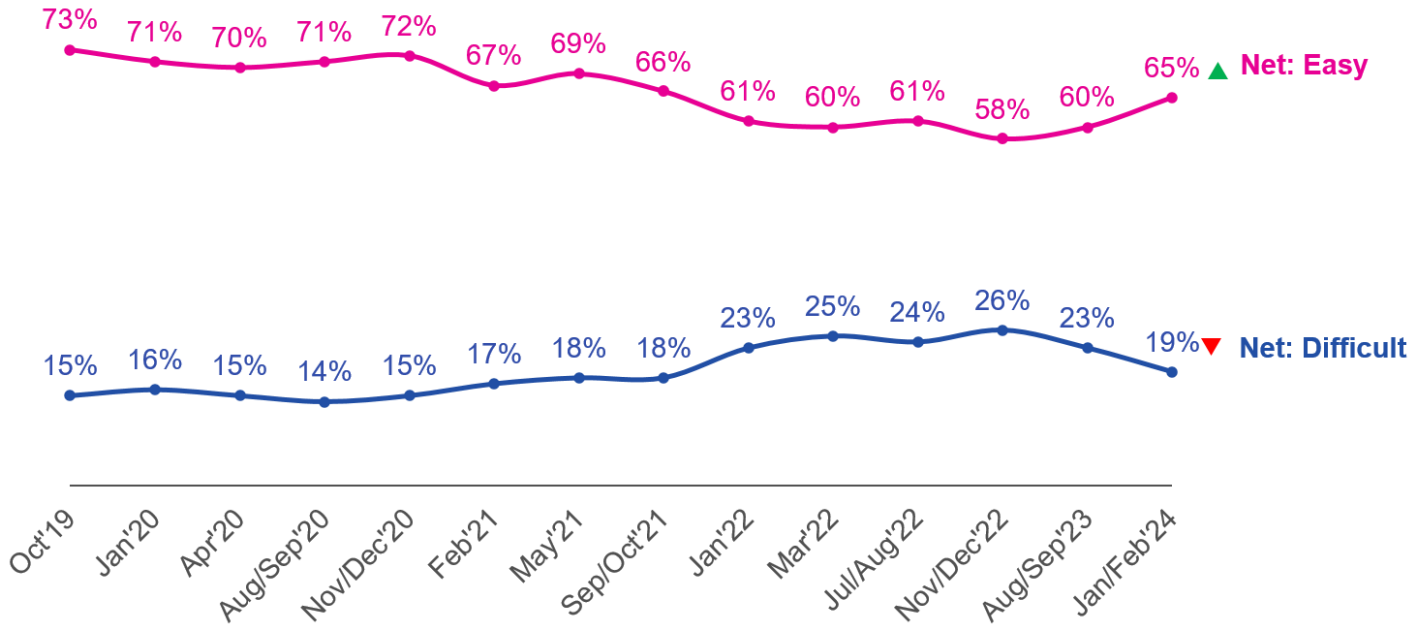
Figure 19: Ease of contacting suppliers



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);
 January/February 2024 (3,214)
 Data labels not shown for values below 3%

Despite an increase, the proportion who said they found it easy to contact their supplier is still below the peak of 73% seen in October 2019 and the proportion who said they found it difficult is higher than the peak seen in August/September 2020 (19% cf. 14%).

Figure 20: 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, January/February 2024 (3,214)

Satisfaction with elements of last contact

As well as improvement in terms of ease of contact overall, there have also been continued improvements in relation to specific methods of contact.

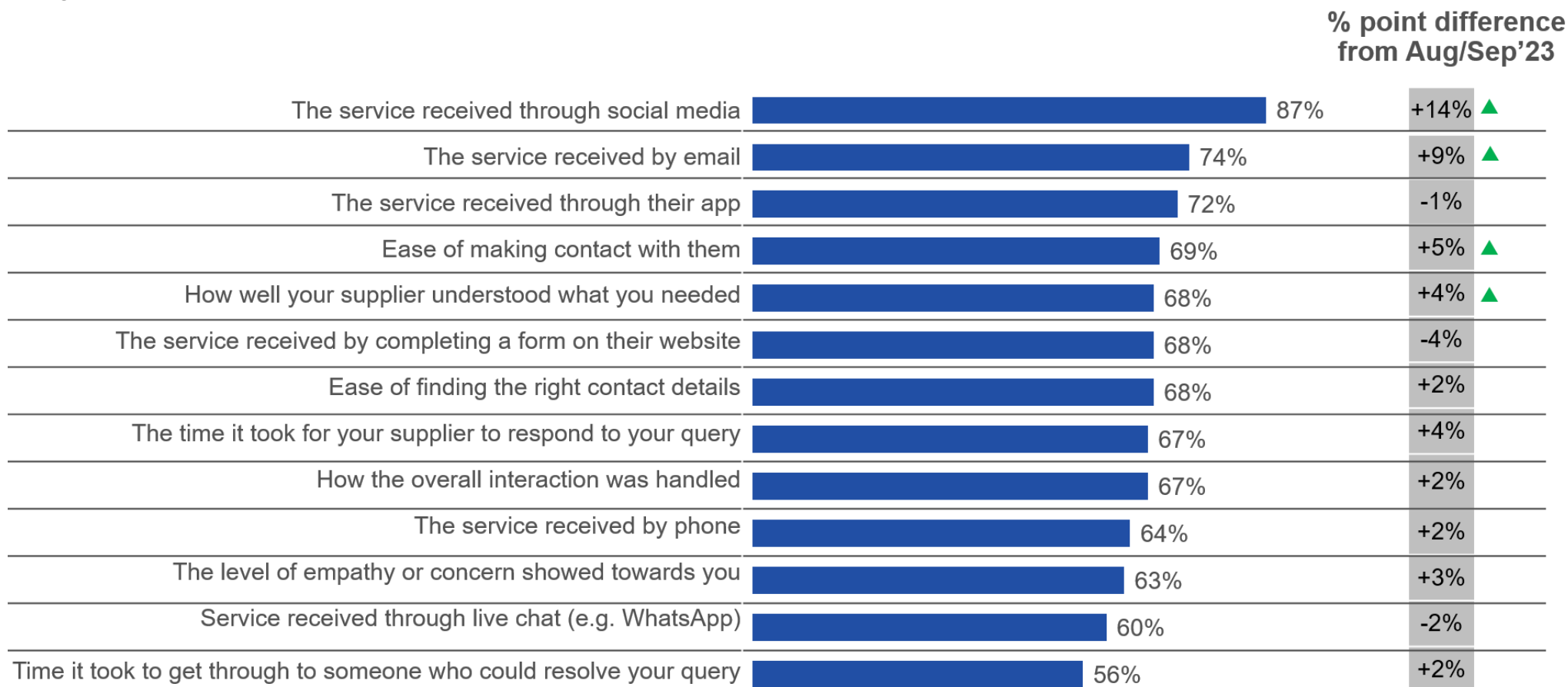
- Satisfaction with the service received through social media increased from 54% in November/December 2022, to 73% in August/September 2023, to 87% in the latest wave.
- Satisfaction with the service received through email increased from 53% in November/December 2022, to 65% in August/September 2023, to 74% in the latest wave.
- Satisfaction with the service received via the app remained stable at 72%, as did satisfaction with the service received via website form (68%), phone (64%) and live chat (60%).

In terms of other elements of contact, satisfaction has improved from 64% to 68% in relation to suppliers understanding their needs. Most notably, this increase came from those aged 65+ (64% to 72%) and those at highly vulnerable to the cost of living (from 49% to 61%).

The time taken to get through to someone who could resolve the query remains the element that generates the lowest levels of satisfaction (56%).

The level of empathy shown also generated low levels of satisfaction (63%), especially among those who had fallen behind or ran out of credit for affordability reasons (57%) and highly vulnerable to the cost of living (55%).

Figure 21: Satisfaction with elements of last contact



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, January/February 2024

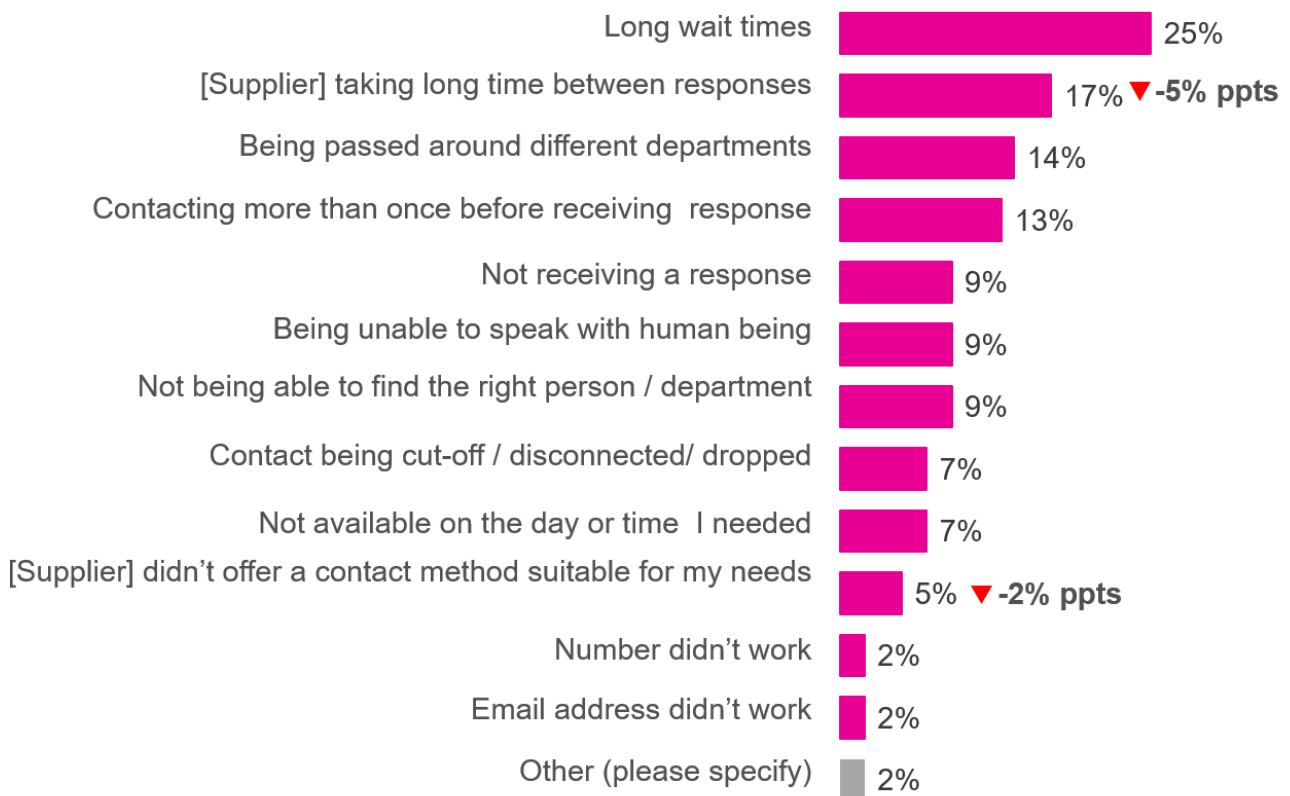
Experience of difficulties

Overall, 54% reported experiencing difficulties with their most recent contact, a downturn on the 63% who did so in August/September 2023.

As previously, and reflecting the findings outlined above, the most commonly reported difficulties experienced were long wait times (25%) and suppliers taking a long time between responses (17%), although the latter represents a decline since August/September 2023 (22%).

Overall, 38% selected one or more options linked to difficulty reaching their supplier¹⁴, lower than the 43% who did so in August/September 2023, and a similar proportion (35%) selected one or more options linked to experiencing long wait times¹⁵, again a decrease on the 41% who did so in August/September 2023.

Figure 22: 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, January/February 2024 (1,456)

¹⁴ Includes the codes: Having to get in contact more than once before you received a response, Not receiving a response, Not being able to find the right person / department, Contact being cut-off / disconnected/ dropped, Being unable to speak with a human being, Not available on the day or at the time I needed it, Being passed around different departments, <A3/A4 SUPPLIER> didn't offer a contact method suitable for my needs

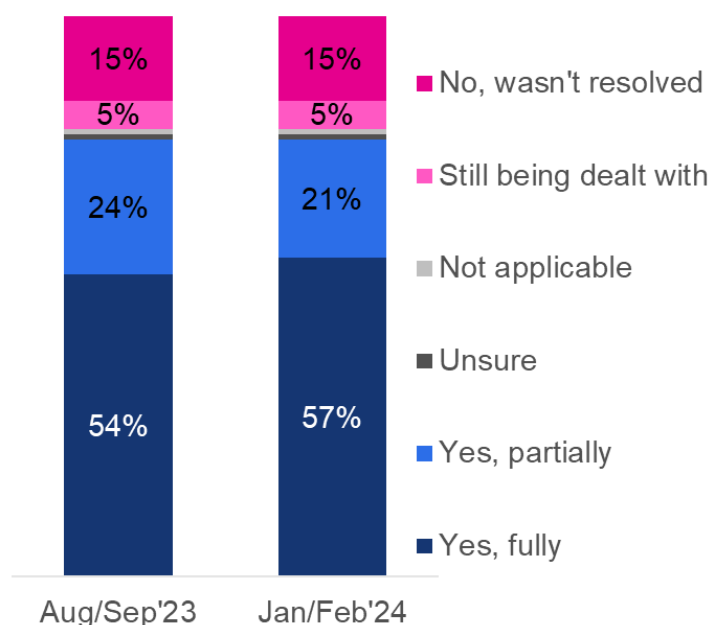
¹⁵ Includes the codes long wait times and taking a long time between responses.

Consumers who contacted via letter (58%), phone (45%), live chat (53%) and social media (54%) were most likely to say they found it takes a long time, while consumers contacting through live chat (57%), writing a letter (88%) and social media (70%) were most likely to report finding it hard to reach somebody.

Issue resolution

In line with August/September 2023, 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 fifth (21%) said that it was partially resolved, and the remaining 57% said it was fully resolved.

Figure 23: Issue resolution



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); January/February 2024 (1,456)

Consumers contacting by phone were less likely to say they got a resolution to their query (17% not resolved).

Additionally, consumers with a long-term illness, physical or mental health problem or disability (18%), renters (18%), and those highly vulnerable to the cost of living (24%) were also less likely to report their issue was resolved.

Queries regarding complaints (28%), smart meters (27%) and bills (22%) were more likely than average to be reported as unresolved, as were enquiries about products or services (22%). Queries asking for a credit balance refund were the most likely to be reported as resolved (66%).

Overall, one in five (22%) found the number of times they had to contact their supplier about an issue unacceptable. Respondents who had contacted via phone were more likely to find the number of times

they needed to get in contact unacceptable (28%), whereas those contacting by letter, social media and email found it more acceptable (78%, 76% and 67% respectively).

Customers who were contacting about a query over a bill they received, about their smart meter, or in regard to a complaint were also more likely to find the number of times they needed to contact unacceptable (35%, 34% and 51% respectively).

Complaints

Overview of findings

- **Fewer contacted about making a complaint:** the proportion of respondents who reported having made contact to make a complaint reduced from 10% to 7%, which equates to 2% of all respondents. The most common reasons for complaint were problems with bills (47%), followed by a problem with a smart meter (26%).
- **Satisfaction for complaints handling and process length remains low:** levels of satisfaction with the overall handling of the complaint and the time taken to reach the end of the process remain low (36% and 34% respectively) and stable with August/September 2023.

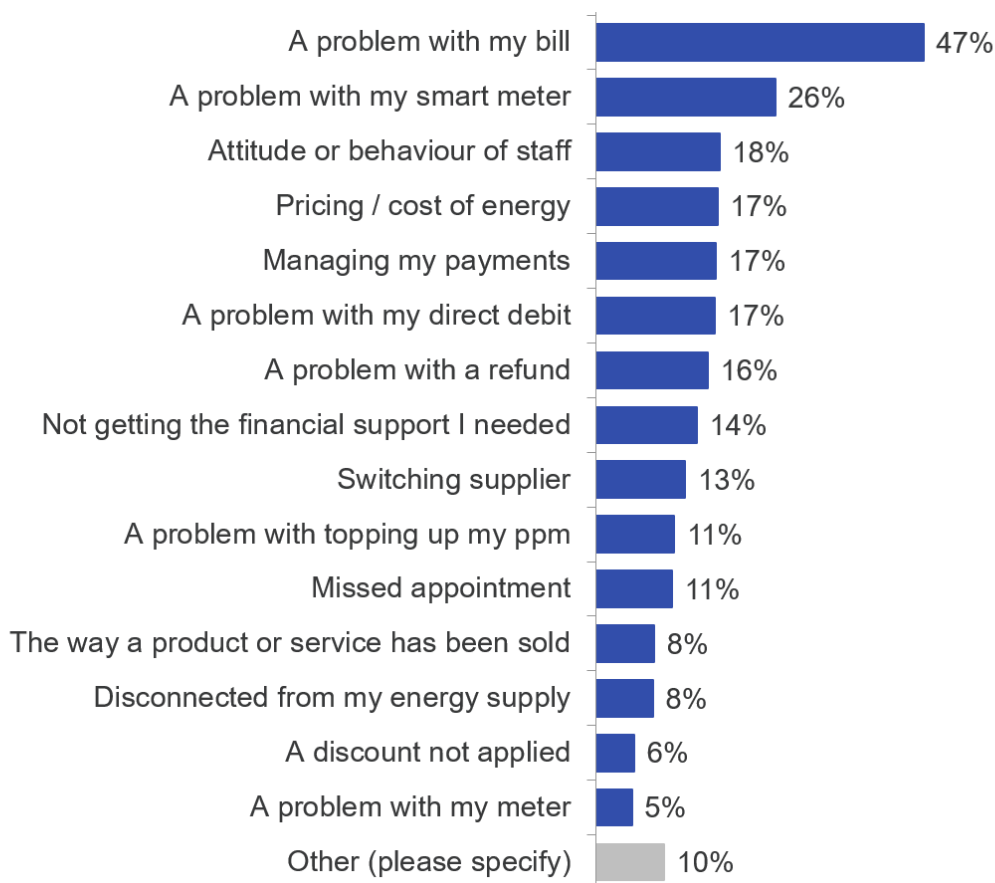
Reasons for complaints

The proportion of respondents who reported making a complaint has reduced from 10% to 7%, which equates to 2% of all respondents.

Problems with bills remains the most common reason respondents report for complaining, mentioned by half (47%) of complainants, a significant uplift on the 32% who complained for this reason in August/September 2023, followed by problems with smart meters, mentioned by a quarter (26%).

Around one in five were complaints about the attitude or behaviour of staff (18%), the cost of energy (17%), managing payments (17%) or problems with direct debits (17%).

Figure 24: Reasons for complaints



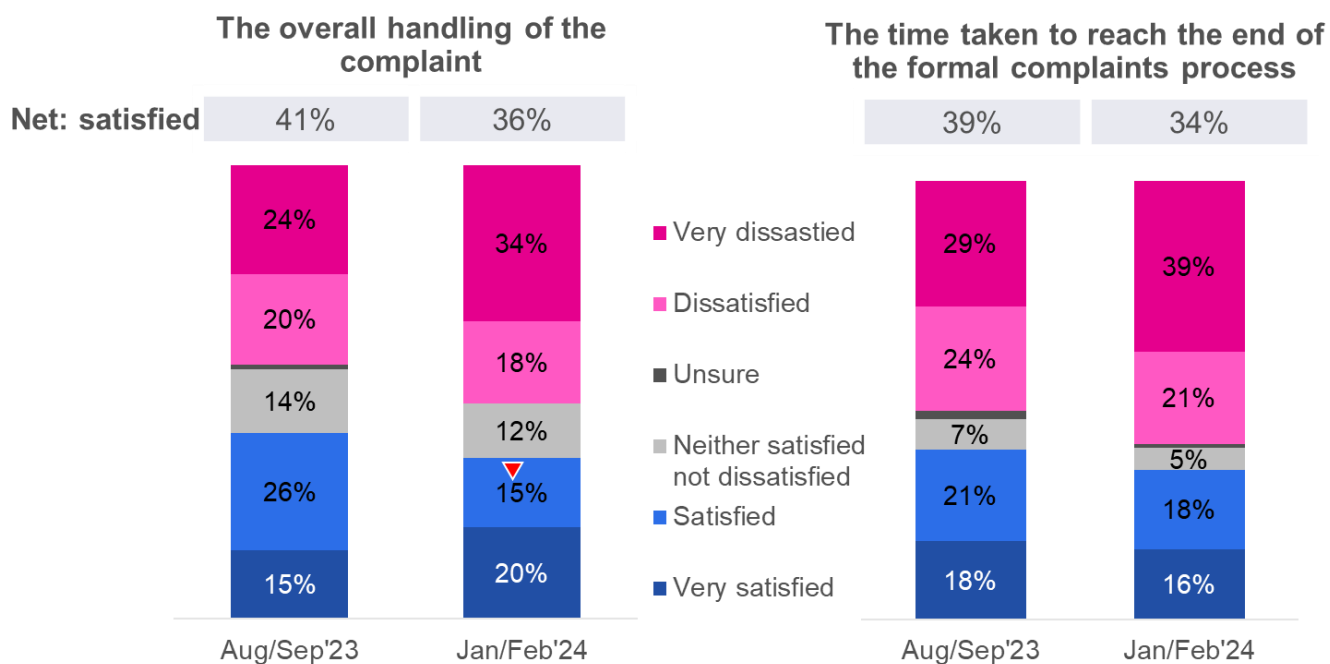
E8. Earlier you said your last contact with [supplier] was about a complaint. What was the complaint about?
 Base: all contacted to make a complaint, August/September 2023 (149); January/February 2024 (101)

Much in line with August/September 2023, a third (33%) reported they were still dealing with the complaint themselves, a quarter (25%) had reached the end of the process, 12% had given up, 18% were still dealing with the complaint and had received advice from Citizen’s Advice, and 7% said they had escalated the complaint to the energy ombudsman.

Satisfaction with elements of complaints handling

While fewer respondents reported making complaints, levels of satisfaction with the overall handling of the complaint and the time taken to reach the end of the process remained low (36% and 34% respectively). While this appears lower than August/September 2023, the differences cannot be interpreted as statistically significant, given the low sample size for this question.

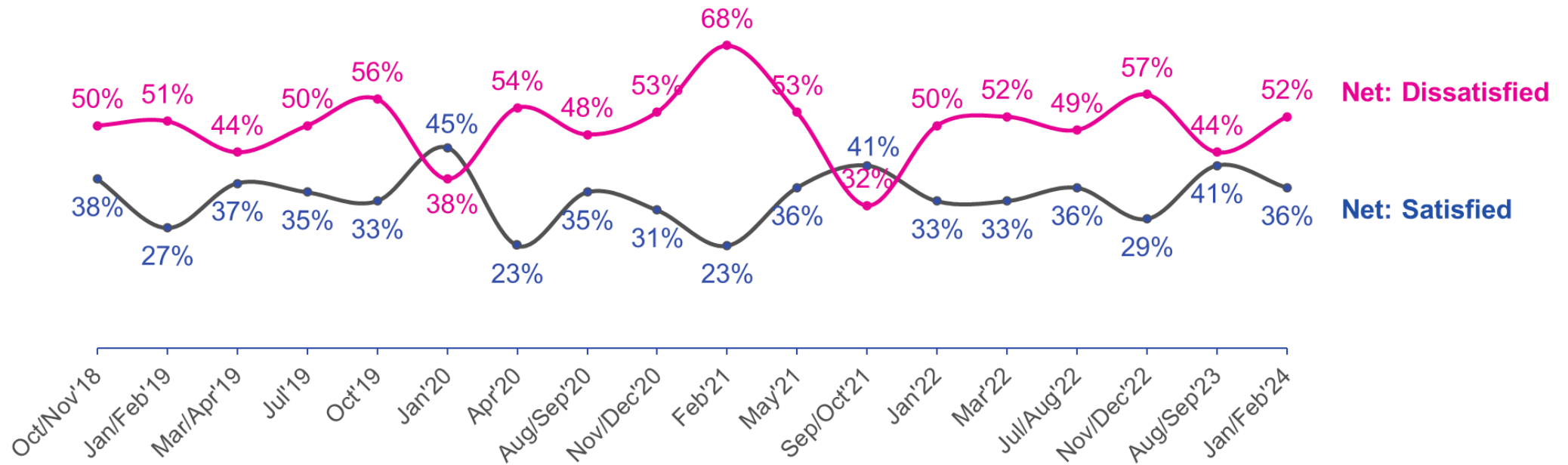
Figure 25: Satisfaction with elements of complaints handling



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);
 January/February 2024, contacted to make a complaint (101)/ reached end of complaints process (23)
 Data labels not shown for values below 3%

Considering this in the longer term, while levels of satisfaction vary over time due to low base sizes, satisfaction with the overall handling of complaints is at around the average level compared to previous waves.

Figure 26: 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); January/February 2024 (101).

Information Provided by Suppliers

Overview of findings

- **Satisfaction with information provided remains high:** most were satisfied with the information¹⁶ they had received from their supplier in the last 6 months (75%), with 8% dissatisfied. This is in line with August/September 2023.
- **Information seen as useful:** all types of information were regarded as useful by at least four in five respondents.

Satisfaction with supplier information

Three quarters (75%) were satisfied with the information they had received from their supplier in the last six months, while close to one in ten (8%) were dissatisfied, in line with August/September 2023.

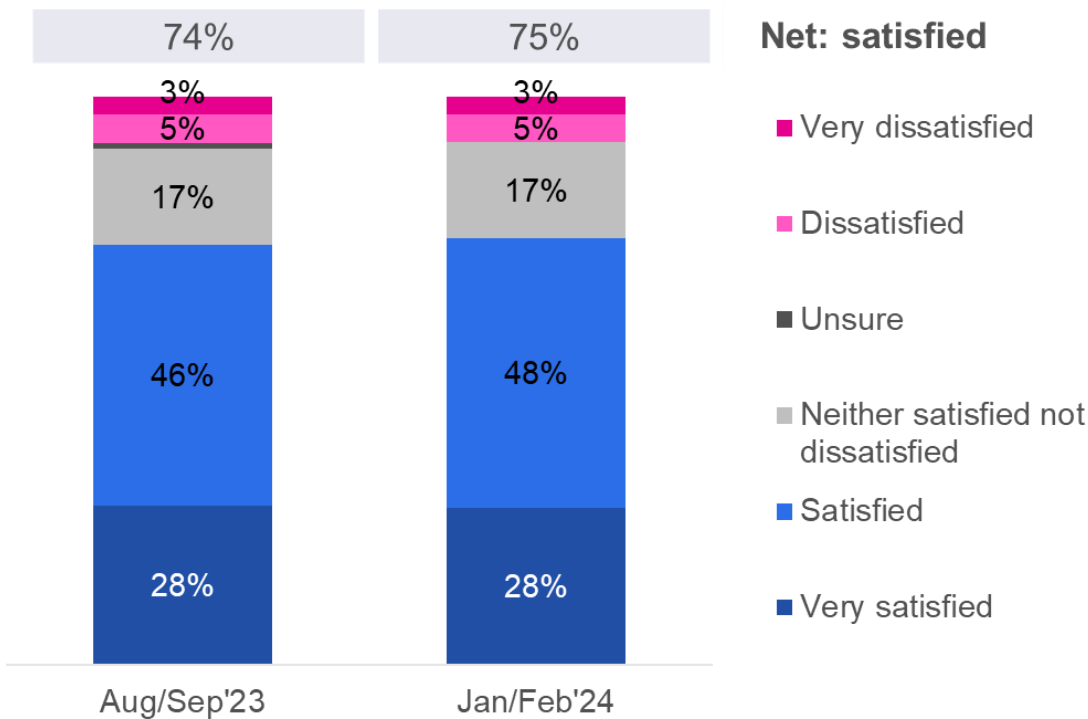


Figure 27: Satisfaction with information received from supplier

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); January/February 2024 (2,533).

¹⁶ This includes any information, such as written information on bills or information provided over the phone

Those more likely to say they are dissatisfied with the information received were: those behind on bills (18%), those who have fallen behind / run out of credit for affordability reasons (16%), and those highly vulnerable to the cost of living (12%).

Prepayment meter and standard credit customers (both 11%) were also more likely to be dissatisfied with information they have received, compared to 6% of direct debit customers.

Recall and usefulness of information received from supplier

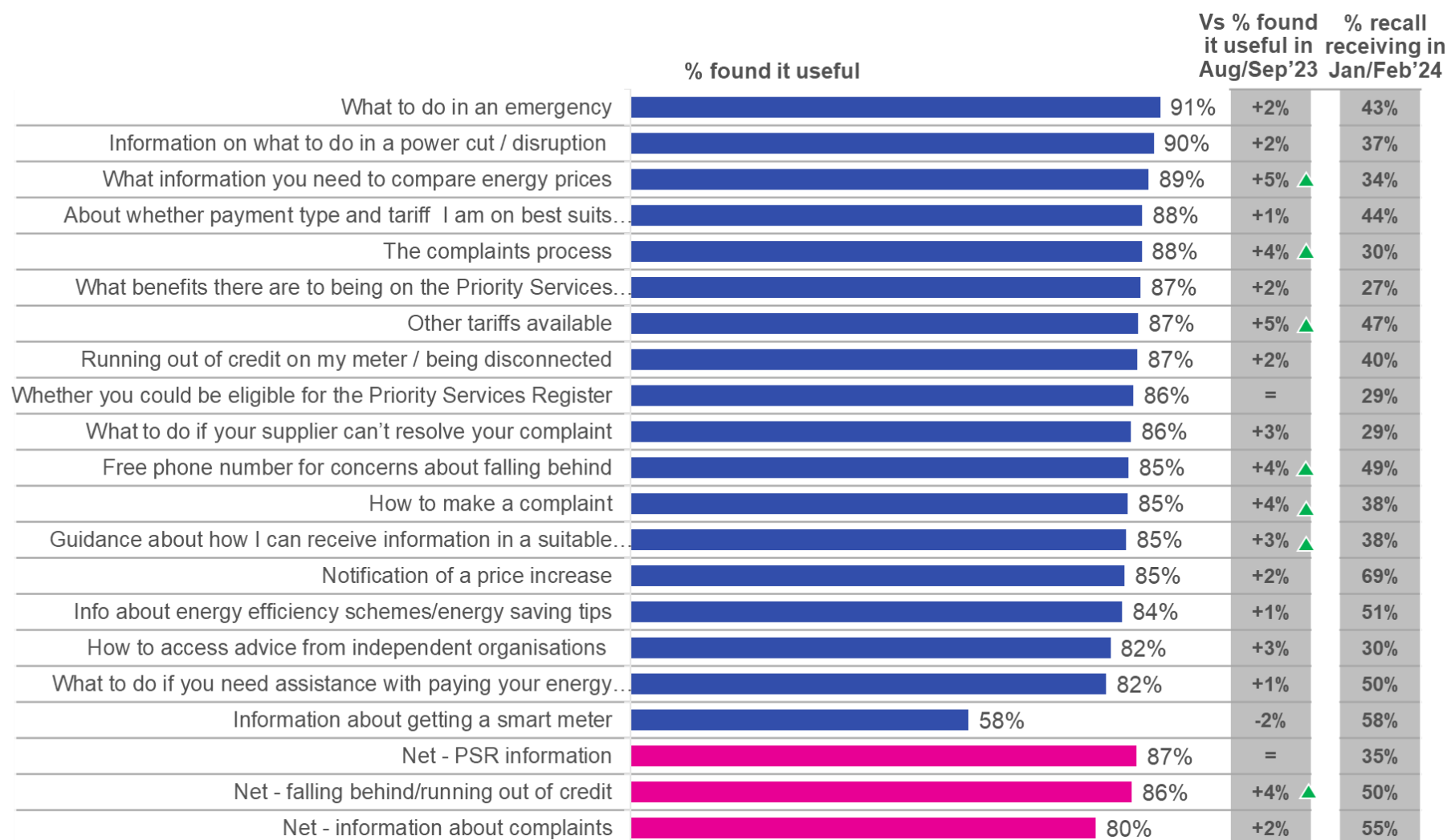
Respondents were most likely to recall receiving notifications of price increases (69%), information about smart meters (58%), information about energy efficiency (51%), and what to do if assistance is needed in paying energy bills (50%).

In terms of the usefulness of the information received from suppliers, all types were regarded as useful by at least four in five respondents. The exception was the usefulness of information about getting a smart meter, which was regarded as useful by 58% of those who don't have a smart meter or don't know if they have one. Perceived usefulness of information about getting a smart meter increased to 77% among those who don't have a smart meter but would consider getting a smart meter.

The full range of responses is shown in Figure 28.

Regarding the small proportion of respondents who received information from their supplier when a prepayment meter was installed, three quarters (74%) were satisfied and 8% were dissatisfied.

Figure 28: Usefulness of information received from supplier



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); January/February 2024 (3,855). D3: How useful was the information you received for each of the following... Base: received information, August/September 2023 (mixed base sizes); January/February 2024 (mixed base sizes).

What are the experiences of customers struggling financially?

Overview of findings

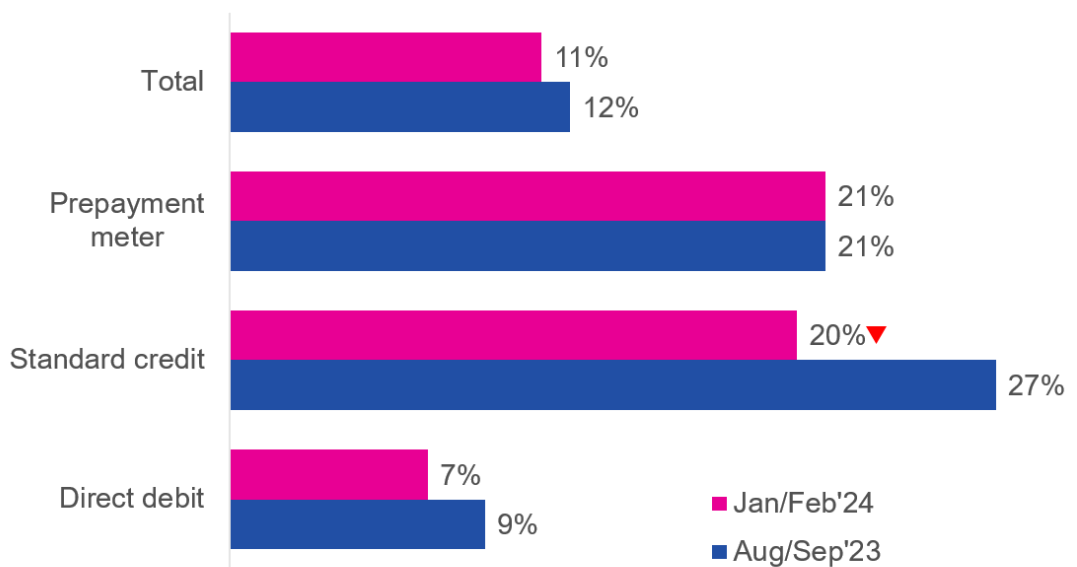
- **Affordability issues vary by payment method:** 11% of respondents said they had fallen behind on their bills or had run out of credit in the last three months for affordability reasons. However, this hides the disparity across payment methods. One in five prepayment (21%) and standard credit customers (20%) had fallen behind on their bills or had run out of credit compared to just 7% of direct debit customers.
- **Fewer were contacted by their supplier and offered support:** among those falling behind or running out of credit for affordability reasons, over one in ten (12%) said their supplier contacted them to offer support once they had fallen behind/run out of credit, fewer than the 17% who reported this in August/September 2023. Close to half (48%) said they had contacted their supplier, so, in total, two in five (60%) had been in contact with their supplier.
- **Most were offered support from their supplier once they had been in contact:** over four in five (86%) 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, and 6% said they were only offered information about the organisations that provide support and not offered any other form of support.
- **Most were satisfied with the support they had received:** among those who had contact about paying their bills, three in five were satisfied with the support they had received with paying their bills, in line with August/September 2023 (61% compared to 63%), although 22% were dissatisfied.
- **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 (63%), but one in five (21%) said their disconnection lasted 12 hours or more.

Falling behind or running out of credit for affordability reasons

Overall, one in ten (11%) of all respondents reported either falling behind on direct debit or standard credit payments or running out of credit on prepayment meters for affordability reasons, in line with August/September 2023 (12%).

Direct debit customers were less likely to report falling behind/running out of credit for affordability reasons than prepayment meter and standard credit customers (7% cf. 21% and 20% respectively). That said, the proportion of standard credit customers reporting this had reduced from 27% in August/September 2023.

Figure 29: 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, total (2902), direct debit (2,406), standard credit (546); January/February 2024, total (3207), direct debit (2,702), standard credit (542);

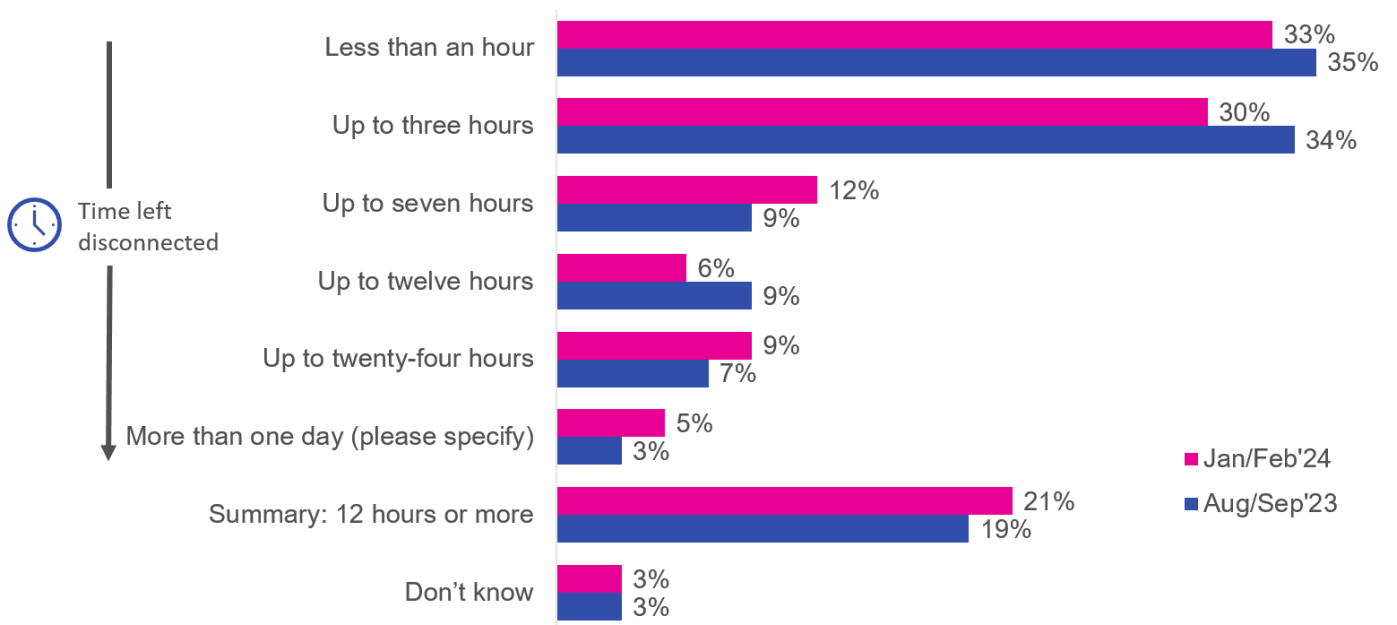
G2: Thinking about the past 3 months, has your household run out of credit on your prepayment meter so that you have been temporarily disconnected from your energy supply?

Base: August/September 2023, prepayment meter (696); January/February 2024 (600)

Several groups of consumers were more likely to say they have fallen behind or run out of credit for affordability reasons, with the most obvious being the extent to which people were financially comfortable. Consumers highly vulnerable to the cost of living (27%) were more likely to have fallen behind for affordability reasons, as were those in receipt of benefits (20%). Those on the PSR (19%) and those renting in the private or social housing sector (19%) were also more likely to report they fell behind or ran out of credit for affordability reasons.

Prepayment customers who had run out of credit for affordability reasons were asked how long they had been disconnected from their energy supply. Most (63%) prepayment customers who had run out of credit for affordability reasons said they ran out for up to 3 hours, but one in five (21%) reported they were out of credit for 12 hours or more, in line with August/September 2023.

Figure 30: Duration of disconnection



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

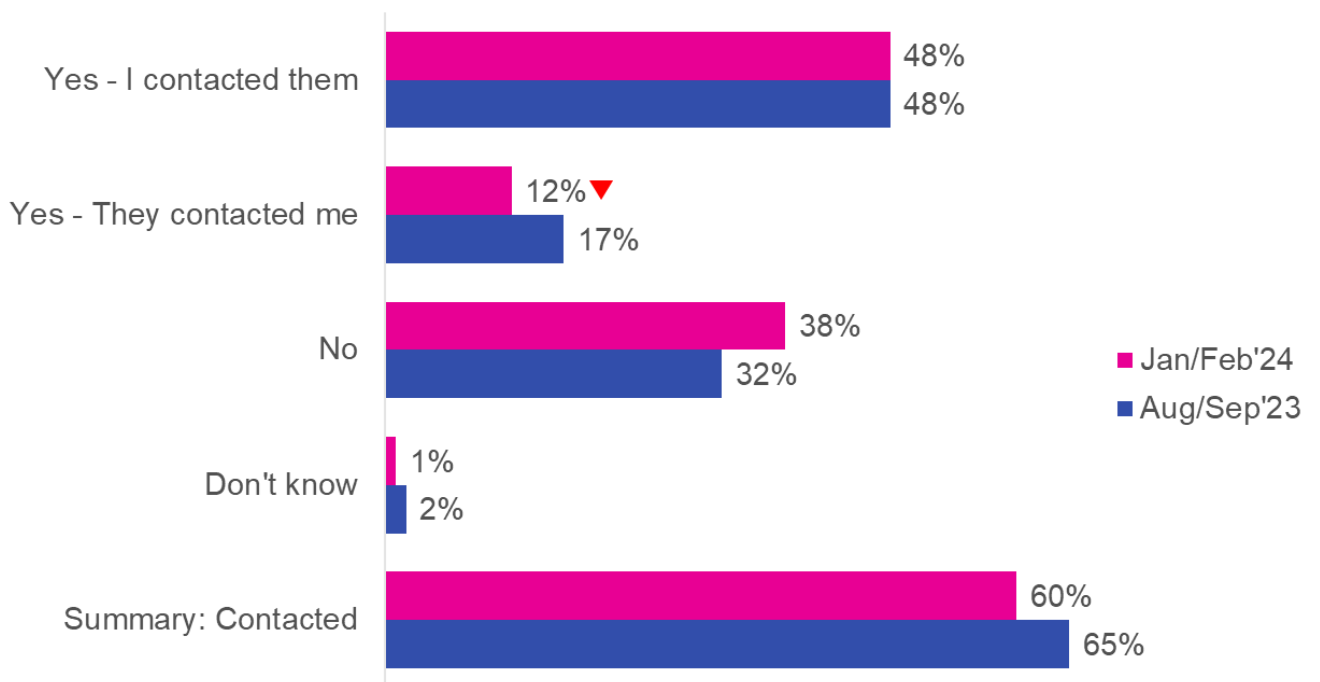
Base: prepayment meter ran out of credit for affordability reasons, August/September 2023 (156);

January/February 2024 (138)

Contact with supplier

Half (48%) of those who had run out of credit or fallen behind for affordability reasons reported having contacted their supplier about help with paying their bills, in line with August/September 2023. However, significantly fewer reported being contacted by their supplier in this wave of research (12% cf. 17%).

Figure 31: 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);
 January/February 2024 (508)

Respondents who are vulnerable (46%) or highly vulnerable (52%) to cost of living pressures were less likely to have had contact with their suppliers compared to those who were doing well financially but have fallen behind (88%). This suggests a need for suppliers to make more effort to connect with customers who are likely to be struggling the most.

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.

Telephone remains the most common method of contact for these respondents, mentioned by over half (56%), and to a greater extent than in August/September 2023 (47%).

As in August/September 2023, this was followed by email (25%), live chat (19%) and the supplier's app (18%).

Around one in ten had contacted, or had been contacted, via letter (12%), down on 17% in August/September 2023, via a form on the supplier's website (12%) and via social media (8%).

Among the 48% of respondents who had run out of credit/fallen behind for affordability reasons who reported having contacted their supplier about help with paying their bills, two in five (39%) reported making contact before this happened, 44% just after, and 12% quite a while after.

Among the 12% of respondents who had run out of credit/fallen behind on their energy bills for affordability reasons and who reported being contacted by their supplier about help with paying their bills, one in five (18%) reported being contacted before they fell behind or ran out of credit for affordability reasons, half (50%) just after, and a quarter (24%) quite a while after.

Support offered by supplier

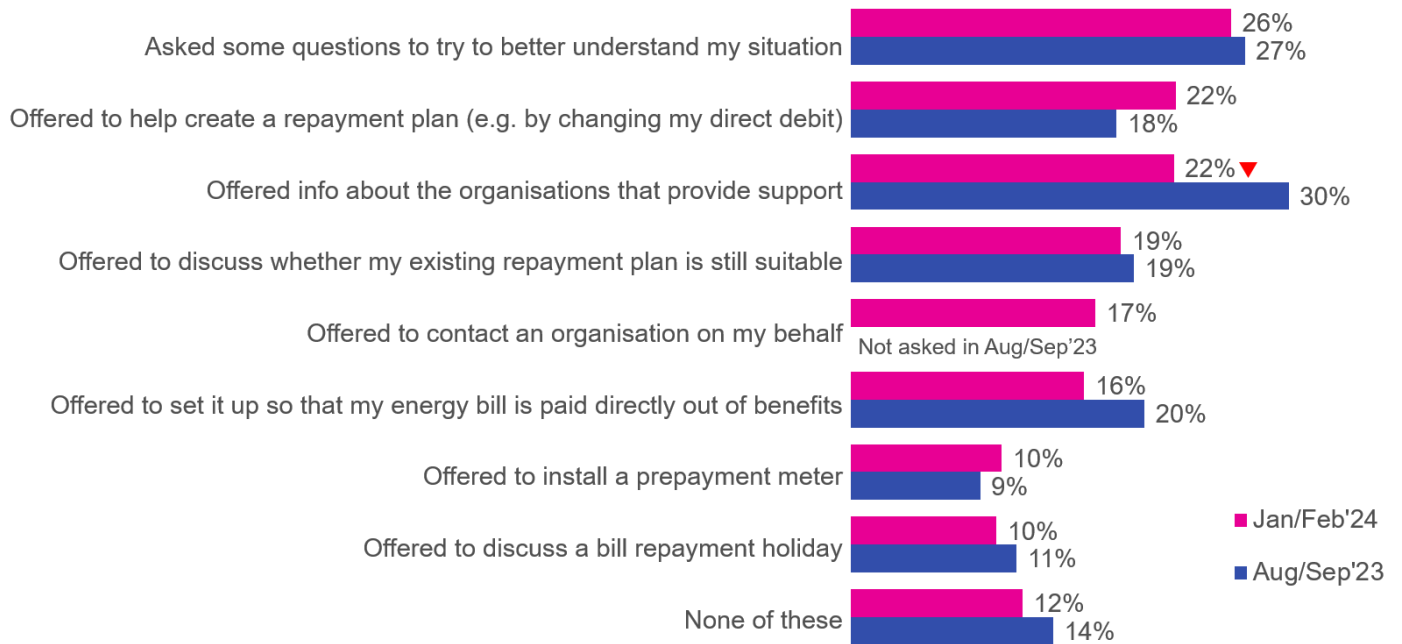
Among those who had contacted, or been contacted by, their supplier, over four in five (86%) said they were offered at least one type of support, in line with August/September 2023 (82%).

Within this, 71% were offered non-financial support and 18% were offered financial support (cf. 73% and 21% respectively in August/September 2023).

Non-financial support was offered through asking questions to better understand their situation (26%), offering to help creating a repayment plan (22%), or offering information about organisations that provide support (22%), although the latter has declined from 30% in August/September 2023.

Only 6% of consumers who contacted or were contacted by their supplier said they were only offered information about the organisations that provide support and not offered any other form of support.

Figure 32: Support offered by supplier to 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?

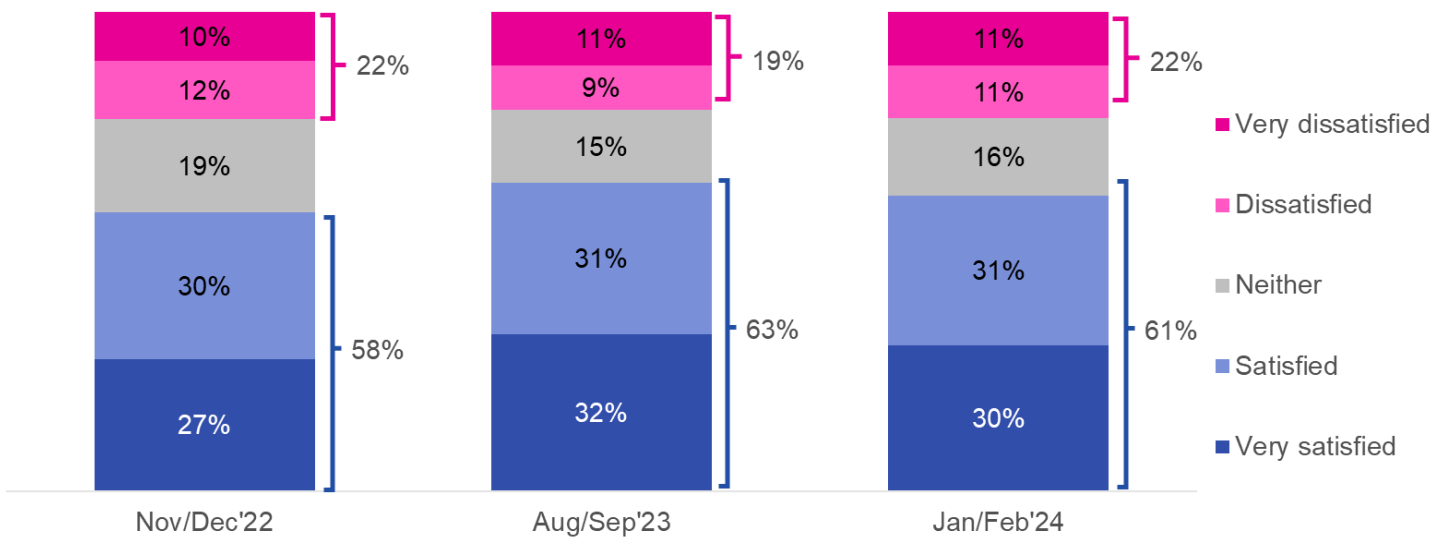
Base: contacted/been contacted by their supplier and fell behind/ran out for affordability reasons. August/September 2023 (363); January/February 2024 (308)

Among the 39% who had discussed a repayment plan with their energy supplier, 74% said they were asked by their supplier how much they could afford to pay. This is lower than in August/September 2023 (85%).

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 (61%) were satisfied with the support they received for keeping up with their energy costs, in line with November/December 2022 and August/September 2023. Dissatisfaction also remained in line with the previous two waves of research at 22%.

Figure 33: 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?

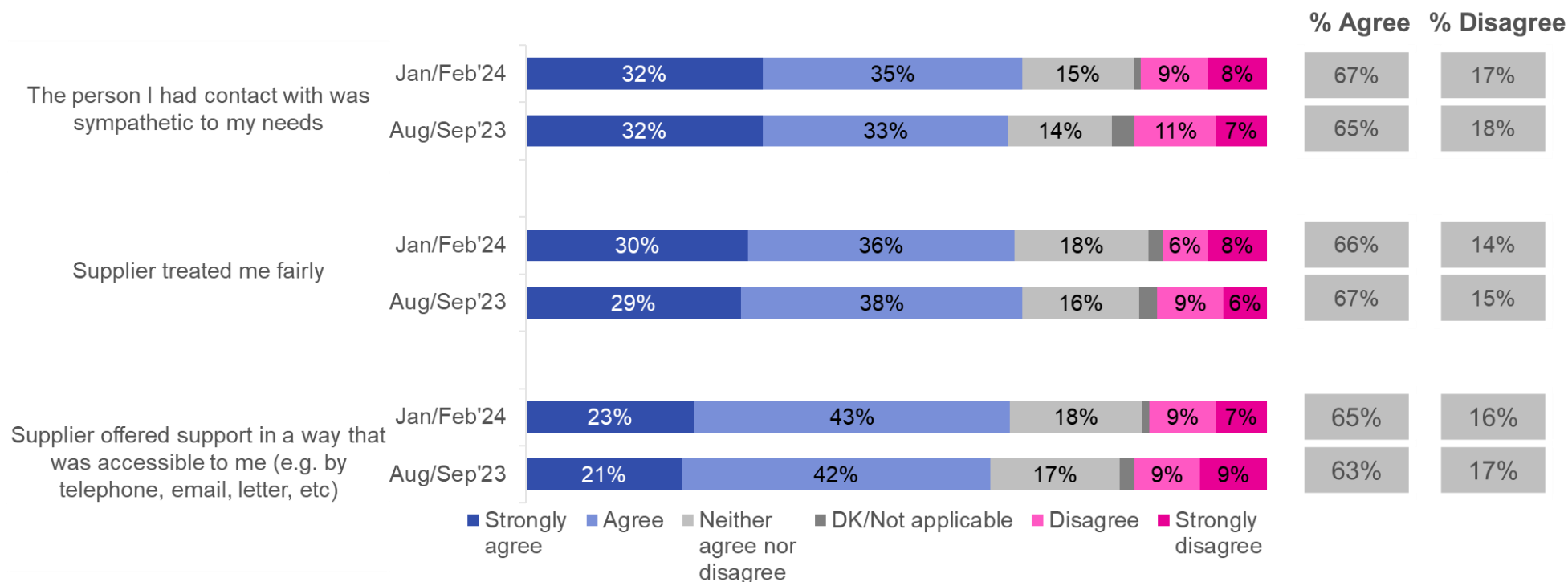
Base: contacted or been contacted by their supplier and online and fell behind/ran out for affordability reasons: November/December 2022 (339); August/September 2023 (363); January/February 2024 (307)

Those who are most financially stretched continue to express the highest levels of dissatisfaction with support received in relation to paying for bills, with 35% of those 'highly vulnerable' to cost of living pressures dissatisfied, compared to 9% of those 'doing well'.

Experience of contact with supplier

In line with August/September 2023, among those who had fallen behind on their energy bills or run out of credit for affordability reasons and spoken to their supplier about support, two thirds agreed that their supplier was sympathetic (67%), had treated them fairly (66%) and offered them accessible support (65%).

Figure 34: Experience of contact with supplier (1)

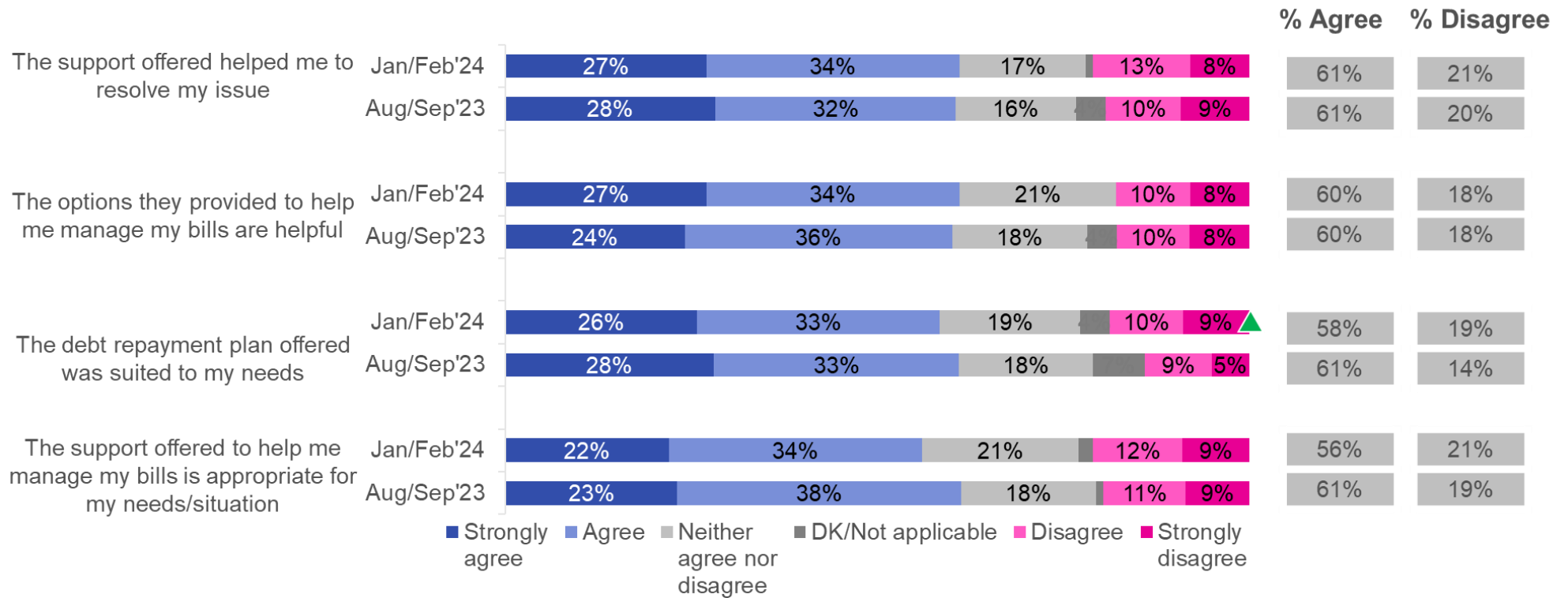


G13: To what extent do you agree or disagree with the following statements about the contact you've had with your energy supplier about paying your bills? Please answer on a scale of 1 to 5 where 1 is strongly disagree and 5 is strongly agree.

Base: contacted/been contacted by their supplier and fell behind/ran out for affordability reasons, August/September 2023 (363); January/February 2024 (308)
Options 4% or below not shown.

While six in ten (61%) agreed that the support offered helped them resolve their issue, one in five (21%) disagreed that this was the case. This pattern was replicated regarding the helpfulness of the options offered to help manage bills (60% agreed and 18% disagreed) and the suitability of the debt repayment offered (58% agreed and 19% disagreed).

Figure 35: Experience of contact with supplier (2)



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); January/February 2024 (308)

Consumers classified as 'highly financially vulnerable' to cost of living pressures were more likely to disagree with each element than those classified as 'doing well', but the differences were most marked in relation to issue resolution (31% disagreed cf. 4%), finding the support helpful (30% disagreed cf. 6%), the appropriateness of the support offered (29% disagreed cf. 10%) and the suitability of the debt repayment plan offered (29% disagreed cf. 7%).

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

Smart meters

Overview of findings

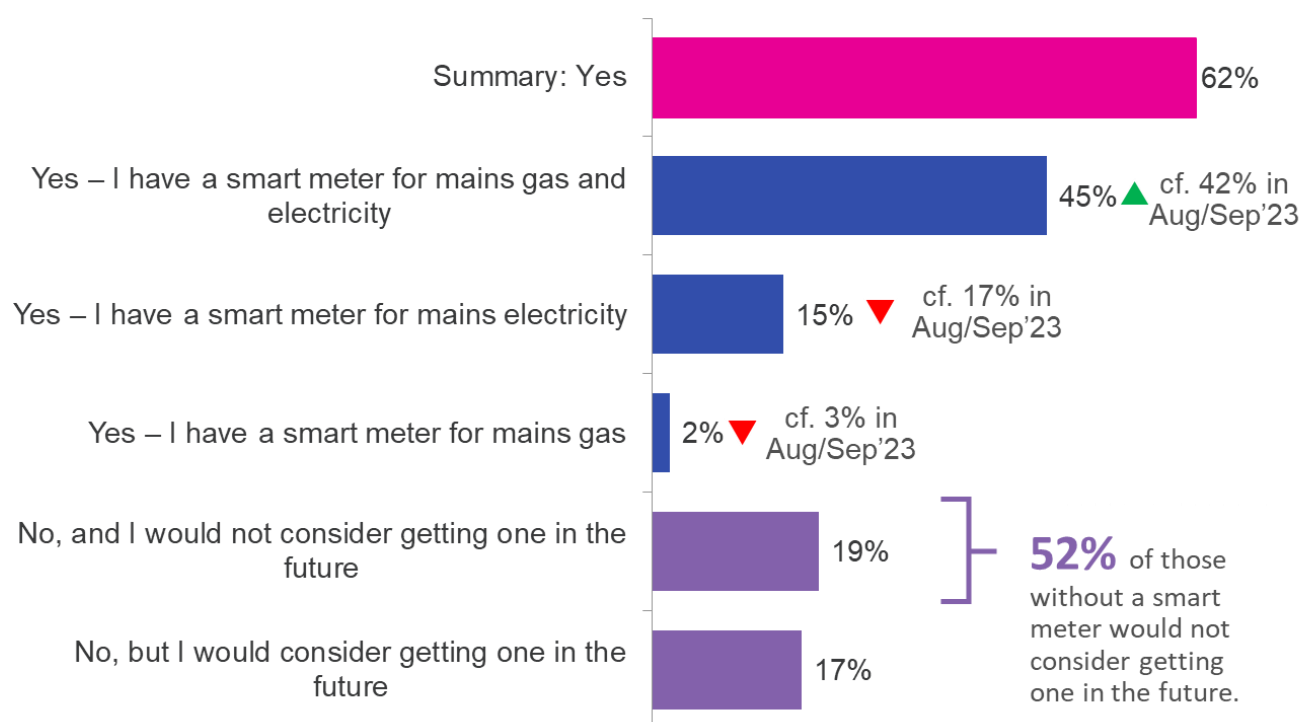
- **Two-thirds satisfied with their smart meter:** two-thirds (68%) of those with smart meters were satisfied with their smart meter, with just 11% dissatisfied. Those more likely to be dissatisfied with their smart meter included those classified as being 'highly vulnerable' to cost of living pressures (18%) and those with a long-term illness, physical or mental health problem or disability (13%).
- **A notable proportion reported experiencing issues with their smart meter:** a third (33%) of households with a smart meter reported experiencing an issue with it in the last three months, rising to 53% of standard credit meter customers and 41% of prepayment meter customers. Issues around in-home displays (12%) and automatic readings (11%) remained the most common faults experienced.

Smart meter households

Overall, three in five (62%) reported that their household had a smart meter, in line with August/September 2023. This is consistent with official figures on smart meter installations in Great Britain (61% in Q4 2023)¹⁷.

Of those without a smart meter, 52% said they would not consider getting one in the future. Some demographic groups were significantly more likely to say that they would *not* consider getting a smart meter in the future, those aged over 65 (73%) and those who were digitally excluded (81%).

Figure 36: Smart meter ownership



Source: C1. Do you have a smart meter in your household? Base: August/September 2023 (3742); January/February 2024 (3,855)

Issues with smart meters

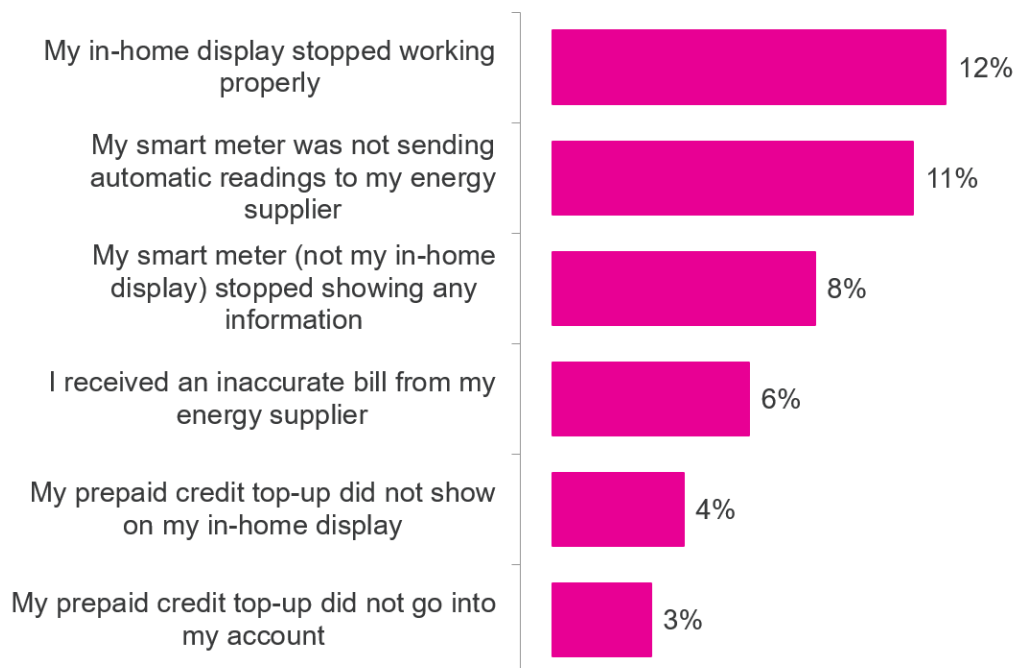
Overall, a third (33%) of respondents with smart meters reported experiencing issues with them in the last three months, a reduction of 3% since August/September 2023.

Customers paying by standard credit and pre-payment meter were significantly more likely to say they had experienced issues (53% and 41%).

¹⁷ See: [Smart meters in Great Britain, quarterly update December 2023](#)

The issues most commonly reported by survey participants were that the in-home display stopped working properly (12%), the smart meter was not sending automatic readings to the energy supplier (11%), or the smart meter stopped showing any information (8%), as was the case in August/September 2023.

Figure 37: Experiences of issues with smart meter in the last three months



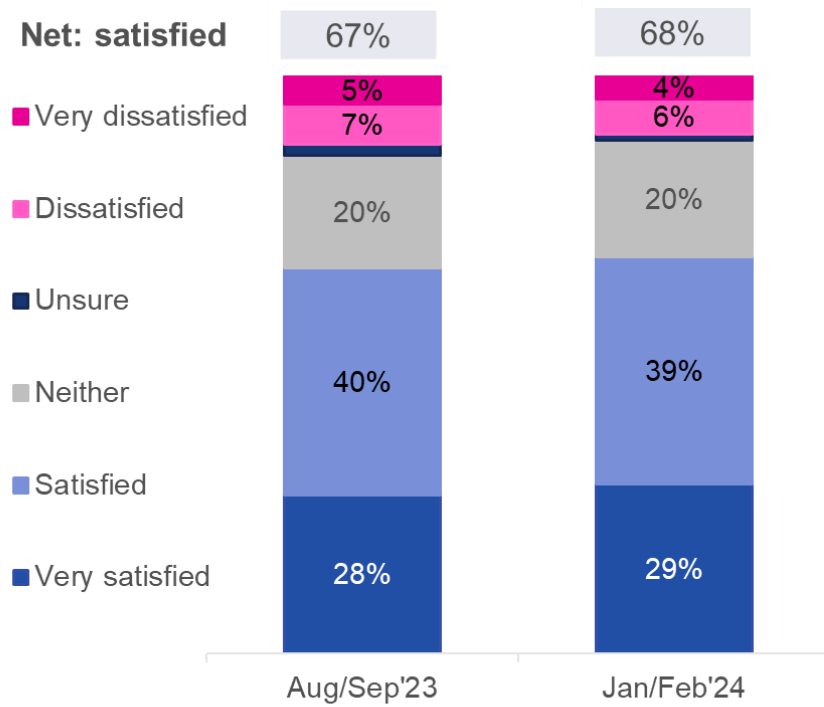
C9. In the last 3 months, have you encountered any of the following issues or problems with your smart meter?
 Base: those with a smart meter, August/September 2023 (2,248); January/February 2024 (2,350)

The most significant issues for standard credit customers were smart meters not sending automatic readings to their supplier (17% cf. 11% for direct debit) and the in-home display not working properly (17% cf. 11% for direct debit).

The most significant issue for prepayment customers was reported to be the prepaid credit top-up not showing on the in-home display (14%).

As was the case in August/September 2023, two-thirds (68%) of those with smart meters expressed satisfaction with them, while one in ten (11%) were dissatisfied. The remaining 20% were neither satisfied nor dissatisfied.

Figure 38: Satisfaction with smart meter



C6. Overall, how satisfied or dissatisfied are you with your smart meter?

Base: those with a smart meter, August/September 2023 (2,248); January/February 2024 (2,350)

As seen in August/September 2023, those more likely to say they are *dissatisfied* with their smart meter were those 'highly vulnerable' to cost of living pressures (18%) and those with a long-term illness, physical or mental health problem or disability (13%).

Despite higher reported issues for those paying by standard credit and prepayment meters, satisfaction with smart meters for standard credit customers was in line with direct debit customers, and prepayment customers had a higher level of satisfaction at 73% (cf. 66% of standard credit users).

The smart meter not sending automatic readings (35%), the smart meter (not in-home display) not showing any information (31%), and the in-home display not working (30%) continued to be the main issues experienced with smart meters.

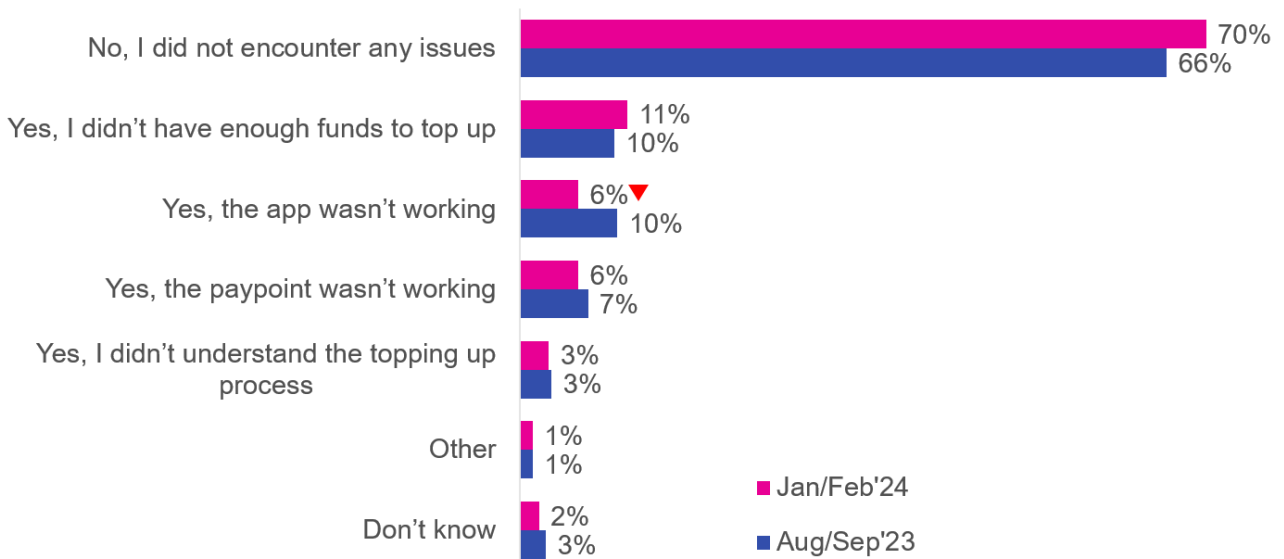
Topping up prepayment meters

Three in ten (27%) prepayment customers reported encountering an issue when they last topped up their prepayment meter, in line with August/September 2023 (31%).

This included one in ten (12%) who encountered a technical problem¹⁸, a reduction from the 17% who reported this in August/September 2023, driven by a reduction in the proportion saying the app was not working, from 10% to 6%. A further 6% said the pay point was not working.

The majority (70%) did not encounter an issue when topping up their prepayment meter.

Figure 39: 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); January/February 2024 (600)

¹⁸ Technical issues include “yes, the app wasn’t working” and “yes, the paypoint wasn’t working”

Priority Services Register (PSR)

Overview of findings

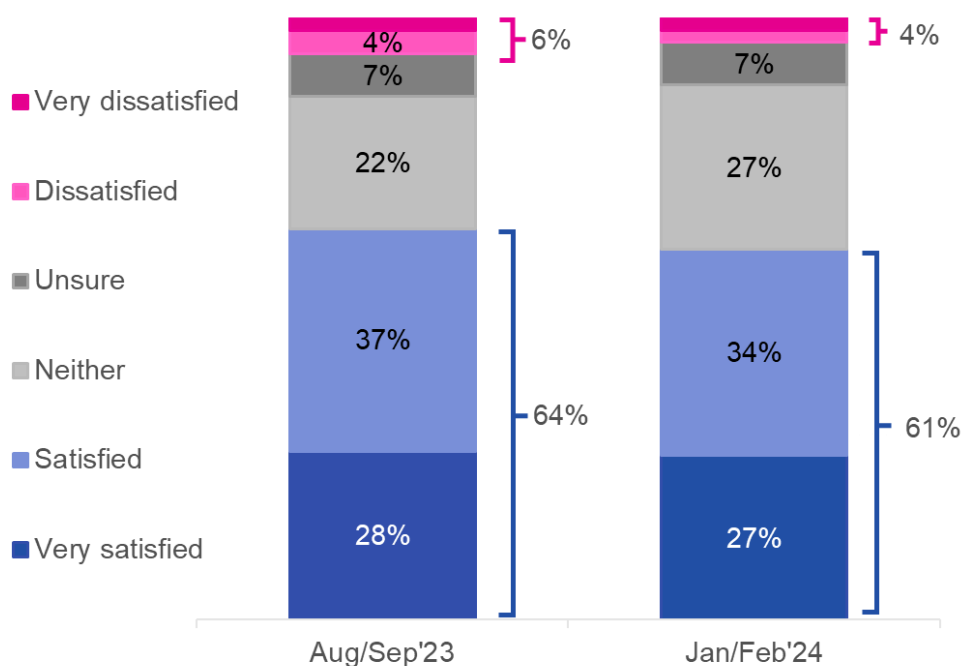
- **A third said they were on the PSR, but many eligible were not on it:** one in three (33%) households reported being on the Priority Services Register (PSR), but this was well below the 56% who were likely eligible based on the demographic information they provided and the PSR eligibility criteria.
- **Most on the PSR were satisfied:** three in five (61%) were satisfied with the services they had received by being on the PSR. Those aged 65 or over were less likely to be satisfied (54%). 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 continue to be 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 (27%). Of those receiving this type of information, the vast majority found it useful (86% in relation to eligibility and 87% in relation to the benefits).

Satisfaction with the services received by being on the PSR

A third (33%)¹⁹ of households reported being on the PSR which, as set out in wave 4 of the Consumer Impacts of Market Conditions report²⁰, is well below the proportion who are likely to be eligible (56%).

Among this group, three in five (61%) were satisfied with the services received by being on the PSR, while just 4% were dissatisfied, and a higher proportion expressing a neutral response than was the case in August/September 2023 (27% cf. 22%).

Figure 40: 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), January/February 2024 (1,266)

¹⁹ Lower than reported in the Consumer Impacts of Market Conditions Survey (CIM) as this survey reports on all respondents whereas CIM reports on all those aware of the PSR

²⁰ See Ofgem [Consumer impacts of market conditions survey - wave 4 \(July 2023\) | Ofgem](#)

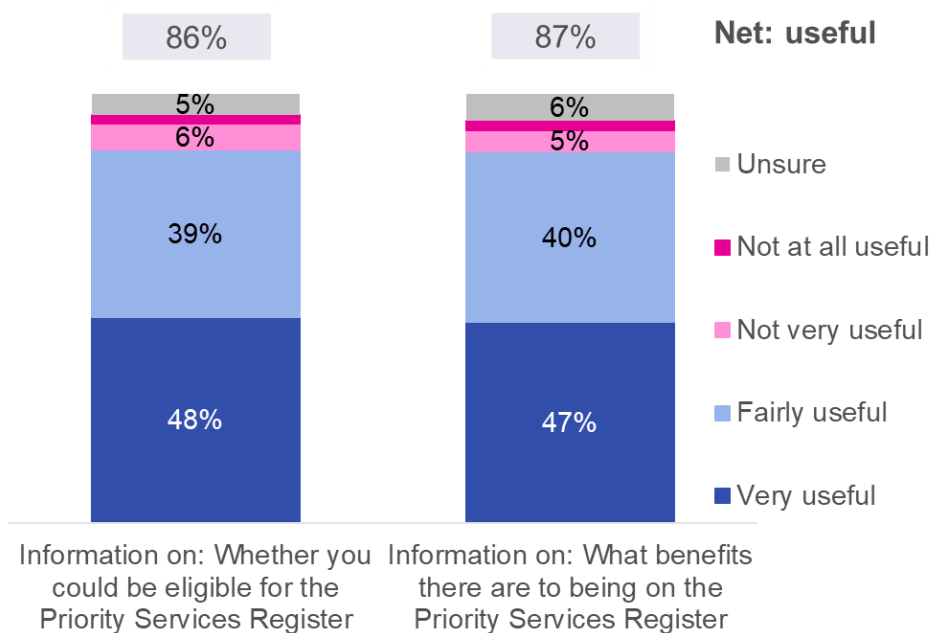
Information about PSR eligibility

Three in ten (29%) said they had received information on whether they were eligible for the PSR, and a similar proportion (27%) said they had received information about the benefits of being on the PSR.

Those with a long-term illness, physical or mental health problem or disability were more likely to report receiving information about the PSR (38% cf. average of 29%)

A large majority said they found the information they received on each of these useful (86% and 87% respectively). Those on the PSR were more likely to find both more useful than those not already on it (90% vs 80% and 90% vs 84%).

Figure 41: Usefulness of information about the PSR



D3_12/D3_13. How useful was the information you received for each of the following...

Base: received information about whether you could be eligible for the Priority Services Register August/September 2023 (1,093); January/February 2024 (1,106) / received information about what benefits there are to being on the Priority Services Register, January/February 2024 (1,031)

Data labels not shown for values below 3%

Switching suppliers and changing payment types

Overview of findings

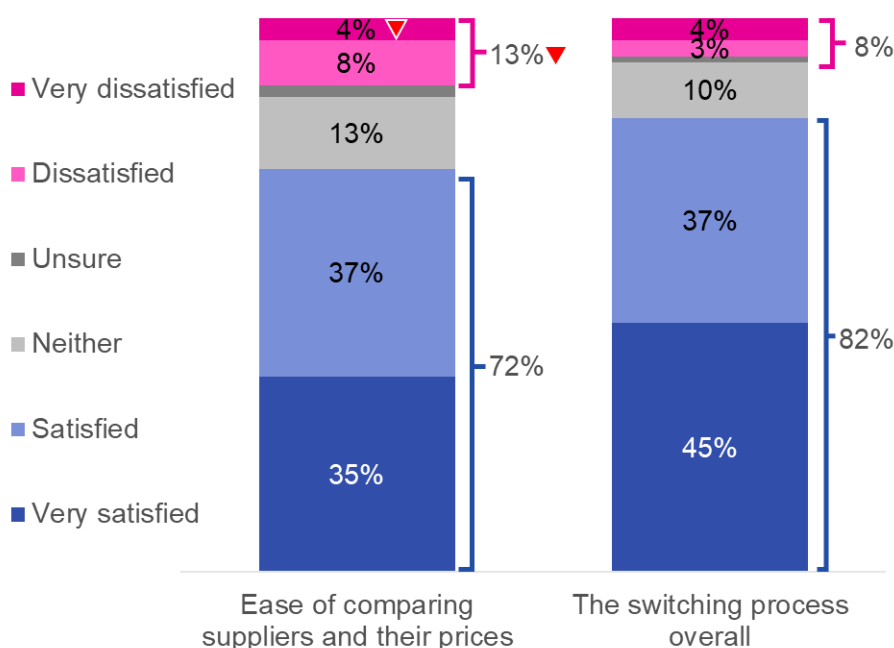
- **Satisfaction with the supplier switching process remained consistent:** respondents were generally satisfied with the overall supplier switching process (82% satisfied) but less so with the ease of comparing suppliers and their prices (72% satisfied). After a marked decline in satisfaction from late 2021 onwards, the gains made in relation to satisfaction with the process overall in August/September 2023 have been maintained in the this wave. However, although beginning to trend upwards, satisfaction with the ease of comparing suppliers and their prices remains below that seen in 2019 and 2020.
- **Fewer changes to prepayment meter were reported as involuntary, and more were informed prior to the change:** the majority (60%) requested the payment method change from standard credit to prepayment meter themselves, an increase on the 46% who reported doing so in August/September 2023. Where the supplier initiated the change to prepayment meter, only 1% said they did not agree to the change down from 7%. Four in five (80%) reported that they were informed before the change to prepayment meter happened, and a similar proportion (84%) said that the supplier discussed the appropriateness of the change, both uplifts on the 64% and 72% respectively who reported this in August/September 2023.

Satisfaction with aspects of switching supplier

Among the 7% of respondents who told us they had switched supplier, close to three quarters (72%) were satisfied with the ease of comparing suppliers and their prices, while one in ten (13%) were dissatisfied in this respect, a reduction on the 23% who were dissatisfied in August/September 2023.

In relation to the switching process overall, four in five (82%) were satisfied, and one in ten (8%) were dissatisfied, in line with August/September 2023.

Figure 42: 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:

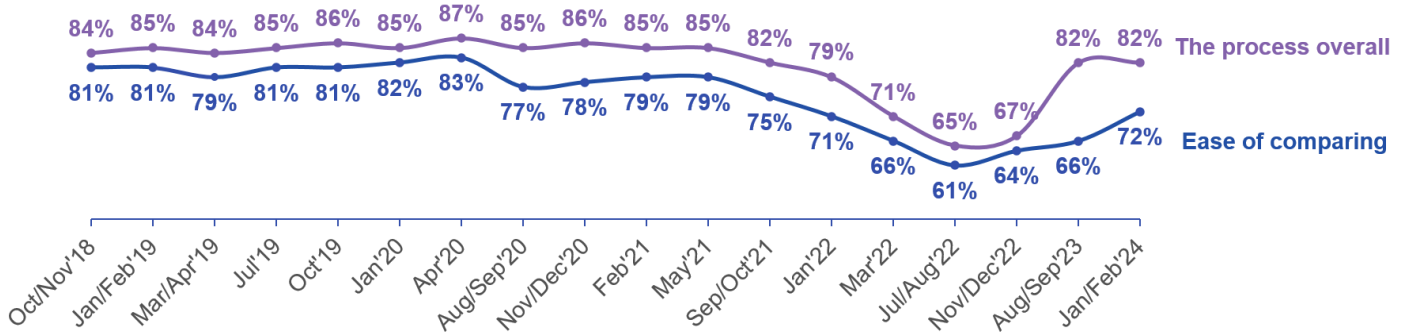
Base: those who switched energy supplier, August/September 2023 (261); January/February 2024 (282)

Data labels not shown for values below 3%

After a marked decline in satisfaction from late 2021 onwards, the gains made in relation to satisfaction with the process overall in August/September 2023 have been maintained in the latest wave.

However, although beginning to trend upwards, satisfaction with the ease of comparing suppliers and their prices remains below that seen in 2019 and 2020.

Figure 43: 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, January/February 2024 (282)

Changing payment methods: from credit meter to prepayment meter

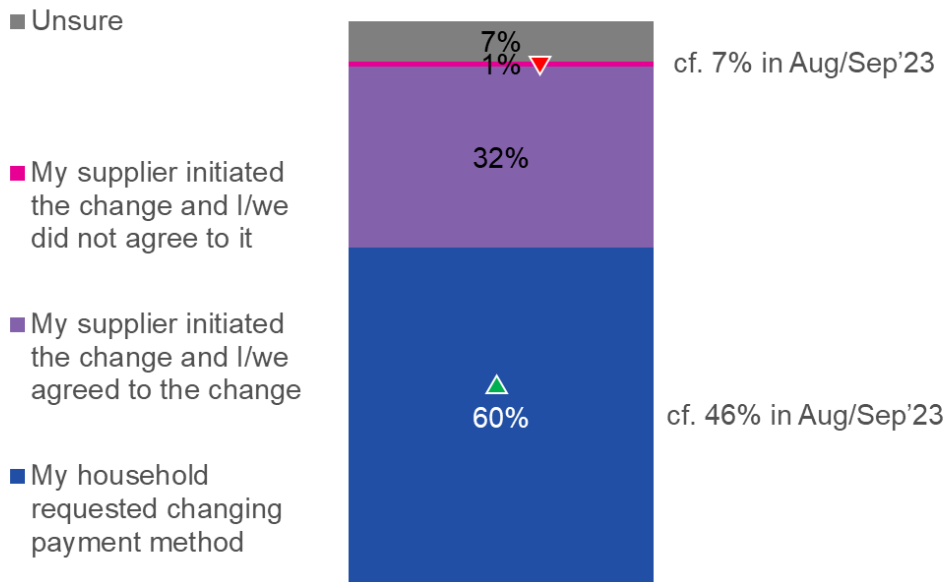
Around one in seven respondents reported having changed their payment method for electricity (14%) and for gas (13%) in the last 6 months. However, it is worth noting market data indicates that this seems artificially high. As such, this finding should be treated with caution.

The remainder of this section focuses on the 2% of consumers who told us they changed from a credit meter (i.e. standard credit or direct debit) to a prepayment meter in the last 6 months.

In three in five instances (60%), the payment change to prepayment meter from credit meter was reported as initiated by the respondent, an uplift on the 46% who reported this in August/September 2023, and a third (32%) said the supplier initiated the change but they agreed to it.

Encouragingly there has been a decrease from 7% to 1% in the proportion who claimed not to have agreed to the supplier initiating the change to prepayment meter.

Figure 45: How the change to prepayment meter was initiated



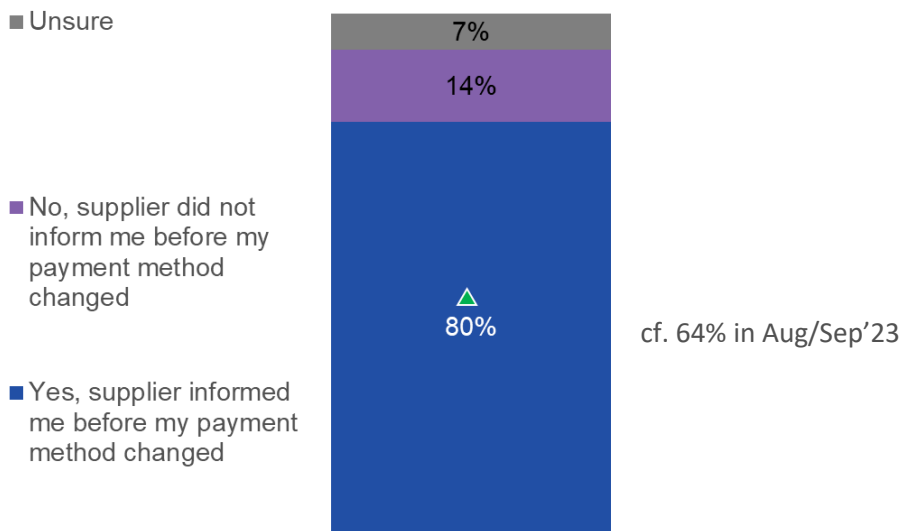
B13/B13A. When you changed payment method for gas and or electricity, did you make a request to your energy supplier to change your payment method or did they initiate the change?

Base: changed payment method from credit meter to prepayment meter for gas and/or electricity in last 6 months, January/February 2024 (78)

Whether informed prior to change to prepayment meter

Four in five (80%) reported that they had been informed before the change from credit meter to prepayment meter happened, a significant uplift on the 64% who said so in August/September 2023.

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



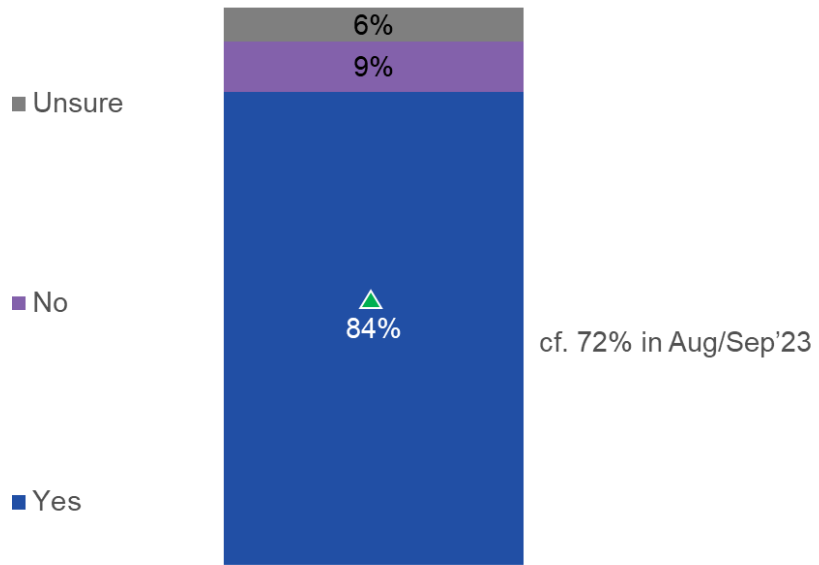
B14/B14A. When you changed payment method for electricity/gas, were you informed before the change happened?

Base: changed to prepayment meter from credit meter in last 6 months for electricity and/or gas, January/February 2024 (78)

Supplier communication about the appropriateness of the change to prepayment meter

Over four in five (84%) reported that their supplier communicated with them about whether a prepayment meter was an appropriate payment method given their circumstances, again a significant uplift on the 72% who reported this in August/September 2023.

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

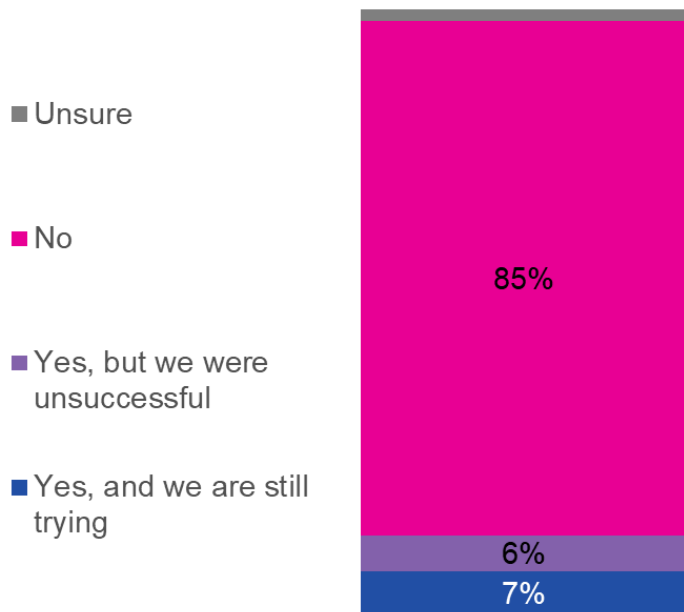


B7/B7A. When you changed to a different payment method for electricity or gas, did your energy supplier discuss or have any communication with you around whether it was an appropriate payment method given your circumstances?
 Base: changed to prepayment meter from credit meter in last 6 months for electricity and/or gas, January/February 2024 (78)

Attempts to change from prepayment method

One in ten (13%) of prepayment customers reported having tried to change payment methods in the last three months, and this included 7% who were still going through the process, and 6% who had been unsuccessful.

Figure 48: Attempts to change payment method in the last 6 months

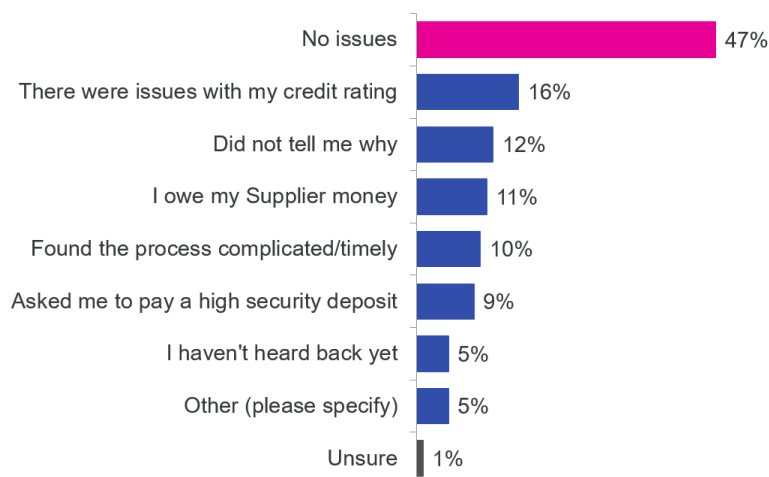


*B5I. Did you attempt to change your payment method for electricity in the last 6 months?
 Base: those who have a pre-payment meter, January/February 2024 (275). Labels under 3% not shown.*

Over half (52%) of prepayment customers who had tried but been unsuccessful in changing their payment method reported experiencing issues in this respect, most commonly issues with their credit rating (16%), owing the supplier money (11%), the complexity of the process (10%) and the size of the required security deposit (9%).

A minority (12%) reported they were not told why by their supplier when they were unsuccessful in changing their payment method.

Figure 49: Issues experienced that prevented the change in payment method



B12A/B12B. When changing/attempting to change payment type for gas/electricity in the last 6 months, did you experience any issues?

Base: Prepayment customers who tried to change their payment method for gas/electricity in the last 6 months (168).

Appendix

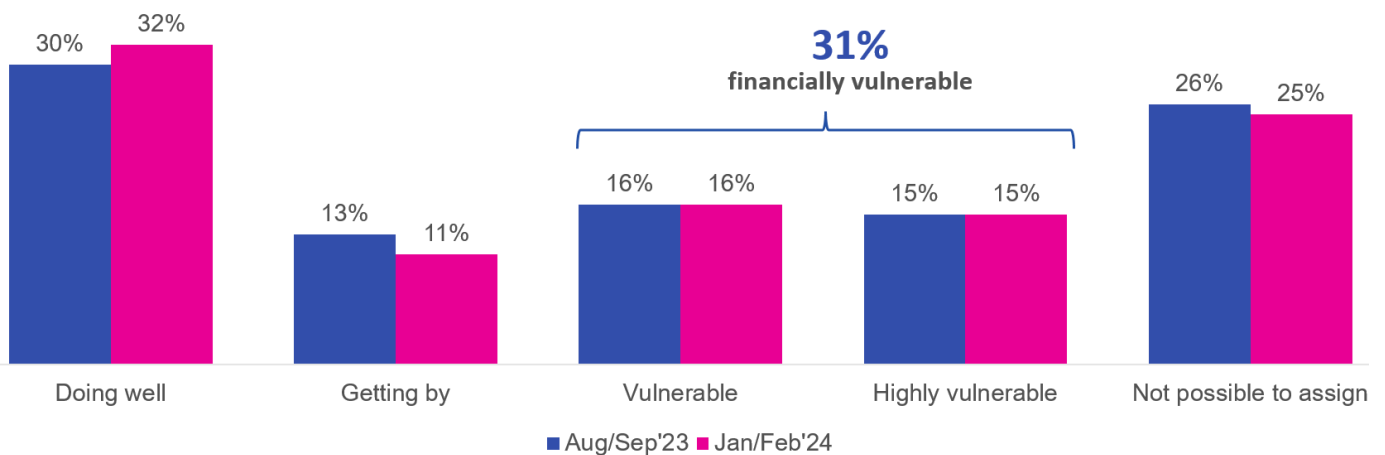
Defining the cost of living groupings

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 of £850, 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

As was the case in August/September 2023, three in ten (32%) respondents are classed as 'doing well', and a further one in ten (11%) 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 to this survey.

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); January/February 2024 (3,855)

It was not possible to classify 25% of respondents because they answered 'don't know' or 'prefer not to say' to one or more of the questions.

Key Drivers Analysis

Data for waves 17 and 18 of the Energy Consumer Satisfaction Survey (the first waves conducted by BMG) were combined to conduct the analysis, giving a strong sample of 7,597 cases to work with. The models used a binary logistic regression approach, a statistical method for predicting the likelihood of something happening, in this case, whether a customer is satisfied or not.

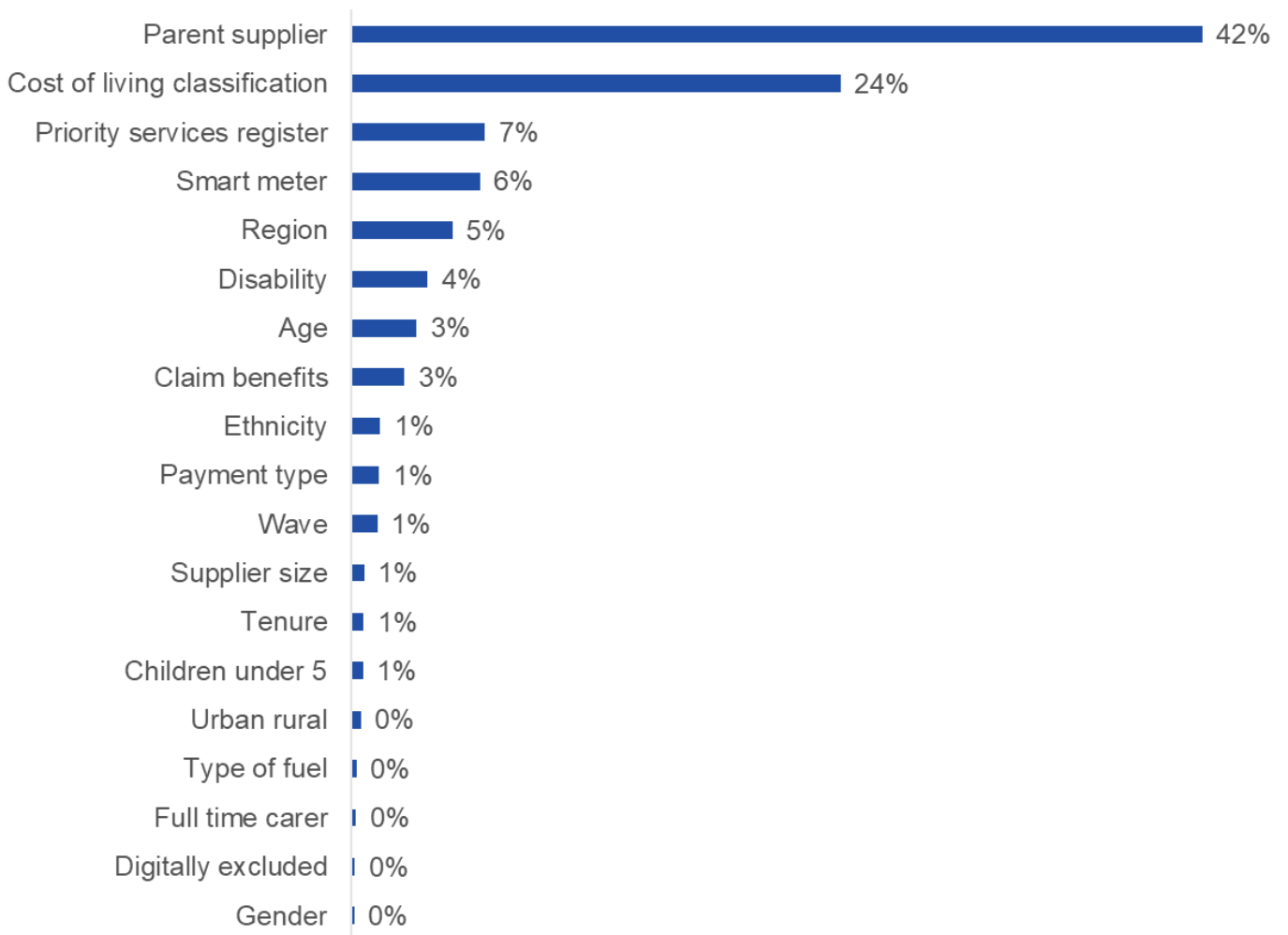
The R-squared value - a measure of the total explanatory power of the model as a percentage of the variance explained 37% of what is driving customer service. This is for the combined models with demographic, energy characteristics and performance measures included.

While a definitive benchmark for a “good” R-squared value remains elusive, higher values signify a stronger fit of the model to the data. In the realm of social sciences, Nagelkerke R-squared values ranging between approximately 20% and 40% are generally deemed good, so we can be pleased with the overall explanatory power of the final combined models.

Demographic and energy characteristics model

The demographic and energy characteristics model combine demographic factors such as age, gender, ethnicity and region with energy characteristics such as supplier, smart meter, and payment type. The full results are displayed below.

Figure 51: Relative importance scores for demographic and energy characteristics only

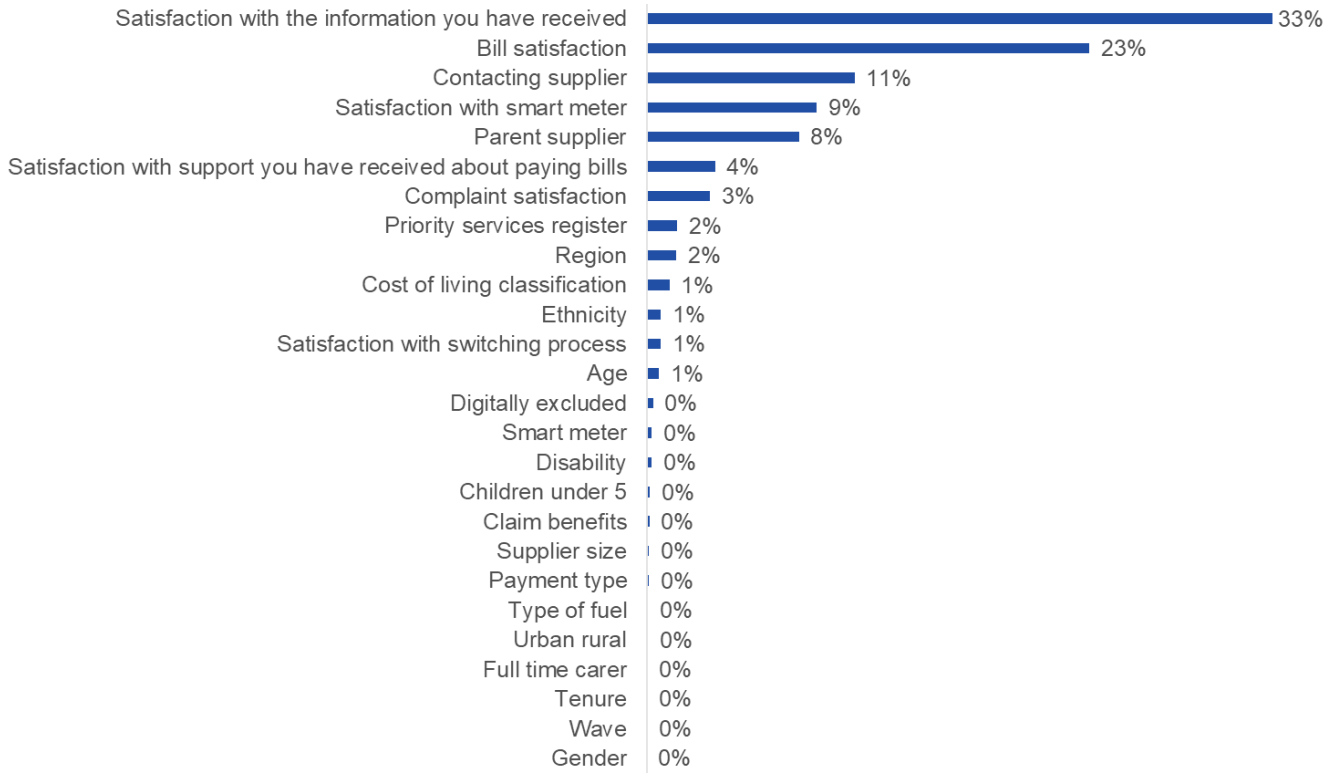


Relative importance scores for regression models for regression on A7: Overall, how satisfied or dissatisfied are you with the customer service you have received from <A3/A4 SUPPLIER>?. Base: August/September 2023 (3742); January/February 2024 (3855)

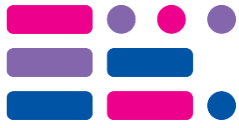
Demographic, energy characteristics and supplier performance model

The third model combines all demographic, energy and supplier performance characteristics. The full results are displayed below.

Figure 53: Relative importance scores combining supplier performance measures with energy and demographic measures



Relative importance scores for regression models for regression on A7: Overall, how satisfied or dissatisfied are you with the customer service you have received from <A3/A4 SUPPLIER>? Base: August/September 2023 (3,742); January/February 2024 (3,855)



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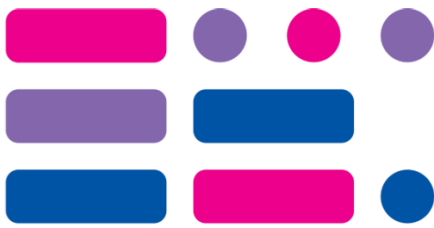
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