



Energy Consumer Satisfaction Survey

Wave 20

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Fieldwork conducted in January 2025

Prepared by BMG for Ofgem and Citizens Advice

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Ofgem Foreword

In September 2024 Ofgem announced further work on consumer standards through its Consumer Confidence work programme, which seeks to drive further improvements and culture change in customer service for consumers in the energy industry. Now, more than ever, it is important that energy suppliers deliver quality customer service for consumers, as they continue to face high energy prices and, relatedly, cost of living worries.

Research and monitoring activities play a vital role in Ofgem's engagement with energy consumers across Great Britain. By providing evidence on consumers' outcomes and experiences in the energy market, these activities help inform Ofgem's regulatory actions to support consumers.

The Energy Consumer Satisfaction Survey is a key element to helping Ofgem understand domestic energy consumers' views on the quality of service and support provided by their supplier, to help assess whether they are getting what they need and expect from energy suppliers. Launched in 2018, the survey monitors consumers' perceptions of several key performance indicators, such as satisfaction with contacting suppliers, billing, complaints handling, the information provided by suppliers, switching, support for those in need, and overall satisfaction. In doing so, the survey complements other sources of data on customer service performance in the energy market.

This report details findings from the 20th wave of the Energy Consumer Satisfaction Survey, drawing on research conducted in January 2025.

We are pleased to see satisfaction increasing but there is more to be done. We are concerned where particular groups continue to experience poorer outcomes in the market. We have seen that when things go wrong the impact can be serious, especially for the most vulnerable. In these circumstances it is only right that we set the highest of standards for our energy suppliers.

Ofgem are building on the Consumer Standards rules we put in place in winter 2023¹ with the launch of our Consumer Confidence programme² and our newly updated Vulnerability Strategy.³

Ofgem will continue to use data from the Energy Consumer Satisfaction Survey, as well as other sources of consumer insight, to monitor consumer experiences and outcomes as it begins to deliver on its ambitions as part of the Consumer Confidence work programme.

¹ [Consumer standards decision | Ofgem](#)

² [Consumer confidence: a step up in standards | Ofgem](#)

³ [Consumer Vulnerability Strategy](#)

Executive Summary

This tracking survey provides 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. It takes a mixed mode approach to data collection, using online and face-to-face interviewing. The findings for the January 2025 wave are based on 3,854 interviews with a representative sample of energy bill payers across Great Britain. This report builds on the interim report that was published following completion of fieldwork. The interim report can be found [here](#).

Consumer satisfaction with energy suppliers reached an all-time high

Overall satisfaction has increased from 78% in July 2024 to 81% this wave and is now at its highest level since tracking began in 2018.

Similarly, customer service satisfaction has risen from 71% to 74%. This puts satisfaction back in line with the peak level last recorded in early 2020 (75% in April 2020).

Both gains build on a consistent upward trend since late 2022. While earlier improvements may to some extent reflect relief from the peak prices of the energy crisis, it is striking that satisfaction has continued to rise further despite two successive increases in the price cap level.

Easing cost-of-living pressures are helping drive up satisfaction

Reported financial pressures continued to ease. The share of consumers we classified as 'doing well', based on information they tell us about debt and ability to cover unexpected expenses increased from 49% in July 2024 to 52% this wave.

This represents a notable easing of financial pressures since we started tracking this metric in August/September 2023, where the 'doing well' share was just 41%. Meanwhile, the proportion of respondents to this survey classified as 'getting by' (17% to 15%), 'financially vulnerable' (22% to 18%), and 'highly financially vulnerable' (20% to 14%) have fallen over the past 18 months.

This is particularly relevant to overall satisfaction, as there is strong evidence within this survey of a link between improving financial circumstances and how consumers feel about their suppliers.⁴ Consumers under financial strain are less satisfied, while those who report feeling financially secure report higher satisfaction. The key driver analysis for this wave will explore this further and will be released in Spring 2025.

But suppliers are also likely to be playing a role in increasing satisfaction

While easing cost-of-living pressures have certainly contributed to the record level of overall satisfaction observed, this is only part of the story. Consumers report better experiences with suppliers, with positive movement across a number of key measures:

- Contact experience has improved. An increasing share of those who contacted their supplier said they were easy to reach (rising from 70% in July 2024 to 75% this wave). There were also gains in satisfaction with the time taken to resolve queries, the ease of finding contact details, and the speed of responses.

⁴ Key driver analysis conducted in January/February 2024 data found that while the supplier the customer was with was the top factor driving satisfaction, the cost of living classification ranked second.

- Smart meter experiences are improving, with satisfaction with smart meters rising from 72% in July 2024 to 76%. This is the highest level recorded since tracking began. That said, a sizeable minority continue to report encountering issues with their smart meter (32%), down from 35% in July 2024.
- Satisfaction with billing accuracy and ease of understanding bills have improved, with both measures reaching record highs at 80% and 82% respectively.⁵
- Experiences of consumers who have fallen behind on bills have also improved, with *dissatisfaction* with the support received from their supplier dropping from 18% to 10%.
- There has been a rise in customers switching tariffs with their current supplier (up from 12% in July 2024 to 17%). Those who did so reported higher overall satisfaction with their supplier than those who did not – and their satisfaction has grown more sharply too, from 80% to 87%. This may indicate that more people are securing new deals that leave them feeling more positive about their supplier.

Encouragingly, no aspect of the supplier-customer experience has shown any signs of decline this wave. Meanwhile, some metrics have held steady since July 2024 – such as satisfaction with the Priority Services Register and complaints handling.

Though consumers continue to face some challenges

The overall picture in January 2025 is generally positive, but many customers continue to face negative experiences – and these are not evenly distributed among consumer groups. We've highlighted four key areas where challenges remain.

First, although reported financial pressures are easing, challenges are not shared equally and those experiencing financial pressures remain less satisfied (66%) than those doing well (89%).

Second, reported affordability issues remain high, with 10% of consumers still reporting they owe money to their supplier. The share of consumers reporting they are behind on bills has only dropped marginally over the last four waves, from 12% in August / September 2023, to 10% in January 2025, suggesting that debt remains a key issue – even as the broader cost-of-living picture shows signs of improvement.

Finally, despite the various improvements, many consumers report having negative experiences. For example, 47% of those who tried to contact their supplier experienced some difficulty, satisfaction with complaints handling remains relatively low at 44%, 32% reported an issue with a smart meter, and 26% experienced what they had perceived to be an unexpectedly high bill.

⁵ However, not all consumers may engage with their bills due to energy literacy. Consumer energy literacy will be explored further in the Consumer Impacts of Market Conditions report.

Background and research objectives

Background

This report, setting out results from January 2025 (wave 20), provides 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 3,854 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 consumers' experiences of contacting suppliers?
 - what is the consumer 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?**
 - what are consumers' experiences of smart meters?
 - what are the practical challenges with topping up their prepayment meter?
 - what are the experiences of services received through the Priority Services Register⁶? services from the supplier?
 - what are the levels of satisfaction with the process of switching suppliers?

⁶ Consumers can sign up to their supplier's Priority Support Register to receive a range of extra help, such as priority support in an emergency or a regular meter reading service. For more information: [Join your supplier's Priority Services Register | Ofgem](#).

Method

Timing of fieldwork

This is the fourth wave of this survey run by BMG Research. Fieldwork for this wave was conducted between the 6th and 31st of January 2025. Comparisons to the previous waves are for 10 July to 1 August 2024 (wave 19), 18 January to 10 February 2024 (wave 18) and 30 August to 18 September 2023 (wave 17).

Data collection method

Quotas were set to ensure a representative sample of the GB population of households.⁷ Results were weighted overall by age, gender, region, indices of multiple deprivation (IMD), ethnicity and payment type. The methodology is consistent with the previous three waves (waves 17, 18 and 19) and details of updates applied in wave 17 can be found in the accompanying technical report [here](#).

- The latest wave comprised 3,854 respondents in total. The data was collected through a combination of three methods:
 - 2,975 consumers took part via online interview panels to capture the digitally enabled population
 - 198 consumers participated through online river sampling to capture those who are digitally enabled but typically less present on panels⁸
 - 200 digitally excluded consumers were interviewed face-to-face.
- An additional 481 boost interviews were conducted, comprising of prepayment meter and standard credit customers and an ethnicity boost via online panel and face-to-face interviews. These customers were boosted to increase the sample size to allow for more robust estimates and analysis for these groups. Boost cases 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 January 2025 which can be downloaded [here](#).

Notes on statistical significance

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

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

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

⁷ 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 which can be downloaded here: [Energy Consumer Satisfaction Survey January 2025 \(ofgem.gov.uk\)](#)

⁸ 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.

With a sample size of 3,854 we are looking at a margin of error of $\pm 1.60\%$ at the 95% confidence level⁹.

⁹ 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

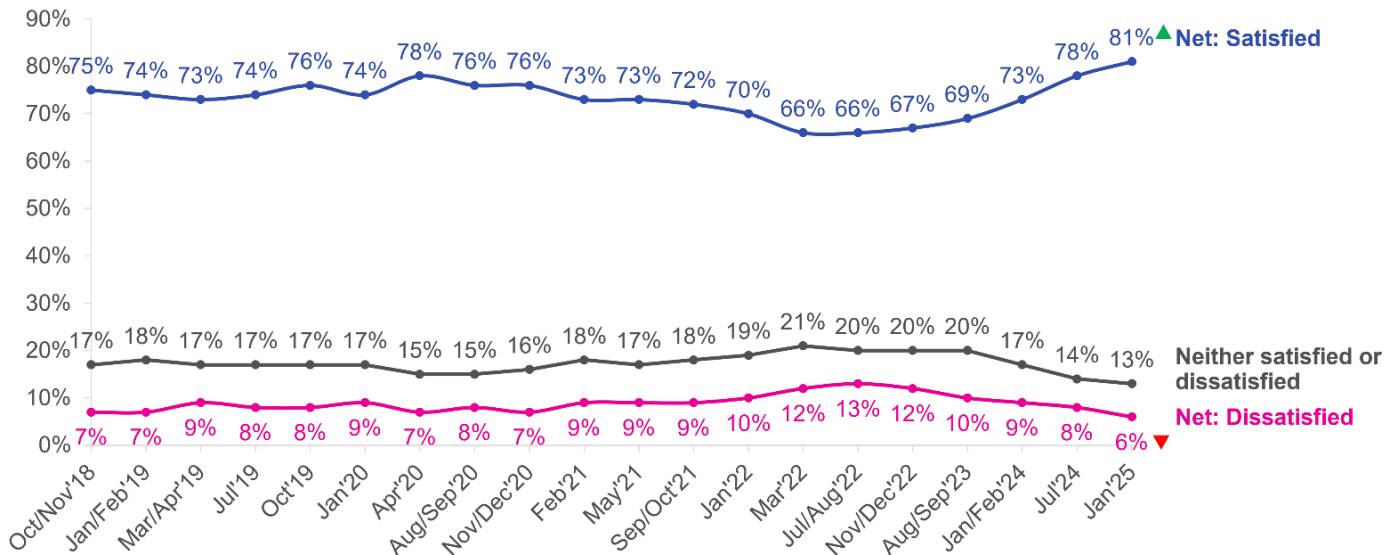
- **Overall satisfaction has reached its highest level since tracking began:** satisfaction increased from 78% to 81%, continuing the upward trend observed since August/September 2023.
- **Satisfaction gaps between payment methods continue to narrow:** direct debit customers continue to report high overall satisfaction with their supplier, now at 82% but satisfaction is lower at 76% for standard credit customers. Over time, the gap between Standard Credit and other payment methods has continued to close.
- **Some groups have higher dissatisfaction:** beyond payment type, several sub-groups of consumers were more dissatisfied overall than the total, including those renting, carers and those living with a disability. These patterns likely reflect, in part, the greater vulnerability to cost of living pressures among these groups (as these groups were more likely to be financially vulnerable, which we know from previous key driver analysis is a key indicator of satisfaction).
- **Price continues to be the main reason cited for satisfaction and dissatisfaction:** Affordable bills are the main reason for satisfaction among those satisfied, but for those neither satisfied or dissatisfied or those dissatisfied overall, prices being too expensive is the main reason for their satisfaction rating.

Overall satisfaction

Overall satisfaction has increased further from 78% in July 2024 to 81% in the latest wave, the highest level since tracking began. This continues the upward trend that began in November/December 2022.

The proportion of consumers reporting dissatisfaction has also decreased, from 8% in July 2024 to 6% in the latest wave, the lowest level of dissatisfaction since tracking began. Levels of those neither satisfied nor dissatisfied with their supplier has remained the same and is at the lowest level recorded (13%).

Figure 1: Overall satisfaction with supplier over time



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

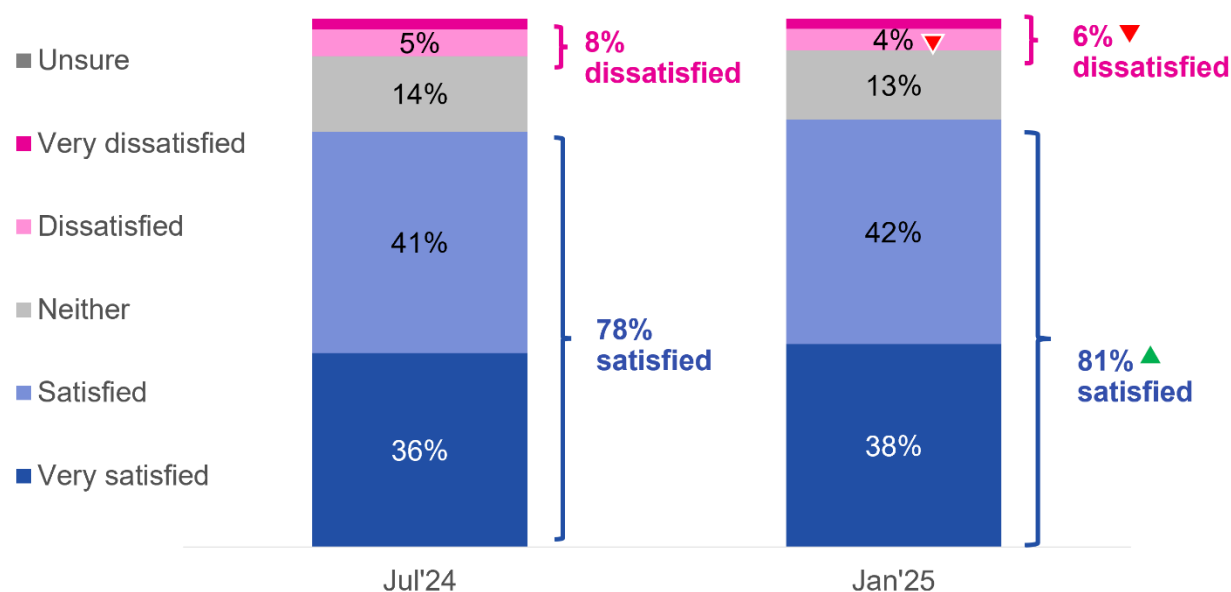
Base: All respondents: Jan'25 (3,854), Jul'24 (3,750), Jan/Feb'24 (3,855), Aug/Sep'23 (3,742)

Unsure and prefer not to say are not shown. Intervals between surveys vary. Significance is marked versus the previous wave only.

As was the case in the previous wave, more of those classified as satisfied overall said they were 'satisfied' (42% of total respondents) rather than 'very satisfied' (38% of total respondents), and while neither were significantly higher than the previous wave, in combination the proportion satisfied overall was significantly higher than was the case in July 2024 (81% cf. 78%).

The increase in overall satisfaction corresponds with a decrease in consumers who said they were dissatisfied. (6% cf. 8% in July 2024).

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: Jan'25 (3,854), Jul'24 (3,750)

Data labels not shown for values below 3%.

Previously we have seen overall satisfaction with energy suppliers track the overall trends in the energy price cap level. As the price cap increased, we saw a drop in overall satisfaction, and the reverse when the price cap started to lower again.

However, in the latest wave, satisfaction has increased despite the price cap rising from £1,717 in July 2024 to £1,738 in January 2025. Some possible reasons for why satisfaction has increased while the price cap has also increased include:

- financial circumstances improving among customers
- an increase in customers reportedly switching to fixed tariffs with their current supplier. Customers who have done so are increasingly likely to be satisfied with their supplier (overall satisfaction for those that switched tariff with the same supplier was 87% compared to 83% for those that had switched supplier and 79% for those that had not switched)
- improving experiences in a range of supplier-customer touchpoints, including billing, contact, and smart meters¹⁰

These reasons will be explored in more detail in the relevant sections of this report.

While satisfaction has increased to the highest level recorded in this survey, 6% remain dissatisfied and there are some groups who were more likely to be dissatisfied than the average. Around one in ten of those that are in social (10%) or private (8%) rented properties and those with a disability (8%) were more likely to be dissatisfied.

¹⁰ The key drivers analysis report conducted in January 2025 explores how broader sentiment about the cost of living impacts customer satisfaction

However, these groups were also those that were more likely to be financially vulnerable, which we know from previous key driver analysis is a key indicator of satisfaction.¹¹

Full time carers were also more likely than average to be dissatisfied (9%). This group were more likely to be in receipt of benefits, earning less than £20,000 and to have fallen behind/ran out of credit for affordability reasons.

This could suggest that while certain subgroups are more likely to be dissatisfied, it is likely that their underlying financial circumstances are playing a bigger role in their dissatisfaction.

Financial vulnerability is explored in more detail in section 2.

¹¹ Report on the key driver analysis conducted in January/February 2024 found [here](#).

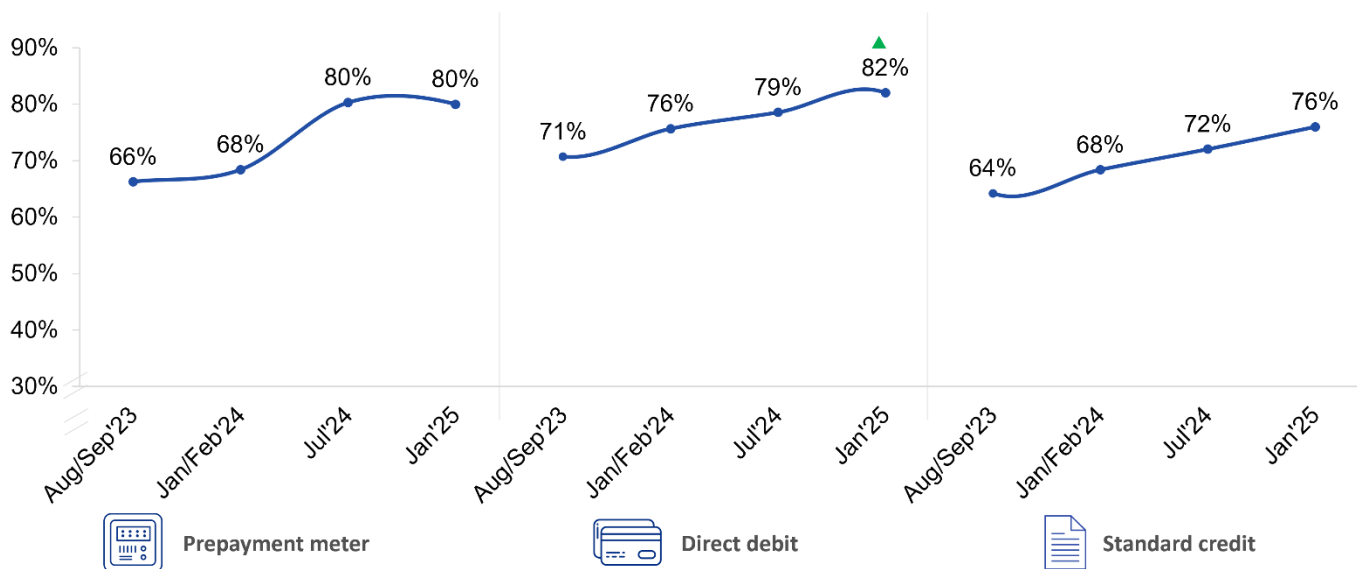
Satisfaction by payment type

Satisfaction among those paying by direct debit has increased to 82% and is once again the payment type with the highest satisfaction.

Satisfaction among those paying by Standard Credit remains the lowest overall and the only group below the average of 81%. While the increase in satisfaction among Standard Credit customers from 72% to 76% is not statistically significant since the last wave, it reflects a longer-term upward trend and as a result, the gap between payment types has narrowed.

After a sharp rise from 68% to 80% in July 2024, satisfaction among prepayment meter users has held steady at 80%.

Figure 3: Overall satisfaction by payment type over time (% satisfied)



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

Base: Pre-payment meter (Jan'25: 725; Jul'24: 699; Jan/Feb'24: 634; Aug/Sep'23: 778), Direct debit (Jan'25: 2,610; Jul'24: 2,488; Jan/Feb'24: 2,732; Aug/Sep'23: 2,467), Standard credit (Jan'25: 631; Jul'24: 649; Jan/Feb'24: 560; Aug/Sep'23: 585). Significance is marked versus the previous wave only.

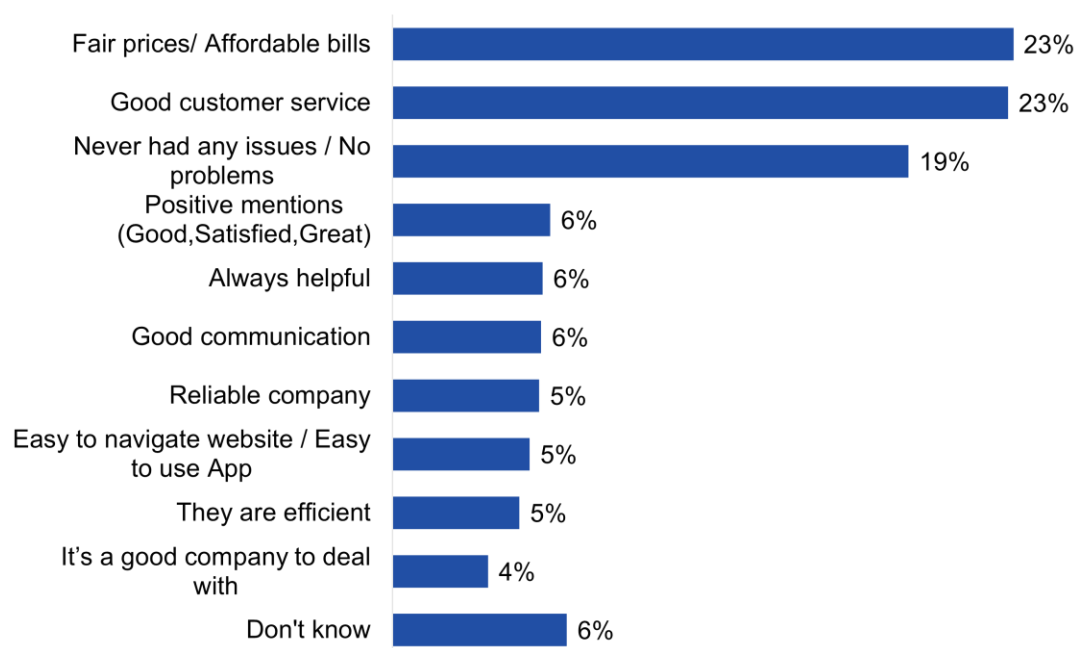
Reasons for level of satisfaction

Reasons for satisfaction

Among the 81% satisfied overall, the most cited reasons for satisfaction were fair pricing/affordable bills, mentioned by 23%, a decline on the 26% who mentioned this in July 2024, followed by good customer service (23%).

One in five (19%) expressed a passive form of satisfaction, stating they were satisfied simply because they had not encountered any issues.

Figure 4: Reasons for satisfaction



A6: [CODED] Why are you with [supplier] as your supplier of <FUEL TYPE>?

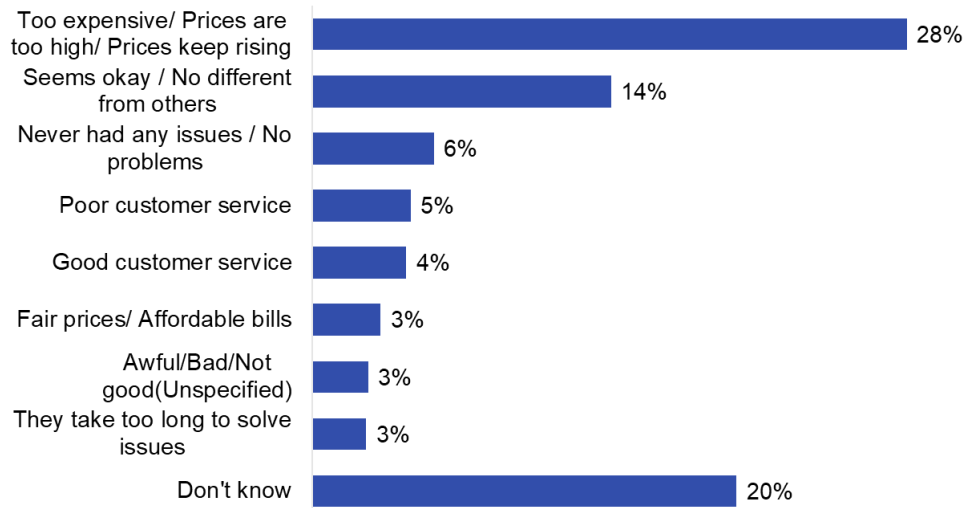
Base: Satisfied with overall service Jan'25 (3,087). Codes below 4% not shown.

Reasons for being neither satisfied nor dissatisfied

For the 13% neither satisfied nor dissatisfied, high costs were the main factor, mentioned by 28%. Customers also highlighted a passive relationship that they have with their suppliers, with 14% saying they 'seem ok'/'no different from others' and 6% saying they never had any issues with their supplier.

Customer service was mixed for those neither satisfied nor dissatisfied, with 4% reporting it was good and 5% reporting it was bad.

Figure 5: Reasons for being neither satisfied nor dissatisfied



A6: [CODED] Why are you neither satisfied nor dissatisfied with [supplier] as your supplier of <FUEL TYPE>?

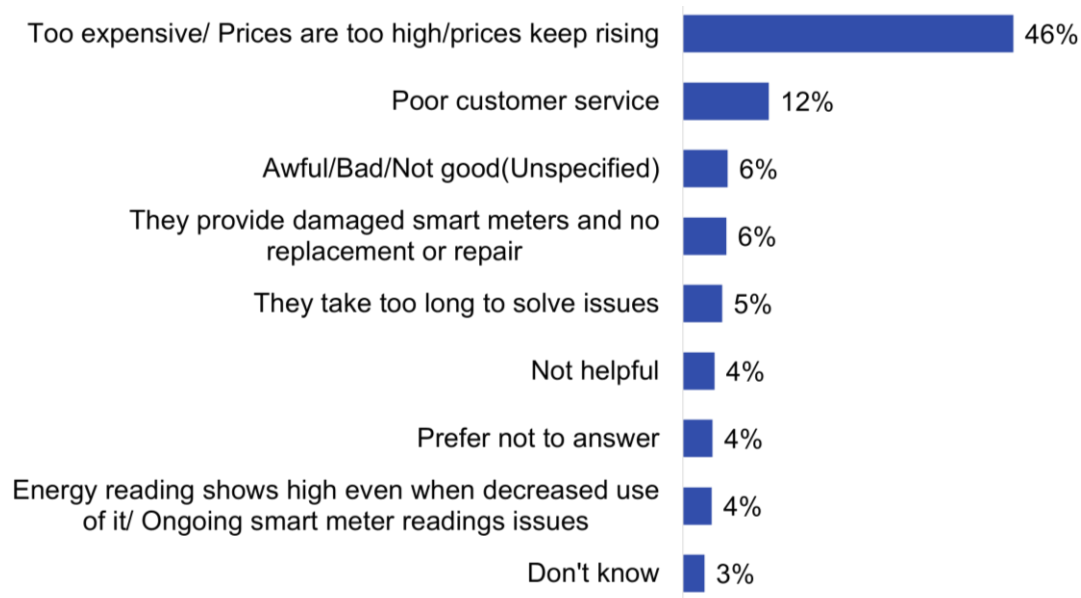
Base: Neither satisfied nor dissatisfied with overall service: Jan'25 (506). Question newly asked this wave. Codes below 3% not shown.

Reasons for dissatisfaction

Among the 6% who were dissatisfied with their supplier, close to half (46%) said this was because of the prices. Poor customer service was the second most mentioned reason at 12%.

Other factors were mentioned by around one in twenty or fewer.

Figure 6: Reasons for dissatisfaction



A6: [CODED] Why are you dissatisfied with [supplier] as your supplier of <FUEL TYPE>?

Base: Dissatisfied with overall service: Jan'25 (236). Codes below 3% not shown.

Financial pressures and value for money

Financial pressures

Overview of findings

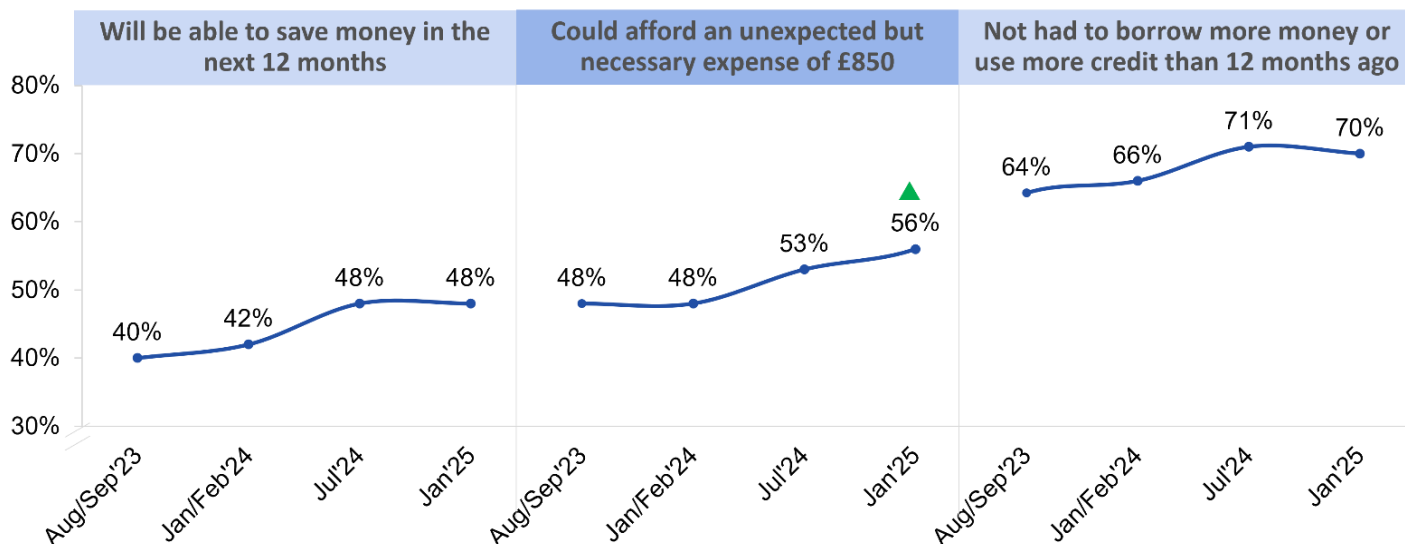
- **Reported financial pressures have eased:** there has been a consistent increase in the proportion reporting they are 'doing well' in this survey's financial vulnerability classification. There is also a long-term decline in those classified as 'getting by', 'vulnerable' and 'highly vulnerable'. This will be helping the increase in satisfaction as the key drivers analysis shows financial vulnerability classification is a key driver of customer service satisfaction.
- **Financial vulnerability continues to shape satisfaction:** While satisfaction has improved across all four financial vulnerability groups since August/September 2023, vulnerability to cost of living pressures continues to shape satisfaction. The gap between those 'doing well' and those 'highly vulnerable' has narrowed — from 27 to 23 percentage points — but remains wide.
- **Easing reported financial pressures are likely to have helped drive up satisfaction:** the increase in overall satisfaction has coincided with an increase in the proportion classified as 'doing well' in terms of financial vulnerability, identified by key driver analysis as the second most important driver of satisfaction. This group have been consistently more satisfied over time and saw the greatest increase in satisfaction this wave.

Financial circumstances

Overall, more consumers are defined as ‘doing well’ financially as consumers’ financial circumstances have improved over time. Close to half (48%) reported being able to save money in the next twelve months, and seven in ten (70%) had not had to borrow more money or use more credit than twelve months ago.

There has also been an increase in the proportion who felt they could afford an unexpected but necessary expense of £850, from 53% in July 2024 to 56% in the latest wave.

Figure 7: Changes in financial circumstances over time



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 (3,854)

Financial vulnerability classification groups

The financial vulnerability classification groups used in this report are based on consumers' ability to save in the next 12 months, ability to afford an unexpected but necessary expense of £850 and whether they had to borrow more/use more credit than 12 months ago (as outlined in Figure 7 above). More information about how these are classified is available in the appendix.

The proportion of consumers classified as 'doing well' in terms of the financial vulnerability classification groups increased from 43% in January/February 2024 to 49% in July 2024 and to 52% in the latest wave.

Additionally, while not significant against July'24, there has been a long-term decline in the proportion of consumers classified as 'getting by', 'vulnerable' and 'highly vulnerable'.

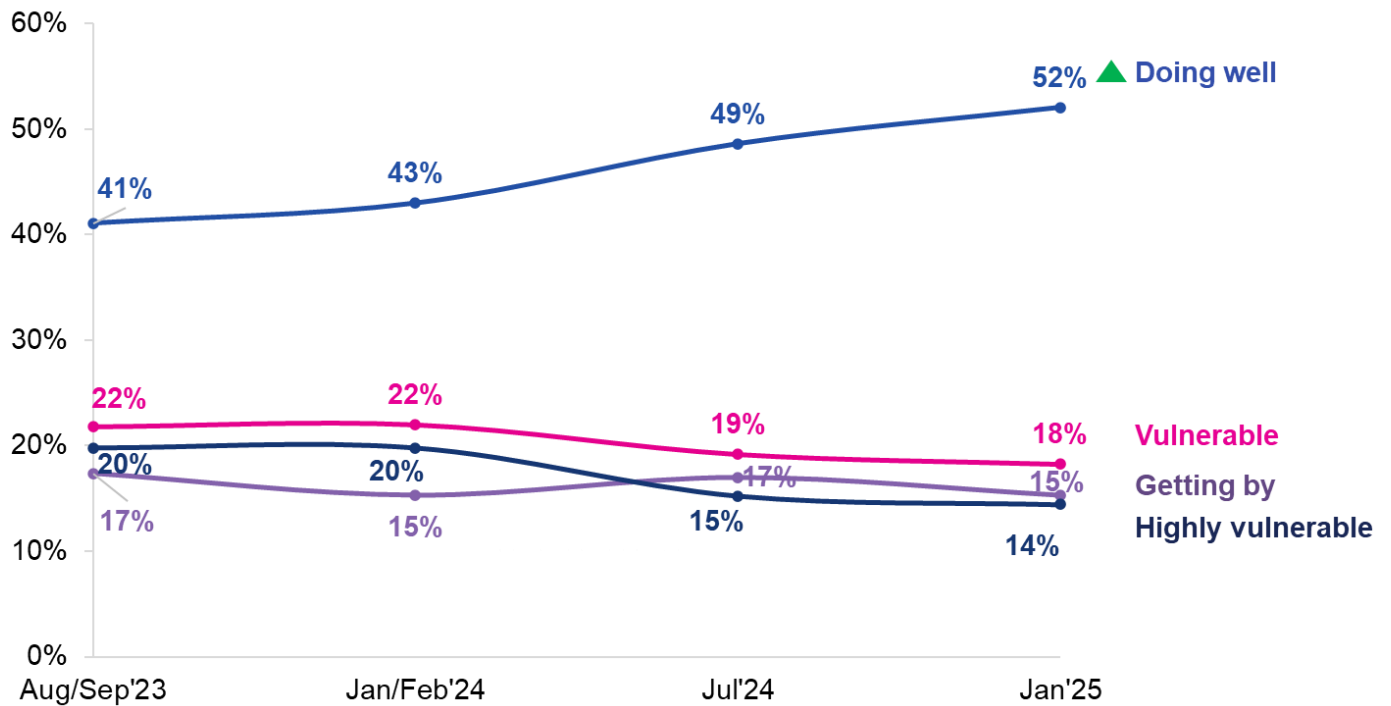
Key Driver Analysis undertaken on the January/February 2024 wave identified these four financial vulnerability groups (as defined in the appendix) as the second most important driver of customer service satisfaction, accounting for 24% of customer service satisfaction, and exceeded only by parent supplier, which accounted for 42%. Other factors accounted for $\leq 7\%$. This means that respondents reported financial circumstances play a key role in driving levels of customer service satisfaction.¹²

Accordingly, the improvement in consumers' financial circumstances is likely driving up overall satisfaction.¹³

¹² Relative Importance Scores explain the specific predictive power of each independent variable within a model: The relative importance of each independent variable in the logistic regression model was assessed by examining how much each one contributes to explaining the overall explanatory power of the model. This is expressed as a percentage - for instance, a 6% score for age means it accounts for 6% of the model's overall predictive power.

¹³ Customer service satisfaction and overall satisfaction are highly correlated so we can apply the model to overall satisfaction

Figure 8: Financial vulnerability classification groups over time¹⁴



Derived variable based following questions. 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 that did not decline to answer any of the classification questions: Jan'25 (2,920), Jul'24 (2,812), Jan/Feb'24 (2,876), Aug/Sep'23 (2,771). Significance is marked versus the previous wave only.

¹⁴ It was not possible to classify one in four at each wave as they provided a 'don't know' or 'prefer not to say' response to one or more question.

Overall satisfaction by financial vulnerability classification groups

Those 'doing well' financially are the most likely to be satisfied overall (89% - significantly higher than the other groups), followed by those 'getting by' (80%), those 'vulnerable' (72%) and those 'highly vulnerable' (66%).

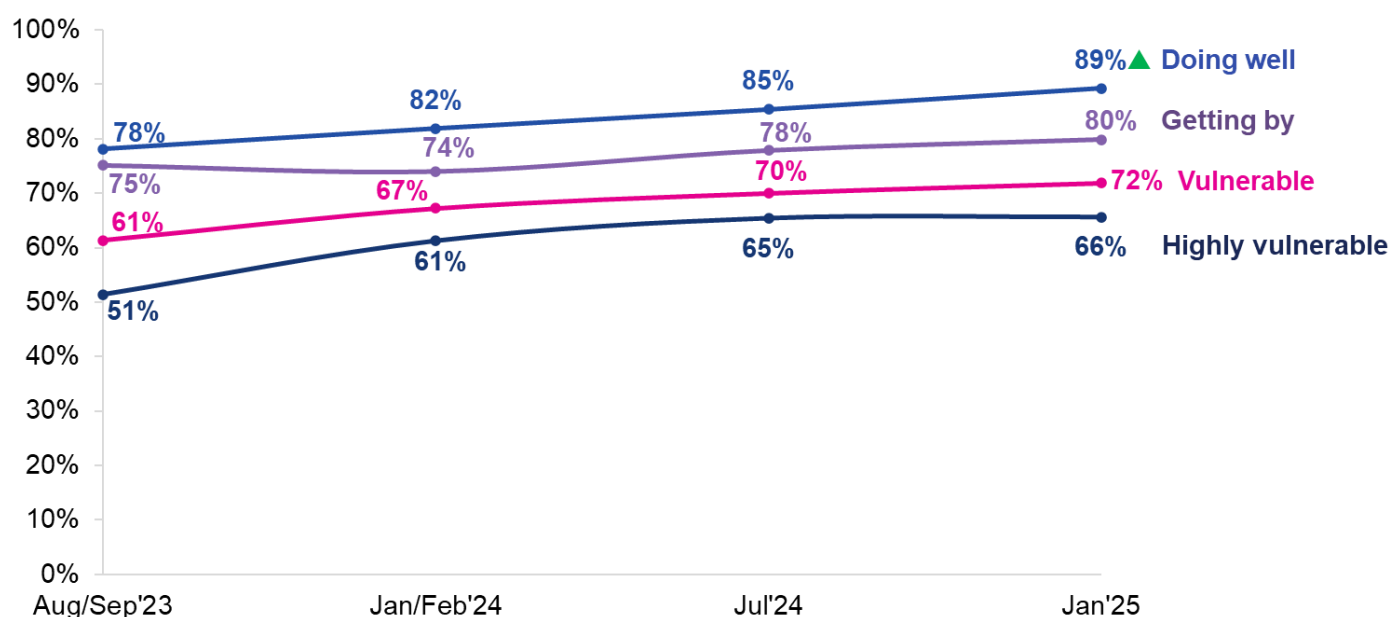
Those 'doing well' financially have seen an increase in satisfaction, from 85% in July 2024 to 89% in the latest wave, as well as a longer-term increase since 78% in August/September 2023.

While wave on wave differences are not significant for the other financial classification groups due to smaller base sizes, all financial classification groups have seen a long-term increase in satisfaction. Satisfaction among those classified as 'getting by' has risen from 75% in August/September 2023 to 80% in the latest wave and among those classified as 'vulnerable' it has risen from 61% to 72%. Those classified as 'highly vulnerable' have seen the largest increase from 51% to 66%.

Nevertheless, it should be noted that those classified as 'highly vulnerable' remain the least satisfied and indicates that more could be done to support these consumers. Those who are highly financially vulnerable may be less satisfied because:

- they are more likely to experience shock bills
- they encounter more issues, such as needing help with paying their energy bills, and are more likely to have contacted or tried to contact their supplier
- they report lower satisfaction with billing, information, smart meters, contact and customer service .

Figure 9: Overall satisfaction by financial vulnerability measure (% satisfied)



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

Base: Jan'25: Doing well (1472), Getting by (426), Vulnerable (575), Highly vulnerable (447)

Value for money

Overview of findings

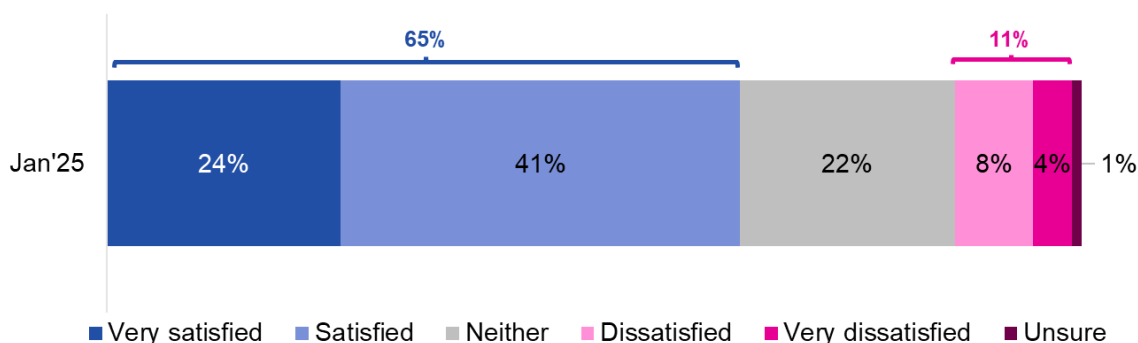
- **Two in three (65%) were satisfied with the value for money offered by their supplier:** this was lower than the proportion satisfied overall (81%) and shows some customers were satisfied overall despite not being satisfied with value for money offered by their supplier.

Value for money rating

Asked for the first time in this wave, two in three (65%) said they were satisfied with the value for money offered by their supplier, compared to 81% who said that they were satisfied with their supplier overall. This suggests there are some consumers that are satisfied overall, despite not being satisfied with the value for money their supplier provides.

A greater proportion expressed ambivalence with regard to value for money, with 22% saying they were neither satisfied nor dissatisfied¹⁵, as compared to 13% who said this in relation to overall satisfaction, although dissatisfaction in this respect was also somewhat higher (11% compared to 6%).

Figure 10: Satisfaction with value for money offered by supplier



A8B: How satisfied or dissatisfied are you with the value for money [supplier] provides?

Base: All respondents (3,854)

Those who report the lowest satisfaction with value for money tend to be the same as those least satisfied overall (brackets indicate level of those satisfied with value for money in each subgroup):

- fallen behind/ran out of credit for affordability reasons (53%)
- highly financially vulnerable (53%)
- in Scotland (55%)
- aged 50-64 (56%)
- renting (social housing) (58%)
- has a disability (59%)
- digitally excluded (60%)

¹⁵ Satisfaction with value for money provided by supplier is a question open for interpretation, so some of those saying 'neither satisfied not dissatisfied' may have selected it as they are unsure how to measure their value for money.

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

Overall customer service experience

Overview of findings

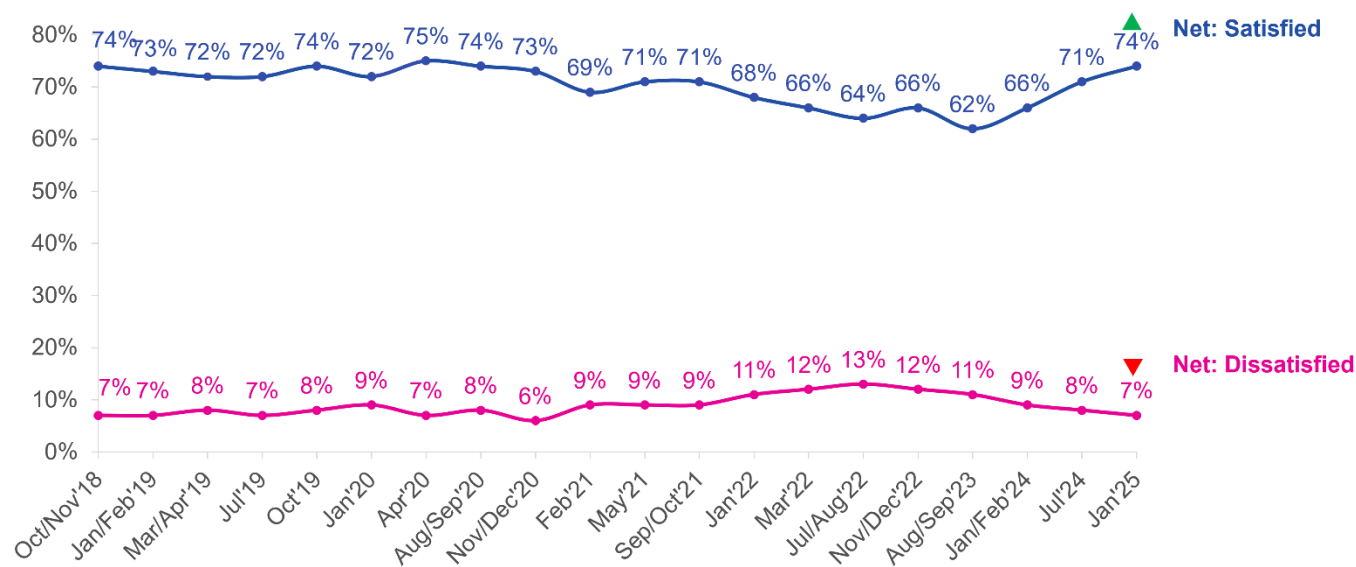
- **Satisfaction with customer service has continued to improve:** as with overall satisfaction, satisfaction with customer service has continued to improve from 71% to 74%, placing it just 1% below the peak of 75% in April 2020.
- **Customer service satisfaction has improved across all financial vulnerability groups:** those classified as 'doing well' financially remain the most satisfied and have seen the greatest improvement since the previous wave. Over the long-term, the 'highly financially vulnerable' group have experienced the most significant improvements, becoming more aligned with the financially 'vulnerable' and 'getting by' groups.
- **Differences by payment method no longer persist:** increases in overall satisfaction with customer service among those who pay by direct debit and standard credit mean that satisfaction in this respect is now consistent across all payment types, with around three in four customers being satisfied in each payment method.

Satisfaction with customer service

Satisfaction with customer service has continued to improve from 62% in August/September 2023 to 74% in the latest wave, placing it within 1 percentage point of the peak of 75% recorded in April 2020.

Paired with this, overall dissatisfaction has continued to decline, and at 7% now stands at its lowest level since recorded in November/December 2020.

Figure 11: Overall satisfaction with customer service over time



A7. Overall, how satisfied or dissatisfied are you with the customer service you have received from [supplier].

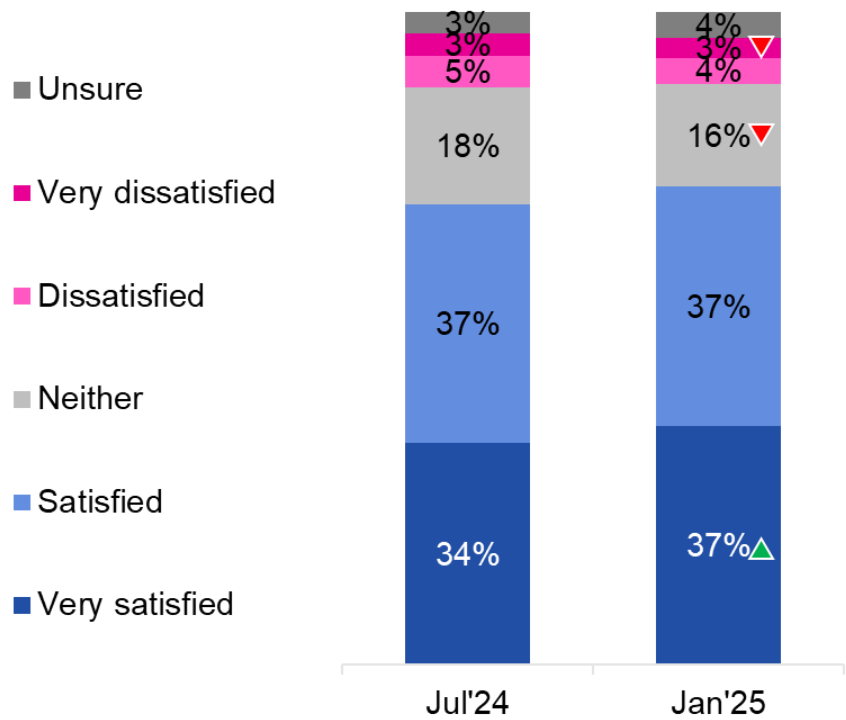
Base: All respondents: Jan'25 (3,854), Jul'24 (3,750). Intervals between surveys vary. Significance is marked versus the previous wave only.

Those with the lowest satisfaction with customer service tend to be the same as those who report low levels of overall satisfaction (brackets indicate level of those satisfied with customer service in each subgroup):

- highly vulnerable financially (63%)
- aged 50-64 (66%)
- in Scotland (67%)
- renting (social housing) (69%)
- has a disability (69%)
- digitally excluded (69%)

The increase in satisfaction with customer service was driven by an increase in those ‘very satisfied’, from 34% to 37%, and a decrease in those ‘neither satisfied nor dissatisfied’, from 18% to 16% this wave, and those very dissatisfied.

Figure 12: Overall satisfaction with customer service

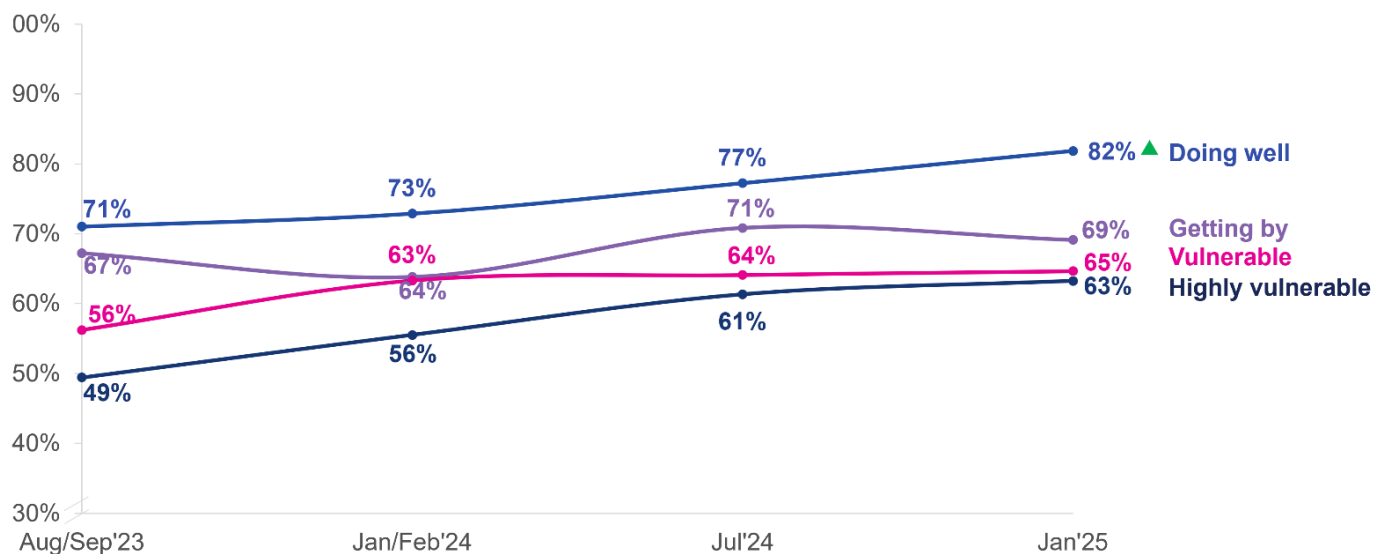


A7. Overall, how satisfied or dissatisfied are you with the customer service you have received from [supplier]?
Base: all respondents: Jan'25 (3,854), Jul'24 (3,750)

As with overall satisfaction, those classified as ‘doing well’ financially saw the greatest increase in customer service satisfaction compared to July 2024 (82% cf. 77%), with those classified as being financially vulnerable showing a longer-term increase (from 56% in August/September 2023 to 65% in the latest wave).

Importantly, those classified as ‘highly vulnerable’ have seen the greatest longer-term increase of all the four groups, from 49% in August/September 2023 to 63% in the latest wave, placing this group more in line with those classified as ‘vulnerable’ or ‘getting by’ than has been the case previously.

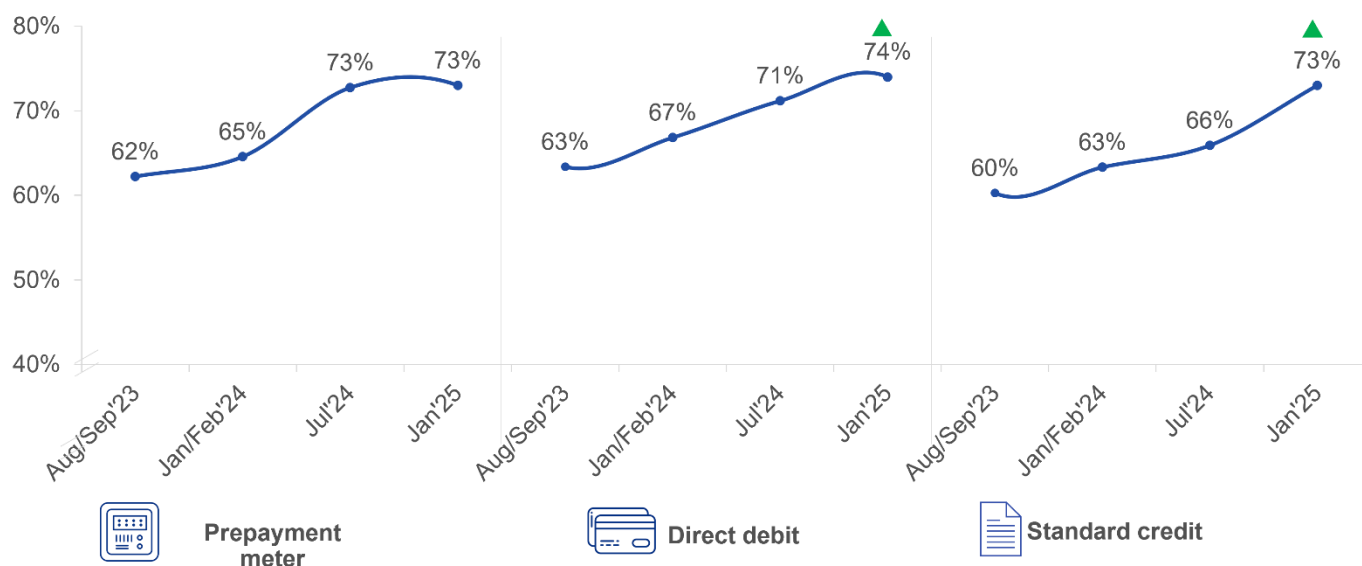
Figure 13: Overall satisfaction with customer service by financial vulnerability measure (% satisfied)



A7. Overall, how satisfied or dissatisfied are you with the customer service you have received from [supplier]?
 Base: Doing well (1,472), Getting by (426), Vulnerable (575), Highly vulnerable (447)

Satisfaction with customer service has improved for direct debit (71% to 74%) and standard credit (66% to 73%) customers, meaning satisfaction across all payment types are more consistent with each other compared to previous waves. However, *overall* satisfaction among those paying by standard credit remains below average (76% cf. 81% for total sample).

Figure 14: Overall satisfaction with customer service by payment type over time (% satisfied)



A7. Overall, how satisfied or dissatisfied are you with the customer service you have received from [supplier]
 Base: Prepayment meter (Jan'25 = 725, Jul'24 = 699, Jan/Feb'24 = 634, Aug/Sep'23 = 778), Direct Debit (Jan'25 = 2,610, Jul'24 = 2,488, Jan/Feb'24 = 2,732, Aug/Sep'23 = 2,467), Standard credit (Jan'25 = 631, Jul'24 = 649, Jan/Feb'24 = 560, Aug/Sep'23 = 585) Significance is marked versus the previous wave only.

Reasons for customer service satisfaction or dissatisfaction

The main reason provided for customer service satisfaction or neutrality was that suppliers are always helpful/available, mentioned by 22%. Around one in ten mentioned quick responses (12%), good customer service (9%), and having no issues (8%).

Respondents' verbatim:

- *"Their responsiveness and the ability to solve a complaint almost immediately"*
- *"Their customer service team is very responsive and helpful and always available to assist with concerns"*
- *"I've contacted them with an issue regarding my smart meter via email and received a response fairly quickly, and they were able to resolve it quickly"*

Figure 15: Reasons for customer service satisfaction or neutrality



A6a. Why are you [satisfied or neither satisfied or dissatisfied] with the customer service you have received from [supplier]?

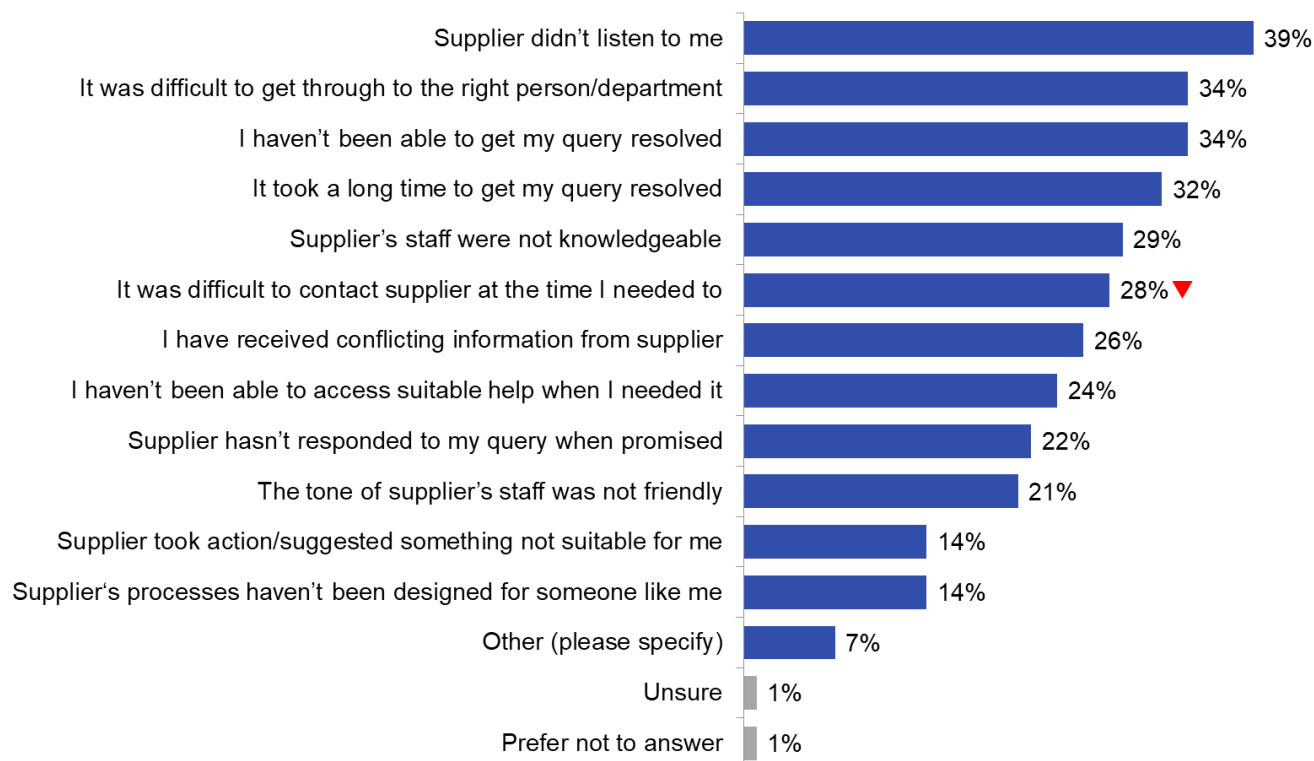
Base: satisfied or neither satisfied nor dissatisfied with customer service (3,440)

Note: new question for this wave.

In contrast, the top reasons cited for customer service dissatisfaction were that the supplier did not listen to them (39%), that it was difficult to get through to the right person (34%), a lack of resolution (34%), and it taking a long time to resolve (32%).

While 28% of those dissatisfied mentioned that it was difficult to contact their supplier at the time they needed to, this represents a significant decline on the past three waves (37% in August/September 2023, 42% in January/February 2024 and 38% in July 2024).

Figure 16: 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, Jan'25 (256)

Views on billing

Overview of findings

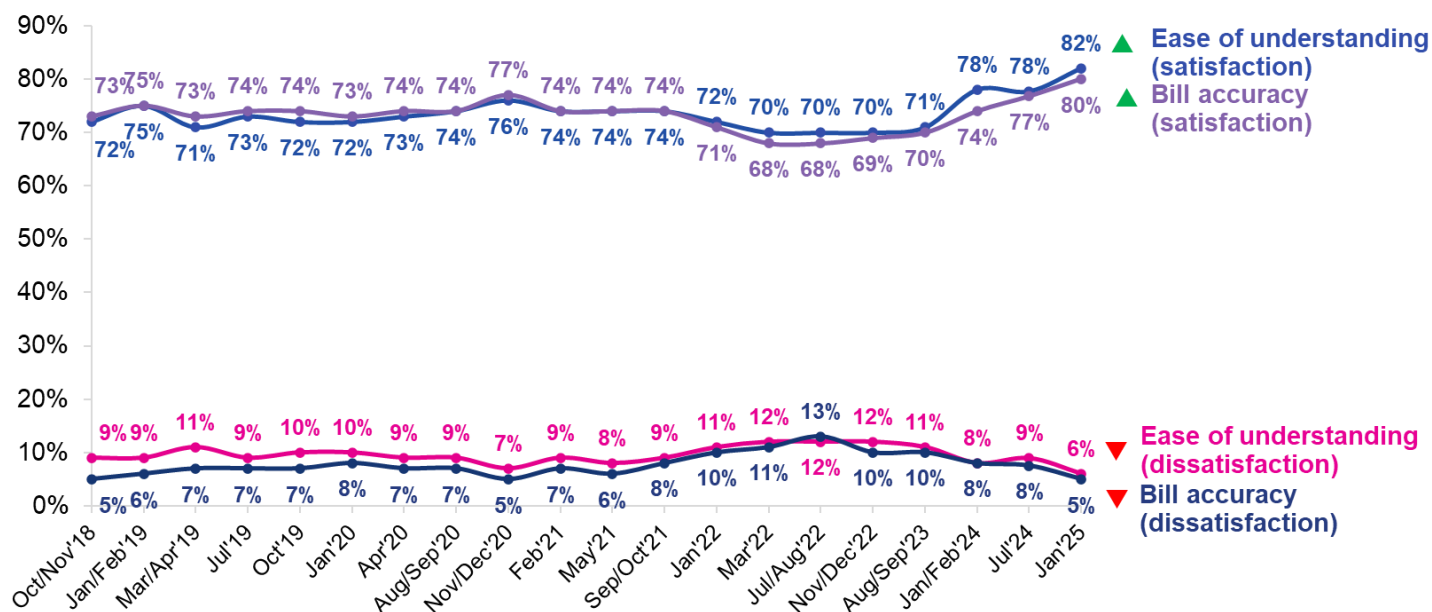
- **Overall satisfaction with bill accuracy and ease of understanding reached an all-time high:** 80% were satisfied with bill accuracy, and 82% were satisfied with the ease of understanding their bill, and dissatisfaction reached an all-time low, at 5% and 6% respectively. Asked for the first time this wave, 87% were satisfied with when their bill is delivered (i.e. their bills are delivered when they expect them).
- **Dissatisfaction with bill understanding and accuracy continues to stem from difficulty in understanding how the total cost is calculated:** the top reason for dissatisfaction with both ease of understanding and accuracy was that it is difficult to understand how the total cost has been calculated.
- **One in four continue to receive an unexpectedly high bill:** The proportion of customers receiving unexpectedly high bills has fallen to 26%, down from 33% in August/September 2023, although this is still a sizeable proportion of respondents.

Satisfaction with bill accuracy and ease of understanding

Overall satisfaction with bill accuracy and ease of understanding reached an all time high in the latest wave, at 80% and 82% respectively, and dissatisfaction reached an all time low, at 6% and 5% respectively.

Asked for the first time this wave, 87% were satisfied with when their bill is delivered (i.e. their bills are delivered when they expect them), and 3% were dissatisfied.

Figure 17: 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 Jan'25 (3,200). Intervals between surveys vary.

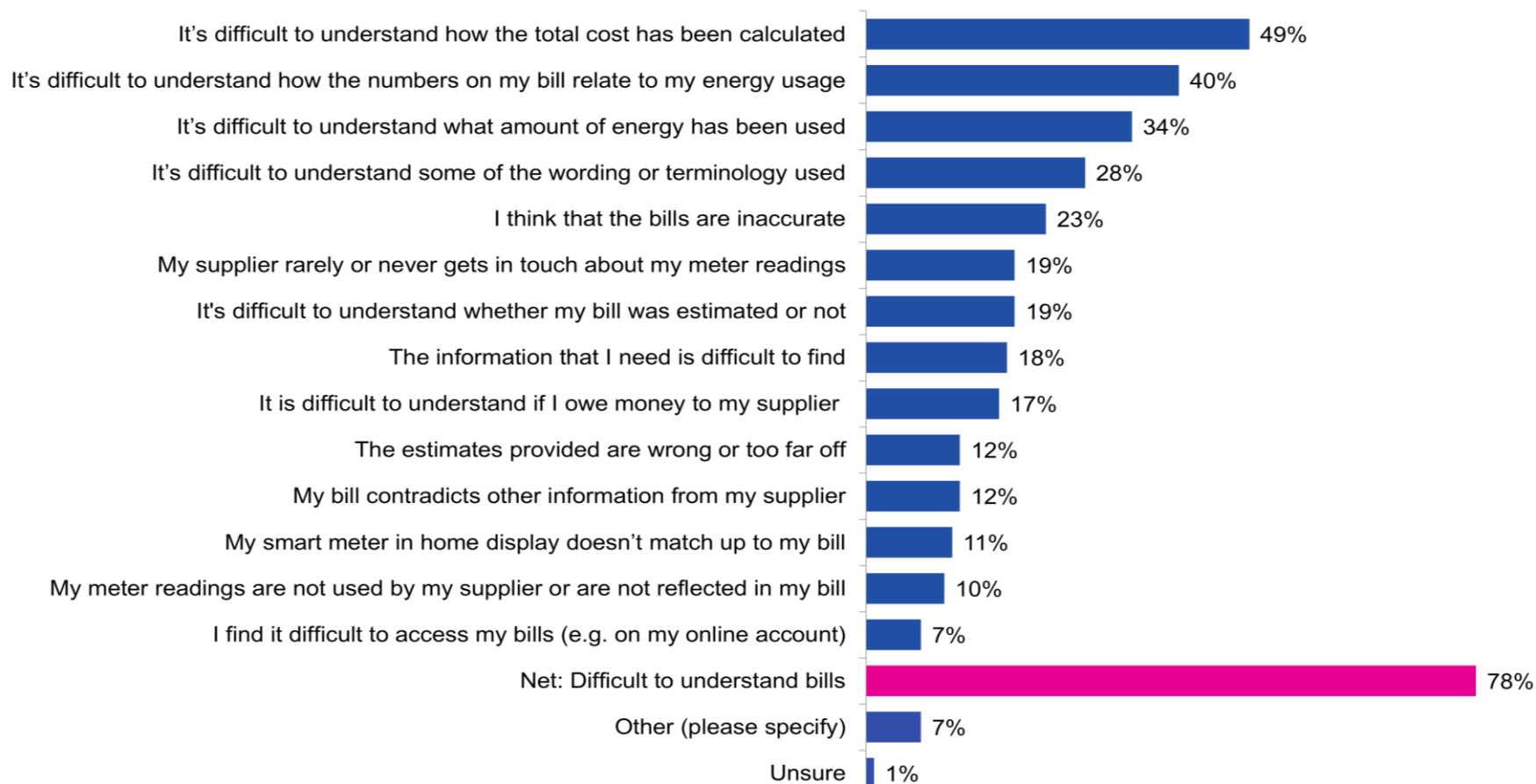
Significance is marked versus the previous wave only.

Reasons for dissatisfaction with ease of understanding of bills

Half (49%) of those dissatisfied with the ease of understanding of bills said this was because it is difficult to understand how the total cost has been calculated. This has increased steadily from the 35% who cited this reason in August/September 2023.

Two in five (40%) said it was because they found it difficult to understand how the numbers on the bill relate to energy usage, a third (34%) that it is difficult to understand the amount of energy that has been used, and around a quarter that it is difficult to understand the terminology (28%) or that they thought the bill was inaccurate (23%).

Figure 18: Reasons for dissatisfaction with ease of understanding of bills



B9: Why are you dissatisfied with the ease of understanding your bill from your supplier?

Base: Dissatisfied with ease of understanding the bill (207)

Note: Answer code 'It's difficult to understand whether my bill was estimated or not' was added for the first time this wave

Reasons for dissatisfaction with bill accuracy

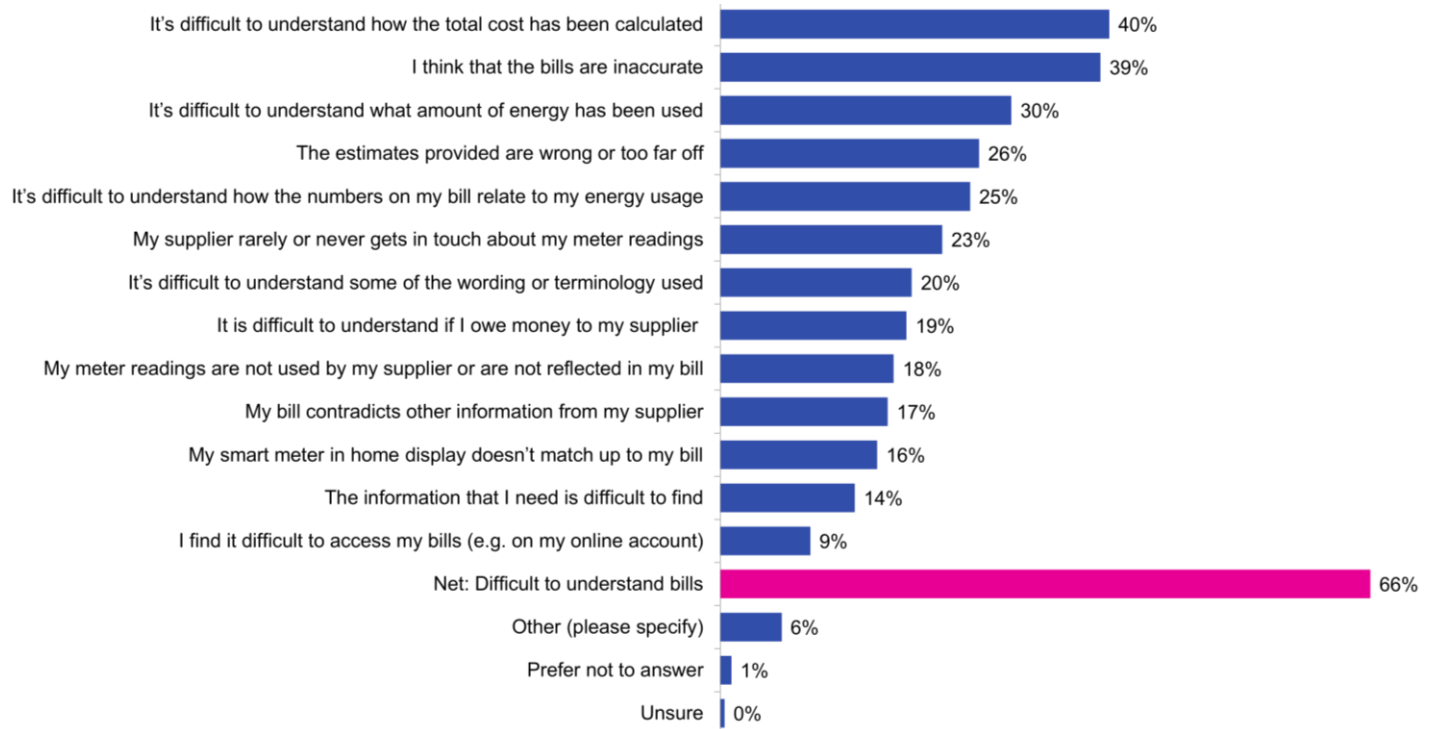
For those who reported dissatisfaction with billing accuracy, as with ease of understanding bills, the top reason, cited by two in five (40%), was difficulty understanding how the total cost has been calculated.

A similar proportion (39%) thought the bill was inaccurate. Three in ten (30%) said it was difficult to understand what amount of energy had been used, and a quarter that the estimates provided were wrong or too far off (26%) or that it was difficult to understand how the numbers on the bill related to energy usage. (25%). Nevertheless, the proportion mentioning the latter has reduced from 36% in January/February 2024.

There have also been decreases in the proportion of those dissatisfied with the accuracy of their bill who said this was because their smart meter display does not match the bill, from 25% in January/February 2024 to 16% in the latest wave. This links to improvements we are seeing elsewhere in the smart meter experience (explored in section 5).

By contrast, there has been an increase in the proportion saying they are dissatisfied because the bill contradicts other information from the supplier, from 7% in August/September 2023, to 17% in the latest wave.

Figure 19: Reasons for dissatisfaction with bill accuracy



B9A: Why are you dissatisfied with the accuracy of your bill from your supplier?
 Base: Dissatisfied with accuracy of the bill (174)

Experience of unexpectedly high bills in the last three months

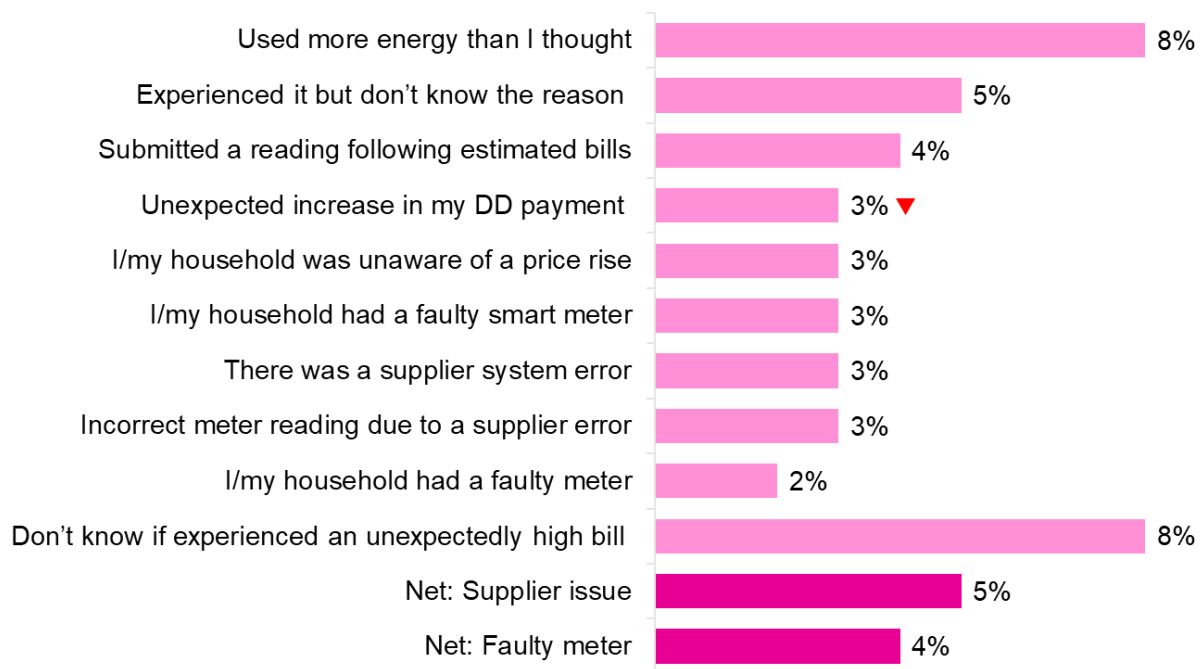
Alongside the increases in satisfaction with billing accuracy, there has been a continued reduction in the proportion of respondents who reported receiving an unexpectedly high bill in the last three months, from 33% in August/September 2023 to 26% in the latest survey.

However, it remains that around one in four consumers report receiving an unexpectedly high bill, showing continued room for improvement.

8% of respondents overall said that they had received an unexpectedly high bill in the past few months due to using more energy than they thought.

The number of consumers reporting that they received an unexpectedly high bill because of an unexpected increase in their direct debit payments has seen a significant decrease compared to the previous wave.

Figure 20: Reported reasons for receiving an unexpectedly high bill



B11: In the last 3 months, have you experienced an unexpectedly high bill due to any of the following reasons?
Base: All respondents: Jan'25 (3,854).

Among payment types, those paying by standard credit (42%) and prepayment meter (31%) are much more likely than the average to have experienced an unexpectedly high bill. In contrast, 23% of direct debit customers experienced an unexpectedly high bill.

Contacting suppliers

Overview of findings

- **Consistent contact rates:** almost one in three (32%) had contacted their supplier in the last 3 months, in line with previous waves. For those getting in contact, the most common reasons were to give a meter reading (19%), a smart meter query (16%) or to query bills received (15%).
- **For the first time, overall satisfaction was higher among those who contacted their supplier than those who did not:** customer service satisfaction showed a similar picture with increases for those who had contacted, or tried to contact, their supplier.
- **Ease of contacting supplier has reached the highest level yet recorded:** 75% of customers who got in contact or tried to contact their supplier reported finding it easy, up from 70% in January/February 2024 and from the lowest point at 58% in November/December 2022. Contact ratings were at their highest and levels of dissatisfaction at their lowest levels for each main contact method (phone, email, app and live chat)
- **Specific aspects of contact have also seen improvements:** satisfaction has improved across 9 out of 13 elements of contact, in particular in relation to the service received through social media, the time it took to get through to someone who could resolve the query, the ease of finding the right contact details and the service received by phone.
- **The proportion of customers experiencing at least one difficulty with making contact is at the lowest level so far, but remains around half:** These challenges continue to be driven primarily by long wait times.
- **Issue resolution has continued to improve:** the proportion who reported a lack of resolution of their issue has continued to reduce to 9% in the latest survey. By contrast, the proportion reporting a full resolution increased from 60% to 67%.
- **Views on the range of contact methods available have improved:** Of those who contacted, or tried to contact their supplier, 79% were satisfied with the range of methods available to do so, up on 72% in July 2024, and 81% agreed that the contact methods available met their needs, again up on 74% in July 2024.

Contact with suppliers

As was the case in recent waves, around one in three (32%) reported contacting their supplier in the last three months. A further 3% said they had tried to contact their supplier but had been unable to get through, down from 4% in July 2024 – a decline that speaks to some of the broader improvements covered in this section.

Customer service satisfaction has increased steadily among both those who have contacted their supplier (from 70% in August/September 2023 to 82% in the latest wave) and those who have tried to contact their supplier but been unable to get through (from 38% in August/September 2023 to 48% in the latest wave).

Overall supplier satisfaction has shown a similar picture, increasing significantly since the July 2024 wave among those who had contacted their supplier, from 77% to 84%, and showing a longer term upward trend for those who had tried to contact but been unable to do so (from 41% in August/September 2023 to 60% in the latest wave), and those who have not tried to contact their supplier (from 71% in August/September 2023 to 80% in the latest wave).

Accordingly, for the first time, overall satisfaction was higher among those who had or who had tried to contact their supplier (82%) than it was among those who had not tried to contact their supplier (80%).

Among those that had contacted or tried to contact their supplier, the most common methods of contact were by phone (48%), email (25%), their app (22%) and via live chat (12%).

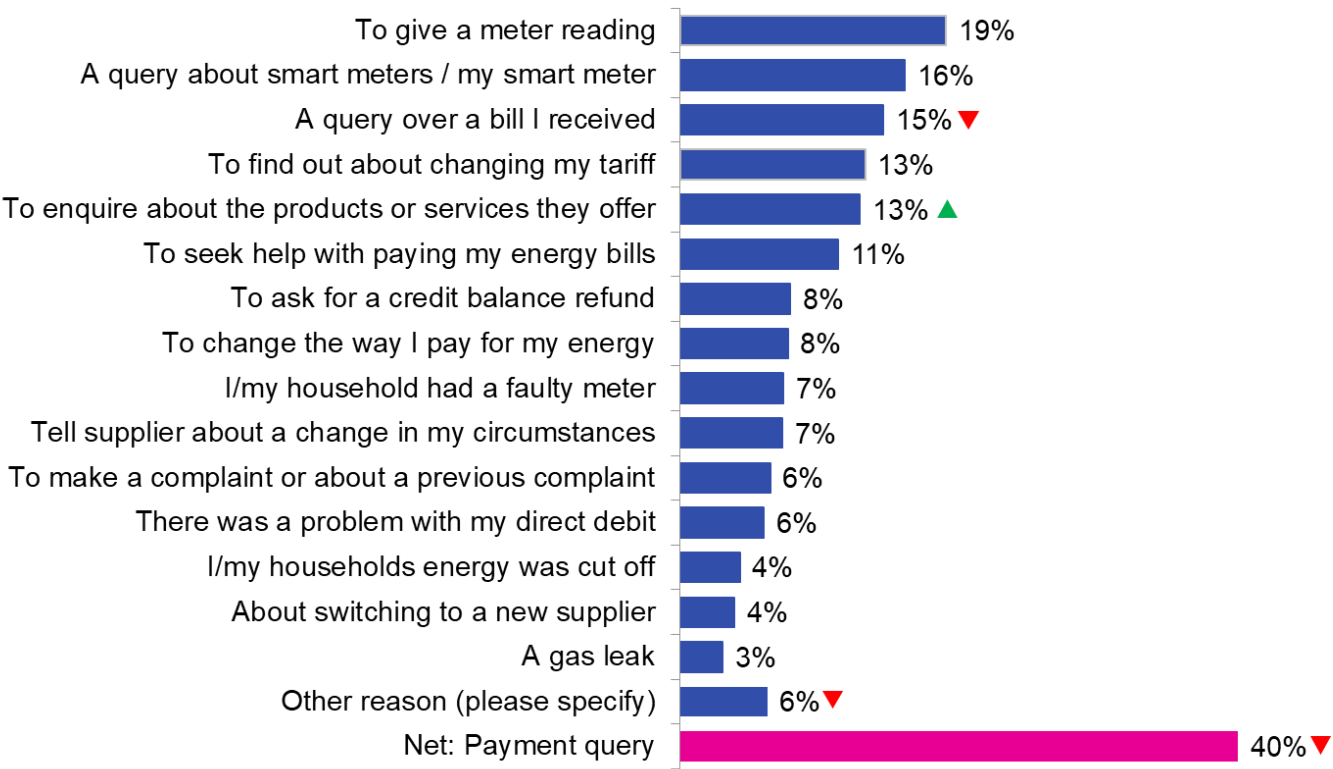
Reasons for contact with suppliers

Among those who contacted their supplier, the main reasons for doing so were to give a meter reading (19%), a query about a smart meter (16%), or to query a bill (15%), with the latter having reduced from 19% in July 2024.

There has been an increase in the proportion who contacted their supplier to enquire about the products or services they offer, from 9% in July 2024 to 13% in the latest wave. It is possible this links to the rise in consumers switching to new tariffs, something we explore in section 5.

Overall, the proportion who reported contacting their supplier with a payment query of any sort has reduced from 45% in July 2024 to 40% in the latest wave.

Figure 21: Reasons for contacting supplier

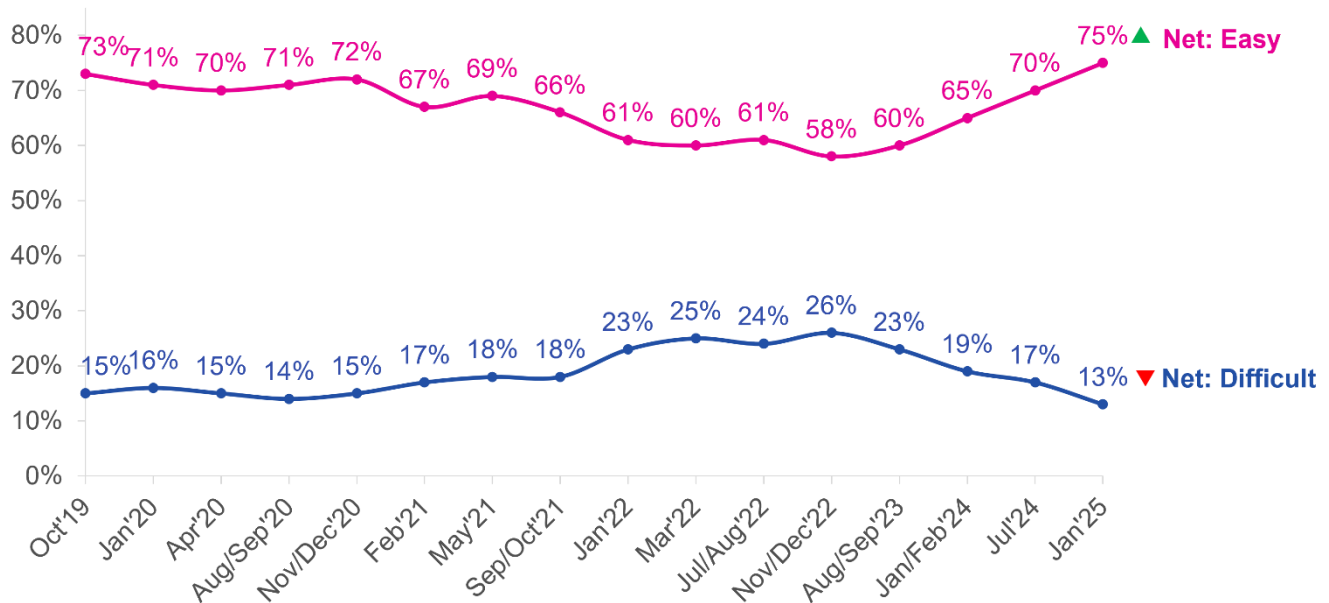


E4. Thinking of the last time you made contact with [supplier], what was it about?
Base: All who contacted or tried to contact Jan'25 (1,388).

Ease of contacting suppliers

Ease of contacting suppliers has reached the highest level yet recorded, with 75% of those who had contacted or tried to contact their supplier reporting that it was easy. Similarly, the proportion rating it as difficult to contact their supplier has reached the lowest level yet recorded, with 13% reporting it was difficult.

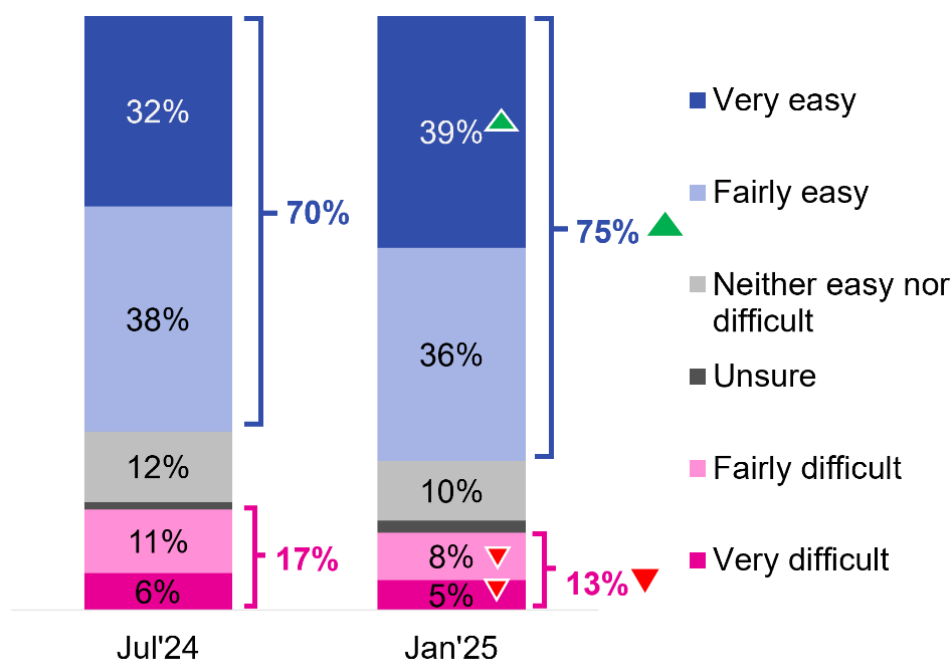
Figure 22: Ease of contacting suppliers over time



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: Jan'25 (3,238), Jul'24 (3,148), Jan/Feb'24 (3,214). Intervals between surveys vary. Significance is marked versus the previous wave only

When looking closer at the comparison between this wave and last wave, customer experience has improved — 75% now find it easy to contact their supplier, up from 70% in July 2024, with ‘very easy’ rising from 32% to 39%.

Figure 23: Ease of contacting suppliers

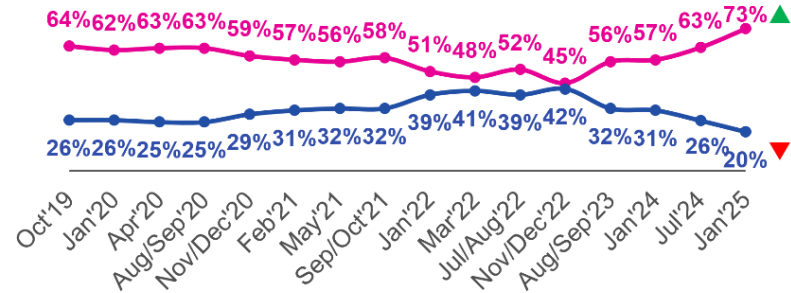


E2. Thinking about the last time you tried to contact [supplier] how easy or difficult did you find it to contact them?
 Base: All those excluding those who have not tried to contact supplier: Jan'25 (3,238), Jul'24 (3,148),
 Data labels not shown for values below 3%

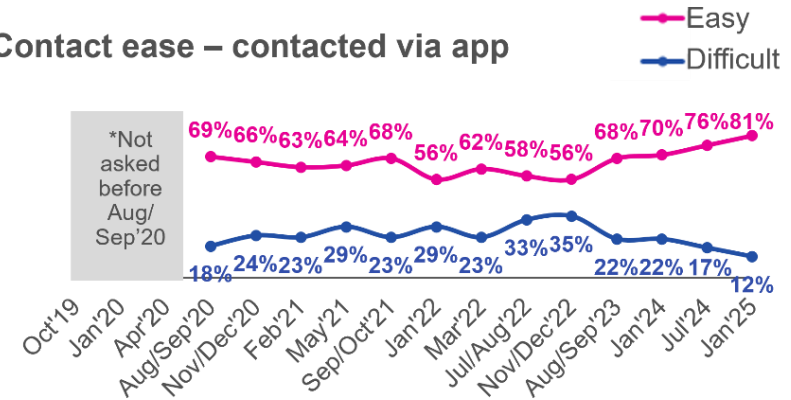
The larger number of respondents who contacted their supplier via phone explains why ease of contact ratings for this method were statistically significant wave on wave, compared to other contact methods. Across all methods, ease of contact ratings were at their highest levels while the proportion of respondents rating contact as difficult was at its lowest - 73% rated phone as easy and 20% rated it as difficult, 81% rated contact via app as easy and 12% rated it as difficult, 78% of email contacts were rated as easy and 16% as difficult, and 74% rated live chat as easy, and 18% as difficult.

Figure 24: Ease of contacting suppliers by contact method over time

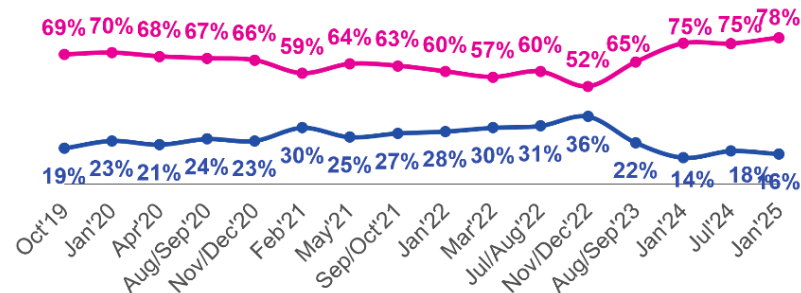
Contact ease – contacted via phone



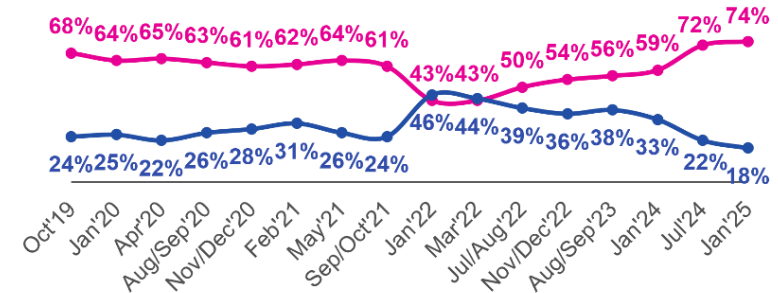
Contact ease – contacted via app



Contact ease – contacted via email



Contact ease – contacted via live chat



E6. How did you make contact with [supplier] on that last occasion? Base: All who contacted or tried to contact Jan'25 (1,388)

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 Jan'25 via: phone (671), app (297), email (342), live chat (171).

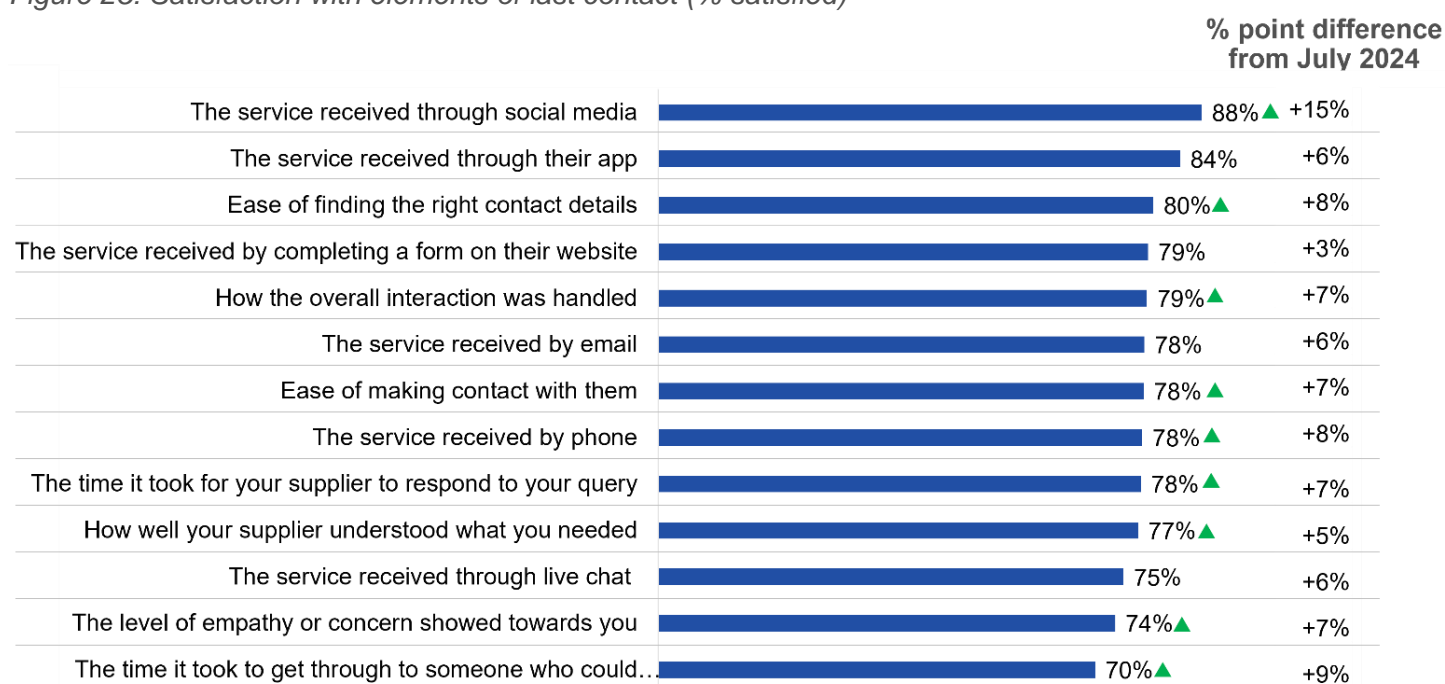
Neither easy/difficult not shown. Consumers could select multiple channels. Intervals between surveys vary. Significance is marked versus the previous wave only.

Satisfaction with elements of last contact

As well as improvement in terms of ease of contact overall, there have also been improvements in levels of satisfaction in relation to various aspects of contact (e.g., response times, quality of interactions, communication channels, etc), and in most instances, the improvements are statistically significant. The most marked improvements were in relation to satisfaction with the:

- service received through social media (from 73% in July 2024 to 88% in the latest wave)
- time it took to get through to someone who could resolve the query (from 61% to 70%), although this remains the dimension with the lowest level of satisfaction
- ease of finding the right contact details (from 72% to 80%)
- service received by phone (from 70% to 78%)

Figure 25: Satisfaction with elements of last contact (% satisfied)



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

Base: all who contacted or tried to contact via a particular method where relevant (bases vary as a result) Jan'25 (1,388)

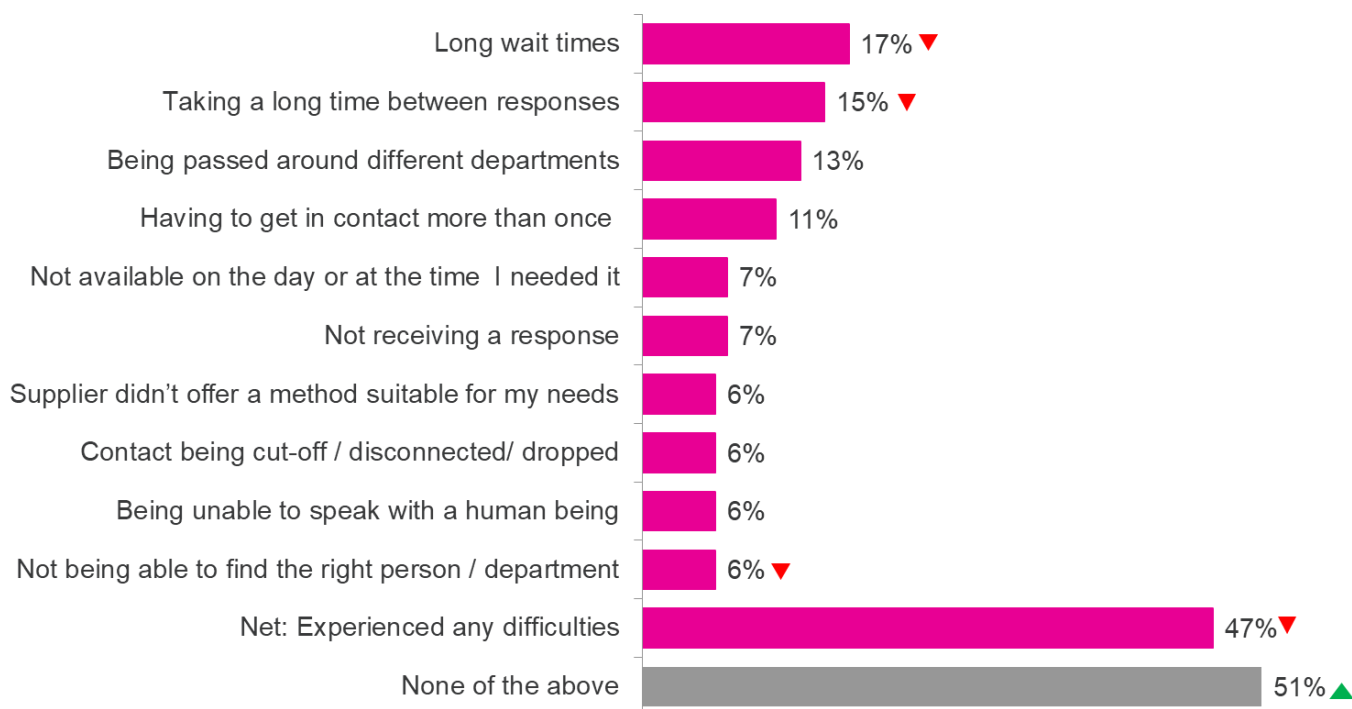
Experience of difficulties

Reflecting the improvements outlined above, the proportion who reported experiencing at least one difficulty related to their most recent contact is at the lowest level so far recorded. This has fallen from 63% in August/September 2023 to 47% in the latest wave. However, this means that close to half of those making or trying to make contact with their supplier have still encountered difficulties.

As previously reported, the most reported difficulties experienced were long wait times (17%) and suppliers taking a long time between responses (15%), although these were both mentioned at lower levels than was the case in July 2024 (24% and 20% respectively).

Overall, a third (35%) of those who had experienced difficulties when contacting or trying to contact their supplier said this was related to difficulties in getting through to somebody (e.g. passed around departments, not being able to find the right person, etc).

Figure 26: Difficulties experienced with contact

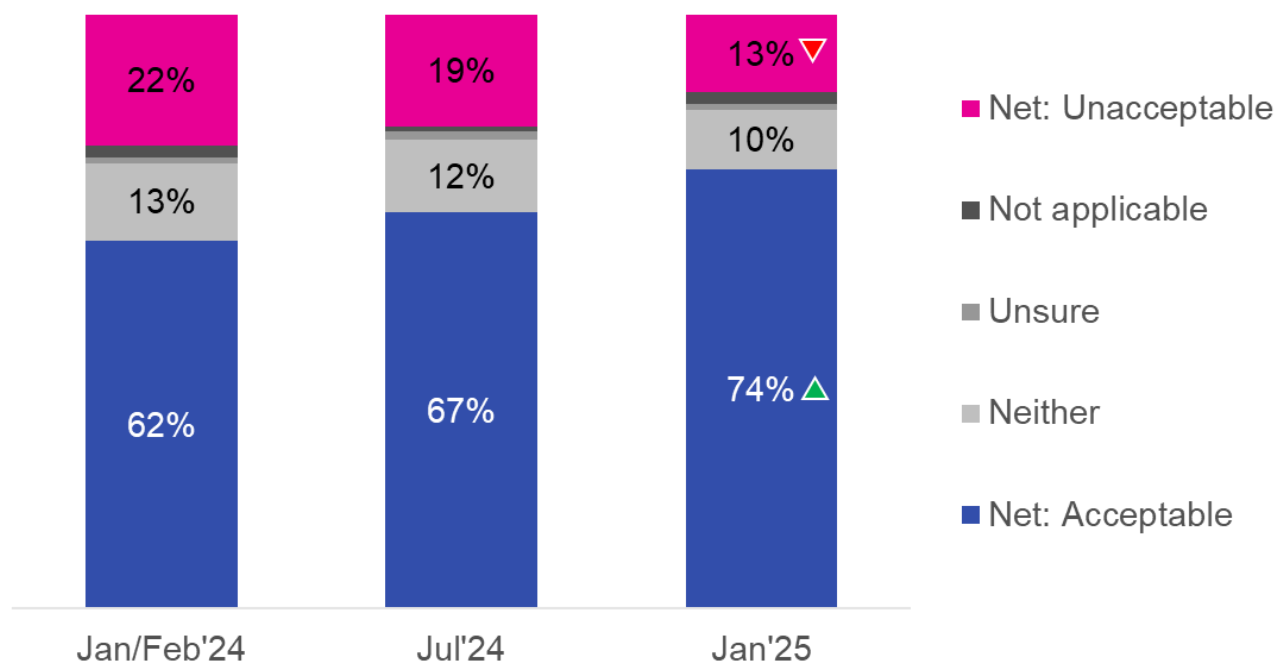


E12. On the most recent occasion you got in touch with [supplier], did you experience any of the following difficulties?

Base: All who contacted or tried to contact: Jan'25 (1,388)

Overall, one in ten (13%) found the number of times they had to contact their supplier about an issue unacceptable, a reduction on the 19% who did so in July 2024, while three quarters (74%) found the number of contact attempts acceptable, an uplift on the 67% who did so in July 2024.

Figure 27: Acceptability of number of contact attempts

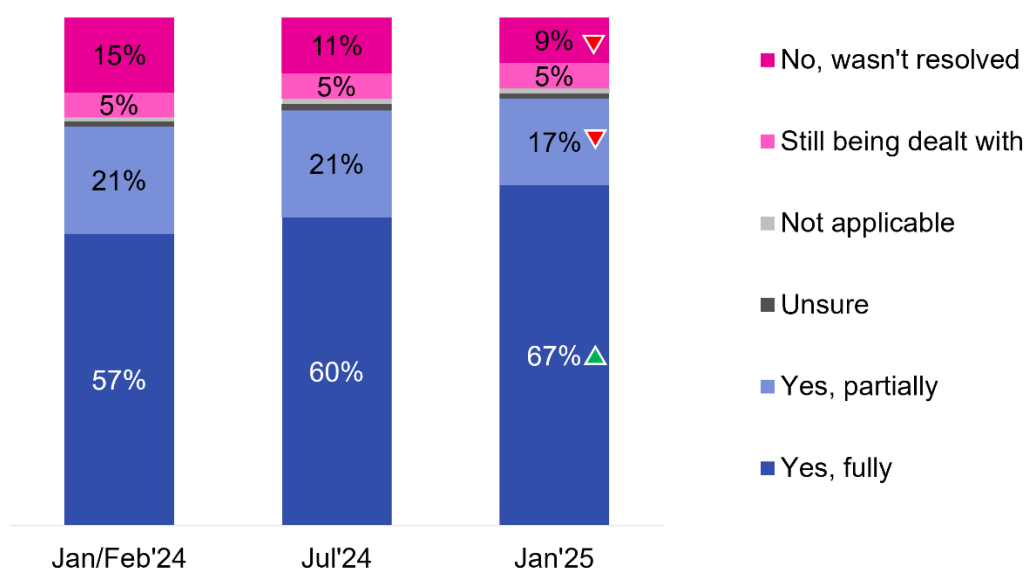


E12A. How acceptable or unacceptable was the number of times you had to get in contact about that given issue?
Base: All who contacted or tried to contact: Jan'25 (1,388), Jul'24 (1,398), Jan/Feb'24 (1,456). Data labels not shown for values below 3%

Issue resolution

The share reporting a lack of resolution of their issue has continued to reduce, from 15% in January/February to 11% in July 2024 and to 9% in the latest survey. By contrast, the proportion reporting a full resolution increased from 60% in July 2024 to 67% in the latest wave, while the proportion reporting a partial resolution decreased from 21% to 17%.

Figure 28: Issue resolution



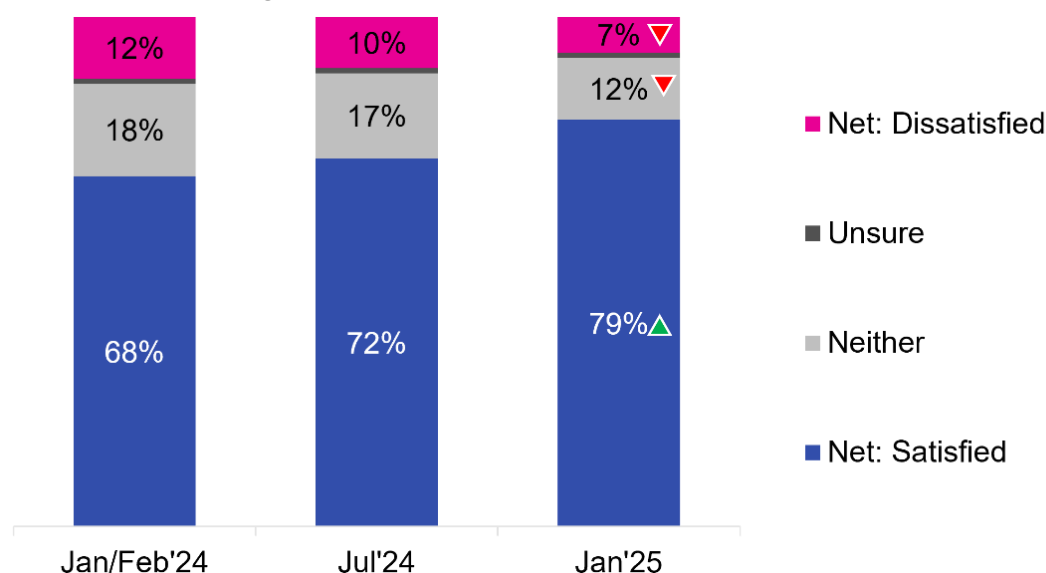
E14. Would you say your query, issue or question was answered or resolved?

Base: All who contacted or tried to contact: Jan'25 (1,388), Jul'24 (1,398), Jan/Feb'24 (1,456). Significance is marked versus the previous wave only. Data labels not shown for values below 3%

Satisfaction with range of contact methods available

Four in five (79%) said they were satisfied with the range of methods available to contact their supplier, an uplift on the 72% who did so in July 2024. Correspondingly, the proportion who said they were dissatisfied reduced from 10% to 7%.

Figure 29: Satisfaction with range of contact methods available



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

Base: All who contacted or tried to contact: Jan'25 (1,388) Jul'24 (1,398), Jan/Feb'24 (1456) Significance is marked versus the previous wave only. Data labels not shown for values below 3%.

Complaints

Overview of findings

- **Complaint levels remain consistent:** close to one in ten (6%) of respondents who contacted their supplier reported that this was to make a complaint, or about an existing complaint, which equates to 2% of all respondents, in line with previous waves.
- **More were dissatisfied than satisfied with complaint handling and process length: among those who reported making a complaint,** 50% were dissatisfied with the overall handling of complaints and 55% with the time taken to reach the end of the formal complaints process.

Reasons for complaints

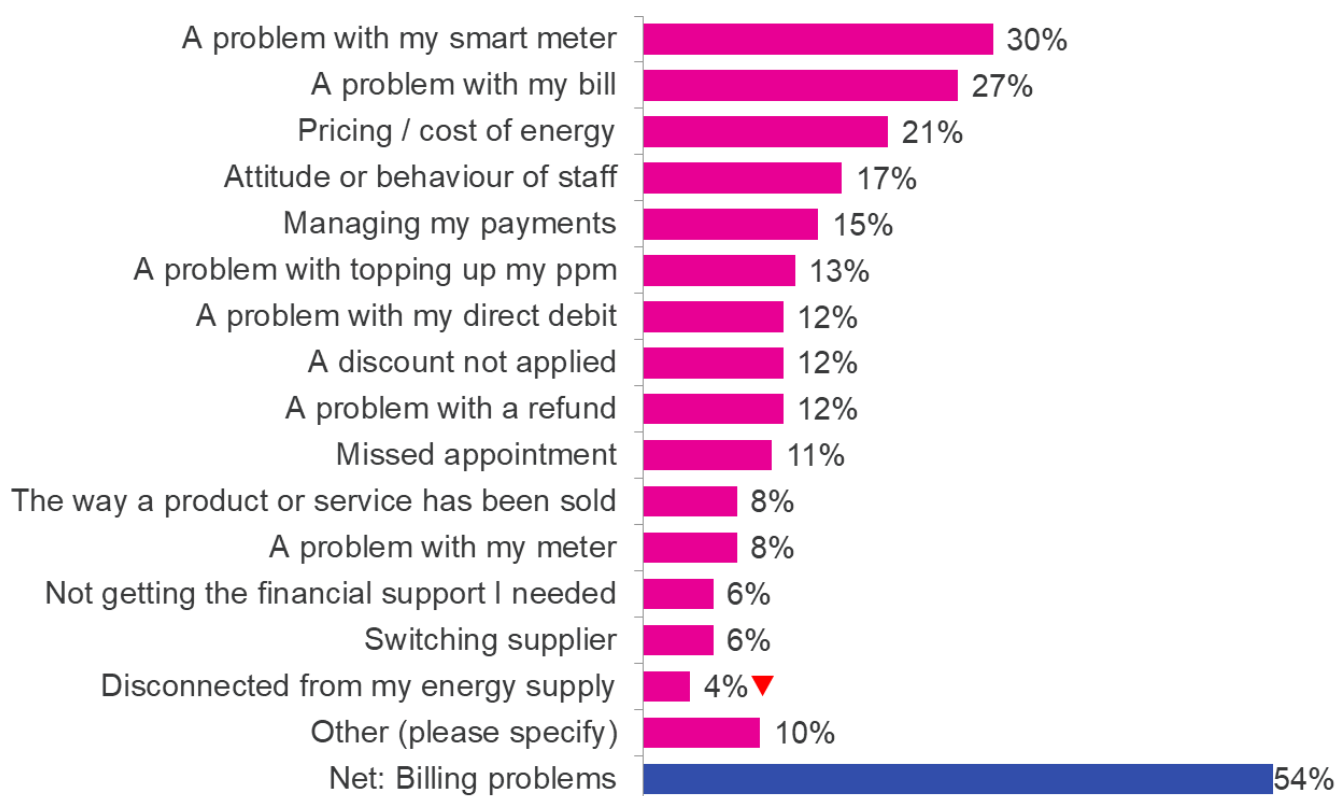
One in twenty (6%) of consumers who contacted their supplier reported making a complaint, which equates to 2% of all respondents. ¹⁶ This is in line with July 2024.

In the previous three waves, problems with bills was the most common reason for complaining, mentioned by 27% in this wave, but this was exceeded by problems with smart meters, mentioned by 30%. Movements are based on low sample sizes so this is something we will continue to monitor.

Pricing, mentioned by 21%, and the attitude/behaviour of staff, mentioned by 17% were the next most common reasons for complaining.

The proportion who said they had their energy supply disconnected fell from 13% in July 2024 to 4% in the latest wave.

Figure 30: Reasons for complaints

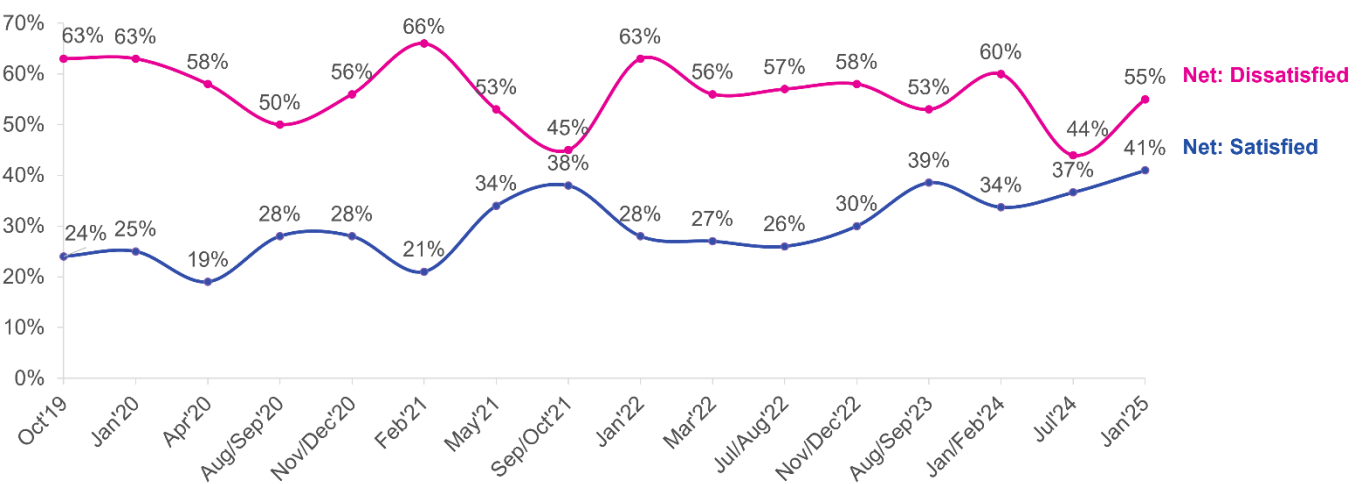


E8. Earlier you said your last contact with [supplier] was about a complaint. What was the complaint about?
Base: All who contacted to make a complaint: Jan'25 (89)

Satisfaction with elements of complaints handling

Despite the apparent volatility shown in the figure below, low base sizes mean that satisfaction with the duration of the formal complaints process remained largely unchanged, with dissatisfaction (55%) still higher than satisfaction (41%).

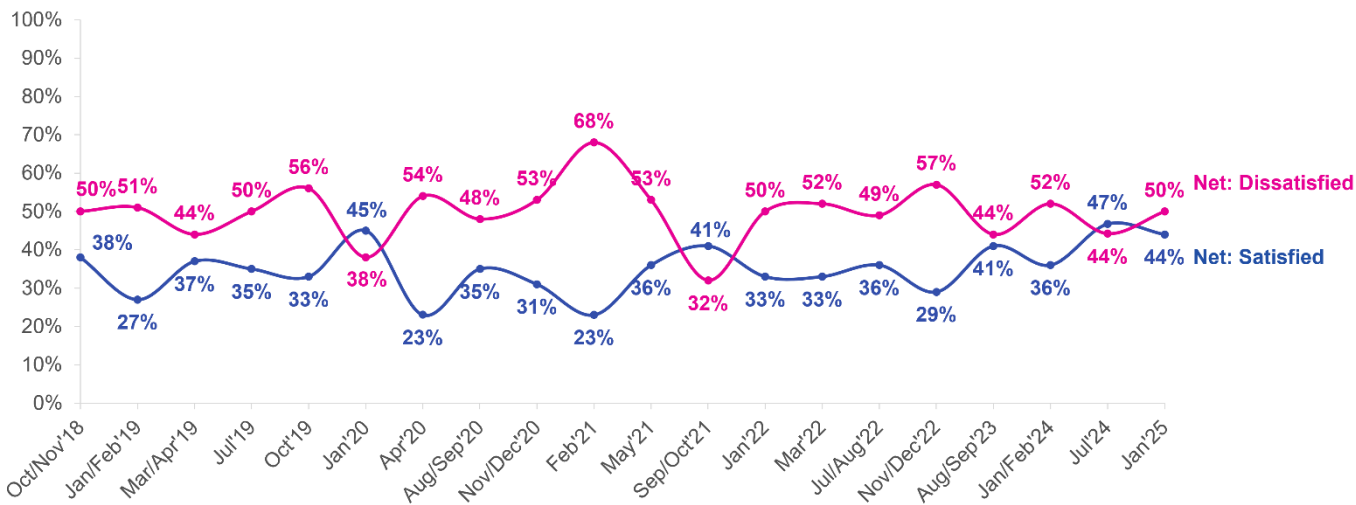
Figure 31: Satisfaction with time taken to reach the end of the formal complaints process



E10. Please can you tell me how satisfied or dissatisfied you are with the following aspects of your complaint: time taken to reach the end of the formal complaints process.
Base: All who contacted to make a complaint (89). Intervals between surveys vary. Significance is marked versus the previous wave only.

Again, despite the apparent volatility shown in the figure below, low base sizes mean that satisfaction with the overall handling of complaints remained relatively stable, with dissatisfaction (50%) again higher than satisfaction (44%), after a switch in July 2024.

Figure 32: 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:
overall handling of complaints.
Base: Contacted to make a complaint (89). Intervals between surveys vary. Significance is marked versus the previous wave only.

Information provided by suppliers

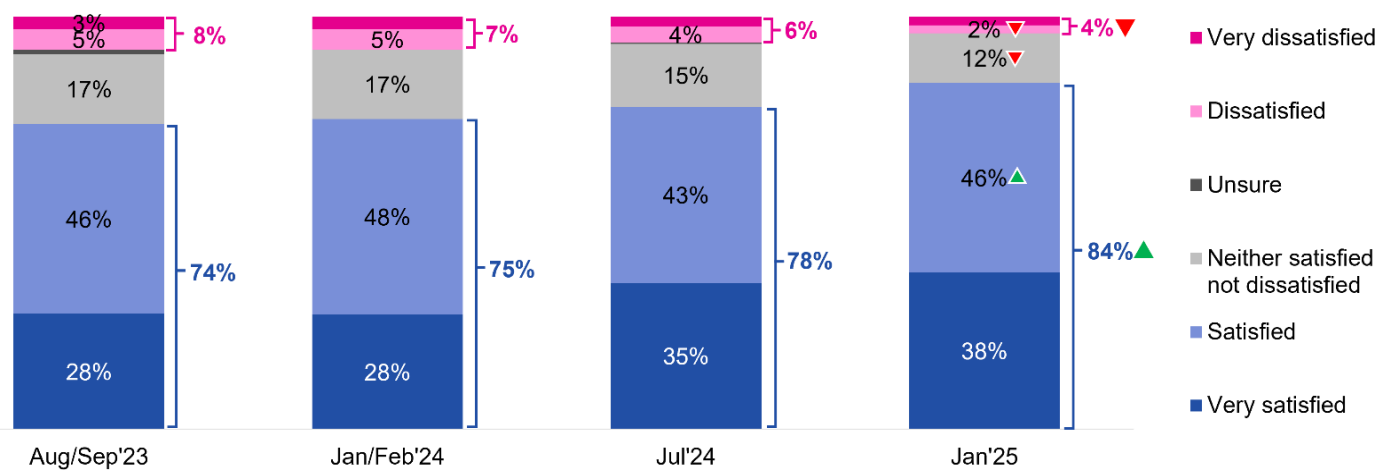
Overview of findings

- **Satisfaction with the information provided by suppliers has improved further:** satisfaction with the information received from their supplier has increased from 75% in January/February 2024, to 78% in July 2024 and to 84% in the latest wave.
- **Information seen as useful:** all types of information were regarded as useful by at least four in five respondents. Perceived usefulness has increased since July 2024 in relation to information about the complaints process, what to do if their supplier cannot resolve the complaint, free number for concerns about falling behind, and how to receive bill paying assistance.
- **Information about getting a smart meter seen as the least useful:** 61% of those who don't have a smart meter or don't know if they have one felt information about getting a smart meter was useful. This was much lower than all other information received, which could reflect some customers resistance or reluctance to get a smart meter.

Satisfaction with supplier information

The latest wave saw a further increase in satisfaction with the information received from their supplier, from 75% in January/February 2024, to 78% in July 2024 and to 84% in the latest wave, with the increase driven by those who reported being 'satisfied', from 43% to 46%. Just 4% were dissatisfied in this respect, a decline on the 6% who were dissatisfied in July 2024. Additionally, the proportion of those who reported being 'very satisfied' increased significantly compared to both August/September 2023 and January/February 2024.

Figure 33: 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: Jan'25 (2,560), Jul'24 (2,506), Jan/Feb'24 (2,533), Aug/Sep'23 (2,387). Significance is marked versus the previous wave only. Data labels not shown for values below 3%

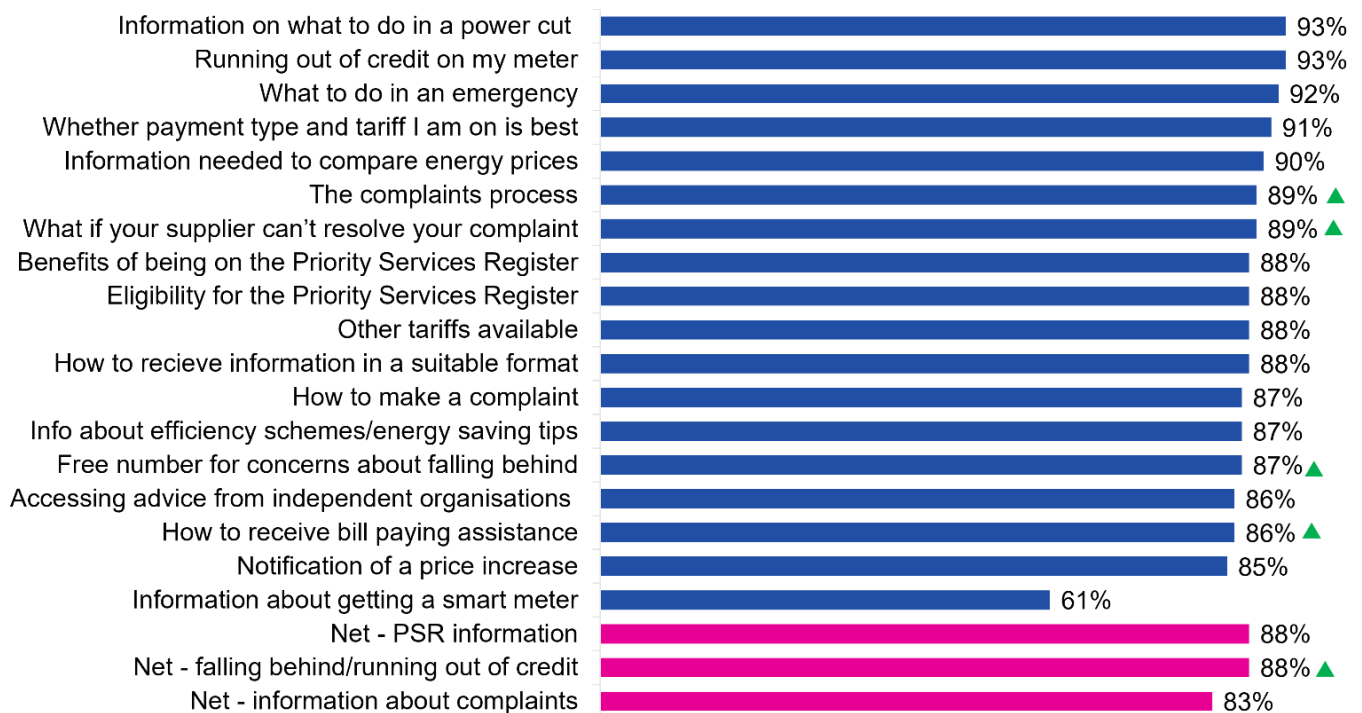
Usefulness of information received from supplier

In terms of the usefulness of the information received from suppliers, all types were regarded as useful by at least four in five respondents, with the exception being information about getting a smart meter, which was regarded as useful by 61% of those who did not have one, in line with July 2024.

Perceived usefulness increased since July 2024 in relation to information about the complaints process (to 89%), what to do if their supplier cannot resolve the complaint (to 89%), free number for concerns about falling behind (to 87%), and how to receive bill paying assistance (to 86%), in each case an increase of 3%.

Regarding the small proportion of respondents who received information from their supplier when a prepayment meter was installed, over four fifths (84%) were satisfied and 2% were dissatisfied, in line with July 2024.

Figure 34: Usefulness of information received from supplier



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

Base: Received information (mixed base sizes)

What are the experiences of customers struggling financially or falling into debt?

Overview of findings

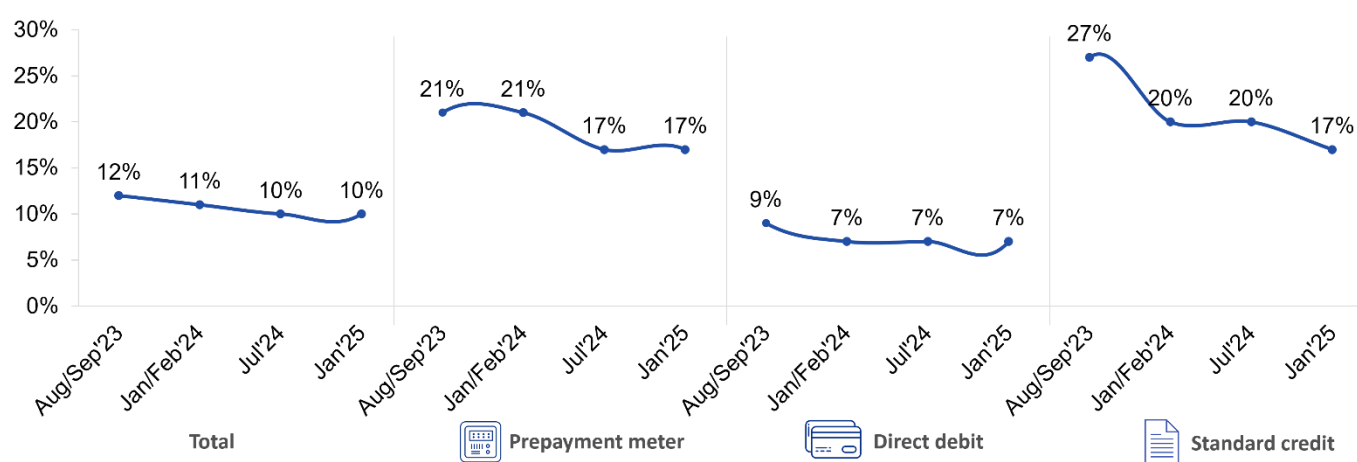
- **Affordability issues persist despite wider cost of living pressures easing:** despite signs of reported financial pressures easing, 10% of respondents said they had fallen behind on their bills or had run out of credit in the last three months for affordability reasons.
- **Levels of customer-supplier contact remain at close to their highest levels since tracking began:** 7 in 10 (69%) of those fallen behind or run out of credit for affordability reasons have been in contact with their supplier, in line with the peak of 71% seen in July 2024.
- **Most continue to have been offered support from their supplier once they had been in contact:** overall, 87% reported being offered some kind of support, one quarter (27%) reported being offered financial support and over half (55%) a discussion of a repayment plan from their supplier.
- **Fewer were dissatisfied with the support offered by suppliers:** the gains in satisfaction with supplier support in July 2024 have been maintained in the January 2025 (72% cf. 69%). Additionally, there has been a decrease in the proportion dissatisfied in this respect, from 18% to 10%.

Falling behind or running out of credit for affordability reasons

Despite signs of reported financial pressures easing, such as a greater proportion of consumers 'doing well', the share of consumers that reported they were behind on bills or ran out of credit for affordability reasons has remained stable compared to July 2024 (10% across all payment types). Data from Ofgem and Citizens Advice report that debt and arrears has grown overall over time. ^{16 17}

As seen previously, prepayment meter and standard credit customers were more likely than those paying by direct debit to report having fallen behind.

Figure 35: 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: Direct debit (Jan'25: 2,608), standard credit (Jan'25: 628).

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: Prepayment meter (Jan'25: 721)

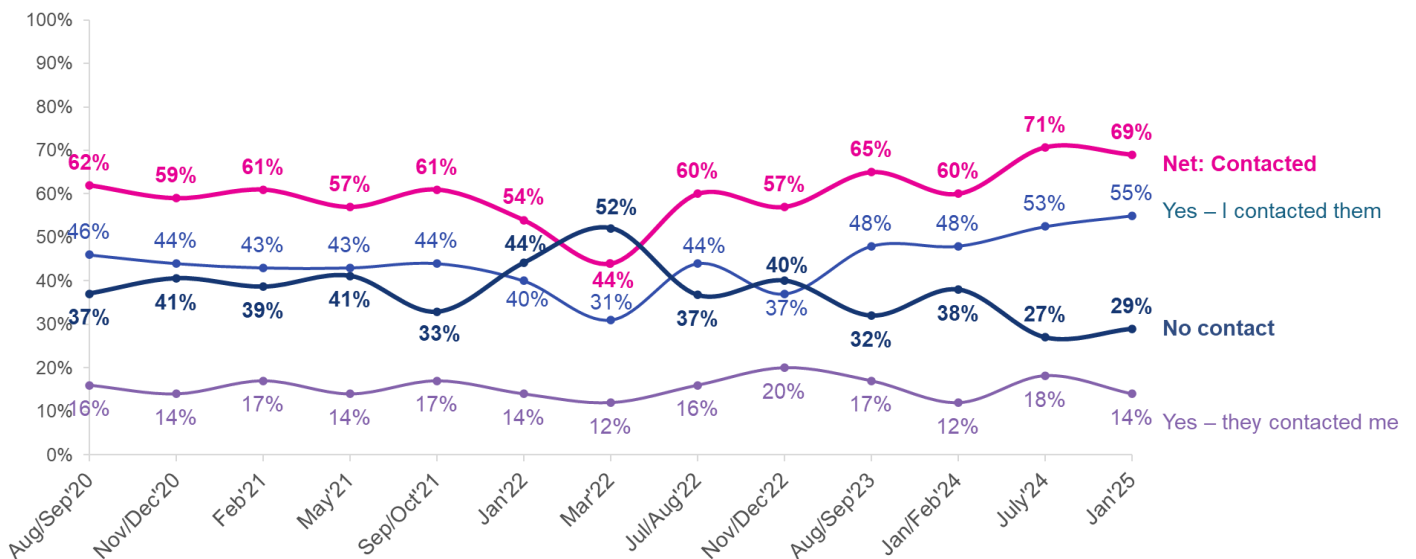
¹⁶ [Debt and arrears indicators | Ofgem](#)

¹⁷ [Debt data - Citizens Advice](#)

Contact with supplier

The increase seen in July 2024 in the proportion of those who had fallen behind and who had contacted, or been contacted by, their supplier about help with paying their bills, was largely maintained in January 2025 (69% cf. 71%). However, a sizeable minority (29%) have not had any contact with their supplier.

Figure 36: Contact with supplier about help paying bills after falling behind / running out of credit for affordability reasons over time



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

Base: Run out of credit/fallen behind for affordability reasons or don't know: Jan'25 (446), Jul' 24 (456). Intervals between surveys vary.

Among the 55% who contacted their supplier for help with bills, most did so after falling behind rather than pre-emptively. A third (33%) of these reported contacting their supplier before they fell behind, two in five (43%) just after, and one in five (17%) quite a while after.

Regarding the methods of contact used, telephone remained the most common method, mentioned by half (51%), followed by email (34%), via live chat (21%) or through the supplier's app (18%). These results are in line with July 2024.

Support offered by supplier

Among credit meter consumers who had contacted, or been contacted, by their supplier, nine in ten (90%) reported receiving at least one form of support, most commonly helping to create a repayment plan (34%), asking questions to try to better understand their situation (30%), offering information about organisations that can provide support or advice on managing bills (28%), or discussing the suitability of an existing repayment plan (22%).

Among prepayment meter consumers who had contacted, or been contacted by their supplier, over nine in ten (92%) reported receiving at least one form of support, most commonly to discuss the suitability of an existing repayment plan (24%), helping to create a repayment plan (23%), offering information about organisations that can provide support or advice on managing bills (22%), or offering a discretionary or temporary credit (20%).

Overall, a quarter (27%) reported that their supplier offered some kind of financial support¹⁸, and over half (55%) offered to discuss repayment.

The full range of responses is shown in Figure 37.

¹⁸ Financial support includes: offering to discuss extending emergency credit as additional support on prepayment meter, offering to discuss providing with energy vouchers for topping up credit on prepayment meter, offering to set it up so that my energy bill is paid directly out of my benefits (also known as 'Fuel Direct', or 'third party deductions'), offering a discretionary or temporary credit (a short-term credit arrangement to help manage energy costs).

Figure 37: Support offered by supplier among consumers that contacted/contacted by their supplier after falling behind/running out of credit for affordability reasons

Supplier offered/asked.....	Credit Meter	Prepayment Meter
to help me create a repayment plan (e.g. by changing my direct debit)	34%	N/A
me some questions to try to better understand my current situation	30%	N/A
me information about the organisations which can provide support or advice on managing bills	28%	22%
to discuss whether my existing repayment plan is still suitable for me	22%	24%
to contact an organisation on my behalf which can provide support or advice on managing bills	21%	13%
to set it up so that my energy bill is paid directly out of my benefits	17%	N/A
to discuss a bill repayment holiday	14%	4%
to install a prepayment meter	12%	N/A
to help me create a repayment plan (e.g. by deducting an amount from my ppm top ups as a repayment towards my debt)	N/A	23%
a discretionary or temporary credit	N/A	20%
to direct me to charities that can arrange for energy vouchers to be provided	N/A	16%
to discuss providing me with energy vouchers for topping up my credit on my ppm	N/A	15%
to discuss extending my emergency credit as additional support on my prepayment meter	N/A	14%
None of these	10%	8%

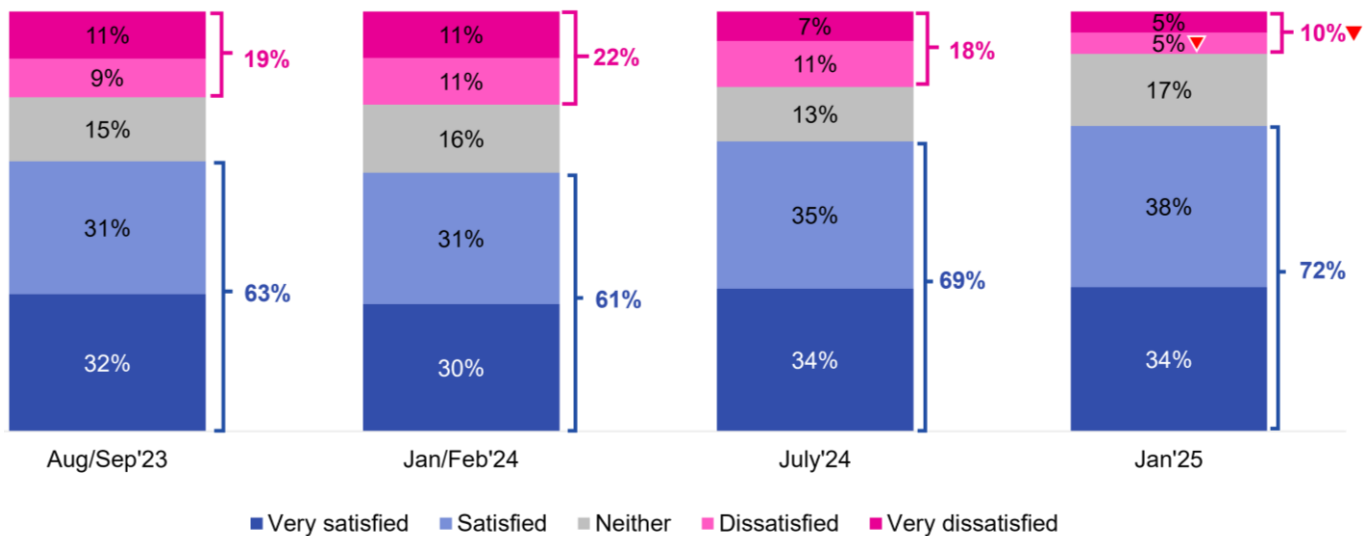
G12: Please could you say whether your supplier offered to support you in any of the following ways, without you asking?

Base: contacted or been contacted by their supplier AND fallen behind for affordability issues: Prepayment meter (91), Credit meter (240) answer codes of 3% or below not shown.

Satisfaction with support offered by supplier

Among those who had fallen behind or run out of credit for affordability reasons and had contact with their supplier about this, 72% were satisfied with the support they received, in line with July 2024 (69%). At 10%, levels of dissatisfaction in this respect are significantly lower than the 18% reported in July 2024, and the lowest reported to date.

Figure 38: 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: Jan'25 (308), Jul'24 (326), Jan/Feb'24 (307), Aug/Sept'23 (363). Significance is marked versus the previous wave only.

Experience of contact with supplier

For those that have been in contact with their supplier about paying their bills, respondents were mostly positive about that contact experience. Top contact experiences include the supplier offering support in a way that was accessible (76%), the person they contacted was sympathetic to their needs (75%) and the supplier treated them fairly (74%). While remaining much in line with figures reported in July 2024, agreement with the statements around contact experiences have increased significantly since August/September 2023.

Figure 39: Agreement with aspects of contact with supplier



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

Base: Contacted/been contacted by their supplier and fell behind/ran out for affordability reasons (310)

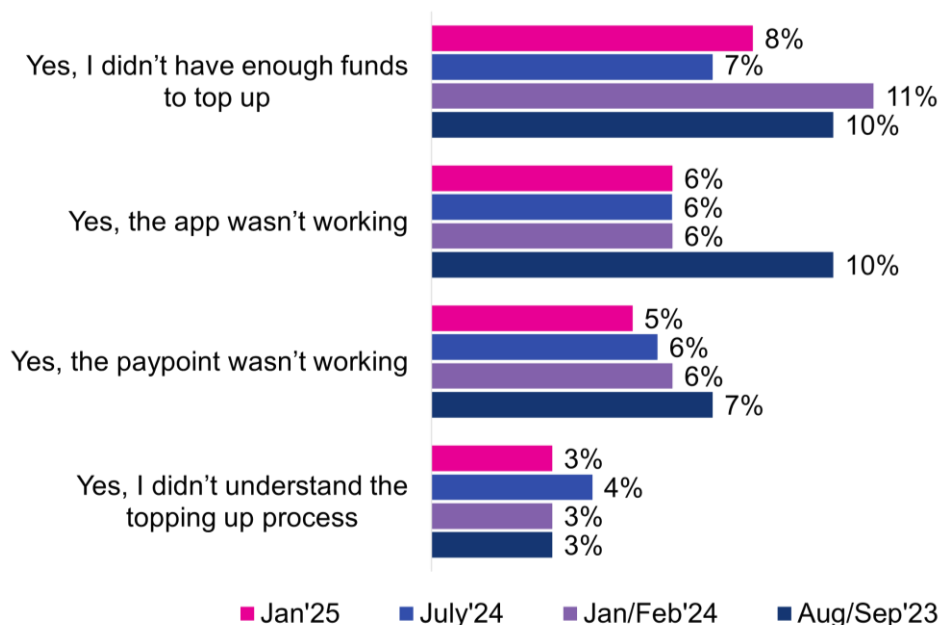
Four in five (82%) of those who had fallen behind/ran out of credit for affordability reasons reported that their supplier asked how much they could afford to pay before discussing a repayment plan, in line with July 2024.

Prepayment meter credit

A quarter (24%) of prepayment meter consumers reported encountering at least one issue when they last topped up their prepayment meter, unchanged compared to July 2024 (24%), but improved compared to August/September 2023 (31%). The inverse is true for those that did not encounter any issues (now at 75%), which remains in line with July 2024 (73%), but has improved compared to August/September 2023 (66%).

Regarding the types of issues encountered, one in ten (8%) reported having insufficient funds to top up, 6% said the app was not working and 5% said the paypoint was not working. .

Figure 40: *Issues encountered when last topping up prepayment meter*

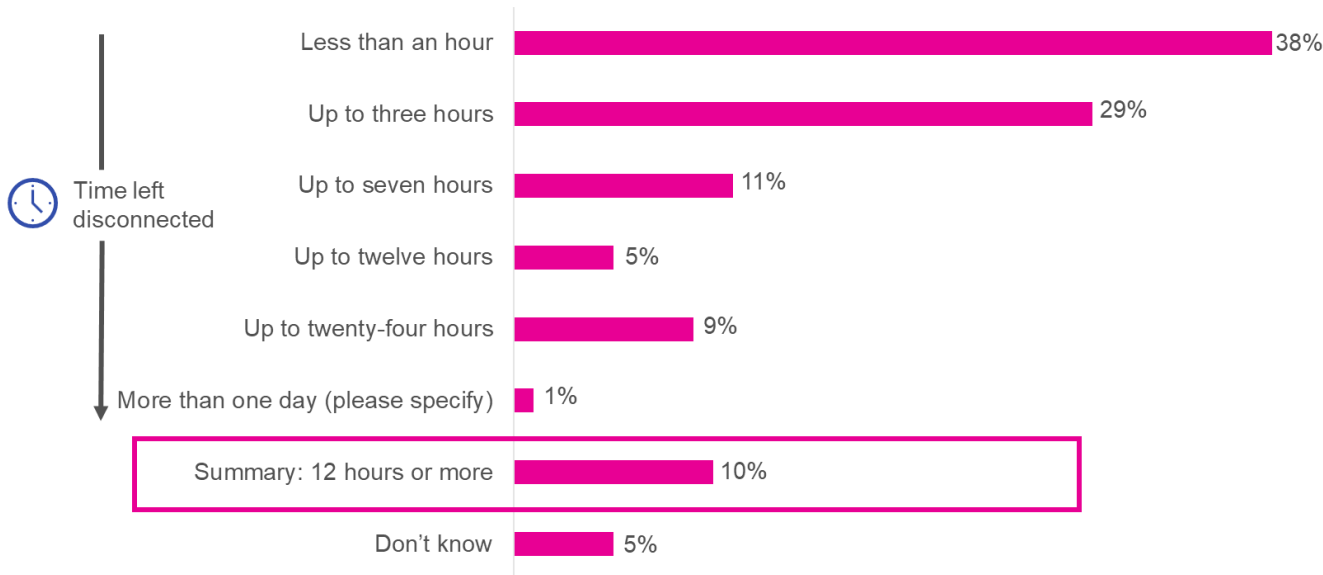


G26: On the last occasion you tried to top up your prepayment meter using your preferred method, did you encounter any issues?

Base: Using a prepayment meter: Jan'25 (674), Jul'24 (663), Jan/Feb'24 (600), Aug/Sep'23 (768).

For prepayment meter customers who ran out of credit due to affordability reasons, 10% reported being disconnected for 12 hours or more. This is in line with previous waves.

Figure 41: 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: Jan'25 (122)

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

Smart meters

Overview of findings

- **Satisfaction with smart meters has increased:** satisfaction with smart meters rose from 72% in July 2024 to 76% in January 2025, with dissatisfaction also reducing from 10% to 7%.
- **Those with smart meters have consistently recorded higher levels of overall supplier satisfaction:** 83% of those with smart meters were satisfied with their supplier, compared to 75% of those without, although satisfaction for both groups has increased at a similar rate over time.

Somewhat fewer reported experiencing issues with their smart meter¹⁹: Overall, a sizeable minority of 32% of smart meter customers reported experiencing issues with their meter in the last three months, though this is lower than the 35% who did so in July 2024.

¹⁹ To note: this may be an issue with the smart meter itself or the in-home display (IHD). The IHD is a small electronic screen that connects wirelessly to the gas and electricity smart meters. They provide near-real time information about energy consumption in pounds and pence, so consumers can easily understand how to use less and save money on their bills.

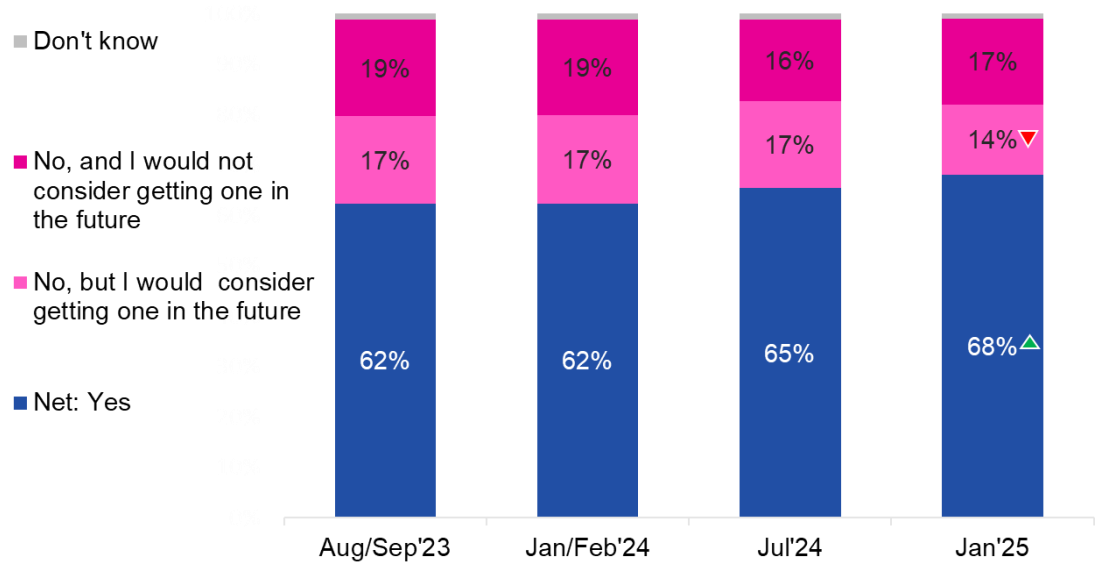
Smart meter households

Following an uplift in July 2024 in the proportion who reported that their household had a smart meter from 62% to 65%, there has been a further increase in January 2025 to 68%.

Among the 31% who said they do not own a smart meter, 46% said they would consider getting one in the future compared to 54% who said they would not consider getting one in the future. The proportion of those that would consider getting a smart meter in the future has decreased compared to the previous wave.

This is consistent with official figures on smart meter installations in Great Britain (66% in Q4 2024).²⁰

Figure 42: Consideration of getting a smart meter



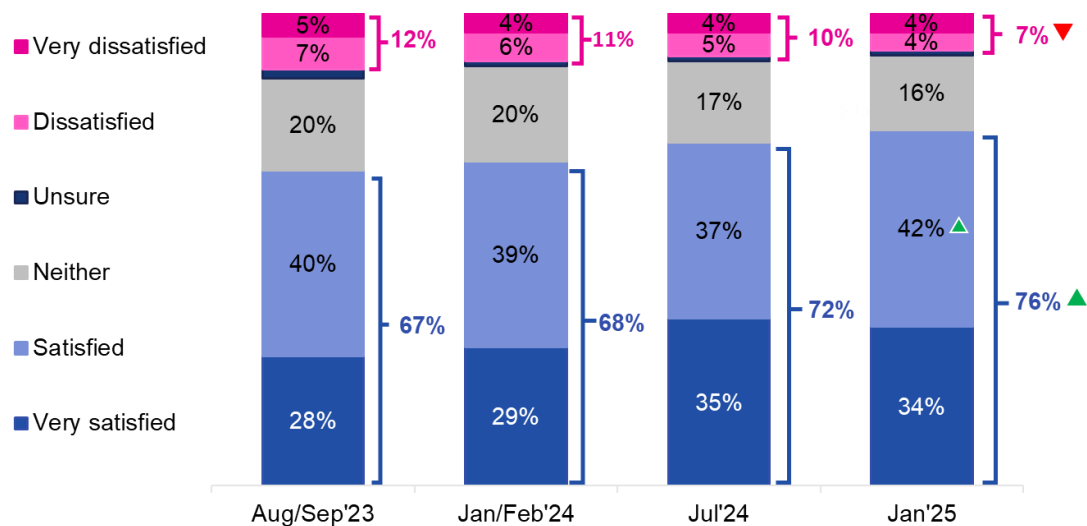
Source: C1. Do you have a smart meter in your household? Base: All respondents: Jan'25 (3,854), Jul'24 (3,750), Aug/Sep'23 (3,855), Jan/Feb'24 (3,742). Significance is marked versus the previous wave only. Data labels below 3% not shown.

²⁰ See: [Smart meters in Great Britain, quarterly update March 2025](#)

Satisfaction with smart meters

Not only has smart meter ownership gone up, but satisfaction with smart meters has also continued to increase, from 72% in July 2024 to 76% in the January 2025, driven by an increase in those satisfied (from 37% to 42%). At the same time, those who report being dissatisfied with their smart meter has continued to decrease over time, now at 7%.

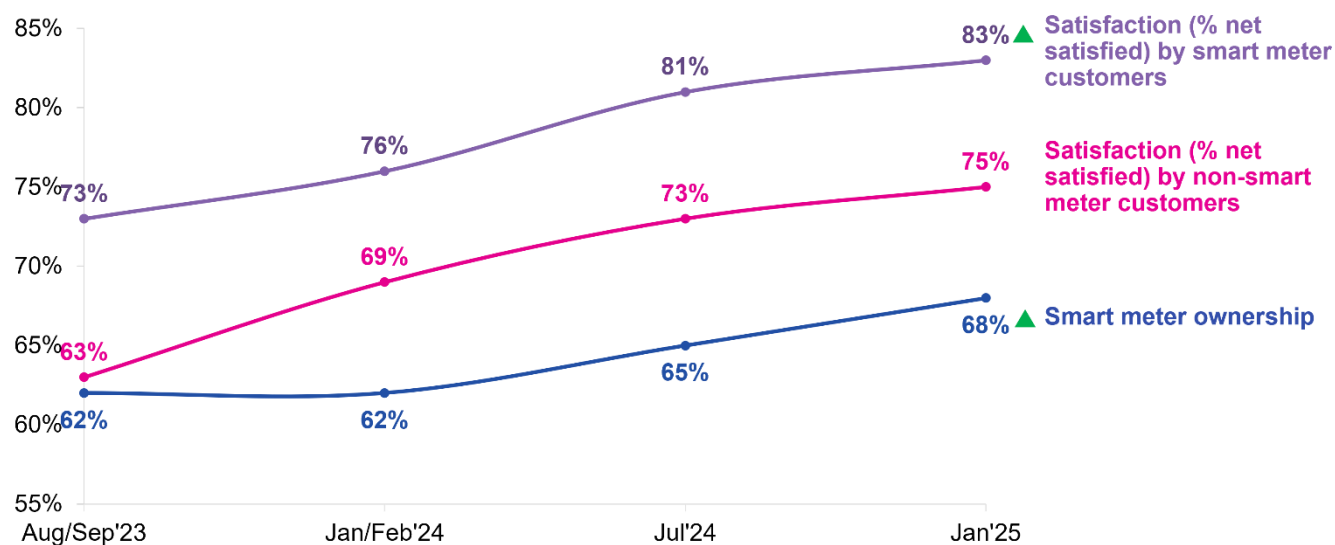
Figure 43: Satisfaction with smart meter



C6. Overall, how satisfied or dissatisfied are you with your smart meter?
Base: Those with a smart meter: Jan'25 (2,577), Jul'24 (2,403), Aug/Sep'23 (2,350), Jan/Feb'24 (2,248).
Significance is marked versus the previous wave only. Data labels not shown for values below 3%

Those with smart meters have consistently reported a higher level of overall supplier satisfaction compared to non-smart meter households (83% cf. 75% in January 2025), although overall satisfaction has increased at a similar rate for both groups.

Figure 44: Overall supplier satisfaction by non/smart meter customers



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

Base: Those with a smart meter: Jan'25 (2,629), Jul'24 (2,457), Jan/Feb'24 (2,404), Jul/Sep'23 (2,337), Those without a smart meter: Jan'25 (1,186), Jul'24 (1,255), Jan/Feb'24 (1,406), Jul/Sep'23 (1,361).

C1. Do you have a smart meter in your household?

Base: All respondents: Jan'25 (3,854), Jul'24 (3,750), Aug/Sept'23 (3,855), Jan/Feb'24 (3,742)

Sharing smart meter data

Smart meter customers are increasingly willing to share their smart meter data with their supplier compared to August/September 2023 and January/February 2024 (though January 2025 figures are in line with those reported in July 2024).

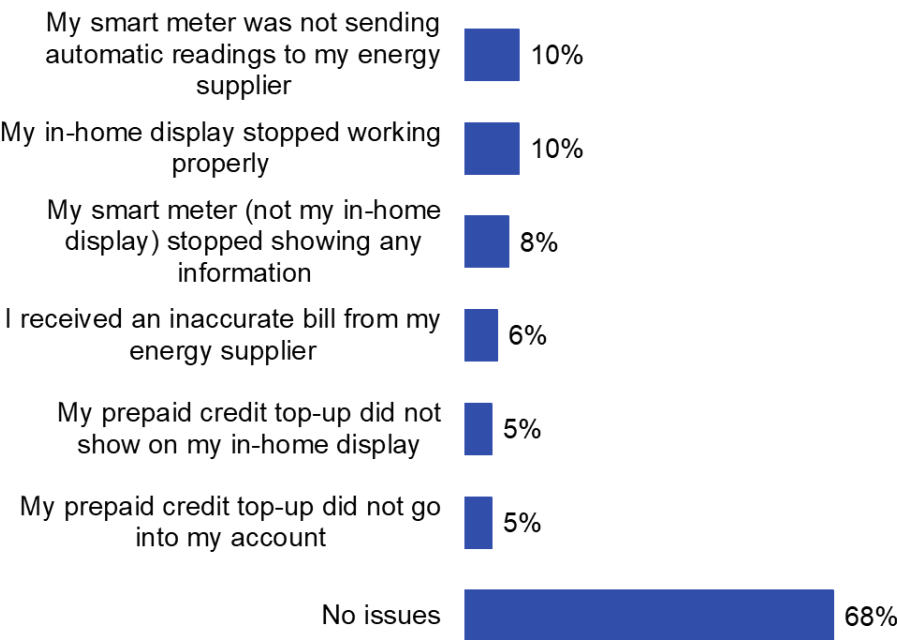
- 84% said they would be willing to share their data to receive information about tariffs that are tailored to their energy use and that could save them money
- 78% said they would be willing to share their data to provide information on how people are using energy, improving the efficiency of the network and potentially reducing energy bills for all consumers
- 77% said they would be willing to share their data to receive suggestions on how to be more energy efficient
- 72% said they would be willing to share their data to identify if they need any support with their bills

Issues with smart meters

Overall, 32% of respondents with smart meters reported experiencing at least one issue in the last three months, which is lower than the 35% who did so in July 2024.

Of the issues experienced, the most reported issues were that the smart meter was not sending automatic readings to their supplier (10%), the in-home display stopped working properly (10%), or the smart meter stopped showing any information (8%). These issues remain in line with previous waves.

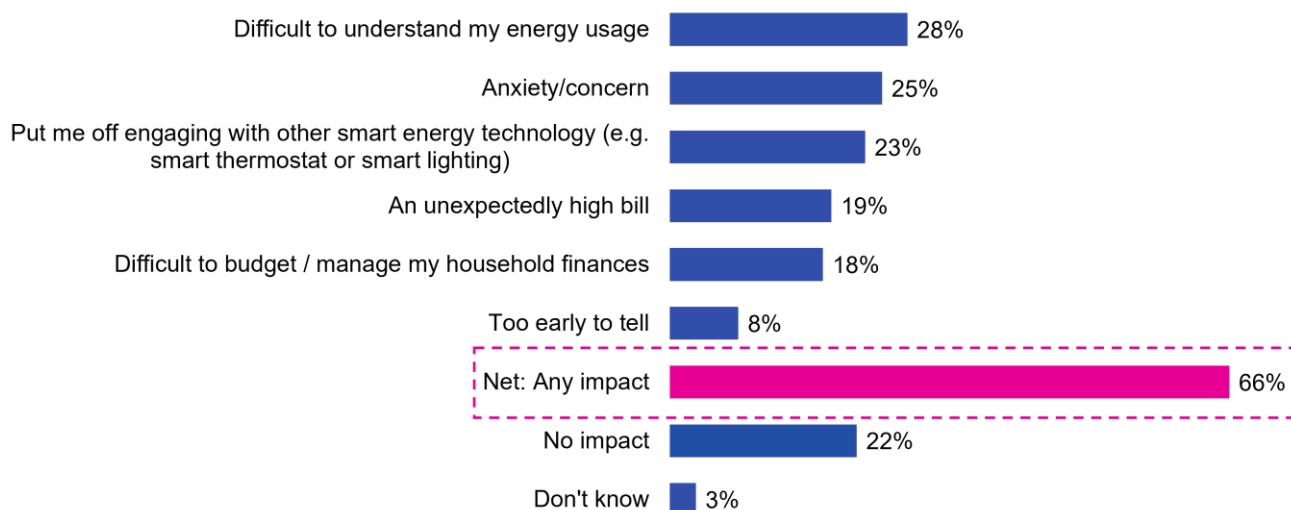
Figure 45: Experiences of issues with smart meter in the last three months



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: Jan'25 (2,577)

Among those who reported an issue with their smart meter in the last three months, two thirds (66%) identified an impact on them or their household, most commonly that it made it difficult for them to understand their energy usage (28%), that it caused them anxiety/concern (25%) and that it put them off engaging with other smart technology (23%).

Figure 46: Impact of issues with smart meter



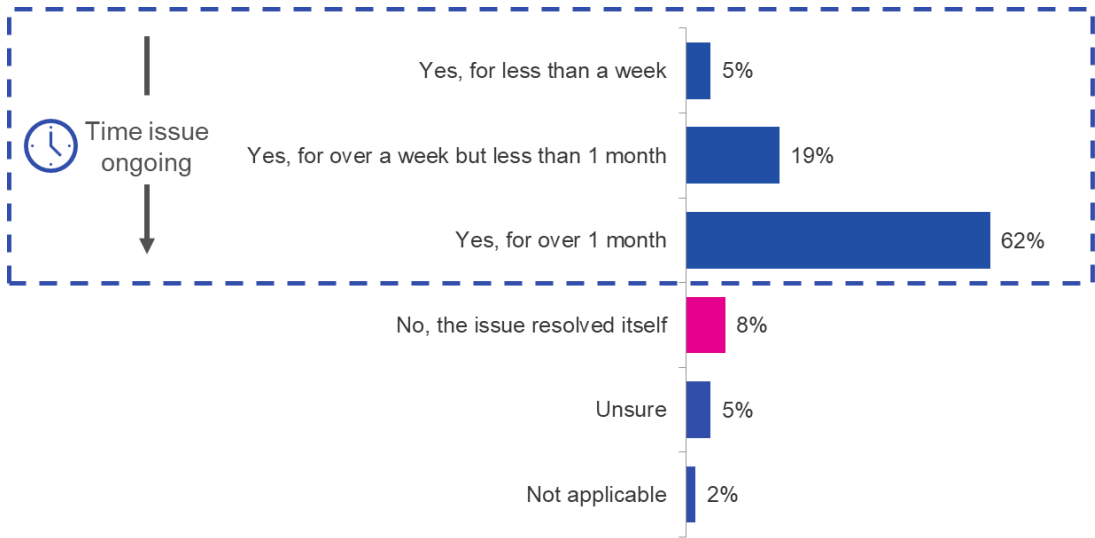
C9B: What type of impact, if any, did the issue have on you and/or other people in your household?

Base: Had an issue in the last 3 months with smart meter (859) This question was asked for the first time this wave.

Among those that reported recent issues with their smart meter, a third of these (32%) said that the issue was unresolved or was still being dealt with. We do not know how many people tried to get their issue resolved by contacting their supplier or taking other steps to resolve this.

Among this group, close to two in three (62%) said the issue had been going on for over a month. Please note that question 9C “Would you say this issue is still ongoing?” was newly asked in this wave as a pilot. The question was only asked of those who said the issue they experienced wasn’t resolved or is still being dealt with. This means that we do not know what the average duration is for a smart meter issue, we only know of those who either didn’t attempt to resolve it or who have had an issue which has not yet been resolved. It is possible that the latter may be skewed to those who have complicated problems, therefore they are likely to experience longer lengths. In the future waves of this survey, this will be adjusted to ask all those who encountered an issue, even if it is resolved at the time of being surveyed so we can explore this more fully.

Figure 47: How long issues with smart meter lasted for those whose issues are unresolved or still being dealt with.



C9C: Would you say this issue is still ongoing?
Base: Issue not resolved or still being dealt with (254).

Priority Services Register (PSR)

Overview of findings

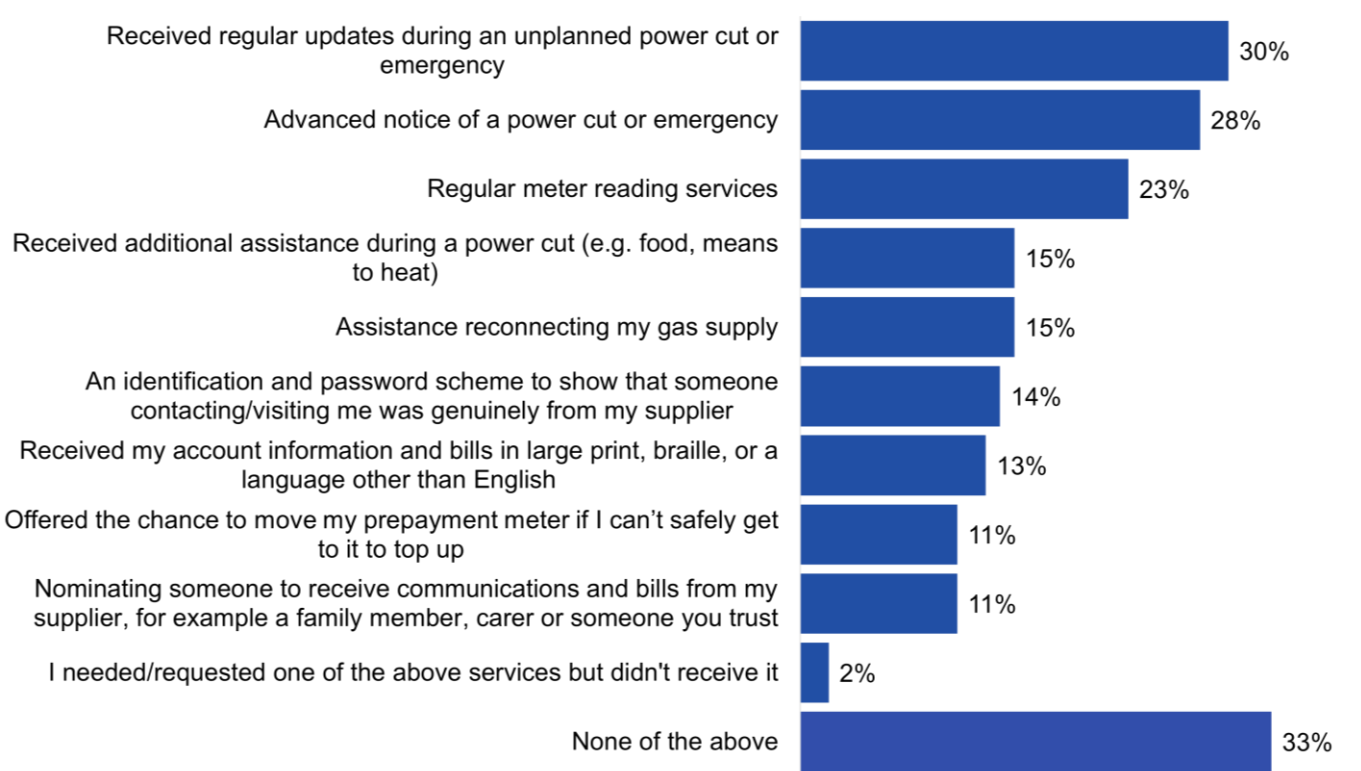
- **Consistent with previous waves, a third of consumers reported that they or a member of their household was on the PSR:** two thirds (67%) of those on the PSR reported receiving a service from it in the last six months.
- **Satisfaction with the services received by being on the PSR has stabilised:** following an increase in satisfaction with services received on the PSR from 61% in January/February 2024 to 71% in July 2024, levels have remained stable in January 2025 (68%).

Services received from the PSR

Consistent with previous waves, a third (37%) of respondents in January 2025 reported that they or a member of their household was on the PSR, and 67% of these reported receiving a service from it in the last six months, equating to 26% of the total sample.

The services most commonly received were reported to be regular updates during an unplanned power cut or emergency (30%), advanced notice of a scheduled power cut (28%) and regular meter reading services (23%).

Figure 48: Services received from the PSR

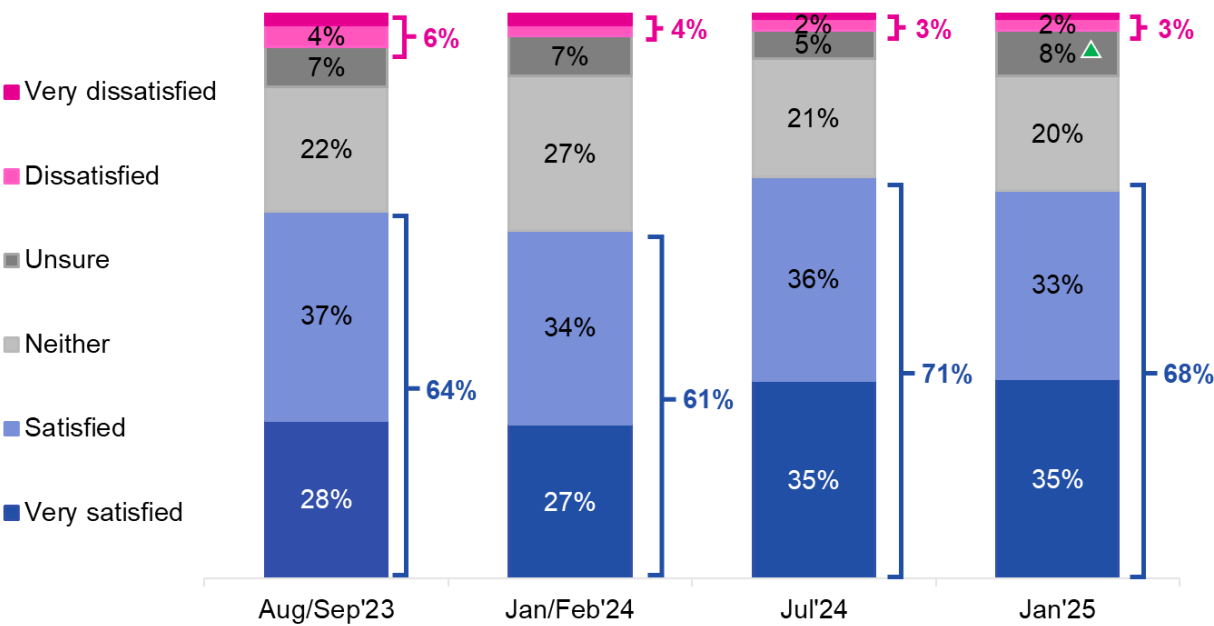


A8a: In the last 6 months, which of the following services have you received from the Priority Services Register?
Base: Those on the Priority Services Register (1,445)

Satisfaction with the services received by being on the PSR

Among those who reported that their household was on the PSR, two thirds (68%) were satisfied with the services they had received, which is in line with July 2024 (71%). Therefore, the uplift in satisfaction recorded between January/February 2024 (61%) and July 2024 remained in place in January 2025.

Figure 49: 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: Jan'25 (1,445), Jul'24 (1,340), Jan/Feb'24 (1,266), Aug/Sep'23 (1,326). Significance is marked versus the previous wave only.

Switching

Overview of findings

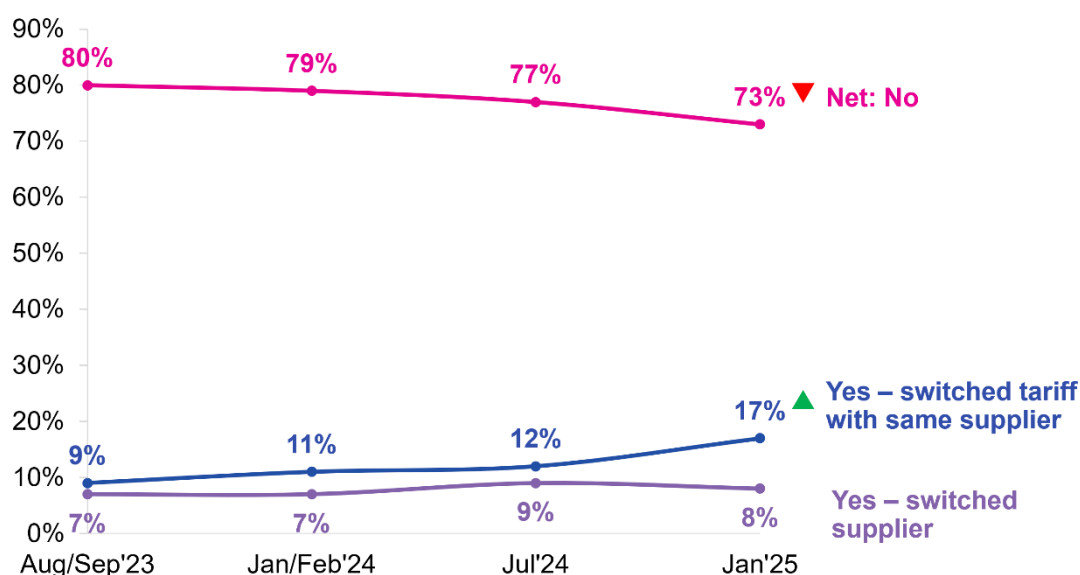
- **Switching tariff with the same supplier has become more prevalent:** the share of consumers reporting having switched tariff with the same supplier in the last year has increased from 12% in July 2024 to 17% in January 2025. Overall satisfaction is higher — and rising — among those who've switched tariffs with their existing supplier (87% cf. 80% in July 2024), suggesting that greater engagement with new tariff options is helping drive the wider uplift in satisfaction.
- **Satisfaction with the supplier switching process was stable:** among those who told us they had switched supplier, four in five (80%) were satisfied with the ease of comparing suppliers and 86% were satisfied with the switching process overall.

Switching behaviour in the last year

The proportion who reported having switched tariff with the same supplier in the last year has increased from 12% in July 2024 to 17% in the January 2025, and a further 8% reported switching supplier, in line with July 2024 (9%).

The fact that there has been an upward trend in the proportion on fixed tariffs, from 36% in August/September 2023 to 53% in the latest wave for electricity, and from 31% to 45% for gas, suggests that Ofgem's and suppliers' encouragement to switch to fixed tariffs has been heeded.²¹²² Additionally, in January 2025 there was a greater proportion of those who have switched tariff with the same supplier that are on a fixed tariff (26% for gas, 25% for electricity) compared to the same group in July 2024 (18% for gas, 19% for electricity).

Figure 50: Switching behaviour in the last year



F1: In the past 12 months, have you chosen to either switch your energy supplier, or switch your energy tariff but stay with the same supplier?

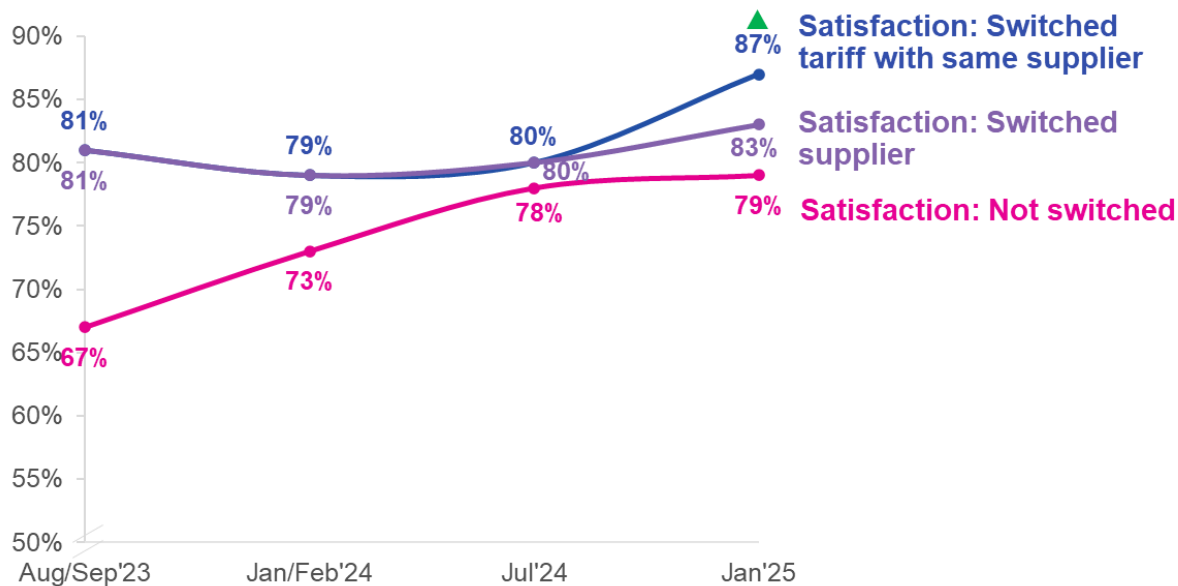
Base: All respondents: Jan'25 (3,854), Jul'24 (3,750), Jan/Feb'24 (3,855), Jul/Sep'23 (3,742).

Overall satisfaction recorded among those that have switched tariff with the same supplier has seen an uptick in January 2025, now at 87% compared to 80% in July 2024. Satisfaction among this group is now higher than those who have switched supplier (83%) and those who have not switched (79%), with the gap in satisfaction between each group widening compared to July 2024. The increase in satisfaction recorded among those that have switched tariff with the same supplier suggests that a greater engagement with new tariffs or tariff options contributes to a wider uplift in overall satisfaction.

²¹ [Energy price cap: People should consider fixing bills, Ofgem says - BBC News](#)

²² Note that there is a notable gap between those who say they are on a fixed tariff vs. the official reported figures, therefore these figures should be treated with caution.

Figure 51: Overall satisfaction by switching actions

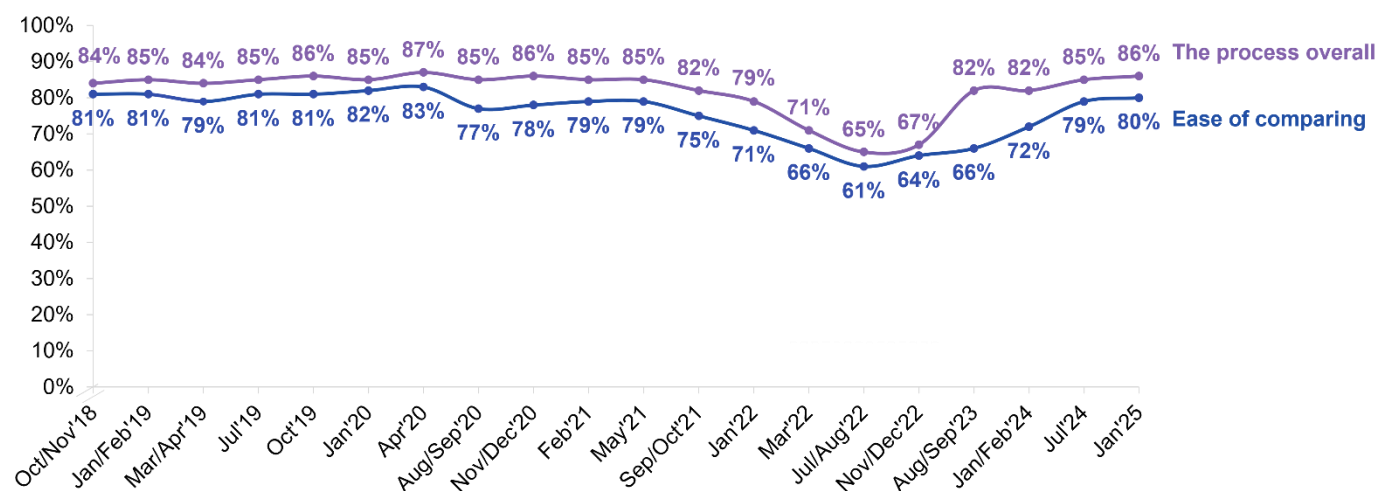


A5: Overall, how satisfied or dissatisfied are you with <A3/A4 SUPPLIER> as your supplier of <FUEL TYPE>?
 Base: Yes – switched supplier: Jan'25 (321), Yes – switched tariff: Jan'25 (611), No – not switched: Jan'25 (2,845),

Satisfaction with aspects of switching supplier

Among those who reported that they had switched supplier, four in five (80%) were satisfied with the ease of comparing suppliers and their prices, while just one in ten (7%) were dissatisfied with this. Regarding the switching process overall, 86% were satisfied and 5% were dissatisfied. Both of these aspects of switching satisfaction were in line with July 2024.

Figure 52: 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 (321). Intervals between surveys vary. Significance is marked versus the previous wave only.

Appendix

Defining financial vulnerability 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 rising financial pressures, we have combined three metrics – saving, debt and unexpected expenses – into classifications of financial vulnerability. These categories are defined as the following:

- **highly financially vulnerable** – those not able to save, and who cannot afford an unexpected but necessary expense of £850 and who are borrowing more than usual
- **financially 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

26% of respondents could not be classified due to answering 'don't know' or 'prefer not to say' to one or more classification questions. BMG has conducted an exercise to reduce the proportion of those unclassified by modelling the likely classification for respondents who did not produce a valid answer to one question only.



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