Consumer Impacts of Market Conditions Survey

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Wave 6: Fieldwork conducted in January/February 2025

Prepared by BMG for Ofgem

BMG an RSK company

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Ofgem foreword

As the nation is moving on from the energy price peaks of 2023 and 2024, many households still find it challenging to cope with high energy prices.

Ofgem remains steadfast in its commitment to protecting energy customers, with a keen focus on enhancing support for those in vulnerable circumstances. To do this, it is vital we understand consumers' needs and experiences. One of the ways that Ofgem does this is through consumer research.

The Consumer Impacts of Market Conditions (CIM) survey is crucial for Ofgem's efforts to understand energy consumers' views on and experiences of the energy market. Ofgem is committed to putting the consumer voice 'front and centre' in energy policy in Great Britain. This survey is a vital way for Ofgem to listen to what customers need from, what they think about and how they are experiencing the energy market. It is also a critical tool to help Ofgem understand how consumers' behaviours change over time and the experiences of consumers in vulnerable circumstances.

The core topics of affordability, sources of support, payment and tariff preferences, sectoral trust, and energy market engagement remain at the forefront of this research. However, we continually expand our scope to include additional topics that reflect the current energy landscape.

This wave, we introduced two broad areas. The first adding questions to delve deeper into energy market engagement, adding questions around experiences after consumers switch and historic engagement with market. The second around energy pricing, including understanding of standing charges and price stability preferences.

The next wave of the CIM survey is planned for early 2026. This is part of Ofgem's ongoing efforts to listen to the voices of energy consumers, act on the findings, and embed them in energy policy; all while preparing for the energy customer of the future and working towards a fairer and more sustainable energy system for Great Britain.

Executive summary

The Consumer Impacts of Market Conditions Tracking Survey is designed to provide Ofgem, and the wider energy sector, with a good understanding of domestic consumers' experiences and attitudes of the energy market. The first wave of the survey began post-energy crisis (March 2022) and in the waves that followed, the energy market experienced significant variability. This is now the sixth wave of the project and reflects a more settled period in the energy market, however it is still important to monitor consumers' experiences. The survey takes a mixed mode approach to data collection, utilising online and face-to-face interviewing. This wave of the project comprises 3,458 interviews with a representative sample of adults. The key findings are described below.[1]

Financial pressures are easing but energy bill pressures remain

Looking at the Financial Vulnerability Classification [2], an increasing number of respondents were classified as 'doing well' financially, increasing from 35% in January 2024 to 41% in January/February 2025. Additionally, a greater number of consumers reported no difficulties in keeping up with their household bills (increasing from 35% in January 2024 to 38% in January/February 2025).

However, energy bills remain a significant challenge, with half of respondents still struggling to manage these - and a higher proportion falling behind on energy bills compared to any other type of bill. Moreover, the share experiencing more severe energy affordability issues has risen since January 2024, such as being contacted by a debt collection agency (from 3% to 5% across all payment types).

Increasing supplier awareness of affordability issues

Compared to last year, consumers overall were more likely to be reaching out to their suppliers for information, advice or support with paying their energy bills (from 27% in January 2024 to 34% in January/February 2025).

This overall rise in contact for information, advice or support has been driven by those who are not currently experiencing impacts of energy affordability issues (rising from 11% in January 2024 to 14% in January/February 2025). Meanwhile, of those who reported that they have experienced recent impacts of energy affordability issues, fewer have contacted someone for information, advice or support with paying their energy bills compared to last year (from 53% in January 2024 to 43% in January/February 2025).

[1] Full details of the sampling approach used can be found in the Technical Report.
[2] The Financial Vulnerability Classification combines three metrics – saving, debt and unexpected expenses – into classifications of financial vulnerability. Further details on how this is calculated can be found in the appendix.

Additionally, three out of four (74%) consumers who are behind on their energy bills reported that their supplier is aware of their affordability challenges—a notable rise from the previous year (62%).

Direct debit consumers continued to face fewer affordability challenges than other payment methods.

Standard credit consumers are more open to changing how they pay

The survey examined customers' views to different payment methods, whether they would be willing to pay in different ways, and how these views differ based on their payment method.

Across payment methods, Standard Credit consumers expressed the strongest desire to change their payment approach, a sentiment that has grown since January 2024 (from 22% to 35%).

However, one quarter (26%) of Standard Credit consumers said that if they were required to change payment method, it would be a big inconvenience/cause significant difficulties – with 7% saying this would cause them significant difficulties. Standard credit consumers with greater financial vulnerability were more likely to say that a change in their payment method would cause them significant difficulties (14%).

Higher self-reported knowledge of energy (or energy literacy) is linked to greater trust and engagement

When asked about their understanding of statements related to energy literacy - examples of this include understanding the different ways to pay energy bills and the different types of tariffs available – more respondents claimed to have good understanding than a poor one- with claimed understanding lowest for how energy prices are set and who decides them (39% of consumers said they understand this well).

Analysis by energy literacy quartiles revealed stark differences: those in the most energy-literate group were far more likely to engage with the market, trust suppliers and the sector, and were less likely to face financial difficulties. In contrast, those with the lowest energy literacy are more likely to be in a vulnerable situation, behind on bills, and less engaged.

Importantly however, these energy knowledge measures are self-reported and point to a confidence in understanding rather than measuring genuine knowledge. There are areas throughout the survey which indicated that there is low consumer understanding of how the energy market works. For example, 1 in 10 believed they do not pay a standing charge and there was a considerable degree of overclaim for consumers thinking they were on fixed tariffs.

Tariff types are a growing consideration for switching deals, but getting a cheaper tariff remains top

More consumers reported either being on a fixed tariff or actively seeking one, but self-reported rates remain much higher than official data, pointing to possible consumer misunderstanding.

Tariff types and preferences have grown in importance when looking for new deals. For example, tariff-related motivations for switching in the future have increased since January 2024 (from 74% to 78%). Examples of tariff-related motivations to switch include if consumers can get a Time of Use tariff and if they can get a fixed term tariff.

For those who have compared or switched recently, finding a cheaper tariff remains the top motivation.

Intentions to switch are on the rise

Compared to last year, there was a greater proportion of consumers who said that they switched tariff with the same supplier (from 12% to 17%).

There was also an increased interest in switching to a new tariff with their current supplier in the near future at over one quarter (28%) of consumers – this has now returned to previous levels following a dip in January 2024.

Consumers report cheaper tariffs when switching

Those who have switched reported similar or better experiences with their new supplier (e.g. a better price). This is echoed in that three in four (77%) of those who switched (supplier or tariff) reported saving money as a result.

However, there are still several perceived barriers to engaging in the market, such as finding the energy market complex and difficult to understand and that the process of switching suppliers takes a lot of time/effort.

Trust in the sector is improving

As outlined in Ofgem's Energy Consumer Satisfaction Survey (ESAT) (latest report found here), consumer satisfaction with energy suppliers has risen from 78% in July 2024 to 81% in January 2025.

Trust in energy suppliers more generally has also increased, now drawing level with water companies – though it still lags behind banks and internet providers. As we've seen, fewer consumers are facing financial difficulties, and more are able to pay their bills on time. This, coupled with increasing energy supplier satisfaction, could be contributing to improved levels of trust in the market despite concerns that energy prices might rise in the future.

Consumers are not willing to pay more to reduce frequency of price changes

There was a reluctance among consumers to accept any increase in their bill in exchange for the price cap to be changed less frequently, as seven in ten (71%) said they would not accept an increase.

A handful of respondents said they would be willing to accept an increase – 6% said they would accept a maximum of £10 more, 3% said they would accept a maximum of £20 and 4% said they would accept a maximum of £40.

Background, research objectives and method

Background

Ofgem commissioned BMG to launch the Household Consumer Impacts of Market Conditions Tracking Survey in early 2022 to build understanding of consumers' experiences and attitudes during a period of market volatility. Though the market has evolved and begun to stabilise, it is still vital to track consumer perceptions and experiences of the energy market.

This report summarises the findings from the sixth wave of the survey, carried out in January/February 2025, drawing comparisons with previous waves where relevant.

Reports and data tables for those previous waves can be found through the following links:

- Waves 1 and 2
- Wave 3
- Wave 4
- Wave 5

Research objectives

This research is intended to:

- measure overall consumer awareness, perceptions and experiences relating to changes in the energy market
- analyse how different audiences have been affected by these changes
- track how awareness, perceptions and behaviours vary over time

In the latest wave, new questions have been added to the survey focusing on:

- changing payment methods
- self-reported energy market literacy and confidence[3]
- understanding of standing charges
- monthly energy spend
- historic market engagement
- differences in consumer experience after switching supplier
- how cost savings impact on market engagement
- price stability preferences
- numeracy skills
- personality traits

[3] Throughout this report, we highlight differences in 'high' and 'low' energy market literacy groups where relevant. However, this metric is self-reported by consumers and points to a degree of confidence in their knowledge and understanding of the market. Therefore at times, there is a conflict between genuine energy literacy and perceived energy literacy.

Method

Timing of fieldwork

Fieldwork timings for each of the four waves were as follows:

- Wave 6: 17 January to 7 February 2025
- Wave 5: 12 January to 1 February 2024
- Wave 4: 3 to 20 July 2023
- Wave 3: 21 November to 11 December 2022
- Wave 2: 4 to 31 July 2022
- Wave 1: 18 to 31 March 2022

Data collection method

The survey takes a mixed methods approach to data collection by utilising three main approaches:

- online surveys via online panels to capture the digitally enabled general population
- online river sampling to capture those digitally enabled but less present on panels
- face-to-face interviews to ensure the inclusion of the digitally excluded. Previous waves also included an element of telephone interviewing, which was discontinued in the latest wave

The table below summarises the sample sizes achieved by each data collection method at each wave. Wave 6 comprised 3,458 interviews consisting of 3,046 online, 210 online river sampling, 202 face-to-face interviews.

Table 1: Sample composition by method of data collection by wave

		Sample size					
Consumer type	Methodology	W1	W2	W3	W4	W5	W6
Digitally enabled general population	Online survey via online panels	3,208	3,087	3,035	3,000	2,947	3,046
Digitally enabled but less present on panels	Online survey via river sampling	54	271	221	233	292	210
Digitally excluded	Face to face and telephone interviews	217	202	201	201	200*	202*
Total	All combined	**3,479**	**3,560**	**3,457**	**3,434**	**3,439**	**3,458**

*All digitally excluded interviews conducted face to face since wave 5, with the telephone methodology discontinued.

Sample frame

Quotas and weights were set for age, gender, region, IMD and ethnicity. This represents a change from previous waves where targets were sourced based on the 2011 census, ethnicity was not included as a target/weight, and social grade (SEG) had been used instead of IMD.

This update in approach was made to ensure that the survey is as representative as possible of the current GB population. The impact of using IMD over SEG was tested and compared to ensure there was minimal impact on the data as a result of this change.

Notes on statistical significance

Given that the survey uses quotas rather than random probability sampling, statistical significance is indicative only. Where significant differences between sub-groups and the total sample are identified, 'total sample' represents the total sample minus the sub-group in question.

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

Unless stated otherwise, statistical significance is tested against the previous wave only.

A sample size of this magnitude carries a maximum margin of error of ±1.67% at the 95% confidence level.[4]

[4] 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 100 times, in 95 of these the true population parameter would fall within the calculated interval. This is a commonly accepted level of confidence in social research.

Respondent breakdown

Throughout this report, we pull out the differences in data by subgroups. Below is a breakdown of some key groups referred to throughout the report:

Table 2: Respondent breakdown by various metrics

Payment types					
Direct debit		**Standard credit**		**Prepayment meter**	
74%		13%		13%	
Tariff types (claimed)					
Fixed			**Variable**		
62%			38%		
Time of Use tariffs					
Net: Yes, Economy 7/10 meter		**Net: Yes**		**No**	
18%		35%		50%	
Smart meter ownership					
Yes			**No**		
64%			33%		

Table 3: Approximate spend on energy per month

Spend	Total
Less than £50 last month (under £600 a year)	6%
£50 – £99 last month (£600 - £1,199/year)	27%
£100 – £149 last month (£1,200 - £1,799/year)	29%
£150 – £199 last month (£1,800 - £2,399 a year)	17%
£200 – £299 last month (£2,400 - £3,599 a year)	11%
More than £300 per month (more than £3,600 a year)	4%

Don’t know / Prefer not to say	5%

Findings

Affordability: What impacts have rising costs had on consumers?

Overview of findings

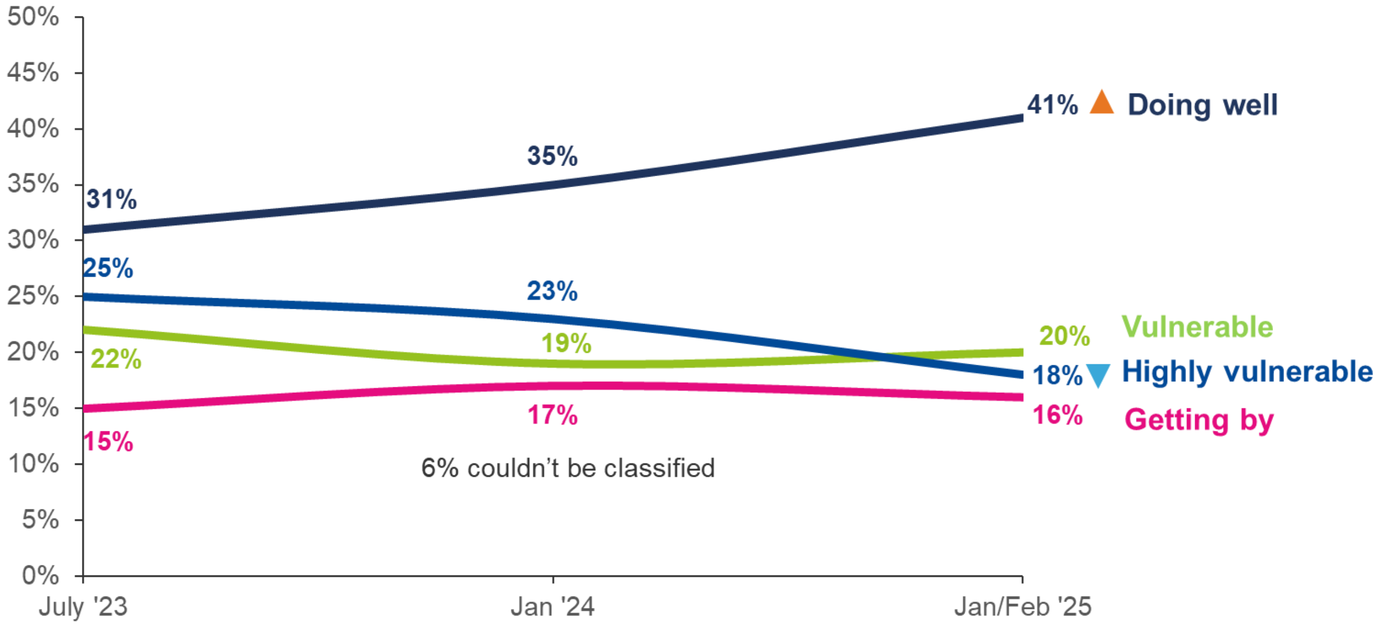
- **Financial pressures easing but energy bill pressures remain:** an increasing number of respondents were classified as ‘doing well’ financially as per the Financial Vulnerability Classification[5], and more individuals reported no difficulties in keeping up with their household bills. However, significant challenges remain - half of respondents still said they were struggling to manage their general household bills and credit commitments.
- **Affordability impacts rising:** although there are signs that financial pressures are easing for some consumers, there has been an increasing number of consumers who reported affordability issues beyond reducing their energy usage. The more severe actions included cancelling their direct debit (among direct debit consumers) and being contacted by a debt collection agency (among both direct debit and standard credit consumers).
- **Wider impacts of energy costs have reduced but still remain at high levels:** over two in three identified at least one impact on their wider household from increased energy costs, though this is the lowest figure recorded so far. Two in five reported being unable to keep rooms at a comfortable temperature all the time, rising to three in five of those considered the most financially vulnerable.
- **Consumers are still taking action to reduce their energy consumption:** although at a lower rate than in January 2024, a sizeable number of consumers have taken steps to reduce their energy use, such as turning off appliances and turning down radiators.
- **Expectations of short and long term price rises have increased:** two thirds said they believed energy costs would rise in both the short and the long term, with this view higher among the most financially vulnerable consumers.

Consumers in financially vulnerable situation

Compared to previous waves, the proportion classified in the Financial Vulnerability Classification ‘doing well’ group has increased to 41% (compared to 35% in January 2024 and 31% in July 2023). At the same time, the share of consumers in the ‘highly vulnerable’ category continued to fall to 18% (compared to 23% in January 2024 and 25% in July 2023). A breakdown of how the Financial Vulnerability Classification is calculated can be found in the appendix

[5] The Financial Vulnerability Classification combines three metrics – saving, debt and unexpected expenses – into classifications of financial vulnerability. Further details on how this is calculated can be found in the appendix.

Figure 1: Financial vulnerability groups as a share of the population

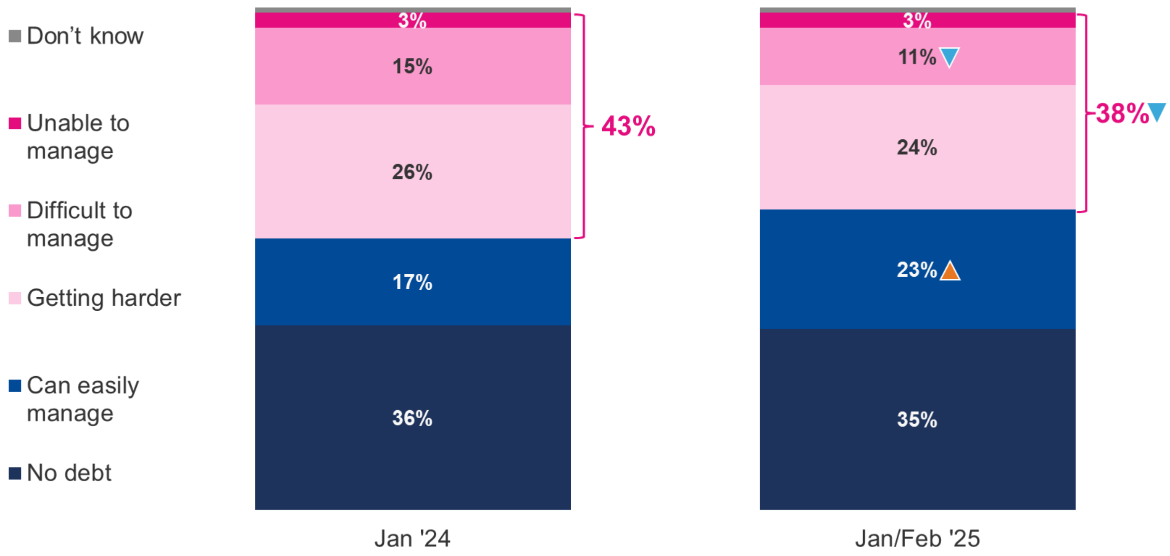


CL1: In view of the general economic situation, do you think you will be able to save any money in the next 12 months? / CL2: Could your household afford to pay an unexpected, but necessary, expense of £850? / CL3: Have you had to borrow more money or use more credit than usual in the last month, compared to a year ago?
Base: All Respondents (W4) 3,434 / Jan '24 (W5) 3,439 / Jan/Feb '25 (W6) 3,458

The apparent easing of financial pressures was also reflected in consumers' current situation in relation to general debt. The proportion who reported struggling to manage general debt over the past year reduced from 43% in January 2024 to 38% in January/February 2025. This drop was driven by an increase in those who said they can easily manage their debt (17% to 23%) and a decrease in those who said they find it difficult to manage their debt (15% to 11%).

Nevertheless, despite signs of financial pressures easing over time, a considerable number of respondents considered themselves struggling with their debt (38%) and therefore represents a sizeable proportion of the population.

Figure 2: Current situation in relation to debt level



CL3E. Which of the following statements best describes your situation in relation to your current level of debt?
Base: All respondents: Jan ‘24 (W5) 3,439 / Jan/Feb ‘25 (W6) 3,458

Direct debit consumers were more likely to report not being in general household debt (39%) compared to prepayment meter (24%) and standard credit consumers (26%). Both prepayment meter and standard credit users reported similar levels of finding debt difficult or unable to manage.

When zooming in on the demographic breakdown of each group with regards to debt:

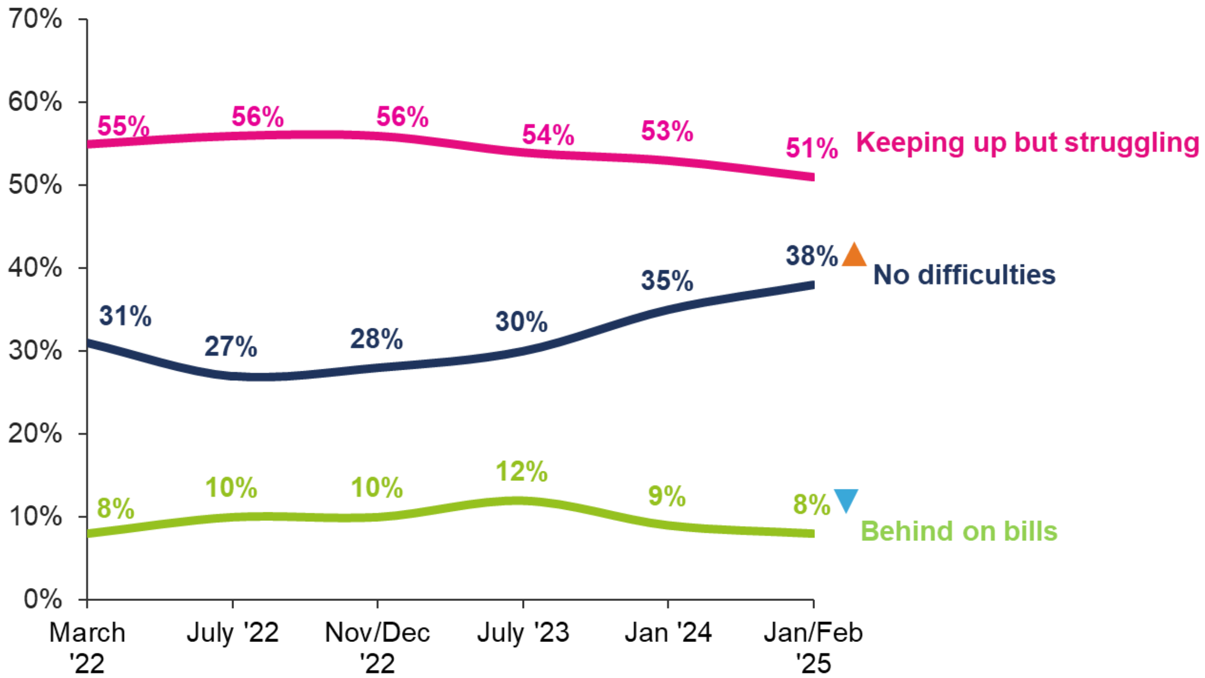
- those with **no debt** - tend to be middle-aged and older homeowners who pay via direct debit. Unsurprisingly, there is considerable crossover with the ‘doing well’ group as per the Financial Vulnerability Classification.
- can **easily manage** debt - tend to be middle-aged homeowners who pay via direct debit. 1 in 5 households either contain a pregnant mother or child(ren) under 5.
- debt is **getting harder** - tend to be middle-aged renters. There is a correlation with those in the ‘highly vulnerable’ group as per the Financial Vulnerability Classification.
- find it **difficult or unable to manage** debt – significantly higher proportion reporting a disability in the household (42%) compared to the national average (31%). There is significant crossover with the ‘highly vulnerable’ group as per the Financial Vulnerability Classification.

Keeping up with general household bills

Similar to general financial pressures and levels of debt, there has been a significant decline in those who reported being behind on their general household bills, from 9% in January 2024 to 8% in January/February 2025, as well as an increase in those who reported no difficulties (from 35% to 38%). However, 51% of respondents still reported that they were keeping up but struggling on top of the 8% who were behind.

This demonstrates that while financial pressures have eased since July '22, a significant proportion of the population continue to feel under pressure while keeping up with their bills.

Figure 3: Ability to keep up with general household bills and credit commitments



F5. Which one of the following statements best describes how well you are keeping up with your general household bills and credit commitments at the moment?
Base: All respondents: Mar '22 (W1) 3,479 / July '22 (W2) 3,560 / Dec '22 (W3) 3,457 / July '23 (W4) 3,434 / Jan '24 (W5) 3,439 / Jan/Feb '25 (W6) 3,458

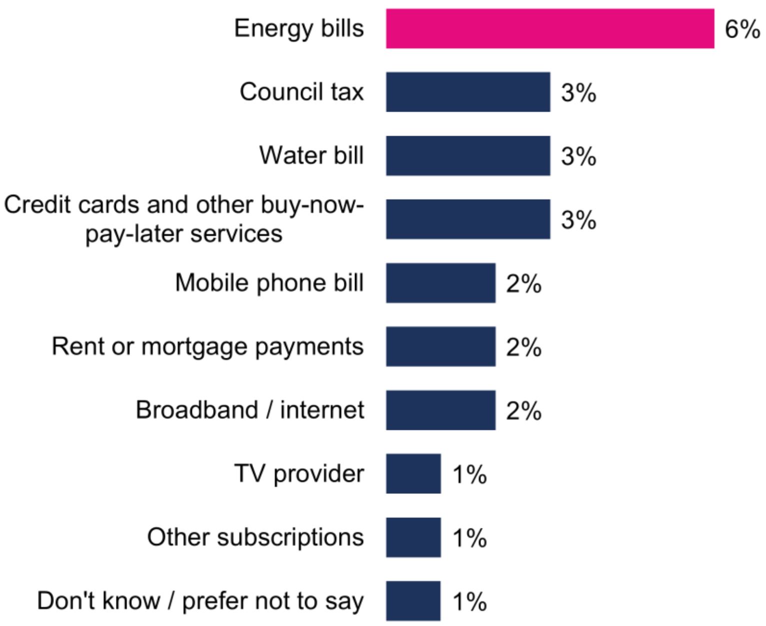
When considering the types of bills and credit commitments that consumers were more likely to report being behind on, energy bills were the most common, where 6% of consumers reported being behind. After energy bills, 3% of consumers reported being behind on their council tax, water and credit card bills (see figure overleaf).[6]

This is in line with findings from Citizens Advice in April 2024 where it was reported that energy debt was the most common type of debt that their specialists helped consumers with.[7]

[6] Note that the values shown in Figure 4 should be viewed with caution, as energy was asked of all respondents, while other types of bill were only asked of those who had fallen behind on at least some bills or credit commitments, with the figures then rebased against the full base size.

[7] The debt protection gap - Citizens Advice

Figure 4: Type of bills that have fallen behind on



F5A: And which one of the following statements best describes how well you are keeping up with energy bills specifically at the moment? / G3: Thinking about bills other than energy, which of the below types of bills or credit commitments are you behind on at the moment?
Base: All respondents Jan/Feb '25 (W6) 3,458

Keeping up with energy bills

When looking at energy bills specifically, compared to January 2024, there were fewer consumers who reported being behind on their energy bills, decreasing from 8% to 6% this wave, as well as those struggling with their energy bills (53% to 48%). At the same time, there has been an increase in the proportion who reported facing no difficulties (37% to 43%).

These changes in reported ability to keep up with bills reflects the pattern seen in changes to CPI gas and electricity prices, which have improved from January 2023 onwards, following increases since July 2021.[8]

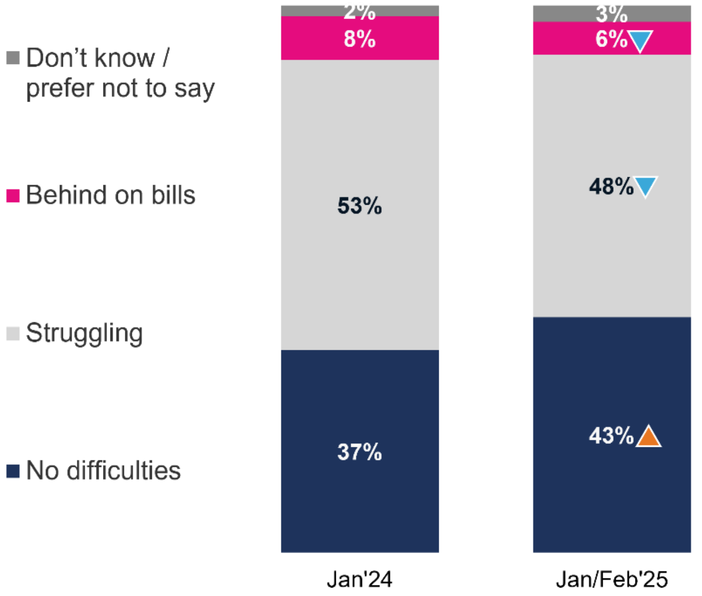
Despite this positive trend, over half of respondents still said they were behind or keeping up but struggling to pay their energy bills.

Groups who were more likely to report being behind on their energy bills included renters (10%), those with a disability in their household (11%), prepayment meter users (10%), standard credit users (11%), and those in the lowest energy literacy quartile (10%).

[8] ONS Inflation and Price Indices

Additionally, evidence from Ofgem suggests that the average amount of debt owed by consumers is growing over time.[9] Though our survey shows self-reported debt on a household basis (rather than the amount of debt), it's clear that a sizeable number of consumers are struggling to keep up with their energy bills.

Figure 5: Ability to keep up with energy bills

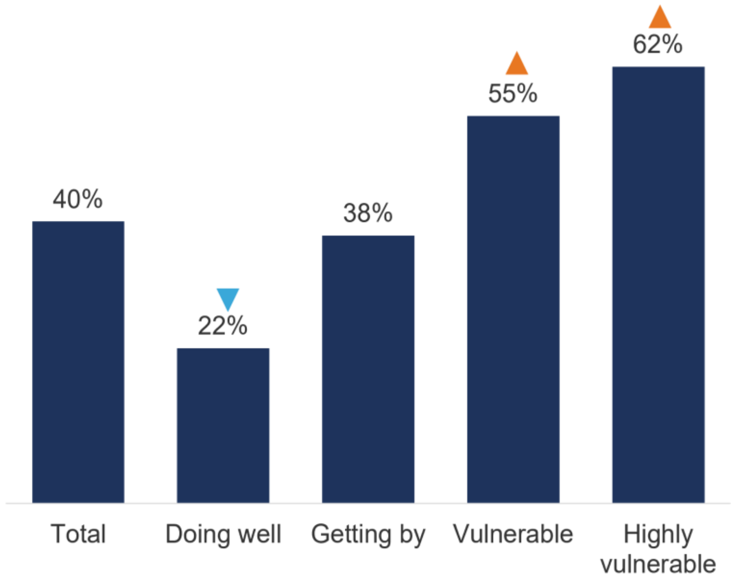


F5A: And which one of the following statements best describes how well you are keeping up with energy bills specifically at the moment?
Base: All respondents Jan '24 (W5) 3,439 / Jan/Feb '25 (W6) 3,458

Two in five (40%) reported being unable to keep rooms in their household at a comfortable temperature all of the time, a reduction on the 45% who did so in January 2024. However, this is higher among those in the bottom two financial vulnerability groups (55% for vulnerable; 62% for highly vulnerable), compared to just 22% of the doing well group.

[9] Debt and arrears indicators | Ofgem

Figure 6: Ability to keep rooms in household at a comfortable temperature by the Financial Vulnerability Classifications - sometimes/rarely/never able



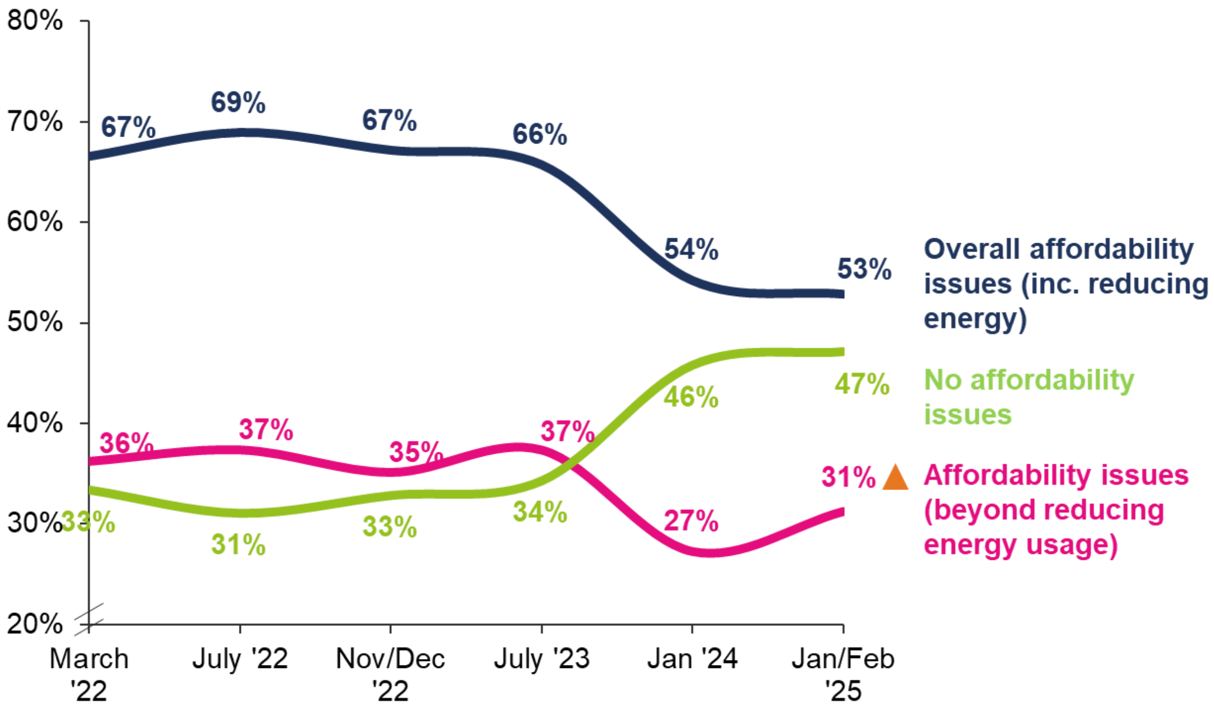
E25. How much of the time have you been able to keep the rooms you are using in your home at a comfortable temperature this month?
Base: All respondents Jan’24 (W5) 3,429 / Jan/Feb ’25 (W6) 3,458. Statistical significance tested against total at 95% confidence level.

Affordability issues

While overall affordability impacts have remained stable since January 2024 (53% this wave compared to 54% last wave), following a steep decline from 66% in July 2023, the proportion who reported experiencing affordability issues beyond reducing their energy usage increased from 27% to 31%.

Among the 31% who reported an affordability impact beyond reducing their energy use, close to half (46%) said they had faced similar energy affordability issues within the last two years, with this figure higher among those with the highest degree of financial vulnerability (53%).

Figure 7: Affordability issues in the last three months



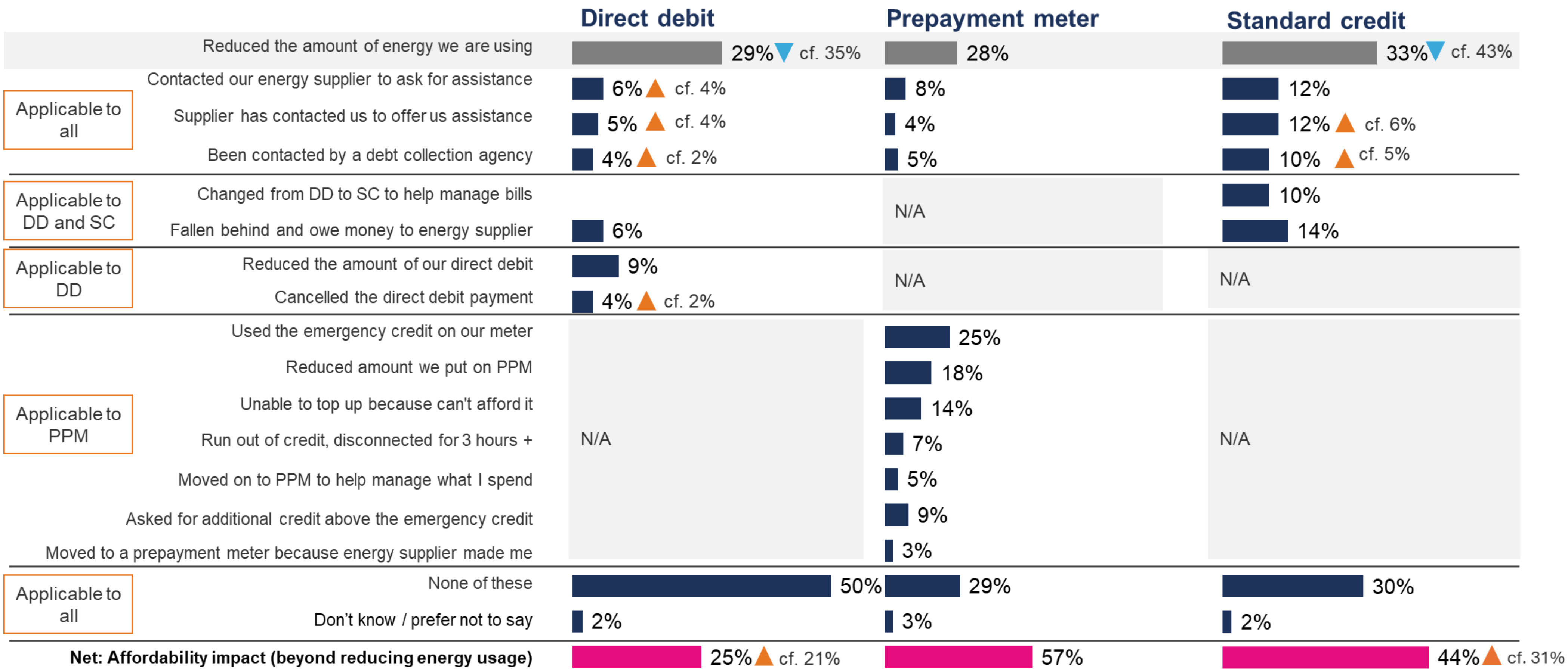
E3: Thinking about your energy bills over the last 3 months. Which, if any, of the following have happened to you or your household because of affordability issues?
Base: All respondents: Mar '22 (W1) 3,479 / July '22 (W2) 3,560 / Dec '22 (W3) 3,457 / July '23 (W4) 3,434 / Jan '24 (W5) 3,439 / Jan/Feb '25 (W6) 3,458

Those paying their energy bills via prepayment meter or standard credit remained more likely to report a narrow affordability impact (i.e. issues other than reducing energy use) than those paying via direct debit (57% and 44%, respectively, compared to 25%). Those paying via direct debit and standard credit both saw an increase in this respect since January 2024 (from 21% to 25% for direct debit and from 31% to 44% for standard credit).

As shown in the figure overleaf, the rise in affordability impacts beyond reducing energy usage was due to several factors, including some that are more severe. For example, there has been a greater proportion of direct debit and standard credit consumers who have been contacted by a debt collection agency (from 2% to 4% for direct debit and 5% to 10% for standard credit) and a growing number of direct debit consumers who have cancelled their direct debit payment (from 2% to 4%).

However, there are also factors that could be seen in a more positive light - such as greater contact about assistance from suppliers. This increase in communication between suppliers and consumers is also explored in the next chapter.

Figure 8: Affordability issues in the last three months by payment type



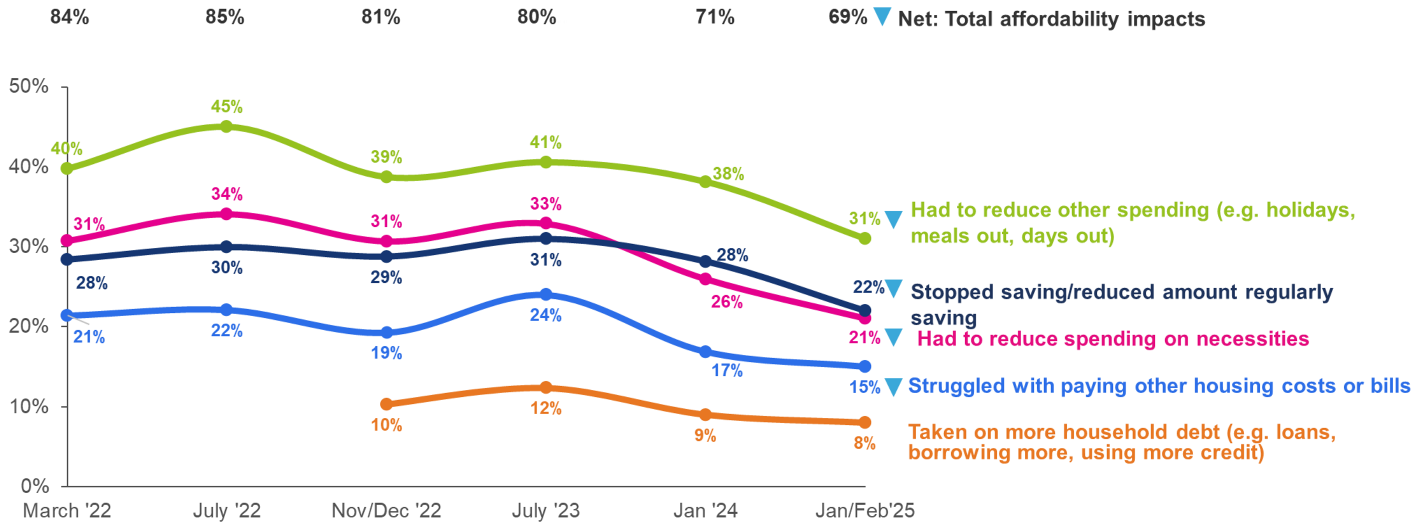
E3: Thinking about your energy bills over the last 3 months. Which, if any, of the following have happened to you or your household because of affordability issues?
Base: Direct debit (2,483); standard credit (438); prepayment meter (491)

The proportion who reported being impacted by the increased costs of home energy has continued to reduce, from 80% in July 2023, to 71% in January 2024, to 69% in the latest wave. Nevertheless, this represents just over two thirds of consumers.

Compared to January 2024, there have been decreases in the proportion who reported the following wider affordability impacts on their household:

- had to reduce other spending (e.g. holidays, meals out, days out) (from 38% to 31%)
- stopped saving/reduced amount regularly saving (from 28% to 22%)
- had to reduce spending on necessities (from 26% to 21%)
- struggled with paying other housing costs or bills (from 17% to 15%)

Figure 9: Wider household affordability impacts of increased costs of home energy (selected impacts shown)[10]



E2. What impacts, if any, have the increased costs of home energy had on your household? Base: All respondents: March ‘22 (W1) 2,500 / July ‘22 (W2) 2,791 / Dec ‘22 (W3) 3,457 / July ’24 (W4) 3,434 / Jan '24 (W5) 3,349 / Jan ‘25 (W6) 3,458

[10] Note that comparison with March and July 2022 should be viewed with caution, as this question was only asked of those who reported paying more for their energy, whereas in more recent waves it was asked of all respondents.

Actions taken to reduce the cost of energy

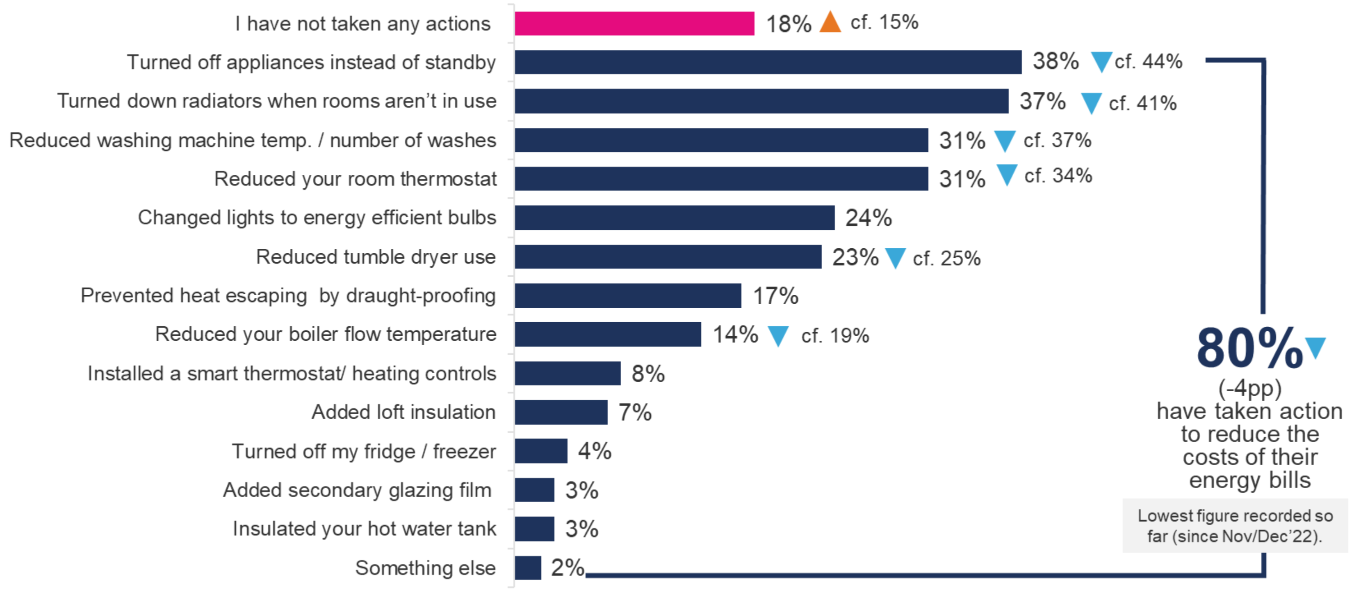
Overall, the majority (80%) of consumers reported having taken some action to reduce the cost of their energy bills, however this has dropped by 4 percentage points compared to January 2024 and is the lowest figure recorded so far (since November/December 2022). This has been driven by declines in those who reported the following (brackets indicate change from January 2024 figures):

- turned off appliances instead of putting them on standby (from 44% to 38%)
- turned down radiators when rooms are not in use (from 41% to 37%)
- reduced washing machine temperature/number of washes (from 37% to 31%)
- reduced room thermostats (from 34% to 31%)
- reduced tumble dryer use (from 25% to 23%)
- reduced boiler flow temperature (from 19% to 14%)

Drops in actions taken to reduce the cost of energy could be due to sustained behavioural change.For instance, consumers may have maximised their ability to turn radiators down or use more energy efficient technology.

However, the fall in taking action is corroborated by other evidence from DESNZ, where it was reported in summer 2024 that the majority of consumers give a lot or fair amount of thought to saving energy use in their home – but similarly to our survey, this has been decreasing over time – from 87% in spring 2023 to 84% in summer 2024.[11]

Figure 10: Actions taken to reduce the cost of energy



[11] DESNZ Public Attitudes Tracker: Summer 2024 - GOV.UK

E20a. Which of the following actions, if any, have you taken in order to reduce the costs of your energy bills in the past 3 months?
Base: All respondents: Dec ‘22 (W3) 3,457 / July ‘23 (W4) 3,434 / Jan ‘24 (W5) 3,439 / Jan ’25 (W6) 3,458.

Expectations of changes in household energy costs

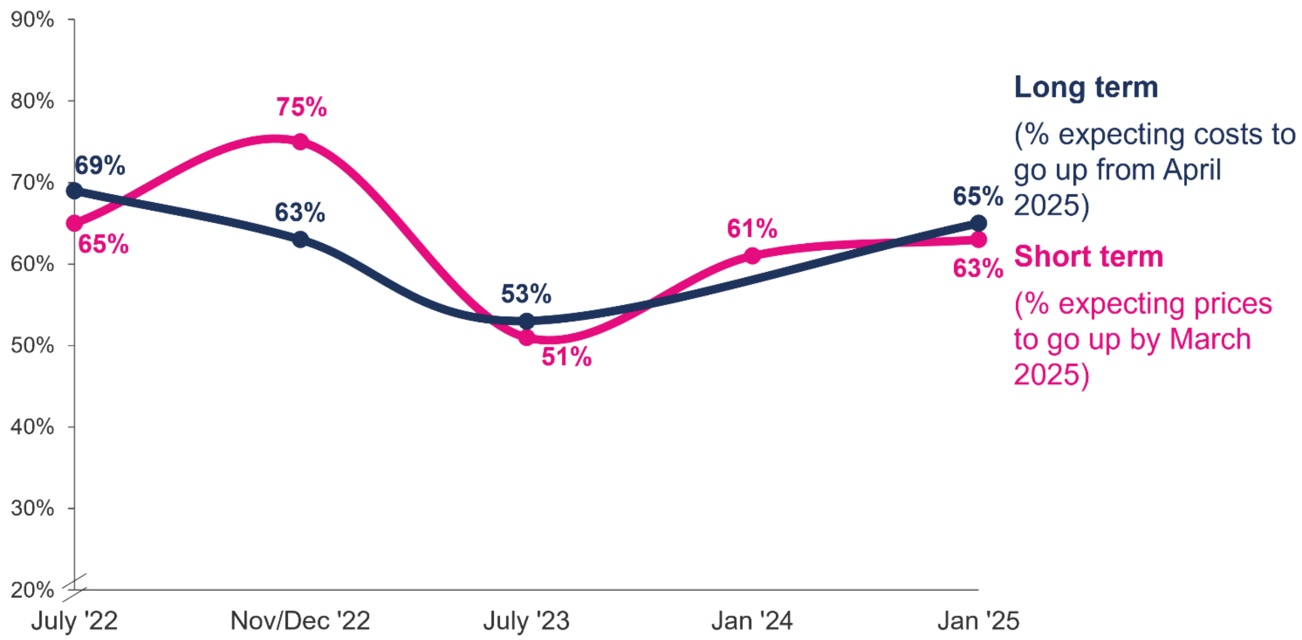
Respondents were asked if they expected their household energy costs to go up or down in the short term (within a few months of the completing the survey) or in the long term (after a few months following the survey). Overall, respondents expected their energy costs to go up in the future - 65% thought their costs would go up in the long term, while 63% thought they would increase in the short term.

In late February 2025, Ofgem announced that the energy price cap would rise by 6.4% effective from 1st April 2025, with the announcement made a couple of weeks following the completion of fieldwork.[12] With this in mind, respondents turned out to be correct in their assumptions that energy costs would go up. They were also correct about long-term rises according to the projections available at the time. However, in the intervening period these long-term projections have since been revised down.[13]

When looking at historic data in this respect, consumers have tended to think that their energy prices will go up more so than go down, perhaps reflecting the frequency of changes in energy costs since 2022 and that prices have remained above pre-crisis levels.

[12] Energy price cap will rise by 6.4% from April | Ofgem. Note that this announcement was made after the completion of fieldwork.
[13] Changes to energy price cap between 1 July and 30 September 2025 | Ofgem, published on 23 May 2025.

Figure 11: Expectations of changes in household energy costs[14]



E10. Looking forward, what do you think will happen to your households' energy costs across the following time periods?
Base: All respondents: July '22 (W2) 3,560 / Dec '22 (W3) 3,457 / July '23 (W4) 3,434 / Jan '24 (W5) 3,439 / Jan '25 (W6) 3,458

Consumers with the highest financially vulnerable situation were more likely to expect that prices would rise in both the short term (71%) and long term (70%), meaning those more likely to be negatively impacted by any price rises are the most concerned about them.

Other groups of consumers more likely to think that their energy prices will go up in the future included those who don't trust their energy supplier to charge a fair price (73% expect prices to rise in the short term; 74% expect prices to rise in the long term) and those in the lowest energy literacy quartile (68% expect prices to rise in the short term; 71% expect prices to rise in the long term).

[14] Note that the length and seasons covered by time frames vary in each wave due to changing fieldwork timings.

Sources of Support: Are consumers aware of sources of support?

Overview of findings

- **Overall, more consumers are reaching out to their suppliers for information, advice or support with paying their energy bills:** consumers overall were more likely to say they are reaching out to their suppliers for information, advice or support with paying their energy than they were last year (from 27% in January 2024 to 34% in January/February 2025).
- **This increase is being driven by those who are not currently experiencing impacts of affordability issues:** The overall rise in contacting their suppliers for information, advice or support has been driven by a rise amongst those who are not currently experiencing affordability issues (rising from 11% in January 2024 to 14% in January/February 2025).
- **Increasing supplier awareness of affordability issues:** among consumers with affordability issues, consumers said that their suppliers were more likely to be aware of these issues compared to last year. There have been increases in both the number who said they contacted their supplier about this, and that their supplier contacted them.
- **Debt/advice charities were the most common source of information, advice or support:** historically, friends and families were the most common source of support for paying their bills. However, debt/advice charities have now replaced them, following a 5% point increase from last year.

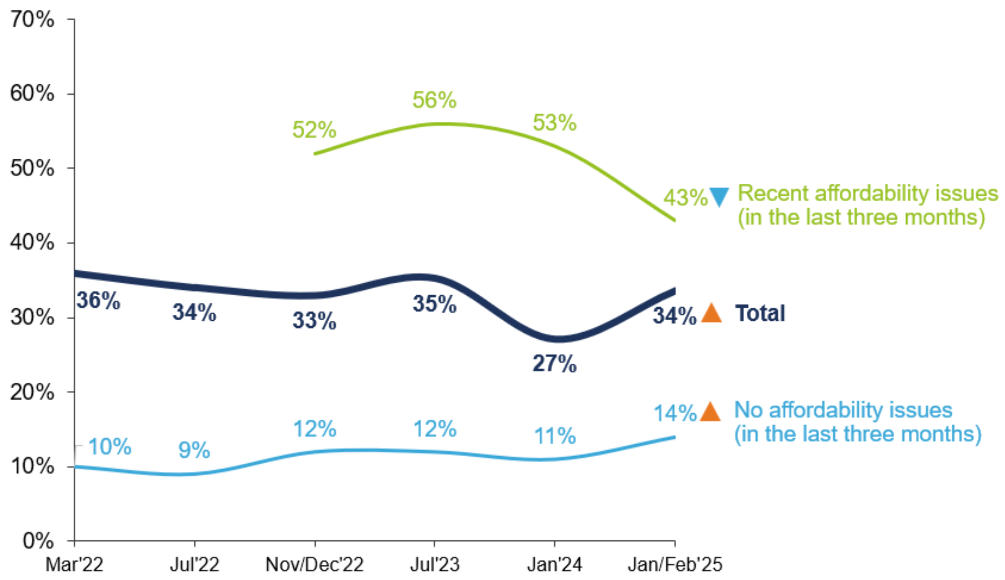
Seeking support for paying energy bills

Overall, one in three (34%) reported contacting someone for information, advice or support with paying their energy bills within the 3 months prior to completing the survey. This is back in line with historic figures recorded before a dip in January 2024 (27%).

The rise in contacting someone for information, advice or support is being driven by those who are not currently experiencing impacts of affordability issues or have not done so in the past three months (rising from 11% in January 2024 to 14% in January/February 2025). Meanwhile, of those who reported recent impacts of affordability issues in the past three months, fewer say they have contacted someone for information, advice or support with paying their energy bills compared to those who said they had last year (from 53% in January 2024 to 43% in January/February 2025).

This shift shows that the overall rise in reported contact for support is being driven more by those who are not currently experiencing impacts of affordability issues (or in the three months prior to completing the survey).

Figure 12: Contacted anyone/organisation for information, advice or support with paying energy bills in past 3 months by affordability status



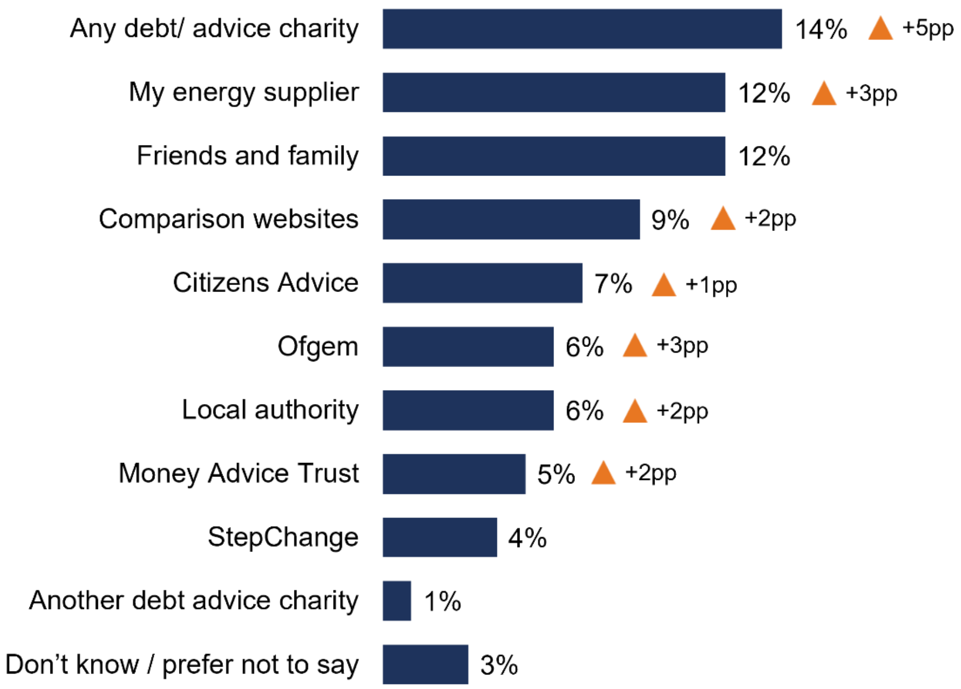
E5. Have you contacted any of the following for information, advice or support with paying your energy bills in the past 3 months?
Base: All respondents: Mar ‘22 (W1) 3,479 / July ‘22 (W2) 3,560 / Dec ‘22 (W3) 3,457 / July ‘23 (W4) 3,434 / Jan ‘24 (W5) 3,439 / Jan/Feb ‘25 (W6) 3,458

As shown in the figure below, consumers reported that they have contacted a range of sources for advice or support in paying their energy bills in the 3 months prior to completing the survey, with many of these sources seeing increases compared to January 2024.

Debt/advice charities were the most common source of information, advice or support with paying energy bills in the three months prior to the survey (14%, an increase on 9% in January 2024), replacing friends and family as the most common source (mentioned by 12% of consumers in January/February 2025).

There has also been an increase (from 9% to 12%) in the proportion who reported contacting their energy supplier for support, such that this now matches the highest level reported in July 2023.

Figure 13: Sources of information, advice or support with paying energy bills in past 3 months



E5. Have you contacted any of the following for information, advice or support with paying your energy bills in the past 3 months?
Base: All respondents: Jan/Feb ‘25 (W6) 3,458

Those with the highest level of financial vulnerability according to the Financial Vulnerability Classification were more likely to have contacted a debt or advice charity (20%), their energy supplier (17%) and friends and family (17%) compared to the average. Whereas those classified as doing well financially were more likely to contact Ofgem (7%).

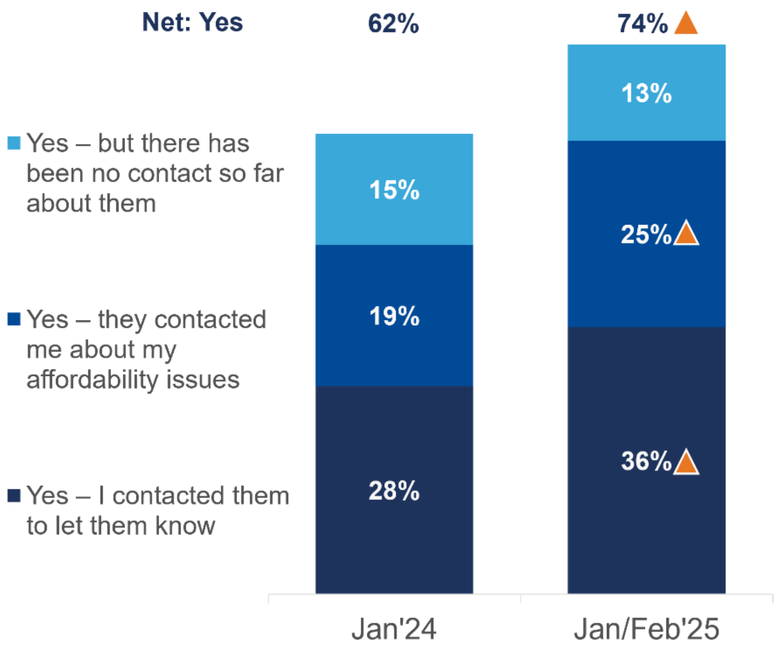
Supplier awareness of affordability issues

Among the 30% of consumers with recent affordability issues, three quarters (74%) said they thought that their supplier was aware of these issues, an increase on the 62% who did so in January 2024.

This has been driven by an increase in those who reported that their supplier contacted them (from 19% to 25%), as well as an increase in those who reported contacting their supplier (from 28% to 36%).

Although both metrics have increased since January 2024, a greater proportion of consumers-initiated contact with their supplier rather than their supplier contacting them. Though this difference could be due to respondent recall (i.e., respondents were more likely to remember them making the contact rather than having received contact), it points to a degree of proactivity to initiate conversations about affordability with their supplier.

Figure 14: Supplier awareness of affordability issues among those with recent affordability issues



E26: You said you had experienced an issue with affordability of energy bills. Do you think your supplier is aware of these affordability issues?
Base: All with recent affordability issues Jan ‘24 (W5) 806 / Jan/Feb ‘25 (W6) 1,039

This trend was also reflected in the latest Ofgem Energy Consumer Satisfaction (ESAT) survey data. In January 2025, 69% of those who had fallen behind on their bills had been in contact with their supplier about help in paying their bills, an increase on the 60% recorded in January/February 24.[15]

The ESAT data also found that close to nine in ten (87%) of those who contacted or were contacted by their supplier were offered support, either to discuss repayment (55%) or in terms of financial support (27%). Among those who were in contact with their supplier, 72% were satisfied with the support offered, while 10% were dissatisfied, a reduction on the 18% who were dissatisfied in this respect in July 2024.

[15] The latest Ofgem's Energy Consumer Satisfaction Survey (January 2025) report can be found here (published 13 May 2025).

Attitudes to payment methods: How do consumers understand the different payment methods?

Overview of findings

- **Prepayment meter and standard credit consumers less likely to say their payment method was an active choice:** two thirds of direct debit consumers said they actively chose to pay via direct debit, compared to just 38% for prepayment meter and 49% for standard credit consumers. However, prepayment meter and standard credit consumers valued the control it gives them over their usage and spend.
- **Standard credit consumers have become more open to changing how they pay, but for many it would cause difficulties:** after a dip in January 2024, openness to change among standard credit users has returned to earlier levels, again ahead of direct debit and prepayment consumers. However, one quarter of standard credit consumers said that if their supplier required them to change payment method, it would be a big inconvenience or cause significant difficulties.

Reasons for using payment method

As shown in the figure overleaf, prepayment and standard credit users were less likely to say their payment method was something they actively chose (48% and 59%, respectively) compared to two thirds (67%) of direct debit consumers. Direct debit consumers were more likely to cite the convenience of paying that way (31%) and that they have always paid via direct debit (22%).

Prepayment meter and standard credit consumers put greater emphasis on control (25% for prepayment meter, 26% for standard credit) and that their payment method helps them better understand their energy consumption (15% for prepayment meter, 17% for standard credit).

Although direct comparisons to previous waves is not possible due to a methodological change in this question for January/February 2025[16], historically it has been the case that prepayment meter and standard credit consumers have valued the control and the ability to understand their energy consumption more so than direct debit consumers.

Across all payment methods, those with higher numeracy favoured convenience (35%) and price (15%) while those with lower numeracy favoured control (20%).[17]

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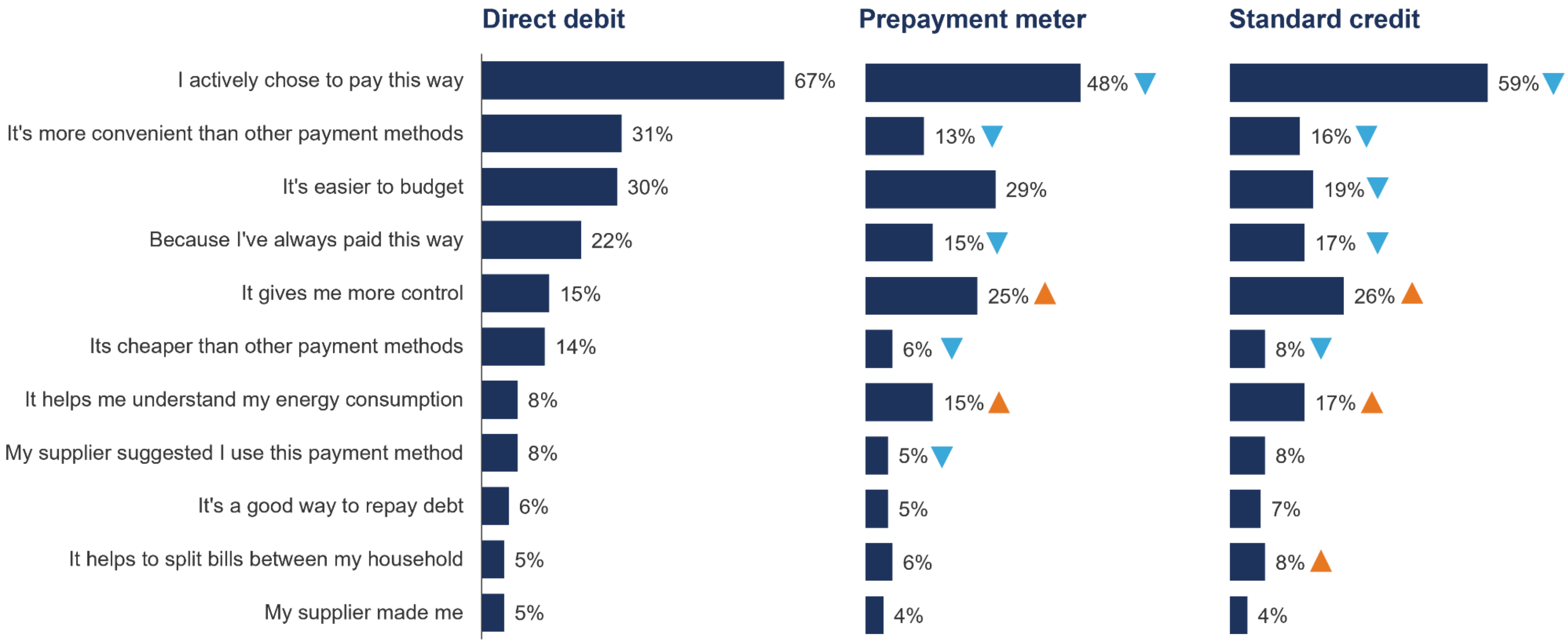
[16] Note that direct comparisons with previous waves is not possible due to the fixing of ‘I actively chose to pay this way’ to the top of options when completing the survey in January/February 2025, rather than randomising all options in the list as per previous waves.
[17] Analysis by numeracy was a new addition to the January 2025 wave. How numeracy is calculated can be found in the Appendix.

Figure 15: Reasons given for using payment type by payment types



A15. Why do you use the payment method you use? Codes for direct debit under 5% not shown.
Base: Direct debit (2,483); standard credit (438); prepayment meter (491). Statistical significance tested against direct debit at 95% confidence level.

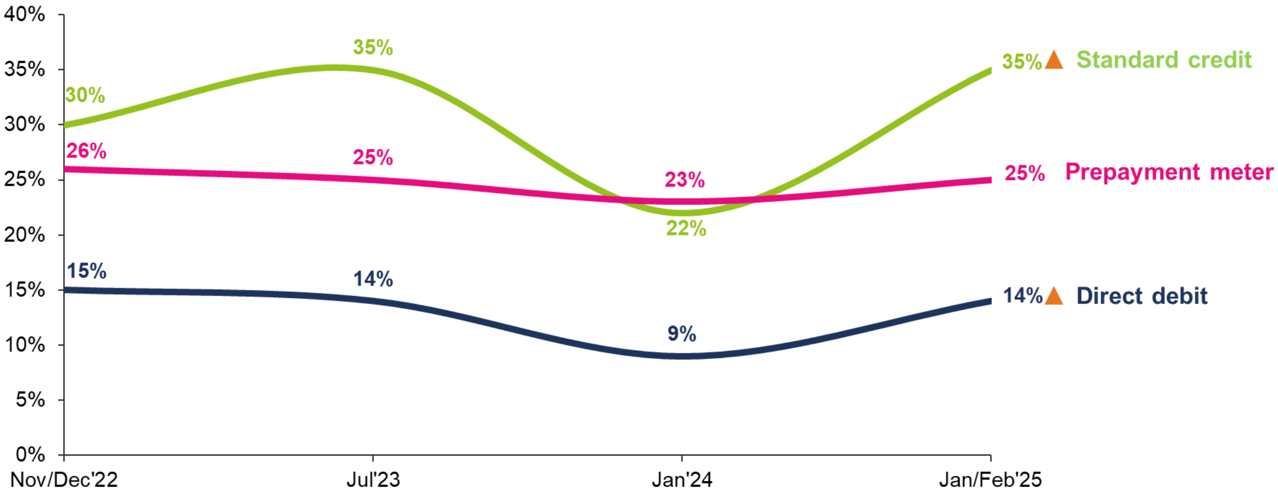
Desire to change payment method

Standard credit and prepayment meter users had a greater appetite to change payment method if they could (35% and 25%, respectively) compared to those who pay via direct debit (14%). Standard credit users recorded the largest increase in desire to change payment method compared to January 2024 (from 22%), while direct debit also recorded an increase (from 9%).

Although standard credit consumers appear to have the greatest appetite for changing their payment method, this differs considerably when considering the reasons to why they pay via standard credit. Those who said they pay via standard credit for positive reasons were more likely to not want to change the way they pay (68% vs. 63% for all standard credit consumers), whereas 74% of those who said they pay via standard credit for negative reasons said they would like to change their payment method (vs. 35% for all standard credit consumers).

Examples of positive reasons for why they use their current payment method include 'it's cheaper than other methods' and 'I actively chose to pay this way'. For negative reasons, examples include 'my supplier made me' and 'I don't know how to change it'.

Figure 16: Would want to change payment method, if possible, by current payment method



A16: If you could change your payment method for your energy, would you want to do so?
Base: Direct debit (2,483); standard credit (438); prepayment meter (491)

Impact on standard credit consumers if supplier required change to other payment method

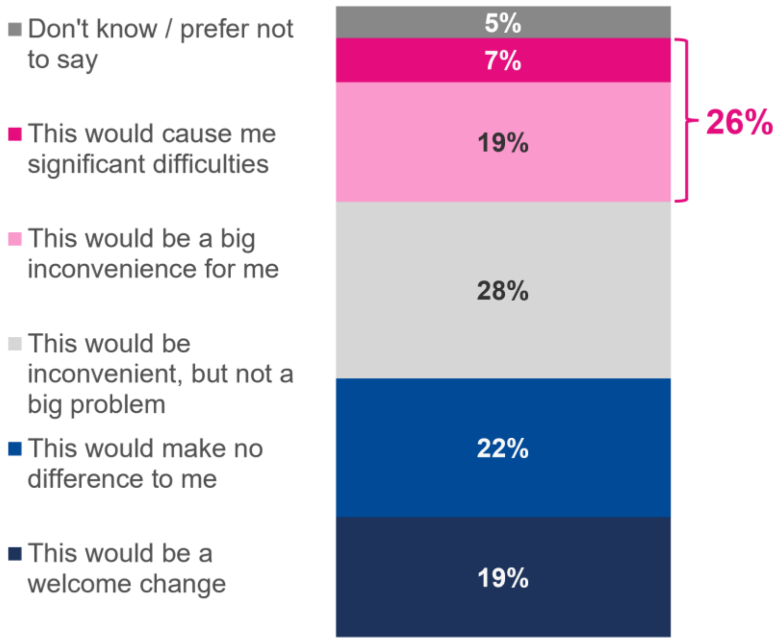
When standard credit consumers were asked what the impact would be if their energy supplier required them to change their payment method from paying on receipt of a bill or invoice to their choice of either direct debit or prepayment meter, one in five (19%) said this would be a welcome change, and a further one in five (22%) that it would make no difference.

However, a quarter of standard credit users (26%, equal to 3% of all consumers) said it would either be a big inconvenience (19%) or would cause significant difficulties (7%), while 28% said it would be inconvenient but not a big problem. Standard credit consumers with greater financial vulnerability were more likely to say that a change in their payment method would cause them significant difficulties (14%).

Other groups that said that changing their payment from standard credit to another method would cause them significant difficulties or be a big inconvenience include older respondents aged 65+ (49%) and homeowners (30%).

Additionally, those who said they pay by standard credit for positive reasons, described in the previous section, were more likely to say changing payment method would be a big inconvenience/ cause them significant difficulties (28%) and less likely to want to change payment method (17% vs. 25%).

Figure 17: Impact if energy supplier required change from standard credit to other payment method

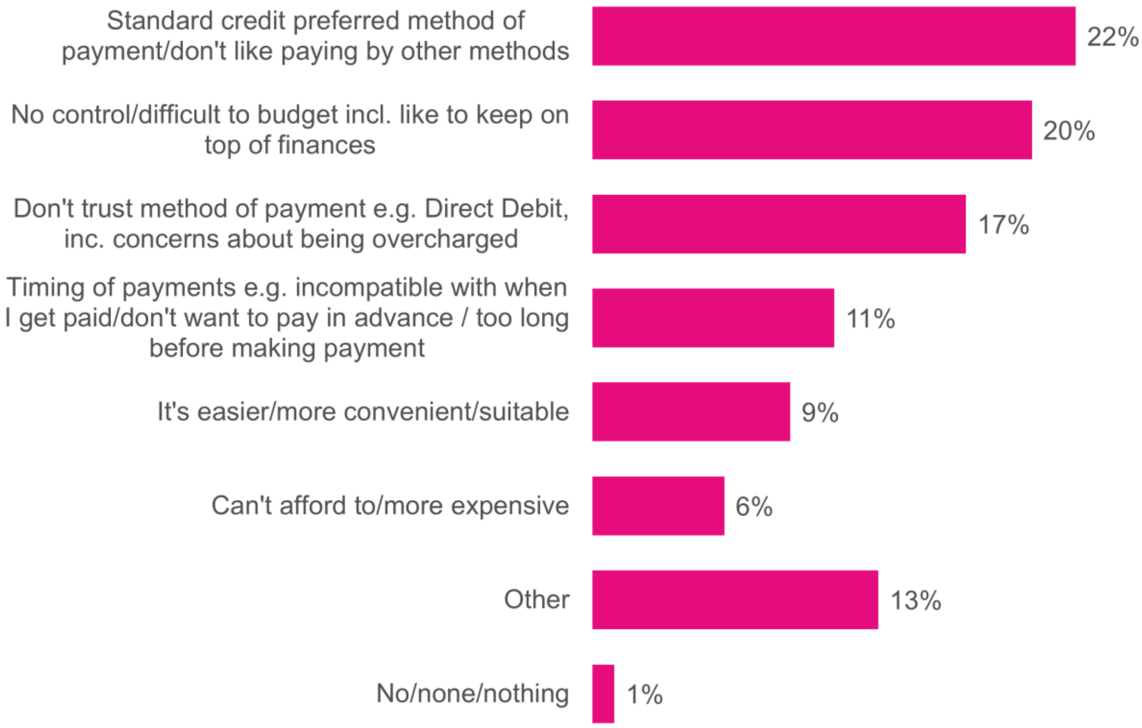


A16B: If your energy supplier required you to change your energy payment method from paying on receipt of a bill or invoice to your choice of either direct debit or prepayment meter, what sort of an impact would this have on you?

Base: Standard credit consumers (438)

Among the 26% of standard credit consumers who said it would be a big inconvenience or would cause significant difficulties for them to change their payment method, the primary reasons for this were a preference for paying by standard credit (22%), that it might give them less control/difficult to budget (20%) and that they do not trust other payment methods (17%).

Figure 18: Coded open responses to why it would be a big inconvenience or cause significant difficulties if energy supplier required change from standard credit to other payment method



A16c: Why would being required to change from paying on receipt of a bill or invoice cause a big inconvenience/significant difficulties? Open responses coded into relevant categories. Base: Standard credit consumers who would be caused a big inconvenience/significant difficulties (114)

Energy tariffs and pricing: Do consumers understand tariffs and pricing in the energy market?

Overview of findings

- **Higher (self-reported) energy literacy is linked to greater trust and engagement:** analysis by energy literacy quartiles revealed stark differences, with those in the most energy-literate group far more likely to engage with the market, trust suppliers and the sector, and less likely to face financial difficulties. In contrast, those with the lowest energy literacy tend to find themselves in more financually vulnerable situations, behind on bills, and less engaged.
- **There remains a high degree of overclaim for fixed tariffs:** while official figures show that 27% of total consumers are on fixed tariffs[18], over three in five respondents of the survey reported this was the case, a pattern we have consistently seen in all prior waves of the survey.
- **The majority of consumers know they pay a standing charge:** 7 in 10 (71%) said they were aware that they pay a standing charge, however most were unsure or incorrect about the amount paid.
- **Consumers are not willing to pay more to reduce frequency of price cap changes:** there was a reluctance among 7 in 10 (71%) to accept any increase in their energy bill cost if the price cap changed less frequently.

Consumer knowledge of energy (energy literacy) levels

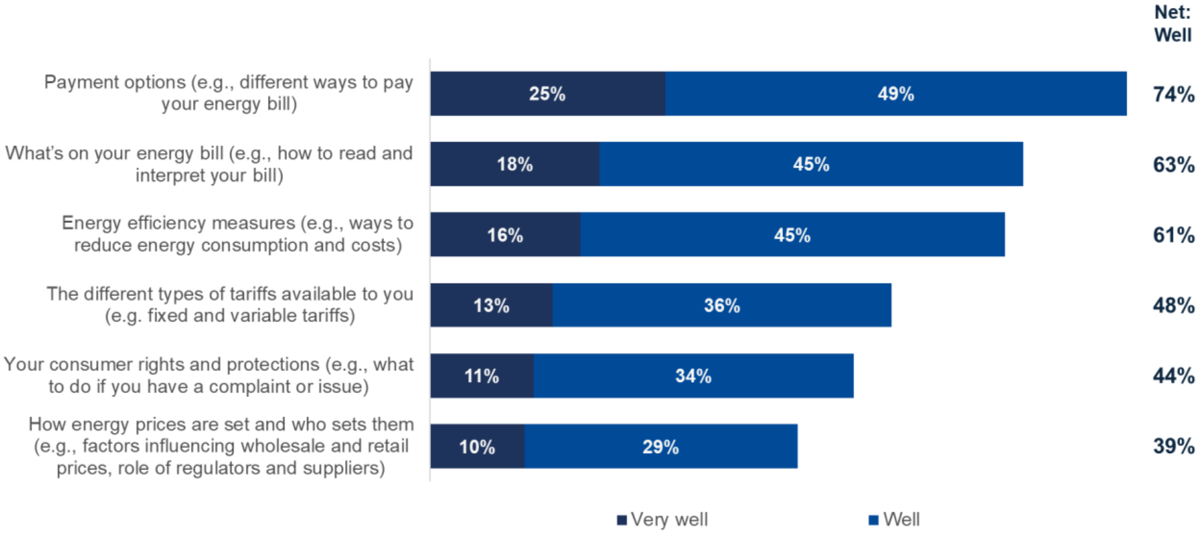
Consumer understanding of energy literacy statements

New for the survey in January 2025, respondents were asked how well or poorly they understood a number of statements regarding energy literacy. As shown in the figure below, understanding was rated highest in relation to payment options (74%), what is on the energy bill (63%) and energy efficiency measures (61%).

Less than half (48%) felt they understood the different types of tariffs available to them, 44% understood their consumer rights and protections, and 39% understood how energy prices are set and who sets them.

[18] Official figures found in the latest Ofgem State of the market report, published in April 2025.

Figure 19: Understanding of energy literacy statements



A20B: Generally, how well or poorly do you feel you understand the following?

Base: All respondents (3,458)

Energy literacy quartiles

To explore the issue of energy literacy further and to understand what the impact of energy literacy might be on engagement, we undertook analysis to identify energy literacy quartiles, which split respondents into four groups, including a 'high' energy literacy quartile – those with the highest understanding – and a 'low' energy literacy quartile – those with the lowest understanding. The full breakdown of how we calculated these quartiles can be found in the appendix.

Throughout this report, we refer to the differences between both highest and lowest quartiles. See below for a profile of each quartile.

High energy literacy quartile:

Who are they?

- More likely to be older (65+) and more affluent consumers – for example, they are more likely to be homeowners (67%), have no difficulties with their energy bills (55%) and classified as doing well (55%) in the Financial Vulnerability Classification.
- They are also more likely to be paying via direct debit (78%), have a smart meter and report being on a fixed tariff (72%).
- The highest energy quartile also typically has higher numeracy (29%).

How do they feel about and engage in the energy market?

- Overall, they have engaged in the energy market in the past 6 months, including comparing tariffs (34%) or switching tariff with the same supplier (21%). They are also more likely to engage in the near future.
- They have greater confidence in comparing energy prices (88%), with this confidence also reflected in their understanding of the energy literacy statements.
- The high energy literacy quartile is also more satisfied and trusting of suppliers - 82% trust their energy supplier to treat them fairly and 74% trust they will charge them a fair price. 88% are satisfied with their energy supplier.

Lowest energy literacy quartile:

Who are they?

- Those in the lowest energy literacy quartile are more likely to be less affluent consumers – more likely to be renters (47%), either constantly struggling or behind on their energy bills (58% struggling, 10% behind). They are more likely to be in the vulnerable (26%) or highly vulnerable (26%) groups as per the Financial Vulnerability Classification.
- They are more likely to pay for their energy via a prepayment meter (15%) and are more likely to be on a variable tariff (48%).

How do they feel about and engage in the energy market?

- The opposite of the high quartile, the lowest quartile are less likely to have engaged in the energy market - for example, they are more likely to have not engaged in any type of switching in the past 5 years (39%).
- They are also not likely to engage in the next three months – not likely to compare (37%) and not likely to switch tariff (22%).
- The lowest energy literacy quartile is more likely to think their energy costs will increase in both the long and short term (short term increase 68%; long term increase 71%).
- In a direct inverse of the high quartile, those in the lowest are more likely to be dissatisfied with their supplier (20%) and distrust their supplier (distrust to treat them fairly, 28% and distrust to charge a fair price, 46%).

How self-reported energy literacy compares to genuine energy literacy

Here, energy literacy is self-reported, therefore it often reflects confidence as much as knowledge. This likely explains why recently engaged consumers tend to report higher energy literacy—they're more familiar with the market and feel more able to navigate it.

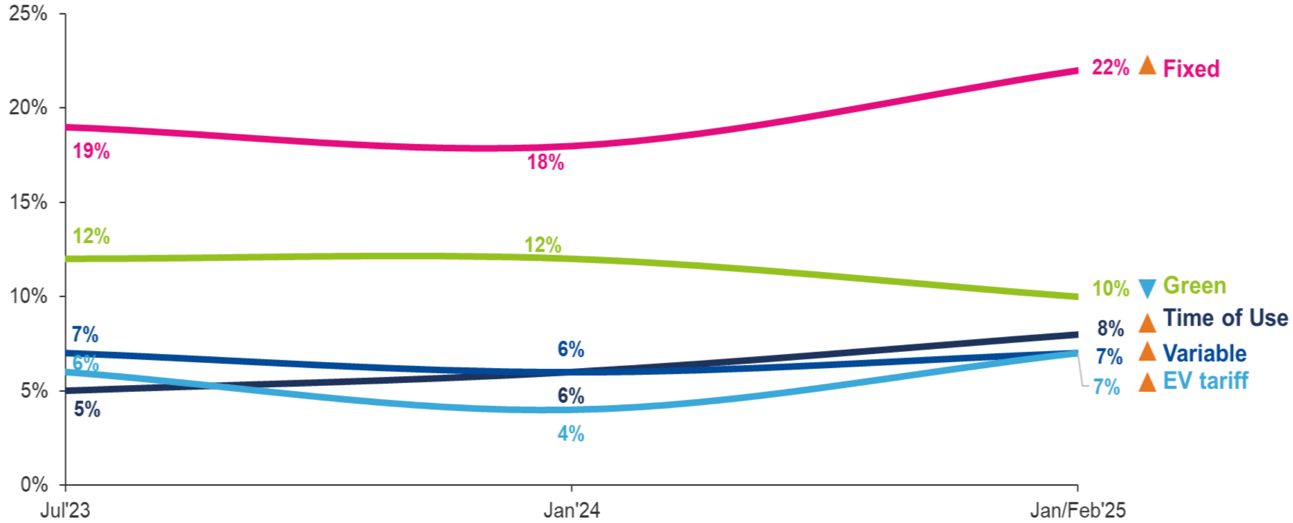
Additionally, this perceived confidence can explain why there is a relatively high level of self-reported energy literacy, whereas there are topics elsewhere in the survey which point towards a lack of understanding of how some elements of the energy market works. For example, 8% thought they do not pay a standing charge and 23% agreed that Ofgem is an energy supplier.

Motivations for switching to a new energy deal

Compared to January 2024, tariff types have become a greater consideration when switching to a new energy deal. Getting a fixed tariff remains the most likely option that would make consumers want to switch, with this increasing by 4 percentage points to 22% in January/February 2025. There were also increases in those who said getting a time of use, variable and electric vehicle (EV) tariff would make them want to switch compared to last year.

However, getting a cheaper tariff remains as the biggest motivator to switching to a new deal (55%). Motivations for switching are explored in greater detail in the final chapter.

Figure 20: Greatest motivators for switching to a new energy deal



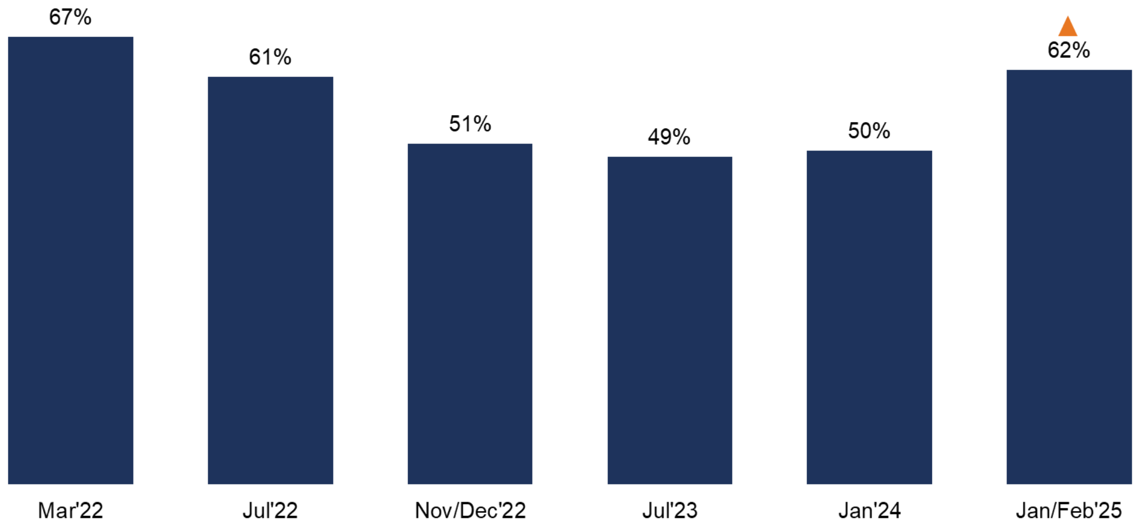
D13: Which, if any, of the following are most likely to make you want to switch to a new energy deal at the moment?
Base: All respondents (3,458)

Fixed tariffs

Three in five (62%) reported being on a fixed tariff, an increase on the 50% who reported this in January 2024, but not matching the peak of 67% in March 2022. As we've reported in previous surveys, there continues to be an overclaim for those on fixed tariffs, with official figures reporting that 27% of electricity consumers are on a fixed tariff.[19]

Those in the highest energy literacy quartile were more likely to claim to be on a fixed tariff as compared to those in the lowest quartile (72% compared to 52%), but in light of the findings above, the extent to which this reflects reality is moot.

Figure 21: Self-reported rates on a fixed tariff



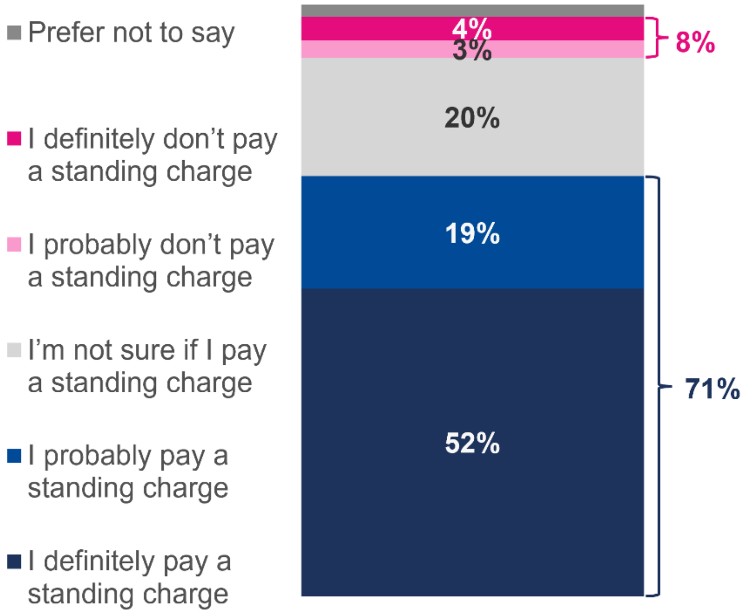
A13: Are you on a fixed term tariff for gas and electricity /gas/ electricity?
Base: All respondents: Mar '22 (W1) 3,479 / July '22 (W2) 3,560 / Dec '22 (W3) 3,457 / July '23 (W4) 3,434 / Jan '24 (W5) 3,439 / Jan/Feb '25 (W6) 3,458.

[19] Official figures found in the latest Ofgem State of the market report, published in April 2025.

Standing charges

New to the survey in 2025 were questions around standing charges. The majority (71%) were aware that they pay a standing charge, but there was a notable minority who said they were unsure (20%). Additionally, just under one in ten (8%) said they do not pay a standing charge.[20]

Figure 22: Reported rates of paying a standing charge



G2. Do you pay a standing charge on your energy bill?
Base: All respondents (3,451)

Those who believed they pay a standing charge were asked how much they thought their daily standing charge was.

Based on [Ofgem's report of lowest and highest standing charges for electricity and gas across the UK](), the parameters for 'correct' standing charge figures were set at the following:

Electricity	40 pence – 73 pence
Gas	30 pence – 32 pence

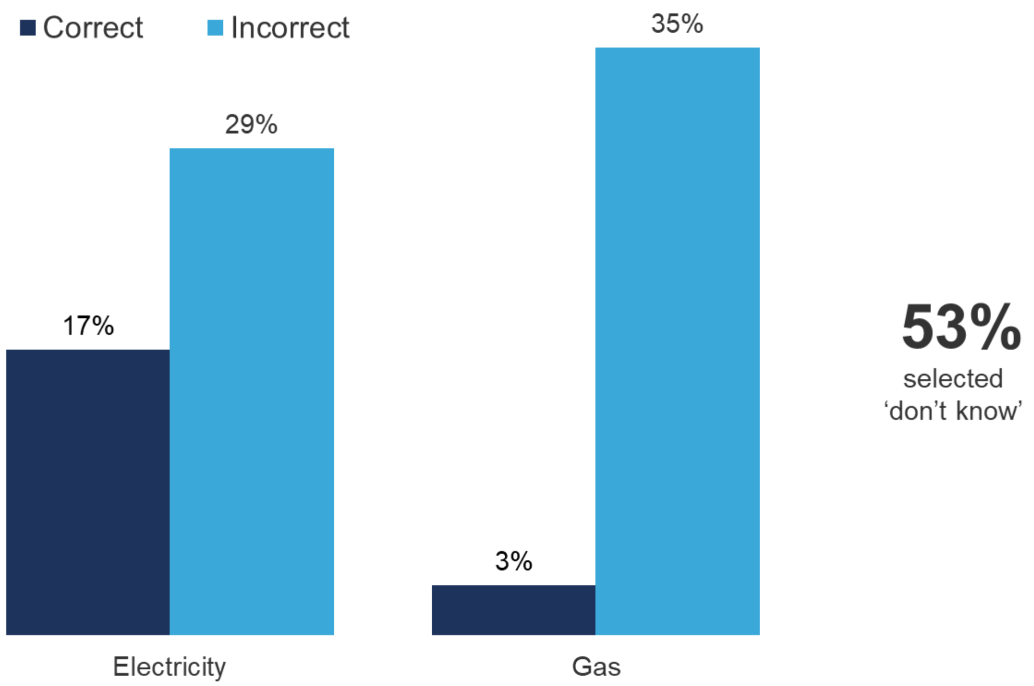
The findings highlight widespread uncertainty about energy costs. Over half of respondents (53%) said they did not know how much their standing charge was, and correct estimates were rare - just 17% for electricity and only 3% for gas. The broader price range for electricity (33p

[20] At the time of publication, only a small number of UK energy consumers could be on a tariff with no standing charge.

vs. 2p for gas) might help explain why electricity is slightly more recognisable, but overall, most consumers are unsure or unable to estimate costs accurately.

This is another example where there is a gap between self-reported energy literacy and genuine energy literacy. As reported earlier on, 63% of respondents claimed they had a good understanding of what's on their energy bill, yet 20% were unsure if they pay a standing charge, and a further 8% said they do not pay one. An even smaller number of respondents overall were able to correctly identify the amount of standing charge that they pay. As we've observed, respondents have greater confidence in their energy literacy when self-reporting, but there is a considerable knowledge gap when it comes to standing charges and the amount they are paying.

Figure 23: Estimates for standing charges for electricity and gas



G2a: Off the top of your head, how much is the daily standing charge for your <gas and electricity/electricity/gas>?
Base: Those who think they pay a standing charge (2,408)

Willingness to pay more for less frequent price changes

Respondents were asked a number of questions on the energy price cap and price stability. The energy price cap is a limit set by Ofgem on the maximum amount energy suppliers can charge consumers on a variable tariff, as well as the daily standing charge. Introduced in January 2019, the price cap aims to protect consumers from excessive charges and ensure prices reflect the actual cost of supplying energy. At the time of publication, the price cap is reviewed and updated every three months.

Consumers were asked if they would accept their household's energy bill increasing by an extra £10 or £20 or £40 a year if it meant that the price cap changed less frequently (every 6 months instead of every 3 months).[21] This question used a Gabor-Granger technique whereby respondents were taken up or down the scale depending on their answers. A full breakdown of how this was set up can be found in the appendix.

The majority were not prepared to see their energy bill increase even by a small amount over the year, as seven in ten (71%) said that they would not accept any increase, and a further 16% did not know. A handful of respondents said they would definitely accept a maximum increase of £10 (6%), a maximum increase of £20 (3%) and a maximum increase of £40 (4%).[22]

Figure 24: Acceptance of bill increase if price cap changed less frequently – those who 'definitely would accept'

[21] Note that this question (G9) was asked to those who claimed to be on a variable tariff (n=1410).

[22] For this exercise, we set the boundary of acceptance at those who said they would 'definitely accept' an increase, rather than including those who said they 'probably would' or 'might or might not accept'. This approach was agreed based on literature showing that survey respondents are often influenced by a hypothetical bias, whereby individuals overstate their willingness to pay when comparing hypothetical scenarios versus real life. Source: Valuation Techniques for Social Cost-Benefit Analysis (2011)

G9A-G9E. Would you accept your household's energy bill increasing by an extra [£10/£20/£40] a year if it meant that the price cap changed less frequently (every 6 months instead of every 3 months)?
Base: Those on a variable tariff (Set A: 709; Set B: 701)

Though the level of acceptance is minimal, there were some groups who would be more willing than others to accept an increase:

- Younger respondents aged 16-34.
- Those who trust their energy supplier to treat them fairly.
- Those who are confident in comparing energy prices.
- Those on a time of use tariff.

Consumers who claimed to be on a fixed tariff were also asked about price stability vs. frequency of price adjustments. However, due to the overclaim in our survey for those on fixed tariffs (as reported earlier on), results should be treated with caution.

The majority of consumers who claimed they were on a fixed tariff preferred price stability over frequent adjustments. When asked how often prices should change if they reflected the market, 75% said less often than the current quarterly updates. Only 3% supported monthly changes, while 35% favoured changes every two to five years.[23]

[23] Note that this question (D7A) was asked to those who claimed to be on a fixed tariff (n=2131) only, therefore it is unsurprising that there is a desire for less frequent price changes.

Sectoral trust: What are consumers' levels of trust in the energy market?

Overview of findings

- **Trust in the sector has improved:** trust that energy suppliers are fair in the way they deal with consumers and citizens has increased, though it still lags behind banks and internet providers. Energy suppliers have also drawn level with water companies this wave.
- **This is reflected in the latest energy satisfaction survey data, where supplier satisfaction has been increasing:** as reported in the January 2025 wave of the ESAT data, consumers have reported being increasingly satisfied with their energy supplier.

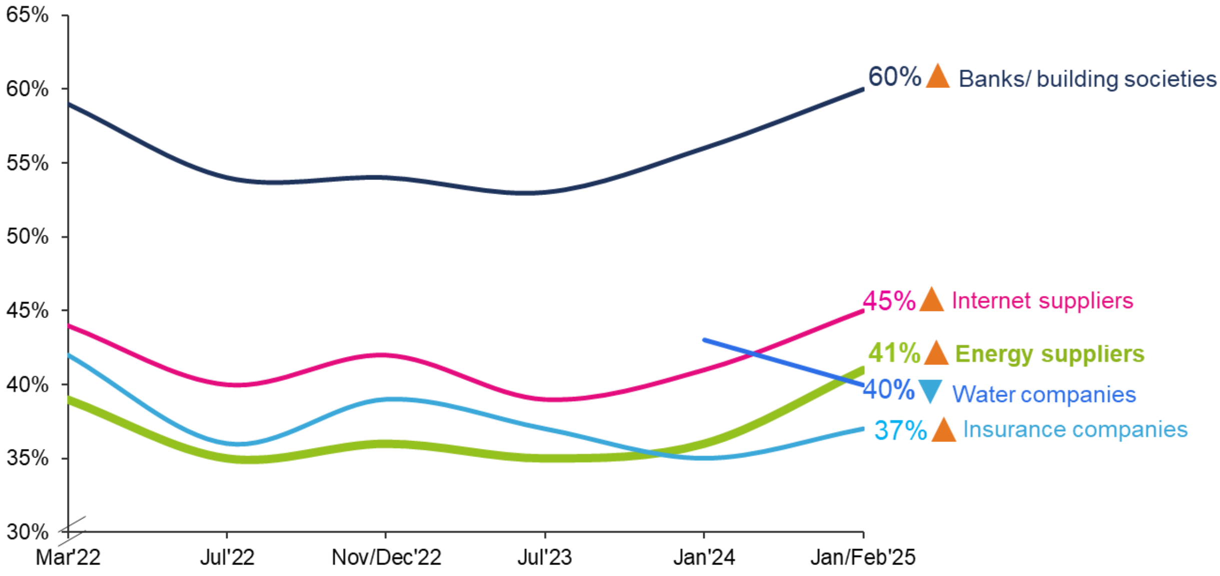
Trust in the energy sector

The proportion of consumers who said that they trust energy suppliers to be fair in the way they deal with consumers and citizens has improved from 36% in January 2024 to 41% in January/February 2025 – the highest recorded score so far in the survey for energy suppliers.

When benchmarking against other industries, banks and building societies remain the most trusted (60%), followed by internet and broadband suppliers (45%). However, energy suppliers have now drawn level with water companies with trust in water companies falling (40%) and remain ahead of insurance companies (37%).

As we have seen, fewer consumers are facing financial difficulties and more are able to pay their bills on time. This, coupled with increasing energy supplier satisfaction and increasing trust in suppliers, could be contributing to improved levels of trust in the market.

Figure 25: Trust in organisations to be fair in the way they deal with consumers and citizens over time



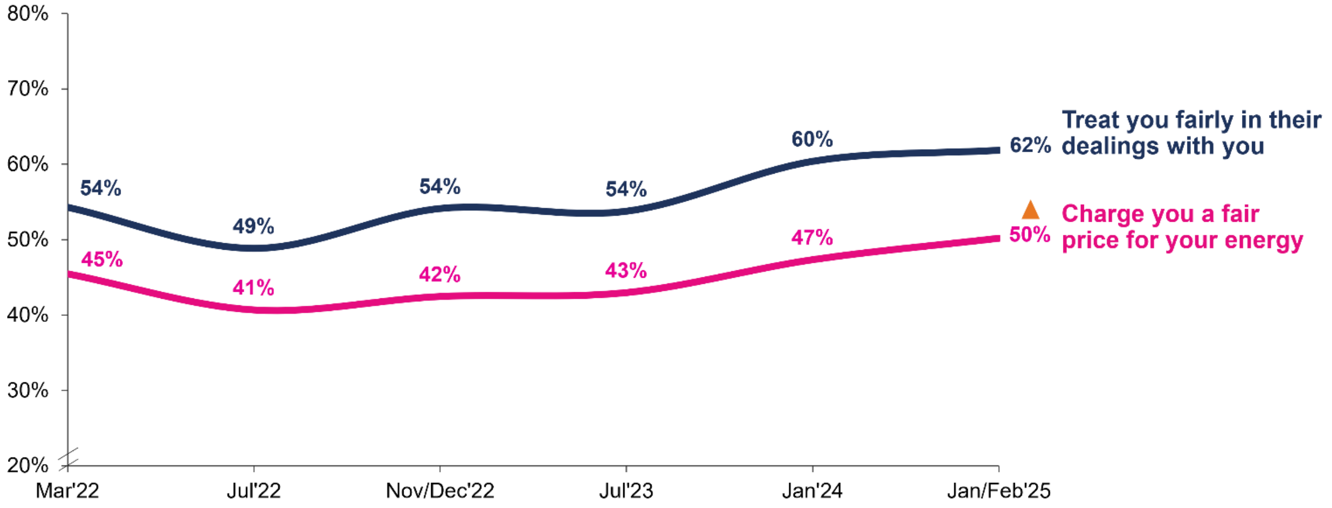
D2A. To what extent do you personally trust or distrust each of the following different organisations to be fair in the way they deal with consumers and citizens?
Base: All respondents: Mar ‘22 (W1) 3,479 / July ‘22 (W2) 3,560 / Dec ‘22 (W3) 3,457 / July ‘23 (W4) 3,434 / Jan ‘24 (W5) 3,439 / Jan/Feb ‘25 (W6) 3,458.
*Water companies introduced to this question in January 2024

Trust in energy suppliers

Alongside improvements in trust in the sector and supplier satisfaction, trust in their energy supplier to treat them fairly in their dealings with them, and to charge them a fair price for their energy, has continued to improve steadily since July 2022. Three in five (62%) said they trusted their supplier to treat them fairly, as compared to 49% in July 2022, and half (50%) that they trusted them to charge a fair price, as compared to 41% in July 2022.

Trust in energy suppliers is closely linked to energy literacy - trust in their supplier to treat them fairly is 42% among those in the lowest energy literacy quartile compared to 82% in the highest quartile. The same is true for trust in their supplier to charge a fair price. This was 27% among the lowest quartile and 74% among the highest quartile.

Figure 26: Trust in energy supplier over time[24]



D1. To what extent do you trust or distrust your energy supplier(s) to...?
Base: All respondents: Mar '22 (W1) 3,479 / July '22 (W2) 3,560 / Dec '22 (W3) 3,457 / July '23 (W4) 3,434 / Jan '24 (W5) 3,439 / Jan/Feb '25 (W6) 3,458.

24 Note that fieldwork for January/February 2025 was completed prior to announcements of future energy price rises.

Satisfaction with energy suppliers

As we've seen, trust in energy suppliers is increasing, a finding which is mirrored in the latest Ofgem Energy Consumer Satisfaction Survey (ESAT) data (latest report found here). As outlined in this report, consumer satisfaction with energy suppliers has risen in comparison to previous waves – satisfaction was reported at 81% in the latest wave of the survey (January 2025), an increase from 78% reported in July 2024.

Perceptions of Ofgem: What do consumers know about Ofgem's role and remit?

Overview of findings

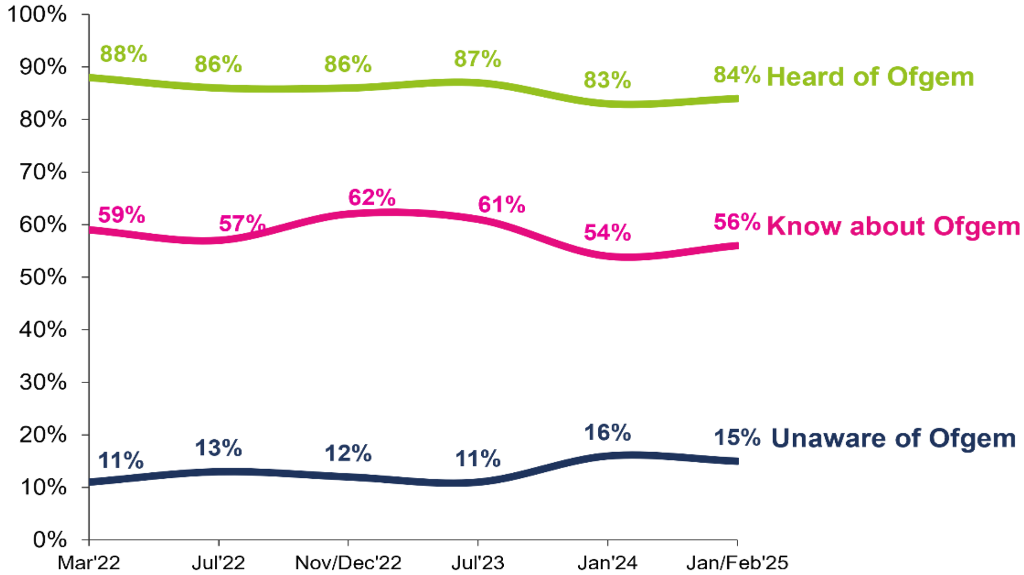
- **Awareness and knowledge of Ofgem has remained fairly stable:** the majority of consumers have heard of Ofgem (84%) and just over half said they know about Ofgem (56%) – both metrics remaining stable compared to last year.
- **Perceptions of Ofgem lean positive but there are some concerns:** 63% agreed that Ofgem is a trusted source of information and 62% agreed that Ofgem holds energy suppliers to account. However, agreement that Ofgem is to blame for rising bills has increased compared to last year (33% in January/February 2025 from 29% in January 2024).

Awareness of Ofgem

Awareness and knowledge of Ofgem has remained relatively stable, with over four in five (84%) having heard of Ofgem, and over half (56%) knowing about Ofgem.

Among the 56% who reported knowing about Ofgem, the proportion who incorrectly believed it is an energy supplier has increased from 14% in January 2024 to 23% in the latest wave. However, changes in this metric have been volatile in the past, as in July 2023 19% believed Ofgem to be an energy supplier.

Figure 27: Awareness of Ofgem



B1: Before today, had you heard of Ofgem, the independent energy regulator for Great Britain? Base: All respondents: Mar '22 (W1) 3,479 / July '22 (W2) 3,560 / Dec '22 (W3) 3,457 / July '23 (W4) 3,434 / Jan '24 (W5) 3,439 / Jan/Feb '25 (W6) 3,458.

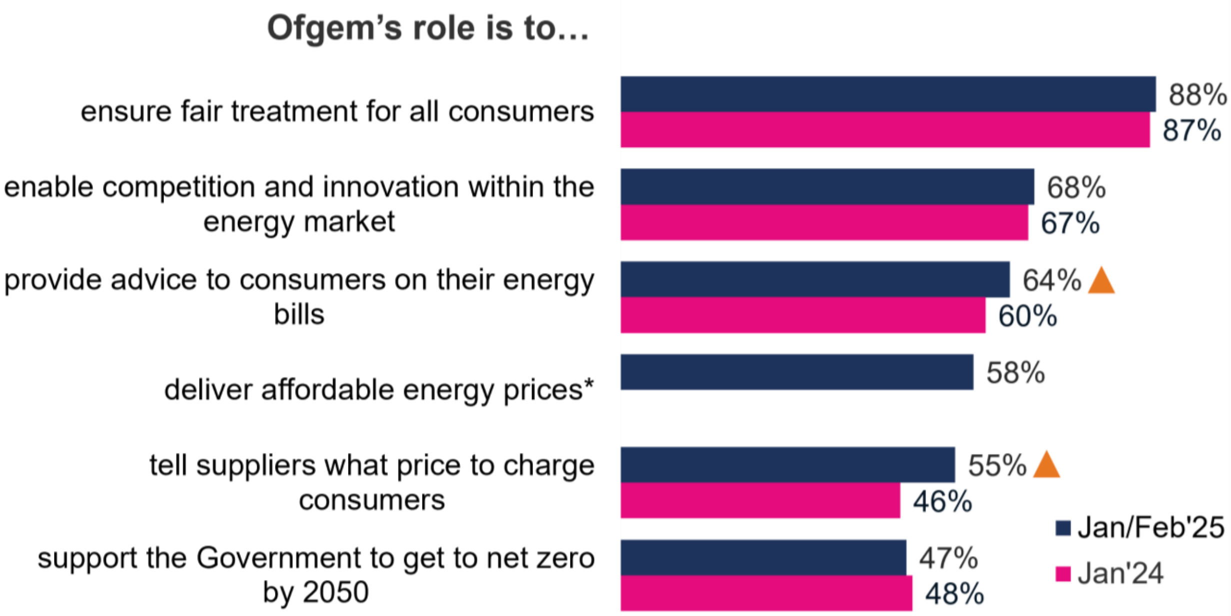
Understanding of Ofgem’s role and remit

Among the 56% who reported knowing at least a little about Ofgem, nine in ten (88%) believed its role is to ensure fair treatment for all consumers, two in three (68%) that its role is to enable competition in the energy market, and half (47%) that its role is to support the government to get to net zero by 2050, all in line with January 2024.

Two in three (64%) believed Ofgem’s role is to provide advice to consumers on their energy bills (which is a false answer), an increase on the 60% who did so in January 2024, and over half (55%) that it is to tell suppliers what price to charge consumers, again an increase on the 46% who did so in January 2024.[25]

New for this wave, 58% believed that Ofgem’s role is to deliver affordable energy prices.

Figure 28: Understanding of Ofgem’s role and remit



B1B. Do you think the following statements about Ofgem’s official role are true or false? Base: Those who know at least a little about Ofgem (1,884). *Ofgem’s role is to deliver affordable energy prices was a new statement for Jan/Feb’25

[25] While the question asked whether each statement reflects Ofgem’s official role, some respondents may have answered based on their perception of Ofgem’s performance, rather than whether the activity is formally part of its remit.

Perceptions of Ofgem

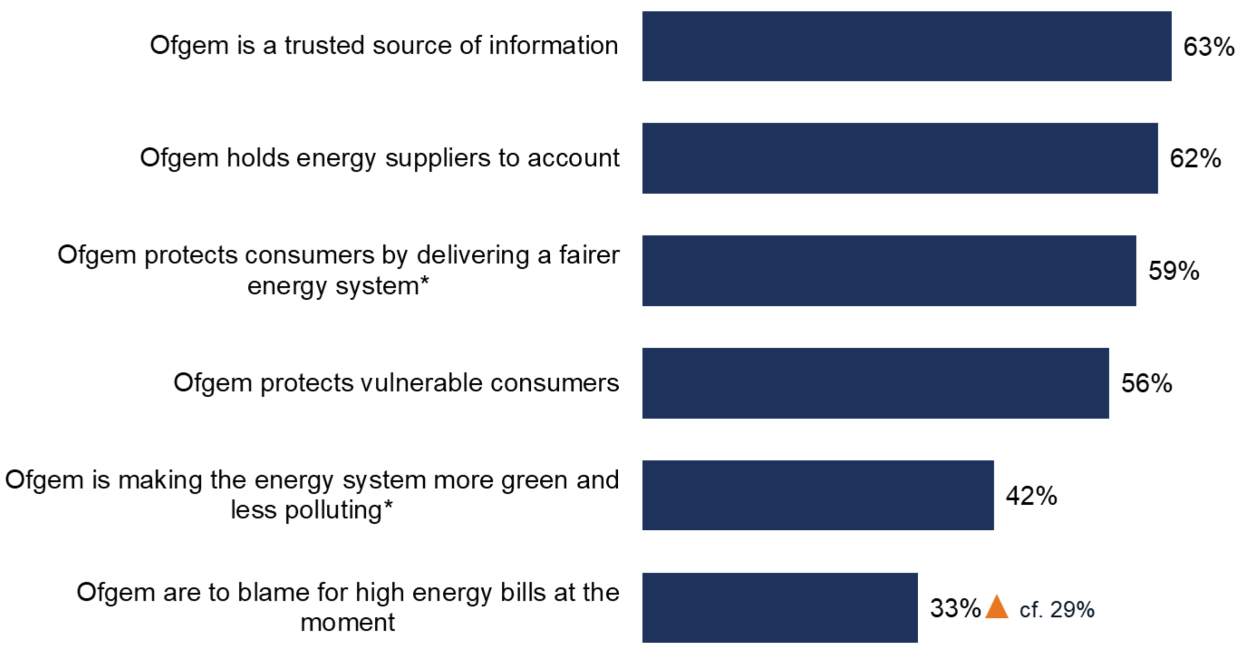
The 56% who reported knowing at least a little about Ofgem were asked to rate their agreement with a range of statements.

63% agreed that Ofgem is a trusted source of information and a similar proportion agreed that it holds energy suppliers to account (62%). Over half agreed that Ofgem protects consumers by delivering a fairer energy system (59%) and that it protects consumers in financially vulnerable situations (56%).

However, although lower in agreement compared to the other statements, agreement that Ofgem are to blame for high energy bills at the moment has increased from 29% in January 2024 to 33% in the latest wave. However, notably this metric has been volatile in past waves (35% in March 2022; 34% in July 2022; 29% in November/December 2022).

Similarly to trust in the energy market, there is a strong correlation between those with highest energy literacy and feeling more positive about Ofgem.

Figure 29: Agreement with statements about Ofgem[26]



B12. To what extent do you agree or disagree with the following statements about Ofgem? Base: Those who know at least a little about Ofgem and shown no information about Ofgem (1,199). *New statements introduced in Jan/Feb'25

[26] For the first time, the sample for this question was split so that one third were shown a short description of Ofgem before answering. The remainder did not see any information (in line with previous waves). For a full breakdown, see the Appendix. Note that no statistically significant differences were observed between those who did vs. did not see any information on Ofgem.

Energy market engagement: Levels of consumer engagement in the energy market

Overview of findings

- **Reported switching has returned to levels last seen in November/December 2022:** after a dip in July 2023 and January 2024, there was a greater proportion of consumers who said they have switched tariff with the same supplier. However, more than two in five consumers reported being with the same energy supplier for more than five years, or never having switched at all.
- **Most switchers and comparers said they looked for switching information directly from suppliers:** finding out information on comparing and switching deals is most commonly from their energy supplier, though a quarter reported using an automated scanning service. Reflecting this, one in five reported a lack of confidence in comparing prices, terms and features.
- **Consumers report price savings from engaging in the market:** those who have switched reported better experiences with their new supplier (e.g. a better price). This was echoed in that three in four of those who had switched (supplier or tariff) reported saving money as a result.
- **However, not all consumers are able to find a cheaper tariff:** among those who said they had compared, but did not end up switching, the top reason for not switching was due to not being able to find a cheaper tariff.

Market engagement in the last six months

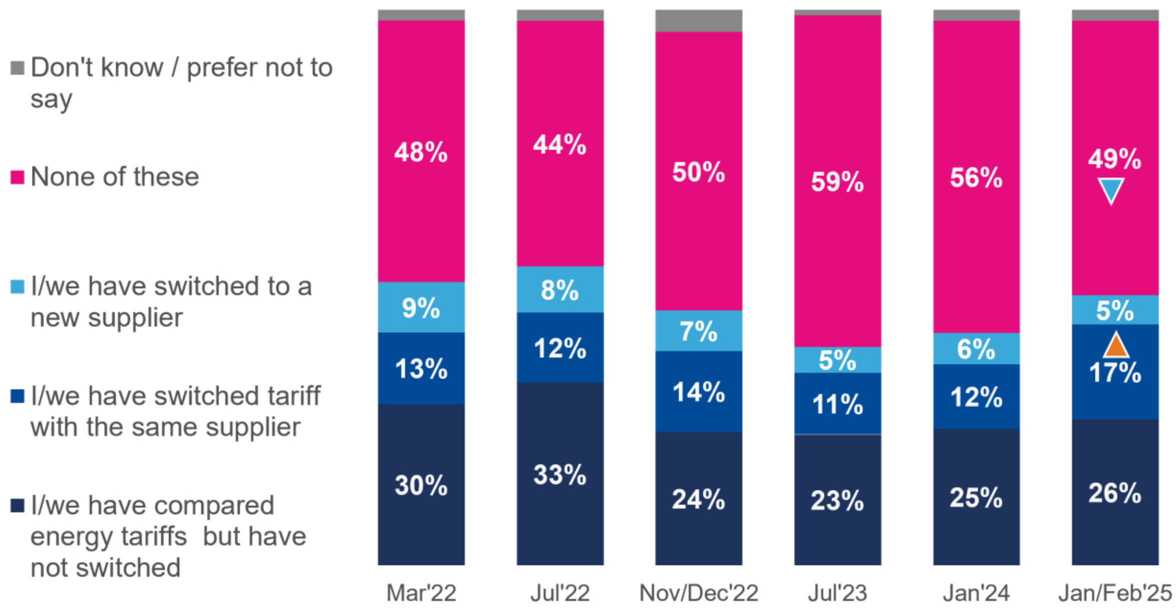
Overall comparing/actions taken in the last six months

Reported engagement in the energy market in the past 6 months has increased compared to levels recorded in January 2024. Overall, there are fewer who said they have not compared or switched in the past 6 months (from 56% in January 2024 to 49% in January/February 2025), while there was an increase in those who have switched tariff with the same supplier (from 12% in January 2024 to 17% in January/February 2025).

Notably, this wave recorded the highest proportion since tracking began of consumers who said they had switched tariff with the same supplier, whereas the proportion who switched supplier is at its joint lowest levels (5% also recorded in July 2023).

A further 5% said they have switched to a new supplier and 26% have compared energy tariffs but not switched - both metrics were in line with last wave.

Figure 30: Switching actions in the past six months



C4: Which, if any, of these have you or your household done in the past 6 months?
Base: All respondents: Mar '22 (W1) 3,479 / July '22 (W2) 3,560 / Dec '22 (W3) 3,457 / July '23 (W4) 3,434 / Jan '24 (W5) 3,439 / Jan/Feb '25 (W6) 3,458.

Sources of information when switching or comparing

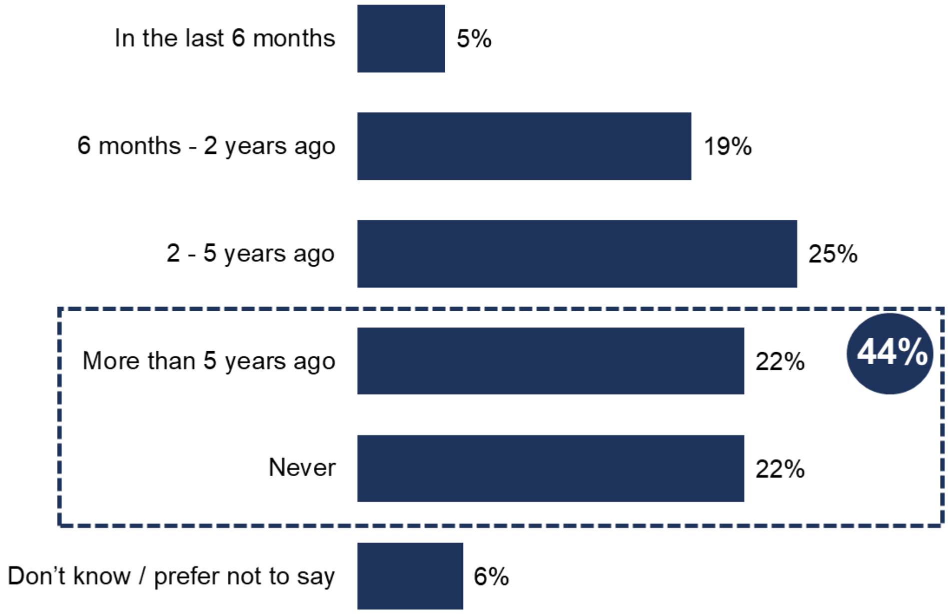
Among the 48% who reported switching or comparing in the last six months, two in five (43%) searched for the information they were looking for directly from their supplier, a quarter (26%) used a price comparison website, and the same proportion (25%) used a service that scans the energy market and contacts them if there is a better deal available.

Older respondents aged 65+ were more likely to say they found information directly from their supplier (52%), whereas younger respondents aged 16-34 were more likely to have used a scanning service (30%). There were no recorded differences by age group with regards to the use of price comparison websites.

Switching actions across time

One in five (22%) consumers reported being with the same supplier for at least five years, and the same proportion (22%) that they had never switched their supplier. When combining the two, almost half (44%) have not switched supplier in the past 5 years.

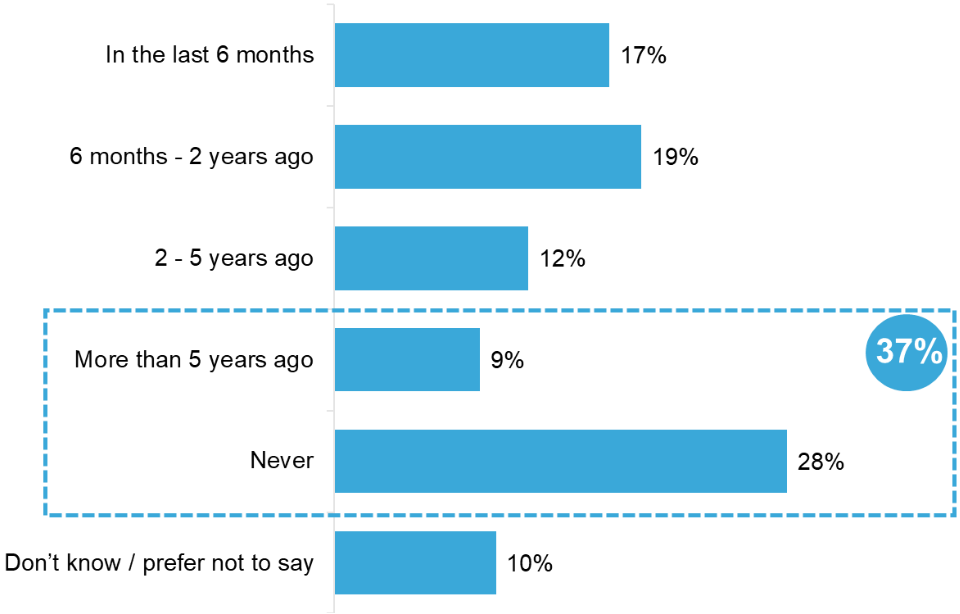
Figure 31: Switched supplier at any time



C4: Which, if any, of these have you or your household done in the past 6 months?
Base: All respondents (3,458) / C4B. Roughly, how long ago was it that you actively chose to do each of the following? Base: All who have not switched supplier in the past 6 months (3,273)

One in ten (9%) reported that they have stayed on the same tariff for at least five years, and a further 28% that they had never switched tariff with their existing supplier.

Figure 32: Switched tariff with same supplier at any time



C4: Which, if any, of these have you or your household done in the past 6 months?
Base: All respondents (3,458) / C4B. Roughly, how long ago was it that you actively chose to do each of the following? Base: All who have not switched supplier in the past 6 months (3,273)

When combining switching actions, three in ten (30%) had not switched either to a new supplier or to a new tariff with the same supplier at all in the past five years, with this proportion higher among the following groups:

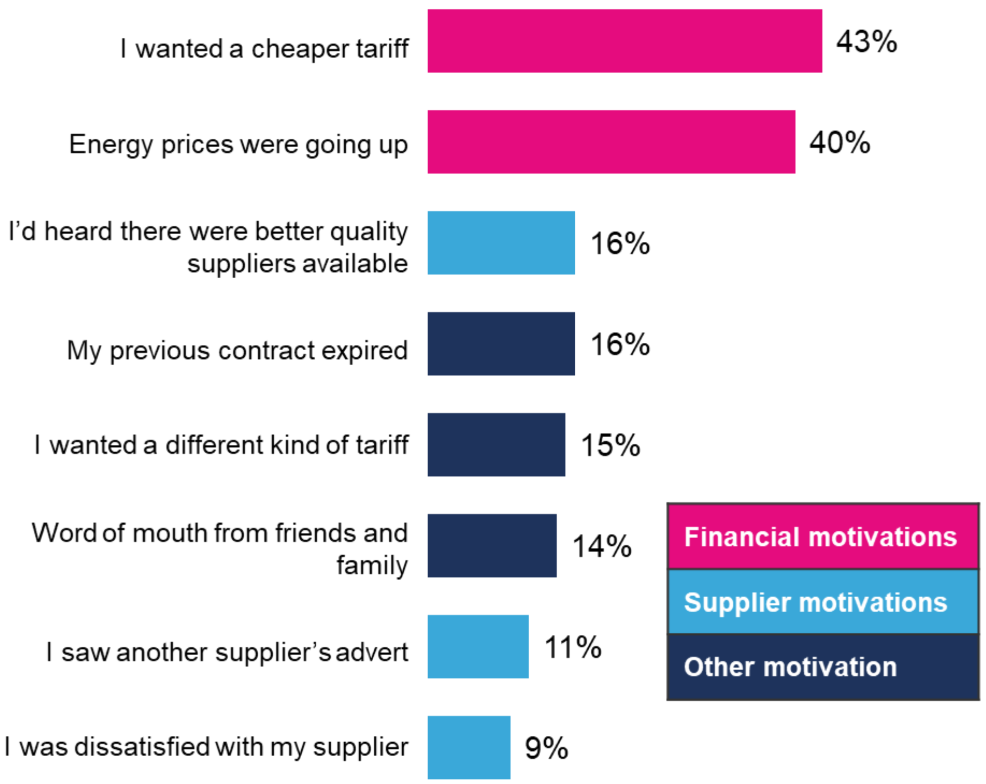
- those with low numeracy (34%).
- those in the lowest energy literacy quartile (39%).
- those classed in the financially vulnerable group (37%)
- prepayment meter customers (54%).
- those on a variable tariff (46%).

Reasons for recent engagement

Reasons for comparing

Respondents who have engaged in the market in the past six months were asked the reason why they decided to compare. The top two reasons were around financial motivations – 43% said they wanted to find a cheaper tariff and 40% said because energy prices were going up.

Figure 33: Reasons for comparing

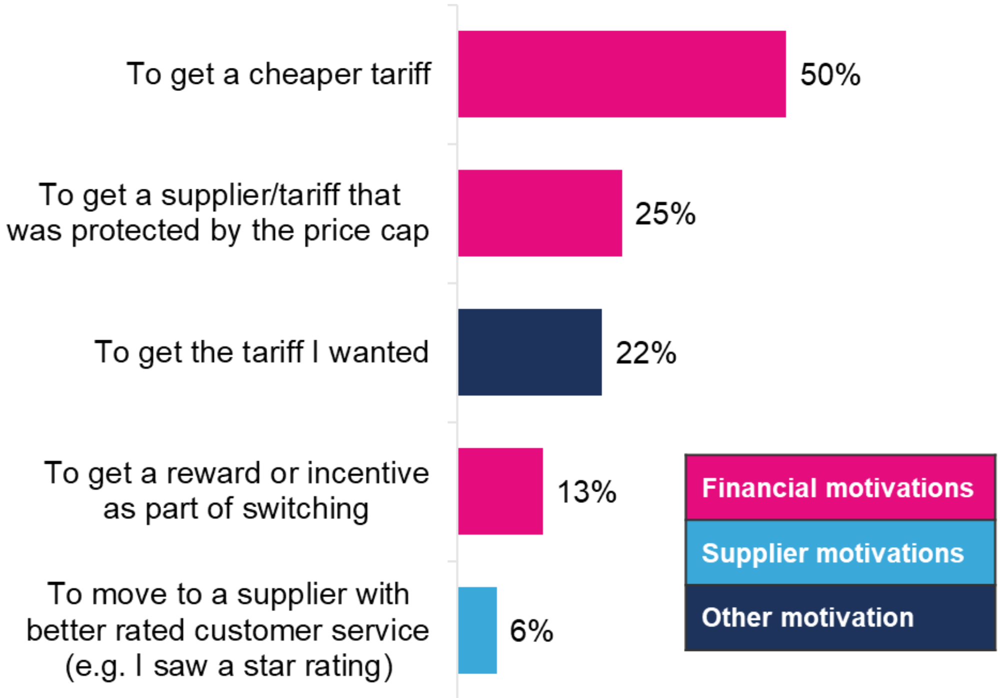


C5a: And why did your household compare?
Base: All who have switched/compared in the past 12 months (1651)

Reasons for switching

Among the 22% who had said they had either switched supplier or switched tariff with the same supplier in the past six months, the top motivation for switching was also financial. Half (50%) of this group said they switched so they could get a cheaper tariff, with a quarter (25%) of this group saying they wanted to get a supplier or tariff that was protected by the price cap. However, there were a greater number of respondents (27%) who claimed that they were currently on a fixed tariff who said that they switched in order to get a tariff protected by the price cap. This shows a level of misunderstanding of the price cap and the types of tariffs that are protected by it and is therefore another example of a lack of energy literacy.[27]

Figure 34: Reasons for switching (top five answers)



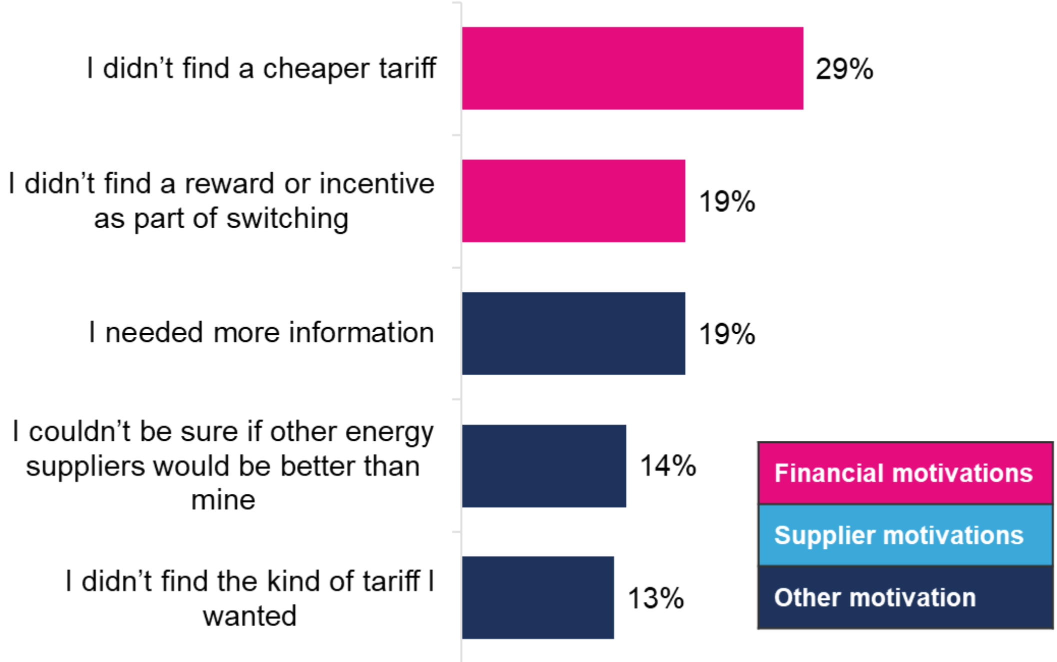
C5b: And why did your household switch <tariff/supplier>?
Base: Those who have switched in past 12 months (754)

[27] It is only possible for consumers on a variable tariff to be on a tariff protected by the price cap.

Reasons for comparing but not switching

Among the 26% who had compared but then did not switch, three in ten (29%) said it was because they did not find a cheaper tariff and one in five (19%) that they did not find a reward or incentive as part of switching. As we've seen with the other recent engagement actions in the market, financial motivations played the biggest role.

Figure 35: Reasons for comparing but not switching (top five answers)



C5c: And after comparing, why did your household not switch tariff or supplier?
Base: Those who have compared but not switched (897)

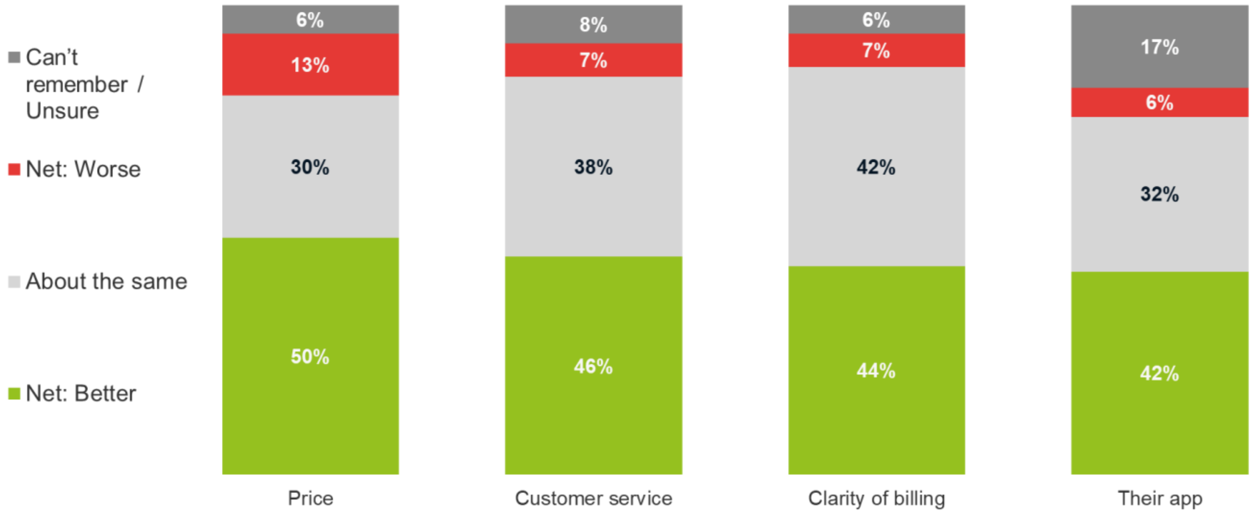
Experiences of switching

Overall experiences of switching to a new supplier

Those who have switched supplier in the past reported a similar or better experience with their new supplier in several respects.

Half (50%) better rated the price of their new supplier compared to their old supplier, which is in line with what we would expect given what we know about financial motivations when switching. Consumers also better rate the customer service (46%), clarity of billing (44%) and the app (42%) of their new supplier.

Figure 36: Experiences of switching to a new supplier



C10. How much better or worse is your new supplier than your old supplier across the following aspects?
Base: Those who have switched (2,446)

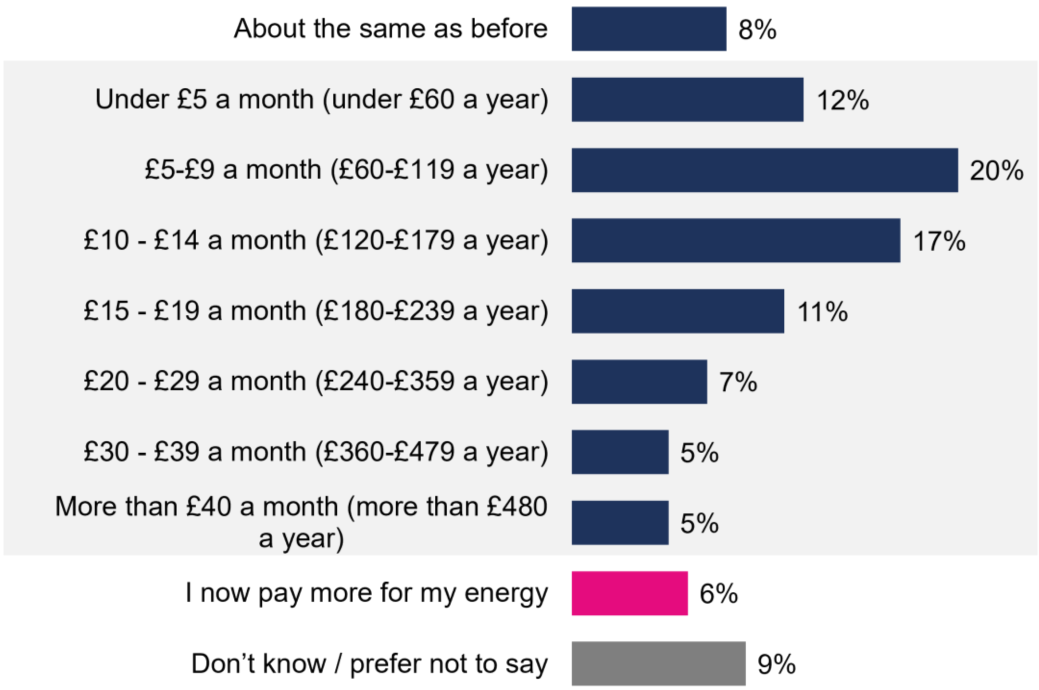
Financial savings by switching

Those who have switched typically reported saving money, reflecting the role financial reasons play in driving switching decisions. Over three quarters (77%) said they have saved money as a result of switching, with the peak of savings reported sitting at around £5-£9 a month (20%). Nearly half (45%) of consumers reported savings of more than £10 per month.

Groups more likely to report making savings a result of switching were:

- those on a time of use tariff (87%).
- standard credit consumers (86%).
- those in the highest energy literacy quartile (82%).
- those with higher supplier satisfaction (79%).

Figure 38: Approximate monthly savings as a result of switching



C11: Compare your current energy deal to your previous deal. Roughly how much, if anything, has switching tariff/supplier saved you per month?
Base: All who have switched (754)

Future market engagement: How likely are consumers to engage in the market and what are the limiting factors to engaging?

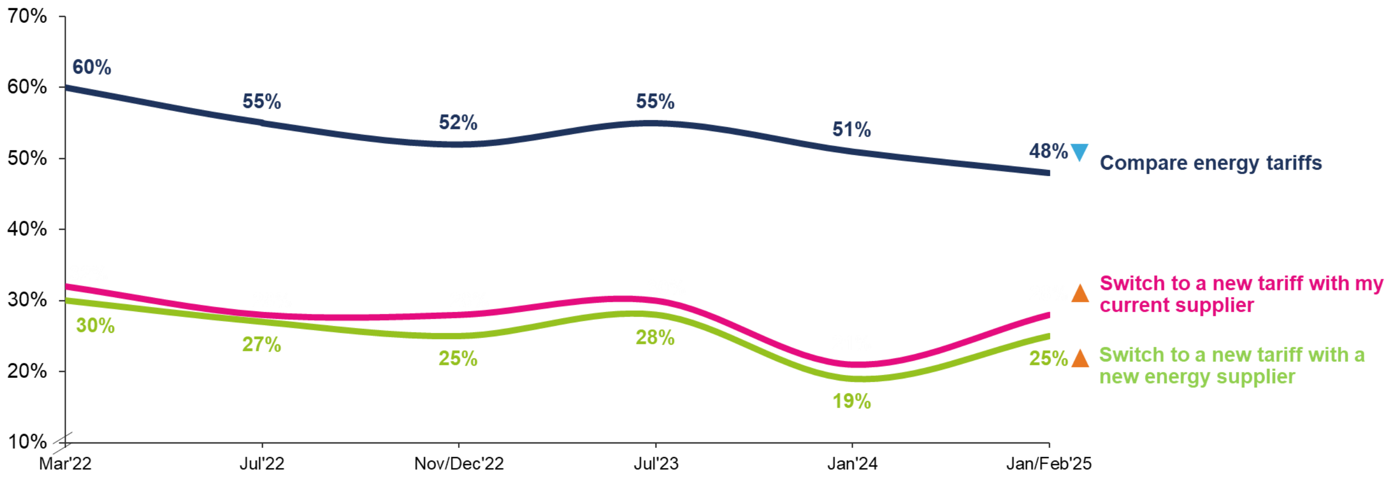
Overview of findings

- **Likelihood to compare or switch returned to previous levels following a dip in January 2024:** more respondents said they were likely to switch tariffs, either with their current supplier or a new one, within the next three months compared to January 2024.
- **Most selected at least one barrier to engagement with the energy market:** the market's complexity was the most commonly identified barrier to engaging with the market in the future. A good existing relationship was close behind.
- **Getting a cheaper tariff remained the strongest motivator to switching:** as seen in previous waves, tariff-related motivations play the biggest role when considering switching to a new deal in the future. Over half of consumers said getting a cheaper tariff was the most important factor when considering switching.

Future engagement

The likelihood of switching in the next three months has returned to previous levels following a dip in January 2024. Over a quarter (28%) said they were likely to switch to a new tariff with their current supplier and a quarter (25%) that it was likely they would switch to a new tariff with a new supplier.

Figure 39: Likelihood to compare or switch in the next three months



D3. How likely do you think it is that you or someone in your household will do these things over the next three months?
Base: All respondents: Mar '22 (W1) 3,479 / July '22 (W2) 3,560 / Dec '22 (W3) 3,457 / July '23 (W4) 3,434 / Jan '24 (W5) 3,439 / Jan/Feb '25 (W6) 3,458

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There were a number of notable differences in this respect by sub-groups:

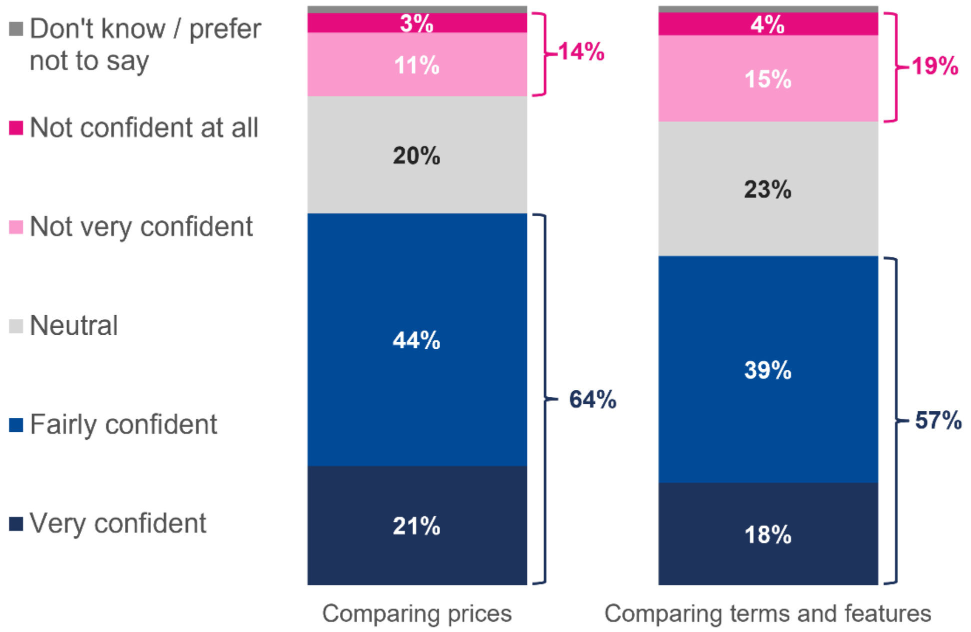
- those in highest energy literacy quartile were more likely to compare (62%), switch to a new tariff (40%) and switch supplier (52%).
- those with high numeracy were more likely to say they will compare energy tariffs (52%), but less likely to switch to a new tariff with their same supplier (26%) or new supplier (22%).
- those behind on their energy bills were more likely to switch tariff (36%) and switch supplier (36%).
- those with no difficulties with their energy bills were less likely to switch tariff (25%) or switch supplier (20%).

Interestingly, those who had engaged with the market recently (compared, switched supplier or switched tariff with the same supplier) were more likely than those who had not engaged in the past six months to do any of the comparing/switching actions. The fact that recent switchers remain open to new deals reinforces the advantages of staying engaged with the market. By comparison, those who have not engaged recently are less likely to do so going forward.

Confidence in comparing

When invited to imagine that they were looking for a new energy deal, two thirds (64%) said they would feel confident in comparing prices, and 57% confident in comparing terms and features. By contrast, 14% said they would not feel confident in comparing prices, and 19% in comparing terms and features.

Figure 40: Confidence in comparing prices and terms and features



C4C. Imagine you were looking for a new energy deal. How confident, if at all, would you feel about understanding and comparing the prices, terms, and features of different energy deals?
Base: All respondents (3,256)

There are several interesting distinctions when analysing confidence in comparing prices within different subgroups, notably financial vulnerability and energy literacy. 88% of those in the highest energy literacy quartile said they were confident in comparing prices compared to just 37% of those in the lowest quartile. With regards to the Financial Vulnerability Classifications, 75% of those 'doing well' were confident in comparing prices, whereas just 57% of those in the highest financially vulnerable situation were confident.

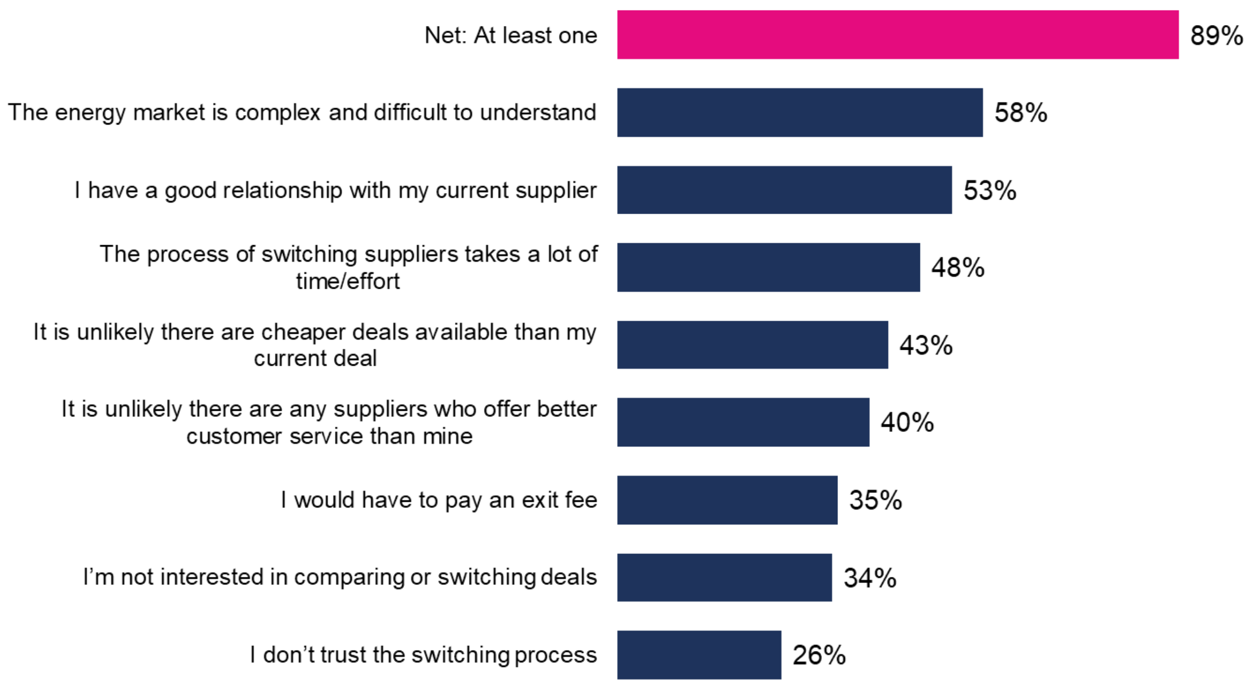
Limiting factors to engaging in the energy market

Although some consumers reported that they were likely to look for new deals in the coming months, 9 in 10 (89%) agreed with at least one of the factors which limit comparing the market for new deals.

58% agreed that the energy market is complex and difficult to understand. Just over half (53%) indicated that they already have a good relationship with their current supplier. Just under half (48%) agreed that the process of switching takes a lot of time and effort.

Other factors, though less prevalent, include that there are not cheaper deals available than their current deal (43%), that it is unlikely there are suppliers with better customer service than their current supplier (40%), that they would have to pay an exit fee (35%), that they are not interested in comparing or switching deals (34%) and that they do not trust the switching process (26%).

Figure *41*: *Agreement with limiting factors to comparing the market for new deals*



D11. To what extent do you agree or disagree with the following statements about comparing the market for new deals?
Base: All respondents (3,437)

Agreement with the factors outlined above varied based on recent engagement in the energy market:

- the 26% who had compared but not switched were more likely to agree that there are not cheaper deals available than their current deal - this is in line with what we know about financial considerations for why they had compared, but not switched.
- the 5% who had switched supplier were more likely to disagree that the process of switching takes a lot of time and effort and disagree that they do not trust the switching process
- the 49% who had not engaged in the past six months were more likely to agree that the energy market is complex and difficult to understand and that they are not interested in comparing or switching deals.

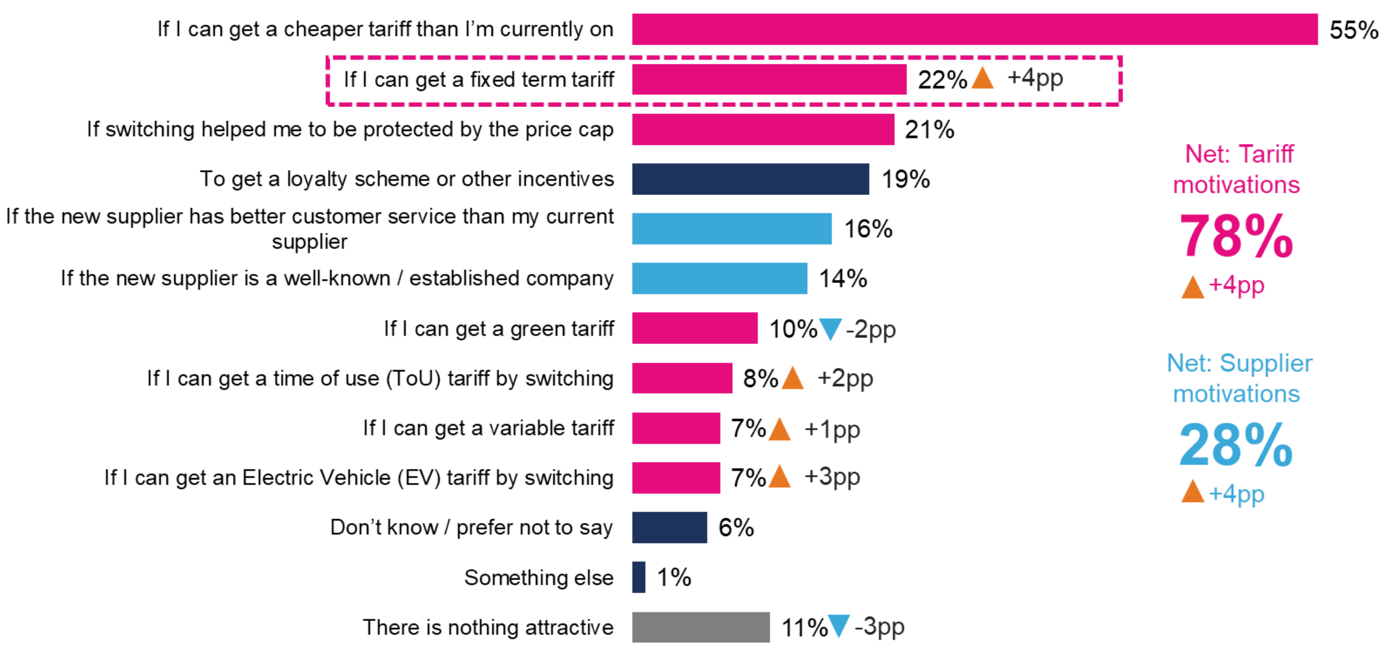
Factors most likely to make consumers switch to a new energy deal

The primary factor that respondents said would motivate them to switch to a new energy deal was if they could get a cheaper tariff at 55%, which is in line with previous waves.

However, as we saw earlier, tariff-related motivations are now playing a bigger role (78% compared to 74% in January 2024). 22% of consumers said that they would be motivated to switch if they could get a fixed tariff, up from 18% in January 2024.

Protection by the price cap (21%) and loyalty schemes or other incentives (19%) were the next most cited motivations.

Figure 42: Factors most likely to make consumers switch to a new energy deal



D13: Which, if any, of the following are most likely to make you want to switch to a new energy deal at the moment?
Base: All respondents (3,458)

Tariff-related motivations were considered a greater motivation for those with high numeracy (83%) and those with the highest financial vulnerability (84%). Given that tariff-related motivations tend to point towards getting a better deal on their tariff, it's perhaps unsurprising that those most financially vulnerable would want to get a better deal – particularly as we've already seen that those behind on their bills were more likely to consider switching supplier or tariff.

On the other hand, standard credit consumers were more likely than average to say supplier motivations would make them want to switch to a new energy deal (32% for standard credit consumers vs. 28% for all consumers), including if the new supplier has better customer service than their current supplier (21% for standard credit consumers vs. 16% for all consumers). This could be due to standard credit consumers reporting a lower level of satisfaction with their current supplier (64%) compared to all consumers (73%). Additionally, in the latest Ofgem Energy Consumer Satisfaction (ESAT) survey data, standard credit consumers reported a higher level of dissatisfaction with the customer service of their current supplier (9% vs. 7% for all consumers).[28]

Financial switching thresholds

Respondents were asked how much cheaper per month another supplier would need to be in order to interest them to switch (if the customer service of the new supplier was just as good as their current supplier). Two thirds (67%) said they would need to see monthly savings of at least £10 a month before they would consider doing so, which reflects the findings from separate tariff choice research conducted by BMG, which found that £100 per year in savings was the approximate 'tipping point' below which consumers became much less likely to consider opting for a new deal.[29]

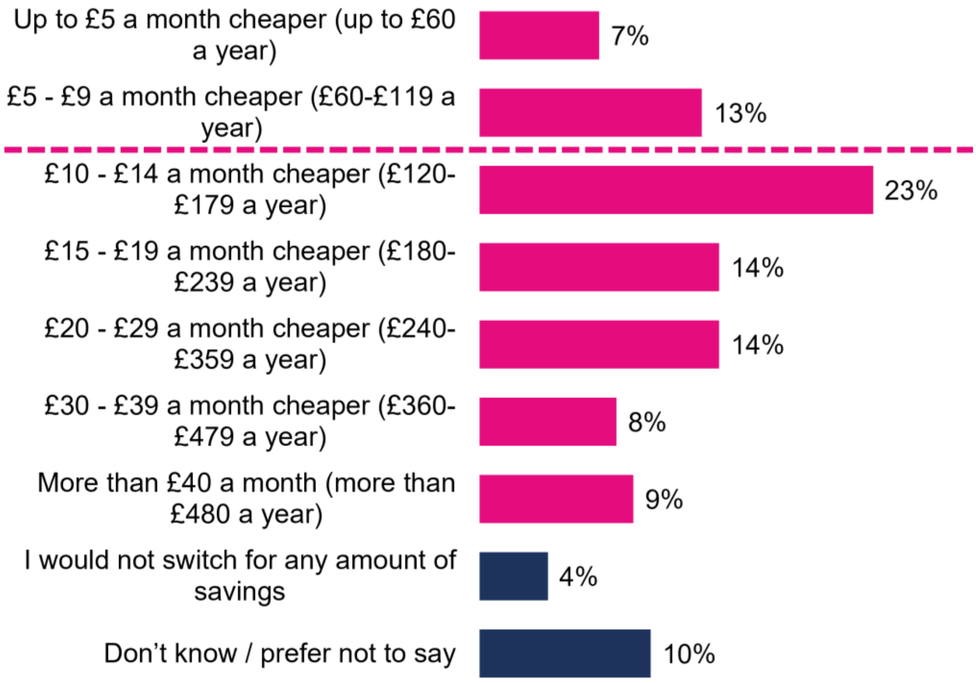
These desired savings broadly reflect the real-life savings of those who had already switched.

Those behind or constantly struggling with their energy bills were more likely to want higher savings if they were to switch compared to those with no difficulties.

[28] The latest Ofgem's Energy Consumer Satisfaction Survey (January 2025) report can be found here (published 13 May 2025).

[29] Tariff choice research: Ofgem consumer research | Ofgem

Figure 43: Amount cheaper a new supplier would need to be to motivate switching



D18: If there was a supplier with customer service just as good as yours, how much cheaper per month would the other supplier need to be to make you interested in switching?
Base: All respondents (3,458)

Appendix

The Financial Vulnerability Classification

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

6% of respondents could not be classified due to answering 'don't know' or 'prefer not to say' to two or more classification questions.

In 2025, BMG conducted a modelling exercise to reduce the number of respondents who could not be classified. We combined data from previous waves and analysed each uncategorised group against key financial indicators. We then assigned each group to the category they most closely aligned with - Doing well, Getting by, in Vulnerable Financial Circumstances , or in highly Vulnerable Financial Circumstances - based on the frequency of alignment across measures.

Gabor-Granger price increase testing

New for the January/February 2025 wave, questions G9A-G9E in the survey asked those on a variable tariff if they would accept their household's bill increasing by an extra £10, £20 or £40 a year if it meant that the price cap changed less frequently.

Those on a variable tariff were split into two sets of equal size - set A and set B.

Set A went **up the scale:**

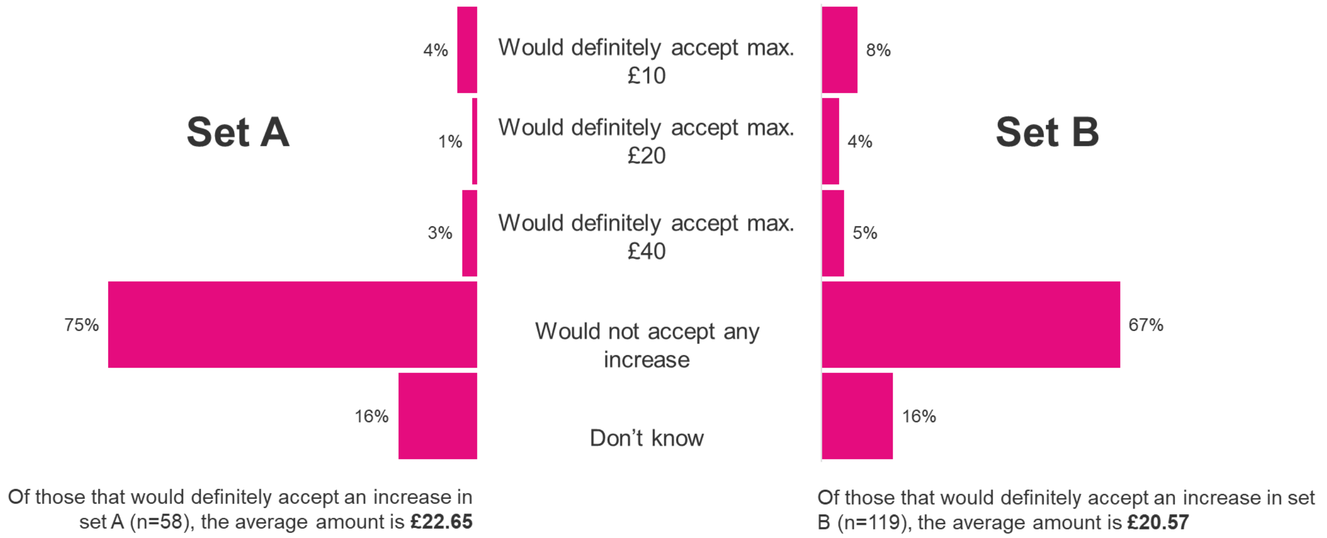
- First shown £10 increase – if they answered 'yes', they would see the next…
- Then shown £20 increase – if they answered 'yes', they would see the next…
- Then shown £40 increase.
- If respondent answered 'no' to any amount, they would not see the next highest amount.

Set B went **down the scale:**

- First shown £40 increase – if they answered 'no', they would see the next…
- Then shown £20 increase – if they answered 'no', they would see the next…
- Then shown £10 increase.
- If respondent answered 'yes,' they would not see the next lowest amount.

When conducting analysis on this question, we reported only on those who said they 'definitely' would accept each amount.

Figure 44: Gabor Granger price increase testing



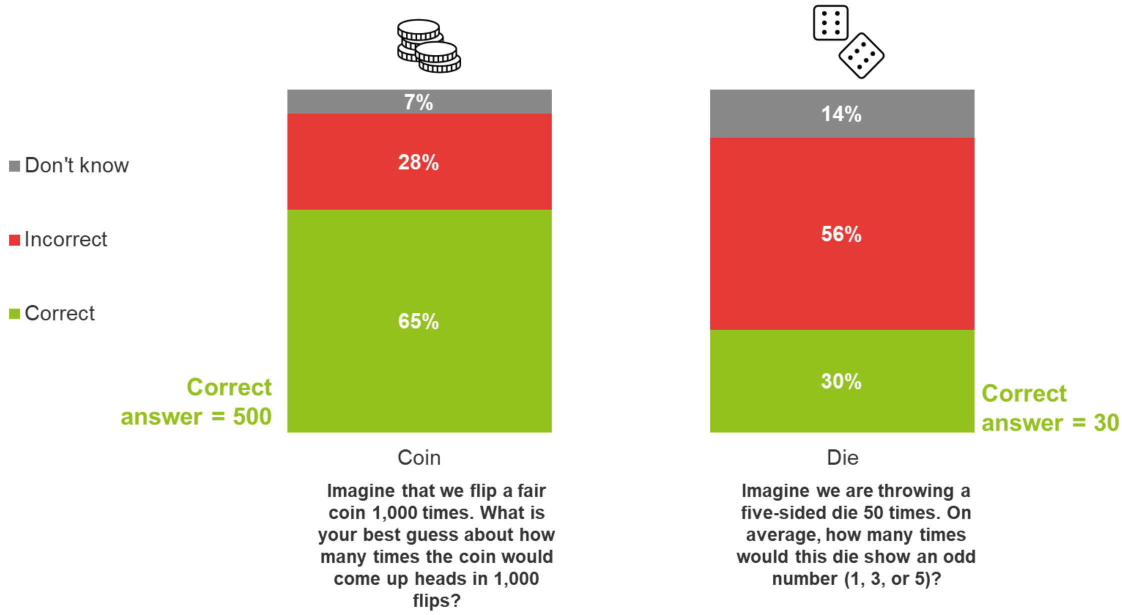
G9A-G9E. Would you accept your household's energy bill increasing by an extra [£10/£20/£40] a year if it meant that the price cap changed less frequently (every 6 months instead of every 3 months)?
Base: Those on a variable tariff (Set A: 709; Set B: 701).

Numeracy testing

New for January/February 2025, respondents were asked two questions that tested their numeracy:

- Imagine that we flip a fair coin 1,000 times. What is your best guess about how many times the coin would come up heads in 1,000 flips?
- Imagine we are throwing a five-sided die 50 times. On average, how many times would this die show an odd number (1, 3, or 5)?

Figure 45: Numeracy testing



SEG3. Imagine that we flip a fair coin 1,000 times. What is your best guess about how many times the coin would come up heads in 1,000 flips? / SEG4: Imagine we are throwing a five-sided die 50 times. On average, how many times would this die show an odd number (1, 3, or 5)?
Base: All respondents (3,458)

Depending on whether they answered correctly, incorrectly or don't know to both questions, respondents were sorted into four groups:

- High numeracy – both questions correct (26%)
- Medium numeracy – only coin question correct (38%)
- Medium numeracy – only die question correct (3%)
- Low numeracy – both questions incorrect or don't know (32%)

Energy literacy quartiles

As outlined earlier in the report, in section Payment method and tariff preferences: How do consumers understand payment methods and tariffs? (see page 31), we created four energy literacy quartiles based on their reported understanding on a number of statements about energy literacy.

We calculated the quartiles by giving each respondent a score based on how well or poorly they rated their understanding of the six energy literacy statements (1 to 5 for very poorly to very well), giving each respondent a score out of 30.

The boundaries for the quartiles were identified by splitting the weighted sample into four from highest to lowest scores. Where scores straddled the boundary between quartiles, respondents in the lower quartiles were bumped up to the one above. This is why there is not an exact 25% split between each quartile.

Respondents were split out as below:

- Highest quartile – 24-30 points (n=1082)
- Upper middle – 21-23 points (n=811)
- Lower middle – 18-20 points (n=821)
- Lowest quartile – 6-17 points (n=744)

Throughout the report we point to the group with high energy literacy and low energy literacy – in these cases, we are referring to the highest quartile and the lowest quartile.

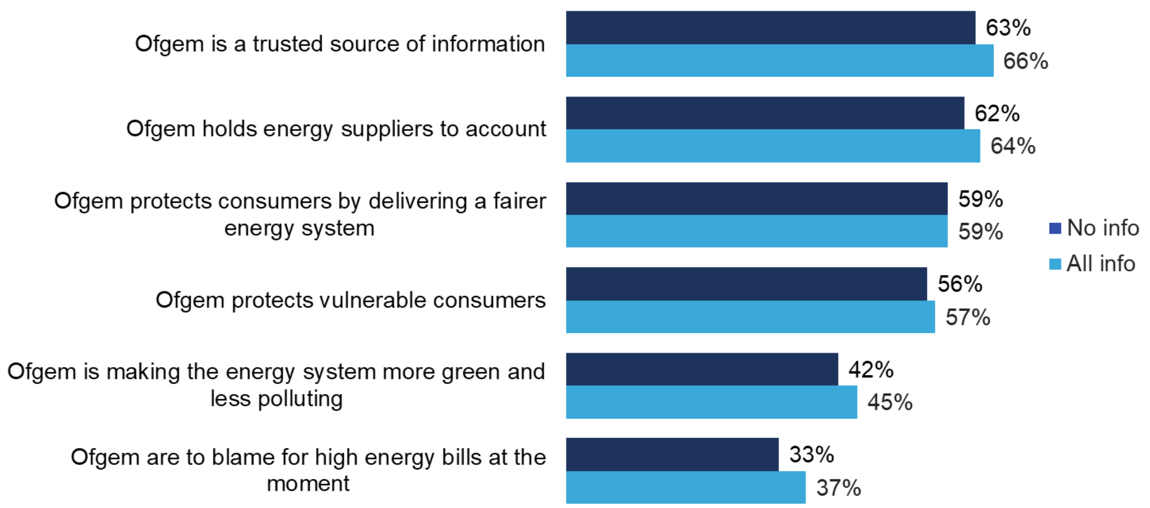
Use of split testing for statements about Ofgem

For the first time this wave, for question 'B12. To what extent do you agree or disagree with the following statements about Ofgem?' (see page 43), one third of respondents (n=685) who were asked this question (those who know at least a little about Ofgem) were shown a small passage about Ofgem before answering:

> "Ofgem is Great Britain's independent energy regulator. It is separate from government. The government is responsible for setting the policy for the energy sector. Ofgem sets the rules which energy suppliers and network operators must follow. Ofgem has duties to protect energy consumers (especially vulnerable people), promote competition and support decarbonisation."

The rest of the sample (n=1199) were not shown any information, in keeping with previous waves. The figure below shows the level of agreement for those that were shown information on Ofgem vs. those that were not. No statistically significant differences between the two groups were recorded.

Figure 46: Agreement with statements about Ofgem



B12. To what extent do you agree or disagree with the following statements about Ofgem? Base: Those who know at least a little about Ofgem (Shown information on Ofgem, 685; No information shown on Ofgem, 1,199)

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