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Energy Consumer Satisfaction Survey

Wave 21: Summary Report of findings (July to August 2025)

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Background and Methodology

Ofgem and Citizens Advice commission a regular survey to understand domestic energy consumers' experiences within the energy market.

The survey covers a range of topics, including:

- Satisfaction with energy suppliers
- Satisfaction with the dimensions of customer service
- Experiences of support for those facing affordability challenges

This research is conducted by BMG Research on behalf of Ofgem and Citizens Advice. The current wave is the fifth carried out by BMG.

Each wave of the survey has approximately 3,500-4,000 domestic energy consumers across Great Britain. Fieldwork for this wave was conducted from the 16th July – 13th August 2025.

This document presents summary findings, focusing on key areas of interest. It does not include the full set of survey topics/questions explored within the research.

We have published this summary report to enable earlier public access to insights, with the full findings due to be published in Winter 2025, along with supplier level findings.

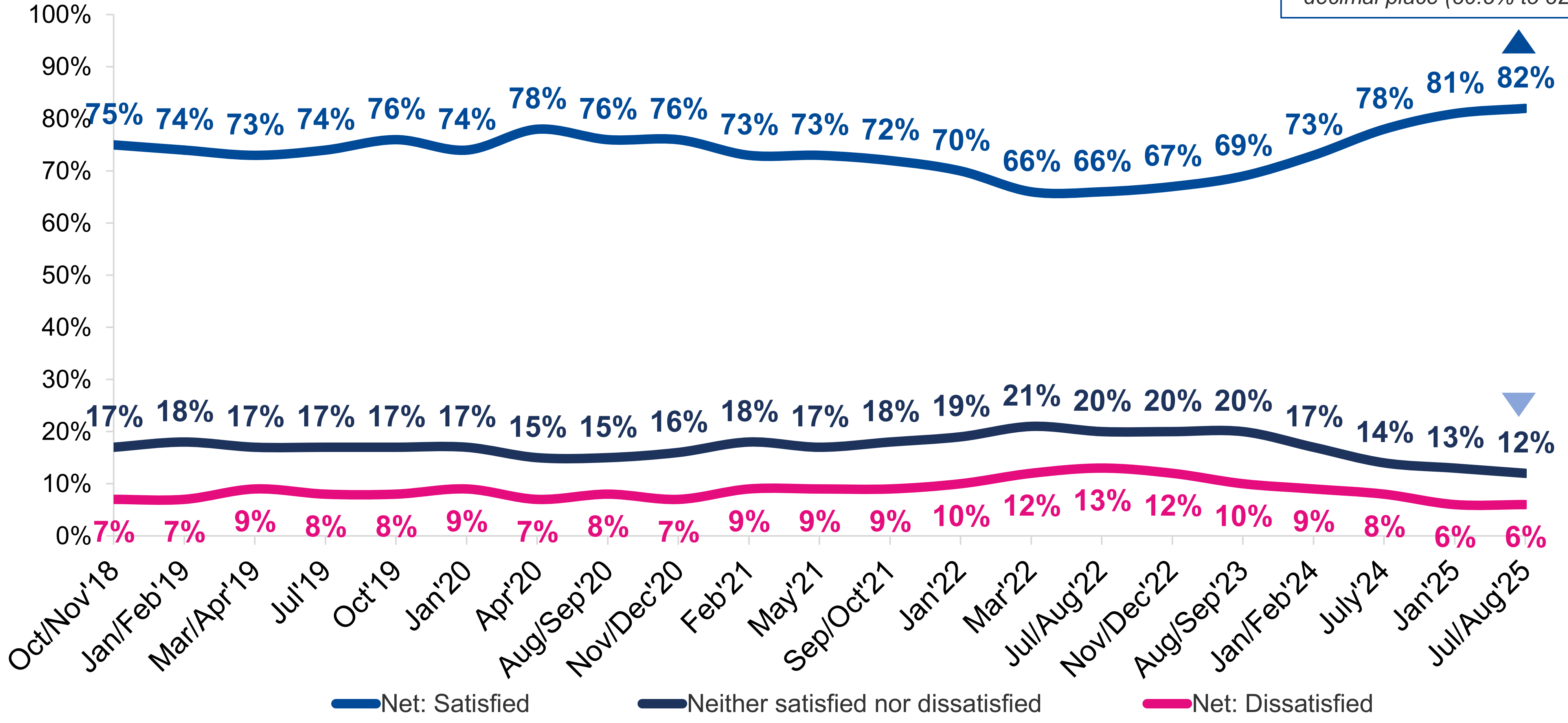
Customer Type	Methodology	Jul/Aug'25 Sample
Digitally enabled general population	Online survey via online panels	3,068
Digitally enabled but less present on panels	Online survey – river sampling	202
Digitally excluded	Face to face	220
Boost of PPM and SC customers*	Online panel and face-to-face	300
Total	All combined	**3,790**

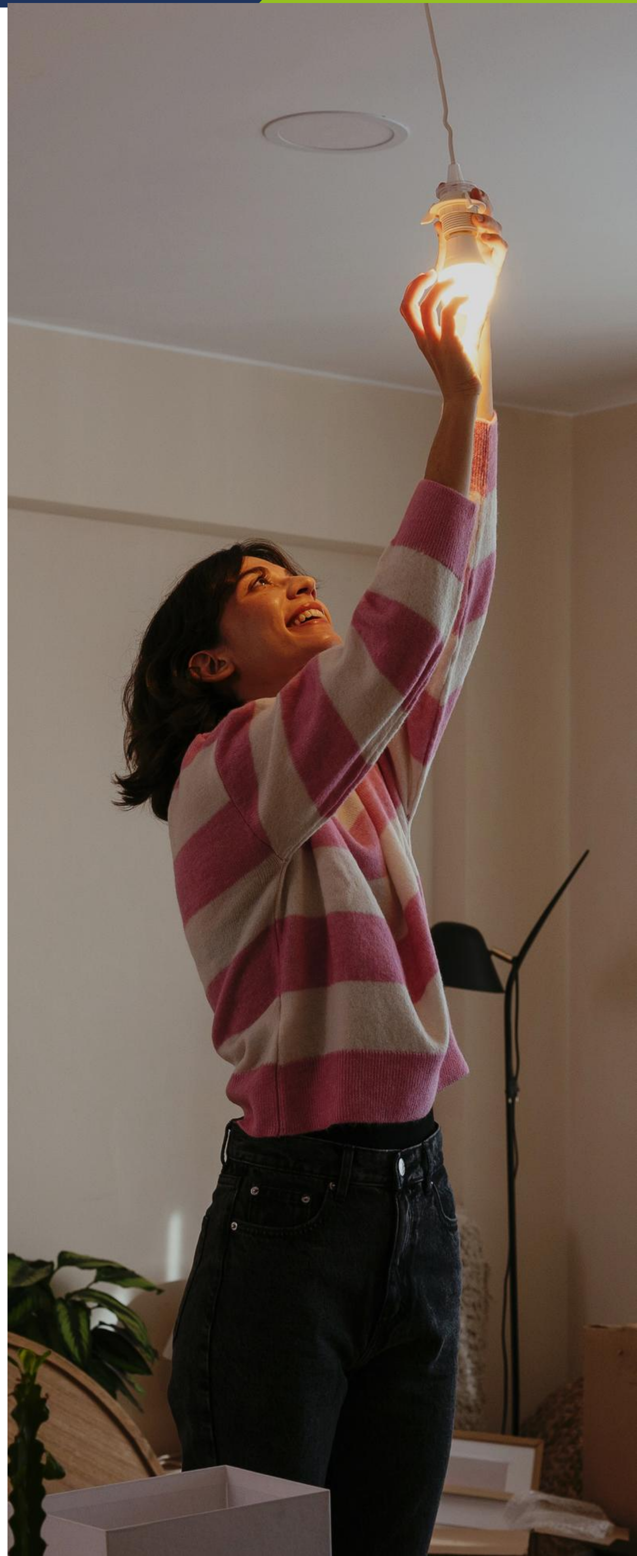
*PPM = Prepayment meter, SC = Standard credit

Overall supplier satisfaction has hit an all time high of 82%, while dissatisfaction remains at a record low of just 6%

Overall Satisfaction Trended Over Time

Statistically significant: while the headline change is 1pp, it's closer to 2pp when shown to one decimal place (80.5% to 82.4%)





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Source: A5: Overall, how satisfied or dissatisfied are you with [supplier] as your supplier of <FUEL TYPE>? Base: All respondents (3,790)

* Please note that the intervals of time between the points at which this tracking survey was conducted are not consistent.

Significant difference from Jul/Aug'25 against Jan'25 at 95% confidence interval

The increase in overall satisfaction continues to coincide with a steady reduction in financial vulnerability

- The proportion of those reporting they are "doing well" financially has been increasing wave-on-wave and is now at 53%. At the same time, the share of vulnerable and highly vulnerable customers has been declining and has done so significantly this wave.

- Customers who are financially secure consistently report higher satisfaction with their supplier, and financial wellbeing was identified as a key contributing factor in our previous wave's key driver analysis (KDA). However, it only explains a small portion of the overall rise in satisfaction. Improvements in customer service experiences and other metrics were also found to have an impact on overall satisfaction. For a full breakdown of the KDA report, see here.

- Compared to last wave, overall satisfaction by the four financial vulnerability groups has remained stable. Over the long-term, satisfaction has risen most for the highly vulnerable group (from 57% to 71%). This shows that while satisfaction is still lower for this group, improvements are being felt across all groups.

Financial Vulnerability Groups*	Aug/Sep'23	Jan/Feb'24	July'24	Jan'25	Jul/Aug'25
Doing well	36%	38%▲	42%▲	46%▲	53%▲
Getting by	16%	14%▼	16%	14%▼	13%
Vulnerable	20%	20%	18%▼	17%	15%▼
Highly vulnerable	21%	21%	17%▼	17%	12%▼
Uncategorised	7%	6%	6%	6%	7%

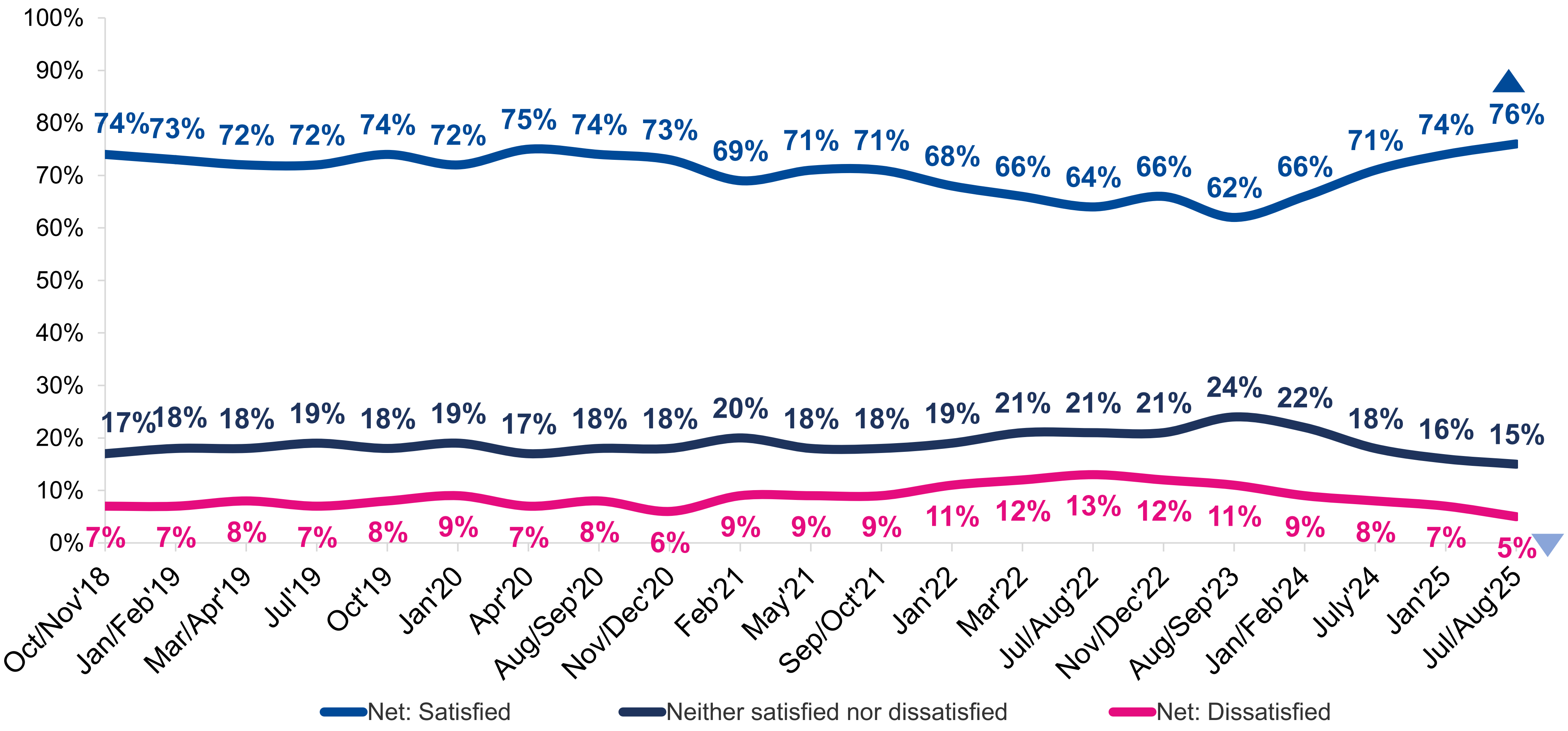
Overall Satisfaction by Financial Vulnerability*	Aug/Sep'23	Jan/Feb'24	July'24	Jan'25	Jul/Aug'25
Doing well (% satisfied)	77%	82%▲	85%▲	88%▲	88%
Getting by (% satisfied)	74%	72%	79%▲	79%	83%
Vulnerable (% satisfied)	64%	69%▲	71%	73%	73%
Highly vulnerable (% satisfied)	57%	64%▲	69%▲	70%	71%

*In Jul/Aug'25, the methodology for classifying customers into financial vulnerability groups was updated to reduce the number of uncategorised customers and improve sample reliability. This involved merging data from the previous four waves and reclassifying uncategorised customers based on their alignment with financial indicators. All figures have been backwards calculated to ensure comparability across waves.

▲▼ Significant difference against previous wave at 95% confidence interval

Customer service satisfaction has also reached a record high of 76%, while dissatisfaction levels are at their lowest ever recorded

Overall Satisfaction with Customer Service Trended Over Time



Source: A7. Overall, how satisfied or dissatisfied are you with the customer service you have received from [supplier]. Base: all respondents (3,790).

Significant difference from Jul/Aug'25 against Jan'25 at 95% confidence interval

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Customer satisfaction across individual customer service metrics are showing consistent improvements

- **Billing accuracy** has improved wave-on-wave, increasing from 70% in Aug/Sep'23 to 82% in Jul/Aug'25.
- **Ease of understanding the bill** has improved for the second wave in a row, now at 85%.
- **Bill delivery timing,** first asked in Jan '25, has seen an improvement in satisfaction, rising from 87% to 90% in Jul/Aug'25.
- **Ease of contacting suppliers** has continued to improve, rising from 60% in Aug/Sep '23 to 77% in Jul/Aug '25, a fourth successive increase.
- **Satisfaction with information received** has remained stable at 85%.
- **Complaint handling** has seen an improvement this wave (the difference is statistically significant, but the size of the change is subject to greater error due to relatively low sample size, so comparisons should be interpreted with caution).

Customer Service Metrics	Aug/Sep'23	Jan/Feb'24	July'24	Jan'25	Jul/Aug'25
Billing accuracy (% satisfied)	70%	74% ▲	77% ▲	80% ▲	82% ▲
Ease of understanding the bill (% satisfied)	71%	78% ▲	78%	82% ▲	85% ▲
When bill is delivered (% satisfied)	n/a	n/a	n/a	87%	90% ▲
Ease of contacting supplier (% easy)	60%	65% ▲	70% ▲	75% ▲	77% ▲
Overall satisfaction for those contacted	71%	72%	77% ▲	84% ▲	86%
Information received (% satisfied)	74%	75%	78% ▲	84% ▲	85%
% that made a complaint**	4%	2% ▼	3%	2%	3%
Handling of the complaint (% satisfied)	41%	36%*	47%*	44%*	66% ▲

Interpret with caution as relatively low base sizes

* Please note that while this is a relatively large % point change, this isn't a statistically significant increase on the previous wave given a low base size (Aug/Sep'23: 149, Jan/Feb'24: 101, Jul'24: 124, Jan'25: 89, Jul'Aug'25: 120). **The figure in the table shows the share of total sample who have made a complaint, the share of those who contacted/tried to contact their supplier to make a complaint is 8%.

▲▼ Significant difference against previous wave at 95% confidence interval

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The proportion of customers who have fallen behind on their energy payments remain in-line with previous waves but supplier to customer support has increased

- **Customers falling behind/running out of credit for affordability reasons** remains in line with previous waves.
  - It is important to note that this research reflects customers' perceptions, and that other data sources may not reflect these findings at time of reporting*. For instance, we are continuing to see a rise in the overall level of domestic debt and arrears**.
- **Customers who were contacted by their supplier for support** has increased from 14% in Jan '25 to 20% this wave, and the share of customers who received no contact has dropped from 29% to 20%.
- **Satisfaction with the support received after falling behind** has remained high, now at 78% in Jul/Aug'25. Not only are more customers being contacted by their supplier, but the quality of support is increasing, leading to better experiences for those facing affordability challenges.
- While the overall proportion of customers falling behind and receiving support has remained stable, suppliers are increasingly offering bill repayment holidays - up from 11% in Jan'25 to 17% in Jul/Aug'25.

Customers Behind On Energy Payments	Aug/Sep'23	Jan/Feb'24	July'24	Jan'25	Jul/Aug'25
% fallen behind/ran out of credit (all payment types)***	12%	11%	10%	10%	10%
% fallen behind on direct debit	9%	7%	7%	7%	7%
% fallen behind on standard credit	27%	20% ▼	20%	17%	20%
% run out of credit on PPM	21%	21%	17% ▼	17%	15%

Supplier Support Metrics	Aug/Sep'23	Jan/Feb'24	July'24	Jan'25	Jul/Aug'25
% contacted by their supplier for support	17%	12% ▼	18% ▲	14%	20% ▲
% contacted their supplier for support	48%	48%	53%	55%	58%
% received no contact	32%	38%	27% ▼	29%	20% ▼
% satisfied with support received	63%	61%	69% ▲	72%	78%

▲▼ Significant difference against previous wave at 95% confidence interval

*For example, Ofgem data on debt and arrears and Citizens Advice data on cost of living support.

**Ofgem data on debt and arrears

***This figure is the net: fallen behind or run out of credit across all payment types.

Satisfaction with smart meters remains relatively high at 77%

- **The proportion of customers with a smart meter** has increased over time, rising from 62% in Aug/Sep'23 to 71% in Jul/Aug'25. This reflects official statistics (Aug '25) of smart meter ownership.
- **Satisfaction with smart meters** remains stable this wave, at 77%. As adoption increases, customer experiences with smart meters continues to be generally positive.
- **Satisfaction with services received via the PSR** has increased this wave to 73%, up from 68% in Jan'25.

- **Satisfaction with the overall switching process** remains stable, at 85% this wave, indicating that the majority of customers who have switched suppliers in the past 12 months continue to find the process straightforward.
- **Satisfaction with the ease of comparing suppliers and prices** peaked at 80% in Jan'25 and remains stable at 77% this wave.

Other Metrics	Aug/Sep'23	Jan/Feb'24	July'24	Jan'25	Jul/Aug'25
% who have a smart meter (for either mains gas, electricity or both)	62%	62%	65%▲	68%▲	71%▲
Satisfaction with smart meter	67%	68%	72%▲	76%▲	77%
Satisfaction with services received on the PSR	64%	61%	71%▲	68%	73%▲

Switching and Comparing Suppliers	Aug/Sep'23	Jan/Feb'24	July'24	Jan'25	Jul/Aug'25
Satisfaction with the overall switching process	82%	82%	85%	86%	85%
Satisfaction with ease of comparing suppliers and their prices	66%	72%	79%	80%	77%

▲▼ Significant difference against previous wave at 95% confidence interval an RSK company

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