

Energy Consumer Satisfaction Survey

Wave 21 (July/August 2025)
findings

December 2025

ofgem

citizens
advice

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Ofgem Foreword



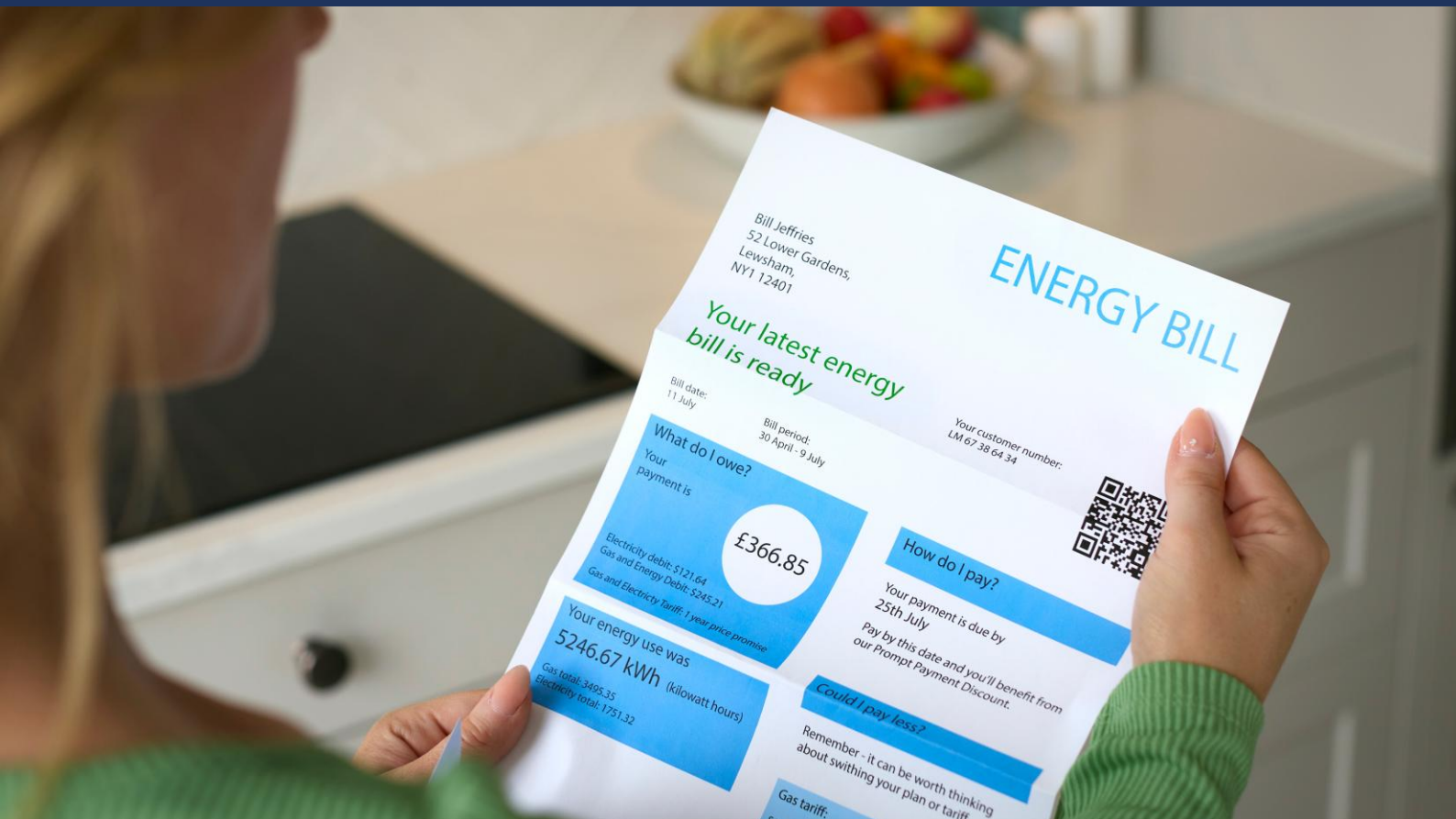
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Ofgem Foreword

In November 2025, Ofgem published a call for input seeking views on a set of proposed 'Consumer Outcomes'. These are intended to represent a clear set of expectations focused on the outcomes we want consumers to experience in the energy industry and will ensure that Ofgem's rules embrace competition, enable innovation, and support growth while protecting consumers, now and in the future. Now, more than ever, it is important that energy suppliers deliver quality customer service for consumers that deliver against these outcomes.

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

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

This report details findings from the 21st wave of the Energy Consumer Satisfaction Survey, drawing on research conducted in July to August 2025. We are pleased to see satisfaction increasing but there is more to be done. We are concerned where particular groups continue to experience poorer outcomes in the market. We have seen that when things go wrong the impact can be serious, especially for the most vulnerable. In these circumstances it is only right that we set the highest of standards for our energy suppliers. Ofgem will continue to use data from the Energy Consumer Satisfaction Survey, as well as other sources of consumer insight, to monitor consumer experiences and to help feed into our ongoing consumer outcomes work.

The next wave of research for this survey is due to take place in early 2026.





Executive Summary

Introduction

This tracking survey provides Ofgem and Citizens Advice with insight into domestic consumers' perceptions about the quality of service delivered by energy suppliers. This survey has been running regularly since 2018. It takes a mixed mode approach to data collection, using online and face-to-face interviewing. The findings for the July/August 2025 wave are based on 3,790 interviews with a representative sample of energy bill payers across Great Britain. This report builds on the [summary report](#) published following completion of fieldwork.

Consumer satisfaction with energy suppliers continues to increase and has reached an all-time high

Overall satisfaction has increased for the fifth consecutive wave, reaching 82% in July/August 2025 from 81% in January 2025, the highest level recorded since tracking began in 2018. There is also a higher proportion of customers who are 'very satisfied' with their supplier this wave, increasing to 42% from 38%.

Satisfaction continues to be high despite the price cap remaining above pre-crisis levels.

This report will discuss the multitude of factors that could be contributing to an increase in overall satisfaction. We think that five factors might be playing a bigger role:

- **Financial vulnerability:** A greater number of customers are classified as 'doing well' in our Financial Vulnerability Classification¹, with this group typically reporting a higher level of satisfaction.²
- **Contact and billing:** Both contact and billing experiences have improved since January 2025. Our Key Drivers Analysis in July 2025 found that both metrics are important contributors to overall satisfaction.³
- **Contact preferences:** There is an ongoing shift away from telephone contact to online channels, with customers reporting better and easier experiences contacting their supplier via online methods.
- **Smart meters:** Smart meter ownership is continuing to grow, while satisfaction among this group also continues to increase. Non-smart meter households record no similar rise and continue to be less satisfied overall.
- **Payment type:** There is greater parity in satisfaction across the payment types compared to previous waves. Satisfaction is highest among prepayment meter customers, while standard credit has also recorded a rise since January.

Customer service satisfaction also reached a new high

Overall customer service satisfaction has also increased to a new high in July/August 2025, reaching 76% from 74% in January 2025. As with overall satisfaction, there is a higher proportion of customers who report that they are 'very satisfied' with their supplier's customer service compared to last wave (40% cf. 37%).

Various metrics on billing have increased this wave and also reached new highs. Satisfaction with the ease in understanding their bill has increased to 85% (cf. 82%), satisfaction with the accuracy of their bill has

¹ Please see page 15 for a breakdown of how the Financial Vulnerability Classifications are calculated.

² Consumers' financial circumstances was the strongest predictor of satisfaction in the demographic and energy characteristics model of the Key Drivers Analysis.

³ The full findings of the Key Drivers Analysis can be found [here](#).

increased to 82% (cf. 80%), and satisfaction with when their bill is delivered has also increased to 90% (cf. 87%).

The number of customers who found it easy to contact their supplier has also reached a new high (77%), with a greater number finding it 'very easy' compared to January 2025 (42% cf. 39%).

Complaint levels remain stable, with 3% of all respondents reporting they made a complaint. However, there has been a positive movement in satisfaction with how complaints are handled and the time taken for complaints to be resolved.

Some challenges still remain with customer service

Despite improvements for most customer service key metrics, around half (48%) of customers who contacted their supplier still report experiencing at least one difficulty with the contact, most commonly delays between responses (18%) and long wait times (15%). While these issues are less prevalent than in previous waves, they continue to shape customer experiences and highlight areas for further improvement.

Financial circumstances continue to shape consumer experiences

There are a greater number of consumers who are classified as 'doing well' under our Financial Vulnerability Classification (53% in July/August 2025 up from 46% in January 2025). Correspondingly, fewer are 'financially vulnerable' (15% this wave vs. 17% in January) and 'highly financially vulnerable' (12% this wave vs. 17% in January).

Those classified as 'doing well' typically report higher satisfaction – in fact, there is a 17-percentage point gap in satisfaction between those classified as 'doing well' (88%) and those classified as 'highly financially vulnerable' (71%). The change in the proportions of those in each category could be contributing to a higher overall satisfaction across the board.

However, it's important to note that despite broader improvements in reported financial circumstances, many households remain in financially vulnerable categories and the share of customers owing money or running out of credit remains unchanged since January 2025 (10%). Additionally, official data from Ofgem on debt and arrears indicates that the average level of debt is increasing over time.⁴

An increasing number of customers are in contact with their supplier for support in paying bills (78% up from 69% in January). Over time, this has largely been driven by customers proactively reaching out themselves, but in this wave, we see supplier-initiated contact has also risen (20% from 14% in January), matching its previous high.

Satisfaction with bill support received from suppliers for customers who have fallen behind or run out of credit for affordability reasons is improving – the share who are 'very satisfied' with this has risen from 34% to 43%.

Smart meter ownership is increasing, though a sizeable minority report issues

Self-reported smart meter ownership continues to increase, now reaching 7 in 10 households (71%, up from 68% in January 2025) – largely in line with the official figures on smart-meter ownership⁵.

Smart meter customers typically report a higher level of overall satisfaction compared to non-smart meter customers. Satisfaction for smart meter owners has also continued to grow over time, now reaching 86% compared to 83% in January 2025. This suggests that a growing number of smart meter owners could be contributing to the positive shift in overall satisfaction.

However, despite positive smart meter satisfaction, one third (36%) of customers report experiencing at least one issue in the past 6 months.

⁴ [Debt and arrears indicators | Ofgem](#)

⁵ [Q2 2025 Smart Meters Statistics Report](#)



Background and research objectives

Background

This report, setting out results from July/August 2025 (wave 21), provides Ofgem and Citizens Advice with evidence on consumers' experiences and outcomes in the energy market. It helps to assess whether energy consumers in Great Britain are getting the quality of service and support they need and expect from their suppliers.

Conducted by BMG Research, a representative sample of 3,790 domestic energy consumers across Great Britain were surveyed. The survey encompasses various topics, including consumers' overall satisfaction, perceptions of various dimensions of customer service, and experiences relating to supplier support for those struggling with energy affordability.

Research objectives

This research is intended to answer four overarching questions:

- 1. How satisfied are consumers with the overall service their energy suppliers are providing?**
 - What is the overall satisfaction with energy suppliers, and how does this compare over time?
 - How do satisfaction levels and experiences vary across different customer groups (e.g. how they pay for energy, vulnerability characteristics and other demographic factors)?
 - What are the reasons behind customer satisfaction and dissatisfaction?
- 2. How satisfied are consumers with key customer service dimensions?**
 - How satisfied are consumers with the customer service provided by their suppliers?
 - What are the levels of satisfaction with the billing process?
 - What are consumers' experiences of contacting suppliers?
 - What is the consumer experience when making complaints?
 - Are consumers satisfied with the information they receive from their suppliers?
- 3. What are the experiences of customers struggling financially?**
 - Which groups are most likely to be falling behind or running out of credit?
 - What are the experiences of consumers falling into debt?
 - Are they in contact with suppliers about receiving help and support?
 - For prepayment meter customers, what support are they receiving if they run out of credit?
- 4. How satisfied are consumers with other supplier interactions and services?**
 - What are consumers' experiences of smart meters?
 - What are the practical challenges of topping up their prepayment meter?
 - What are the experiences of services received through the Priority Services Register⁶ and other services from the supplier?
 - What are the levels of satisfaction with the process of switching suppliers?

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

Method

Timing of fieldwork

This is the fifth wave of this survey run by BMG Research. Fieldwork for this wave was conducted between the 16th July and 13th August 2025. Fieldwork was concluded before the price cap increase announcement on 27th August 2025.⁷

Comparisons to the previous waves are for 16th to 31st January 2025 (wave 20), 10th July to 1st August 2024 (wave 19), 18th January to 10th February 2024 (wave 18) and 30th August to 18th September 2023 (wave 17).

Data collection method

Quotas were set to ensure a representative sample of the GB population of households. Results were weighted overall by age, gender, region, indices of multiple deprivation (IMD), ethnicity, and payment type. The methodology is consistent with the previous four waves (waves 17, 18, 19 and 20) and details of updates applied in wave 17 can be found in the accompanying technical report [here](#).

- The latest wave comprised 3,790 respondents in total, which carries a maximum confidence interval of $\pm 1.59\%$. The data was collected through a combination of three methods:
 - 3,068 consumers took part via online interview panels to capture the digitally enabled population
 - 202 consumers participated through online river sampling to capture those who are digitally enabled but typically less present on panels⁸
 - 220 digitally excluded consumers were interviewed face-to-face.
- An additional 300 boost interviews were conducted, comprising of prepayment meter and standard credit customers via online panel and face-to-face interviews. This increased the sample size to allow for more robust estimates and analysis for these groups. Boost cases were combined with the main sample and then down-weighted to ensure the overall results remained representative.

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

Notes on statistical significance

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

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

⁷ [Energy price cap will rise by 2% from October | Ofgem](#)

⁸ River sampling is an online sampling method that recruits respondents who are not panel members by inviting them to the survey while they are completing another online activity. It allows us to reach people who, for whatever reason, would not join a panel to take surveys regularly. Using this approach helps attract a broader spread of online users.



Detailed findings

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

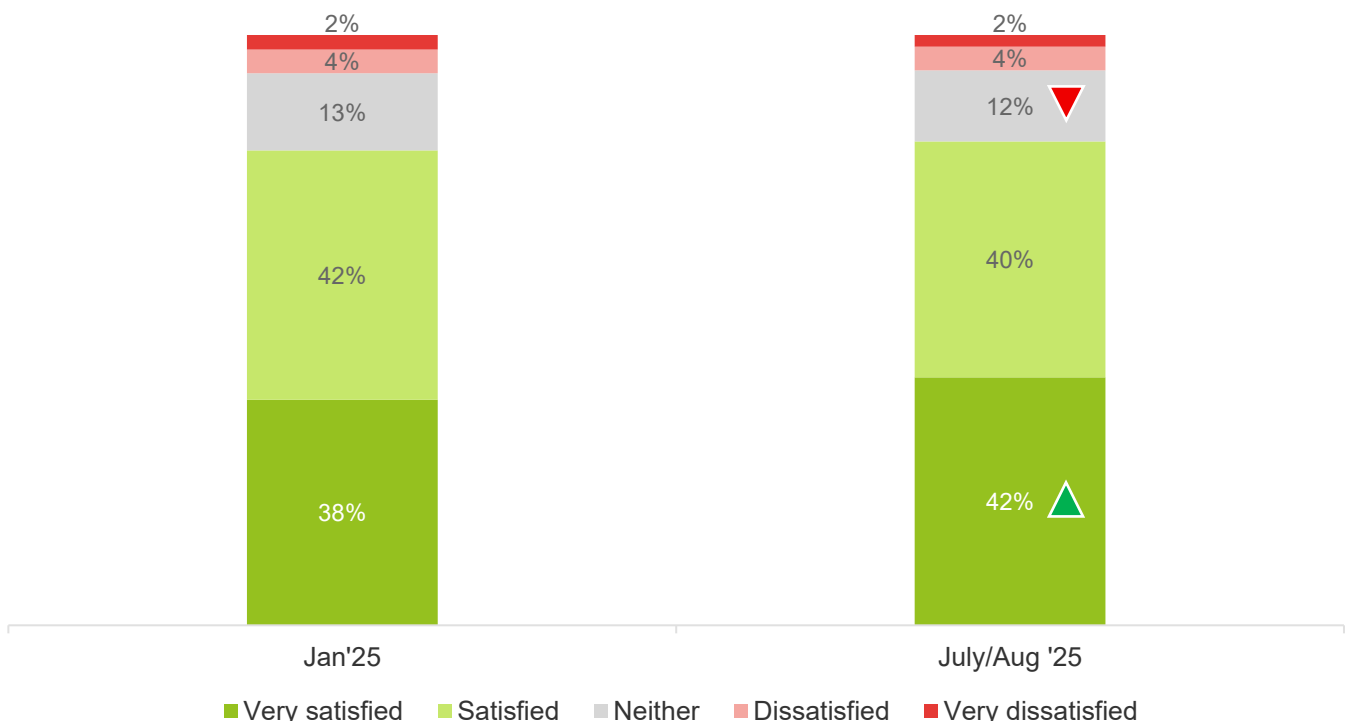
Overview of findings

- **Overall satisfaction has continued to increase to a new high of 82%:** for a fifth consecutive wave overall supplier satisfaction has increased. This increase is primarily driven by a higher proportion of those who said they were very satisfied (42% cf. 38%).
- **Reasons for satisfaction levels influenced by pricing:** when asked the reasons for their satisfaction or dissatisfaction, prices continue to be an important factor. However, other elements such as customer service are also at play.
- **The gap in satisfaction between the three payment types has closed:** when looking back to January 2024, direct debit customers were markedly more satisfied than those who pay via standard credit and prepayment meter. However, in the latest wave, the gap between the three payment types has closed, with all reporting similar levels of overall satisfaction.

Overall satisfaction

Overall supplier satisfaction has recorded a new all-time high of 82%, increasing from 81% in January. This wave recorded a higher proportion of very satisfied customers, increasing from 38% to 42%.

Figure 1: Overall satisfaction with supplier



A5: Overall, how satisfied or dissatisfied are you with [supplier] as your supplier of <FUEL TYPE>? Base: All respondents: Jul/Aug'25 (3,790), Jan'25 (3,854). Data labels not shown for values below 3%. Unsure (0%) and prefer not to say (0%) not shown here.

As shown in figure 2 overleaf, since November/December 2022 there have been five consecutive increases in overall satisfaction. However, when looking at the upward trendline, wave-by-wave increases have become smaller in the more recent waves, suggesting that satisfaction may start to plateau.

The proportion of consumers reporting dissatisfaction has remained stable at 6%, following a decline from 8% in July 2024 to 6% in January 2025, and so remains at the lowest level since tracking began.

Subgroups that reported a higher level of dissatisfaction include:

- Renters (8%), including renters in social housing (10%)
- Digitally excluded consumers (9%)
- Those with an annual household income of less than £20,000 (9%)
- Those who reside in flats (8%)
- Consumers with a disability (8%)

All of the above groups are disproportionately more likely to be classed as 'financially vulnerable' using our financial classification groups. Accordingly, it is possible that consumers' financial circumstances are contributing to a higher dissatisfaction, rather than the individual factors listed in isolation. Financial vulnerability and the impact it has on satisfaction is explored in greater depth in the section Financial pressures and value for money.

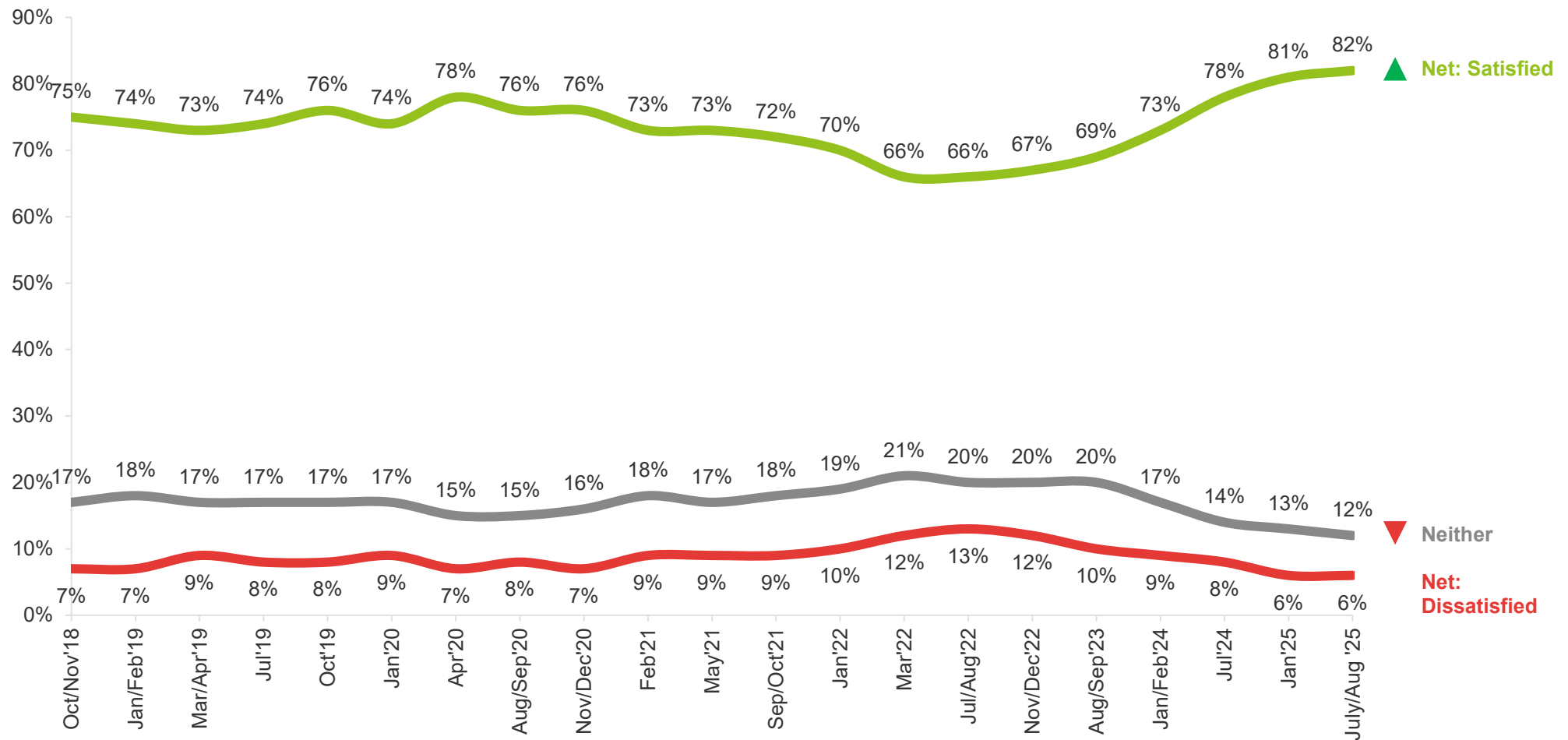
BMG conducted a Key Drivers Analysis (KDA) in July 2025 which found that when controlling for all other demographic and energy factors, financial vulnerability was the strongest factor influencing overall satisfaction – even higher than the supplier respondents were with (using the demographic and energy characteristic model).⁹

Furthermore, over the past two years the price cap level has varied but remained relatively flat overall. However, prices still remain above pre-crisis levels. This means that overall satisfaction has continued to increase despite a time of comparatively high prices.



⁹ The KDA relative importance scores for overall satisfaction placed Financial Vulnerability as the top factor in the demographic and energy characteristic model, with a R-Square value of 11.6%. The full findings of the Key Drivers Analysis can be found [here](#).

Figure 2: Overall satisfaction with supplier over time



A5: Overall, how satisfied or dissatisfied are you with [supplier] as your supplier of <FUEL TYPE>? Base: All respondents: Jul/Aug'25 (3,790), Jan'25 (3,854), Jul'24 (3,750), Jan/Feb'24 (3,855), Aug/Sep'23 (3,742)

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

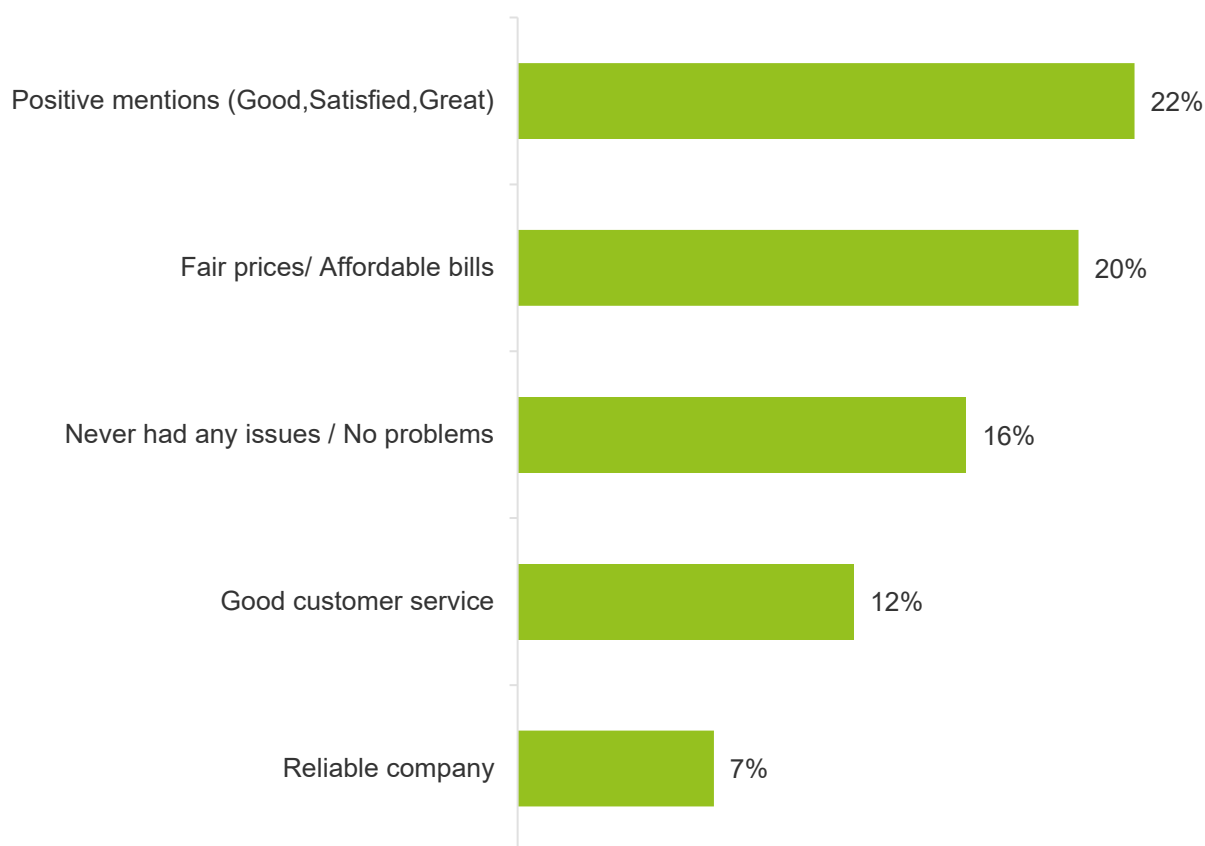
Reasons for level of satisfaction

Reasons for satisfaction

Respondents in the survey are asked to explain in their own words the reasons for why they are satisfied, neither satisfied nor dissatisfied, or dissatisfied with their supplier overall. These reasons are then coded into themes and presented below. The main reasons for each remain broadly in line with coded responses reported in previous waves.

Among the 82% satisfied overall, 20% cited fair prices and affordable bills, 12% cited good customer service and 7% said their supplier was a reliable company. 16% said they were satisfied as they had never experienced any issues or problems, pointing to the mostly passive relationship consumers have with their energy supplier.

Figure 3: Reasons for satisfaction

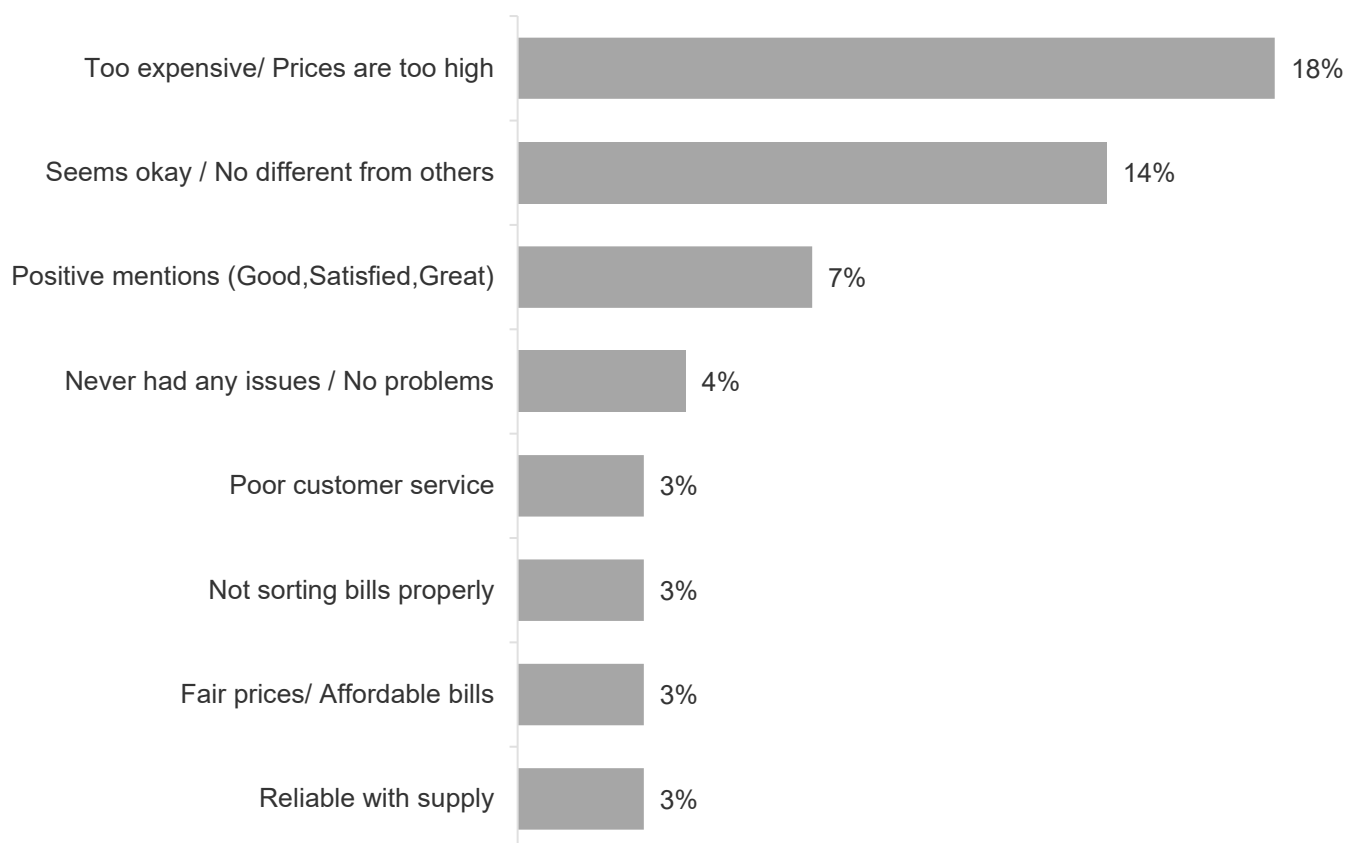


A6: [CODED] Why are you with satisfied with [supplier] as your supplier of <FUEL TYPE>? Base: Satisfied (3,138). Top 5 reasons shown.

Reasons for being neither satisfied nor dissatisfied

For the 12% neither satisfied nor dissatisfied customers, the top reason cited was that prices are too high/expensive (18%). Typically, a response of neither satisfied nor dissatisfied leans more towards a negative response rather than positive. This is demonstrated in the coded responses shown in figure 4 – there were more negative responses than positive ones. Additionally, a sizeable number gave a passive reason – 14% said that their supplier seemed okay/no different from others and 4% said they never experienced any issues.

Figure 4: Reasons for being neither satisfied nor dissatisfied



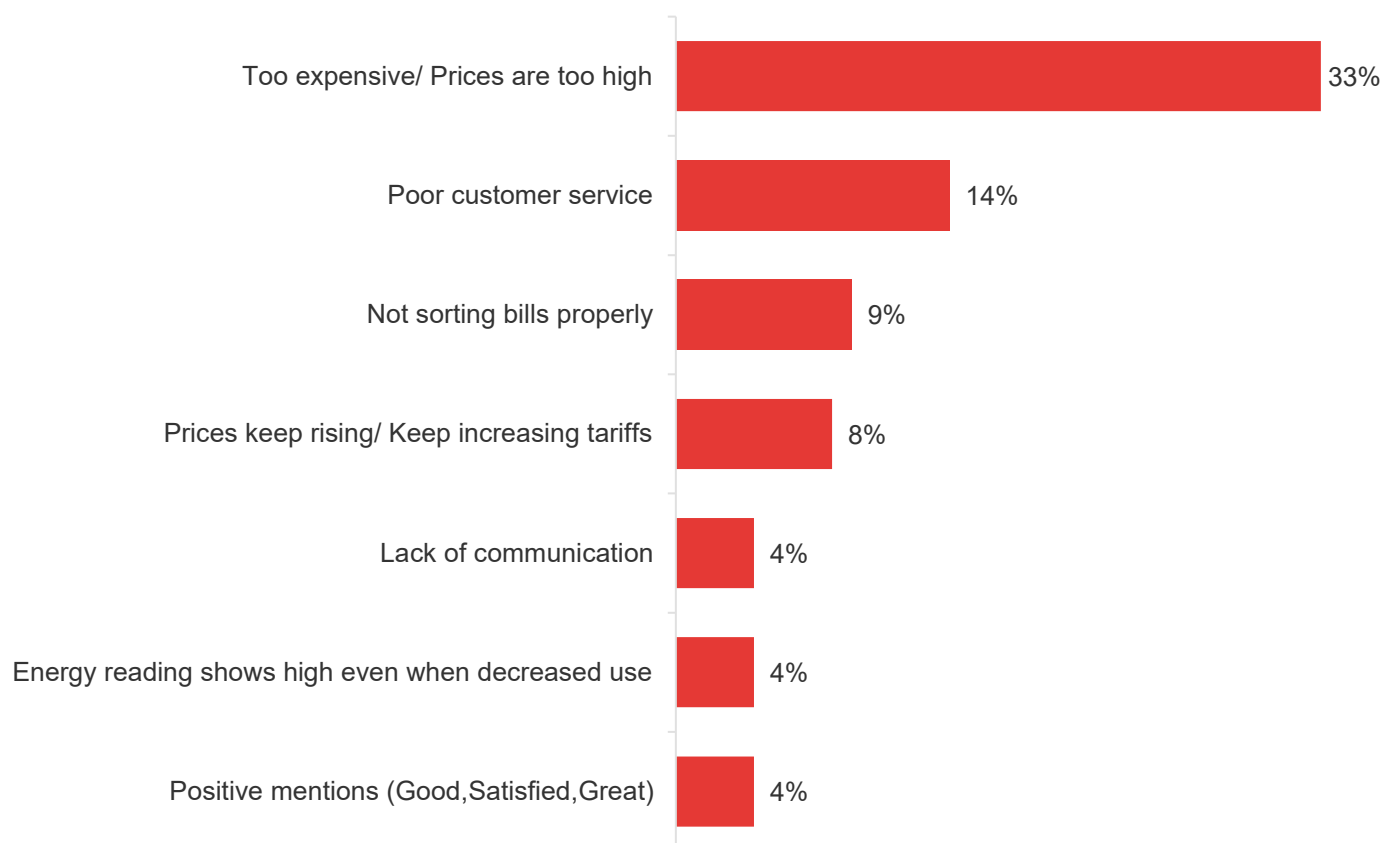
A6: [CODED] Why are you neither satisfied nor dissatisfied with [supplier] as your supplier of <FUEL TYPE>? Base: Neither (422). Top 5 reasons shown (where responses recorded the same percentage we have shown all codes with the equivalent percentage)

Reasons for dissatisfaction

Among the 6% who said they were dissatisfied with their supplier, high prices remain a key reason for dissatisfaction. The top reason cited was that prices were too expensive (33%) and a further 8% said their prices or tariffs keep rising.

However, supplier-controlled factors are also at play, including poor customer service (14%), the supplier not sorting their bills properly (9%) and a lack of communication (4%).

Figure 5: Reasons for dissatisfaction



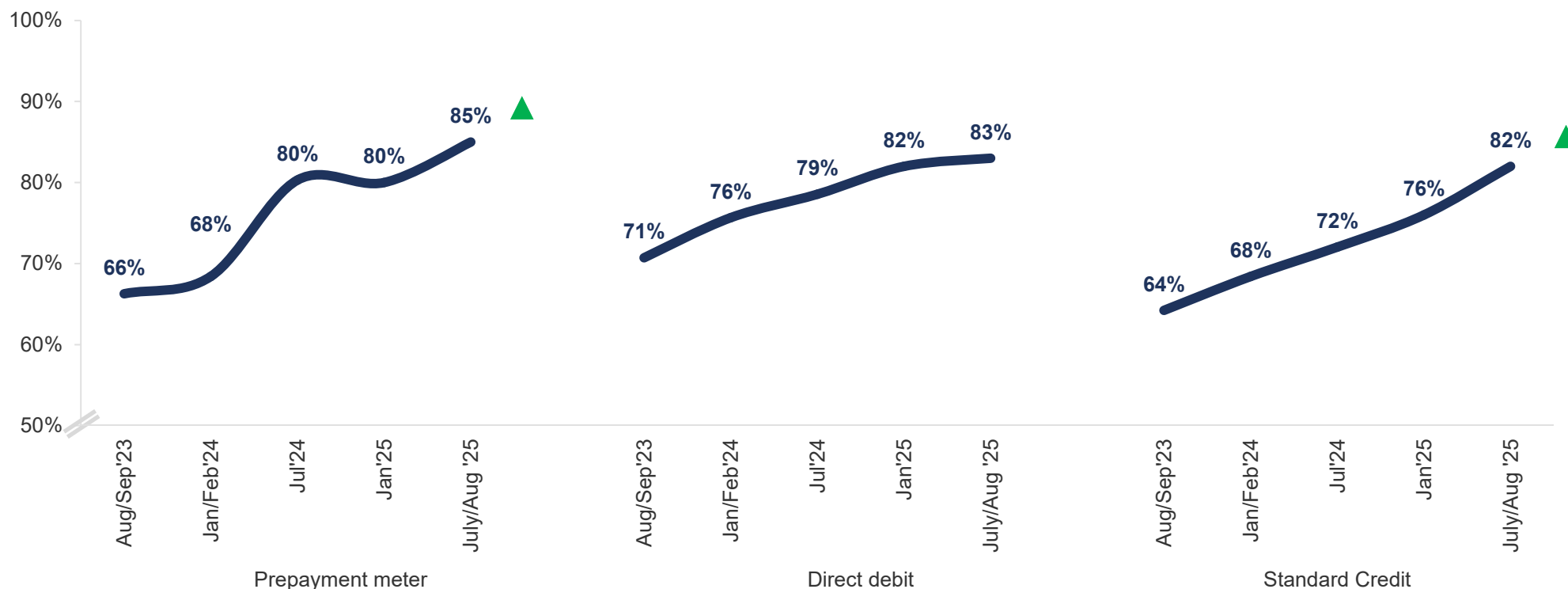
A6: [CODED] Why are you dissatisfied with [supplier] as your supplier of <FUEL TYPE>? Base: Dissatisfied (214). Top 5 reasons shown (where responses recorded the same percentage we have shown all codes with the equivalent percentage).

Satisfaction by payment type

When considering how overall satisfaction differs by payment type, in July/August 2025, all three payment types recorded a similar level of satisfaction.

A few waves ago in January 2024, the gap in satisfaction between direct debit and the other two payment types was more apparent, however the gap has now closed. The closing of this gap has been driven by a more rapid increase in satisfaction among prepayment customers and standard credit customers – both payment types recorded jumps this wave compared to January 2025.

Figure 6: Overall satisfaction by payment type over time (% satisfied)



A5: Overall, how satisfied or dissatisfied are you with [supplier] as your supplier of <FUEL TYPE>? Base: Pre-payment meter (Jul/Aug'25: 742, Jan'25: 725; Jul'24: 699; Jan/Feb'24: 634; Aug/Sep'23: 778), Direct debit (Jul/Aug'25: 2,548, Jan'25: 2,610; Jul'24: 2,488; Jan/Feb'24: 2,732; Aug/Sep'23: 2,467), Standard credit (Jul/Aug'25: 643, Jan'25: 631; Jul'24: 649; Jan/Feb'24: 560; Aug/Sep'23: 585). Significance is marked versus the previous wave only

Financial pressures and value for money

Financial pressures

Overview of findings

- **Reported financial pressures have eased:** there has been a consistent increase in the proportion reporting they are 'doing well' in this survey's financial vulnerability classification. There is also a long-term decline in those classified as 'getting by', financially vulnerable' and 'highly financially vulnerable'. This could be contributing to the increase in satisfaction, as the key driver analysis shows financial vulnerability classification is a key driver of customer service satisfaction.
- **Financial vulnerability continues to shape satisfaction:** while satisfaction has improved across all four financial vulnerability groups since August/September 2023, vulnerability to cost of living pressures continues to shape satisfaction. The gap between those 'doing well' and those 'highly financially vulnerable' remains wide.

Financial vulnerability classification groups

Many aspects that correlate with overall satisfaction are associated with socio-economic status, particularly indicators of how financially vulnerable a household might be.

To provide a summary metric of a respondent's overall financial circumstances in relation to rising financial pressures, since Aug/Sep'23, BMG have applied their financially vulnerability classification framework to the survey. This framework combines three key financial metrics – saving, debt and unexpected expenses – into classifications of financial vulnerability. These categories are defined as the following:

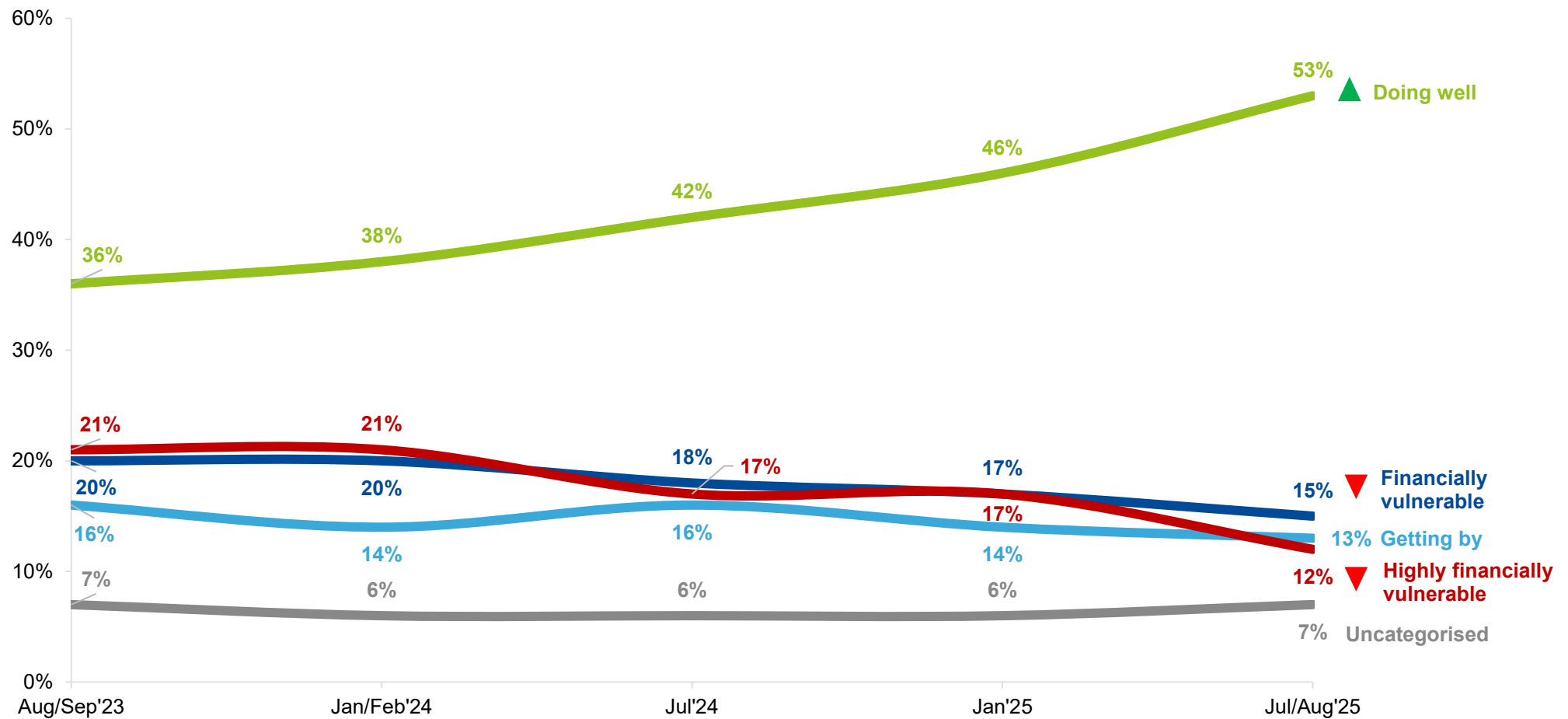
- **'Highly financially vulnerable'** – those not able to save, and who cannot afford an unexpected but necessary expense of £850 and who are borrowing more than usual
- **'Financially vulnerable'** – those not able to save, who either cannot afford an unexpected expense of £850 or are borrowing more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

In each wave around 1 in 5 respondents select 'prefer not to say' for one or more of the classification questions, meaning a sizeable minority are classed as uncategorised. To account for this, a modelling exercise¹⁰ was undertaken ahead of this wave to classify these and other uncategorised respondents in one of the four financial vulnerability groups, with the method retrospectively applied across all waves to ensure the data can be trended reliably. This exercise has meant the number of respondents classed as uncategorised has fallen substantially, at just 7% this wave.

Data from previous waves of the survey show that consumers' financial circumstances continue to improve. The share classified as 'doing well' has risen from 46% in January 2025 to 53% in the latest wave, while the proportions who are 'financially vulnerable' and 'highly financially vulnerable' have declined to 15% and 12% respectively. Around one in ten (13%) remain 'getting by', broadly unchanged since January.

¹⁰ The exercise combined data from previous waves and analysed common characteristics of different subgroups with the uncategorised against key financial indicators. These groups were then assigned accordingly to the financial vulnerability classification group they were most closely aligned with.

Figure 7: Financial vulnerability classification groups over time



Derived variable based on following questions. CL1: In view of the general economic situation, do you think you will be able to save any money in the next 12 months? CL2: Could your household afford to pay an unexpected, but necessary, expense of £850? CL3: Have you had to borrow more money or use more credit than usual in the last month, compared to a year ago? Base: All respondents that did not decline to answer any of the classification questions: July/Aug'25 (3,790), Jan'25 (3,854), Jul'24 (3,750), Jan/Feb'24 (3,855), Aug/Sep'23 (3,742). Significance is marked versus the previous wave only.

Overall satisfaction by financial vulnerability classification groups

Financial vulnerability continues to play a central role in shaping customer satisfaction with energy suppliers. Consistent with previous waves, those 'doing well' financially are most likely to be satisfied overall, with satisfaction holding steady at 88% (significantly higher than the other groups). This is followed by those 'getting by' (83%), those classified as 'financially vulnerable' (73%) and those 'highly financially vulnerable' (71%).

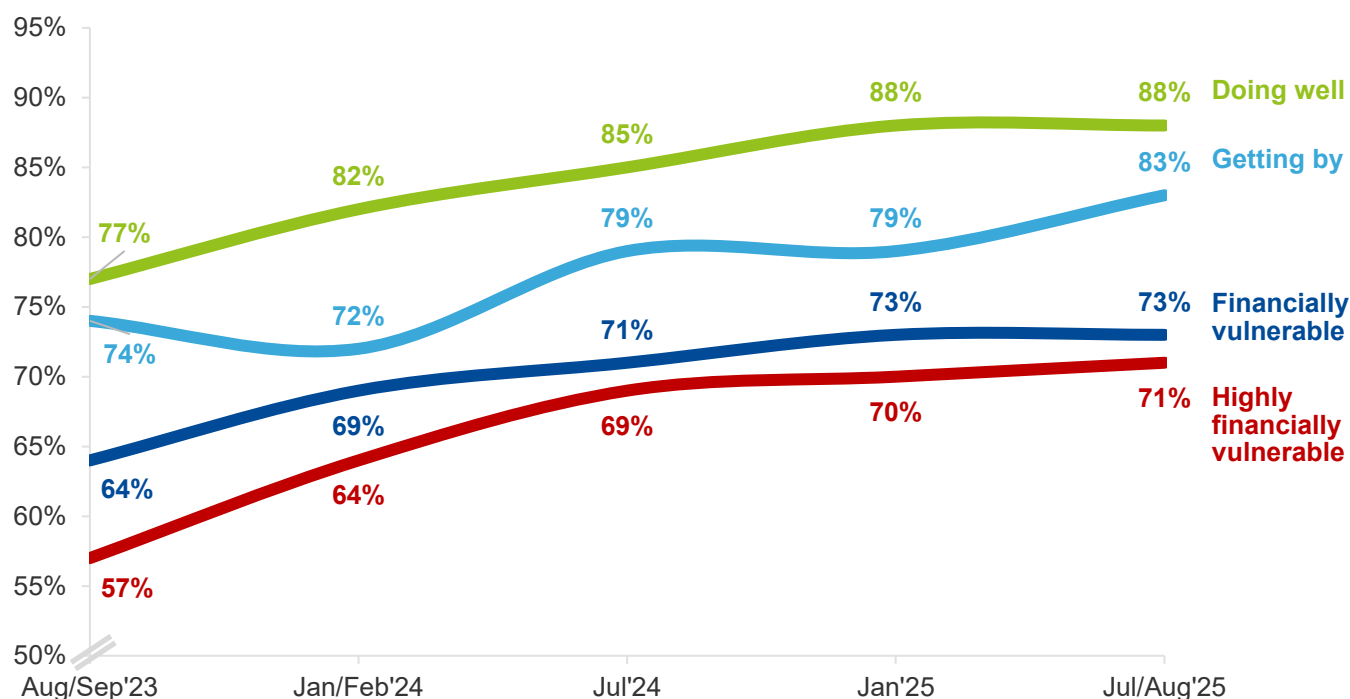
While supplier satisfaction has remained stable compared to January 2025 across all four financial vulnerability classification groups, there has been a longer-term increase since August/September 2023 for each group.

The largest increase in satisfaction since August/September 2023 has been among those classified as 'highly financially vulnerable' (+14 percentage points compared to +9 percentage points for those classified as 'financially vulnerable' and those classified as 'getting by', and +11 percentage points for those classified as 'doing well').

The gap in satisfaction between those 'doing well' financially and those who are 'highly financially vulnerable' has remained relatively consistent since tracking began in August/September 2023. While all groups have seen an increase in satisfaction over time – particularly the 'highly financially vulnerable' group – the difference in percentage points between the highest and lowest satisfaction levels has persisted, indicating a stable disparity in consumer satisfaction across those financial classifications.

When considering reasons for their satisfaction or dissatisfaction, those 'doing well' were less likely to attribute high prices (3%) compared to those 'financially vulnerable' (8%) and 'highly financially vulnerable' (11%).

Figure 8: Overall satisfaction by financial vulnerability measure (% satisfied)



A5: Overall, how satisfied or dissatisfied are you with [supplier] as your supplier of <FUEL TYPE>? Base: Jul/Aug'25
Doing well (1,989), Getting by (480), Financially vulnerable (597), Highly financially vulnerable (481).

After the previous wave in January 2025, Key Driver Analysis was undertaken to explore the relative importance of demographic and energy characteristics in driving overall satisfaction. Taking data from four waves of the Energy Consumer Satisfaction Survey, regression analysis was undertaken on over 15,000 respondents.

Overall, these variables account for just under 12% of the variance in overall satisfaction, with the rest of the variance likely to be explained by different dimensions of customer service and other unobservable factors, for example higher levels of marketing spend by suppliers, or consumer sentiment.

Among the variables analysed in this model, consumers' financial circumstances emerged as the most influential factor in determining overall satisfaction, followed closely by their energy supplier. This indicates that financial wellbeing plays a more important role in shaping satisfaction than supplier choice itself, underscoring the limitations of relying solely on market competition to enhance consumer experiences.

The increase in the proportion of consumers 'doing well' financially this wave is likely contributing to the uplift in satisfaction, although other factors are also at play – explored in more detail later in the report.

Value for money

Overview of findings

- **Satisfaction with value for money offered by supplier has improved this wave, now at 71% (up from 65% in January 2025):** this remains lower than the proportion satisfied overall (82%), which indicates that some customers were satisfied overall despite not being satisfied with value for money offered by their supplier.

Value for money rating

Asked for the first time in January 2025, there has been an increase in satisfaction with value for money from 65% to 71% in the latest wave, driven by an increase in those very satisfied (from 24% to 30%), and a corresponding decrease in levels of dissatisfaction, from 11% to 9%.

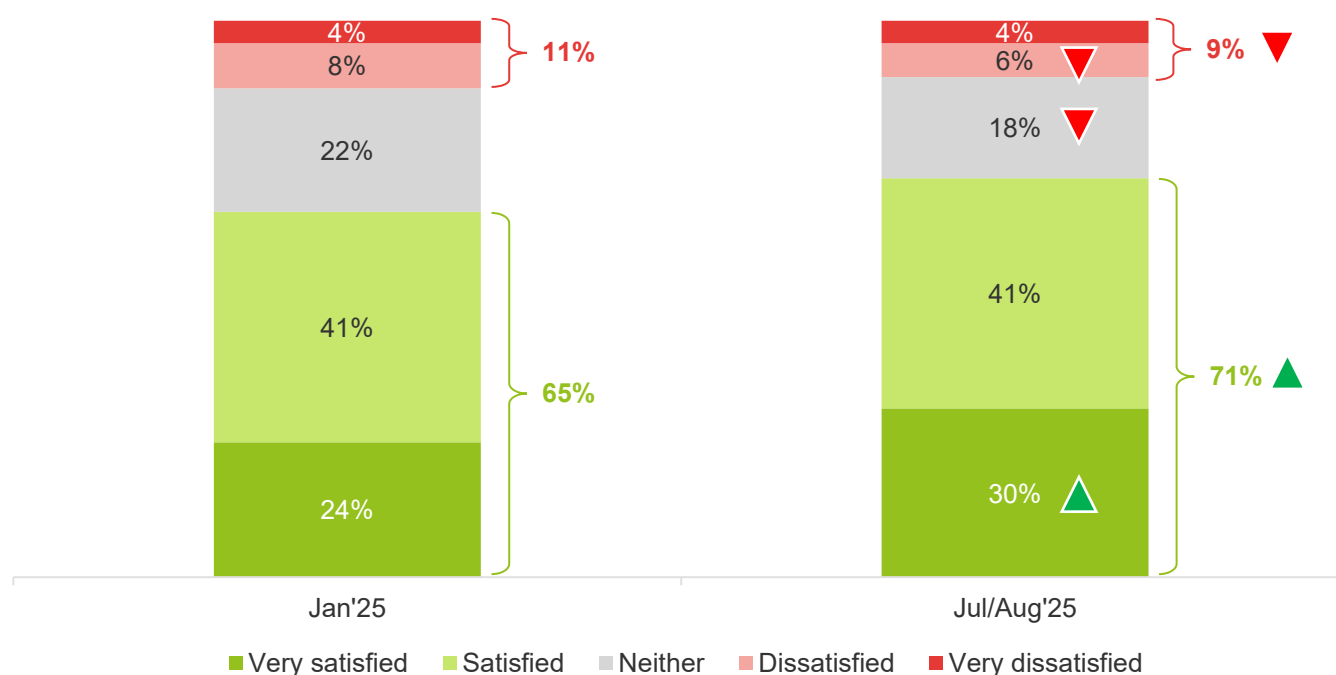
As a result, the gap between satisfaction with value for money and overall satisfaction (at 82%) has narrowed – from 16 percentage points in January 2025 to 11 percentage points in the latest wave.

However, a gap remains, indicating that some customers may be generally satisfied with their supplier, but not necessarily with the value they are receiving. This could reflect passive satisfaction (where customers feel things are fine even if they do not perceive strong value for money) or suggest that other factors beyond price are influencing overall satisfaction.

Satisfaction with value for money also varies by financial vulnerability. Those in the 'doing well' category are more likely to be satisfied (79%), while those in the 'financially vulnerable' and 'highly financially vulnerable' groups are less likely to be satisfied (59% and 58% respectively), highlighting a clear relationship between financial vulnerability and perceptions of value.



Figure 9: Satisfaction with value for money offered by supplier



A8B: How satisfied or dissatisfied are you with the value for money [supplier] provides? Base: All respondents Jul/Aug'25 (3,790), Jan'25 (3,854). Unsure (1%) and prefer not to say (0%) not shown here.

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

Overall customer service experience

Overview of findings

- **Satisfaction with customer service has reached an all-time high:** as with overall satisfaction, satisfaction with customer service has continued to improve from 74% to 76%, the highest score since tracking began.
- **Customer service satisfaction has remained stable across all financial vulnerability groups:** those classified as 'doing well' financially continue to be the most satisfied, while the 'getting by' and 'highly financially vulnerable' groups have seen the biggest increase since the previous wave. Over the long-term, the 'highly financially vulnerable' group have experienced the most significant improvements.
- **Satisfaction for customers using a pre-payment meter or standard credit has improved:** increases in overall satisfaction with customer service among those who pay by pre-payment meter and standard credit mean that satisfaction is now lowest among direct debit customers (for whom satisfaction has remained in line with the previous wave).

Satisfaction with customer service

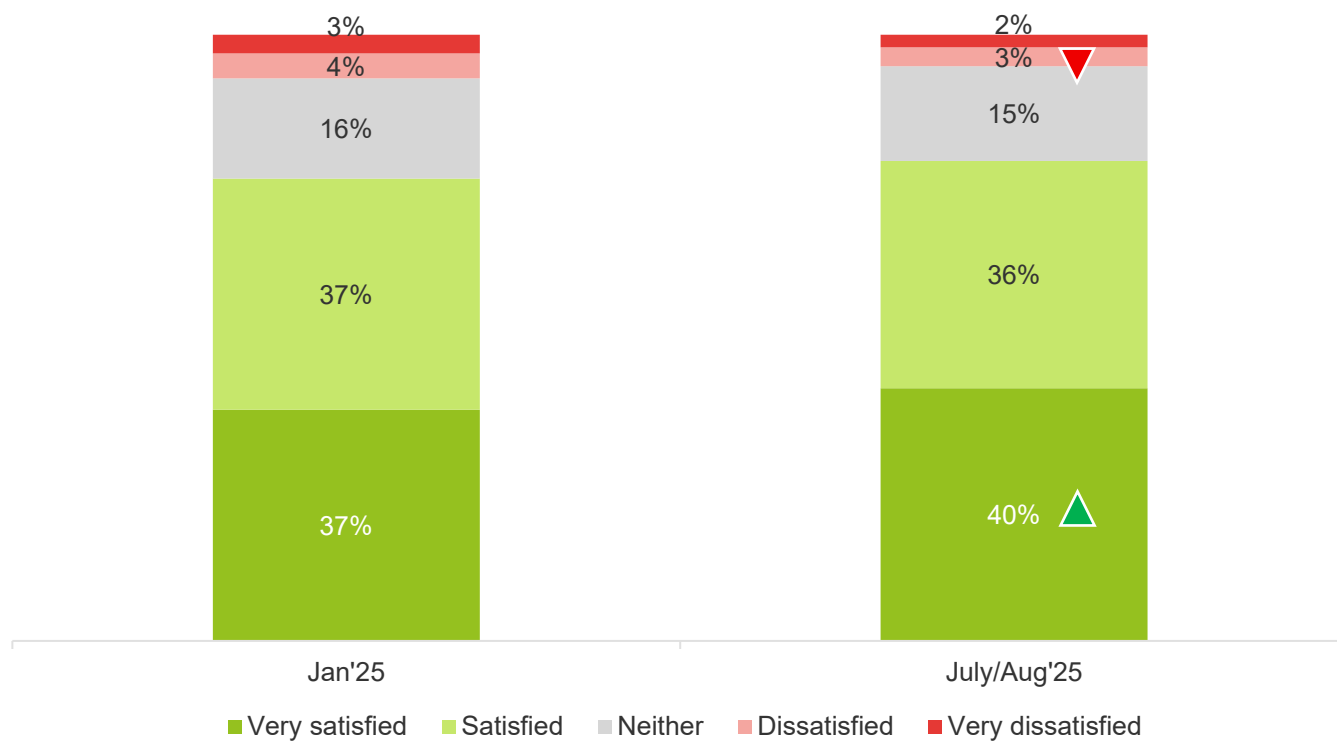
In line with overall supplier satisfaction, there has been an increase in the proportion who are very satisfied with the customer service they receive, from 37% in January 2025 to 40% in the latest wave.

Respondents who contacted their supplier in the past 3 months reported significantly higher satisfaction with customer service (86%), than those who had not made contact (72%). This suggests that interactions with suppliers may be positively influencing customer satisfaction.

Moreover, the proportion of those dissatisfied has fallen to 5% from 7% in January 2025, indicating that negative experiences with customer service are declining.

As with overall satisfaction, a number of customers seem to have a generally passive view towards their supplier. For instance, in Jul/Aug'25 more customers attributed being satisfied or neither satisfied nor dissatisfied with their supplier's customer service due to not having any problems or experiencing any issues with them (10% from 8% in January).

Figure 10: Overall satisfaction with customer service

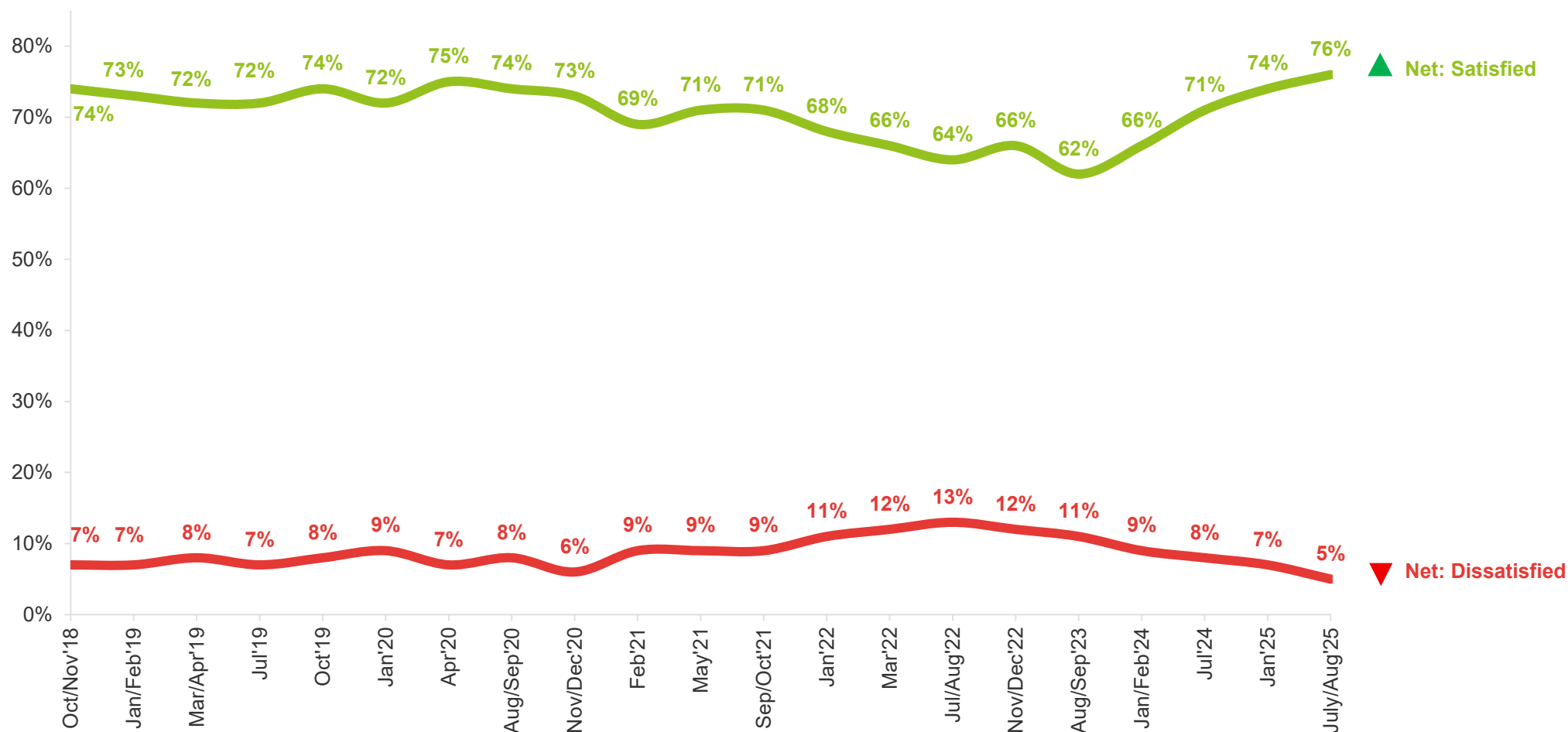


A7. Overall, how satisfied or dissatisfied are you with the customer service you have received from [supplier]? Base: all respondents: Jul/Aug'25 (3,790), Jan'25 (3,854), Jul'24 (3,750). Data labels not shown for values below 3%. Unsure (4%) and prefer not to say (0%) not shown here.



Consequently, as shown in figure 11, overall customer service satisfaction has reached a new peak of 76%, and dissatisfaction has reduced to its lowest level so far, at 5%.

Figure 11: Overall satisfaction with customer service over time



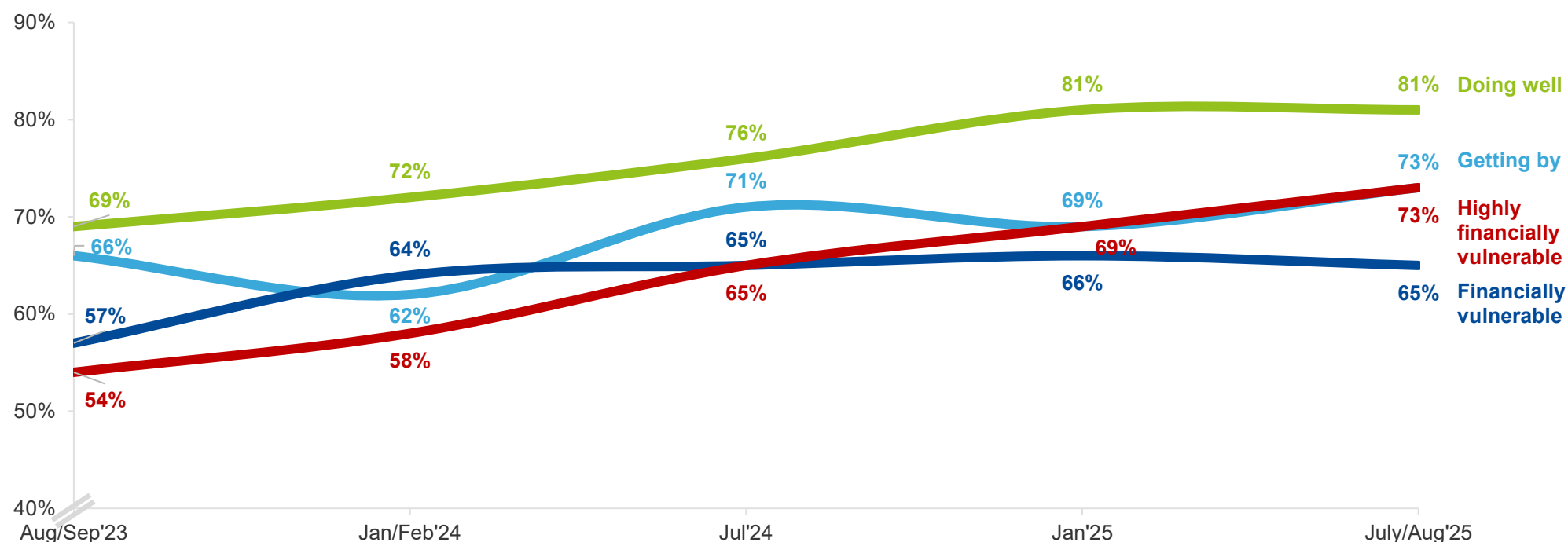
A7. Overall, how satisfied or dissatisfied are you with the customer service you have received from [supplier]. Base: All respondents: Jul/Aug'25 (3,790), Jan'25 (3,854), Jul'24 (3,750). Intervals between surveys vary. Significance is marked versus the previous wave only.

Consistent with previous waves, those 'doing well' financially are the most likely to be satisfied overall (81% – significantly higher than the other groups), followed by those 'getting by' and those 'highly financially vulnerable' (both 73%) and those 'financially vulnerable' (65%).

While customer service satisfaction has remained stable compared to January 2025 across all four financial vulnerability classification groups, there has been a longer-term increase since August/September 2023 for each group, as we saw with overall satisfaction.

The largest increase in customer service satisfaction since August/September 2023 has been among those classified as 'highly financially vulnerable' (+19 percentage points compared to +8 percentage points for those classified as 'financially vulnerable', +7 percentage points for those classified as 'getting by', and +12 percentage points for those classified as 'doing well').

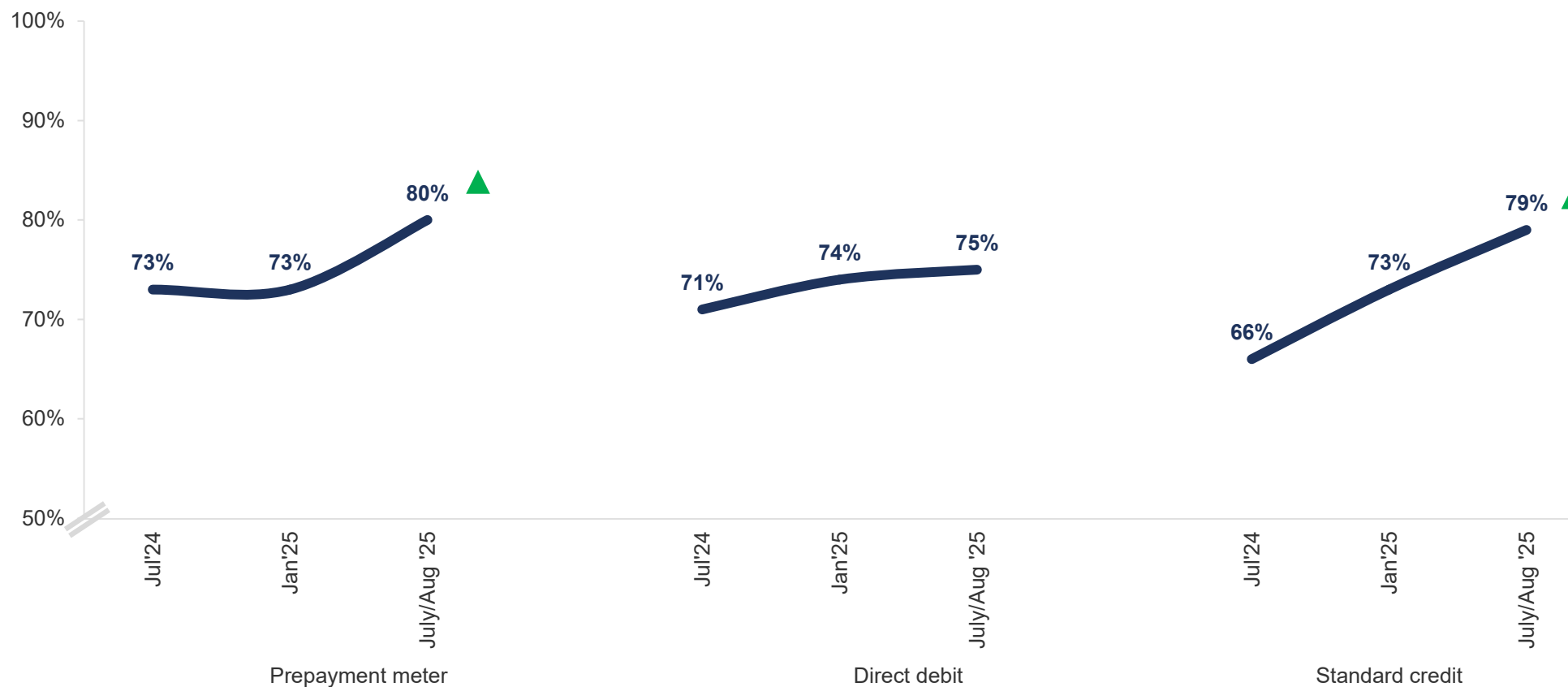
Figure 12: Overall satisfaction with customer service by financial vulnerability measure (% satisfied)



A7. Overall, how satisfied or dissatisfied are you with the customer service you have received from [supplier]? Base: Doing well (1,989), Getting by (480), Financially vulnerable (597), Highly financially vulnerable (481)

Again, as seen with overall satisfaction, satisfaction with customer service has improved for prepayment (73% to 80%) and standard credit (73% to 79%) customers, such that is now higher than the total sample average (76%).

Figure 13: Overall satisfaction with customer service by payment type over time (% satisfied)



A7. Overall, how satisfied or dissatisfied are you with the customer service you have received from [supplier]? Base: Prepayment meter (Jul/Aug'25 = 742, Jan'25 = 725, Jul'24 = 699), Direct Debit (Jul/Aug'25 = 2,548, Jan'25 = 2,610, Jul'24 = 2,488), Standard credit (Jul/Aug'25 = 643, Jan'25 = 631, Jul'24 = 649). Significance is marked versus the previous wave only.

Views on billing

Overview of findings

- **Overall satisfaction with bill accuracy and ease of understanding reached an all-time high:** 82% were satisfied with bill accuracy, and 85% were satisfied with the ease of understanding their bill. Dissatisfaction reached an all-time low for ease of understanding, now at 5%. Asked for the first time in January 2025 wave, 90% were satisfied with when their bill is delivered (i.e. their bills are delivered when they expect them), another improvement from the previous wave.
- **Dissatisfaction with bill understanding and accuracy continues to stem from difficulty in understanding how the total cost is calculated:** the top reason for dissatisfaction with both ease of understanding and accuracy was that it is difficult to understand how the total cost has been calculated.
- **The proportion of customers who report receiving an unexpectedly high bill has decreased:** 24% reported receiving an unexpectedly high bill, down from 26% in the previous wave, although this is still a sizeable proportion of respondents.

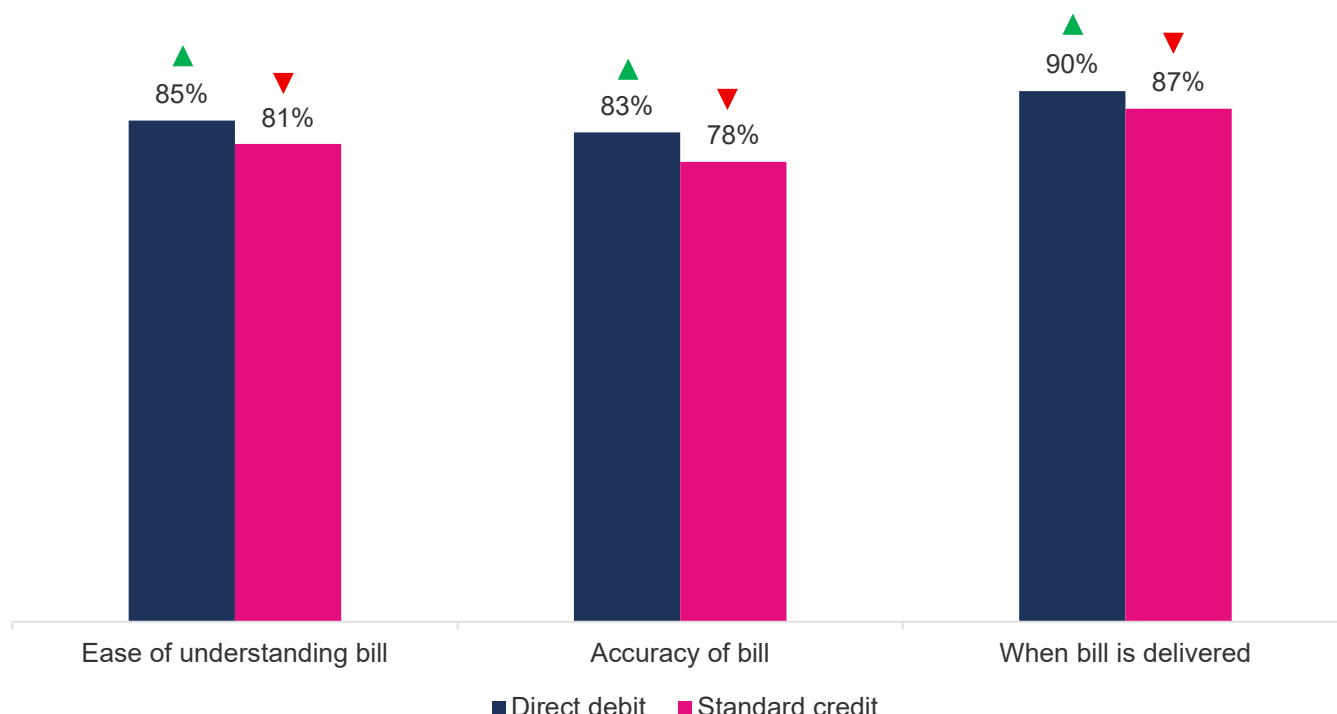
Satisfaction with bill accuracy and ease of understanding

Overall satisfaction with bill accuracy and ease of understanding has continued to increase, reaching all-time highs this wave, at 82% and 85% respectively, with dissatisfaction at all-time lows, both at 5%.

Satisfaction with when the bill is delivered (first asked in the previous wave) has also increased, from 87% in January 2025 to 90% this wave, and dissatisfaction has reduced, from 3% to 2%.

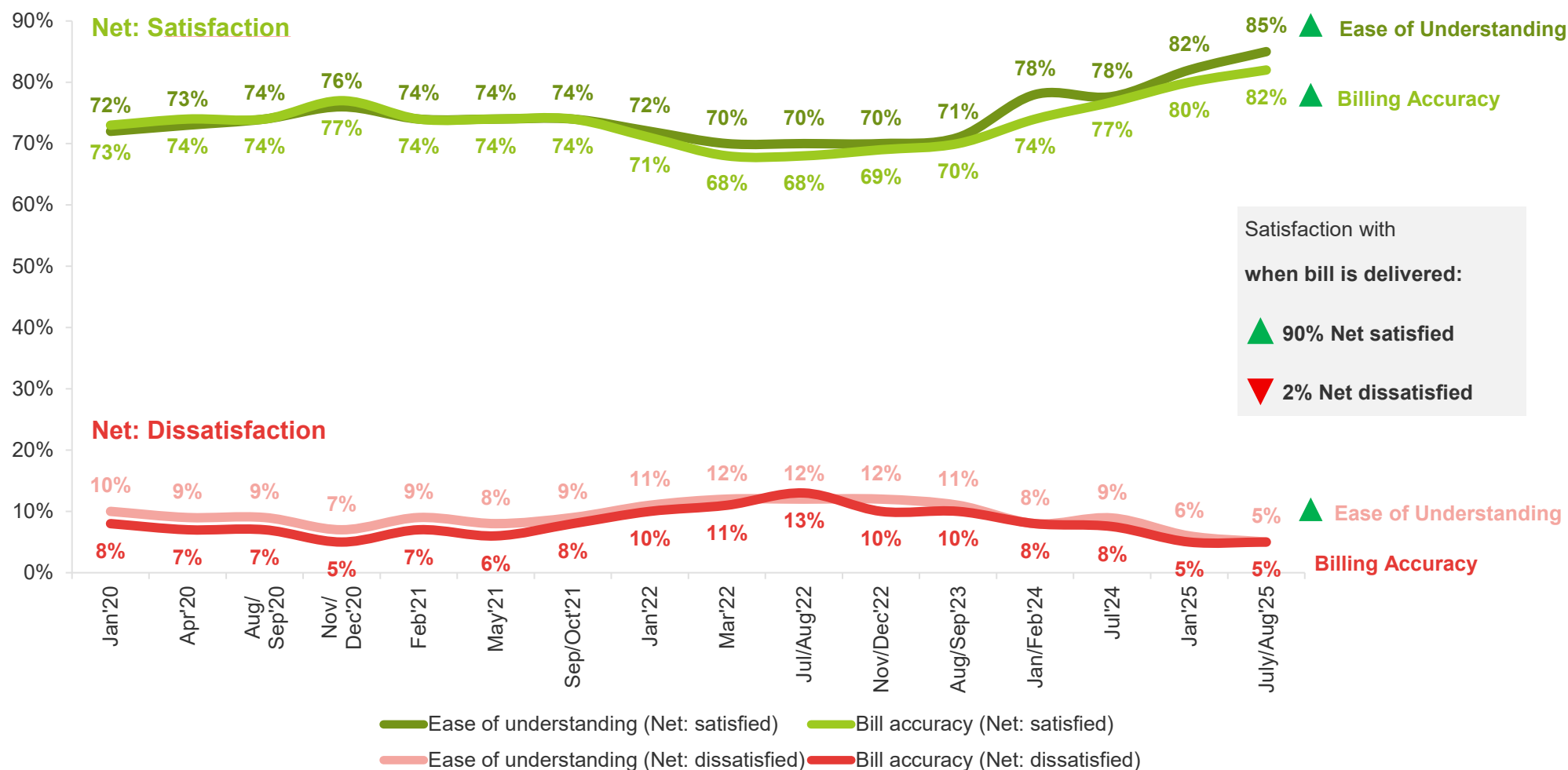
However, customers on standard credit reported lower satisfaction across all three billing metrics compared to the average and those paying by direct debit.

Figure 14: Satisfaction with different aspects of billing by payment type



B8: Please can you tell me how dissatisfied or satisfied you are with the following aspects of [supplier] bills. Base: Direct debit (2,458), Standard credit (643). Significance arrows signify difference between direct debit and standard credit.

Figure 15: Satisfaction with billing accuracy and ease of understanding over time



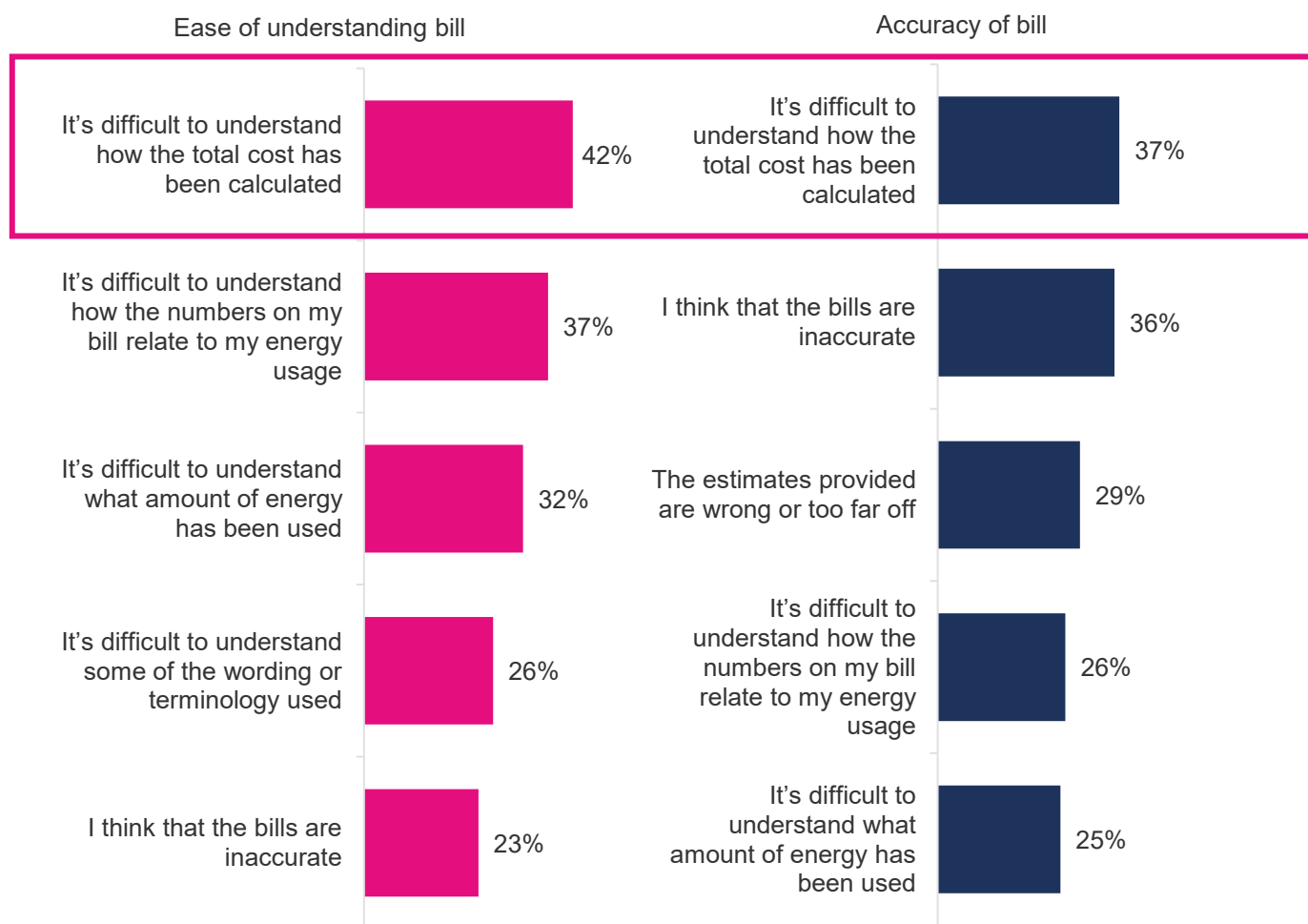
B8. Please can you tell me how dissatisfied or satisfied you are with the following aspects of [supplier] bills. Base: Pays gas/electricity with direct debit or on receipt of bills. Base: Jul/Aug'25 (3,133). Intervals between surveys vary. Significance is marked versus the previous wave only.

Reasons for dissatisfaction with ease of understanding and accuracy of bills

For those who reported dissatisfaction with ease of understanding and accuracy of bills – a reminder that this is only 5% for both – the most common reason for dissatisfaction is the fact that it is difficult to understand how the total cost has been calculated (42% and 37% respectively). This has been the top reason for multiple waves.

Other reasons for dissatisfaction with **ease of understanding bills** include uncertainty on how their bill relates to their energy usage, while other reasons for dissatisfaction with **accuracy of bills** include incorrect estimates on their bill.

Figure 16: Received an unexpectedly high bill in the last 3 months

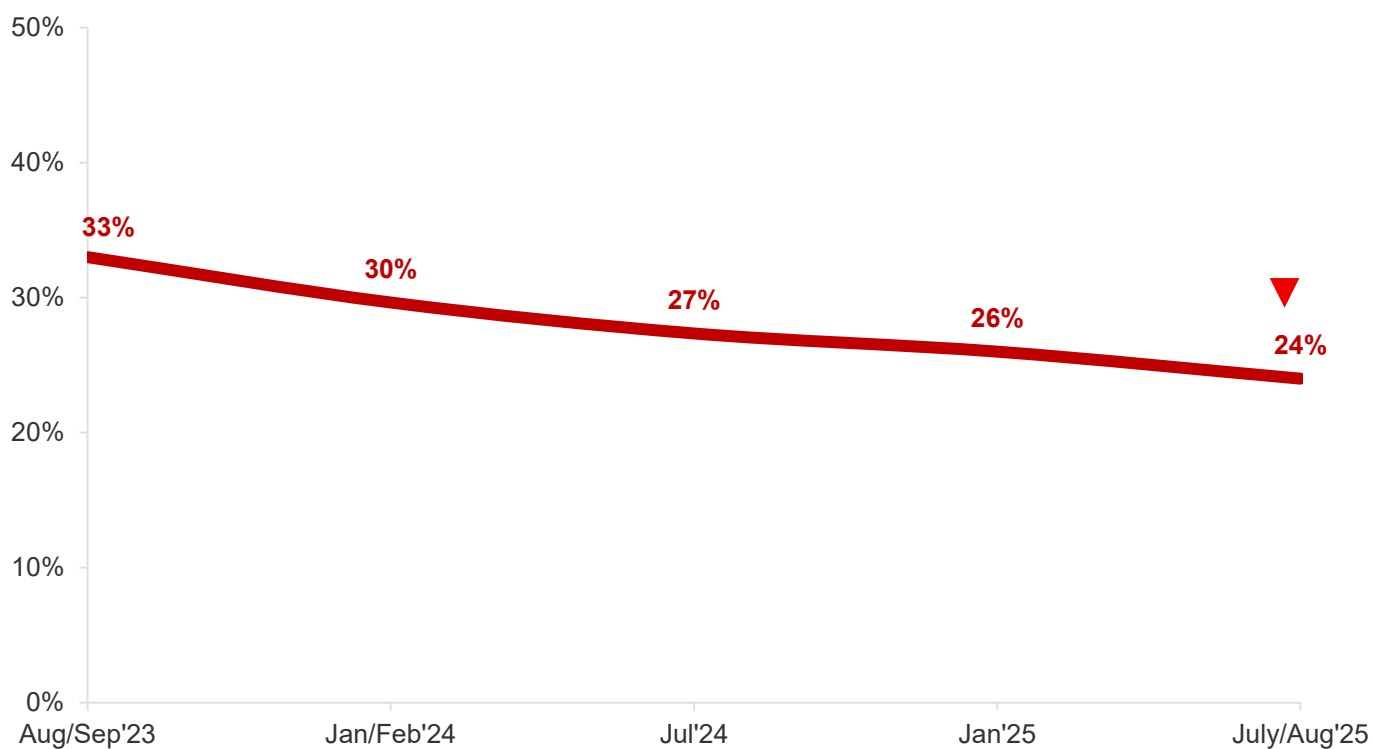


B9: Why are you dissatisfied with the ease of understanding/the accuracy of your bill from your supplier? Base: Dissatisfied with ease of understanding the bill (157), Base: Dissatisfied with accuracy of bill (160)

Experience of unexpectedly high bills in the last three months

Alongside the continued increases in satisfaction with billing accuracy, there has been a further reduction in the proportion of respondents who report receiving an unexpectedly high bill in the last three months, from 26% in January 2025 to 24% this wave, having reduced from 33% in August/September 2023.

Figure 17: Received an unexpectedly high bill in the last 3 months



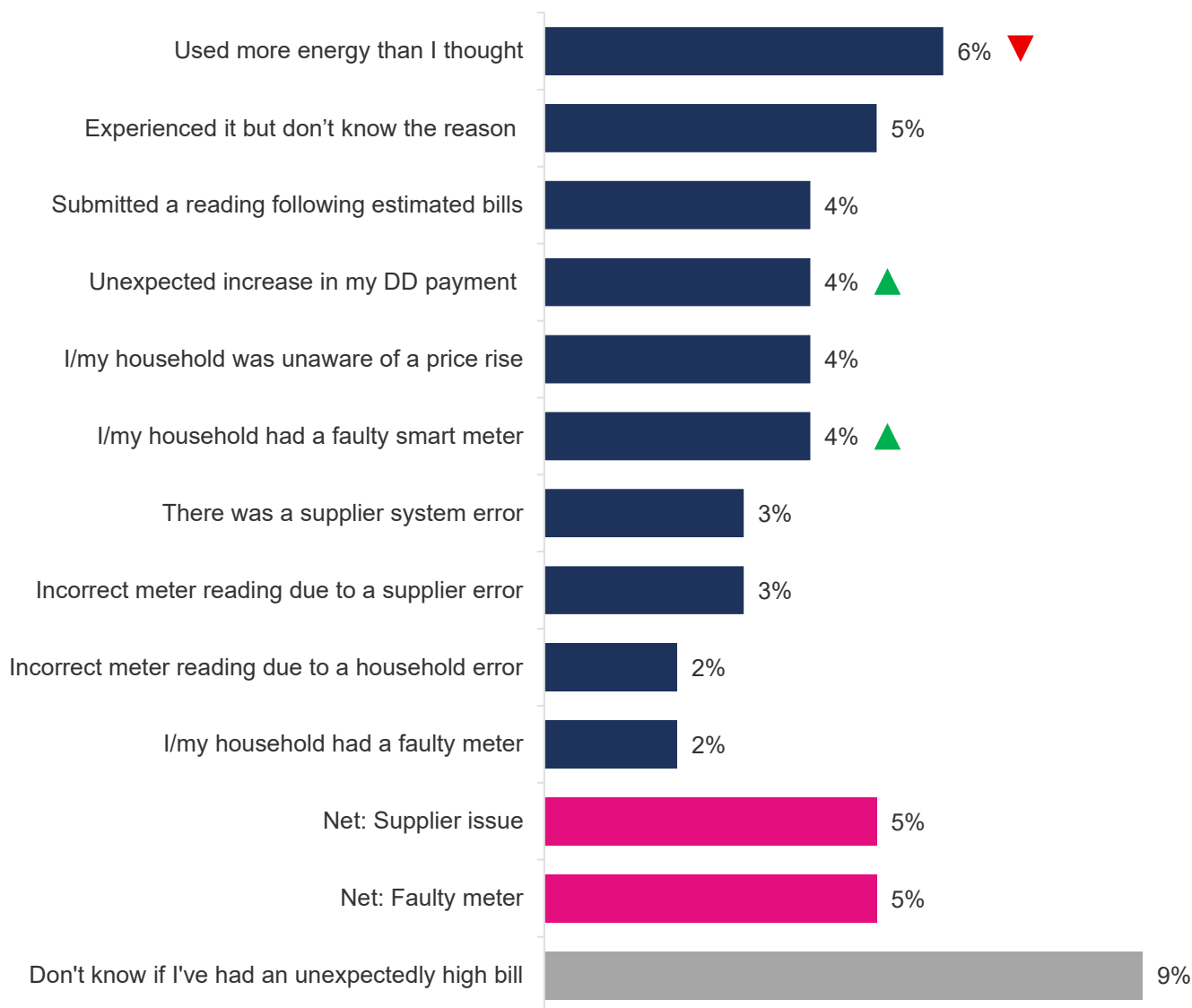
B11. In the last 3 months, have you experienced an unexpectedly high bill due to any of the following reasons? Base: all respondents: July/Aug'25 (3,790), Jan'25 (3,854), Jul'24 (3,750), Jan/Feb'24 (3,855), Aug/Sep'23 (3,742).



Reported reasons for receiving an unexpectedly high bill remain largely in line with the previous wave, with some minor differences. There has been a 2-percentage point reduction to 6% in the proportion of respondents who said that they had received an unexpectedly high bill in the past few months due to using more energy than they thought.

The number of respondents reporting that they received an unexpectedly high bill because of an unexpected increase in their direct debit payments has seen an increase from 3% to 4% in the latest wave, as has the proportion reporting they had a faulty smart meter.

Figure 18: Reported reasons for receiving an unexpectedly high bill



B11: In the last 3 months, have you experienced an unexpectedly high bill due to any of the following reasons? Base: All respondents: Jul/Aug'25 (3,790).

Among payment types, those paying by standard credit (43%) and prepayment meter (33%) are much more likely than the average to have experienced an unexpectedly high bill. In contrast, 20% of direct debit customers reported experiencing an unexpectedly high bill.

Contacting suppliers

Overview of findings

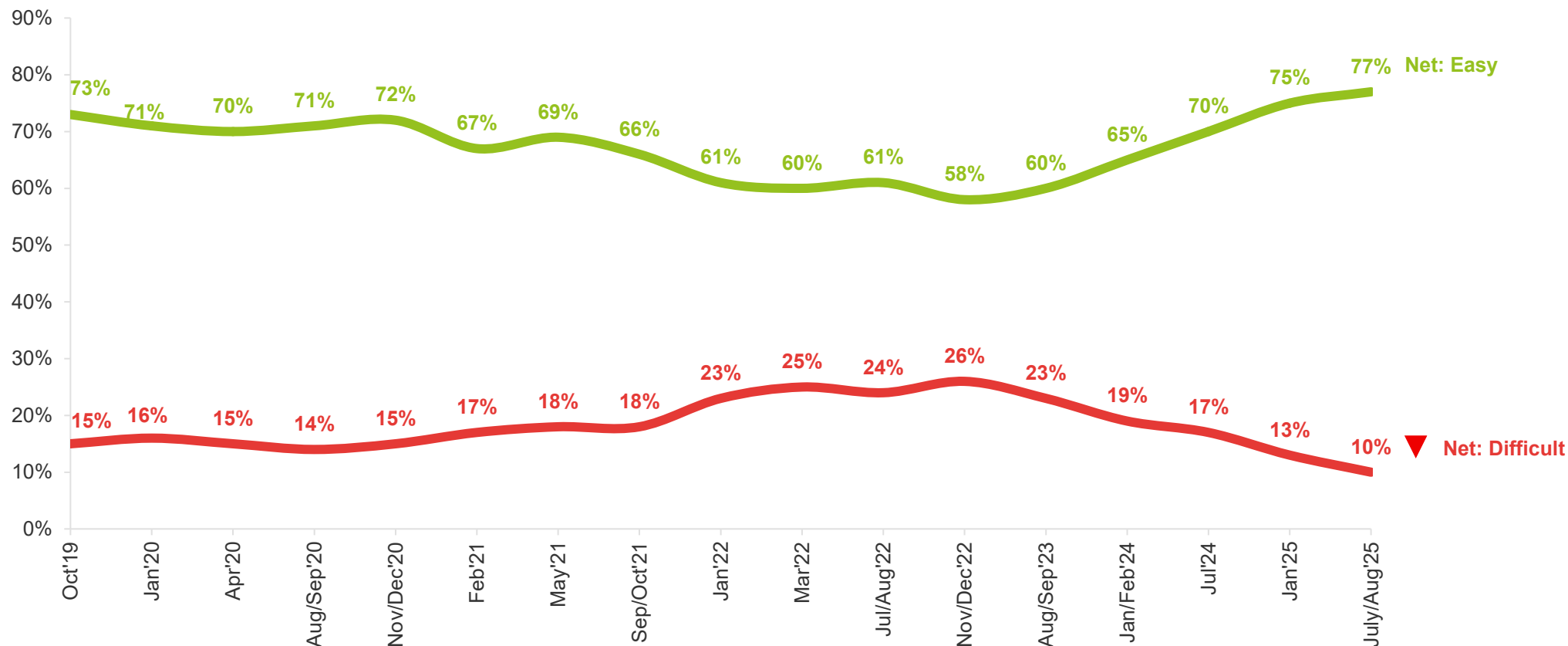
- **Ease of contacting supplier has reached the highest level yet recorded:** 77% of customers who got in contact or tried to contact their supplier reported finding it easy and levels of dissatisfaction are at their lowest yet, at just 10%.
- **Consistent contact rates:** almost one in three (32%) customers had contacted their supplier in the last 3 months, in line with previous waves. For those getting in contact, the most common reasons were to give a meter reading (20%) or to query bills received (15%).
- **Online contact methods are on the rise and use of phone is declining:** while phone remains the most common method of contacting suppliers, this has continued to reduce over time, now at 44%. By contrast, use of live chat channels to contact suppliers has increased to its highest level, from 12% in January 2025 to 16% this wave.
- **Ease of contact has seen long-term improvements for most contact methods:** there have been ongoing increases in reported ease of contact for all methods since August/September 2023. In particular social media, where 91% report contact to be easy in this wave, as compared to 59%.
- **Satisfaction with several aspects of contact has seen improvements but the improvements are starting to slow:** in particular in relation to the time it takes a supplier to respond and the level of empathy or concern shown. However, the rate of improvement is slowing down.
- The proportion of customers experiencing at least one difficulty with making contact is at its lowest level but remains around half: these challenges continue to be driven primarily by long wait times.
- **Issue resolution has continued to improve:** the proportion who reported a lack of resolution of their issue has continued to reduce to 7% in this wave.
- **Views on the range of contact methods available have remained stable:** of those who contacted, or tried to contact their supplier, 81% were satisfied with the range of methods available to do so, in line with 79% in January 2025. 84% agreed that the contact methods available met their needs, in line with 81% in January 2025.



Ease of contacting suppliers

Ease of contacting suppliers has continued to increase to the highest level yet recorded, with 77% of those who had contacted or tried to contact their supplier reporting that it was easy. Similarly, the proportion rating it as difficult to contact their supplier has reached the lowest level yet recorded, now at just 10%. This will be explored in more detail later in the report, with a deeper dive into ease of contact-by-contact channel.

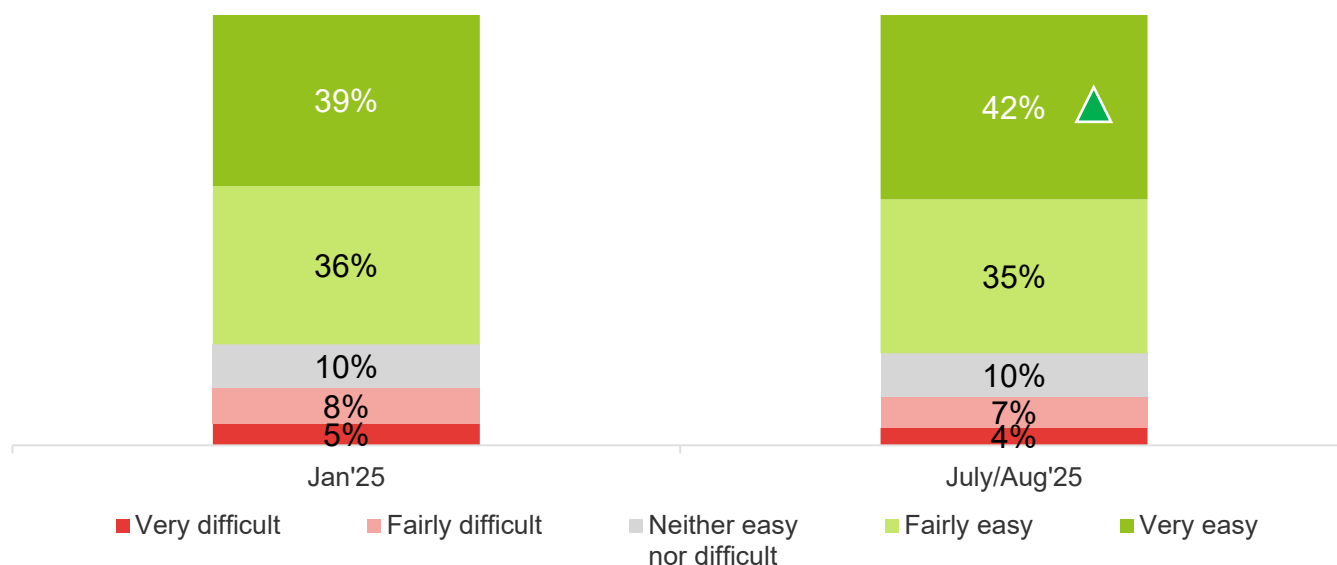
Figure 19: Ease of contacting suppliers over time



E2. Thinking about the last time you tried to contact [supplier] how easy or difficult did you find it to contact them? Base: All those excluding those who have not tried to contact supplier: Jul/Aug'25 (3,175), Jan'25 (3,238), Jul'24 (3,148), Jan/Feb'24 (3,214). Intervals between surveys vary. Significance is marked versus the previous wave only

When looking closer at the comparison between this wave and last wave, the increase in ease of contacting their supplier has been driven by an increase in those reporting it to be very easy, from 39% to 42%.

Figure 20: Ease of contacting suppliers

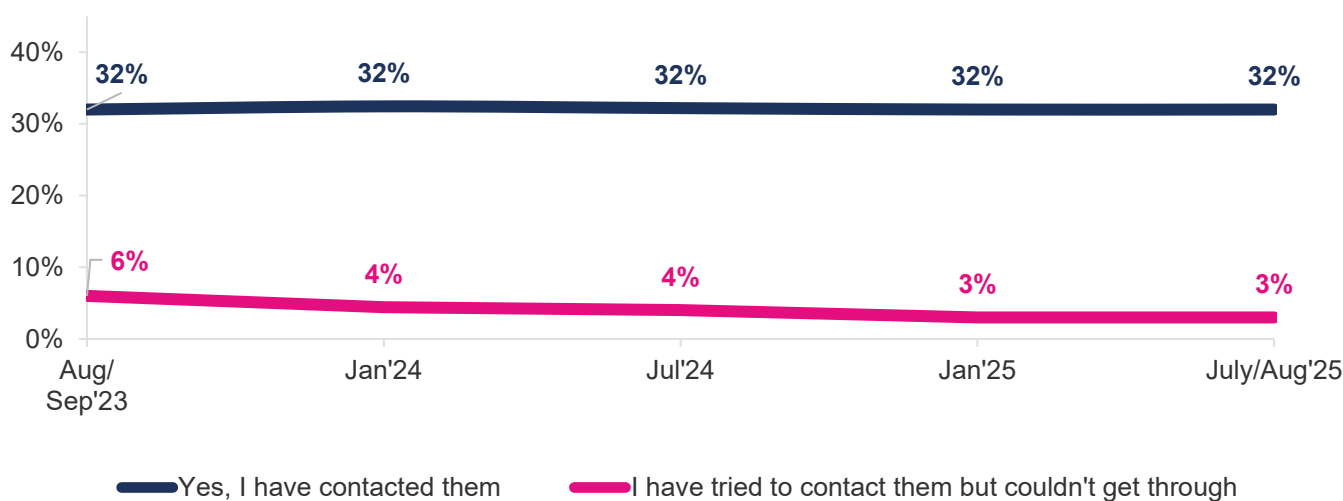


E2. Thinking about the last time you tried to contact [supplier] how easy or difficult did you find it to contact them?
 Base: All those excluding those who have not tried to contact supplier: Jul/Aug'25 (3,175), Jan'25 (3,238). Unsure (2%) and prefer not to say (0%) not shown here.

Contact with suppliers

As has been the case in all waves, around one in three (32%) reported having contacted their supplier in the last three months. A further 3% reported having tried to contact their supplier but been unable to get through, this has decreased from 6% in August/September 2023, reflecting the improvements in ease of contact outlined above.

Figure 21: Contacted or tried to contact



E3. Have you contacted, or tried to contact, [supplier] within the last 3 months? Base: All respondents: July/Aug'25 (3,790), Jan'25 (3,854), Jul'24 (3,750), Jan/Feb'24 (3,855), Aug/Sep'23 (3,742)

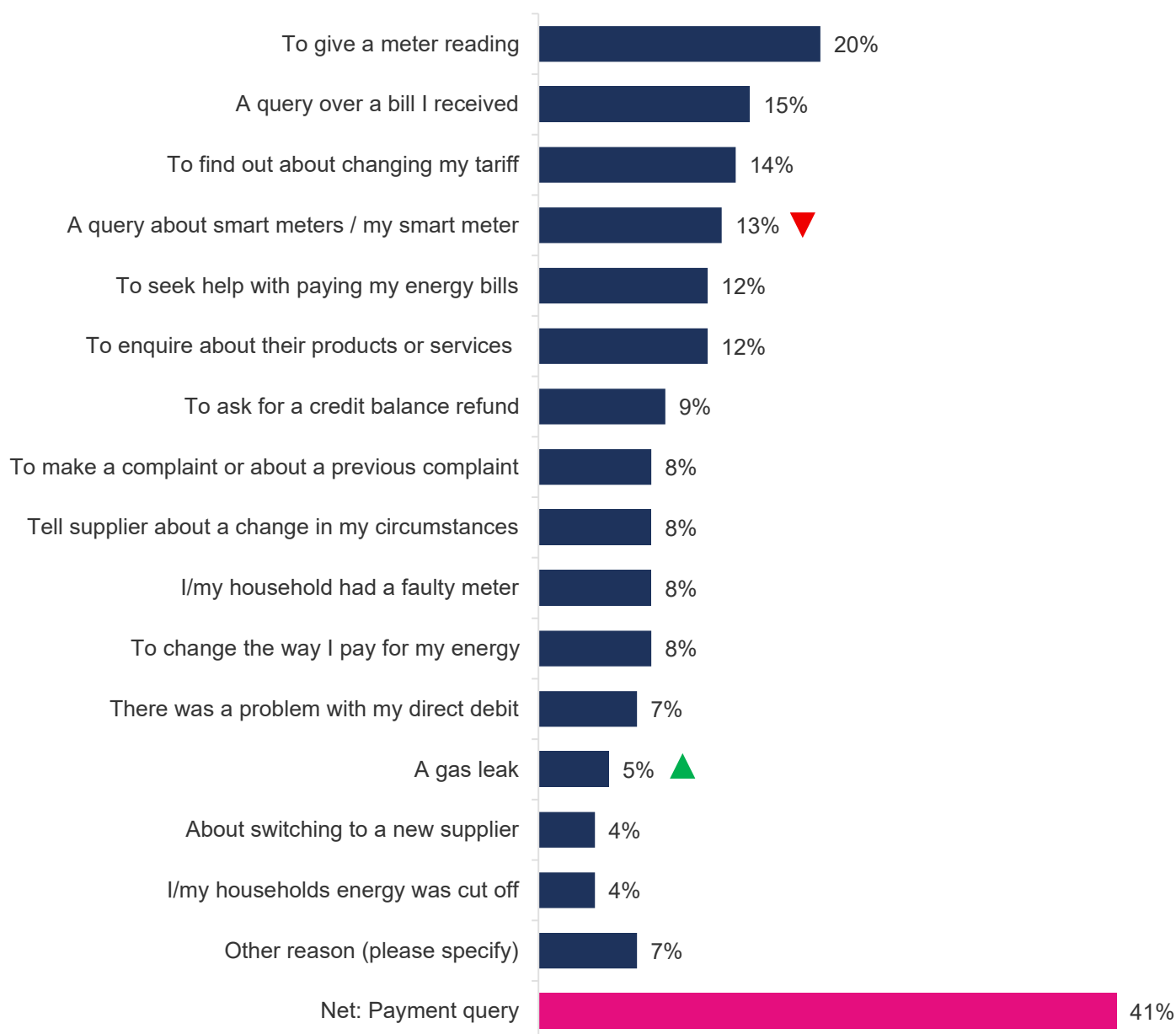
Reasons for contact with suppliers

Among those who had contacted their supplier, the reasons for doing so remain relatively consistent with the previous wave, with the main reasons being to give a meter reading (20%), to query a bill (15%), and to find out about changing tariff (14%). The proportion contacting their supplier with a query about a smart meter has reduced from 16% in January 2025 to 13% in the latest wave.

There has been an increase in the proportion who contacted their supplier about a gas leak, from 3% in January 2025 to 5% in the latest wave.

Overall, the proportion who reported contacting their supplier with a payment query of any sort stands at 41%, in line with January 2025 (40%).

Figure 22: Reasons for contacting supplier

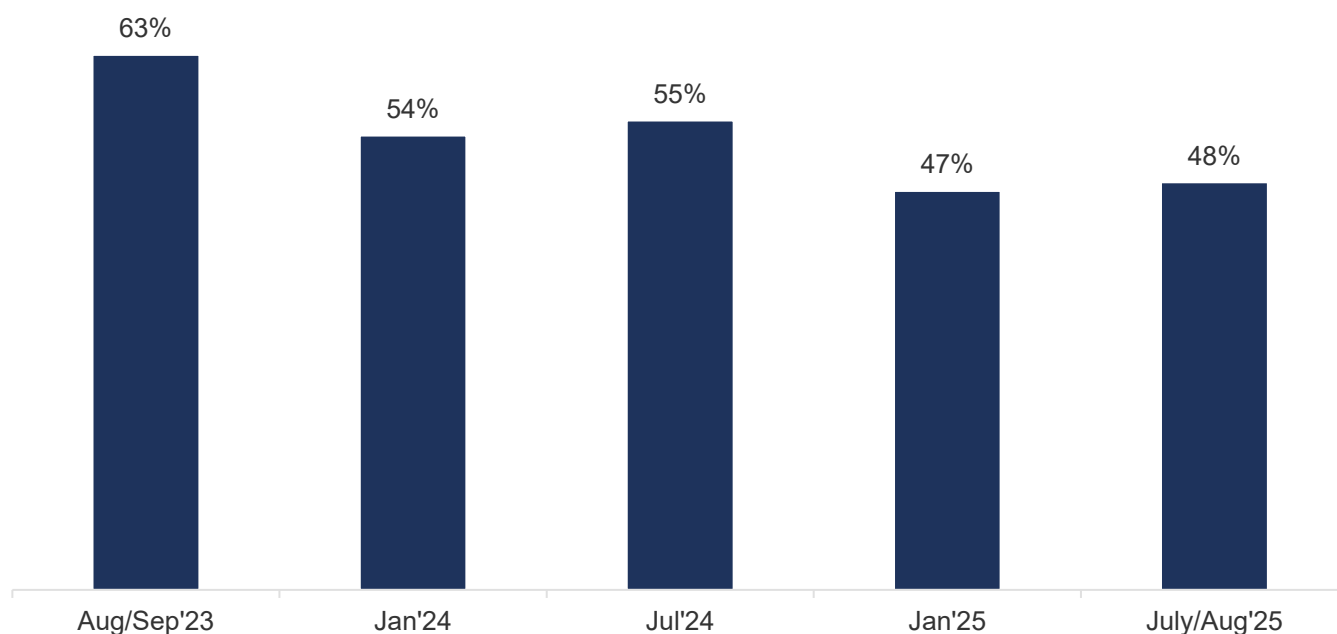


E4. Thinking of the last time you made contact with [supplier], what was it about? Base: All who contacted or tried to contact Jul/Aug'25 (1,401).

Experience of difficulties in contacting supplier

Around half (48%) of respondents who contacted or tried to contact their supplier reported at least one difficulty when doing so. This remains in line with January 2025 (47%) and sustains the drop in difficulty recorded since July 2024 (55%). However, this is still a relatively large proportion of customers experiencing at least one difficulty when contacting suppliers.

Figure 23: Experienced difficulties with contact



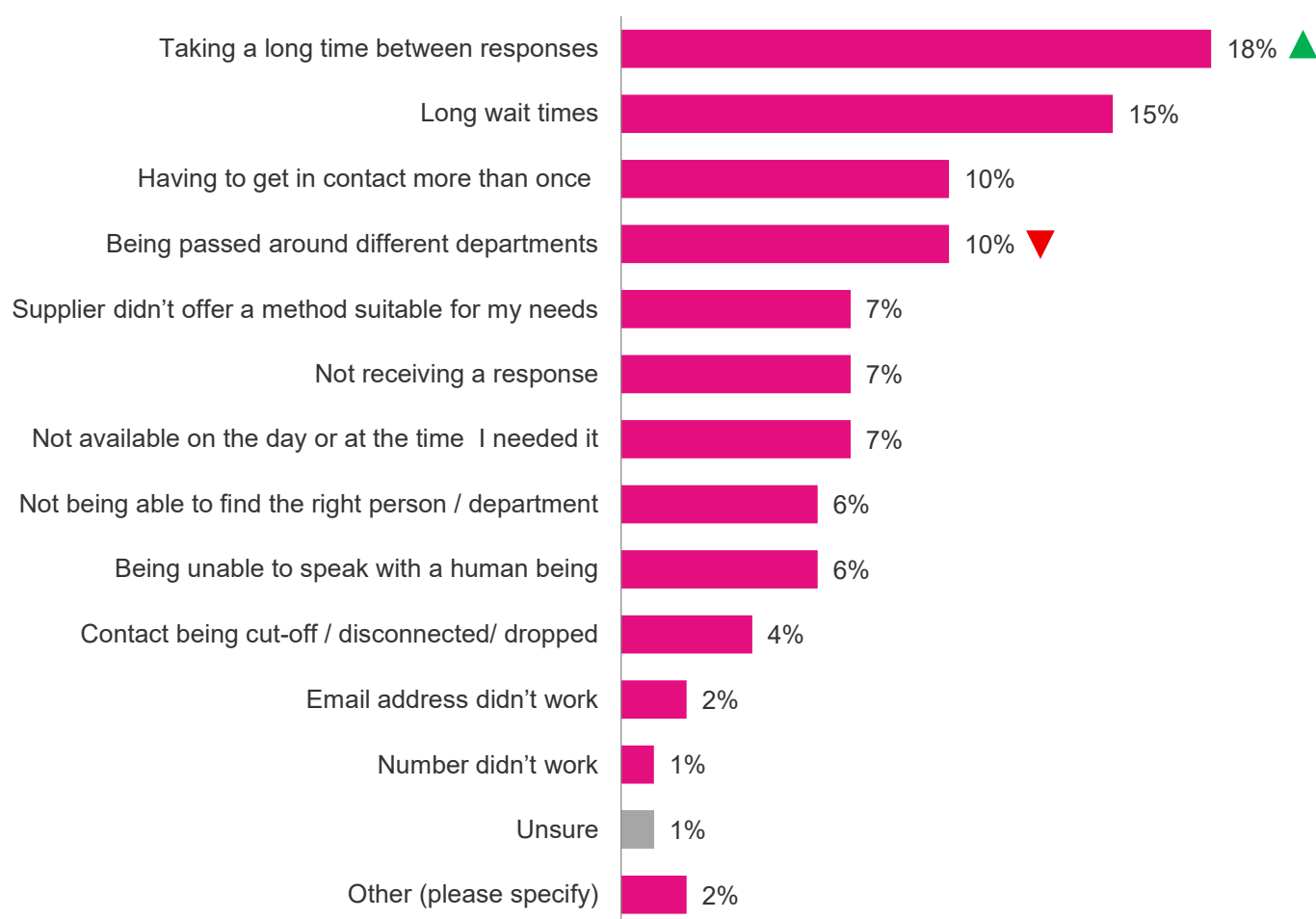
E12. On the most recent occasion you got in touch with [supplier], did you experience any of the following difficulties?
Base: all who contacted or tried to contact: July/Aug'25 (1,401), Jan'25 (1,388), Jul'24 (1,398), Jan/Feb'24 (1,456), Aug/Sep'23 (1,426)

As previously reported, the most common difficulties experienced were suppliers taking a long time between responses (18% this wave, an increase on the 15% reported in January 2025) and long wait times (15%). There has been a reduction in the proportion who reported being passed around different departments from 13% in January 2025 to 10% in the latest wave.

When it comes to long wait times, respondents who contacted their supplier via social media (35%), live chat (27%), and phone (26%) were more likely than average to report this as a difficulty, suggesting these channels may be under pressure or experiencing inefficiencies.



Figure 24: Difficulties experienced with contact



E12. On the most recent occasion you got in touch with [supplier], did you experience any of the following difficulties?
Base: all who contacted or tried to contact: July/Aug'25 (1,401)

Method of contacting supplier

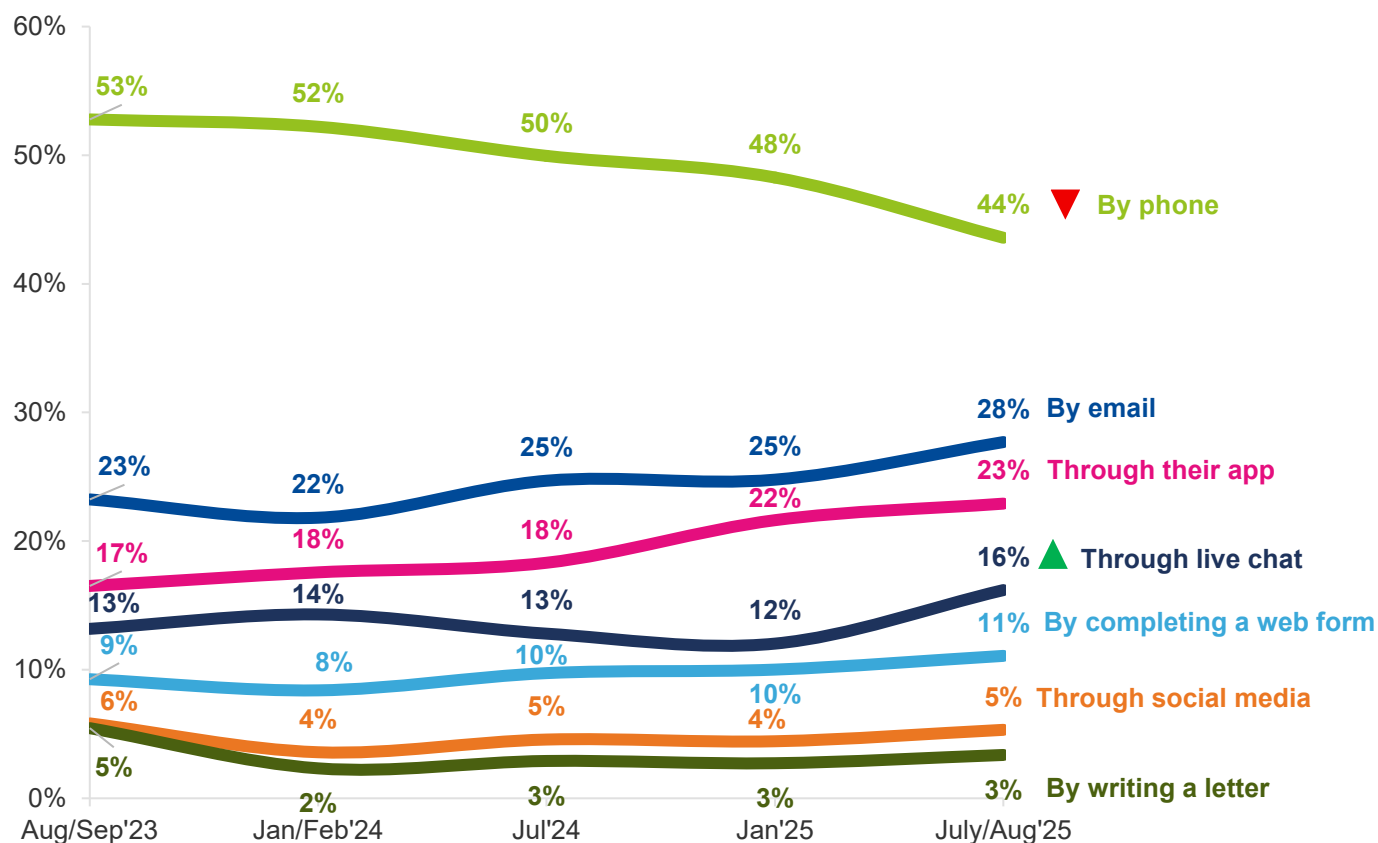
While telephone remains the most common method of contacting suppliers, this has continued to reduce over time, from 53% in August/September 2023 to 48% in January 2025, and, to 44% in the latest wave. By contrast, use of live chat channels like WhatsApp to contact suppliers has increased to its highest level, from 12% in January 2025 to 16% in the latest wave.

There have also been longer term increases in use of other online methods such as email, from 23% in August/September 2023 to 28% in the latest wave, and via apps, from 17% in August/September 2023 to 23% in the latest wave.

Some contact methods are more commonly used for specific reasons than the average:

- 18% who made contact via telephone did so to query a bill (compared to an average of 15% across all contact methods)
- 31% who made contact via social media did so to seek help paying their bills (compared to an average of 12%)
- 16% of those last contacted their supplier by live chat did so to make a complaint (compared to an average of 8%)

Figure 25: Method used to contact supplier



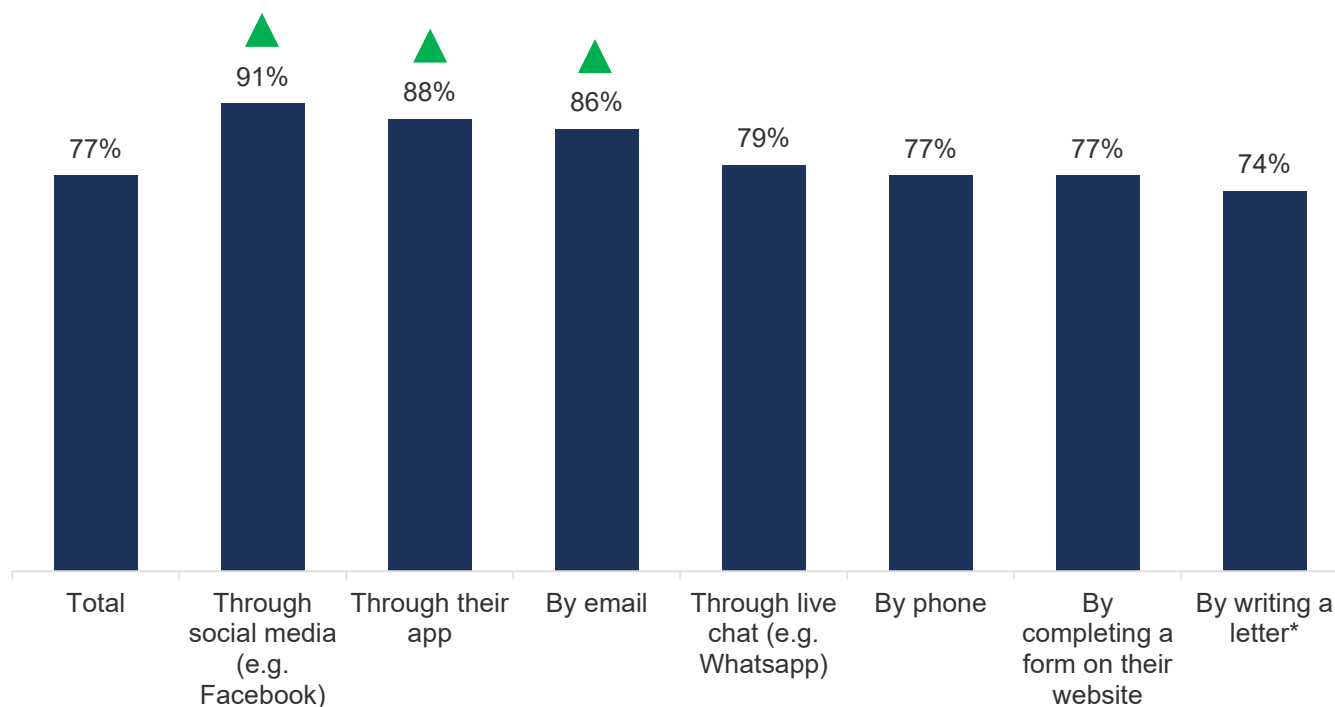
E6. How did you make contact with [supplier] on that last occasion? Base: all who contacted or tried to contact: July/Aug'25 (1,401), Jan'25 (1,388), Jul'24 (1,398), Jan/Feb'24 (1,456), Aug/Sep'23 (1,426)

When comparing ease of contact by method, some of the more digital channels – including those with long-term growth in usage, like through apps and by email – are also rated as easier to use than average. This shows that methods that are growing in popularity are also proving to be the ones that customers find easier to use.

That said, phone contact still plays an important role. While usage has declined, 77% of customers still find it easy to contact their supplier using phone. It also remains a key contact method for customers aged 65+ and digitally excluded customers, who were more likely to use it than average (both at 52%).

Other online contact methods are also rated positively in terms of ease of contact: 88% say it is easy to contact their supplier via their app (compared to 68% in August/September 2023) and 86% that it is easy to contact them via email (compared to 65% in August/September 2023).

Figure 26: Reported contact as easy by contact method (versus total)



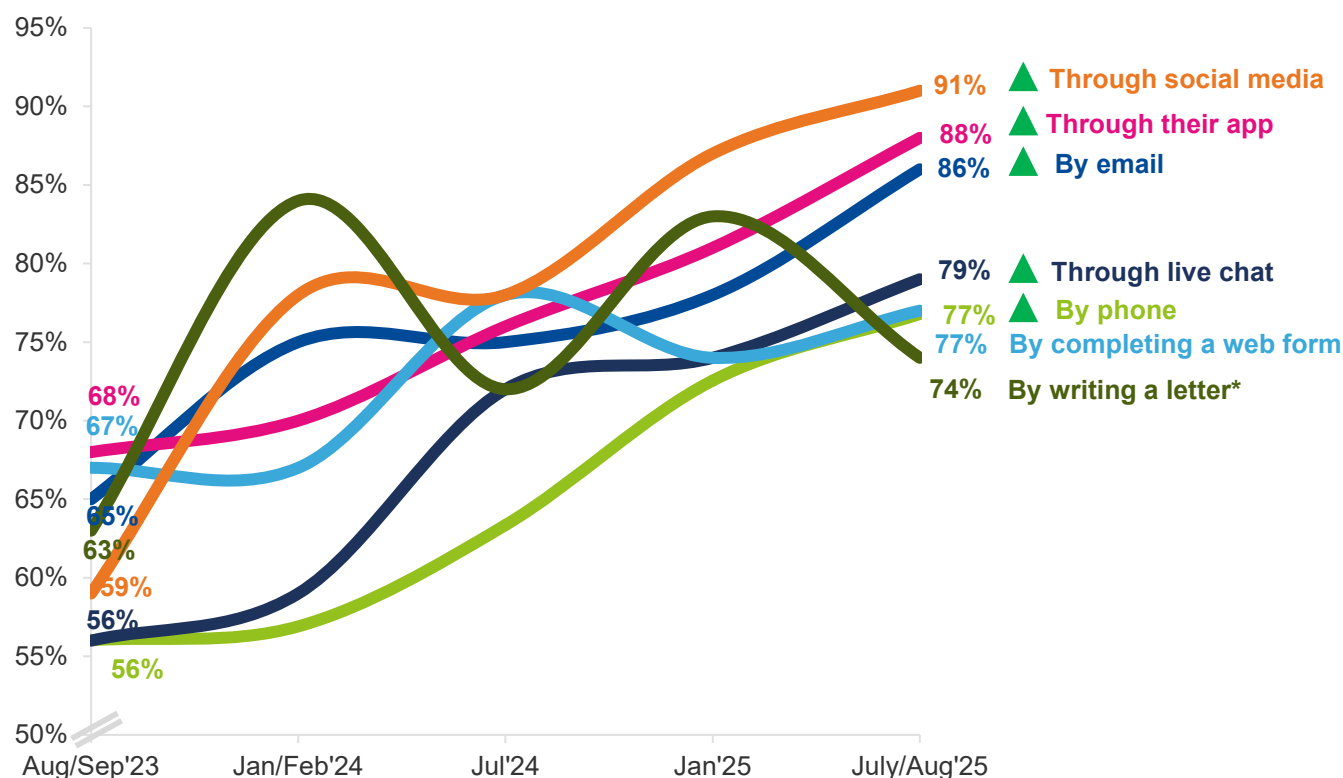
*E2. Thinking about the last time you tried to contact [supplier] how easy or difficult did you find it to contact them? Base: all those excluding those who have not tried to contact supplier, by contact method (3,175) *Low base size of 49. Significance is indicated versus the total.*

There have been ongoing increases in reported ease of contact for all methods since August/September 2023, particularly social media, where 91% report contact to be easy in the latest wave, as compared to 59%, making this the most highly rated channel in terms of ease of contact.

Other online contact methods are also rated particularly positively in terms of ease of contact: 88% say it is easy to contact their supplier via their app (compared to 68% in August/September 2023) and 86% that it is easy to contact them via email (compared to 65%).



Figure 27: Reported contact as easy by contact method



E2. Thinking about the last time you tried to contact [supplier] how easy or difficult did you find it to contact them? Base: all those excluding those who have not tried to contact supplier, by contact method: July/Aug'25 (3,175), Jan'25 (3,238), Jul'24 (3,148), Jan/Feb'24 (3,214), Aug/Sep'23 (3,135). *Caution: low base (49). Significance is marked versus August/September 2023 figures.

Satisfaction with elements of last contact

In the latest wave, there has also been further improvements on a number of measures:

- The time it took for the supplier to respond to your query (from 78% to 83%)
- Ease of making contact with them (from 78% to 83%)
- How well the supplier understood what was needed (from 77% to 81%)
- The level of empathy or concern showed (from 74% to 79%)

These build on improvements recorded in the previous wave.

Looking at the longer-term trend in satisfaction – specifically compared to August/September 2023 – there has been a more significant improvement in aspects of contact. This suggests that the pace of improvement is now slowing, as satisfaction with various elements of contact begins to plateau.

It's also worth noting that the most significant long-term improvements have been related to time, specifically, the time it takes to reach someone and to receive a response. These were top issues raised by customers when getting in contact, but we have seen a large improvement for these aspects over time (both have increased by 20 percentage points since August/September 2023). So, while challenges remain, there's clear progress in some of the areas that matter most to customers.

Figure 28: Satisfaction with elements of last contact (% satisfied)

		Difference from Jan'25	Difference from Aug/Sep'23
The service received through their app	87%	+3%	+14% ▲
The service received through social media	85%	-3%	+12% ▲
The time it took for your supplier to respond to your query	83%	+5% ▲	+20% ▲
Ease of making contact with them	83%	+4% ▲	+18% ▲
The service received by email	83%	+5%	+18% ▲
The service received by phone	82%	+4%	+19% ▲
How the overall interaction was handled	82%	+3%	+17% ▲
The service received by completing a form on their website	82%	+3%	+10% ▲
The service received through live chat	81%	+6%	+19% ▲
How well your supplier understood what you needed	81%	+3% ▲	+16% ▲
Ease of finding the right contact details	81%	+1%	+15% ▲
The level of empathy or concern showed towards you	79%	+5% ▲	+19% ▲
The time it took to reach someone to resolve your query	74%	+3%	+20% ▲

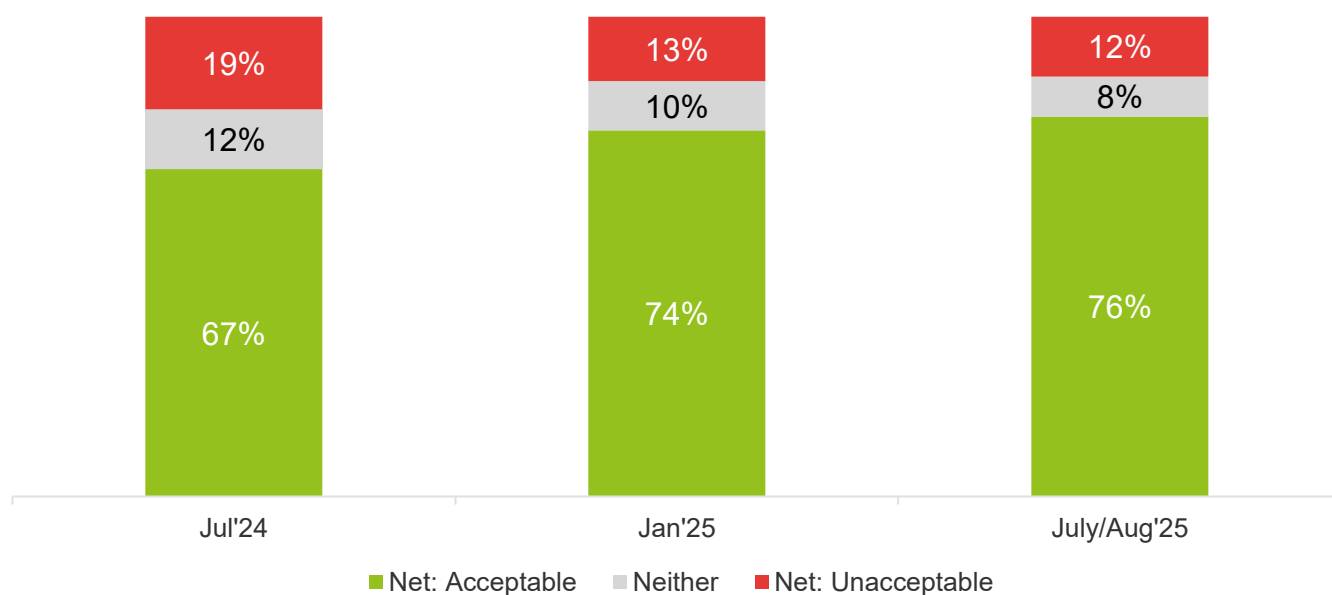
E7. Still thinking about this last contact, please can you tell me how dissatisfied or satisfied you were with the following. Base: floating bases (bases vary depending on the contact with their supplier), all who contacted or tried to contact via a particular method

Overall, three quarters (76%) find the number of times they had to contact their supplier about an issue acceptable, in line with January 2025 (74%), which saw an improvement in July 2024 (67%).

Among customers who contacted their supplier, 29% of those who did so to make a complaint and 15% of those who did so to make a payment query said the number of times they had to get in touch was unacceptable – both higher than the overall average (12%)

Furthermore, those who contacted their supplier about a complaint were more likely to say their query was not resolved (13%) compared to the overall average (7%).

Figure 29: Acceptability of number of contact attempts

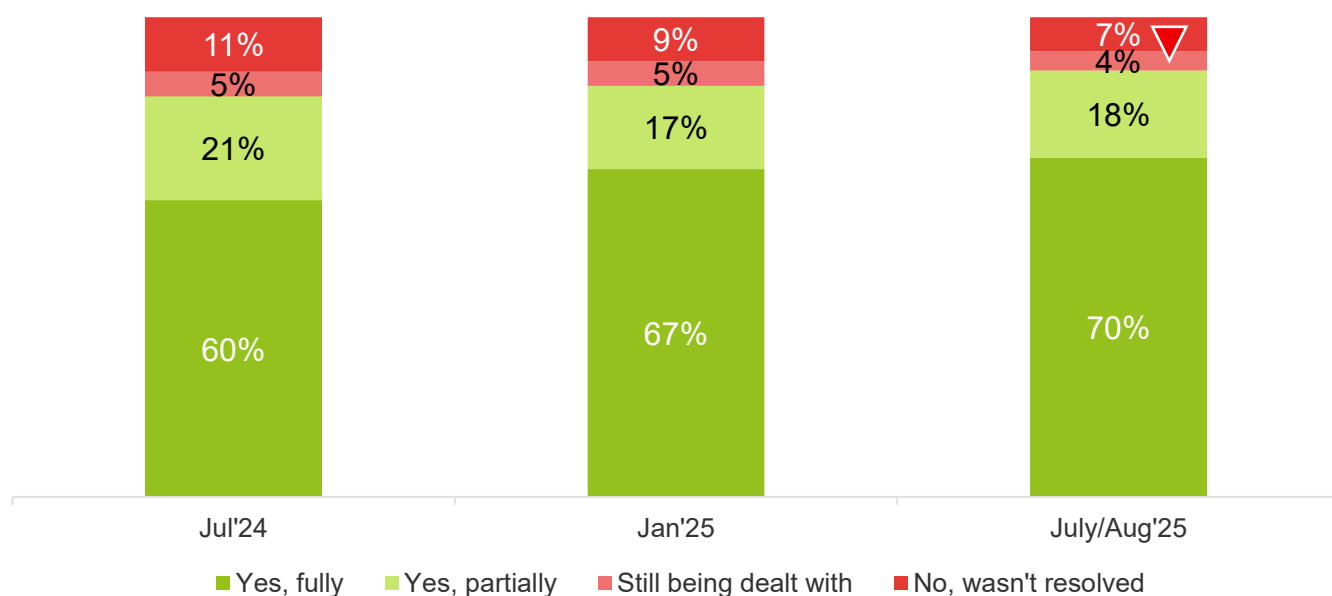


E12A. How acceptable or unacceptable was the number of times you had to get in contact about that given issue? Base: All who contacted or tried to contact: July/Aug'25 (1,401), Jan'25 (1,388), Jul'24 (1,398). Unsure (1%) and not applicable (2%) not shown here.

Issue resolution

The proportion of those contacting or trying to contact their supplier reporting a lack of resolution of their issue has continued to reduce, from 11% in July 2024, to 9% in January 2025, and to 7% in the latest survey. By contrast, the upward trend in those reporting a full resolution has continued, reaching 70% in the latest wave.

Figure 30: Issue resolution

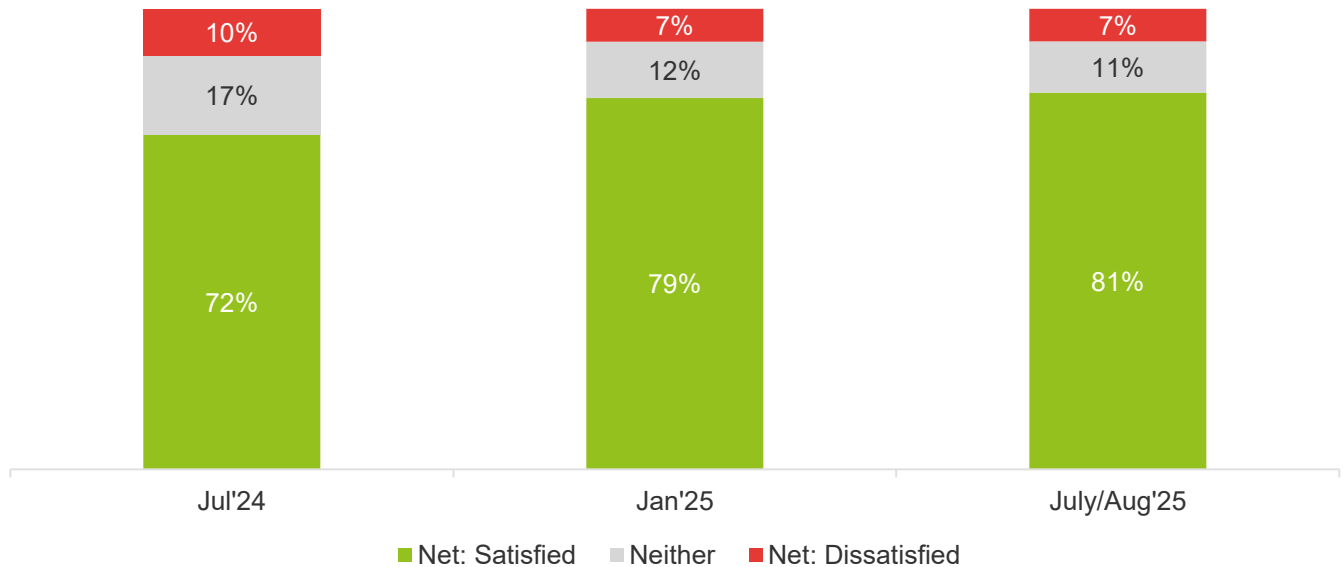


E14. Would you say your query, issue or question was answered or resolved? Base: All who contacted or tried to contact: Jul/Aug'25 (1,401), Jan'25 (1,388), Jul'24 (1,398). Significance is marked versus the previous wave only. Unsure (1%) and not applicable (1%) not shown here.

Satisfaction with range of contact methods available

Four in five (81%) are satisfied with the range of methods available to contact their supplier, maintaining the uplift seen from 72% in July 2024 to 79% in January 2025. Less than one in ten (7%) are dissatisfied in this respect.

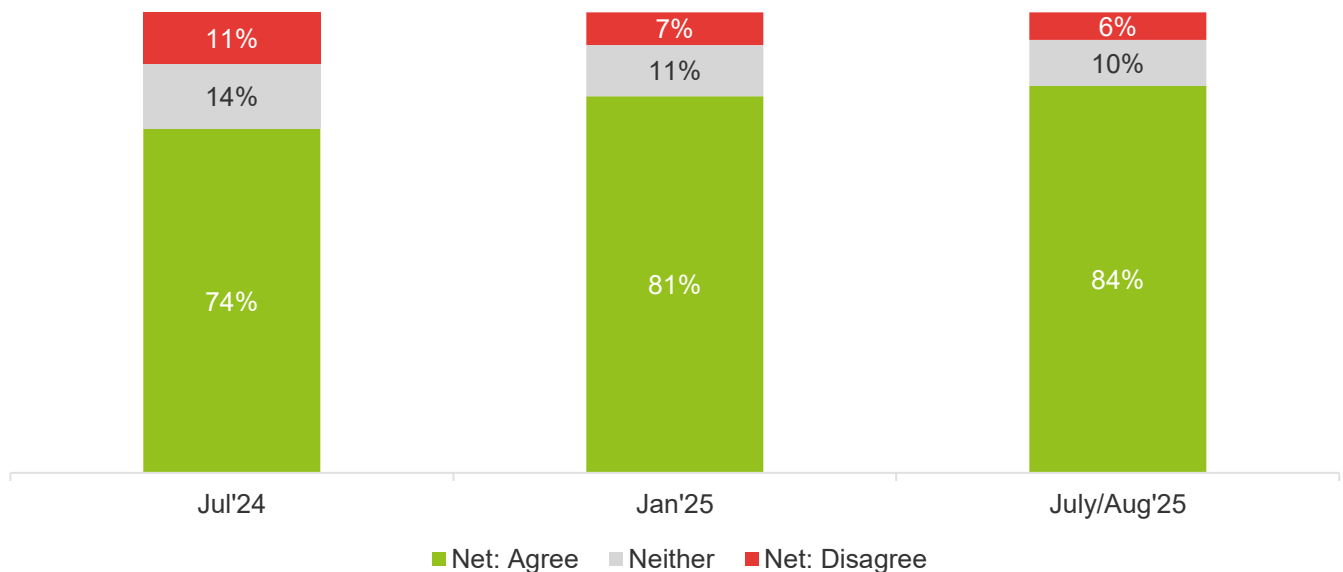
Figure 31: Satisfaction with range of methods available to contact supplier



Source: E16. To what extent are you satisfied or dissatisfied with the range of methods available to contact [Supplier]? Base: all who contacted or tried to contact: July/Aug'25 (1,401), Jan'25 (1,388) Jul'24 (1,398). Unsure (1%) and prefer not to answer (0%) not shown here.

Similarly, gains made in terms of agreement that the contact methods available meet customers' needs have also been maintained, with over four in five (84%) agreeing that this is the case.

Figure 32: Agreement that contact methods available meet needs



E17. To what extent do you agree that the contact methods offered meet your needs? Base: all who contacted or tried to contact: July/Aug'25 (1,401), Jan'25 (1,388) Jul'24 (1,398). Don't know (1%) and not applicable (0%) not shown here.

Information provided by suppliers

Overview of findings

- **Satisfaction with the information provided by suppliers has remained stable:** satisfaction with the information received from their supplier has remained in line with January 2025, at 85%.
- **Information is seen as useful:** all types of information were regarded as useful by at least four in five respondents. Perceived usefulness has increased since January 2025 in relation to information about complaints and comparing energy prices.
- **Information about getting a smart meter continues to be seen as the least useful:** 62% of those who don't have a smart meter or don't know if they have one felt information about getting a smart meter was useful. This was much lower than all other information received.

Satisfaction with information received

Satisfaction with the information received from suppliers in the last 6 months continues to be rated positively, with over four in five (85%) reporting satisfaction, and less than one in twenty (3%) reporting dissatisfaction in this respect.

Figure 33: Satisfaction with information received



D1. Overall, how satisfied or dissatisfied are you with the information you have received from [supplier] in the last six months? Base: received information: July/Aug'25 (2,528), Jan'25 (2,560), Jul'24 (2,506). Data labels <3% not shown. Unsure (0%) and prefer not to answer (0%) not shown here.

Similarly, satisfaction with the information received from when a prepayment meter was installed continues to be rated positively, with close to nine in ten (88%) reporting satisfaction, and less than one in twenty (3%) reporting dissatisfaction in this respect.

Figure 34: Satisfaction with information received when prepayment meter was installed



D4: Overall, how satisfied or dissatisfied were you with the information given to you by [supplier] when your pre-payment meter was installed? Base: recently changed to prepayment meter: July/Aug'25 (159), Jan'25 (109), Jul'24 (94). Data labels <3% not shown. Unsure (0%) and prefer not to answer (0%) not shown here.

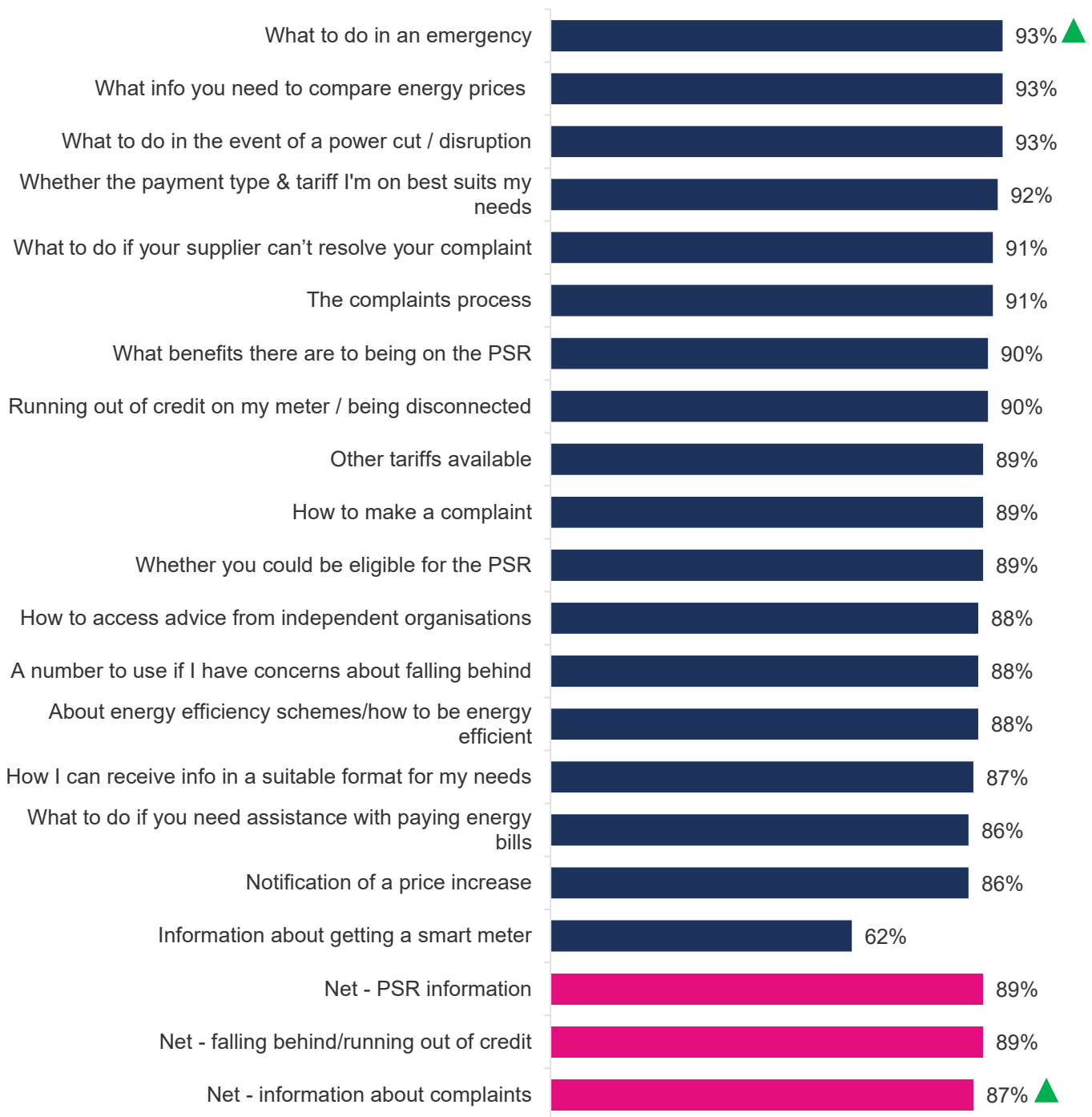


Usefulness of information received from supplier

In terms of the usefulness of the information received from suppliers, all types are regarded as useful by at least four in five respondents, with the exception being information about getting a smart meter, which is regarded as useful by 62% of those who did not have one, in line with previous waves.

Perceived usefulness has increased since January 2025 in relation to the information needed to compare energy prices (from 90% to 93%), and information on complaints (from 83% to 87%).

Figure 35: Usefulness of information received from supplier



D3: How useful was the information you received for each of the following...? Base: Received information (mixed base sizes)

Complaints

Overview of findings

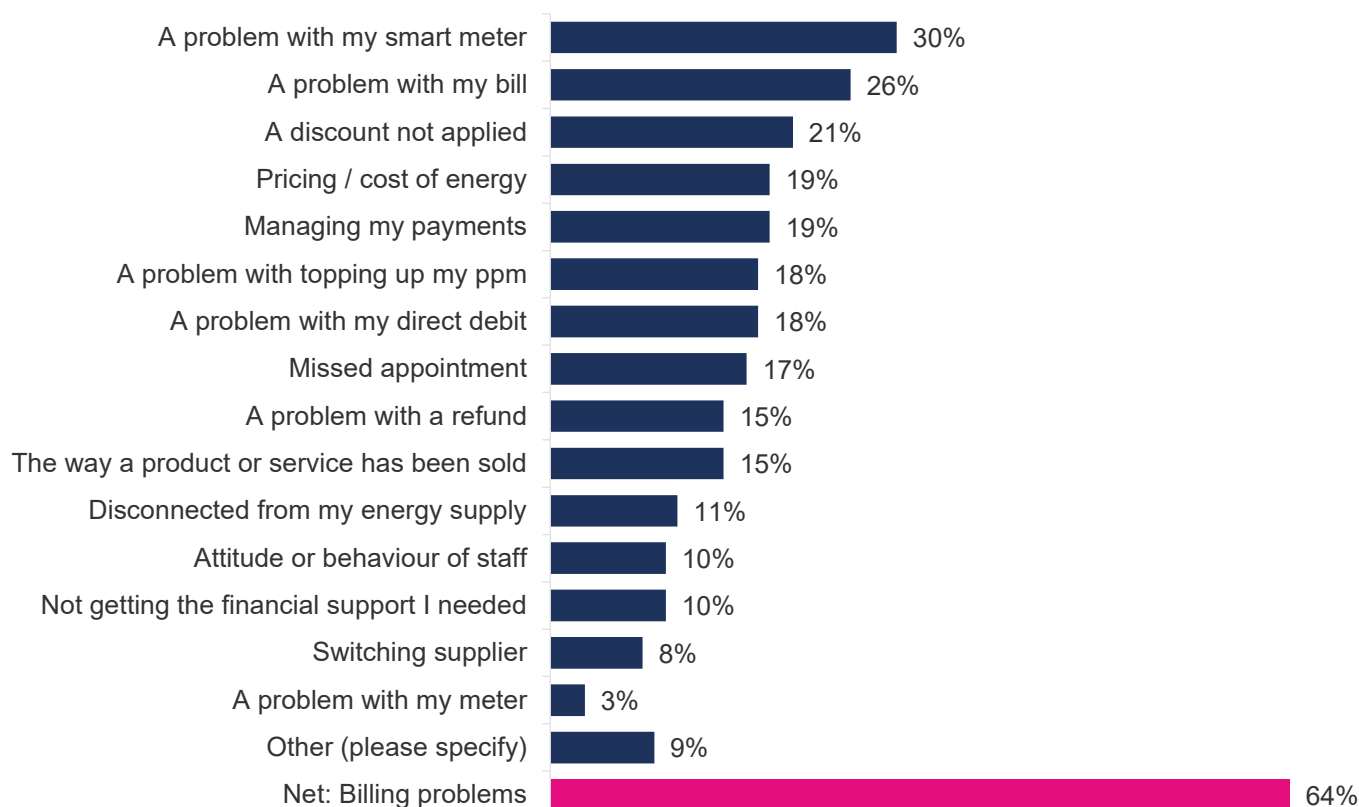
- **Complaint levels remain consistent:** close to one in ten (8%) of respondents who contacted their supplier reported that this was to make a complaint, or about an existing complaint, which equates to 3% of all respondents, in line with previous waves.
- **For the first time, more were satisfied than dissatisfied with complaint handling and process length:** among those who reported making a complaint, 66% were satisfied with the overall handling of complaints and 58% with the time taken to reach the end of the formal complaints process.
- **The proportion of respondents who report receiving external advice about their complaint has increased:** customers who have received advice on their complaints from external bodies has increased from 7% in January 2025 to 21% in the latest wave.¹¹

Reasons for complaints

Close to one in ten (8%) of consumers who contacted their supplier reported making a complaint, which equates to 3% of all respondents, in line with recent waves.

In previous waves, problems with bills were the most common reason for complaining, mentioned by 26% in the latest wave, but this has been exceeded by problems with smart meters in the most recent two waves, mentioned by 30% in both instances. Discounts not being applied, mentioned by 21%, was the next most common reason for complaining.

Figure 36: Reasons for complaints



E8. Earlier you said your last contact with [supplier] was about a complaint. What was the complaint about? Base: All who contacted to make a complaint: Jul/Aug'25 (120)

¹¹ Note that a relatively small sample size (120) means that figures should be treated with caution. However, we can be confident in the statistical significance.

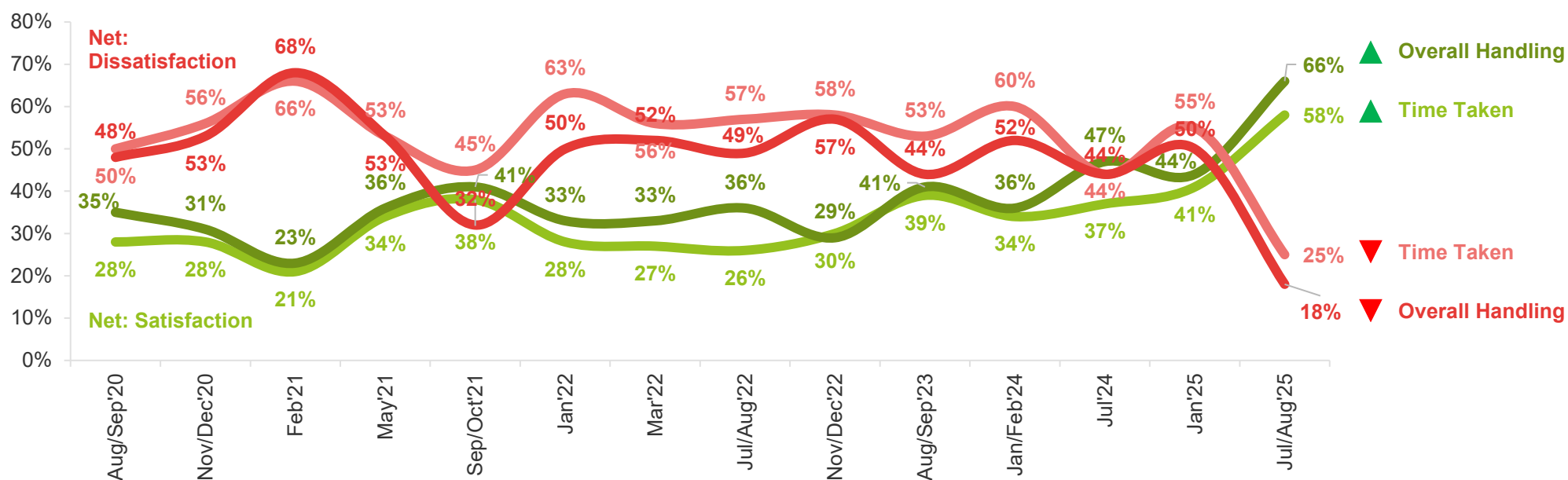
Satisfaction with elements of complaints handling

While satisfaction with the time taken to reach the end of the complaints process, and the overall handling of complaints, tend to be fairly volatile due to low base sizes¹², there have been marked improvements in satisfaction with both measures, with the former increasing from 41% to 58% and the latter from 44% to 66%.

Levels of dissatisfaction have more than halved since January 2025, from 55% to 25% in relation to the time taken, and from 50% to 18% in relation to the overall handling of the complaint, with increases in neither/nor responses making up the difference.

Consequently, this is the first wave where levels of satisfaction with complaints handling can robustly be said to be significantly higher than levels of dissatisfaction.

Figure 37: Satisfaction with time taken to reach the end of the complaints process and overall handling of complaints*

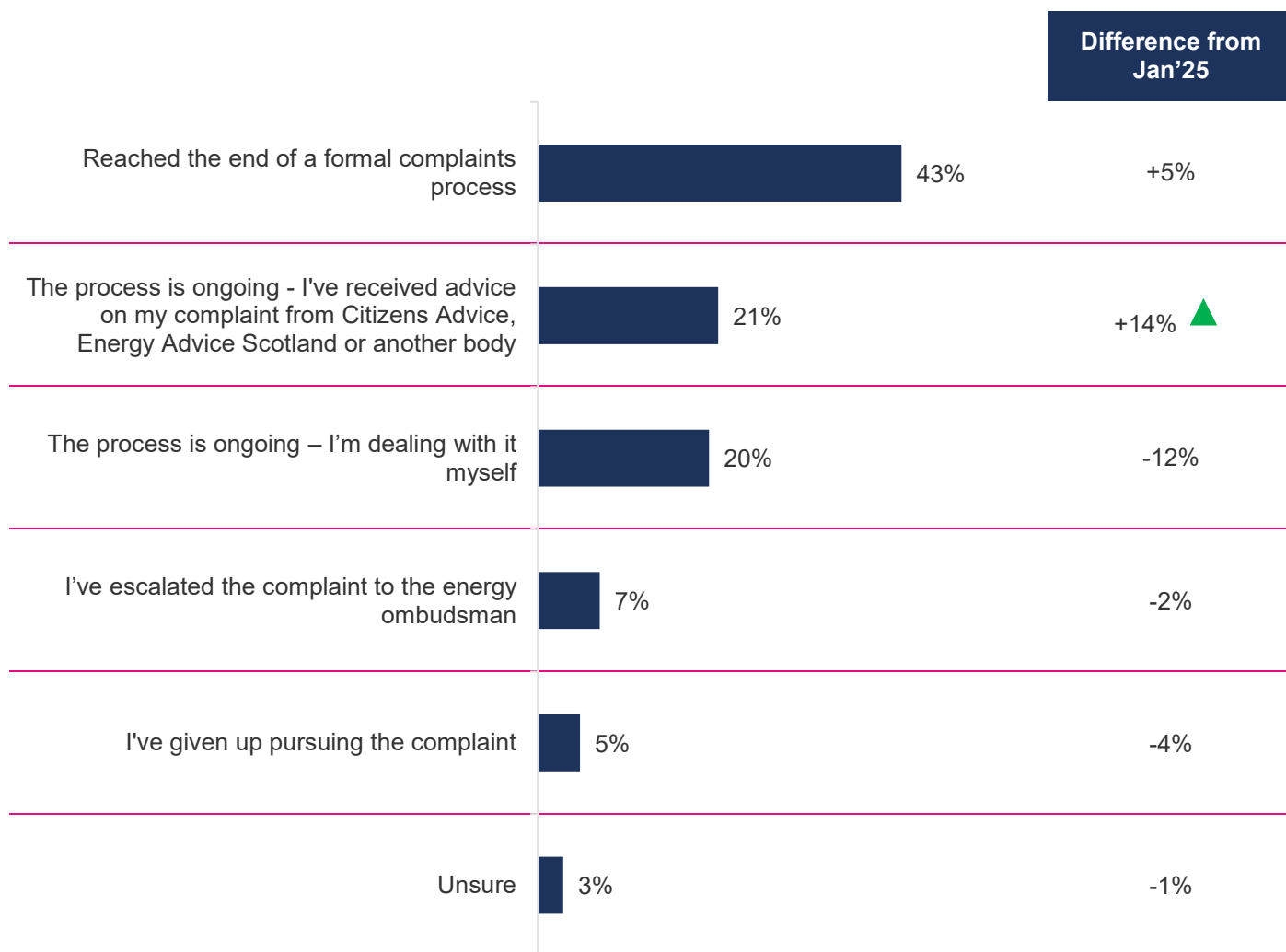


E10. Please can you tell me how satisfied or dissatisfied you are with the following aspects of your complaint: Overall handling of the complaint and the time taken to reach the end of the formal complaints process. Base: All who contacted to make a complaint Jul/Aug'25 (120). Intervals between surveys vary. Significance is marked versus the previous wave only. *Sample sizes for this metric are relatively low, so some caution should be taken when interpreting the results.

¹² Base sizes for the metrics “The time taken to reach the end of the formal complaints process” and “The overall handling of the complaint” have ranged from 87- 149 in the past five waves. While bases are large enough for us to be confident in the statistical significance applied, the data should be interpreted with caution.

More respondents reported receiving external advice about their complaint this wave, up from 7% in January 2025 to 21%.

Figure 38: Stage of complaint



E9. What stage are you at with the complaint process? Base: contacted to make a complaint: Jul/Aug'25 (120)

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

Overview of findings

- **Reported affordability issues persist despite wider financial pressures easing:** one in ten (10%) continue to report that they had fallen behind on their bills or had run out of credit on their prepayment meter for affordability reasons.
- **The proportion of respondents who have been in contact with their supplier about help paying bills after falling behind or running out of credit has increased to the highest level to date:** 78% of those who said they have fallen behind on their bills reported contact with their supplier. This has increased from January 2025 (69%), with this increase being driven by supplier-initiated contact (20% cf. 14%).
- **Over three quarters were satisfied with the support they received when they contacted their supplier for this reason:** there was a higher proportion of those who have fallen behind or run out of credit who then said they were very satisfied with the support received from their supplier (43% up from 34% in January 2025).

Falling behind or running out of credit for affordability reasons

The share of consumers who reported that in the last three months they had fallen behind on their bills or ran out of credit on their prepayment meter for affordability reasons has remained stable compared to previous waves (10% across all payment types).

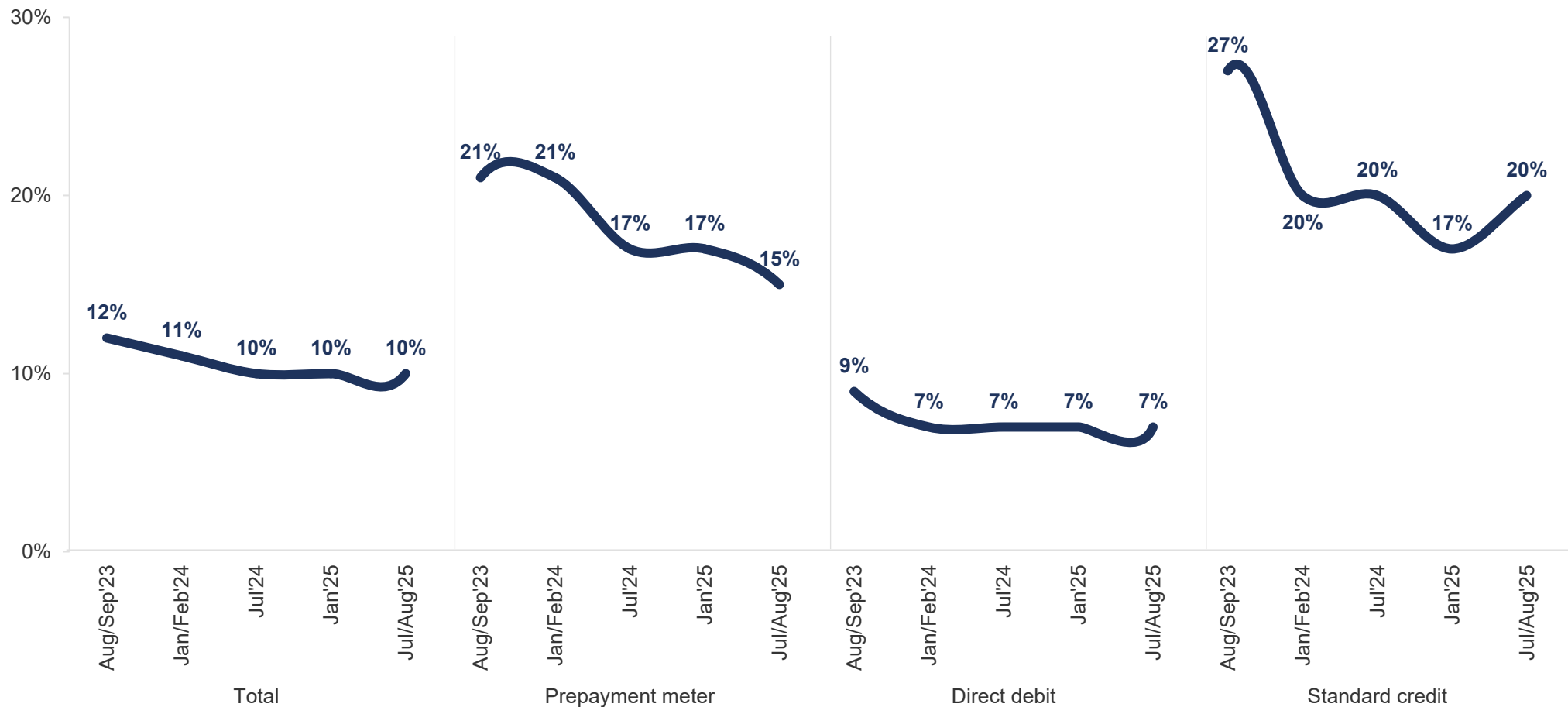
Therefore, despite a greater number of consumers reporting better financial circumstances, such as the increasing number of consumers 'doing well', the number who reported falling behind or running out of credit has remained mostly flat over the past couple of years.

The survey reports on the share of consumers who say they have fallen behind, rather than the level or amount of debt consumers may be in. Data from Ofgem shows that we continue to see a rise in the overall level of domestic debt and arrears.¹³

When considering how the proportion of consumers who have fallen behind or run out of credit differs across the three payment types, direct debit customers (7%) continue to be less likely to report falling behind compared to prepayment meter customers running out of credit (15%) and standard credit customers falling behind on their bills (20%). However, compared to 2023, the gap between the three payment methods is starting to close – the largest gap of 18 percentage points recorded was in August/September 2023 between standard credit (27%) and direct debit (9%), compared to a gap of 13 percentage points between the same payment types in July/August 2025.

¹³ [Debt and arrears indicators | Ofgem](#)

Figure 39: Fallen behind on direct debit or standard credit or run out of credit on prepayment meter for affordability reasons



G1: Thinking about the past 3 months, has your household fallen behind on an energy bill so that you owed money to your energy supplier? Base: Direct debit (Jul/Aug'25: 2,543), standard credit (Jul/Aug'25: 642). G2: Thinking about the past 3 months, has your household run out of credit on your prepayment meter so that you have been temporarily disconnected from your energy supply? Base: Prepayment meter (Jul/Aug'25: 742)

Contact with supplier

The proportion of customers who reported falling behind and have been in contact with their supplier about support in paying their bills has increased to 78% in July/August compared to 69% in January 2025. While the majority (58%) reported initiating the contact with their supplier, the increase in those in contact can primarily be attributed to suppliers contacting their customers, up to 20% from 14%.

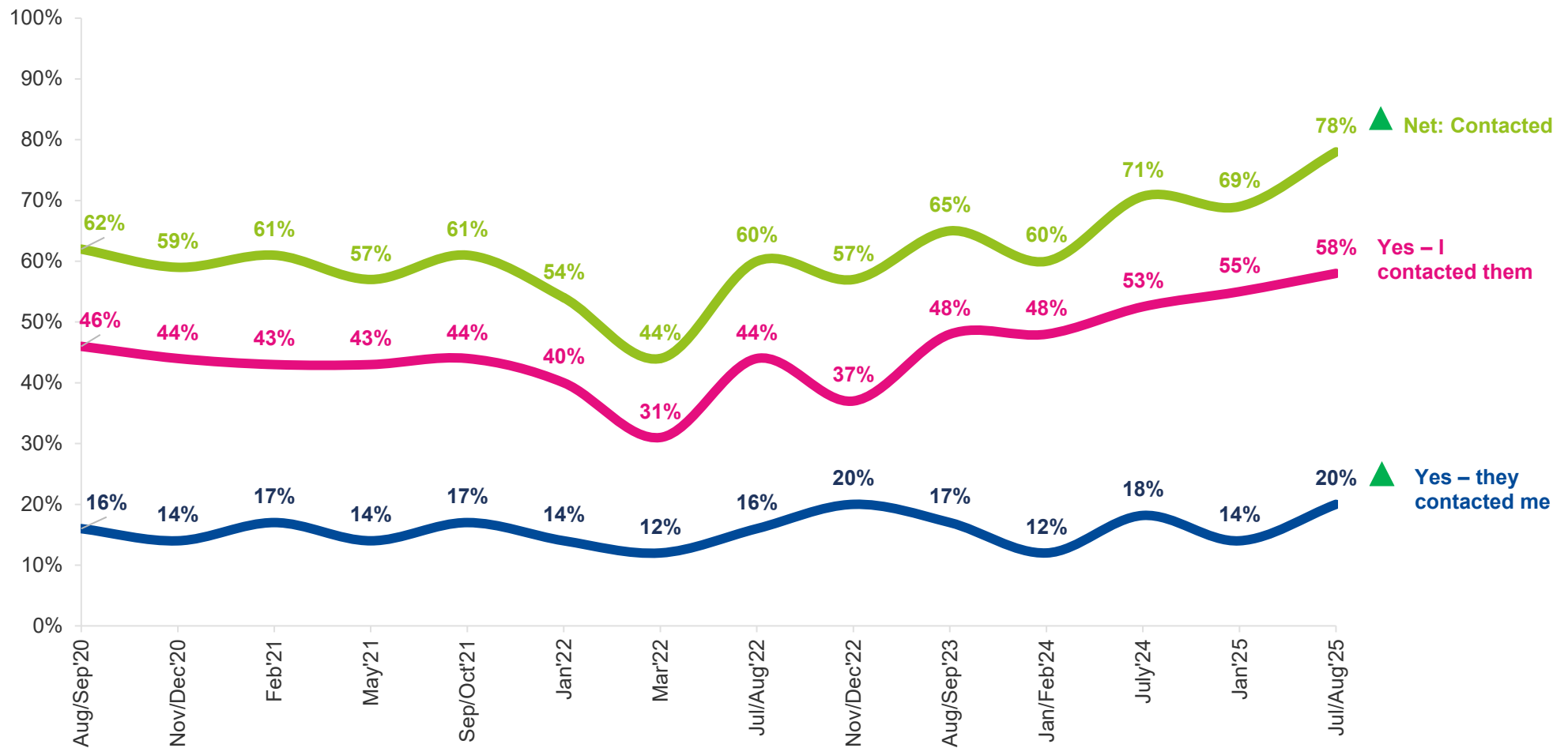
However, supplier-initiated contact appears to follow a seasonal trend. In the past several waves, higher rates of contact from suppliers were reported in the summer months (20% in July/Aug'25, 18% in Jul'24, 17% in Aug/Sep'23), while lower rates have been reported in the winter months (14% in Jan'25, 12% in Jan/Feb'24).

For those who had been in contact with their supplier about support in paying their bills, two in five (38%) reported that the contact was made before they fell behind their bills, while a similar proportion (42%) reported the contact was made just after. A further 16% said that the contact with their supplier was made after they had fallen behind on their bills. This remains in line with previously reported figures.

When contact was made with their supplier about support in paying their bills, for around half of cases (46%) this contact was made via the phone. The next most common methods were email (36%) and through live chat (24%). Though not the most common contact method, the proportion of customers who contacted their supplier through social media increased from 10% in January 2025 to 18% in July/August 2025.



Figure 40: Contact with supplier about help paying bills after falling behind/running out of credit for affordability reasons over time

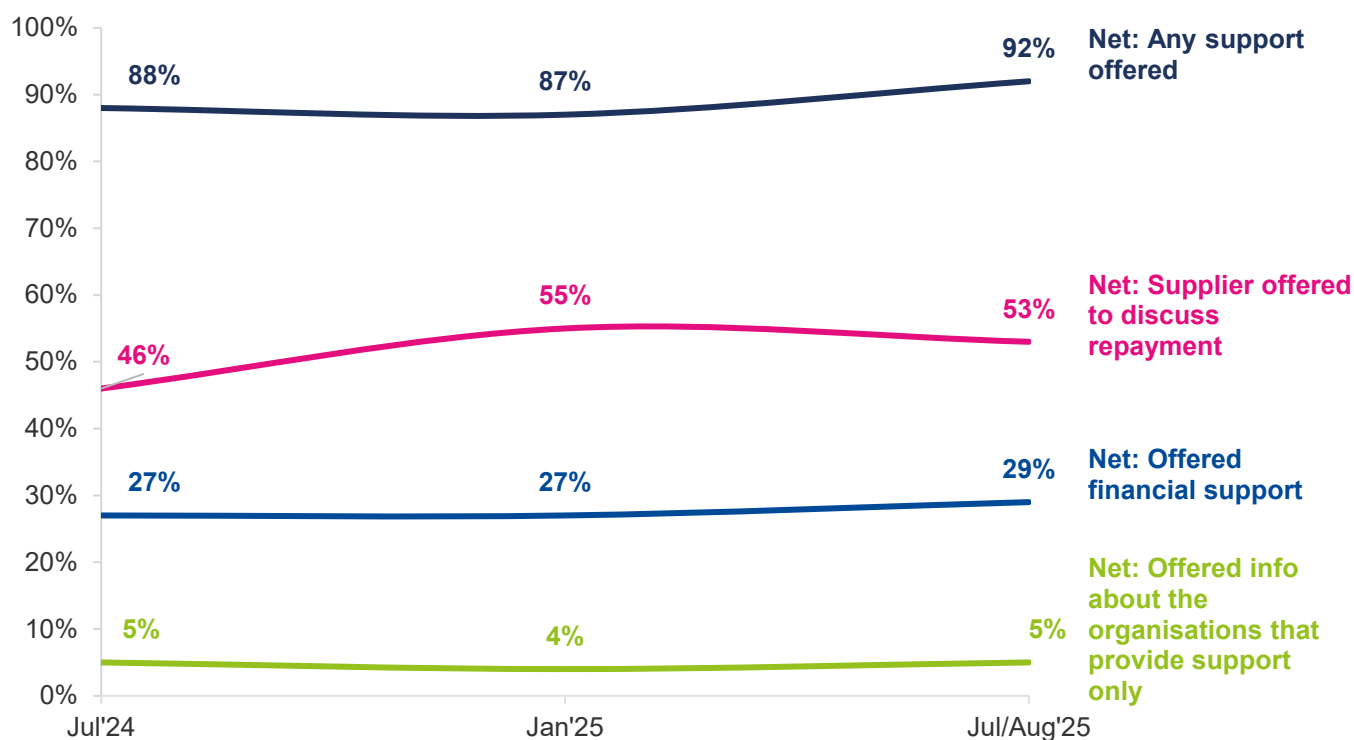


G7: Have you been in contact with your energy supplier about help with paying your bills? Base: Run out of credit/fallen behind for affordability reasons or don't know: Jul/Aug'25 (427), Jan'25 (446), Jul' 24 (456). Intervals between surveys vary.

Support offered by supplier

Around three in ten (29%) suppliers offered financial support to their customers who had fallen behind on their bills or run out of credit for affordability reasons. The majority (92%) of customers were offered any type of support, over half (53%) offered to discuss a repayment plan, while 5% offered information about organisations that help provide support. Support offered by suppliers remain in line with the previous two waves.

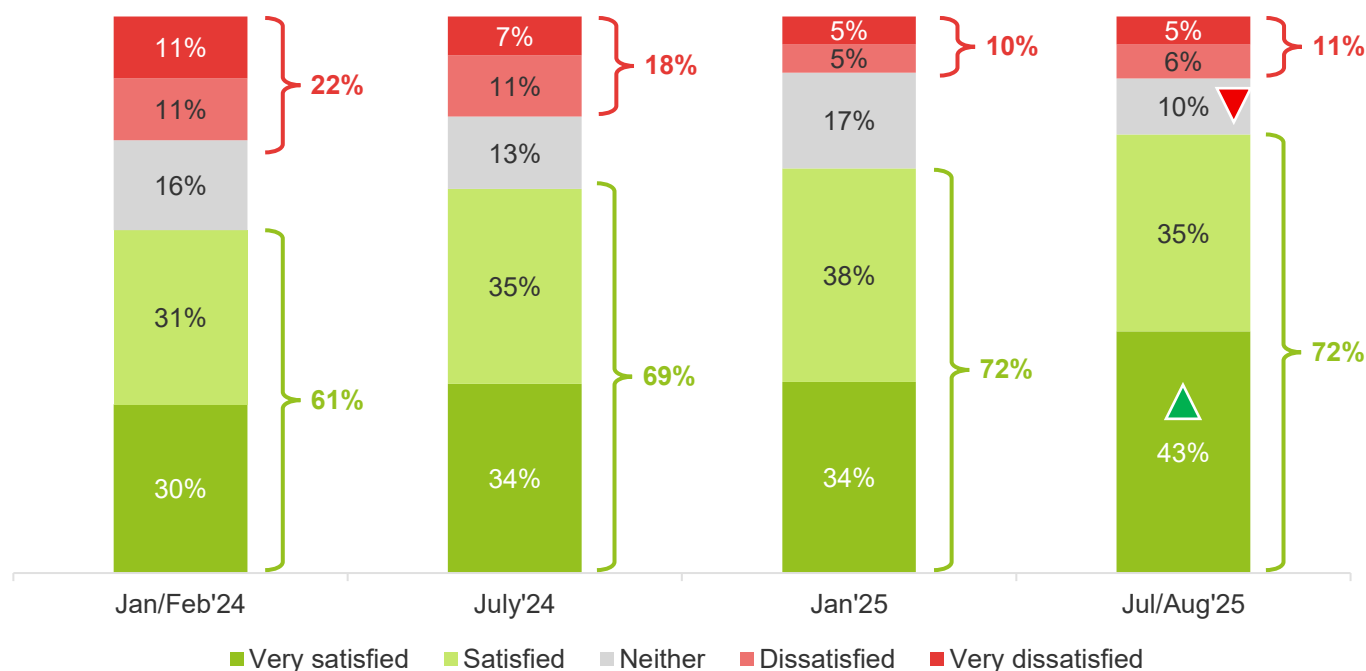
Figure 41: Support offered by supplier among customers that contacted/contacted by their supplier



G12: Please could you say whether your supplier offered to support you in any of the following ways, without you asking? Base: Contacted/been contacted by their supplier and fallen behind for affordability issues (335)

Among those who had fallen behind or run out of credit for affordability reasons and had contact with their supplier about this, four in five (78%) reported that they were satisfied with the support they received from their supplier. This is in line with January 2025 (72%), however there has been an increase in those who said they were very satisfied (43% compared to 34% in January 2025).

Figure 42: Satisfaction with support offered from suppliers for paying for energy among those who have run out of credit/fallen behind for affordability reasons

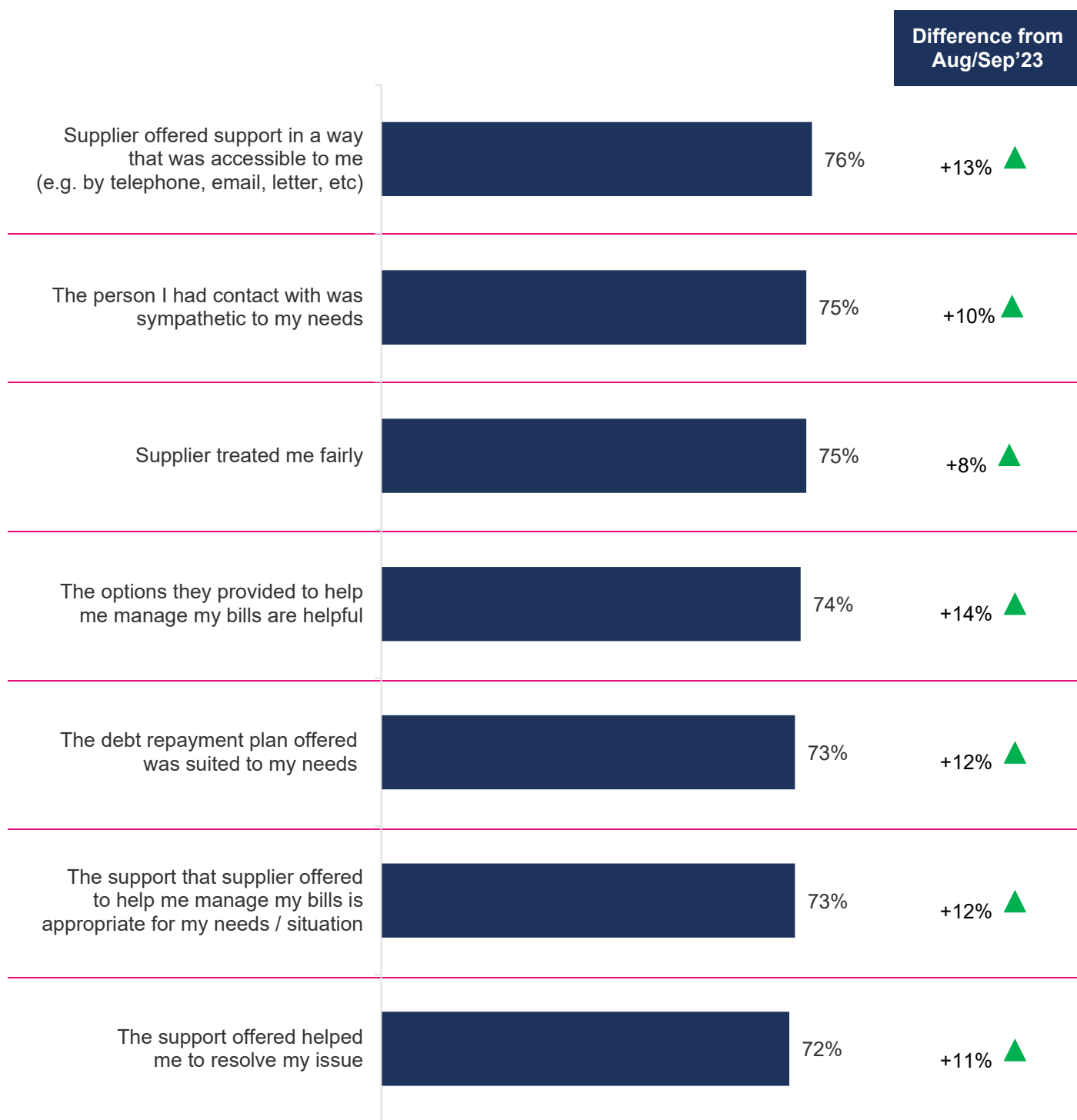


G10: Overall, how satisfied or dissatisfied are you with the support you have received from [supplier] about paying your bills? Base: Contacted or been contacted by their supplier and online and fell behind/ran out for affordability reasons: Jul/Aug'25 (333), Jan'25 (308), Jul'24 (326), Jan/Feb'24 (307). Significance is marked versus the previous wave only. Unsure (0%) and prefer not to answer (0%) not shown here.

Experience of contact with supplier

For those that have been in contact with their supplier about paying their bills, the majority recall a positive experience with that contact. Top contact experiences include the supplier offering support in a way that was accessible (76%), the person they contacted was sympathetic to their needs (75%) and the supplier treated them fairly (75%). While remaining much in line with figures reported in January 2025 and July 2024, agreement with the statements around contact experiences have increased significantly since August/September 2023 across the board.

Figure 43: Experience of different aspects of contact with supplier



G13. To what extent do you agree or disagree with the following statements about the contact you've had with your energy supplier about paying your bills? Please answer on a scale of 1 to 5 where 1 is strongly disagree and 5 is strongly agree. Base: Contacted/been contacted by their supplier and fell behind/ran out for affordability reasons (335)

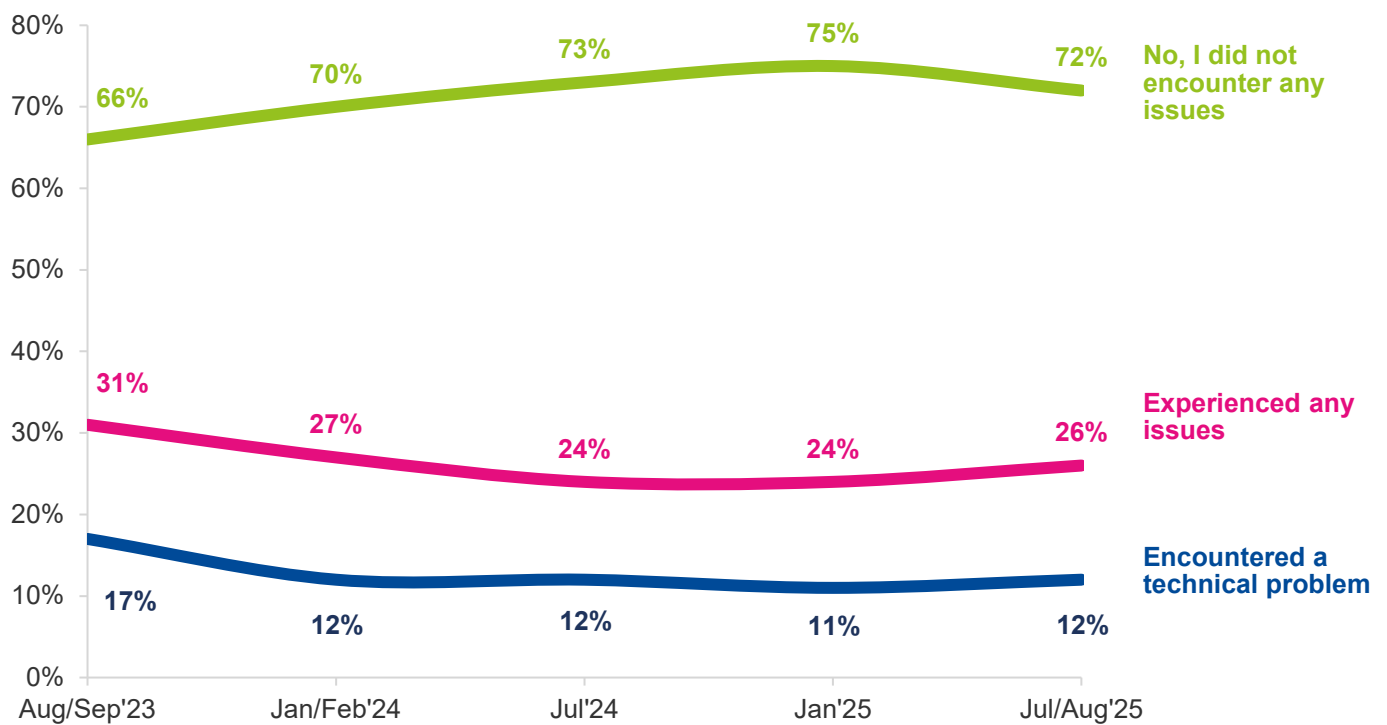
Prepayment meter credit

Issues encountered when topping up prepayment meter

Despite prepayment customers reporting a higher overall satisfaction score this wave, a number still experience problems with their prepayment meter.

A quarter (26%) of prepayment meter consumers reported encountering at least one issue when they last topped up their prepayment meter, with this figure remaining in line since January/February 2024.

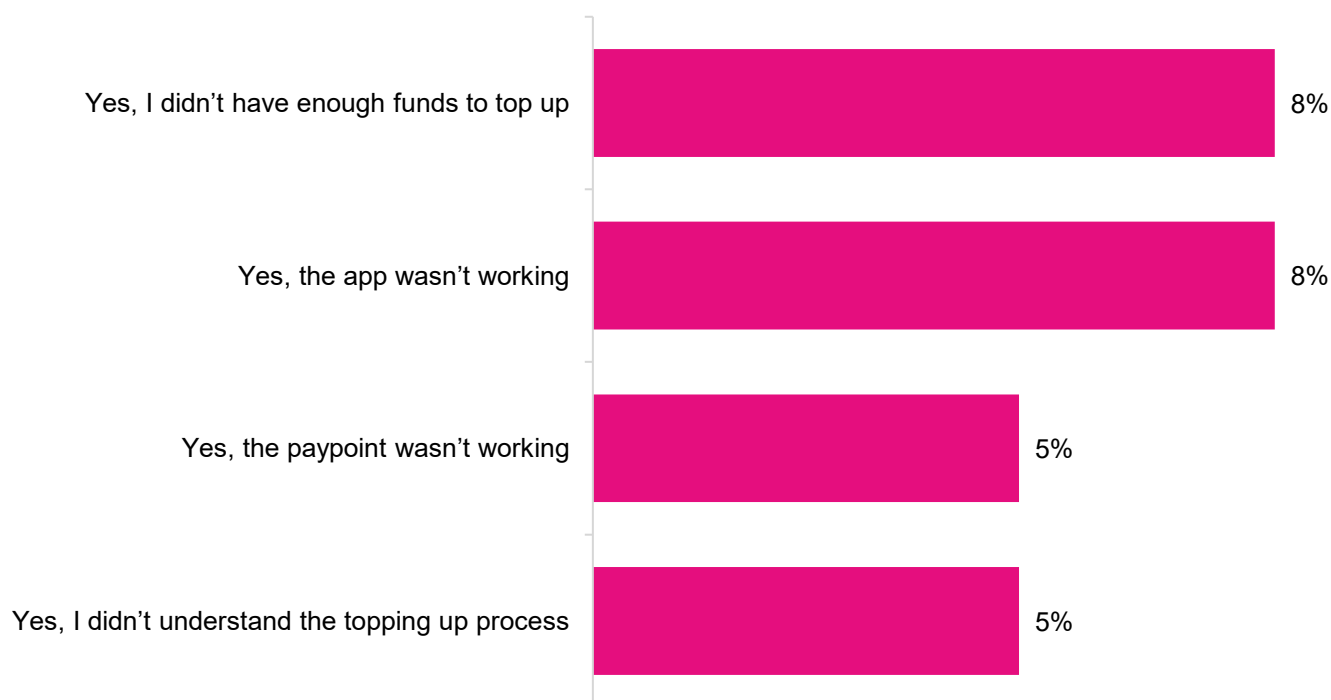
Figure 44: Issues encountered when last topping up prepayment meter



G26: On the last occasion you tried to top up your prepayment meter using your preferred method, did you encounter any issues? Base: Using a prepayment meter: Jul/Aug'25 (688), Jan'25 (674), Jul'24 (663), Jan/Feb'24 (600), Aug/Sep'23 (768). *

Regarding the types of issues encountered, one in ten (8%) reported having insufficient funds to top up, and that the app was not working, and 5% that the paypoint was not working and that they did not understand the process. Figures remain in line with those reported in previous waves.

Figure 45: Issues encountered when last topping up prepayment meter



G26: On the last occasion you tried to top up your prepayment meter using your preferred method, did you encounter any issues? Base: Using a prepayment meter: Jul/Aug'25 (688)

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

Smart meters

Overview of findings

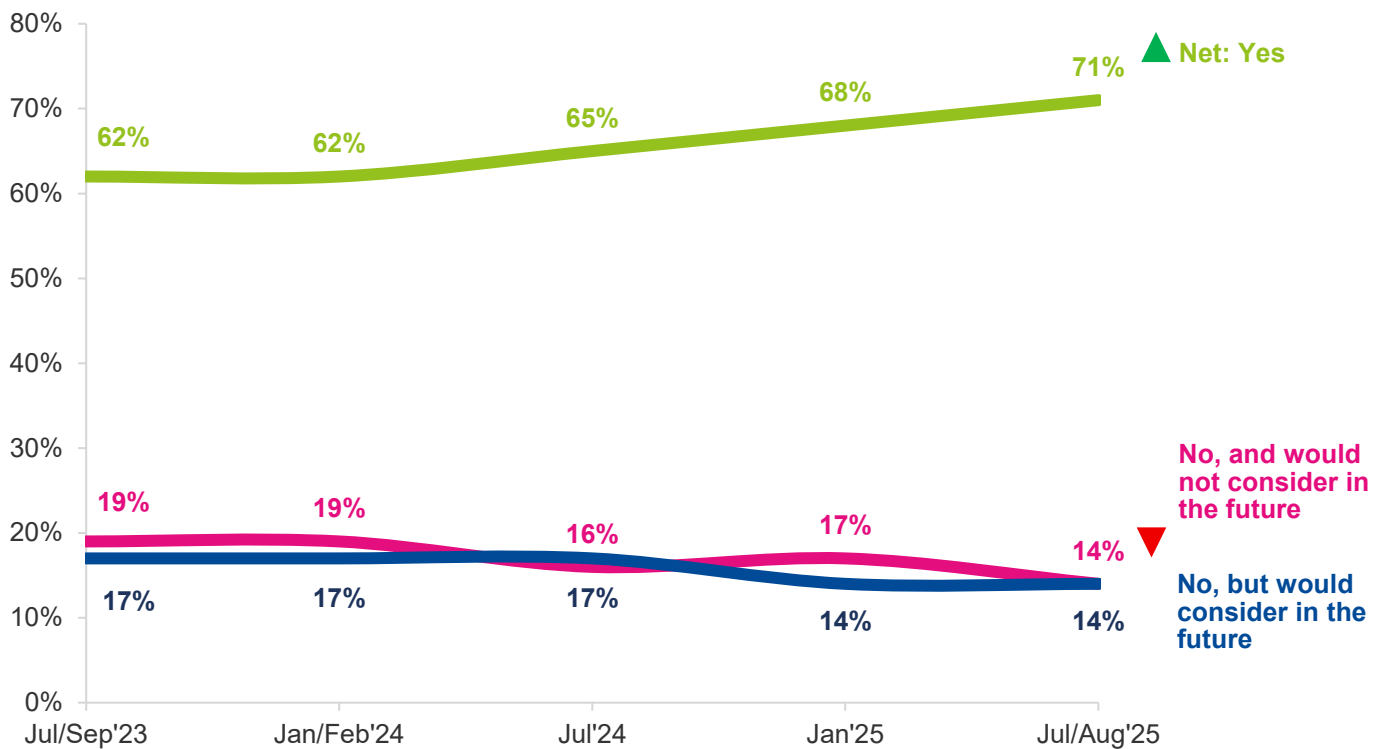
- **Reported smart meter ownership continues to rise and now stands at 71%:** the number of households that reported they have a smart meter has increased again, reaching 7 in 10 households. At the same time, the proportion who said they would not consider getting a smart meter in the future has decreased from 17% in January 2025 to 14% this wave.
- **An increasing number of customers were very satisfied with their smart meter compared to January 2025:** three quarters (77%) were satisfied with their smart meter and there has been an increase in the proportion who said they are very satisfied (38% cf. 34%).
- **Smart meter customers continue to be more satisfied with their supplier than customers who don't have a smart meter:** overall supplier satisfaction among smart meter owners has continued to increase to 86% from 83% in January. Non-smart meter households recorded no similar rise in satisfaction with their supplier.
- **Despite reporting high satisfaction, smart meter issues persist:** over a third (36%) of smart meter customers reported experiencing at least one issue with their meter in the last six months.
- **Overall, respondents reported that the supplier resolved the issue in 55% of instances:** when combining the total number of smart meter issues recorded in the survey, 74% resulted in contact with the supplier. Of these, 55% resulted in the supplier resolving the issue directly.

Smart meter ownership

Reported smart meter ownership continues to rise, and now stands at 71%, largely in line with reported smart-meter ownership reported in official statistics.¹⁴

As smart meter ownership continues to rise, the proportion of households without a smart meter and would not consider getting one in the future has decreased from 17% in January 2025 to 14% in July/August 2025. This suggests that there has been a drop in resistance to smart meters amidst the continuation of the national smart meter rollout.

Figure 46: Smart meter ownership and consideration of getting a smart meter



Source: C1. Do you have a smart meter in your household? Base: All respondents: Jul/Aug'25 (3,790), Jan'25 (3,854), Jul'24 (3,750), Aug/Sep'23 (3,855), Jan/Feb'24 (3,742). Significance is marked versus the previous wave only. Data labels below 3% not shown.

Older respondents and digitally excluded respondents both recorded a higher resistance to getting a smart meter – 22% of customers aged 65+ and 23% of those digitally excluded said they do not have a smart meter and would not consider getting on in the future.

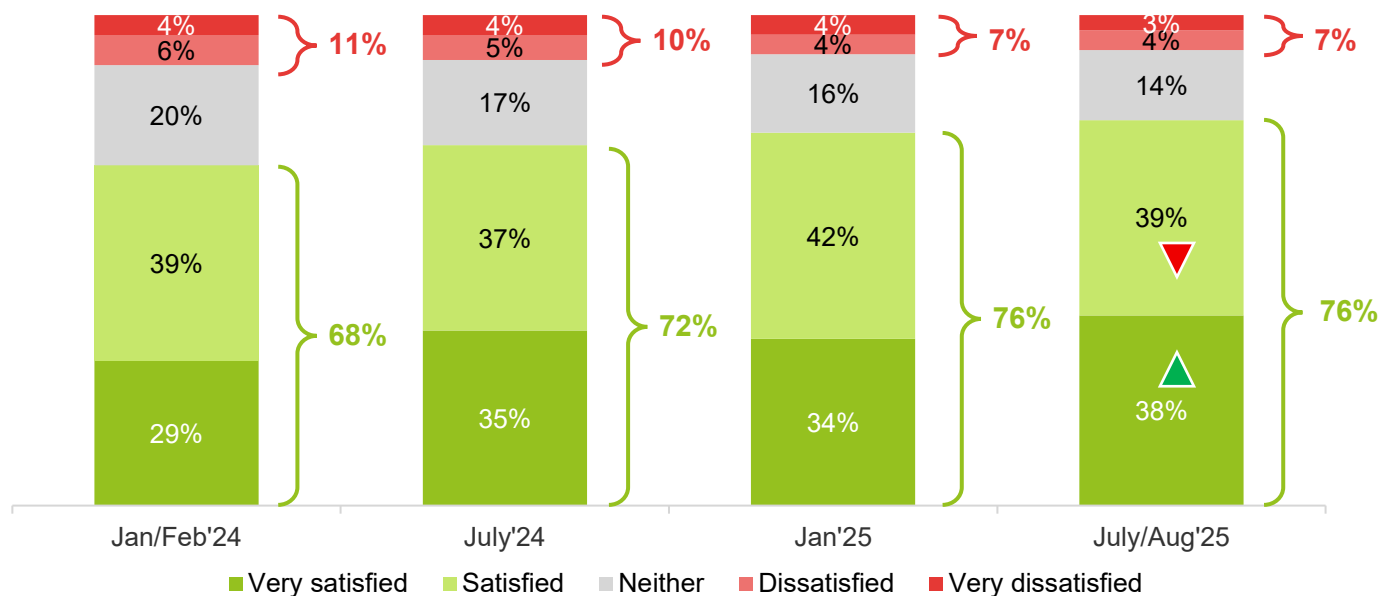
Moreover, customers classified in the 'doing well' financial vulnerability classification were more likely to report having a smart meter in their household (76%), whereas this was two thirds for 'financially vulnerable' (64%) and 'highly financially vulnerable' (64%) customers.

Satisfaction with smart meters

Just over three quarters (77%) are satisfied with their smart meter, which has remained stable compared to January 2025 (76%). However, there has been an increase in the proportion who say they are very satisfied with their smart meter, from 34% to 38%. Less than one in ten (7%) are dissatisfied, which also remains in line with January 2025.

¹⁴ [Q2 2025 Smart Meters Statistics Report](#)

Figure 47: Satisfaction with smart meter

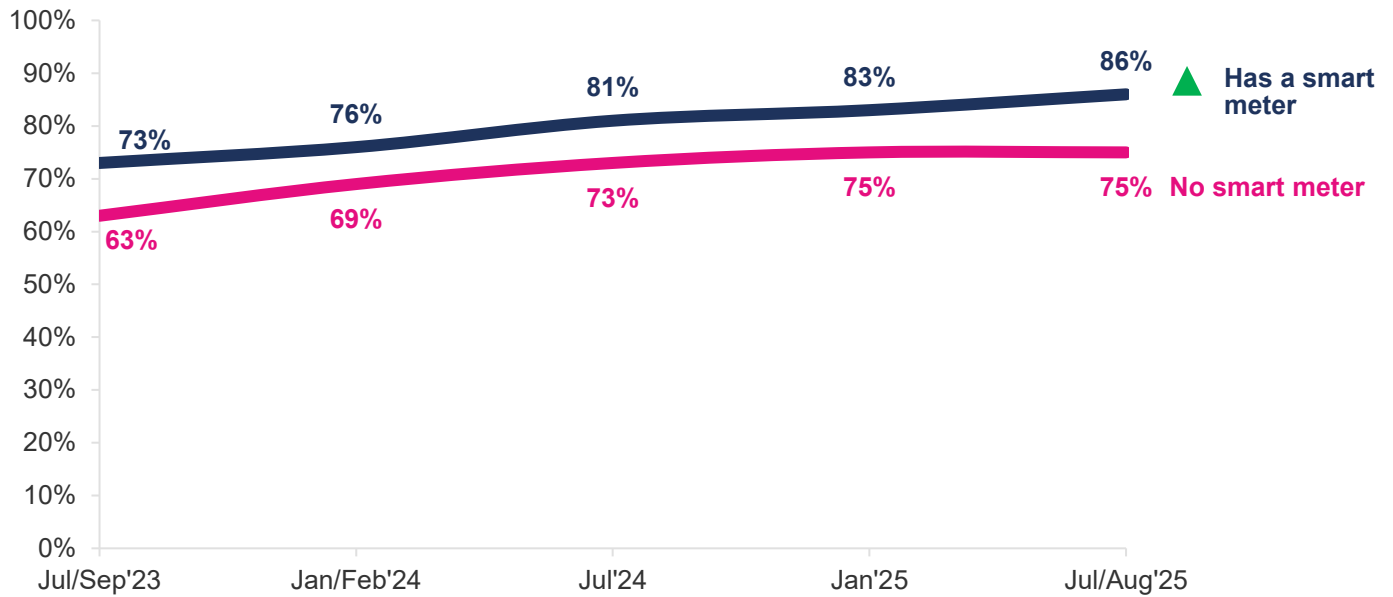


C6. Overall, how satisfied or dissatisfied are you with your smart meter? Base: Those with a smart meter: July/Aug'25 (2,648), Jan'25 (2,577), Jul'24 (2,403), Jan/Feb'24 (2,350). Data labels under 4% not shown. Unsure (1%) and prefer not to answer (0%) not shown here.

Smart meter households continue to be more satisfied with their supplier compared to those without. Overall satisfaction for smart meter owners has increased from 83% in January 2025 to 86% in the latest wave, while non-smart meter customers have recorded no similar rise and continue to report a lower overall satisfaction score (75%).



Figure 48: Overall supplier satisfaction by non/smart meter customers



A5: Overall, how satisfied or dissatisfied are you with [supplier] as your supplier of <FUEL TYPE>? Base: Has a smart meter: July/Aug '25 (2,701), Jan'25 (2,629), Jul'24 (2,457), Jan/Feb'24 (2,404), Jul/Sep'23 (2,337); Does not have a smart meter: July/Aug '25 (1,046), Jan'25 (1,186), Jul'24 (1,255), Jan/Feb'24 (1,406), Jul/Sep'23 (1,361)

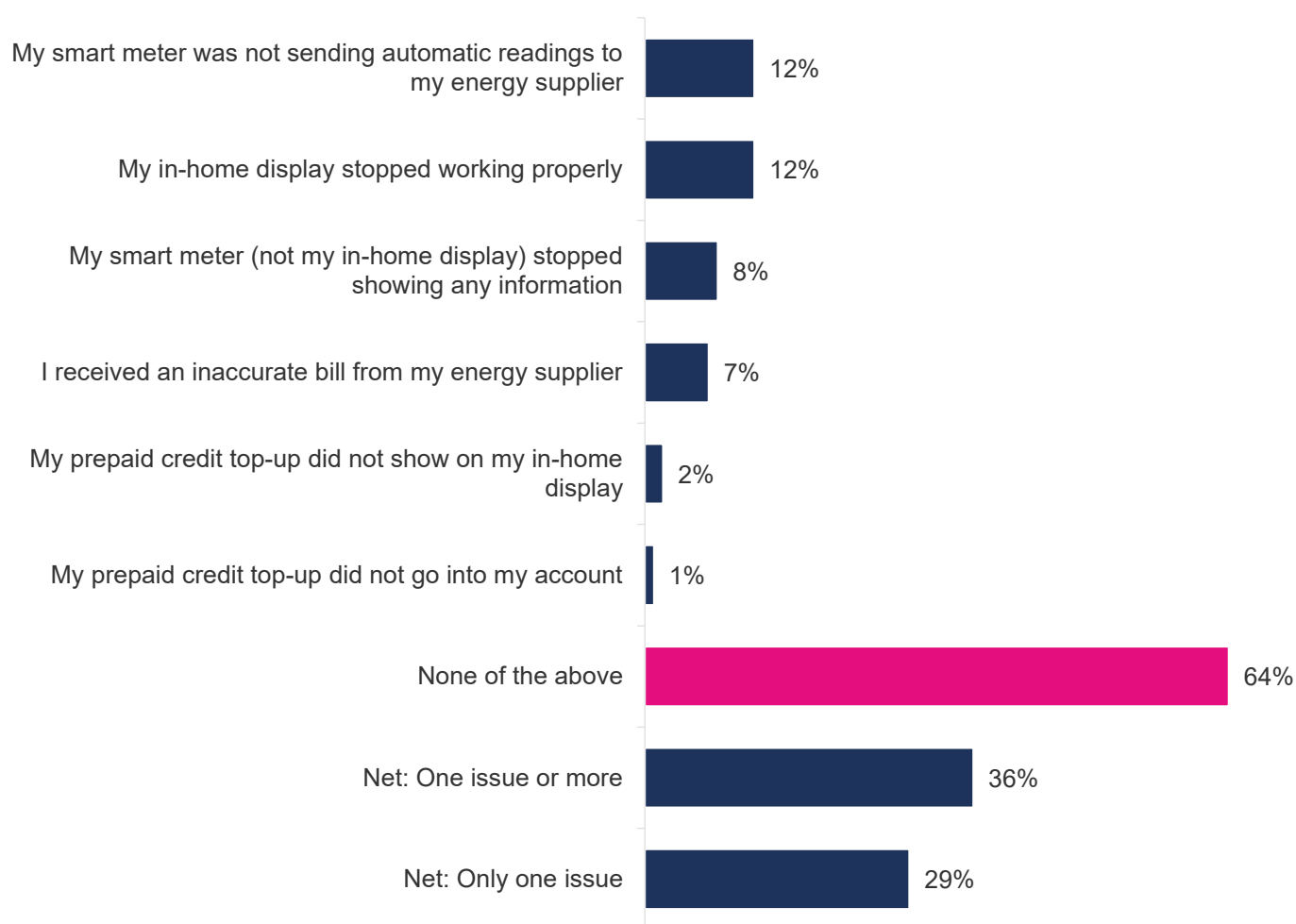
Issues with smart meters

Although satisfaction with smart meters remains high, issues with smart meters continue to be reported. Overall, 36% of respondents with smart meters reported experiencing at least one issue in the last six months.

Of the issues experienced, the most reported issues are that the smart meter was not sending automatic readings to their supplier (12%), the in-home display stopped working properly (12%), and the smart meter stopped showing any information (8%).



Figure 49: Experienced issues with smart meter in the last six months¹⁵



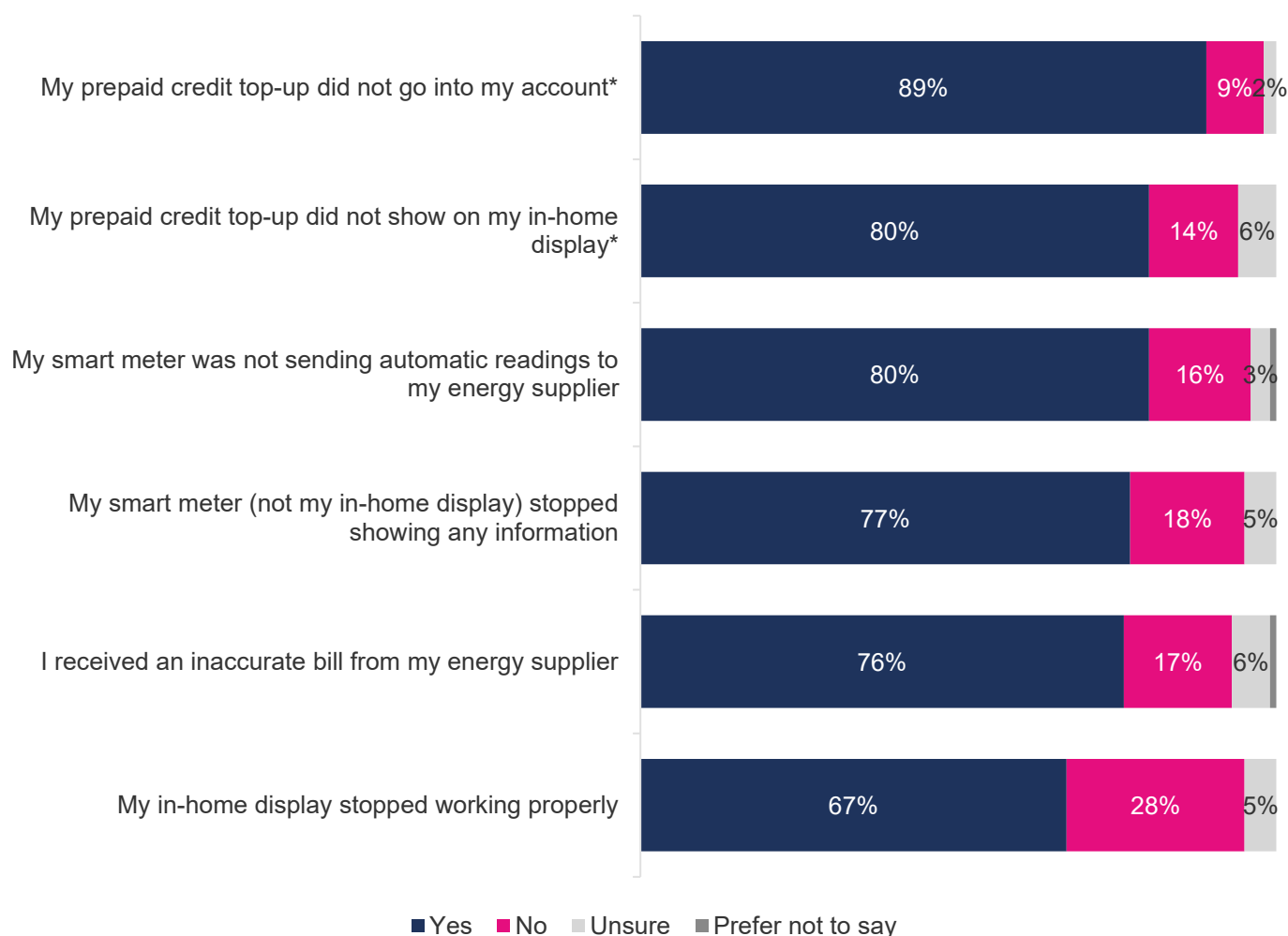
C9. In the last 6 months, have you encountered any of the following issues or problems with your smart meter? Base: Those with a smart meter: Jul/Aug'25 (2,648). Answer codes relating to prepayment meters – “My prepaid credit top-up did not show on my in-home display” and “My prepaid credit top-up did not go into my account” were only shown to prepayment meter customers (742)., whereas in the past they were shown to all respondents.

New to July/August 2025, the survey asked those who experienced at least one issue with their smart meter in the last 6 months if they got in contact with their supplier about the issue.

Overall, contact was made with the supplier in more cases than not, however this varies considerably depending on the type of smart meter issue. Issues such as their smart meter was not sending automatic readings to their supplier resulted in a high frequency of contact (80%), whereas the issue of their in-home display not working properly recorded a 67% contact rate.

¹⁵ Tracking for this question not reported due to a change in methodology. This question previously asked about smart meter issues experienced in the last three months, while in July/August 2025 the question was changed to ask about the last six months.

Figure 50: Contact with supplier about smart meter issues

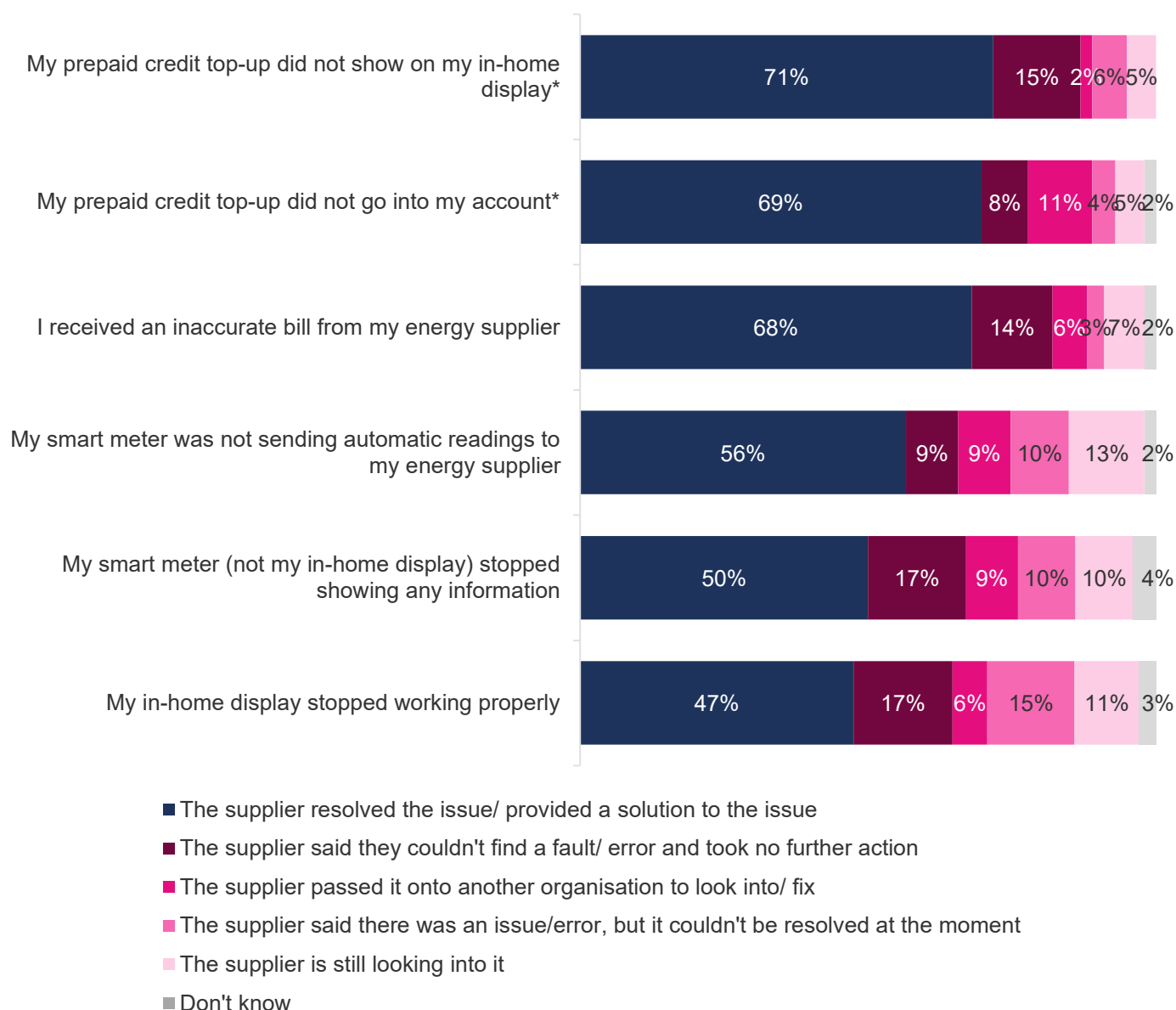


C9D: You mentioned that you had encountered the following issues with your smart meter in the last 6 months. Did you contact your supplier about each issue? Base: Have experienced this issue with a smart meter (49-347). For full sample sizes, see published data tables. *Statements shown to pre-payment customers only, with base sizes notably lower (49-64), so results should be interpreted with caution.

Respondents who got in contact with their supplier about their smart meter issue(s) were asked the outcome of that contact. A range of outcome options were listed in the survey, including the supplier resolving the issue themselves, no fault or error was found so no further action was taken, the supplier passed the issue onto another organisation to fix, the supplier was not able to resolve the issue and that the supplier was still looking into it.

Outcomes varied depending on the type of smart meter issue. Supplier resolution was more common in relation to bill inaccuracies (68%) and was less common in relation to smart meters not sending readings (56%), smart meters not showing information (50%) and in-home displays stopped working properly (47%).

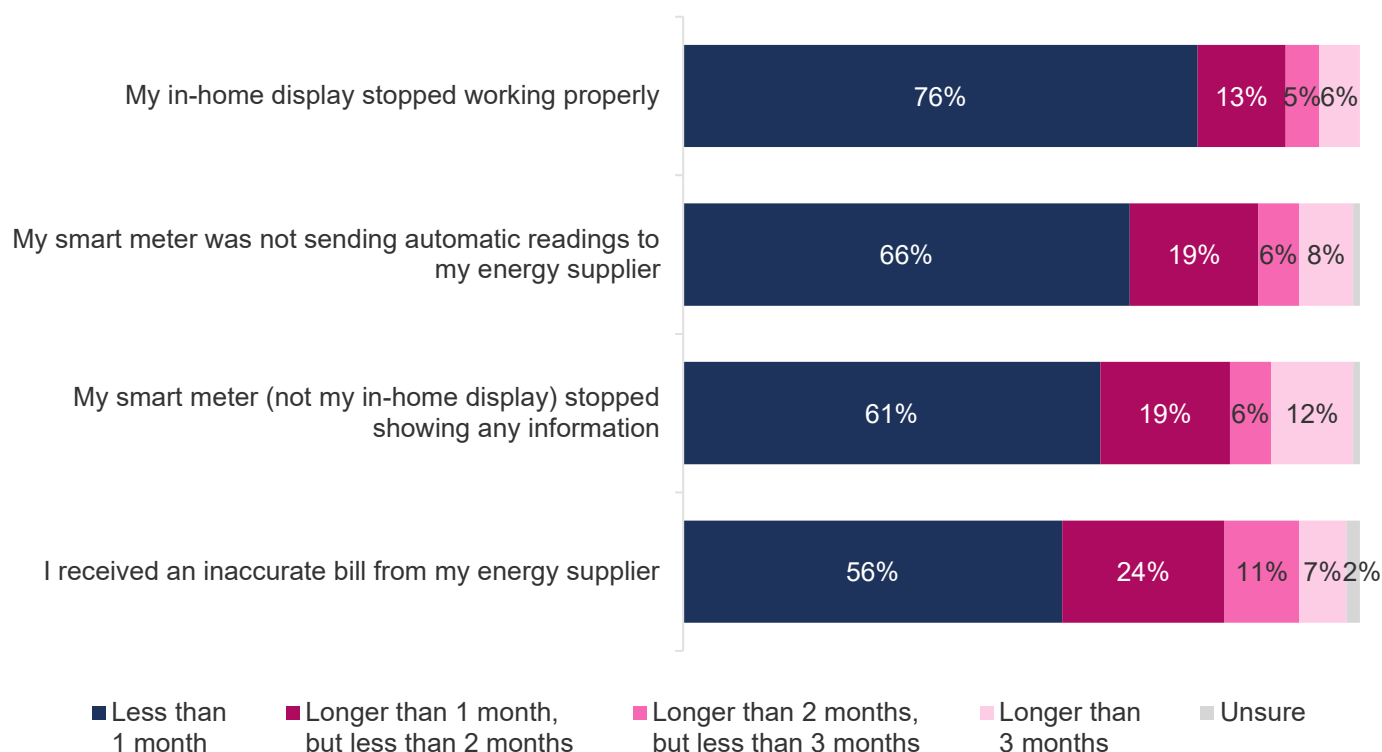
Figure 51: Outcome of contact with supplier about smart meter issues



C9E: What happened when you contacted your supplier about the following issue(s)? Base: Contacted supplier about smart meter issue (33-263). For full sample sizes, see published data tables. *Statements shown to pre-payment meter customers only, with base sizes notably lower (33-39), so results should be interpreted with caution.

Where a supplier was able to resolve the smart meter issue, the majority of cases were handled in less than one month. However, this varied considerably by type of issue, ranging from 76% in relation to in-home displays not working properly, to 56% in relation to receiving an inaccurate bill.

Figure 52: Time taken for supplier to resolve smart meter issues



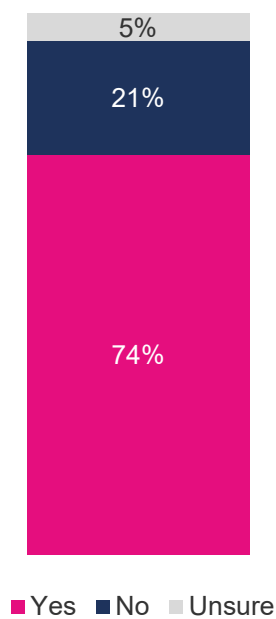
*C9G: How long did it take for your supplier to resolve the issue(s)? Base: Supplier resolved the smart meter issue (95-160). For full sample sizes, see published data tables. * Note that due to low base sizes 'My prepaid credit top-up did not show on my in-home display' (28) and 'My prepaid credit top-up did not go into my account' (23) are not shown here.*

When combining all reported smart meter issues experienced in the survey¹⁶, 74% resulted in contact with the supplier. Suppliers were not made aware of 21% of issues reported in the survey (see figure 53). Of the total number of smart meter issues that led to customer contact, suppliers resolved 55% of cases. In a further 14% of contacts with the supplier, the supplier said they could not find a fault and took no further action. In 10 %, the supplier acknowledged an issue or error but was unable to resolve it at that time (see Figure 54). Of the total number of smart meter issues that were resolved by the supplier, 66% of issues were resolved in less than one month (see figure 55).



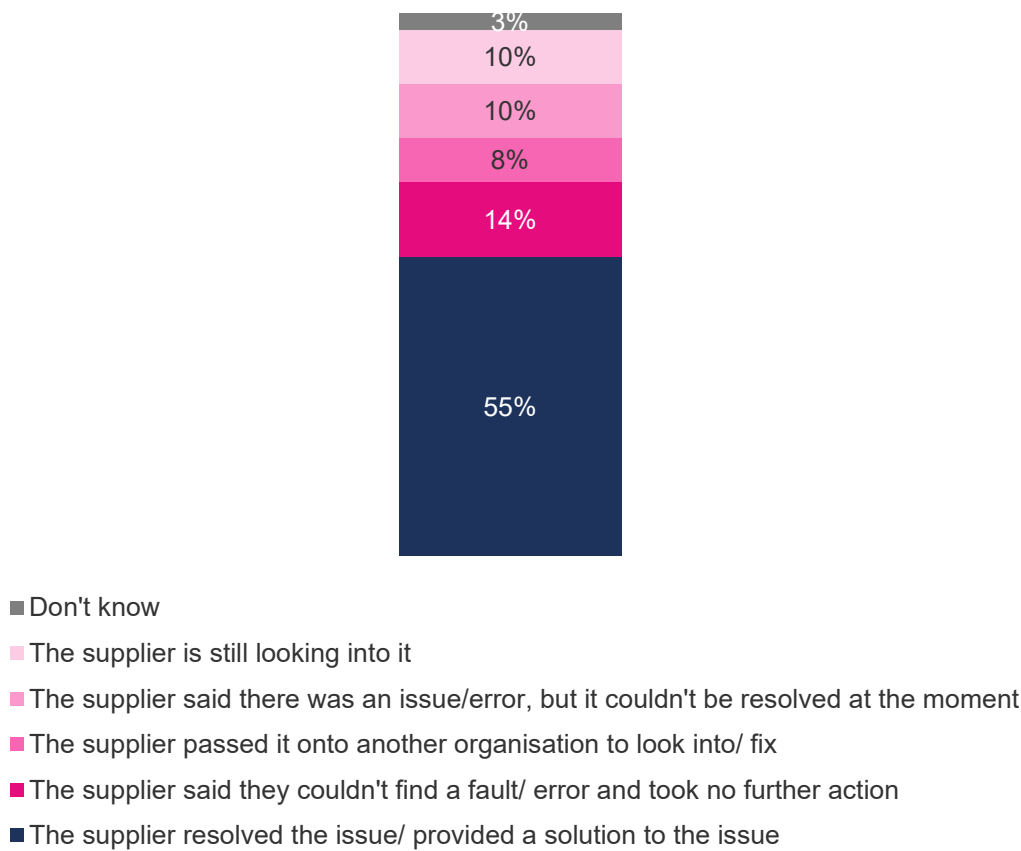
¹⁶ The total number of issues recorded in the survey combines the total counts for each issue, rather than the number of respondents who experienced issues (as a respondent can experience more than one smart meter issue).

Figure 53: Proportion of issues that resulted in contact with supplier



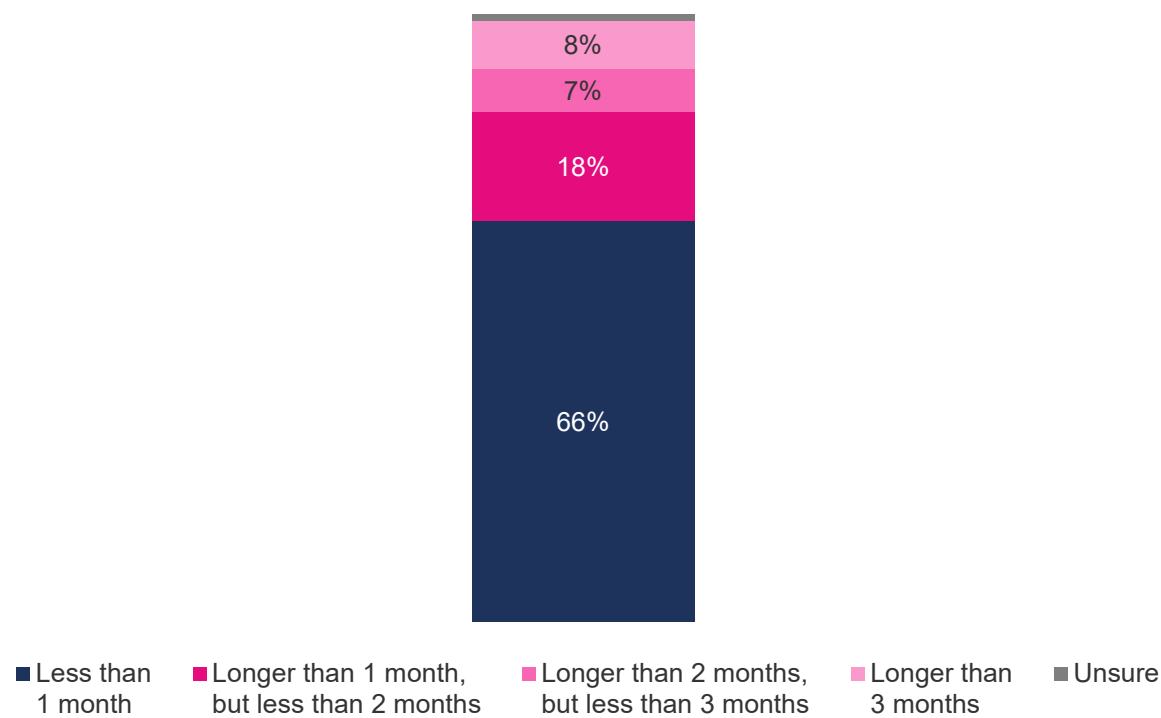
C9D: You mentioned that you had encountered the following issues with your smart meter in the last 6 months. Did you contact your supplier about each issue? Base: Total smart issues experienced (1181)

Figure 54: Actions taken by suppliers in relation to address smart meter issues



C9E: What happened when you contacted your supplier about the following issue(s)? Base: Total contacts with supplier (879)

Figure 55: Time taken for supplier to resolve smart meter issues



C9G: How long did it take for your supplier to resolve the issue(s)? Base: Total issues resolved by supplier (486)

Priority Services Register (PSR)

Overview of findings

- **Largely consistent with previous waves, over a third report that they or a member of their household is on the PSR, while two thirds of these reported receiving a service:** 68% of those who report being on the PSR reported receiving a service from it in the last six months, equating to 26% of the total sample. The most common type of service reported was receiving regular updates during an unplanned power cut or emergency, advanced notice of a scheduled power cut and regular meter reading services.
- **Among those who report that their household is on the PSR, three quarters are satisfied with the services they have received:** a greater number of those on the PSR report being satisfied with the services they've received in July/August 2025 (73%) compared to January 2025 (68%).

Services received from the PSR

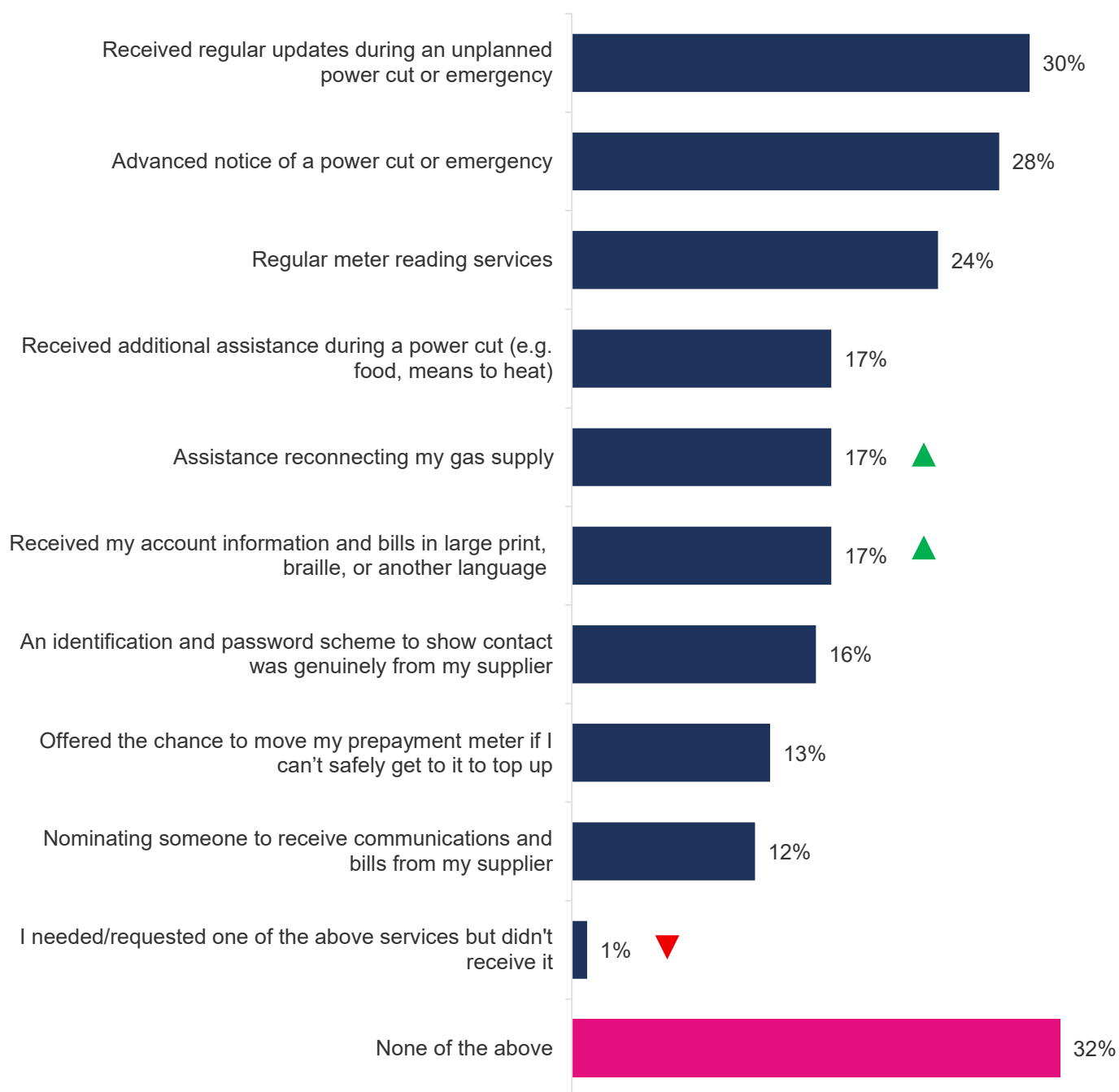
Largely consistent with previous waves, 38% of respondents in July/August 2025 report that they or a member of their household is on the priority services register (PSR). 68% of these report receiving a service from the PSR in the last six months, equating to 26% of the total sample.

The services most commonly received are reported to be regular updates during an unplanned power cut or emergency (30%), advanced notice of a scheduled power cut (28%) and regular meter reading services (24%). The order of services reportedly received remains broadly in line with previous waves.

There has been an increase in the proportion who reported receiving assistance reconnecting their gas supply (from 15% in January 2025 to 17% in the latest wave) and receiving their account information/bills in alternative accessible formats (from 13% to 17%).

On the other hand, fewer said they needed or requested one of the services listed but didn't receive it (from 2% in January to 1% in the latest wave).

Figure 56: Services received from the PSR

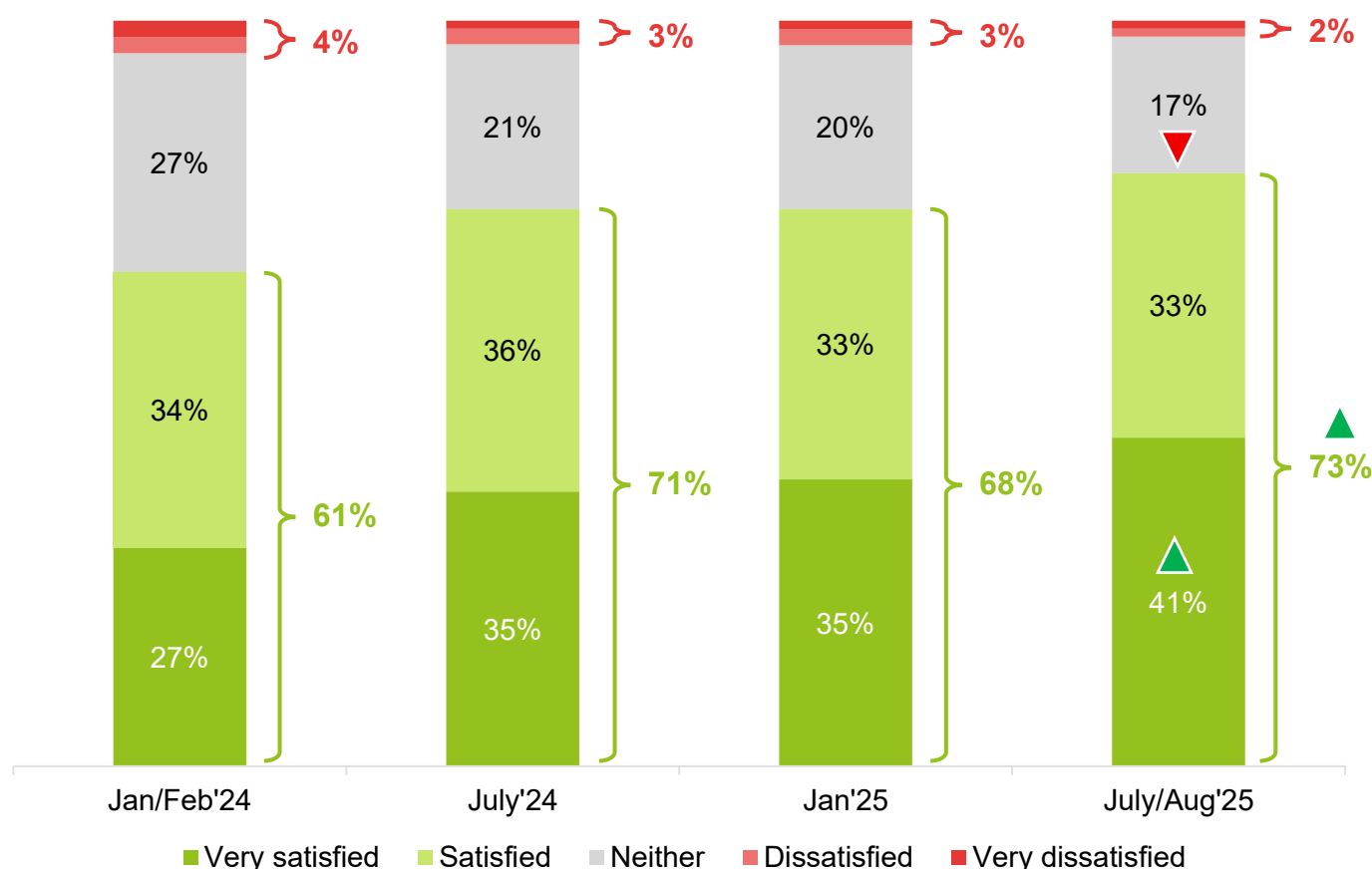


A8a: In the last 6 months, which of the following services have you received from the Priority Services Register? Base: Those on the Priority Services Register (1,530)

Satisfaction with the services received by being on the PSR

Among those who report that their household is on the PSR, three quarters (73%) are satisfied with the services they have received, which has increased from 68% reported in January 2025. This has mainly been driven by an increase in the proportion who reported being very satisfied, from 35% in January 2025 to 41% in July/August 2025.

Figure 57: Satisfaction with the services received by being on the PSR



A10. Please could you say how satisfied or dissatisfied you are overall with the services you have received by being on the Priority Services Register? Base: Those on the Priority Services Register: July/Aug'25 (1,530), Jan'25 (1,445), Jul'24 (1,340), Jan/Feb'24 (1,266). Data labels under 3% not shown. Unsure (7%) and prefer not to answer (1%) not shown here.

Despite high levels of satisfaction overall, households with someone who is currently pregnant, children under 5 or with adults over 65 record a lower level of satisfaction with services received on the PSR (70%). The same is true for respondents with a disability (70%), suggesting that groups who primarily benefit from the PSR (and who the PSR mainly serves) do not report as positive an experience.

When considering how customers who report being on the PSR impacts overall satisfaction, historically those on the PSR report a higher level of supplier satisfaction compared to the total. In July/August 2025, overall satisfaction by those on the PSR was 86%, which increased from 83% in January.

Switching

Overview of findings

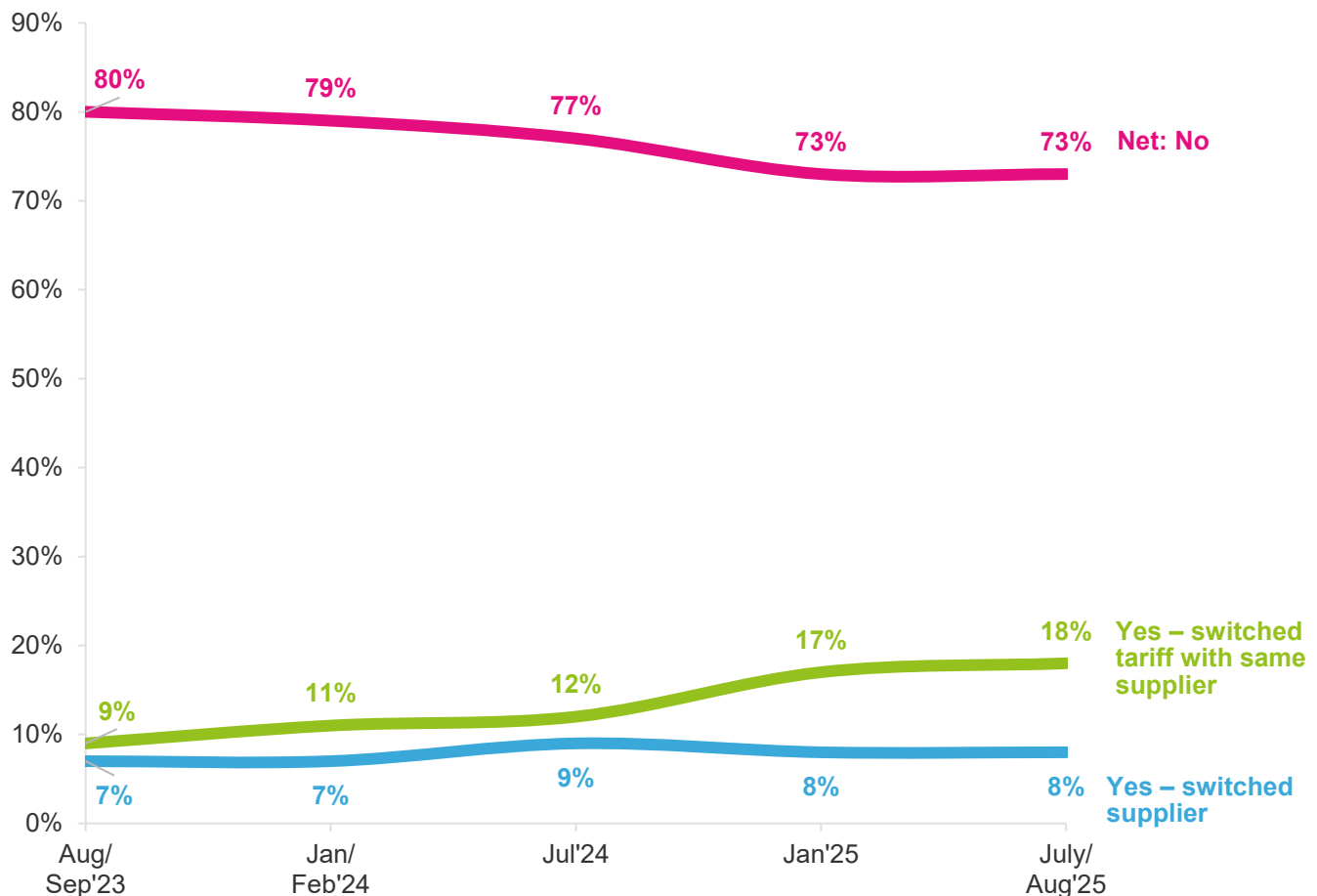
- **The uplift in the proportion who report having switched tariff with the same supplier in the last year seen in January 2025 has been maintained:** 18% of customers reported switching tariff with the same supplier in the past year, while a further 8% reported switching supplier. Three quarters (73%) of customers said they have not switched at all in the past year.
- **Those who have switched tariff with the same supplier continue to be more satisfied overall:** customers who have switched tariff with the same supplier have continued to report a higher level of overall satisfaction (89%) compared to those who have not switched (82%) – though the gap in satisfaction between the two is narrower than in past waves.

Switching behaviour in the last year

Three quarters (73%) of customers said they have not switched in the past 12 months, which remains in line with figures recorded in January. The proportion of customers who said they have switched tariff with the same supplier (18%) or switched supplier (8%) also remains in line with last wave.

When looking further back, switching behaviour has primarily been driven by those who have switched tariff with the same supplier, while the level of customers who switch supplier has remained relatively flat over the past two years.

Figure 58: Switching behaviour in the last year

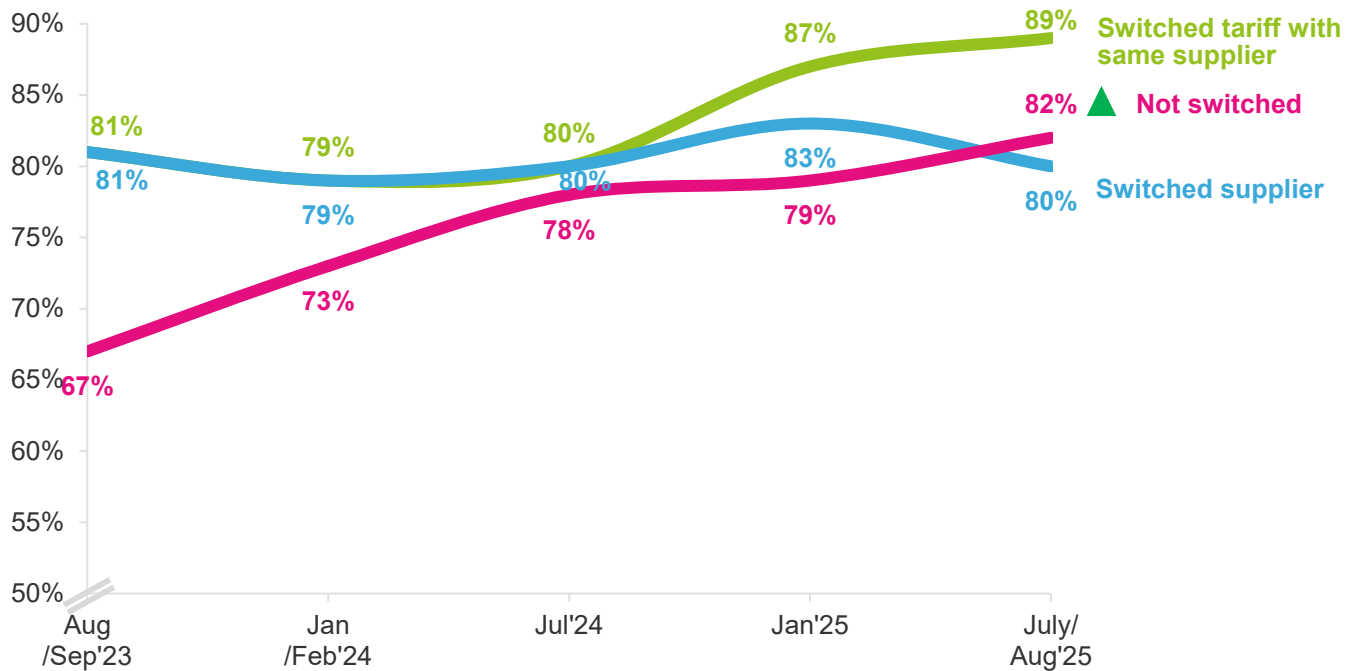


F1: In the past 12 months, have you chosen to either switch your energy supplier, or switch your energy tariff but stay with the same supplier? Base: All respondents: Jul/Aug'25 (3,790), Jan'25 (3,854), Jul'24 (3,750), Jan/Feb'24 (3,855), Aug/Sep'23 (3,742).

Customers who have switched tariff with the same supplier continue to report higher levels of overall satisfaction (89%) compared to those who have not switched (82%).

Since August/September 2023, the gap in overall satisfaction based on switching behaviour has continued to narrow. This could be attributed to customers reporting better experiences overall and switching behaviour becoming less of an influential factor towards overall satisfaction.

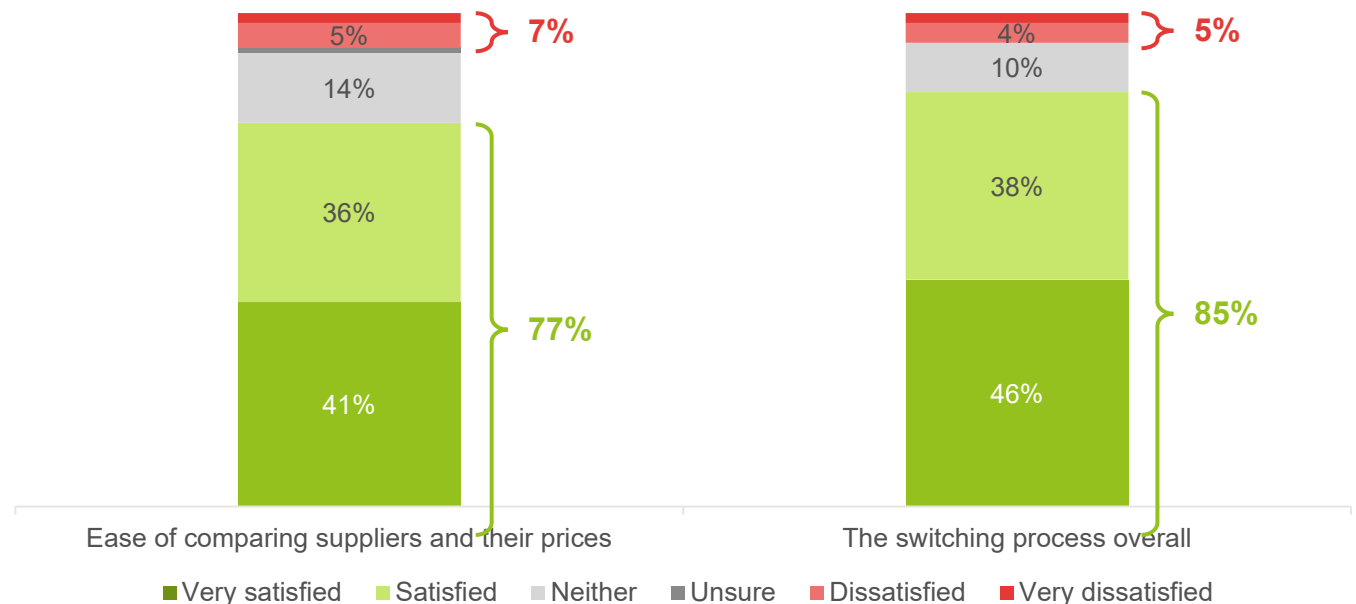
Figure 59: Overall satisfaction by switching actions



A5: Overall, how satisfied or dissatisfied are you with <A3/A4 SUPPLIER> as your supplier of <FUEL TYPE>? Base: Yes – switched supplier: July/Aug'25 (316), Yes – switched tariff: July/Aug'25 (663), No – not switched: July/Aug'25 (2,754)

For those who had switched supplier in the past year, the majority were satisfied with the ease of comparing suppliers and their prices (77%) and the switching process overall (85%). Both figures remain in line with previous waves.

Figure 60: Satisfaction with ease of comparing and switching process



F2. Using a scale of 1 to 5 please can you tell me how dissatisfied or satisfied you were with the following aspects of your switch to another supplier: Base: Those who switched energy supplier (316). Data labels <3% not shown. Unsure (1% for both statements) and prefer not to answer (0% for both statements) not shown here.

