Accent

Household Consumer Perceptions of the energy market

Wave 5: December 2019

Contents

Accent

Background and method

Background

- This report presents findings from a tracking survey commissioned jointly by Ofgem and Citizens Advice.
  - The Gas and Electricity Markets Authority (GEMA) is the regulator of Britain's gas and electricity markets, and its principal objective is to protect the interests of both current and future consumers. Ofgem carries out the day to day functions of GEMA.
  - Citizens Advice helps millions of people every year to find a way forward, across all sectors, whatever their problems. This informs its role as the statutory energy consumer advocate, fighting for the best outcomes for current and future consumers.

- The tracker is a representative survey of domestic energy bill-payers and provides Ofgem and Citizens Advice with ongoing measures of consumer engagement in and experiences of the energy market.

Methodology

- Data was collected using a mixed-mode survey of 3,209 domestic energy bill-payers in Great Britain (GB). Fieldwork was carried out using:
  - An Online survey via a commercial online panel (n = 2,909)
  - A Face-to-face in-home survey with the digitally excluded population (n = 300). Participants were considered to be digitally excluded if they did not have access to the internet or had not used the internet in the previous six months.
- All participants were responsible (solely or jointly) for the energy bills in their household or for choosing their energy supplier.
- The survey used quotas to achieve a sample representative of the GB bill-payer population. Quotas were set on age, gender, social grade and region. Data were weighted to the known profile of the GB population. Quotas (other than gender) were based on census Household Reference Person (HRP)*, as a proxy for bill-payer.

* https://www.nomisweb.co.uk/datasets/st067

Fieldwork Dates

- Fieldwork dates for each of the five waves of the survey completed are indicated below:

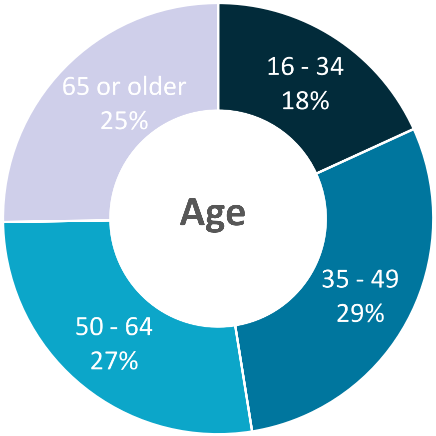
Fieldwork	Wave 1 ('Q4 2018')	Wave 2 ('Q1 2019')	Wave 3 ('Q2 2019')	Wave 4 ('Q3 2019')	Wave 5 ('Q4 2019')
Online	24th October – 11th November	29th January – 6th February	26th March - 15th April 2019	3rd July - 17th July 2019	1st – 23rd October 2019
Face-to-Face	24th October – 13th November	31st January – 17th February	1st – 16th April 2019	1st July – 23rd July 2019	3rd – 17th October 2019

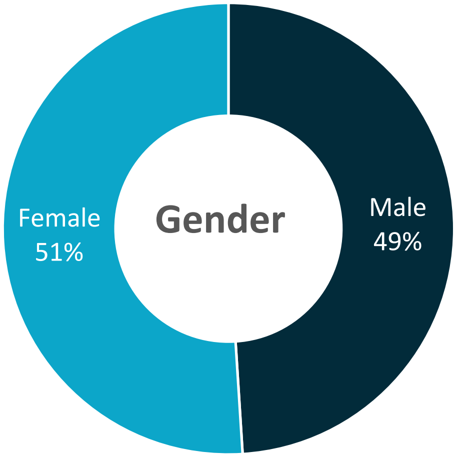
Comparisons between survey waves

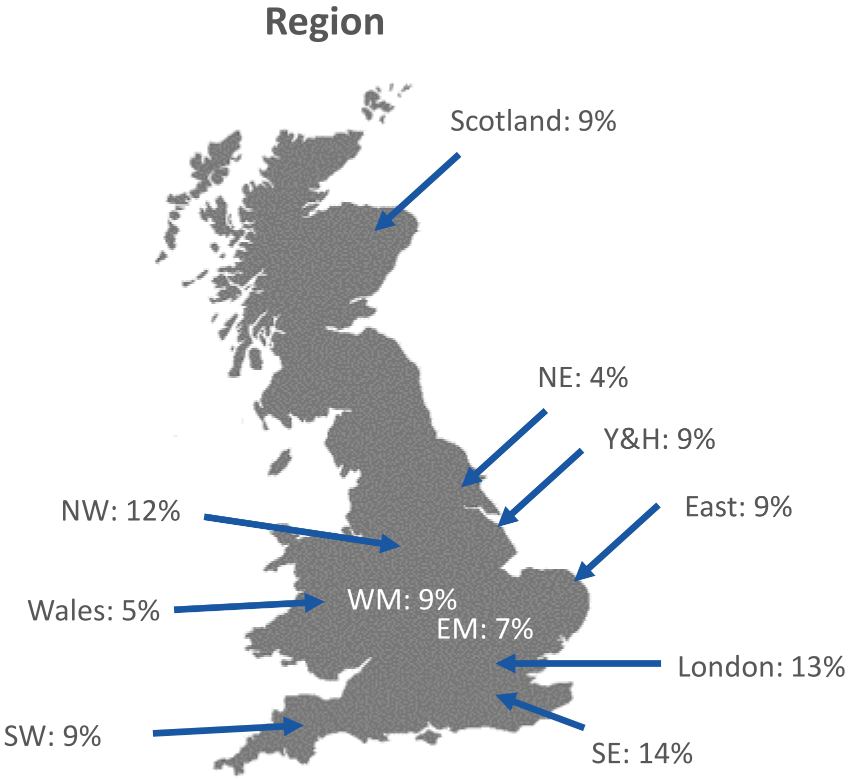
- This report presents results for the fifth tracking wave (Q4 2019)
- As the survey involved sampling a selection, rather than the whole population, of energy consumers, confidence intervals apply to the results. These confidence intervals indicate, for a given sample size and a given survey result, the degree of confidence we can have that the survey result is real and not due to random chance. For the total sample on which these results are based (n=3,209), there is a confidence interval of +/-2% (i.e. a survey result of 50% could lie between 48% and 52%).
- Confidence intervals also apply when comparing results between waves. Where there are statistically significant differences in findings to previous waves (i.e. we have statistical confidence that a real change has occurred), these are indicated. Where only wave three results are shown, there are no statistically significant differences in findings from previous waves.
- All measures of statistical significance have been tested at the 95% confidence level.

Sample profile

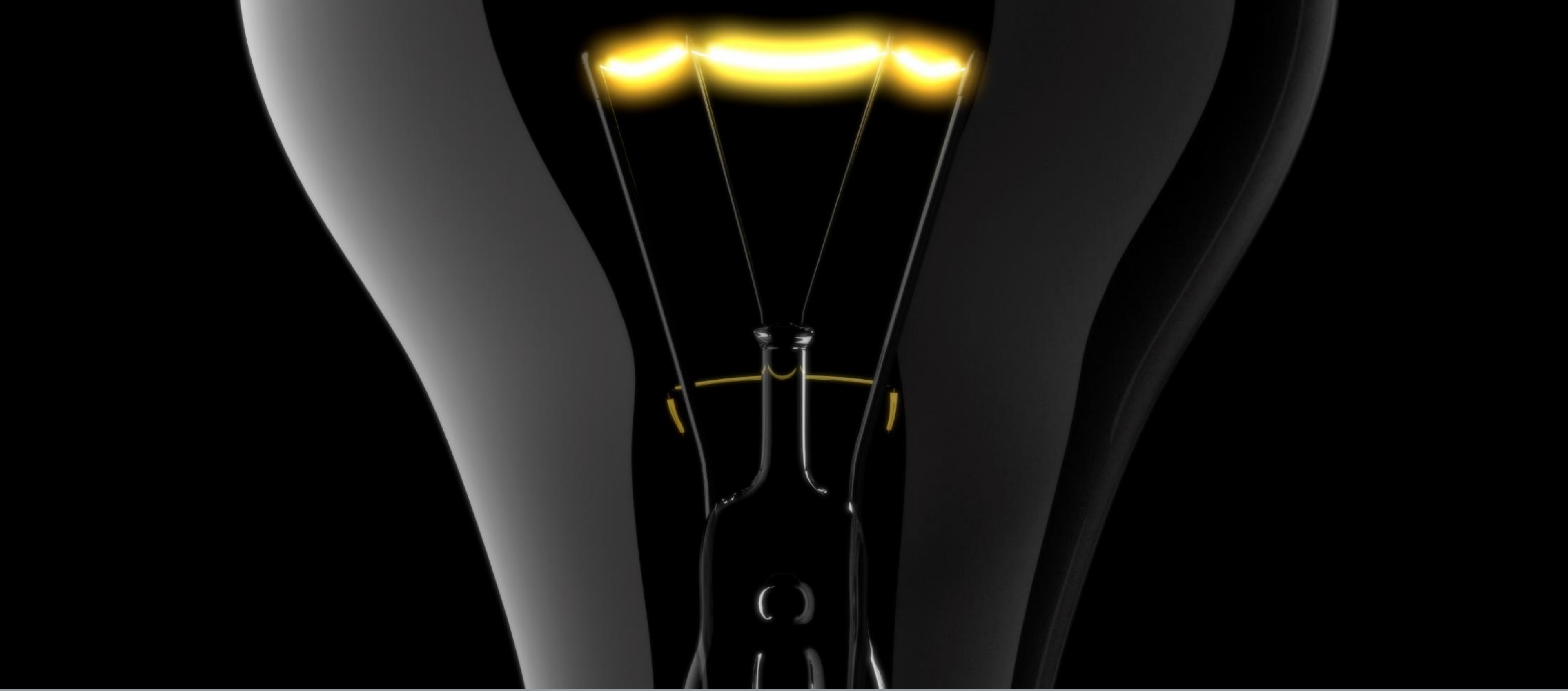
Sample profile







Base: All Participants (3,209)



Changes in consumer engagement

Accent

Changes in consumer engagement

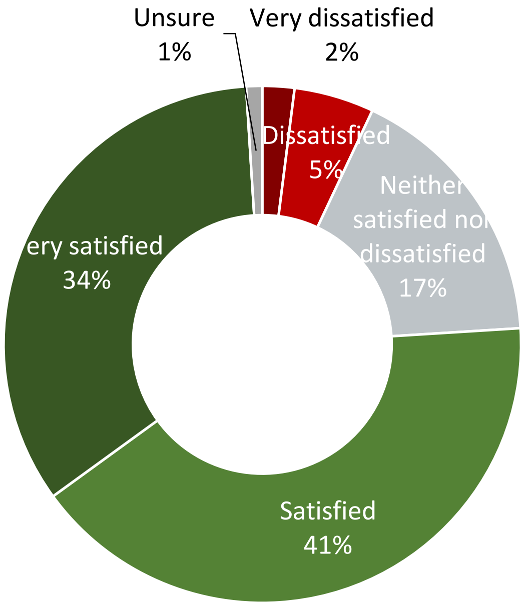
There have been a number of changes in consumer engagement this quarter

- Fewer consumers contacting their suppliers did so by phone, and satisfaction with the service received over the phone has declined
- Of recent contact with suppliers, fewer made contact to query a bill, falling back to levels seen in Q1 2019 and Q4 2018
- In contrast, customer contact relating to complaints and changing payment method have increased
- Of complaints made to suppliers, a higher proportion have been about discounts not being applied and managing payments. Complaints this quarter are less likely to be about installing or moving a smart meter
- Consumer satisfaction with the outcome of complaints has declined compared to previous quarters
- Consumers are less likely to recall receiving information from their supplier on a number of issues
- There has been an increase in the proportion of consumers switching supplier and an increase in recent switching
- A higher proportion of consumers would use price comparison websites and advice websites to compare suppliers than last quarter

Satisfaction with supplier

Overall satisfaction with supplier

75% are satisfied with supplier (steady)



- As with at least the previous three quarters, the following groups of consumers have higher satisfaction:
  - Those on a fixed tariff (78% vs 74% SVT)
  - Paying by direct debit (78%) vs PPM* (67%) and Standard credit (66%)
  - Those who've ever switched supplier or tariff (77%) vs never switched (70%)
  - Consumers aged 65+ (81%) vs aged 16-64 (73%)

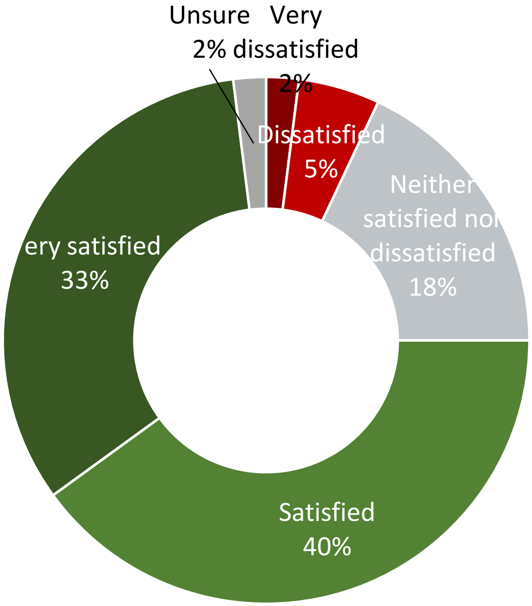
* PPM = Pre-payment meter

Overall, how satisfied or dissatisfied are you with (...) as your supplier of (gas/electricity/gas and electricity)?

Base: All Participants (3,209)

Satisfaction with customer service

73% are satisfied with customer service



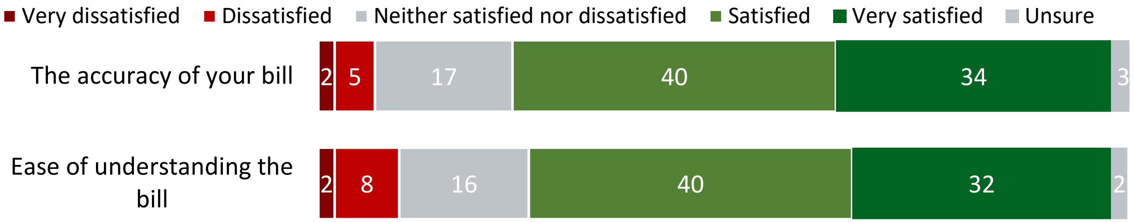
- Higher satisfaction among:
  - Direct debit (75%) vs standard credit (64%) and PPM (66%)
  - Digitally excluded (86%) vs online (71%)
  - Aged 65+ (79%) vs aged 16-64 (70%)
- Of these groups, the following have most consistently shown higher satisfaction
  - Aged 65+ (all 5 quarters)
  - Those paying by direct debit (Q1, Q2, Q3, Q4 2019)

Overall, how dissatisfied or satisfied are you with the customer service you have received from your energy supplier?

Base: All Participants (3,209)

Satisfaction with bill

Over 70% are satisfied with accuracy and ease of understanding bills



- '% satisfied' with ease of understanding is lower among those:
  - Dissatisfied overall with supplier (35%) vs satisfied (82%)
  - Unaware or don't understand the price cap (70%) vs aware of and understand it (81%)
  - Have a disability (67%) vs no disability (74%)

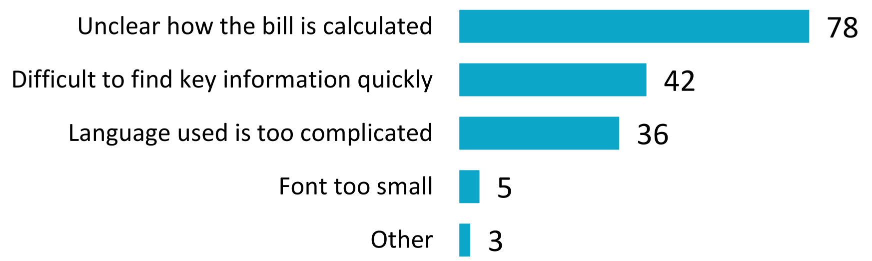
- Each of these groups has had lower satisfaction over all or part of the last 5 quarters:
  - Dissatisfied overall with supplier (all 5 quarters)
  - Have a smart meter (Q2, Q3, Q4 2019)
  - Have a disability (Q4 2018, Q2, Q3, Q4 2019)

Please can you tell me how dissatisfied or satisfied you are with the following aspects of your energy supplier`s bills?

Base: Those who pay for their energy with a regular direct debit or standing order or with cash/cheque/credit card/BACS/App (2,701)

Reasons for dissatisfaction with ease of understanding the bill

As seen in previous quarters, clarity of calculation of bill continues to be the most common problem



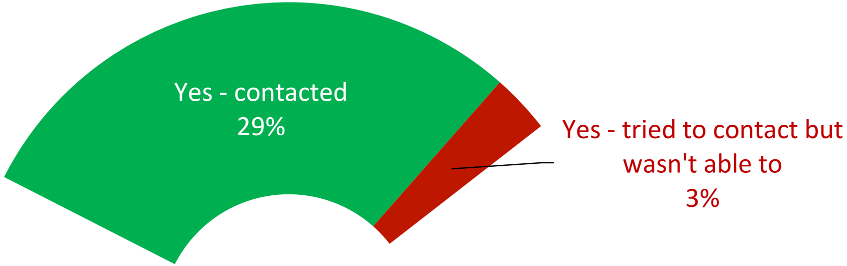
Reason for dissatisfaction	Groups more likely to experience this problem
Difficult to find key information quickly	• Those digitally included (45%) vs those digitally excluded (16%) • ABC1 (52%) vs C2DE (29%)
Unclear how the bill is calculated	• Those who have never switched (89%) vs those who have ever switched tariff (71%)

Why are you very dissatisfied/dissatisfied with the ease of understanding your bill from your energy supplier? (%)
Base: Those who are dissatisfied with the ease of understanding their bill from their energy supplier (269)

Accent

Recent contact with supplier (last 3 months)

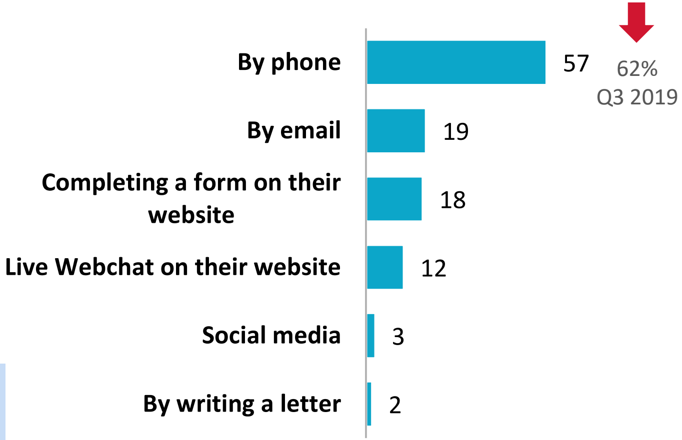
Similar to previous quarters, 29% tried to contact their supplier in last three months



- Those most likely to attempt to contact are:
  - Dissatisfied customers (47%) vs satisfied (27%)
  - Have ever switched supplier (32%) vs those who have not (24%)
  - Aged 16-34 (36%) vs aged 50+ (26%)
  - Those with internet access (31%) vs those offline (13%)

Have you contacted, or tried to contact, your energy supplier within the last 3 months?
Base: All Participants (3,209)

Contact method

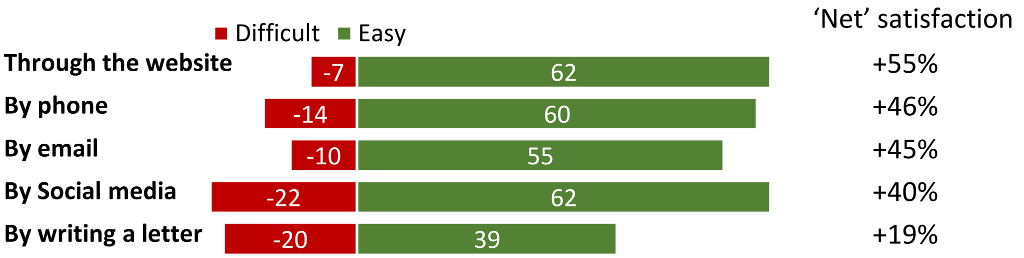


How did you (try to) make contact with your energy supplier on that last occasion? (%)
Base: All who contacted or have tried to make contact in the last 3 months (1,006)

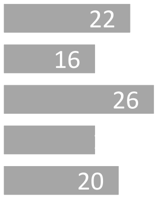
Accent

Ease of making last contact with supplier <u>via preferred channel</u>

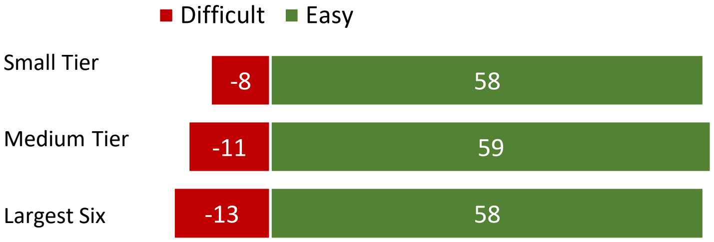
Customers are asked how easy it is to contract supplier *by their preferred channel*. The chart shows perceived ease of contact if using preferred channel.



Have not tried to contact in this way



More customers of large suppliers find it difficult to contact their supplier



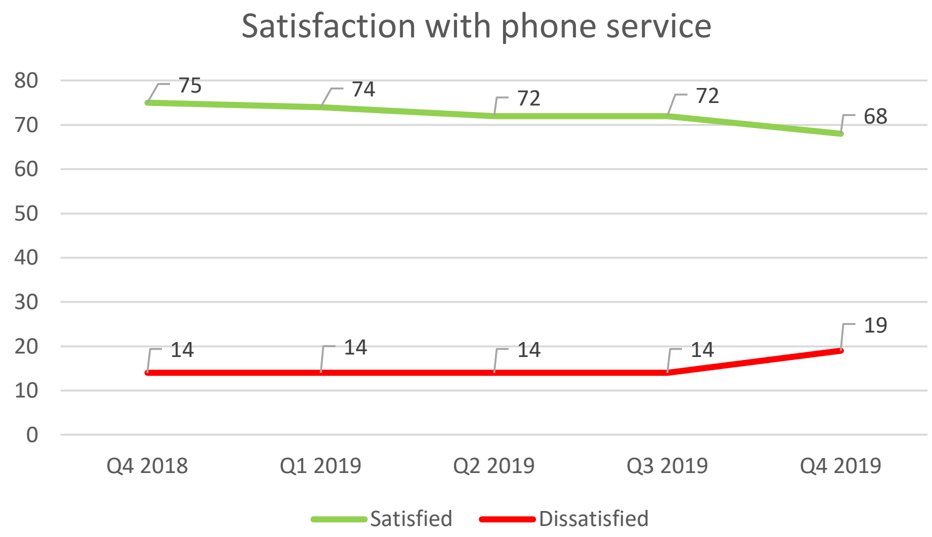
N.B. Neutral and 'Don't know' responses are not shown

Thinking about the last time you tried to contact your energy supplier how easy or difficult did you find it to contact them in this way? Base: All Participants (3,209)

Accent

Satisfaction with service received by phone

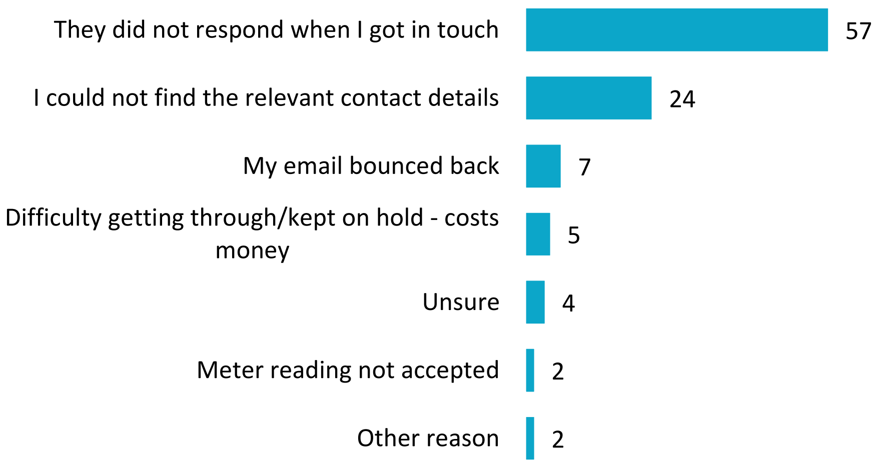
Satisfaction with the service received over the phone has declined



Please can you tell me how dissatisfied or satisfied you were with the service received by phone?
Base: All who contacted or tried to contact their energy supplier by phone (Q4 2018: 660; Q1 2019: 626; Q2 2019: 665; Q3 2019: 651; Q4 2019: 573)

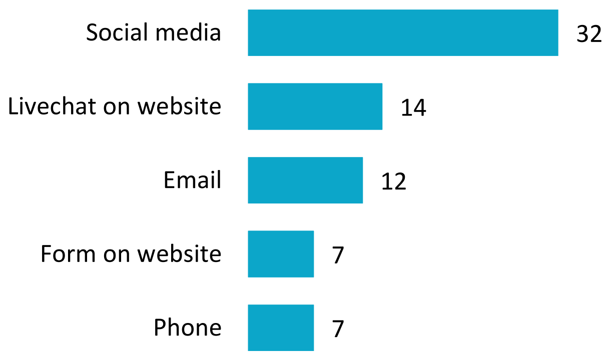
Reasons for failed contact with supplier

Reasons for failed contact



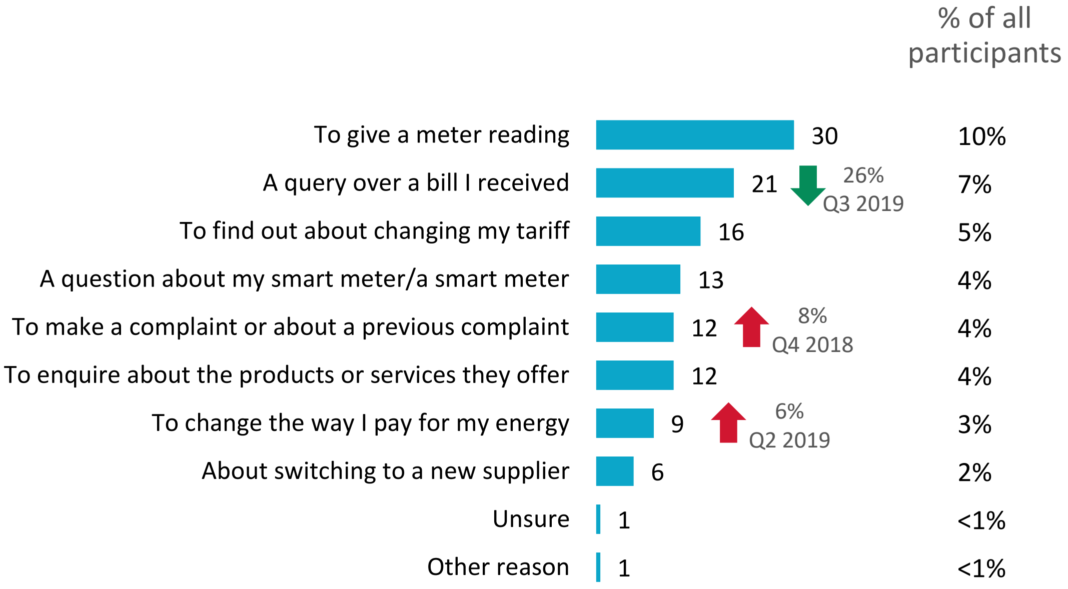
Thinking of the last time you tried to make contact with your energy supplier, why were you not able to? (%)
Base: Those who failed to contact their energy supplier (78)

Least successful contact channels
(% trying to contact but failing)



Have you contacted, or tried to contact, your energy supplier within the last 3 months?
Base: All who contacted or have tried to make contact (Phone 575, Webchat 118, email 190, social media 30, website form 180)

Reasons for last contacting supplier



- Differences by subgroup who contacted their supplier:
  - 38% without a Smart Meter gave a meter reading
  - 26% with a Smart Meter asked a question about it
  - 28% who switched tariff in last 12 months contacted to find out about changing tariff
  - 23% of those aged 16-34 got in contact about a complaint

- **Fewer** made contact to query a bill: Q4 2019 (21%) vs Q3 2019 (26%) and Q2 2019 (25%) – this has fallen back to levels seen in Q1 2019 and Q4 2018
- Contact relating to complaints and changing payment method have **increased**

* Contact relating to smart meters will include all forms of contact (e.g. installations, ongoing use, changing smart meter etc)

Thinking of the last time you (made/tried to make) contact with your energy supplier, what was it about? (%)

Base: Those who contacted / tried to contact their energy supplier (1,006)

Complaints

Complaints to suppliers

12% of recent contacts with suppliers were relating to a complaint

- This equates to 4% of all consumers complaining the last time they contacted their supplier
- The groups more likely to have complained:
  - Dissatisfied overall with their supplier (37%) vs satisfied (7%) or neutral (12%)
  - Those using standard credit (18%) vs those using direct debit (10%)
  - Younger consumers: 16-34 (23%)

An **increase** in consumers complaining about:

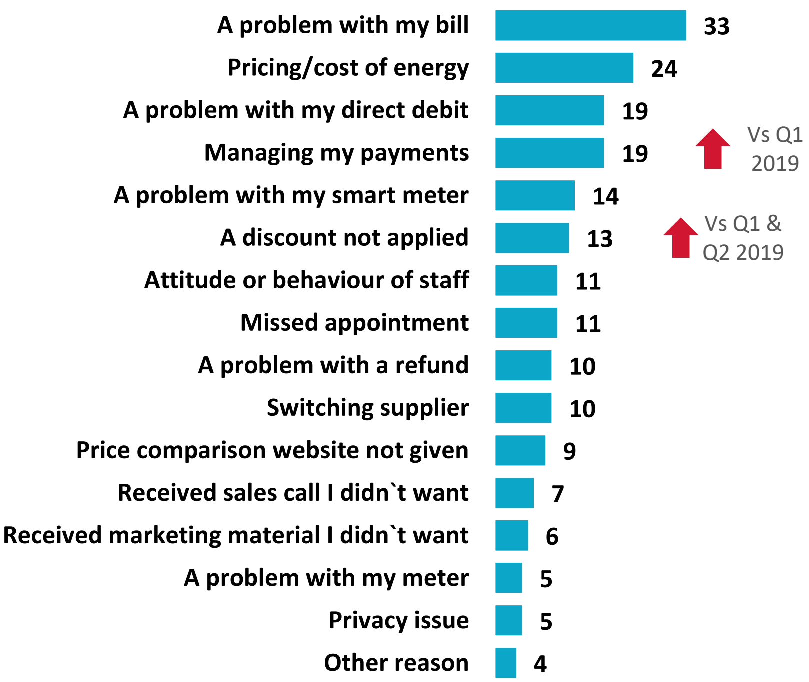
- A discount not being applied: Q4 2019 (13%) and Q3 2019 (17%) vs Q2 2019 (5%) and Q1 2019 (5%)
- Managing payments: Q4 2019 (19%) vs Q1 2019 (8%)

Fewer complaints about installing or removing a meter:

- Q4 2019 (2%) vs Q2 2019 (9%), Q1 2019 (10%) and Q4 2018 (9%)

Base: Those who contacted or tried to contact their energy supplier (1,006)

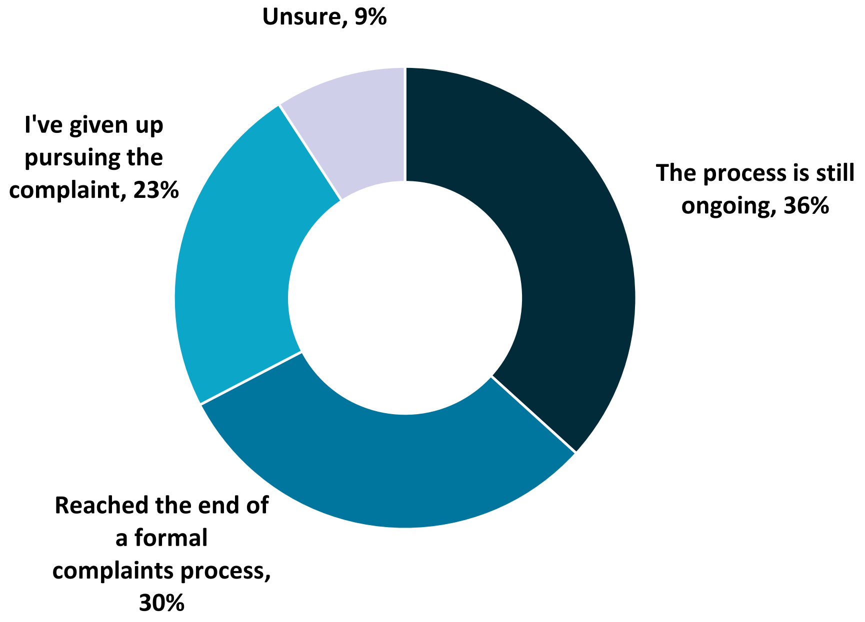
Reason for complaints (%)



Base: Those who contacted their energy supplier to make a complaint (113)

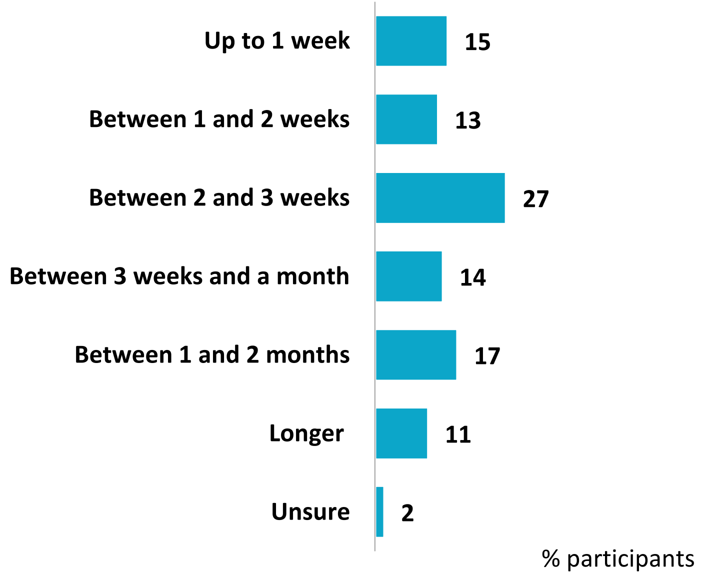
Stage of complaint and time taken to process (Past 3 months)

30% of complaints have been completed



What stage are you at with the complaint process?
Base: Those who contacted their energy supplier to make a complaint (113)

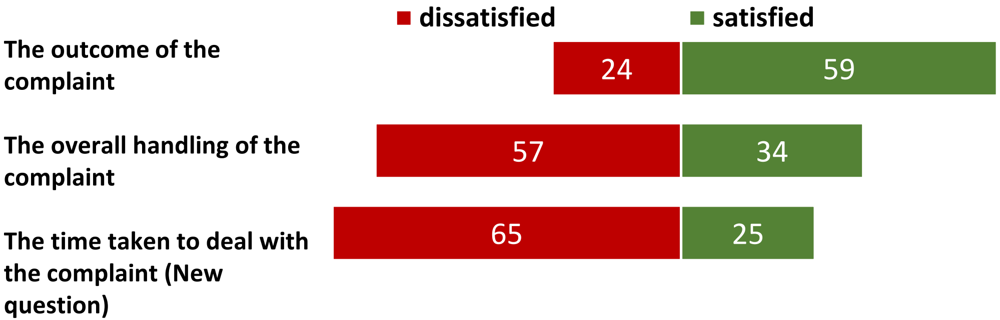
28% of complaints have been live for more than a month



Roughly, how long did the complaint process take from beginning to end?
Base: Those who knew the stage of their complaint process (102)

Satisfaction with the complaints process

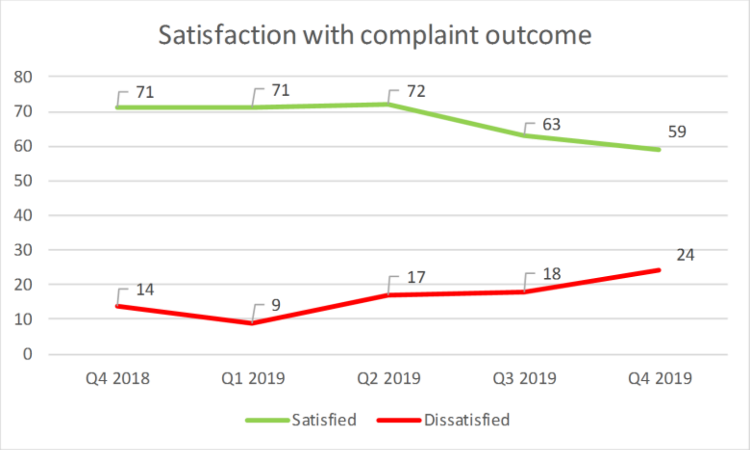
Satisfaction with complaints process



N.B. Neutral and 'Don't know' responses are not shown

Satisfaction with the outcome of a complaint has **declined**:

- Q4 2019 59% satisfied vs Q4 2018 71%



Please can you tell me how satisfied or dissatisfied you are with the following aspects of your complaint.

Base: Those who contacted their energy supplier to make a complaint (113); Outcome reached (34)

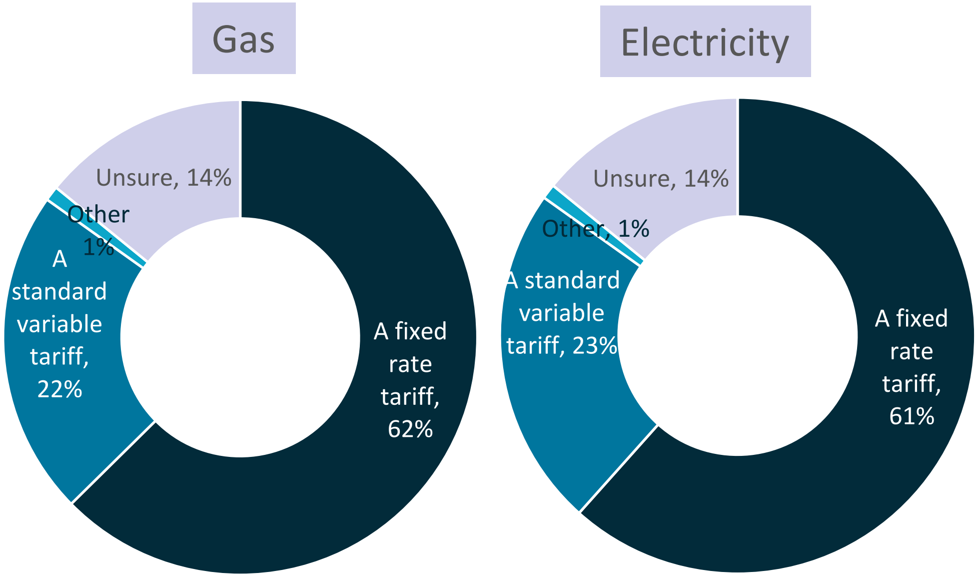
Accent

Tariffs and information provision

Accent

Tariff type

For Gas and for Electricity, 84% know what tariff type they are on



Those who are unsure are most likely to be:

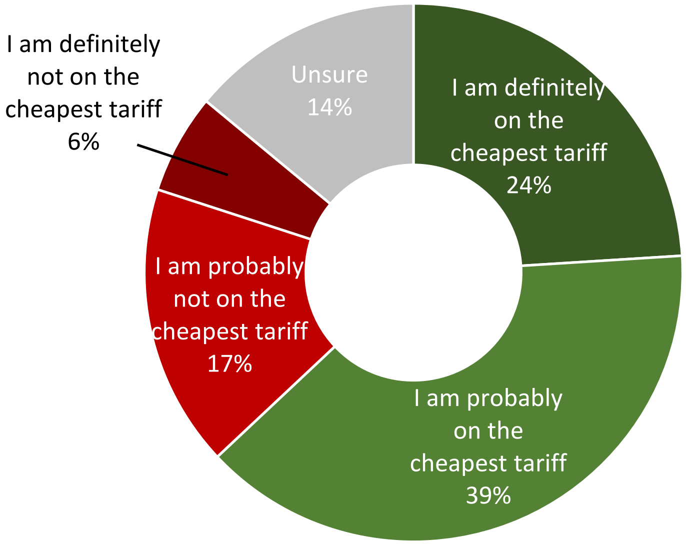
- Unaware or don't understand the price cap
- Aged 35-49
- PPM
- Switched supplier
- Digitally excluded
- Have a disability
- Lower social grades

Measure	Group	Gas	Electricity
Price cap	Unaware	17%	16%
	Aware	4%	4%
Age	16-34	12%	12%
	35-49	19%	19%
Payment Method	Direct Debit	10%	10%
	PPM	35%	33%
	Standard Credit	15%	14%
Switched suppliers	Yes	11%	11%
	No	20%	20%
Online/Offline	Online	14%	13%
	Digitally Excluded	23%	25%
Disability	Disability	21%	20%
	No disability	12%	11%
SEG	ABC1	10%	9%
	C2DE	20%	20%

What kind of gas / electricity tariff are you on?
Base: Gas (2,735), Electricity (3,073)

Cheapness of tariff

63% believe they are on their supplier's cheapest tariff



To what extent do you feel you are on the cheapest tariffs offered by your energy supplier?
Base: All Participants (3,209)

- Those with suppliers in the Small Tier were the most likely to feel they're on the cheapest tariff:
  - Small Tier (76%)
  - Medium Tier (73%)
  - Largest Six suppliers (56%)
- Consumers more likely to believe they're on the cheapest tariff:
  - Consumers who switched supplier in last 12 months (83%)
  - Ever switched supplier (74%)
  - Ever switched tariff with same supplier (72%)
  - On a fixed tariff (75%)
  - Aware of price cap (74%)
  - Satisfied with supplier (70%)
  - Pay by Direct Debit (69%)
  - Aged 65+ (67%)
  - Online consumers (64%)

Fewer recall receiving information from their supplier on a number of issues

Information received

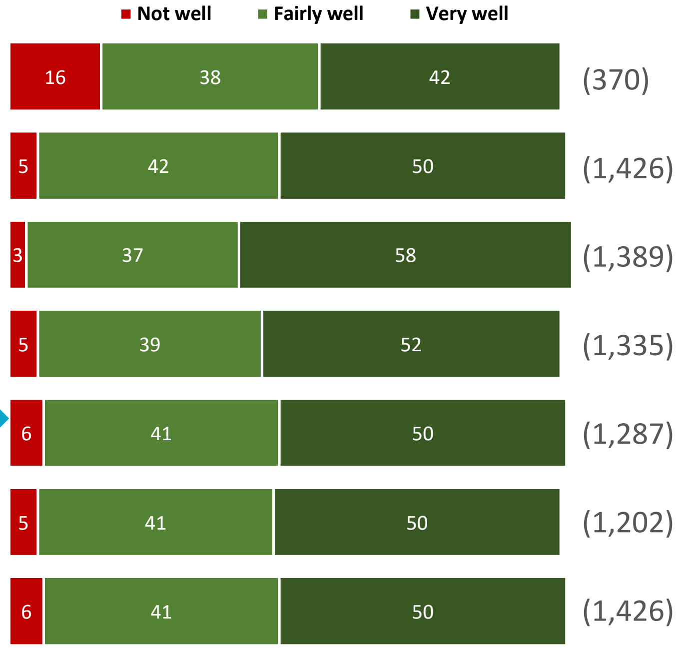
Proportion saying recall receiving

- Notification of a price increase 49% — **W5 (49%) and W4 (50%) lower than W3 (65%) and W1 (60%)**
- The choice of energy tariffs they offer 45% — **W5 (45%) is lower than W3 (47%)**
- What to do in an emergency 43% — **W5 (43%) and W4 (43%) lower than W3 (46%) and W2 (46%)**
- How to make a complaint 42% — **W5 (42%) lower than W3 (45%) and W1 (45%)**
- What to do if you want to change your energy tariff 40% — **W5 (40%) and W4 (40%) lower than W3 (43%) and W1 (44%)**
- What to do if you need assistance with paying your energy bills 38% — **W5 (38%) and W4 (38%) lower than W3 (41%) and W1 (41%)**
- What information you need to compare energy prices 32% — **W5 (32%) lower than W3 (35%) and W1 (35%)**

Do you recall if your energy supplier has given you information about any of the following in the last six months? Base: All participants (3,209), apart from 'Notification of price increase': All on SVT (805)

How well information met needs

The proportion saying information on how to change energy tariff was not useful increased from 4% in Q3 2019 to 6% in Q4 2019.



How well did the information you received meet your needs? Bases: those receiving information (individual bases are in brackets)

Accent

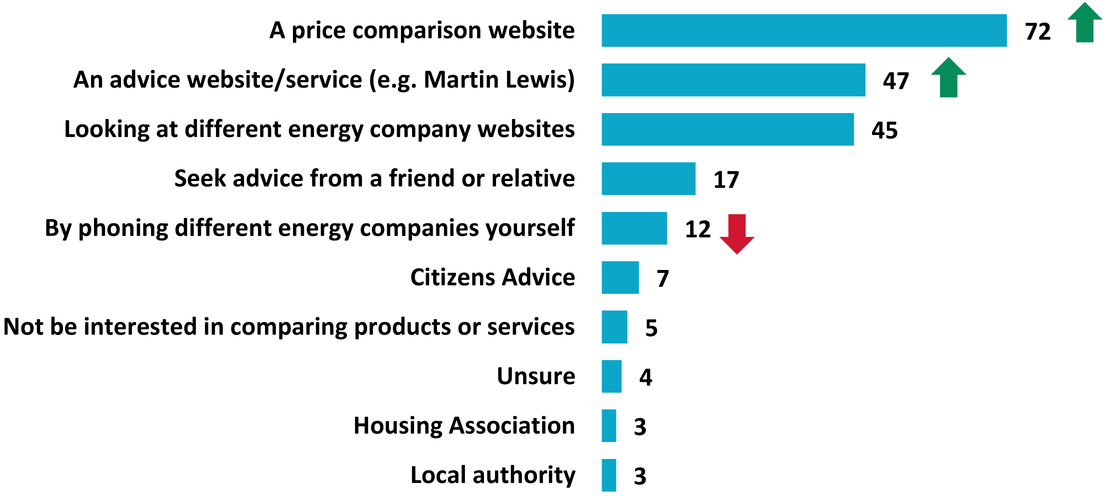
Switching

Information that would be used to compare suppliers

- Nearly three quarters (**72%**) would use a price comparison website (PCW) to compare suppliers – an increase compared to previous quarters (68% in all previous waves)
- Likely use of advice website is also up (47% vs 42% Q3 2019)
- Directly calling suppliers has fallen (12% vs 14% in Q1 2019 and Q4 2018)

Consumers more likely to use a PCW are:

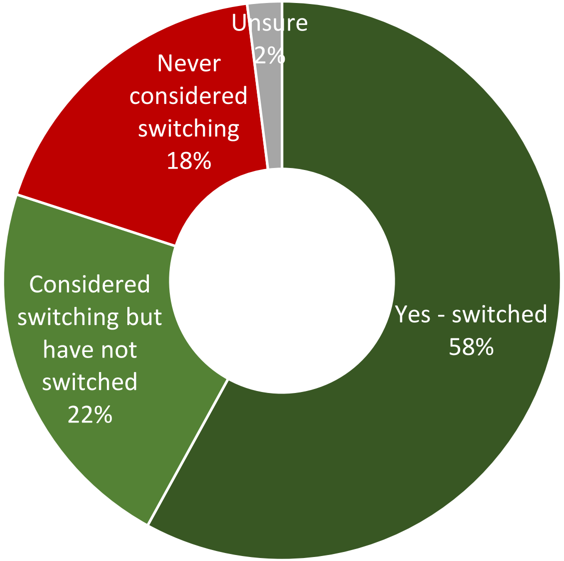
- Ever switched supplier (81%)
- SEG ABC1 (78%)
- Aged 50-64 (78%)
- On a fixed tariff (77%)
- Pay by direct debit (75%)



Where would you go to find information that would allow you to compare the products and services offered by different companies? (%)
Base: All Participants (3,209)

Incidence of switching energy supplier

Rates of switching are up – **58%** have ever switched supplier



Proportion switching lowest for:

- Digitally excluded (32%)
- Paying by standard credit (33%) or PPM (40%)
- Aged 16-34 (44%)
- Customers of the largest six suppliers (43%)
- C2DE (49%)
- Unaware or don't understand the price cap (55%)

For the first time since Q4 2018, an **increase** is seen in the proportion of customers switching:

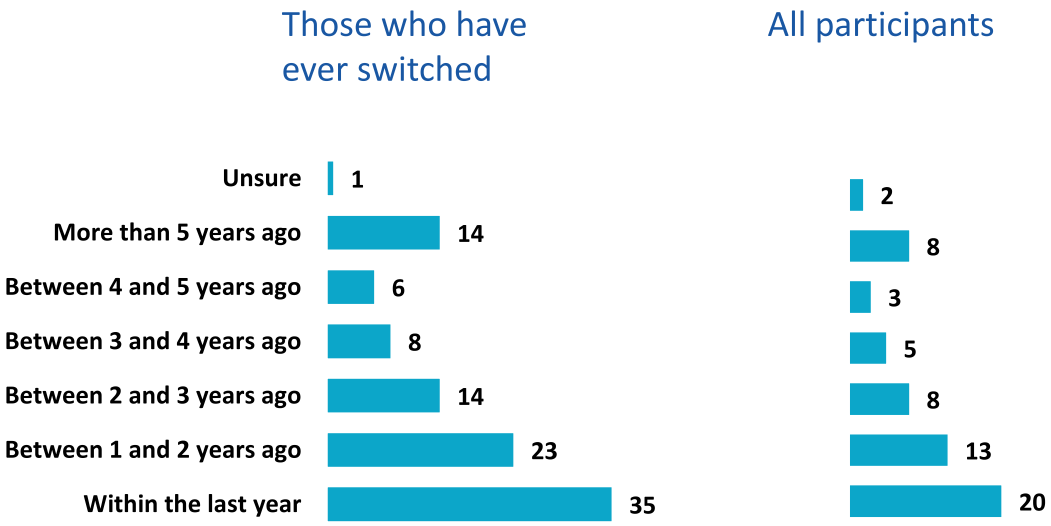
- Q4 2019 (58%) vs 52% Q1-Q3 2019 and 53% Q4 2018

Have you ever switched or considered switching energy supplier?
Base: All Participants (3,209)

Last occasion switched supplier

35% of those who have ***ever*** switched supplier did so in the last year

This equates to 20% of all consumers switching in the last year – an increase from the previous quarter



Recent switching has increased

People switching in the last year:

- Q4 2019 20% vs Q2 2019 17% and Q1 2019 18%

People switching between 1 and 2 years ago:

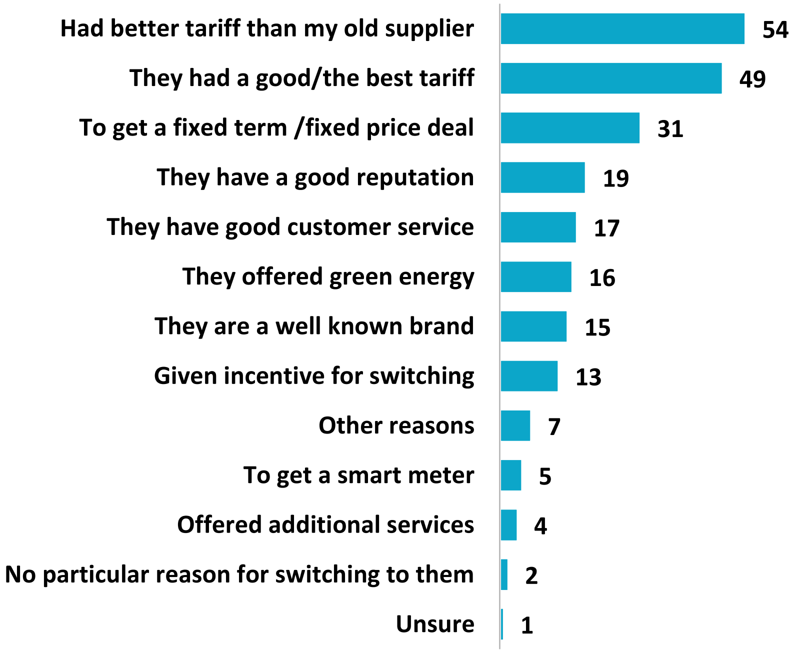
- Q4 2019 13% vs Q1 2019 11% and Q4 2018 11%

When was the last time you switched energy supplier? (%)
Base: Those who have ever switched (1,847); all Participants (3,209)

Accent

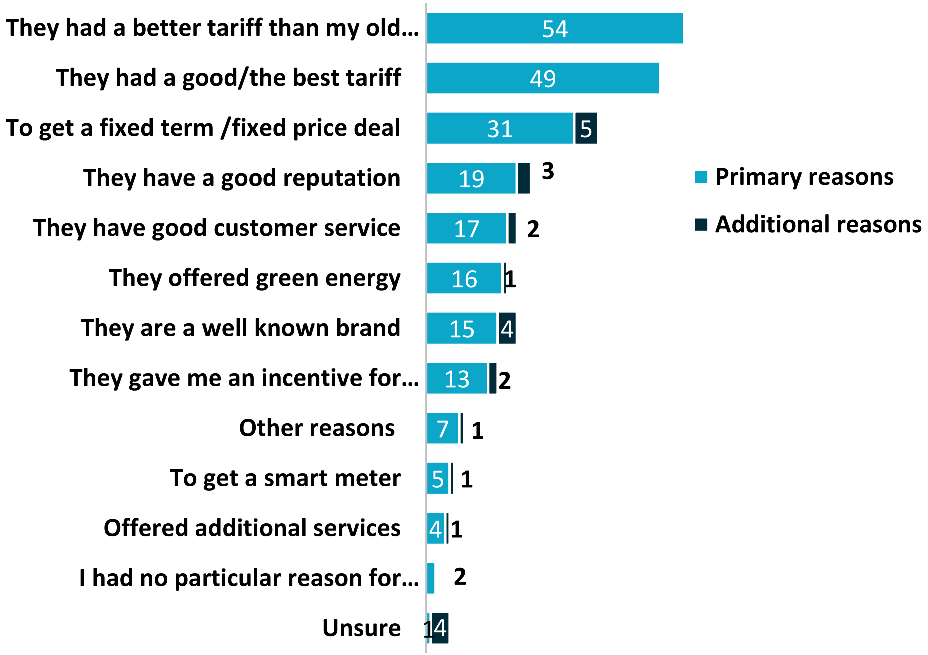
Reasons for choosing supplier

The key reasons for selecting a supplier are cost related



Once you had made the decision to switch to another energy supplier, what were the main reasons you chose the company you went with?
Base: Those who have ever switched (1,847)

Even when prompting with non-cost reasons, service, reputation, incentives and green tariffs are secondary considerations

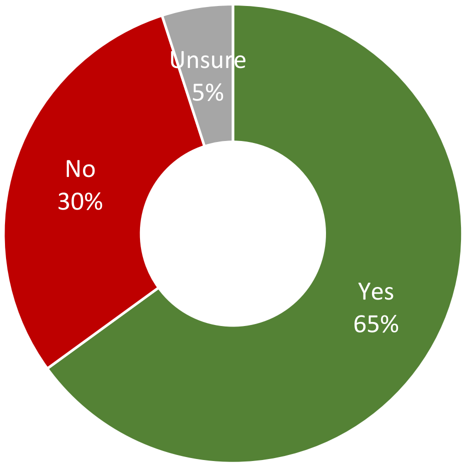


Were there any other reasons for selecting them apart from the tariff?
Base: Those who have ever switched (1,847). Dark blue shows those who only selected financial reasons when first asked (715)

Accent

Use of Price Comparison Websites

65% who switched used a Price Comparison Website



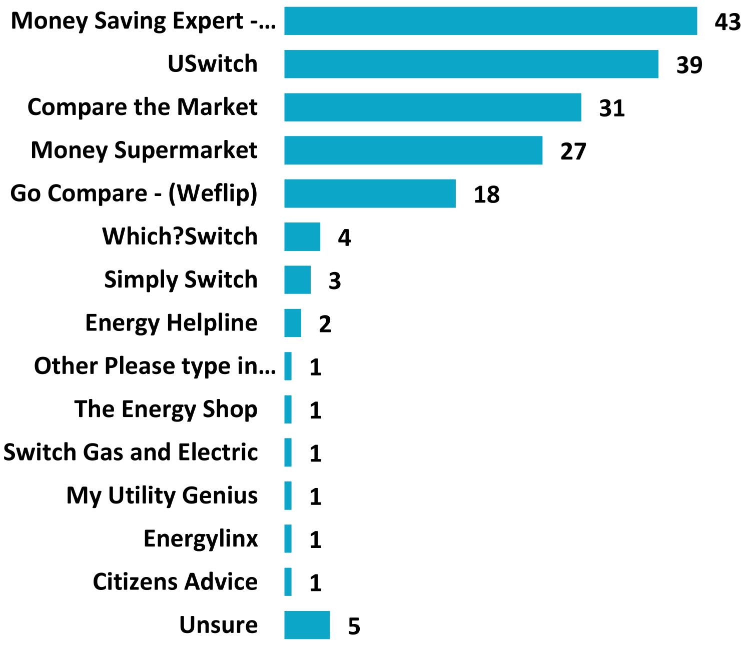
Proportion using PCWs lowest for:

- Digitally excluded (5%)
- PPM (40%) and standard credit (50%)
- Aged 65+ (56%)
- C2DE (56%)
- Have a disability (54%)
- Those with a Smart Meter (61%)
- Those with a SVT (61%)

Did you use a price comparison website to help you switch energy supplier?
Base: Those who have ever switched supplier (1,847)

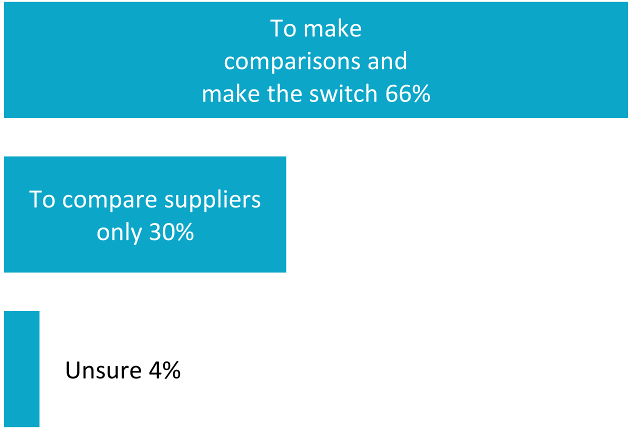
* PCW = Price Comparison Website

Price Comparison Websites (PCWs) used



Which price comparison websites did you use? (%)
Base: All who used price comparison website (1,181)

66% of those using PCWs used them to make the switch



Did you use the price comparison website only to compare suppliers or did you also use it to make the switch?
Base: Those who used a price comparison website to help them switch energy supplier (1,181)

Satisfaction with switching experience

High satisfaction with switching process

N.B. Neutral and 'Don't know' responses are not shown

Satisfaction with switching is higher for those who used a PCW

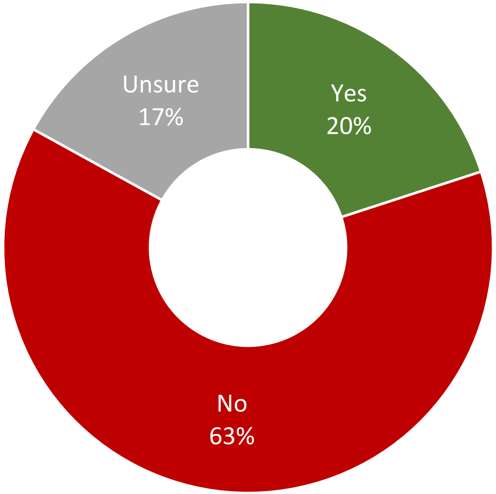
	Satisfied with ease of comparing suppliers and prices	Satisfied with the switching process overall
Did not use PCW	62%	77%
Used PCW only to compare suppliers	91%	90%
Used PCW to complete switch	93%	93%

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 their energy supplier (1,847), Did not use PCW (569), Used PCW only to compare suppliers (350), Used PCW to complete switch (779)

Accent

Consumers currently considering switching

20% currently thinking of switching supplier



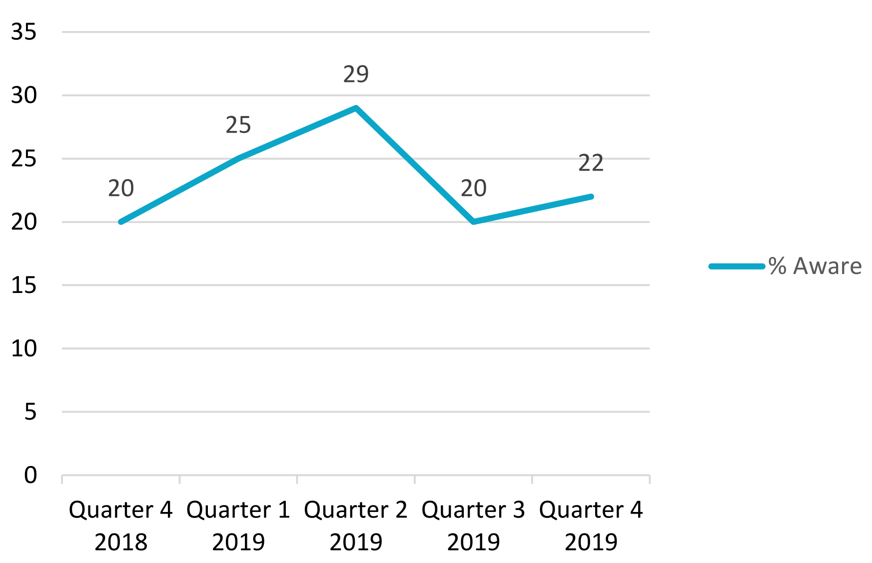
Are you currently considering changing your energy supplier?
Base: All Participants (3,209)

- The proportion considering switching is highest for:
  - Dissatisfied customers (62%)
  - On a mixed tariff (34%)
  - Aged 16-34 (30%)
  - Small Tier customers (24%)
  - ABC1 (22%)
- Little difference by whether switched before (20% switched v 23% never switched)

The energy price cap

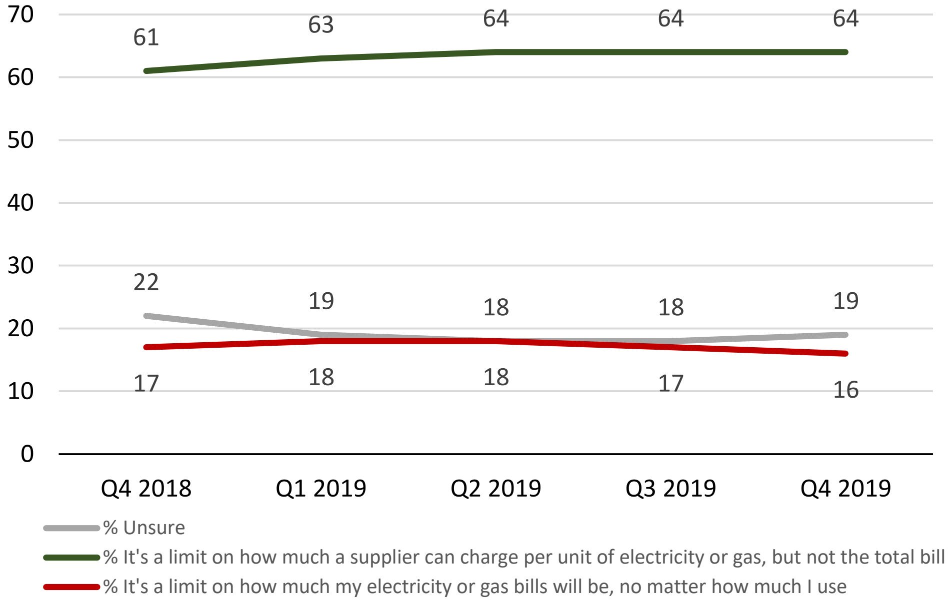
Awareness of the price cap

There has been a slight increase in the awareness of the price cap in Q4 2019, but still lower than peak in Q2 2019



Before today, had you heard about a new energy price cap known as a `Default Tariff Cap'? (%) Base: All Participants (Q1 2019: 3,200; Q2 2019: 3,236; Q3 2019: 3,206; Q4 2019: 3,209)

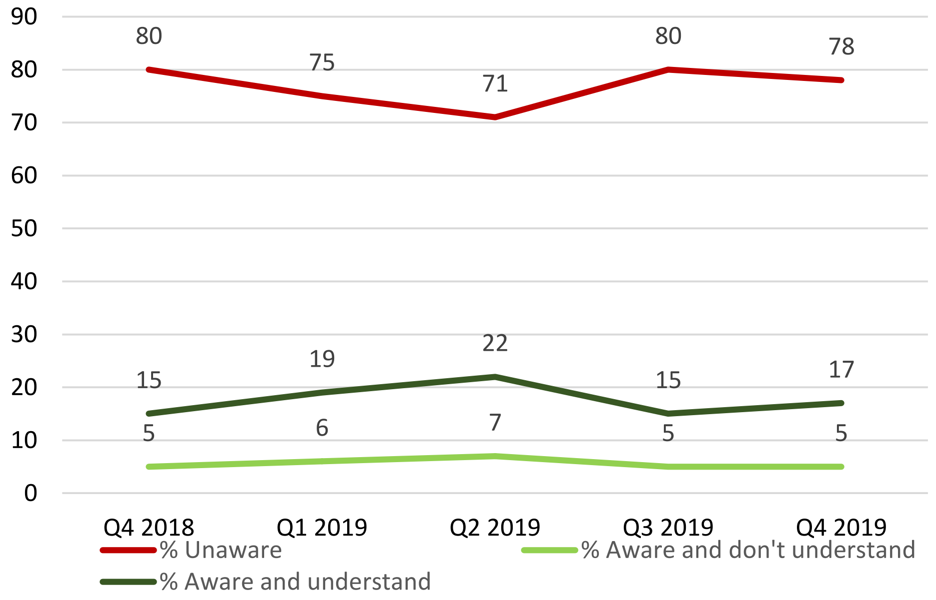
And understanding of the principle of the cap has remained similar compared to the previous quarters



Which of the following do you think best describes what an energy price cap is? (%) Base: All Participants (Q1 2019: 3,200; Q2 2019: 3,236; Q3 2019: 3,206; Q4 2019: 3,209)

Informed awareness of the cap has recovered somewhat but still below peak level seen in Q2 2019

17% have heard of the cap and understand it. This is slightly higher than last quarter but still below the peak in Q2 2019



Before today, had you heard about a new energy price cap known as a `Default Tariff Cap'? / Which of the following do you think best describes what an energy price cap is? (%) Base: All Participants (Q1 2019: 3,200; Q2 2019: 3,236; Q3 2019: 3,206; Q4 2019: 3,209)

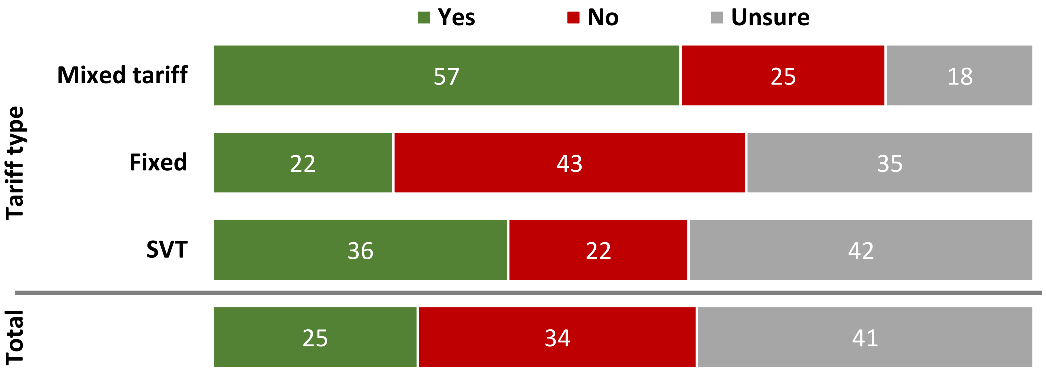
- Higher awareness among following consumers:
  - Ever switched supplier (21% vs 9% never switched)
  - Contacted supplier in last 3 months (20%)
  - ABC1 (21%)
  - Online consumers (18%) vs digitally excluded (5%)
  - Aged 50+ (21% vs 13% aged 16-49)

*** Pps = Percentage points**

Accent

Perceived relevance of cap

25% feel the cap could apply to them (**57%** for those on a mixed tariff)

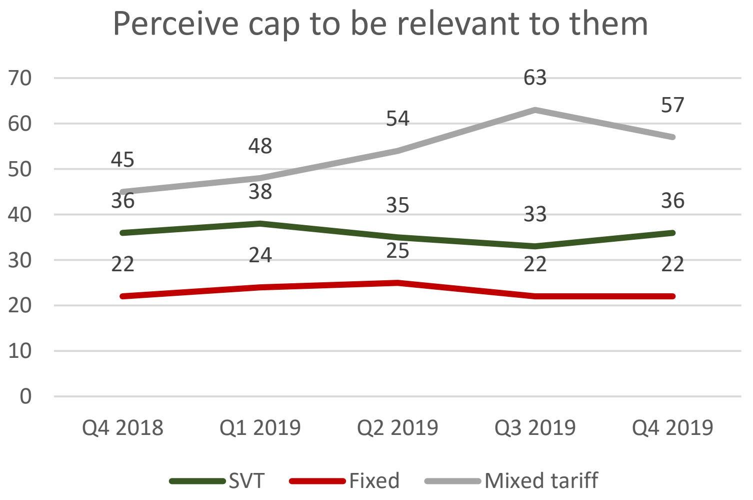


Deemed most relevant by:

- Younger consumers: Aged 16-34 (33%)
- Aware of and understand the price cap (32%)
- Anyone paying with standard credit (38%) and those using PPM (32%)

Knowing this, do you think that the default tariff price cap will apply to your energy bills? (%)
Base: All Participants (3,209), Mixed Tariff (27), Fixed (1,828), SVT (649)

Perceived relevance by tariff type over time



Accent

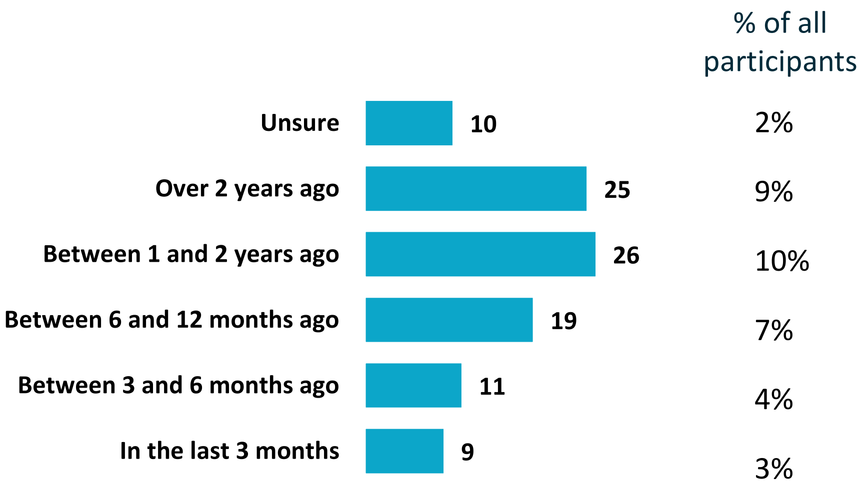
Smart meters

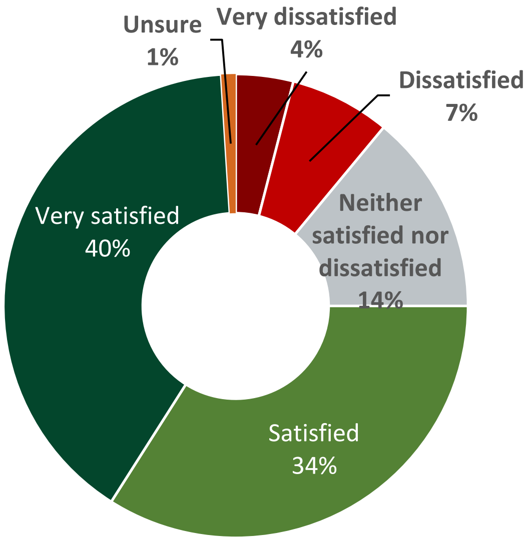
Smart meter use

42% have a Smart Meter based on their description of their energy meters

Nearly three quarters are satisfied with the installation process

39% installed in last 12 months:





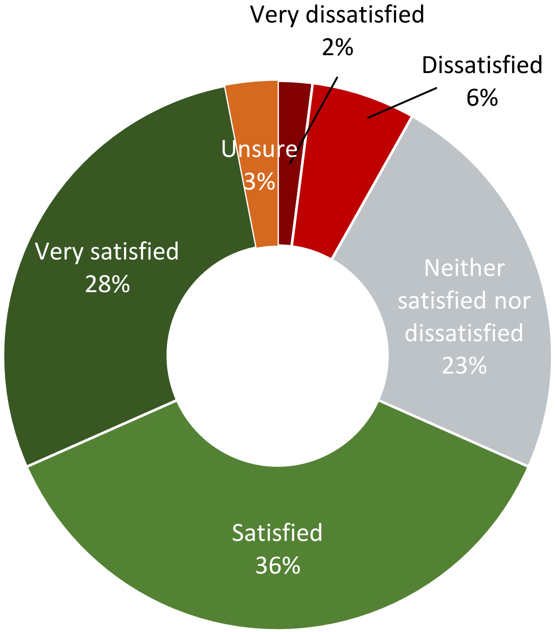
Of the two meters described below, which is the most similar to the one in your home? / When did you have your smart meter installed? (%)
Base: All Participants (3,209) / All with smart meter (1,324)

How dissatisfied or satisfied were you with the process you went through to have a smart meter installed? Base: All with smart meter installed in last 6 months (255)

Accent

Satisfaction with smart meter

64% are satisfied with their smart meter



Overall, how satisfied or dissatisfied are you with your smart meter?
Base: All with a smart meter (1,324)

- Higher satisfaction among:
  - Digitally excluded (87%)
  - Satisfied with supplier (71%)
  - Those using PPM (70%)

Annexes

Abbreviations/terms used in this report

Suppliers:

- Largest Six suppliers = British Gas, EDF, E.On, nPower, SSE and Scottish Power
- Medium Tier suppliers = Bulb, Co-operative Energy, First Utility, Green Star, Octopus Energy, Ovo, Utilita, Utility Warehouse
- Small Tier suppliers = all other suppliers

Tariffs / Payment:

- Fixed = Consumer is on a fixed tariff for their electricity and gas
- SVT = Consumer is on a Standard Variable Tariff for their electricity and gas
- Mixed tariff = on different types of tariff for gas and electricity
- Dual Fuel = Consumer uses the same supplier for electricity and gas
- PPM = Pre-payment Meter

Demographics:

- SEG = Socio-Economic grade
- ABC1 = Consumers falling into the top three socio-economic bands
- C2DE = Consumers falling into the bottom three socio-economic bands
- Online = Survey sample sourced from an online consumer panel
- Digitally excluded = Sample sourced from face-to-face in-home interviews. All selected on the basis they have no or limited access to the internet

Other:

- PCW = Price Comparison Website
- PPS = Percentage points
- Net Satisfaction = % satisfied minus the % dissatisfied

Measuring smart meter use

- Use of smart meters was measured by asking participants to indicate which of the following best described the energy meters they have in their home.
- The question was asked separately of gas and electricity. The order of the meter descriptions was randomised across the survey sample.
- Those selecting the description for Meter A (the titles remained static) for either gas or electricity were deemed to have a smart meter.

Meter A	Meter B
Monitors energy use	Monitors energy use
Automatically sends readings of how much energy has been used in your home to your supplier	You or someone else in your household personally send readings of how much energy has been used in your home to your supplier OR someone from your supplier visits your home to take meter readings
Shows how much energy has been used in pounds and pence on a display or an app or online account	Does not show how much energy has been used in pounds and pence on a display or an app or online account
Has been installed in the last 5 years	Has been installed more than 5 years ago
SHOW IF HAVE A PRE-PAYMENT METER Allow those who pre-pay for energy to top up via their mobile or online	SHOW IF HAVE A PRE-PAYMENT METER Those who pre-pay for energy must top up at a pay point, post office or other shop

Sample profile: unweighted vs weighted

Demographic characteristic		Unweighted	Weighted
Gender	Male	46%	49%
	Female	54%	51%
Age	16-34	16%	18%
	35-49	28%	29%
	50-64	27%	27%
	65+	29%	25%
Social grade	AB	27%	29%
	C1	26%	27%
	C2	19%	18%
	DE	28%	26%

Demographic characteristic		Unweighted	Weighted
Region	East	10%	9%
	East Midlands	8%	7%
	London	11%	13%
	North East	5%	4%
	North West	11%	12%
	Scotland	10%	9%
	South East	14%	14%
	South West	9%	9%
	Wales	5%	5%
	West Midlands	9%	9%
	Yorkshire & Humber	9%	9%

Matt Evans
Tel +44 (0)20 8742 2211
Matt.Evans@accent-mr.com
December 2019