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Energy Consumer Satisfaction Survey

Wave 19: Interim Report of Findings (July 2024)

Published in October 2024

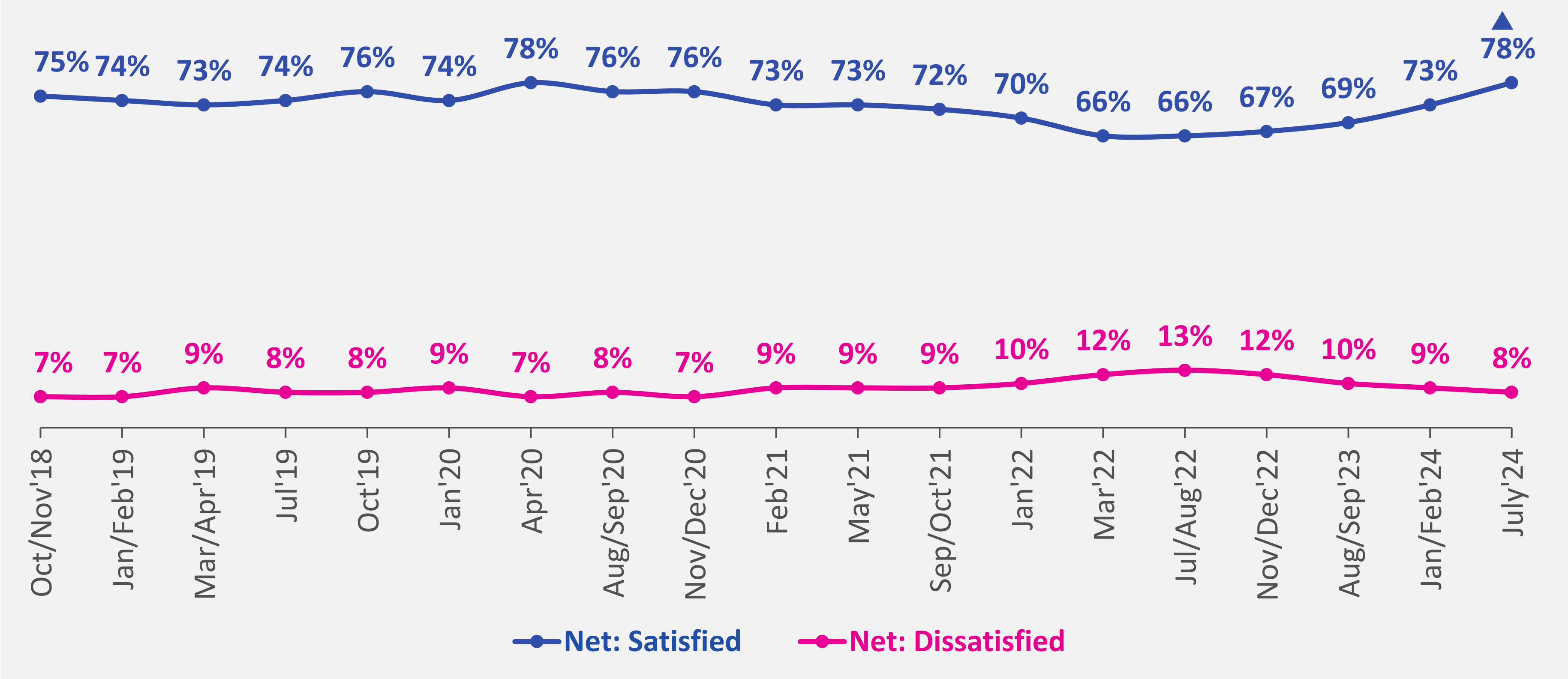
Background and Methodology

- Ofgem and Citizens Advice carry out a regular survey to explore domestic energy consumers' experiences of the energy market.
- The survey covers a range of topics, including satisfaction with energy suppliers, satisfaction with the dimensions of customer service and experiences of supplier support for consumers struggling with their energy affordability issues.
- BMG Research conducts this research on behalf of Ofgem and Citizens Advice. This is the third wave conducted by BMG. Each wave surveys approximately 3,500-4,000 domestic energy consumers across Great Britain. Fieldwork for this wave was carried out from the 10th of July – 1st August.
- This report is an interim report of findings. It explores key areas of interest but does not cover the full breadth of questions explored within the research. We have published this interim report to allow for earlier public use of findings. The full findings of this research will be published later in 2024.
- Further details about the Energy Consumer Satisfaction Survey, including the accompanying technical report can be found here.

Consumer type	Methodology	Jul'24 Sample
Digitally enabled general population	Online survey via online panels	3,014
Digitally enabled but less present on panels	Online survey – river sampling	233
Digitally excluded	Face to face	200
Boost of PPM and SC customers	Online panel and face-to-face	303
Total	All combined	**3,750**

Overall supplier satisfaction is at its joint highest level since tracking began - level with the previous peak recorded in April 2020

Overall satisfaction trended over time*



Source: A5: Overall, how satisfied or dissatisfied are you with [supplier] as your supplier of <FUEL TYPE>? Base: All respondents (3,750)
* Please note that the intervals of time between the points at which this tracking survey was conducted are not consistent.

▲▼ Significant difference from July'24 against Jan/Feb'24 at 95% confidence interval

Overall Satisfaction has increased to 78% - a second successive increase

- **Satisfaction has increased:** Satisfaction has continued to increase (78% from 73% in Jan/Feb'24 2024). This places satisfaction levels at the highest joint level since the tracker began in 2018 and up 9% points on summer 2023.
- **Reported financial vulnerability continues to ease:** In comparison to the last wave, there has been an increase in consumers classified as ‘doing well’ financially (49% cf. 43%) and a decline in consumers classified as ‘vulnerable’ (19% cf. 22%) and ‘highly vulnerable’ to financial pressures (15% cf. 20%). There has been a statistically significant uptick in satisfaction observed among those who are 'Doing well' (85% compared to 82%). While not significant, we have seen a continued upward trend in satisfaction among those financially vulnerable and highly financially vulnerable.
- **Supplier performance is improving across a number of key customer service dimensions:** For example, there has been an increase in overall customer service satisfaction (71% from 66% in Jan/Feb'24) and the proportion of consumers reporting that they found it easy to contact their supplier (70% from 65% in Jan/Feb'24 2024).

Overall Satisfaction	Aug/Sep’23	Jan/Feb’24	July’24
Summary: Satisfied	69%	73% ▲	78% ▲
Summary: Dissatisfied	10%	9%	8%

Overall Satisfaction by Financial Vulnerability*	Aug/Sep’23	Jan/Feb’24	July’24
Doing well (% satisfied)	78%	82% ▲	85% ▲
Getting by (% satisfied)	75%	74%	78%
Vulnerable (% satisfied)	61%	67% ▲	70%
Highly vulnerable (% satisfied)	51%	61% ▲	65%

Financial vulnerability groups*	Aug/Sep’23	Jan/Feb’24	July’24
Doing well	41%	43%	49% ▲
Getting by	17%	15% ▼	17%
Vulnerable	22%	22%	19% ▼
Highly vulnerable	20%	20%	15% ▼

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

*Details of how the financial vulnerability groups have been calculated can be found in the appendix of the wave 18 report Energy Consumer Satisfaction Survey: January to February 2024 | Ofgem

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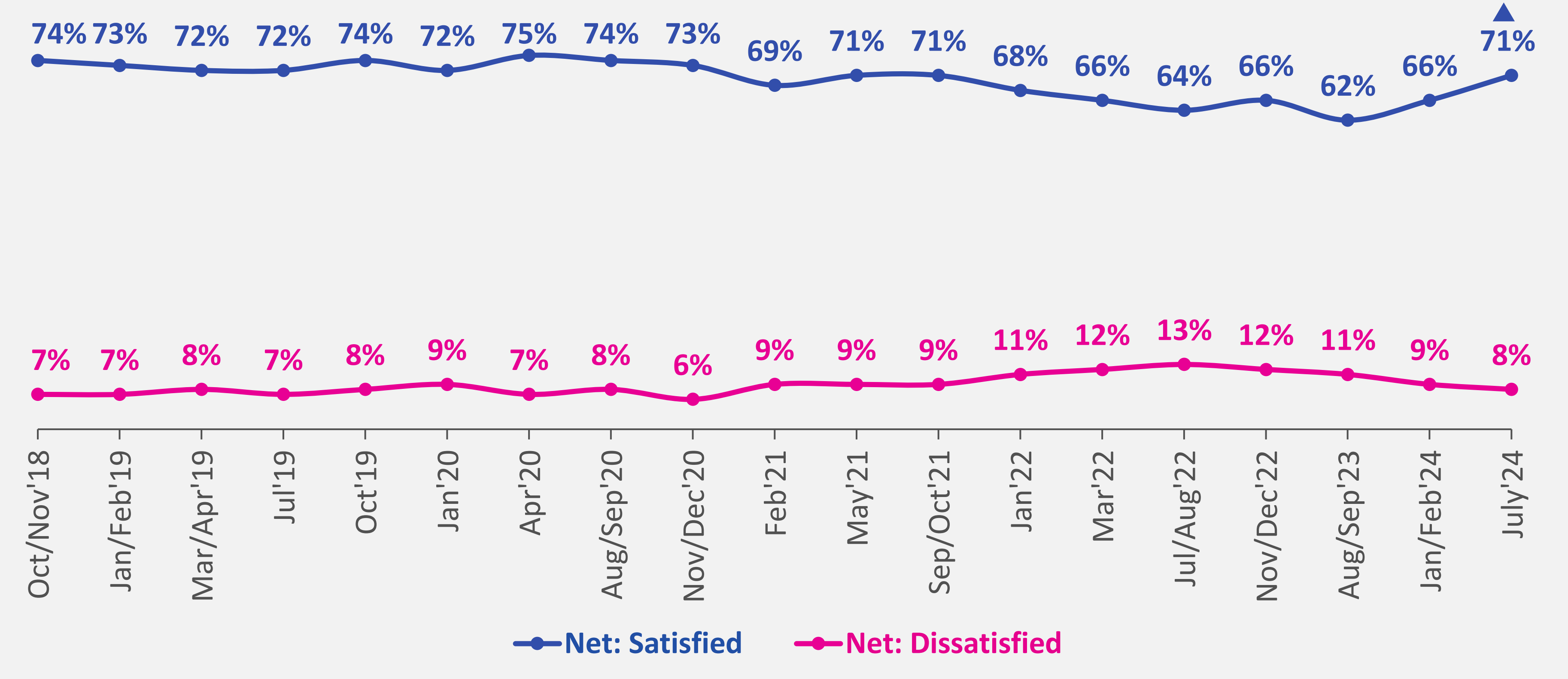
Like overall satisfaction, satisfaction with customer service has also increased since Jan/Feb'24 and is back at levels last seen in mid to late 2021

Overall satisfaction with customer service trended over time



Source: A7. Overall, how satisfied or dissatisfied are you with the customer service you have received from [supplier]. Base: all respondents (3,750). Data labels under 3% not shown.

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▲▼ Significant difference from July'24 against Jan/Feb'24 at 95% confidence interval

Satisfaction with aspects of customer service such as contact ease have also improved

Satisfaction with customer service, billing and contact experience continued to increase:

- **Customer service satisfaction improving:** Overall satisfaction with customer service has increased from 66% to 71%, the highest score since Sep/Oct'21.
- **Greater billing accuracy satisfaction:** Satisfaction with bill accuracy has improved from 74% to 77%. Although ease of understanding (78%) hasn't improved further, it continues to be at its peak level since the tracker started in 2018.
- **Better contact experiences:** Consumers' experiences of contacting their suppliers have improved, with the proportion rating it as easy increasing from 65% to 70%.
- **Increased satisfaction with information received**: Satisfaction with information received has increased from 75% to 78%.
- **The rate of complaints is steady:** 8% report making a complaint, stable with Jan/Feb '24. 47% reported being satisfied with the handling of the complaint, also in line with Jan/Feb'24.

Customer Service Metrics	Aug/Sep'23	Jan/Feb'24	July'24
Satisfaction with customer service	62%	66% ▲	71% ▲
Satisfaction with billing accuracy	70%	74% ▲	77% ▲
Satisfaction with ease of understanding the bill	71%	78% ▲	78%
Ease of contacting supplier (% easy)	60%	65% ▲	70% ▲
Satisfaction with information received	74%	75%	78% ▲
% that made a complaint	10%	7% ▼	8%
Satisfaction with the handling of the complaint	41%	36%	47%*

* Please note that while this is a % point increase, this isn't statistically significant increase on Jan/Feb'24 given a low base size.

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

Proactive support offered by suppliers to those behind on energy payments has returned to levels reported in Aug/Sep’23

- **The proportion of customers falling behind/running out of credit for affordability reasons remains stable overall:** The percentage falling behind on direct debit or standard credit has remained stable, but there has been a decline in those running out of credit on PPM (17% cf. 21%). However, it is important to note that this research reflects customers’ perceptions, with other sources painting a less positive picture*.
- **More customers have had contact with their supplier about support after falling behind for affordability reasons**: 7 in 10 (71%) of those who ran out of credit or fell behind on energy bills for affordability reasons said they had contact with their supplier about this, compared with 60% in Jan/Feb'24. More customers reported they have been proactively contacted by their supplier about support (18% cf. 12% in January/February 2024), returning to levels seen in Aug/Sep’23. However, a notable proportion (27%) of those falling behind reported that they had not had any contact with their supplier about this.
- **Satisfaction with support after falling behind for affordability reasons has increased:** 7 in 10 (69%) were satisfied with the support they received in paying their bills, a notable increase compared to Jan/Feb'24 2024.

Customers Behind On Energy Payments	Aug/Sep’ 23	Jan/Feb’ 24	July’ 24
% fallen behind/ran out of credit	12%	11%	10%
% fallen behind on direct debit	9%	7%	7%
% fallen behind on standard credit	27%	20% ▼	20%
% run out of credit on PPM	21%	21%	17% ▼

Supplier Support Metrics	Aug/Sep’ 23	Jan/Feb’ 24	July’ 24
% contacted by their supplier for support	17%	12% ▼	18% ▲
% contacted their supplier for support	48%	48%	53%
Satisfied with support received	63%	61%	69% ▲

* For example, Ofgem data on debt and arrears.

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

Elsewhere, satisfaction with other services has increased or remained stable

We have seen some metrics improve:

- Smart meter satisfaction has increased (72% cf. 68%). However, around 1 in 3 (35%) continue to report that they encountered an issue with their smart meter in the last 3 months.
- Satisfaction with services received on the Priority Services Register has increased (71% cf. 61%).

While some metrics remain stable:

- Satisfaction with the switching process has remained stable (85% cf. 82%).
- Satisfaction with the ease of comparing suppliers (79% cf 72%).

Other Metrics	Aug/Sep' 23	Jan/Feb' 24	July' 24
Satisfaction with smart meter	67%	68%	72% ▲
Satisfaction with services received on the PSR	64%	61%	71% ▲

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

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

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