

HOUSEHOLD CONSUMER PERCEPTIONS OF THE ENERGY MARKET

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Research conducted in Q3'22 – July and August 2022

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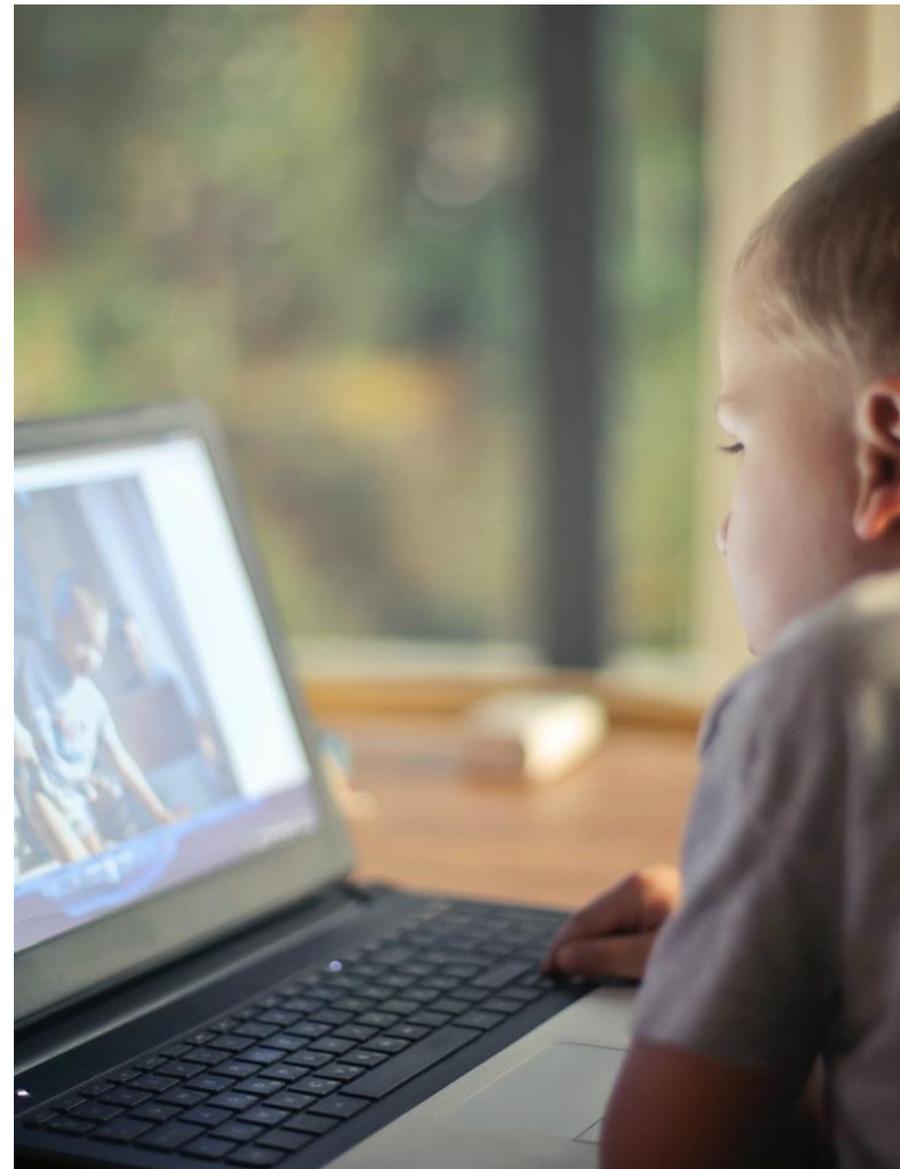
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- **Objectives** - The purpose of the research is to measure how well gas and electricity suppliers deliver to customer service principles set out by Ofgem, as well as providing measurement of topical energy issues and an understanding of consumer experiences when dealing with suppliers on energy matters. Ofgem and Citizens Advice have been jointly funding this research since 2018.
- **Methodology** – Data for Q3'22 was collected using a mixed-method approach. The majority of the interviews were conducted using Computer-Assisted Web-Interviewing (3,082 interviews). Consumers who are digitally-excluded were interviewed using Computer-Assisted Telephone Interviewing (150 interviews).
- **Quotas and weighting** - The survey follows the same approach as previous quarters and uses quotas to achieve a sample representative of the GB bill-payer population (other than gender). Data is also weighted to the known profile of the GB population. As quota sampling was used, caution should be taken when generalising to the population level.
- **Timing** - Data for Q3'22 was collected between 12th July and 5th August 2022. This research was conducted before price cap increase announcements in August 2022. The survey was not run in Q2'22, so throughout this report comparisons are drawn between Q3 and Q1'22.



Overall satisfaction overview

Following a significant decline in Q1'22, in Q3'22 consumers' overall **satisfaction** with their energy suppliers was stable at a historic low of 66% (vs 66% in Q1'22).

Dissatisfaction was also stable, with just under 1 in 6 consumers dissatisfied with their supplier overall (13%, vs 12% in Q1'22).

These findings should be interpreted in the context of the ongoing global gas crisis, as factors relating to the global gas crisis are likely to have contributed to the decline in overall satisfaction. This is because of the widespread impacts the global gas crisis continue to have on energy affordability, supplier failure and market engagement.

Key supplier interactions performance

Consumer perceptions across most of their interactions with suppliers were largely stable compared to Q1'22, but many sat at their lowest ever level:

- **Customer service:** around two-thirds of consumers remained satisfied with their supplier's customer service (64%), which is similar to Q1'22 (66%) but at the lowest since tracking began.
- **Contact ease:** A similar proportion of consumers got in contact with their suppliers as in Q1'22 (38%, vs 37% in Q1'22), and a quarter continued to have found this difficult (24%, vs 25% in Q1'22), suggesting suppliers are failing to address issues faced by consumers when they are getting in contact.
- **Billing:** 70% of consumers were satisfied with the ease of understanding bills (vs 70% in Q1'22), and 68% satisfied with billing accuracy (vs 68% in Q1'22). While this is consistent with the previous wave this also remained at the lowest level since tracking began. Common reasons why some consumers said they are dissatisfied are that they struggle to interpret their bills, or to understand how their bills relate to energy use.
- **Complaints handling:** 11% of consumers who contacted their supplier made a complaint (vs 8% Q1'22). A similar proportion of consumers remained dissatisfied with the way their complaint was handled (49%, vs 52% in Q1'22). Dissatisfaction was due to long processing times, and customer service experienced through email and phone channels.
- **Switching:** dissatisfaction with the switching process overall increased in Q3'22 (16%, +6% vs Q1'22). This is due to a combination of factors relating to both the previous and existing suppliers – such as delays with final bills (24%), inconsistent information (24%), incorrect tariffs (21%), poor customer service (21%), and being charged twice (21%).