

Professor Stephen Littlechild

The Overall Customer Satisfaction (OCS) score is an average of four indicators of customer satisfaction. These are based on Ofgem complaints data, Which? ratings, Citizens Advice scores, and customers' own ratings on Trustpilot.

Since the last OCS calculation (Nutwood, Energy Spectrum Issue 788, 6 December 2021), all four of these entities have published new ratings.

At end-December, Citizens' Advice scores for Q321 were down from the previous quarter: E and Outfox were down by 11.4 and 10, respectively, Ovo and E.ON UK were down by 6. Against this, Scottish Power, Boost and Ecotricity were up slightly, by 4, 2.4 and 2, respectively. (Here and below, all scores reported are out of 100.)

In early February, Which? reported its annual customer survey taken in October 2021. The number of energy suppliers rated fell from 23 in the previous year to 14. Seven of these suppliers had left the market but another two suppliers (E and Ecotricity) did not meet Which?'s higher cut-off level for number of customer respondents to its survey. This means that E and Ecotricity were not rated and therefore have to leave the OCS League.

Which? customer scores were markedly lower than the previous year, perhaps reflecting the COVID-19 situation in September 2021 relative to 2020. Outfox, Octopus Energy, Shell and Bulb were down by 20, 10, 10 and 9, respectively. Only Boost, up 4, showed a slight improvement.

Ofgem complaints data for Q421 showed, overall, a slight improvement over the previous quarter. Shell was up by nearly 13, Bulb by over 9. Against this, Octopus Energy was down by over 9, Outfox by 8.

Finally, the most recent picture on Trustpilot was a little more encouraging. Boost increased from 86 in September to 90 at end February 2022, after falling to 70 in early January 2021; Shell was up from 80 to 84, again after falling to 70 in January 2021; and Utility Warehouse was up from 76 to 80, where it had been a year earlier.

What effect has all this had on the OCS League? Our December graph looked at the impact over the previous year (November 2020 to November 2021). Today's graph shows the evolution of OCS scores since end-August 2021. (Bear in mind that the first three components of the latest scores are based on Q3 and Q421 while the Trustpilot ratings are as observed last week.)

Despite a fall from 85 to 80, Octopus Energy is now indisputably top of the league, a remarkable achievement maintained over several years. Outfox falls markedly from 85 to 75 but still stays second. This is because Avro (previously 81) has left the market, and Which? did not have enough customers this year to rate E, which had previously been at 78. Then comes Utility Warehouse, recovering after an earlier decline in performance and now holding its ground at 74.

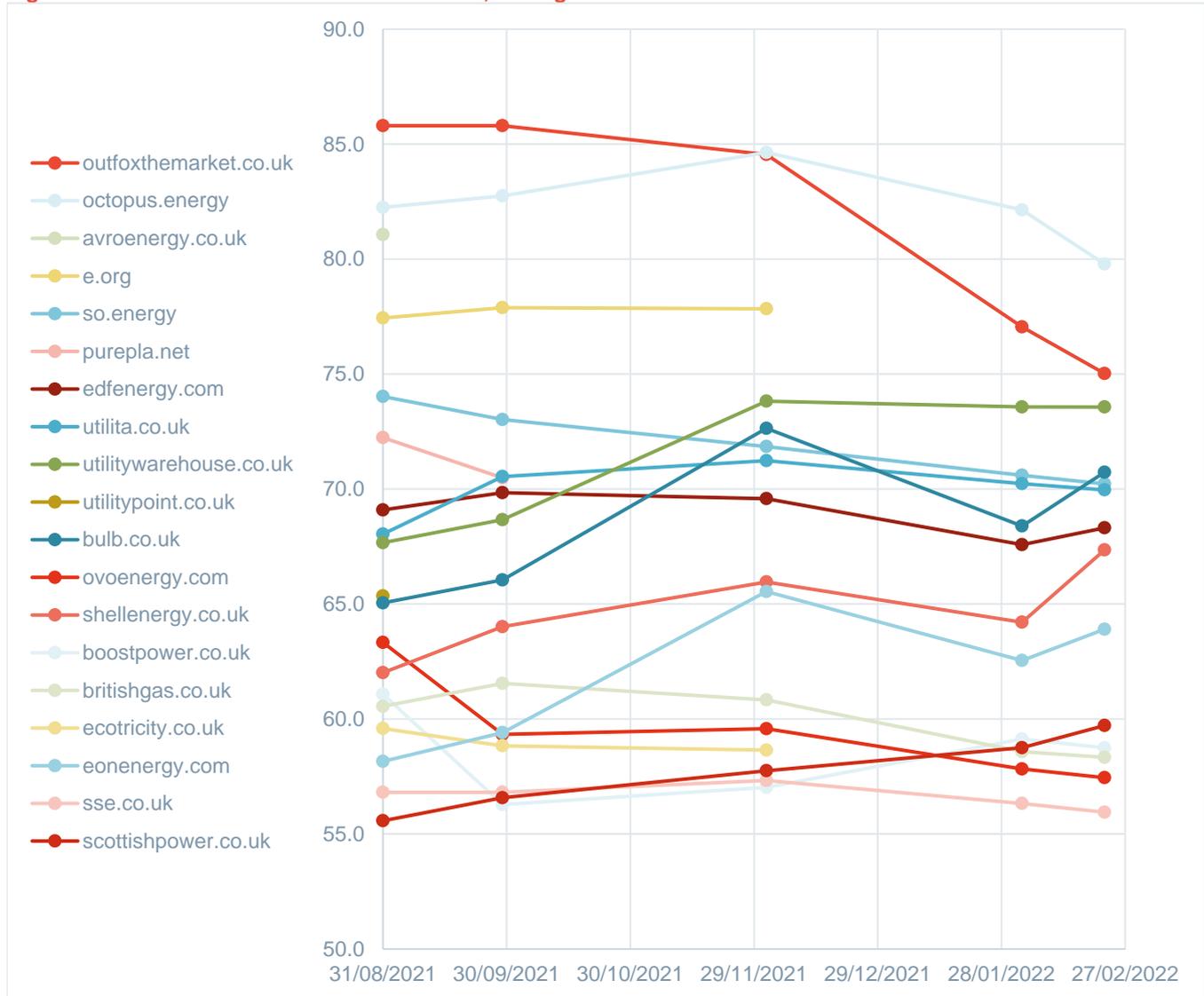
In the middle group are half a dozen suppliers. Bulb has recovered to 71, after rising from 65 to 73 then falling to 68. So Energy has declined slightly to 70 and Utilita is holding its ground at 70, as is EDF Energy at 68. Shell has improved markedly from 62 to 67, escaping the lowest group. Similarly for E.ON UK, here an average of E.ON UK and EON Next, increasingly weighted to the latter. It was bidding to join the middle group with its earlier increase from 58 to 65.5, although it fell back slightly in this last month.

Finally, to the lowest group. The score for Scottish Power is up from 56 at the bottom to 60 and now at the top of this group. After an initial fall from 61 to 56, Boost is now back up to 59. But British Gas has slipped from 62 in September to 58, and Ovo more dramatically from 63 to 58. SSE stays bottom, easing from 57 to 56.

It is unfortunate that several smaller suppliers cannot be ranked in the OCS league because they do not meet Which?'s higher cut-off rate (50 customers interviewed). Amongst those not covered are E, Ecotricity and Good Energy.

Over a dozen of the large and medium suppliers have been ranked in the OCS league for some time now. To appear in the league at all is an indication that the supplier has been able to attract and/or retain a significant number of customers. But some suppliers are proving themselves consistently better at scoring well on the four separate ratings. Octopus Energy, Outfox and Utility Warehouse are the current stars; Utilita is sound, Bulb more erratic; EDF Energy is the best of the former large incumbents; and Shell, E.ON UK and Scottish Power are bidding for most improved supplier over the last six months.

Figure 1: Overall Customer Satisfaction scores, 31 Aug 2021 - 24 Feb 2022



Source: Professor Stephen Littlechild

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