

Developments in the Overall Customer Satisfaction League: January 2023

Professor Stephen Littlechild

Professor Stephen Littlechild, former Director General of Electricity Supply (1989-98) and now Associate of the Energy Policy Research Group at the University of Cambridge, describes how energy suppliers' positions in the Overall Customer Satisfaction (OCS) League have changed over the last twelve months.

Which? magazine has just issued its assessment of best energy suppliers for 2023 (based on a customer survey in October 2022 and an information request in November 2022). The main change from previous years is that it now provides separate percentage ratings for its customer survey and for Which's own assessment of company practices.

The good news is that the formal Which? assessment, now expressed as a percentage, includes a number of smaller suppliers that were previously not covered, notably M&S Energy, Good Energy and Ecotricity. These smaller suppliers on average scored just as highly as the medium and larger ones, and in that sense are equally deserving of customer support.

The more problematic news, at least for the Overall Customer Satisfaction (OCS) index, is two-fold. First, Which's total score is no longer based on its customer survey alone. It is now a fifty-fifty weighting of its customer survey score and the Which? assessment score. So there is a discontinuity with previous Which? scores and hence with previous OCS calculations.

Second, several smaller suppliers still can't get into the OCS league because they don't have a Which? customer survey score hence no total Which? score. So this year, Good Energy is back in the OCS league again, but Outfox the Market is now out, and Ecotricity continues to be out.

On average, the Which? customer survey scores have been falling over time: from 64% in 2021 to 59% in 2022 to 54% this year. Most notable falls this year are Ovo Energy down 19% (from 69% to 50%), Boost Power down 14%, So Energy down 11% and SSE Energy Services down 9%. Only Octopus Energy showed an increase, up 5% from 73% to 78%.

However, the Which? assessment scores are higher than its customer survey scores. They average about 65%, ranging from Octopus Energy at 82% down to Scottish Power with 53%. So the combination of the two scores yields a total Which? score averaging about 62%, just slightly above last year's average.

As always, there are numerous small changes in customers' evaluations on Trustpilot. Over the last month Good Energy and Utility Warehouse are up by 2%, Boost Power, Bulb Energy and Scottish Power down by 2%.

Another factor in this week's OCS analysis is a further attempt to clarify the Ofgem complaint statistics. As noted previously, there are some discrepancies between the figures appearing on the Ofgem website and on some supplier websites. Some suppliers publish separate figures for different brands, whereas Ofgem publishes figures for the licensee as a whole. However, there are further unexplained inconsistencies between Ofgem figures and some company figures. In addition, company figures sometimes don't go back more than a couple of quarters, and at least one supplier (So Energy) appears not to publish these statistics at all.

Ovo Energy publishes separate statistics for its recently acquired SSE customers, and also for its PPM supplier Boost Power (although unfortunately these figures are for the last two quarters only). So the OCS league has now reintroduced SSE as a supplier to better reflect the Ovo group situation.

Pending further data clarification for early 2022, Figure 1 shows what OCS performance over the last year looks like.

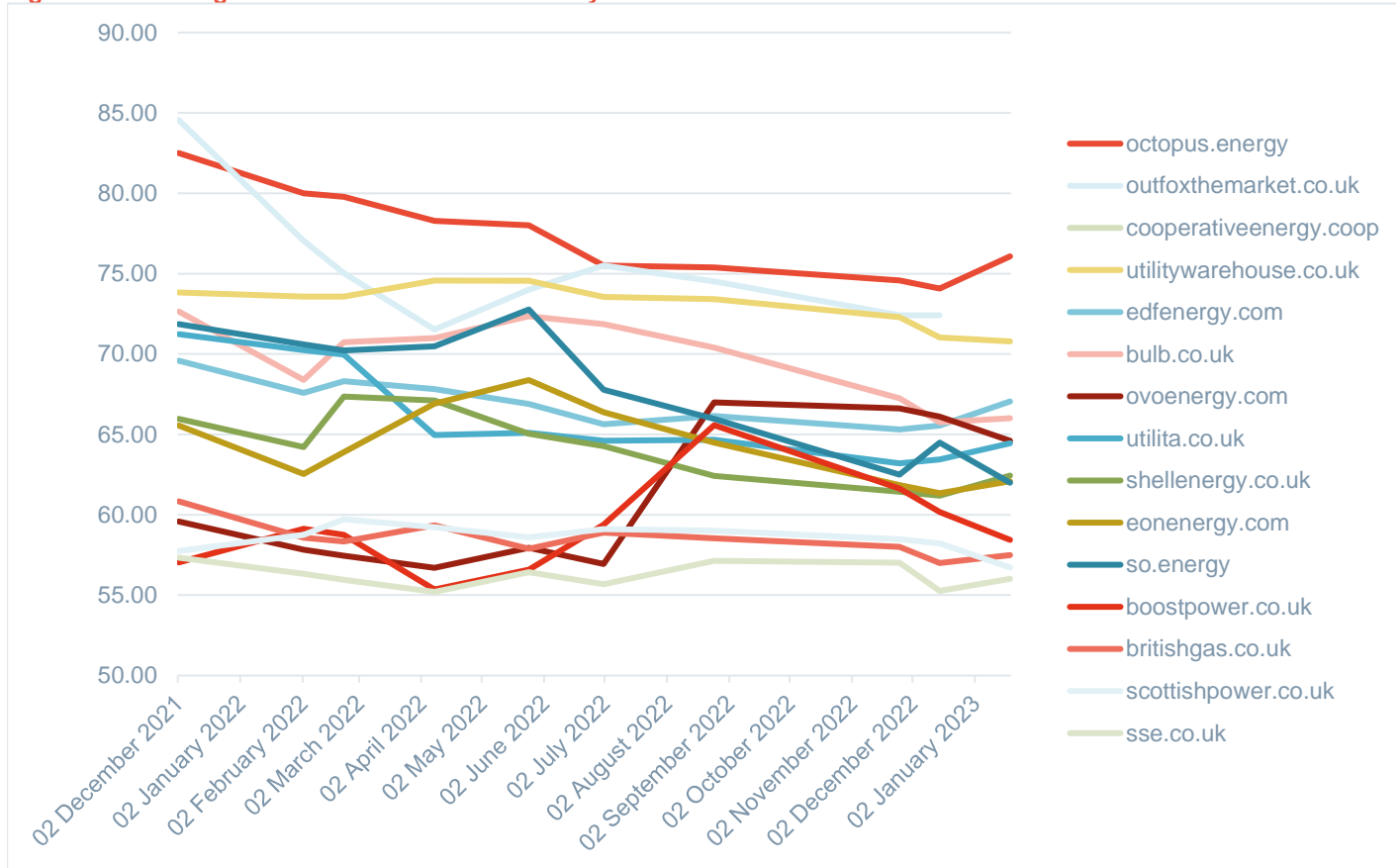
At the top still, as always, is Octopus Energy, now rising from 74% to 76%. Main challenger Outfox the Market is unfortunately now excluded because of too few reviews by Which? customers. But in its place is Cooperative Energy at 72% (alas not shown in Figure 1). In the top division, too, is the consistent Utility Warehouse 71%.

Leading a very competitive second division are EDF Energy 67% and Bulb 66%, followed by Ovo Energy 65% and Utilita 64%, then Shell Energy, Eon Next and So Energy at 62%.

In the third and lowest division are Boost Power and British Gas 58%, Scottish Power 57%, and finally newly resuscitated SSE Energy Services, now a sub-brand of Ovo Energy, down at 56%.

The ever-changing state of the OCS league suggests that the energy supplier market remains competitive. Suppliers are vying to provide better customer satisfaction, as well as competing on price, and some suppliers are consistently more or less successful than others.

Figure 1: OCS League for December 2021 to January 2023



Source: Professor Stephen Littlechild

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