

## Context

The energy crisis has affected almost all consumers in Scotland. Our recent energy tracker survey<sup>1</sup> on affordability and consumer experiences of suppliers highlighted that consumers in Scotland are in a difficult financial situation and are expecting that to worsen in the coming months<sup>2</sup>. Most consumers in Scotland are finding it increasingly difficult to keep up with the rising costs of energy. Sixty-nine per cent are finding it more difficult than last year to keep up with their energy bills.

In this briefing we provide new evidence on consumers' experience of their energy supplier, amongst the unprecedented affordability challenges. Our evidence indicates the experience of engaging with suppliers could be improved for many energy consumers in Scotland - with low levels of positive agreement across multiple categories and high levels of consumers neither agreeing nor disagreeing about positive statements.

The research was conducted during a period of unprecedented high energy bills which will influence responses. However, given forecasts of high prices until 2030 and beyond,<sup>3</sup> the future retail market and regulatory environment will need to consider how to embed positive consumer outcomes into a challenging retail environment.

<sup>1</sup> Consumer Scotland commissioned YouGov Plc to conduct an online quantitative survey, administered in three waves, to an existing research panel of members resident in Scotland. The total sample size in the autumn 2022 wave was 1,586 adults (aged 16+). Fieldwork was undertaken 27th September – 10th October 2022. The fieldwork therefore straddled the period covering the end of the last Energy Price Cap and the introduction of the Energy Price Guarantee on 1st October

## Key Findings



### **Most consumers do not feel they are being offered a good price for energy**

- Less than a quarter (23%) of consumers thought they were being offered a good price for energy by their supplier
- A significant number of consumers (40%) do not think that they are being offered a good price and 37% neither agreed nor disagreed



### **Less than half of consumers agree that their energy supplier treats them fairly**

- Forty-three per cent of all consumers agreed that their energy supplier treats them fairly in their dealings with them
- Forty per cent of consumers neither agreed nor disagreed they are treated fairly by their supplier
- Direct debit/standing order customers were more likely (46%) than prepayment meter customers (28%) to report that their supplier treats them fairly



### **Only one-third of consumers would recommend their energy suppliers to others**

- Thirty-four per cent of all consumers would recommend their energy supplier to others with 23% not agreeing they would recommend their supplier

2022. The survey was of all consumers, and not only those on regulated fuels.

<sup>2</sup> Consumer Scotland (2022) [Consumer Spotlight: Energy Affordability Tracker](#)

<sup>3</sup> Cornwall Insight (2022) [Energy price likely to remain high until 2030](#)

- Forty-three per cent of consumers neither agree nor disagree they would recommend their supplier
- Whilst a substantial proportion (42%) of prepayment meter customers neither agreed nor disagreed, only 24% of prepayment meter customers would recommend their supplier compared 37% paying by direct debit or standing order



### **Some consumers think that their supplier does not make it easy to contact them**

- Forty-five per cent of all consumers agreed their supplier made it easy to contact them, compared with 27% who disagreed
- Twenty-eight per cent neither agreed nor disagreed their supplier is easy to contact
- Prepayment meter customers are less likely (30%) to agree that their supplier makes it easy for them to contact them compared to 47% of direct debit/standing order customers



### **Most consumers find the language in their bills easy to understand**

- Fifty-six per cent of all consumers agree that the language in the bills they receive is easy to understand
- Nineteen per cent disagreed and 25% neither agreed nor disagreed that the language in bills is easy to understand
- Sixty per cent of direct debit and standing order customers and 51% of customers paying on receipt of a bill find

the language in their bills easy to understand, compared to 39% of prepayment meter customers



### **Over half of consumers think energy bills provide guidance on what to do if they are worried about paying their bill**

- Fifty-two per cent of all consumers agree that their energy bills provide guidance on what to do if they are worried about bills
- Seventeen per cent disagreed that their bills provided guidance and 31% neither agreed nor disagreed.
- Those aged over 55 are more likely (60%) to hold this view than those aged 16-34 (44%)
- Customers paying direct debit or standing order are more likely (58%) than those paying on receipt of a bill (40%) or by prepayment meter (35%) to agree. It is notable prepayment meter customers receive an annual statement rather than physical monthly bill

### **Next steps**

This research has highlighted that many consumers could have a better experience of the retail energy market. Successive waves of the Energy Tracker will help Consumer Scotland regularly monitor consumer experience of energy suppliers. Insights from this work can help inform action to support consumers this year and next, as well as Ofgem's consideration of consumer standards and fair pricing<sup>4</sup>.

<sup>4</sup> [Jonathan Brearley's speech at Future of Utilities Summit - 21/11/22 | Ofgem](#)