Nutwood

Developments in the Overall Customer Satisfaction League

Professor Stephen Littlechild

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

Last week Ofgem published new complaints data for Q321, there have been some small changes in TrustScores, and several suppliers have exited the market.

What effect has all this had on the OCS League? In October, we looked at the impact over the last month (ES 779). Today we consider the impact over the last year.

Back in November 2020, 23 energy suppliers were rated by these four sources, and appeared in the League. By November 2021, seven of them had left the League. After January 2021, Cooperative Energy, Spark Energy and Together Energy were no longer rated by Which?, primarily because of relatively low customer numbers.

Green Network Energy exited the market in January 2021, Avro Energy and Utility Point in September, Pure Planet in October. The scores of these last three suppliers may have declined slightly in their last few months, but they were rated above average in the League, not to mention those suppliers that did not make it into the League. Their demise was not the result of failing to provide customer satisfaction: indeed, Avro was one of the highfliers in the League.

What of the 16 suppliers that maintained membership of the League from November 2020 to November 2021? Figure 1 graphs their performance.

Octopus Energy and Outfox the Market remain ahead by some distance, Octopus Energy now regaining the lead by the narrowest of margins. Notably, prepayment supplier E has steadily risen into clear third position.

The rest of the top half of the League is a closely grouped bunch of five suppliers:

- Utility Warehouse leads here, recovering after stumbling during the summer.
- Next is Bulb Energy, dramatically recovering after a calamitous fall from grace during the spring, having once been at the very top of the League. Will its present status in state ownership enable it to continue its revival? (Bulb was the subject of the first Energy Supply Company Administration (ESCA) order on 22 November.)
- So Energy has declined steadily and significantly from the very highest position in the League. Can new owner ESB, the state-owned Irish conglomerate, halt this decline and hopefully improve the situation?
- Next is Utilita, continuing a steady and encouraging improvement in performance.
- Finally EDF Energy maintains a solid and worthwhile performance as best of the former Big Six suppliers.

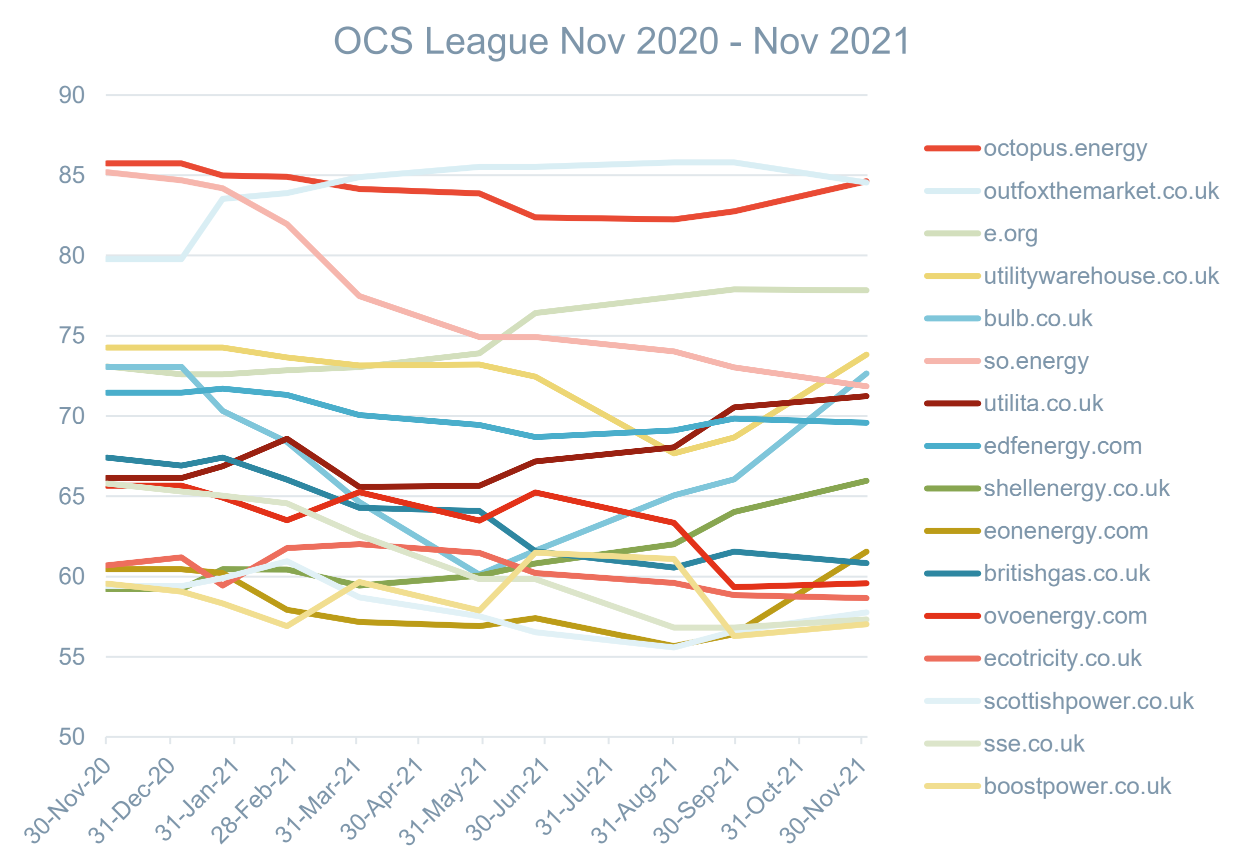
What of the bottom half of the League? Shell Energy is comfortably ahead of the rest of the pack, having hauled itself up from the bottom of the League in November 2020. Then seven suppliers are tussling to escape the bottom.

- E.ON has spurted ahead in the last few months, primarily reflecting the transfer of its customers to E.ON Next, which is separately and more highly rated on Trustpilot and uses the pioneering software platform Kraken developed by Octopus Energy.
- Next is British Gas, slowly declining during 2021.
- Ovo Energy follows, having once seen much better days.
- Ecotricity and Scottish Power are next, not much sign of improvement over the last year.
- SSE, a decline, gradually absorbed into Ovo Energy but for the moment still retaining a separate identity.

- Bringing up the rear is PPM supplier Boost Power, from the Ovo Energy stable, a few months earlier it had looked more promising.

As always, the suppliers in the OCS League are those that have attracted and retained sufficient customer numbers to be worth ranking. Two or three times as many suppliers are not in the League because they are too small or too unknown to be even listed. A few of the OCS League members have perished in the recent turmoil in the wholesale gas markets, but for the most part the OCS League members have come through well. The higher ranked ones are therefore worth considering if a customer's present supplier seems inadequate.

Figure 1: OCS League Nov 2020- Nov 2021



Source: Professor Stephen Littlechild

Cornwall Insight's Hydrogen Index

The role of low carbon hydrogen in achieving our net zero targets has been a hot topic of conversation of late, both within industry circles and in mainstream media and public conversation. As the discussion builds, Cornwall Insight has sought to interrogate the policy and strategy frameworks presented by some countries which have tooted themselves as potential leaders in the new hydrogen economy.

Due to be released in January, the index maps jurisdictions according to the strength of their policy and strategies for supporting the development of hydrogen. The index is driven by factors including the detail of published hydrogen strategies and timelines, the extent of hydrogen targets, the available public finance for both infrastructure development and R&D, and the planned review of strategy across the next few decades. For more information or to get in touch about partnering on this project, email Naomi Potter n.potter@cornwall-insight.com.