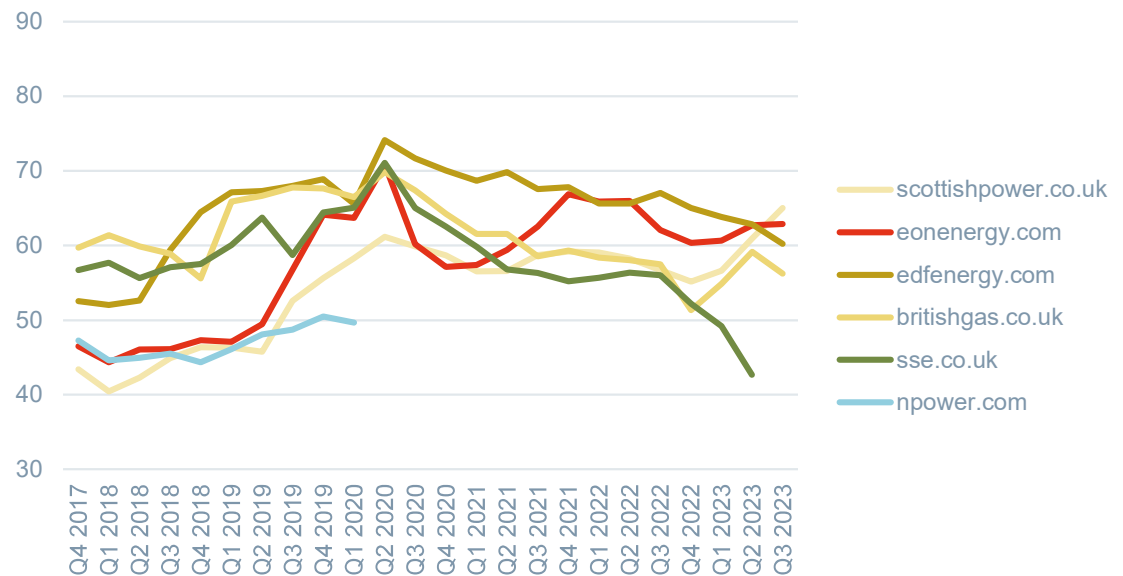


The Overall Customer Service (OCS) score is calculated as the average of the ratings provided by Ofgem, Citizens Advice, Which? magazine and customers themselves on Trustpilot. Part 1 of this review ([Energy Spectrum Issue 889](#), 5 February 2024, pp 23-4) examined how the four different component elements of the OCS score evolved over the last six years (from Q417 to Q323) for retail energy suppliers as a whole. The present Part 2 compares how the OCS scores have evolved for the original Big Six suppliers and for the Large and Medium new entrant suppliers.

Performance of the initial Big Six suppliers

The Big Six suppliers dominated the market from shortly after opening, through the 2000s and into the early 2010s. Figure 1 shows that, as of Q417, their customer service was rated poor, with OCS scores down in the 40s and 50s. However, these companies realised that they needed to improve their performance to hold out against the increasing number of lower-

Figure 1: OCS scores for initial Big Six suppliers



Source: Professor Stephen Littlechild

priced and customer-friendly new entrants that, by then, had taken a fifth of the market. Eventually most improved: their scores rose sharply to the lower 70s by Q220, except for npower, which was withdrawn from the market following takeover by E.ON, and Scottish Power which reached only 60. After Q220, with the sharp increase in wholesale costs and the stifling effect of the Default Tariff Cap on competition, many smaller competing suppliers dropped out of the market. Big Six customer performance seriously flagged, down to the 50s and lower 60s by Q422. But recently there has been an encouraging upturn to the high 50s and low 60s in Q323, except for SSE (see below).

EDF Energy (EDF) was the first Big Six supplier to improve performance. It rose remarkably from 52 to 74, and was generally the highest rated Big Six supplier for most of the whole six year period – although it has fallen back this last quarter. E.ON rose later but remarkably strongly and has performed well, albeit more erratically. Both EDF and E.ON purchased the Kraken software developed by performance leader Octopus Energy (Octopus). British Gas started the period as the most highly ranked Big Six supplier, and responded second to the new challenge, but has since fallen back to fourth. SSE was ranked relatively well in the early period and reached 71 in Q220 but declined significantly to 43 after the Ovo Energy (Ovo) takeover, when it was temporarily maintained as a separate brand before being taken out of the market. Finally Scottish Power, at 40 was the lowest ranked supplier at the beginning of the period, improved to 60 by early 2020, though others improved more. Thereafter its performance declined slightly to 55 at end 2022 along with other Big Six

suppliers, but in 2023 it suddenly surged to 65, becoming the most highly rated of the original Big Six suppliers. This was unexpected: let's hope it can last.

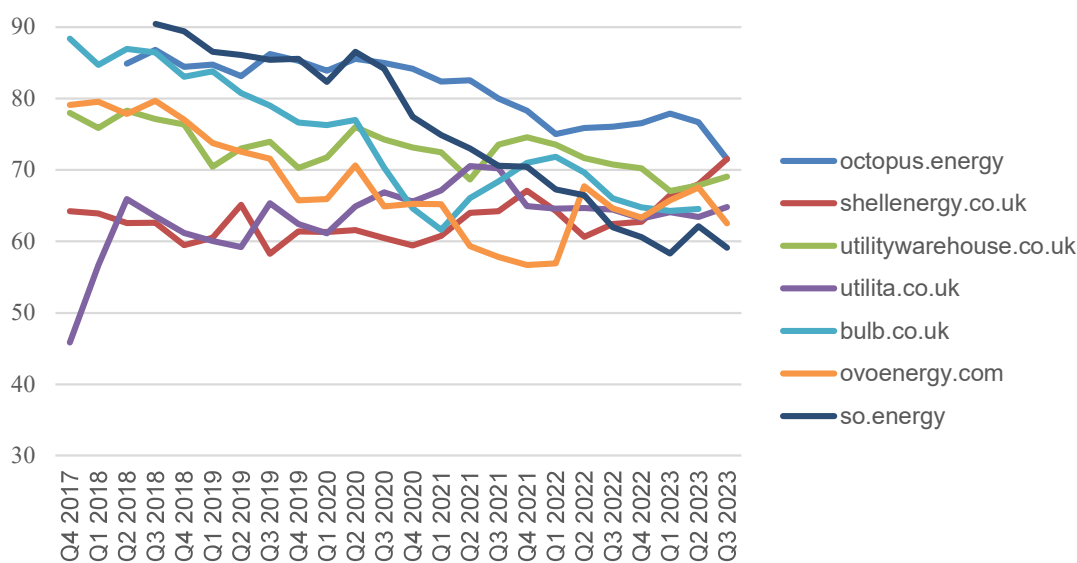
Performance of Large and Medium new entrant suppliers

Figure 2 shows the scores of seven new entrants that succeeded in becoming Medium or even Large suppliers. With one initial and temporary exception, they all scored highly on customer satisfaction throughout, generally in the range 60 to 80. Indeed, for the first three years Bulb Energy, Octopus and So Energy were vying for top spot in the upper-80s, with So Energy even hitting 90 in Q218. Only in the last quarter has the top end of the range dropped to 70, but the bottom end has remained at about 60 throughout, a remarkable performance. So the Big Six suppliers were right to be worried and had to respond.

Octopus is now the largest new entrant and the second largest of all suppliers. It has been top of the OCS league for the last three years, initially scoring in the mid-80s, though in the latest quarter its score dropped to 72 and it was overtaken by two smaller new entrants ([Energy Spectrum Issue 889](#), 5 February 2024, pp 23-4).

Shell Energy has been consistent but not distinguished, generally near the bottom of this range around 60, but in the last couple of quarters has risen to equal Octopus (Octopus having acquired the retail portion of Shell Energy last year). In contrast, Bulb Energy started the period at nearly 90 but then fell pretty steadily to 65, apparently not transformed by the takeover by the Octopus.

Figure 2: OCS scores for Large and Medium new suppliers



Source: Professor Stephen Littlechild

Utility Warehouse has been consistently strong, generally around 70, often a bridesmaid but never quite a bride: it is now third in this group. Utilita – the largest speciality prepayment meter supplier - started the period with an exceptionally low score of 46 (dreadful Ofgem complaints numbers but soon remedied and Utilita is now one of the suppliers with fewest complaints). After a year or two in the low 60s Utilita's more recent performance has generally been in the mid-60s.

Ovo's performance has been more erratic: around 80 for the first year but then declining fairly steadily to 57 in Q122. (Ovo was then absorbing the rather larger SSE as well as operating the prepay supplier Boost Power. The Ofgem published complaints data, at licensee level, do not distinguish between these three brands.) In the last couple of years Ovo has improved, reaching 68 in Q223 though falling back to 63 in the next quarter. Finally, as noted, when So Energy entered the market in Q218 it achieved the highest ranking ever, of 90, but thereafter it fell pretty steadily (while merging with ESB Energy) and finished the period around 60.

All in all, splendid customer performance from the successful new entrants - arguably they would not have grown as fast without it - and a very beneficial impact on the original Big Six suppliers too. But Part 3 will show a very different range of performances from the smaller and exiting suppliers.