

## Developments in the OCS league in Q3 2024 by Professor Stephen Littlechild

The Overall Customer Service (OCS) league loses a supplier this quarter, as BoostPower is finally absorbed into Ovo Energy. It no longer provides separate customer service data for Ofgem, and its Trustpilot site has been removed. The number of suppliers in the OCS league – those that are scored on all four measurements of customer service – is now the lowest it has ever been. The league started with 25 suppliers in Q4 2017, increased to 34 suppliers in 2019, then gradually fell to 18 by 2021 and is now down to 14 suppliers.

### Latest Ofgem scores

The average Ofgem score for the OCS league as a whole showed a significant increase this quarter – from 62% to 66%. That was basically accounted for by the departure of BoostPower, which had an exceptionally low score of 10.5% last quarter. Nonetheless, the present average Ofgem score of 66% is the highest since the OCS league began seven years ago in Q4 2017. Its lowest point was at 57% in early 2023. The present leader by far is E (92%), followed by Outfox the Market (79%), and Utilita (76%). Lowest scorers are So Energy (56%), then almost unbelievably Octopus Energy and Cooperative Energy (both 55%), and bottom is Ovo Energy (51%). The main improvements this last quarter were by suppliers EDF Energy (up 11%), Utilita and British Gas (both up 6%), and Ovo Energy (up 4%). Lower scores were recorded by So Energy (down 13%) and Utility Warehouse (down 4%).

### Latest Citizens Advice star ratings

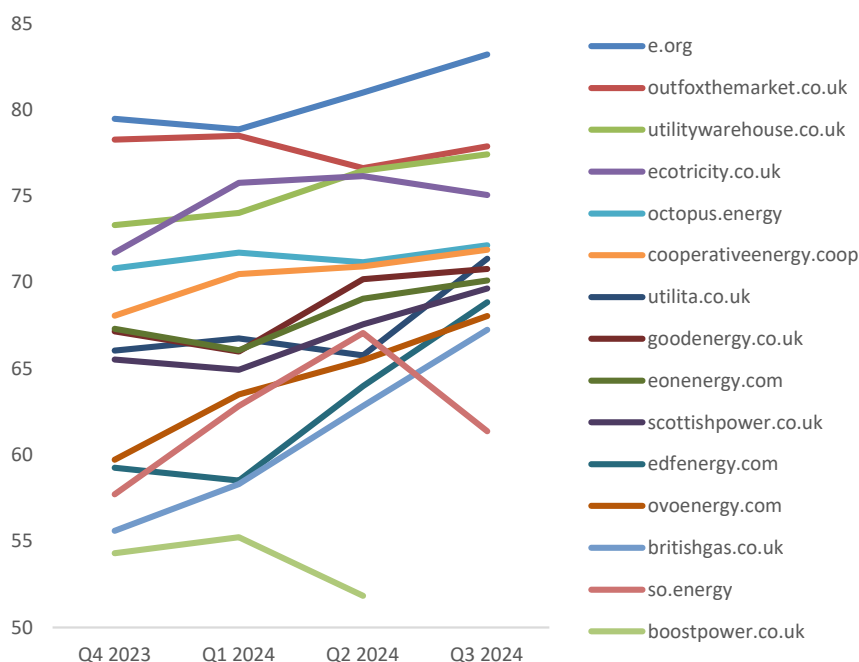
Citizens Advice star ratings are up this quarter, Q3 2024, compared to last quarter (average 64% compared to 61%). Main gainers were Utilita (up 16%), British Gas (up 12%), and E and Utility Warehouse (both up 8%). Main losers were So Energy (down 12%) and Ecotricity (down 4%).

### Latest TrustScores

Customers' own ratings of suppliers, as indicated by the scores on Trustpilot, are generally higher than the other three ratings used. At present, they average about 90%. Octopus Energy, Good Energy, and Cooperative Energy are at the top with 96%, followed by EDF Energy and E at 94%. At the bottom are Ecotricity, Scottish Power, and Utilita all on 86%, British Gas on 84%, and So Energy on 82% - but these are still high ratings compared to the other three evaluations. As usual, there was limited movement in TrustScores, but that is not to say there were no changes. There is evidence both of marketing efforts by suppliers, invitations to review and sometimes (but not always) responses by customers.

Over the last quarter, eight suppliers in the OCS league showed little evidence of marketing, with an average increase in number of reviews of about 4% (ranging from 2% to 6%), and no change in Trustscores. Three suppliers seem to have encouraged more reviews and each secured an increase in Trustscore: E.ON (19% increase, up 88 to 90), EDF Energy (12% increase, up 92 to 94), and So Energy (8% increase, up 80 to 82). But encouraging more reviews does not automatically yield an increased Trustscore. See for example Scottish Power (10% increase, staying level at 86) and Octopus Energy (15% increase, staying level at 96). Also, outside the OCS league, Rebel Energy showed a 19% increase in reviews but Trustscore level at 90. Just one supplier in the OCS league showed a fall in Trustscore:

Figure 1: Overall Customer Service League Q4 2023 - Q3 2024



Source: Professor Stephen Littlechild

Outfox the Market down 94 to 92, with only a 2% increase in number of reviews.

### What does all this mean for the OCS scores as a whole?

The average OCS score has increased from 69% to 72%, the highest level ever recorded, beating the 70% achieved in mid-2020. This was not due simply to the exit of BoostPower, previously only 52%: that alone would have increased the overall average from 69% to 70%.

Major gainers this quarter were Utilita up 6%, British Gas and EDF Energy up 4%, and Ovo Energy, E, and Scottish Power all up 2%. With the exception of E, which was previously top of the league, and BoostPower which has left the league, these were five of the six lowest ranked suppliers. The only major reduction was the other supplier in that bottom six, namely So Energy, which is down 6%. Figure 1 shows the impact on the OCS league over the last four quarters. E at 83% is maintaining its lead ahead of Outfox the Market (78%) and Utility Warehouse (77%), with all three improving. Ecotricity (75%) is falling off the pace slightly. But these four in turn are some way ahead of the main pack: it seems very difficult to distinguish the next nine suppliers, all in the range 67% to 72%, and all of whom have improved over this last quarter. The only disappointment is So Energy, with a sudden fall from 67% to 61%.

### Who are the GOATs in energy customer service?

E is currently the outstanding customer service provider, but how does it rank against suppliers in previous years? Figure 2 shows the suppliers with the highest OCS scores over the seven years that the OCS has been calculated. Nine suppliers have scored 80 or more, but only one supplier, So Energy, has scored 90. Interestingly, all but one of these high scores were in the period up to Q2 2021. The wholesale price rises plus the price cap had an adverse effect on competition, competitors, and customer service. E is the first supplier in three years to top 80%.

But in considering the Greatest customer service provider Of All Time, we need to consider whether their high scores were simply a one-off or sustained over time. The final column of Figure 2 shows for how many quarters each supplier scored 80 or above. For four suppliers, including E, it was for four quarters or less – that is, for at most one year, although E's run is still in progress. Three suppliers – Outfox the Market, Bulb Energy, and Avro Energy – held a score of 80 or over for 6 to 8 quarters, that is, for one and a half to two years. So Energy sustained that high level for 10 quarters, some two and a half years. But Octopus Energy sustained a score of 80% or more for 14 quarters, no less than three and a half years. So I think Octopus Energy pips E and So Energy as energy supplier customer service GOAT.

Unfortunately, even the greatest suppliers have not been able to sustain the very highest level of performance forever. Avro Energy left the market on a high: it never fell below 80% after maintaining that level for two years. Engie fell only fractionally to 79%. These were exceptions. Bulb Energy fell to 62% though it had recovered to 70% by the time it was absorbed into Octopus Energy.

Of the presently surviving suppliers, E is still riding high at 83%. Outfox the Market fell from 86 to 72 but is now back to 78%. The great Octopus Energy fell to 71% and is presently 72%. Cooperative Energy fell to 68% and it too has recovered to 72%. Ovo Energy fell much further to 57% but has recovered to 68%. Most striking fall, perhaps, is that of So Energy, down from 90% at one time to a low of 58% and still only 61% now.

There are thus considerable and fascinating variations in customer service, between suppliers and over time, as one would expect in a competitive market. The very highest individual scores were mostly in the period up to 2021. But there were also some very low scores then, though not discussed here. In terms of the average OCS score, the picture is arguably healthier today than it has ever been.

Figure 2: Highest OCS scores Q4 2017 to Q3 2024

Supplier	Maximum OCS score	Quarter obtained	Duration (quarters scoring 80+)
So Energy	90	Q3 2018	10
Bulb Energy	88	Q4 2017	7
Octopus Energy	87	Q3 2018	14
Outfox the Market	86	Q2 2021	6
Avro Energy	85	Q3 2020	8
E	83	Q3 2024	3
Engie	82	Q1 2019	3
Cooperative Energy	81	Q2 2020	1
Ovo Energy	80	Q3 2018	2

Source: Professor Stephen Littlechild