



True Voice of Customer



# UK Energy Providers' CX

A Twitter Study of Customer Sentiment Using  
Deep Learning, NLP & Linguistics

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# Why read this report?

When things go wrong, customers take to Twitter - sometimes as a last resort, sometimes as a cry for help and sometimes just to say thanks. It's a place where they feel listened to.

But how can you truly listen to and understand your customers when there is so much noise on social media? And how can you identify the problems that need the most attention and those that are affecting some customers most?

**2020 has well and truly sucked.** And it's not over yet. As another national lockdown is announced, scientists have warned that we are faced with one of the coldest winters in 30 years, as the Beast from the East is set to return.

This spells challenging months ahead for households, some of which are already experiencing health or job security worries, debt and a myriad of external factors making day to day life a battle.

As the government announces an extension of the Energy Price Cap until the end of 2021, the **magnifying glass is truly on energy providers' CX and the expected support for customers, especially the most vulnerable.**

This means more pressure than ever on engineers, apps and websites, customer service and social media teams battling with the increasing strains of volume and seriousness of support requests.

**Using our game-changing text analysis software, we've analysed over 70K tweets mentioning some of the top UK energy companies, to uncover:**

- **Which supplier is outshining the rest?**
- **What problems are impacting brand sentiment most?**
- **What issues are affecting one supplier disproportionately?**

Grab a coffee, sit back in your comfy pants and read our report to discover how the brands have performed in the eye of the customer in the last five months.



# What we did

Between **15th June to 15th October 2020**, we listened to a sample of tweets mentioning the Twitter handles of British Gas, Bulb, E.ON, EDF, Npower, Octopus, Ovo, Scottish Power, Shell Energy and SSE.

Over 70K tweets were fed through our game-changing **text analysis and insight platform** where our combination of cutting edge artificial intelligence (AI) and old-school linguistics allows computers to read - and genuinely understand - what people actually mean, not just count the words they use, like traditional social listening tools.

# What we found



## Octopus

Had the happiest customers



## EDF

Topped the charts of the 'Big Six'



## Shell Energy

Had the unhappiest customers



Faulty smart meters, incorrect readings, engineer no shows or unavailability and lack of communication saw smart meters top the charts as the **biggest issue for all providers across the board**.



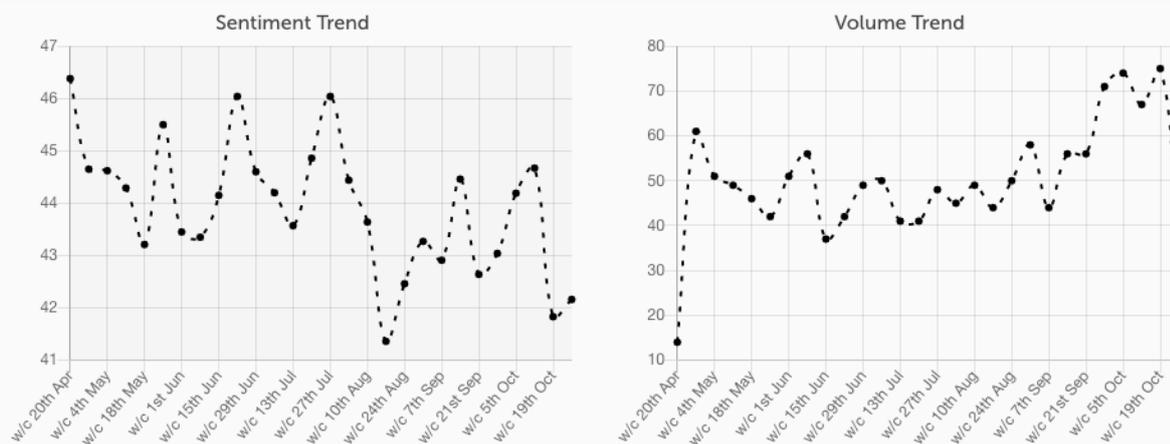
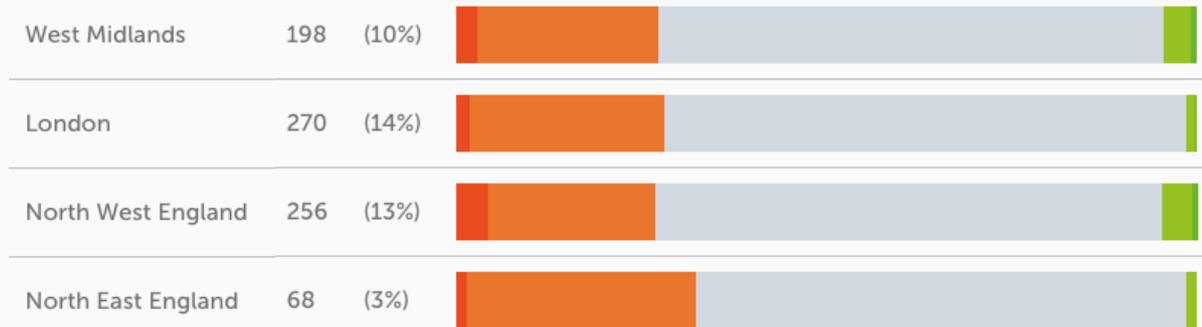
In light of lockdown and increasing social distancing regulations, **Octopus and Shell Energy** were both called out for **unmasked door to door sales representatives** and **unfavourable sales techniques**.



**Off-line live chats** or **unreliable automated bots** triggered frustration from customers who just wanted to complete a simple task and avoid calling - especially when recorded messages advised support was being prioritised for the most vulnerable.

# The Big Issue: Smart Meters

A common theme of frustration for customers across all brands was in relation to smart meters, especially in the following regions, where customers expressed the most negative sentiment in their tweets:



These graphs represent market average sentiment and volume trend changes from the beginning of April to the middle of October, where we see the decline in sentiment correlates to the recent increase in volume on the topic.

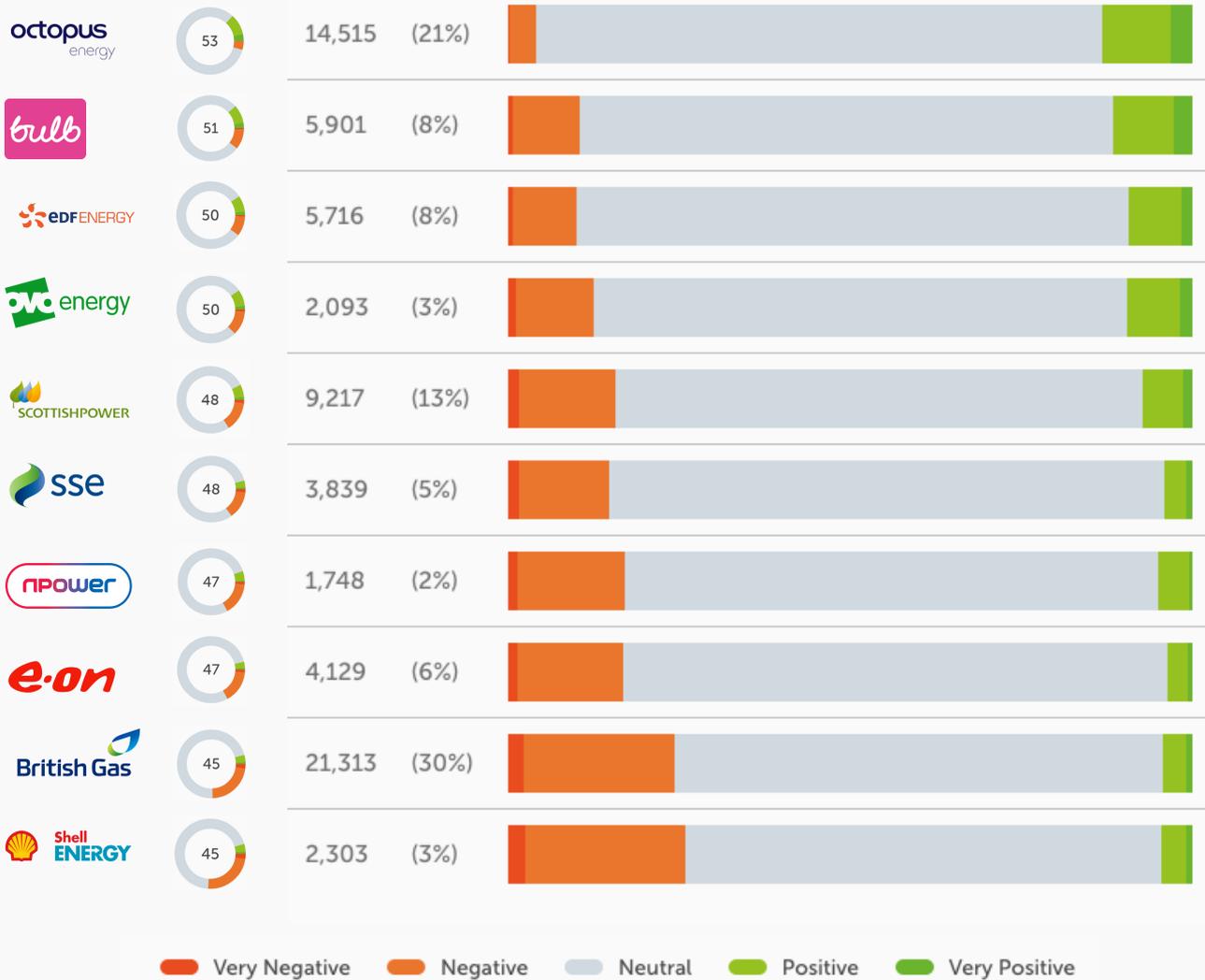
## Top issues being discussed in relation to smart meters

- Engineers - no shows, lack of updates and lack of availability for appointments
- Issues with customers topping up credit but smart meters showing faults and errors - forcing customers into using emergency credit
- Website issues, lack of live chat and call centre availability made customers see red

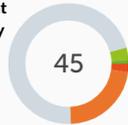
As smart meters proved to be a common theme throughout our reporting period across the board, we eliminated the topic from our individual brand analysis to focus on other issues impacting each energy provider.

# CX League Table

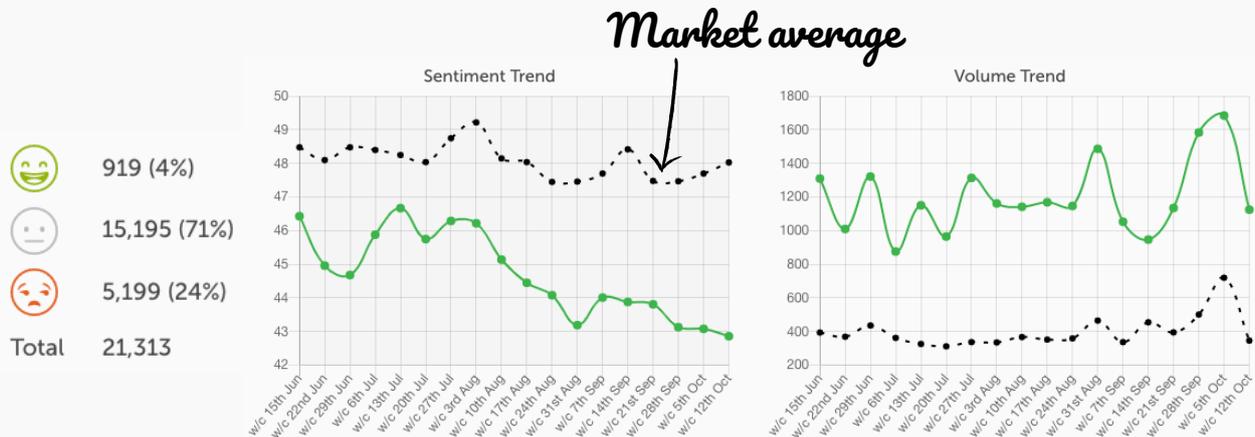
League table of brands based on a weighted average of Wordnerds' generated sentiment score out of 100 - 15th June to 15th October 2020.



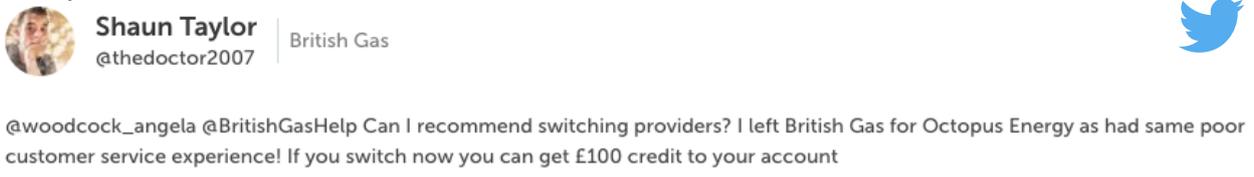
Read on for a brand by brand overview, as we highlight some of the biggest issues that drove customers to Twitter over the last five months...



The volume of tweets mentioning British Gas accounts for 30% of all tweets tracked in our report. Sentiment steadily declined from the beginning of August until early October, when volume spiked as sentiment dipped to its lowest for the reporting period.



Unhappy British Gas customers were **most likely to demonstrate signals of churn** in their tweets with 26% of all conversations around churn directed at the brand. **Challenger brands referral promotions posed a threat** as other brands were tagged in as recommendations by other customers. This was particularly prevalent for Bulb and Octopus.



British Gas customers were most likely to **complain about no hot water**, with 56% of all mentions of the topic mentioning the brand. Most negative reports came from the East of England and East Midlands. 28% of tweets about hot water came from London.



### Home Care

Issues around **multiple repeated cancelled Home Care appointments**, especially for vulnerable raised concern - some tweeting on behalf of loved ones.



### Emergency

55% of all tweets mentioning an "emergency" were directed at British Gas. **No hot water** being the main subject of concern.



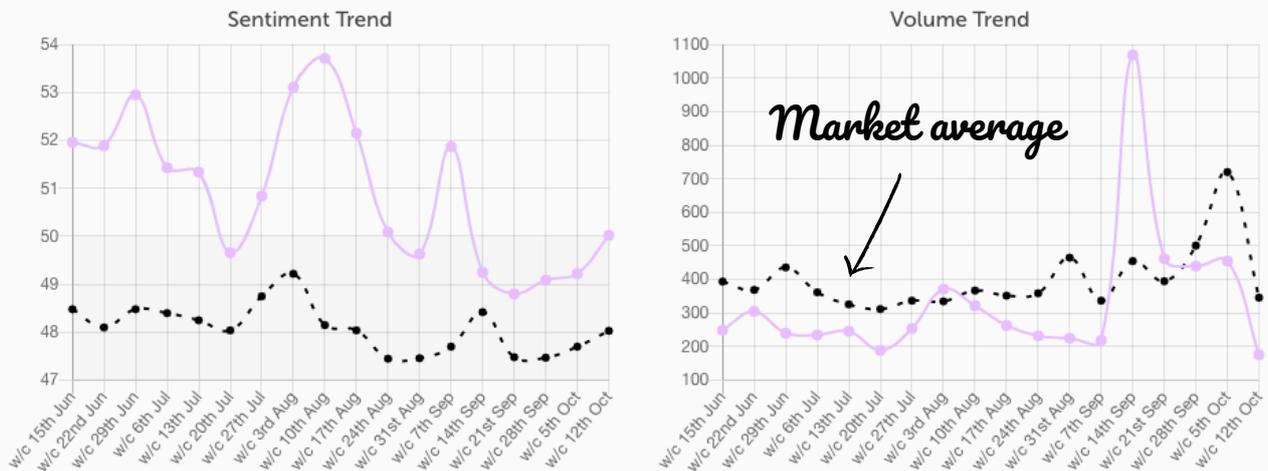
### Wait times

A number of customers complained about **delayed, late or no show engineers** without any updates or tracking capabilities.

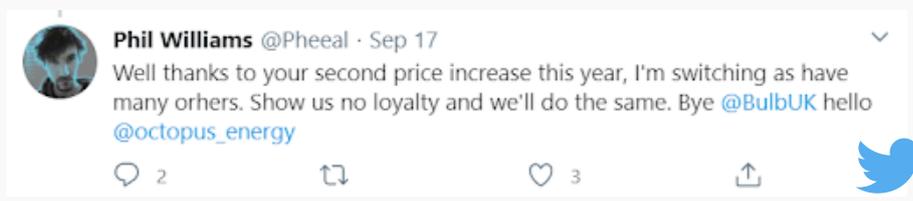
**One to watch:** Multiple reports of **faulty carbon monoxide alarms** as well as the telephone number on the alarms not existing and concerns raised over long waits on boiler servicing.



In five of the six categories we analysed, **Bulb ranked in the top three**. Their sentiment remained **well above the market average** for the duration of the reporting period, but has seen some decline in recent weeks.



The spike in volume and **declining sentiment is the result of price increases** which caused many customers to take to social media to express their grievances - given it was the second hike this year. Some even name dropped the competitors they planned on switching to.



Price increases aside, customers described Bulb's customer service as given them a **"fuzzy feeling"** with the **happiest of customers residing in the South West and North West England**. Bulb came second in the customer service league table. The app also scored well.



### New home

Customers who directly or were indirectly switched to Bulb after moving home expressed **dissatisfaction with immediate price increases**.



### Direct Debit

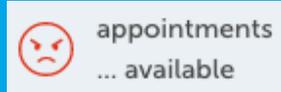
9% of all conversations around direct debits cited Bulb. Changes (increases) and **unexpected payments** were the main talking points, with 16% negative and 81% asking questions or requesting info.

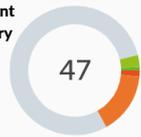


### Churn

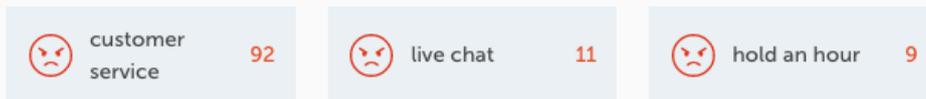
15% of customers who exhibited **signs of churn mentioned Bulb**. This was **400% higher than market average** in September following price increase announcement.

**One to watch:** - Emails requesting customers to book a smart meter when there were **no available appointments** felt like a royal pain and triggered angry responses.





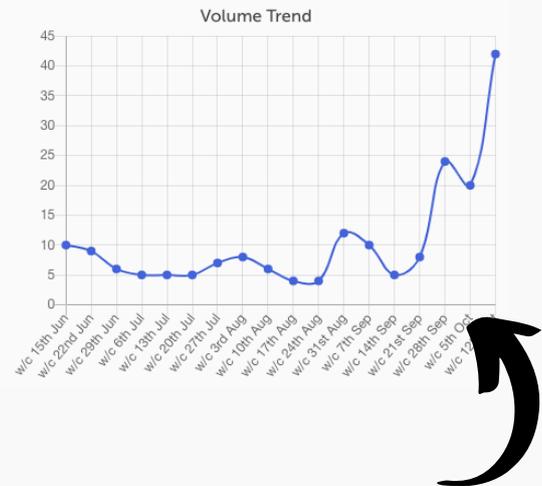
Ranking in the bottom three of our league table, E.ON demonstrated no improvement on issues we found in our summer report, E.ON's availability of customer service continued to be particularly problematic, with the most unhappy customers in Scotland and the North West of England.



## Customer service and bills

There is a direct correlation between customers expressing their **inability to complete tasks using the website or automated telephone services and customer service complaints.**

E.ON customers vented their frustrations at not being able to complete tasks using digital services, then being unable to speak to someone for help.



The volume of tweets mentioning being kept on hold has increased almost 800% in the last four weeks.



### Stress

**9% of customers who referred to stress in tweets cited E.ON**, especially around 13th July - 17th August. Customers also expressed the most negative sentiment when discussing stress when compared to other the brands.

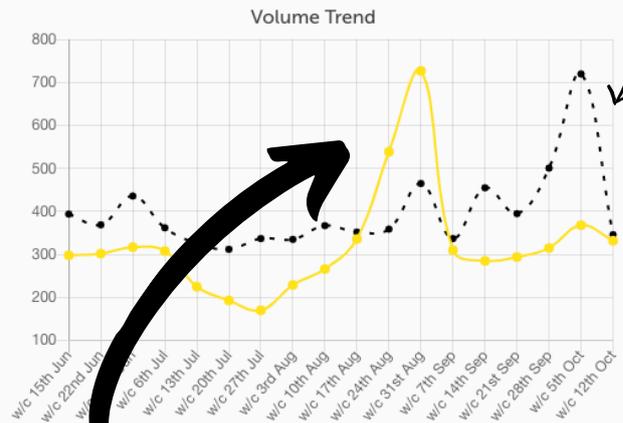
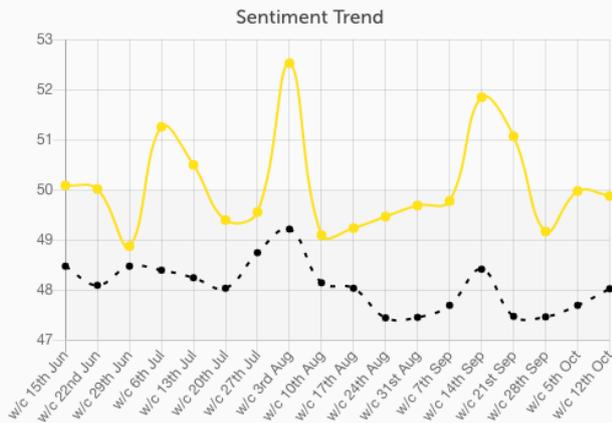


### Lack of positivity

E.ON customers were **least likely to tweet positively about the brand.** The brand also received the lowest level of positive press coverage in the reporting period.

**One to watch:** Recorded telephone messages advising customers to use live chat when it was unavailable angered customers. This was especially an issue at the beginning of October and saw brand sentiment dip 24% below market average.

Echoing the success from the summer, EDF were the top performing Big Six energy brand - finishing third overall after Octopus and Bulb in our latest findings. EDF particularly performed well on customer service compared to other Big Six brands.



This tweet saw EDF's volume spike in early August. The virility of the tweet triggered a number of replies sharing frustrations of EDF - although brand sentiment wasn't impacted by the tweet.



### WhatsApp

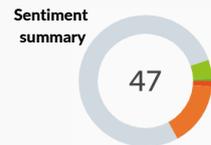
After initial success earlier in the year, customers vented frustration with the WhatsApp service, citing that it left them feeling ignored. Sentiment on the topic dropped 6% in June to October compared to April to May.



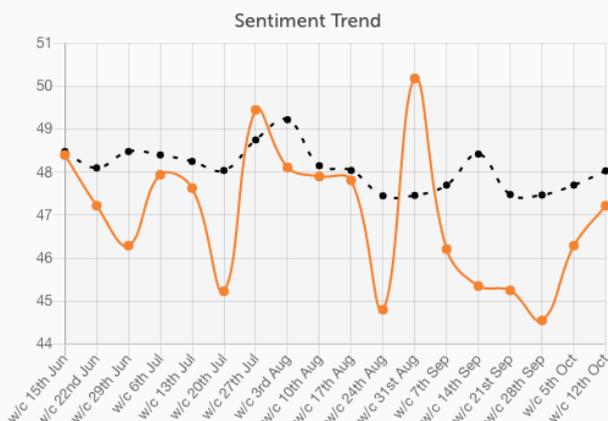
### A country divided

The West Midlands, South West, Wales, South East England and East Midlands were areas with the most unhappy customers. Whereas Scotland, the North West, North East and East of England were much happier with EDF.

**One to watch:** 5% of "vulnerable" mentions were in tweets at EDF, with the third lowest sentiment score. The most severe concerns were around threats of debt collection and higher bills.



After the acquisition by E.ON in 2019, npower is now a much smaller subsidiary, which is reflected by the volume as they were the least mentioned brand in our report. The brand received the most volume of tweets around billing.



Closing accounts was a big source of stress and agitation, prompting discussions of churn.



### Closing accounts

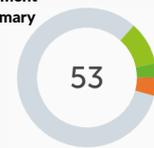
npower accounted for 4% of all conversations around closing an account, with 21% expressing negative sentiment. Customers were unhappy with the inability to submit final meter readings.



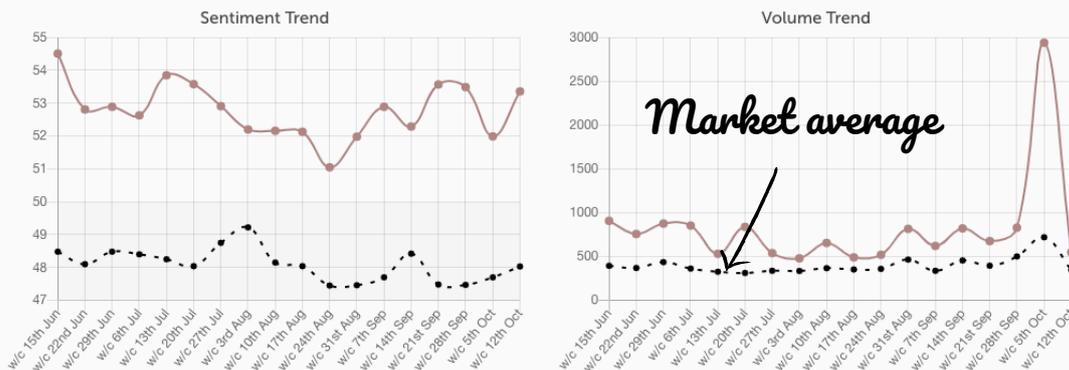
### Live chat

Email issues were reported across password resetting, and customers were unhappy to receive bill increase notifications via email.

**One to watch:** Customers expressed concern around changes to emergency credit, making it difficult for customers to be able to afford the new amount.



Octopus - take a bow. The leaders in our league table. Octopus' sentiment remained well above the market average for the whole reporting period. Their **customer service in particular eclipsed competitors**, truly showing the others how it's done.



**Topics impacting sentiment {Boris photo op aside}**



**Pushy door-to-door sales** was an area of irritation for customers across the country. 39% of the conversations mentioned Octopus with very negative sentiment expressed around the **insensitivity for those in lockdown or shielding**.



Volume around **debt** has increased since September with very negative sentiment seeing Octopus 2nd bottom of all brand mentions around the topic. A spate of debt collection letters recently having the biggest impact on customer sentiment.



**Customer service**

Octopus customers were **more likely to express delight in customer service** - scoring 35% higher than the market average for the reporting period.



**Lucky wheel**

The lucky wheel incentive wins favour from customers, despite minor scepticism over its legitimacy from unlucky participants. **Sentiment since end of August improved 13%.**

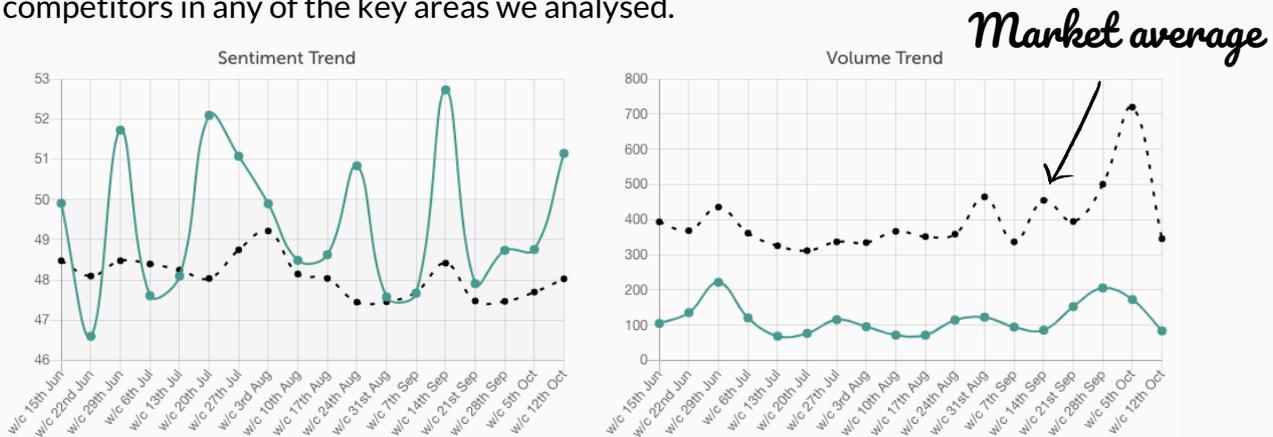


**Smart meters**

Even with 18% of all smart meter mentions, Octopus still managed to top customer sentiment. Happiness around **successful installation, credit given to engineers and enthusiasm around moving across to the Agile Tariff** were expressed.

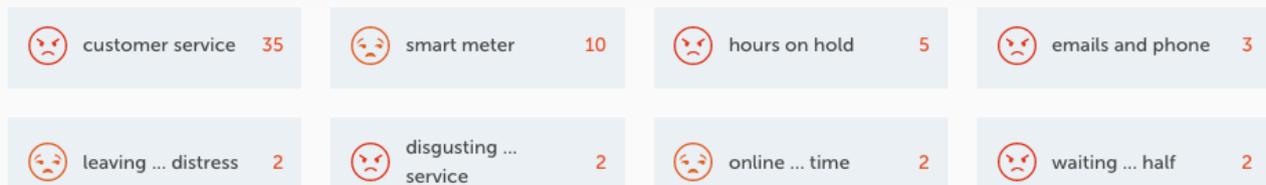
**One to watch: Customers in the North East of England need some love.** Although frequency is at the lower end compared to other areas, they expressed the most negative sentiment when mentioning the brand.

Ovo's 4th place in the league table was determined by maintaining an above market average sentiment score throughout the reporting period, while struggling to outshine competitors in any of the key areas we analysed.



### Customer service

- Customer service scored lowest for Ovo. Around **55% of customer tweets complaining about customer service did not receive a reply on Twitter**. Some even from customers with strong churn signals.
- The **West Midlands proved to be the most unhappy area of customers** with an emphasis on issues with smart meters.
- **Ovo scored the lowest out of all brands in relation to vulnerable customers, -23% below market average.**



### IOS upgrade

21% of app mentions were complaints around **issues caused due to an IOS upgrade, or Boost app feature removals.**

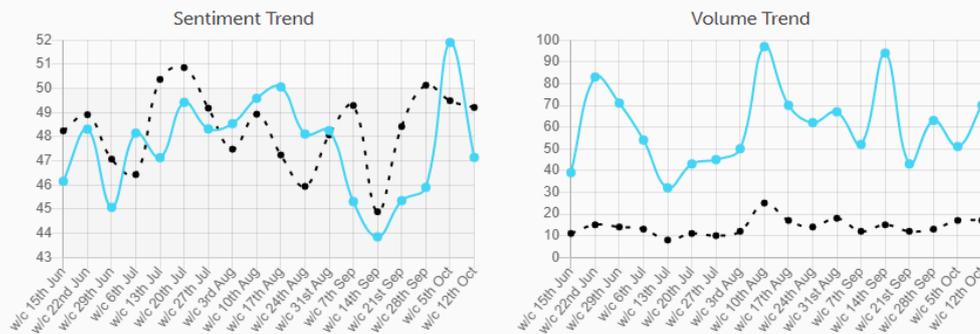


### Bills

Issues with direct debits was most prevalent for OVO customers with 7% of the conversation directed at the brand.

**One to watch:** A number of vulnerable Boost customers expressed their concerns over **supply being cut off despite reaching out to customer service**. There were also concerns about **elderly customers whose homes had been left without power or gas** and had not been provided with any immediate help.

Scottish Power's sentiment remained in line with the market average for the duration of the reporting period, with the volume of tweets substantially above average. They came fifth in our league table, finishing as the second highest of the Big Six.



### Debt recovery

Scottish Power received the second most mentions of "threats", "debt recovery", "debt collection" and "collection agencies".

#### Emotions were particularly heightened when:

- Customers felt they were **struggling to resolve on-going issues** and received a debt collection letter
- Where letters were issued for **previous tenants**
- Where they were reaching out **on behalf of vulnerable relatives/friends** who received notification of debt recovery measures



#### Tonik

The switch for ex-Tonik customers has caused some confusion, especially around which new tariff they were moved on and **"something went wrong" website error messages.**



#### Direct Debit

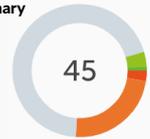
22% tweets mentioning direct debits reported an **issue with set up.** 17% reported something wrong with their direct debit and 18% complained about **unexpected increases.**



#### Power cut

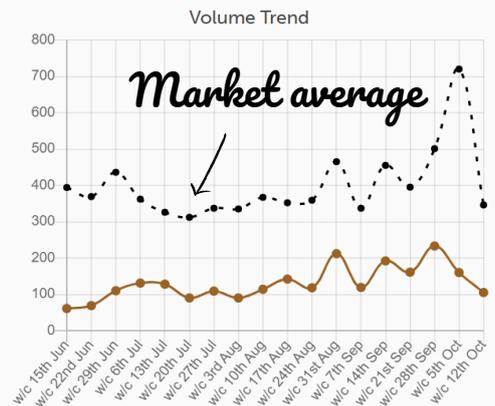
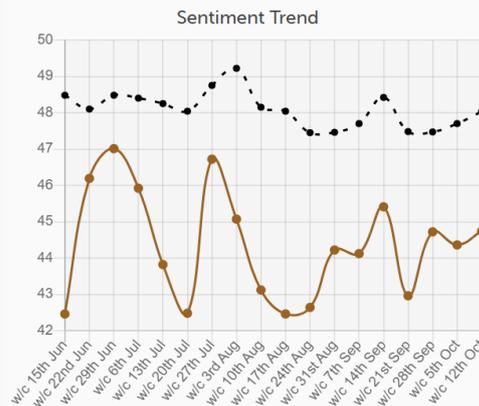
A power cut in September saw volume spike, and **sentiment dropped 8%** compared to the overall reporting period average.

**One to watch:** 4% of all tweets at Scottish Power mentioned a challenger brand, specifically Bulb and Octopus. 43% of these were recommendations and 19% were tweets to referral links.



Shell Energy came in at the bottom of our league table, receiving the **highest percentage (26%) of negative sentiment compared to other brands**. This saw Shell Energy sit substantially below the market average for the full duration of the reporting period.

	105 (5%)
	1,601 (70%)
	597 (26%)
<b>Total</b>	<b>2,303</b>



### Customer service

- 6% of complaints surrounding customer service were in relation to **email communication**. **Slow response times, ignored emails** and only receiving **automated responses** were the main bug bears.
- Customers complaining about slow response time when calling customer services made up 8% of the conversation. **58% of those tweets mentioned being on hold for at least an hour**.
- 30% of customer service related tweets referenced the service as **disgusting, shocking, terrible, poor or bad**.



### Final bill

7% of **customers tweeting about bills** were following up final bill requests as they had **grown impatient** with conventional customer communication.



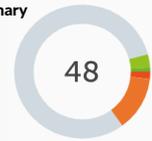
### New customers

14% of **new customers** tweeted about **issues with smart meters**, reporting issues logging an initial reading being the main problem.

**One to watch:** Door-to-door sales proved very unpopular, especially during a pandemic. Complaints were amplified by ignoring cold calling notices or working in areas with a lot of elderly residents.



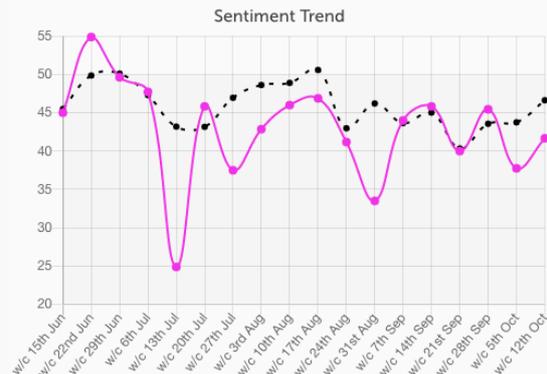
Sentiment  
summary



SSE's sixth place in the league table was determined by slightly below market average sentiment score throughout the reporting period. Conversations around customer service, boilers and repairs being a particular problematic area for customers.

### In (no) hot water

7% of all conversations around boilers and repairs during the reporting period were directed at SSE, who were bottom three in sentiment. 15% of the complaints were related to **customers being left without hot water**.



### Customer service

SSE received the most volume of tweets around customer service, and managed an above market average sentiment score. Coming fourth in the customer service league table.



#### On hold

17% of all mentions of being kept on hold was directed at SSE. **Many customers calling for a call back service** to avoid being on hold for "hours".



#### Vulnerable

56% of tweets regarding **concerns over services for the vulnerable** were doing so on behalf of an elderly friend, relative or neighbour.

**One to watch:** There were 34 instances where customers flagged that they were receiving automated messages that the office was closed inside of advertised call centre hours.

All this from a sample of Twitter data only.

Imagine what we could do if we layered social and customer data together!



## Discover the stories behind the data

### Objective measure of CX

Track and monitor changing customer expectations and shifts in priorities. Understand how seismic shifts in public opinion in impacting CX and what you can do to improve.

### Real-time text analysis

Monitor what your customers or the market are talking about right now and see the issues that are impacting sentiment or being talked about most.

### Better strategic decision-making

Quickly **prioritise service changes** and find the answer to a question you want answered or a hypothesis you need proving.

### Competitor insight & benchmarking

Measure how you are doing relative to the other brands in your space and spot opportunities to delight or where you need to improve.

# If you're not acting on what your customers say about you, speak to Wordnerds.

[wordnerds.ai/demo](https://wordnerds.ai/demo)

Abstract sentiment scores are meaningless. Social listening software is great for measuring impact but it won't tell you what people say.

**Wordnerds is different.**

Our linguistics-first approach to the latest AI/NLP techniques, produces a SaaS platform that genuinely understands language... in all its misspelt, sarcastic, colloquial glory.

We want you to truly understand what your customers and employees are saying and how they really feel.



 **wordnerds**