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Online reviews and customer satisfaction: The use of Trustpilot by UK retail energy suppliers and three other sectors

Stephen
Littlechild

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1. Introduction

Online consumer reviews are now widely used and influential. It is reported, for example, that 93% of consumers say online reviews impact their purchasing decisions, 86% say their buying decisions are influenced by negative online reviews, 91% of 18-34 year olds trust online reviews as much as personal recommendations, customers are willing to spend 31% more on a business with excellent reviews, 3.3 out of 5 stars is the minimum rating of a business that consumers would engage with, and only 13% of consumers will consider using a business that has a 1 or 2

* Emeritus Professor, University of Birmingham; Fellow, Cambridge Judge Business School; and Associate, Energy Policy Research Group at Cambridge. I am particularly grateful to EPRG editor David Reiner and a referee for many thoughtful comments and suggestions. I am also grateful to Eileen Marshall and several industry colleagues for helpful information and comments, to the MikeWhiskeyTanner website for its valuable information, and especially to Trustpilot for patiently and thoroughly responding to my questions and challenges. The views expressed here do not represent the views of any of the above or of any organisation with which I am associated.

star rating.¹ Marketing commentators offer companies “7 reasons online reviews are essential for your brand”.² The impact of such reviews is a topic for media discussion.³

There is growing academic examination of online review sites. To cite just a few studies, Dellarocas (2003) provided early analysis of such “large-scale word-of-mouth networks”. Duan et al (2008) found that “the rating of online user reviews has no significant impact on movies' box office revenues” but that the volume of online posting did have a significant impact, suggesting that review volume increased awareness. Li and Hitt (2008) showed that if early consumers have different preferences to later consumers, this can affect long-term consumer behaviour and consumer welfare. Vermuelen and Seegers (2009) found that “on average, exposure to online reviews enhances hotel consideration in consumers ... [and] These effects are stronger for lesser-known hotels.” Li and Hitt (2010) argued that uni-dimensional ratings can be substantially biased by price effects. Li et al (2011) noted that online reviews can reduce consumer uncertainty about products and therefore potentially increase demand and company profits, but can also increase switching, thereby intensifying competition and reducing profits, so that companies may have incentives to facilitate consumer reviews in some markets but not others. More recently, Helversen et al (2018) found that “students but not older adults were strongly influenced by average consumer ratings; in students positive and negative reviews overrode the effect of average ratings; older adults were influenced by negative single reviews but not by positive ones.”

There have also been competition concerns, and action by competition authorities, initially in the US. In the UK, the Competition and Markets Authority (CMA) became “aware of a number of concerns about the potential for reviews and endorsements to mislead consumers and distort their decisions”. (CMA 2015 para 1.2) It said that consumers found reviews valuable, but it was concerned about certain practices such as businesses commissioning fake positive or negative reviews, and cherry-picking good reviews and/or suppressing bad ones. It issued various recommendations for review site conduct. In June 2019 the CMA “launched a programme of work aimed at tackling fake and misleading online reviews”. In January it announced that “Facebook and eBay have taken action to tackle the trade of fake and misleading reviews on their websites” and in May 2020 it secured commitments from Instagram.

The academic studies just referenced focus on how customers respond to online reviews. The CMA work refers to inappropriate conduct by review sites. There does not seem to have been much examination of whether and how companies use such review sites for legitimate purposes, including by inviting online reviews, how effective this is in stimulating reviews and influencing ratings, and how this practice differs between sectors and over time. In the present paper, the aim

¹ Diana Kaemingk, 20 Online review stats to know in 2019, at www.qualtrics.com/blog/online-review-stats/ (citing 20 studies), April 9, 2019.

² Smith Willas, www.mention.com/en/blog/online-reviews/ updated March 6, 2020. The 7 reasons are 1 Social proof drives purchases, 2 They make you more visible, 3 They make you look trustworthy, 4 They expand the conversation about you, 5 They are increasingly essential to decision making, 6 They have a clear impact on sales, 7 They give you an open line to consumers.

³ E.g. Caroline Beaton, “Why You Can’t Really Trust Negative Online Reviews: Research suggests that people heed negative reviews more than positive ones - despite their questionable credibility”, *The New York Times*, June 13, 2018.

is to understand better the role of online reviews in the UK retail energy sector, and for context to look initially at three other consumer sectors: supermarkets, banking and mobile phones.

The top 10 consumer and business review websites in the US contain some well known names.⁴ But these are not necessarily the most popular review websites for all products and other countries. The review website that has by far the greatest number of reviews of UK energy suppliers is Trustpilot. This is a relatively new consumer review website, founded in Denmark in 2007 and launched in the UK in 2014. It hosts reviews of businesses worldwide and has grown rapidly in the UK to over 37 million reviews of over 97,000 UK business domain names.

Trustpilot's approach differs from the customer evaluations organised at periodic intervals or on request, where a structured set of questions is put to a customer panel chosen by the customer review website or by its client company, or by an organisation such as Which? or Uswitch. Rather, Trustpilot is an "open" website: any customer can review any company on Trustpilot without having to be invited (though many companies do invite reviews). Trustpilot accepts reviews as and when customers wish to provide them, on whatever topic the customers choose.

Briefly, Trustpilot shows customer views on around 100 UK energy supplier domains, with the number of reviews per supplier ranging from zero to over 30,000 in the last 12 months. These suppliers vary in size from under 10,000 to over 12 million customer accounts.⁵ The number of reviews per energy supplier customer also varies widely, from under one in five thousand customers for some companies to over one in ten customers for others. Something similar seems to be the case for the three other sectors examined in this paper.

Although Trustpilot is increasingly familiar to energy suppliers and to some energy customers, it is perhaps less familiar to regulatory analysts and policymakers. The present paper seeks to provide some background and insight into how Trustpilot works, how it is used in the UK retail energy sector and three other UK consumer sectors, and how this usage has evolved from 2019 to 2020. This is of interest in its own right, and also provides input into a companion paper (Littlechild 2020) that proposes using the average of four very different kinds of ratings (provided by Ofgem, Citizens Advice, the Consumers Association via Which? magazine, and Trustpilot) as a means of constructing, analyzing and publicizing an Overall Customer Service (OCS) score for UK energy suppliers.

Section Two of this paper explains how Trustpilot domains or profiles are established in the first place and then claimed (or left unclaimed) by the companies reviewed; how TrustScores are calculated; what unpaid and paid services Trustpilot provides and offers; and how reviews may be invited and also challenged.

⁴ One article lists them in the following order: Google, Amazon, Facebook, Yelp, Trip Advisor, Better Business Bureau, Yellowpages, Manta, Angies List, Foursquare. See Heidi Abramyk at www.vendasta.com/blog/top-10-customer-review-websites.

⁵ A customer account is a customer taking either gas or electricity from a supplier. A dual-fuel customer taking both fuels counts as two customer accounts.

Section Three sets out and compares the April 2019 TrustScores and numbers of reviews of companies in four UK consumer sectors: supermarkets, banking, mobile phones and retail energy supply. Section Four updates the comparison to June 2020.

Section Five compares the use of Trustpilot by size of energy supplier, and looks briefly at suppliers that went bankrupt and left the market. Section Six examines how some particular companies have used (or not used) Trustpilot. These are new and fast-growing Medium supplier Octopus Energy, two white label supermarket supplier brands, Small new entrant Engie, and the six former-incumbent Large energy suppliers. Over the last two years, all but one of these companies have eventually invited customer reviews, with generally favourable ratings, and have significantly increased their TrustScores.

Section Seven looks, for comparison, at Trustpilot reviews of UK energy consultants and energy switching sites, and also of charitable and regulatory organisations in the UK energy sector. It finds two very different pictures. Section Eight summarises and concludes.

Appendix One examines various concerns about review sites, particularly Trustpilot, as set out in an article in the *Sunday Times* in March 2019. Appendix Two contains more detailed Tables comparing the four sectors in June 2020. Given some concerns about invited reviews, Appendix Three briefly explores three alternative ways of ranking energy suppliers in the light of customer ratings, and notes the extent to which that would modify the ranking of energy suppliers. Appendix Four contains a table of customer ratings of energy supplier apps.

Part Two: How Trustpilot works

2.1 Why Trustpilot?

A recent article identified over 30 customer review platforms as ‘sources of feedback’ to Google in determining Search Engine Results Page (SERP) rankings, of which eight platforms were said to operate in the UK.⁶ These UK websites offer customers the ability to leave a review of a company and its products and service. With the exception of Trustpilot, their business model is that companies pay a subscription in exchange for the ability to solicit reviews from customers, and various other services. This may be done on a flat rate subscription (as many solicitations as desired) or pay per volume. In some cases the company provides a list of customers to the review website, in other cases the review website offers the facility to invite customers to leave a review, or to automatically send a review invitation to them after they make a purchase. In general, only customers invited by the company or the review website can leave a review, at a time of the company’s choosing.

In the case of Trustpilot, there is no charge to the company for the Trustpilot site, or for inviting reviews using a company’s own facilities. Trustpilot is also an “open” website where any

⁶ Matt Foster, “What are the best review platforms in the UK?” at www.distinctly.co/blog/what-are-the-best-review-platforms/. The seven UK platforms identified are bazaarvoice.com/uk, bizrate.co.uk, feefo.com, reviews.co.uk (also known as reviews.io), reevoo.com/en, trustedshops.eu, trustpilot.com and verified-reviews.co.uk.

customer can review any company at any time, without invitation.⁷ The Trustpilot business model is more about offering companies various additional paid services involving automation, integration and insights, as described below.

Google does not appear to carry out its own reviews of energy suppliers. Price comparison website Uswitch and Consumers' Association Which? magazine both rate some 17 to 35 energy suppliers, but these ratings are based on annual structured interviews, of about 17,000 and 8,000 customers, respectively, and customers' individual reviews and comments are not given. For almost all the eight UK customer review platforms mentioned above, the target audience is not energy customers.⁸

In fact, the only website (apart from Trustpilot) that seems to carry reviews of UK energy suppliers is Reviews.io. On 4 August 2020 it showed 3086 reviews of 37 energy suppliers. The number of reviews per supplier ranged from 1 to 740. Only 9 suppliers had more than 100 reviews, the mean was 83 reviews and the median was 11.5 reviews. In contrast, Trustpilot carries reviews of about 100 energy supplier domains. Table A2 below shows that, on 18 June 2020, Trustpilot had over 450,000 reviews of 65 such domains, ranging from 23 to over 47,000 reviews per supplier, with mean nearly 7000 reviews and median some 2000 reviews.

The better rated energy suppliers themselves routinely highlight on their websites their star rating on Trustpilot. Consider the 44 energy supplier domains listed in Table A1 below. As of 4 August 2020, precisely half of them (22) made reference to Trustpilot on their websites, generally mentioning their star rating and often including a few excerpts from reviews. All but one of these 22 subscribed to Trustpilot services.⁹ More interesting is how precisely are distinguished those particular suppliers that referenced Trustpilot and those that did not: two thirds (19) of the 28 domains that had a Trustpilot rating of Great or Excellent mentioned Trustpilot on their websites, while only 3 of the 16 domains with Average or lower ratings did so.¹⁰

⁷ As noted above, there have been concerns that companies or rivals can post positive or negative reviews on such open sites. It is not in Trustpilot's interest for this to happen or be perceived to happen. The company takes active steps to detect and prevent such malpractices, and supports the steps that the CMA has taken. It does not seem to be alleged that such false reviews are characteristic of Trustpilot.

⁸ Thus, Feefo's website lists six sectors, with 24 subcategories, none of which include energy supply. (It is a puzzle that just one energy supplier, Utility Point, makes reference on its website to a score of 4.8/5 on Feefo, said to be based on 2036 reviews including 37 verified by Feefo".) Banking is one subcategory but supermarkets/groceries and mobile phones are not. TrustedReviews focuses on mobile, computing, home tech, TV/audio, cameras and games <https://www.trustedreviews.com/> Reevoo lists some 40 client companies, only two of which are energy suppliers.

⁹ Adding the Trustpilot logo, TrustScore and some reviews to a company website is available via a free TrustBox. Additional marketing features are available for a fee. The one supplier that did not subscribe to Trustpilot (Yorkshire Electricity) simply mentioned Trustpilot along with Uswitch, Myutilitygenius and Citizens Advice, without explanation, above the phrase Four reasons to choose Yorkshire Electricity, followed by what appeared to be four other reasons.

¹⁰ Of the 9 high-rated domains that did not mention Trustpilot, 5 did not subscribe to Trustpilot (4 were relatively new with fewer than 500 reviews and 3 had fewer than 200 reviews). Of the 3 low-rated domains that did mention Trustpilot, one was the minimal reference from very recent entrant Yorkshire Electricity (see previous footnote) that had increased its rating from Average to Great between 18 June and 4 August 2020; the second was PFP Energy that had missed the Great categorisation by one decimal point; and the third was Scottish Power which also had another (preferred) domain that was rated Great.

2.2 Companies' use of Trustpilot services: claimed and unclaimed Trustpilot profiles

A company may establish its own Trustpilot profile, with a view to presenting itself to customers and inviting reviews. Alternatively, when a company is first reviewed on Trustpilot by a customer, this establishes a company profile, and the company has to decide whether to accept or “claim” that profile.¹¹ In either case the company does so by creating a free Trustpilot account page (it is then said to have a Trustpilot account even though no payment is made), and verifying the website address or domain. Once it has established or claimed its profile, the company can customise the profile page (e.g. to describe the business, select its category or categories and sub-categories of activity, and display promotion boxes or guarantee boxes), respond to existing reviews, send invitations to customers to provide reviews, and challenge or “flag” inappropriate reviews.

If a company does not claim a profile, it cannot do any of these things. Unclaimed profiles generally have very critical reviews, which are not balanced by supportive reviews.¹² They show no acknowledgement of the customer concerns expressed or any rebuttal by the company of inaccurate statements. Indeed, the profile itself may have inaccurate or inappropriate information – for example, a non-existent website address or a misclassification of the business activity or an unrepresentative summary of its activities or focus.¹³ Or the company may even have been non-existent for some years.

Trustpilot places great emphasis on enabling customers to share their experience, and is reluctant to place obstacles in their way. Where a company refuses to accept any profile, there may be no alternative to an unclaimed site. Yet a number of unclaimed sites seem to have been established erroneously, when the company being reviewed already has a claimed site. Confusion can then arise where a company has been reviewed under more than one website address or domain, and where the company has not claimed both profiles, and/or not taken steps to merge the profiles or to close down all but one, or to clarify the situation. In such cases two or more different TrustScores – sometimes quite different - can exist for reviews of the same company.¹⁴ Where a company has both a claimed and unclaimed profile, it is not clear why the company and/or

¹¹<https://support.trustpilot.com/hc/en-us/articles/202195588-How-can-I-review-a-company-that-is-not-listed-yet->

¹² For three sectors reviewed below, in April 2019, the median TrustScores (out of 10) for claimed versus unclaimed profiles were 2.75 v 2.5 for supermarkets, 6.4 v 1.55 for banks, and 5.8 v 2.8 for mobile phone providers.

¹³ So, for example, Ofgem currently has 50 reviews (47 of them Bad) on its own unclaimed profile which invites readers to visit the non-existent website ofgem.com. Marks and Spencer has 3268 reviews on its unclaimed profile which lists five categories of business, including wellness centre, but not including food and groceries. Natwest Bank has 100 reviews associated with the non-existent website natwestbank.co.uk. It has 2263 reviews on another unclaimed profile where its category of business is said to be insurance agency rather than bank. There is the same mis-categorisation for Santander's unclaimed profile. In contrast, Asda's unclaimed profile shows it as having 16 categories including insurance agency and wellness centre. Visitors to the unclaimed Clydesdale Bank site (99 reviews) are invited to contact the Kensington High Street branch. Since July 2020 the profiles say that “information [about the company profiled] may be provided by various external sources”, which have been commissioned by Trustpilot.

¹⁴ So for example, Shell Energy took over First Utility in April 2019 and had a TrustScore of 7.1 at shellenergy.co.uk with 40,182 reviews as at 28 August 2019. However, the site firstutility.co.uk was still active and unclaimed with a score of 1.0 based on 79 reviews, the latest then dated 20 August 2019. The situation with some other companies such as Scottish Power and SSE is more serious, as illustrated below.

Trustpilot does not take steps to close the unclaimed one, and indeed why Trustpilot does not take steps to prevent an inadvertent opening in the first place if there is already a claimed profile. There may also be scope to guide reviewers to the claimed profile, as some energy companies have done or are now doing.¹⁵

2.3 The calculation of TrustScores

As noted earlier, Trustpilot is an online ‘open’ consumer review website, so that any customer with a purchasing or service experience can leave a review of any business. Customers do not need to be invited by the business, nor are their views screened or approved by the business before being placed on line, nor is there any charge. Customers can give a review at whatever time suits them, with no permission required, no pre-moderation of the content and no delay in posting. Businesses and customers do, however, have to comply with the Guidelines that govern the platform.¹⁶

Customers rate companies from one to five stars (described as Bad, Poor, Average, Great [previously Good] and Excellent). Trustpilot calculates a time-weighted average of these ratings to give a single TrustScore for each company.¹⁷ Until September 2019 this was a score between zero and 10. As from September 2019 the TrustScore is in the range from 1 to 5, to be consistent with the customers’ ratings out of 5, and half stars were introduced in the overall ratings, said to be in line with industry practice.¹⁸ Both original scores and adjusted scores for pre-September 2019 are used in this paper, where the adjusted score for pre-September 2019 is calculated as $(1 + 0.4 \times \text{original score})$.

Trustpilot adjusts for the age of review: “the older a review is, the less it counts towards the overall TrustScore ... newer reviews always count for more than older ones”. Trustpilot does not make public precisely how this time-weighting works.¹⁹ Trustpilot also makes an adjustment to

¹⁵ Thus, E.ON has a claimed site at eonenergy.com with over 11,000 reviews. Another site for E.On.uk had a TrustScore of 5.2 out of 10 based on five reviews in 2018 but now explains that it is no longer possible to leave a review there. Two energy suppliers, Scottish Power and SSE, had each allowed two Trustpilot domains to continue to evolve on an ongoing basis, both having a significant number of reviews but with different TrustScores. The two companies subsequently decided that the .co.uk domains are the relevant ones for their retail businesses. (SSE had over twice as many reviews but a lower score on its .com domain and ScottishPower had about five times as many reviews and a comparable score on its .com domain.) SSE has recently put a note on the sse.com domain to say “sse.com belongs to SSE Group and is now a different company to the retail energy supplier sse.co.uk. If you want to review your experience for your retail energy supplier, please visit sse.co.uk”. Scottish Power encourages replies on its .co.uk domain but not on its .com domain.

¹⁶ <https://legal.trustpilot.com/>

¹⁷ <https://support.trustpilot.com/hc/en-us/articles/201748946->

¹⁸ <https://support.trustpilot.com/hc/en-us/articles/360023974013--Trustpilot-s-improved-star-rating-and-TrustScore-Everything-you-need-to-know>

¹⁹ One energy supplier conjectured (personal communication) that the discount factor for a review could be 0.995 to the power t where t is the number of days since the review. If the time-weighting were indeed of that form then a daily discount factor of 0.996 would imply that a review 6 months (182 days) ago would have a weighting of 0.48 times a review today. A review from a year ago would have a weight of 0.23 (about one quarter) and a review from two years ago a weight of 0.054 or just over one-twentieth of the weight of a review today. But note this is not Trustpilot’s own description of the calculation.

prevent extreme TrustScores for very new companies with few reviews. It does so by adding 7 extra reviews worth (now) 3.5 stars each.²⁰

In practice, TrustScores are recalculated every time a new review is filed. So for seldom-reviewed companies the TrustScores may not change for months, whereas for the most frequently-reviewed companies the TrustScore can actually change during the day.²¹

2.4 Subscribing for Trustpilot services and collecting Trustpilot reviews

As noted, Trustpilot offers companies a free basic starter package that enables them to customise their profile page, invite a limited number of reviews, collect and respond to Trustpilot reviews, show the TrustScores and reviews on their websites, and to challenge or “flag” inappropriate reviews (see below). It also offers a variety of additional paid services “to collect, respond, analyze, and showcase reviews to help improve all your sales and marketing efforts” and to obtain “more sophisticated insights about their customers that they [subscribing companies] can use to take action and thereby improve their business”.²² These include a facility for sending automatic review reminder emails, and analytics to track collection rates and changes in TrustScores. The level of the TrustScore and the date order of presentation of reviews on the profile page are independent of whether a company subscribes.

Trustpilot describes a company as “collecting” if it is sending out invitations to customers and actively collecting reviews of its own performance. As noted, Trustpilot offers both paid and unpaid services to this effect, which is how it is able to identify companies that Collect reviews. Most companies that subscribe to Trustpilot’s services use one of its collection facilities, though (as will be seen) a few companies actively encourage reviews but use their own facilities rather than Trustpilot’s paid collecting service. This may mean that the number of companies said to be

²⁰ “We use a Bayesian average in the calculation of the TrustScore to ensure that a company with few reviews starts off with a more balanced average TrustScore, instead of an extremely high or low score based on only a low volume of reviews. This means that in all TrustScore calculations we automatically include the value of 7 reviews worth 3.5 stars each. As the company collects more reviews this becomes a smaller factor in the calculation of the overall TrustScore.” <https://support.trustpilot.com/hc/en-us/articles/201748946-TrustScore-explained-How-is-the-TrustScore-calculated-> These 7 initial reviews are not discounted over time so they also impact on companies with many reviews that are mainly older reviews (which in some cases invalidates the claim that the value of the 7 initial reviews becomes a smaller factor in the calculation of the TrustScore).

²¹ The number of reviews shown on the Trustpilot category page (which summarises the scores of companies in that category) is updated daily hence may lag the number of reviews filed, as reported on a company’s own page. For example, at 4.26 pm on 26 June 2019 the Electric Supplier category page reported 19,067 reviews of Bulb Energy whereas the company’s own page recorded 19,127 reviews. Occasionally this may mean that the TrustScore on the category page lags the TrustScore on the company page by a decimal point.

²² “Companies can use feedback by taking and understanding where the customers’ engagement is and what the sentiment is, so they can basically fine-tune the marketing communications and focus on delivering more of what the customers want, based on the feedback that they had.” James Westlake, VP Trustpilot UK, Digital Marketing Magazine, posted in Digital Marketing Show Videos, 11 November 2015.

collecting understates the number that is actually collecting. As noted below, there may also be issues with the classification of reviews as organic or invited.²³

Trustpilot has Guidelines regarding invitations to submit reviews: “your invitation process and language should be fair, neutral and unbiased.” Invitations should not be done on a selective basis, and must not attempt to influence the nature of the review.

In the past, Trustpilot did not prohibit incentives to leave reviews, provided that this was declared to Trustpilot and shown on the company’s Trustpilot profile page. In practice such acknowledged incentives seem to have been rare: fewer than half a dozen out of the over 100 companies examined in this paper. However, “As from 1 August 2020, businesses will not be allowed to offer consumers incentives of any kind for reviews of any kind.” “You shouldn’t provide incentives like discounts, monetary rewards, loyalty points, gifts, coupons, referral bonuses and the like when asking for reviews.” This was one of seven steps that Trustpilot’s CEO outlined in June 2020, in reaffirming the company’s determination to maintain customer trust.²⁴ Further steps are constantly being introduced, for example on August 25, 2020, on how companies can collect reviews,²⁵ “continuing Trustpilot’s ambition to be the most trusted and transparent reviews platform globally”.

Because companies can invite reviews, a TrustScore might indicate not only customers’ perceptions of a company’s quality of service but also how actively the company has solicited reviews (and perhaps how flexibly it has interpreted ‘selective invitations’, although Trustpilot has taken action in the past to prevent inappropriate invitations). As will be seen, how actively companies solicit reviews varies considerably.

A customer review can be challenged (“flagged”) by a company (or by another customer) if it seems to contain various specified kinds of inappropriate content, or not to be by a genuine customer, or refers to some other company. Trustpilot will investigate and adjudicate, and may invite the reviewer to modify the content to secure compliance with the guidelines. In the last year or so, Trustpilot has begun to make more data available on each domain, for example showing the number of reviews over the last 12 months, the proportions with each star level, the proportions responded to and flagged, etc. As will be seen, in practice, only a small fraction of

²³ Trustpilot now shows the number of reviews that each domain has received in each of the previous 12 months, classified by nature of the review (organic, automated invitation or manual invitation) and by number of stars. In principle this further information is welcome but the accuracy of the classification seems to be a work in progress. For example, at one time, all of EDF’s 5500 reviews and Octopus Energy’s 19,000 reviews were said to be organic, which was implausible and inconsistent with the statements that “this company regularly asks their customers for reviews”. However, Trustpilot’s techniques and classification of reviews are constantly evolving and as of 30 July 2020 the Trustpilot sites no longer said that all of the reviews of these two companies were organic. It also seems that where companies quite legitimately issue manual invitations (e.g. in concluding responses to phone calls) rather than automated email invitations, this may not be picked up and classified as inviting (as for example with Sainsbury’s Energy, as set out in Section 6.4 below).

²⁴ <https://www.trustpilot.com/blog/trends-in-trust/our-trust-promise>

²⁵ <https://press.trustpilot.com/news/2020/8/25/trustpilot-updates-review-collection-methods-as-part-of-continued-drive-to-be-the-most-universally-trusted-review-platform>

reviews are generally flagged, but company policies vary. Trustpilot can and does also investigate reviews at its own initiative.²⁶

Part Three: Use of Trustpilot in four different consumer markets in April 2019

Consider now how companies in four different consumer sectors use (or ignore) Trustpilot.

3.1 Use of Trustpilot by supermarkets

Table 1 shows the Trustpilot reviews as of 1 April 2019 for 13 UK supermarkets (groceries, interpreted broadly to include online delivery of foodstuffs).²⁷ The mean number of reviews was 1717 per supermarket, median 1392. The mean TrustScore was 2.9, median 2.7, out of 10. Using Trustpilot’s own categories, all the supermarkets except for one online offering were rated as Poor or Bad by over 22,000 customers.²⁸

Table 1 Trustpilot reviews of supermarkets, 1 April 2019

Supermarket	TrustScore (0-10)	Number of reviews	Claimed?	Subscribes to Trustpilot?	Invites reviews?	Responds to reviews?
Morrisons Online	5.3 Average	2129	Yes	No	No	No
Ocado [Online]	4.7 Poor	3445	Yes	No	No	Yes
Waitrose	3.3 Poor	1220	No	No	No	No
Co-op	3.3 Poor	241	Yes	No	No	No
Aldi	3.1 Poor	1392	No	No	No	No
Tesco	2.9 Bad	3806	Yes	No	No	No
Marks & Spencer	2.7 Bad	1801	No	No	No	No
Morrisons	2.6 Bad	265	Yes	No	No	No
Iceland	2.5 Bad	939	Yes	No	No	No
Lidl	2.3 Bad	872	No	No	No	No
Sainsbury’s	2.0 Bad	1749	Yes	No	No	No
Sainsbury’s Online	1.8 Bad	104	No	No	No	No
Asda	1.3 Bad	4356	No	No	No	No
Total		22,319	7	0	0	1
Mean/Median	2.9/2.7	1717/1392	54%	0%	0%	8%

²⁶ Trustpilot says that its team of enforcement agents, investigators and fraud analysts is backed by advanced technology built by skilled data scientists, and this runs proactively 24/7 to filter (move offline) and flag reviews for the team’s consideration.

²⁷ For Asda, Tesco and Sainsbury’s, all of which have relatively high numbers of reviews, varying but significant proportions of the reviews seem to be about non-food products.

²⁸ Trustpilot categorises a review as Bad, Poor, Average, Good/Great or Excellent according as the reviewer gives 1,2,3,4 or 5 stars. Until September 2019, Trustpilot categorised a company in the same terms according as the TrustScore was 0.0 – 2.9 (Bad), 3.0 – 4.9 (Poor), 5.0 - 6.9 (Average), 7.0 - 8.9 (Good), 9.0 – 10.0 (Excellent). Since September 2019, the classification is 1-1.7 (Bad), 1.8-2.7 (Poor), 2.8-3.7 (Average), 3.8-4.2 (Great), 4.3-5.0 (Excellent).

Only about half the supermarkets had claimed their Trustpilot profile. They had higher mean and median TrustScores (3.3 versus 2.4 mean and 2.9 v 2.5 median). But they did little or nothing with the profile. None of them subscribed to Trustpilot's services or invited reviews, and only one of them responded to posts on its profile site.²⁹ Supermarkets are generally agreed to be a competitive market (even though the 'big four' account for about two thirds of sales and nine of the companies here account for about 95 per cent of sales). However, this seemed to be a market that took little or no notice of Trustpilot.

All the market participants are well established, with household names and millions of customers. Can they be unaware of these ratings? Perhaps they consider that it is not worth acknowledging or responding to these complaints, or that doing so might give the complaints more credibility or highlight the company's inability to prevent or remedy the problems complained about. If it is any consolation to the supermarkets, John Lewis and Partners, generally rated highly by customers, had 6625 reviews, more than any of the supermarkets, and had a TrustScore of only 1.9, worse than all but one of the supermarkets. It is surely significant that the two supermarkets with the notably higher TrustScores are both online businesses that do not have long-established customer bases, and that the only one that does respond to reviews (Ocado) does not have a physical High Street presence. They are presumably looking to build new custom, perhaps from a younger set of potential customers more attuned to use of the internet.

3.2 Use of Trustpilot by banks

Table 2 shows Trustpilot reviews of 30 banks on 2 April 2019. In contrast to supermarkets, many of these were relatively new (I confess that I had never heard of about three quarters of them).

The top dozen banks that had claimed their Trustpilot accounts were rated as Excellent or Good by their customers (average TrustScore around 8 out of 10). Some three quarters of them subscribed to Trustpilot services and collected reviews. On average, they had received around one or two thousand reviews to date, and all but two responded to at least some reviews. Their minimum TrustScore was way above the highest TrustScore of even the online supermarkets. These banks were all relatively new. Providing good customer service, and inviting evidence of it via Trustpilot reviews, seems to have been a way of attracting the attention of possible customers, and later of retaining customers in what was an increasingly competitive market.

Of the next dozen banks that had claimed their Trustpilot site, only a quarter subscribed to Trustpilot, only one asked for reviews. On average they had received about 500 reviews, and two thirds responded to at least some reviews. These banks were ranked from Average to Poor, on

²⁹ Each Trustpilot company site indicates whether the site is claimed, whether the company subscribes to Trustpilot or pays to access extra Trustpilot features, and whether it is inviting reviews. As noted earlier, there seems (to the author) to be some question about Trustpilot's ability to accurately classify whether and if so how a company is inviting reviews. In April 2019, Trustpilot did not state whether or to what extent a company responded so this judgement was based on the author's inspection of the recent reviews at that time. Trustpilot now gives the percentage of negative reviews in the last 12 months that received a response. In this as in other respects, Trustpilot's response tends to evolve fairly rapidly over time as it seeks to improve transparency. As of August 2020 it was rolling out significant changes to its platform, including to invitation methods and labelling.

average Bad (TrustScore around 3 out of 10). The more familiar and longer established banks were generally ranked in the bottom half of this dozen.

Table 2 Trustpilot reviews of banks, 2 April 2019

Bank	TrustScore	Number of reviews	Subscribes to Trustpilot?	Collects reviews?	Responds to reviews?
Top Half of claimed domains					
Atom Bank	9.2 Excellent	2472	Yes	Yes	Yes
Monese	9.1 Excellent	9347	Yes	Yes	No
Starling Bank	8.8 Good	2919	Yes	Yes	Some
U Account	8.5 Good	4080	Yes	Yes	Yes
Thinkmoney Current Account	8.5 Good	1327	Yes	Yes	Yes
Shawbrook Bank	8.5 Good	892	No	No	No
Monzo	8.1 Good	1050	Yes	Yes	Some
Secure Trust Bank PLC	7.5 Good	85	Yes	Yes	Yes
Tide Banking	7.4 Good	954	Yes	Yes	Some
Tandem	7.3 Good	337	No	No	Some
Loot Financial Services Ltd	7.1 Good	569	Yes	Yes	Yes
Metro Bank	7.0 Good	888	No	Yes	Yes
Mean	7.9 Good	2077	75%	83%	83%
Median	8.3 Good	1002			
Bottom Half of claimed domains					
myKredit	5.8 Average	42	No	No	No
Sainsbury's Bank	5.2 Average	794	Yes	No	No
Charter Savings Bank	5.0 Average	25	No	No	Yes
CoinsBank	4.4 Poor	21	No	No	Some
First Direct	4.2 Poor	957	No	No	Yes
The Co-operative Bank	3.5 Poor	464	Yes	Yes	Yes
Aldermore Bank	2.8 Bad	37	No	No	Some
Barclays	1.5 Bad	1345	No	No	No
Smile UK	1.3 Bad	233	No	No	Yes
Virgin Money UK	1.1 Bad	635	No	No	Yes
Tescobank	1.0 Bad	521	No	No	No
HSBC	1.0 Bad	1599	Yes	No	Yes
Mean	3.1 Poor	556	25%	8%	67%
Median	3.15 Poor	493			
Unclaimed domains					
Yorkshire Bank	2.0 Bad	83			
LLoyds	1.8 Bad	370			
Bank of Scotland	1.8 Bad	92			
Natwest	1.3 Bad	1241			
Santander	1.2 Bad	1453			
Royal Bank of Scotland	1.0 Bad	235			
Mean	1.5 Bad	579	0%	0%	0%
Median	1.55 Bad	303			
Overall	4.7 Median	Med 607	40% Yes	37% Yes	53% Yes

Finally, there were 6 banks that had not claimed their Trustpilot accounts, and therefore had no interaction with reviews. They were largely well-known and long-established businesses, like the established High Street supermarkets. They were all rated Bad on Trustpilot (average TrustScore 1.5 out of 10). Thus, in the banking sector, in contrast to the supermarket sector, there was a dramatic difference between the competitors with respect to use of Trustpilot, and associated TrustScores. There was also a significant difference in number of reviews in relation to number of customers where invitations were not sent out. Thus, the relatively new and small Shawbrook Bank attracted 892 reviews, two thirds as many as Barclays, which is the second largest bank in the country. A significant difference between the supermarket and banking sector seems to be that a significant part of the latter is now an online market, with an extensive fringe of small competitors, whereas supermarkets for the most part are not online and the largest six supermarkets, for example, have a higher proportion of the total market than the six largest banks do. More on this below.

3.3 Use of Trustpilot by mobile phone providers

Table 3 shows the results of some 40,000 Trustpilot reviews of 17 mobile phone providers in April 2019. They are largely the providers rated by Which? magazine (see below).

Table 3 Trustpilot reviews of mobile phone providers, 23 April 2019³⁰

Mobile phone provider	TrustScore (out of 10)	Number reviews	Claimed?	Subscribes to Trustpilot?	Asks?	Which? rating %
SMARTY	8.8 Great	2,865	Yes	Yes	Yes	-
UtilityWarehouse	8.0 Great	7,202	Yes	Yes	Yes	81
Giffgaff	7.3 Great	1,840	Yes	Yes	No	87
Asda Mobile	6.7 Average	14	No	No	No	77
iD Mobile	6.3 Average	3,085	Yes	No	Yes	70
Lebara Mobile UK	5.8 Average	1,491	Yes	Yes	No	-
Voxi	4.3 Poor	133	No	No	No	-
Tesco Mobile	4.2 Poor	578	Yes	No	No	79
Three (L)	4.0 Poor	8,010	Yes	Yes	No	69
Talkmobile/Vodafone	2.6 Bad	1,158	Yes	No	No	-
EE (L) *	2.0 Bad	3334	Yes	No	No	56
O2 (L)	1.3 Bad	3,167	No	No	No	62
Sky Mobile *	1.0 Bad	3369	No	No	No	76
Plusnet Mobile *	0.85 Bad	4234	Yes	No	No	80
Vodafone UK (L)	0.8 Bad	7,568	Yes	No	No	51
BT Mobile *	0.7 Bad	5174	Yes	Yes	No	65
Virgin Mobile	0.6 Bad	1,189	Yes	No	No	64
Mean	3.6 Poor	3,201	76% Yes	35% Yes	18%	
Median	4.0 Poor	3,085				

³⁰ There is an element of estimation for the four companies marked * since it was initially unclear which of several claimed and unclaimed profiles should be used.

The TrustScores range from 8.8 down to 0.6. None were classed as Excellent. Of the six providers classed as Great or Average, five (83%) had claimed their profile, four (67%) subscribed to Trustpilot, and half invited reviews. In contrast, of the eleven providers in the Poor and Bad categories, eight (73%) had claimed their profile, only two (18%) subscribed to Trustpilot, and none invited reviews.

The four Large providers (EE, Vodafone, O2 and Three, marked L) own networks that are slices of the UK spectrum. All the other smaller and newer mobile providers (so-called Mobile Virtual Network Operators or MVNOs) have to partner with one of these Large networks. The four Large providers are all in the lower half of Table 5: one is ranked Poor and the other three Bad. Three of them had claimed their profile, one subscribed, none invited reviews. In contrast, of the 13 smaller providers, 10 had claimed their profile, 5 subscribed and 3 invited reviews. In short, it is a similar story as in banks: smaller entrants make more use of Trustpilot than large incumbents.

How far are these TrustScores consistent with other ratings of mobile providers? In January and February 2019 the Consumers' Association Which? magazine asked 6,135 members to rate 13 mobile phone providers.³¹ The last column of Table 3 shows the overall customer score of Which? members. Giffgaff was ranked the best provider, Vodafone the worst. The four Large providers took the bottom three positions and four of the bottom six. Which? commented "... we found, yet again, that the 'big four' mobile networks ... largely fail to give the level of service people want".³² The correlation coefficient between the Which? ratings, which were based on customer scores, and the TrustScore ratings, is quite high at 61%.

3.4 Use of Trustpilot by retail energy suppliers

Table 4 shows comparable April 2019 data for 26 energy suppliers studied elsewhere (Littlechild 2020), that are sufficiently established to have been reviewed and rated by both Citizens Advice and Which? magazine. In that sense they are more established than the newer banks reviewed above, but perhaps comparable to the mobile operators.

As of 8 April 2019, the mean TrustScore was 6.2 Average, median 7.0 Good, which is higher than for the other three sectors. The range of TrustScores was more extensive: from 0.3 to 9.6. The average number of reviews per energy supplier was 6348 (mean), 3529 (median), which was again higher than for the other sectors. The total number of reviews to that date per energy supplier ranged from 556 (Engie) to over 35,000 (Shell Energy, formerly First Utility).

³¹ "Best and worst UK mobile networks", Hamse Yusuf at <https://www.which.co.uk/reviews/mobile-phone-providers/article/best-mobile-networks-overview>, 23 April 2019, and in *Which? Magazine*, May 2019, pp 39-43. The providers were given from one to five stars on six categories, viz customer service, ease of contact, incentives, value for money, technical support, and value for money when roaming. They were then ranked on an overall percentage customer score. Three other providers, presumably smaller and newer and not ranked by Which?, are included in the top half of Table 3 because they make a further appearance the next year.

³² Elsewhere the results were summarised as "Britain's largest mobile phone operators offer poorer customer care and technical support than their smaller rivals, despite being more expensive." "Biggest phone firms beaten by small rivals on customer care", Greg Hurst, *The Times*, April 23, 2019, p 2.

Table 4 Trustpilot reviews of energy suppliers, 8 April 2019

Size of supplier	Supplier	Trust Score	Number of Reviews	Claimed?	Subscribes?	Asks?	Responds ?
M	Bulb	9.6 E	14,747	Yes	Yes	Yes	Some
M	Octopus Energy	9.6 E	8,959	Yes	Yes	Yes	Some
S+	So Energy	9.4 E	1,960	Yes	Yes	Yes	Some
S+	Engie	9.2 E	556	Yes	Yes	Yes	Yes
M	Avro Energy	9.1 E	16,774	Yes	Yes	Yes	No
S+	Tonik Energy	8.9 G	2,803	Yes	Yes	Yes	Some
M	Ovo	8.5 G	25,017	Yes	Yes	Yes	Some
M	Utility Warehouse	8.0 G	7,155	Yes	Yes	Yes	Some
S+	Robin Hood Energy	8.0 G	1,833	Yes	Yes	Yes	Yes
M	Green Network Energy	7.9 G	2,391	Yes	Yes	Yes	Yes
S+	Bristol Energy	7.5 G	852	Yes	Yes	Yes	Some
S-	Flow	7.4 G	5,021	Yes	Yes	Yes	Yes
S-	iSupply	7.1 G	6,224	Yes	Yes	Yes	Yes
M	Shell Energy	6.9 A	35,136	Yes	Yes	Yes	Yes
L	EDF	6.3 A	2,397	Yes	Yes	Yes	Yes
M	Co-op Energy	6.3 A	909	Yes	Yes	Yes	Some
S+	Ecotricity	6.2 A	772	Yes	No	No	Some
M	Utilita	6.1 A	5,782	Yes	Yes	Yes	Yes
M	Green Star Energy	5.0 A	3,682	Yes	Yes	Yes	Yes
S+	Together Energy	4.8 P	3,961	Yes	Yes	Yes	No
S-	Solarplicity	4.2 P	5,794	Yes	Yes	Yes	Yes
L	British Gas	2.1 B	4,904	Yes	Yes	Yes	Yes
L	SSE	1.4 B	590	Yes	No	No	No
L	E.On Energy	1.1 B	1,681	Yes	Yes	No	Yes
L	nPower	0.5 B	1,795	Yes	No	No	No
L	Scottish Power	0.3 B	2,848	Yes	No	No	No
	Mean	6.2 A	6,348	100% Yes	85% Yes	81%* Yes	81% Yes or Some
	Median	7.0 G	3,529				

All these energy suppliers had claimed their Trustpilot profiles. All but five were collecting reviews.³³ All but four of the suppliers subscribed to Trustpilot’s commercial services (and three of these began to do so not long after 8 April). All but five of the suppliers responded to some or all reviews. So these 26 energy suppliers and their customers were, in general, more attuned to the use of Trustpilot than companies and customers in the other three sectors. Table 4 also makes reference to size of supplier: the relationship between Trustpilot activities and size of supplier is discussed below.³⁴

³³ One of the then-reported non-collectors, Octopus Energy, actively collected reviews using its own facilities instead of Trustpilot’s.

³⁴ Size categories in Table 4 are Large L, over 3000k customer accounts, Medium M 300 – 3000k accounts, Small Plus S+ 150-300k accounts, Small Minus S- 11 – 150k accounts, Very Small VS 1-10k accounts.

Part Four: Use of Trustpilot in these markets in June 2020

The use of Trustpilot in these four markets was reexamined 14 months later, in June 2020. The results are briefly discussed here, although, because of their size, the corresponding tables A1 to A4 are in Appendix 2.

4.1 Supermarkets

Table A1 suggests that satisfaction with supermarkets may be slightly higher insofar as five of them are now rated Poor rather than Bad, and Ocado is up from Poor to Great. This is offset by Morrisons online falling from Average to Poor. However, these reclassifications may in part be an artifact of Trustpilot's revised scoring system. There is some very limited evidence of increased sensitivity to Trustpilot. One additional domain (Waitrose) has been claimed although one (Sainsbury's Online) has been closed. None of the supermarkets yet subscribes to Trustpilot, but now two rather than one (the more upmarket companies Ocado and Waitrose) respond to posted reviews and Ocado is now asking for reviews. Trustpilot now shows (for all company profiles) the number of reviews in the last 12 months, and the percentage that receive replies. In the last 12 months Ocado has received 7753 reviews, two thirds of the total that it received since it claimed the domain six years earlier, amounting to some 39% of all reviews received by these supermarkets in the last year. This change in stance, to include invited reviews, no doubt largely explains its increased TrustScore.

4.2 Banks

Table A2 shows that some 40 companies have now claimed their Trustpilot accounts and classify themselves as a Bank.³⁵ Trustpilot now shows the dates when companies claimed their profiles or accounts. The number of banks claiming their Trustpilot accounts evidently increased quite steadily over time, perhaps at an increasing rate: 1 in 2014, 3 in 2015, about 8 per year from 2016 to 2018, and 12 in 2019.

Of the 20 banks that now score Excellent or Great, 75% subscribe to Trustpilot, a slightly higher proportion than in the previous year, and all but two ask for reviews. The number of reviews in the last 12 months varies enormously, from 24 to 8436, with a median of 507. Four fifths of these banks respond to reviews, and the median response rate of the responding banks is said to be 79% of all reviews.

Of the 21 banks that scored Average or worse, and that claimed their site, only a quarter subscribe to Trustpilot, only two ask for reviews. Here too, in the last 12 months the number of reviews per bank ranged very widely, from 3 to 1281, median only 128. Three quarters responded to at least some reviews, and the median response rate of those who did respond was again high, at 81%, both about the same as for top half banks.

³⁵ This excludes a bank that is no longer functioning (Loot) and about a dozen that are overseas or have received fewer than 25 reviews. It includes one of the UK's largest banks HSBC, which has claimed its profile, but oddly classifies itself as an Insurance Agency. It subscribes to Trustpilot, and in the last year responded to no less than 79% of its 1251 reviews, but still found itself with a TrustScore of only 1.4 Bad

Finally, 8 banks, including some of the most famous names in UK banking, are associated with 11 domain names and have accumulated a total of 2814 reviews over the last year, but these banks have still not claimed their Trustpilot accounts and responded to these customers. Almost all get critical reviews and are classed as Poor in terms of TrustScore. One is said by someone – Trustpilot or its agent? – to be a Bank, two are said to be Insurance Agencies, others have no category but again someone has nonetheless extracted information from their websites (denoted Blurb in Table A2) to identify them. Or in one case, just to provide an address. As with the older-established supermarkets, the older-established banks do not seem to care about their image on Trustpilot, and by adding material to such unclaimed sites Trustpilot seems to encourage their use.

4.3 Mobile phone providers

Table A3 shows the June 2020 situation for 22 mobile phone providers. These are the providers reviewed by the website 4G in January and February 2020.³⁶ The website reviews compare 4G networks mainly in terms of coverage and payment plans. They also make reference to TrustScores in commenting on customer service, but a quick calculation reveals that there is zero correlation between the two sets of ratings. As before, those providers with higher TrustScores are more active on Trustpilot. Thus, of the 11 providers rated Average or better, 9 claimed their profile, 9 subscribed to Trustpilot, 7 invited reviews and 9 responded to reviews. In contrast, of the 11 providers rated Poor or Bad (which includes the four Large networks), 10 claimed their profile, 7 subscribed, only 1 invited reviews, and 5 responded to reviews.

4.4 Energy suppliers

Similar data as for the other sectors were collected for three different sets of energy suppliers on 18 June 2020. Table A4.1 shows the findings for 25 domains.³⁷ There is still a wide range of TrustScores and numbers of reviews, but a very active use of Trustpilot: all the domains are claimed, 88% subscribe, 80% ask for reviews, all but three respond to some reviews, median response rate is 37% of reviews, all but three have flagged at least one review.

Table A4.2 shows the findings for 44 energy supplier domains, being the same 25 domains plus other small suppliers that are large enough for Ofgem to report complaint statistics (or that volunteer to do so). Table A4.3 shows the findings for 66 energy supplier domains, being all those energy supplier domains that posted at least 20 Trustpilot reviews over the last 12 months. The results are similar.

4.5 Comparing Trustpilot reviews of four sectors April 2019 and June 2020

Table 5 summarises the main characteristics of all four sectors at both points in time. The main findings, as indicated earlier, are as follows.

First, with respect to Trustpilot, in both years the supermarket sector was and is less active than the other three sectors, and the energy sector was and is more active. This was with respect to

³⁶ <https://www.4g.co.uk/coverage/> excluding The People's Operator (TPO) which left the market in 2019.

³⁷ These are the previous set of 26 suppliers less three that left the market (Engie, Flow and Solarplicity) plus two additional unclaimed domains (for SSE and Scottish Power) that were previously not included.

almost all parameters: percentage of domains claimed, subscribing to Trustpilot, asking for reviews by customers and responding to them. However, the median number of reviews per company was lowest in the banking sector

Table 5 Trustpilot reviews of four sectors in April 2019 and June 2020

Sector	Supermarkets	Banks	Mobiles	Energy suppliers		
April 2019						
Number of domains	13	30	17	26		
Range of scores	1.3 – 5.3	1.0 – 9.2	0.6 – 8.8	0.3 – 9.6		
Median Score	2.7/10 Bad	4.7/10 Poor	4.0/10 Poor	7.0/10 Good		
Range of total reviews	104-4,356	21-9,347	14-8010	556-35,136		
Median total reviews	1,392	607	3,085	3,529		
% domains claimed	54%	80%	76%	100%		
% domains subscribing	0%	40%	35%	85%		
% domains inviting	0%	37%	18%	81%		
% domains responding	8%	53%	n/a	81%		
June 2020						
No. of domains	12	52	22	25	44	66
Range of scores	1.7 - 4.2	1.3 - 4.7	1.2 – 4.5	1.1-4.8	1.1-4.8	1.1-4.9
Median Score	2.15/5 Poor	2.75/5 Poor-Ave	2.7/5 Poor	3.8/5 Good	4.1/5 Good	4.1/5 Good
Range of total reviews	554-11,376	16-15,648	13-50,172	911- 47,608	1- 47,608	23- 47,608
Median total reviews	2,753	532	3,628	7,813	2,580	2,004
Median reviews 12 mos	1,188	271	991	2,962	1,193	870
Range reviews 12 mos	286-7,753	3-8,436	3-16,612	313- 28,119	1- 28,119	23- 28,119
% domains claimed	67%	79%	91%	100%	96%	100%
% domains subscribing	0%	39%	73%	88%	76%	79%
% domains inviting	8%	37%	36%	80%	71%	73%
% domains responding	17%	48%	64%	88%	87%	92%

Second, all four sectors were more active in June 2020 than they were a year earlier. For supermarkets, this was reflected in the same companies being a little more active. For banks, a larger number of companies were as involved as a smaller number had been earlier. For mobiles there was much more activity by a somewhat larger number of companies. For energy suppliers, all these indications of more activity applied.

The change in Trustpilot’s scoring system in September 2019 makes it more difficult to assess whether customer satisfaction has changed over time. Note, however, that the median categorisation improved from Bad to Poor (supermarkets) and from Poor to borderline Poor-Average for banks. Some might argue that this just means that more companies are getting better at “playing the review game”: that is, at inviting reviews, particularly at times when the reviews are likely to be favourable. However, uninvited views alone do not give a representative picture

of customer satisfaction. As will be seen below, inviting customer views can be a means of discovering and better providing what customers want. It also seems to be associated with new entrants into the market, and with response to those entrants - that is, with more competition.

4.6 Relating Trustpilot activity to market shares

Is Trustpilot a competitive route chosen by smaller challenger companies and shunned by larger more established incumbent companies in any sector? To explore this, Table 6 summarises the use of Trustpilot by the nine or ten largest companies in each of the four sectors. In each sector the top half dozen or so of these companies are relatively established, the smaller ones are relatively new entrants (but successful entrants relative to those that are too small to make it into the table). For the first three sectors these companies account in aggregate for between 96% and 100% of the market, for energy supply rather lower at about 83%.³⁸

Four of the six largest and most established supermarkets claimed their profiles in both years, but they engaged in no other Trustpilot activity. The limited further Trustpilot action, not subscribing and mainly replying to some reviews, was by two smaller companies, with market shares of 5.1% and 1.4%.

Only three established banks claimed their profiles in 2019, only one more in 2020. Two of the three banks that did claim in 2019 had market shares of 5.7% and 3.7%. These banks were a little more active than those in the supermarket sector, with two subscribing and three replying to and/or flagging reviews. The latter two activities do not seem to have been associated with market share, but more spread across the spectrum.

A slightly higher proportion of established mobile networks claimed their profile in 2019 than for supermarkets and banks, but not noticeably associated with the smaller networks. A significant increase in activity in 2020 was perhaps not particularly associated with size of network, although three of the largest networks (BT Mobile, EE and O2) neither invited nor flagged reviews, and two of the smallest networks (Talk Talk and iD Mobile, engaged in all Trustpilot activities studied here.

In the energy sector, in contrast to the other three sectors, all six established suppliers, plus three new entrants, had claimed their domains by 2019, and there was considerable involvement in other Trustpilot activities. The three entrants, with market shares between 4% and 5.1%, were active in all respects. The three out of nine companies that did not subscribe or reply to reviews in 2019, and the four that did not invite reviews, were larger established companies with market

³⁸ These market share figures are not claimed to be accurate, and in the energy sector, especially, are constantly changing, but they are best that seem to be publicly available and will suffice for the purpose at hand. Sources: Grocery market shares in GB, October 2019 at [statista.com](https://www.statista.com). Banking market shares based on number of current accounts 2017 at [economicsonline.co.uk](https://www.economicsonline.co.uk) from [statista.com](https://www.statista.com) and OFT. Market shares held by mobile operators in the United Kingdom (UK) 2018, by subscriber, at [statista](https://www.statista.com). Energy supplier market shares from Ofgem data portal, Q4 2019.

shares in the range 6.3% to 11.1%.³⁹ By 2020, all but one established company were engaging in almost all these activities.

Table 6 Use of Trustpilot by more established companies

Date	Mkt share %	April 2019				June 2020				
		claims	subs	asks	replies	claims	subs	asks	replies	flags
Supermarkets										
Tesco	27	√				√				
Sainsbury's	15.3	√				√				
Asda	15									
Morrisons	9.9	√				√				
Aldi	8.1									
Cooperative	6.6	√				√				
Lidl	6									
Waitrose	5.1					√			√	√
Iceland	2.1	√				√				
Ocado	1.4	√			√	√		?	√	
Total	96.5									
Banks										
Lloyds	19.3									
Barclays	17.1	√				√			√	√
RBS	13.6									
Nationwide	10.8					√				√
Santander	10.0									
HSBC	5.7	√	√		√	√	√	?	√	√
Natwest	5.4									
Yorkshire Bank	4.3									
TSB	3.7	√	?		√	√	√		√	
Total	98.9									
Mobile Networks										
BT Mobile	28	√	√			√	√			
EE	Incl in BT 28	√				√	√		√	
O2	26									
Vodafone	21	√				√	√		√	√
Three	12	√	√			√	√	√	√	√
Tesco Mobile	6	√				√	√		√	√
VirginMobile	4	√				√	√			
Talk Talk	1					√	√	√	√	√
iD Mobile	1	√		√		√	√	√	√	√
Sky	1									
Total	100									
Energy suppliers										
British Gas	22.8	√	√	√	√	√	√	√	√	√
E.ON	11.1	√	√		√	√	√	√	√	√
SSE.co.uk	10.9	√				√	√	√	√	
SSE.com		√				√				
EDF	9.7	√	√	√	√	√	√	√	√	√
Scottish Power.co.uk	8.6	√				√	√	√	√	√
Scottish Power.com		√				√	√		√	√
nPower	6.3	√				√			√	
Bulb	5.1	√	√	√	√	√	√	√	√	√
Octopus	4.3	√	√	√	√	√	√	√	√	√
Ovo	4.0	√	√	√	√	√	√	√	√	√
Total	82.8									

³⁹ The picture is slightly complicated because two energy suppliers (SSE and Scottish Power) had each allowed and eventually claimed two domains on Trustpilot.

There is thus considerable variation by sector, and what stands out is how much more active is the retail energy supply sector.⁴⁰ Claims that this market is not competitive, and that the large incumbents are not responsive to customers, therefore seem unwarranted - at least, if the benchmark is not some theoretical or ideal market, but rather how sensitive companies are to customer views in actual real competitive markets. Indeed, some of the larger and older established supermarkets and banks seem much more out of touch with the customers that use Trustpilot, seem heedless of their complaints, may not even acknowledge the existence of Trustpilot, and get very poor TrustScores.

How to summarise Table 6 and draw some conclusions about the use of Trustpilot in relation to firm size and, more especially, market share? Table 7 is based on a very simplistic calculation: for each company add the total number of ticks, out of 4 in 2019 and 5 in 2020, then group them roughly in quartiles according to the market share of the company. The median company had just over 8% market share, engaged in one Trustpilot activity in April 2019 (typically claiming the company profile) and just over two such activities in July 2020. But are the established companies with higher market share typically less active than the companies with lower market share? Answer, some of them are.

Table 7 Median involvement in Trustpilot activities

Range of market shares	Median market share	Median score April 2019	Median score June 2020	
13.6 – 28.0%	21%	1.0	1.0	
8.1 – 12.0%	10%	1.0	4.0	
5.1 – 6.6%	5.9%	1.0	2.0	
1.0 – 4.3	2.9%	1.5	2.8	
Overall 1.0 – 28%	8.35%	1.0	2.25	

More specifically, in April 2019, for all but the smallest quartile of companies by market share – that is, for those with a market share exceeding 5% - the median involvement was just one item of Trustpilot activity. For the smallest quartile of companies – market share roughly 1% to 4% - the median involvement was one and a half items of activity. So the smallest companies were indeed pioneering, but in a very limited way. In June 2020, for the largest quartile companies – with market share over 13% - claiming the company profile was still the median involvement. For the third quartile by size – market share about 5% to 7% - the median involvement was two Trustpilot activities, and for the smallest quartile it was nearly 3 activities. But the greatest involvement of all was by companies in the second quartile – about 8% to 12% market share - who had a median involvement in 4 out of the 5 activities. (It was somewhat on a knife-edge though: on one side four companies scoring 5 and on the other side four companies scoring 0, 0, 1 and 2.)

⁴⁰ Moreover, if Table 6 had been extended to include smaller energy companies with market shares of 1% to 3%, these would have been relatively active with respect to Trustpilot and would have increased to activity rates for the smallest quartile.

Admittedly, these comparisons and calculations are rather rough-and-ready, but they do seem to suggest that smaller entrants tend to be more responsive to Trustpilot than larger more established companies. However, there is no simple linear relationship in terms of market share, there is variation by sector as noted, and the situation is evolving significantly over time.

Part Five: Comparing Trustpilot use by size of energy supplier

5.1 Usage and size in April 2019

Table 4 above showed that, in April 2019, the five bottom places in the ranking of energy suppliers were occupied by Large (L) former incumbent companies, with TrustScores of 2.1 down to 0.3; their median TrustScore was only 1.25. Medium (M) and Small (S) companies were spread throughout the rest of the table. Table 8 provides further analysis. TrustScores of Medium suppliers ranged from 9.6 down to 5.0 (median 7.95) and those of Small Plus (S+) suppliers ranged slightly lower from 9.4 down to 4.8 (median 7.75). The two Small Minus (S-) companies had TrustScores of 7.4 and 4.2 (median 5.8). Thus, setting aside the Large (former incumbent) suppliers with very low TrustScores, the TrustScores for new entrant suppliers seemed to increase with size of company (and by that criterion were higher for more successful suppliers). However, this observation should be treated with caution: although a linear regression of TrustScore against actual supplier size (see below) for the 20 non-Large suppliers suggested a positive relationship, it was not one that was statistically significant (t-statistic 1.4).

Table 8 TrustScores, size of supplier and number of reviews, 8 April 2019

Size of supplier ⁴¹	Number of customer accounts per supplier	Number of suppliers	Mean TrustScore	Median TrustScore	Mean Number of Reviews	Median Number of Reviews
Large L	3m – 12 m	6	1.95	1.25	2,369	2,096
Medium M	300k – 3m	10	7.7	7.95	12,055	8,057
Small Plus S+	150-300k	8	7.6	7.75	2,865	1,897
Small Minus S-	11- 100k	2	5.8	5.8	5,408	5,408
All suppliers		26	6.2	7.0	6,348	3,529

Medium suppliers had received by far the most reviews: median over 8,000 reviews per supplier, compared with around 2,000 for Large suppliers (most of which suppliers were not actively collecting/inviting reviews at the time) and just under 2,000 for Small Plus suppliers. A large number of reviews was thus associated with new suppliers that had grown substantially and successfully.⁴²

⁴¹ Numbers of customer accounts is estimated from various sources including Ofgem data portal, Cornwall Insight Supplier Insight Service Reports, industry contacts and online information.

⁴² The two Small Minus suppliers had high numbers (over 5,000) but the sample was too small to be indicative. Flow had been acquired by Cooperative Energy the previous year, when it had 130,000 customers, hence some 38.6 reviews per thousand customers. Solarplicity went bust in August 2019, at which point it had only 7,500 customers, but in first quarter 2019 it had between 50,000 and 150,000 customers, hence some 38.6 to 115.9 reviews per

Suppliers with a social or environmental objective evidently did not get (and perhaps did not seek) many reviews. Co-operative Energy, Bristol Energy, and Ecotricity averaged only 844 reviews each; Robin Hood Energy had 1833.

At the other end of the spectrum, four Medium energy suppliers - Bulb, Ovo, Avro Energy and Shell Energy - averaged nearly 23,000 reviews each. This was more than double the number of reviews of even the most reviewed bank (Monese at 9347), and approximately three times the number of reviews of the most reviewed mobile phone provider and supermarket (respectively Three at 8010 and John Lewis at 6625).

Leaving aside Engie (discussed below), the remaining 17 energy suppliers averaged 4028 reviews each (median 3682). This was about double the average number of reviews of even the most active banks. Energy suppliers thus generated, on average, significantly more reviews than companies in the three other sectors.

There was no obvious relationship between number of reviews and TrustScore: more striking was the diversity in number of reviews. Nor was the number of reviews directly or even roughly proportionate to number of customers. For example, SSE was the third largest supplier by number of customers, but had the second lowest number of reviews.

5.2 Usage and size in June 2020

Table 9 shows comparable and additional data for 18 June 2020, for 54 energy suppliers covering 56 domains (two domains each were active for SSE and Scottish Power). The suppliers are categorised in the previous four sizes plus a fifth Very Small size.⁴³ What are the main findings?

Large suppliers have lower median TrustScore than Medium and Small suppliers, but the difference is not as great as it was in the previous year. Very Small suppliers have a slightly higher TrustScore. The median number of reviews to date of Medium suppliers is now only about three times as high as for Large suppliers (as opposed to six times), but is still about six times as many as for Small suppliers. So Large suppliers are catching up by actively inviting reviews.

Not surprisingly, smaller suppliers tend to claim their Trustpilot domains later than larger ones that entered the market earlier. The June 2017 median date of claiming for the Large suppliers actually reflects four domains claimed very early (in 2014-15) and four only recently (in 2019-20).

thousand customers. Many of the later reviews were critical of the company's inadequate service and lack of contactability, and later of the process whereby customers were transferred to another supplier.

⁴³ Sizes estimated from various sources including Ofgem data portal and complaints data, Cornwall Insight Supplier Insight Service Reports, online information and industry contacts. Sizes are given before the incorporation of Co-operative Energy and Engie into Octopus Energy and SSE into Ovo. The sizes of Very Small suppliers are rather speculative.

Table 9 TrustScores, size of energy supplier and other data, 18 June 2020

Size of energy supplier	Large	Medium	Small Plus	Small Minus	Very Small
# Customer a/cs	over 3m	300k-3m	150k-300k	11k-100k	1k-10k
# Suppliers	8	13	12	14	9
Median TrustScore	3.7	4.2	4.2	4.2	4.5
Median # Reviews to date	6,601	21,855	3,544	1,308	106
Median Date Claimed	Jun-17	Oct-15	Jul-17	Dec-17	Feb-19
% Subscribing	75%	92%	100%	71%	44%
% Asking for reviews	63%	92%	92%	71%	33%
Median % response rate	34%	14%	93%	79%	78%
Median # Flagged last 12 mos	12	17	8	3	1
Median # Reviews last 12 mos	4016	4637	1487	583	103
Flag rate per 1k reviews	3.0	4.9	11.8	3.9	9.3
Median # Customers/supplier (k)	5163	627	161	51	5
Median 12mos Reviews/1k customers	0.9	6.5	7.9	10.0	34.3

All but one of the Medium suppliers, and all of the Small Plus suppliers, subscribe to Trustpilot services. Although it is not apparent from Table 9, all but one of the Large suppliers now subscribes too.⁴⁴ The rate of subscription is lower for Small Minus and especially Very Small suppliers. There are similar findings with respect to the proportion of suppliers actively inviting reviews, which is highest for the Medium and Small Plus suppliers. In contrast, the median Large supplier response rate is about one third of reviews, the median Medium supplier rate is less than one sixth, whereas the median Small Plus supplier response rate is over 90%, and the median Small Minus and Very Small supplier response rates are about three quarters.

Flagging inappropriate reviews is not frequent: the median is about one per month (12 per year) for Large suppliers, half as many again for Medium suppliers and down to one per year for Very Small suppliers. As a proportion of reviews received, Small Plus suppliers are the most active in flagging inappropriate reviews: their median rate is about 12 per thousand reviews, compared to only about 3 per thousand reviews for Large suppliers.

Finally, over the last 12 months, the median number of reviews per thousand customers is inversely related to size of supplier. The median Large supplier received one review per thousand customers, which gradually increased for smaller suppliers, and the median Very Small supplier received 34 reviews per thousand customers. (The sizes of the Very Small suppliers are rather conjectural, but even if they were twice the assumed sizes, the median review rate per customer would be higher than for larger suppliers.)

What is one to make of this? Perhaps, taken with earlier findings, the implications are that Trustpilot is becoming an increasingly significant part of the competitive landscape in the domestic energy supply sector; that the now-Medium suppliers have hitherto made most use of

⁴⁴ Scottish Power subscribes via both domains, SSE subscribes via one domain but not the other, and nPower does not subscribe.

Trustpilot and Large suppliers least use; that most Large suppliers are now taking steps to catch up; that significant proportions of Small and Very Small suppliers also make active use of Trustpilot with the extent generally increasing with size of supplier; but that nonetheless the Very Small suppliers attract the largest number of reviews per thousand customers, and as a group obtain the highest median TrustScore in the sector.

5.3 Trustpilot scores for suppliers exiting the market

The question has been raised: can anything be said about the use of Trustpilot by those energy suppliers that have gone bankrupt and defaulted in the last two years? Table 10 shows the 14 suppliers that have exited the market via the Supplier of Last Resort method, their date of exit and number of customers, and their TrustScores in the month they exited.⁴⁵

The TrustScores here cover broadly the full range; they are perhaps distinctive only in that they follow a sort of “Normal” distribution, which is not the case for other sets of energy suppliers, where the distribution of scores can vary considerably.⁴⁶

Table 10 Trustpilot scores and reviews for suppliers exiting the market

Supplier	Date of SOLR	TrustScore	Number of reviews	Number of customers	Reviews per thousand customers
Future Energy	Feb-18	2.1	21	10,000	2
Iresa	Jul-18	1.5	1308	100,000	13
Usio	Oct-18	3.6	121	7,000	17
Extra Energy	Nov-18	4.0	6098	108,000	56
Spark	Nov-18	3.8	18712	290,000	65
Oneselect	Dec-18	3.4	1023	36,000	28
Economy Energy	Jan-19	2.8	10635	235,000	45
Ourpower	Jan-19	2.3	167	31,000	5
Brilliant Energy	Mar-19	3.8	134	17,000	8
Solarplicity	Aug-19	2.5	7532	7,500	1004
Eversmart	Sep-19	3.5	1567	39,000	40
Toto Energy	Oct-19	3.5	15042	134,000	112
Breeze Energy	Dec-19	3.8	76	18,000	4
Gnergy	Mar-20	4.7	321	9,000	36

⁴⁵ Details of companies from Cornwall Insight. TrustScores and number of reviews from MWT but readjusting pre-September 2019 scores out of 10 to present basis out of 5. For the five suppliers that exited before December the Trustpilot details are for December 2018. The list excludes Cardiff Energy which had only 2 reviews.

⁴⁶ For these 14 suppliers that defaulted, the distribution of Star labels was 7% Bad, 21% Poor, 36% Average, 29% Great and 7% Excellent. For the 26 suppliers examined in Table 4 above, the corresponding distribution was 19%, 8%, 23%, 31% and 19%. But for the 65 energy supply domains observed on 18 June 2020 (see Table A4.3) the distribution was 6%, 5%, 18%, 29%, 42%.

The numbers of reviews, too, do not seem distinctive. It might be thought that those companies with fewer than 10 reviews per thousand customers did not invite reviews, but closer inspection of the Trustpilot sites reveals that some did – it was perhaps lack of time rather than want of trying.⁴⁷ Toto Energy with over 1 in ten customers giving reviews certainly invited reviews, as did Solarplicity, albeit not to the extent of getting more reviews than customers.⁴⁸ Evidently these high review rates were not sufficient to offset the poor service provided towards the end, and may indeed have exacerbated the low TrustScores. Some companies like Iresa, Ourpower and Eversmart seem to have exhibited a fall in service and in ratings before default, but others did not. Extra Energy, for example, received about 40 Bad reviews in the year or so after it defaulted, but was getting a broad mix of stars including many Excellent reviews just before that.

Part Six: Use of Trustpilot by various individual energy suppliers

6.1 Variation in growth of number of Trustpilot reviews

Not only does the number of Trustpilot reviews per company vary considerably, so does the growth rate in number of reviews over time. This section looks in more detail at this for energy suppliers, which are the main focus of this paper, and takes advantage of a somewhat longer set of data that have been collected for energy suppliers. This subsection looks briefly at the big picture. Subsequent subsections examine the policies of several particular energy suppliers, to understand why they have (or in one case has not) adopted a policy of inviting reviews.

Over the two months from 5 February to 8 April 2019, the median growth rate in number of reviews among the 26 energy suppliers discussed earlier was 22.5% for Medium suppliers, compared to 10% for Large suppliers, 16% for Small Plus suppliers and 6% for the two Small Minus suppliers. A handful of suppliers were notable for review growth rates of 30% or more in these two months, viz Bulb 30%, Together Energy 35%, Green Network Energy 36%, Octopus Energy 40%, EDF 40% and Co-op Energy 42%. Most remarkable of all was the growth rate of 639% at Engie.

A larger group of 47 energy suppliers was tracked over the two year period 6 May 2018 to 8 May 2020. This group excludes just over a dozen suppliers that had gone out of business during this period and four new suppliers that had no reviews recorded in May 2018, but includes some suppliers that had been taken over in the last few months but still retained their separate identity, at least in the minds of reviewers. Over that two year period, the median increase was nearly seven-fold (6.8). The range was considerable: lowest increase 60% (1.6), first decile doubled (2.1), first quartile trebled (3.0), third quartile nearly twenty-fold increase (19.2), ninth decile well over a hundred-fold increase (130.3) and highest increase was over a thousand-fold (admittedly by the company ESB Energy which happened to have just one review on 6 May 2018).

⁴⁷ One reviewer of Ourpower says in January 2019, “I have only been a customer with this energy supplier for about a week, so it is too early for me to give this company an adequate review about my experiences with them”. The next reviewer says, “Stop sending me emails to review you before the switch has even happened”.

⁴⁸ The ratio for Solarplicity is based on the number of customers at the very end, but some months earlier it had between 50,000 and 150,000 customers, hence between 50 and 150 reviews per thousand customers.

6.2 Use of Trustpilot by Octopus Energy

Octopus Energy is one of the fastest-growing new suppliers. It entered the market in 2016, immediately claimed its Trustpilot site (before any reviews were received), and subscribed to Trustpilot services. It grew very quickly: by Q3 2018 Ofgem was categorising it as a Medium-sized supplier, defined as having a market share over 1% (over 0.5m customer accounts), and by Q2 2020 it had about 2.7m customer accounts. In early April 2019 Octopus Energy had the fifth highest number of Trustpilot reviews (8959) and was third equal in growth in number of reviews (40%) over February to April 2019. In April 2019 it had the joint-highest TrustScore in the sector (9.6 with Bulb Energy). It is keen to get customer engagement and feedback, including via Trustpilot reviews.

“We don't use Collect Trustpilot Reviews but we do include links to Trustpilot in many of our communications so customers know that's where to give reviews. Because we have very high levels of engagement on emails (driven by transparency, respect for inboxes, and things like Wheel of Fortune) many customers are aware of Trustpilot and give reviews there.”⁴⁹

It has explained further the role and importance of Trustpilot in providing customer feedback.

“Trustpilot is vital for us. The fact that customers are able to rate any aspect of their experience (the process of signing up, the handling of a service interaction, pricing, communications) in a way which is unfiltered is hugely helpful for us as managers to know what people say about us, and to find and address issues. It's much more meaningful than other ratings for the following reasons:

1. Assessments like Citizens Advice are based on metrics which may only be a proxy for customer satisfaction - and indeed may be a poor proxy. For example, waiting time is a terrible metric - it's easy to answer a call quickly - and then put the customer on hold for ages, or have them speak to an unhelpful brick wall. Being signed up to the Energy Switching Guarantee (or not) is meaningless to customers, and BS18477 may be an excellent standard but it is possible to provide great service to vulnerable customers without it.
2. Many surveys rely on consumers remembering which energy company they are with. [But] even in a high-touch category like shampoo (customers buy it every couple of weeks, and many care enormously about the brand) they'd often misremember what brand they used.
3. Most important: Customers give verbatims - so you know exactly what you are getting right or wrong and can address it. That's the reason we do well - every negative review is reviewed by management and we accordingly make changes to what our company does for customers, so many changes in our bills, statements, price communications, online account, staff training, internal processes, etc.

⁴⁹ To explain, “The Wheel of Fortune is a fantastic Octopus innovation in customer engagement. For 20 years energy companies have treated meter readings as a cost reduction exercise. We saw it as the opportunity to drive a positive monthly engagement.” Octopus Energy, personal communication, 2 April 2019. The Octopus twitter link describes the Wheel of Fortune as follows. “Introducing...WHEEL! 🎰 OF! 🔥 FORTUNE! 🗣️ Submit a meter reading and spin the wheel for a chance to win juicy credit prizes! 🎁 Will it be £5? £50? Even £500???” 🎉🎉 Congrats [Name], our first lucky winner. He submitted his first readings and bagged himself a fiver!”

4. It's public and continuous - so rather than a one-off big bang, we get ongoing feedback, and can react quickly. Because it's public, it really motivates our team.” (Octopus Energy, personal communication, 2 April 2019)

6.3 Use of Trustpilot by Octopus Energy for M&S Energy

Now consider the experiences and policies of two new White Label energy suppliers, who have taken different approaches from their previous suppliers (and contrast with the approaches of the two parent organizations).

Marks and Spencer Energy (M&S Energy) is a White Label product, initially supplied by SSE. From January 2017 to 6 July 2018 it had only seven reviews: two customers gave it 2 out of 5 stars (Poor), five gave it 1 star (Bad). Its Trustpilot site was unclaimed. One would have thought it an embarrassment to the parent company, except that (as indicated above) the Trustpilot site of Marks and Spencer itself was (and still is) unclaimed and its TrustScore was Bad.

On 29 September 2018 Marks and Spencer transferred the White Label account to Octopus Energy. M&S Energy immediately claimed – took responsibility for - its Trustpilot account. A month later, Octopus wrote on Trustpilot to those seven customer reviewers that had previously been upset. M&S Energy subscribed to Trustpilot and invited reviews. And Octopus Energy evidently transformed the customer relationship – or at least encouraged satisfied customers to record their views. As of 20 March 2019 – six months later - M&S Energy had 108 new reviews: 5 customers scored it 4 stars (Great), the other 103 scored it the maximum of 5 stars (Excellent). M&S Energy had risen to a TrustScore of 9.6 (out of 10), equal to the then-highest TrustScore (achieved by Octopus Energy itself and Bulb).

A year later, on 18 June 2020, M&S Energy had 1232 reviews, of which 1044 were received in the previous 12 months, and it responded to 1% of these, those few where there was a tangible concern. Its TrustScore was 4.9 out of 5, highest among 64 domestic suppliers (Table A4.3).

6.4 Use of Trustpilot by Powershop for Sainsbury's Energy

The other White Label product is Sainsbury's Energy, initially supplied by British Gas. In early 2019 it had 50 reviews on Trustpilot dating from August 2017 to February 2019, averaging less than one per week. Over three quarters of them gave the minimum one out of five stars (Bad). Sainsbury's Energy TrustScore was very low at 1.4 out of 10.⁵⁰ The Trustpilot site was unclaimed. On 5 February 2019 Sainsbury's decided to exit the energy market and transferred its customers to British Gas.

On 23 April 2019 Sainsbury's changed its mind, and announced that it was relaunching its energy tariff, this time in conjunction with nPower. Since nPower had one of the lowest TrustScores in the sector (0.5 out of 10), and was (and still is) a non-subscriber to Trustpilot, a significant improvement in the TrustScore of Sainsbury's Energy might have seemed unlikely.

⁵⁰ Surprisingly, this was below the TrustScore of British Gas itself, which was around 2.5 out of 10, although British Gas would no doubt argue that the quality of service provided was no lower. Perhaps Sainsbury's Energy customers had higher customer service expectations? As explained below, a few months later British Gas itself began to use Trustpilot more actively by inviting reviews.

However, nPower was to provide supply to Sainsbury's via a subsidiary company associated with Powershop, a new small supplier with a novel approach.⁵¹ It was therefore uncertain how Sainsbury's Energy TrustScore would develop.

Sainsbury's Energy immediately claimed its Trustpilot account in May 2019 and subscribed to Trustpilot. However, it did not immediately invite reviews, partly because there were still a number of issues to deal with related to the previous regime, and partly because staff were not yet trained to implement the measures that would be needed. Over the next nine months Sainsbury's Energy received only six reviews, a fraction of the previous rate, which itself was low. All six of these reviews were still one star Bad, and by January 2020 Sainsbury's Energy TrustScore was only 1.4 (now out of 5).

Sainsbury's Energy was now ready to begin inviting reviews. In the first trial (3 – 28 February 2020), customer service staff concluded inbound telephone calls by inviting the customer to review the company on Trustpilot. The response rate was under 1%. A dozen reviews were filed in the last two weeks of February 2020, an average of one per day. But three reviews were four star, the other nine were five star. The TrustScore shot up from 1.4 to 3.1. "This initial experience brought home the importance of a great customer handling team that could turn an angry complaining customer into an appreciative one, and a potential one star review into a five star one." (Powershop)

The second part of the trial (11 May – 30 June 2020) included Powershop as well as Sainsbury's Energy customers. The response rate improved but was still under 1%. Nonetheless this led to a further 50 or so reviews, again mostly yielding five stars. The TrustScore rose to 4.1 by 18 June.

The third part of the trial (4 – 11 August 2020) involved email invitations to customers who had opted to receive marketing communications and who had been with Powershop or Sainsbury's Energy for up to 3 months.⁵² "The primary aim was to build a better TrustScore to ensure that new customers felt confident switching to us. A secondary aim was picking up feedback and nuances that may have been lost from our other feedback mechanisms. An example of the latter was a concern about smart meter incompatibility, which we investigated and were able to address via communications with customers, additional wording on the website and in FAQs." The response rate was markedly higher, at around 3.5%, yielding another three dozen reviews in the second week in August 2020, again mostly five star, bringing the TrustScore up to 4.4 on 13 August 2020. The company also began to reply to reviews as part of its aim to demonstrate concern for customers. For the future, the aim is to invite reviews at a given time interval (from

⁵¹ Powershop and Sainsbury's Energy accounts are managed under licence by PSE energy UK Ltd, which is 100% owned by npower and uses software called Flux that is 100% owned by the New Zealand company Meridian Energy. As of 31 May 2019 Powershop had a TrustScore of 6.3/10 based on 239 reviews. But Powershop was something of a 'Marmite' supplier, insofar as it offered "a new way of buying energy" (via discounted powerpacks) which customers seemed to love or hate. Trustpilot rankings showed that 53% of customers rated Powershop Excellent and 32% rated it Bad, leaving only 15% of customers in-between. Along with EDF at 14%, this was a lower proportion "in-between" than for any other supplier with a TrustScore between 2.0 and 8.0.

⁵² Ideally, Powershop would have used an automated email platform from the start, so that it could take advantage of Trustpilot tools that integrate with such systems and also consider the best time to issue invitations to review. But Powershop did not then have a GDPR compliant email platform in place, being in the process of procuring one at the time.

customers who have opted to receive marketing communications) using the automated Trustpilot invitation mechanism.

These high TrustScores of the two White Labels stand in stark contrast to those of the parent companies, which do not engage with customers in this way. Marks & Spencer, which has never claimed its Trustpilot domain, improved slightly from 2.7 out of 10 (Bad) in 2019 to 2.3 out of 5 (Poor) in 2020. Sainsbury's, which claimed its domain in February 2017, has not been active on it and remains classed as Bad (initially 2.0 out of 10 now 1.7 out of 5).

6.5 Use of Trustpilot by Engie

In early 2019 Engie exhibited a dramatic increase in Trustpilot reviews (639% growth in two months) and in its TrustScore. The background is that during 2017 and 2018 its Trustpilot reviews were very mixed. In contrast, on 27 June 2018 Engie was ranked second equal by Citizens Advice in its home energy customer service league table, based on performance and interviews during first quarter 2018. The company was also getting strong performance reviews through its own customer surveys. Engie decided that more active engagement with Trustpilot was important in order to ensure that its TrustScore better reflected these other metrics. Accordingly, the company started actively collecting reviews from its customers (via the paid service with Trustpilot). The aim was to more directly gear the company's customer service plan to the Citizens Advice requirements, but also to make sure that this good work was not undermined by a TrustScore that was not a fair reflection of the quality of service it actually provided.

Comments on Engie's Trustpilot site suggest that the customer service team responded actively. There was also systematic encouragement to a random sample of new customers, and to customers interacting with the supplier's contact centre, to report their views. As noted, the number of Trustpilot reviews increased over six-fold in two months, from 87 to 556. By 8 April 2019 79% of the reviews were Excellent, and the TrustScore increased from 6.9 out of 10 on 6 February 2019 to 9.2 on 8 April. The company regarded this as a more accurate reflection of the quality of service being delivered through its contact centre, plus new customers being happy with the switch to ENGIE.

6.6 Use of Trustpilot by the six Large suppliers

The above cases suggest that a significant turnaround can be achieved by new suppliers with relatively small numbers of customers. But is it realistic for a long-established Large supplier with many customers and a low existing TrustScore based on a significant number of Bad reviews, and no doubt an established way of doing things, to contemplate raising its game with respect to customer service and use of Trustpilot? As of mid-2019, the answer would have been Don't Know. But a year later, the answer is a clear Yes. And need it take a long time? The answer is No: a Large supplier can raise its a star grading by one or two levels within a matter of months, and one such supplier even went from Bad to Excellent in one year.

Figure 1 Large supplier TrustScores over time

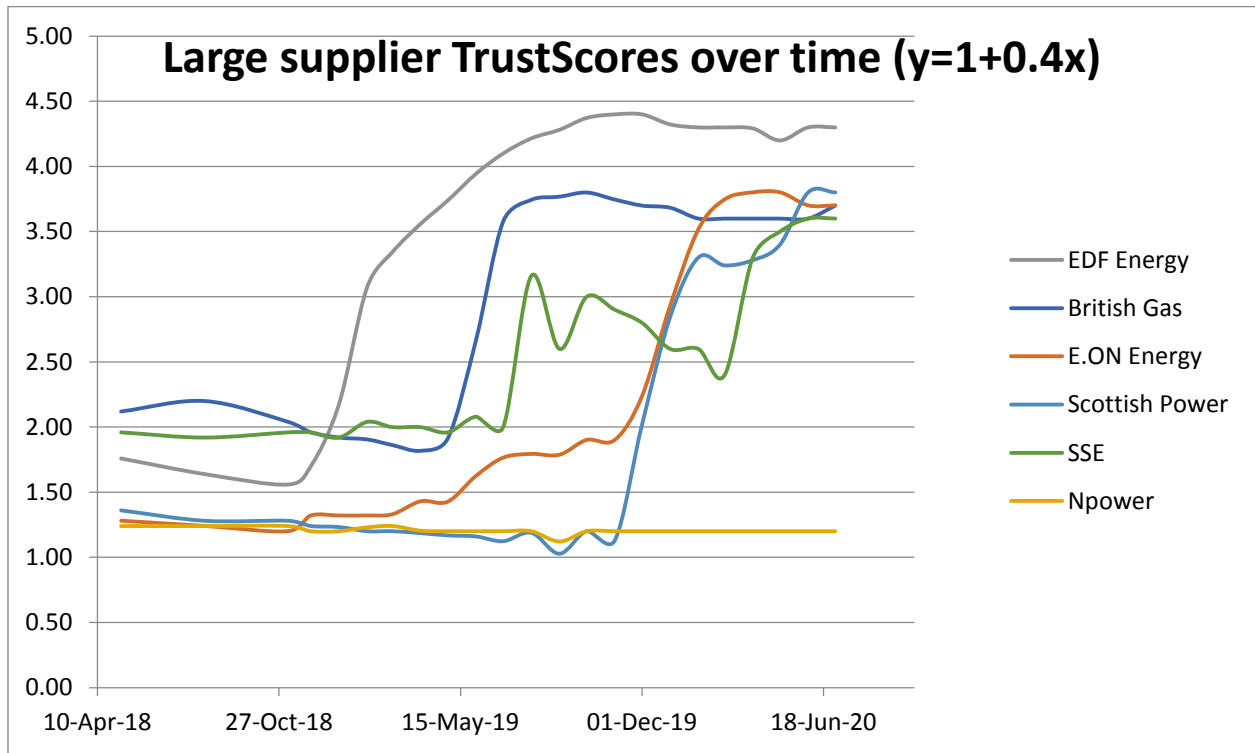


Figure 2 Large supplier number of Trustpilot reviews over time

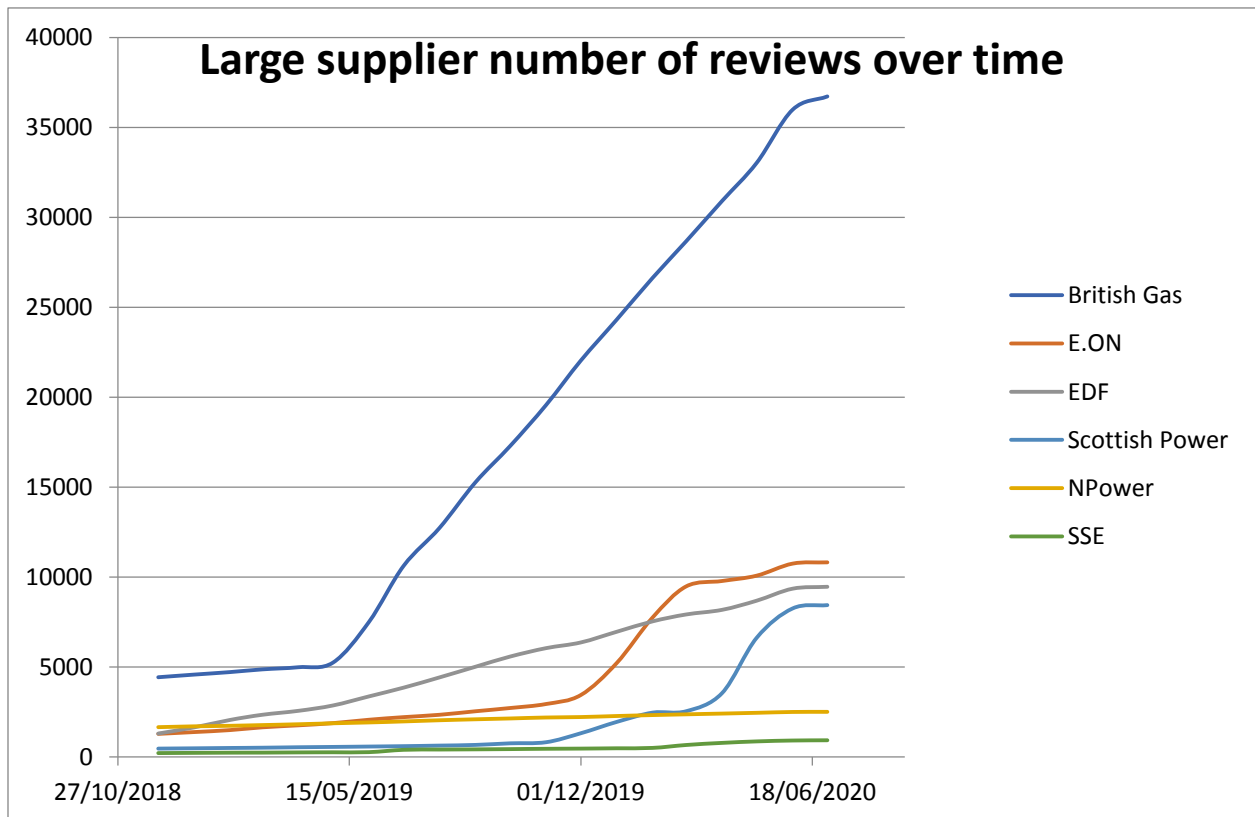


Figure 1 shows the TrustScores of the six Large suppliers over about two years from 6 May 2018 to 1 July 2020.⁵³ Figure 2 shows the number of reviews they received over the same period.

Throughout most of 2018, none of these suppliers invited reviews, and the reviews they received were almost entirely critical, with TrustScores in the range 1.2 to 2.2, ranking British Gas and SSE as Poor, the other four suppliers as downright Bad. This does not necessarily mean that their service was less satisfactory than that of other companies: as they and others have pointed out, they tend to have a higher proportion of more vulnerable customers that are more likely to report problems. It was only gradually that it seemed to them worth doing something about the Trustpilot situation.⁵⁴ By July 2020, EDF's TrustScore stood at 4.3 (Excellent), four other Large suppliers were in the range 3.6 to 3.8 (borderline Average to Great), and Npower was still at 1.2 (Bad).

EDF took action first. During the second half of 2018, its (adjusted) TrustScore was declining from around 1.7 to 1.6: Bad and getting worse. The company decided to take a more active role in inviting reviews. Inspection of its Trustpilot site suggests that the first four invited reviews (though not then labeled as such) arrived in October 2018, though they did not increase in number until the end of the year. The total number of reviews went from 1202 on 6 November 2018 to 1790 on 6 February 2019, an increase of about 50% in three months. EDF's (adjusted) TrustScore increased to 3: better than Bad but then still Poor. Two months later the number of reviews had increased by a further 40%, one of the highest increases over that period, and the TrustScore rose to 3.5. (Interestingly, at that time the nearly 2400 Trustpilot reviews of EDF were largely divided between Bad (39%) and Excellent (45%) and since the later reviews were mostly Excellent, the past reviews must have been mainly Bad.) All reviews now got a personal response from EDF, which was not always the case previously. By 22 July 2019 the TrustScore was up to 4.1, which was Good (now Great) and a year later, as of 18 June 2020, EDF's TrustScore was 4.3, just into the Excellent category, based on 9122 reviews, and the company had responded to 99% of its reviews over the previous 12 months. More active invitation and collection of reviews had thus paid off. This was presumably backed up by better customer management in order to get the desired improvement in ratings.

British Gas's (adjusted) TrustScore had declined from 2.2 in August 2018 to 1.8 in early 2019. Like EDF, it then subscribed to Trustpilot's services and put substantial effort into collecting reviews. The first invited review arrived on 13 June 2019. The number of reviews increased from about 7500 at the beginning of June to over 10,600 at the beginning of July, an increase of over 40% in one month, and the TrustScore went up to 3.6. The number of reviews has continued to

⁵³ As noted above, the TrustScores for the period before 1 September 2019 (range from 0 to 10) have been adjusted to the subsequent range (from 1 to 5) by the formula $y = 1 + 0.4x$. The Scores and numbers of reviews for Scottish Power and SSE are for their (preferred) .co.uk domains, which differ from their .com domains.

⁵⁴ "I don't think large companies were reluctant to use Trustpilot, it just wasn't a priority. It takes some effort to engage with it effectively and it is only one of a number of ways in which customer service is measured. But clearly it was felt by most large companies that it was increasingly being used as a reference by customers and the poor comparison with some of the medium and newer suppliers was not felt to be an accurate reflection of the levels of service being provided. So the large suppliers started to approach Trustpilot in the same way as the smaller suppliers to 'even the score'." (Contact at Large supplier, email 15 July 2020)

increase at the same remarkable rate (about a seven-fold increase in a year) but BG's TrustScore has held at about the same level (3.6 to 3.8), on the borderline between Average and Great.

E.ON was an early mover in inviting reviews: its number of reviews increased by two thirds over the latter part of 2018, a greater proportionate increase than for any other Large supplier. But this had little impact in 2018: its (adjusted) TrustScore stayed down at around 1.3: Bad. During the first five months of 2019 E.ON increased the number of its reviews faster than any Large supplier except EDF, and this was reflected in its TrustScore gradually rising to 1.8 (Poor) by August 2019, and to 2.2 (but still Poor) by the end of the year. Then a rapid burst of invitations (a 50% increase in the number of reviews in each of the first two months of 2020) saw its TrustScore shoot up to 2.9 (Average) in January and 3.8 (Great) by March. The TrustScore has since remained at around 3.7-3.8, Average-Great borderline, with only a modest increase in number of reviews.

SSE was the fourth Large supplier to make active use of Trustpilot. It has always had the fewest reviews of the Large suppliers, and from early 2018 to early 2019 its (adjusted) TrustScore of around 2 was Poor but nonetheless the second highest of the Large suppliers. It had 10% Excellent reviews, but 81% Bad. It did not respond to customer reviews, nor challenge any of the (often critical) reviews. Not that there were many reviews: an average of 9 per month during the first half of 2019. However, by spring 2019 the TrustScores of both EDF and British Gas had soared far above SSE, and E.ON was heading upwards too. SSE decided to subscribe to Trustpilot and to invite reviews. The first invited review was posted on 22 July 2019. In the next ten days nearly 150 more arrived, most (but not all) awarding 5 stars. SSE's TrustScore rose from 2 (Poor) on 1 July 2019 to 3.2 (Average) a month later. After that invitations seem to have ceased, the number of reviews fell back to about 15 per month, and the TrustScore gradually declined to 2.4 (Poor) by March 2020. There was then another set of manual invitations since 370 reviews were posted in the next three months and the TrustScore rose to 3.6 (at the high end of Average) by mid-2020. (And with another 850 or so manually invited reviews in July to September, the TrustScore had risen to 4.0 by 16 September 2020.)

Fifth and last to move was Scottish Power. By the end of 2018 its (adjusted) TrustScore was down to 1.2. (Its unadjusted TrustScore at 0.3 out of 10 was the lowest of all large suppliers – indeed possibly of all suppliers.) As of mid-2019 it had only 2% Excellent reviews and 95% Bad reviews. It did not respond to reviews and challenged none of its 314 reviews. Then in April 2019 it decided to subscribe to Trustpilot services and invite reviews. But it took time to make arrangements and train staff. The number of reviews gradually increased as the year progressed: averaging about 17 reviews per month from early 2018 to early 2019, then about 30 per month in mid-2019, up to 500 in November, over 600 in December 2019, 1000 in March 2020, over 1600 in May and a peak of over 3000 in April 2020. Scottish Power's TrustScore responded: from 1.1 (Bad) in November 2019 to 2.0 (Poor) in December, 2.85 (Average) in January 2020, 3.3 in February and most recently to 3.8 (Great) by June 2020.

Sixth large supplier NPower has taken little interest in Trustpilot. As of July 2020 it has 3% Excellent reviews, 4% Great, Average or Poor, and 94% Bad. It does increasingly respond to reviews, in fact to no less than 37% in the year to July 2020. But it does not subscribe to

Trustpilot and has not challenged any of the 582 reviews in the last year. Its TrustScore has remained at 1.2 out of 5 (Bad) ever since the change in scoring. Npower's policy is thus analogous to that of some long-established supermarkets, banks and mobile phone providers discussed above. This does not necessarily imply that the market is not competitive, or that these companies have market power and do not need to appeal to customers. Rather, these companies, now fewer in number, do not believe that inviting Trustpilot reviews is a vehicle for competing effectively.

6.7 Competition and social media

Company policies presumably reflect conscious commercial decisions. Inviting and responding to customer reviews is costly and may or may not be cost-effective.⁵⁵ And it requires continual monitoring over time.⁵⁶ If achieving a high TrustScore is primarily a way of attracting new customers rather than retaining existing ones, then aiming at high scores may be a more economic strategy for new entrants that wish to grow, or for incumbents wishing to replace customers that have left. It may be a less economic strategy for some larger more established companies who may be resigned to losing market share (and who may also take the view that dissatisfied customers are likely to be more expensive to serve and hence not worth the cost of trying to keep).

However, as explained above, inviting customers to review a company is not just a means to get a higher TrustScore. Analysing Trustpilot complaints is a means of better identifying and addressing customer concerns.⁵⁷ And of motivating staff.⁵⁸ Inviting and responding to reviews demonstrates sensitivity to customers.⁵⁹

These types of social media channels are increasingly important as a channel of communication. Most of the retail energy suppliers have now developed apps to facilitate customers' access to their accounts. They can use these apps to access account information, manage payment of bills, submit meter readings, switch tariffs, etc, without needing to open a computer and log in. PPM

⁵⁵ "The reasons for not responding are a mixture of there being little merit and some risk in responding, and an expedient use of resource. We cannot reply on individual specifics for anonymity reason and a key reason for not doing generic responses is that if they are more than platitudes then it needs a team of skilled people to do so – better to have these people serving customers." (Contact at a supplier, email 28 March 2019)

⁵⁶ Keeping the Trustpilot rating at a high level requires "engaging with Trustpilot properly, replying promptly and in a consistent, personalised and relevant way to reviews, and also *inviting* reviews consistently. In the same way as analysing complaints is important to improving customer service, the same is true of Trustpilot, carrying out analysis of trends and root causes based on Trustpilot data. It is noticeable that, if you take your eye off the ball in terms of responses, your scores will fall." (Contact at a Large supplier, email to author, 17 July 2020)

⁵⁷ "It is very common for CEOs to be very close to complaints, including individual ones, as they can cut through their own organisations to understand what is going on. Unfortunately complaints are actually also a way of finding systemic errors in billing systems." (Contact at a Large supplier, email to author, 9 July 2020) "We are of course looking into new areas of improvements, and that's why our teams are looking into analysing repeated patterns that could solve some of our customers' pain points." (Contact at a Large supplier, email to author, 24 July 2019)

⁵⁸ "We are also using it as a way to inspire and provide feedback for our employees, we share the trustpilot reviews internally and while we were still in the office we even had scrolling screens showing the latest reviews, good and bad." (Contact at a Large supplier, email to author, 15 July 2020)

⁵⁹ "An active email invitation campaign [was] key to improve our former ratings and demonstrate publicly our commitment and passion for the work our teams do." (Contact at a Large supplier, email to author, n.d.)

customers with a smart meter can top up their meter from their phone, no need to go to the newsagents with a key anymore. These apps are themselves rated by customers on google and applestore (quite separately from Trustpilot). Appendix Table A7 (which is not claimed to be complete) shows around 70 such ratings, with numbers of reviews per app ranging from 3 to over 100,000. The scoring process seems similar to how TrustScores are calculated, with age of review taken into account (again without explaining precisely how).

Competition is sometimes characterised as a rivalrous discovery process taking place over time. The present analysis of both energy suppliers and other companies indicates that different companies have recognised the significance and potential of Trustpilot at different times, and many have copied others.⁶⁰ Why was EDF the first of the six Large suppliers to use it actively, and Npower the last? Perhaps because EDF has been the most keen and able to maintain market share, and Npower the least keen and able.⁶¹ Indeed, Npower is now leaving the market.⁶² Attracting customers necessitates good service, and a perception of good service, as well as a low price. At any rate, achieving a satisfactory TrustScore, and analysing customer reviews, are increasingly seen as critical for most companies, established as well as new.

6.8 Alternative calculations based on TrustScores

There are understandable concerns that companies can influence the TrustScores by inviting or encouraging customers to give reviews at times when they might be inclined to give favourable (often Excellent) reviews - for example, just after they have joined the company. (A five star Excellent score has been observed for a review saying only “OK so far”.) This prompts the question: Is it possible to use TrustScore data to make alternative rankings of companies that are more reflective of “true” customer views, or at least less vulnerable to timing of invitations?

Appendix Three explores two calculations for a set of 26 energy suppliers in June 2019, when invited reviews were less common than in mid-2020. The results, in brief, are as follows.

First, suppose that five star Excellent reviews are regarded as “devalued” as a result of invited reviews that generally yield five star reviews. Consider a benchmark ranking based on one to four star reviews only. Compared to that hypothetical benchmark, the actual TrustScore ‘pulled up’ five suppliers by a median 4 places, and ‘pulled down’ five other suppliers by a median 3 places. Five of the six Large energy suppliers were at the bottom of both rankings, neither pulled up nor down.

⁶⁰ “If a senior person starts tracking a measure it starts getting managed. I suspect that a senior person started being interested in Trustpilot at EDF before the other large suppliers. So EDF started to engage with it, and once it did senior people in the other large suppliers noticed and started asking questions.” (Contact at a Large supplier, email to author, 16 July 2020). “If I were to speculate, I would guess that we didn’t use it at first because we didn’t realise how much it was used and how useful a channel/process it is for getting feedback at relatively low cost. In short, I would guess that the mindset went from ‘why should we do it’ to ‘why wouldn’t we’.” (Contact at a Large supplier, email to author, 17 July 2020)

⁶¹ Ofgem segmental accounts show that EDF customer account numbers fell by only 4% from 2009 to 2019, and Npower numbers fell by 44%, with the other four large suppliers ranging between 10% and 35%.

⁶² Npower and SSE had planned to merge but this was called off in December 2018. In May 2020 it was announced that E.ON would take over Npower’s domestic and small business retail supply customers.

Second, to take a more extreme view, suppose (which not all would accept) that the most serious problems are reflected in the number of the lowest one star reviews. A more hypothetical calculation was made of how companies were ranked on one star reviews, also seeking to allow for size of company. Compared to the hypothetical one star benchmark, the actual TrustScore ‘pulled down’ the six Large energy suppliers quite severely, by a median 17 places, and ‘pulled up’ five Medium suppliers and two smaller suppliers by a median 10 places. In other words, although the Large suppliers seem to have a lot of one star reviews compared to some Medium suppliers, as a proportion of the number of customers they are not doing so badly after all, but the TrustScores do not reflect that.

Is any single measure capable of reflecting “the” view of customers? There is no doubt that inviting reviews affects the proportions of reviews at different star levels and thereby affects the relative ranking of companies in any sector. However, neither of the alternative rankings explored is self-evidently the “right” criterion or better than the present TrustScore. Indeed, the ability to attract good reviews by invitation is arguably a merit in itself. It is open to all suppliers to invite reviews. If TrustScores tend to favour those suppliers that make an effort to communicate with customers and are successful in doing so, is that really so bad?

Part Seven Energy advice-giving organisations and Trustpilot

7.1 Trustpilot reviews of energy consultants and switching sites

Table 11 shows 33 energy advisory organisations with more than 30 reviews each in June 2019. In the first group (a) – those advising residential customers - are six Price Comparison Websites accredited by Ofgem,⁶³ plus four automatic energy switching services⁶⁴ (other accredited PCWs and other autoswitching services either did not have Trustpilot pages or had few reviews), plus one company (Split The Bills) that provides a bill management service. The second group (b) comprises 22 companies believed to be energy consultancies advising business customers.

Table 11 is notable insofar as all these organisations had (unadjusted) TrustScores of 7.0 out of 10 (Good) or better. Nearly two-thirds of these organisations scored 9 or more (Excellent). This compares to 20% of energy suppliers, 15% of mobile phone providers, 10% of banks, and none of the supermarkets. Possibly a distinguishing feature of Table 11 is that this is a new market, and none of the companies is an incumbent from an earlier era. They are probably all relatively newly established, and they and their customers very familiar with online communication.

Nonetheless, the pattern of Trustpilot usage and attitude to reviews is remarkably mixed. All of them have claimed their Trustpilot sites but whereas nearly three-quarters of these advisory organisations collect reviews, over a quarter do not. Just over half subscribe to Trustpilot, nearly half do not. One third of them routinely respond to reviews, over one third do not, and a quarter of them respond only to some reviews. Only 8 of these organisations have more than 1000 reviews. Two of the organisations acknowledge providing incentives to give reviews, indicated

⁶³ Uswitch, Energylinx, Energyhelpline, SimplySwitch, Quotezone, Moneysupermarket.

⁶⁴ Migrate, Flipper, Lookaftermybills, Switchd.

by an (I), but (at 714 and 79 reviews) they do not have the largest numbers of reviews, nor (at 9.5 and 8.6) anything like the best scores in this category. There are no obvious determinants of the levels of TrustScores in Table 11, and regression analysis using dummy variables does not reveal any.

Table 11 Trustpilot reviews of other energy advisory organisations, 1 June 2019

Organisation	TrustScore	Number of reviews	Use of Trustpilot	Subscribes?	Responds to reviews?
(a) Advising residential customers					
Uswitch	9.4 Excellent	3520	Collects	Yes	Yes
Energylinx	9.2 Excellent	260	Collects	Yes	Yes
Migrate	9.2 Excellent	119	Collects	No	No
Flipper	9.0 Excellent	2588	Collects	Yes	Yes
Energyhelpline	9.0 Excellent	2458	Collects	Yes	Yes
Lookaftermybills	9.0 Excellent	2141	Claimed	Yes	Some
Quotezone	8.9 Great	213	Claimed	No	No
Switchd	8.9 Great	72	Collects	No	Some
SimplySwitch	8.7 Great	4184	Collects	Yes	Some
Money Supermarket	8.6 Great	568	Collects	Yes	Yes
Split The Bills	7.1 Good	1839	Collects	Yes	Some
(b) Advising business customers					
Switch My Business	9.8 Excellent	1629	Collects	Yes	Some (few)
Energy Advice Line	9.8 Excellent	697	Collects	Yes	Yes
UCR Consultants	9.8 Excellent	107	Collects	No	Yes
Utility Bidder	9.7 Excellent	858	Collects	Yes	Some (few)
BEC Consultants	9.7 Excellent	118	Collects	No	Yes
Energy Pig	9.6 Excellent	117	Collects	No	Yes
Guild Energy	9.6 Excellent	83	Collects	Yes	No
EDJ services	9.6 Excellent	56	Collects	No	No
Moneypug	9.5 Excellent	714 (I)	Claimed	No	No
Can Solutions Ltd	9.4 Excellent	153	Collects	Yes	Yes
Love Energy Savings	9.3 Excellent	8970	Collects	Yes	Some
BAS Energy	9.2 Excellent	196	Claimed	Yes	Some
Smarter Business	9.1 Excellent	111	Claimed	Yes	Some
The EPC Man	9.0 Excellent	82	Collects	No	Some
Homeshift	8.9 Great	252	Collects	No	Some
A&M Energy Solutions	8.8 Great	112	Collects	Yes	Yes
Energy Price Finder	8.6 Great	578	Claimed	No	No
Quotemyenergy	8.6 Great	79 (I)	Claimed	No	No
ICE Comms	8.5 Great	596	Collects	No	Some
Watt Utilities	8.4 Great	201	Claimed	Yes	No
Utility Hive	8.3 Great	58	Claimed	No	Some
Free Price Compare	7.1 Good	84	Collects	No	Some

7.2 Trustpilot reviews of charitable and regulatory bodies

All manner of organisations are reviewed on Trustpilot. Table 12 shows the (original and adjusted) TrustScores for (a) five charitable and regulatory organisations that advise energy customers or regulate energy suppliers, and (b) four other Ombudsman services, as of 1 June 2019 (and on the right updated to 3 July 2020).

In 2019, all these organisations had very low (unadjusted) TrustScores, ranging from 2.4 down to 0.9 out of 10. (The arrows go from the original TrustScores to the adjusted TrustScores.) All were classified as Bad. Six claimed their Trustpilot site, three did not. None subscribed to Trustpilot. Three responded to some reviews, six did not.

Table 12 Trustpilot reviews of charitable and regulatory organisations

Organisation	1 June 2019					3 July 2020			
	Trust Score		# reviews	Claimed?	Replies?	Trust Score		#	Replies?
Citizens Advice	2.4 →2.0	Bad	43	No	No	2.1	Poor	99	No
Which?	1.7 →1.7	Bad	138	Yes	Yes	2	Poor	244	98%
Ofgem	1.6→1.6	Bad	31	No	No	1.4	Bad	49	No
Age UK	1.4 →1.6	Bad	36	Yes	No	1.4	Bad	74	100%
Ombudsman Services:Energy	1.1 →1.4	Bad	374	Yes	Yes	1.6	Bad	589	76%
Ofcom			7	No	No	1.9	Poor	20	No
Legal Ombudsman	1.3→1.5	Bad	49	No	No	1.3	Bad		No
Parliamentary &HealthService Ombudsman	1.2 →1.5	Bad	45	Yes	No	1.3	Bad	107	No
Financial Ombudsman	0.9 →1.4	Bad	322	Yes	No	1.4	Bad	106	No
The Motor Ombudsman	0.9 →1.4	Bad	160	Yes	Some	1.5	Bad	579	55%

Citizens Advice had a TrustScore of 2.4. Eight of 43 reviewers scored it Excellent but 27 (nearly two thirds) gave only 1 star (Bad). The reviews seem to reflect experience locally in the “network of 316 independent charities throughout the United Kingdom” rather than experience of Head Office. The main complaints seem to be about failure to answer the phone and/or call waiting times, lack of qualifications of many staff (though some are deemed excellent), and lack of assistance or support for the complainant.⁶⁵ The Citizens Advice Trustpilot site was unclaimed, hence there was no response to any of these reviews.

⁶⁵ There is also a very cogent review by a volunteer adviser for the organisation acknowledging that there are good and bad advisers, and supervisors, but suggesting that “... the real weakness of the CA is its business model. How can any organisation deliver excellent service when each of its offices are independent organisations? There is no central strategy for innovation, standards, training protocols, management style expectations, learning programmes etc etc. Like many charities, business wise it is in the dark ages. So think of us highly motivated and thoroughly

Which? had a TrustScore of 1.7 based on 138 reviews (8% rated it Excellent, 64% Bad). Which? had been responding to reviews since mid-2018. Of the 80 reviews since that time, over half related to subscriptions to Which?, including as to marketing tactics and particularly complaints about the difficulty in unsubscribing from Which?

Age UK (the country's largest charity working with older people) had a TrustScore of 1.4 based on 36 reviews (2 rated it Excellent, 31 rated it Bad). It has not offered an energy product since 2016, when its two year fixed price tariff with E.On was found to be somewhat out of the market, but it still offers advice on getting the best energy deal. Several Trustpilot reviews imply a lack of customer service, while nearly a half related to excessive charges for its insurance policies. Age UK had claimed its Trustpilot site, but had not responded to any of the reviews.⁶⁶

Ombudsman Services, which handles unresolved energy and communications complaints, had a TrustScore of 1.1 (based on 22 Excellent reviews and 333 Bad). The comparably low scores for four other Ombudsman organisations suggest that this is a thankless task. Ombudsman Services responded very courteously to all reviews, and was quite active in flagging inappropriate reviews (12 out of 97 since 1 January 2019). The Motor Ombudsman was also active, flagging 20 out of 138 reviews, and also responded to some reviews. There must be many users who have had satisfactory outcomes from all these Ombudsman services whose voices are simply not heard, but apparently these organisations made no attempt to invite these users to provide reviews.

Ofgem, too, has a Trustpilot site.⁶⁷ 31 reviews of Ofgem yielded 1 Excellent rating, 1 Average, 2 Poor and 27 Bad, and a TrustScore of 1.6. In June 2019 this was higher than four of the Large suppliers (SSE, E.On, Scottish Power and nPower) and the Ombudsman services, but lower than almost all the other energy suppliers, all the PCWs, Citizens Advice and Which? Ofgem has not claimed its Trustpilot website and hence has not sought to explain itself to these aggrieved customers.

About half the reviewers complained about Ofgem's lack of action and failure to keep prices down. No doubt some of these comments are unreasonable or uninformed, and reflect a lack of understanding of Ofgem's precise duties and the limits of its powers. Nonetheless, many reviewers hold Ofgem responsible for inadequate measures to prevent energy price increases.

Over a quarter of the reviewers in 2019 had another sore point: they complained about Ofgem's supplier of last resort policy, particularly transferring customers of Oneselect (in December

committed volunteers - it isn't us who are the problem but the way CA is organised and some of us have little choice about this, despite a hugely costly centralised executive team. Here is where real change must lie." Trustpilot review of Citizens Advice by cilly filly, 5 February 2019.

⁶⁶ Its performance stood in contrast to that of its onetime trading company Age UK Mobility Aids, which from November 2014 to January 2017 attracted 133 reviews of which 85% were Excellent. A third age-related company is the commercial financial adviser Age Partnership, which in June 2019 had 4877 reviews of which 90% were Excellent. (These latter two companies are not shown here.)

⁶⁷ Surprisingly, there are no Trustpilot sites for Ofwat or the Office of Rail and Road. Ofcom had only 7 reviews (1 Excellent and 6 Bad) as at June 2019.

2018) to another supplier (Together Energy) whose customer service they did not regard as adequate. There seems some substance in this.⁶⁸

The right hand side of Table 12 gives some updated TrustScores and number of reviews from 3 July 2020. Which? shows the most significant improvement, and is now Poor rather than Bad.

The extent of the gap in TrustScores between these non-commercial organisations and the commercial ones seems remarkable. It is perhaps not surprising to those used to dealing with customers on Trustpilot. None of these non-commercial organisations has yet invited customer reviews as a means of improving its understanding of what customers want, its ability to respond to them, or its quality of service as perceived by other customers.

8. Conclusions

Trustpilot is a vehicle by which customers can express their views about any company, and increasingly they are doing so, increasingly at the invitation of the companies themselves. There have been some concerns about Trustpilot and the way in which some suppliers use it, but a March 2019 critique in *The Times* does not present any new or damning evidence against Trustpilot or the companies that use it, and successive CMA investigations have not accused Trustpilot of bad practice. Indeed, Trustpilot supports the CMA's proposals, and is continually updating its own policy in order to maintain trust in its website.

An examination of four consumer markets - supermarkets, banking, mobile phones and retail energy – shows that in April 2019 retail energy providers made most use of Trustpilot and supermarkets made least. The former incumbent companies had very low TrustScores, made little or no use of Trustpilot, and seemed to be out of touch with the customers that use Trustpilot and heedless of their complaints. They were very poorly ranked by customers. In contrast, the smaller new entrants encouraged their customers to review them, and generally got better reviews. Trustpilot thus seems to be a means of facilitating new entry into a market, but also a means of discovering and providing what customers want.

A year or so later, in June 2020, there was increasing use of Trustpilot in all these markets, especially by energy suppliers and least by supermarkets. All but one of the large former incumbent energy suppliers began to invite and respond to customer reviews, as a means both of increasing their understanding of and response to customer concerns, and of increasing their TrustScores. Detailed studies of several particular suppliers show how effective such invitations can be in increasing TrustScores within a matter of months.

Over 30 energy advisory organisations (PCWs, auto-switching sites and energy consultancies) have TrustScores of Good or better. This is in contrast to the other markets studied. Providing advice on energy suppliers is a new market, so none of these companies is an incumbent from an earlier era: they are probably all relatively newly established, and very familiar with online communication. In contrast, nine charitable and regulatory organisations, including Ofgem, all

⁶⁸ Which?, Citizens Advice and Trustpilot all ranked Together Energy about seventh from bottom of the 26 suppliers studied in this paper. Its TrustScore had fallen from 5.4 to 4.4 from February to June 2019 (the biggest fall of any supplier in that time), and its Trustpilot site included complaints about this transfer.

had and have TrustScore ratings of Poor and/or Bad. With few exceptions, they do not invite or respond to reviews. They might wish to consider the extent of the gap in TrustScores.

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Appendix One: The Times critique of Trustpilot

In March 2019 *The Times* newspaper carried a nearly-full-page article on Trustpilot.⁶⁹ The experiences and concerns that it describes with several examples (two of the main ones dating back to 2016!) seem not dissimilar to what is observed and/or what some suspect happens in the energy supply sector. This Appendix assesses and comments on the criticisms in the article.

First, the headline of the article is “Firms pay Trustpilot to filter reviews”. On further reading, this refers to the ability of subscribing firms to “use the company’s [Trustpilot’s] technology to filter the reviews they place on their own website or corporate Facebook pages, allowing customers to read only favourable posts”.

Comment: Trustpilot says that it is normal for businesses to select favourable promotional material for their own websites. So, for example, while some companies give their TrustScore on their websites, others might select one or a few five star reviews. As illustrated further below, there seems to be no filtering of reviews – or plausible allegation of filtering – on the Trustpilot profile pages.

Second, some companies have exhibited remarkable increases in number of responses. One company (Vanquis Bank) is said to have gone from one review on one day to 296 reviews the next day. Another company went from five reviews in one month with an average of 2.2 stars to 467 reviews the next month with almost all of them generating five stars.

Comment: These are perhaps extreme examples but that kind of impact is not inconsistent with some experiences in the retail energy sector (see main text). Customers can indeed be encouraged to talk about their experiences, even if sometimes rather briefly. Many of them with no criticism to make give five stars.

Trustpilot specifies that companies must not selectively invite customers to give reviews. The interpretation of “selectively” seems to offer some latitude. So, for example, it seems permissible for an energy supplier to invite a random sample of customers who have joined the company recently enough for nothing to have gone wrong (but with memories of their unsatisfactory old supplier still fresh), and such customers might be expected to give good reviews.

The Trustpilot profile page for Vanquis Bank says that it “Sometimes offers incentives to its customers to leave reviews (whether positive or negative)”. Hitherto, Trustpilot has not prohibited incentives to leave reviews, provided that this is declared to Trustpilot and shown on the company’s Trustpilot profile page. However, it is not permissible to offer an incentive for good reviews. There is at least one recent case of this happening in the domestic energy sector, but also evidence that Trustpilot has taken action to enforce its rules.⁷⁰ Trustpilot’s revised and present stance is that companies are not allowed to offer any incentive to provide reviews.

⁶⁹ “Firms pay Trustpilot to filter reviews”, *The Times*, March 23, 2019, p 21.

⁷⁰ “Small energy supplier Eversmart Energy has apologised after 1,000 customers were sent an email offering an incentive for leaving a five-star review. Customers were told a £10 energy credit would be applied to their accounts if they gave the firm a five-star rating and comment on review website Trustpilot. ... Eversmart’s follow-up email [to customers] said “... Our [recent] email was meant to inform you that we’d be awarding £10 credit to every review we received, from 1 star to 5 stars.” ... Trustpilot said it received several complaints about the use of

Third, it is said that “the online estate agent Purplebricks ... has 62,000 Trustpilot reviews and a TrustScore of 9.5 out of ten. By comparison, Countrywide, one of Britain’s largest estate agents, has only 123 reviews and a score of one out of ten. Countrywide is not a paying subscriber to Trustpilot but Purplebricks is.”

Comment: This is misleading. Paying or not paying the Trustpilot subscription is not what has led to this differential outcome. Rather, Purplebricks has invited its customers to respond, and they have done so extensively and positively. Purplebricks has presumably paid to use Trustpilot services to issue these invitations because this was more economical than issuing the invitations itself. In contrast, Countrywide has not claimed its Trustpilot site, it has not invited its customers to review it, and has not responded to a single customer review. Indeed, it has shown no interest in interacting with its customers via this new medium of communication. The use or otherwise of Trustpilot seems to be just one illustration of the dramatically different market histories and policies of the two companies.⁷¹

As shown in the main text, this difference of approach parallels experience in the energy sector and elsewhere. As of early 2019, two of the Six Large incumbent energy suppliers showed little or no interest in responding to critical reviews on Trustpilot, or in encouraging further reviews, and had even lower TrustScores than Countrywide. In contrast, many of the new and smaller suppliers actively used Trustpilot and two of them had an even higher Trustscore than Purplebricks. (Interestingly, while both of the two energy suppliers mentioned subscribed to Trustpilot, one of them used Trustpilot to collect reviews while the other did not.)

Fourth, many small business owners are said to complain that Trustpilot is not helpful at removing fake or malicious reviews.

Comment: There have been some investigations and prosecutions in the UK and elsewhere for fake reviews. Following its 2015-2017 investigation, the CMA took enforcement action, including on 4 March 2016 against fake online reviews posted by the search engine optimisation (seo) company Total SEO. The CMA announced on 31 July 2017 that it was “joining international partners in a social media campaign to help stop fake and misleading online reviews and endorsements.” In June 2018 the British Standards Institution (BSI) published a new standard to ensure the validity of online reviews.⁷² In the US, the Federal Trade Commission

incentives in Eversmart Energy’s email, and issued a warning to the firm in April.” *MoneySavingExpert News*, 24 May 2019. Eversmart Energy went out of business in September 2019.

⁷¹ Purplebricks, launched only five years ago, has reportedly acquired about 75% share of the online estate agency market and is now the second largest online estate agent in Britain, although it has over-expanded overseas. *The Times*, 8 May 2019, pp 33, 34, 35. Countrywide, the largest estate agent in Britain, has issued several profit warnings and has lost 95% of its share price value in the last year. *Estate Agent Today*, 30 May 2019. Note that Countrywide Conveyancing Services, which is part of the Countrywide Group, has a separate and claimed profile page, which on 28 August 2019 had a TrustScore of 7.8 based on 155 reviews.

⁷² “New measures brought in to tackle fake reviews”, Ben Stevens, www.retailgazette.co.uk/blog, June 21, 2018.

fined a retailer more than \$12 million in 2019 for buying four- and five-star reviews on Amazon (not on Trustpilot) for its branded diet pills.⁷³

Trustpilot says that it is in its own interest to prevent fake reviews, and that it takes steps to do so.⁷⁴ In April 2019, “Trustpilot sent a “cease and desist” letter to TOTO Energy after being shown WhatsApp messages appearing to show a member of staff telling others to post positive reviews on the site.”⁷⁵ It is not said whether there were any resulting positive reviews and if so whether they were removed from the site. But TOTO Energy went out of business in October 2019.

There is now evidence in the Trustpilot profile pages that over three-quarters of energy suppliers do request removal of inappropriate reviews (a very small fraction of all their reviews) and that Trustpilot goes through a due process and removes those reviews that breach its standards or that are not modified to comply with its standards. I cannot comment on the helpfulness or speed of Trustpilot’s vetting process, but it is in Trustpilot’s interest to assist in removing fake or malicious reviews, and the reviews that remain on the pages do not seem fake or malicious.

Fifth, it is said that “Trustpilot is failing to remove reviews with identical text”.

Comment: It does not seem in Trustpilot’s interests to fail to remove such reviews, and I have not seen any identical text in the reviews of the retail energy suppliers.

To conclude, *The Times* article provides interesting information about Trustpilot, which may be unfamiliar to most readers, but does not present any damning evidence against Trustpilot or the companies that use it. There are attempts to misuse the site but Trustpilot seems to take action to preserve its reputation. The article does show how use of Trustpilot differs significantly from one company to another, the reasons for which are explored in the body of the present paper. The article also shows that skilful timing of requests for customer reviews can yield a large number of good ratings, but companies that use Trustpilot explain that it enables them to provide better service. The Trustpilot profile pages therefore seem a useful indication of how companies are (or are not) meeting the expectations of their customers, particularly those customers who are accustomed to use of such media.

⁷³ <https://www.ftc.gov/news-events/press-releases/2019/02/ftc-brings-first-case-challenging-fake-paid-reviews-independent>

⁷⁴ “Trust is crucial to us, and we do not under any circumstances accept fabricated reviews. Fabricated reviews are those that do not reflect a genuine Service Experience, because, for example, they are created by or on behalf of the Company itself. ... We use specially developed software to detect fabricated reviews. Reviews that we deem fabricated, fake or similar will be deleted, moved or highlighted, and we are entitled to publish information about this in connection with the Company's profile on Trustpilot.” [source?]

⁷⁵ “Energy firm encouraged its staff to leave five-star reviews on Trustpilot ratings site”, Sam Meadows, *The Telegraph*, 15 April 2019. TOTO Energy said the message had been “misinterpreted and is out of context”.

Appendix Two: Trustpilot reviews of four sectors in 2020

Table A1 Trustpilot reviews of supermarkets, 10 June 2020

Supermarket	TrustScore (1-5)	No of reviews	Claimed?	Subscribes to Trustpilot?	Asks for reviews ?	Responds to reviews?	Flagged	Reviews 12 mos	% flagged
Ocado [Online]	4.2 Great	11,376	May 2014	No	Yes	17%	0	7753	0
Waitrose	2.3 Poor	1852	Apr 2020	No	No	18%	2	589	0.34
Co-op	2.3 Poor	554	May 2017	No	No	No	0	286	0
Tesco	2.3 Poor	5839	Oct 2014	No	No	No	0	1890	0
Marks & Spencer	2.3 Poor	3113	No	No	No	No	0	1159	0
Morrisons Online	2.2 Poor	3488	Mar 2016	No	No	No	0	1257	0
Aldi	2.1 Poor	2393	No	No	No	No	0	857	0
Iceland	2.1 Poor	2235	Aug 2015	No	No	No	0	1217	0
Lidl	2.0 Poor	1485	No	No	No	No	0	563	0
Morrisons	2.0 Poor	769	Aug 2017	No	No	No	0	467	0
Asda	1.7 Bad	6179	No	No	No	No	0	1693	0
Sainsbury's	1.7 Bad	4139	Feb 2017	No	No	No	0	2232	0
Total	12	43,422	8	0	1	2	2	19,963	0
Mean	2.27 Poor	3619	67%	0%	8%	17%		1664	
Median	2.15 Poor	2753	Aug 2016	No	No	No		1188	

Table A2 Trustpilot reviews of banks, 11 June 2020

(a) Top Half of claimed domains by TrustScore

Bank	TrustScore	No. of reviews	When claimed?	Subscribes ?	Asks for reviews ?	Responds to posts?	Flagged 12 mos	No. of reviews 12 mos	% flagged
Atom Bank	4.7 Excllnt	3513	Dec 2016	Yes	Yes	99%	11	832	1.32
Wylands	4.7 Excllnt ?	599	Feb 2019	Yes	Yes	No	1	599	0.17
London MC Union	4.7 Excllnt ?	377	Apr 2019	Yes	Yes	No	0	377	0.00
CharterSavgsBank	4.7Exclln↑	561	Sep 2018	Yes	Yes	97%	2	491	0.41
Starling Bank	4.5 Excllnt ↑	12,384	Jul 2017	Yes	Yes	25%	8	8436	0.09
Monzo	4.5 Excllnt ↑	8089	Sep 2016	Yes	Yes	9%	31	5496	0.56
SecureTrustBank	4.5 Excllnt ↑	552	May2018	Yes	Yes	99%	2	336	0.60
Card One Money	4.5 Excllnt ?	26	May2019	No	No	No	0	26	0.00
Suits Me	4.4 Excllnt	1159	Aug2019	Yes	Yes	96%	1	1159	0.09

	?								
Smart Save	4.4 Excllnt ?	197	Jun 2019	Yes	Yes	50%	1	198	0.51
Monese	4.3 Excllnt	15,648	Nov2016	Yes	Yes	36%	253	4537	5.58
U Account	4.3 Excllnt ↑	5071	Jan 2017	Yes	No	12%	12	866	1.39
Aldermore Bank	4.3 Ex↑↑↑↑	571	Dec 2018	No	No	6%	2	522	0.38
Amaiz	4.2 Great ?	126	Oct 2019	Yes	Yes	69%	6	129	4.65
Sainsbury's Bank	4.1 Great ↑	4891	Jun2018	Yes	Yes	No	1	3346	0.03
TallyMoney	4.1 Great ?	86	Feb 2019	No	Yes	100%	2	24	8.33
ThinkmoneyCuA cc	4.0 Great	2006	Apr 2015	Yes	Yes	89%	33	454	7.27
Tide Banking	4.0 Great	3369	Jul 2017	Yes	Yes	64%	7	1900	0.37
ANNA Money	3.9 Great ?	215	Apr 2019	No	Yes	96%	6	187	3.21
Triodos Bank UK	3.9 Great ?	49	Jan 2018	No	Yes	92%	5	30	16.6 7
Total	20	59,849					384	29945	1.28
Mean	4.5 Excllnt	2974		75% Yes	90% Yes	80% Yes	19.2	1497. 25	2.58
Median	4.35 Excllnt	585	Jun/Sep 2018			79% among Yes		507	
(b) Bottom Half of claimed domains by TrustScore									
Metro Bank	3.7 Ave ↓	2311	Nov2017	No	Yes	93%	21	1165	1.80
Bofin	3.7 Ave ?	26	Jun 2020	No	No	No	0	26	0.00
Al Rayan Bank	3.3 Ave ?	511	Nov2017	No	No	80%	5	338	1.48
Shawbrook Bank	3.2 Ave ↓	1022	Jun 2016	No	No	40%	1	117	0.85
Tandem	3.2 Ave ↓	815	Oct 2018	No	No	97%	0	395	0.00
Paragon Bank	2.9 Ave ?	186	Dec 2015	No	No	60%	10	61	16.3 9
Investec	2.6 Poor ?	37	Jan 2019	No	No	81%	2	29	6.90
CoinsBank	2.4 Poor	35	Mar2018	No	No	23%	0	10	0.00
myKredit	2.3 Poor ↓	45	Mar2016	No	No	No	0	3	0.00
First Direct	2.3 Poor	1993	Oct 2018	Yes	No	97%	1	790	0.13
RCI Bank	2.1 Poor ?	81	Feb 2020	No	No	No	0	70	0.00
Co-operative Bank	2.0 Poor	869	Mar2016	Yes	Yes	94%	3	349	0.86
Ford Money	1.9 Poor ?	141	Jul 2019	Yes	No	57%	0	138	0.00
Ikano	1.9 Poor √	38	Nov2019	Yes	No	52%	1	26	3.85
Smile UK	1.7 Bad	318	Oct 2017	No	No	97%	1	69	1.45
Barclays	1.5 Bad	2726	May2015	No	No	15%	4	1281	0.31
TSB	1.4 Bad ?	1197	Jan 2019	Yes	No	1%	0	342	0.00
Virgin Money UK	1.4 Bad	1227	Nov2016	No	No	97%	0	500	0.00

HSBC	1.4 Bad	3014	July2017In s agent	Yes	No	79%	12	1251	0.96
Tescobank	1.4 Bad	765	Jun 2016	No	No	No	0	206	0.00
Globalblue	1.3 Bad ?↑	54	Oct 2014	No	No	No	0	34	0.00
Total	21	14,397					49	5949	0.82
Mean	2.1 Poor	720		25% Yes	10% Yes	75% Yes			
Median	2.2 Poor	415	Nov2017			81% among Yes	1	128	
(c) Unclaimed domains									
Lloyds	1.8 Poor	993	No blurb	Lloydsbank.com			0	555	0
Lloyds tsb	1.3 Bad	266	No blurb	clicksafe.lloydstsb.com			0	27	0
Bank of Scotland	1.6 Bad	197	Blurb	bankofscotland.co.uk			0	89	0
Yorkshire Bank	1.4 Bad	229	Blurb	secure.ybonline.co.uk			0	133	0
Royal Bank of Scotland	1.4 Bad	416	Bank	rbs.co.uk			0	158	0
	1.7 Bad	133	Blurb	rbs.com			0	74	0
	2.2 Poor	16	Blurb	personal.rbs.co.uk			0	15	0
Natwest Bank	1.4 Bad	2188	Ins agent	Natwest.com			0	861	0
Santander	1.5 Bad	2395	Ins agent	Santander.co.uk			0	818	0
	1.8 Poor	22	Address	Santanderconsumer.co.uk			0	19	0
Clydesdale Bank	1.3 Bad	90	Blurb	secure.cbonline.co.uk			0	65	0
Total	11	6945	0	0	0	0	0	0	0
Mean	1.6 Bad	631							
Median	1.5 Bad	229							
Overall total	83845		41=79% claimed	20=39% subscribes	19=37% invites reviews	25=48% respon ds	445	39,95 9	
Overall mean	1612						11	768	1.11 %
Overall median	2.75 Ave- Poor	532	March 2018				2	271	0.41 %
Bank	TrustScore	No. of reviews	When claimed?	Sub- scribes?	Asks for reviews?	Respo nds to posts?	Flag ged 12 mos	No. of revie ws 12 mos	% flagg ed
Note: ↑ means increase in category compared to April 2019, ↓ means decrease, ? means not scored previously									

Table A3 Trustpilot reviews of mobile phone providers, 15 June 2020

Mobile provider	Trust Score		No. of reviews	Claimed ?	Subs ?	Asks ?	Responds?	Flagged	Last 12 mos	4G rating
Voxi	4.5	Exc	2820	Jan-20	Yes	Yes	4%	0	2636	4.5
Audacious	4.4	Exc	63	Sep-19	No	Yes	100%	0	63	4.0
Lebara	4.4	Exc	2794	Jun-15	Yes	No	85%	37	1048	3.5
Giffgaff	4.3	Great	7954	Mar-15	Yes	No	0	0	5211	4.0
UtilityWarehouse	4.2	Great	11,807	May-14	Yes	Yes	72%	299	4607	
smarty	4.2	Great	10,915	Nov-17	Yes	Yes	14%	1	7374	4.5
Lycamobile	3.8	Great	3052	Apr-16	Yes	Yes	92%	371	246	3.5
Asda Mobile	3.5	Ave	35	No					19	3.5
iD Mobile	3.4	Ave	4759	Nov-16	Yes	Yes	40%	8	132	4.0
TalkTalk	2.9	Ave	50,172	May-14	Yes	Yes	90%	80	16,612	2.5
Freedom Pop	2.8	Ave	1631	Jan-17	Yes	No	58%	3	132	3.0
Three (L)	2.6	Poor	14,271	Jan-15	Yes	Yes	89%	617	6205	4.0
Ctrl	2.4	Poor	13	Jul-19	Yes	No	0	4	3	2.5
Talkmobile	2.3	Poor	1197	May-15	No	No	0	0	44	3.5
Tesco Mobile	2.1	Poor	1039	Feb-17	No	No	80%	5	409	4.0
EE (L)	2	Poor	4860	Feb-18	Yes	No	87%	0	1345	4.5
Sky Mobile	1.4	Bad	5252	No	No	No	0	0	80	3.5
O2 (L)	1.5	Bad	4203	No					933	4.0
BT Mobile	1.4	Bad	6815	Jun-15	Yes	No	0	0	1446	4.0
Vodafone UK (L)	1.4	Bad	10,372	Nov-16	Yes	No	97%	2	2530	4.5
Plusnet Mobile	1.4	Bad	5785	May-14	No	No	95%	27	1367	4.0
Virgin Mobile	1.2	Bad	2014	Jan-18	Yes	No	0	0	674	4.0
Total	22									
Mean	2.8	Ave	6668	Jul-16, 91% Yes	73%	36%	64% Yes	73 12/22 =55%	2309	3.8
Median	2.7	Poor	3628	Jul-16				2.5	991	4.0

Table A4.1 Trustpilot reviews of 25 energy supplier domains 18 June 2020

Domain Name	Size	Trust Score		Volume reviews	Claimed	Subs	asks	respon ds	flagged last 12 mos	Vol reviews 12 mos	% flag
octopus.energy	M	4.8	E	28810	Feb-16	Yes	Y	2%	46	18757	0.25
so.energy	S	4.8	E	4458	Nov-15	Yes	Y	4%	38	2274	1.67
avroenergy.co.uk	M	4.7	E	33727	Dec-17	Yes	Y	0%	8	14556	0.05
bulb.co.uk	M	4.7	E	47608	Sep-15	Yes	Y	6%	5	28119	0.02
edfenergy.com	L	4.3	E	9122	May-14	Yes	Y	99%	17	5780	0.29
ovoenergy.com	M	4.3	E	37094	Jun-14	Yes	Y	19%	46	9454	0.49
cooperativeenergy.coop	M	4.2	G	2536	Aug-15	No	N	0%	5	1063	0.47
greennetworkenergy.co.uk	M	4.2	G	7442	Mar-17	Yes	Y	98%	101	4053	2.49
isupplyenergy.co.uk	S	4.2	G	10534	May-15	Yes	Y	99%	6	2962	0.20
utilitywarehouse.co.uk	M	4.2	G	11841	May-14	Yes	Y	72%	301	4637	6.49
utilita.co.uk	M	4	G	21855	Jan-17	Yes	Y	73%	10	1592	0.63
bristol-energy.co.uk	S	3.8	G	1598	Dec-16	Yes	Y	99%	3	668	0.45
robinhoodenergy.co.uk	S	3.8	G	2197	Aug-17	Yes	Y	90%	2	313	0.64
scottishpower.co.uk	L	3.8	G	7866	May-19	Yes	Y	19%	41	7307	0.56
tonikenergy.com	S	3.8	G	7524	Dec-16	Yes	Y	35%	2	3690	0.05
britishgas.co.uk	L	3.7	A	35206	May-14	Yes	Y	75%	509	27982	1.82
eonenergy.com	L	3.7	A	10388	Sep-15	Yes	Y	31%	7	8347	0.08
shellenergy.co.uk	M	3.7	A	43418	May-14	Yes	Y	98%	11	4769	0.23
sse.co.uk	L	3.6	A	911	Jul-19	Yes	Y	13%	0	653	0.00
mygreenstarenergy.com	M	2.8	A	7813	Oct-15	Yes	Y	99%	5	2625	0.19
ecotricity.co.uk	S	2.6	P	1340	Nov-17	Yes	Y	98%	113	573	19.72
togetherenergy.co.uk	S	2.1	P	7174	Apr-17	Yes	N	18%	4	2306	0.17
sse.com	L	1.4	B	1204	Apr-20	No	N	0%	0	557	0.00
npower.com	L	1.2	B	2489	May-15	No	N	37%	0	582	0.00
scottishpower.com	L	1.1	B	5336	Apr-19	Yes	N	87%	77	2252	3.42
Mean		3.58	A	13,980	100% Jul-16	22/25 =88%	20/25 =80%	51%	54	6235	1.62
Median		3.8	G	7813	Feb-16			37%	8	2962	0.29

Table A4.2 Trustpilot reviews of 44 energy supplier domains 18 June 2020

Domain Name	Size	Trust Score		No. reviews	Claimed	Subs	asks	Responds, flags & reviews last 12 mos			%
octopus.energy	M	4.8	E	28810	Feb-16	Yes	Y	2%	46	18757	0.25
so.energy	S	4.8	E	4458	Nov-15	Yes	Y	4%	38	2274	1.67
avroenergy.co.uk	M	4.7	E	33727	Dec-17	Yes	Y	0%	8	14556	0.05
bulb.co.uk	M	4.7	E	47608	Sep-15	Yes	Y	6%	5	28119	0.02
zebrapower.co.uk	S	4.7	E	189	Dec-17	No	N	100%	0	158	0.00
zogenergy.com	S	4.7	E	160	Mar-18	No	N	5%	0	57	0.00
enticenergy.com	S	4.6	E	88	Feb-17	No	N	28%	1	54	1.85
esbenergy.co.uk	S	4.6	E	1449	Jan-20	Yes	Y	94%	3	1322	0.23
greenenergyuk.com	S	4.5	E	925	Aug-16	Yes	Y	91%	10	275	3.64
gulfgasandpower.uk	S	4.5	E	1166	Jun-18	Yes	Y	100%	2	870	0.23
igloo.energy	S	4.5	E	1060	Jul-17	Yes	Y	53%	13	317	4.10
purepla.net	S	4.4	E	6576	May-17	Yes	Y	15%	50	2907	1.72
e.org	S	4.3	E	467	Aug-19	No	N	0%	17	388	4.38
edfenergy.com	L	4.3	E	9122	May-14	Yes	Y	99%	17	5780	0.29
ovoenergy.com	M	4.3	E	37094	Jun-14	Yes	Y	19%	46	9454	0.49
cooperativeenergy.coop	M	4.2	G	2536	Aug-15	No	N	0%	5	1063	0.47
greennetworkenergy.co.	M	4.2	G	7442	Mar-17	Yes	Y	98%	101	4053	2.49
isupplyenergy.co.uk	S	4.2	G	10534	May-15	Yes	Y	99%	6	2962	0.20
utilitypoint.co.uk	S	4.2	G	4890	Dec-17	Yes	Y	42%	92	3786	2.43
utilitywarehouse.co.uk	M	4.2	G	11841	May-14	Yes	Y	72%	301	4637	6.49
foxgloveenergy.co.uk	S	4.1	G	546	Mar-19	Yes	Y	99%	10	390	2.56
goodenergy.co.uk	S	4.1	G	2624	Apr-17	Yes	Y	97%	0	900	0.00
orbitenergy.co.uk	S	4	G	2156	Dec-17	Yes	Y	58%	6	1733	0.35
utilita.co.uk	M	4	G	21855	Jan-17	Yes	Y	73%	10	1592	0.63
bristol-energy.co.uk	S	3.8	G	1598	Dec-16	Yes	Y	99%	3	668	0.45
robinhoodenergy.co.uk	S	3.8	G	2197	Aug-17	Yes	Y	90%	2	313	0.64
scottishpower.co.uk	L	3.8	G	7866	May-19	Yes	Y	19%	41	7307	0.56
tonikenergy.com	S	3.8	G	7524	Dec-16	Yes	Y	35%	2	3690	0.05
britishgas.co.uk	L	3.7	A	35206	May-14	Yes	Y	75%	509	27982	1.82
eonenergy.com	L	3.7	A	10388	Sep-15	Yes	Y	31%	7	8347	0.08
pfpenenergy.co.uk	S	3.7	A	2833	Sep-17	Yes	Y	98%	57	670	8.51
shellenergy.co.uk	M	3.7	A	43418	May-14	Yes	Y	98%	11	4769	0.23
sse.co.uk	L	3.6	A	911	Jul-19	Yes	Y	13%	0	653	0.00
ye.co.uk [Yorkshire En]	VS	3.5	A	805	Apr-18	No	Y	67%	3	495	0.61
goeffortless	S	3.3	A	1	No	No	N	0%	0	1	0
mygreenstarenergy.com	M	2.8	A	7813	Oct-15	Yes	Y	99%	5	2625	0.19
ecotricity.co.uk	S	2.6	P	1340	Nov-17	Yes	Y	98%	113	573	19.72
daligas.co.uk	VS	2.1	P	81	No	No	N	0%	0	15	0.00
togetherenergy.co.uk	S	2.1	P	7174	Apr-17	Yes	N	18%	4	2306	0.17
enstroga.co.uk	S	1.9	P	881	Jul-18	Yes	N	33%	85	461	18.44
nabuhenergy.co.uk	S	1.5	B	322	Jul-17	No	N	91%	1	233	0.43
sse.com	L	1.4	B	1204	Apr-20	No	N	0%	0	557	0.00
npower.com	L	1.2	B	2489	May-15	No	N	37%	0	582	0.00
scottishpower.com	L	1.1	B	5336	Apr-19	Yes	N	87%	77	2252	3.42
Mean		3.697		8561.5		34/45	53	38.79	388		
Median		4.05		2580	Apr-17	=0.76	%	545	4.16	2.04	Mean

Table A4.3 Trustpilot reviews of 65 domestic energy supplier domains 18 June 2020

Domain Name	Size	Trust Score	No. of reviews	Claimed	Subs	asks	Responds, flags & reviews last 12 mos			% flagged
assured.energy*		4.9	185	Sep-17	Yes	Y	98%	0	124	0.00
mandsenergy.com		4.9	1232	Oct-18	Yes	Y	1%	0	1044	0.00
affectenergy.com		4.8	2066	May-16	Yes	N	3%	0	116	0.00
green.energy		4.8	3230	Apr-19	Yes	Y	66%	38	3246	1.17
octopus.energy	M	4.8	28810	Feb-16	Yes	Y	2%	46	18757	0.25
so.energy	S	4.8	4458	Nov-15	Yes	Y	4%	38	2274	1.67
avroenergy.co.uk	M	4.7	33727	Dec-17	Yes	Y	0%	8	14556	0.05
bulb.co.uk	M	4.7	47608	Sep-15	Yes	Y	6%	5	28119	0.02
neonreef.co.uk		4.7	106	Jul-19	Yes	N	93%	1	107	0.93
zebrapower.co.uk	S	4.7	189	Dec-17	No	N	100%	0	158	0.00
zogenenergy.com	S	4.7	160	Mar-18	No	N	5%	0	57	0.00
bluegreenenergy.com		4.6	435	Nov-19	Yes	Y	6%	0	435	0.00
enticeenergy.com	S	4.6	88	Feb-17	No	N	28%	1	54	1.85
esbenergy.co.uk	S	4.6	1449	Jan-20	Yes	Y	94%	3	1322	0.23
mylondonpower.com		4.6	34	Jan-20	No	Y	6%	0	34	0.00
goto.energy		4.5	422	Mar-19	Yes	Y	100%	3	417	0.72
greenenergyuk.com	S	4.5	925	Aug-16	Yes	y	91%	10	275	3.64
gulfgasandpower.uk	S	4.5	1166	Jun-18	Yes	Y	100%	2	870	0.23
igloo.energy	S	4.5	1060	Jul-17	Yes	Y	53%	13	317	4.10
moneyplusenergy.com		4.5	23	Oct-19	No	N	4%	0	23	0.00
outfoxthemarket.co.uk		4.5	21045	Sep-17	Yes	Y	100%	34	13741	0.25
peoplesenergy.co.uk		4.5	2166	Nov-17	Yes	N	58%	8	1813	0.44
purepla.net	S	4.4	6576	May-17	Yes	Y	15%	50	2907	1.72
e.org	S	4.3	467	Aug-19	No	N	0%	17	388	4.38
edfenergy.com	L	4.3	9122	May-14	Yes	Y	99%	17	5780	0.29
ovoenergy.com	M	4.3	37094	Jun-14	Yes	Y	19%	46	9454	0.49
simplicity.co.uk		4.3	1875	Feb-19	Yes	Y	99%	13	1312	0.99
cooperativeenergy.coop	M	4.2	2536	Aug-15	No	N	0%	5	1063	0.47
greennetworkenergy.co.uk	M	4.2	7442	Mar-17	Yes	Y	98%	101	4053	2.49
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foxgloveenergy.co.uk	S	4.1	546	Mar-19	Yes	Y	99%	10	390	2.56
goodenergy.co.uk	S	4.1	2624	Apr-17	Yes	Y	97%	0	900	0.00
sainsburysenergy.com		4.1	174	May-19	Yes	N	75%	0	60	0.00

boostpower.co.uk		4	5401	Sep-17	Yes	Y	26%	7	3264	0.21
economyseven.co.uk		4	509	Dec-17	Yes	Y	99%	3	387	0.78
orbitenergy.co.uk	S	4	2156	Dec-17	Yes	Y	58%	6	1733	0.35
social.energy		4	101	Jul-19	Yes	Y	78%	6	103	5.83
sparkenergy.co.uk		4	29740	Sep-15	Yes	Y	14%	45	7844	0.57
utilita.co.uk	M	4	21855	Jan-17	Yes	Y	73%	10	1592	0.63
bristol-energy.co.uk	S	3.8	1598	Dec-16	Yes	Y	99%	3	668	0.45
ebico.org.uk		3.8	2004	Aug-17	Yes	Y	0%	0	249	0.00
robinhoodenergy.co.uk	S	3.8	2197	Aug-17	Yes	Y	90%	2	313	0.64
scottishpower.co.uk	L	3.8	7866	May-19	Yes	Y	19%	41	7307	0.56
tonikenergy.com	S	3.8	7524	Dec-16	Yes	Y	35%	2	3690	0.05
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eonenergy.com	L	3.7	10388	Sep-15	Yes	Y	31%	7	8347	0.08
eversmartenergy.co.uk		3.7	1560	Aug-17	No	Y	2%	6	190	3.16
pfpenenergy.co.uk	S	3.7	2833	Sep-17	Yes	Y	98%	57	670	8.51
shellenergy.co.uk	M	3.7	43418	May-14	Yes	Y	98%	11	4769	0.23
sse.co.uk	L	3.6	911	Jul-19	Yes	Y	13%	0	653	0.00
totoenergy.com		3.5	1512	Mar-17	No	Y	49%	81	2269	3.57
ye.co.uk [Yorkshire Energy]	S	3.5	805	Apr-18	No	Y	67%	3	495	0.61
lumoapp.co.uk		3.1	1044	Jul-18	No	Y	49%	3	486	0.62
powershop.co.uk		3	367	Mar-17	Yes	N	39%	2	117	1.71
mygreenstarenergy.com	M	2.8	7813	Oct-15	Yes	Y	99%	5	2625	0.19
symbioenergy.co.uk		2.8	380	Jan-19	No	N	85%	10	348	2.87
ecotricity.co.uk	S	2.6	1340	Nov-17	Yes	Y	98%	113	573	19.72
togetherenergy.co.uk	S	2.1	7174	Apr-17	Yes	N	18%	4	2306	0.17
enstroga.co.uk	S	1.9	881	Jul-18	Yes	N	33%	85	461	18.44
nabuhenergy.co.uk	S	1.5	322	Jul-17	No	N	91%	1	233	0.43
sse.com	L	1.4	1204	Apr-20	No	N	0%	0	557	0.00
npower.com	L	1.2	2489	May-15	No	N	37%	0	582	0.00
scottishpower.com	L	1.1	5336	Apr-19	Yes	N	87%	77	2252	3.42
Mean		3.890769	6957.523	Jul-17	52/66=79%	48/66=73%	61/66=92%	52/66=79%	3209	
Median		4.1	2004	Sep-17					870	

- Correction: Assured Energy is a supplier to small businesses rather than to domestic customers.

Appendix Three Alternative calculations using Trustpilot scores

This Appendix briefly reports how the ranking of energy suppliers would be affected if different criteria were used to calculate the TrustScore. Suppose first that five star Excellent reviews are regarded as devalued, and a benchmark ranking is based on one to four stars only.

In Table A5, column 1 lists the 26 suppliers and columns 2 to 6 show, for each supplier, the percentage of Trustpilot reviews giving 5 to 1 stars (as of 7 June 2019). Columns 7 and 8 give the average score (adjusting for the previous percentages not always adding to 100) and rank of each supplier on this basis. Note that these averages are not time-discounted as are TrustScores. Columns 9 and 10 repeat for reviews giving 1 to 4 stars. The suppliers are listed in this order in Table 9. Six of the top eight suppliers are Medium size. Then come five Small (or Very Small) suppliers, then a mix of sizes, with the bottom six places held by the six Large suppliers.

Table A5 TrustScore rankings versus Non-Excellent rankings, 7 June 2019

Supplier	5* %	4* %	3* %	2* %	1* %	Average Score (1*-5*)	Rank Ave (1-5)	Average Score (1*-4*)	Rank Ave (1-4)	Rank per TrustScore 31 May 2019	TrustScore versus Ave (1-4)
So Energy	85	11	2	1	1	95.6	3	88.3	1	4	-3
Avro En	75	20	2	1	3	92.3	5	87.5	2	5	-3
Engie	84	11	1	0	4	94.2	4	79.7	3	3	0
Ovo	73	15	4	2	5	90.1	7	77.9	4	7	-3
Bulb	91	6	1	1	2	96.2	2	77.5	5	1.5	+3.5
Green N/W	58	22	8	4	8	83.6	9	76.2	6	8	-2
Octopus	91	5	1	1	2	96.4	1	75.0	7	1.5	+5.5
Shell (FU)	46	25	10	5	13	77.4	13	72.2	8	11.5	-3.5
Tonik En	78	12	2	3	6	90.3	6	71.7	9	6	+3
Flow	58	21	5	4	12	81.8	11	70.8	10	13.5	-3.5
R Hood En	65	16	5	3	11	84.2	8	68.6	11	9	+2
iSupply	44	22	10	7	17	73.8	14	66.5	12	11.5	+0.5
Bristol En	58	18	4	3	17	79.4	12	63.7	13	13.5	-0.5
Utility WH	66	14	3	3	14	83.0	10	62.5	14	10	+4
Co-op En	37	17	9	7	30	64.8	18	55.2	15	16	-1
Ecotricity	51	12	3	5	28	70.7	15	49.5	16	18	-2
Green Star	41	15	3	5	36	64.0	19	48.7	17	19	-2
Utilita	48	9	6	5	31	67.7	17	46.6	18	17	+1
Together	32	10	6	6	46	55.2	20	42.6	19	20	-1
Solarplicity	25	10	7	7	50	50.5	22	42.2	20	21	-1
EDF	52	7	3	4	33	68.3	16	41.5	21	15	+6
British Gas	31	9	5	6	49	53.4	21	40.6	22	22	0
SSE	10	3	2	3	81	31.3	23	29.5	23	23	0
E.On	7	2	2	3	87	28.1	24	28.5	24	24	0
nPower	3	2	2	3	92	24.9	25	28.3	25	25	0
Scot Power	2	1	1	2	95	23.0	26	26.8	26	26	0

Column 11 is the TrustScore ranking as of 31 May 2019. The final column 12 is the difference between these two rankings – in effect, extent to which a supplier has been ‘pulled up or down’ by ranking suppliers according to TrustScores rather than according to the average non-Excellent Trustpilot rating. Interestingly, there is much less difference between these two sets of rankings than between the previous two. Five suppliers (Bulb, Octopus, Tonik, Utility Warehouse and EDF) are ‘pulled up’ by TrustScores, by between 3 and 6 places (median 4 places). Five suppliers (So, Avro, Ovo, Shell and Flow) are ‘pulled down’ by 3 to 3.5 places (median 3 places). Five of the six Large energy suppliers are at the bottom of both rankings, neither pulled up or down.

Table A6 TrustScore rankings versus Bad Review rankings, 5 June 2019

Supplier	Days to reach last 20 1* reviews	Number of non-PPM customer accounts excl SVT3+	Standardised Days per 1m customers	Rank per standardised 1* star reviews	Rank per TrustScore 31 May 2019	Advantage TrustScore versus 1* reviews
Engie	269	150	40.4	1.0	3.0	-2.0
SSE	25	1597	39.9	2.0	23.0	-21.0
EDF	19	1956	37.2	3.0	15.0	-12.0
So Energy	153	150	23.0	4.0	4.0	0.0
Robin Hood Energy	138	150	20.7	5.0	9.0	-4.0
British Gas	5	3337	16.7	6.0	22.0	-16.0
E.On Energy	6	2114	12.7	7.0	24.0	-17.0
nPower	8	1504	12.0	8.0	25.0	-17.0
Scottish Power	6	1975	11.9	9.0	26.0	-17.0
Co-op Energy	32	340	10.9	10.0	16.0	-6.0
Octopus Energy	24	449	10.8	11.0	1.5	9.5
Tonik Energy	69	150	10.4	12.0	6.0	6.0
Bristol Energy	68	150	10.2	13.0	13.5	-0.5
Utility Warehouse	21	362	7.6	14.0	10.0	4.0
Bulb	8	845	6.8	15.0	1.5	13.5
Ovo	8	832	6.7	16.0	7.0	9.0
Avro	32	200	6.4	17.0	5.0	12.0
Green Network Energy	22	200	4.4	18.0	8.0	10.0
Ecotricity	41	100	4.1	19.0	18.0	1.0
Shell (First Utility)	6	678	4.1	20.0	11.5	8.5
Flow	33	100	3.3	21.0	13.5	7.5
Utilita	7	450	3.2	22.0	17.0	5.0
iSupply	21	150	3.2	23.0	11.5	11.5
Green Star Energy	2	222	0.4	24.0	19.0	5.0
Together Energy	2	150	0.3	25.0	20.0	5.0
Solarplicity	1	100	0.1	26.0	21.0	5.0

These calculations are not at all definitive, but they suggest that suppliers can indeed influence their rankings upwards by encouraging customers to give reviews when they are likely to be favourable. Medium suppliers have generally benefited from this (Bulb and Octopus, also Tonik,

are ‘pulled up’ significantly in both calculations). Most of the Large suppliers have not benefited in this way, and have been significantly ‘pulled down’ on one of the calculations.

Suppose, second, that the criterion is the number and frequency of Trustpilot one star Bad reviews. The first column of Table A6 lists the 26 suppliers discussed above, the second column lists the number of days that it has taken for that supplier to attract its 20 most recent One star (Bad) Trustpilot reviews (as of 5 June 2019). This ranges from one day for Solarplicity to 269 days for Engie, with a median of 21 days, but needs to be standardised for number of customers.

Column 3 lists the estimated number of customer accounts of that supplier as of December 2018. For the Large and Medium suppliers these data are taken from Ofgem tables⁷⁶, plus the author’s own rough estimates for the small and very small suppliers. The Ofgem estimates exclude PPM customers subject to the tariff cap, but most complaints in reviews of most suppliers seem not to relate particularly to PPM. The Table excludes customers who have been on SVTs for more than three years (with the six Large suppliers and also Utility Warehouse), on the grounds that such customers are unlikely to be the source of many serious complaints. It is possible that, since December 2018, the Large suppliers have slightly fewer customers and some of the Medium and Small suppliers have more (particularly Ovo).

Column 4 standardises the time to attract 20 Bad reviews to that of the same supplier with a hypothetical 1 million such customers. The range is now 0.1 days for standardised Solarplicity to 40 days for standardised Engie, with a median of about 9 days.

Column 5 ranks the suppliers on this standardised basis. Column 6 ranks the suppliers on the basis of TrustScores on 31 May 2019. The final Column 7 is the difference between these two rankings. In effect, it indicates the extent to which a supplier has been ‘pulled up or down’ by ranking suppliers according to TrustScores rather than according to standardised Bad scores.

Table A6 suggests that the six Large energy suppliers have been pulled down – relative to a standardised Bad score benchmark - by between 12 and 21 places (median 17 places) as a result of this ranking. SSE has been particularly disadvantaged. In contrast, five Medium suppliers and two Small suppliers have been pulled up by between 8.5 and 13.5 places (median 10 places). The remaining 13 suppliers have been pulled up slightly on average (range from down 6 places to up 7.5 places, median up 4 places). Interestingly, Engie, a supplier that has recently put particular effort into inviting reviews, is nonetheless still pulled down slightly by the TrustScore process.

Suppose, third, that one-star reviews should also be excluded, as well as five-star ones, on the grounds that many of them reflect an intemperate response. An analogous calculation suggests that Engie, Avro Energy and So Energy would come top of such a non-extreme ranking, while the Large suppliers would take up six of the bottom nine positions, along with Utilita, Together Energy and Solarplicity. Tonik Energy and Octopus Energy would be ‘pulled up’ by TrustScores

⁷⁶ <https://www.ofgem.gov.uk/data-portal/number-non-price-protected-domestic-customer-accounts-supplier-standard-variable-fixed-and-other-tariffs-gb>

relative to this benchmark, and Bristol Energy, Flow and Green Star Energy would be ‘pulled down’.

Appendix Four Ratings of supplier apps

Table A 7 Ratings of retail supplier apps on Google and AppleStore, 7 -9 September 2020

Google			Apple Store		
Retailer	Score	Number of reports	Retailer	Score	Number of reports
Bulb	4.8	12,330	Goto Energy	5	9
Shell Energy Top Up	4.7	121	Shell En Top Up	4.8	422
Octopus Watch	4.7	80	Bulb	4.8	103,100
Economy En	4.6	648	My SSE	4.8	4,700
Utilita	4.6	9,369	Octopus Watch	4.8	250
My SSE	4.5	994	Boost Power	4.7	332
EDF	4.4	6,046	E	4.7	10,500
Ovo	4.3	5,234	EDF	4.6	32,746
Boost Power Ovo	4.1	1,915	EconomyEnergy topup	4.6	1,618
Sainsbury’s En	4	6	Good Energy	4.6	5,948
Shell Energy	3.9	1,034	Ovo	4.6	2,946
Good Energy	3.9	1,529	Spark swiftpayg	4.5	2,000
E.On	3.7	7,388	Igloo En	4.5	176
Utilita Mobile	3.7	38	Lumo Energy UK	4.4	597
npower	3.7	10,484	Eversmart	4.3	224
Robin Hood En	3.6	29	Octopus Watchdog	4.3	5
GoTo Energy	3.3	7	npower	4.1	17,825
E	3.2	342	Bristol En	3.9	29
Bristol Energy	3.2	51	Utilita mobile	3.8	32
npower select	3.2	26	E.ON Energy	3.3	4,500
igloo	3.2	96	Robin Hood En	3.3	11
E.On Home	3.1	77	Pure Planet	3	258
Ebico	3.1	15	Social Energy	3	11
Scottish Power	2.9	7,005	UW Clubhouse	3	96
Social Energy	2.8	17	Green NW En	2.9	14
British Gas	2.7	22,801	British Gas	2.7	13,200
UW Clubhouse	2.3	51	My Utilita	2.7	795
Green Star En	2.2	214	Npwer Select	2.5	19
Green NW En	2.1	772	Octopus Energy	2.3	221
Green	2.1	125	Coop En	2.3	3
Live (BG)	2	123	Ecotricity	2.1	43
Ecotricity	2	423			
PowerUP SP	1.8	127			
Spark Energy	1.7	292			
Octopus Agile En	1.7	6			
Coop En	1.6	33			
Nabuh En	1.5	276			