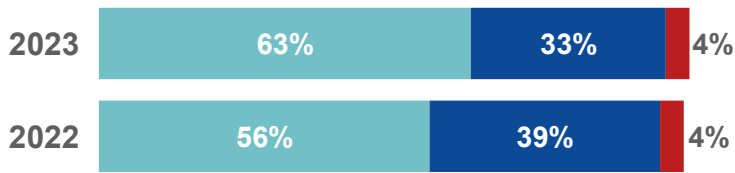


FINANCIAL ISSUES

PAYMENT DIFFICULTIES

ELECTRICITY



GAS



■ Never struggle to pay bill
 ■ Sometimes struggle to pay bill
 ■ Often/always struggle to pay bill

% who had gone without essentials to pay for their energy in the last 12 months

9% of electricity consumers



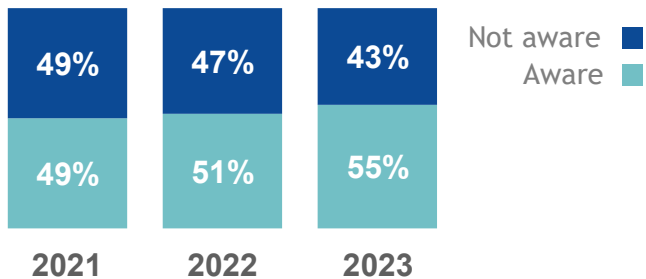
10% of gas consumers



- In the last 12 months 6% of electricity consumers and 10% of gas consumers had borrowed money to pay for their electricity or gas.
- 13% of those who have or live with someone who has a disability or illness had borrowed money to pay for their electricity, compared to 5% who do not have or live with someone who has a disability or illness.

AWARENESS OF CONSUMER PROTECTIONS AND SUPPORTS

AWARENESS OF SUPPLIER'S OBLIGATIONS TO PROTECT CONSUMERS



- Those who had self-disconnected from their gas (66%) or electricity (57%) supply were more likely to be unaware of consumer protections than those who had not (42% for both gas and electricity).
- Private renters (53%) were more likely to be unaware of consumer protections than those who owned their own homes (41%).

96% of vulnerable respondents had not signed up to any support services 2022 96%

51% of all respondents were aware of additional protections for vulnerable consumers 2022 41%

ENGAGEMENT WITH ENERGY SUPPLIER

% who read last written correspondence from supplier

50% of electricity consumers



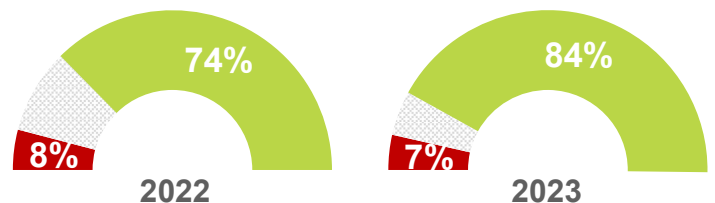
49% of gas consumers



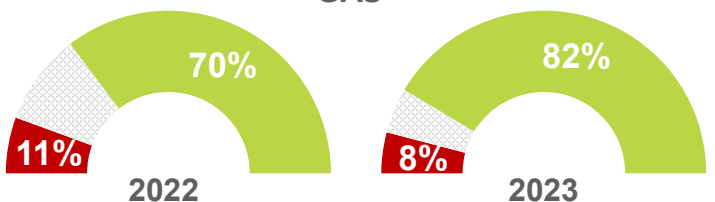
There has been a decrease in engagement from 56% of electricity and 54% of gas consumers reporting they read correspondence in the 2022 tracker.

Satisfaction with overall service

ELECTRICITY



GAS



■ Dissatisfied
 ■ Neither
 ■ Satisfied

SWITCHING



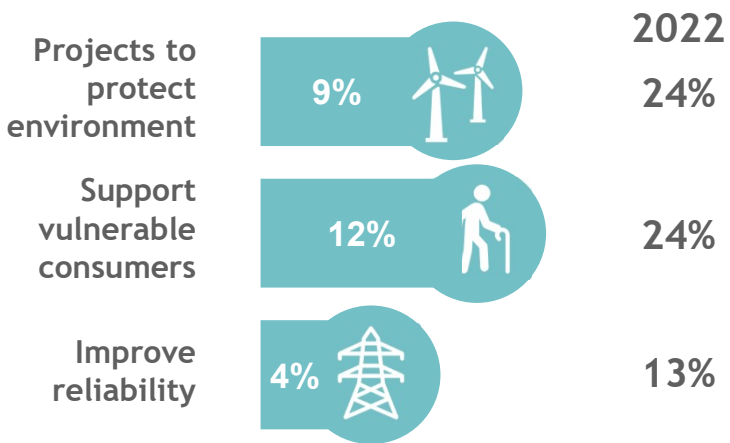
82% of consumers who did not have internet access had never switched electricity supplier

! 8% of domestic consumers use renewable energy systems or low carbon technologies in their home for heating or electricity

! Only 3% would consider switching to another energy source in the next 3 years

PAYING FOR FUTURE INVESTMENT

Willingness to pay extra on energy bills for future investment

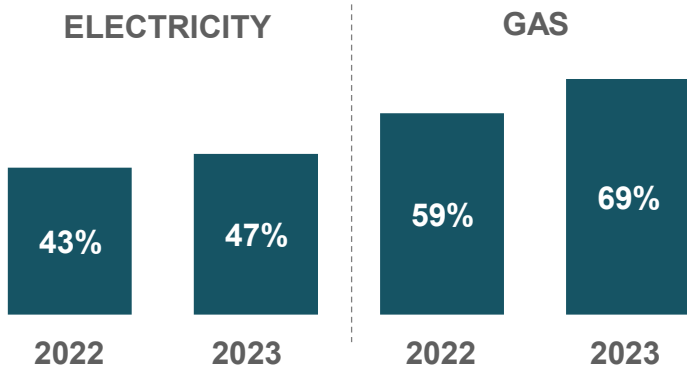


! 83% would be unwilling to pay anything extra on their bill for future investment...

! Compared to 63% in the 2022 Tracker who would be unwilling to pay extra.

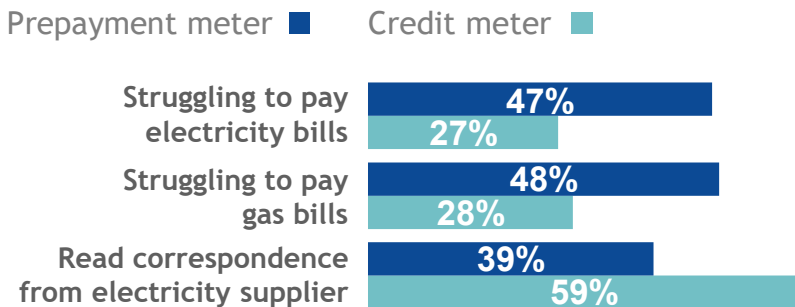
PREPAYMENT METERS

% who pay for energy with a prepayment meter

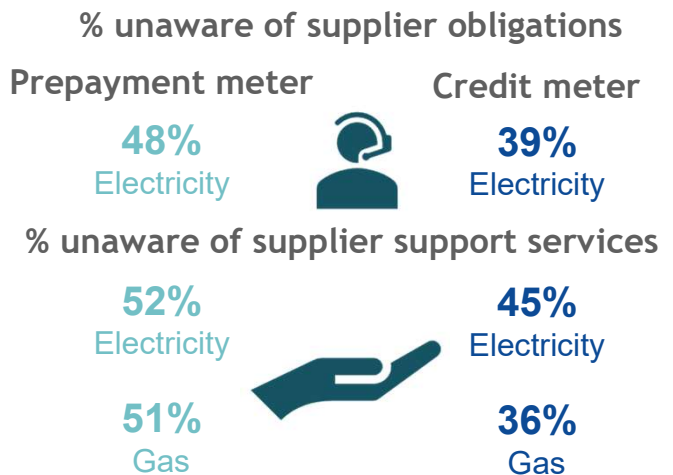


! The proportion of consumers with a prepayment meter for electricity and gas has increased since 2022.

! The majority of electricity (96%) and gas (97%) consumers who use a prepayment meter are content to remain using this method.



! 20% of electricity consumers ran out of money on their prepayment meter and went without electricity



Some totals may not sum to 100% due to rounding. Not sure and rather not say responses were not included. Only significant differences are reported. This study was conducted with 1502 domestic consumers during Oct and Nov 2023 by the independent research company:

