

ENERGY CONSUMER SENTIMENT SURVEY

Household topline results
December 2023

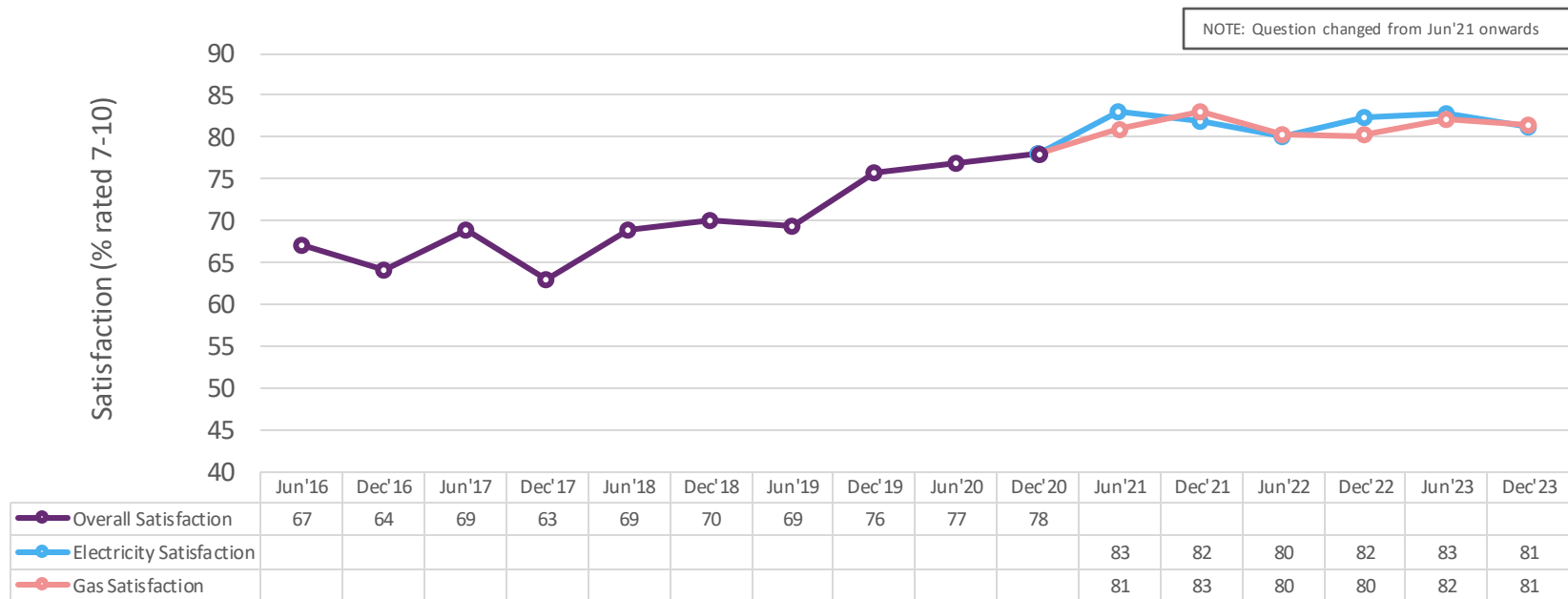


Satisfaction

- Although household satisfaction with electricity service has remained unchanged from last year (81%, 82% in December 2022), satisfaction with cost of electricity supply has decreased to 38% (42% in December 2022), the lowest on record.
- For households with a gas supply, satisfaction with the provision of their gas service has remained unchanged (81%, 80% in December 2022), however satisfaction with cost of gas has decreased from 48% to 41% over the year, another historical low.
- However, households with gas are more satisfied with the reliability of their gas service (87%, 81% last year) and the ease of accessing their account information (75%, 71% last year).



Satisfaction with retailer measures: Provision of electricity and gas services

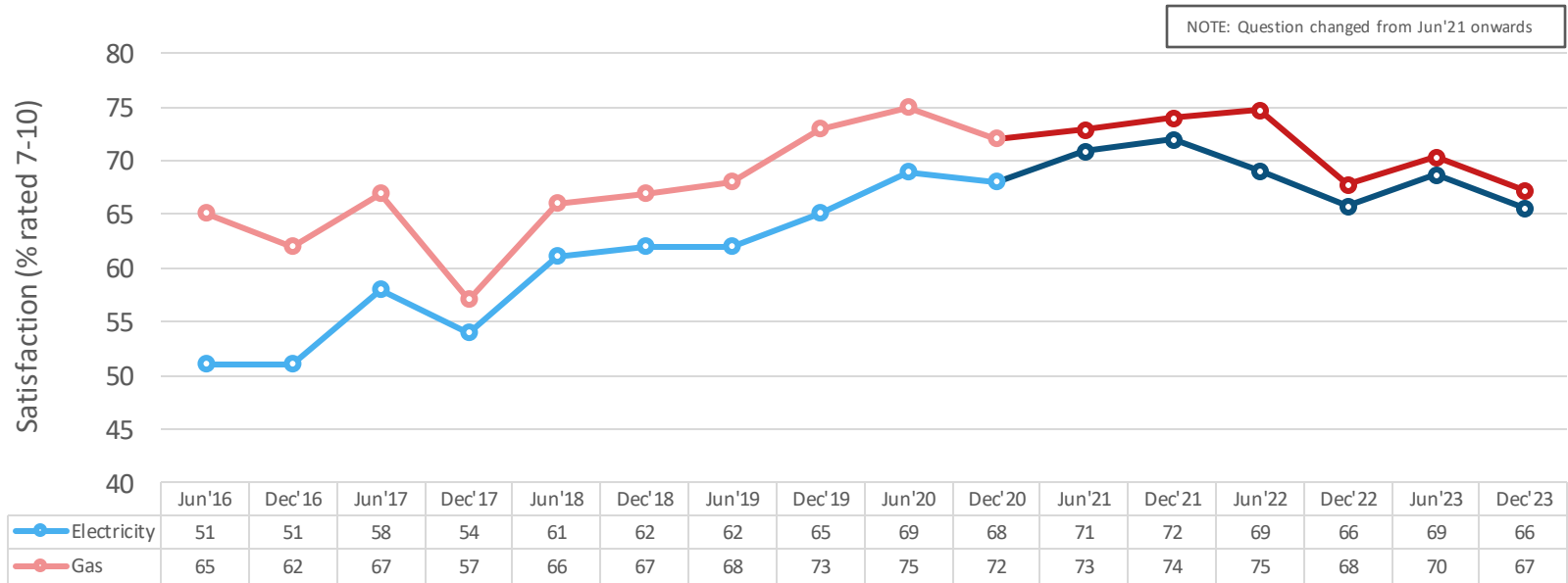


Q (Jun'16-Dec'20): How satisfied are you with the following? **The provision of your electricity and gas services overall over the last 6 months**, Base size: All households (min. n=2,000)

Q (from Jun'21): How satisfied are you with the following elements of your electricity service over the past 6 months? **The provision of your electricity services**, Base size: All households (min. n= 2,120)

Q (from Jun'21): How satisfied are you with the following elements of your gas service over the past 6 months? **The provision of your gas services**, Base size: All households with a mains gas supply (min. n= 1,095)

Satisfaction with retailer measures: Customer service



Q (Jun'16-Dec'20): How satisfied are you with the following? **The overall quality of customer service provided by your electricity company in the past 6 months**, Base size: All households (min. n=2,000)

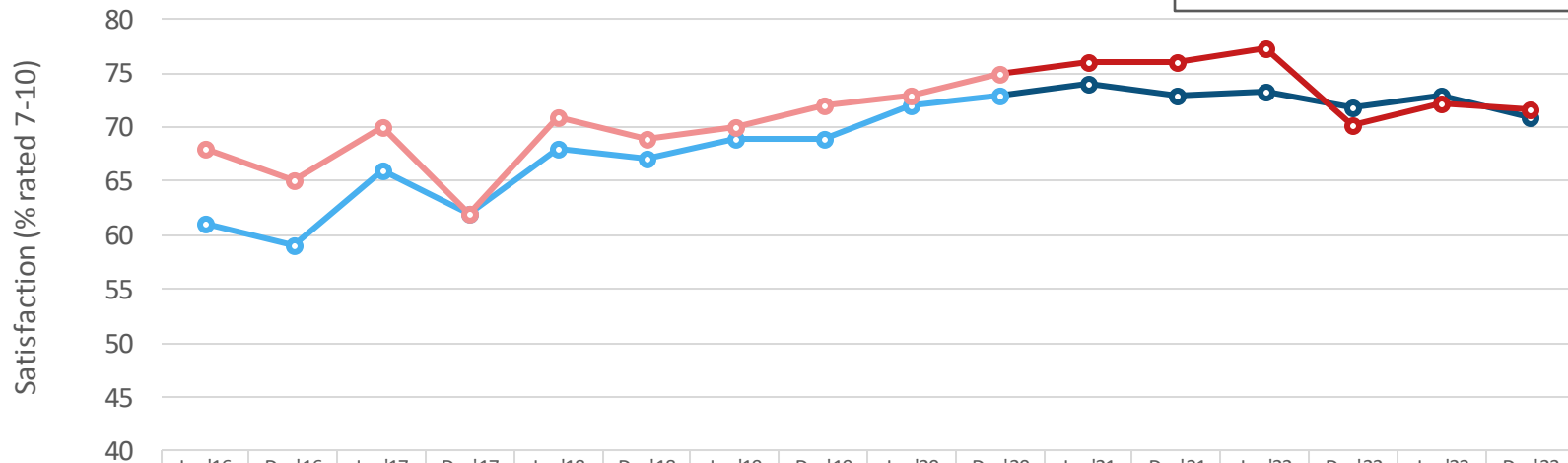
Q (from Jun'21): How satisfied are you with the following aspects of your electricity retailer in the past 6 months? **Overall customer service**, Base size: All households (min. n= 2,120)

Q (Jun'16-Dec'20): How satisfied are you with the following? **The overall quality of customer service provided by your gas company in the past 6 months**, Base size: All households with a mains gas supply (min. n=1,000)

Q (from Jun'21): How satisfied are you with the following aspects of your gas retailer in the past 6 months? **Overall customer service**, Base size: All households with a mains gas supply (min. n= 1,095)

Satisfaction with retailer measures: Billing

NOTE: Question changed from Jun'21 onwards



Electricity	61	59	66	62	68	67	69	69	72	73	74	73	73	72	73	71
Gas	68	65	70	62	71	69	70	72	73	75	76	76	77	70	72	72

Q (Jun'16-Dec'20): How satisfied are you with the following? **The billing and account options (such as the option of monthly billing, online accounts etc.) currently available to you from your electricity supplier**, Base size: All households (min. n=2,000)

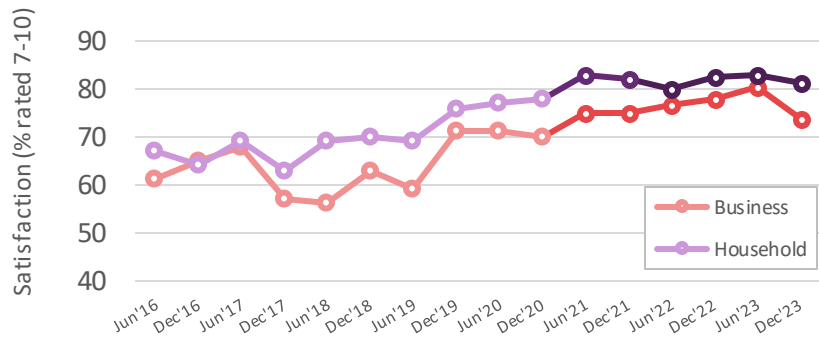
Q (from Jun'21): How satisfied are you with the following aspects of your electricity retailer in the past 6 months? **Billing and usage information is clear and simple to understand**, Base size: All households (min. n=2,120)

Q (Jun'16-Dec'20): How satisfied are you with the following? **The billing and account options (such as the option of monthly billing, online accounts etc.) currently available to you from your gas supplier**, Base size: All households with a mains gas supply (min. n=1,000)

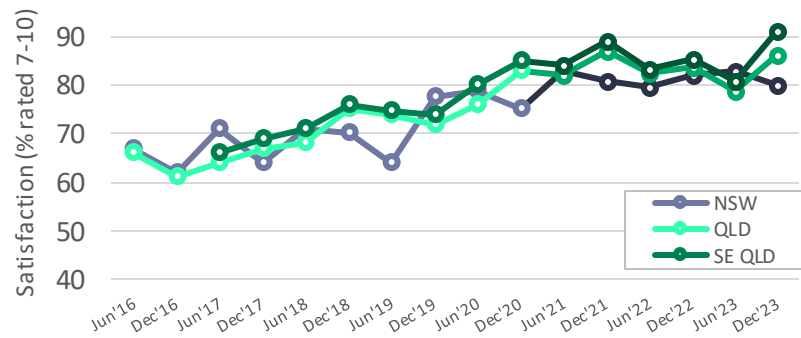
Q (from Jun'21): How satisfied are you with the following aspects of your gas retailer in the past 6 months? **Billing and usage information is clear and simple to understand**, Base size: All households with a mains gas supply (min. n= 1,095)

Overall satisfaction with electricity services

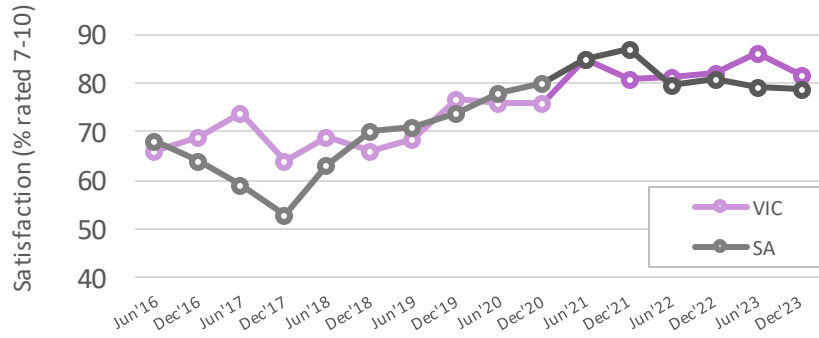
Overall Satisfaction - Business & Household



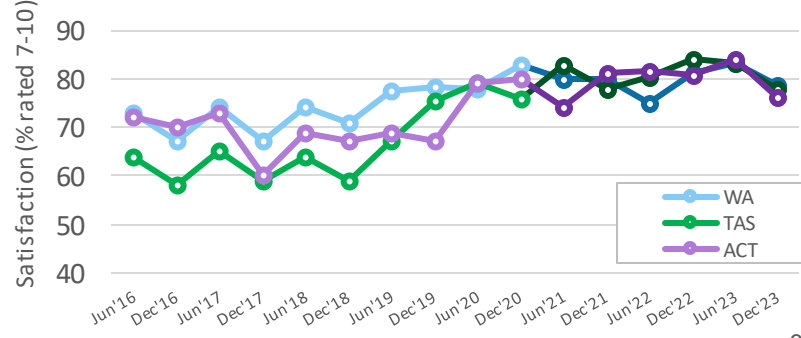
Overall Satisfaction - NSW, QLD & SE QLD



Overall Satisfaction - VIC & SA



Overall Satisfaction - WA, TAS & ACT

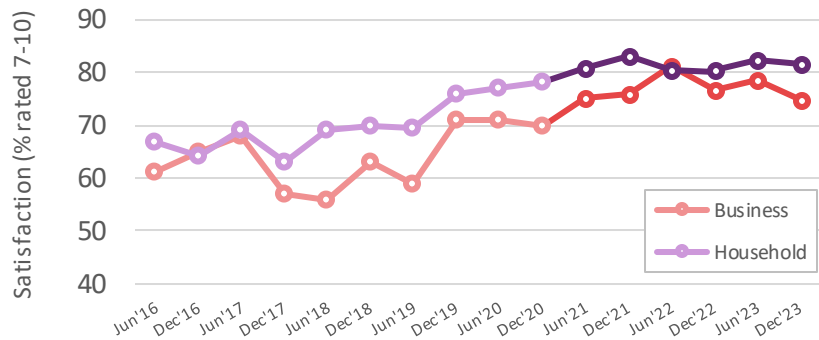


Q (Jun'16-Dec'20): How satisfied are you with the following? **The provision of your electricity and gas services overall over the last 6 months**, Base size: All households (min. n=2,000)

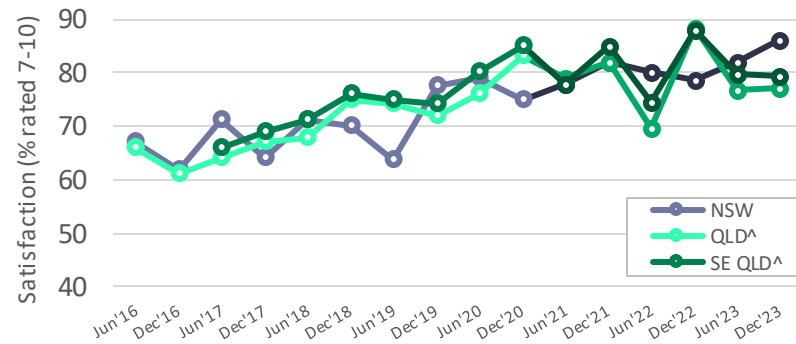
Q (from Jun'21): How satisfied are you with the following elements of your electricity service over the past 6 months? **The provision of your electricity services**, Base size: All households (min. n= 2,120)

Overall satisfaction with gas services

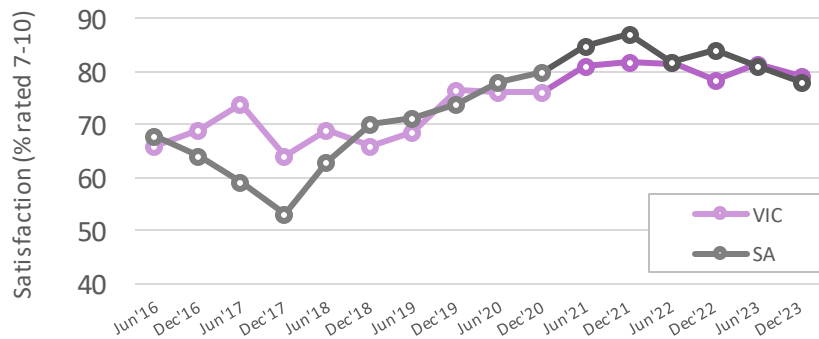
Overall Satisfaction - Business & Household



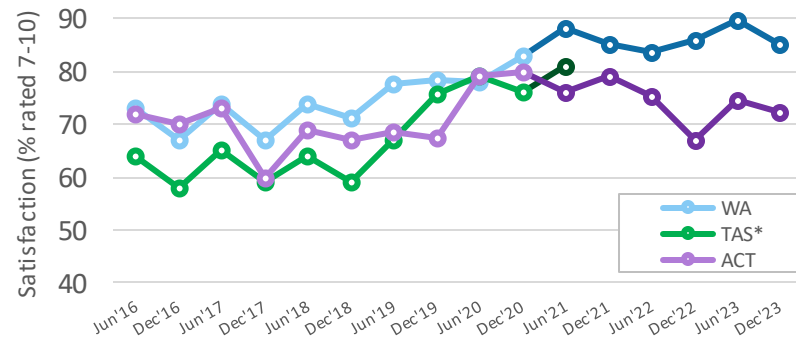
Overall Satisfaction - NSW, QLD^ & SE QLD^



Overall Satisfaction - VIC & SA



Overall Satisfaction - WA, TAS* & ACT

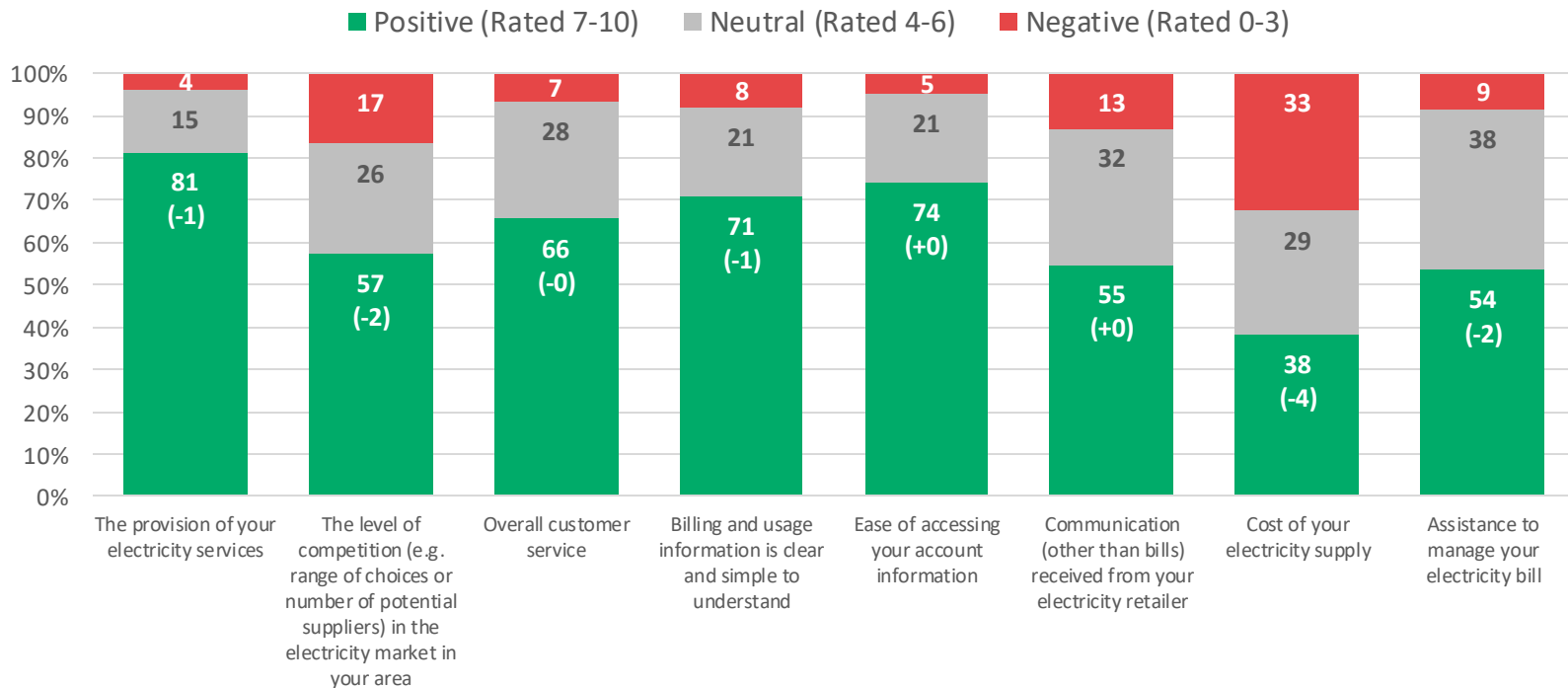


Q (Jun'16-Dec'20): How satisfied are you with the following? **The provision of your electricity and gas services overall over the last 6 months**, Base size: All households (min. n=2,000)

Q (from Jun'21): How satisfied are you with the following elements of your gas service over the past 6 months? **The provision of your gas services**, Base size: All households with a mains gas supply (min. n=1,095)

^Caution small sample size for QLD & SE QLD. *Results not shown for TAS Dec'21, Jun'22, Dec'22 & Jun'23 due to extremely small sample size (n<30).

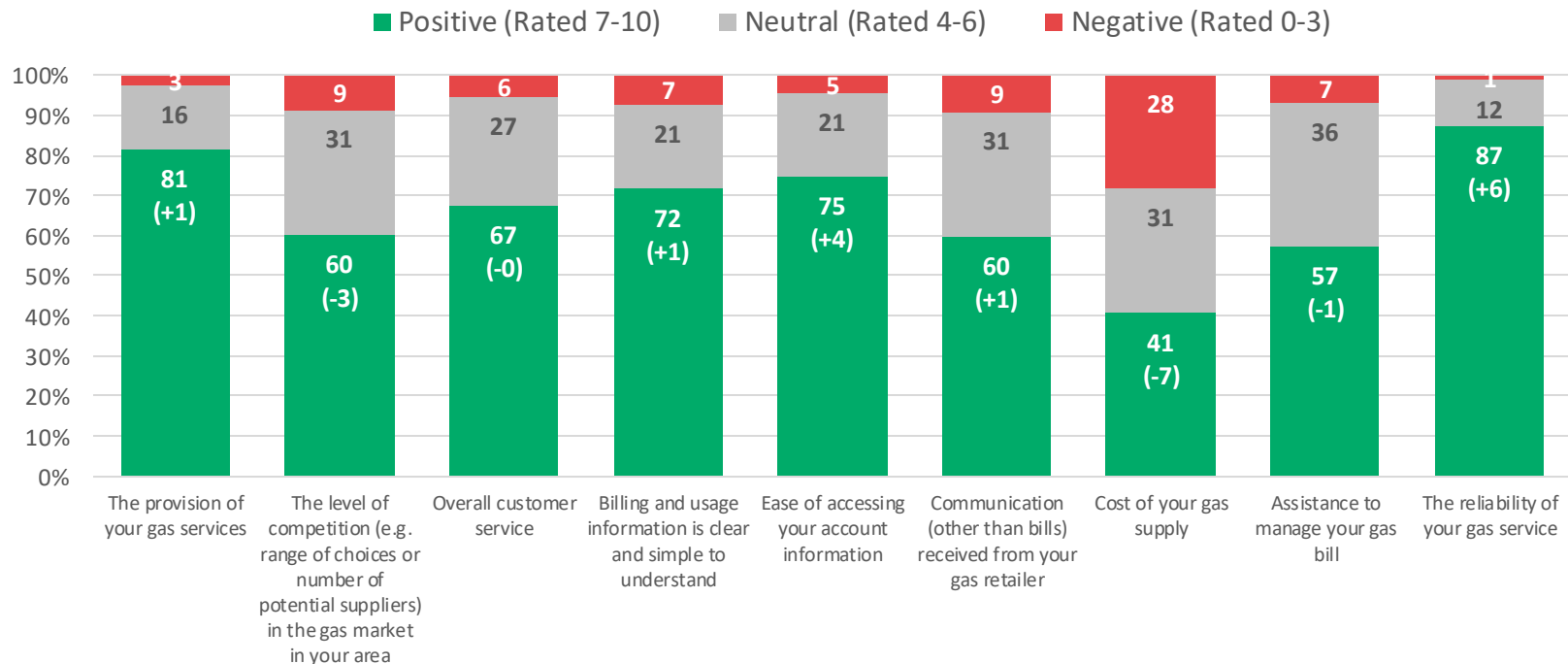
Satisfaction with retailer measures: Electricity



Q (Jun'16-Dec'20): How satisfied are you with the following? Base size: All households (min. n=2,000)

Q (from Jun'21): How satisfied are you with the following elements of your electricity service over the past 6 months? Base size: All households (min. n=2,120)

Satisfaction with retailer measures: Gas

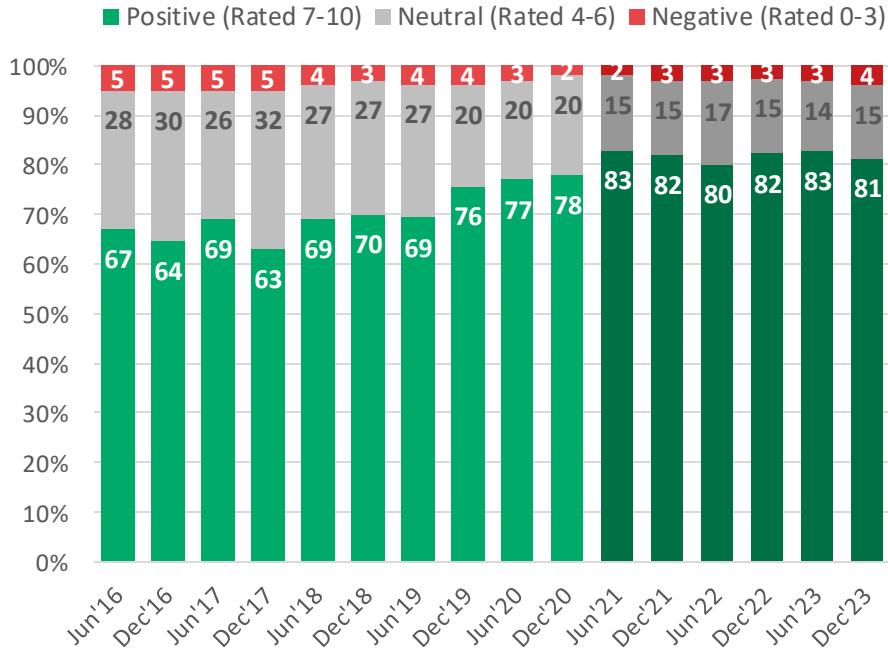


Q (Jun'16-Dec'20): How satisfied are you with the following? Base size: All households with a mains gas supply (min. n=1,000)

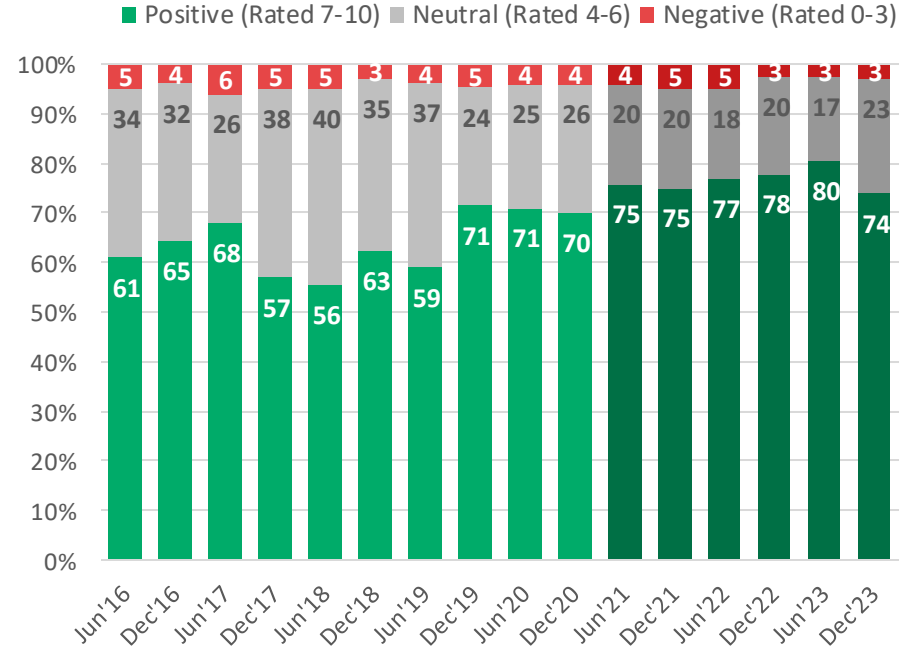
Q (from Jun'21): How satisfied are you with the following elements of your gas service over the past 6 months? Base size: All households with a mains gas supply (min. n=1,095)

Overall satisfaction with electricity services (Business/Household)

Overall Satisfaction - Household



Overall Satisfaction - Business



Q (Jun'16-Dec'20): How satisfied are you with the following? **The provision of your electricity and gas services overall over the last 6 months**, Base size: All households (min. n=2,000)

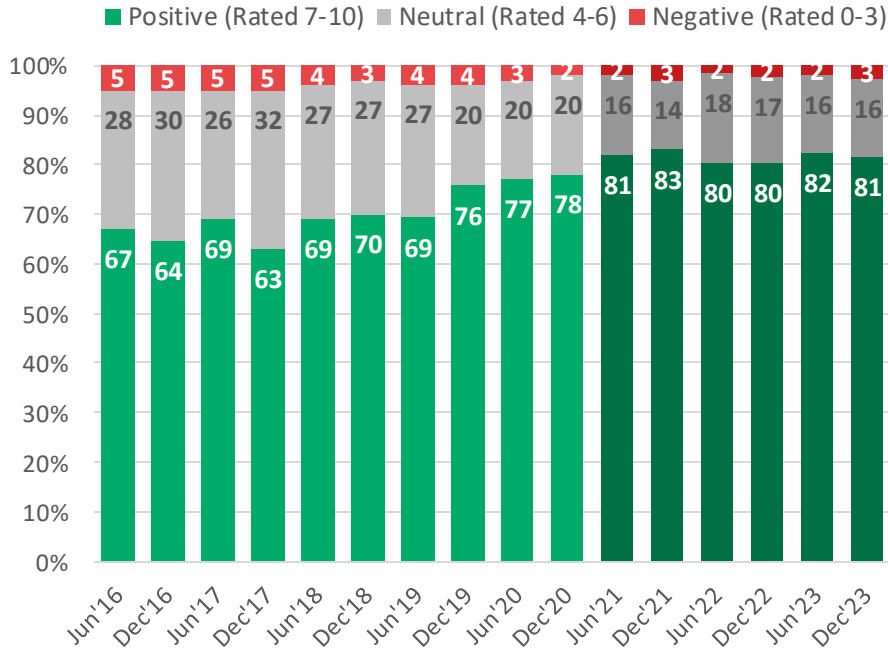
Q (from Jun'21): How satisfied are you with the following elements of your electricity service over the past 6 months? **The provision of your electricity services**, Base size: All households (min. n=2,120)

Q (Jun'16-Dec'20): How satisfied are you with the following? **The provision of your electricity and gas services overall over the last 6 months**, Base size: All businesses (min. n=280)

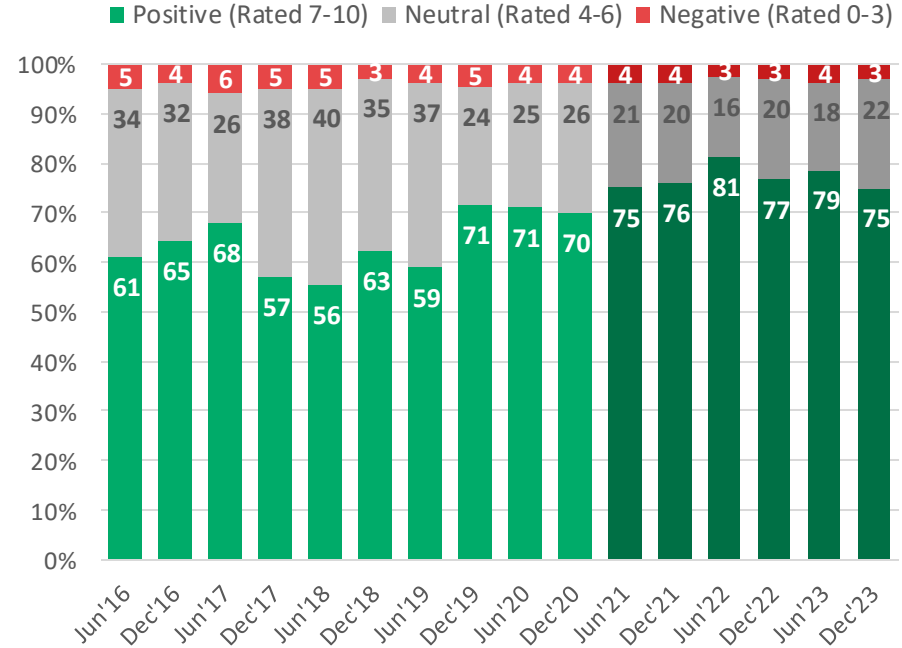
Q (from Jun'21): How satisfied are you with the following elements of your electricity service over the past 6 months? **The provision of your electricity services**, Base size: All businesses (min. n=500)

Overall satisfaction with gas services (Business/Household)

Overall Satisfaction - Household



Overall Satisfaction - Business



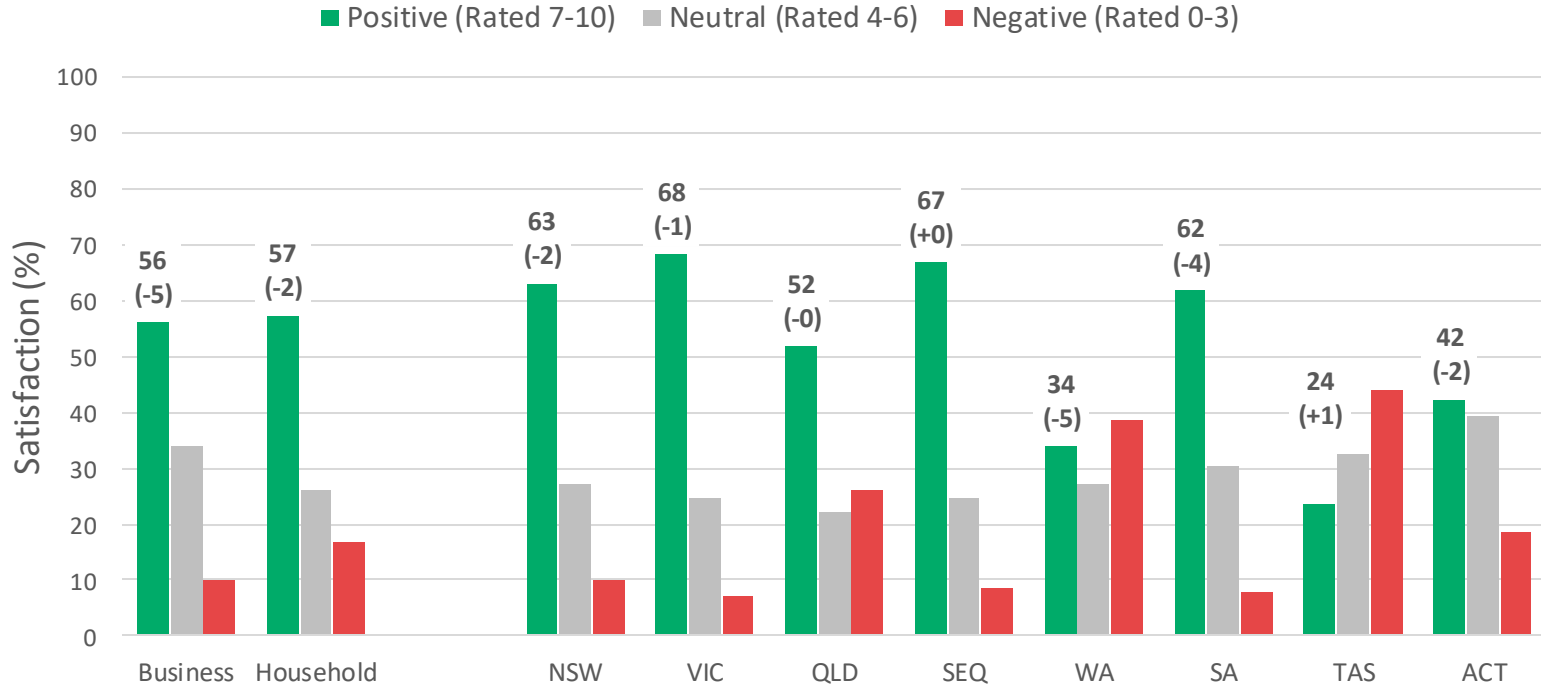
Q (Jun'16-Dec'20): How satisfied are you with the following? **The provision of your electricity and gas services overall over the last 6 months**, Base size: All households (min. n=2,000)

Q (from Jun'21): How satisfied are you with the following elements of your gas service over the past 6 months? **The provision of your gas services**, Base size: All households with a mains gas supply (min. n= 1,095)

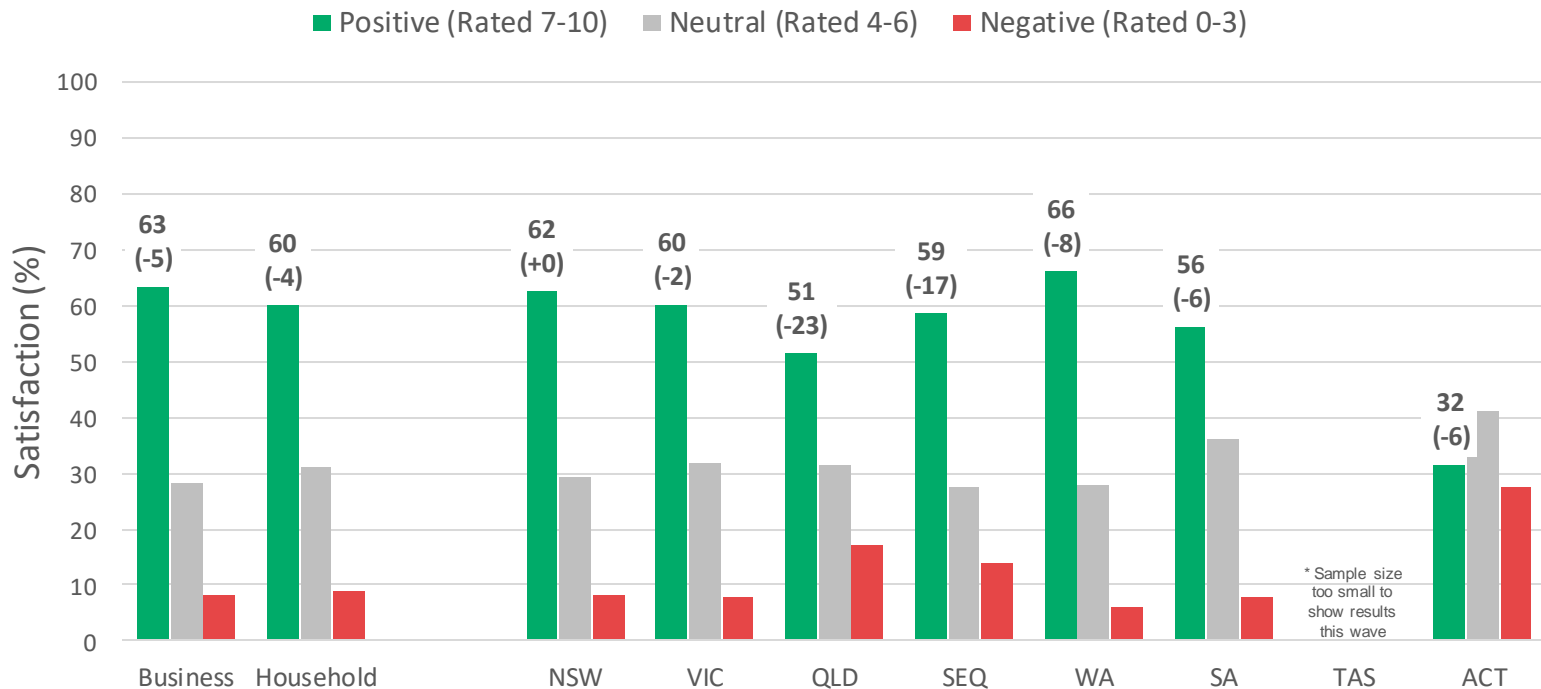
Q (Jun'16-Dec'20): How satisfied are you with the following? **The provision of your electricity and gas services overall over the last 6 months**, Base size: All businesses (min. n=280)

Q (from Jun'21): How satisfied are you with the following elements of your gas service over the past 6 months? **The provision of your gas services**, Base size: All businesses with a mains gas supply (min. n=242)

Satisfaction with level of competition: Electricity



Satisfaction with level of competition: Gas

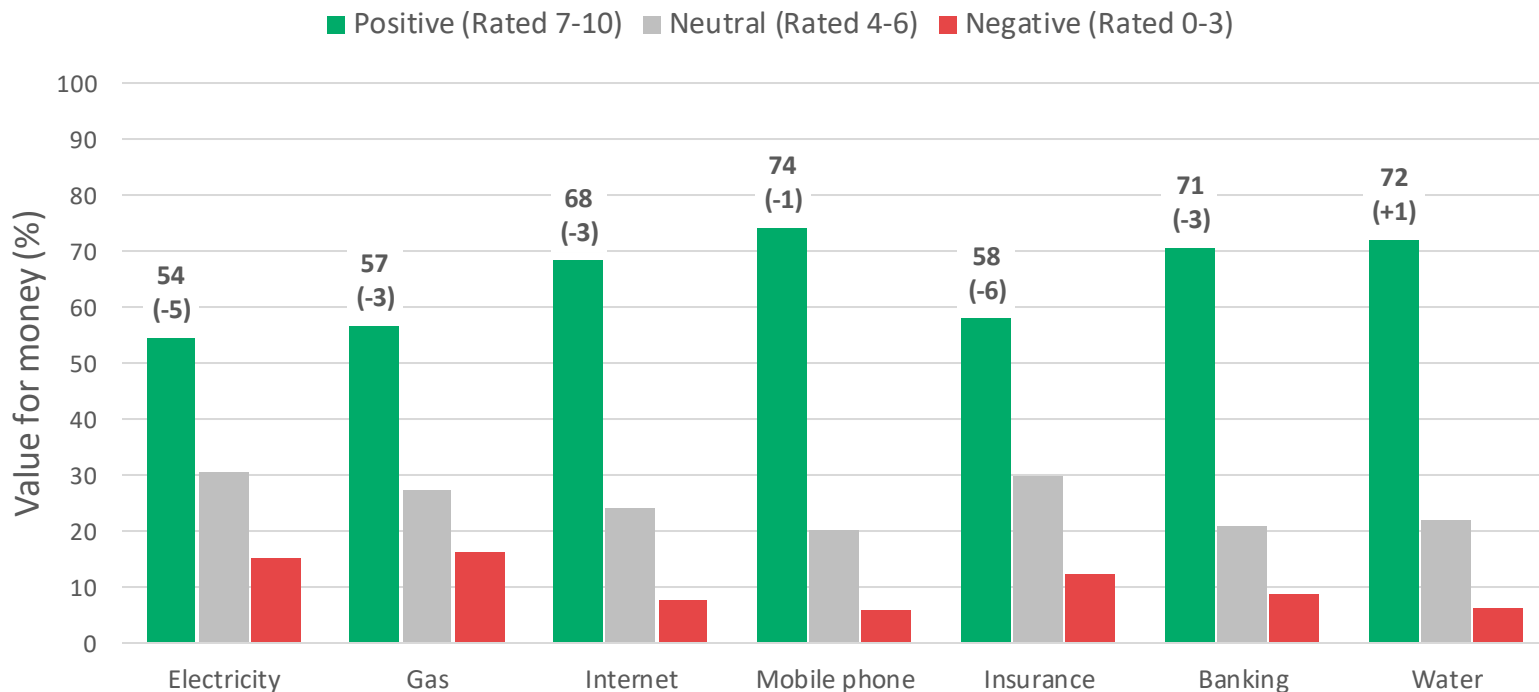


Value for money & Outages

- Perceived value for money of electricity and gas continues to fall from the December 2021 peak. Positive rating for the value for money of electricity is now at 54% (down from 59% last year) and gas is now at 57% (down from 60% last year).
- 30% of households experienced an electricity outage in the last 6 months. This is consistent with December 2022 (28%).
- Among households who experienced an electrical outage, 46% are positive about the frequency of the outages and the majority are positive about the time it took to restore power (57%, up from 53% last year).



Value for money of all services (Household)



Q: How would you rate the overall value for money of the products and services provided by your electricity company in the past 6 months?

Base size: All households (min n=2,120)

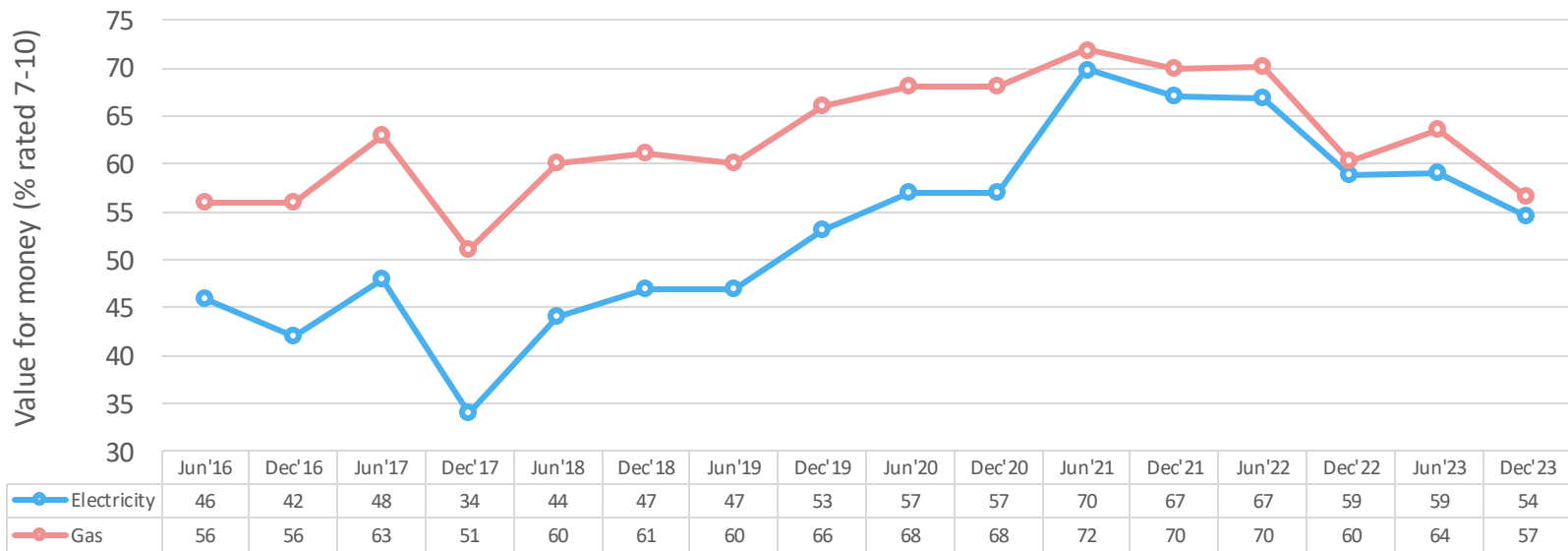
Q: How would you rate the overall value for money of the products and services provided by your gas retailer in the past 6 months?

Base size: All households with a mains gas supply (min n=1,095)

Q: How would you rate the overall value for money by your service provider in the following areas, in the past 6 months?

Base size: All households (min n=2,000)

Value for money



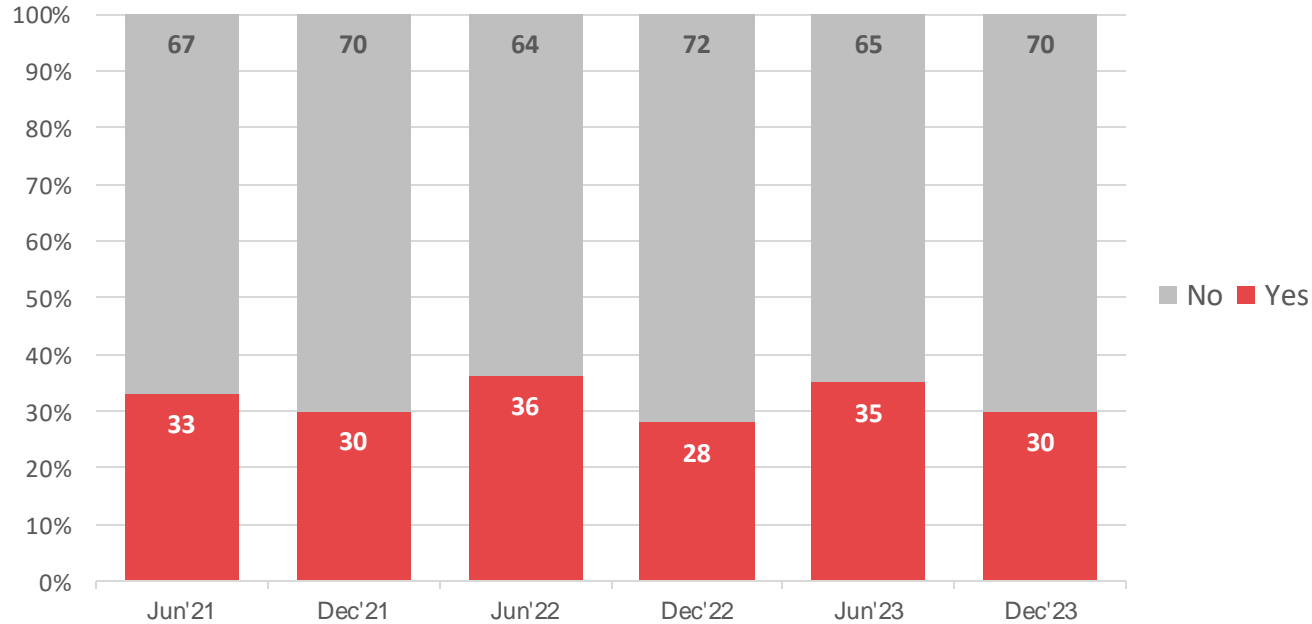
Q: How would you rate the overall value for money of the products and services provided by your electricity company in the past 6 months?

Base size: All households (min. n=2,000)

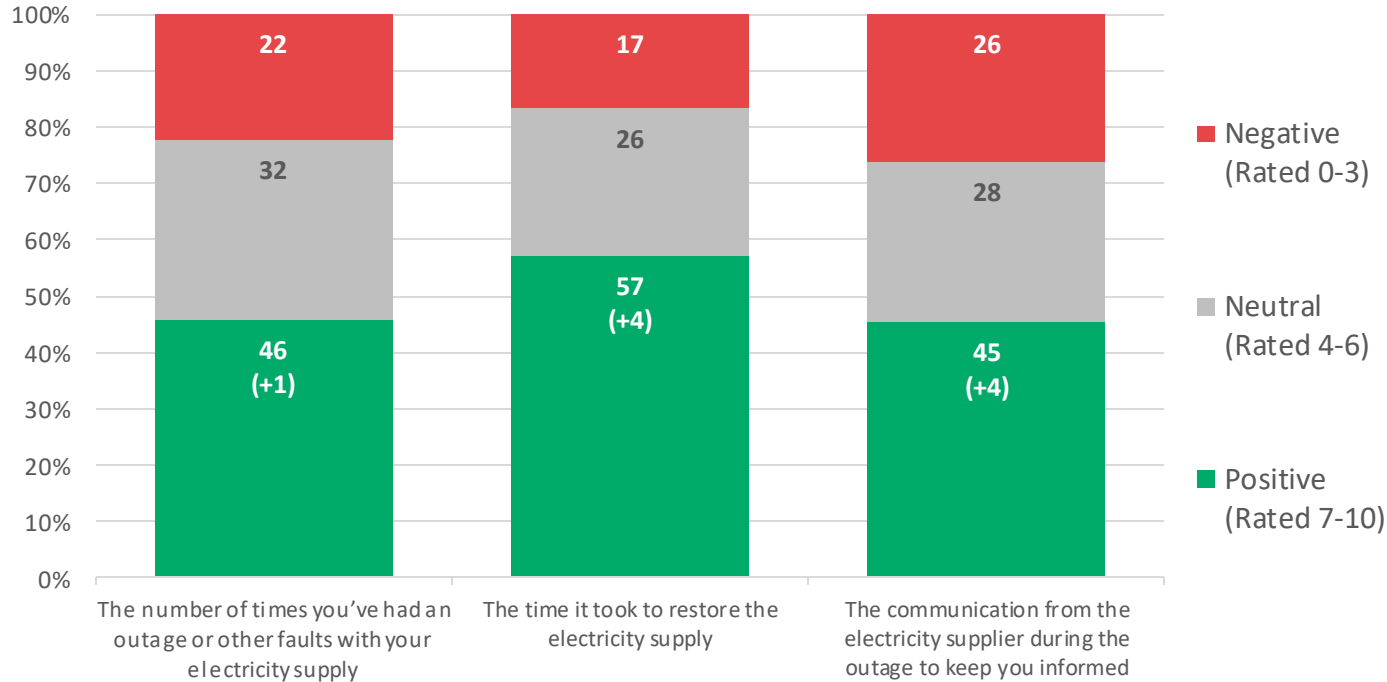
Q: How would you rate the overall value for money of the products and services provided by your gas retailer in the past 6 months?

Base size: All households with a mains gas supply (min. n=1,000)

Experienced electricity outages in last 6 months



Satisfaction with electricity outages



Q: How satisfied are you with the following aspects of response from your electricity supplier when you have experienced an outage in the past 6 months?

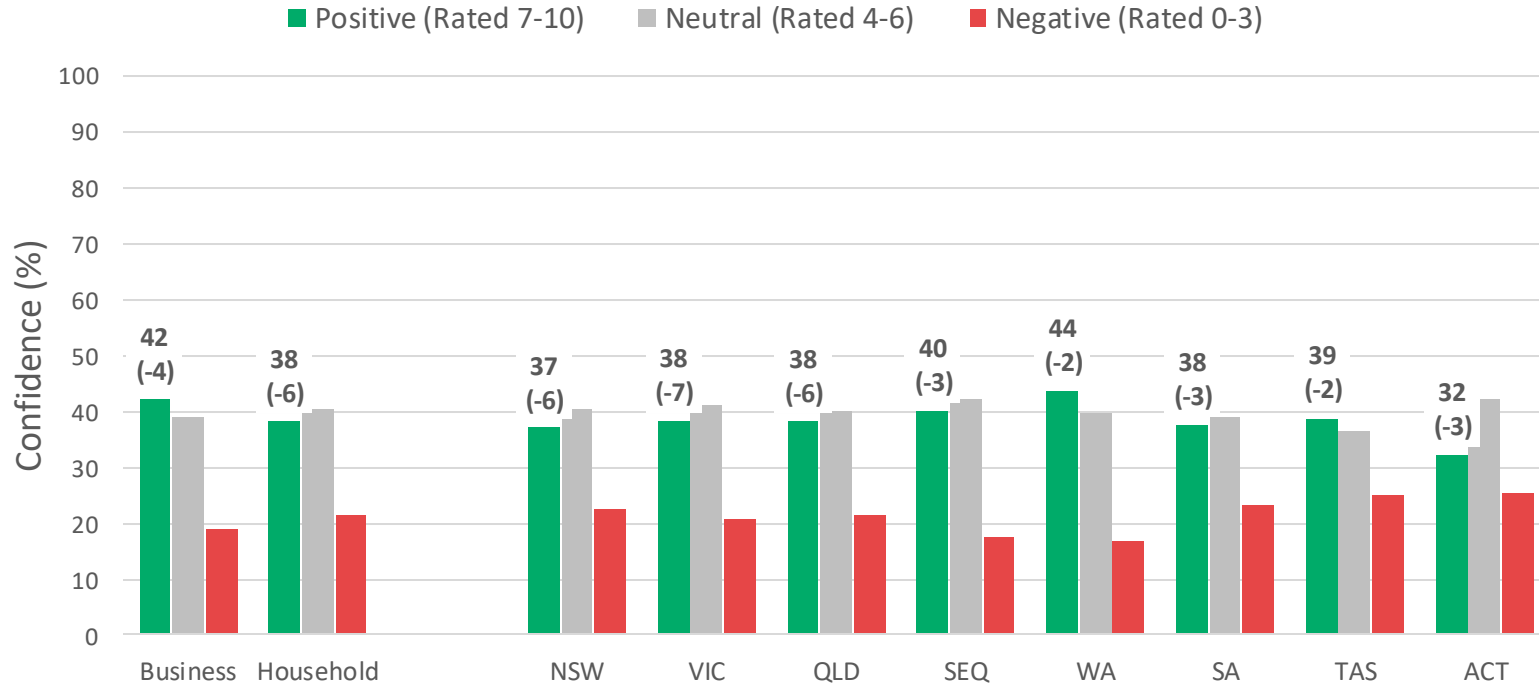
Base size: All households who have experienced an outage in the last 6 months (min n=676)

Household confidence

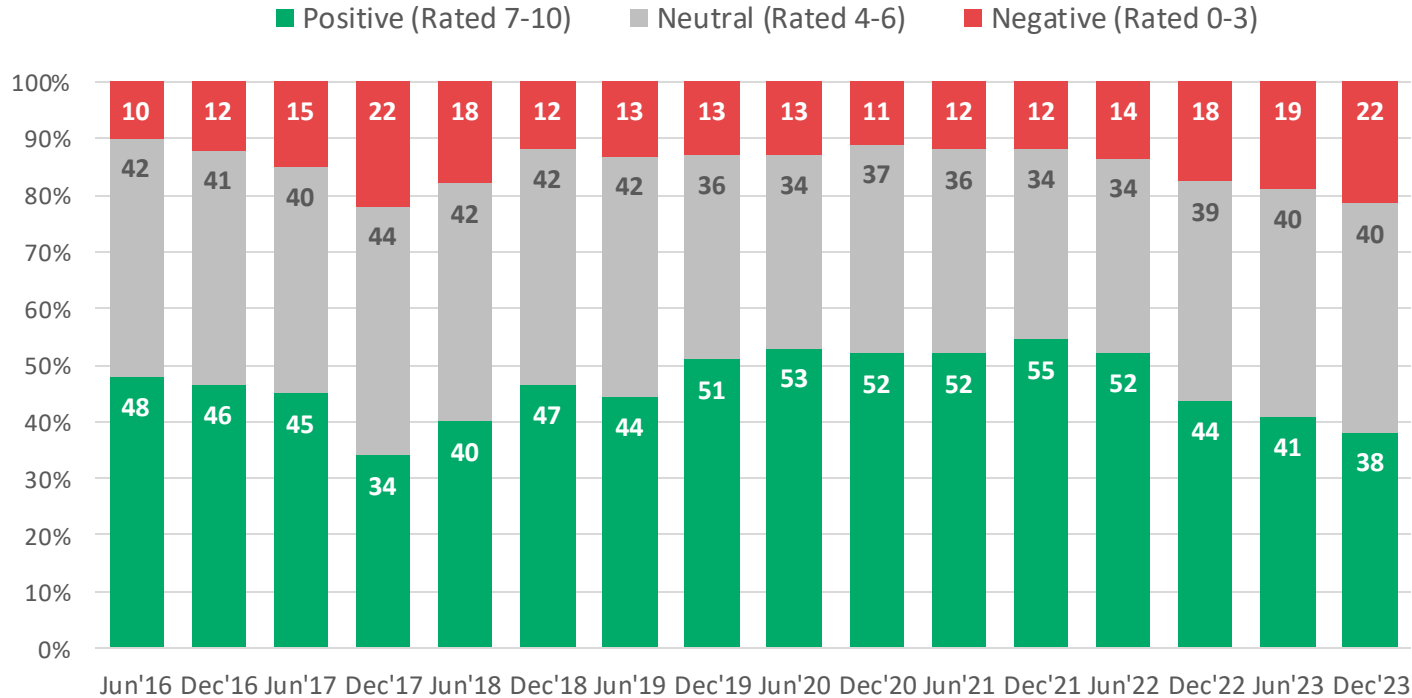
- Household confidence in future outcomes has continued to decrease over the past year, with confidence in advances in technology now at 38% (down 6% points), and confidence in future reliability now at 41% (down 4% points). These are the lowest results for these measures since December 2017.
- Similarly, confidence that the market is working in households' long-term interests is now at 31% (down 4% points), the lowest it has been since December 2018.
- Households retain confidence in the availability of information, their ability to make choices about energy products and services and having tools and assistance to manage energy use and costs.



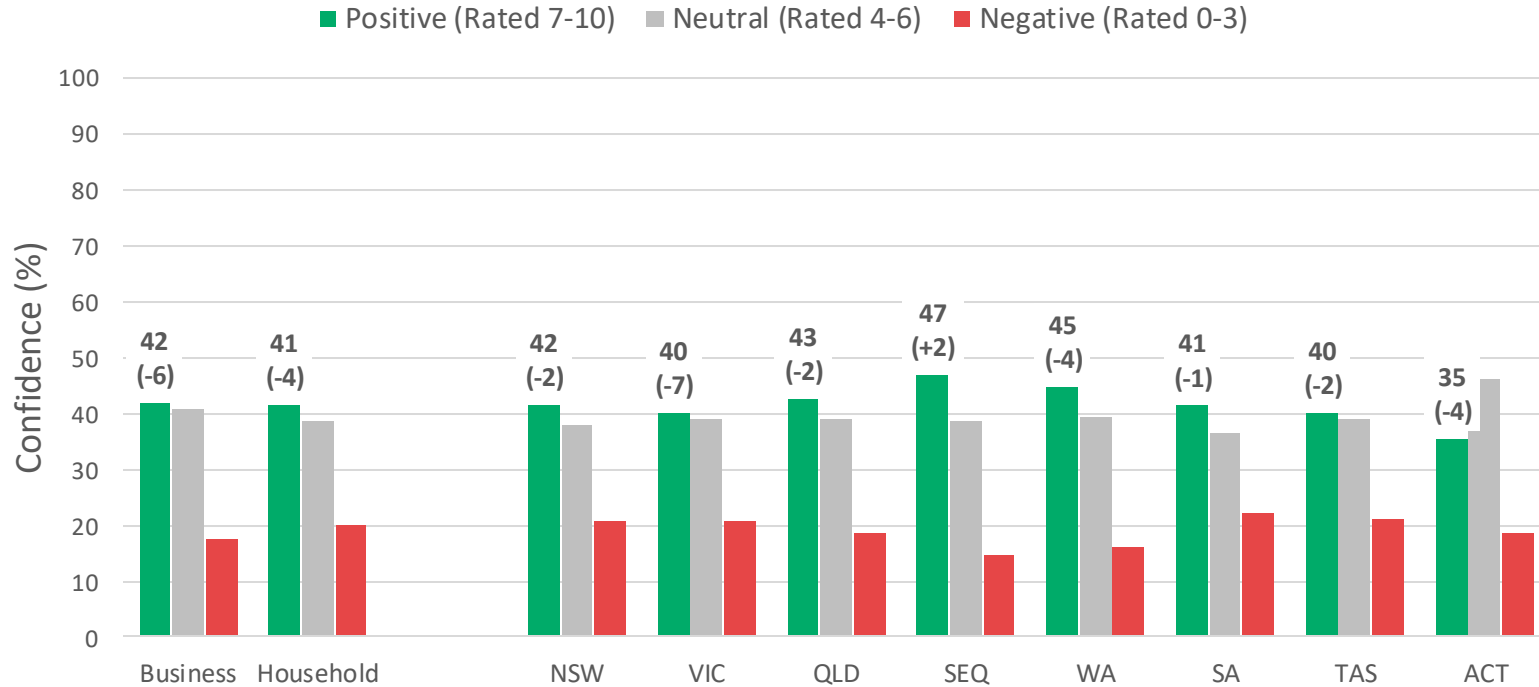
Confidence in advances in technology



Confidence in advances in technology



Confidence in future reliability

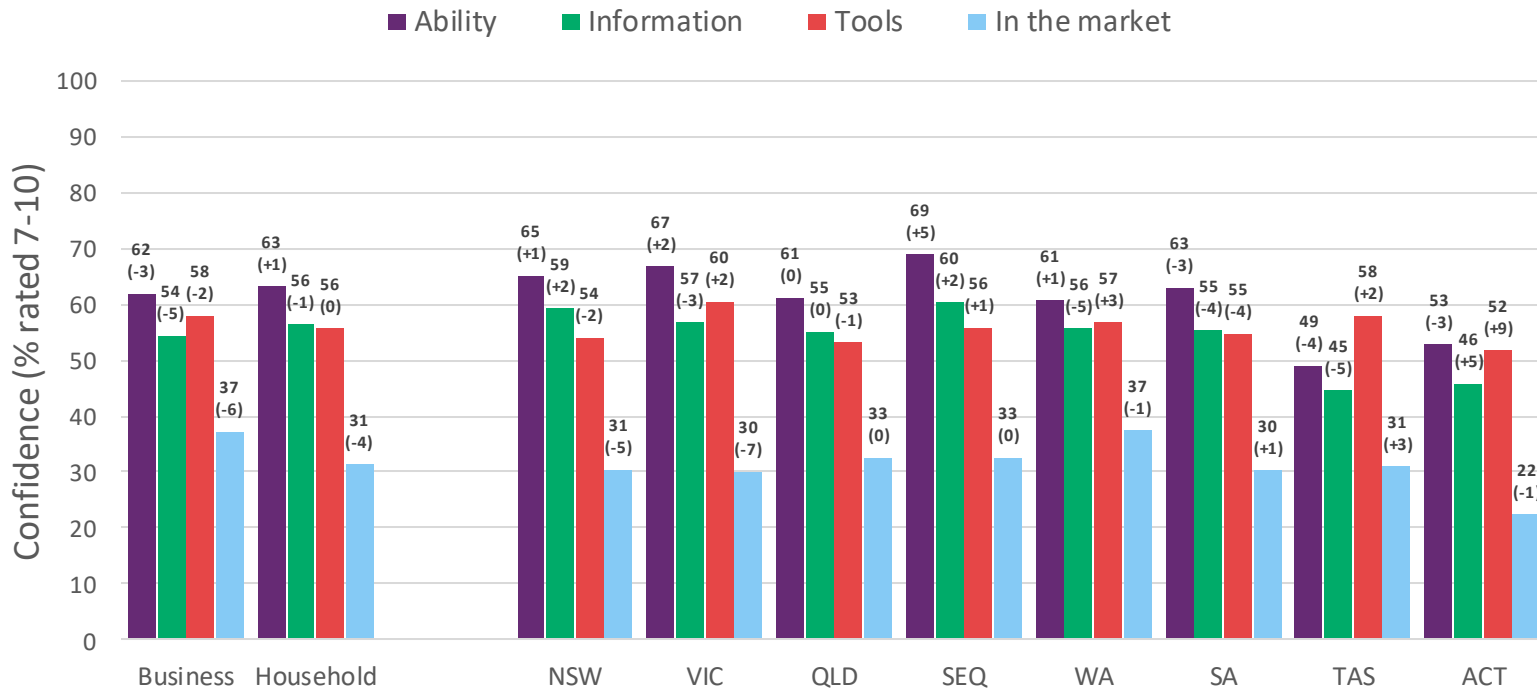


Q: Thinking about the overall market outcomes, how confident are you that the energy market will provide better outcomes for you in 5 years, in terms of...? **Provide a more reliable supply**

Base size: All households (min n=2,120)

Base size: All businesses (min n=500)

Confidence in ability, information and tools



Q: How confident do you feel in the following...?

Your ability to make choices about energy products and services, such as which plan or supplier to choose

That there is enough easily understood information available to you to make decisions about energy products and services, by which we mean information available on the internet, through energy comparison websites or elsewhere

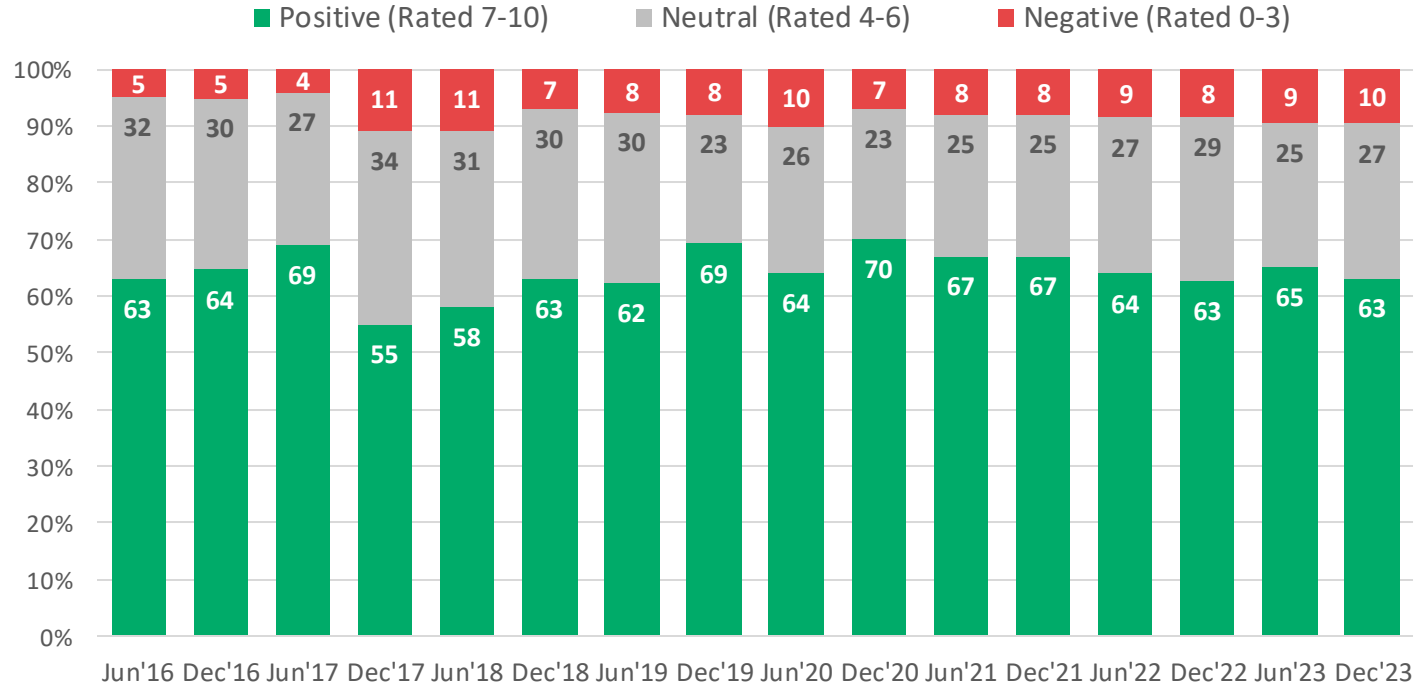
That you have the tools and assistance you need to manage your energy use and costs, by which we mean electricity meters, smart phone devices, apps or other tools

Q: How confident are you that the overall market is working in your long-term interests? By 'the market' we mean, the energy industry and energy regulators

Base size: All households (min n=2,120)

Base size: All businesses (min n=500)

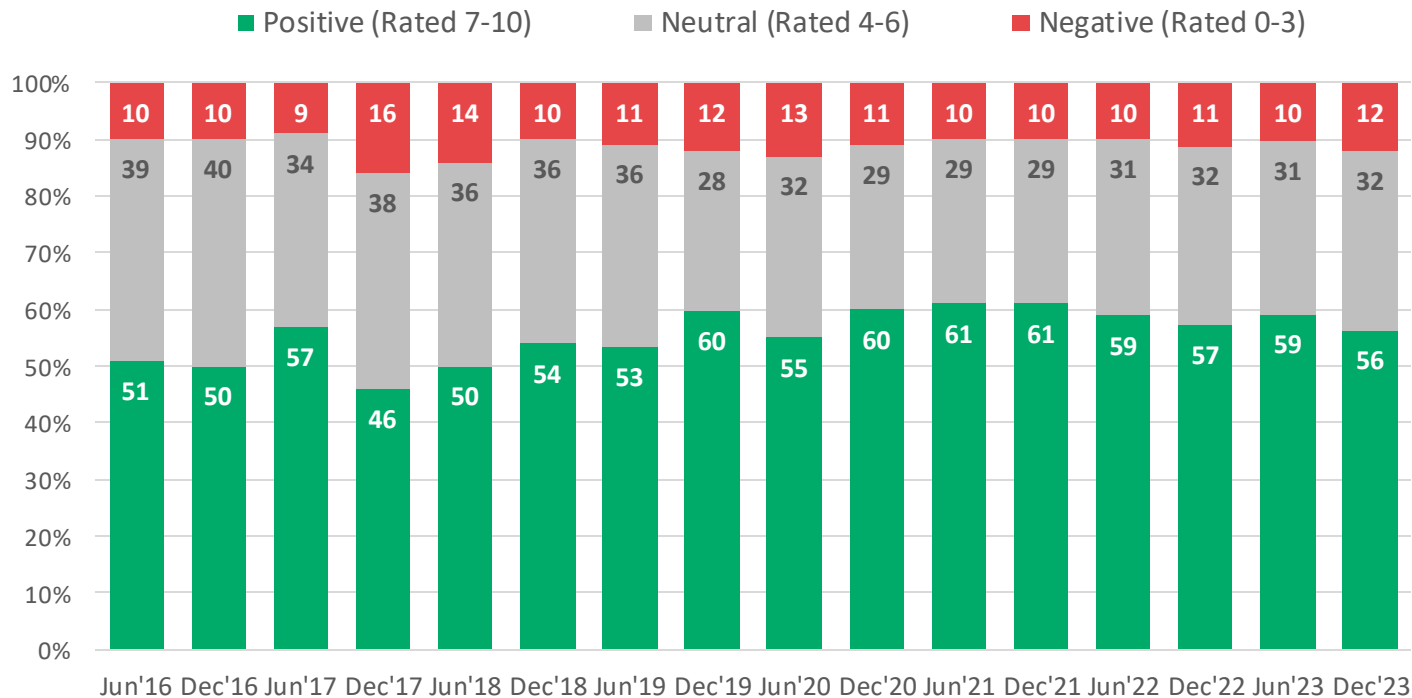
Confidence in ability to make choices



Q: How confident do you feel in the following...? **Your ability to make choices about energy products and services, such as which plan or supplier to choose**

Base size: All households (min. n= 2,000)

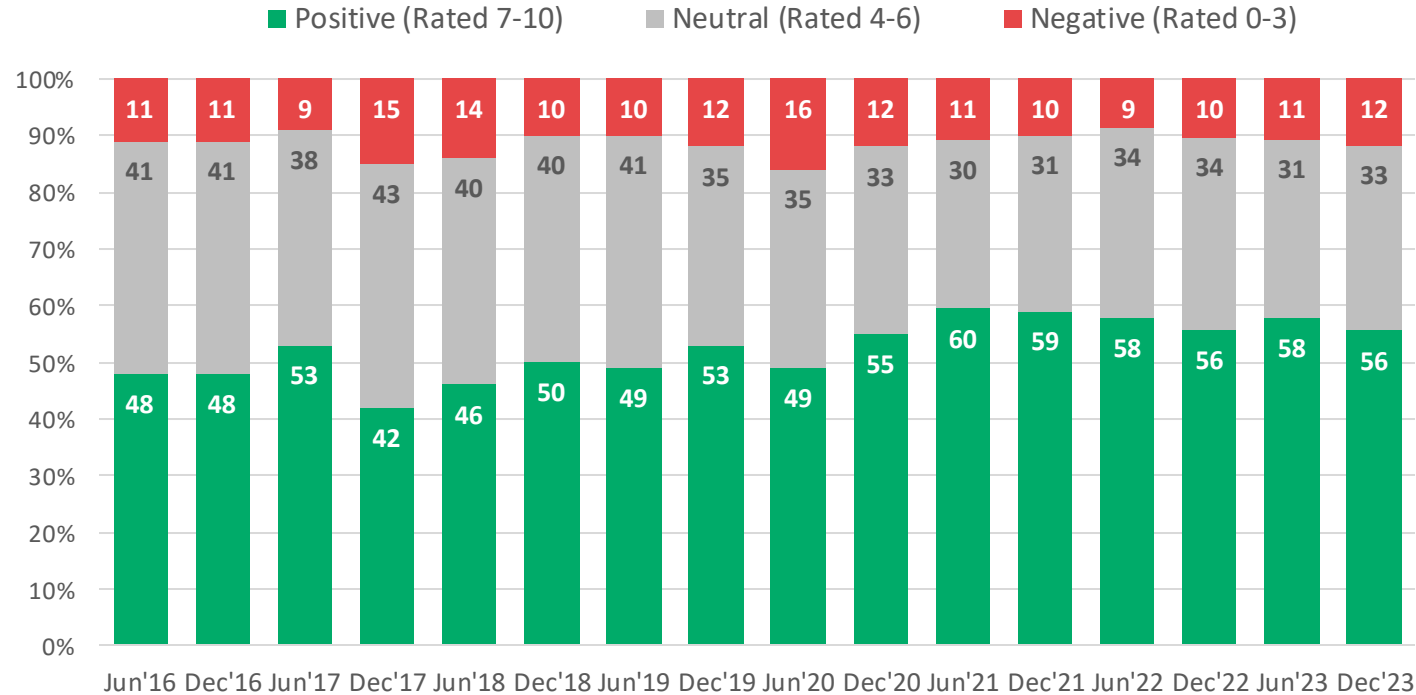
Confidence in availability of enough easily understood information



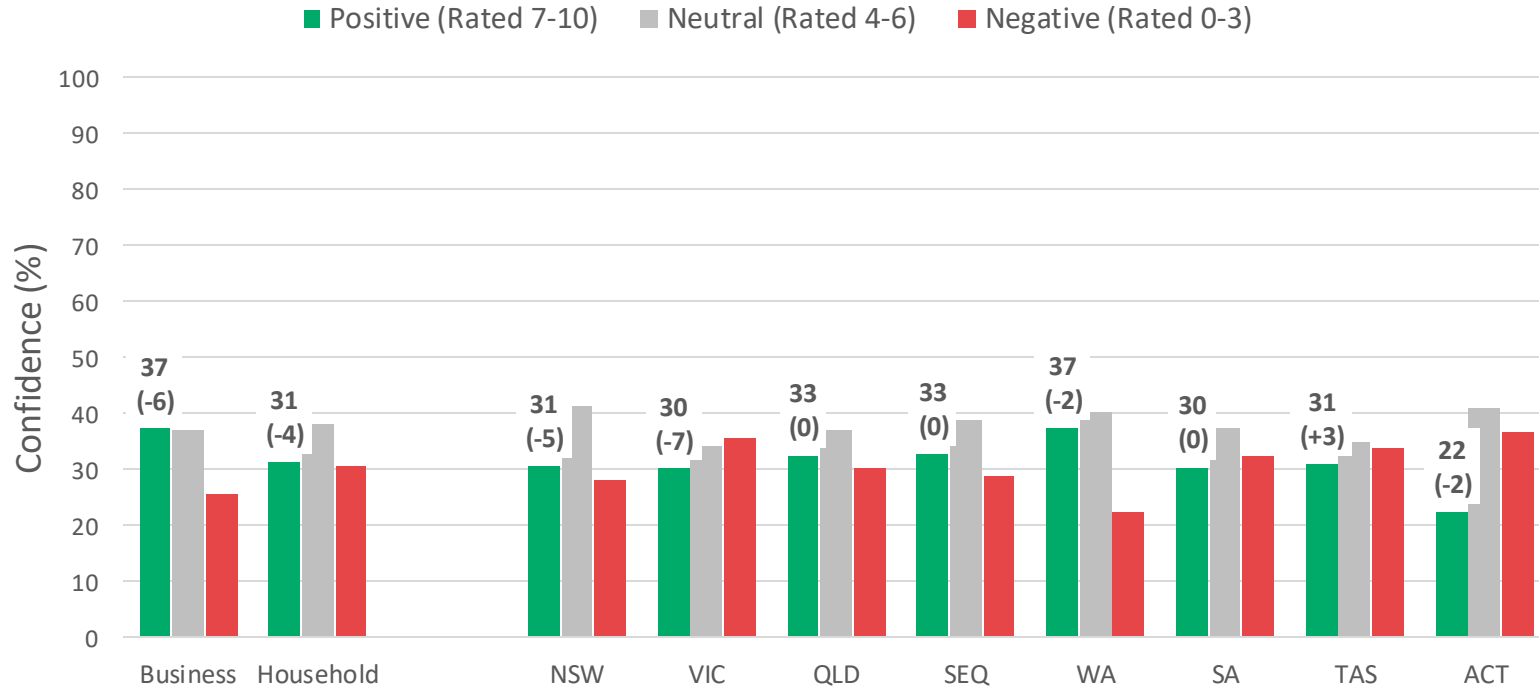
Q: How confident do you feel in the following...? **That there is enough easily understood information available to you to make decisions about energy products and services, by which we mean information available on the internet, through energy comparison websites or elsewhere**

Base size: All households (min. n= 2,000)

Confidence in availability of tools



Confidence in the market

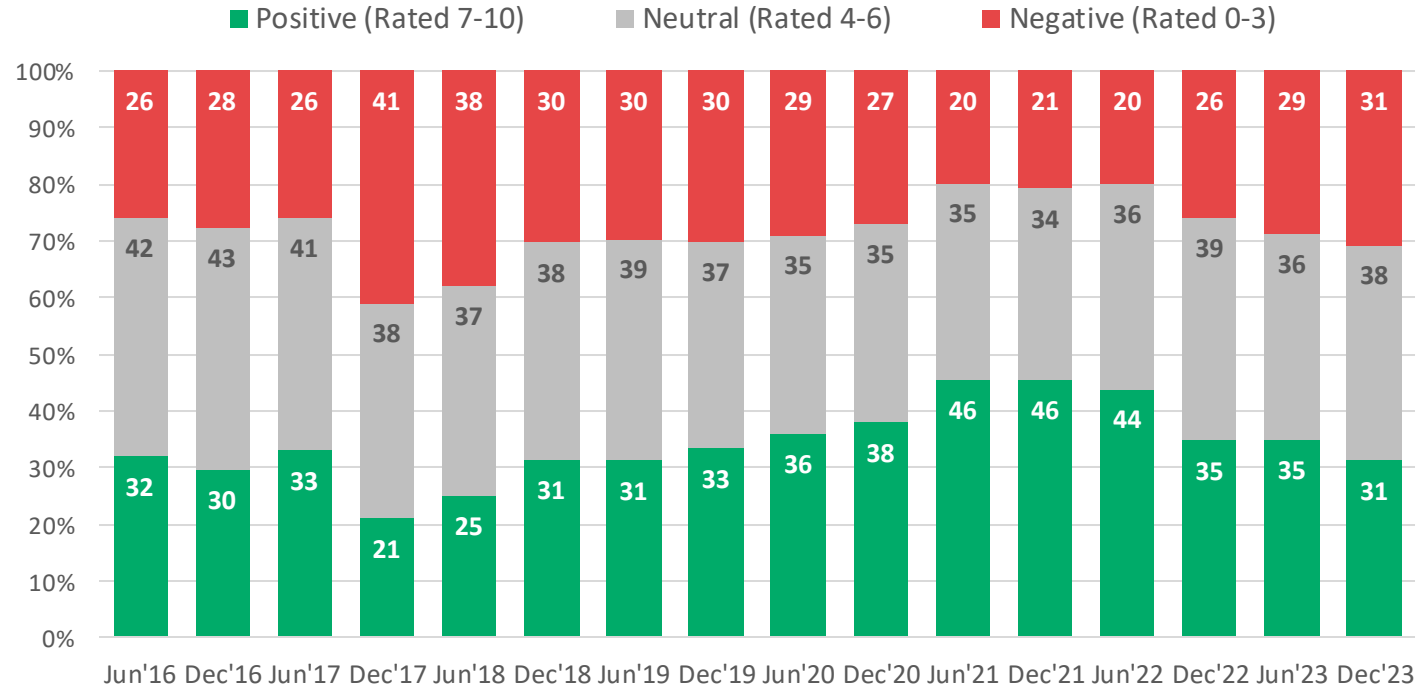


Q: How confident are you that the overall market is working in your long-term interests? By 'the market' we mean, the energy industry and energy regulators.

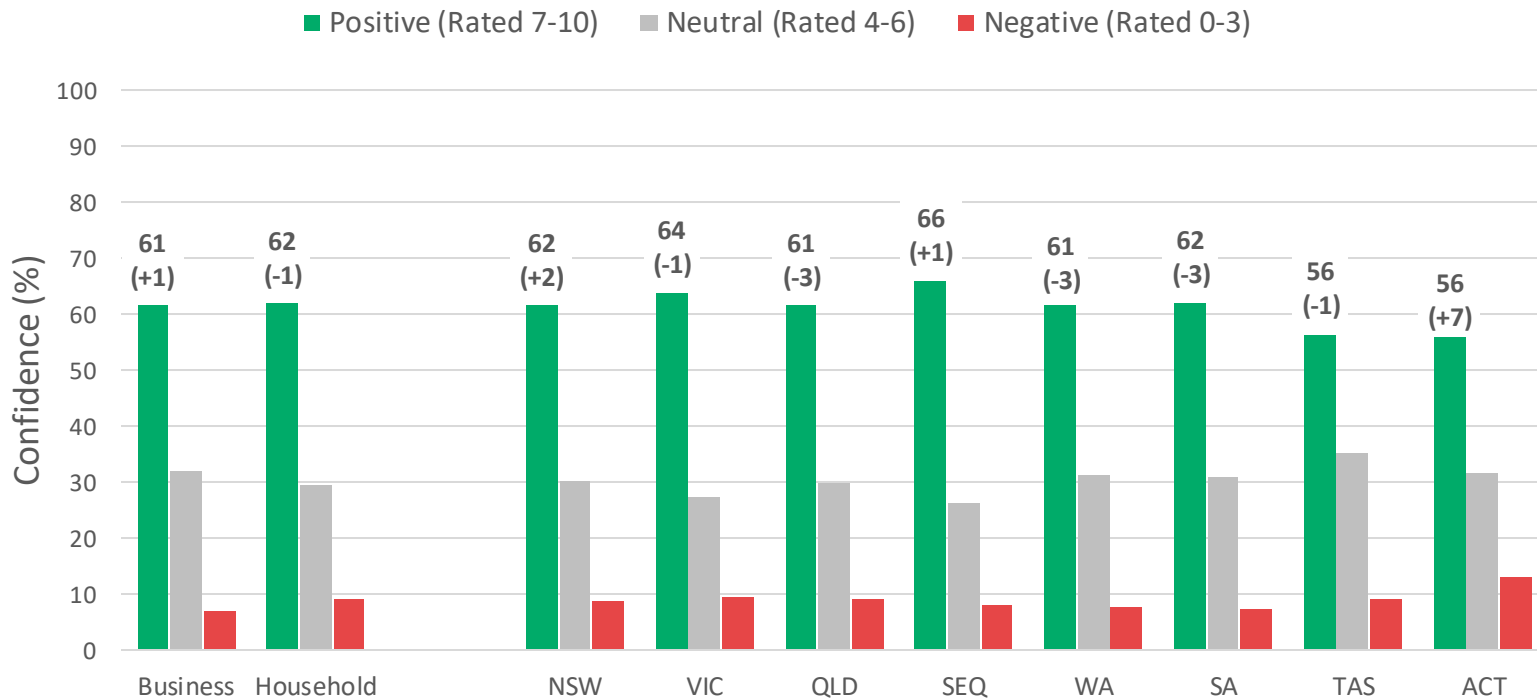
Base size: All households (min n=2,120)

Base size: All businesses (min n=500)

Confidence in the market



Confidence in ability to have problems resolved

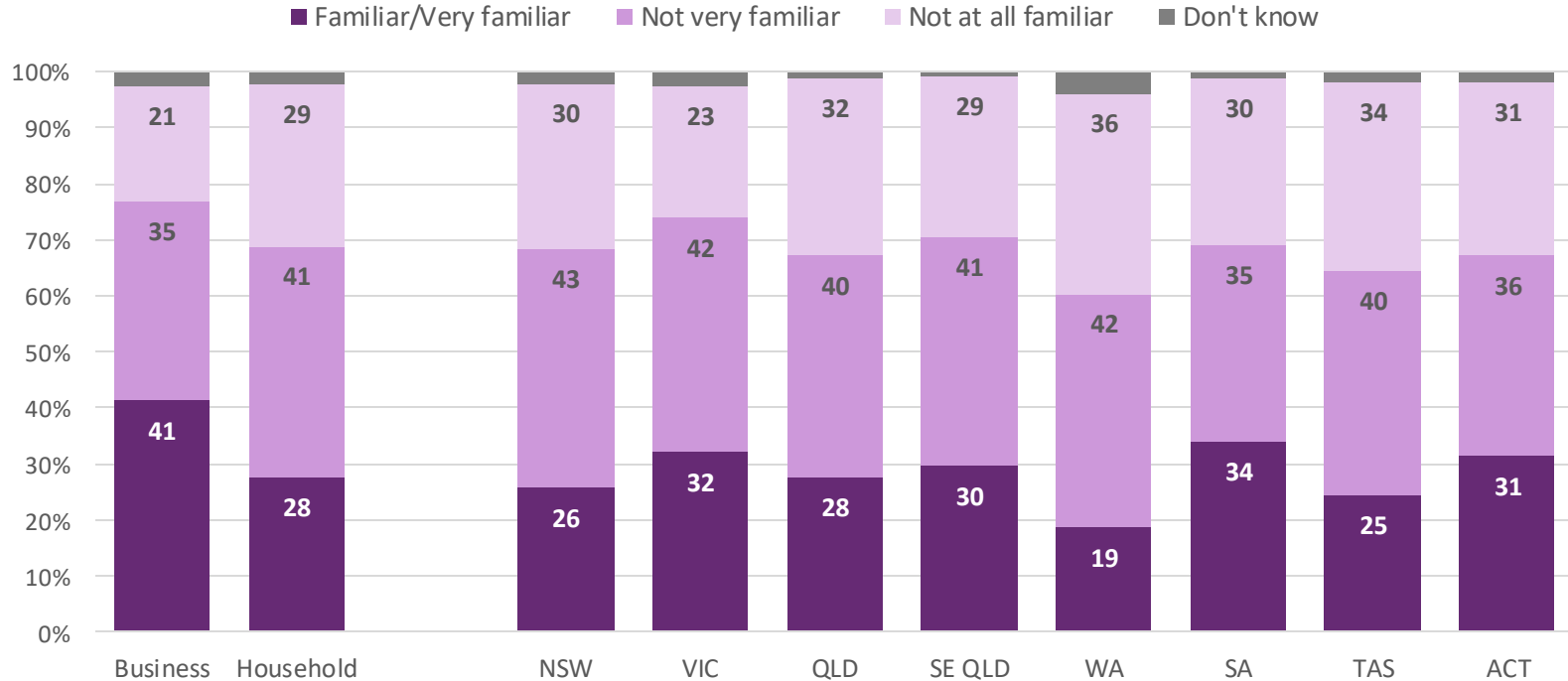


Q: How confident do you feel in the following...? **Your ability to get a problem with your energy services resolved through your energy company or a third party**

Base size: All households (min n=2,120)

Base size: All businesses (min n=500)

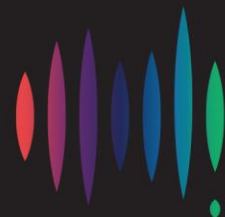
Familiarity with Ombudsman services



Q: How familiar are you with an organisation called the Energy Ombudsman, which assists consumers with complaints about energy?

Base size: All households (min n=2,120)

Base size: All businesses (min n=500)



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