

ENERGY CONSUMER SENTIMENT SURVEY

Business Topline Results
December 2020



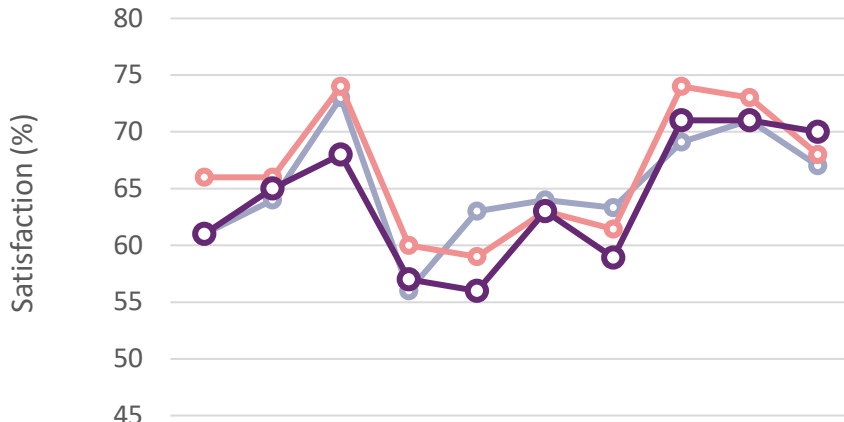
Satisfaction

- Overall business satisfaction with energy services is at 70% (consistent with 71% from this time last year).
- Satisfaction with gas billing has fallen to 68%, from 74% last year, while customer service has moved from 69% to 67%.
- Electricity customer service is at 63% (no change from last year at 62%), while billing satisfaction remained at 66%.
- Satisfaction with the level of competition is on par with December 2019 (was 60%, now 57%).



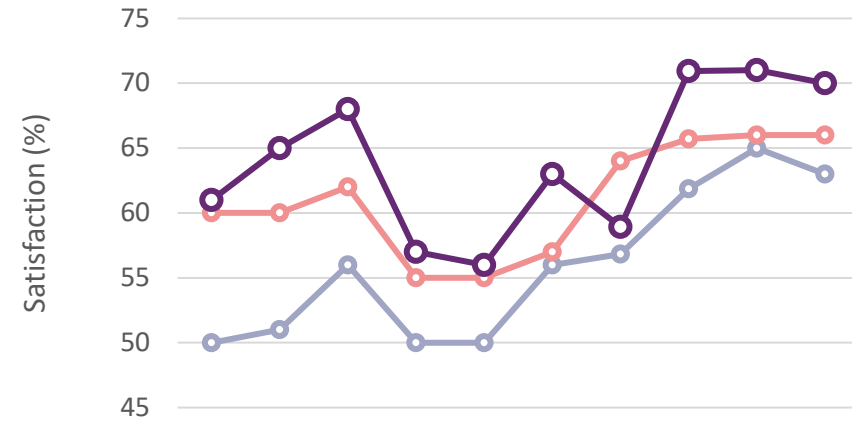
Business satisfaction with retailer measures

Business Satisfaction - Gas



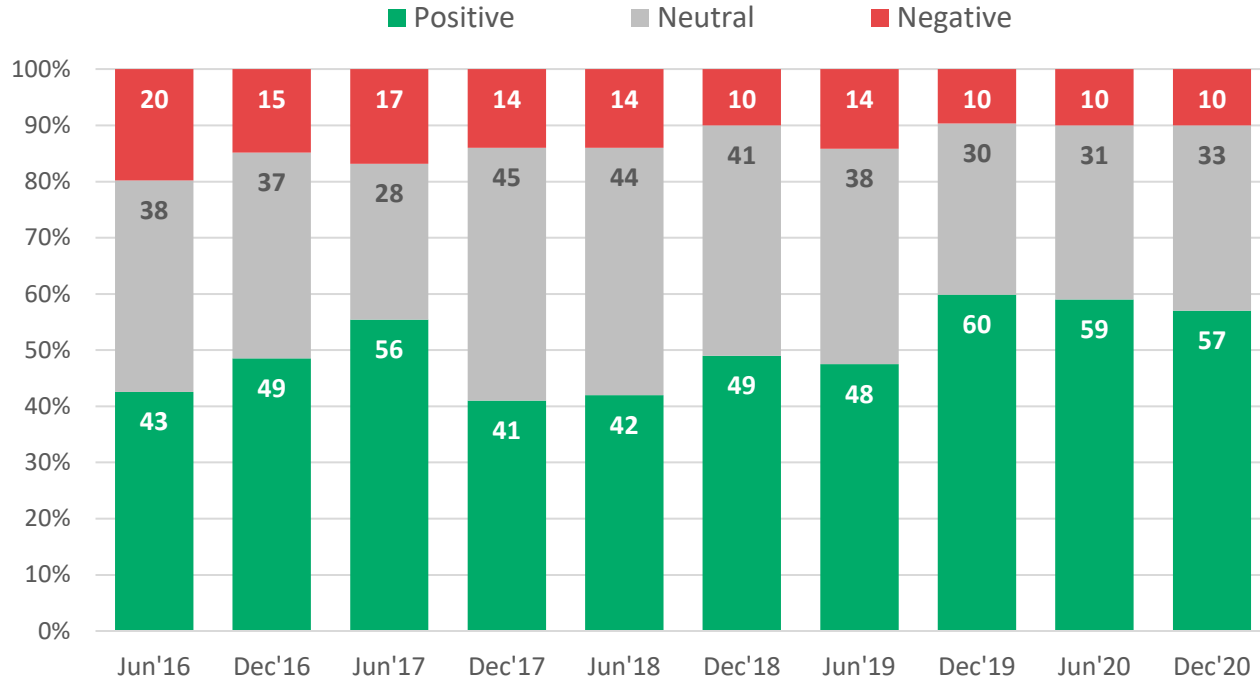
	Jun'16	Dec'16	Jun'17	Dec'17	Jun'18	Dec'18	Jun'19	Dec'19	Jun'20	Dec'20
Customer Service	61	64	73	56	63	64	63	69	71	67
Billing	66	66	74	60	59	63	61	74	73	68
Overall Satisfaction	61	65	68	57	56	63	59	71	71	70

Business Satisfaction - Electricity



	Jun'16	Dec'16	Jun'17	Dec'17	Jun'18	Dec'18	Jun'19	Dec'19	Jun'20	Dec'20
Customer Service	50	51	56	50	50	56	57	62	65	63
Billing	60	60	62	55	55	57	64	66	66	66
Overall Satisfaction	61	65	68	57	56	63	59	71	71	70

Satisfaction with level of competition (Business)

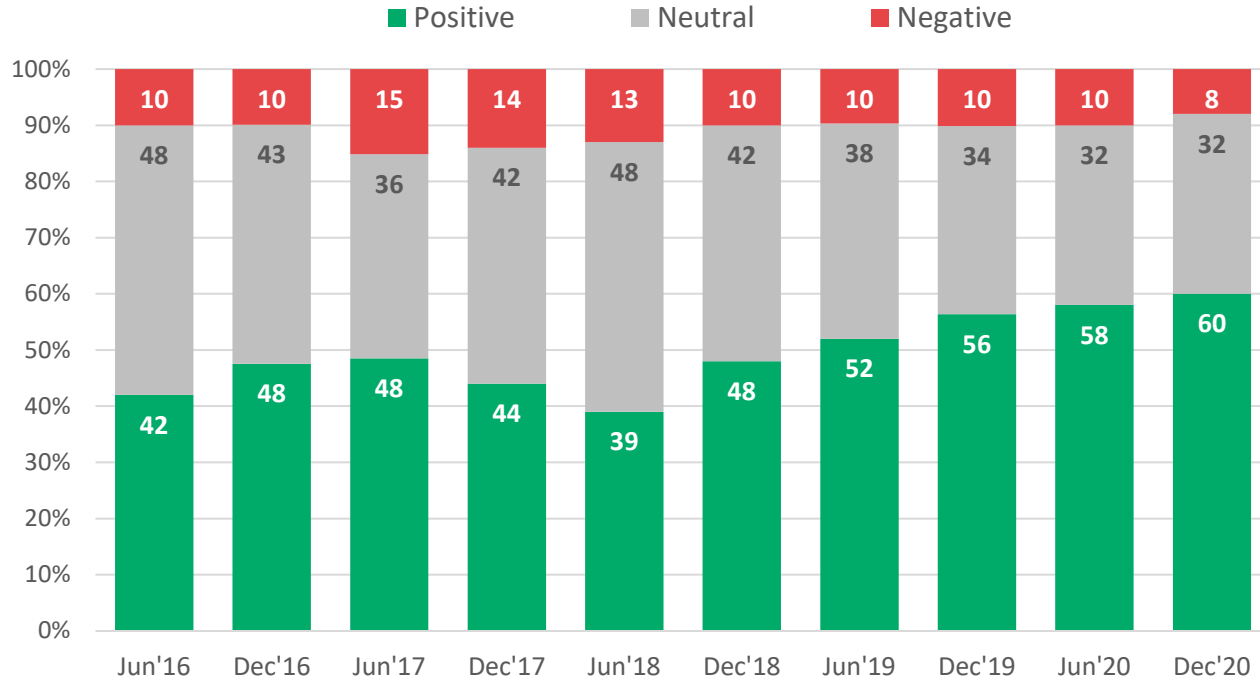


Value for money & Outages

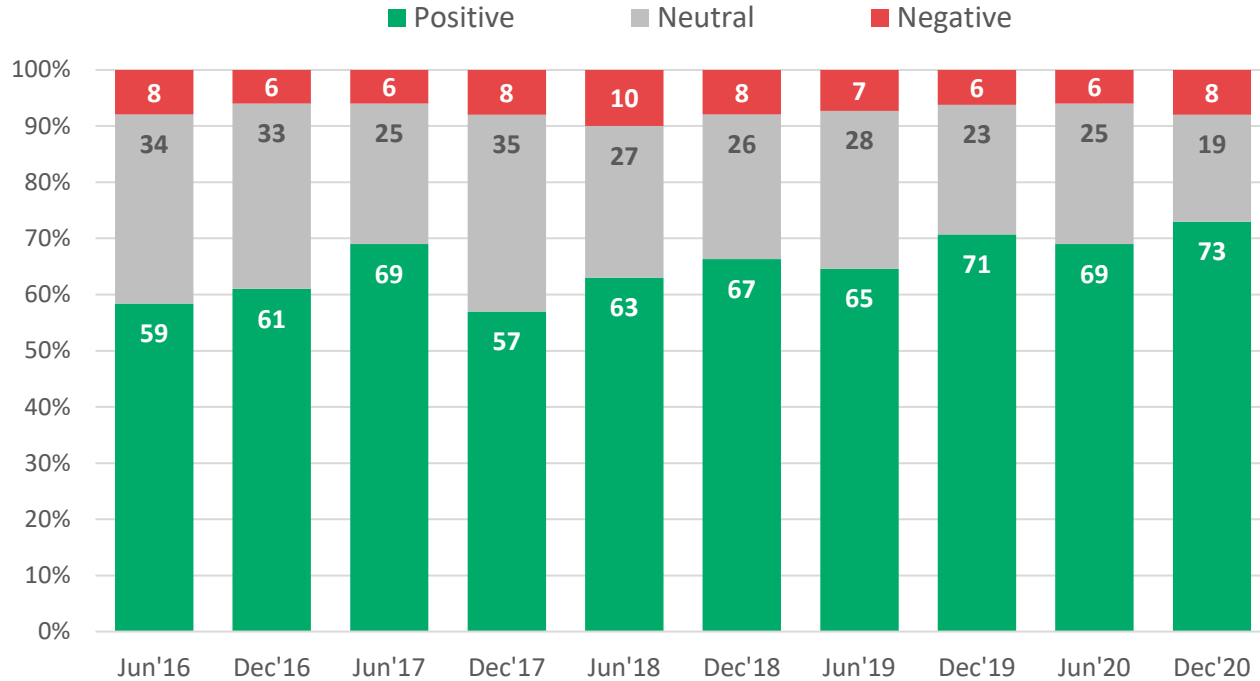
- Electricity value for money continues to increase from the June 2018 low (was 39%, now 60%).
- Similarly, positive ratings for value for money of their gas service has shown an upward trend since December 2017 (57% to 73%).
- 68% of businesses rate the reliability of their electricity positively (no change from 65% in December 2019).
- Of those who have experienced an outage, 69% rate the duration of the outages positively (no change from 66% in December 2019).



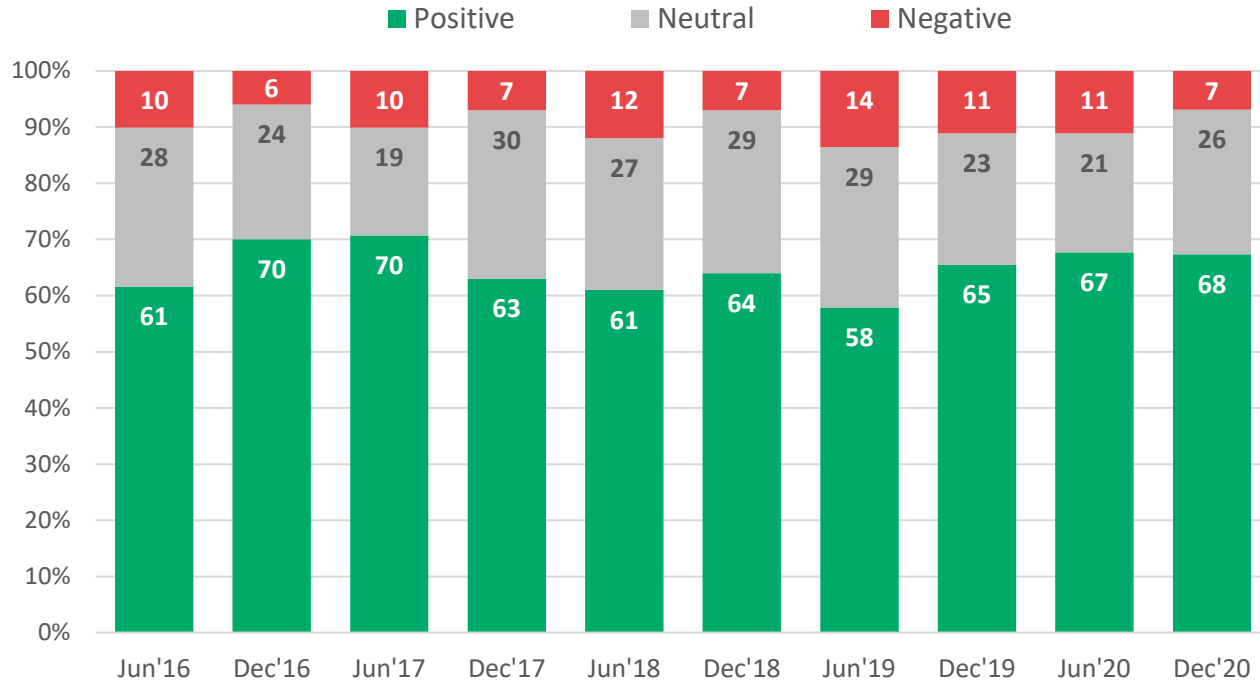
Value for money of electricity services (Business)



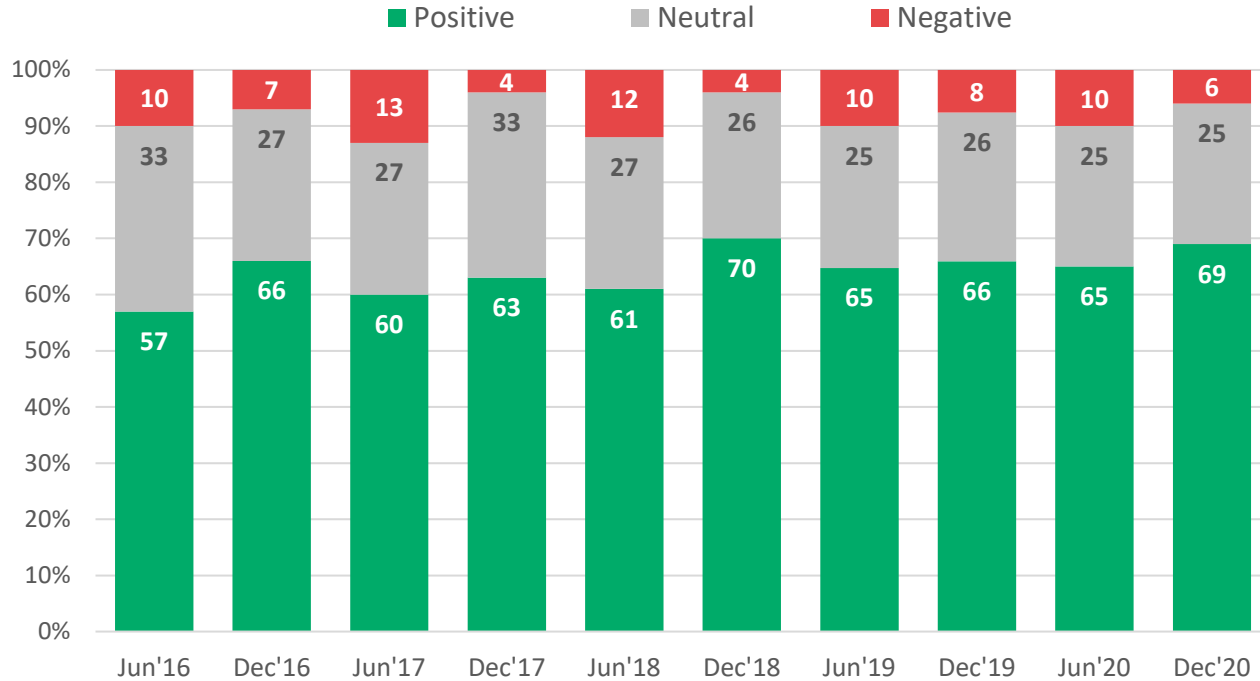
Value for money of gas services (Business)



Satisfaction with number of electricity outages (Business)



Satisfaction with duration of electricity outages (Business)

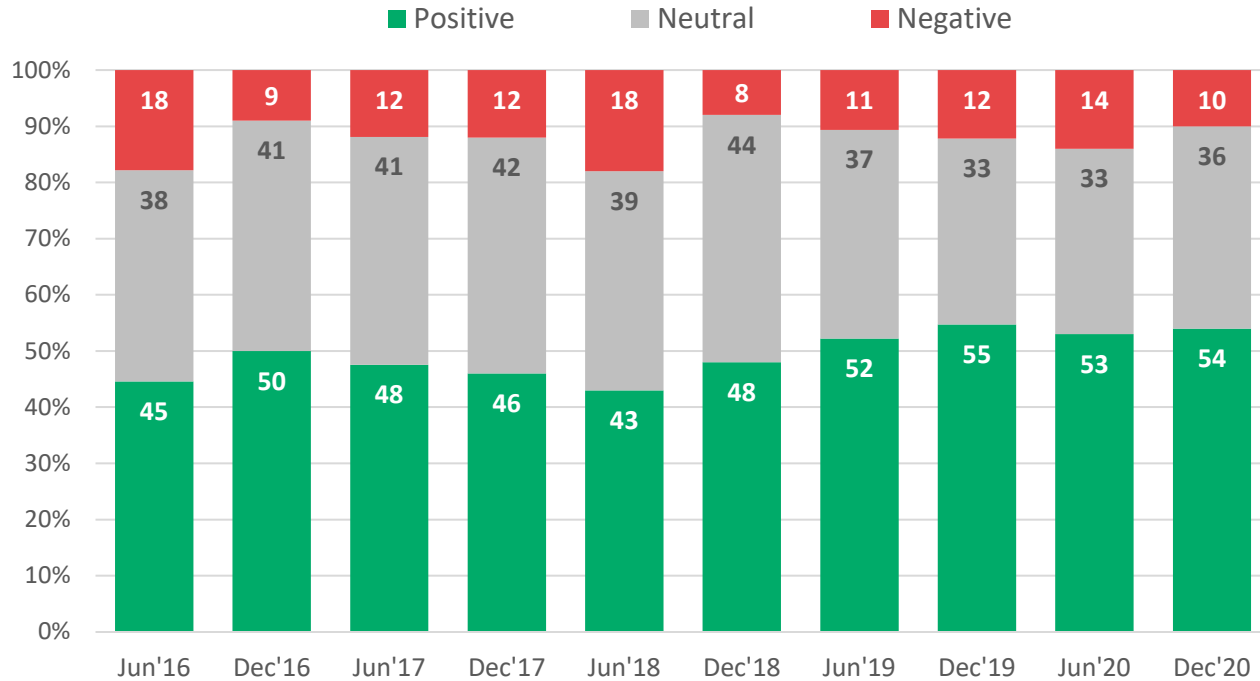


Business Confidence

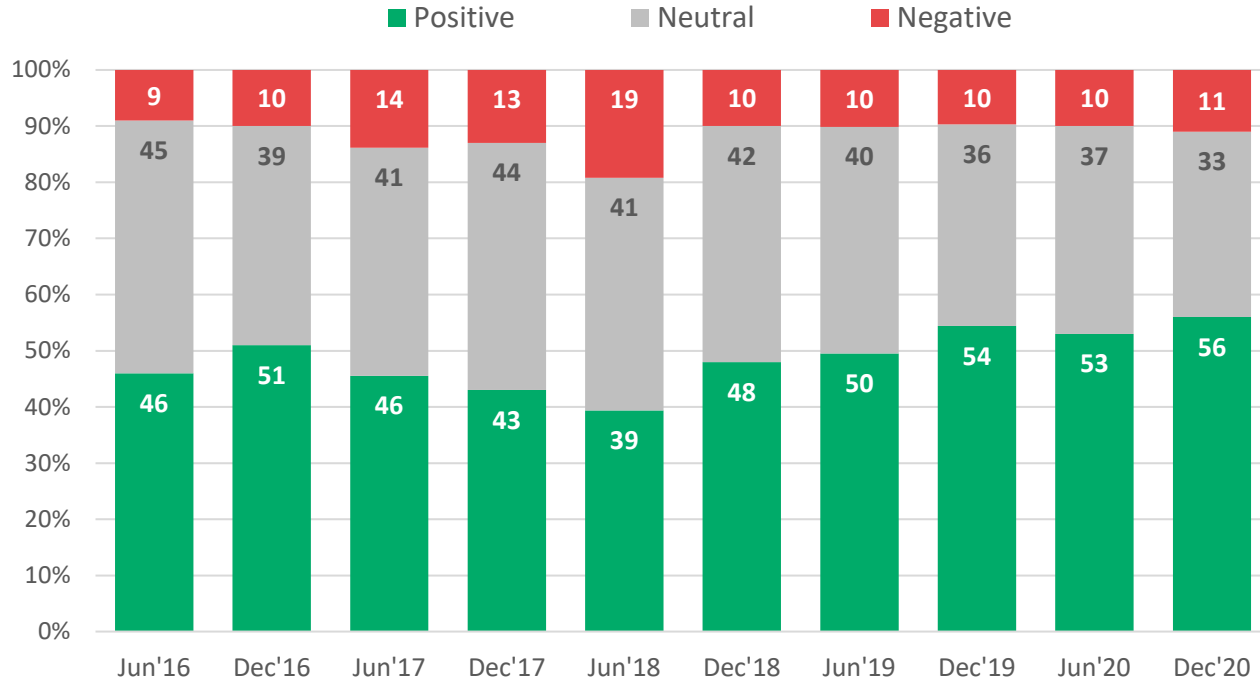
- Business confidence is largely unchanged for most metrics compared to the December 2019 survey. However, confidence in availability of easily understood information and tools have both decreased by around 4%, while confidence in the market has increased from 41% to 45%.
- Businesses have the highest confidence that they have the ability to make choices about energy products and services, such as which plan or supplier to choose (68%), but the lowest confidence that market (energy industry and energy regulators) is working in their long-term interests (45%).



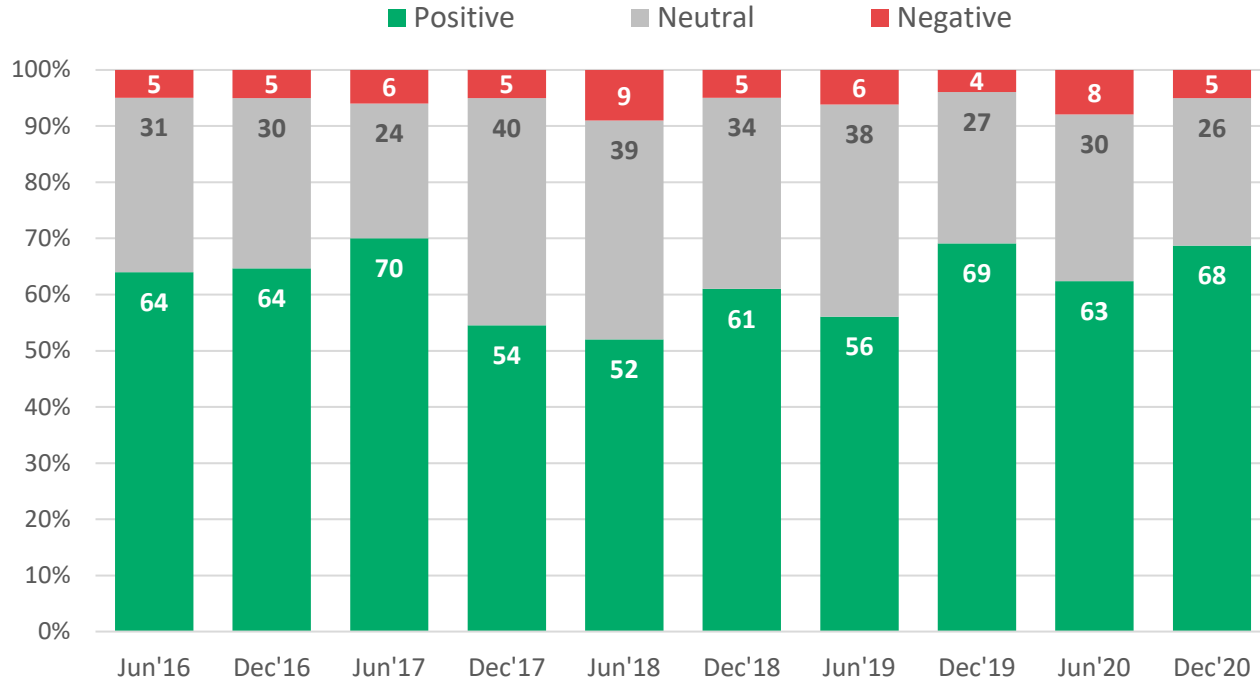
Confidence in future reliability (Business)



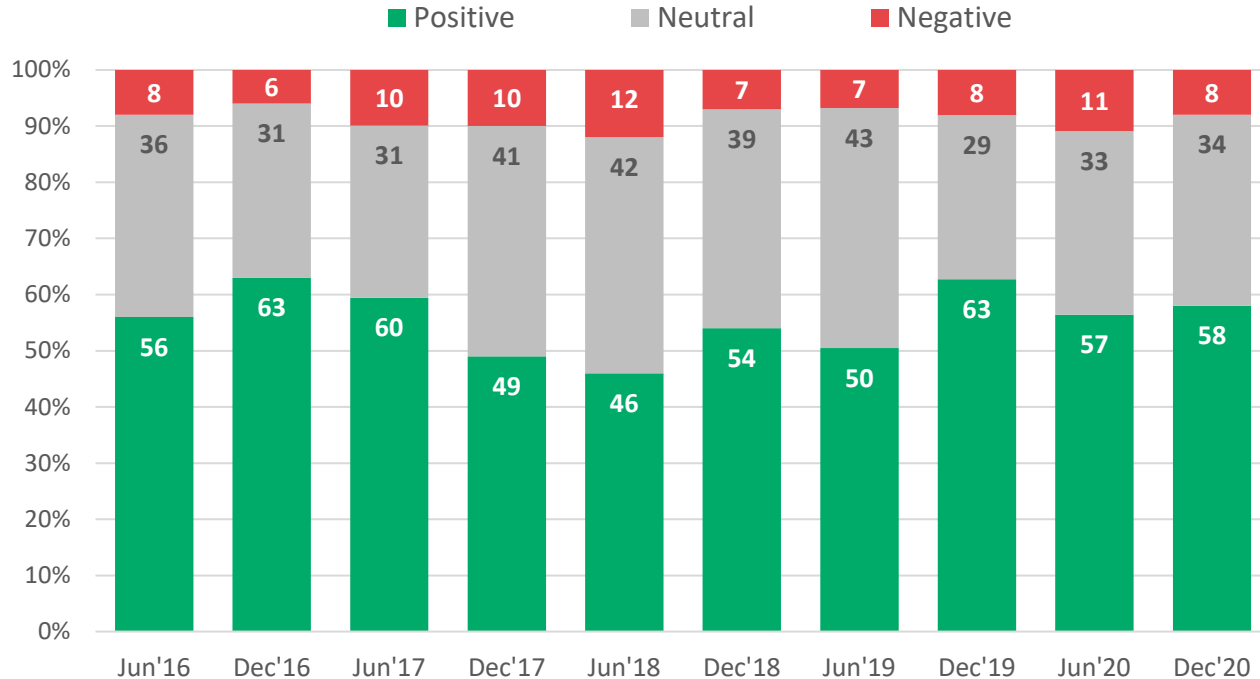
Confidence in advances in technology (Business)



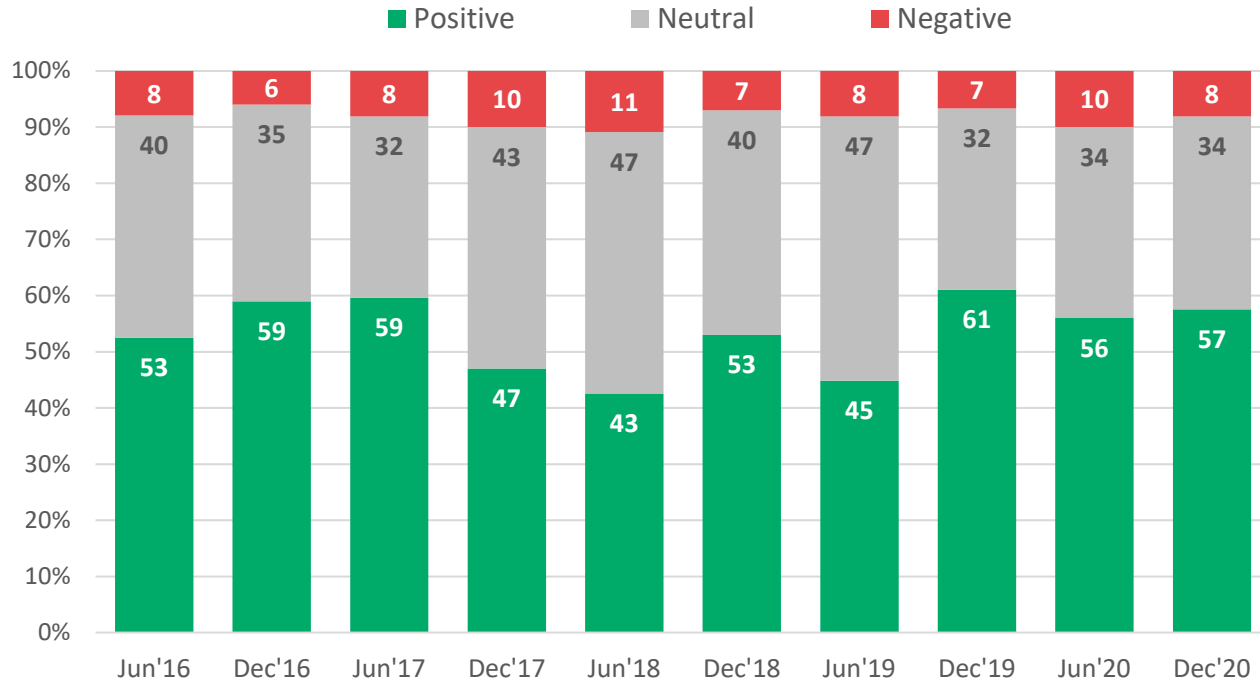
Confidence in ability to make choices (Business)



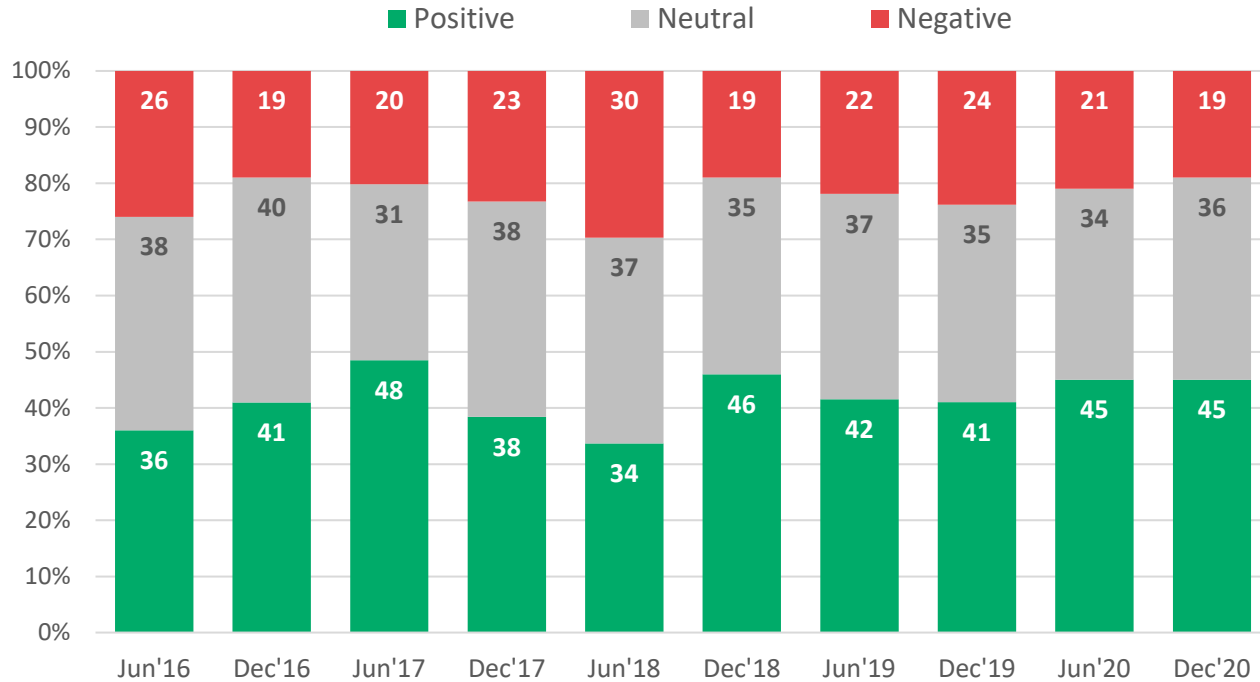
Confidence in availability of enough easily understood information (Business)

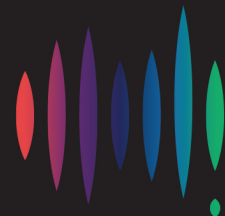


Confidence in availability of tools (Business)



Confidence in the market (Business)





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