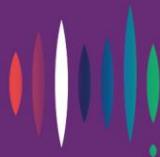
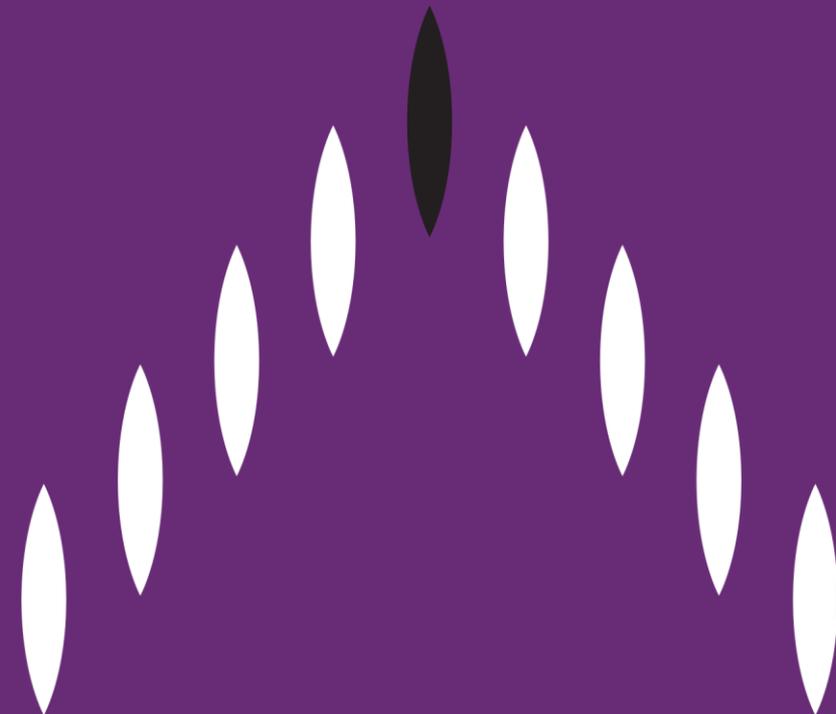


ENERGY CONSUMER SENTIMENT SURVEY

Household Topline Results
June 2021



ENERGY
CONSUMERS
AUSTRALIA

Key findings

Australians' perceptions of the electricity and gas system have clearly improved over the last year. Most measures in this survey have shown steady improvement since the December 2017 survey, and the positive shifts are noticeable across most states and territories.

70% of Australian household consumers, for example, now rate the value for money of electricity positively, up 13% over the last year and up 36% since December 2017. The increase in the percentage giving positive ratings for gas is smaller but still clear (now 72%, up 4% over the last year and 21% since December 2017).

Improvements in confidence in future value for money are smaller. 43% of household consumers now say they are confident that the market will deliver value for money in the future, up 2%.

46% of household consumers now say that they are confident that the electricity and gas market is working in their long-term interests, up 10% over the last year. The proportion of household consumers expressing confidence that the market is working in their long-term interests has more than doubled since December 2017, when just 21% said that they were confident in this.

Despite this increased confidence in the future, many household consumers are still concerned about the future affordability of electricity. This question is new to the Energy Consumer Sentiment Survey, and shows that 62% of household consumers are concerned that electricity and gas will become

unaffordable for them over the next 10-20 years. Similarly, 73% of household consumers are concerned that electricity and gas will become unaffordable for others in their community over that time period.

Australian energy consumers also express considerable doubts about the future in other ways:

- 69% of household consumers say they are concerned that the energy system in Australia will fail to keep up with the changing way in which we use energy.
- 72% of household consumers are concerned that we won't have plans in place to replace or update aging coal-fired power plants when they reach the end of their operational lives.
- 58% of household consumers are worried that there will be frequent electricity outages in 10-20 years' time.

Questions on present reliability of electricity have been revised for the latest survey to provide more detail.

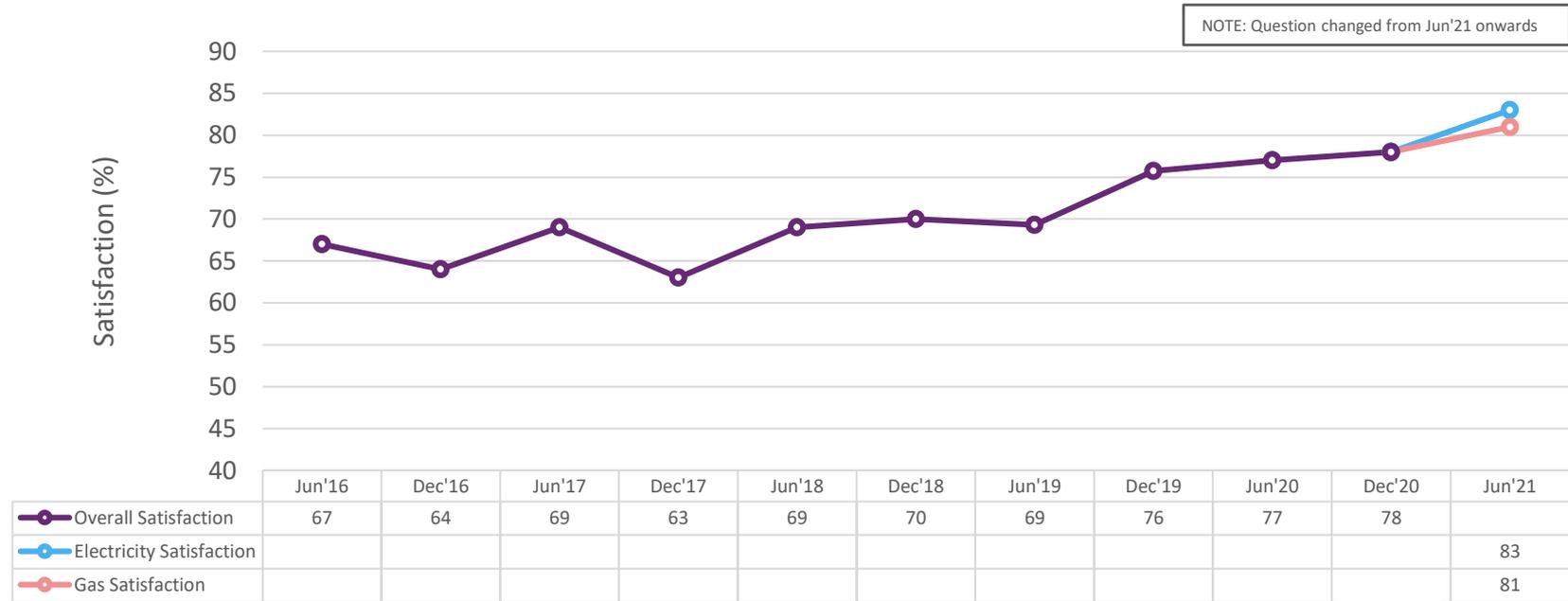
33% of household consumers report that they have had an outage in the last six months. Of this group 54% were satisfied with the number of times they had faults and 63% were happy with the time taken to restore supply. Ratings were a little less positive for communication about the fault, with 48% reporting being satisfied and 26% dissatisfied.

Satisfaction

- Household overall satisfaction with gas and electricity services continues to increase from the December 2017 low (now 83% for electricity and 81% for gas, up from 63%).
- Just one state or territory did not record year-on-year increases in electricity satisfaction – ACT (79% to 74%). Gas satisfaction also decreased in ACT (79% to 76%).
- Satisfaction is highest for ease of accessing electricity account (76%) and having clear billing information (74%)
- 85% of households with gas give a positive rating for the reliability of service.



Satisfaction with retailer measures: Provision of electricity and gas services

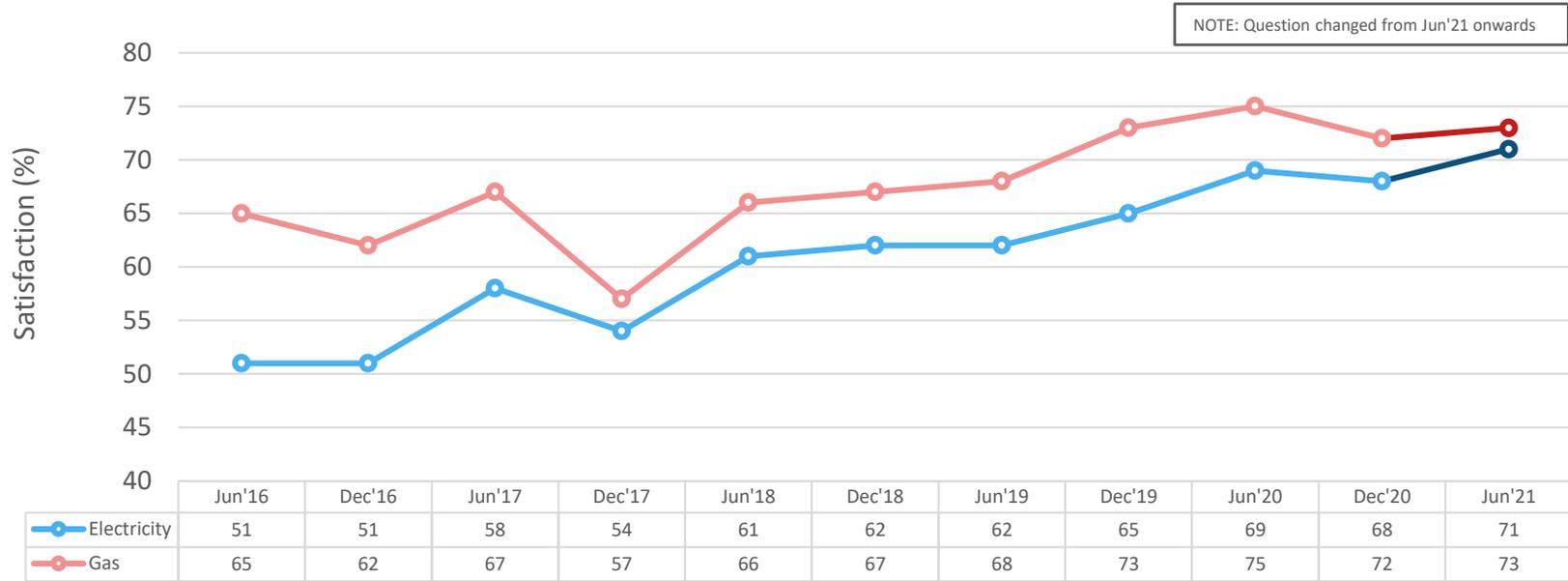


Q (Jun'16-Dec'20): How satisfied are you with the following? **The provision of your electricity and gas services overall over the last 6 months**, Base size: All households (min. n=2,000)

Q (Jun'21): How satisfied are you with the following elements of your electricity service over the past 6 months? **The provision of your electricity service**, Base size: All households (n= 2,274)

Q (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 (n= 1,263)

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)

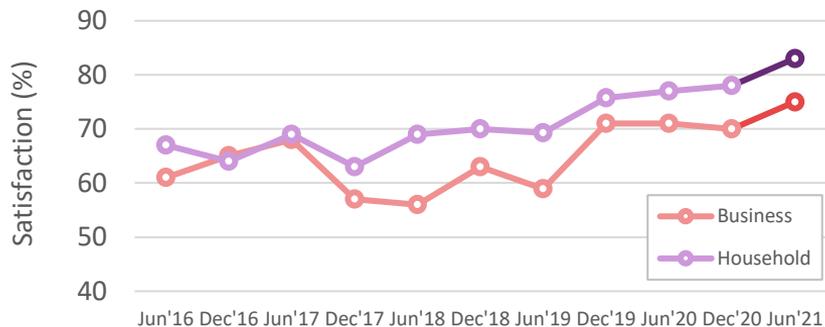
Q (Jun'21): How satisfied are you with the following aspects of your electricity retailer in the past 6 months? **Overall customer service**, Base size: All households (n= 2,274)

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)

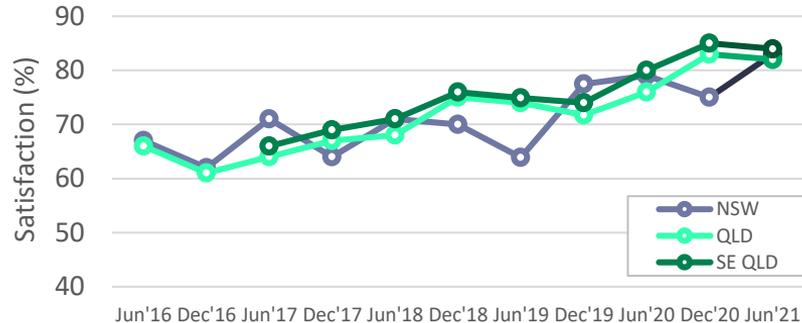
Q (Jun'21): How satisfied are you with the following aspects of your gas retailer in the past 6 months? **Overall customer service**, Base size: All households with a mains gas supply (n= 1,263)

Overall satisfaction with electricity services

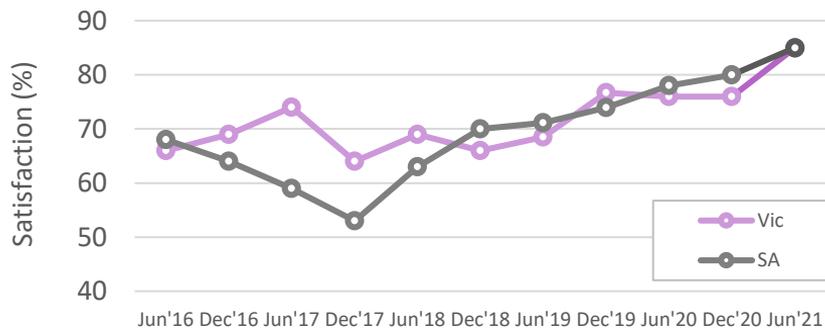
Overall Satisfaction - Business & Household



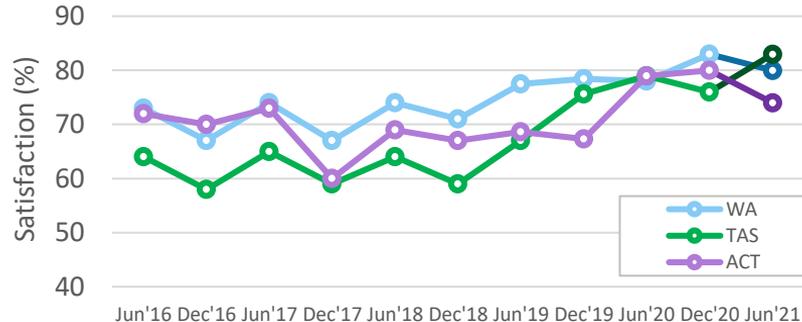
Overall Satisfaction - NSW, QLD & SE QLD



Overall Satisfaction - Victoria & SA



Overall Satisfaction - WA, TAS & ACT

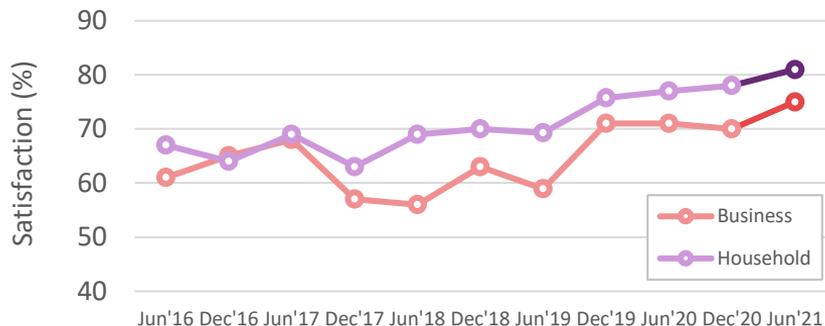


Q (Jun'16-Dec'20): How satisfied are you with the following? **The provision of your electricity and gas services overall over the last 6 months**, Base size: All households (min. n=2,000)

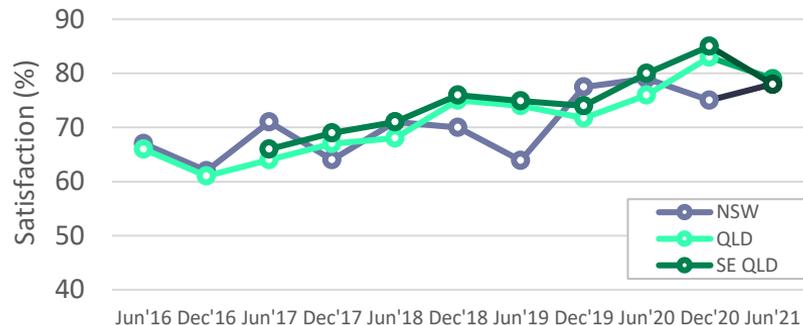
Q (Jun'21): How satisfied are you with the following elements of your electricity service over the past 6 months? **The provision of your electricity service**, Base size: All households (n= 2,274)

Overall satisfaction with gas services

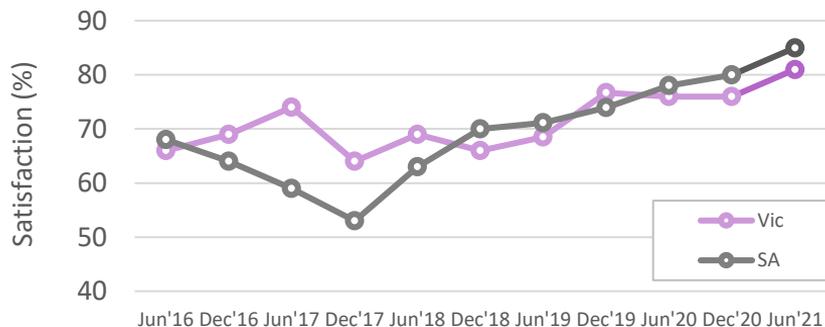
Overall Satisfaction - Business & Household



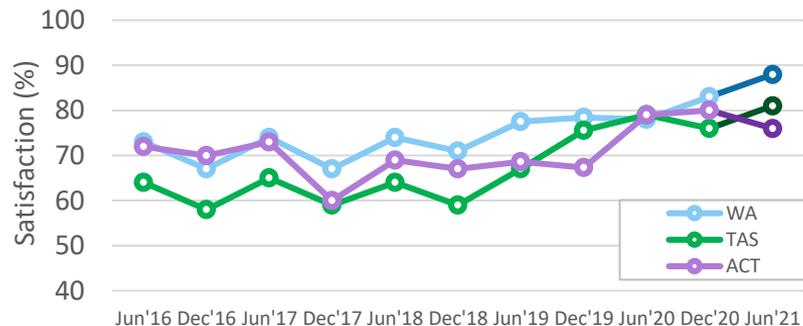
Overall Satisfaction - NSW, QLD & SE QLD



Overall Satisfaction - Victoria & SA



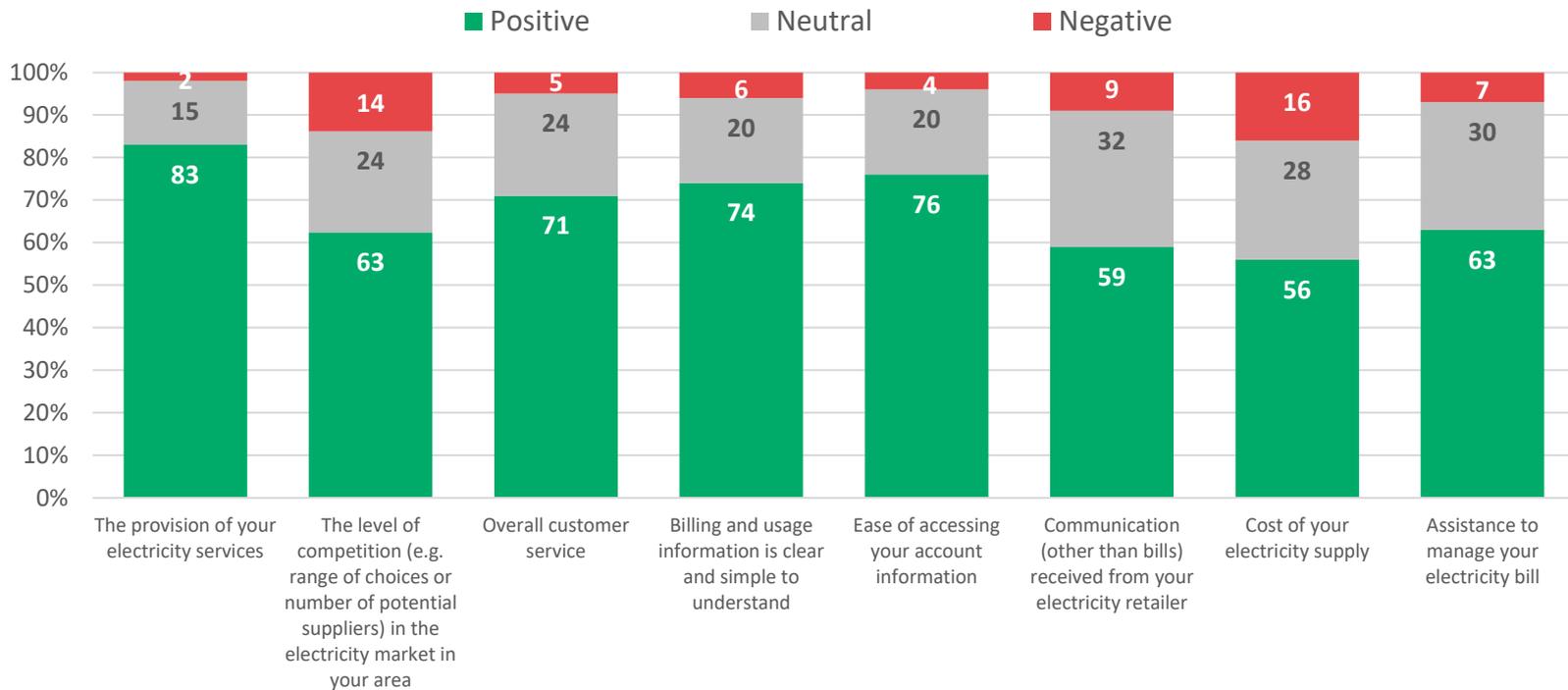
Overall Satisfaction - WA, TAS & ACT



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 (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 (n= 1,263)

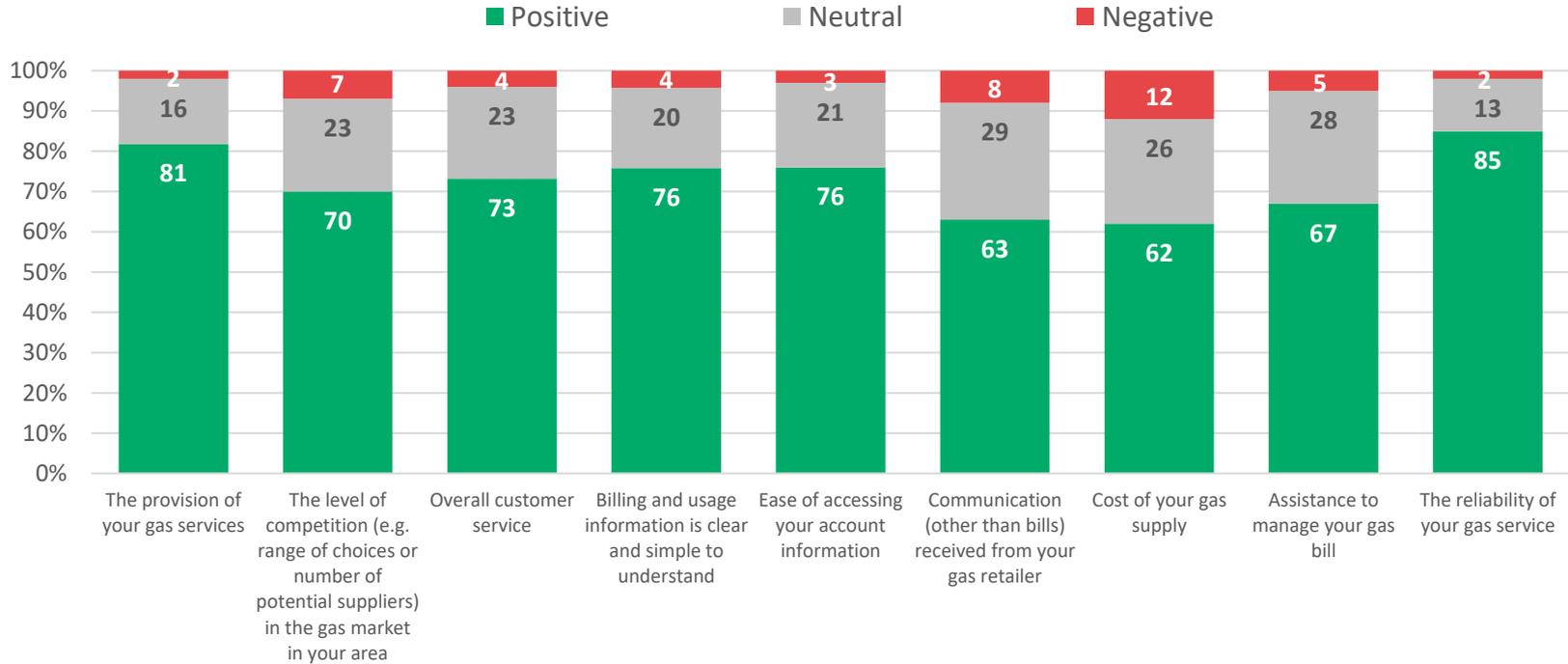
Satisfaction with retailer measures: Electricity



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

Q (Jun'21) How satisfied are you with the following elements of your electricity service over the past 6 months? Base size: All households (n=2,274)

Satisfaction with retailer measures: Gas

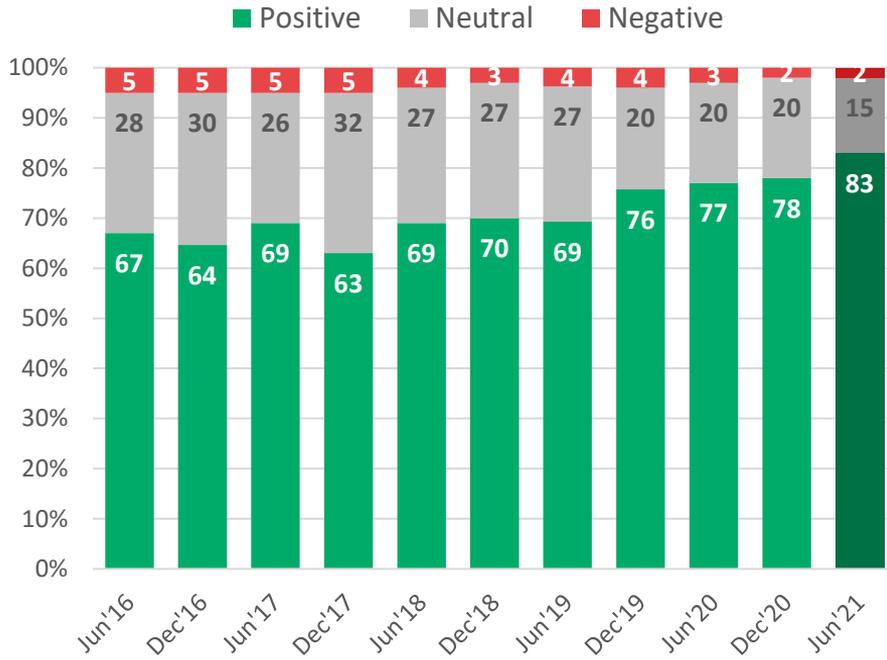


Q (Jun'16-Dec'20): How satisfied are you with the following? Base size: All households with a mains gas supply (min. n=1,000)

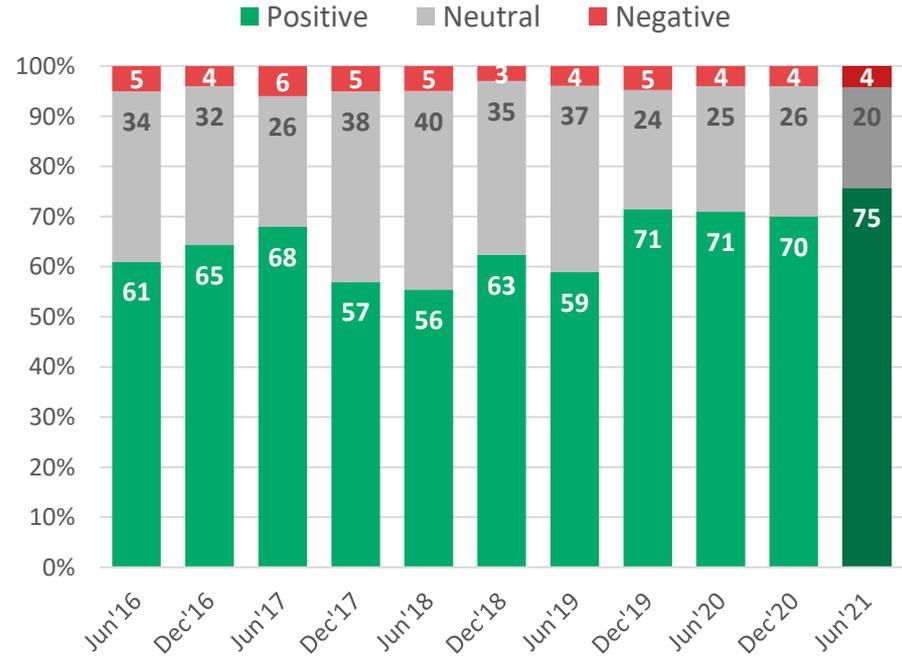
Q (Jun'21) How satisfied are you with the following elements of your gas service over the past 6 months? Base size: All households with a mains gas supply (n=1,263)

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)

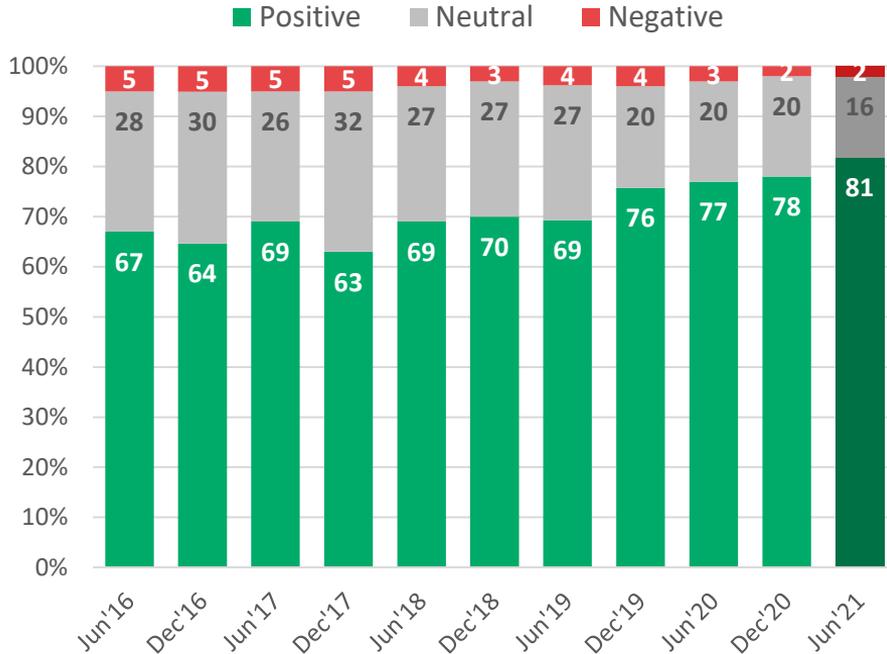
Q (Jun'21): How satisfied are you with the following elements of your electricity service over the past 6 months? **The provision of your electricity service**, Base size: All households (n=2,274)

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)

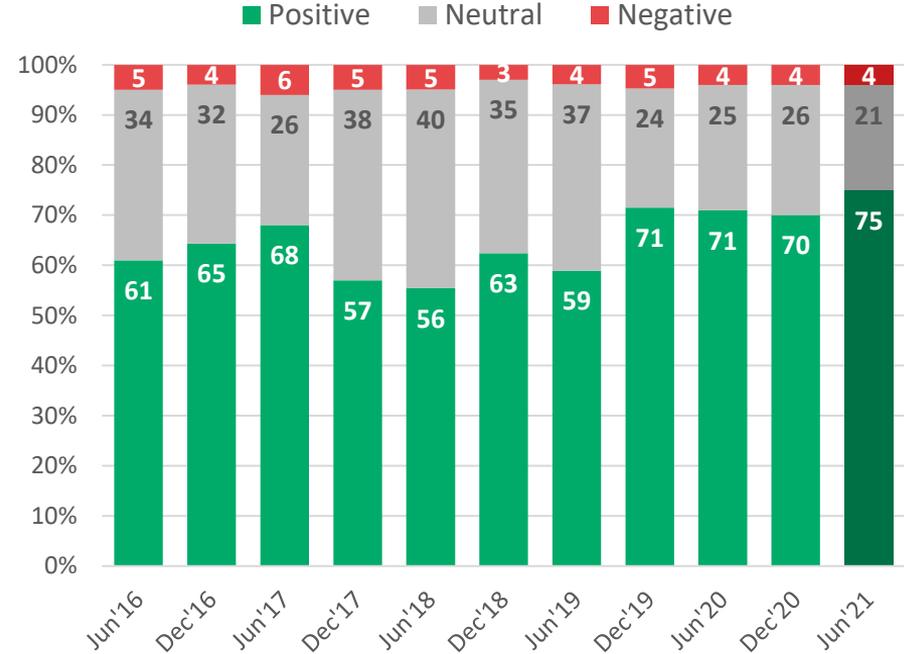
Q (Jun'21): How satisfied are you with the following elements of your electricity service over the past 6 months? **The provision of your electricity service**, Base size: All businesses (n=551)

Overall satisfaction with gas services (Business/Household)

Overall Satisfaction - Household



Overall Satisfaction - Business



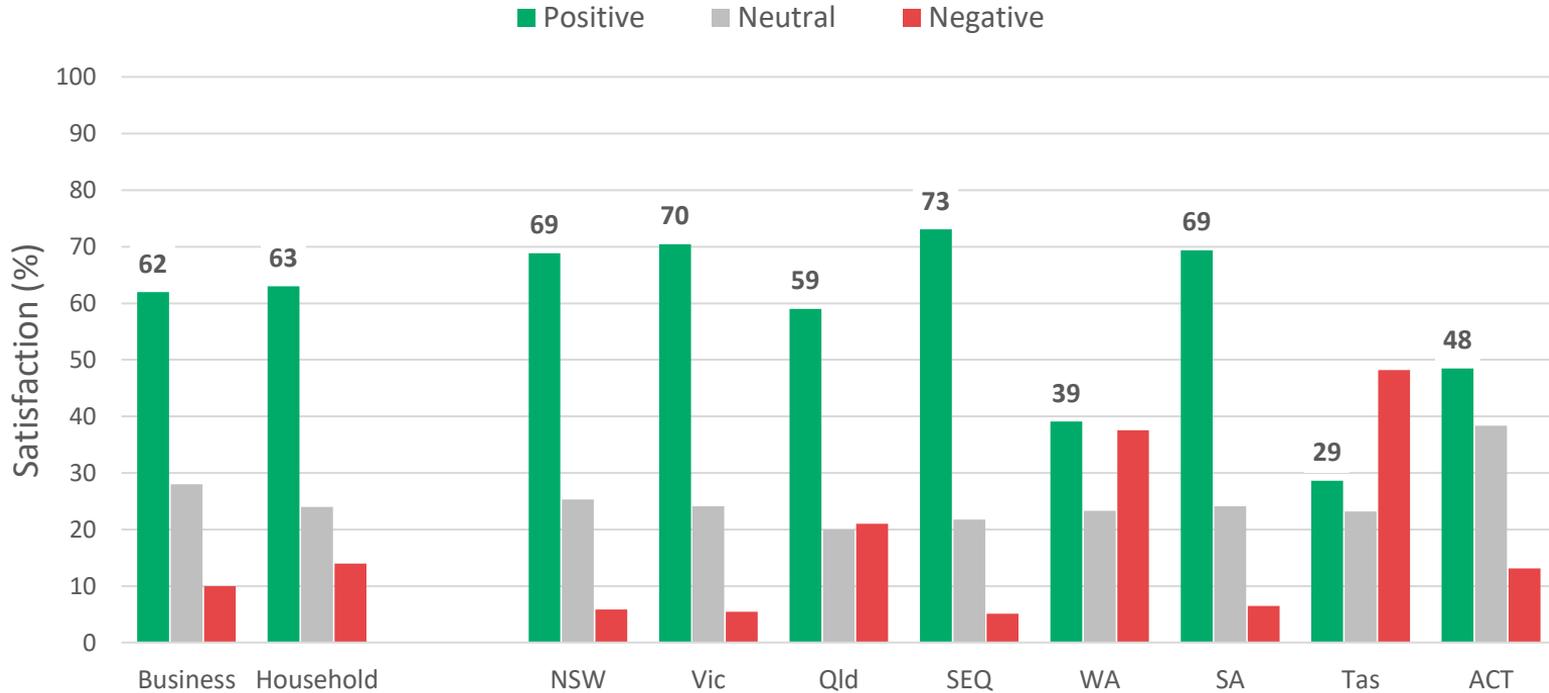
Q (Jun'16-Dec'20): How satisfied are you with the following? **The provision of your electricity and gas services overall over the last 6 months**, Base size: All households (min. n=2,000)

Q (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 (n= 1,263)

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 (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 (n=326)

Satisfaction with level of competition: Electricity

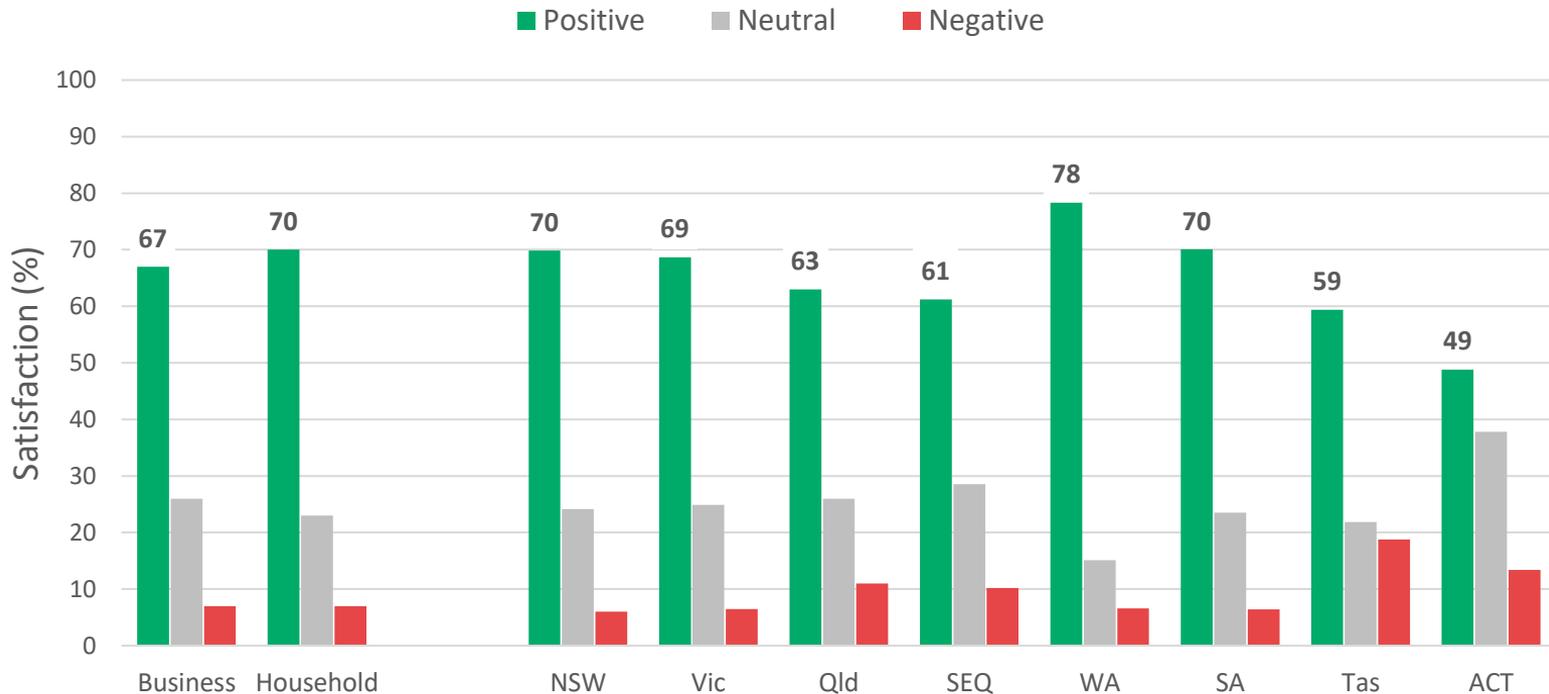


Q (Jun'16-Dec'20): How satisfied are you with the level of competition in the energy market in your area? Base size: All households (min. n=2,000), All businesses (min. n=200)

Q (Jun'21): How satisfied are you with the following elements of your electricity service over the past 6 months? **The level of competition (e.g. range of choices or number of potential suppliers) in the electricity market in your area**

Base size: All households (n= 2,274), All businesses (n=551)

Satisfaction with level of competition: Gas



Q (Jun'16-Dec'20): How satisfied are you with the level of competition in the energy market in your area? Base size: All households (min. n=2,000), All businesses (min. n=200)

Q (Jun'21): How satisfied are you with the following elements of your gas service over the past 6 months? **The level of competition (e.g. range of choices or number of potential suppliers) in the gas market in your area**

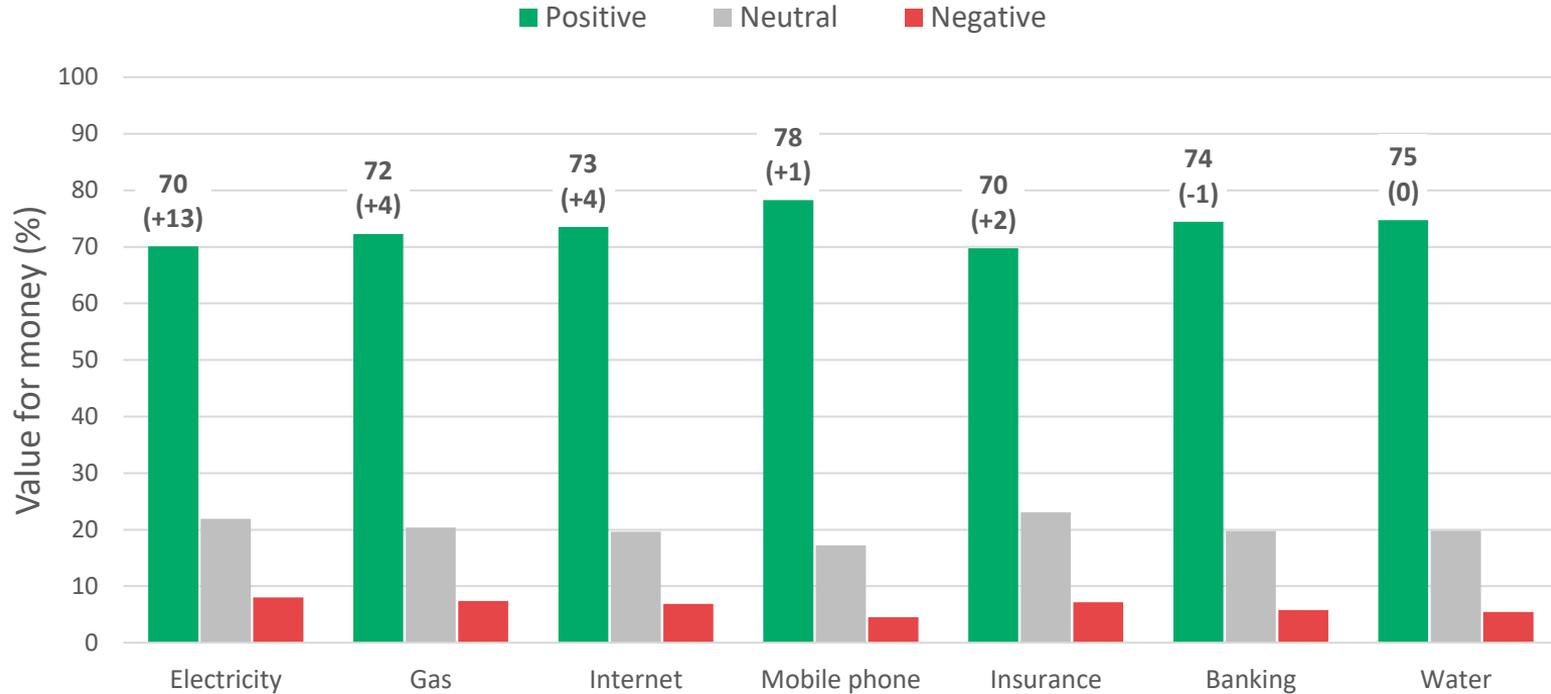
Base size: All households with a mains gas supply (n= 1,263), All businesses with a mains gas supply (n=326)

Value for money & Outages

- Electricity value for money has increased to 70% (from 57%) and is now comparable to other utility services. Value for money of gas services is at 72% (68% last year).
- 33% of households have experienced an electricity outage in the last 6 months.
- For households who experienced an electrical outage, satisfaction with the duration is at 63%, and 48% are satisfied with the communication from the electricity company during the outage.



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 (n= 2,274)

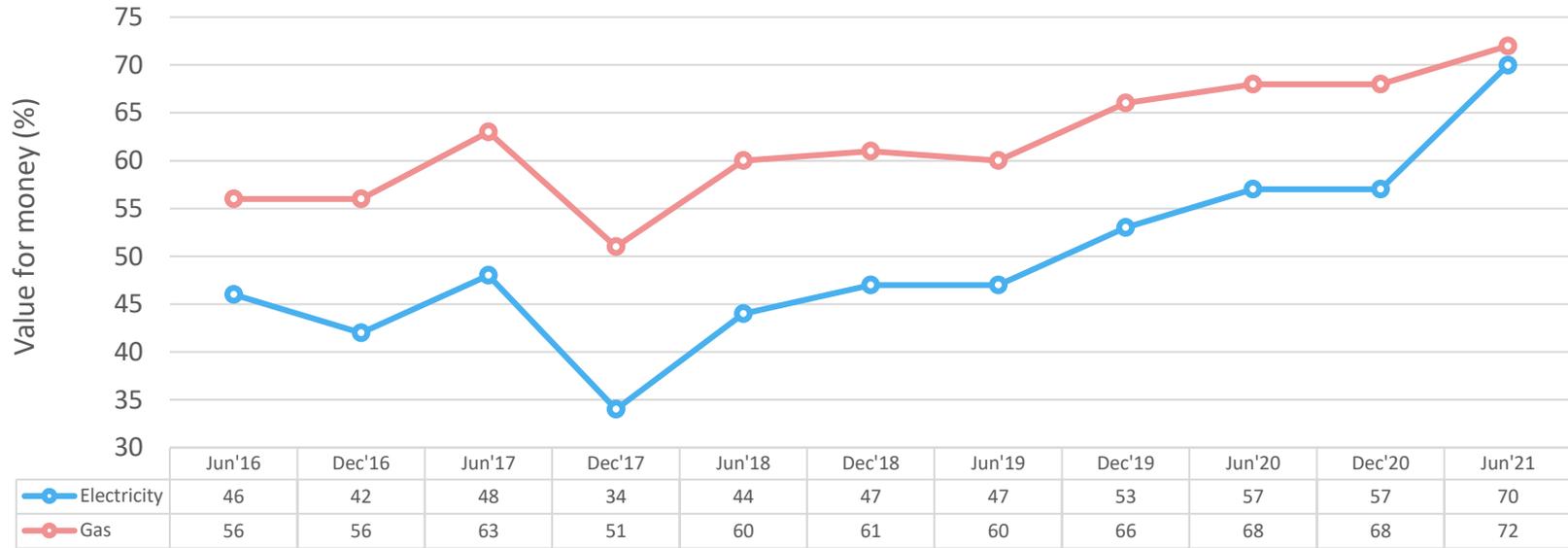
Q: How would you rate the overall value for money of the products and services provided by your gas retailer in the past 6 months?

Base size: All households with a mains gas supply (n= 1,263)

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 (n= 2,274)

Value for money



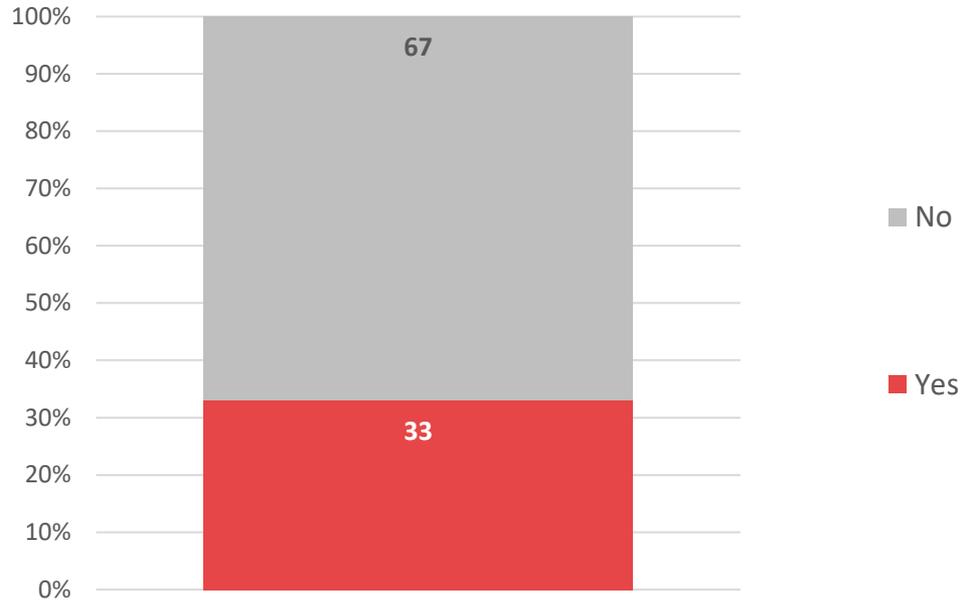
Q: How would you rate the overall value for money of the products and services provided by your electricity company in the past 6 months?

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

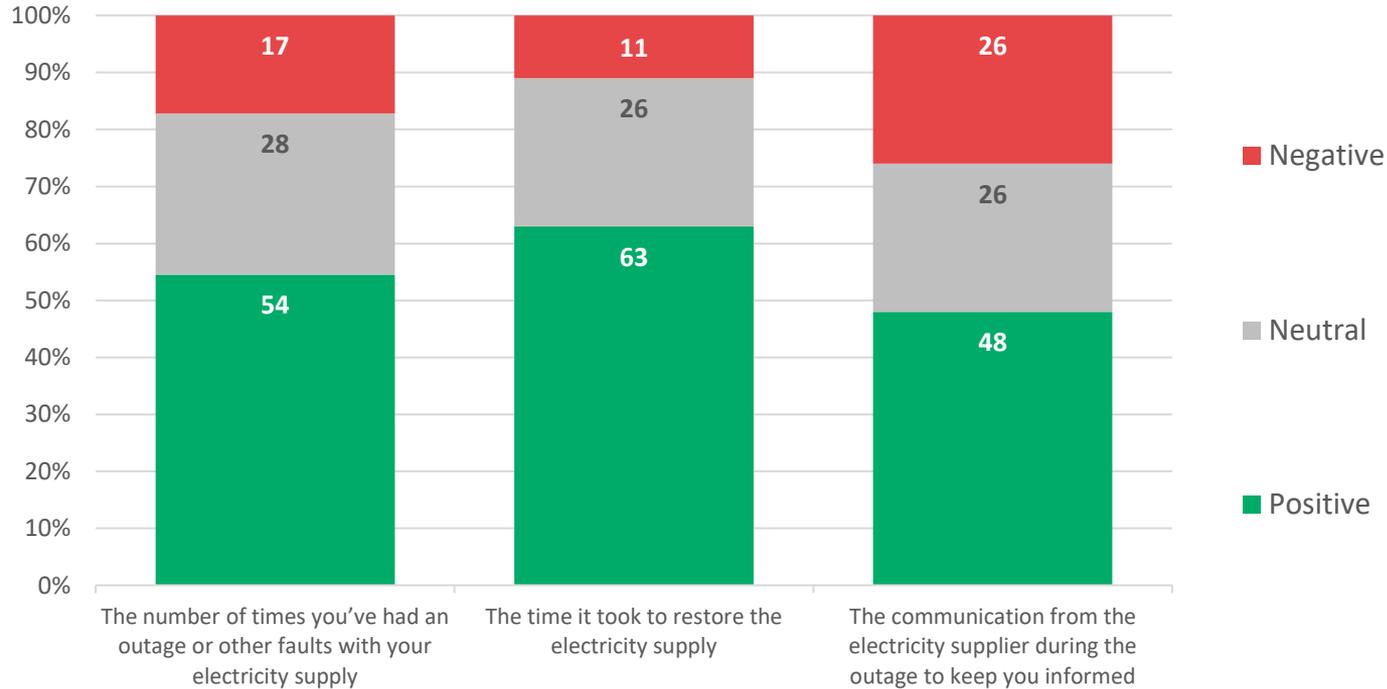
Q: How would you rate the overall value for money of the products and services provided by your gas retailer in the past 6 months?

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 (n=772)

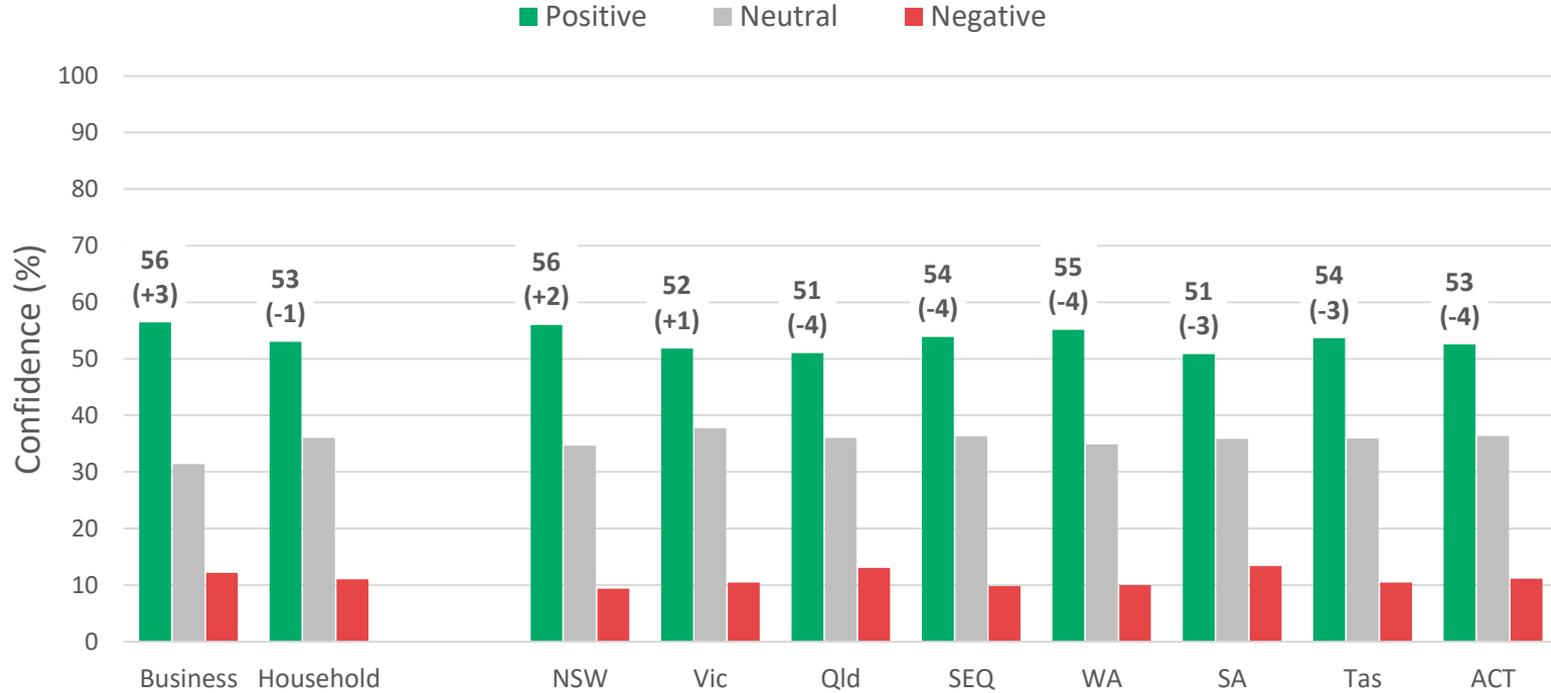
NOTE: Jun'16-Dec'20 results not shown due to questionnaire change in Jun'21 meaning time series discontinued.

Household Confidence

- Household confidence in future reliability declined for the first time since 2017 – now at 53%.
- 67% of households say they are confident in their ability to make choices about energy products and services, such as which plan or supplier to choose, but just 46% are confident that the market (energy industry and energy regulators) is working in their long-term interests.
- One-third of households are familiar with the Energy Ombudsman.



Confidence in future reliability

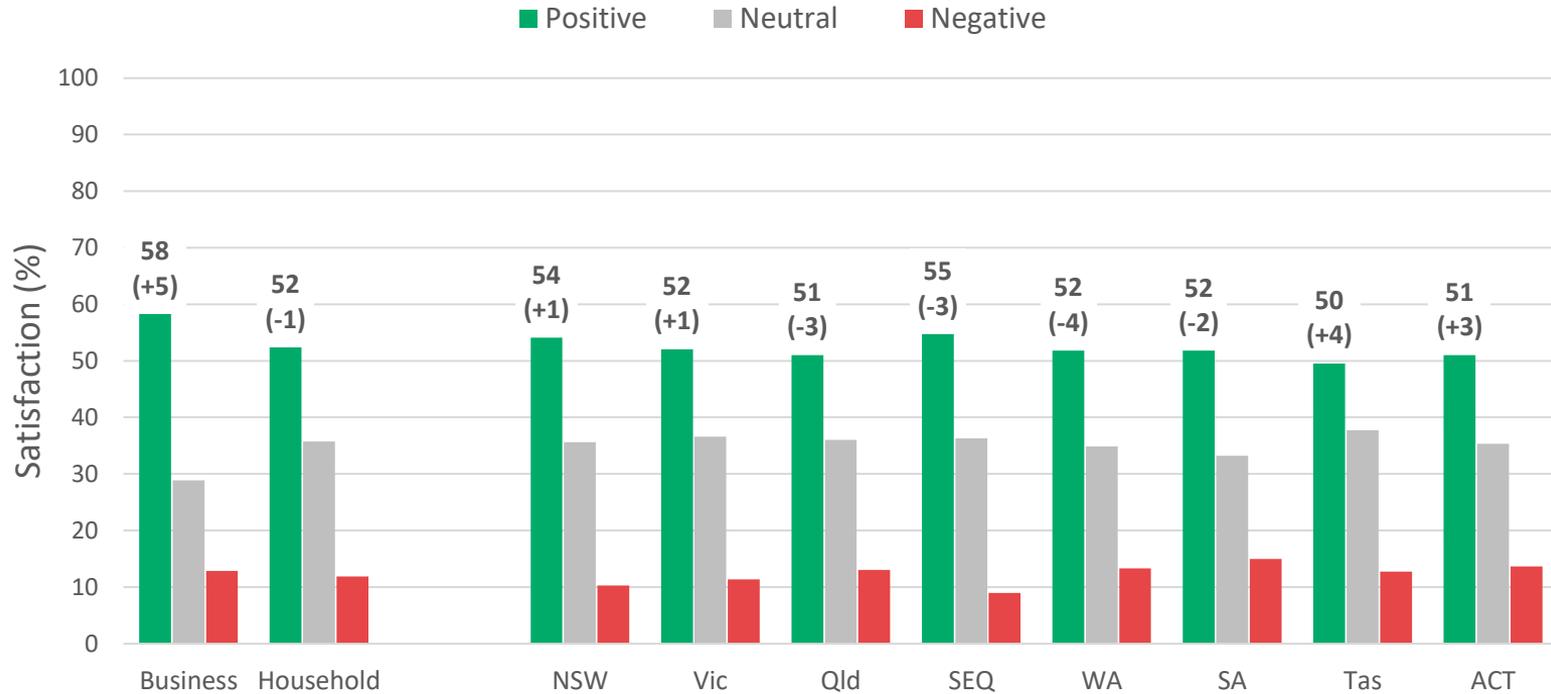


Q: Thinking about the overall market outcomes, how confident are you that the energy market will provide better outcomes for you in 5 years, in terms of...? **Provide a more reliable supply**

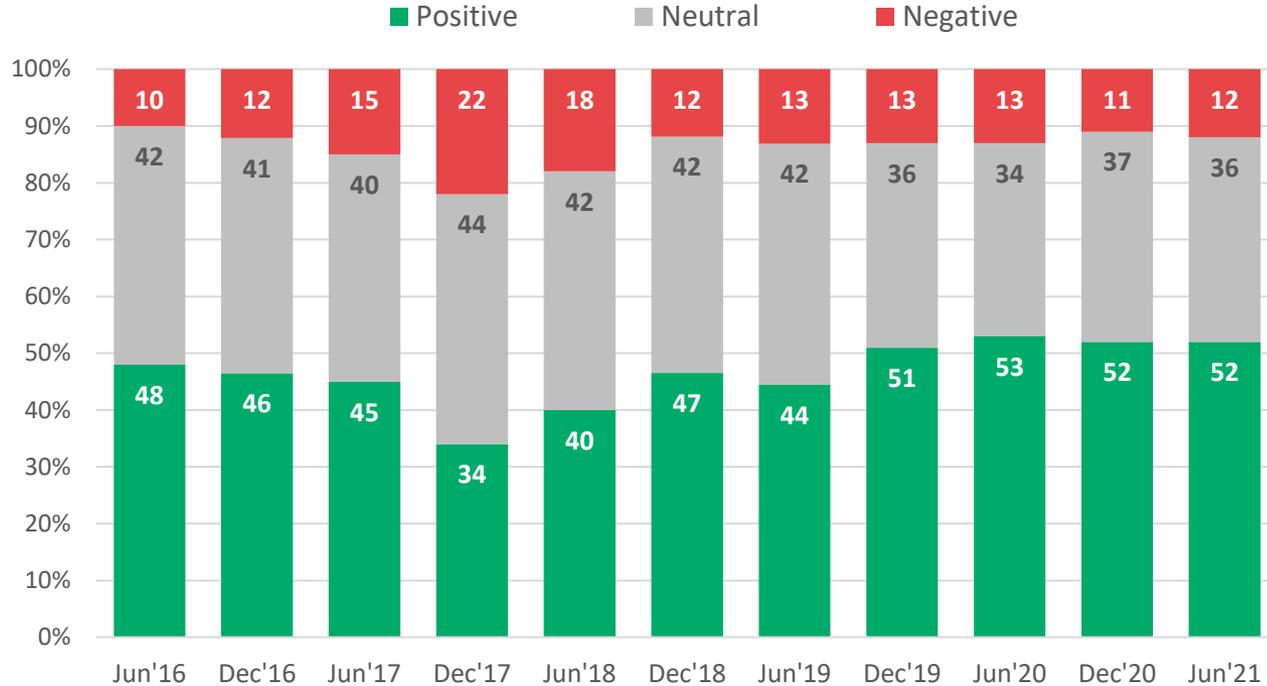
Base size: All households (n= 2,274)

Base size: All businesses (n=551)

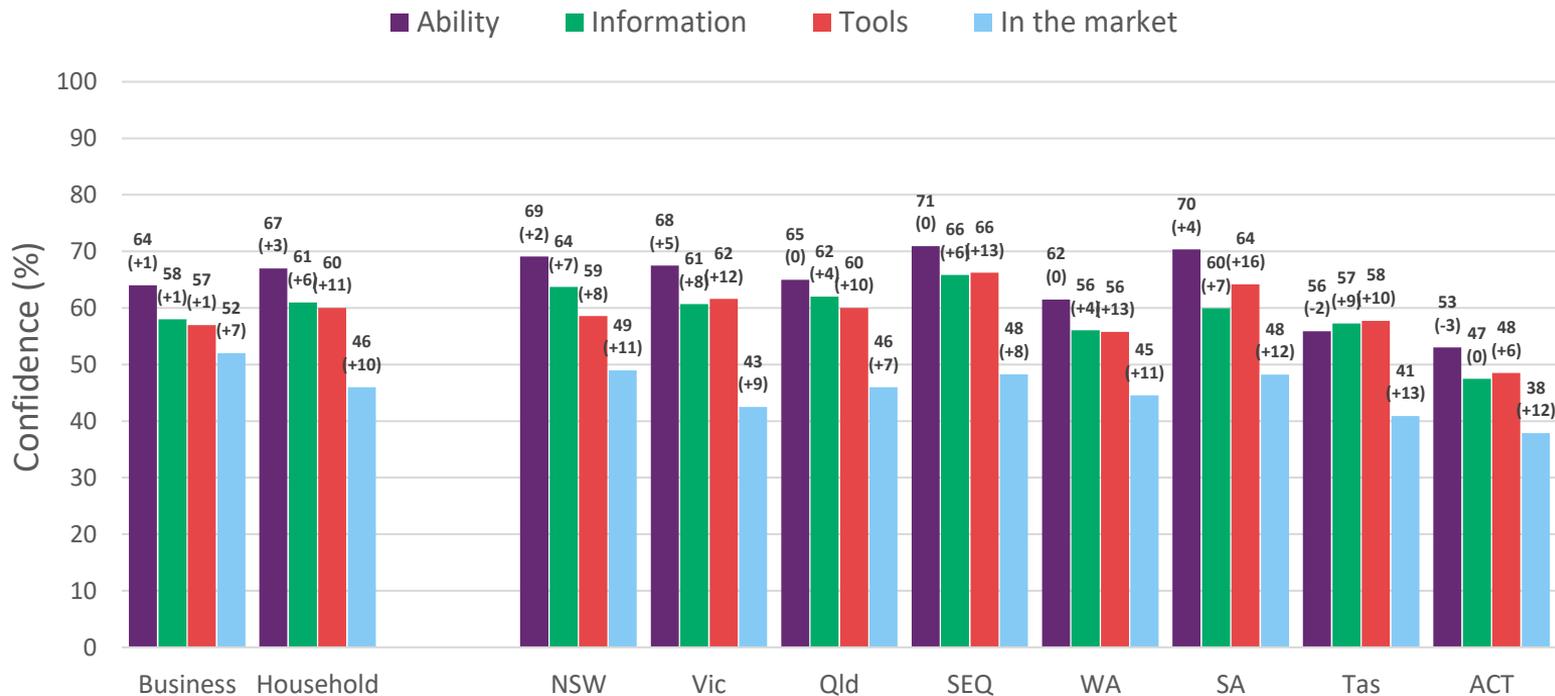
Confidence in advances in technology



Confidence in advances in technology



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,

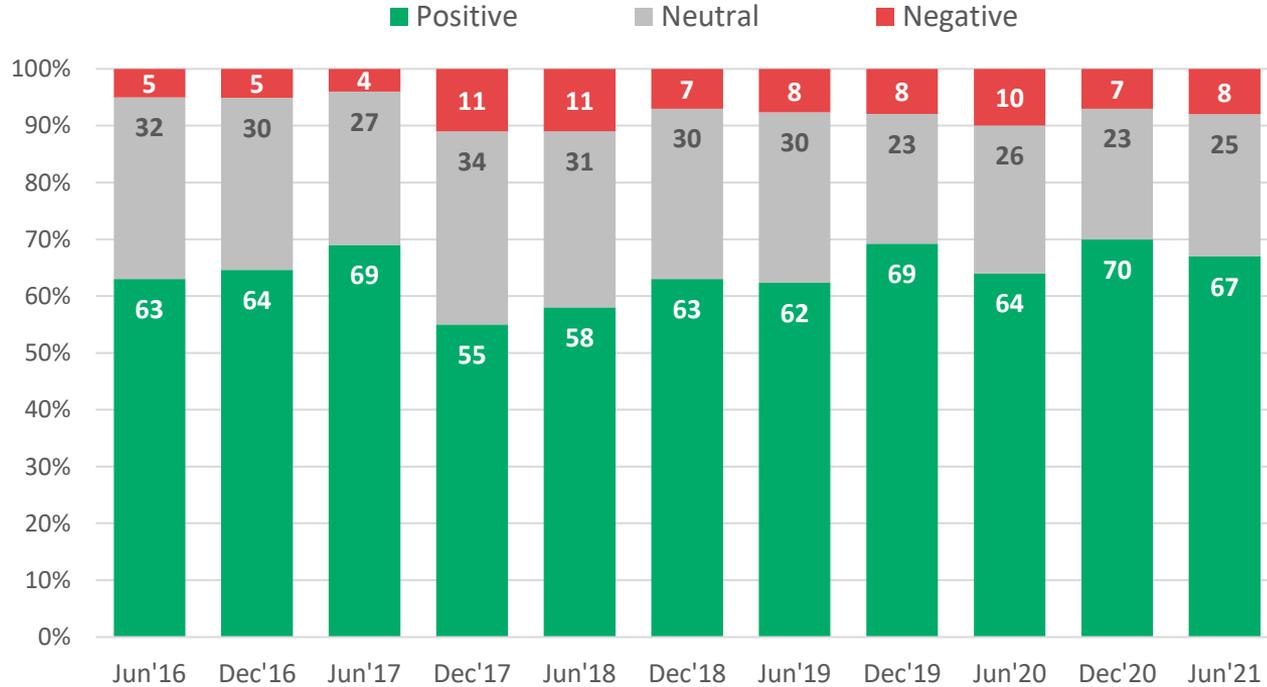
That there is enough easily understood information available to you to make decisions about energy products and services, by which we mean information available on the internet, through energy comparison websites or elsewhere

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

Base size: All households (n= 2,274)

Base size: All businesses (n=551)

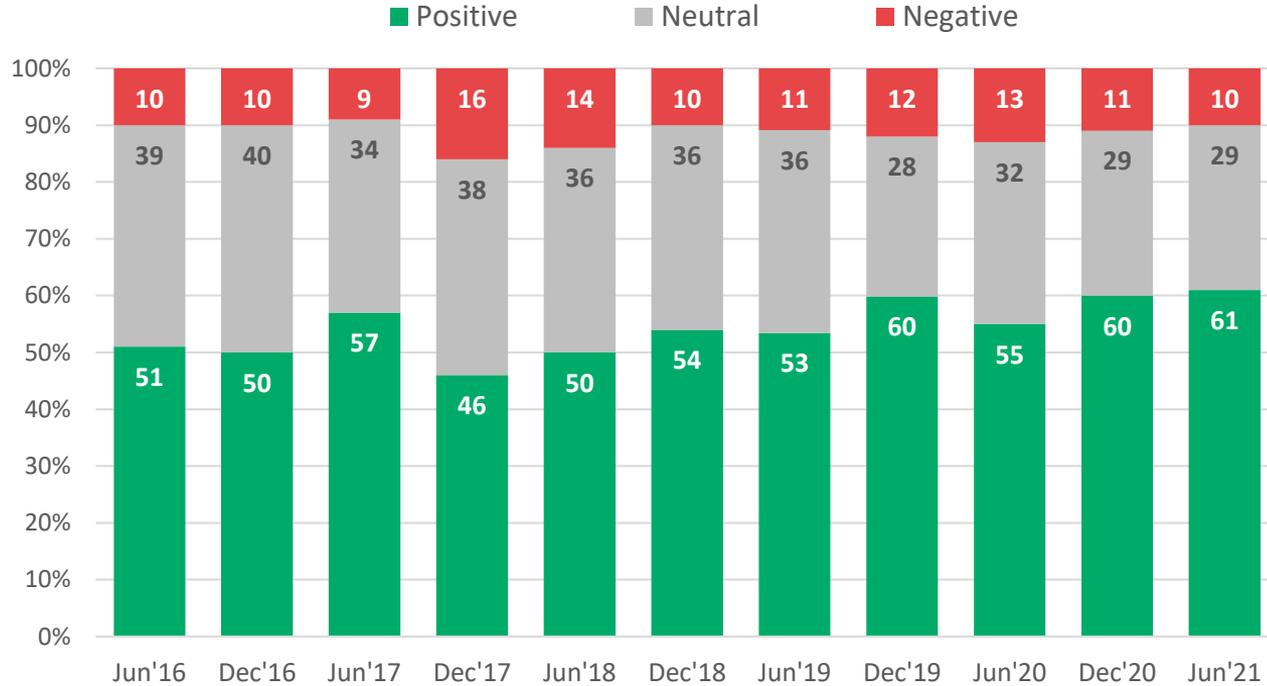
Confidence in ability to make choices



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)

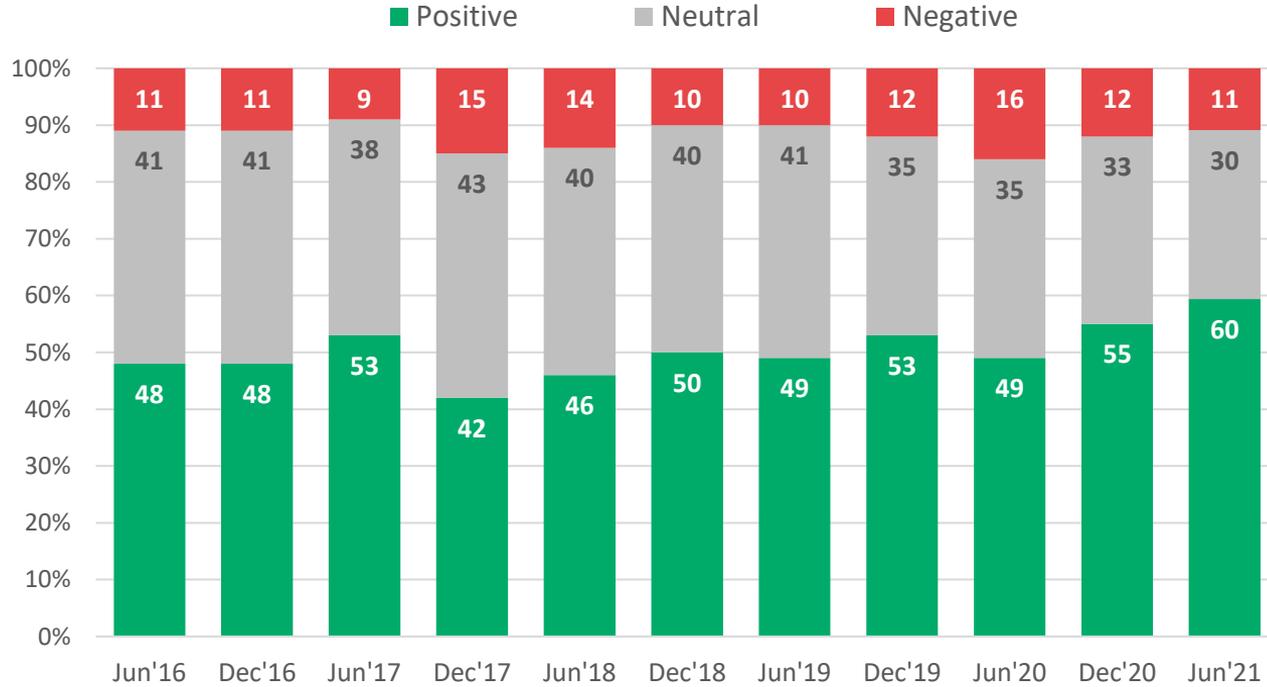
Confidence in availability of enough easily understood information



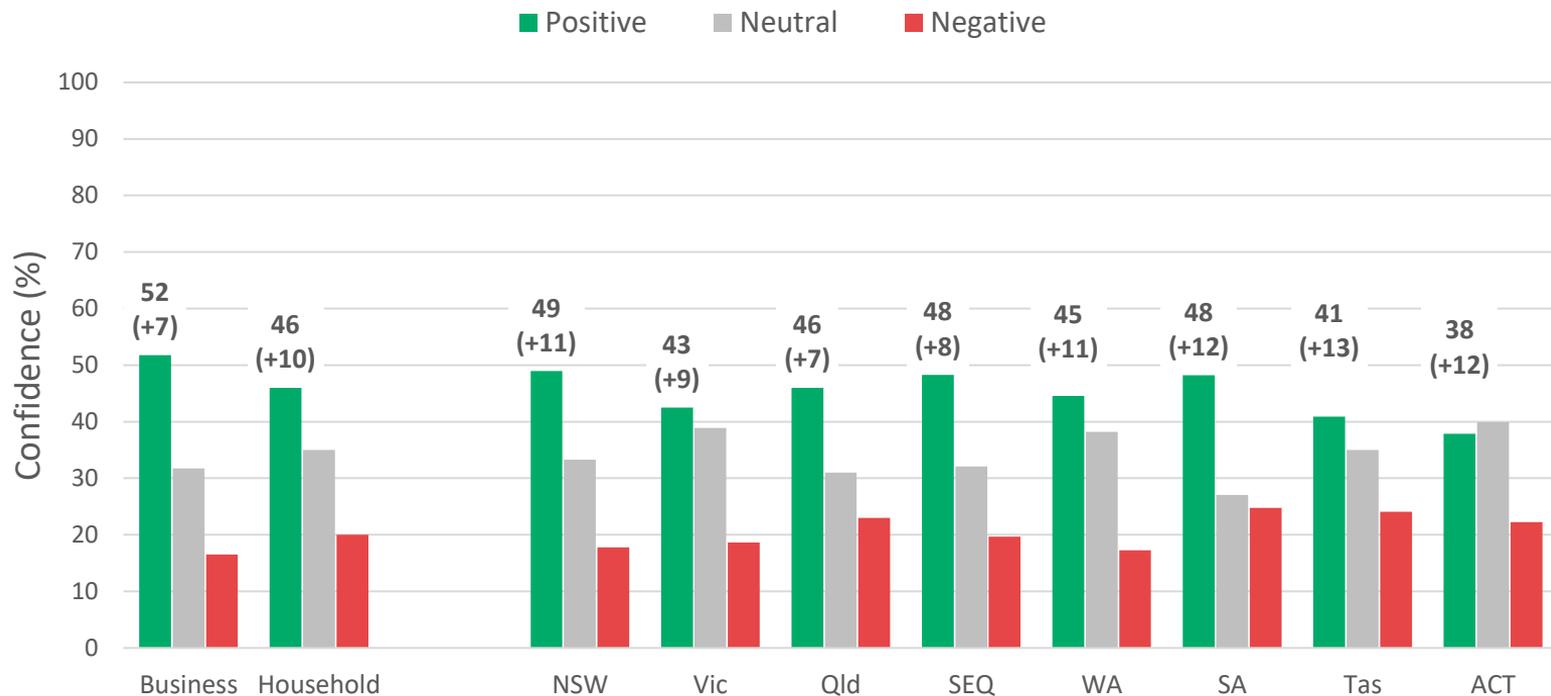
Q: How confident do you feel in the following...? **That there is enough easily understood information available to you to make decisions about energy products and services, by which we mean information available on the internet, through energy comparison websites or elsewhere**

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

Confidence in availability of tools



Confidence in the market

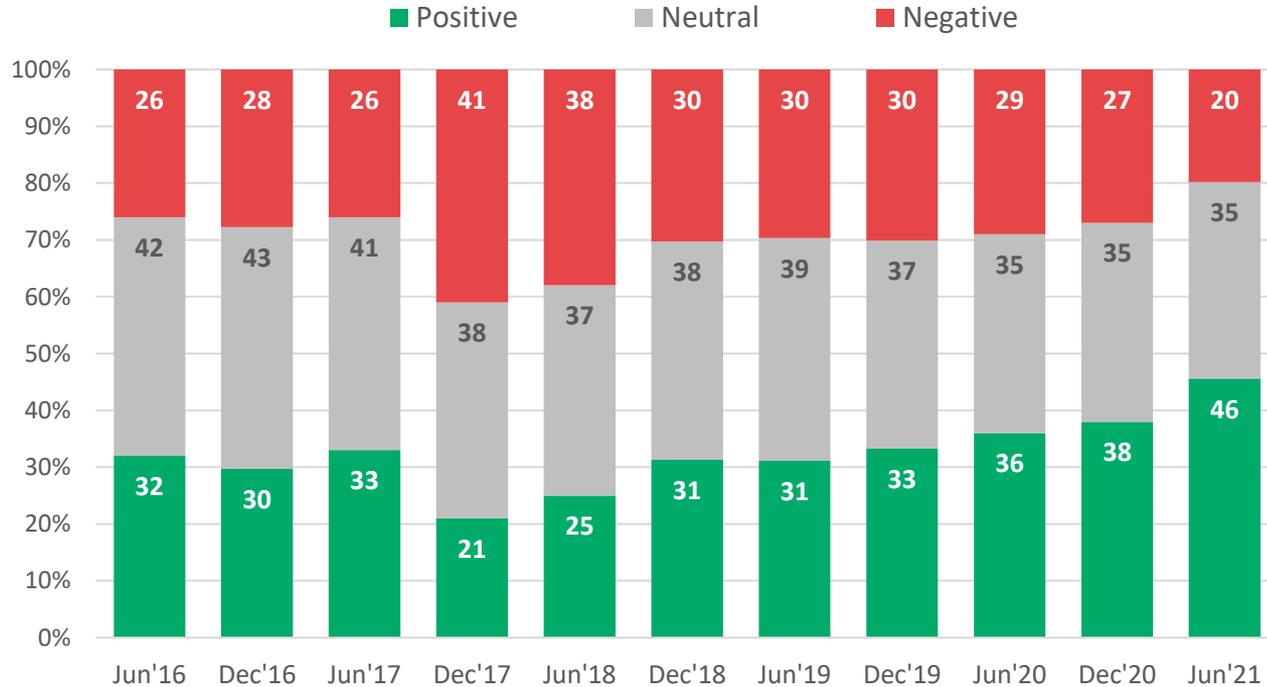


Q: How confident are you that the overall market is working in your long-term interests? By 'the market' we mean, the energy industry and energy regulators.

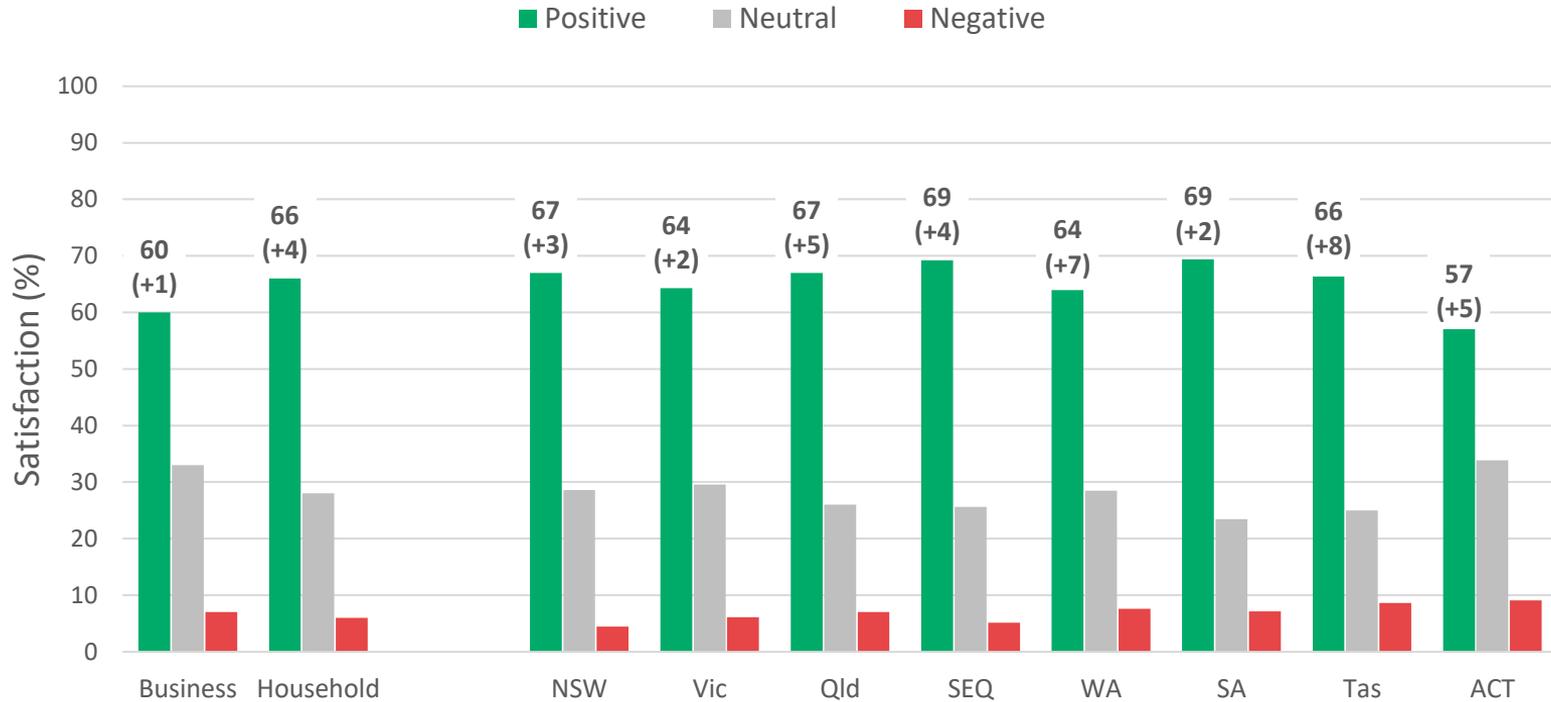
Base size: All households (n= 2,274)

Base size: All businesses (n=551)

Confidence in the market



Confidence in ability to have problems resolved

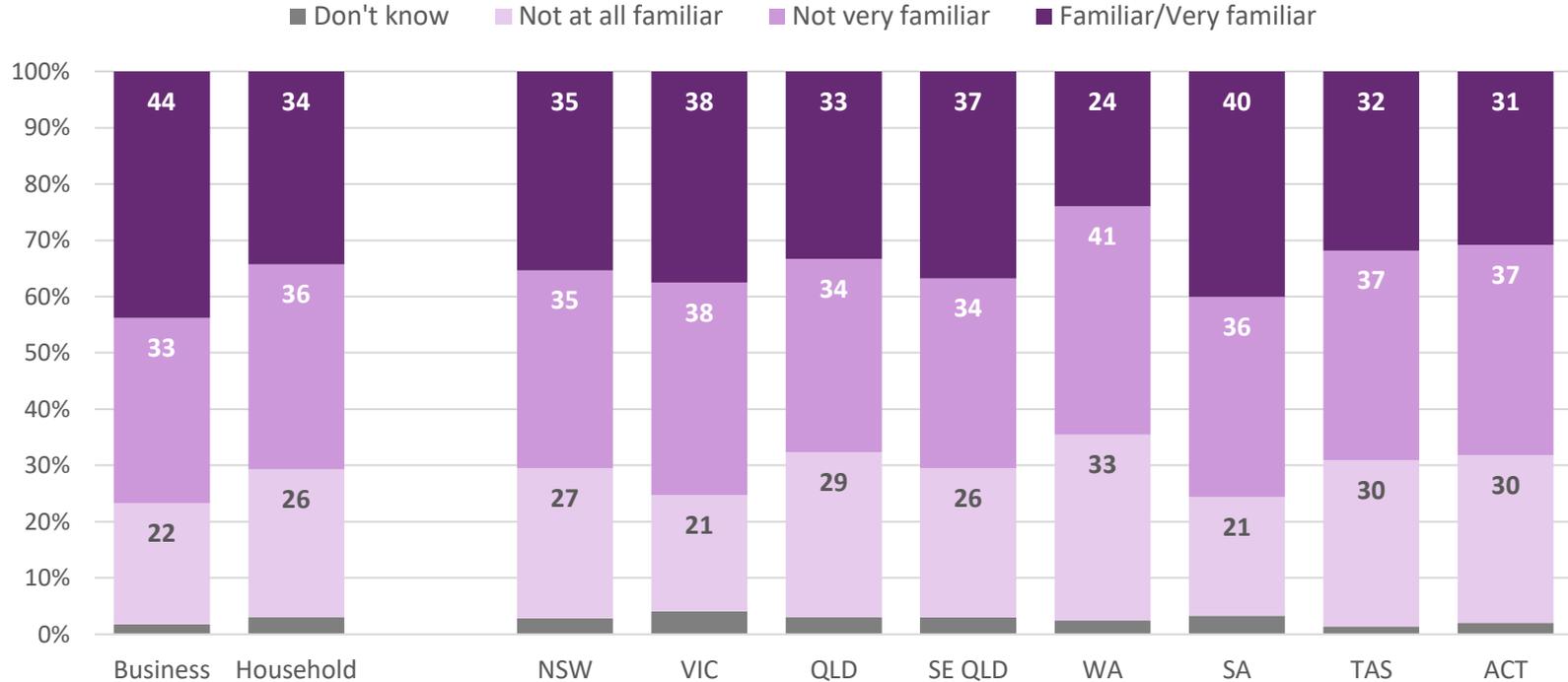


Q: How confident do you feel in the following...? **Your ability to get a problem with your energy services resolved...? through your energy company or a third party**

Base size: All households (n= 2,274)

Base size: All businesses (n=551)

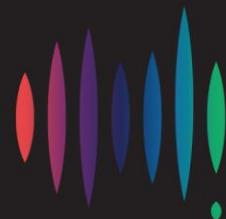
Familiarity with Ombudsman services



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

Base size: All households (n= 2,274)

Base size: All businesses (n=551)



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