

# ENERGY CONSUMER SENTIMENT SURVEY

National trends, Households  
June 2020



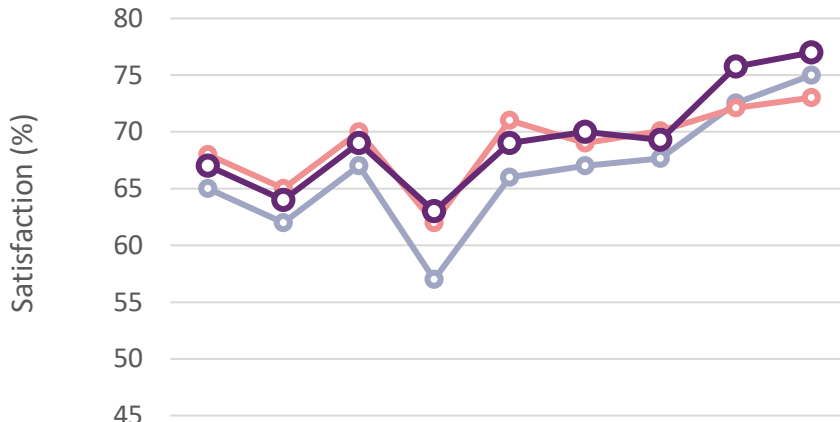
# Satisfaction

- Household overall satisfaction with gas and electricity services, continues to increase from the December 2017 low (now 77% up from 63%).
- Satisfaction increased in all markets (except Western Australia, unchanged) from June 2019.
- Satisfaction with the level of competition is now at 55% (up 8% from June 2019), broadly continuing to increase from December 2017.



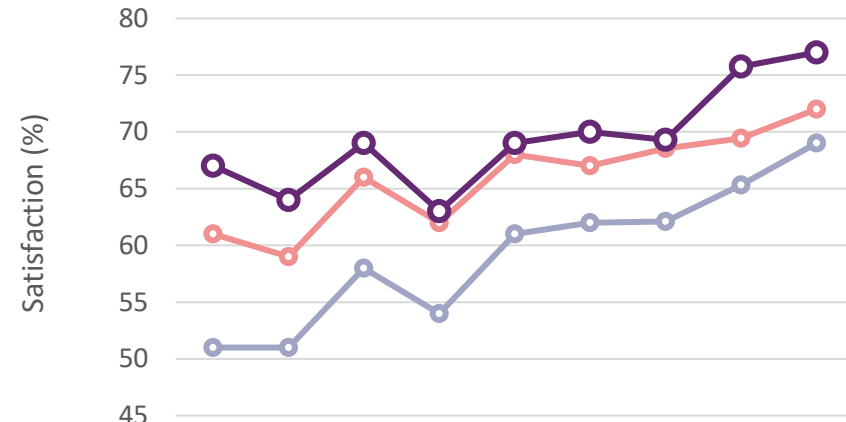
# Household satisfaction with retailer measures

## Household Satisfaction - Gas



	Jun'16	Dec'16	Jun'17	Dec'17	Jun'18	Dec'18	Jun'19	Dec'19	Jun'20
Customer Service	65	62	67	57	66	67	68	73	75
Billing	68	65	70	62	71	69	70	72	73
Overall Satisfaction	67	64	69	63	69	70	69	76	77

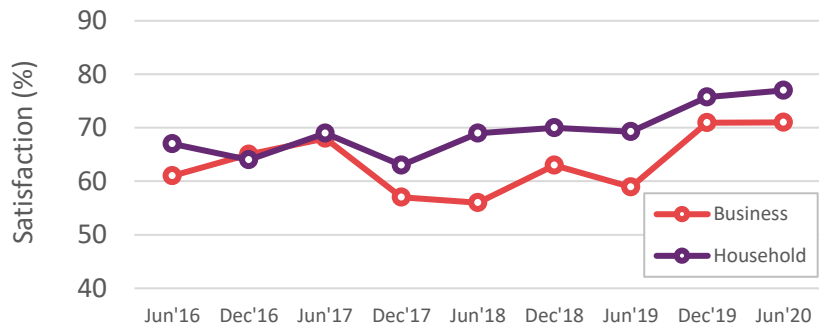
## Household Satisfaction - Electricity



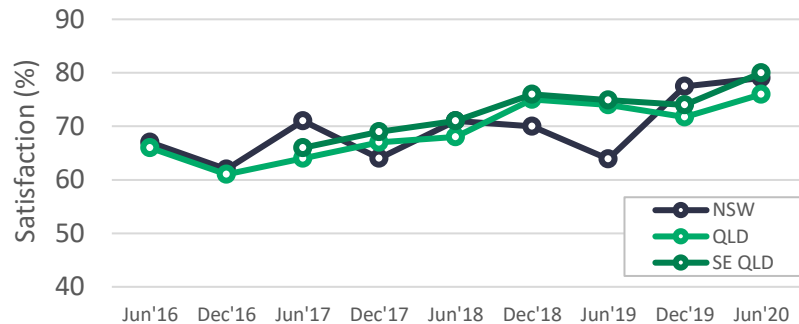
	Jun'16	Dec'16	Jun'17	Dec'17	Jun'18	Dec'18	Jun'19	Dec'19	Jun'20
Customer Service	51	51	58	54	61	62	62	65	69
Billing	61	59	66	62	68	67	69	69	72
Overall Satisfaction	67	64	69	63	69	70	69	76	77

# Overall satisfaction with energy services (Household)

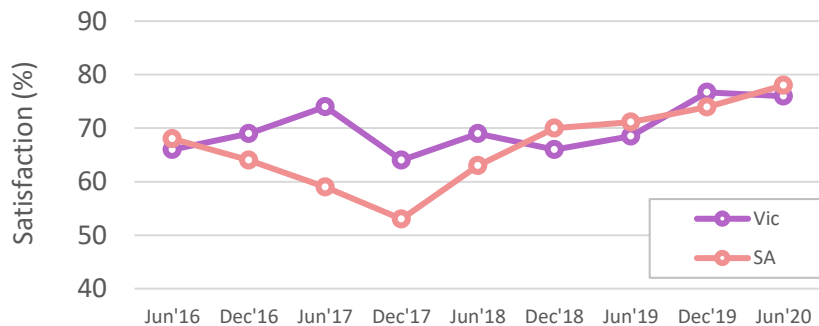
## Overall Satisfaction - Business & Household



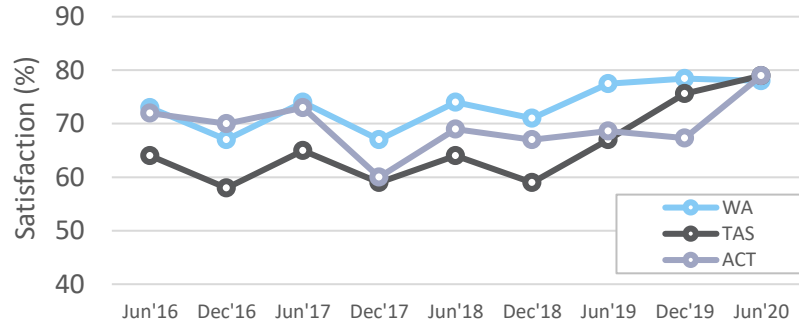
## Overall Satisfaction - NSW, QLD & SE QLD



## Overall Satisfaction - Victoria & SA



## Overall Satisfaction - WA, TAS & ACT



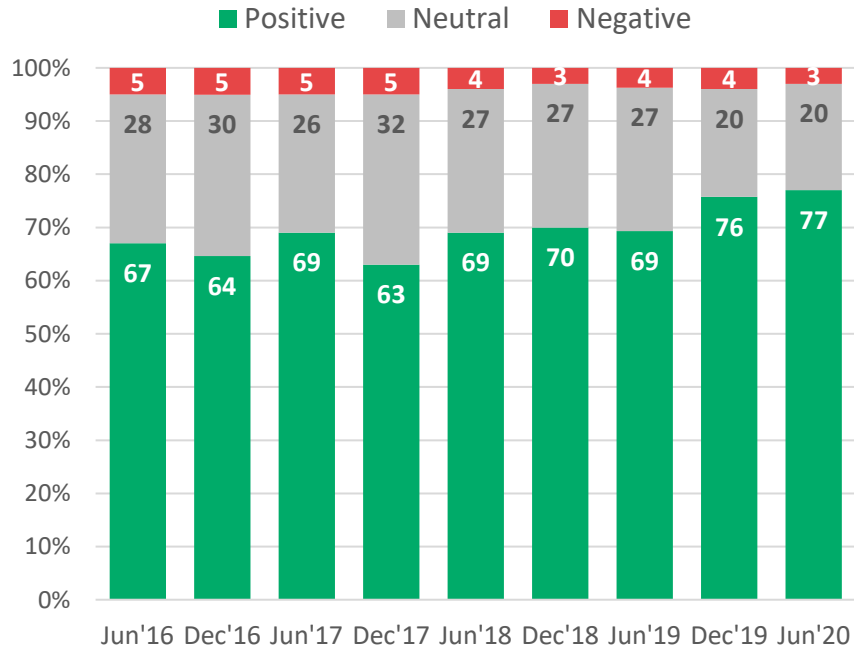
# Overall satisfaction with energy services (Household)

## Overall Satisfaction

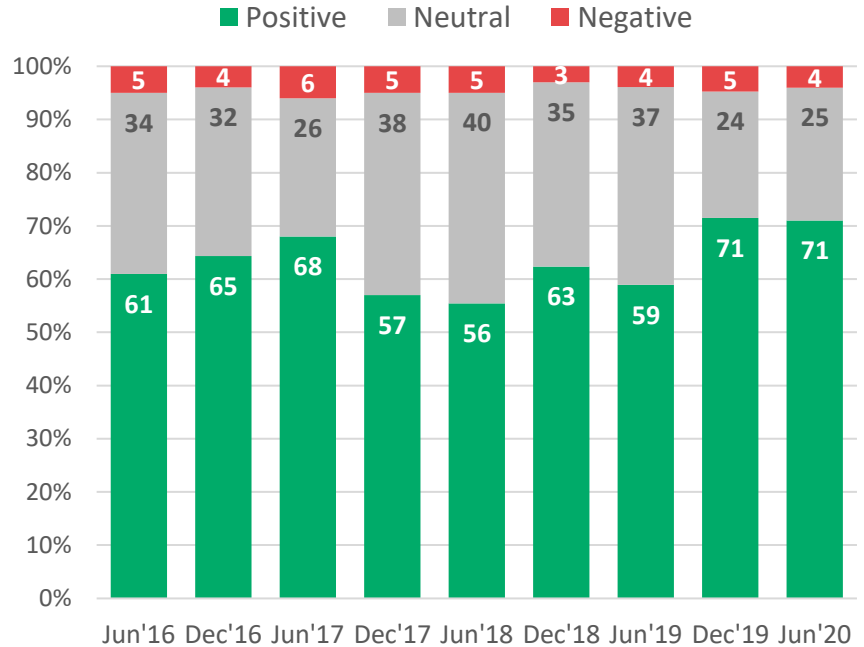
	Jun'20	Dec'19	Jun'19	Dec'18	Jun'18	Dec'17	Jun'17	Dec'16	Jun'16
Business	71%	71%	59%	63%	56%	57%	68%	65%	61%
Household	77%	76%	69%	70%	69%	63%	69%	64%	67%
NSW	79%	77%	64%	70%	71%	64%	71%	62%	67%
Victoria	76%	77%	69%	66%	69%	64%	74%	69%	66%
Queensland	76%	72%	74%	75%	68%	67%	64%	61%	66%
SE Queensland	80%	74%	75%	76%	71%	69%	66%	-	-
Western Australia	78%	78%	78%	71%	74%	67%	74%	67%	73%
South Australia	78%	74%	71%	70%	63%	53%	59%	64%	68%
Tasmania	79%	76%	67%	59%	64%	59%	65%	58%	64%
ACT	79%	67%	69%	67%	69%	60%	73%	70%	72%

# Overall satisfaction with energy services (Business/Household)

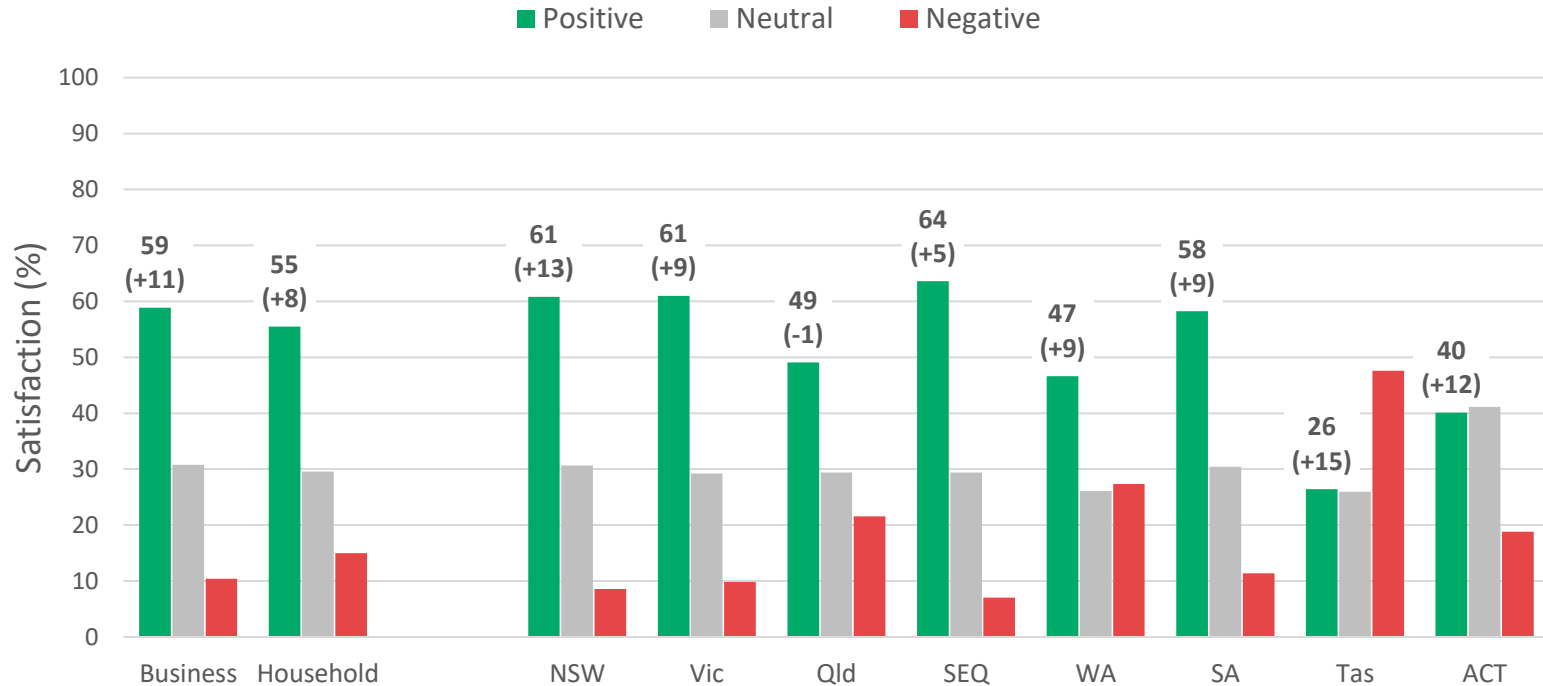
## Overall Satisfaction - Household



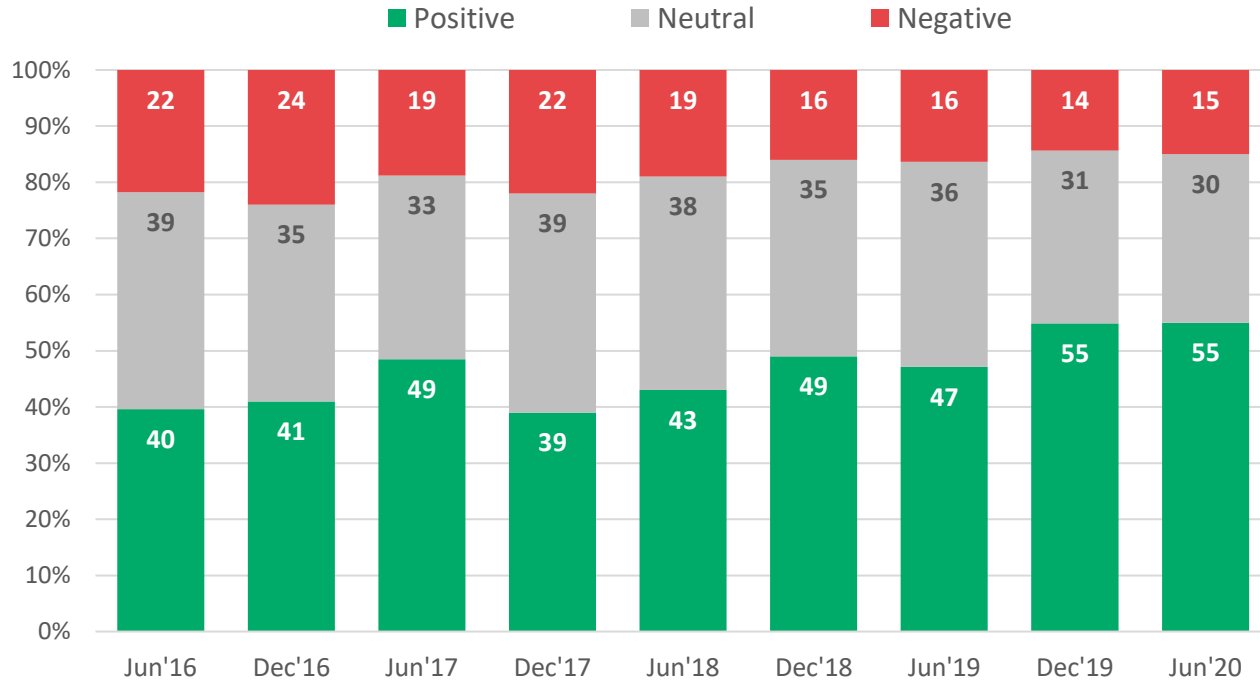
## Overall Satisfaction - Business



# Satisfaction with level of competition



# Satisfaction with level of competition (Household)



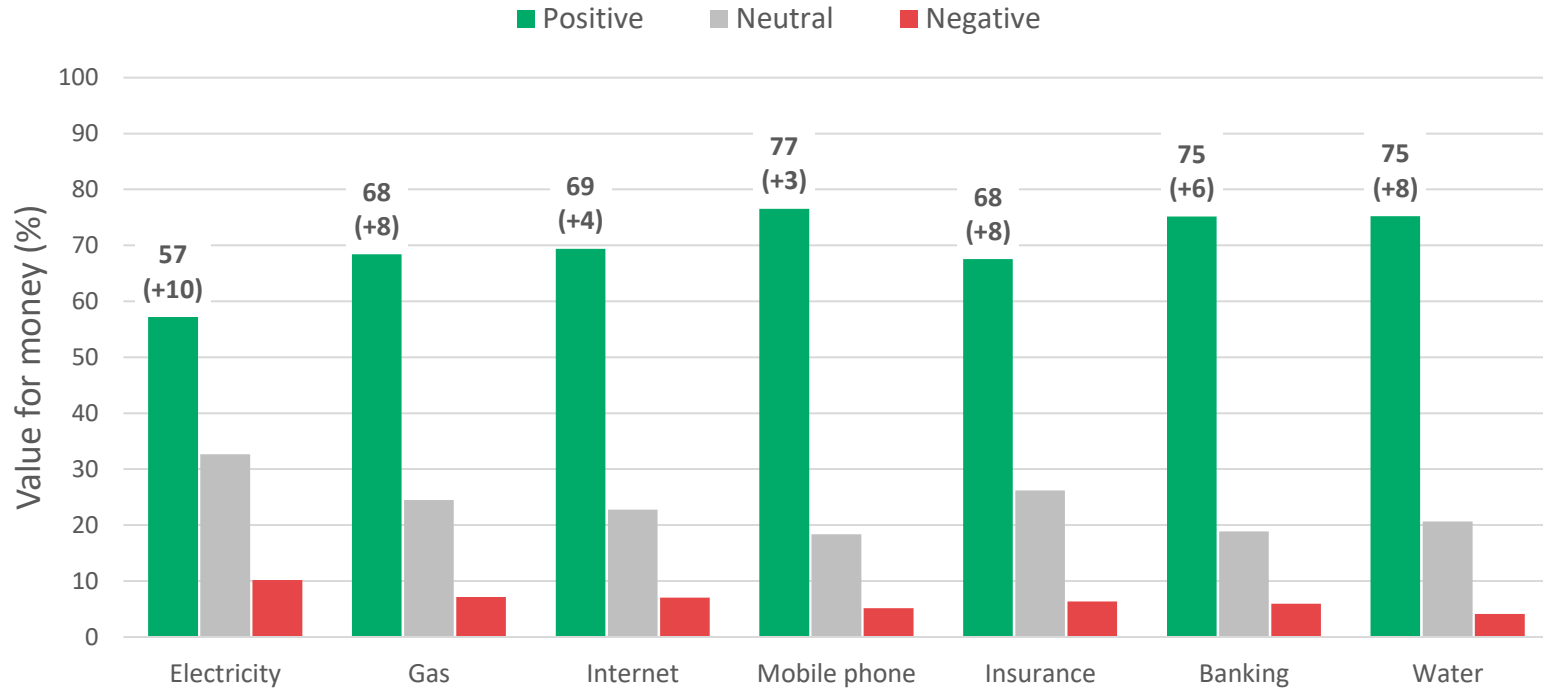


# Value for money & Outages

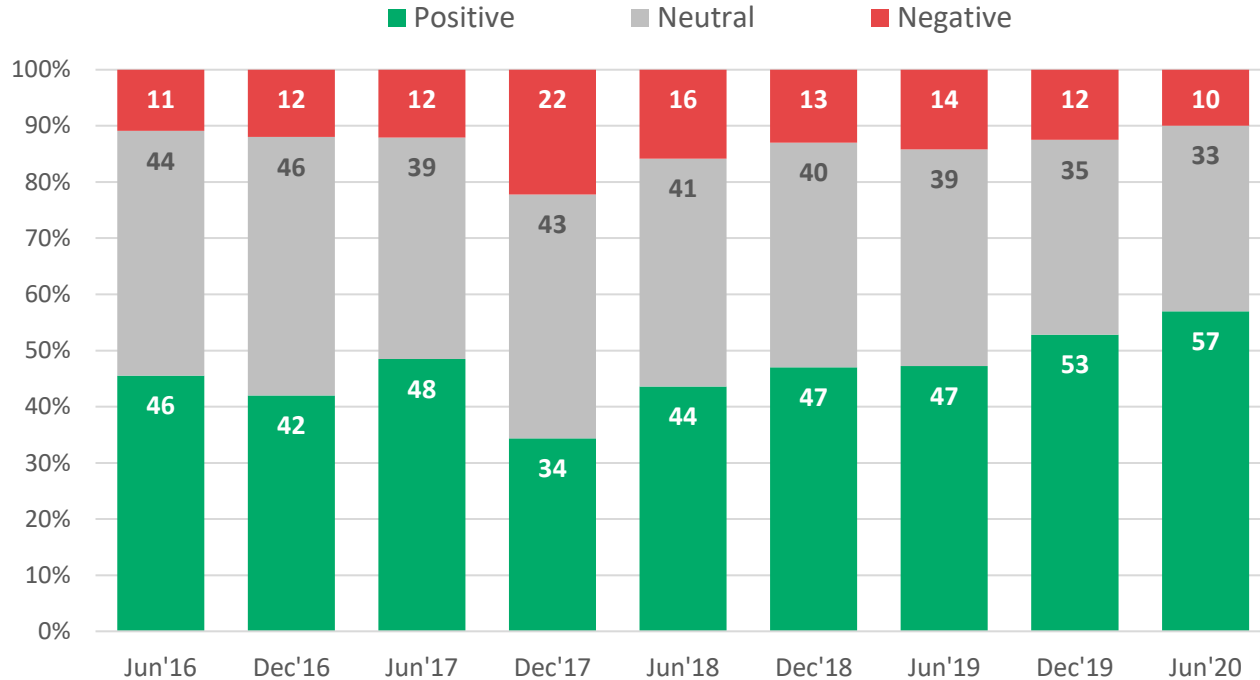
- Value for money of gas services is now at 68%, with households more satisfied with their gas than their internet provider.
- Electricity value for money is still the lowest rated of all comparable services, at 57%, despite a 10% increase from June 2019.
- Satisfaction with electricity reliability is now 72% (up 3%) but Western Australia (down 5%) and Tasmania (down 4%) registering decreases.
- For households who experienced an electrical outage, satisfaction with the duration increased by 1% from June 2019.



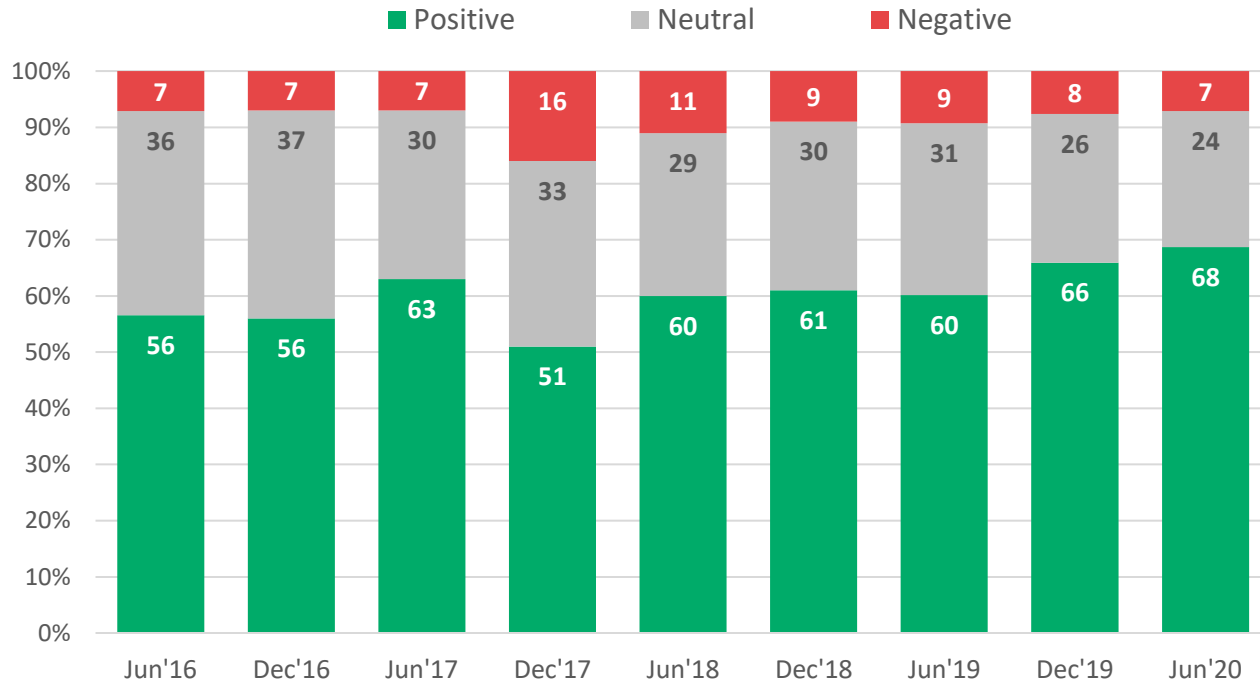
# Value for money of all services (Household)



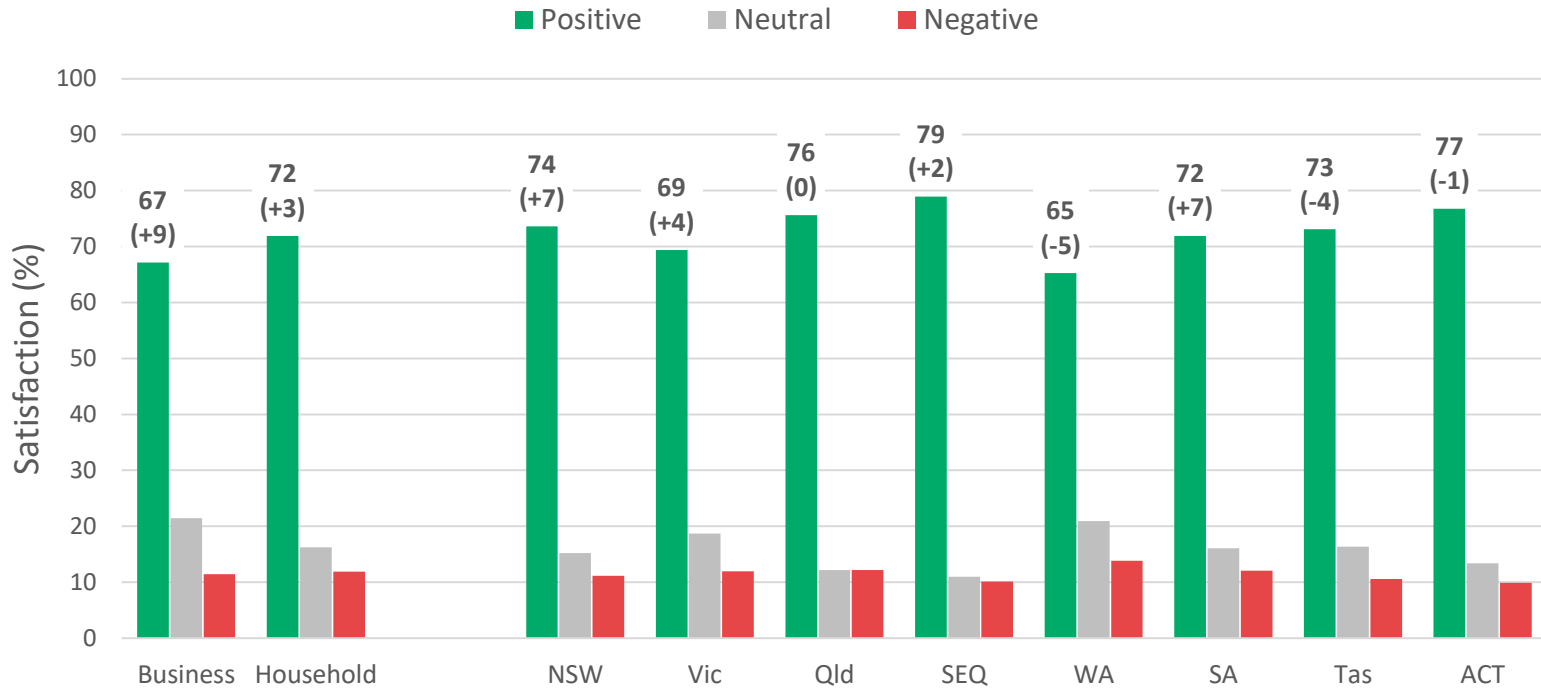
# Value for money of electricity services (Household)



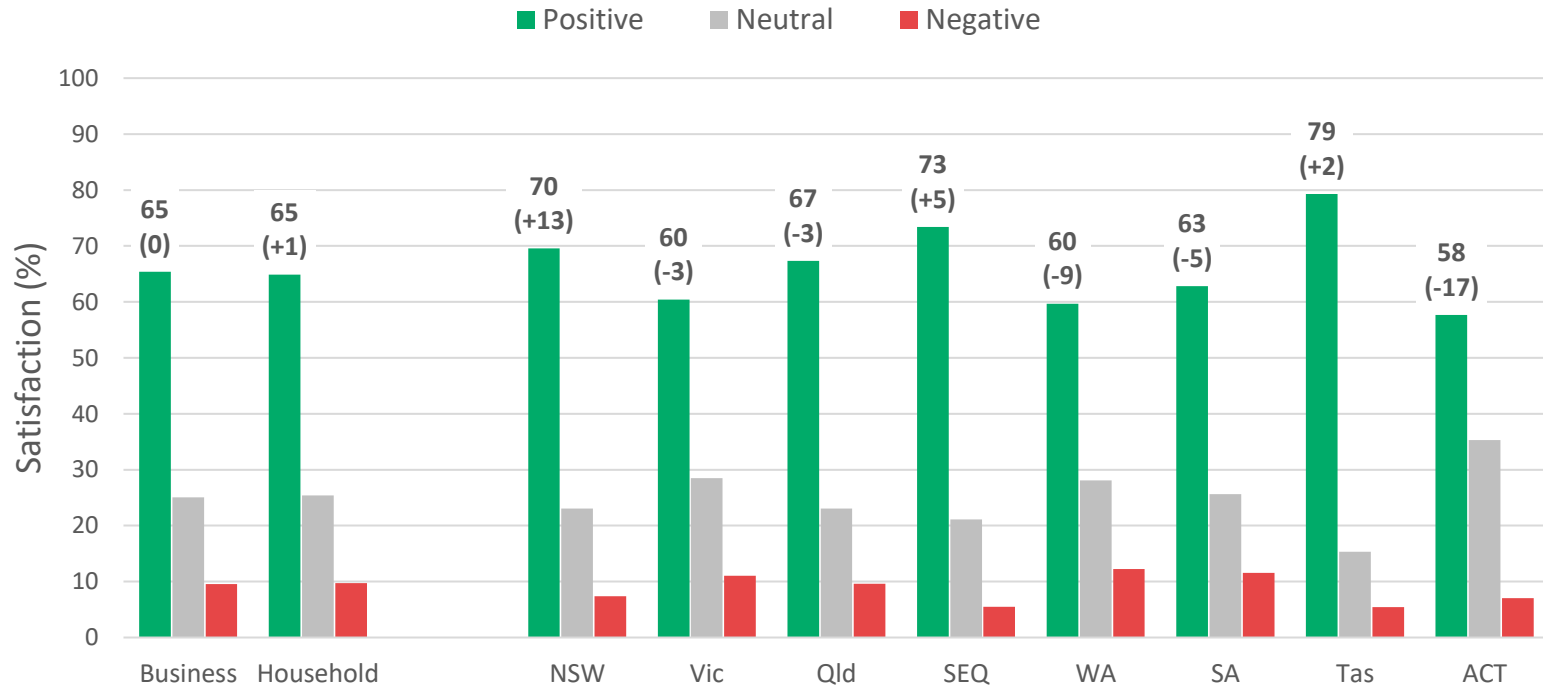
# Value for money of gas services (Household)



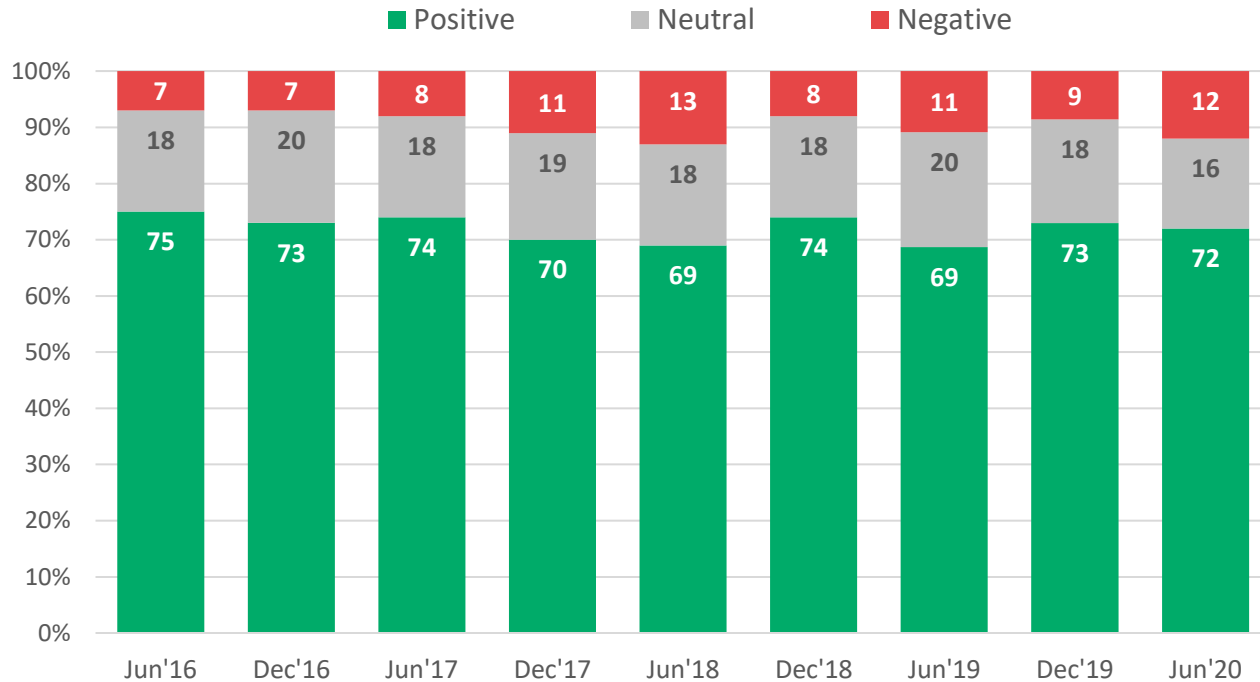
# Satisfaction with number of electricity outages (Household)



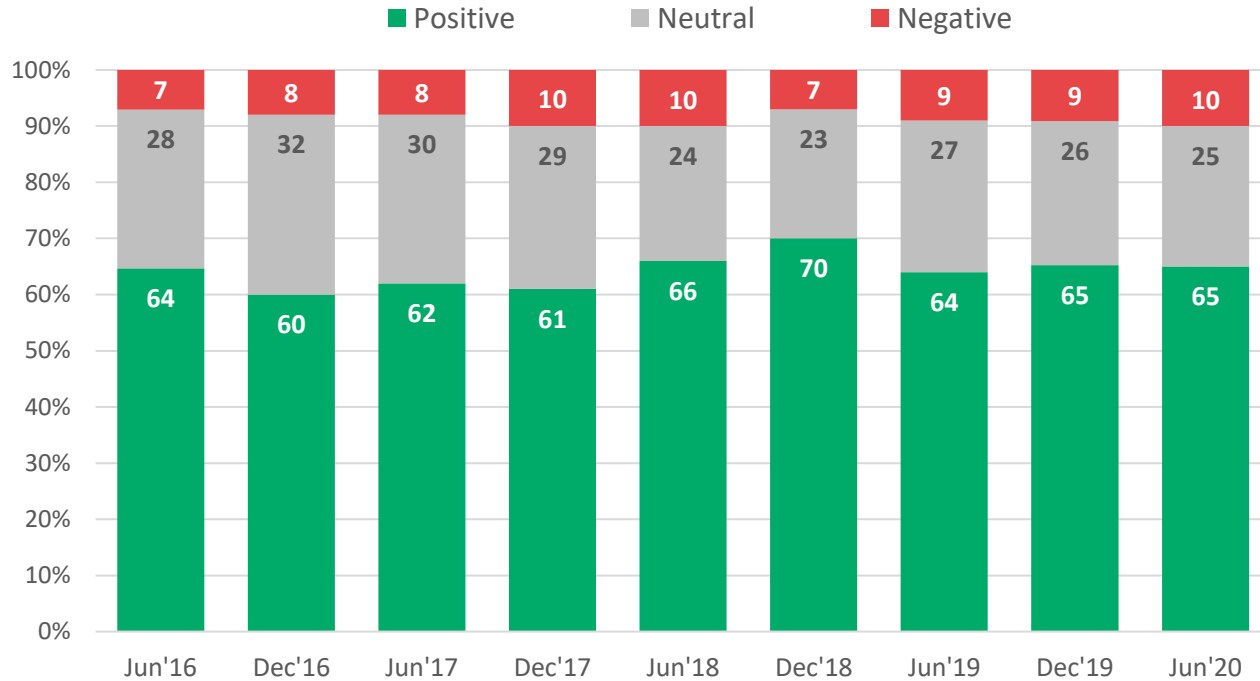
# Satisfaction with duration of electricity outages (Household)



# Satisfaction with number of electricity outages (Household)



# Satisfaction with duration of electricity outages (Household)



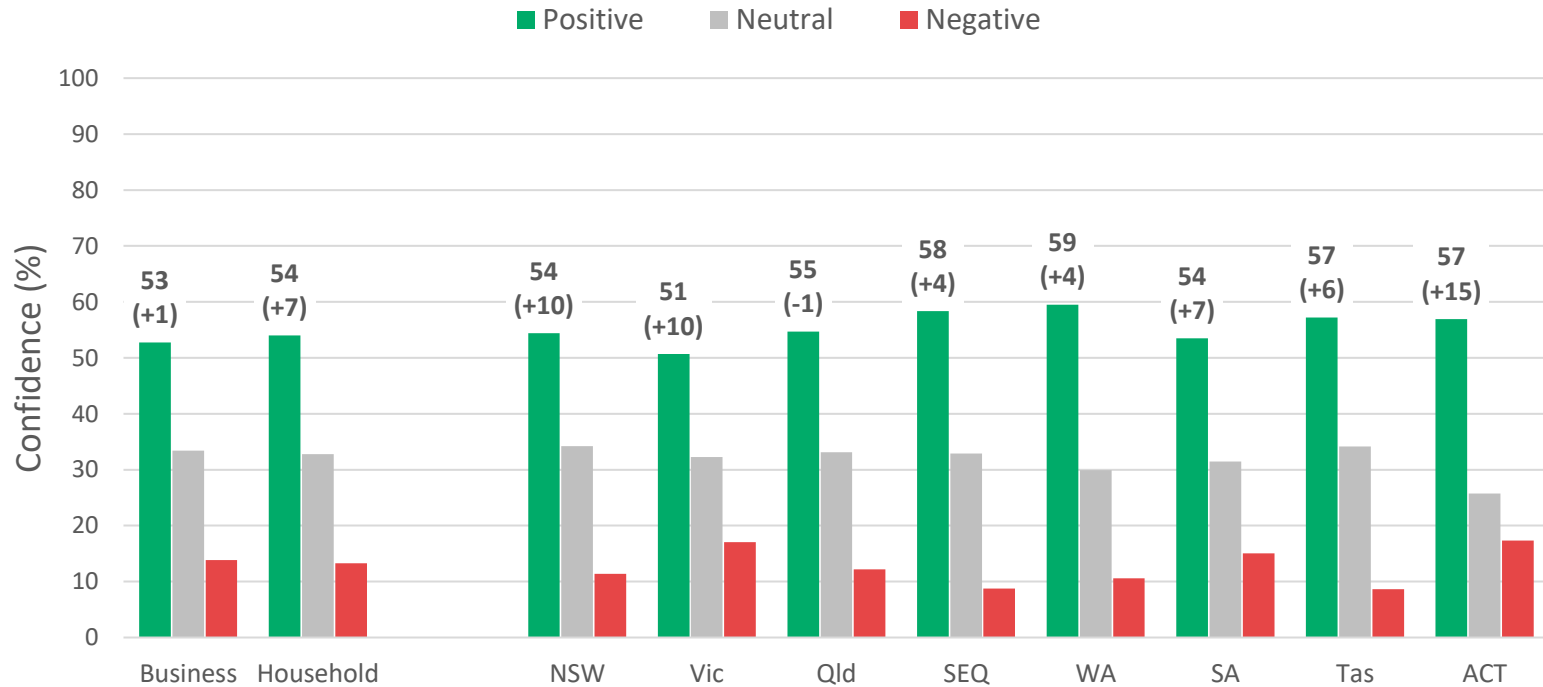


# Household Confidence

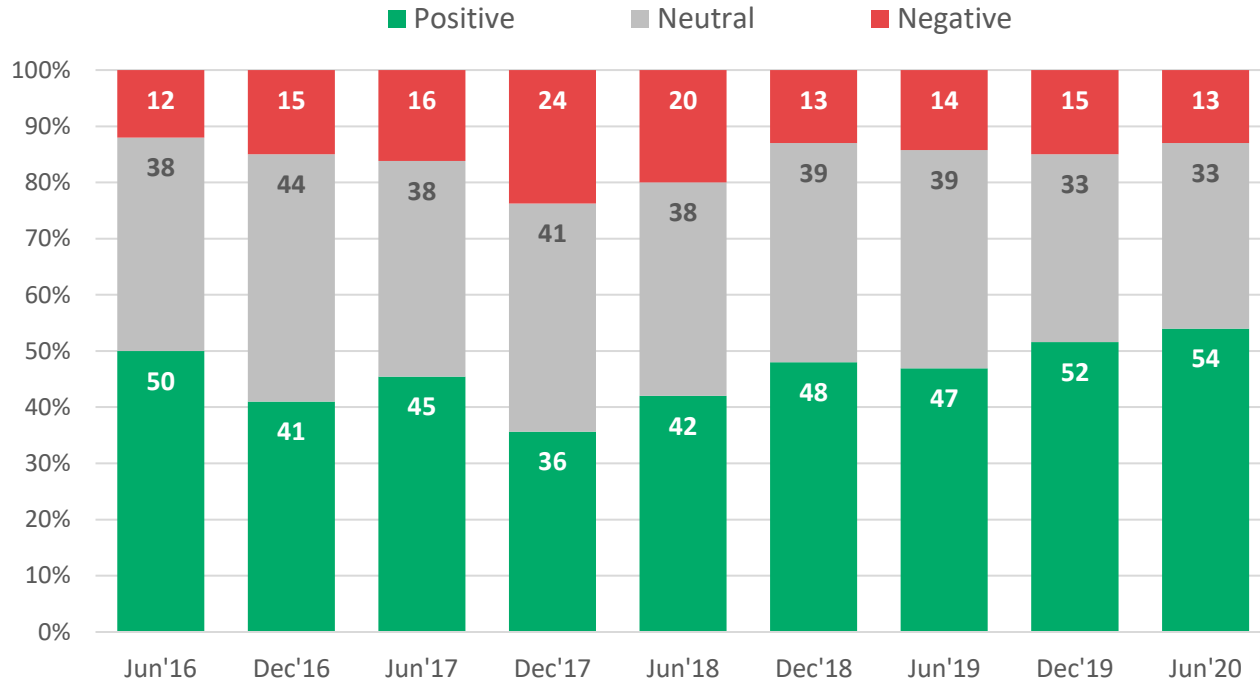
- Household confidence in future reliability and technology advances continues to grow from their respective June 2017 lows (36% and 34% respectively) and is now at 54% and 53%.
- Nearly two-thirds of households are confident in their ability to make choices (now 64%, up 2%).
- Only one-third are confident that the market is working in their long-term interests (now 36% up 5%).
- Confidence in their ability to get problems resolved has decreased across most markets (down 2% overall).
- One-third of households are familiar with the Energy Ombudsman.



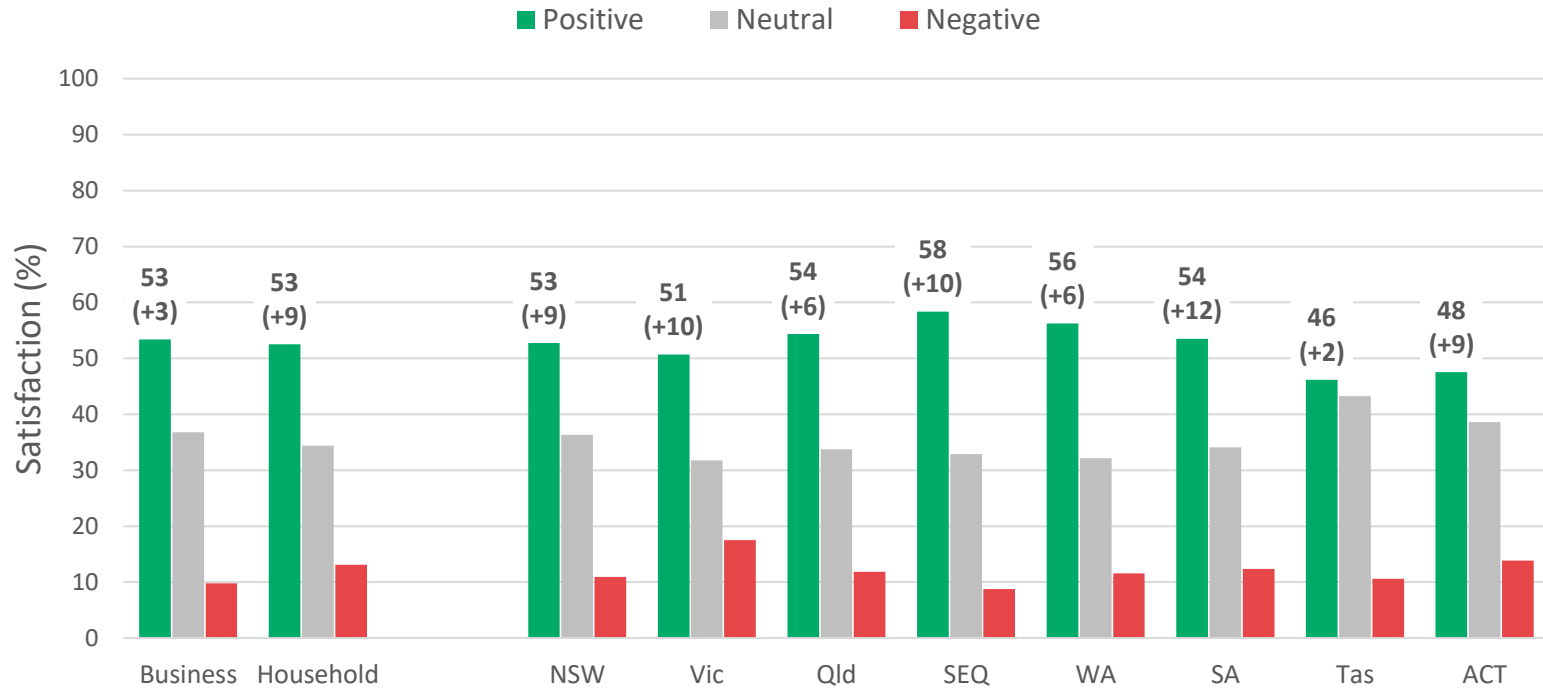
# Confidence in future reliability (Household)



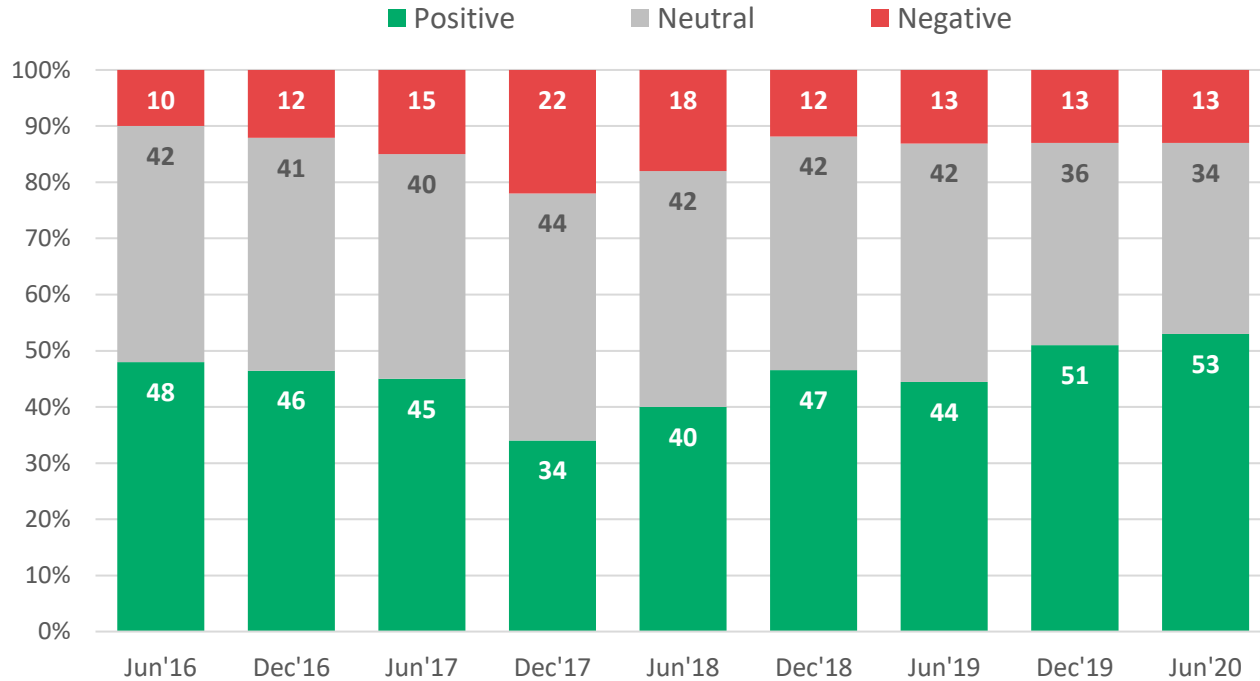
# Confidence in future reliability (Household)



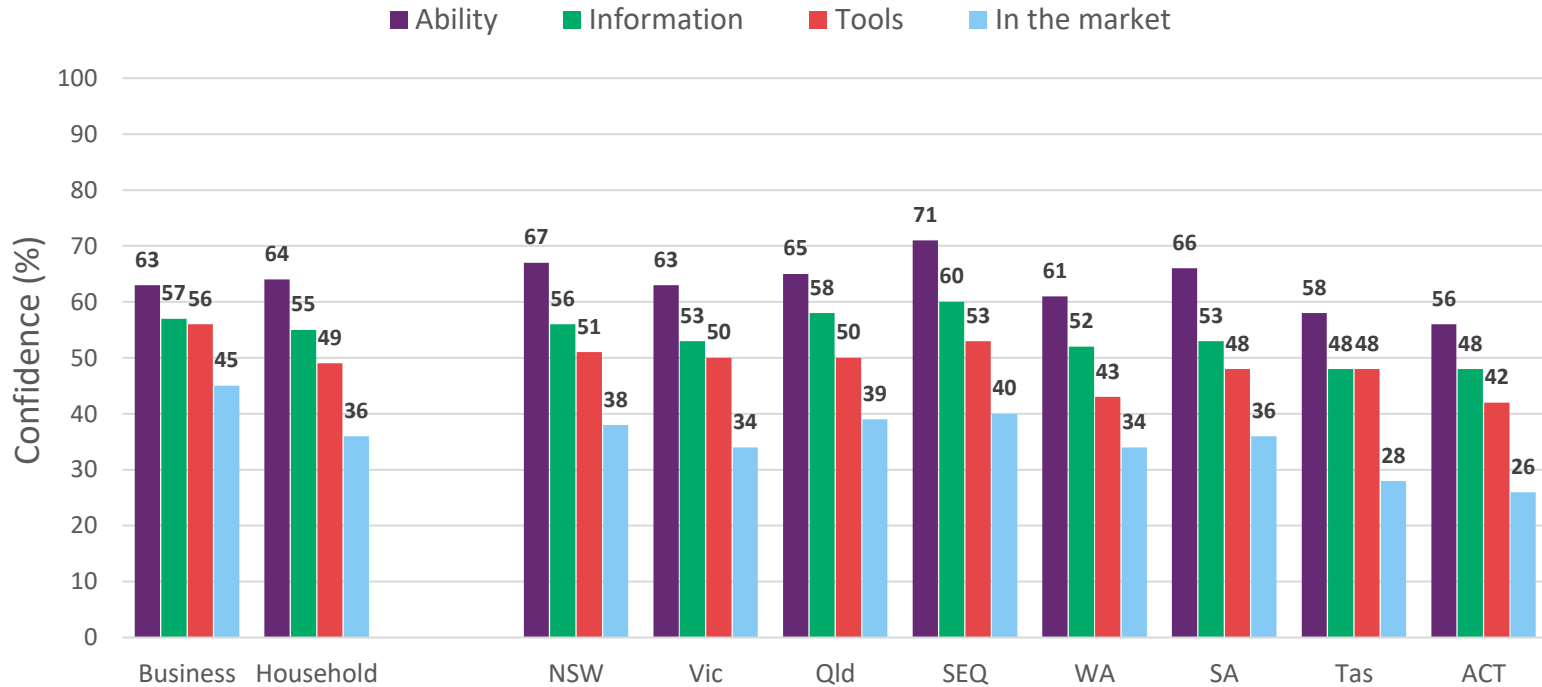
# Confidence in advances in technology (Household)



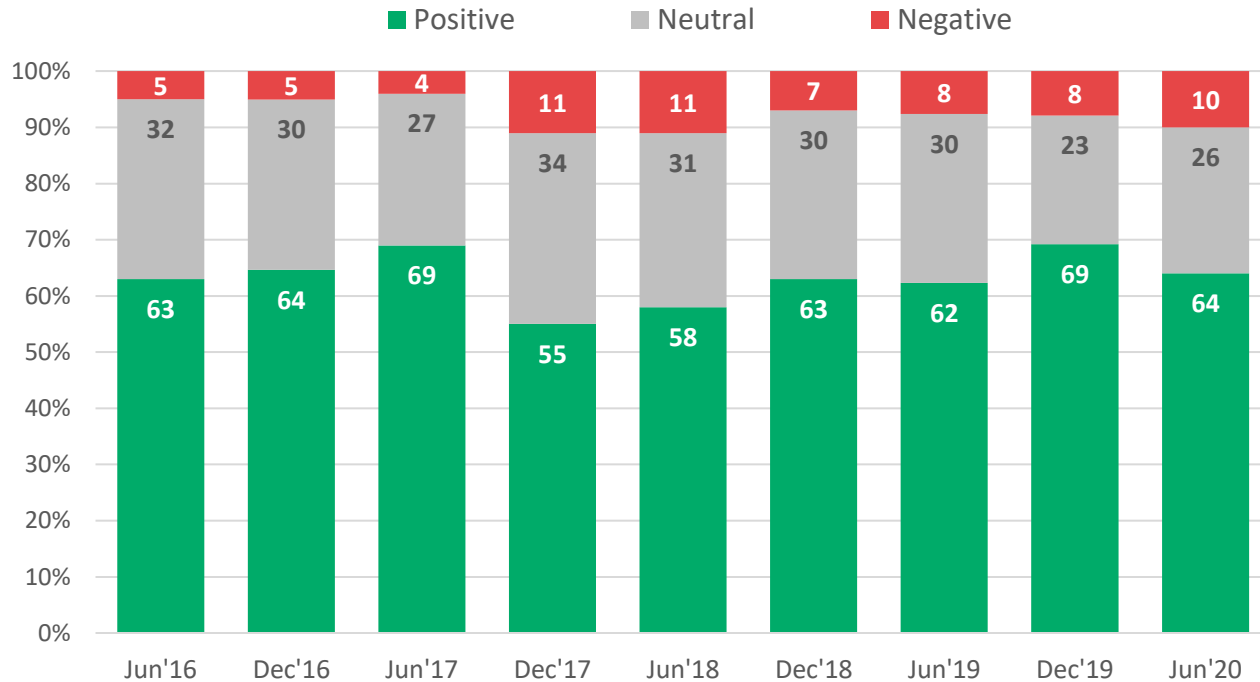
# Confidence in advances in technology (Household)



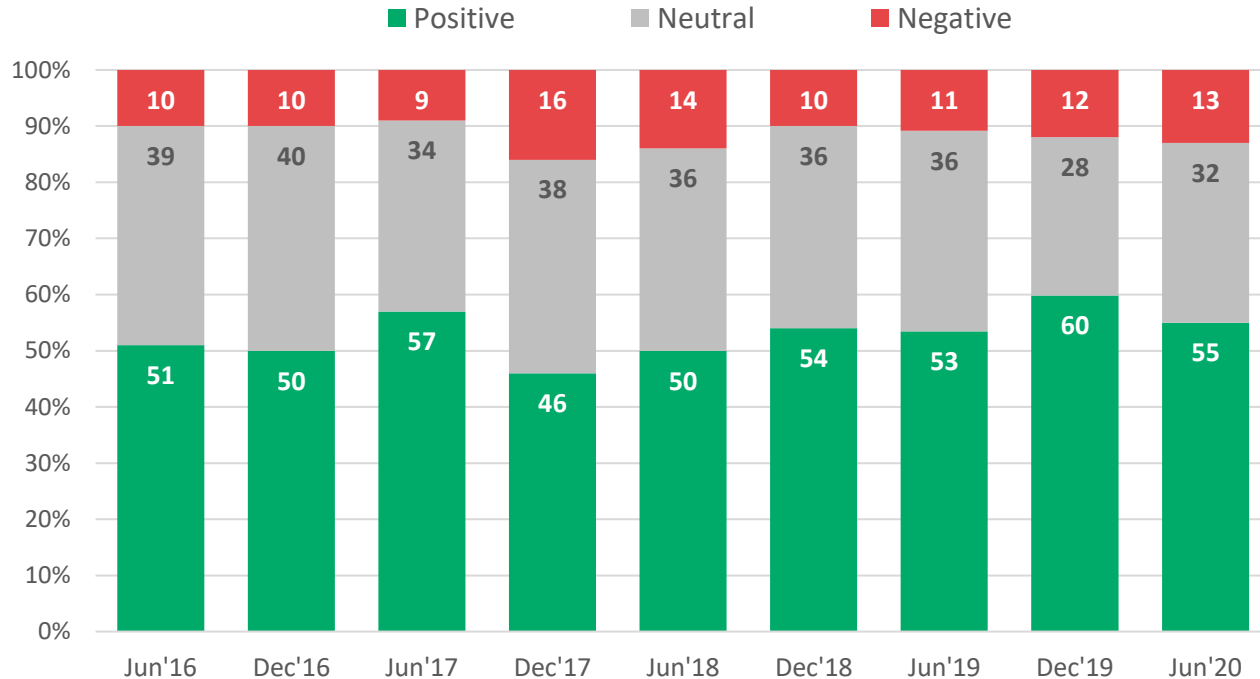
# Confidence in ability, information and tools (Household)



# Confidence in ability to make choices (Household)

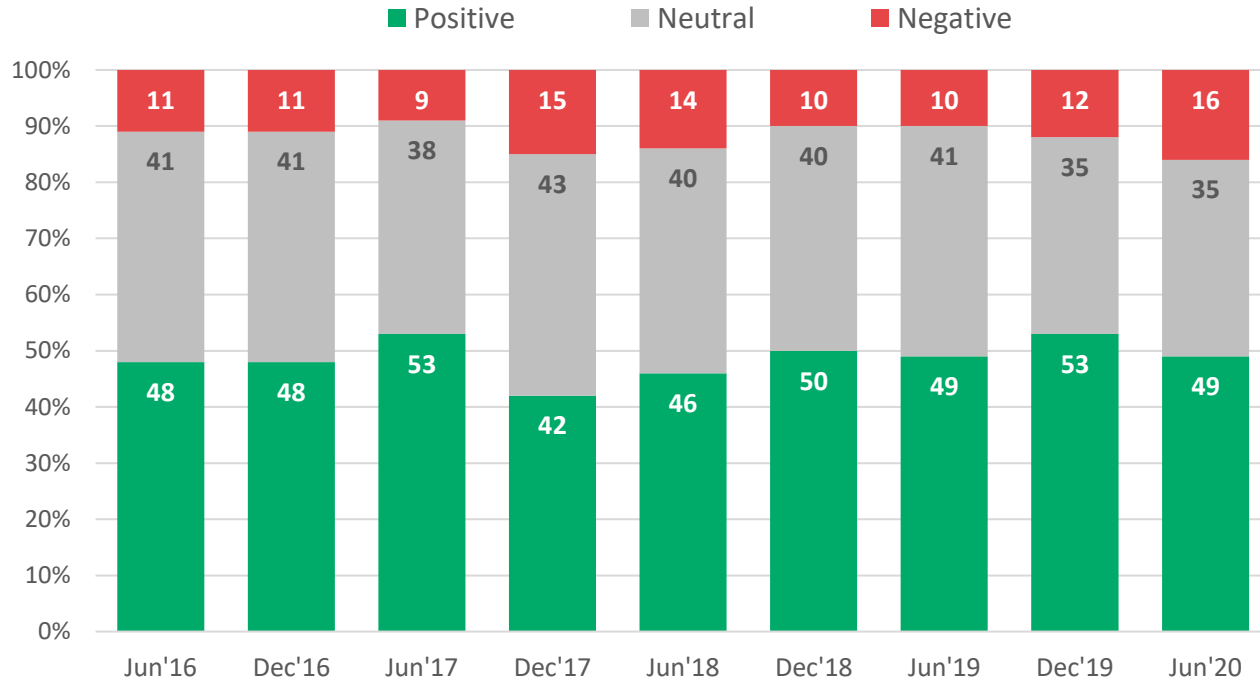


# Confidence in availability of enough easily understood information (Household)

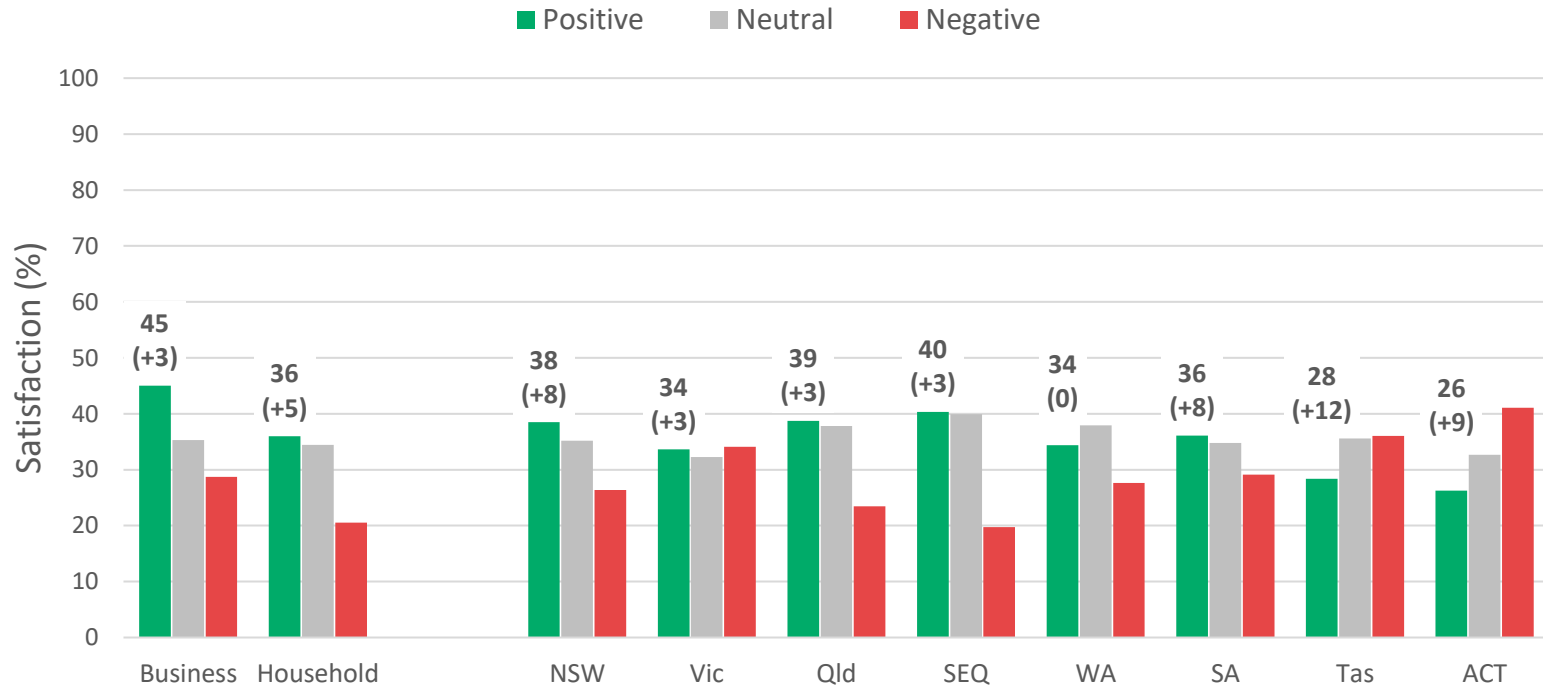




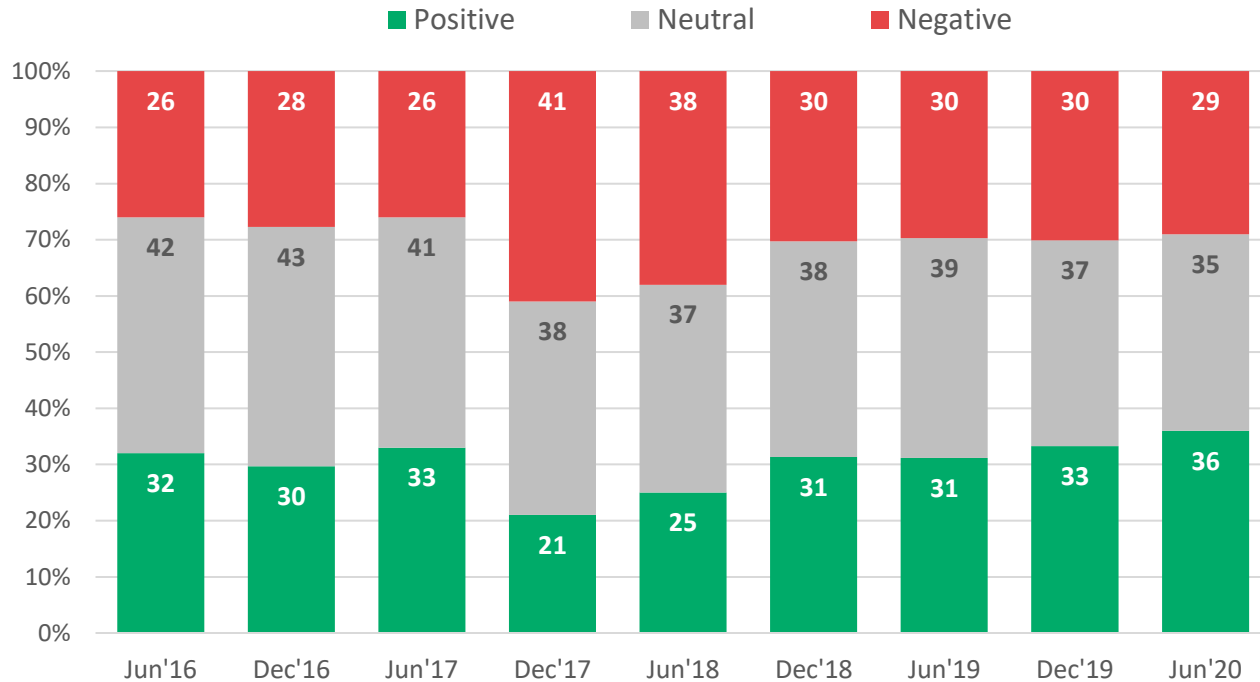
# Confidence in availability of tools (Household)



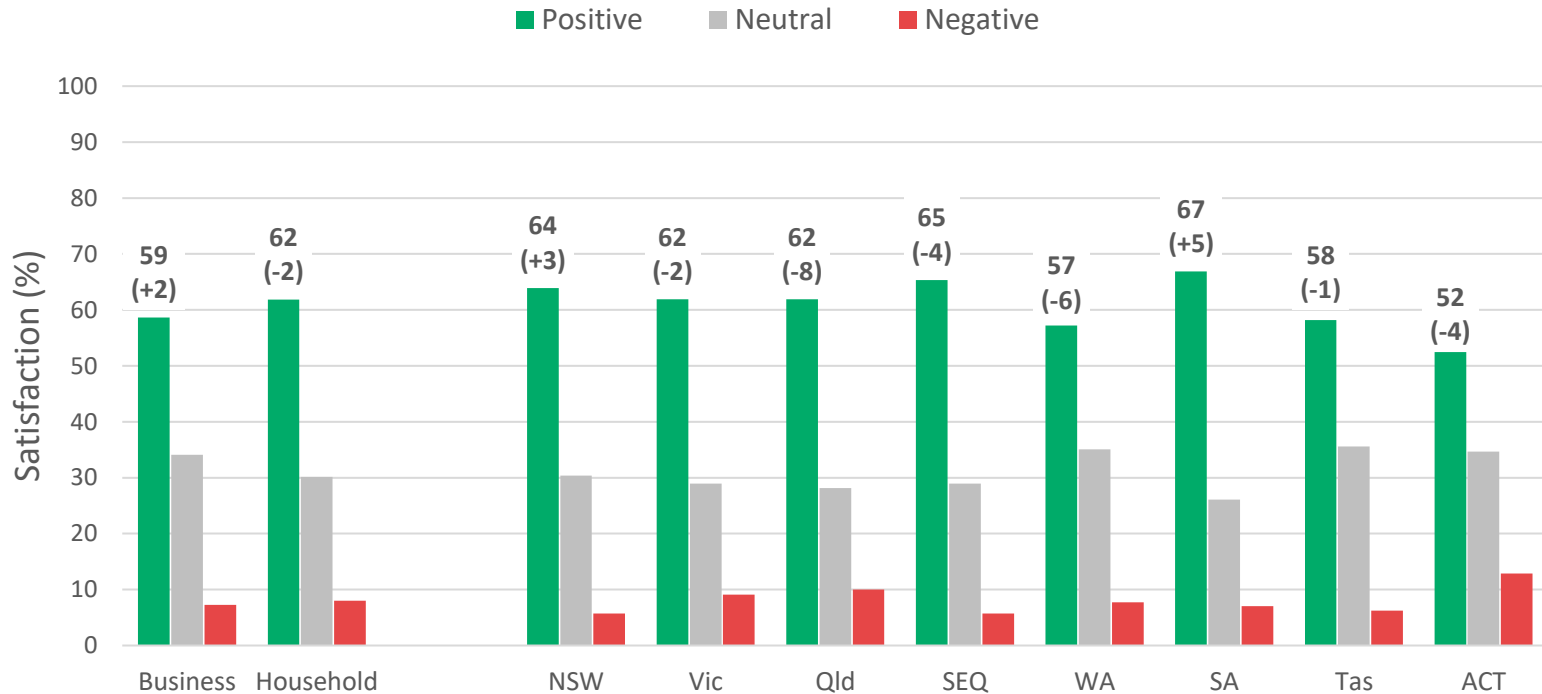
# Confidence in the market (Household)



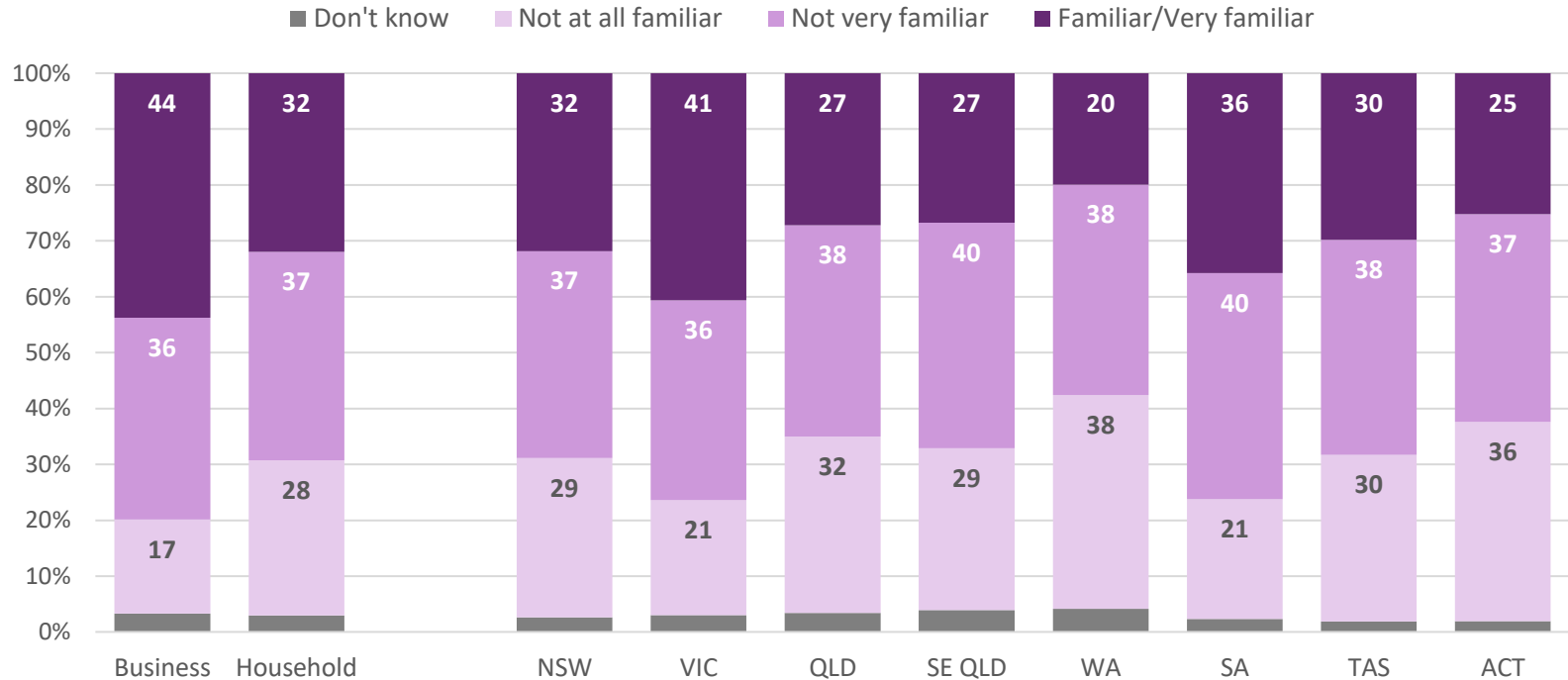
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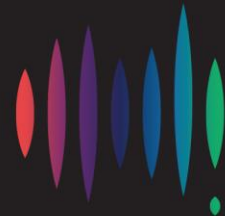


# Confidence in ability to have problems resolved (Household)



# Familiarity with Ombudsman services





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