

ENERGY CONSUMER SENTIMENT SURVEY

Household Topline Results
December 2020



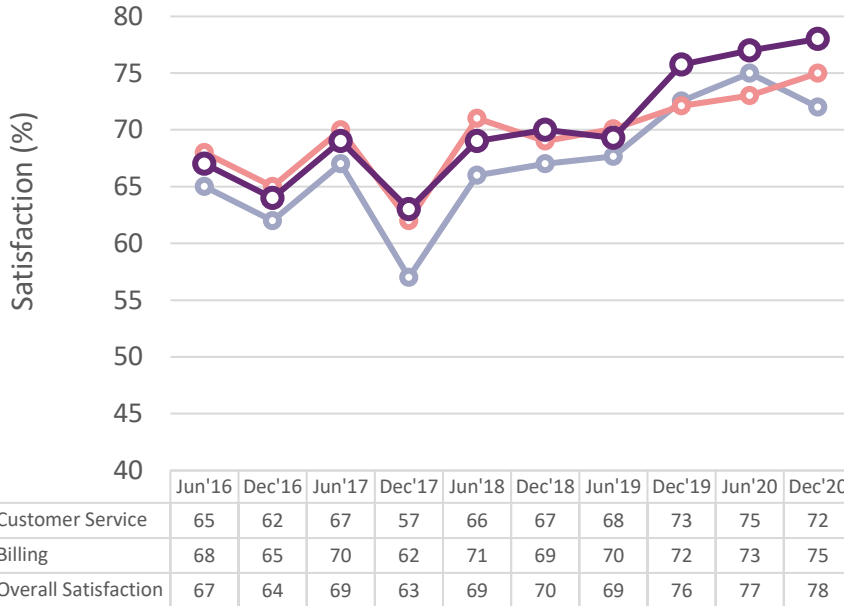
Satisfaction

- Household overall satisfaction with gas and electricity services continues to increase from the December 2017 low (now 78% up from 63%).
- There were year-on-year increases in energy satisfaction for Queensland (72% to 83%), SE Queensland (74% to 85%), South Australia (74% to 80%) and ACT (67% to 80%).
- Satisfaction with the level of competition is now at 58% (from 55% in December 2019), mainly reflecting increases in Queensland (up 11% from 48% to 59%) and SE Queensland (up 13% from 56% to 69%).

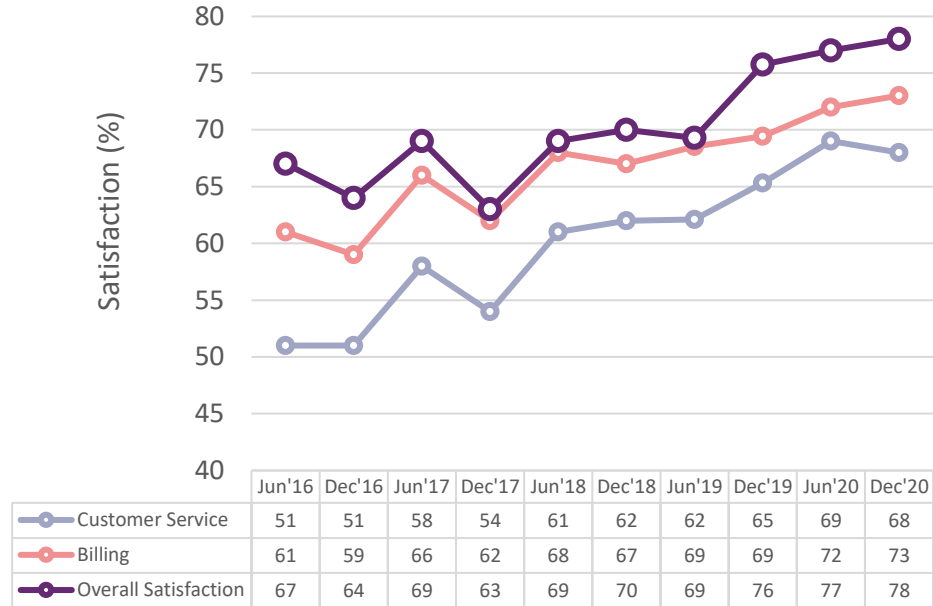


Household satisfaction with retailer measures

Household Satisfaction - Gas

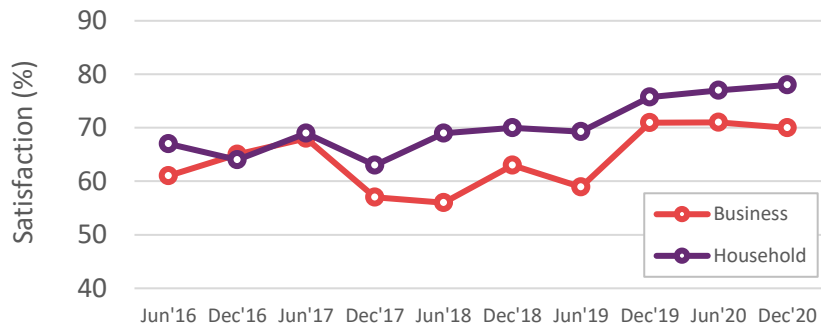


Household Satisfaction - Electricity

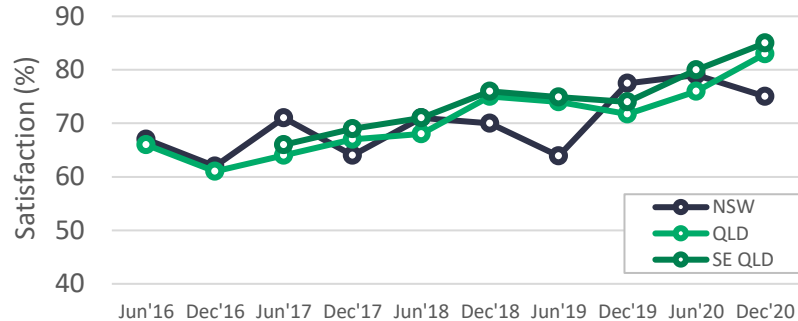


Overall satisfaction with energy services (Household)

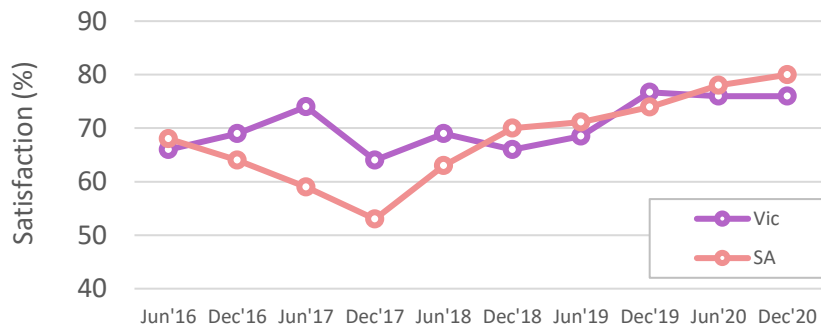
Overall Satisfaction - Business & Household



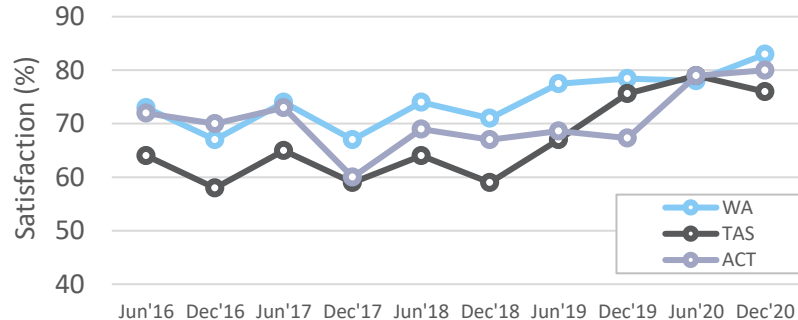
Overall Satisfaction - NSW, QLD & SE QLD



Overall Satisfaction - Victoria & SA



Overall Satisfaction - WA, TAS & ACT



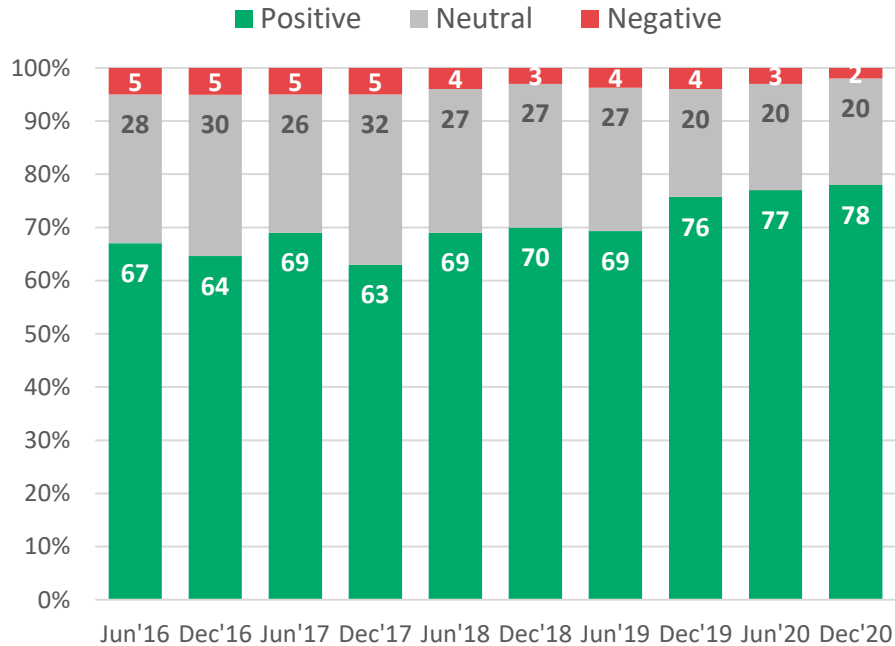
Overall satisfaction with energy services (Household)

Overall Satisfaction

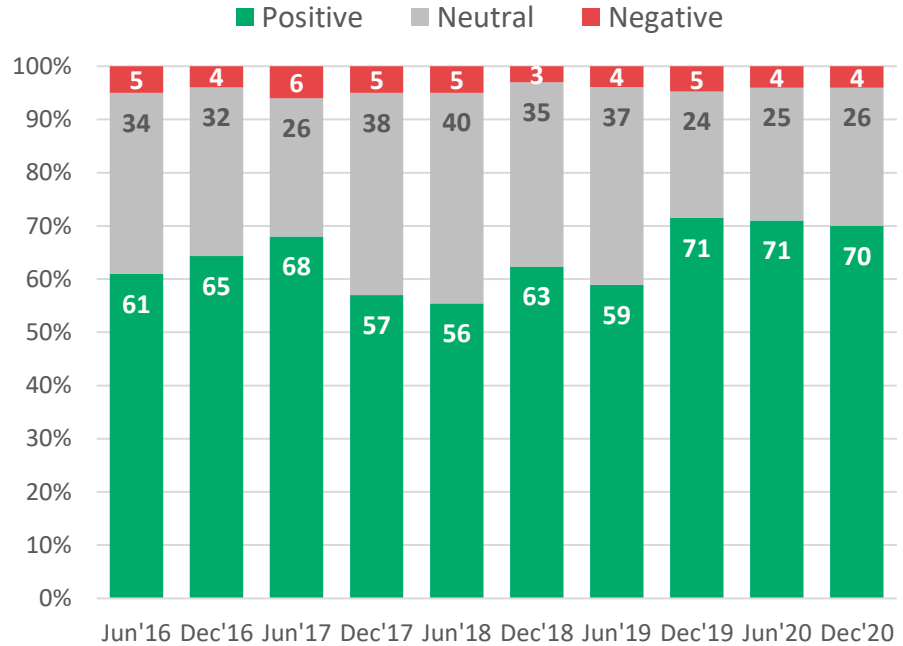
	Dec'20	Jun'20	Dec'19	Jun'19	Dec'18	Jun'18	Dec'17	Jun'17	Dec'16	Jun'16
Business	70%	71%	71%	59%	63%	56%	57%	68%	65%	61%
Household	78%	77%	76%	69%	70%	69%	63%	69%	64%	67%
NSW	75%	79%	77%	64%	70%	71%	64%	71%	62%	67%
Victoria	76%	76%	77%	69%	66%	69%	64%	74%	69%	66%
Queensland	83%	76%	72%	74%	75%	68%	67%	64%	61%	66%
SE Queensland	85%	80%	74%	75%	76%	71%	69%	66%	-	-
Western Australia	83%	78%	78%	78%	71%	74%	67%	74%	67%	73%
South Australia	80%	78%	74%	71%	70%	63%	53%	59%	64%	68%
Tasmania	76%	79%	76%	67%	59%	64%	59%	65%	58%	64%
ACT	80%	79%	67%	69%	67%	69%	60%	73%	70%	72%

Overall satisfaction with energy services (Business/Household)

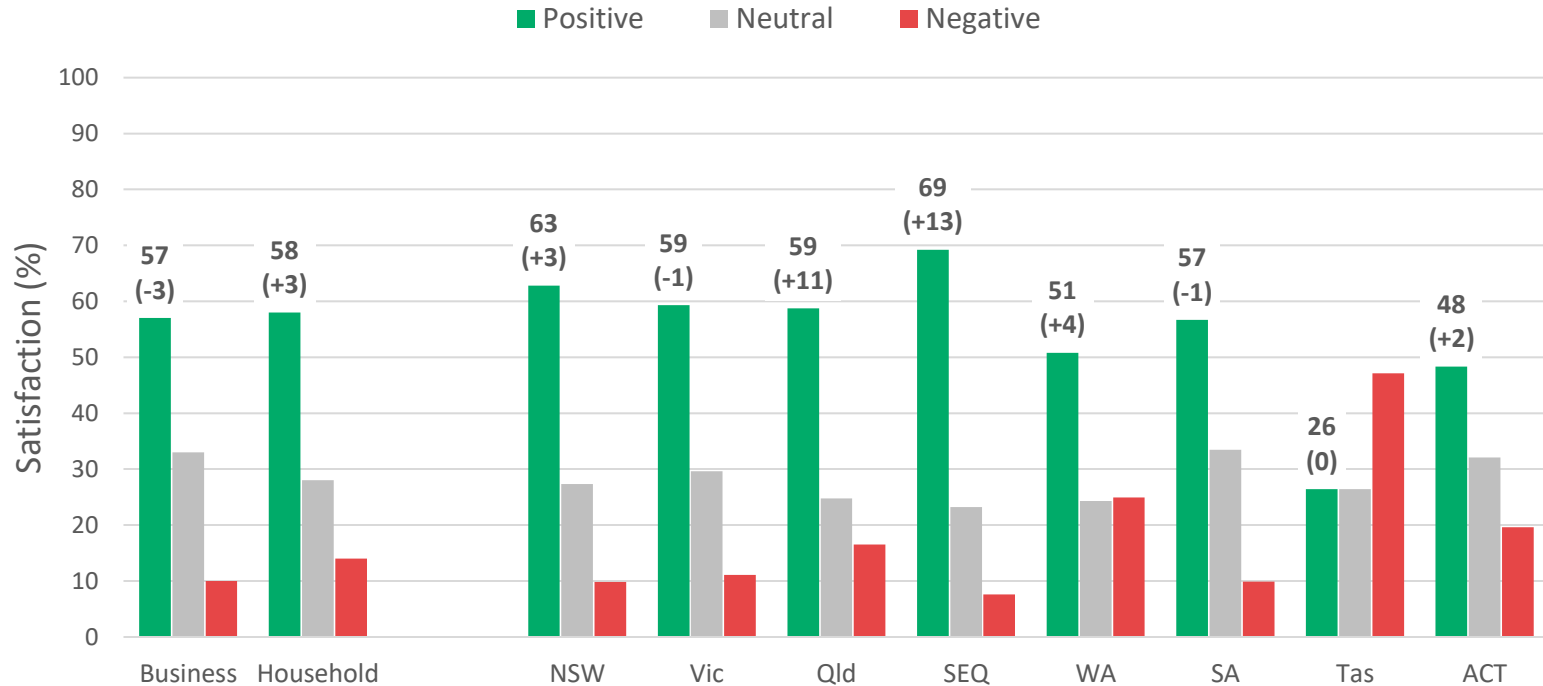
Overall Satisfaction - Household



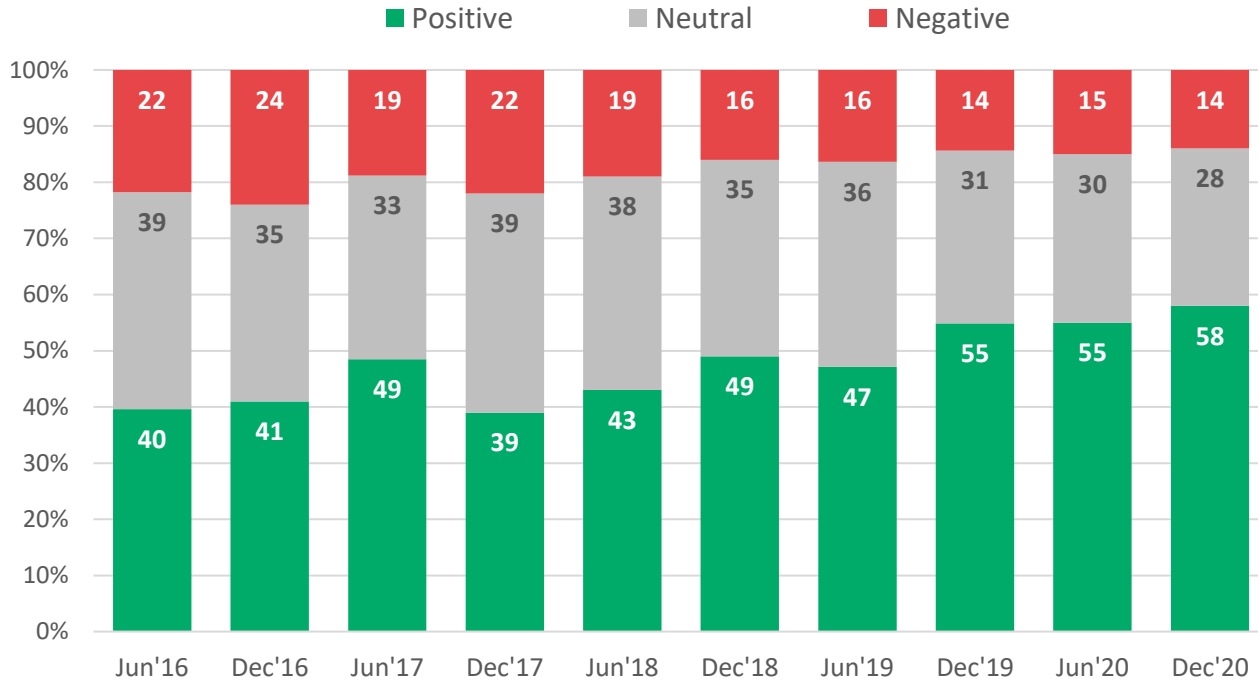
Overall Satisfaction - Business



Satisfaction with level of competition



Satisfaction with level of competition (Household)

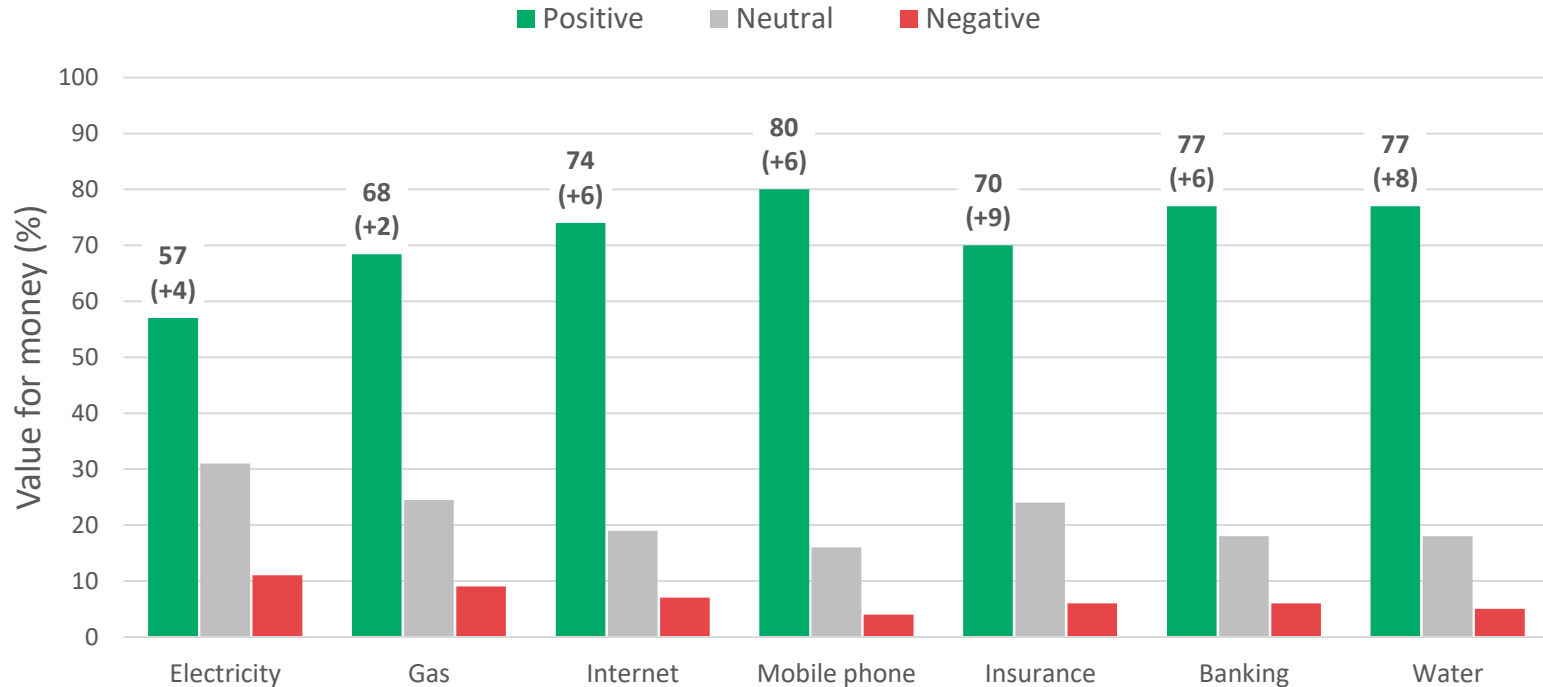


Value for money & Outages

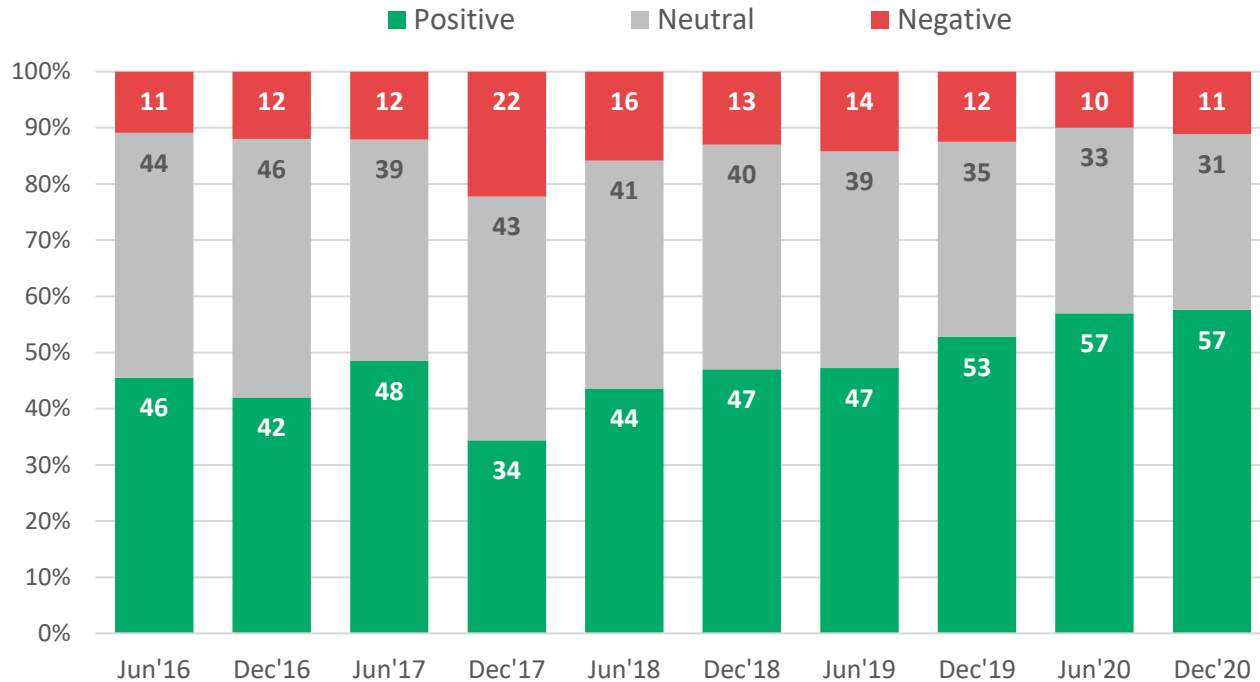
- Electricity value for money is still the lowest rated of all comparable services, at 57% (53% last year). Value for money of gas services is at 68% (66% last year).
- Satisfaction with electricity reliability is up in all states and territories compared to last year, with an overall rating of 78%.
- For households who experienced an electrical outage, satisfaction with the duration is at 67%, comparable to last year. Satisfaction in Queensland has increased (up 12% from 60% to 72%), driven by an increase in SE Queensland (up 13% from 60% to 73%).



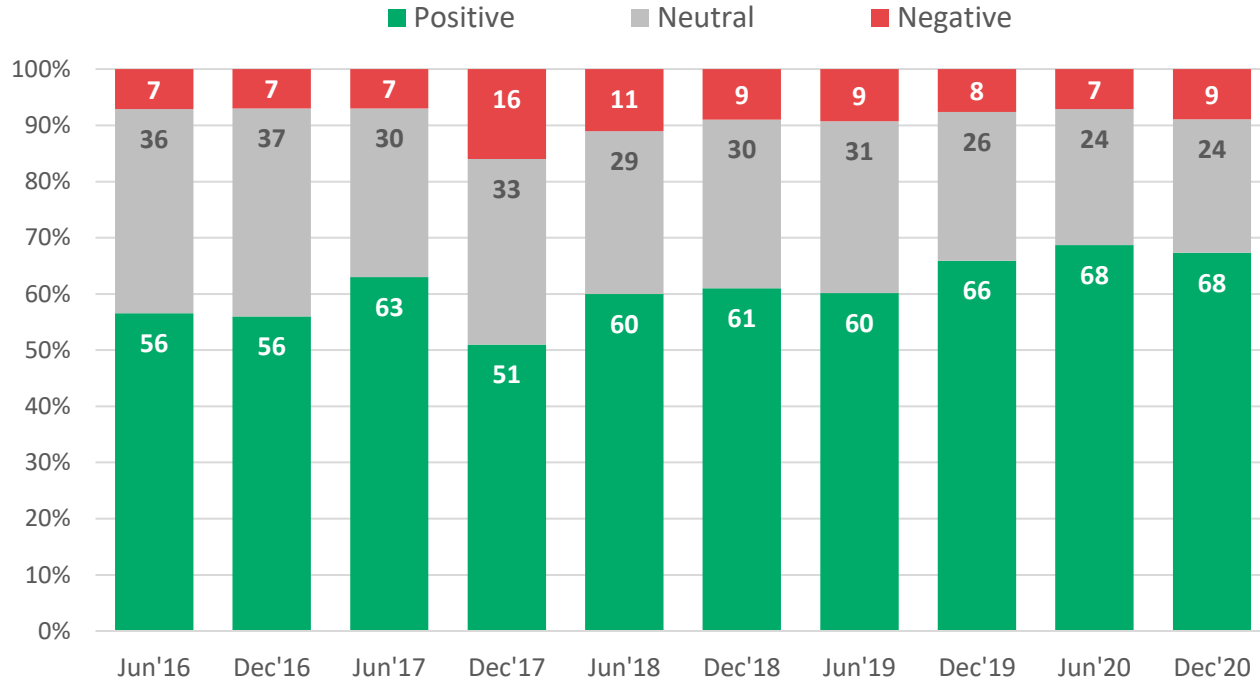
Value for money of all services (Household)



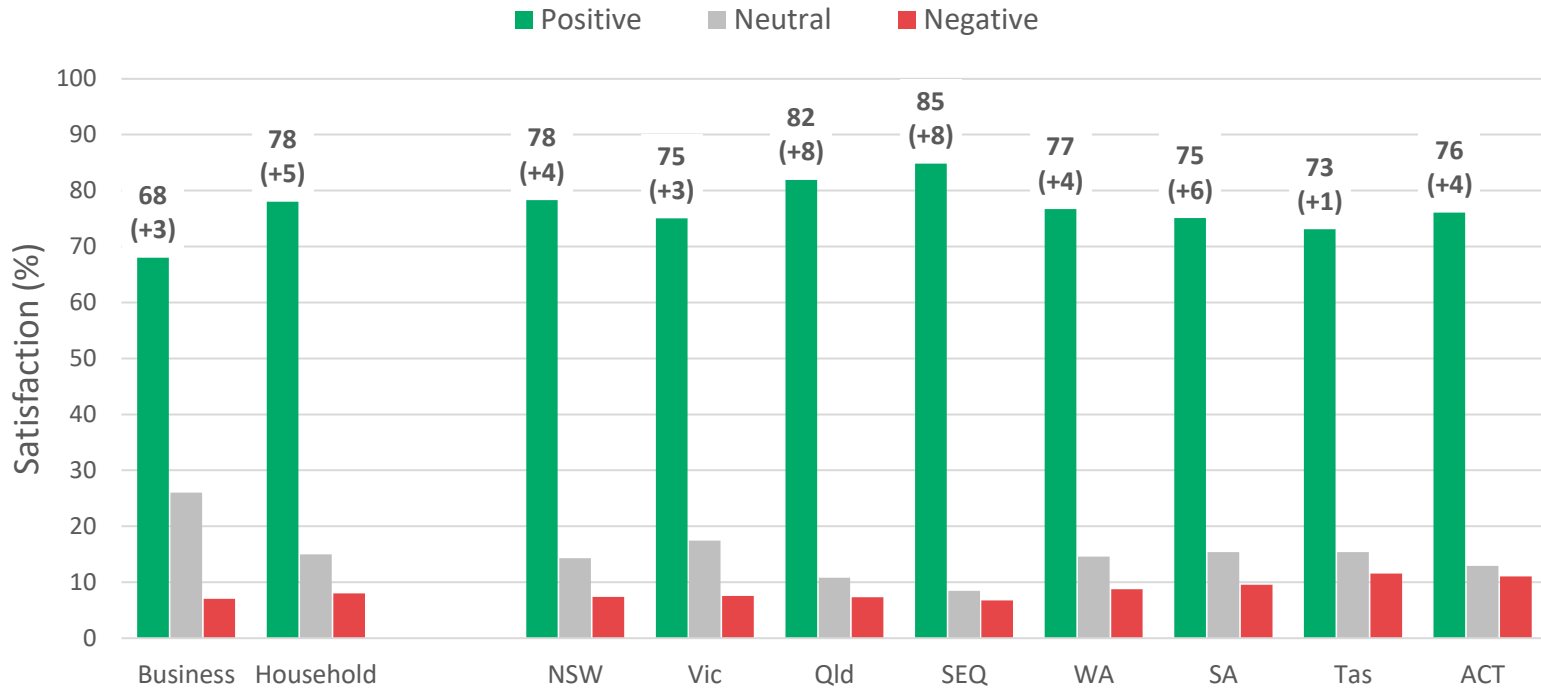
Value for money of electricity services (Household)



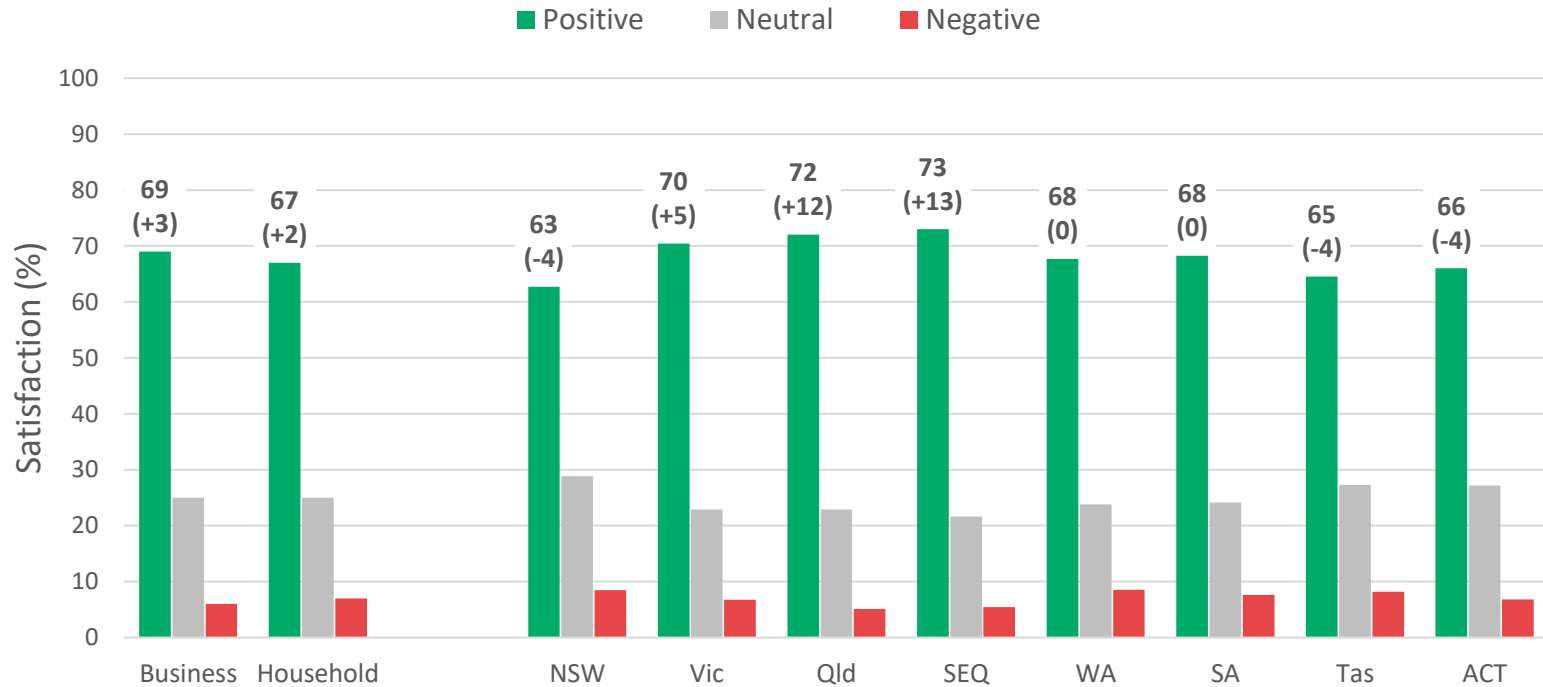
Value for money of gas services (Household)



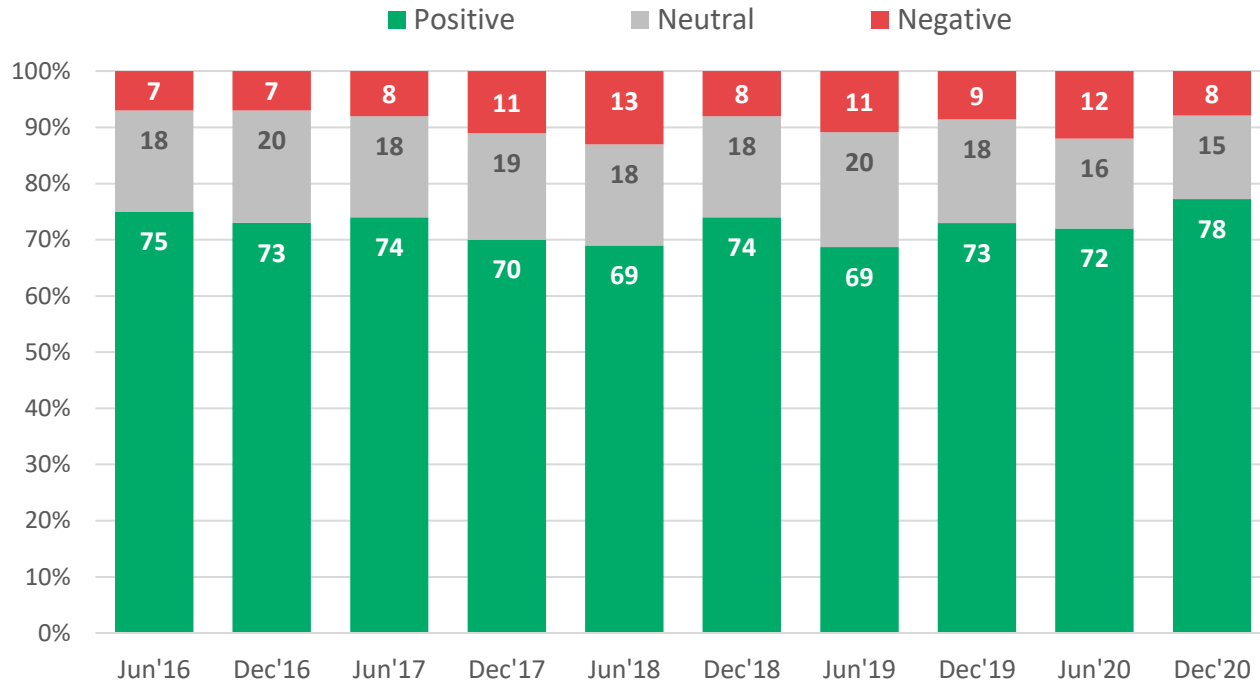
Satisfaction with number of electricity outages



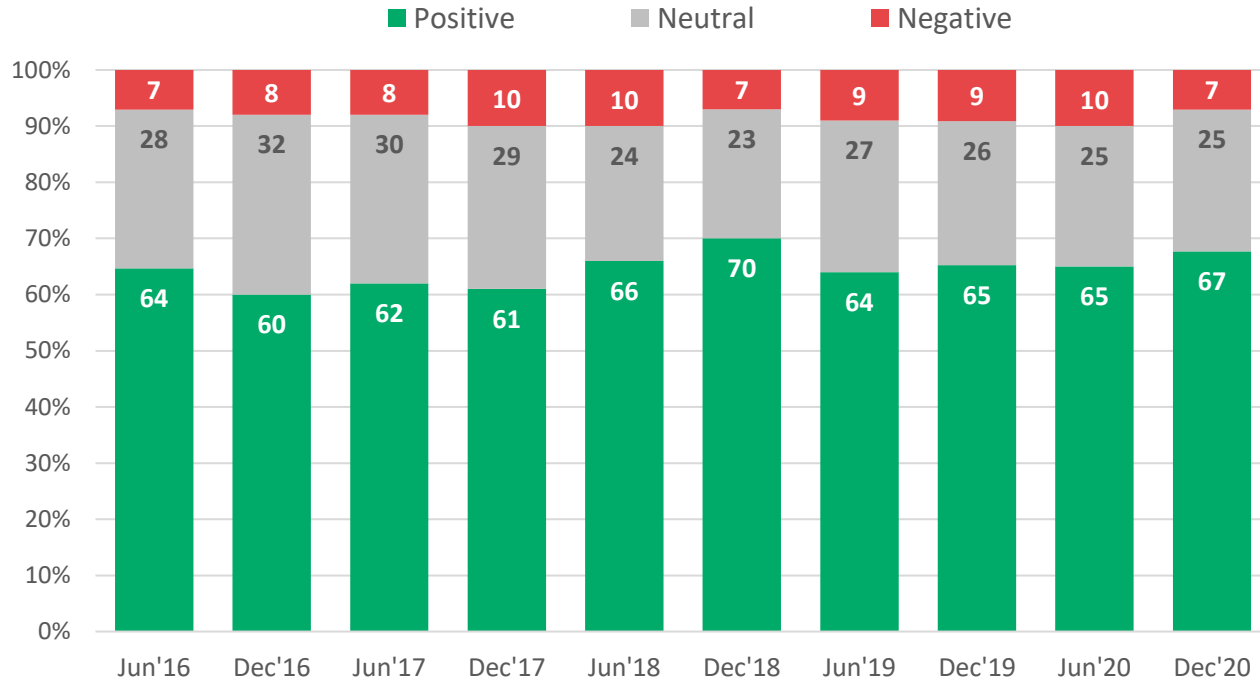
Satisfaction with duration of electricity outages



Satisfaction with number of electricity outages (Household)



Satisfaction with duration of electricity outages (Household)

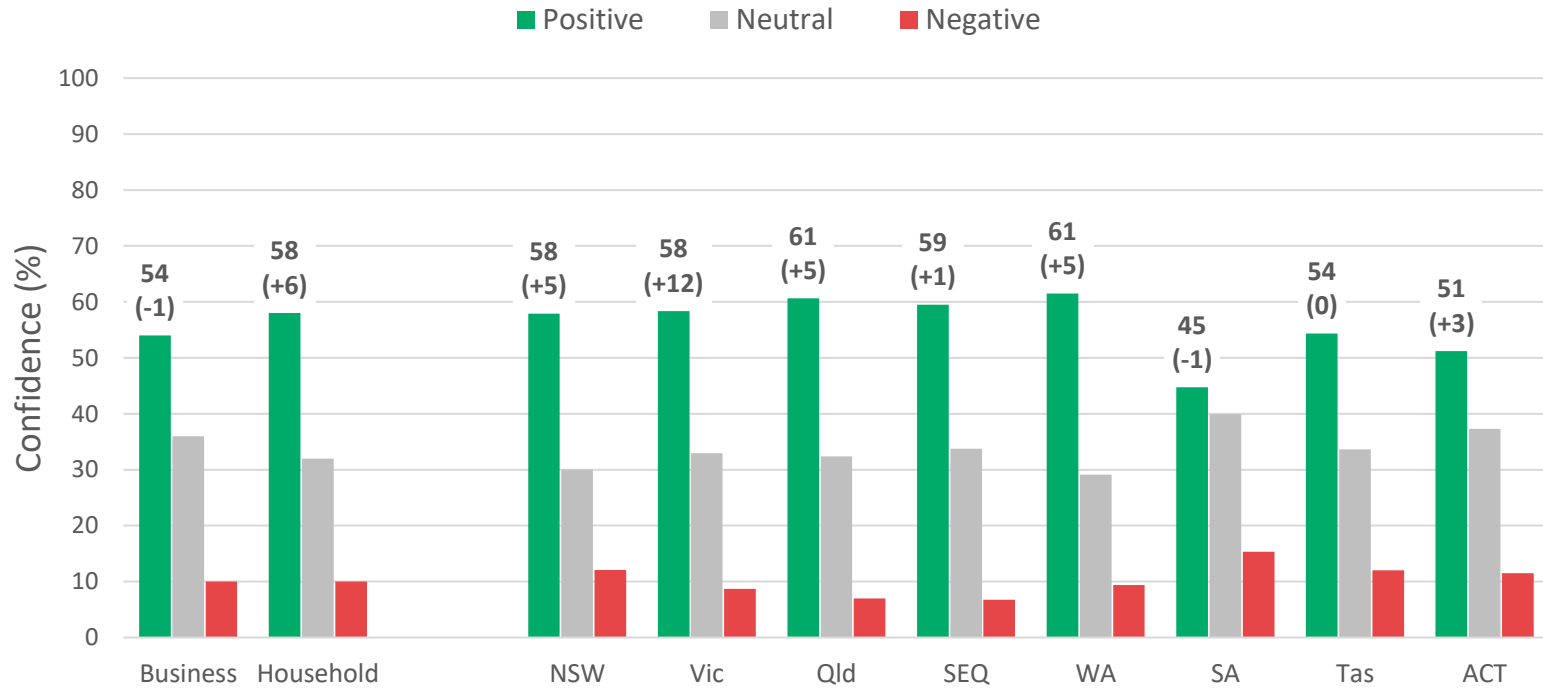


Household Confidence

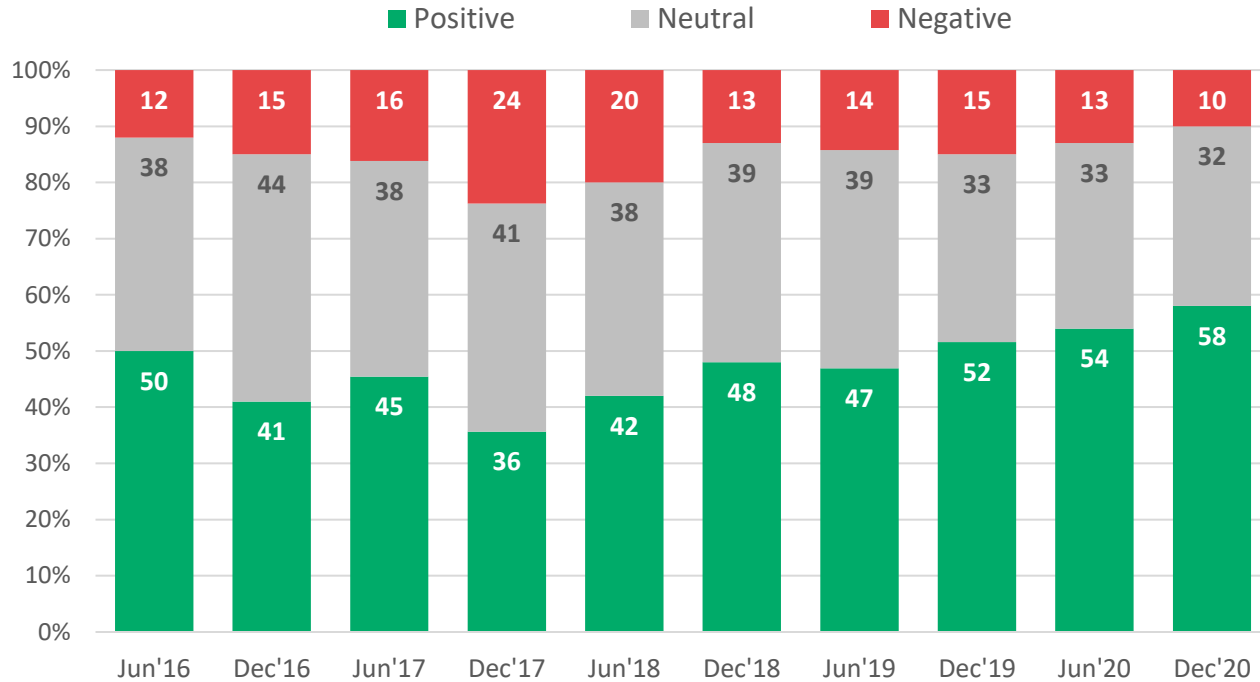
- Household confidence in future reliability continues to grow from a low of 36% in December 2017 to 58%.
- 70% of households say they are confident in their ability to make choices about energy products and services, such as which plan or supplier to choose, but just 38% are confident that the market (energy industry and energy regulators) is working in their long-term interests.
- One-third of households are familiar with the Energy Ombudsman.



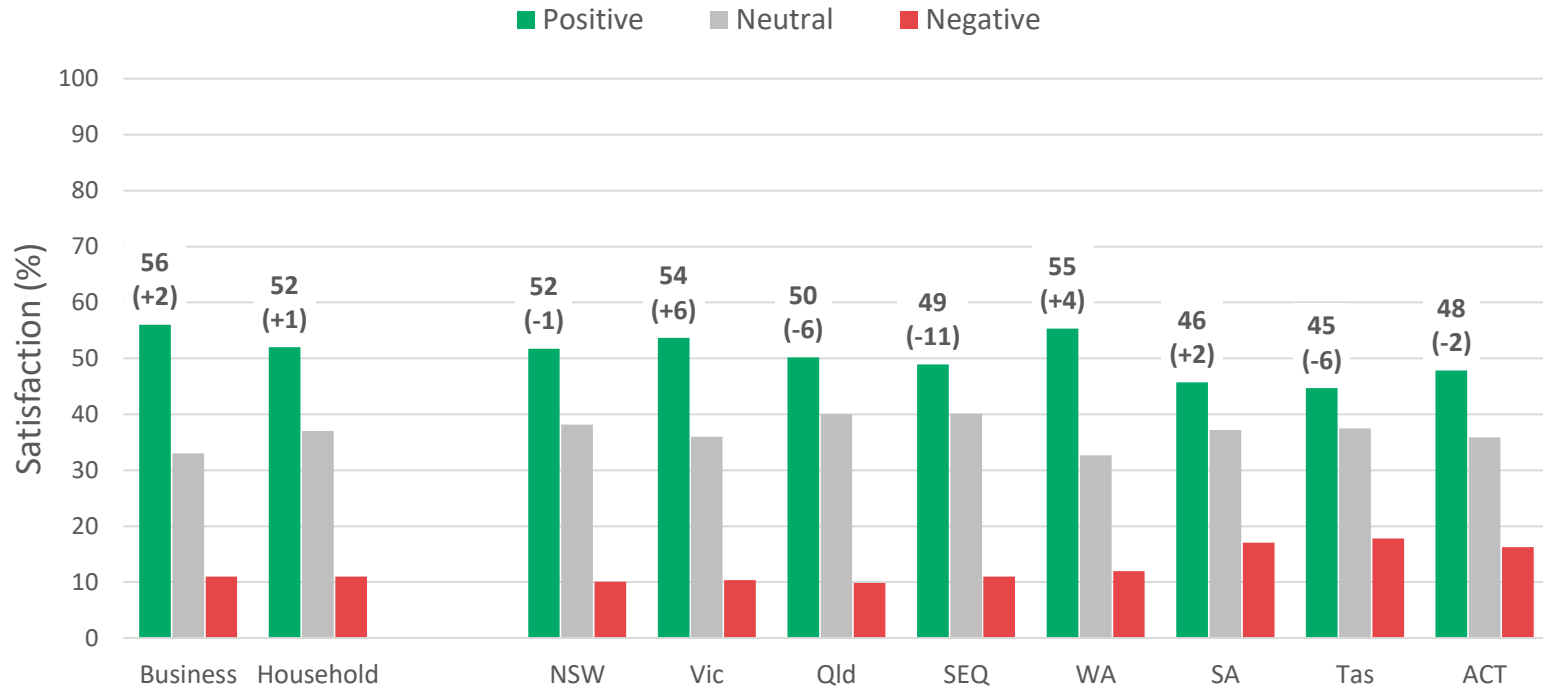
Confidence in future reliability



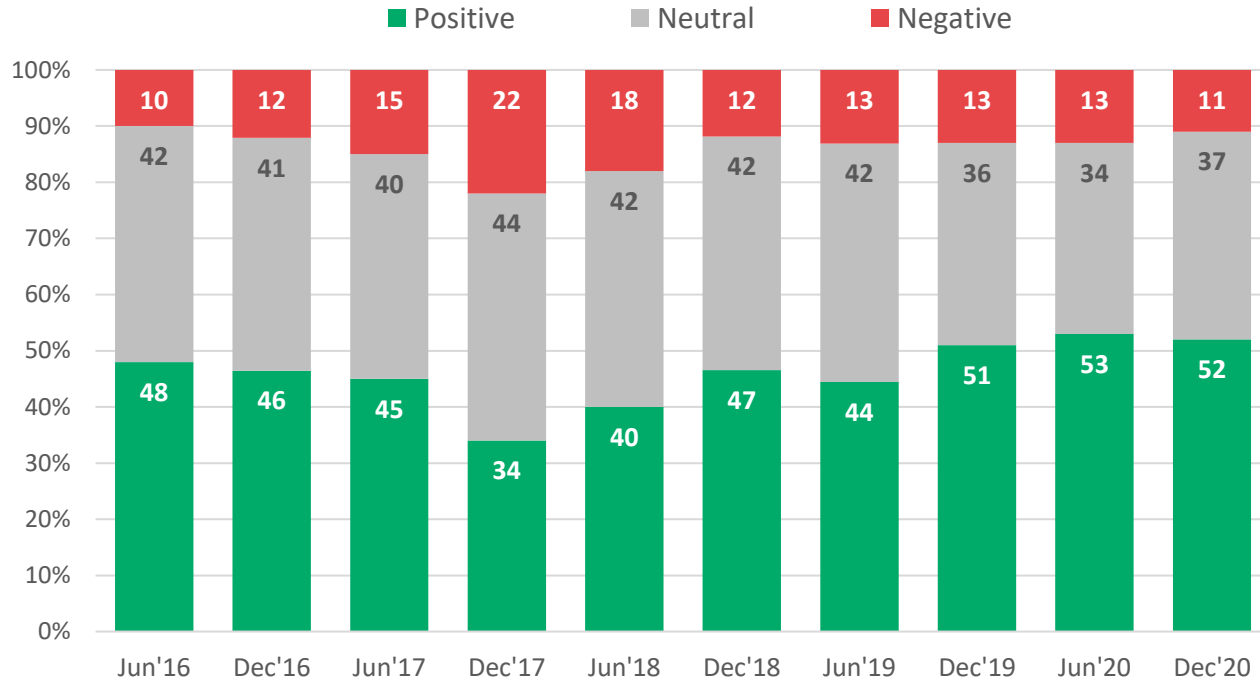
Confidence in future reliability (Household)



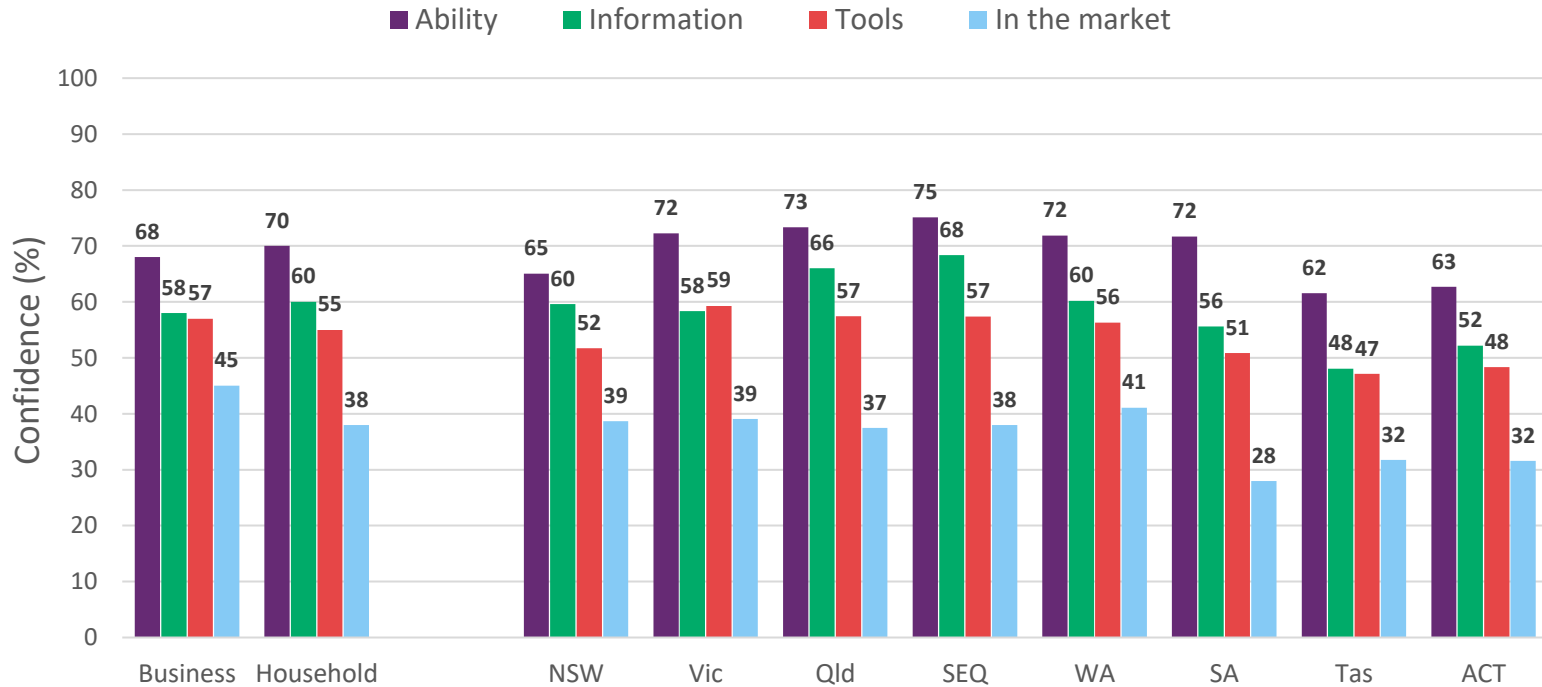
Confidence in advances in technology



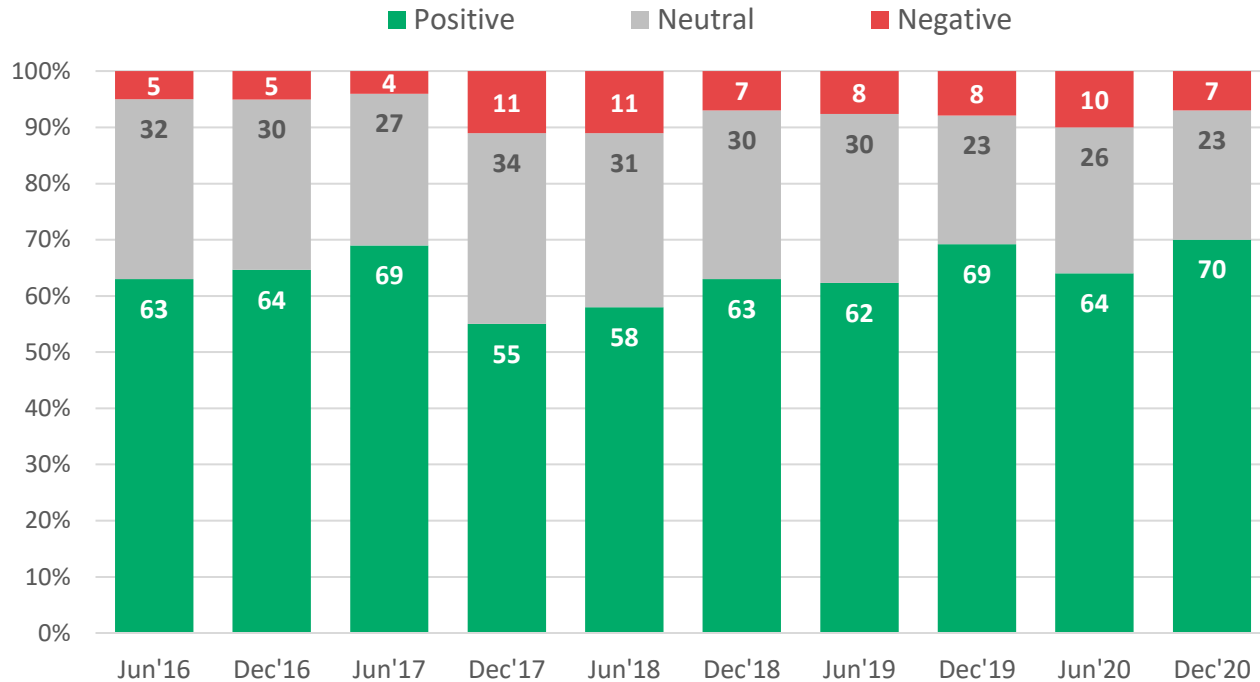
Confidence in advances in technology (Household)



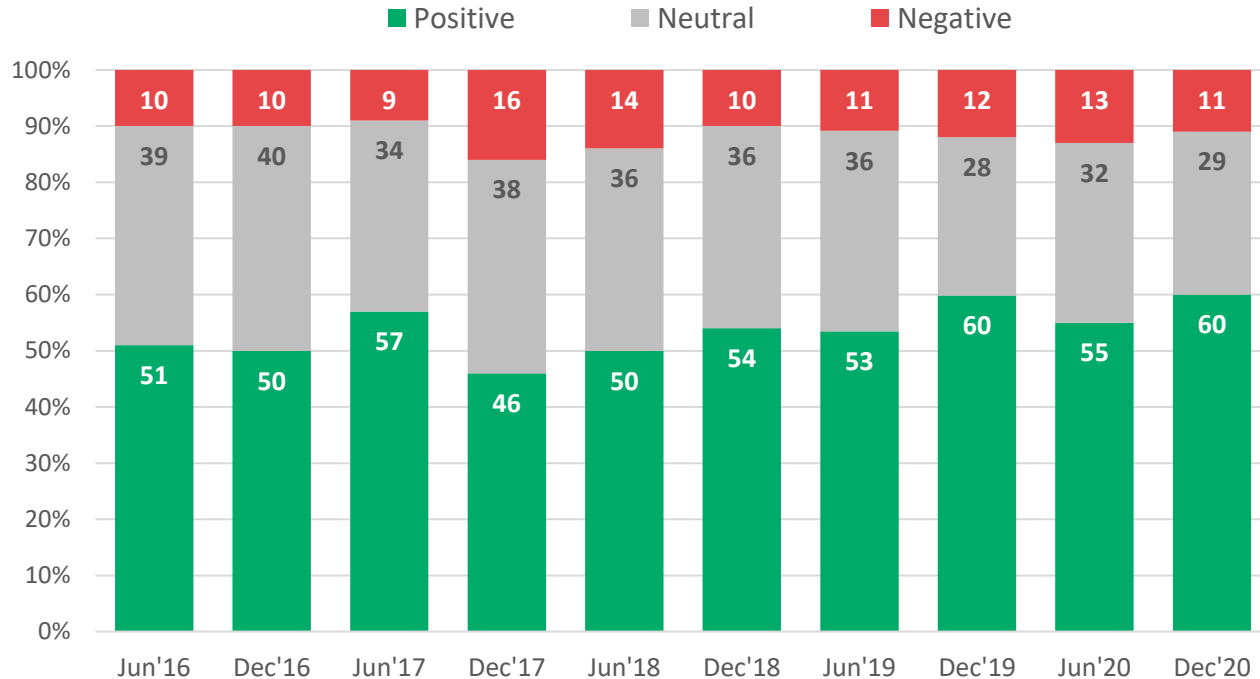
Confidence in ability, information and tools (Household)



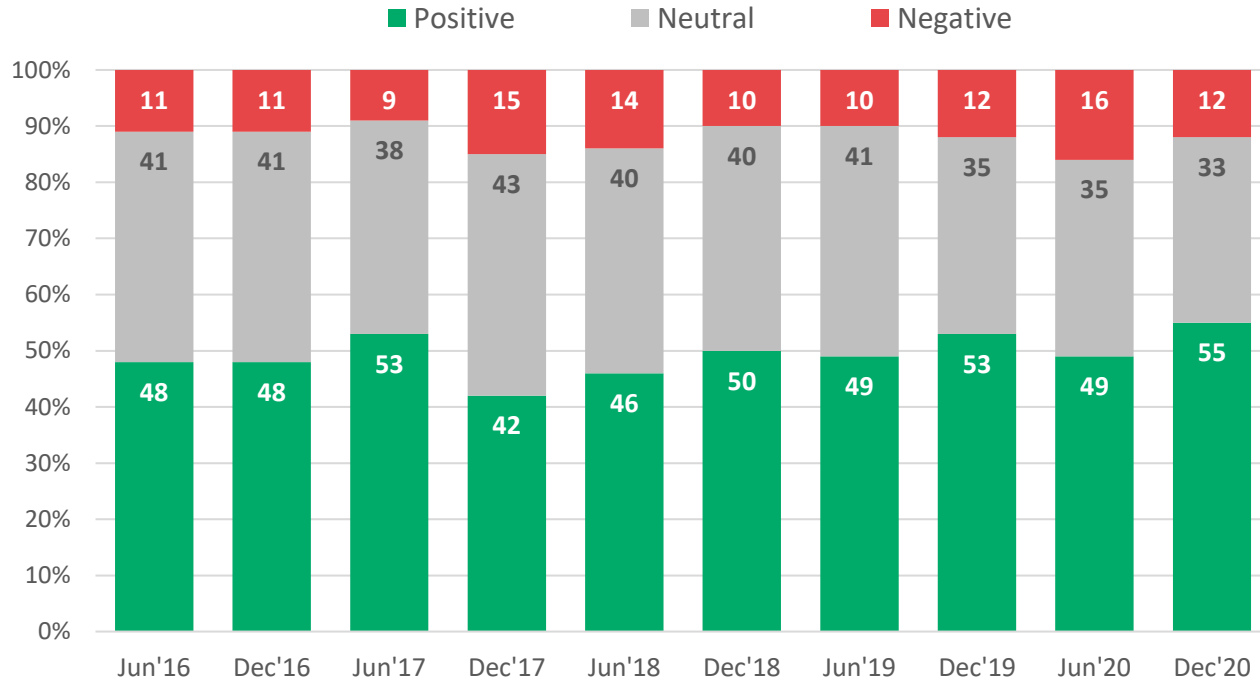
Confidence in ability to make choices (Household)



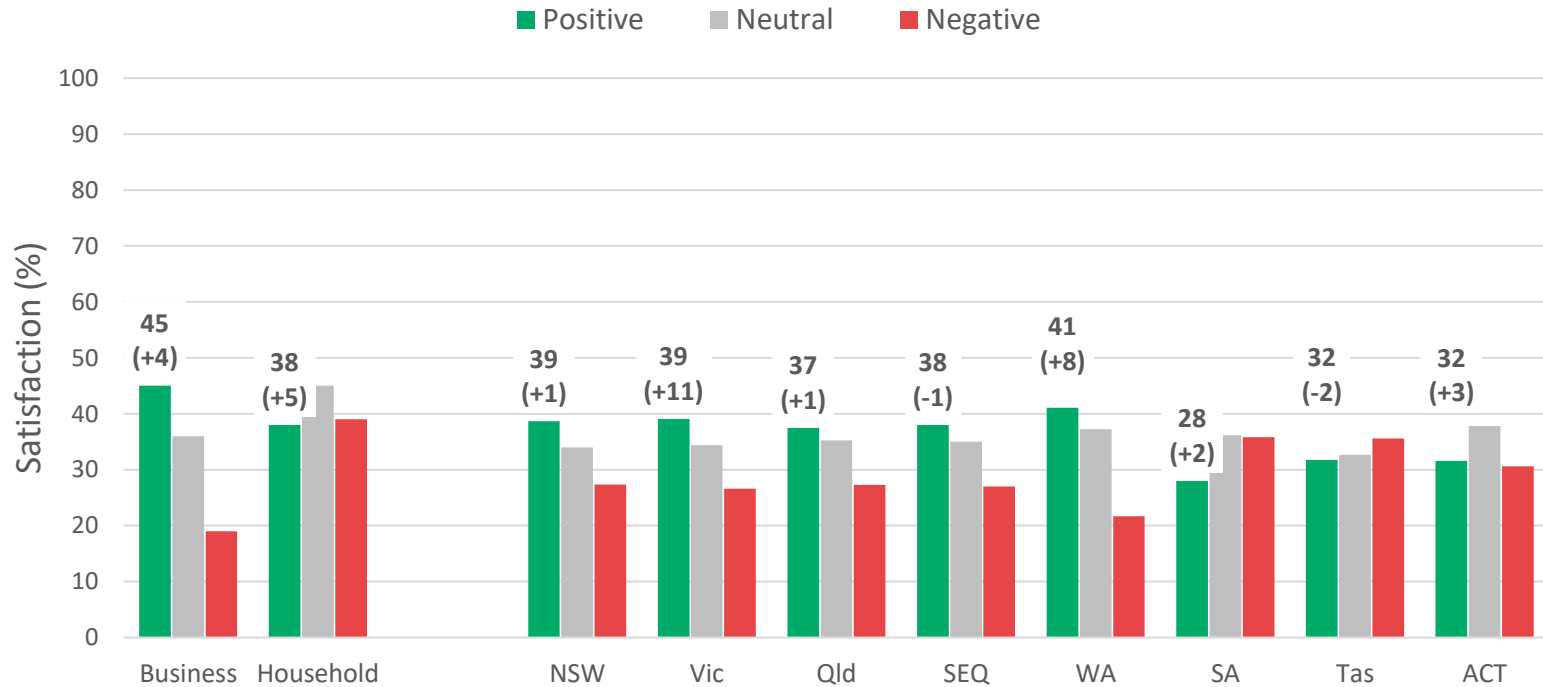
Confidence in availability of enough easily understood information (Household)



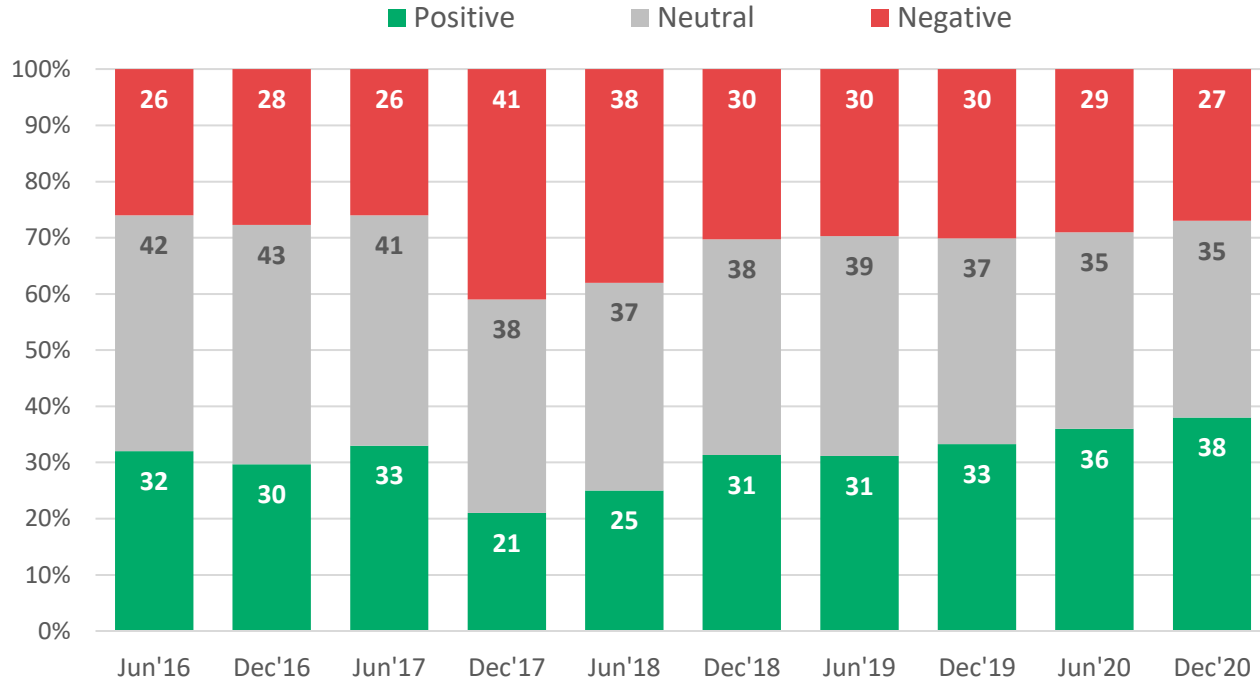
Confidence in availability of tools (Household)



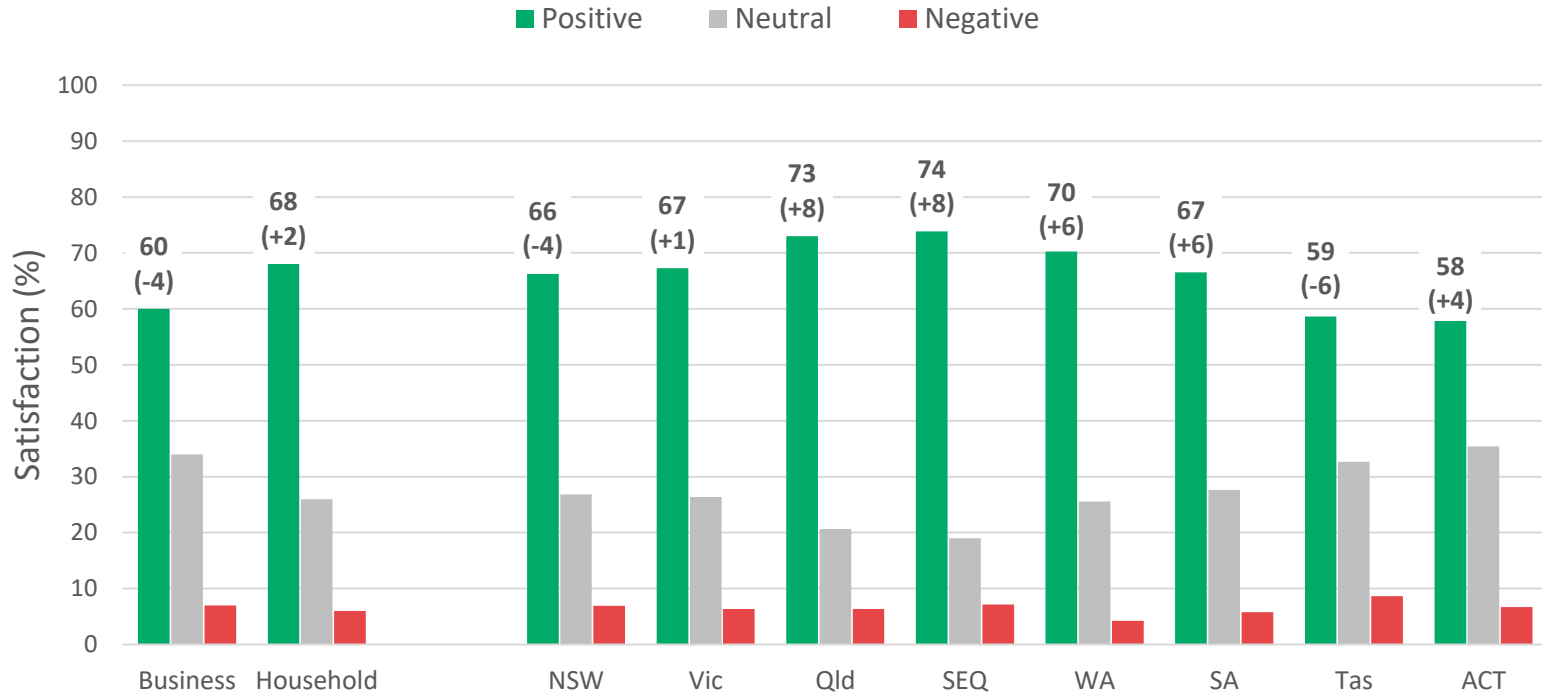
Confidence in the market



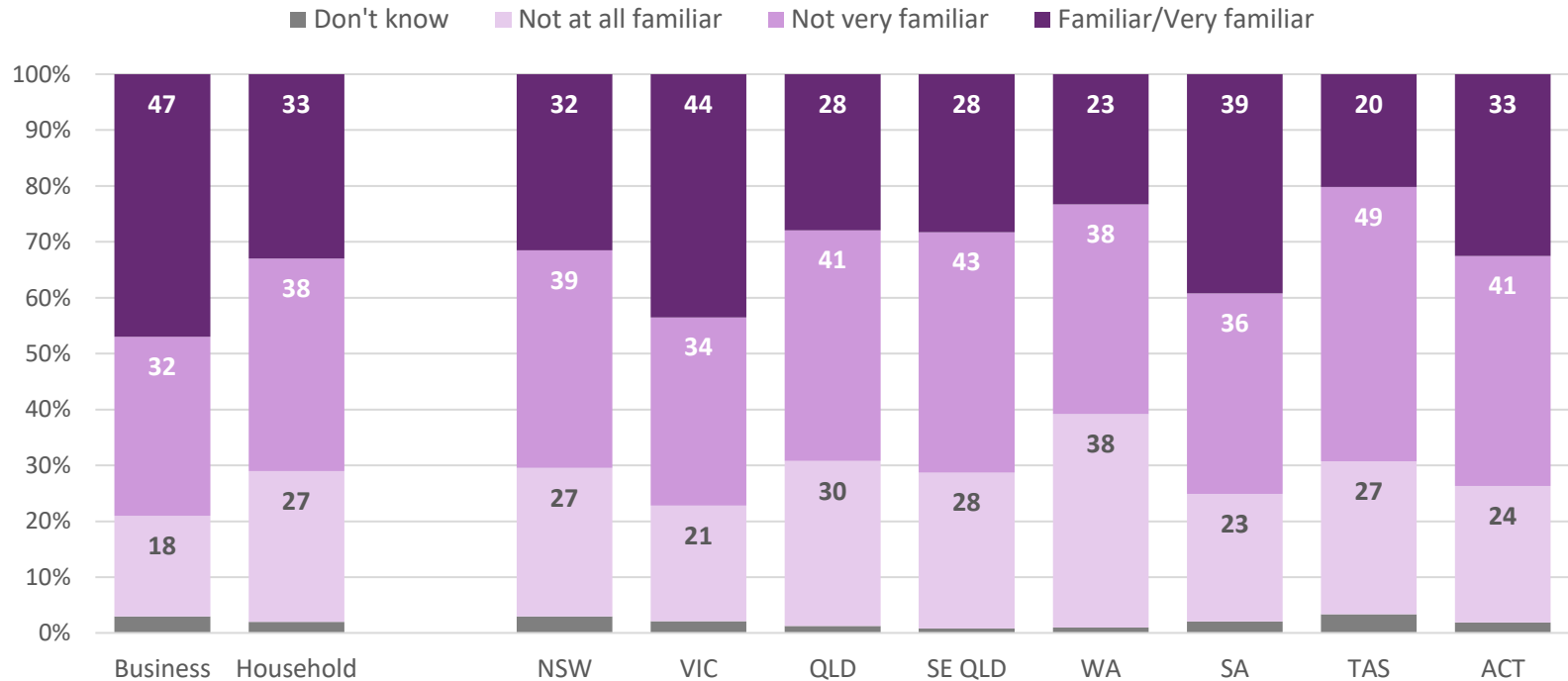
Confidence in the market (Household)

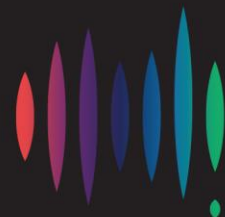


Confidence in ability to have problems resolved



Familiarity with Ombudsman services





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