

ENERGY CONSUMER SENTIMENT SURVEY

Business Topline Results
December 2021

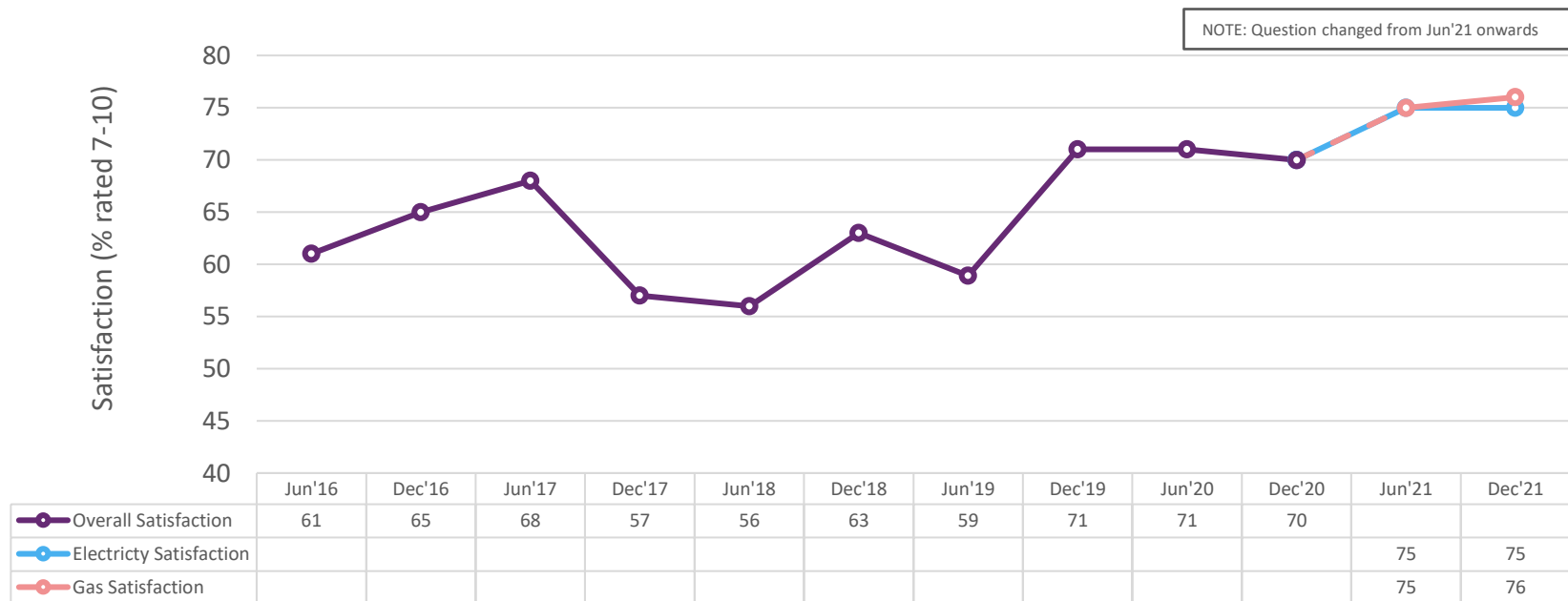


Satisfaction

- Business satisfaction with electricity and gas is at 75% and 76% respectively (overall energy satisfaction was 70% from this time last year).
- Electricity customer service satisfaction is at 69% (up from 63% last year), while billing satisfaction is at 71% (up from 67% last year).
- Satisfaction with gas billing is at 70%, consistent with last year (68%), while satisfaction with customer service is at 71% (66% last year).



Satisfaction with retailer measures: Provision of electricity and gas services



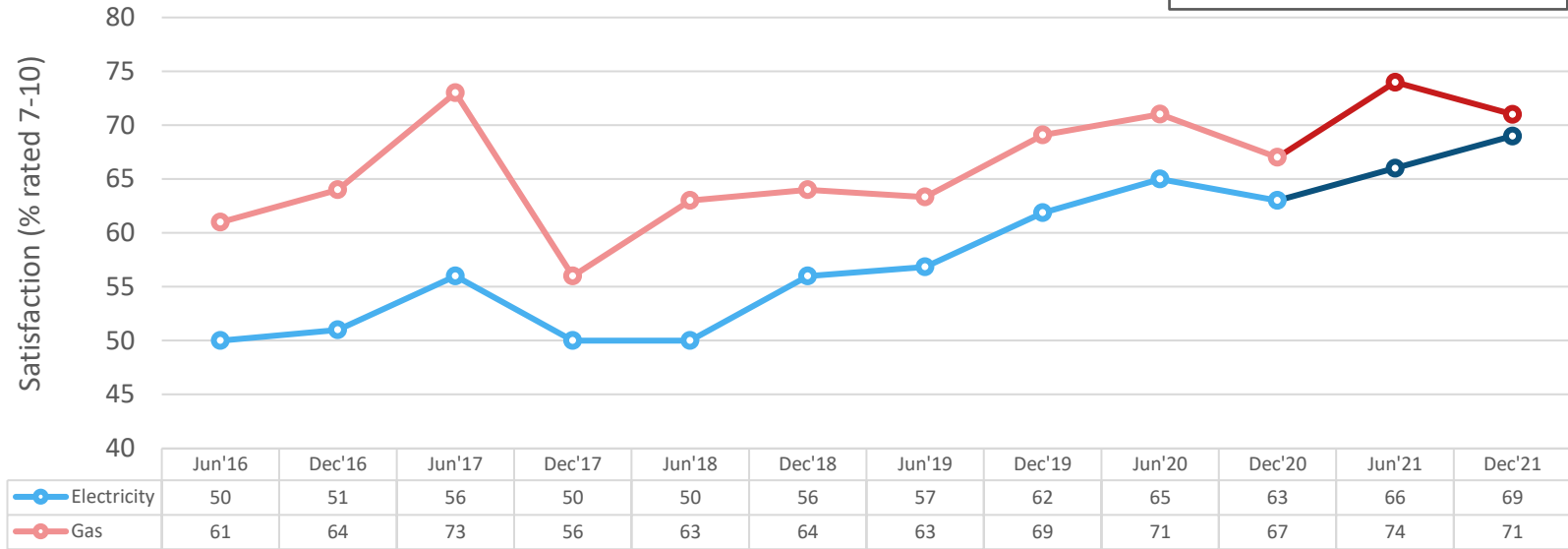
Q (Jun'16-Dec'20): How satisfied are you with the following? **The provision of your electricity and gas services overall over the last 6 months**, Base size: All businesses (min. n=280)

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)

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=300)

Satisfaction with retailer measures: Customer service

NOTE: Question changed from Jun'21 onwards



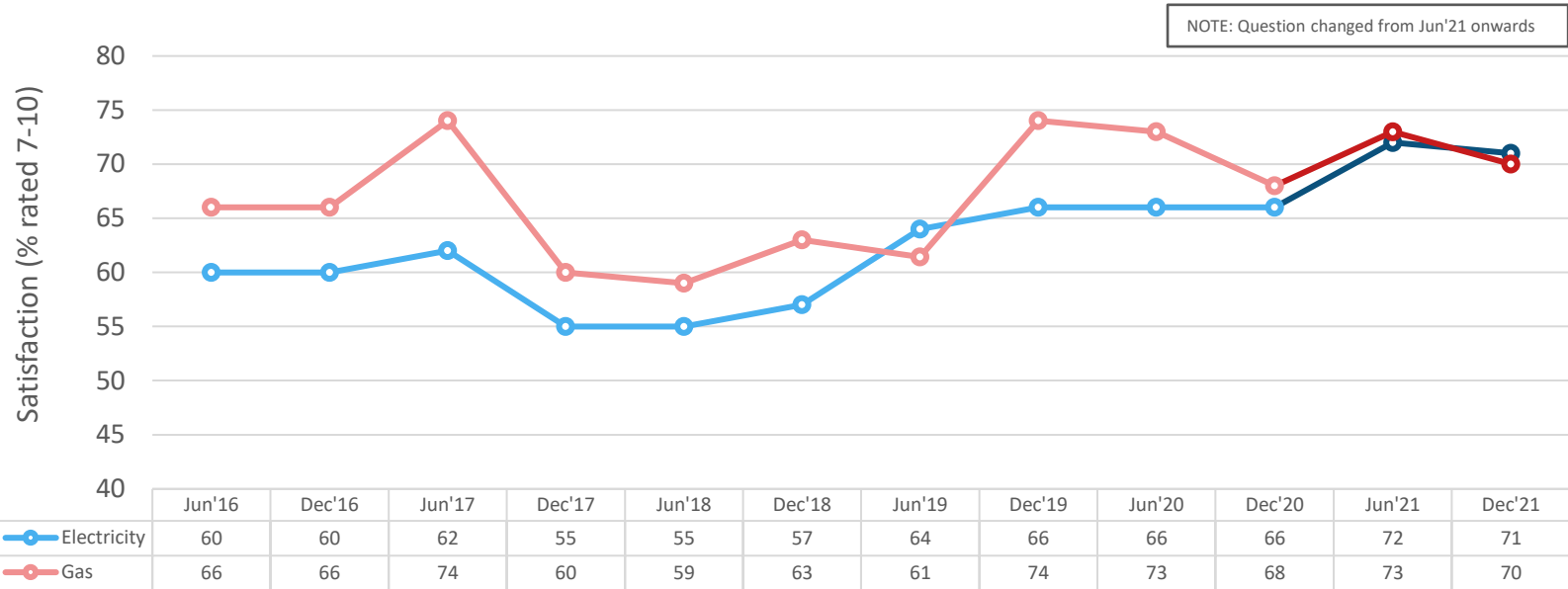
Q (Jun'16-Dec'20): How satisfied are you with the following? **The overall quality of customer service provided by your electricity company in the past 6 months**, Base size: All businesses (min. n=280)

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 businesses (min. n=500)

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 businesses with a mains gas supply (min. n=199)

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 businesses with a mains gas supply (min. n=300)

Satisfaction with retailer measures: Billing



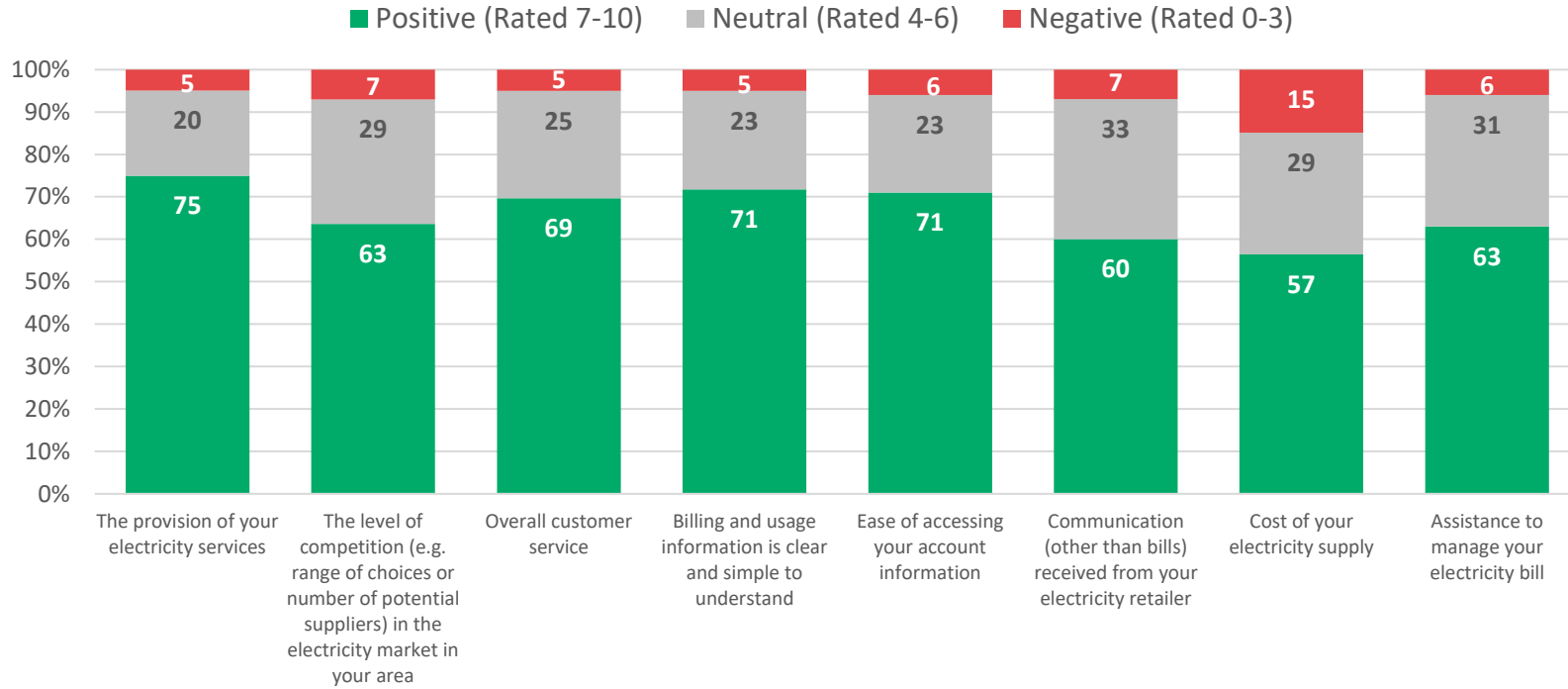
Q (Jun'16-Dec'20): How satisfied are you with the following? **The billing and account options (such as the option of monthly billing, online accounts etc.) currently available to you from your electricity supplier**, Base size: All businesses (min. n=280)

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 businesses (min. n=500)

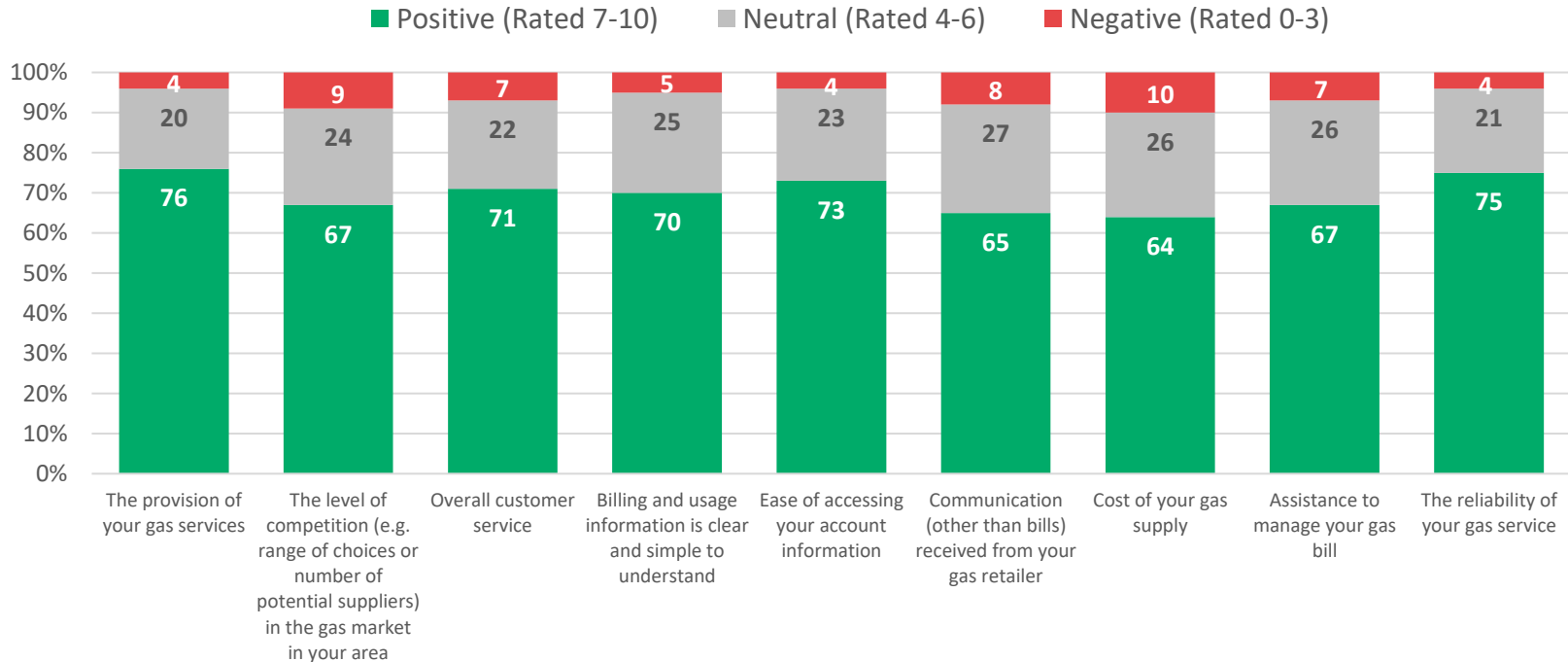
Q (Jun'16-Dec'20): How satisfied are you with the following? **The billing and account options (such as the option of monthly billing, online accounts etc.) currently available to you from your gas supplier**, Base size: All businesses with a main gas supply (min. n=199)

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 businesses with a mains gas supply (min. n=300)

Satisfaction with retailer measures: Electricity



Satisfaction with retailer measures: Gas



Q: How satisfied are you with the following elements of your gas service over the past 6 months?

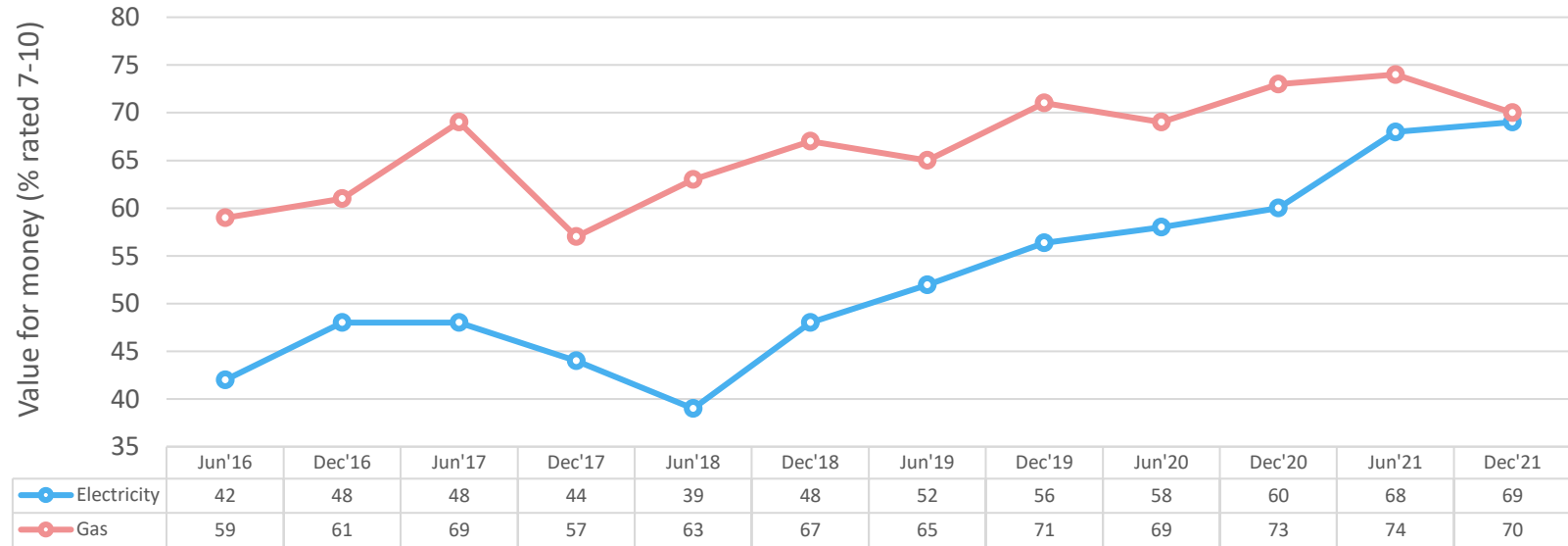
Base size: All businesses with a mains gas supply (n=339)

Value for money & Outages

- Electricity value for money continues to increase from the June 2018 low (it was 39%, now 69%).
- 69% of businesses gave a positive rating for value for money of electricity (60% last year.) 70% of businesses were satisfied with the value for money of gas (73% last year).
- 27% of small businesses have been affected by electricity outages in the last 6 months (down from 32% in March).
- Of those who have experienced an outage, 49% were satisfied with the the time it took to restore power and 41% were satisfied with the communication they received from the electricity supplier during the outage.



Value for money



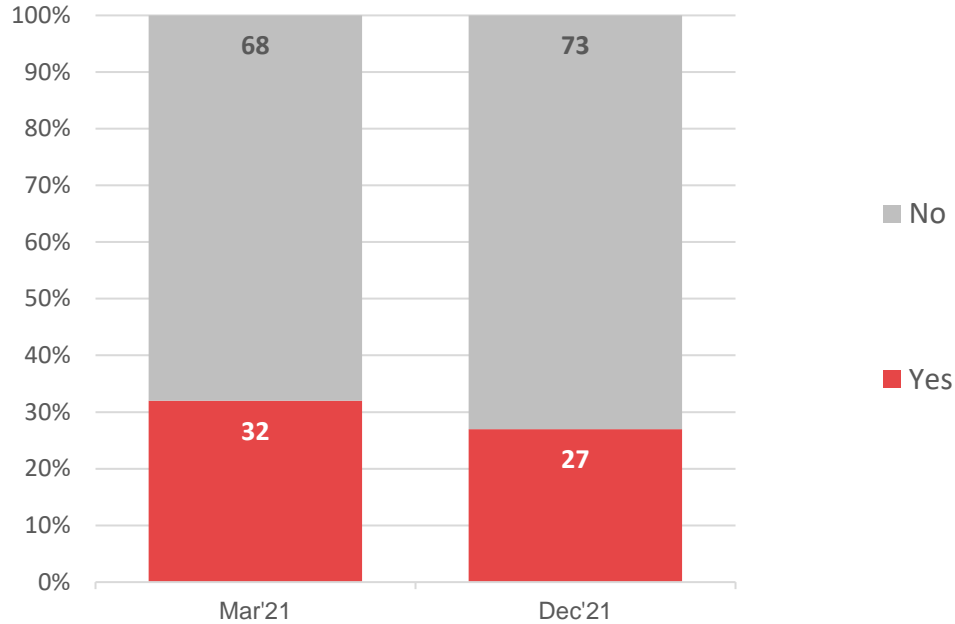
Q: How would you rate the overall value for money of the products and services provided by your electricity company in the past 6 months?

Base size: All businesses (min. n=280)

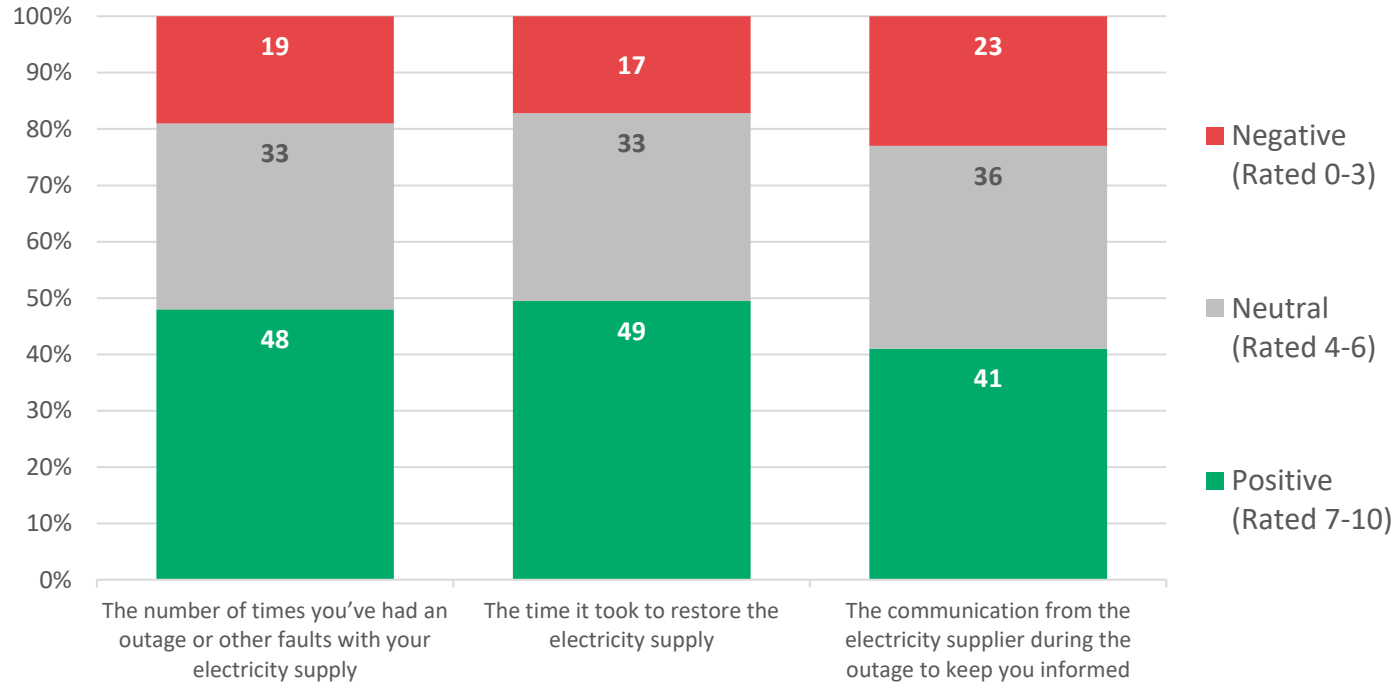
Q: How would you rate the overall value for money of the products and services provided by your gas retailer in the past 6 months?

Base size: All businesses with a mains gas supply (min. n=199)

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?

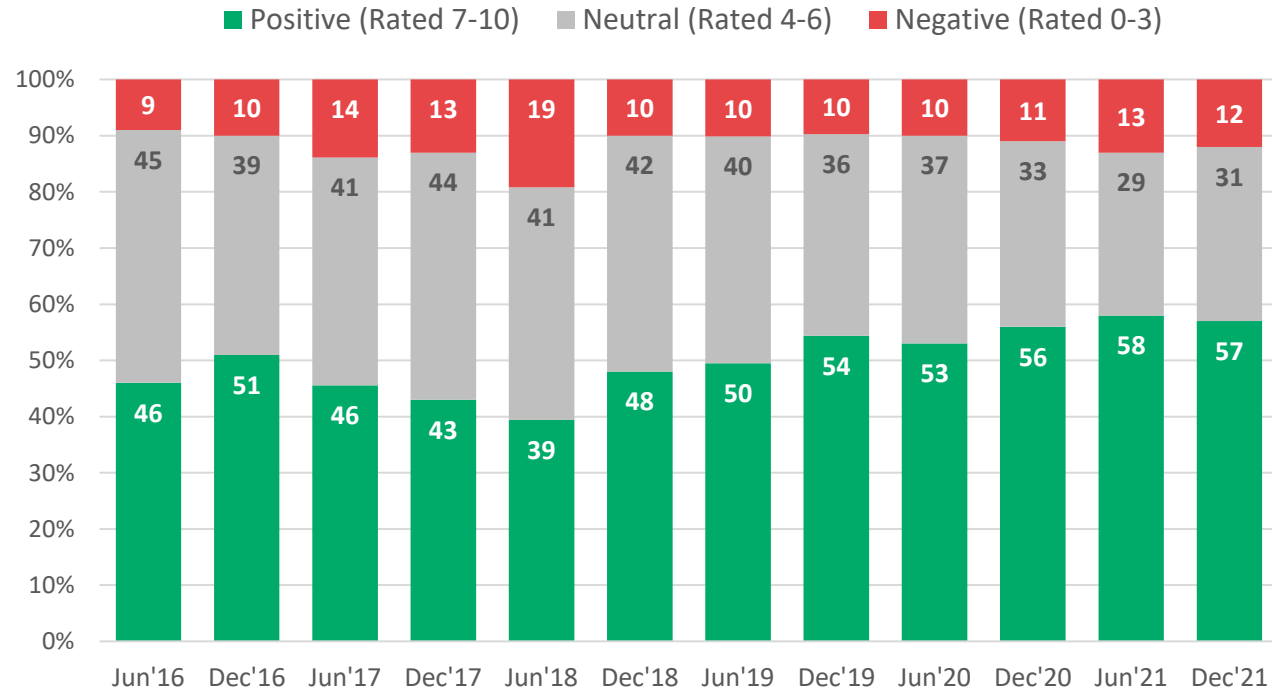
Base size: All businesses who have experienced an outage in the last 6 months (n=147)

Business Confidence

- Compared to December 2020, confidence has increased in the availability of enough easily understood information (from 58% to 63%), and the availability of the tools and assistance to manage energy use and costs (from 57% to 62%).
- Confidence in the overall market working in your long-term interests has also increased (from 45% to 51%).
- Confidence in advances in technology (57%), the ability to make choices about energy products and services (67%), and the ability to get problems resolved (62%) remain at consistent levels as in December 2020.



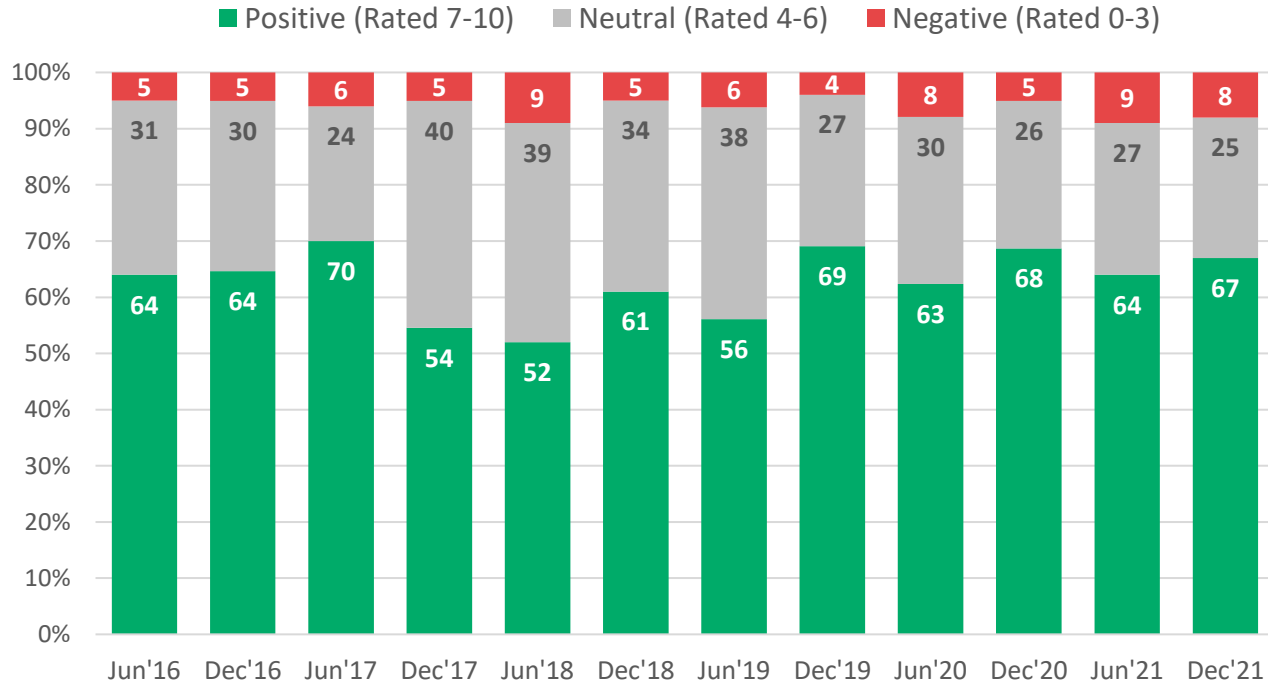
Confidence in advances in technology



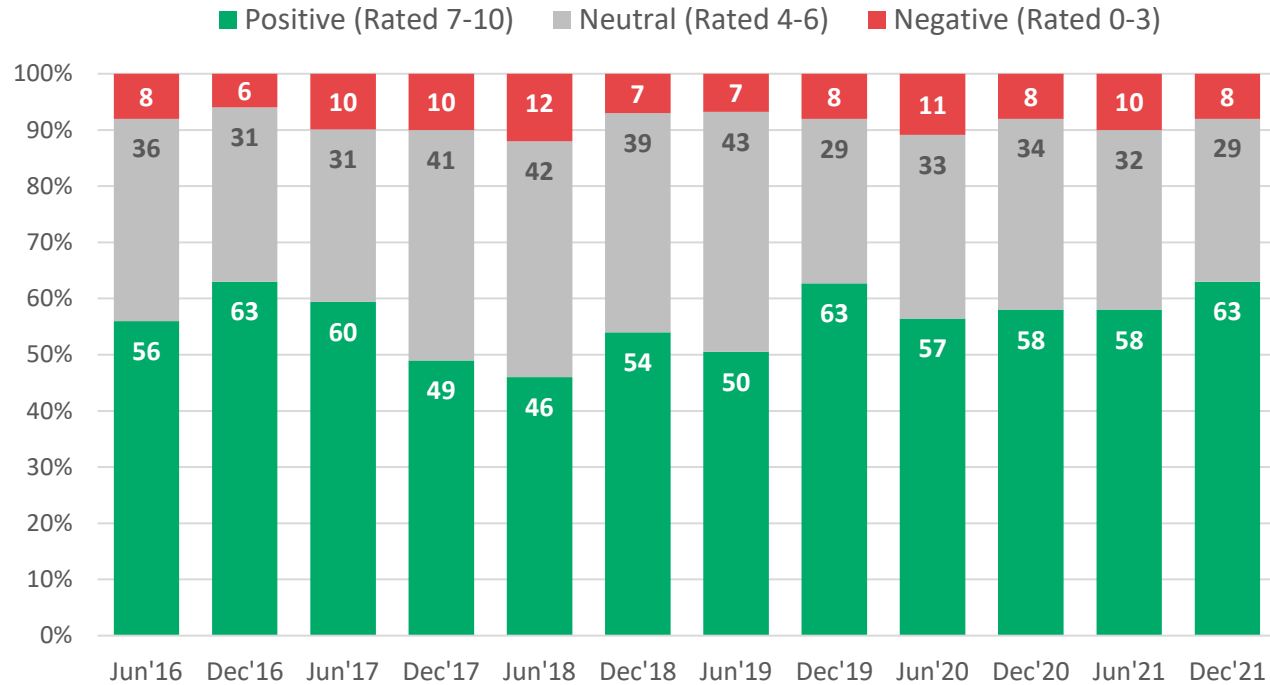
Q: Thinking about the overall market outcomes, how confident are you that the energy market will provide better outcomes for you in 5 years, in terms of...? **Make technological advances to manage your energy supply and costs**

Base size: All businesses (min. n=280)

Confidence in ability to make choices



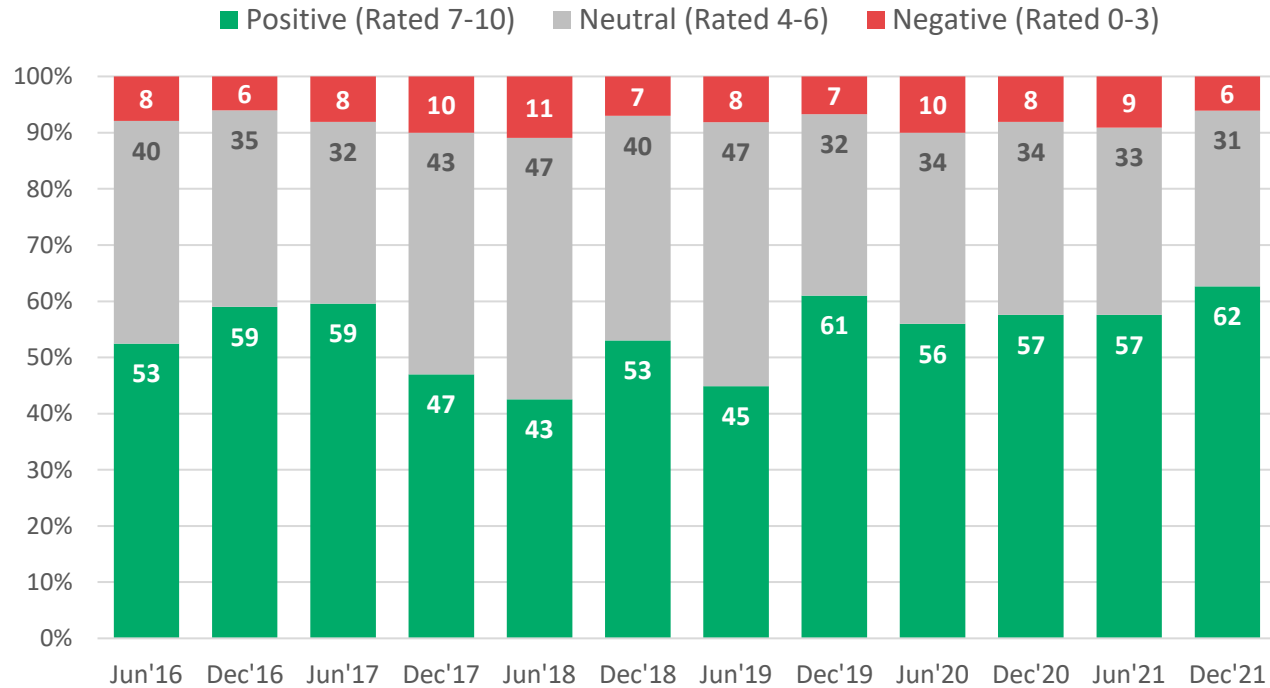
Confidence in availability of enough easily understood information



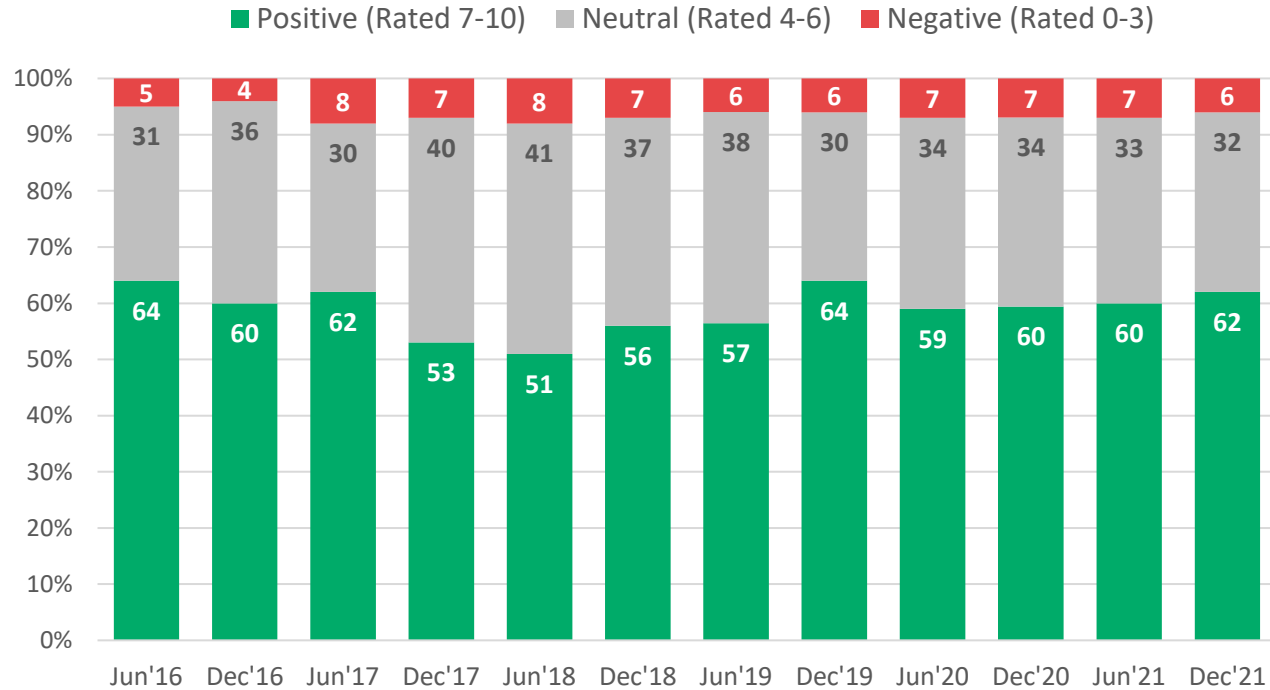
Q: How confident do you feel in the following...? **That there is enough easily understood information available to you to make decisions about energy products and services, by which we mean information available on the internet, through energy comparison websites or elsewhere**

Base size: All businesses (min. n=280)

Confidence in availability of tools



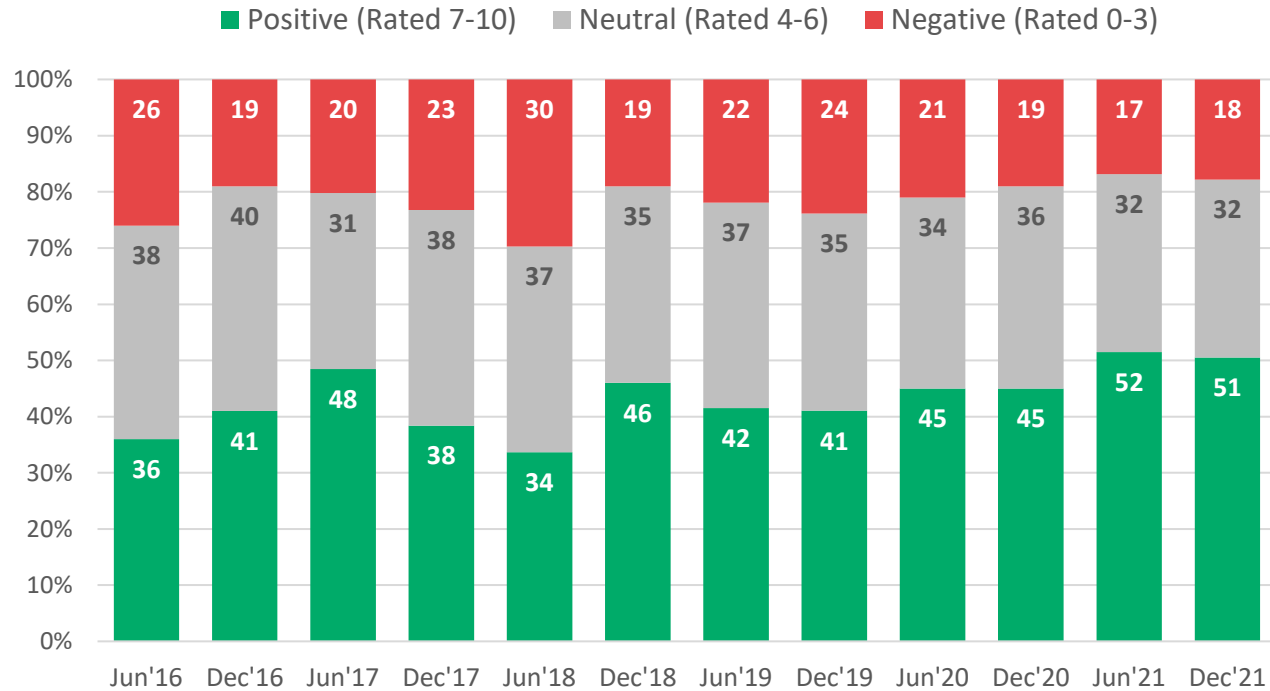
Confidence to get problems resolved

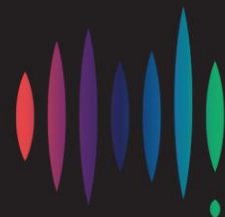


Q: How confident do you feel in the following...? **Your ability to get a problem with your energy services resolved through your energy company or a third party**

Base size: All businesses (min. n=280)

Confidence in the market





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