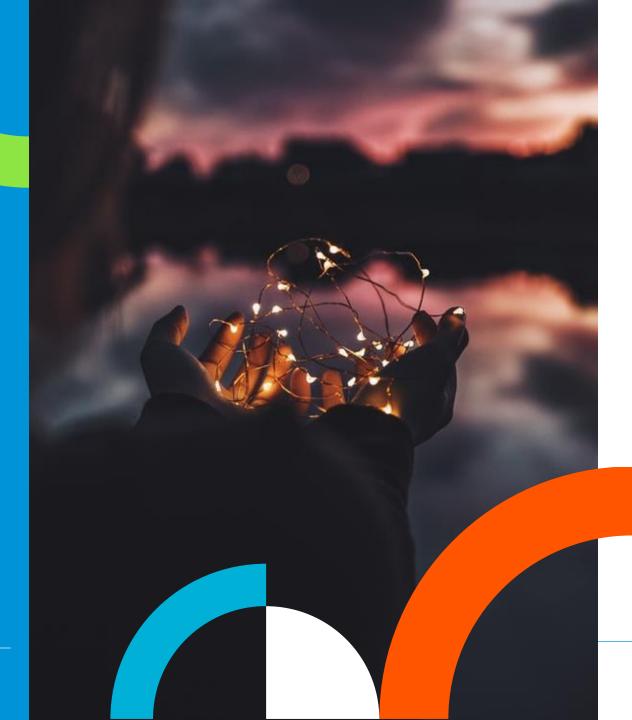
Quantum Market Research

Customer Experience Monitor – Wave 1 2021

CitiPower / Powercor / United Energy



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Quantum Market Research

CitiPower/Powercor/ Customer Experience Monitor, W1 2021, May, 2021

Quantitative Methodology

\circ —

Surveys conducted via a mix of online (via email and SMS invites) and telephone.



Fieldwork conducted from the 20th of April to the 17th of May 2021.



Average survey length: 5-10 minutes



All sample provided by CitiPower / Powercor / United Energy.



All respondents invited to enter a prize draw for a \$500 GiftPay voucher.

Average interview length (minutes)	Online	Phone
Planned interruptions	5	-
Unplanned interruptions	4	-
Quality of supply	7	10.5
Phone enquiry	5	9.5
Customer projects	6	9.5
Vegetation management	4	5.5
No Go Zone	9	10.5
Claims/complaints	7	9.5
Solar / Embedded Generation	6	8.5

Who we spoke to

The number of interviews achieved by event and distributor is shown in these tables.

The target number of interviews per event per distributor was as follows:

- 40 per distributor for CI Augmentation Projects
- 40 for CitiPower for Vegetation Management
- 80 for all other event x distributor combinations

	Total number of respondents n=	Interviewed by telephone n=	Interviewed online n=
United Energy	663	184	479
Planned Interruptions	85	-	85
Unplanned Interruptions	94	-	94
Quality of Supply	15	10	5
Phone Enquiry	83	17	66
CI Augmentation Projects	47	16	31
Vegetation Management	104	41	63
No Go Zone	46	40	6
Claims / Complaints	82	40	42
Solar / Embedded Generation	107	20	87

	Total number of respondents n=	Interviewed by telephone n=	Interviewed online n=
CitiPower	540	193	347
Planned Interruptions	89	-	89
Unplanned Interruptions	84	-	84
Quality of Supply	4	3	1
Phone Enquiry	95	27	68
CI Augmentation Projects	45	27	18
Vegetation Management	53	29	24
No Go Zone	51	40	11
Claims / Complaints	34	27	7
Solar / Embedded Generation	85	40	45
Powercor	894	208	686
Planned Interruptions	93	-	93
Unplanned Interruptions	90	-	90
Quality of Supply	42	26	16
Phone Enquiry	100	-	100
CI Augmentation Projects	100	5	95
Vegetation Management	117	60	57
No Go Zone	58	40	18
Claims / Complaints	84	40	44
Solar / Embedded Generation	210	37	173

CitiPower/Powercor/ United Energy Indicates cells that did not achieve target quotas

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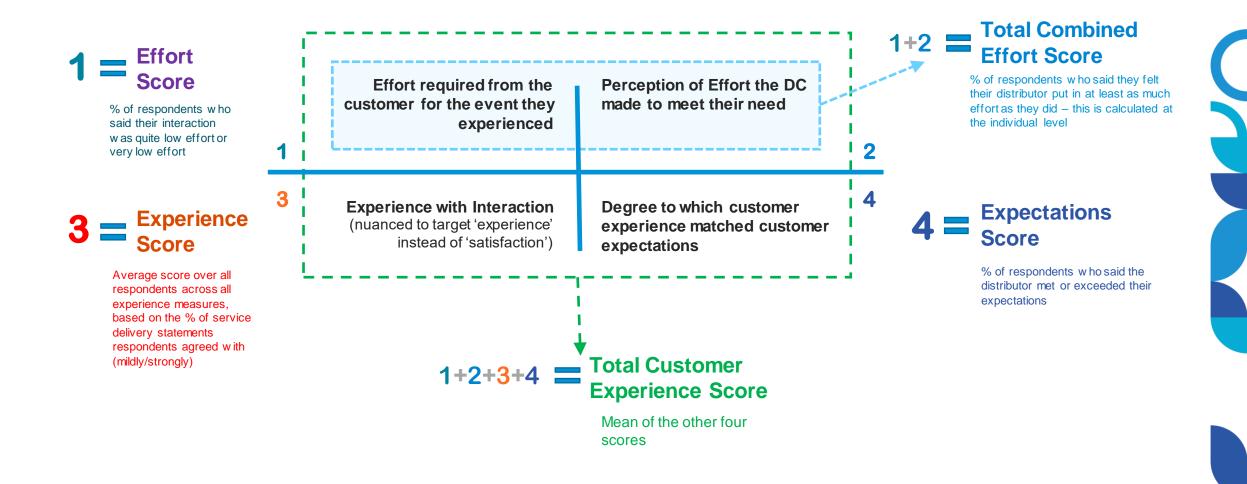
Summary of results

CitiPower/Powercor/ United Energy

Customer Experience Monitor, W1 2021, May, 2021

Key Metrics

United Energy



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How the overall metrics are calculated

- Each of the three key metrics are reported for each customer event, for each ٠ distributor.
- A weighted average is also calculated for each metric for each distributor over all nine ٠ events. The weighting applied to each event is shown to the right.

Planned Interruptions 15% **Unplanned Interruptions** 15% **Quality of Supply** 5% **Phone Enquiry** 15% **CI** Augmentation **Projects** 10% **Vegetation Management** 15% No Go Zone 10% Claim/Complaints 5% Solar / Embedded Generation 10% **Overall Score** Weighted average

United Energy

CitiPower over time

	Effort	Effort Score		Total Combined Effort Score		Experience Score		Expectations Score		Total Customer Experience Score	
	2020 Wave 2	2021 Wave 1	2020 Wave 2	2021 Wave 1	2020 Wave 2	2021 Wave 1	2020 Wave 2	2021 Wave 1	2020 Wave 2	2021 Wave 1	
Planned Interruptions	68%	72%	94%	90%	98%	95%	90%	90%	88%	87%	
Unplanned Interruptions	55%	66%	90%	95%	86%	72% 🗸	94%	77% 🕂	81%	78%	
Quality of Supply	36%	50%	64%	67%	67%	50%	55%	75%	56%	60%	
Phone Enquiry	51%	54%	86%	89%	90%	91%	84%	94% 介	78%	82%	
CI Augmentation Projects	30%	27%	70%	75%	74%	76%	67%	72%	60%	62%	
Vegetation Management	83%	82%	86%	100%	63%	63%	76%	77%	77%	80%	
No Go Zone	47%	27%	89%	92%	91%	98%	93%	96%	80%	78%	
Claim/Complaints	36%	21%	45%	36%	45%	62%	55%	39%	45%	40%	
Solar / Embedded Generation	54%	42%	70%	71%	70%	70%	70%	74%	66%	64%	
Overall Score	55%	54%	82%	85%	80%	78%	80%	81%	71%	75%	

CitiPower/Powercor/ **United Energy**



Powercor over time

	Effort	Effort Score		Total Combined Effort Score		Experience Score		Expectations Score		Total Customer Experience Score	
	2020 Wave 2	2021 Wave 1	2020 Wave 2	2021 Wave 1	2020 Wave 2	2021 Wave 1	2020 Wave 2	2021 Wave 1	2020 Wave 2	2021 Wave 1	
Planned Interruptions	69%	64%	99%	91% 🕂	97%	99%	96%	96%	90%	87%	
Unplanned Interruptions	51%	48%	91%	94%	82%	90%	81%	94% 1	76%	81%	
Quality of Supply	44%	43%	81%	82%	76%	79%	68%	70%	67%	68%	
Phone Enquiry	55%	51%	85%	89%	95%	87% 🗸	91%	85%	82%	78%	
CI Augmentation Projects	44%	36%	84%	78%	79%	77%	79%	74%	72%	66%	
Vegetation Management	73%	70%	92%	85%	83%	73%	81%	74%	82%	75%	
No Go Zone	49%	31%	85%	79%	93%	86%	91%	82%	80%	70%	
Claim/Complaints	28%	29%	64%	51%	74%	63%	58%	50%	56%	48%	
Solar / Embedded Generation	51%	44%	83%	82%	77%	76%	81%	82%	73%	71%	
Overall Score	55%	50%	88%	84%	86%	83%	84%	82%	78%	75%	

CitiPower/Powercor/ **United Energy**



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United Energy over time

onited Energy		Score	Total Comb Sco	oined Effort ore	Experien	ice Score	Expectati	ons Score		ustomer ice Score
	2020 Wave 2	2021 Wave 1	2020 Wave 2	2021 Wave 1	2020 Wave 2	2021 Wave 1	2020 Wave 2	2021 Wave 1	2020 Wave 2	2021 Wave 1
Planned Interruptions	63%	67%	92%	95%	99%	98%	88%	93%	86%	88%
Unplanned Interruptions	41%	49%	88%	90%	65%	67%	77%	81%	68%	72%
Quality of Supply	37%	27%	70%	57%	63%	73%	64%	57%	59%	54%
Phone Enquiry	59%	44%	86%	87%	87%	89%	87%	90%	80%	78%
CI Augmentation Projects	41%	43%	78%	64%	88%	64% 🕂	88%	72% 🕂	74%	61%
Vegetation Management	77%	80%	95%	92%	76%	78%	78%	77%	82%	82%
No Go Zone	41%	37%	91%	91%	94%	100%	98%	96%	81%	81%
Claim/Complaints	28%	27%	53%	54%	52%	52%	38%	44%	43%	44%
Solar / Embedded Generation	40%	50%	79%	78%	84%	73%	80%	82%	71%	71%
Overall Score	51%	52%	85%	80%	81%	80%	81%	81%	75%	74%



Making things less effortful for customers

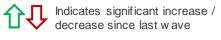
CitiPower/Powercor/ United Energy

Customer Experience Monitor, W1 2021, May, 2021

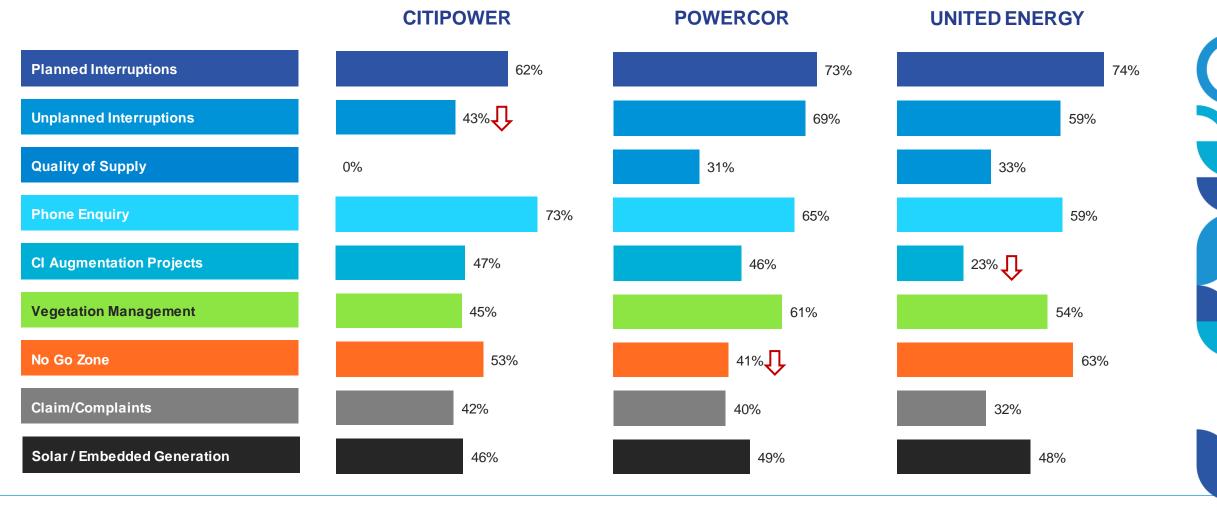
% who found the interaction low/very low effort

	CITIP	OWER	POWE	RCOR	UNITED ENERGY		
	2020 Wave 2	2021 Wave 1	2020 Wave 2	2021 Wave 1	2020 Wave 2	2021 Wave 1	
Planned Interruptions	68%	72%	69%	64%	63%	67%	
Unplanned Interruptions	55%	66%	51%	48%	41%	49%	
Quality of Supply	36%	50%	44%	43%	37%	27%	
Phone Enquiry	51%	54%	55%	51%	59%	44%	
CI Augmentation Projects	30%	27%	44%	36%	41%	43%	
Vegetation Management	83%	82%	73%	70%	77%	80%	
No Go Zone	47%	27% 🕂	49%	31%	41%	37%	
Claim/Complaints	36%	21%	28%	29%	28%	27%	
Solar / Embedded Generation	54%	42%	51%	44%	40%	50%	
Overall Score	55%	54%	55%	50%	51%	52%	

CitiPower/Powercor/ United Energy



Many customers didn't feel more could be done to make the process easier for them



CitiPower/Powercor/ United Energy Indicates significant difference from other distributors

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What are the top ways in which distributors can make it easier for customers?

POWERCOR

CITIPOWER

			10112				
	Top mention	Second mention	_				
Planned Interruptions	Better communication 18%	Better / clearer information 3%	Better communication 14%	Less outages 4%	Better communication 8%	Better / clearer information 7%	
Unplanned Interruptions	Better communication 27%	Better / clearer information 6%	Better communication 14%	Better / clearer information 9%	Better communication 19%	Better / clearer information 11%	
Quality of Supply	Improve response time 75%	Improve call centre service 25%	Better / clearer information 29%	Better communication 24%	Better / clearer information27%	Expand solar capacity 20%	
Phone Enquiry	Improve call centre service 5%	Better communication 4%	Improve response time 9%	Better communication 6%	Resolve the issue 11%	Better communication 8%	
CI Augmentation Projects	Better communication 13%	Improve response time 9%	Better / clearer information 14%	Better communication 11%	Better communication 34%	Better / clearer information 17%	
Vegetation Management	Better communication 28%	Better standard of pruning 8%	Better communication 11%	Better standard of pruning 10%	Better communication 13%	Clean up / don't damage property 11%	
No Go Zone	Improve response time 18%	Better / clearer information 8%	Improve response time 22%	Better customer service 10%	Better communication 11%	Improve response time 11%	
Claim/Complaints	Provide compensation 15%	Better customer service 12%	Take responsibility 15%	Better customer service 14%	Better customer service 17%	Improve response time 15%	
Solar / Embedded Generation	Better / clearer information 13%	Expand solar capacity 13%	Better / clearer information 12%	Better communication 8%	Better / clearer information 17%	Better communication 7%	

UNITED ENERGY

Better communication was mentioned across all processes other than claims/complaints

POWFRCOR

CITIPOWER

	CITPOWER		POWE	RCOR	UNITED ENERGY		
	Top mention	Second mention					
Planned Interruptions	Better communication 18%	Better / clearer information 3%	Better communication 14%	Less outages 4%	Better communication 8%	Better / clearer information 7%	
Unplanned Interruptions	Better communication 27%	Better / clearer information 6%	Better communication 14%	Better / clearer information 9%	Better communication 19%	Better / clearer information 11%	
Quality of Supply	Improve response time 75%	Improve call centre service 25%	Better / clearer information 29%	Better communication 24%	Better / clearer information27%	Expand solar capacity 20%	
Phone Enquiry	Improve call centre service 5%	Better communication 4%	Improve response time 9%	Better communication 6%	Resolve the issue 11%	Better communication 8%	
CI Augmentation Projects	Better communication 13%	Improve response time 9%	Better / clearer information 14%	Better communication 11%	Better communication 34%	Better / clearer information 17%	
Vegetation Management	Better communication 28%	Better standard of pruning 8%	Better communication 11%	Better standard of pruning 10%	Better communication 13%	Clean up / don't damage property 11%	
No Go Zone	Improve response time 18%	Better / clearer information 8%	Improve response time 22%	Better customer service 10%	Better communication 11%	Improve response time 11%	
Claim/Complaints	Provide compensation 15%	Better customer service 12%	Take responsibility 15%	Better customer service 14%	Better customer service 17%	Improve response time 15%	
Solar / Embedded Generation	Better / clearer information 13%	Expand solar capacity 13%	Better / clearer information 12%	Better communication 8%	Better / clearer information 17%	Better communication 7%	

CitiPower/Powercor/ United Energy UNITED ENERGY

Better, clearer or more detailed information was the second most mentioned

POWERCOR

CITIPOWER UNITED ENERGY **Top mention** Second mention Better / clearer **Planned Interruptions** Better communication Better / clearer Better communication Better communication Less outages 4% 18% information 3% 14% 8% information 7% Better communication Better / clearer Better / clearer Better communication Better / clearer **Unplanned Interruptions** Better communication 27% 19% information 6% information 9% information 11% 14% Improve call centre Expand solar capacity Improve response time Better / clearer Better communication Better / clearer **Quality of Supply** 75% service 25% information 29% information27% 20% 24% Better communication Improve call centre Improve response time Better communication Better communication **Phone Enguiry** Resolve the issue 11% 8% service 5% 4% 9% 6% Better communication Improve response time Better communication Better communication Better / clearer Better / clearer **CI** Augmentation Projects information 17% 9% 34% 13% information 14% 11% Better communication Better standard of Better communication Clean up / don't Better communication Better standard of **Vegetation Management** 28% pruning 8% pruning 10% 13% damage property 11% 11% Better / clearer Improve response time Better communication Improve response time Improve response time Better customer No Go Zone information 8% 18% 22% 11% 11% service 10% Provide compensation Better customer Take responsibility Better customer Improve response time Better customer Claim/Complaints 15% 15% service 12% 15% service 17% service 14% Better / clearer Expand solar capacity Better communication Better / clearer Better / clearer Better communication Solar / Embedded Generation information 17% information 13% 13% information 12% 8% 7%

CitiPower/Powercor/ **United Energy**

Response times could be improved, particularly for No Go Zone

	CITIPOWER		POWE	RCOR	UNITED ENERGY		
	Top mention	Second mention					
Planned Interruptions	Better communication 18%	Better / clearer information 3%	Better communication 14%	Less outages 4%	Better communication 8%	Better / clearer information 7%	
Unplanned Interruptions	Better communication 27%	Better / clearer information 6%	Better communication 14%	Better / clearer information 9%	Better communication 19%	Better / clearer information 11%	
Quality of Supply	Improve response time 75%	Improve call centre service 25%	Better / clearer information 29%	Better communication 24%	Better / clearer information27%	Expand solar capacity 20%	
Phone Enquiry	Improve call centre service 5%	Better communication 4%	Improve response time 9%	Better communication 6%	Resolve the issue 11%	Better communication 8%	
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Vegetation Management	Better communication 28%	Better standard of pruning 8%	Better communication 11%	Better standard of pruning 10%	Better communication 13%	Clean up / don't damage property 11%	
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Claim/Complaints	Provide compensation 15%	Better customer service 12%	Take responsibility 15%	Better customer service 14%	Better customer service 17%	Improve response time 15%	
Solar / Embedded Generation	Better / clearer information 13%	Expand solar capacity 13%	Better / clearer information 12%	Better communication 8%	Better / clearer information 17%	Better communication 7%	

CitiPower/Powercor/ United Energy

Better customer service – more knowledgeable and helpful staff – was particularly sought by those making a claim or complaint

POWERCOR

CITIPOWER

	Top mention	Second mention				
Planned Interruptions	Better communication 18%	Better / clearer information 3%	Better communication 14%	Less outages 4%	Better communication 8%	Better / clearer information 7%
Unplanned Interruptions	Better communication 27%	Better / clearer information 6%	Better communication 14%	Better / clearer information 9%	Better communication 19%	Better / clearer information 11%
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Solar / Embedded Generation	Better / clearer information 13%	Expand solar capacity 13%	Better / clearer information 12%	Better communication 8%	Better / clearer information 17%	Better communication 7%

UNITED ENERGY

Are we meeting customer expectations?

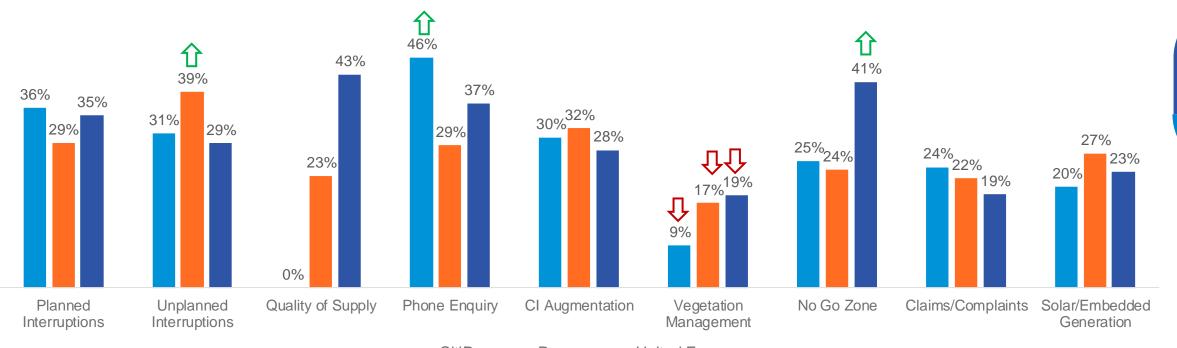
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CitiPower/Powercor/ Customer Experience Monitor, W1 2021, May, 2021

United Energy

Across most processes we are exceeding expectations for a significant proportion of customers

Percentage of customers who said their distributor significantly or slightly exceeded their expectations



CitiPower Powercor United Energy

How are we exceeding expectations?

Unplanned Interruptions POWERCOR

Good communication (73%)

Resolved issue quickly / within or before the expected time (36%)

Expectations have been met by early notification communications and achieving power restoration within reasonable times.

Informed me multiple times about the supply interruption and the progress on returning supply.

United Energy

Phone Enquiry CITIPOWER

Good service / polite / helpful / professional (56%)

Prompt response / resolved issue quickly (44%)

The person I spoke to understood me immediately, explained clearly the facts, and it related to how solar power commits to your system and how CitiPower may restrict the amount of the solar power you could put in and I didn't understand why they had rules like that and the query as well explained

No Go Zone UNITED ENERGY

Prompt response / resolved issue quickly (58%)

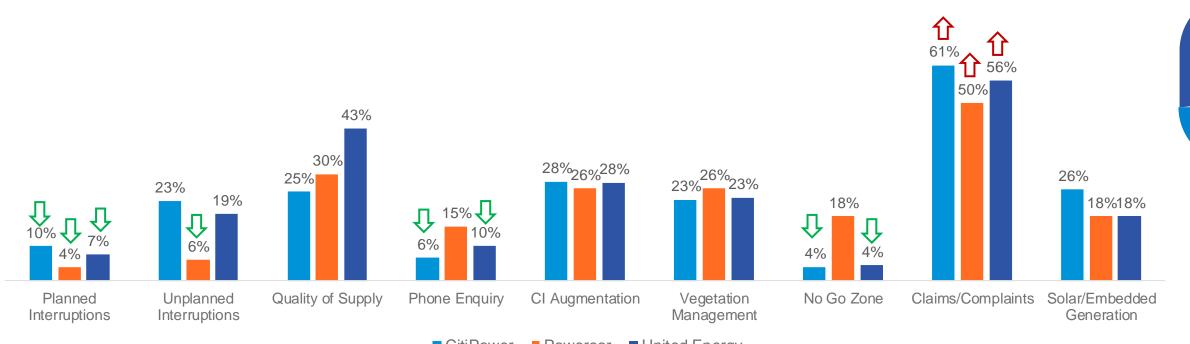
They were very prompt after I lodged it online in getting back and responding to me, the inspector was out here within a day, so it was all just very quick and easy.

They got it done when they said they would, which is rare these days.

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Unsurprisingly, claims and complaints most often fell below expectations

Percentage of customers who said their distributor significantly or slightly fell below their expectations



CitiPower Powercor United Energy

Where are we falling below expectations?

Quality of Supply	CI Augmentation Projects	Vegetation Management	Claim/Complaints	Solar / Embedded Generation
Poor communication 47%	Poor service / incorrect information / uncaring 39%	Damaged property / trees / did not clean up 74%	Poor service / incorrect information / uncaring 39%	Poor communication 39%
Issue still unresolved/ nothing done 42%	Process longer than expected / delays 29%	Poor communication 21%	Claim rejected / no reimbursement 23%	Poor service / incorrect information / uncaring 19%
Lack of communication with a fault like this we should have been kept updated, we have not	Poor communication 27%	Left tree branches everywhere with no sign of clean up and was done while snakes were still	Issue still not resolved / nothing done 20%	Process longer than expected / delays 13%
			Process longer than expected / delays 20%	Issue still not resolved / nothing done 17%
seen anyone to come and our work on the problem. I was advised with a time frame and it wasn't	Initial information given was not correct and when phoning it took a few goes from a few people to get the right info.	around in the country! Did half a job, left a heap	Didn't send me a link and didn't follow through on getting the process started	Not easy to communicate with staff member, was not being helpful.
complied with in that time frame.	Poor communication and delayed works.	of downed branches in my property, the contractors they use fobbed me off and were not interested in getting the chippers in.	No follow up on progress, I rang up so many times excuse was COVID 😟	Didn't notify me directly of the conditions pertaining to my solar and slab heating installations
			Percentages based on all three	distributors combined

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Summary

CitiPower/Powercor/ United Energy

Customer Experience Monitor, W1 2021, May, 2021

Summary

Most key metrics remain stable compared to the last wave of research

There have been significant declines in the Experience and Expectations scores for:

- CitiPower Unplanned Interruptions
- United Energy CI . Augmentations

United Energy

Across many processes, customers could not think of any way of making the process less effort

40%+ of customers across all three distributors had no suggestions for making the process less effort for:

- Planned and Unplanned Interruptions
- Phone Enquiries
- Vegetation Management
- No Go Zone
- Solar / Embedded Generation

There were many commonalities across processes for making the process easier for customers

The following were most frequently cited, in declining order of frequency:

- Better communication
- Better / clearer information ٠
- Improved response times
- Better customer service

We are exceeding expectations for many customers, but are falling below for others

Claims and complaints customers were most likely to be disappointed – while it may not be possible to give them all what they want, there may be an opportunity to manage expectations here.

Quantum Market Research

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