

# ENERGY CONSUMER SENTIMENT SURVEY

Small Business Topline Results  
June 2022

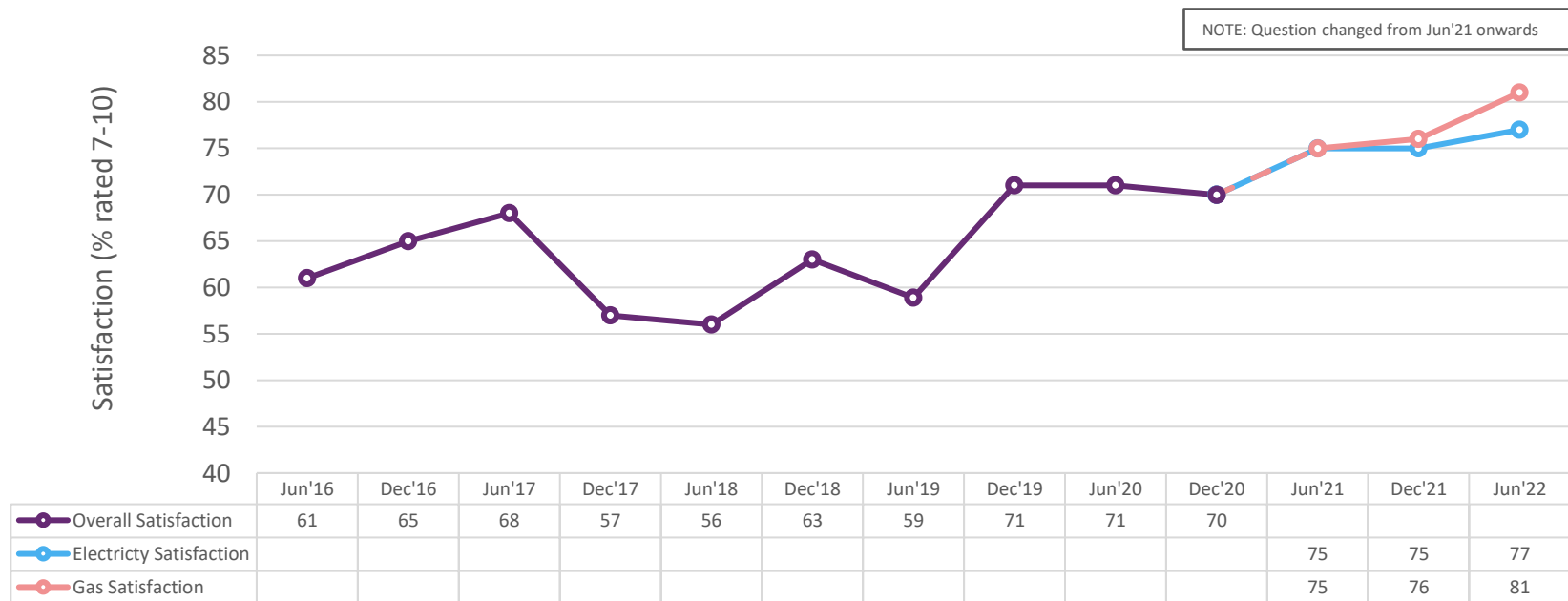


# Satisfaction

- Small business satisfaction with electricity and gas has reached historical highs, with electricity at 77% and gas at 81% (both were 75% at this time last year).
- For electricity, this increase in satisfaction has been driven by, among others, increasing satisfaction with price (60% satisfaction, up 6% from last year) communication (67%, up 6%) and customer service (71%, up 5%).
- Small businesses with gas were increasingly satisfied with their billing information (80%, up 7%) and communication (73%, up 6%) from their gas provider, and the increased competition in the market (72%, up 5%).



# Satisfaction with retailer measures: Provision of electricity and gas services

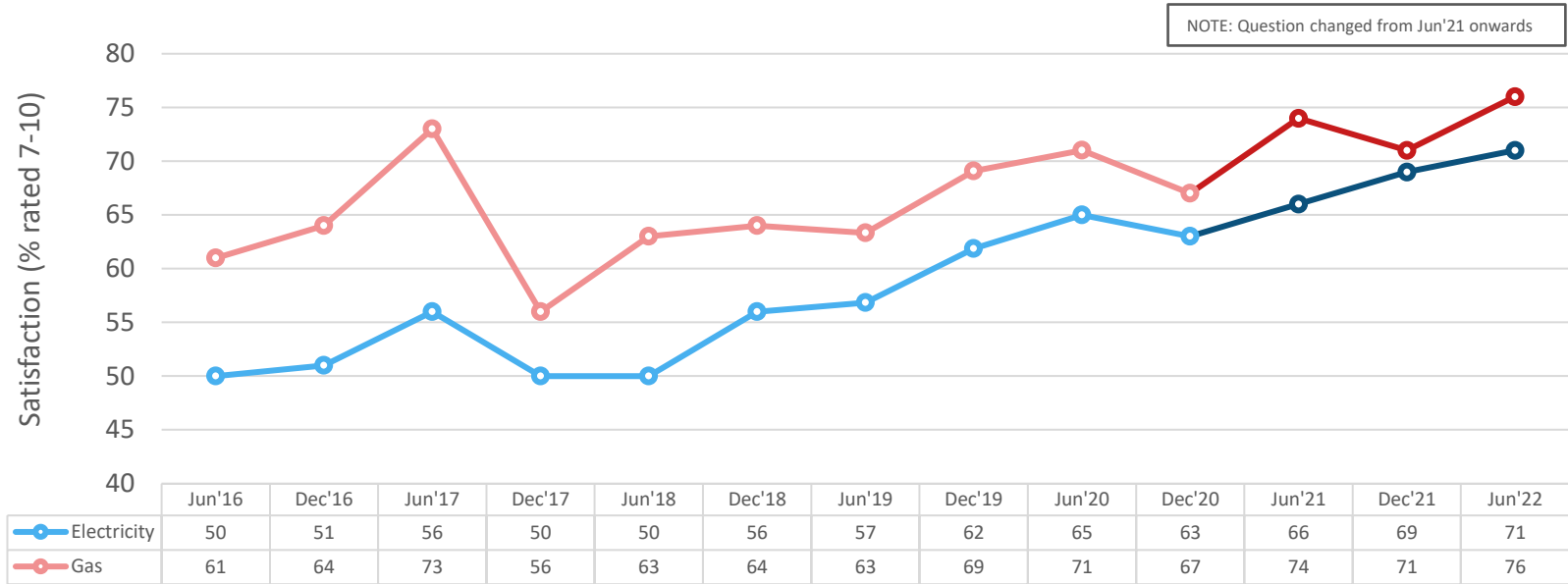


Q (Jun'16-Dec'20): How satisfied are you with the following? **The provision of your electricity and gas services overall over the last 6 months**, Base size: All businesses (min. n=280)

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



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

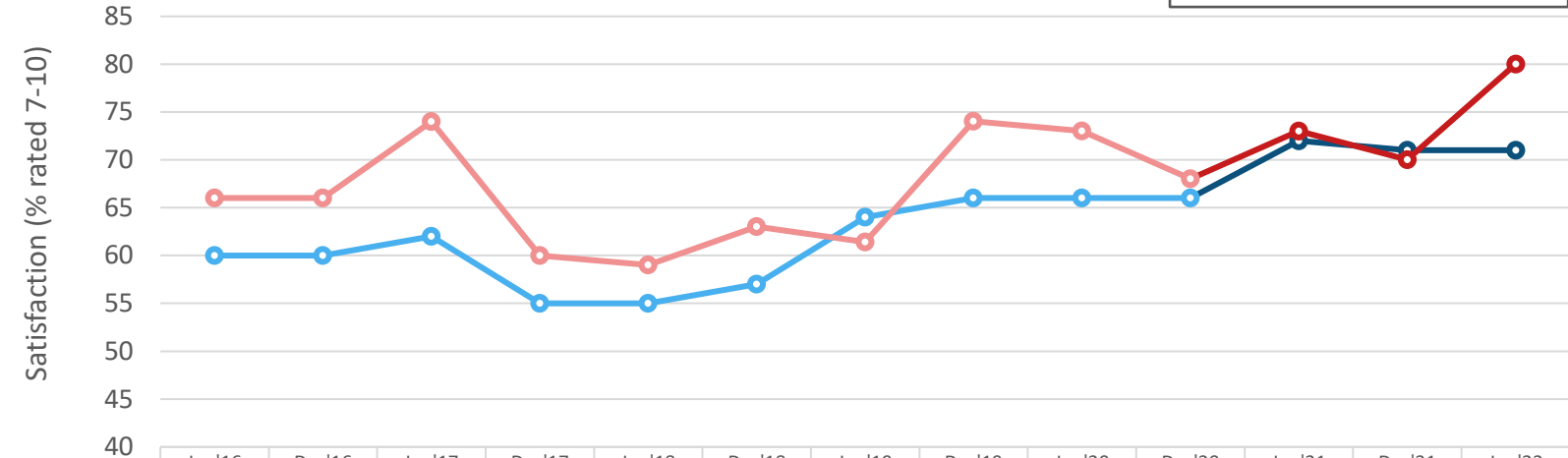
Q (from Jun'21): How satisfied are you with the following aspects of your electricity retailer in the past 6 months? **Overall customer service**, Base size: All businesses (min. n=500)

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

NOTE: Question changed from Jun'21 onwards



	Jun'16	Dec'16	Jun'17	Dec'17	Jun'18	Dec'18	Jun'19	Dec'19	Jun'20	Dec'20	Jun'21	Dec'21	Jun'22
Electricity	60	60	62	55	55	57	64	66	66	66	72	71	71
Gas	66	66	74	60	59	63	61	74	73	68	73	70	80

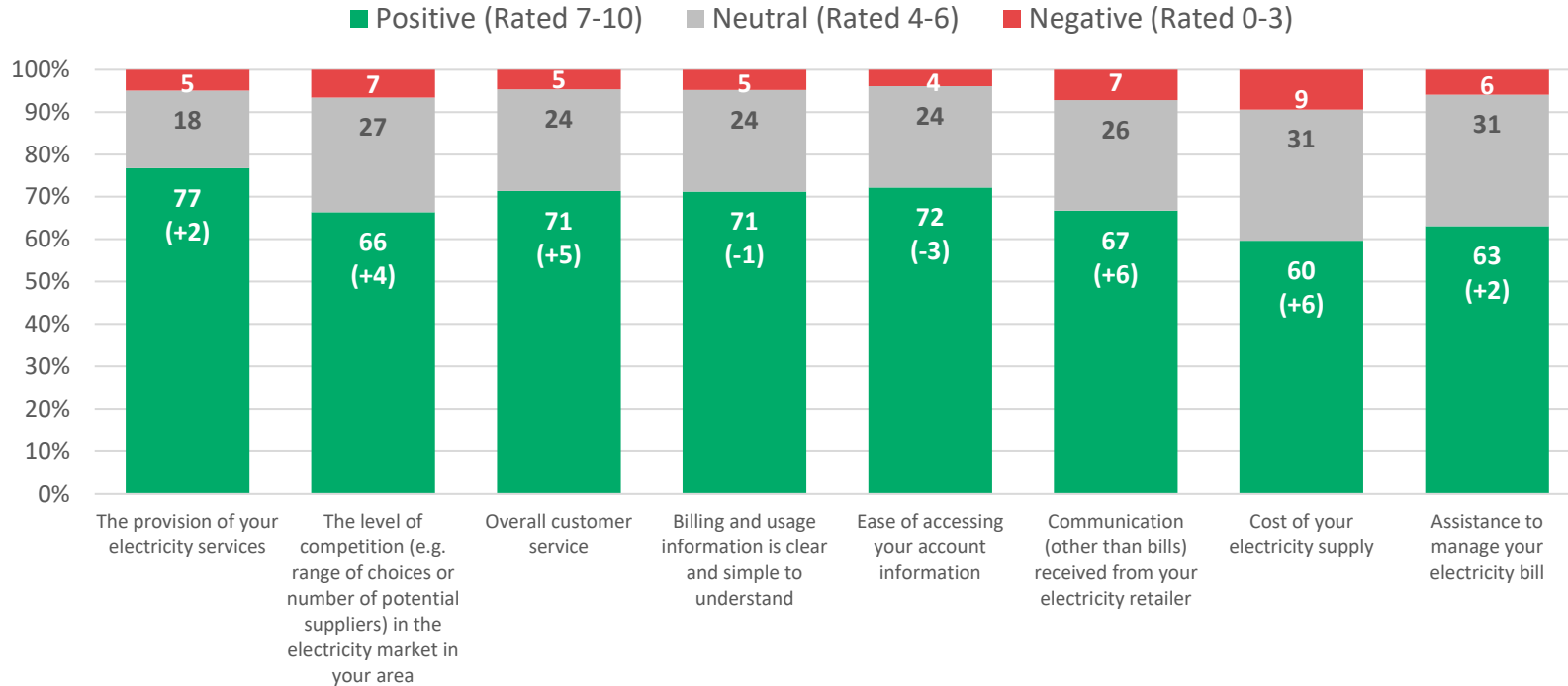
Q (Jun'16-Dec'20): How satisfied are you with the following? **The billing and account options (such as the option of monthly billing, online accounts etc.) currently available to you from your electricity supplier**, Base size: All businesses (min. n=280)

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)

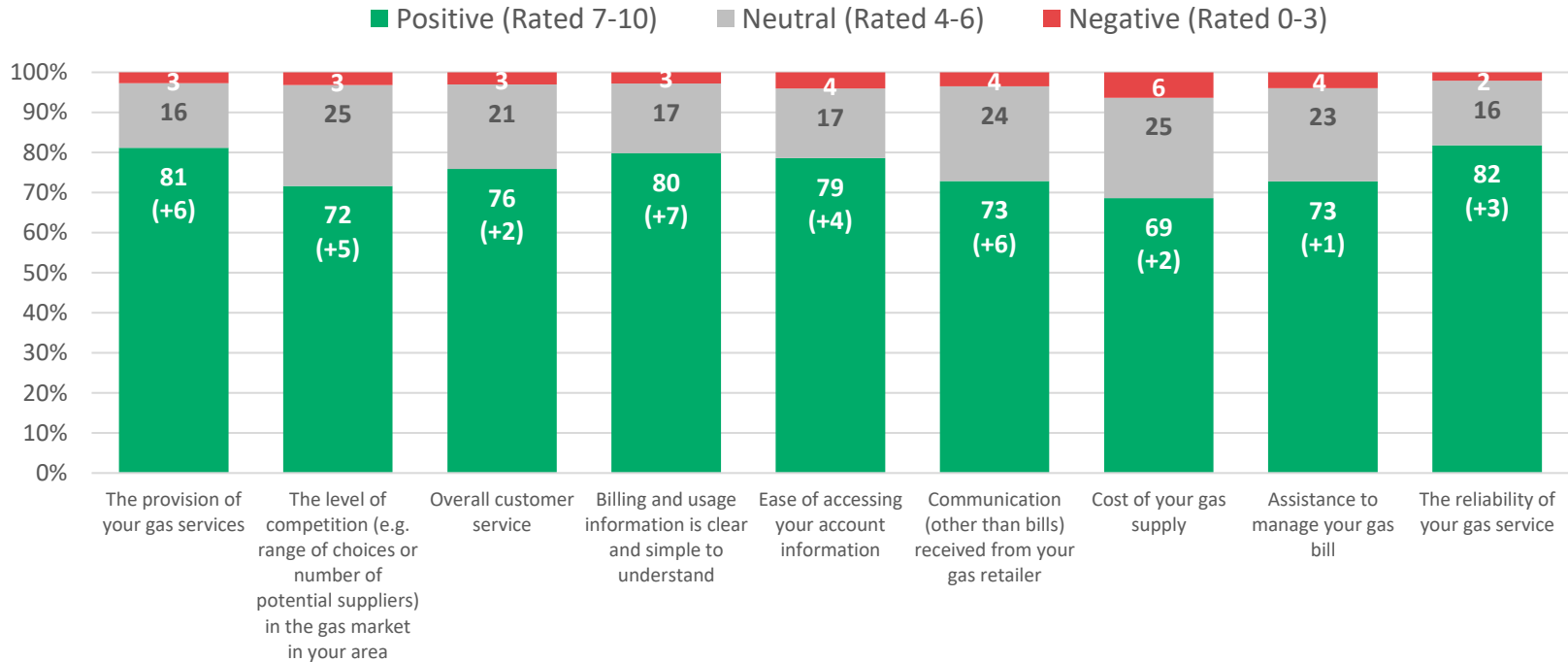
Q (Jun'16-Dec'20): How satisfied are you with the following? **The billing and account options (such as the option of monthly billing, online accounts etc.) currently available to you from your gas supplier**, Base size: All businesses with a main gas supply (min. n=199)

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 (min. n=300)

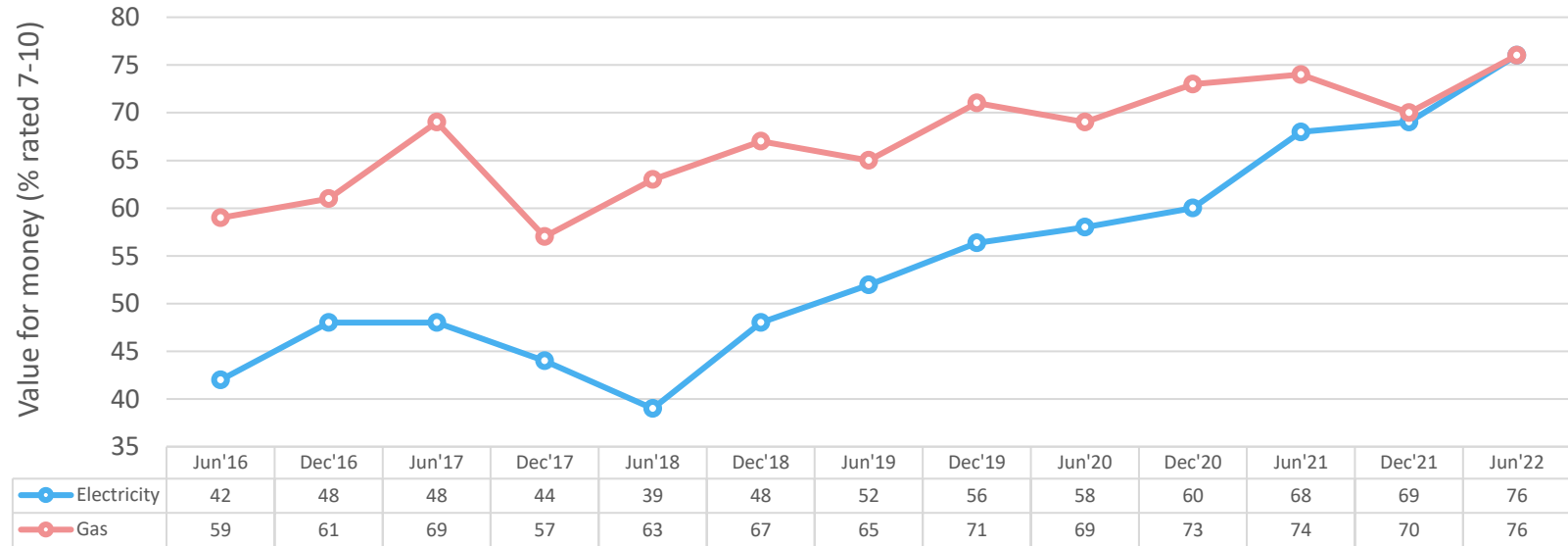
# Value for money & Outages

- Electricity value for money continues to increase from the June 2018 low. It has reached a high of 76% in June 2022.
- 76% of small businesses gave a positive rating for the value for money of their gas supply, again a historical high.
- 37% of small businesses have been affected by electricity outages in the last 6 months (32% last year).
- Of those who have experienced an outage, 63% were satisfied with the the time it took to restore power and 48% were satisfied with the communication they received from the electricity supplier during the outage.





# Value for money



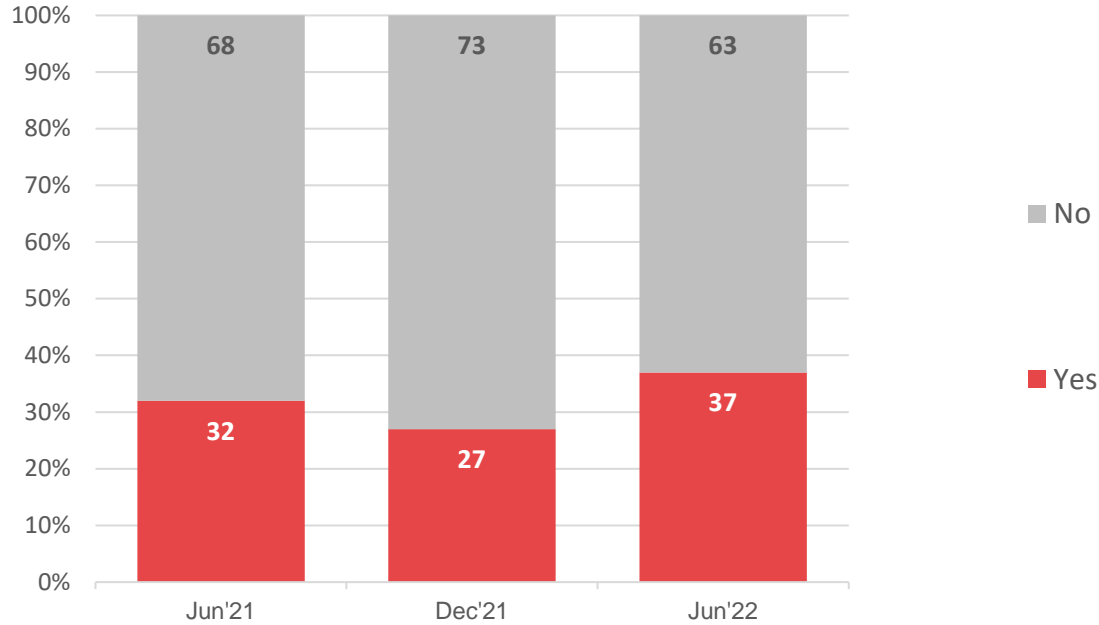
Q: How would you rate the overall value for money of the products and services provided by your electricity company in the past 6 months?

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

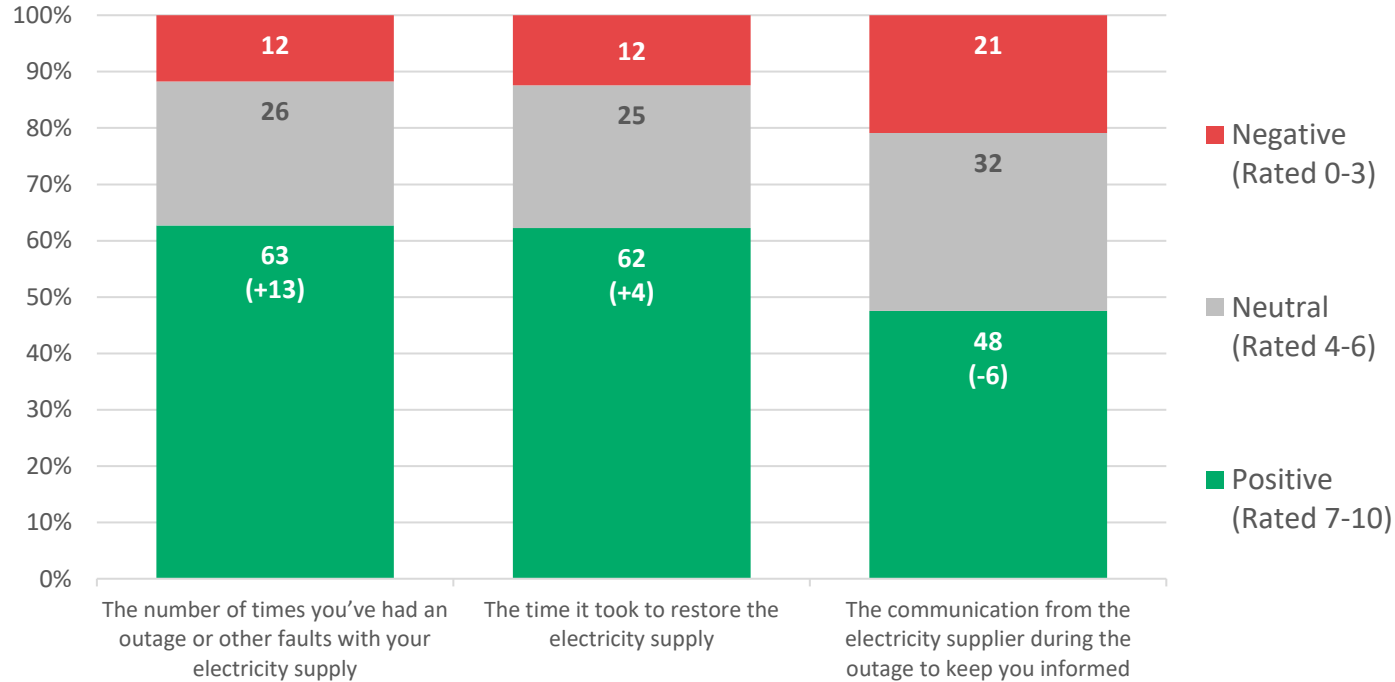
Q: How would you rate the overall value for money of the products and services provided by your gas retailer in the past 6 months?

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?

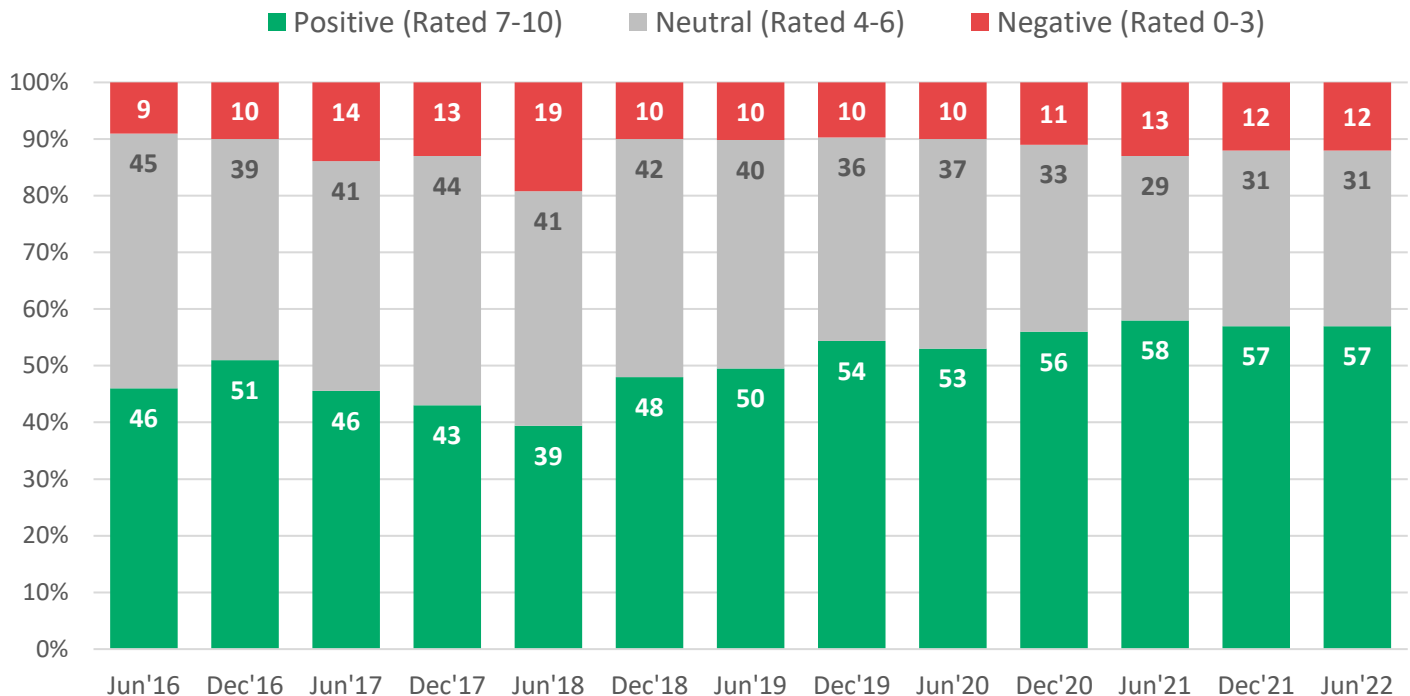
Base size: All businesses who have experienced an outage in the last 6 months (min. n=175)

# Business Confidence

- Compared to last year, there has been no change among small businesses in their confidence in advances in technology (57%, 58% last year) or the ability to make choices about energy products and services (64%, 65% last year).
- However, the following areas are now at highest recorded levels of confidence - availability of enough easily understood information (66%), the availability of the tools and assistance to manage energy use and costs (64%), ability to get problems resolved (67%) and the overall market working in your long-term interests (56%).



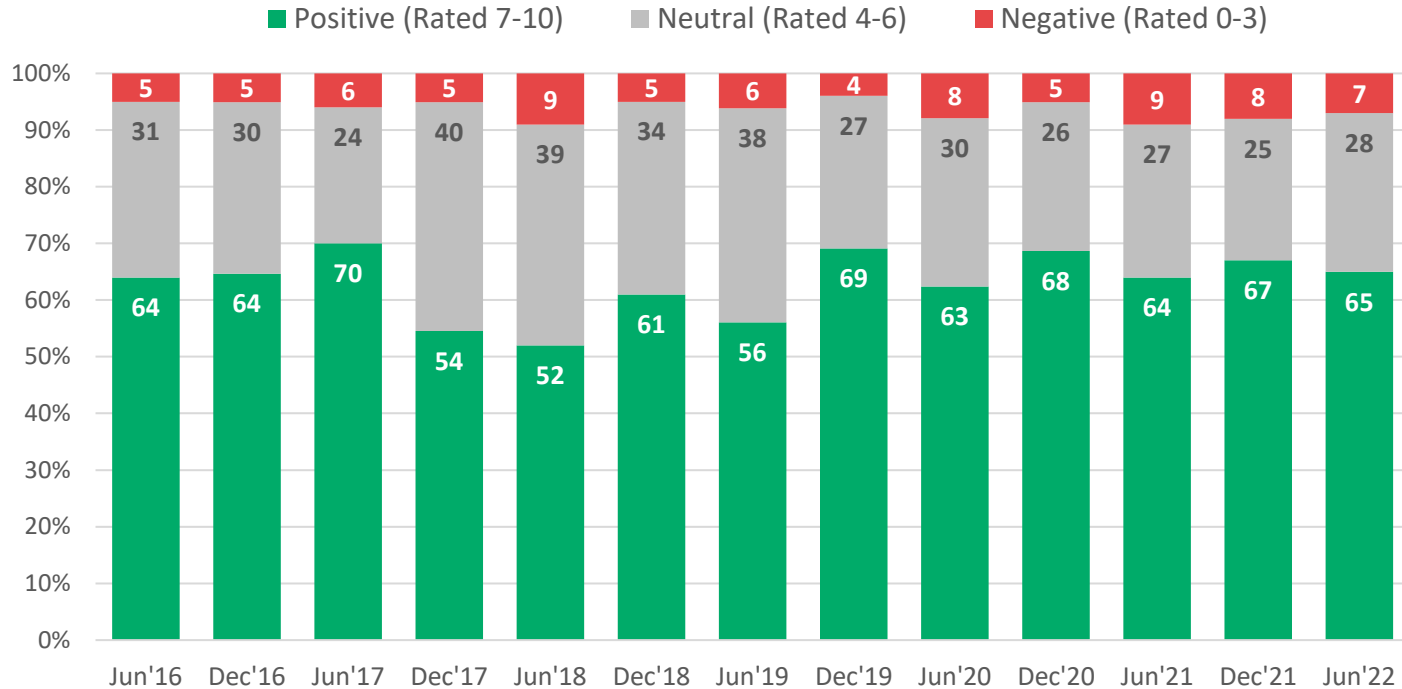
# Confidence in advances in technology



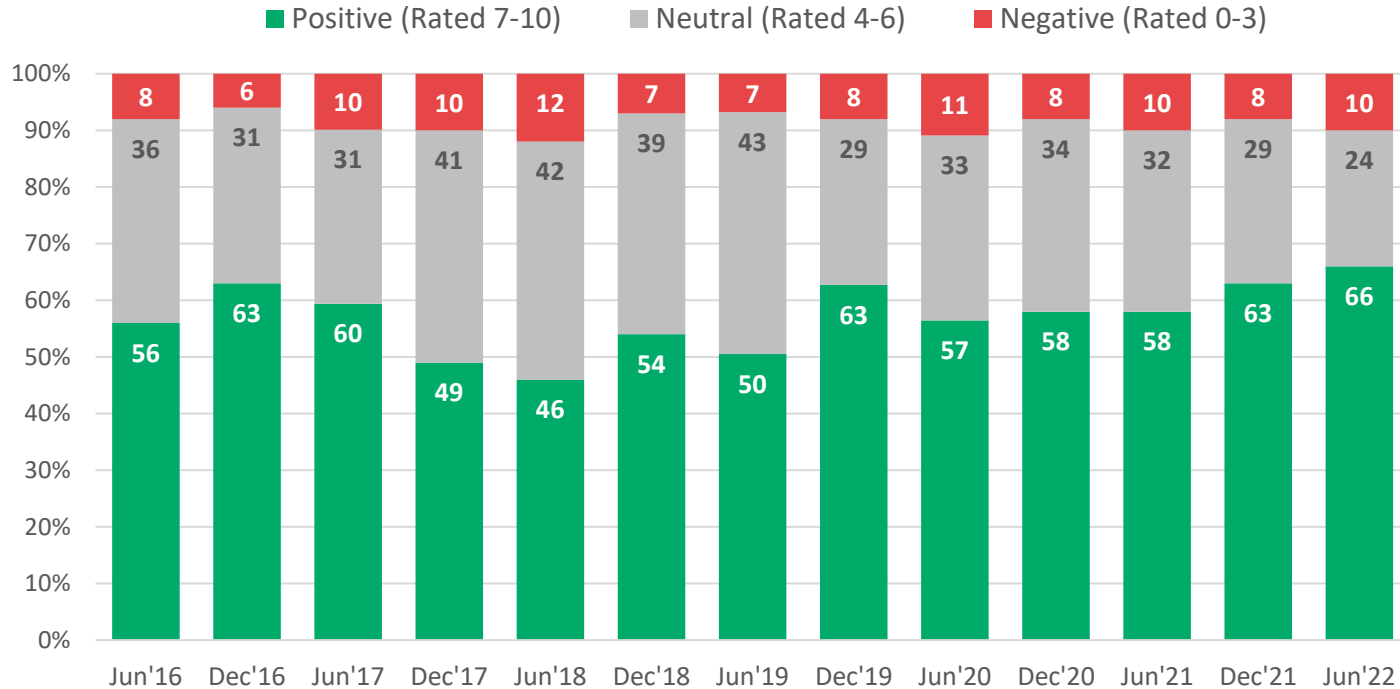
Q: Thinking about the overall market outcomes, how confident are you that the energy market will provide better outcomes for you in 5 years, in terms of...? **Make technological advances to manage your energy supply and costs**

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

# Confidence in ability to make choices



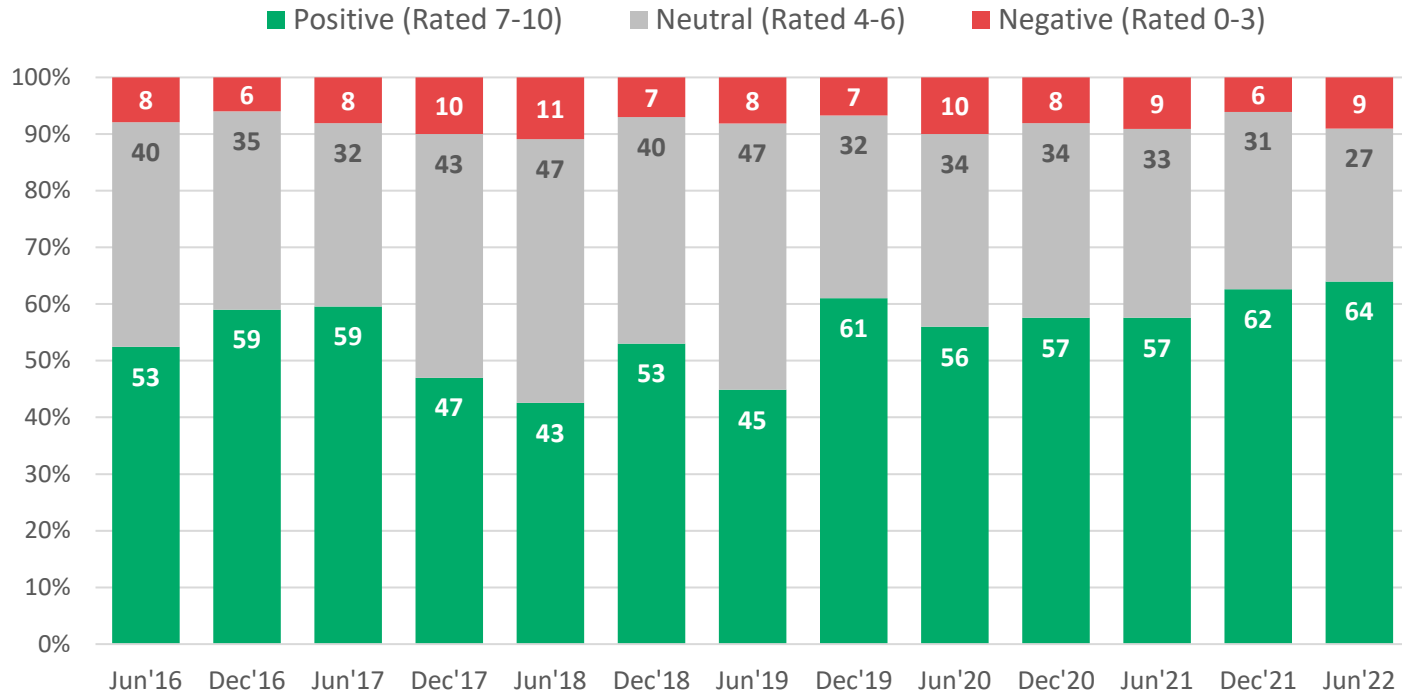
# Confidence in availability of enough easily understood information



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**

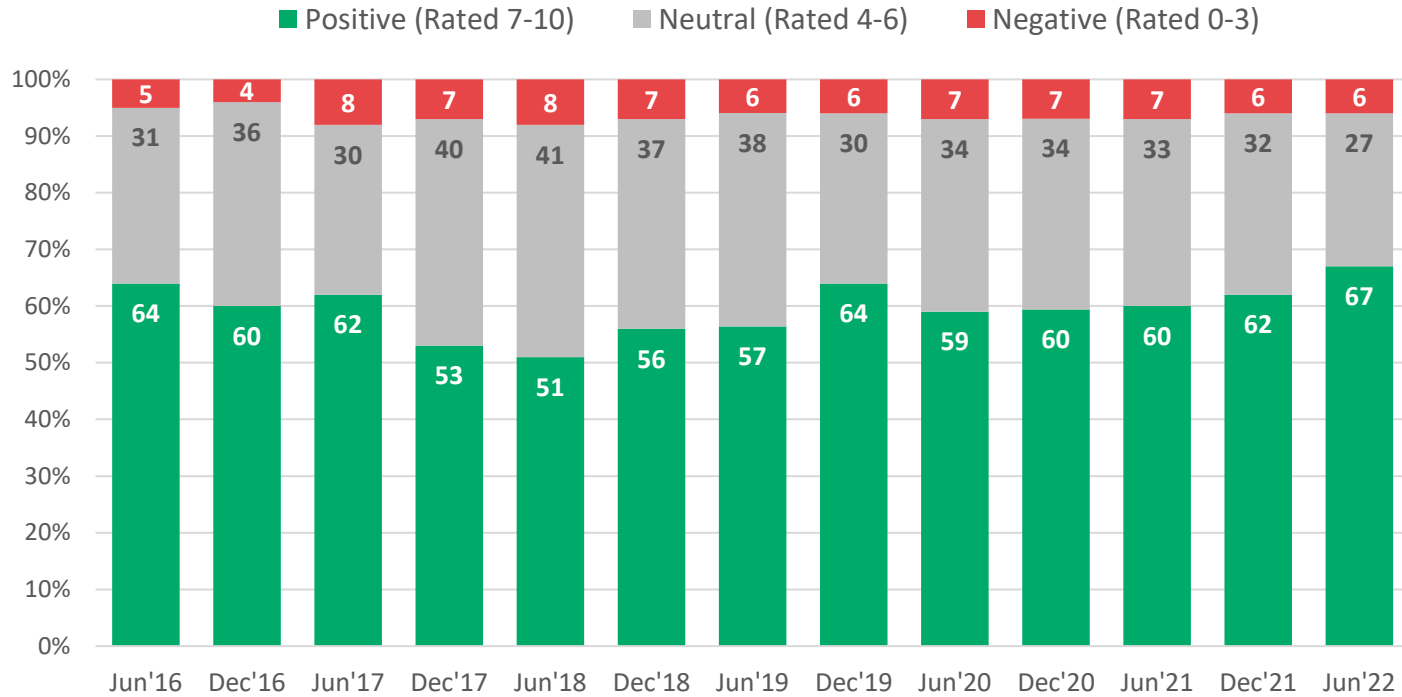
Base size: All businesses (min. n=280)

# Confidence in availability of tools





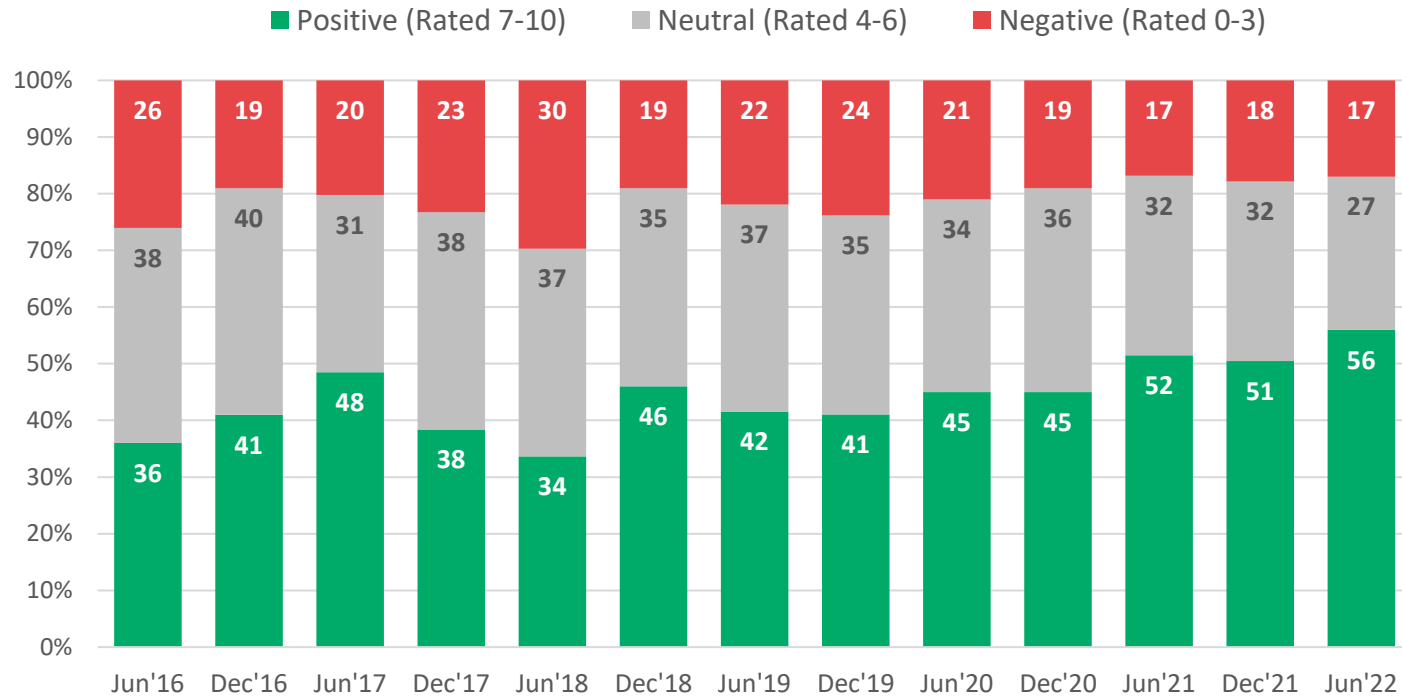
# Confidence to get problems resolved

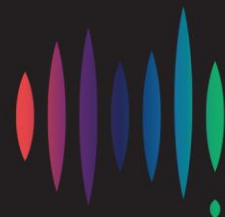


Q: How confident do you feel in the following...? **Your ability to get a problem with your energy services resolved through your energy company or a third party**

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

# Confidence in the market





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