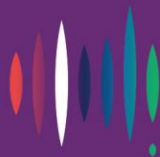


# ENERGY CONSUMER SENTIMENT SURVEY

Household Topline Results  
June 2022



ENERGY  
CONSUMERS  
AUSTRALIA

# Key findings

For the first time in five years, household satisfaction with electricity has shown a year-on-year decline, decreasing from 83% to 80%.

While this is still one of the highest levels of satisfaction recorded in the ECSS, a decrease could signal a shift as energy bills and cost of living costs increase. In the past year satisfaction in the cost of electricity has moved from 56% to 53% while value for money of electricity has decreased from 70% to 67%.

The national decrease in satisfaction has been driven by South Australia (80%, down 5% points from last year) and Western Australia (75%, down 5% points) and Victoria (81%, down 4% points from 85%).

Small businesses, in contrast, have not lost any satisfaction and continue to show highest ever levels of satisfaction with electricity (now at 77%, 75% last year) and gas (80%, up 5% points). Small business satisfaction with cost of electricity has increased 6% points from 54% to 60% in June 2022 and perceived value for money has increased to 76% (up 8% points from 68%).

This survey was conducted following the 2022 floods which affected large areas of eastern Australia in NSW and Queensland and have likely contributed to the 36% of Australian households who say they have experienced an electricity outage in the past 6 months.

For those households who did experience an outage, they were less satisfied with the time to restore the service (56%, down 7% points from 63% last year). Satisfaction with communication from the provided during the outage (47%, 48% last year) and the number of outages (52%, 54% last year) are at a comparable level to last year.

As the energy market transitions and adapts to changing demand and usage of electricity, there could be a risk that immediate concerns over service and cost could undermine long-term confidence in the market operators and regulators to deliver this change.

Household confidence that the overall market is working in your long-term interests is now at 44% (46% last year). Confidence has decreased particularly in SE QLD (43%, down 5% points), WA (40%, down 5% points), SA (38%, down 10% points) and Tasmania (36%, down 5% points).

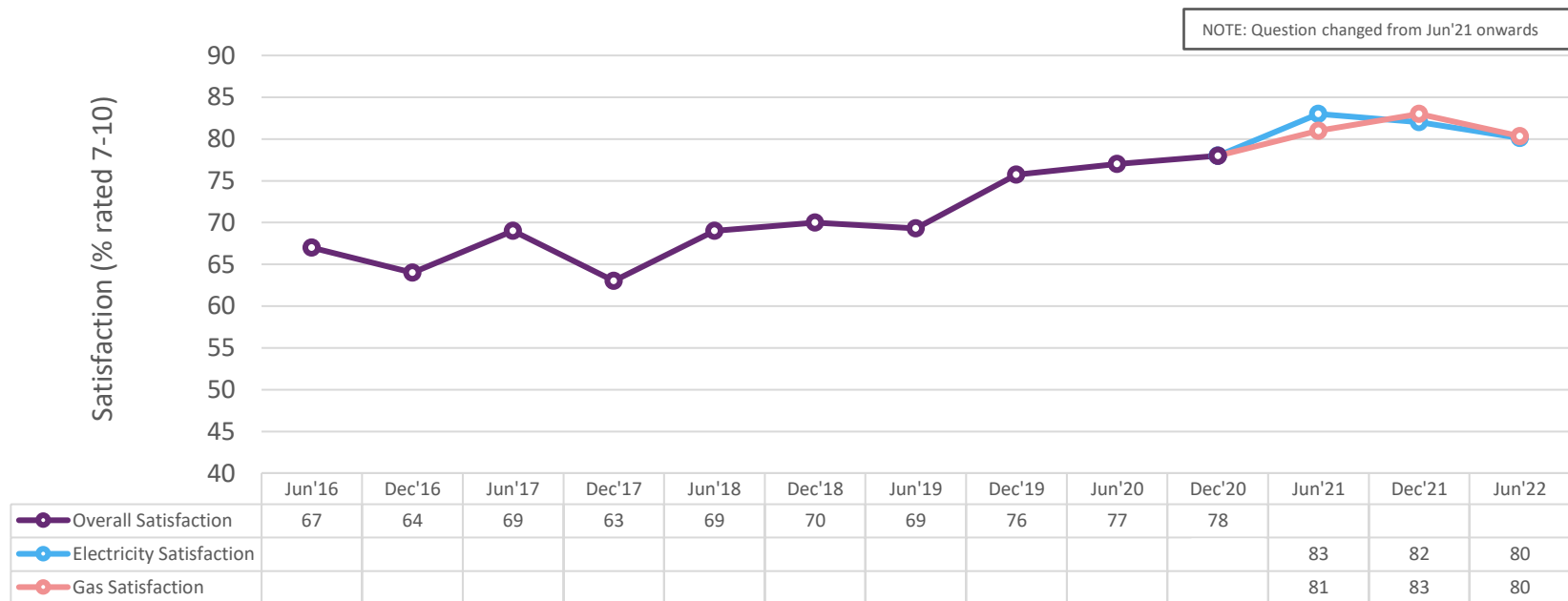
Confidence that households can get a problem with your energy services resolved through their energy company or a third party is now 64% (66% last year). Confidence has decreased in WA (58%, down 6% points), SA (64%, down 5% points) and Tasmania (60%, down 6% points).

# Satisfaction

- Household overall satisfaction with electricity services has decreased from the June 2021 high (now 80% for electricity, down from 83%. Satisfaction for gas is 80% (81% last year).
- Satisfaction with electricity decreased most in SA and WA (down 5% points) and VIC (down 4% points).
- Satisfaction with the cost of electricity is now 53% (down 3% points from last year).
- 85% of households with gas rate positively the reliability of service – the highest of the aspects included.



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

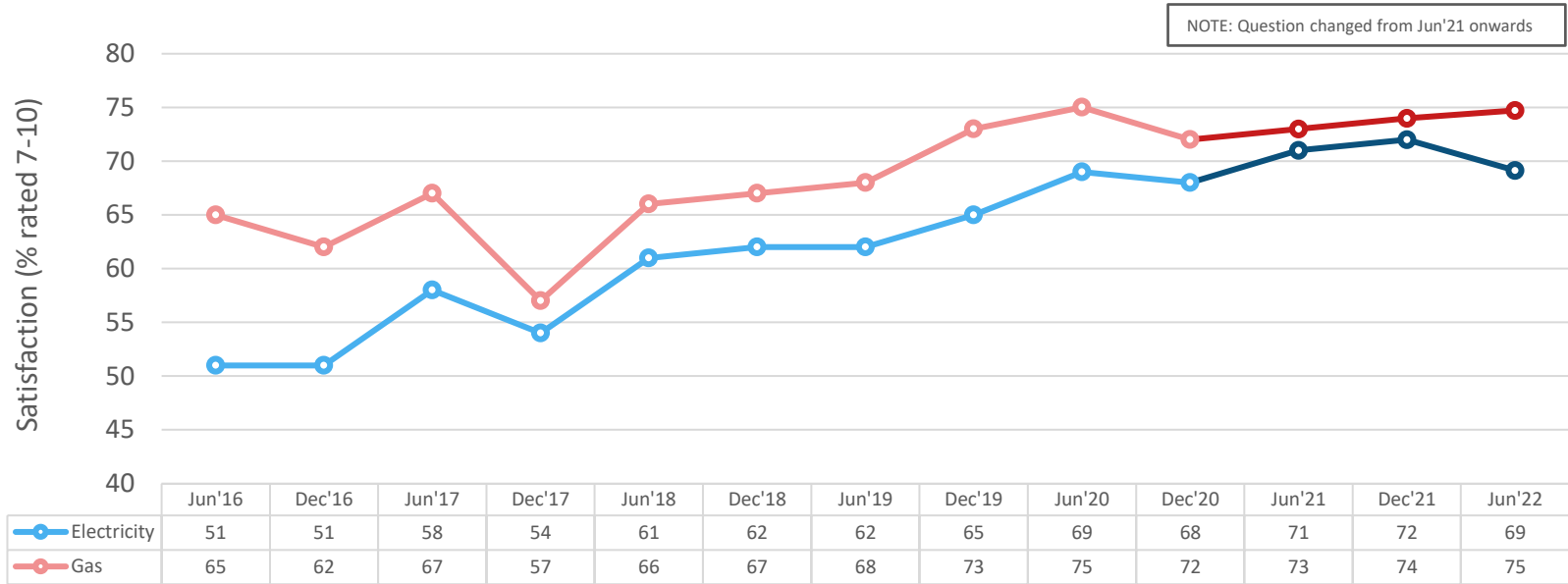


Q (Jun'16-Dec'20): How satisfied are you with the following? **The provision of your electricity and gas services overall over the last 6 months**, Base size: All households (min. n=2,000)

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 households (min. n= 2,120)

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 households with a mains gas supply (min. n= 1,199)

# Satisfaction with retailer measures: Customer service



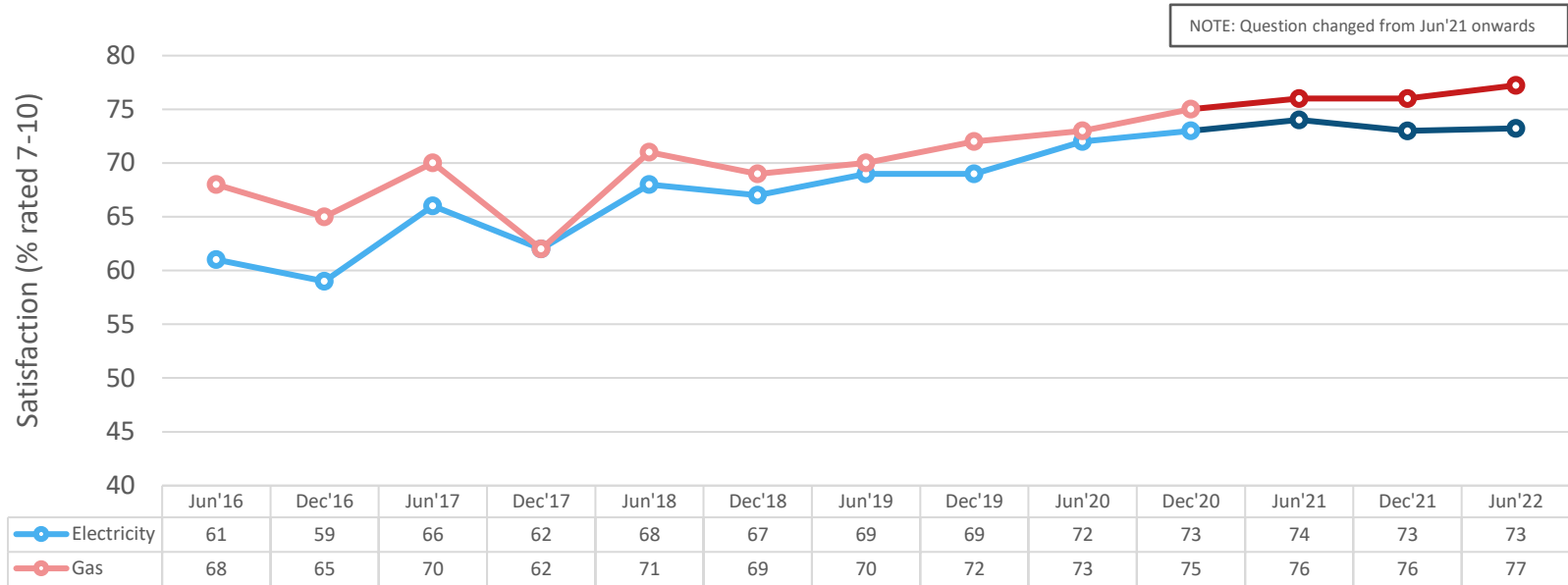
Q (Jun'16-Dec'20): How satisfied are you with the following? **The overall quality of customer service provided by your electricity company in the past 6 months**, Base size: All households (min. n=2,000)

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 households (min. n= 2,120)

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 households with a mains gas supply (min. n=1,000)

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 households with a mains gas supply (min. n= 1,199)

# 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 households (min. n=2,000)

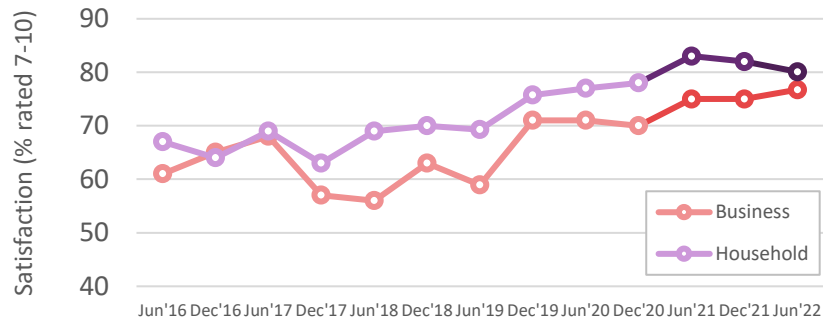
Q (from Jun'21): How satisfied are you with the following aspects of your electricity retailer in the past 6 months? **Billing and usage information is clear and simple to understand**, Base size: All households (min. n= 2,120)

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 households with a mains gas supply (min. n=1,000)

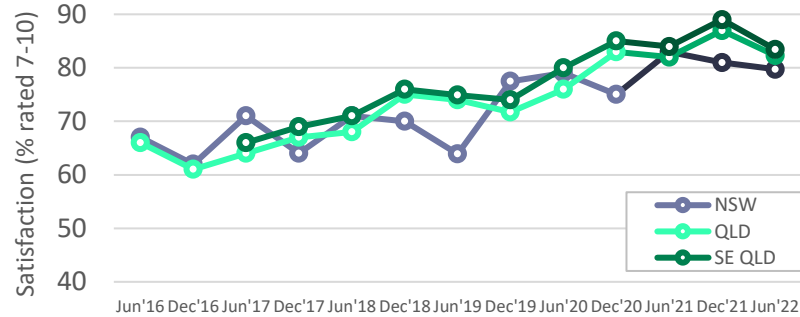
Q (from Jun'21): How satisfied are you with the following aspects of your gas retailer in the past 6 months? **Billing and usage information is clear and simple to understand**, Base size: All households with a mains gas supply (min. n= 1,199)

# Overall satisfaction with electricity services

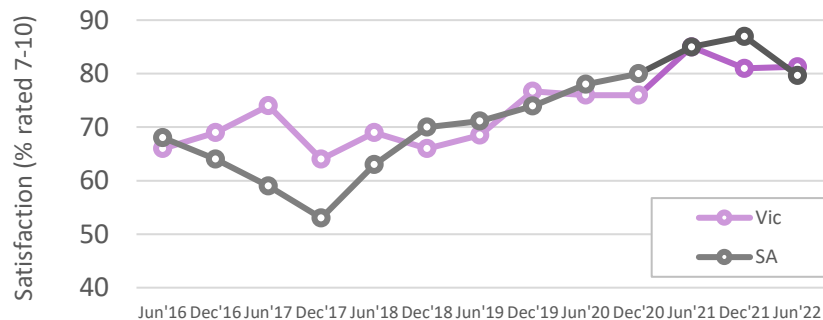
## Overall Satisfaction - Business & Household



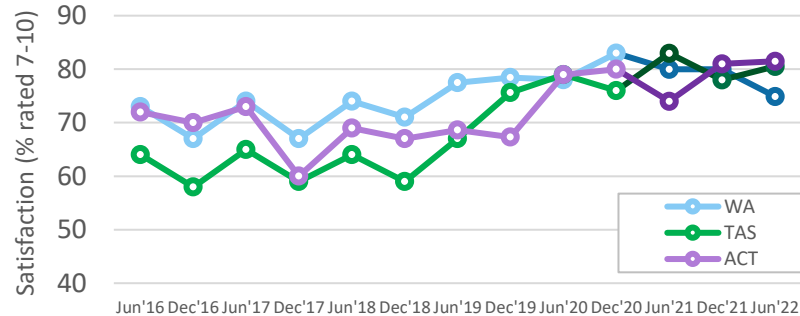
## Overall Satisfaction - NSW, QLD & SE QLD



## Overall Satisfaction - Victoria & SA



## Overall Satisfaction - WA, TAS & ACT

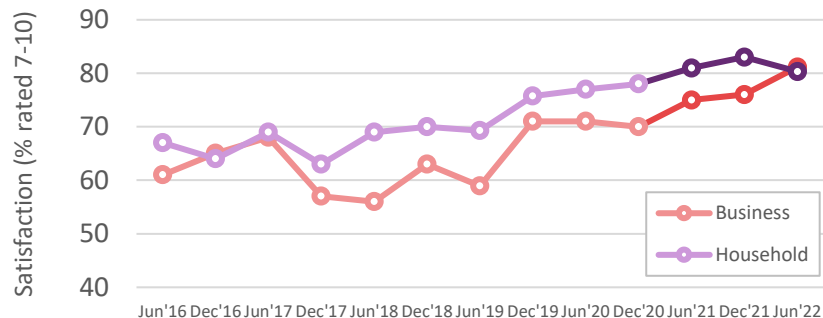


Q (Jun'16-Dec'20): How satisfied are you with the following? **The provision of your electricity and gas services overall over the last 6 months**, Base size: All households (min. n=2,000)

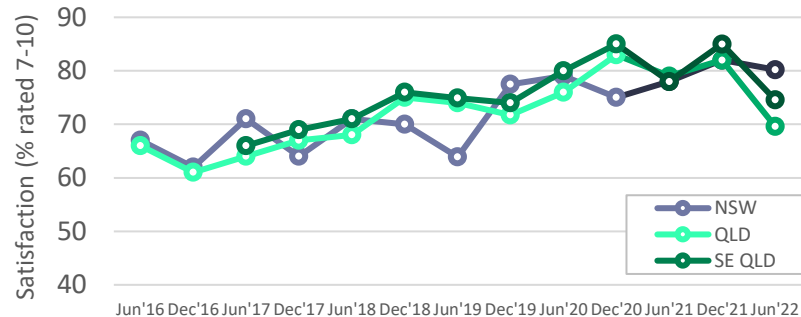
Q (from Jun'21): How satisfied are you with the following elements of your electricity service over the past 6 months? **The provision of your electricity services**, Base size: All households (min. n= 2,120)

# Overall satisfaction with gas services

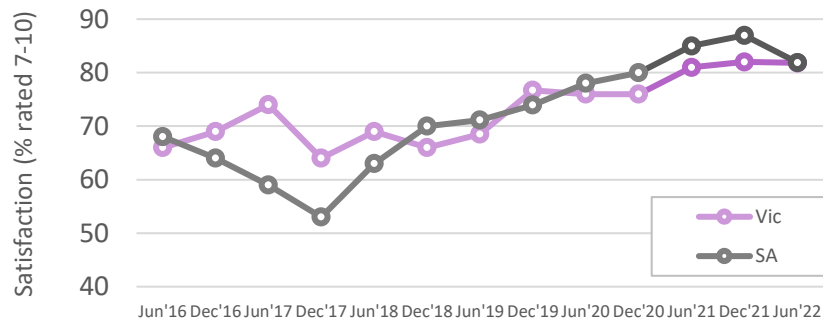
## Overall Satisfaction - Business & Household



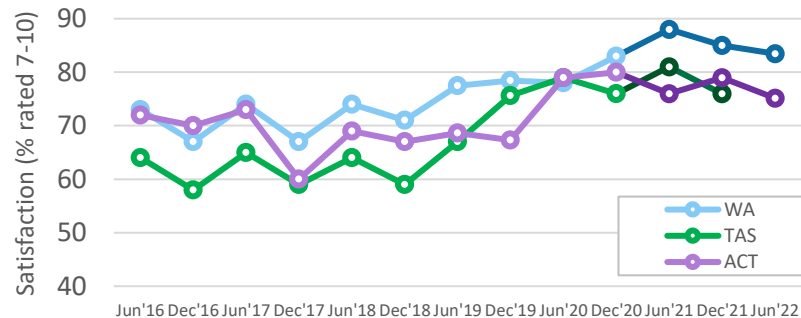
## Overall Satisfaction - NSW, QLD & SE QLD



## Overall Satisfaction - Victoria & SA



## Overall Satisfaction - WA, TAS\* & ACT



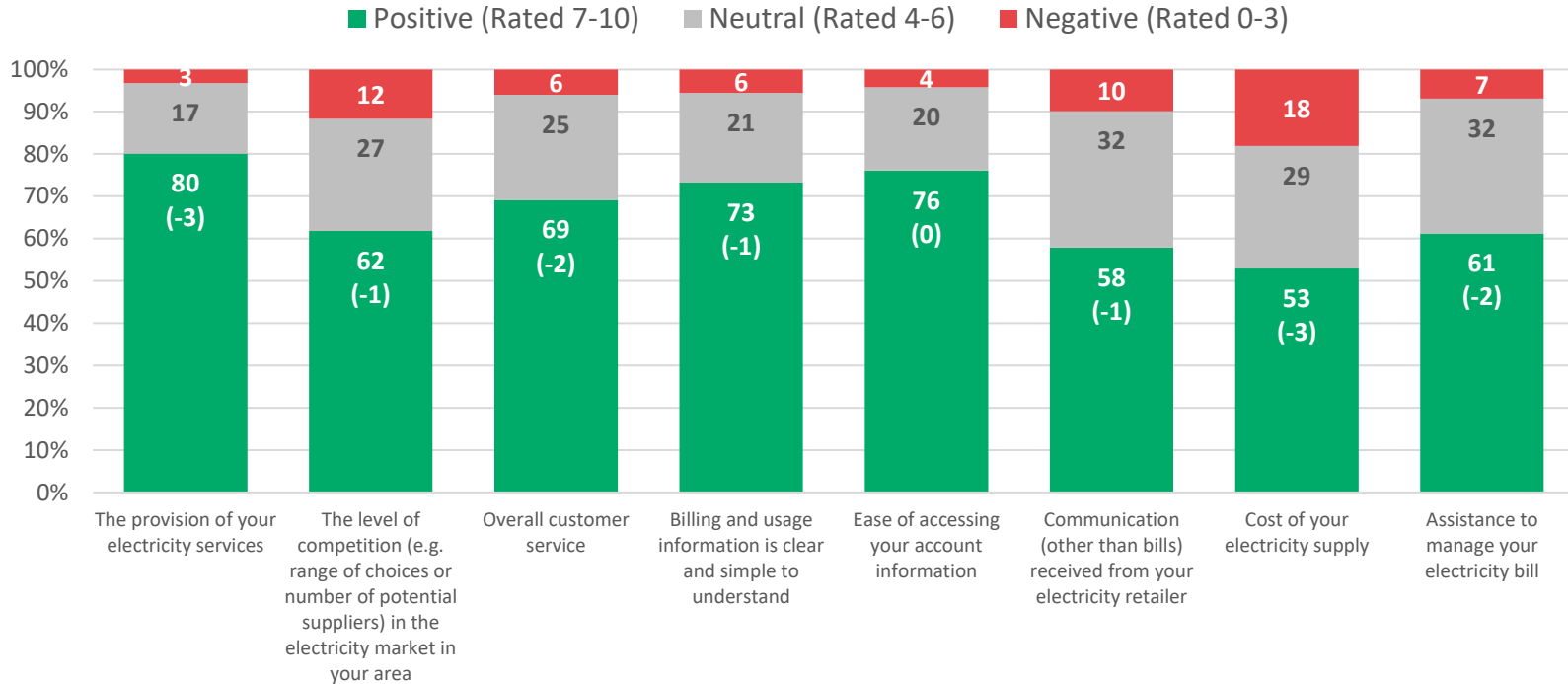
Q (Jun'16-Dec'20): How satisfied are you with the following? **The provision of your electricity and gas services overall over the last 6 months**, Base size: All households (min. n=2,000)

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 households with a mains gas supply (min. n= 1,199)

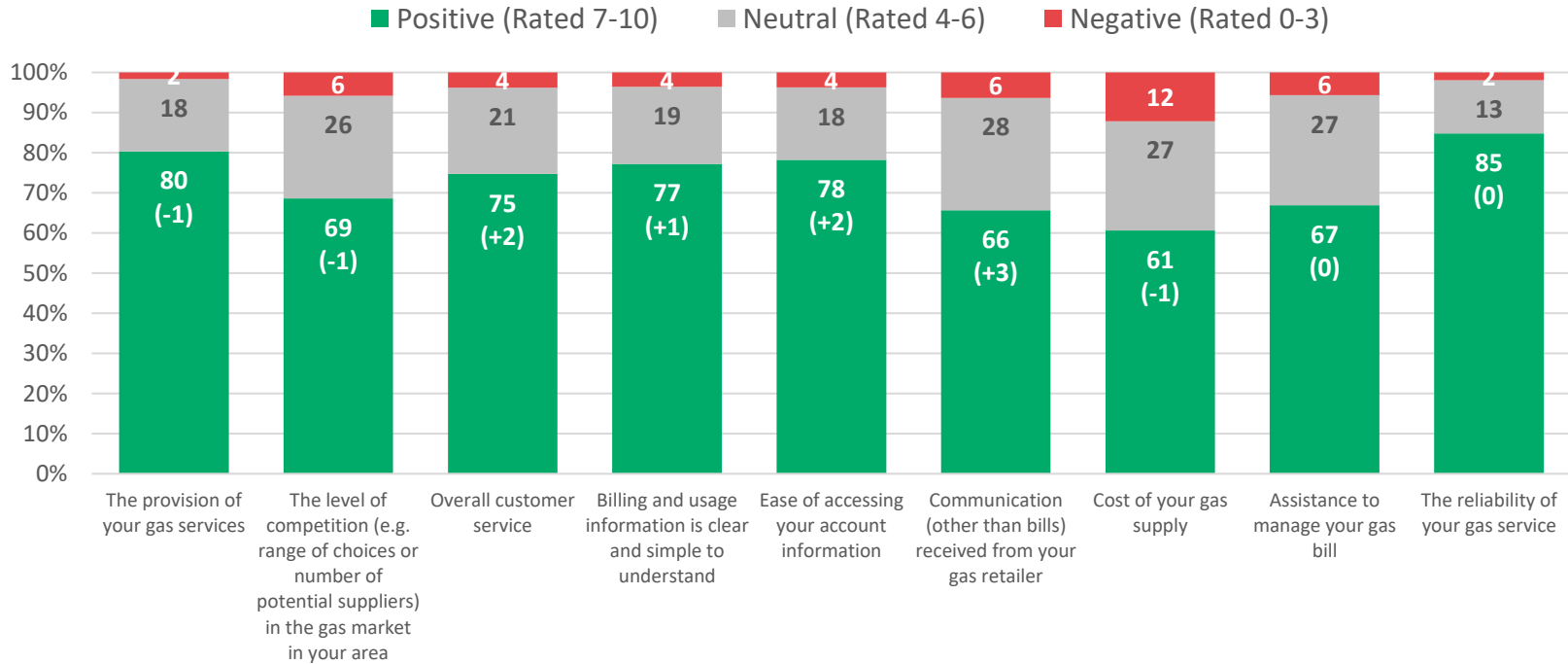
\* Tasmania sample size too small to show results in Jun'22



# Satisfaction with retailer measures: Electricity



# Satisfaction with retailer measures: Gas

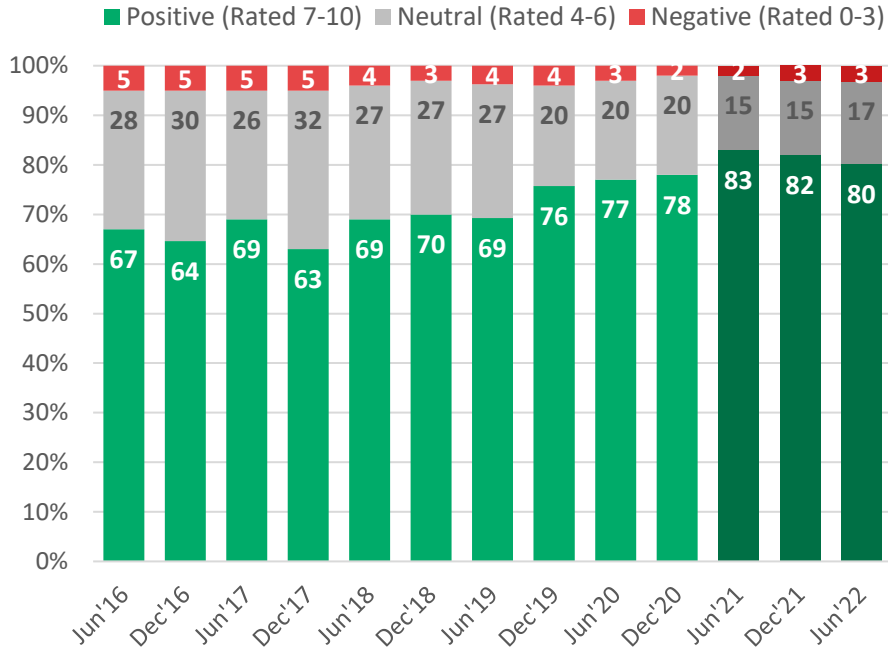


Q (Jun'16-Dec'20): How satisfied are you with the following? Base size: All households with a mains gas supply (min. n=1,000)

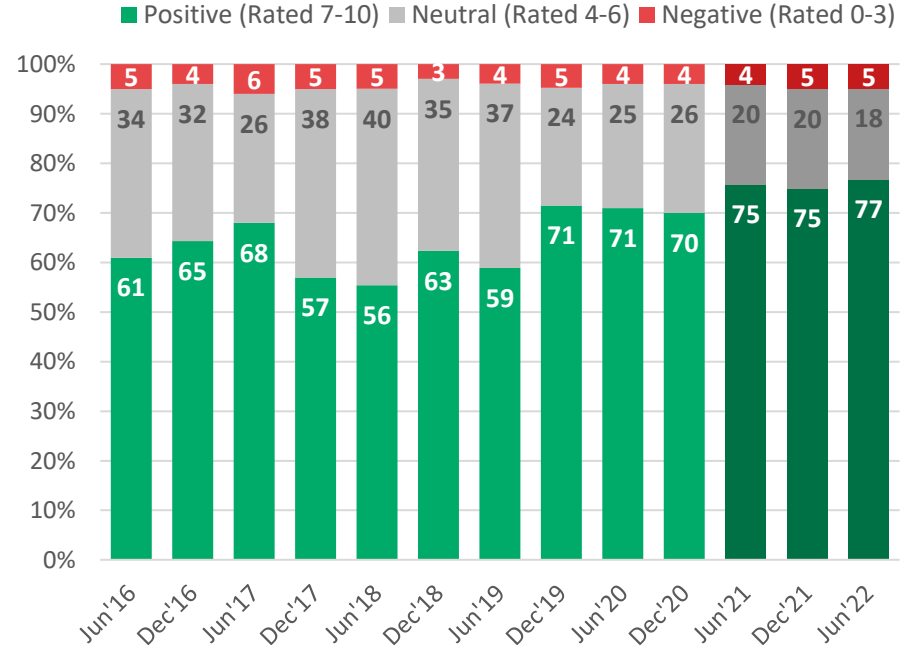
Q (from Jun'21): How satisfied are you with the following elements of your gas service over the past 6 months? Base size: All households with a mains gas supply (min. n=1,199)

# Overall satisfaction with electricity services (Business/Household)

## Overall Satisfaction - Household



## Overall Satisfaction - Business



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 households (min. n=2,000)

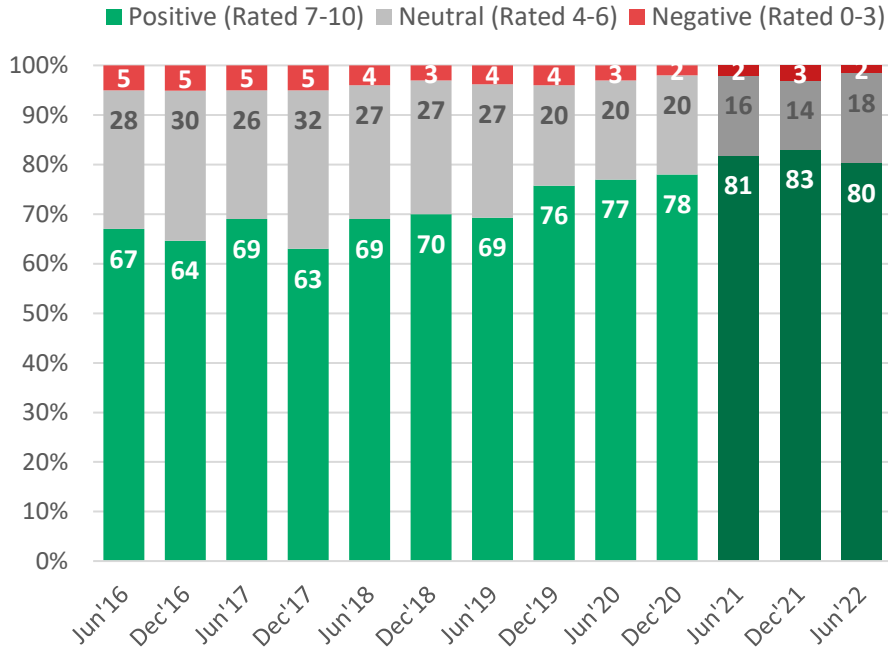
Q (from Jun'21): How satisfied are you with the following elements of your electricity service over the past 6 months? **The provision of your electricity services**, Base size: All households (min. n= 2,120)

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)

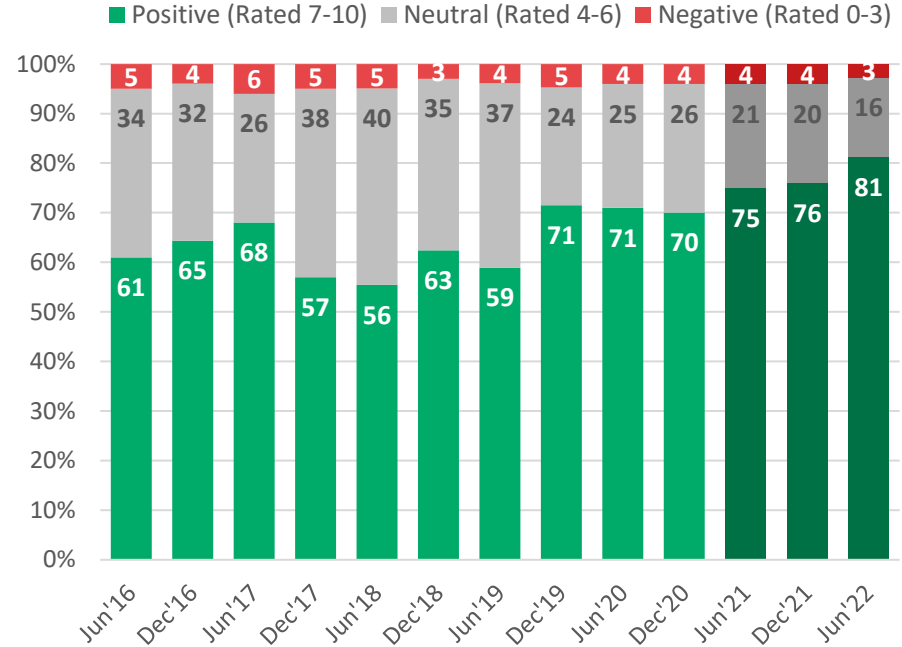
Q (from Jun'21): How satisfied are you with the following elements of your electricity service over the past 6 months? **The provision of your electricity services**, Base size: All businesses (min. n=500)

# Overall satisfaction with gas services (Business/Household)

## Overall Satisfaction - Household



## Overall Satisfaction - Business



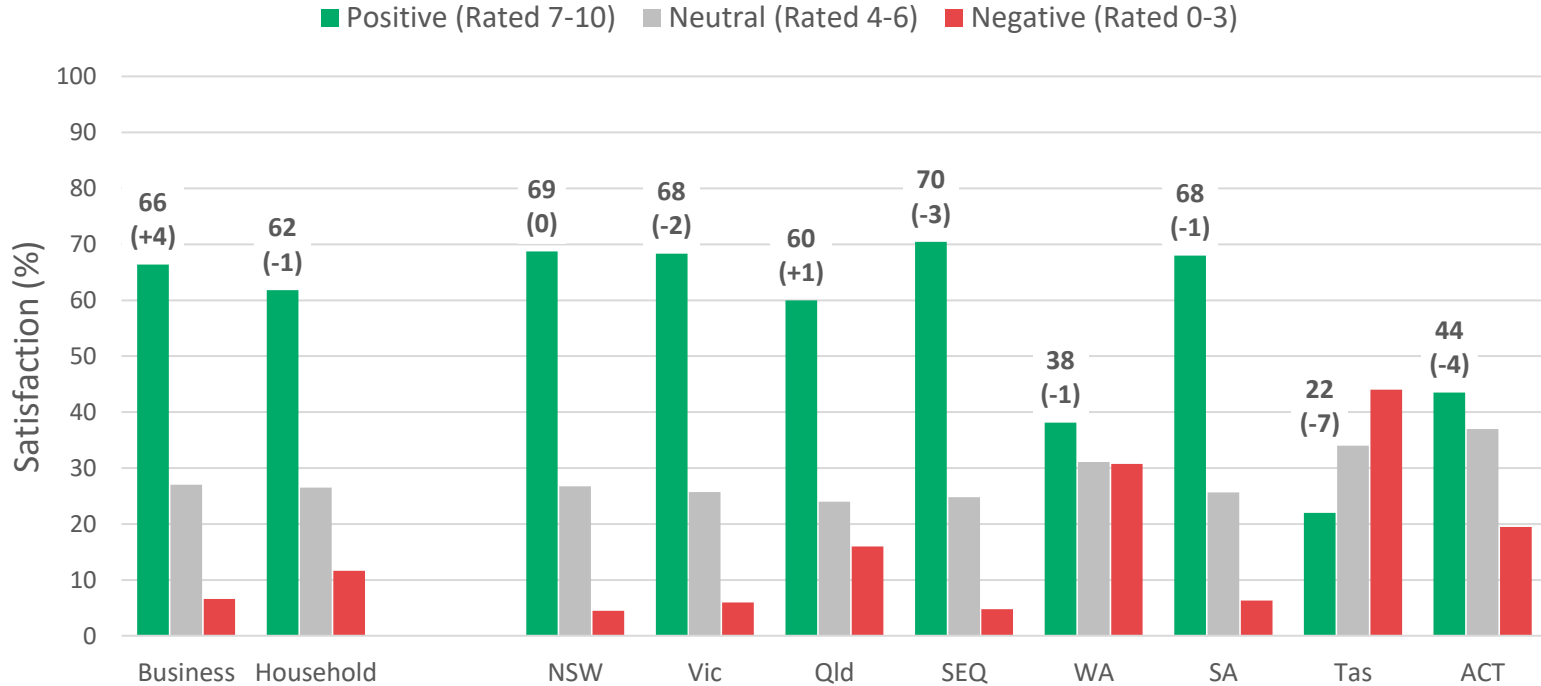
Q (Jun'16-Dec'20): How satisfied are you with the following? **The provision of your electricity and gas services overall over the last 6 months**, Base size: All households (min. n=2,000)

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 households with a mains gas supply (min. n= 1,199)

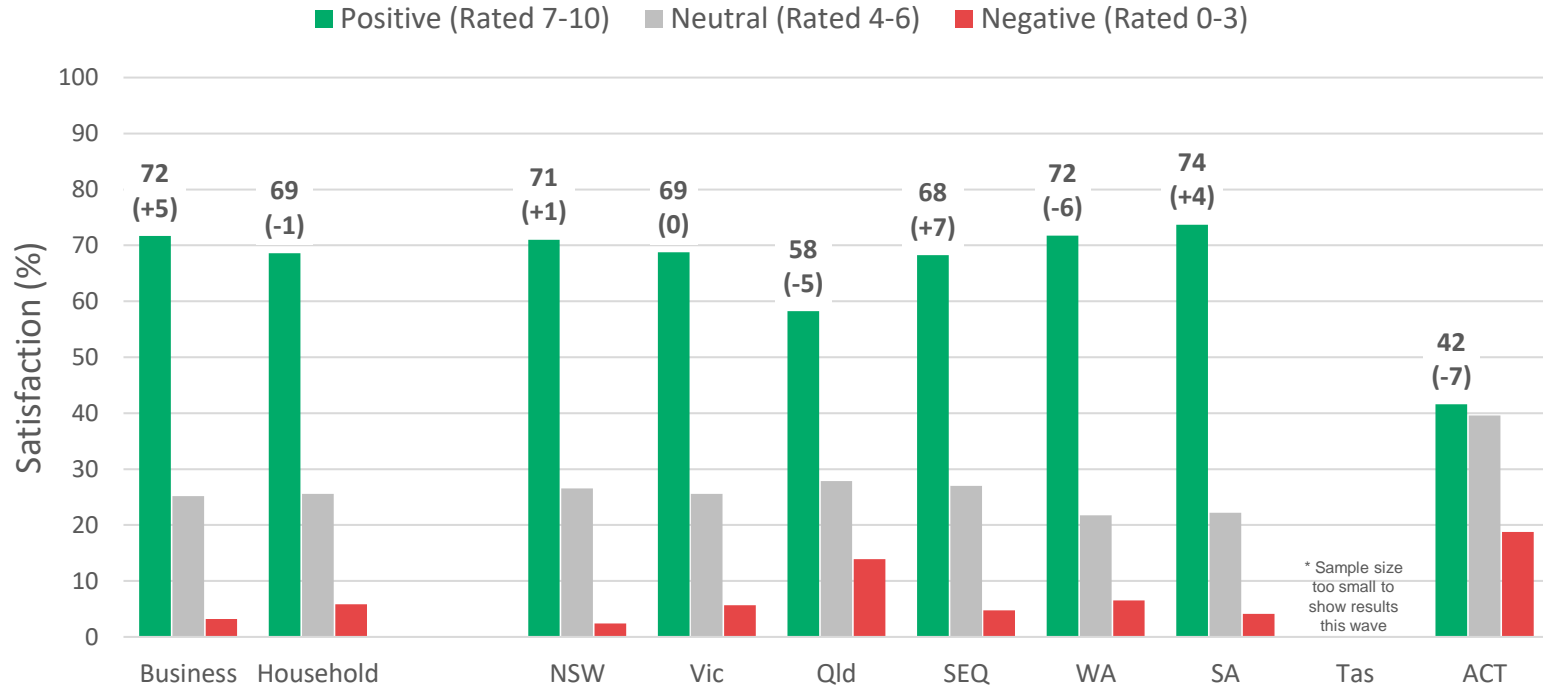
Q (Jun'16-Dec'20): How satisfied are you with the following? **The provision of your electricity and gas services overall over the last 6 months**, Base size: All businesses (min. n=280)

Q (from Jun'21): How satisfied are you with the following elements of your 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 level of competition: Electricity



# Satisfaction with level of competition: Gas

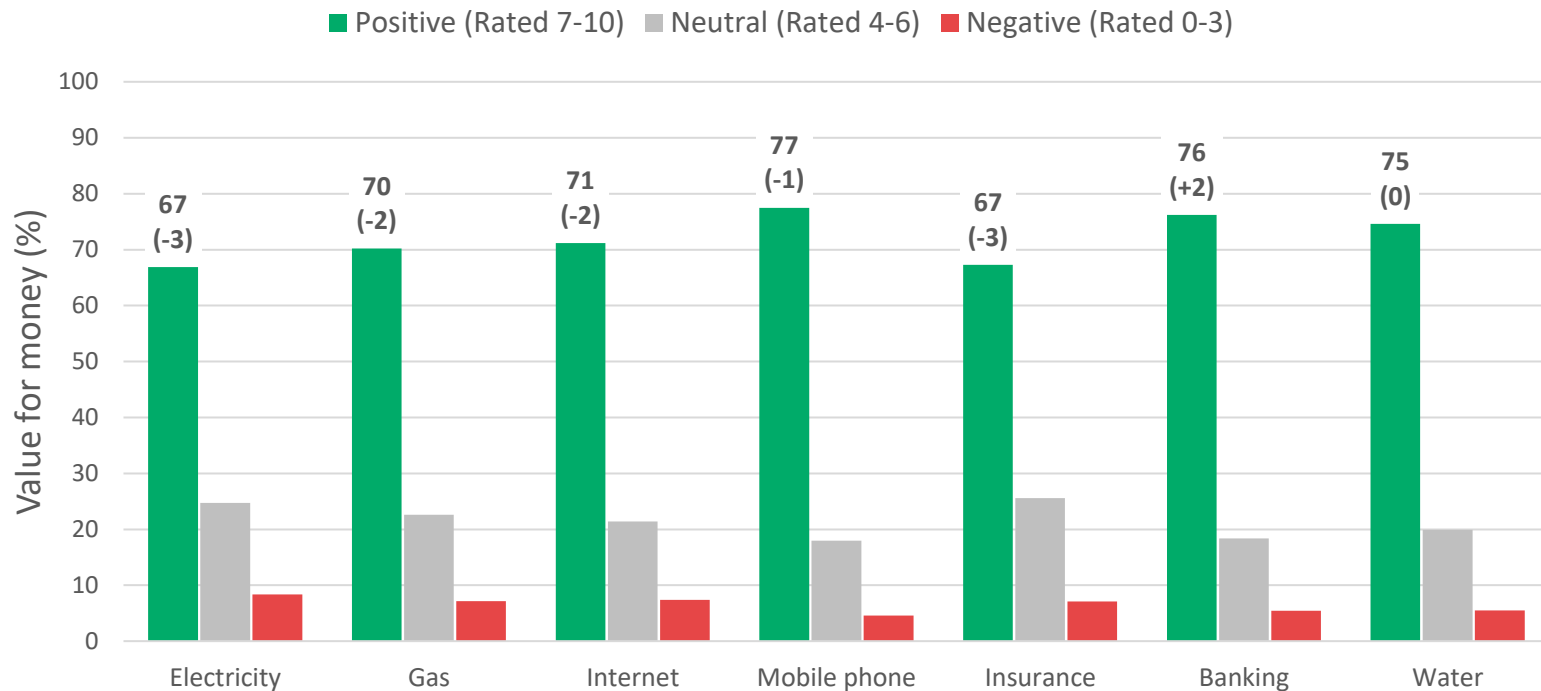


# Value for money & Outages

- Electricity value for money is now at 67% (positive rating 7-10), down from 70% at the same time last year. Value for money of gas services is at 70% (down from 72% last year).
- 36% of households have experienced an electricity outage in the last 6 months. This is consistent with June 2021 (33%).
- For households who experienced an electrical outage, 56% were satisfied with the time it took to restore supply, down 7% points from last year.



# Value for money of all services (Household)



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 households (min n=2,120)

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?

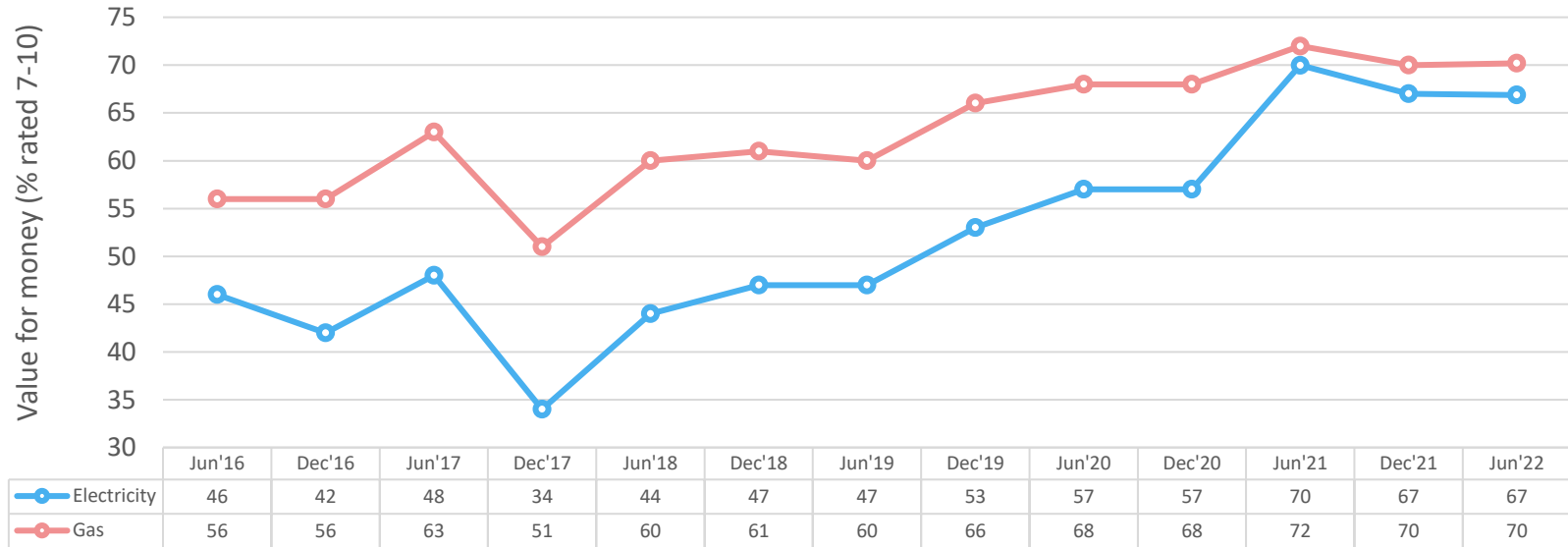
Base size: All households with a mains gas supply (min n=1,199)

Q: How would you rate the overall value for money by your service provider in the following areas, in the past 6 months?

Base size: All households (min n=1,950)



# Value for money



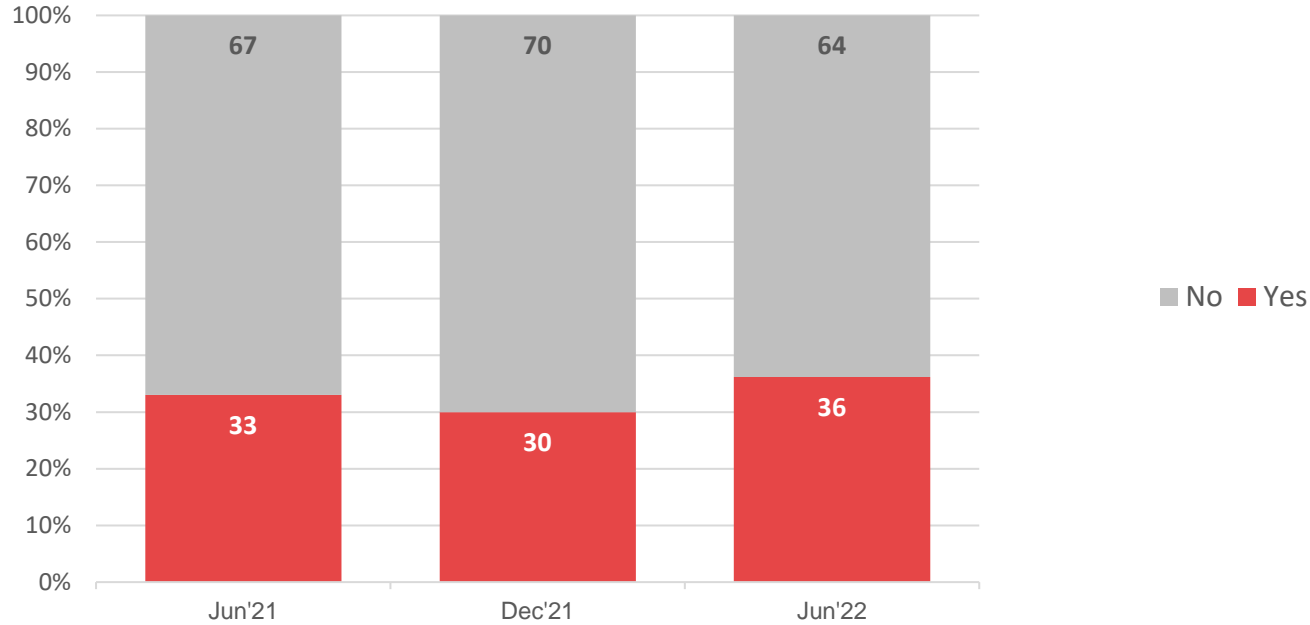
Q: How would you rate the overall value for money of the products and services provided by your electricity company in the past 6 months?

Base size: All households (min. n=2,000)

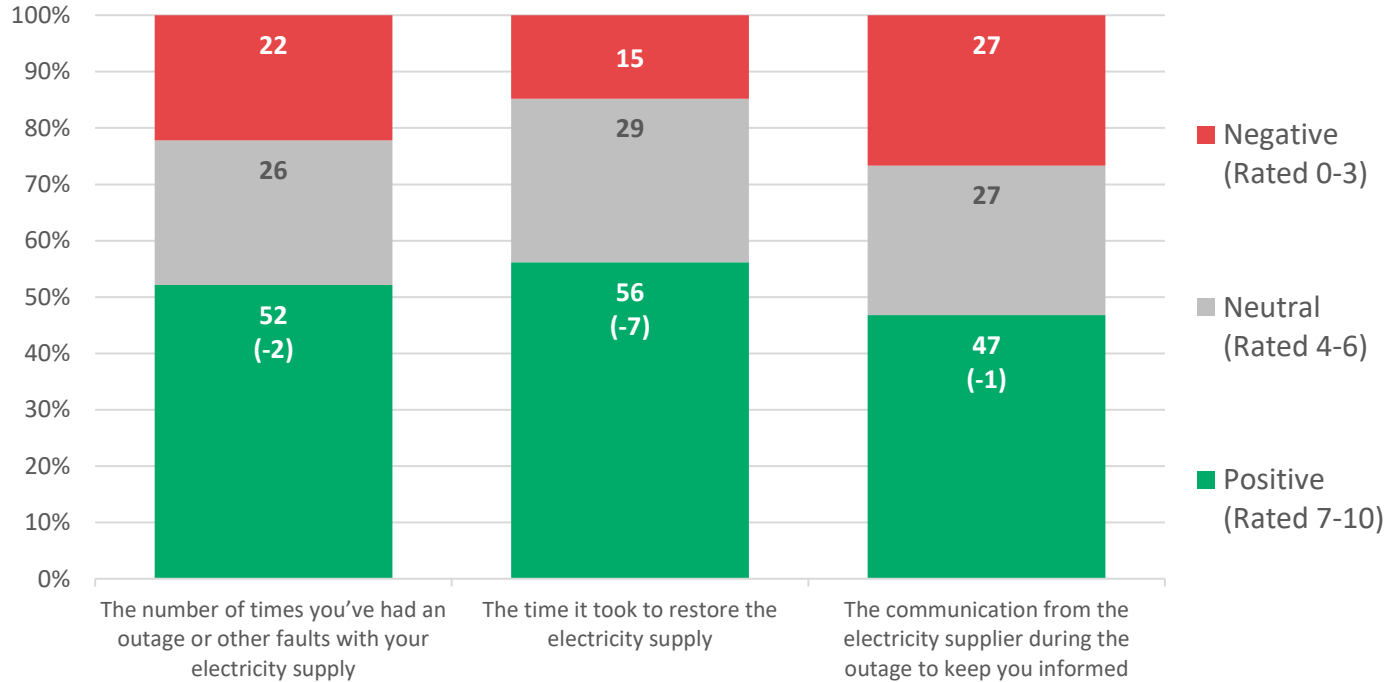
Q: How would you rate the overall value for money of the products and services provided by your gas retailer in the past 6 months?

Base size: All households with a mains gas supply (min. n=1,000)

# 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?

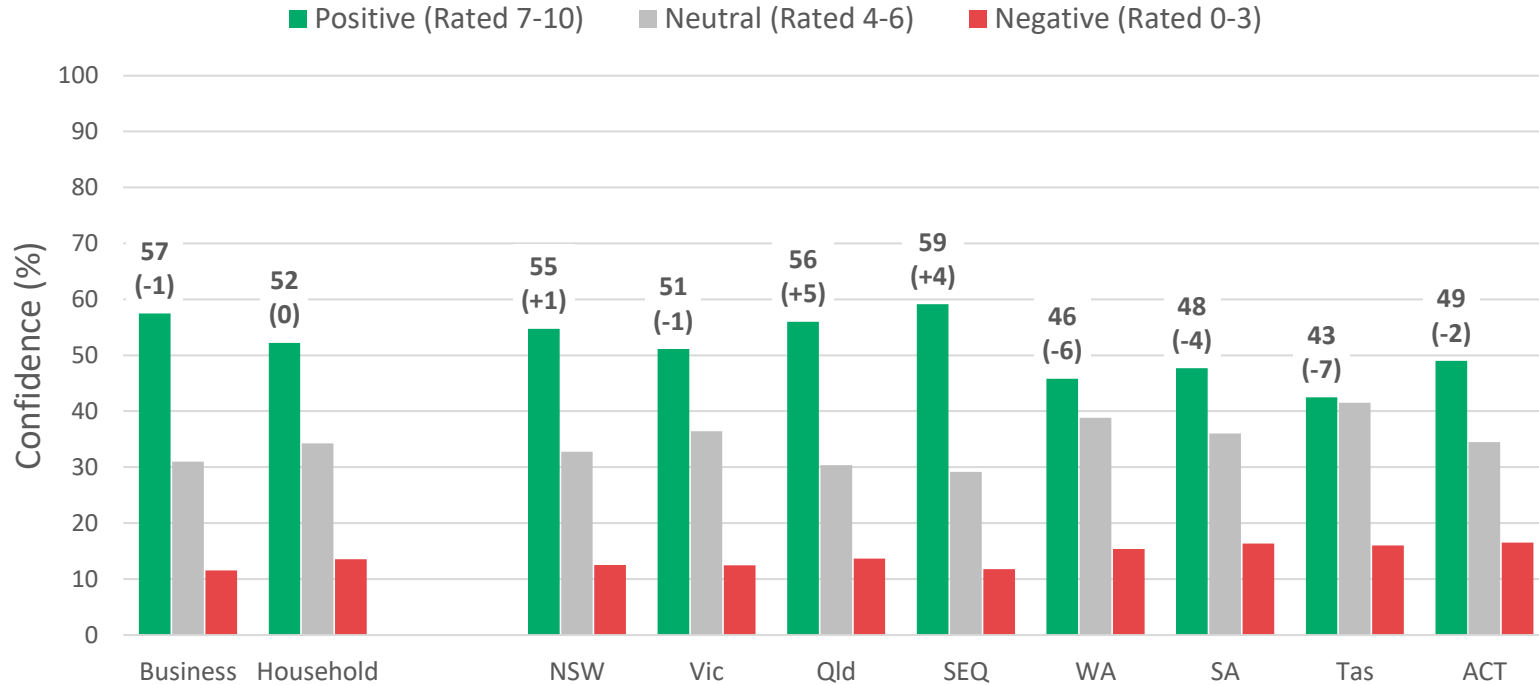
Base size: All households who have experienced an outage in the last 6 months (min n=750)

# Household Confidence

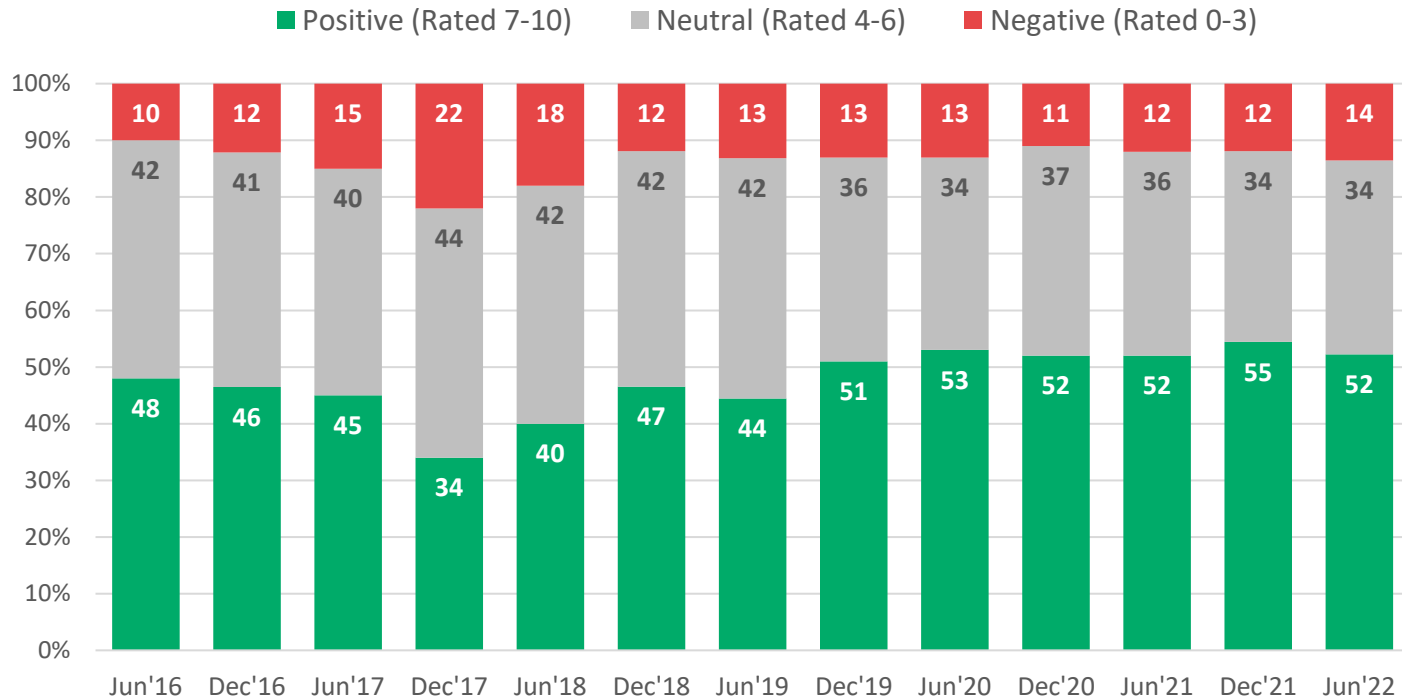
- Nationally, 53% of households are confident that the energy market will provide a more reliable supply in the future (same as June 2021), but confidence has fallen in WA (44%, down 11% points), Tasmania (45%, down 9% points) and ACT (44%, down 9% points).
- 64% of households say they are confident in their ability to make choices about energy products and services, such as which plan or supplier to choose, but just 44% 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 (34%).



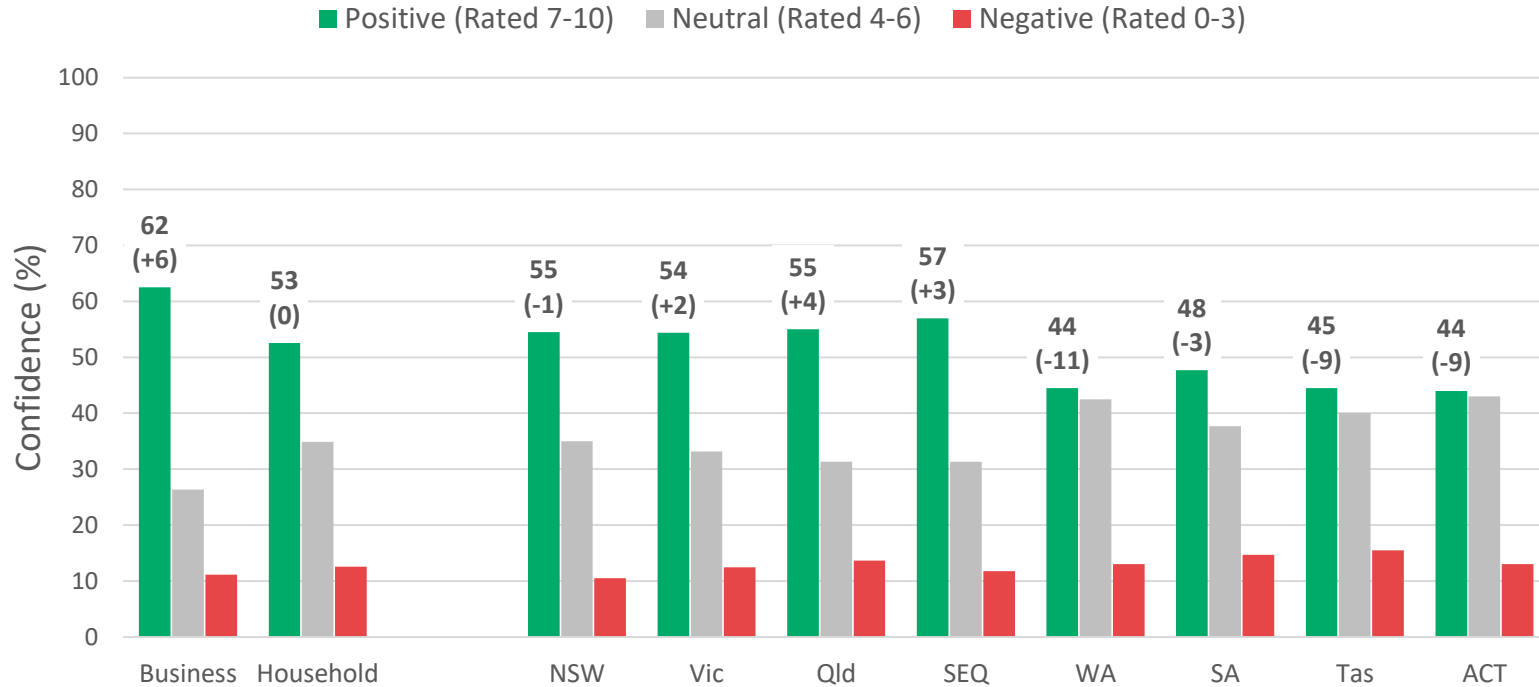
# Confidence in advances in technology



# Confidence in advances in technology



# Confidence in future reliability

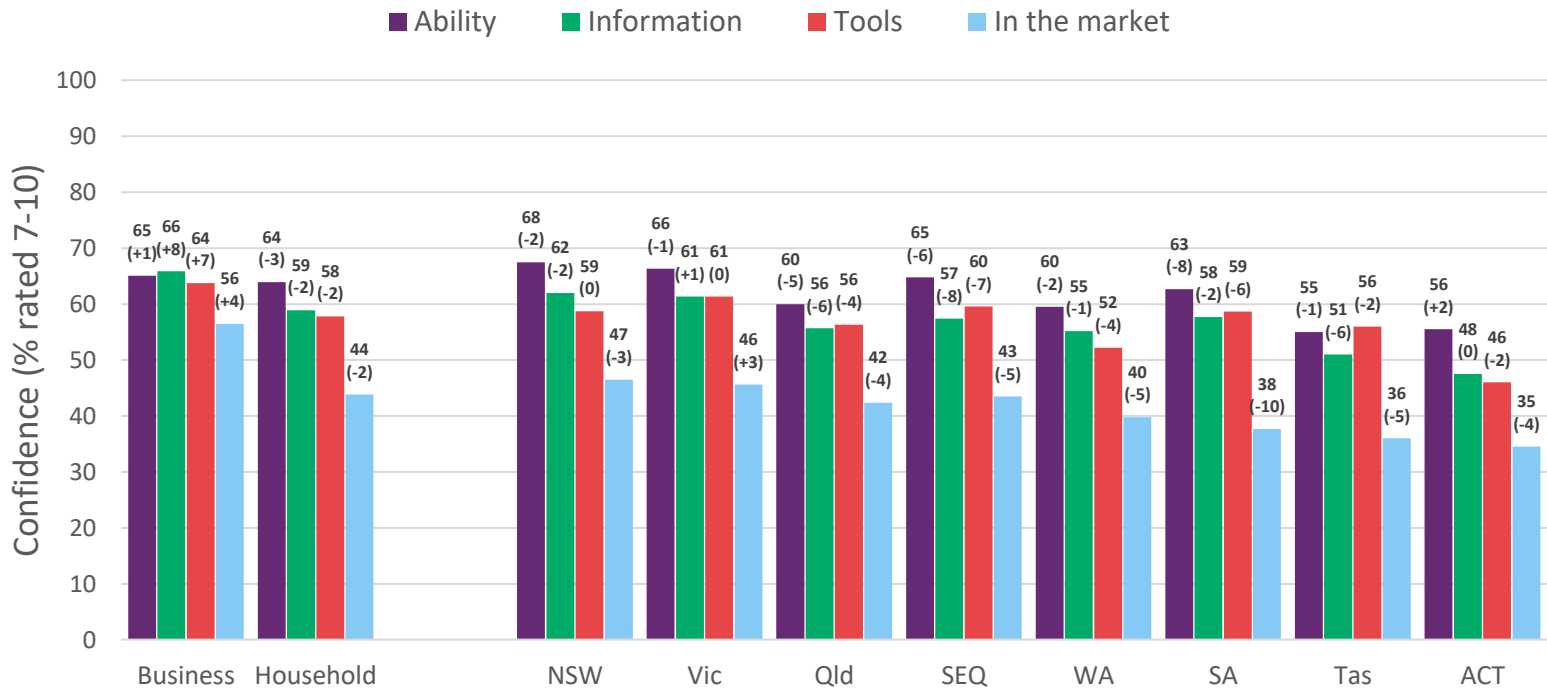


Q: Thinking about the overall market outcomes, how confident are you that the energy market will provide better outcomes for you in 5 years, in terms of...? **Provide a more reliable supply**

Base size: All households (min n=2,120)

Base size: All businesses (min n=500)

# Confidence in ability, information and tools



Q: How confident do you feel in the following...?

**Your ability to make choices about energy products and services, such as which plan or supplier to choose,**

**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**

**That you have the tools and assistance you need to manage your energy use and costs, by which we mean electricity meters, smart phone devices, apps or other tools**

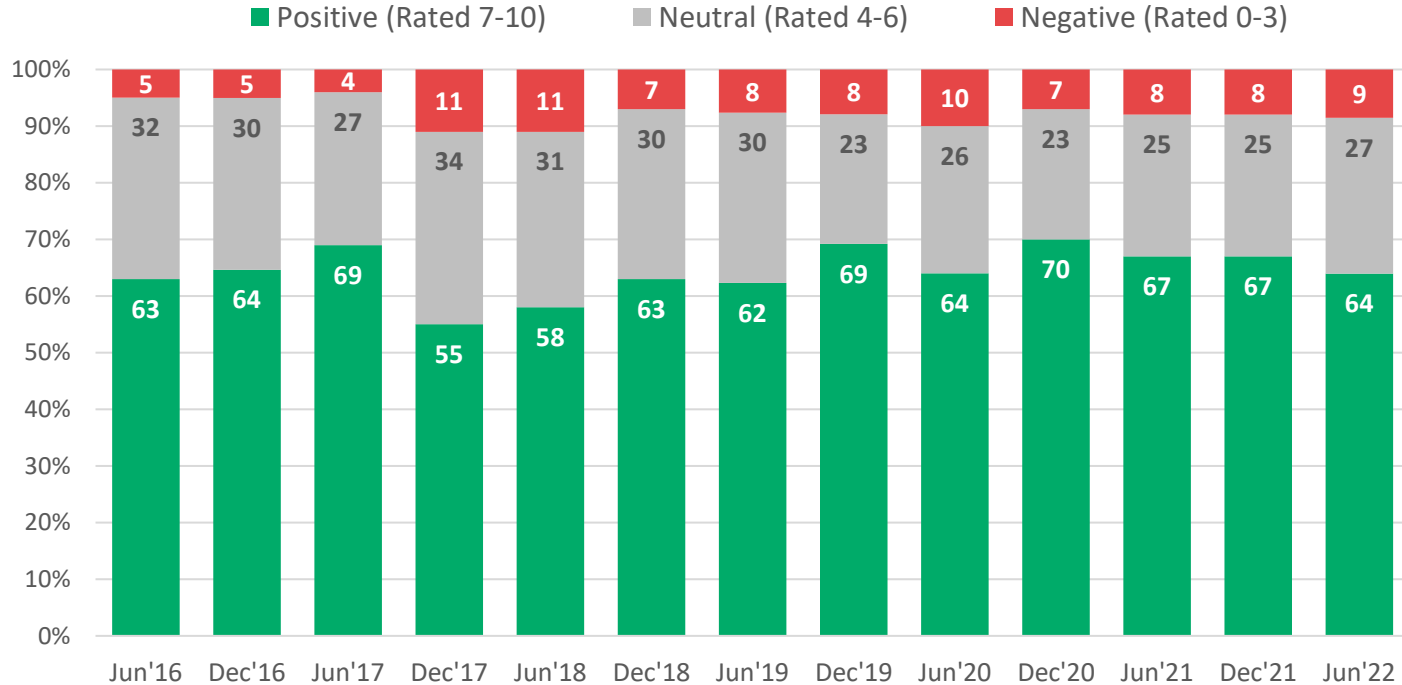
Q: How confident are you that the overall market is working in your long-term interests? By 'the market' we mean, the energy industry and energy regulators

Base size: All households (min n=2,120)

Base size: All businesses (min n=500)



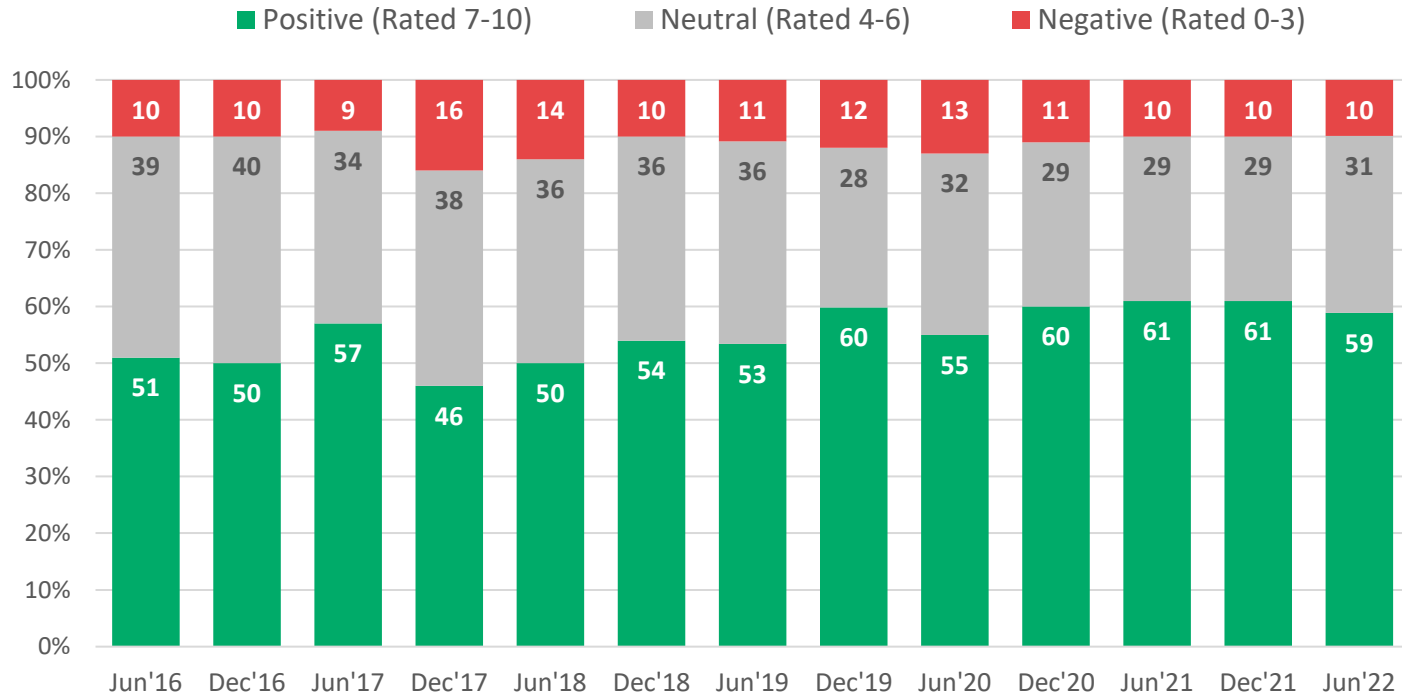
# Confidence in ability to make choices



Q: How confident do you feel in the following...? **Your ability to make choices about energy products and services, such as which plan or supplier to choose**

Base size: All households (min. n= 2,000)

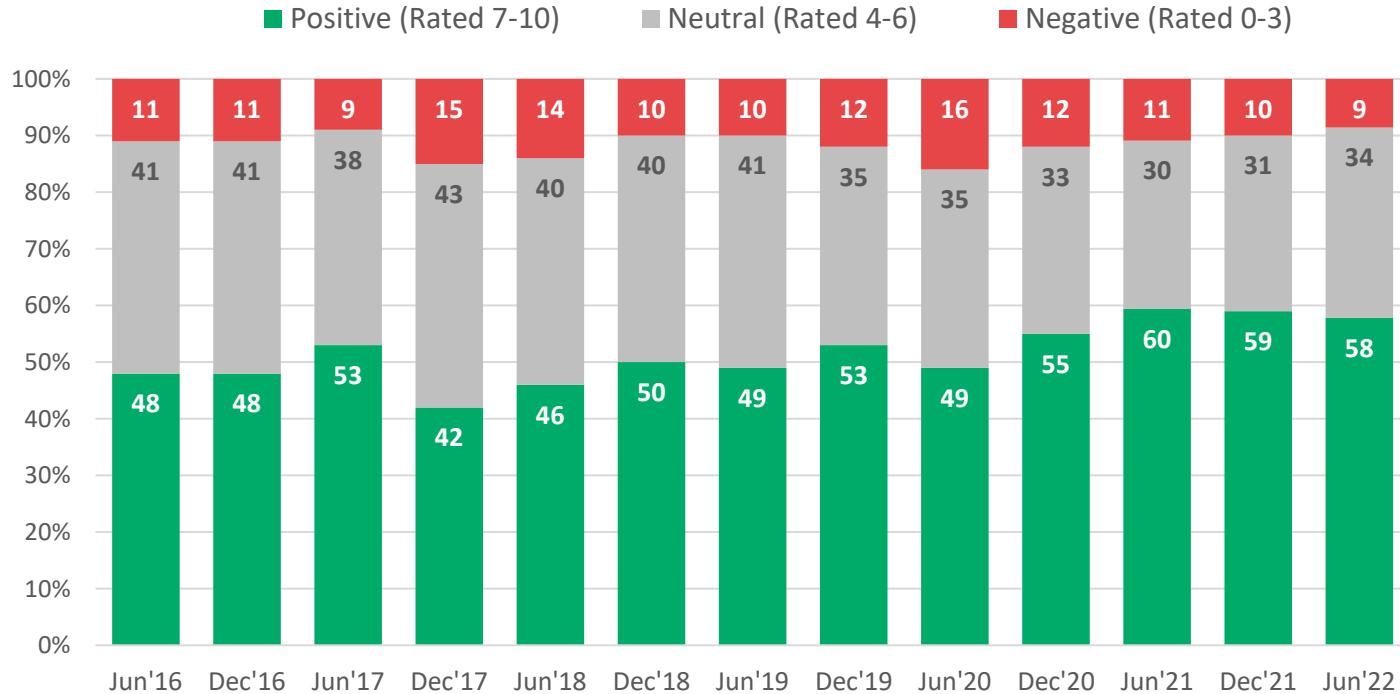
# Confidence in availability of enough easily understood information



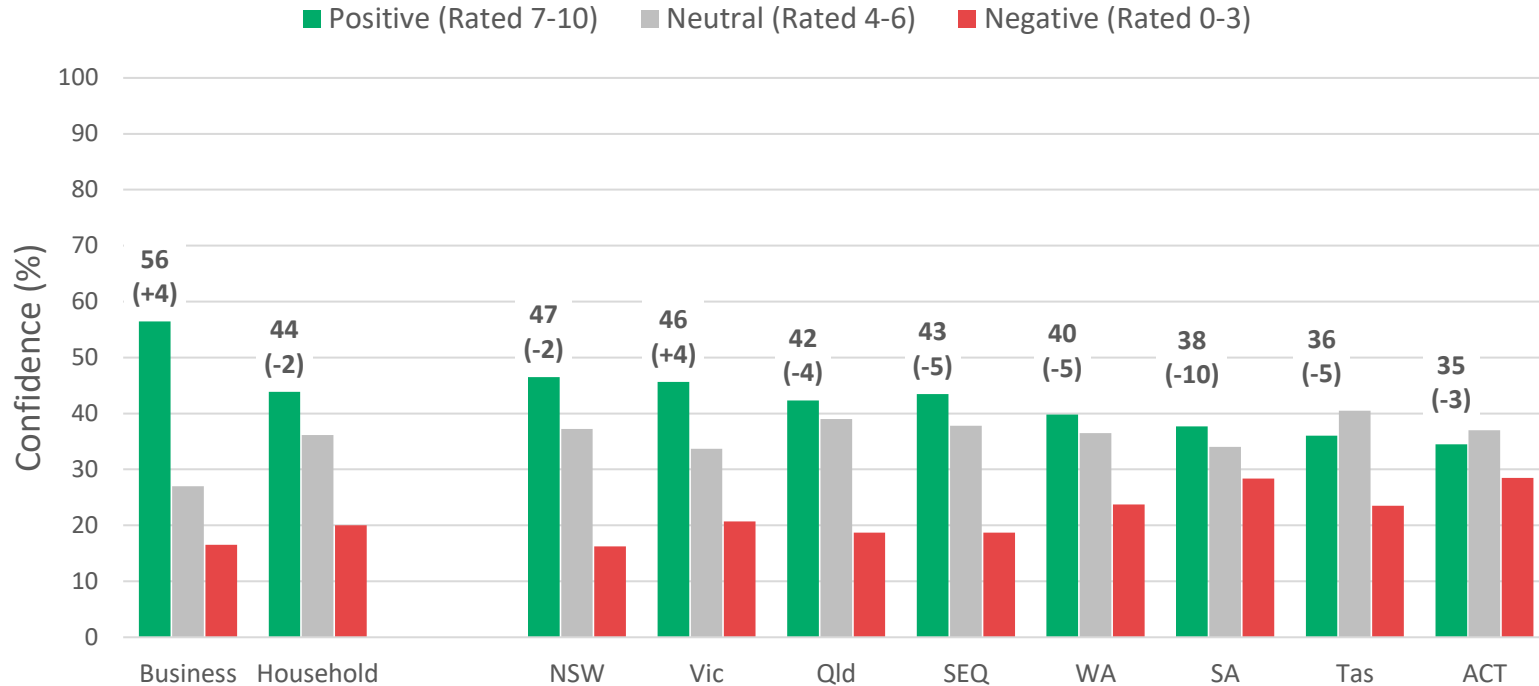
Q: How confident do you feel in the following...? **That there is enough easily understood information available to you to make decisions about energy products and services, by which we mean information available on the internet, through energy comparison websites or elsewhere**

Base size: All households (min. n= 2,000)

# Confidence in availability of tools



# Confidence in the market

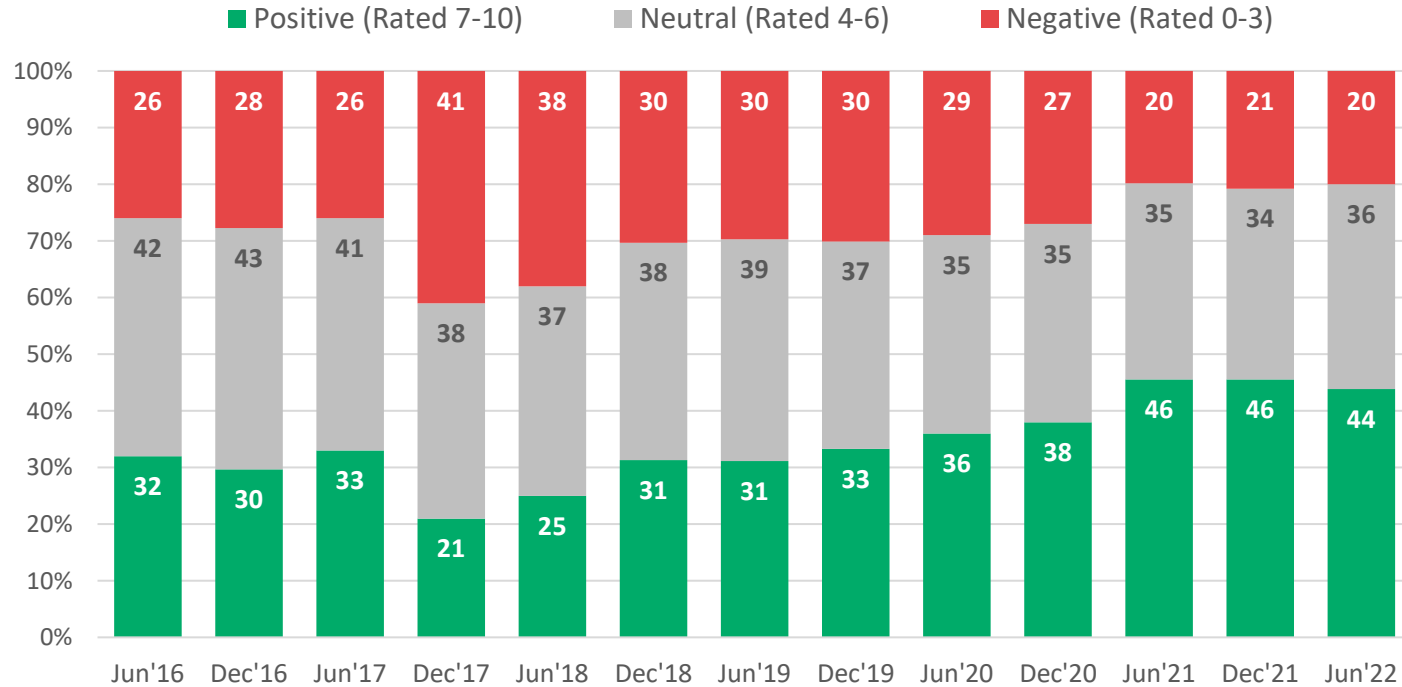


Q: How confident are you that the overall market is working in your long-term interests? By 'the market' we mean, the energy industry and energy regulators.

Base size: All households (min n=2,120)

Base size: All businesses (min n=500)

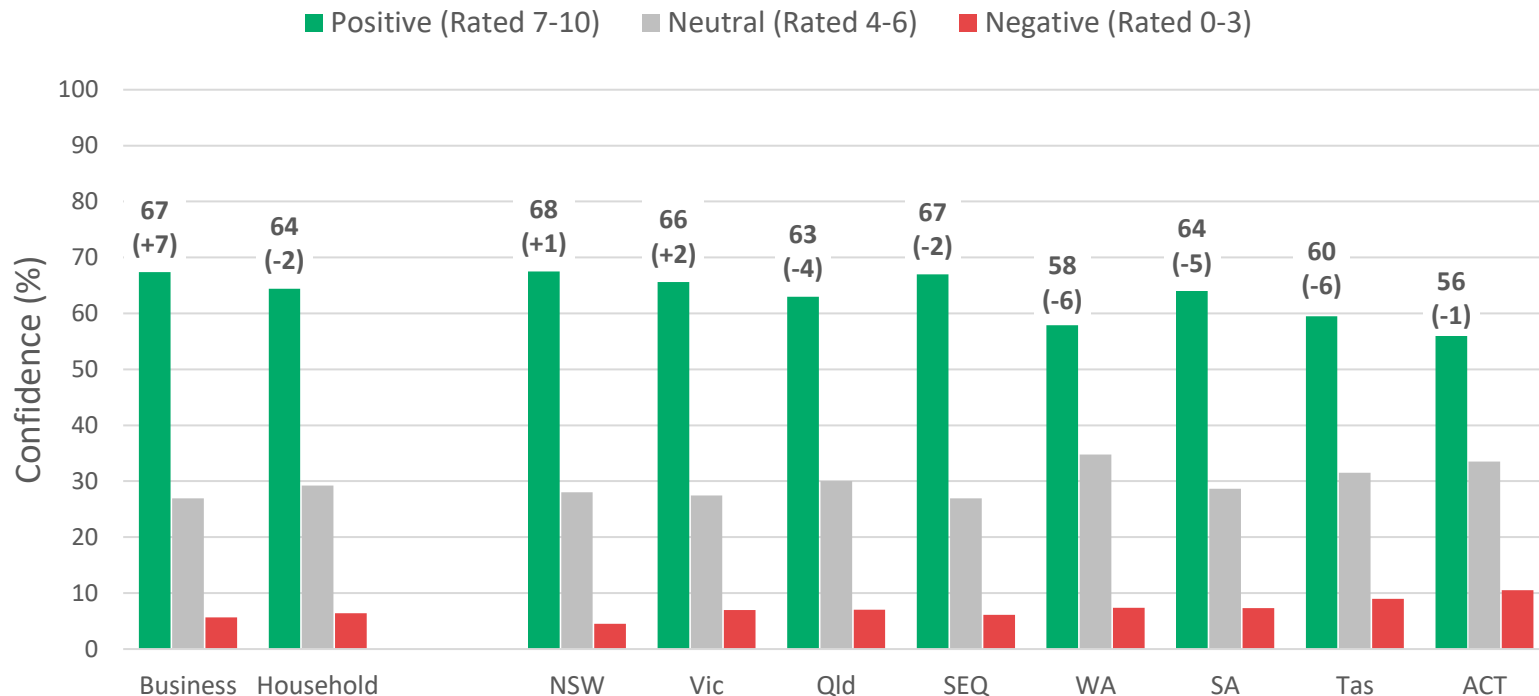
# Confidence in the market



Q: How confident are you that the overall market is working in your long-term interests? By 'the market' we mean, the energy industry and energy regulators.

Base size: All households (min. n=2,000)

# Confidence in ability to have problems resolved

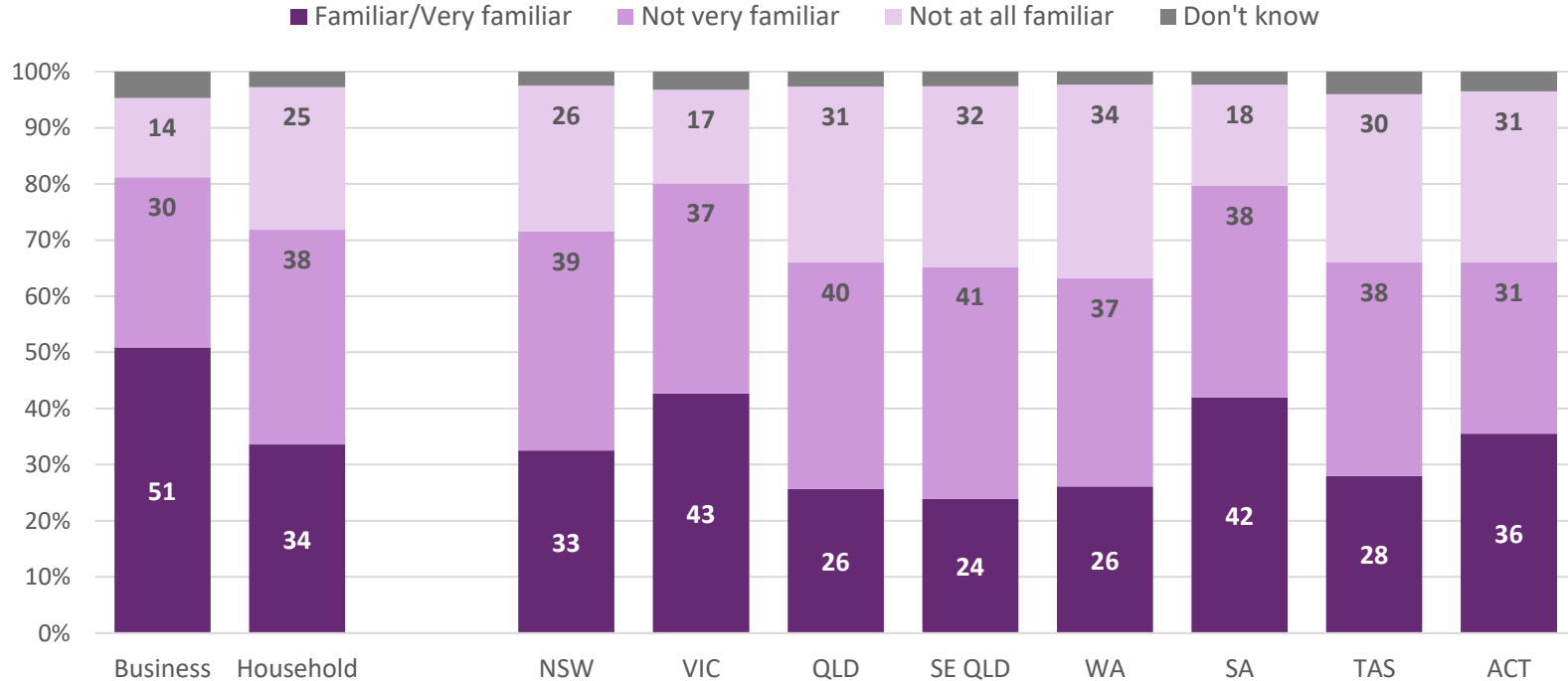


Q: How confident do you feel in the following...? **Your ability to get a problem with your energy services resolved through your energy company or a third party**

Base size: All households (min n=2,120)

Base size: All businesses (min n=500)

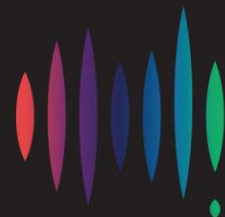
# Familiarity with Ombudsman services



Q: How familiar are you with an organisation called the Energy Ombudsman, which assists consumers with complaints about energy?

Base size: All households (min n=2,120)

Base size: All businesses (min n=500)



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