

ENERGY CONSUMER SENTIMENT SURVEY

Household Topline Results
December 2022



Key findings

While the overall provision of service for electricity is stable from this time last year, there are significant decreases in the underlying satisfaction measures - particularly cost, as consumers acknowledge increased bills and higher cost of living pressures.

Nationally, 82% of households are satisfied with their electricity services (rated 7-10 out of 10) – the same as Dec'21. Satisfaction has declined in SA (81%, down from 87%) while small business satisfaction remained unchanged (78%, 75% last year).

Satisfaction with the provision of gas services has declined from 83% in Dec'21 to 80%, driven by lower satisfaction in ACT (67%, down from 79%).

Households are now less satisfied with the cost of their electricity service (42%, down from 54%). There have also been decreases in satisfaction for the level of competition (59%, down from 64%), customer service (66%, down from 72%), communication (55%, down from 61%), and assistance to manage bills (56%, down from 63%).

The decrease in satisfaction for the level of competition in electricity has been driven by households in NSW (65%, down from 71%), QLD (52%, down from 60%), SA (66%, down from 72%) and ACT (44%, down from 51%).

Satisfaction with the cost of mains gas supply had the greatest decrease (48%, down from 61%), followed by assistance to manage bills (58%, down from 68%). Most other gas satisfaction metrics also decreased from last year.

As well as the lower satisfaction with cost of supply (for both electricity and gas), households are less likely to give positive ratings for value for money, with electricity dropping to 59% (67% last year) and gas dropping to 60% (70% last year). This is more than any of the other utilities.

Declining satisfaction is also translating to concerns about the future, with lower confidence in external factors, such as the benefits of technology and the energy market working in the interests of consumers.

Confidence (rated 7-10 out of 10) that the energy market will make technological advances to manage your energy supply and costs has dropped to 44% (down from 55% last year). This is lower in all states and among small businesses.

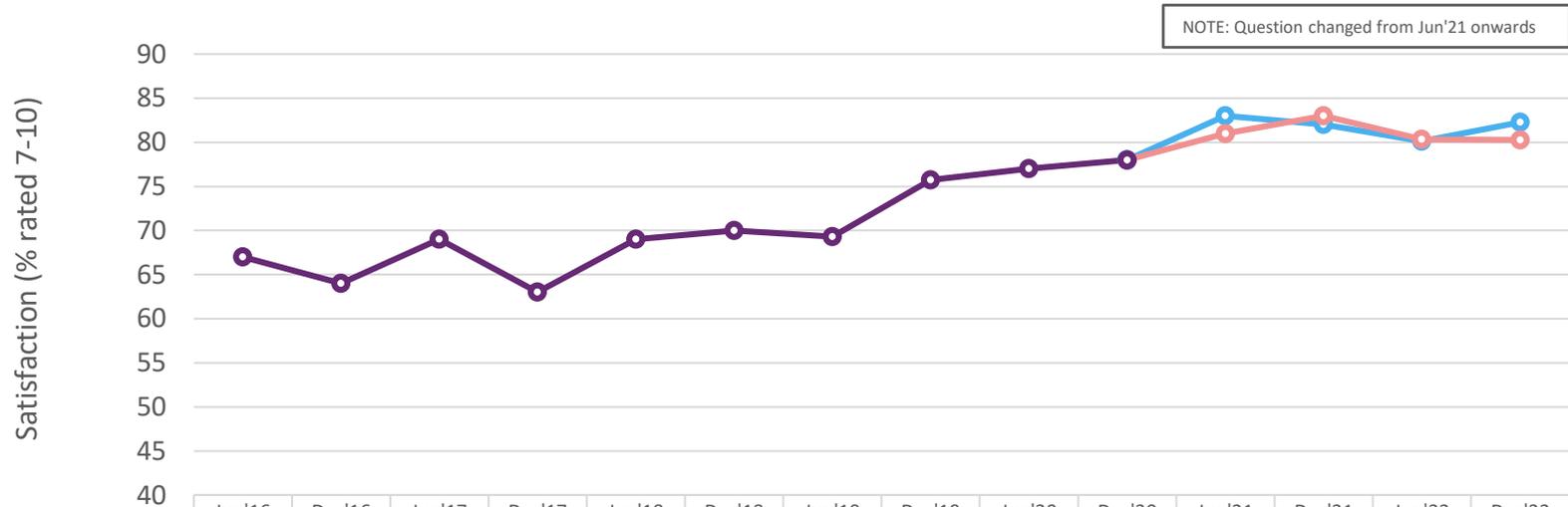
Confidence that the market is working in consumers' best interests is now at 35% (down from 46%), and down in all states except WA.

Satisfaction

- While household satisfaction with their electricity service has remained unchanged since December 2021 (still 82%), there have been large decreases in satisfaction across all other retailer measures.
- Most notably, household satisfaction with the cost of electricity supply has decreased 12% points since last year (now 42% down from 54%), and satisfaction with the cost of gas supply has decreased 13% points (now 48% down from 61%).
- Households are also less satisfied with retailers' assistance to manage their electricity and gas bills (down 7% and 10% points respectively), and the communication from their electricity and gas retailers (down 6% and 7% points respectively).



Satisfaction with retailer measures: Provision of electricity and gas services



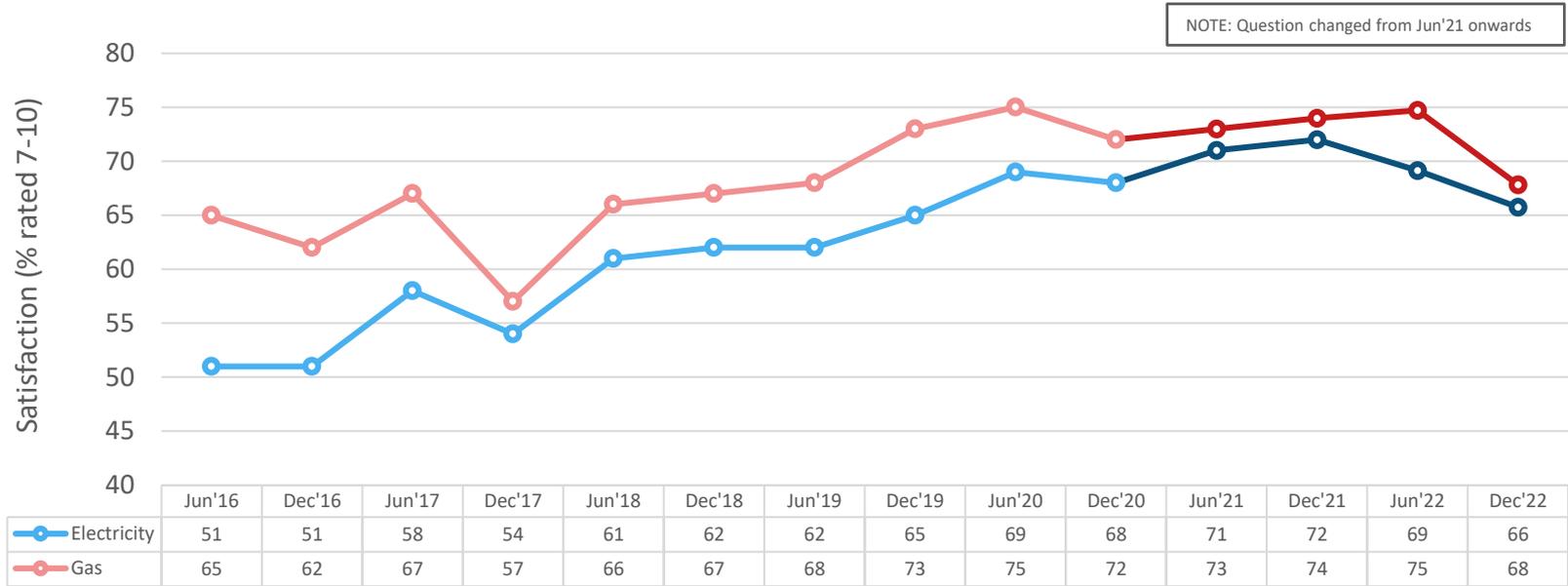
	Jun'16	Dec'16	Jun'17	Dec'17	Jun'18	Dec'18	Jun'19	Dec'19	Jun'20	Dec'20	Jun'21	Dec'21	Jun'22	Dec'22
Overall Satisfaction	67	64	69	63	69	70	69	76	77	78				
Electricity Satisfaction											83	82	80	82
Gas Satisfaction											81	83	80	80

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= 1,173)

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)

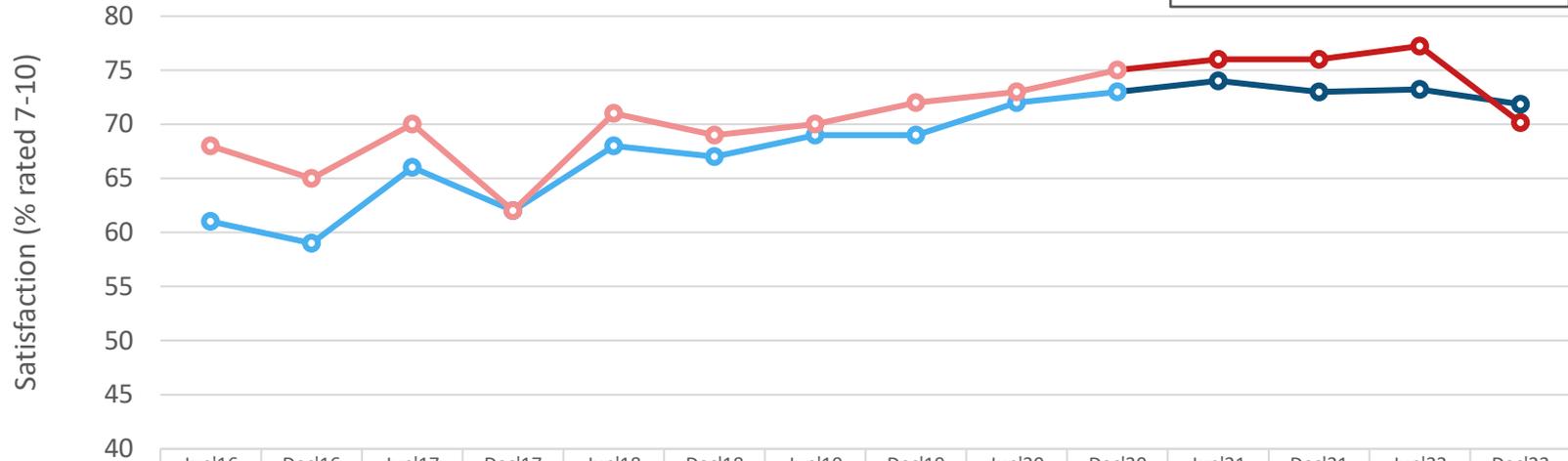
Q (from Jun'21): How satisfied are you with the following aspects of your electricity retailer in the past 6 months? **Overall customer service**, Base size: All households (min. n= 2,120)

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= 1,173)

Satisfaction with retailer measures: Billing

NOTE: Question changed from Jun'21 onwards



— Electricity

— Gas

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)

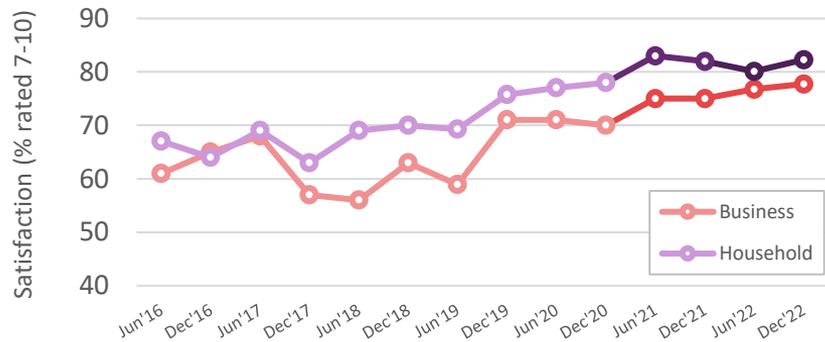
Q (from Jun'21): How satisfied are you with the following aspects of your electricity retailer in the past 6 months? **Billing and usage information is clear and simple to understand**, Base size: All households (min. n= 2,120)

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)

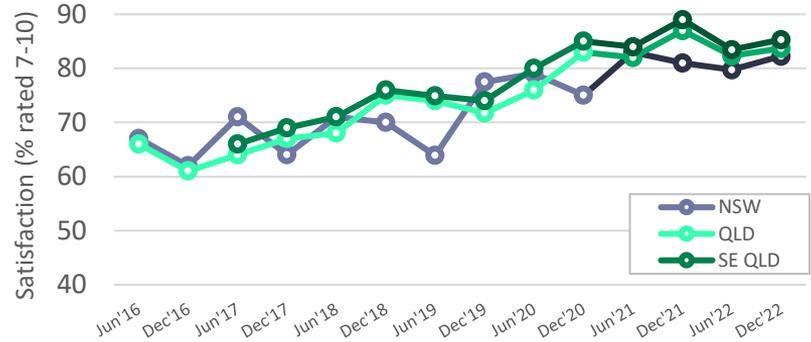
Q (from Jun'21): How satisfied are you with the following aspects of your gas retailer in the past 6 months? **Billing and usage information is clear and simple to understand**, Base size: All households with a mains gas supply (min. n= 1,173)

Overall satisfaction with electricity services

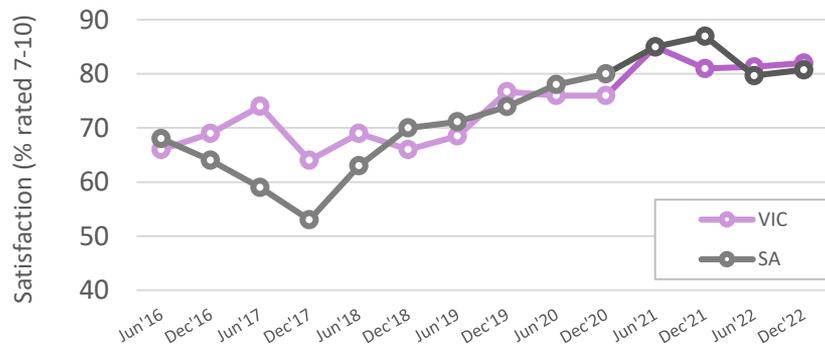
Overall Satisfaction - Business & Household



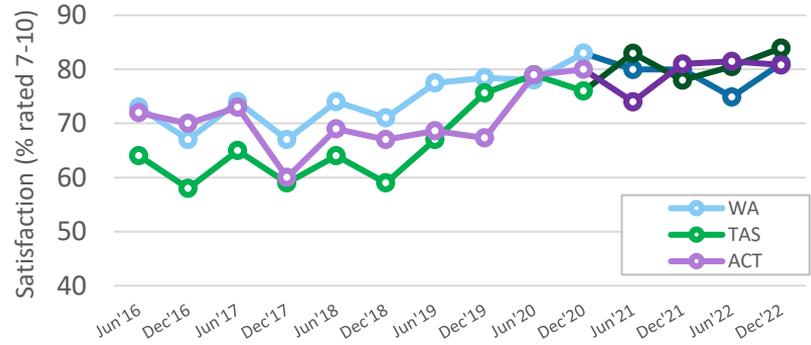
Overall Satisfaction - NSW, QLD & SE QLD



Overall Satisfaction - VIC & SA



Overall Satisfaction - WA, TAS & ACT

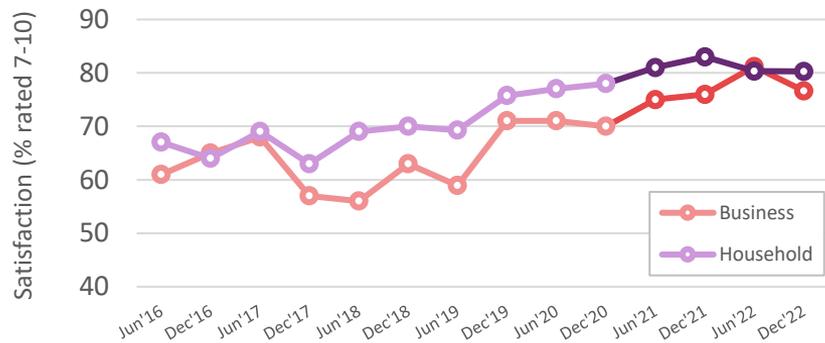


Q (Jun'16-Dec'20): How satisfied are you with the following? **The provision of your electricity and gas services overall over the last 6 months**, Base size: All households (min. n=2,000)

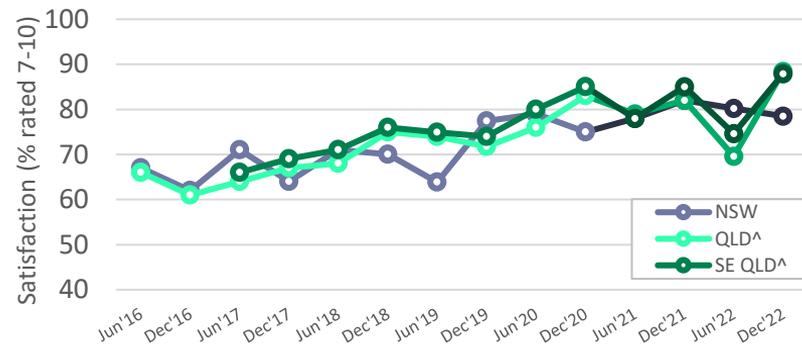
Q (from Jun'21): How satisfied are you with the following elements of your electricity service over the past 6 months? **The provision of your electricity services**, Base size: All households (min. n= 2,120)

Overall satisfaction with gas services

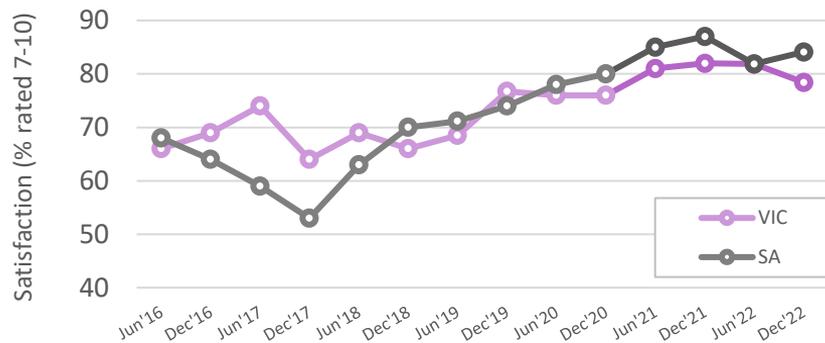
Overall Satisfaction - Business & Household



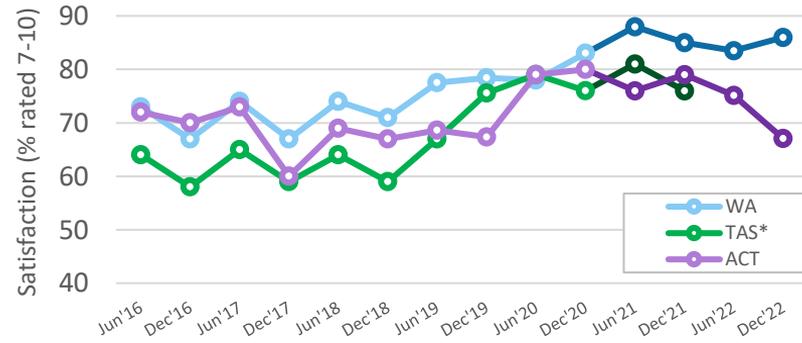
Overall Satisfaction - NSW, QLD^ & SE QLD^



Overall Satisfaction - VIC & SA



Overall Satisfaction - WA, TAS* & ACT

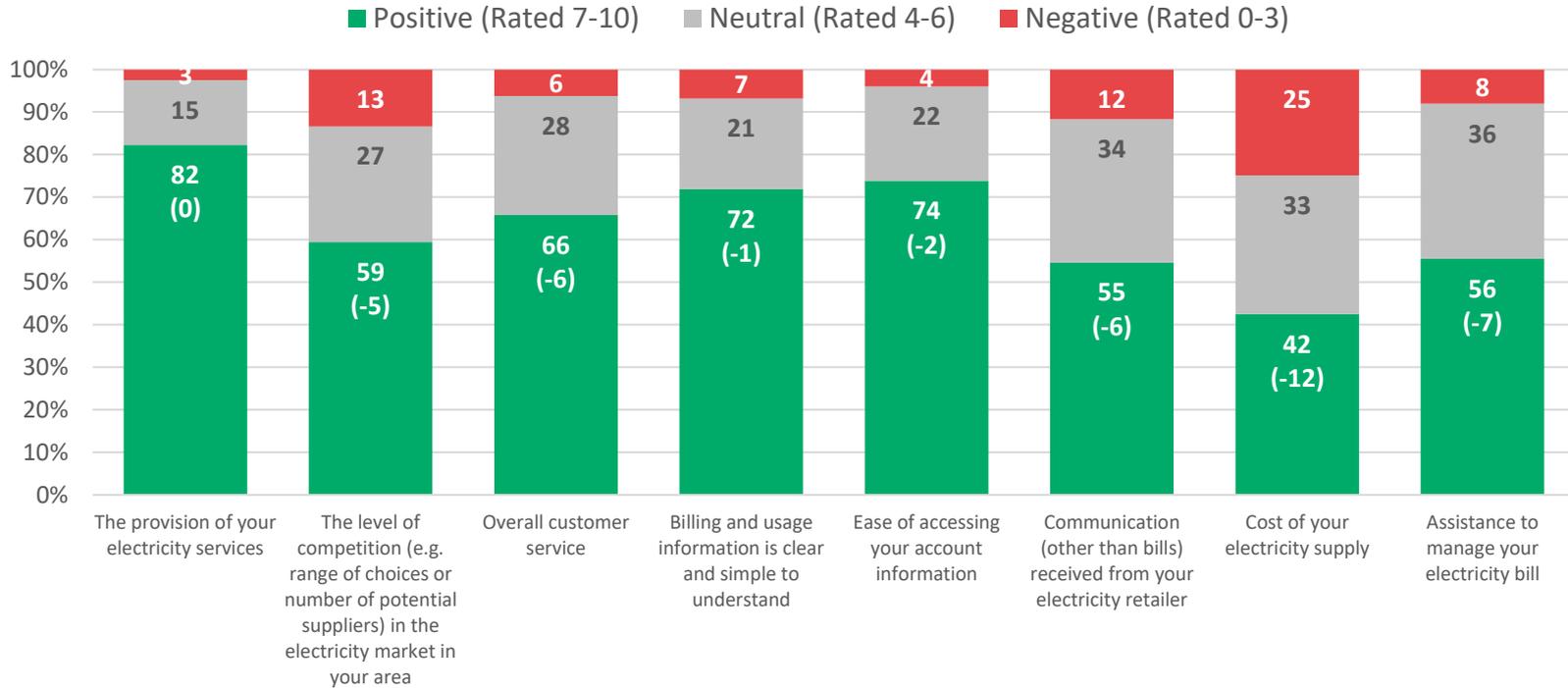


Q (Jun'16-Dec'20): How satisfied are you with the following? **The provision of your electricity and gas services overall over the last 6 months**, Base size: All households (min. n=2,000)

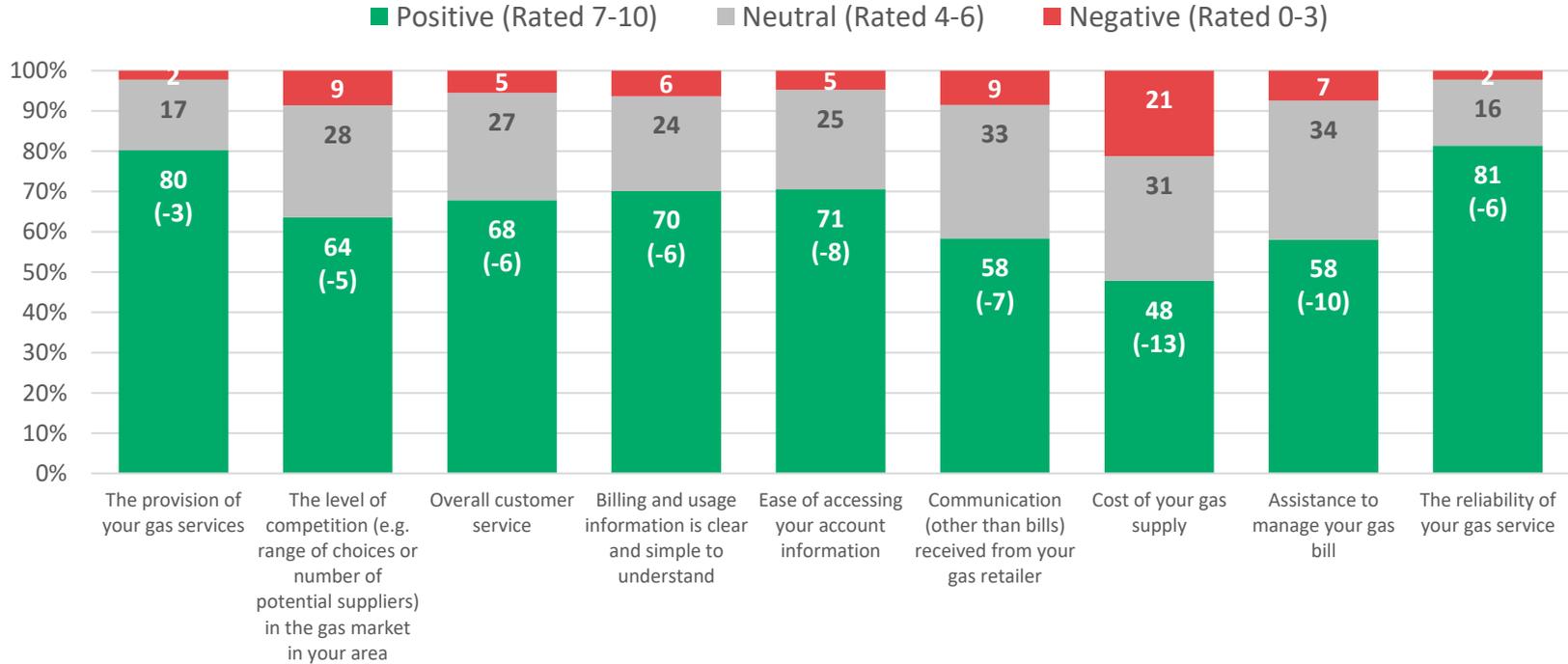
Q (from Jun'21): How satisfied are you with the following elements of your gas service over the past 6 months? **The provision of your gas services**, Base size: All households with a mains gas supply (min. n= 1,173)

^Caution small sample size for QLD & SE QLD. *Results not shown for TAS Jun'22 & Dec'22 due to extremely small sample size.

Satisfaction with retailer measures: Electricity



Satisfaction with retailer measures: Gas

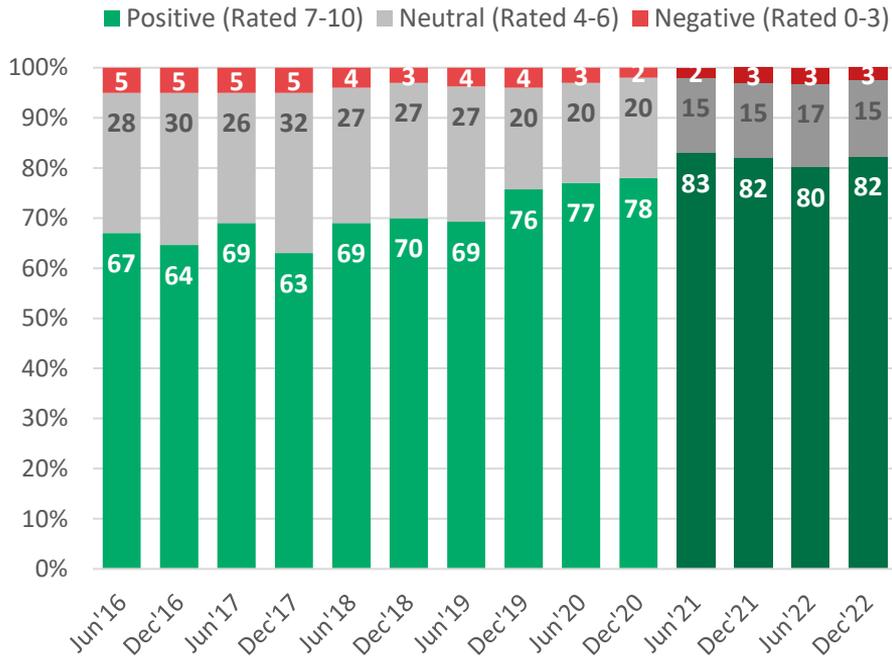


Q (Jun'16-Dec'20): How satisfied are you with the following? Base size: All households with a mains gas supply (min. n=1,000)

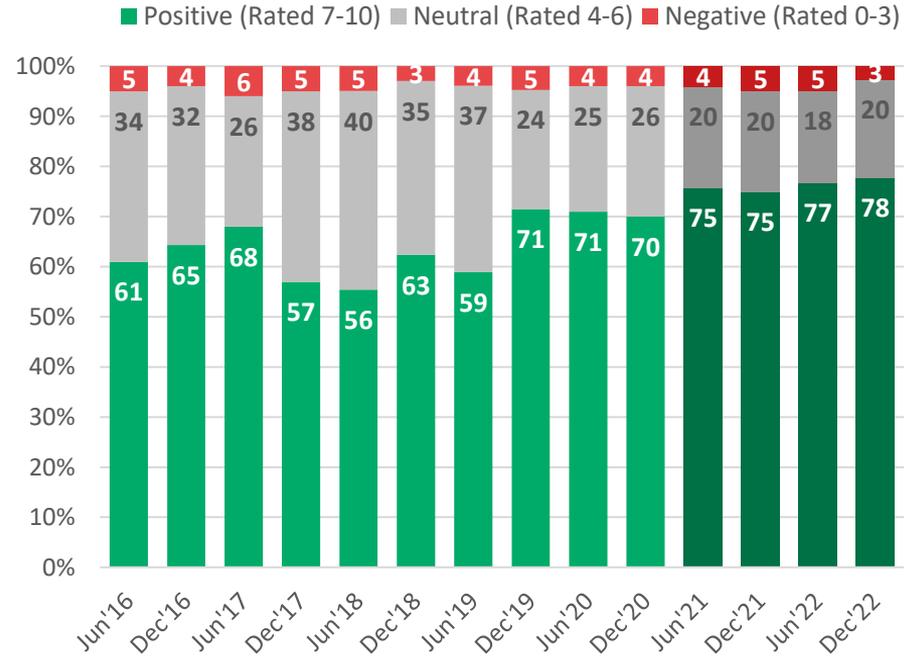
Q (from Jun'21): How satisfied are you with the following elements of your gas service over the past 6 months? Base size: All households with a mains gas supply (min. n=1,173)

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)

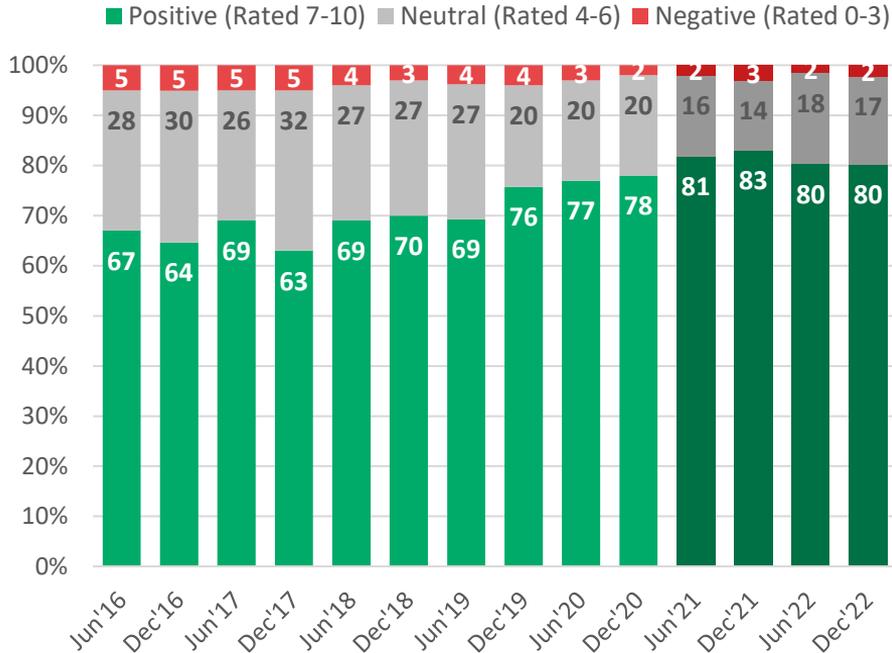
Q (from Jun'21): How satisfied are you with the following elements of your electricity service over the past 6 months? **The provision of your electricity services**, Base size: All households (min. n= 2,120)

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)

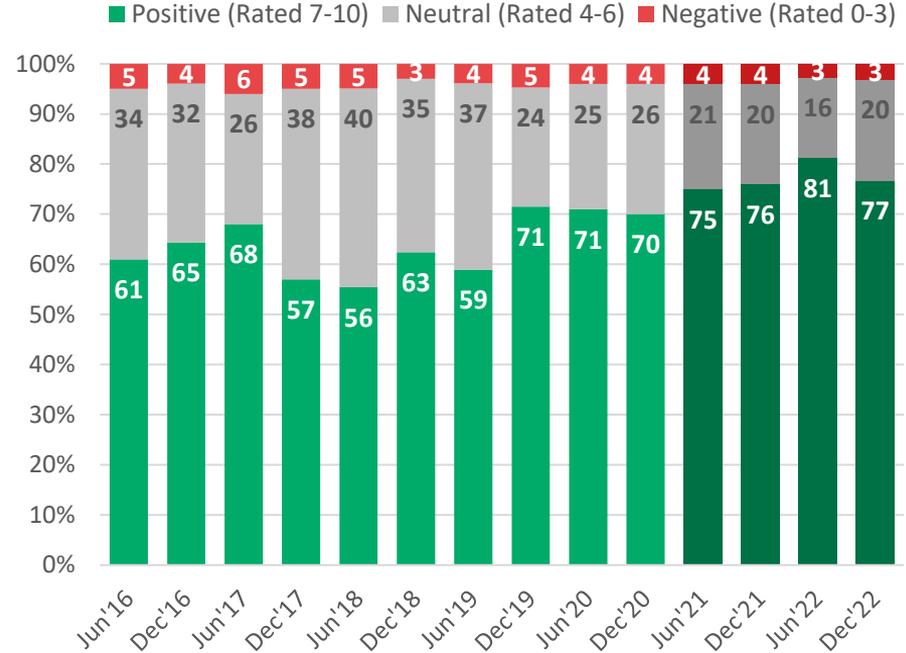
Q (from Jun'21): How satisfied are you with the following elements of your electricity service over the past 6 months? **The provision of your electricity services**, Base size: All businesses (min. n=500)

Overall satisfaction with gas services (Business/Household)

Overall Satisfaction - Household



Overall Satisfaction - Business



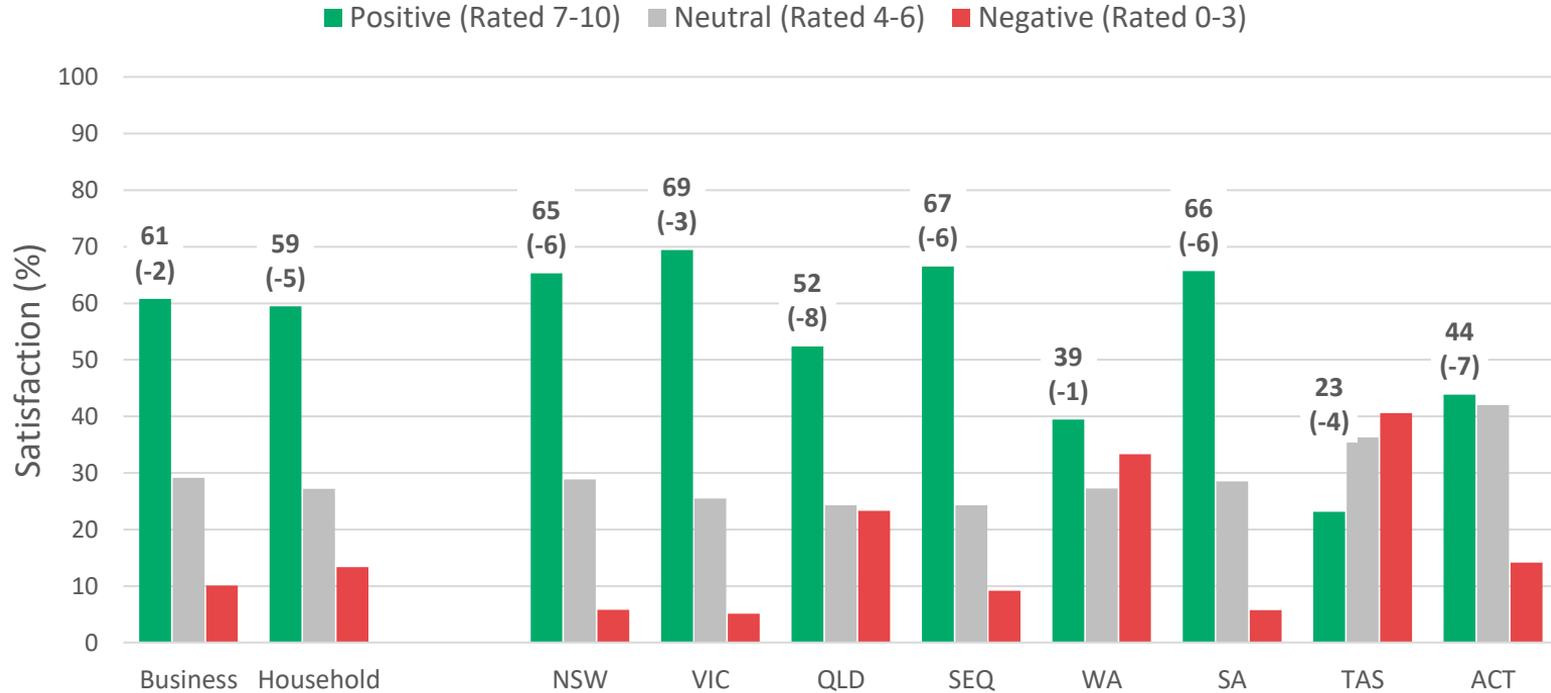
Q (Jun'16-Dec'20): How satisfied are you with the following? **The provision of your electricity and gas services overall over the last 6 months**, Base size: All households (min. n=2,000)

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= 1,173)

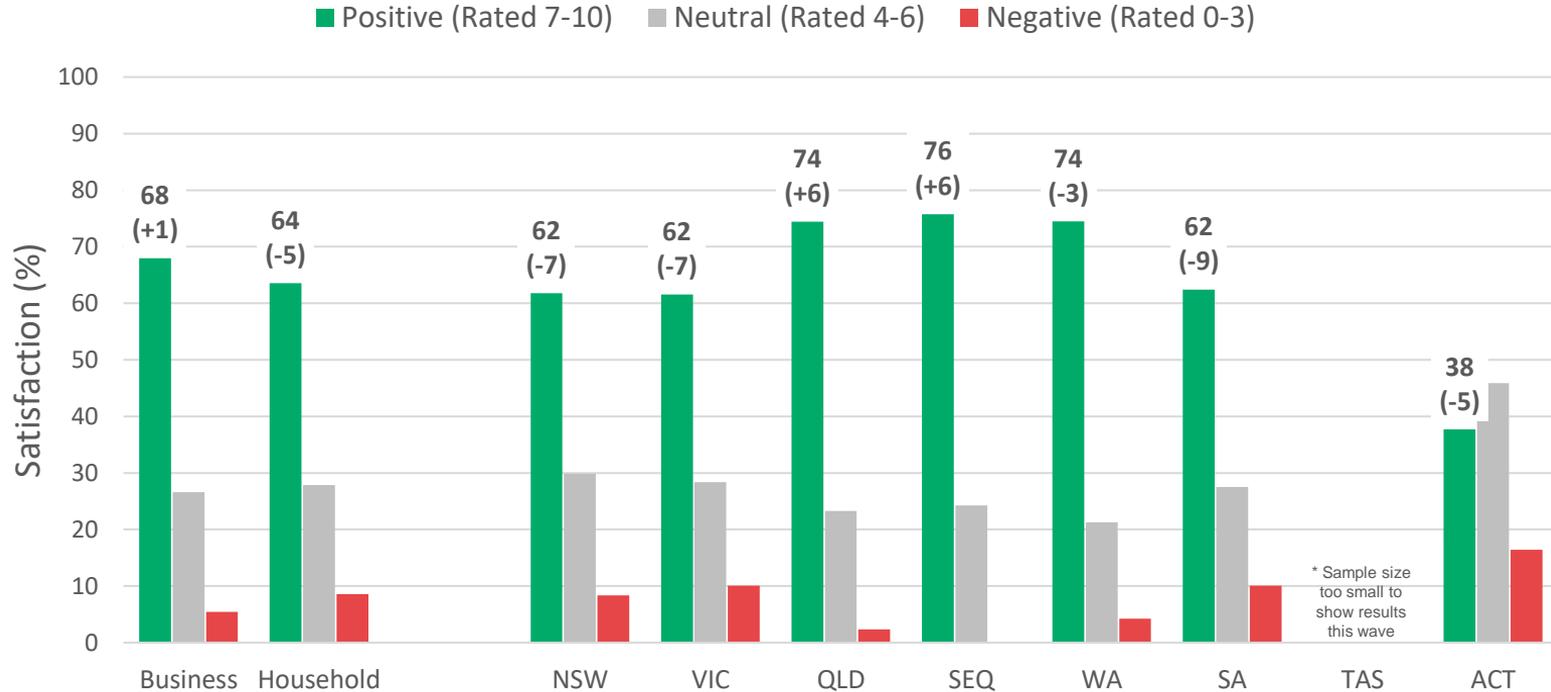
Q (Jun'16-Dec'20): How satisfied are you with the following? **The provision of your electricity and gas services overall over the last 6 months**, Base size: All businesses (min. n=280)

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=266)

Satisfaction with level of competition: Electricity



Satisfaction with level of competition: Gas

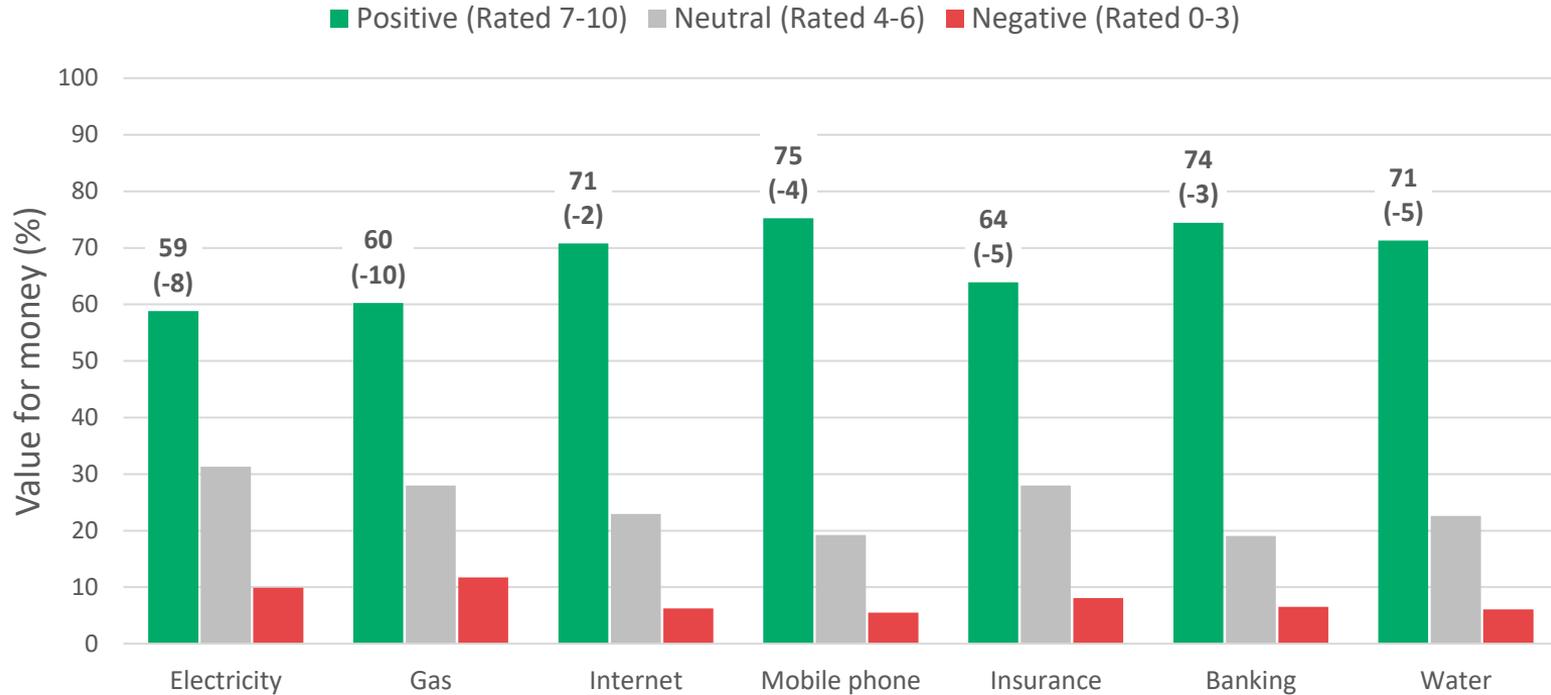


Value for money & Outages

- There have been year-on-year decreases in the perceived value for money of electricity and gas (down 8% and 10% points respectively). Positive rating for the value for money of electricity is now at 59% (down from 67% last year) and gas is now at 60% (down from 70% last year).
- 28% of households have experienced an electricity outage in the last 6 months. This is consistent with December 2021 (30%).
- Among households who experienced an electrical outage, there were decreases in satisfaction with the number of outages, the time it took to restore power and the communication from electricity suppliers during the outages.



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)

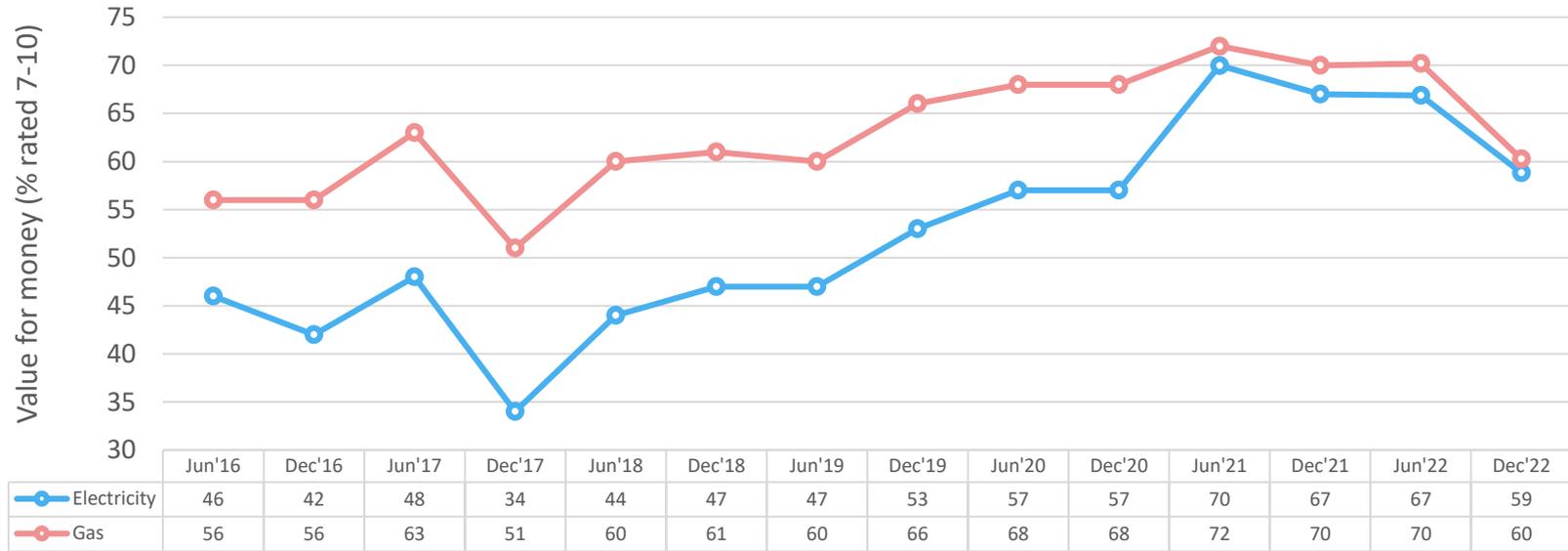
Q: How would you rate the overall value for money of the products and services provided by your gas retailer in the past 6 months?

Base size: All households with a mains gas supply (min n=1,173)

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=2,000)

Value for money



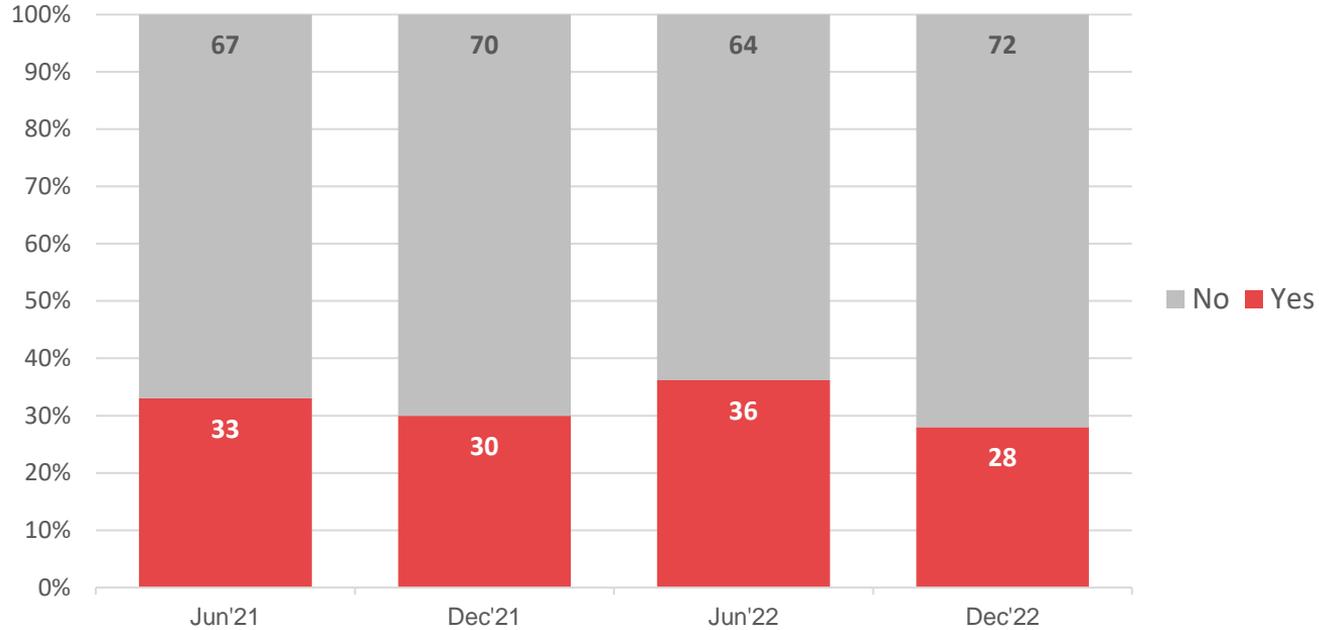
Q: How would you rate the overall value for money of the products and services provided by your electricity company in the past 6 months?

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

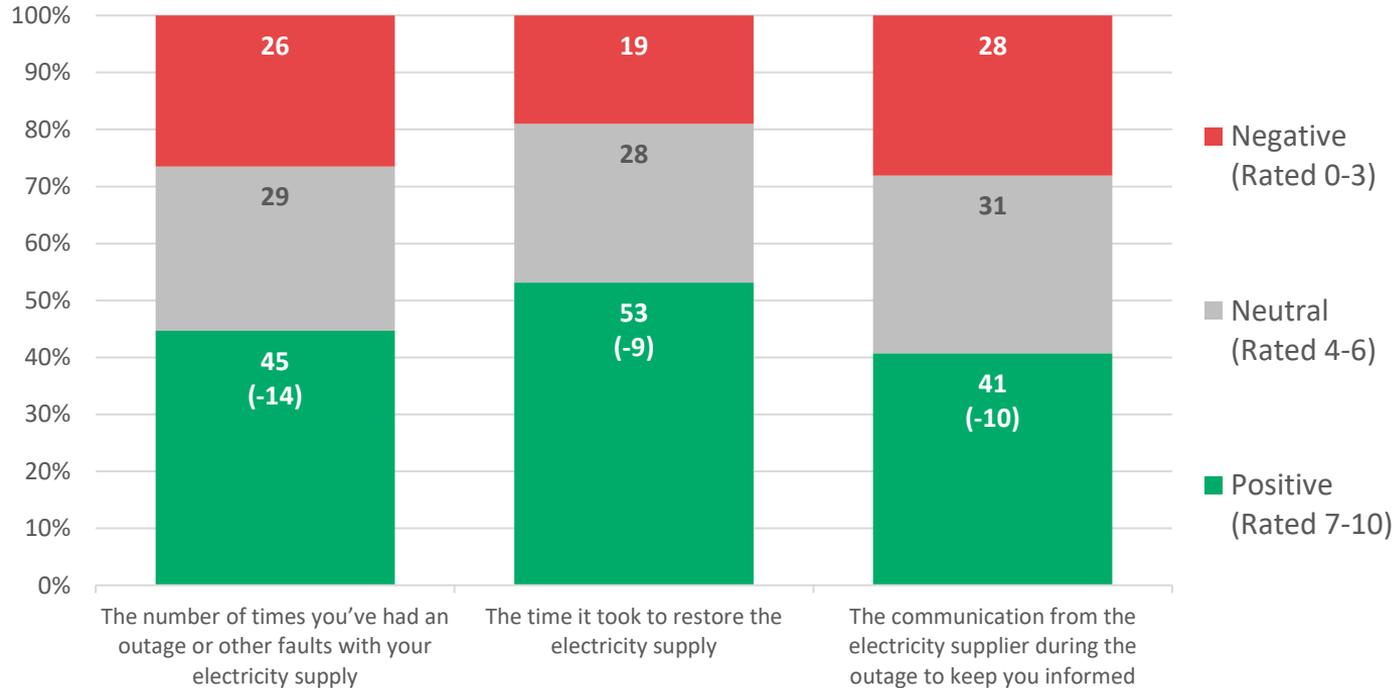
Q: How would you rate the overall value for money of the products and services provided by your gas retailer in the past 6 months?

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?

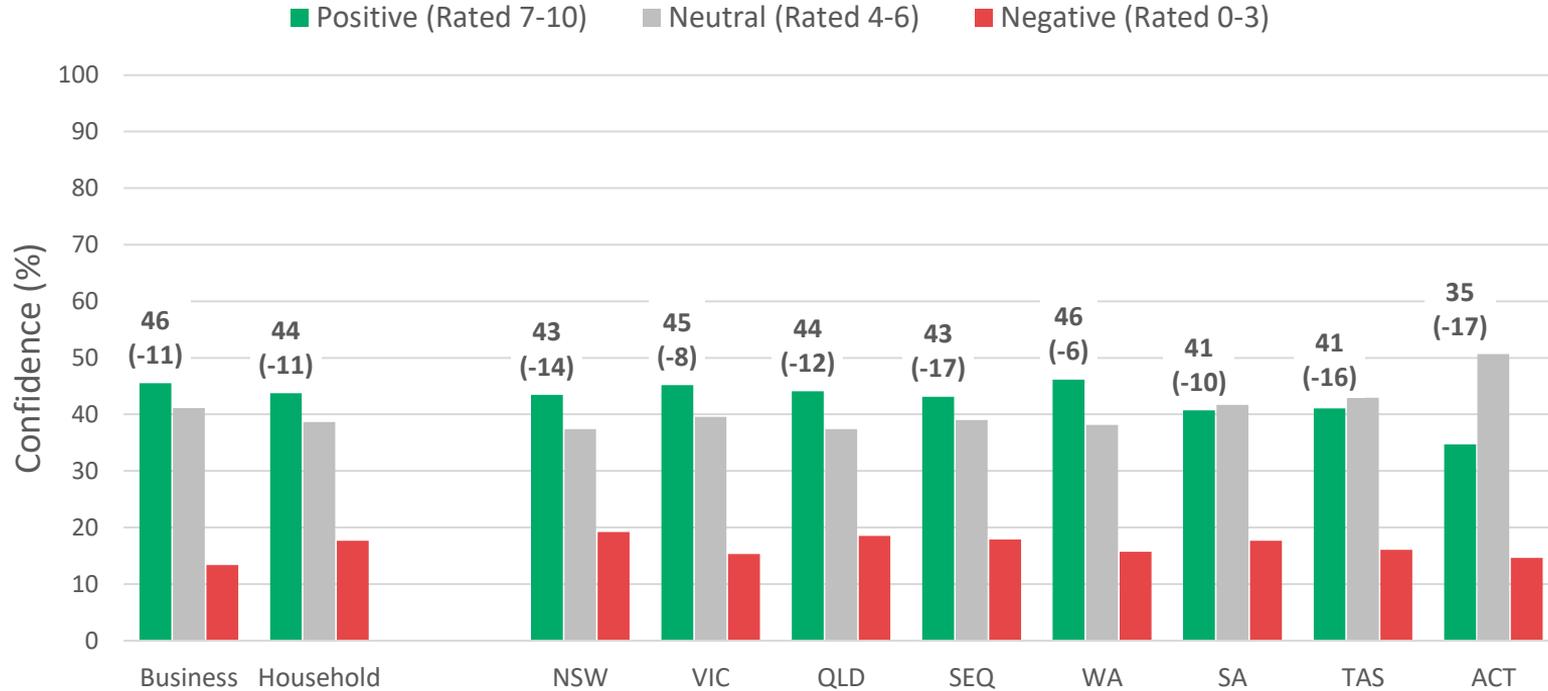
Base size: All households who have experienced an outage in the last 6 months (min n=676)

Household Confidence

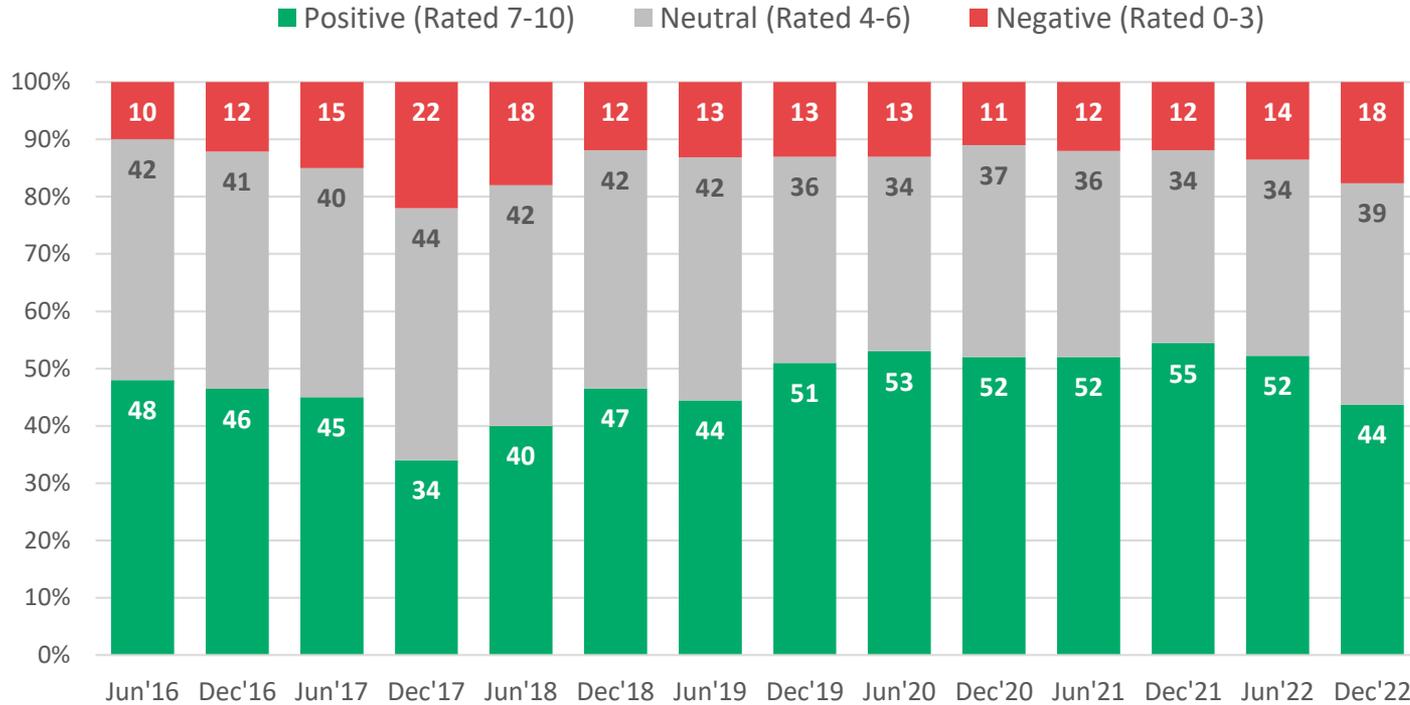
- Household confidence has decreased across all measures in the past year, particularly in advances in technology, future reliability and the overall market (all down 11% points from last year).
- Nationally, 35% of households are confident in the overall market, down from 46% last year, the lowest it has been in three years (33% December 2019). This national decrease in confidence has been driven by Queensland (33%, down 17% points from last year), South Australia (30%, down 16% points) and the Australian Capital Territory (24%, down 11% points).
- One-third of households are familiar with the Energy Ombudsman (32%).



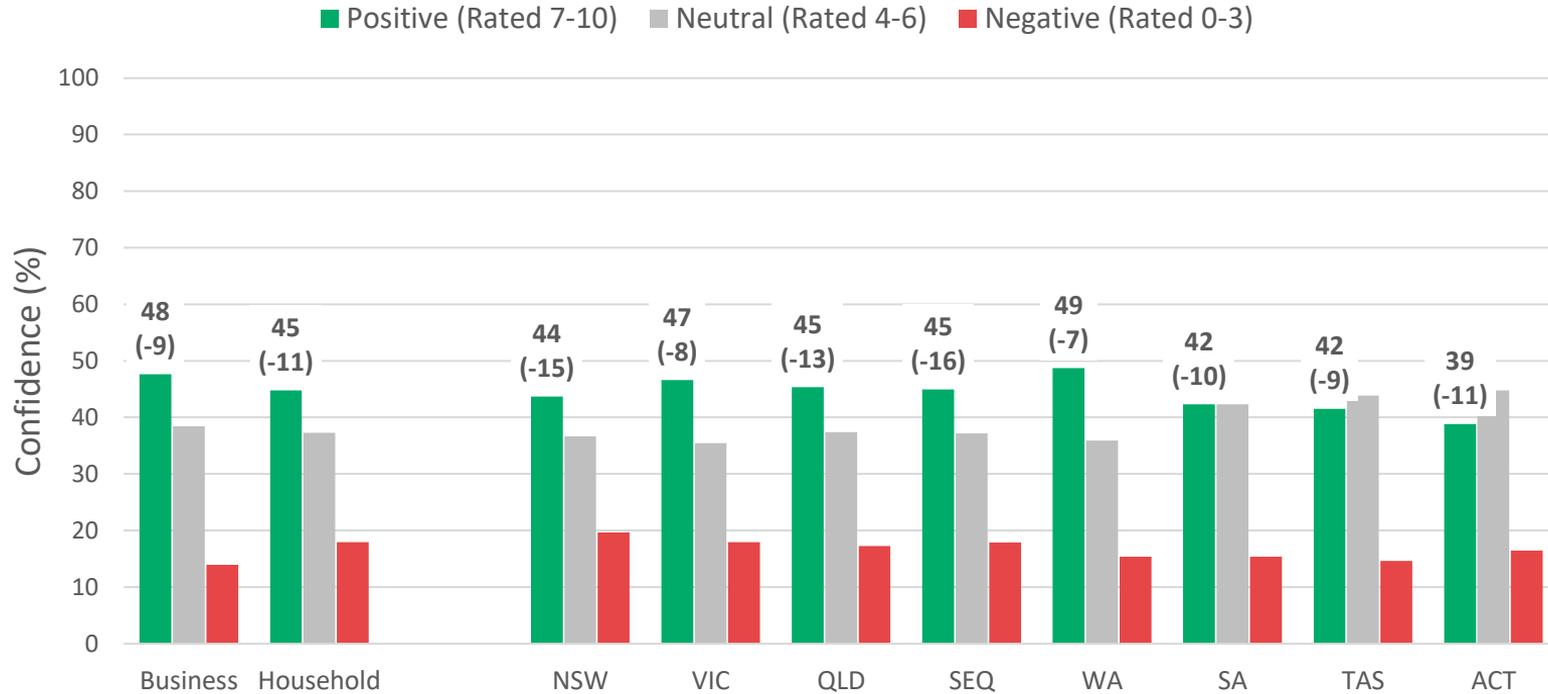
Confidence in advances in technology



Confidence in advances in technology



Confidence in future reliability

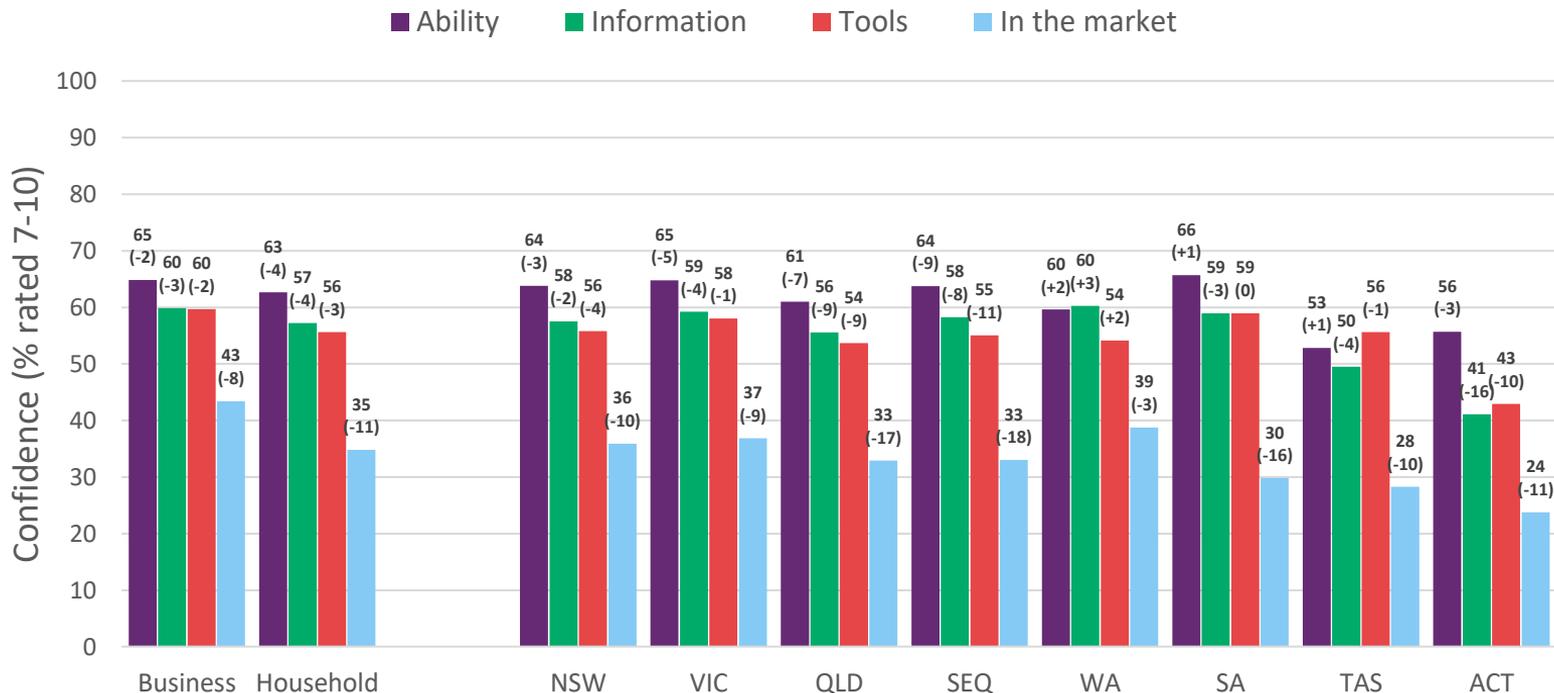


Q: Thinking about the overall market outcomes, how confident are you that the energy market will provide better outcomes for you in 5 years, in terms of...? **Provide a more reliable supply**

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

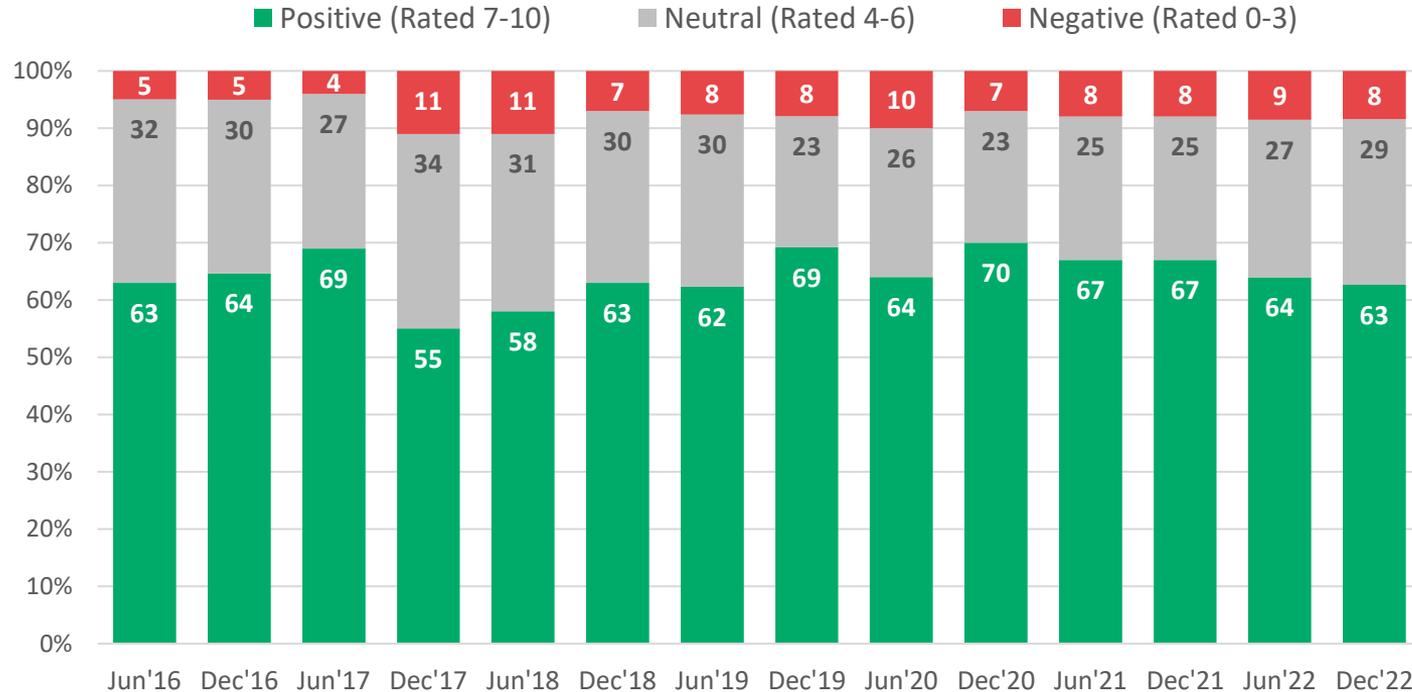
That you have the tools and assistance you need to manage your energy use and costs, by which we mean electricity meters, smart phone devices, apps or other tools

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)

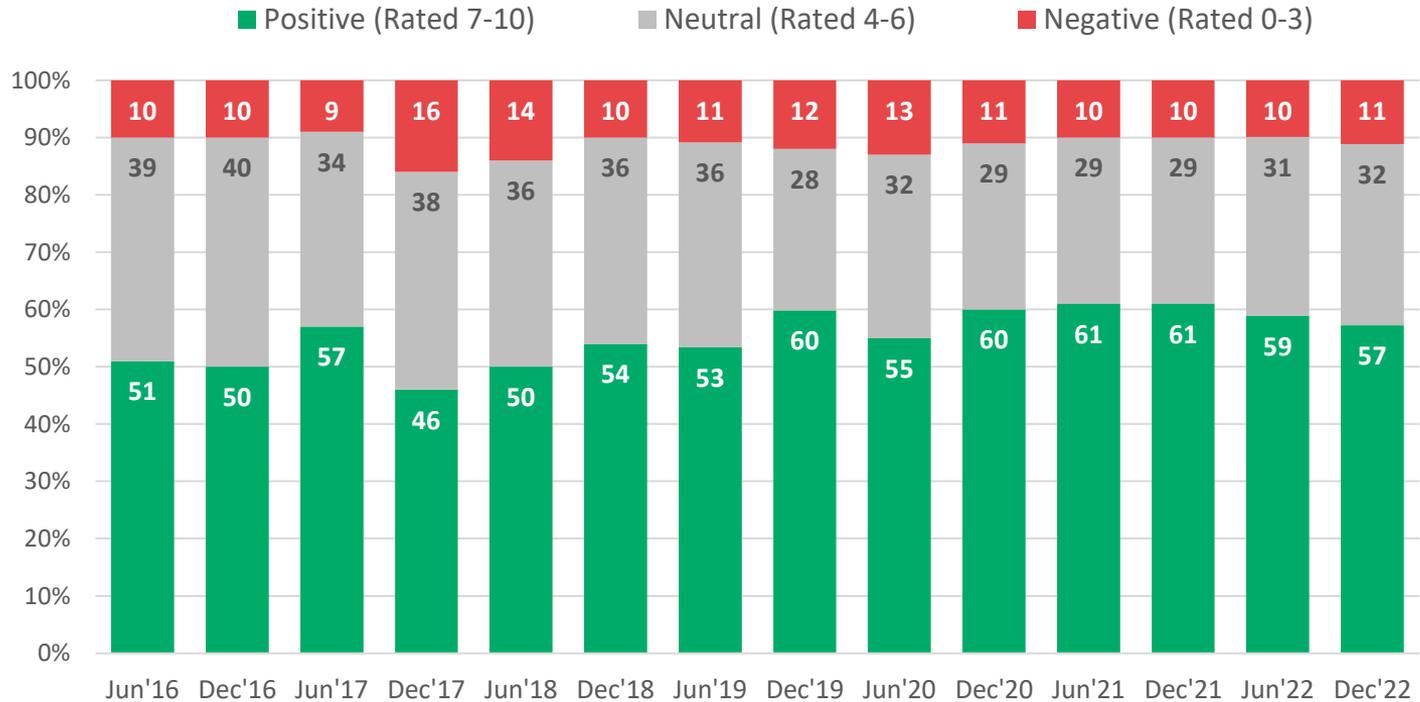
Confidence in ability to make choices



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)

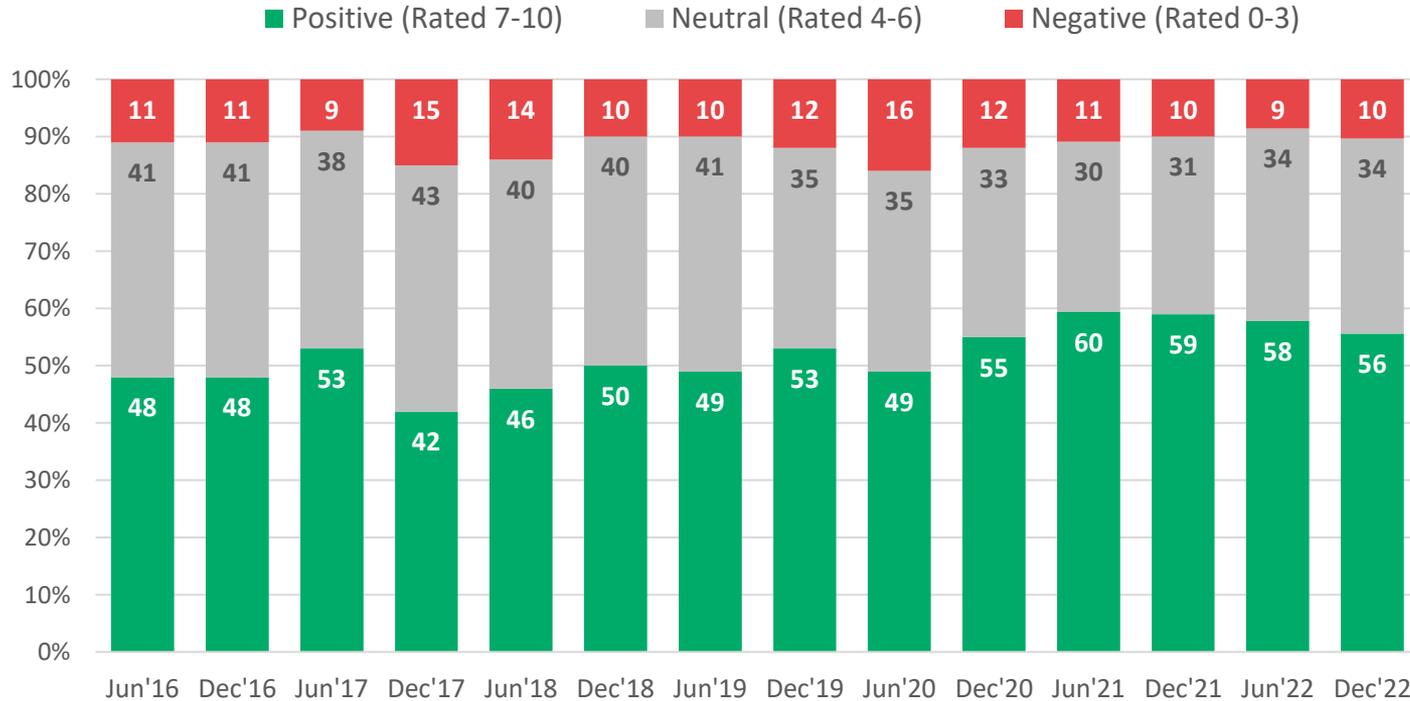
Confidence in availability of enough easily understood information



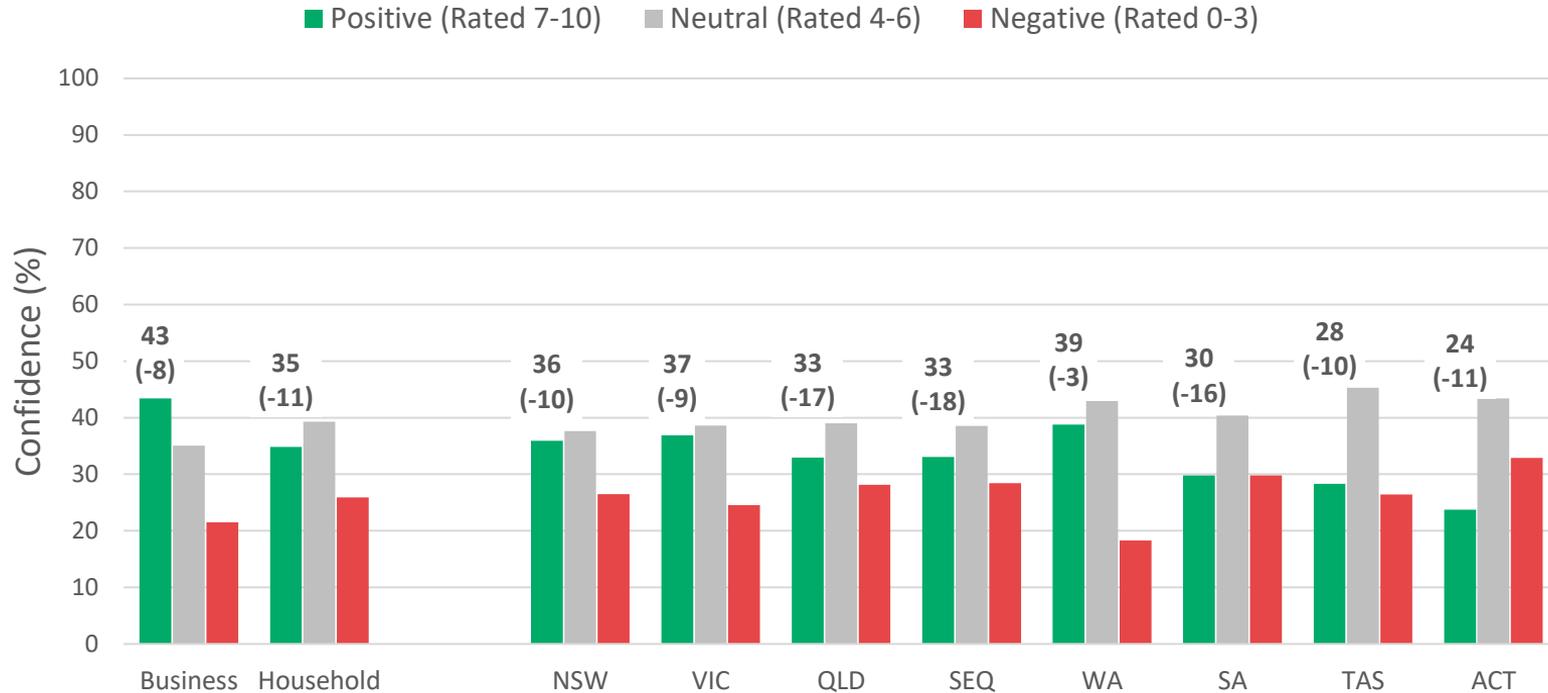
Q: How confident do you feel in the following...? **That there is enough easily understood information available to you to make decisions about energy products and services, by which we mean information available on the internet, through energy comparison websites or elsewhere**

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

Confidence in availability of tools



Confidence in the market

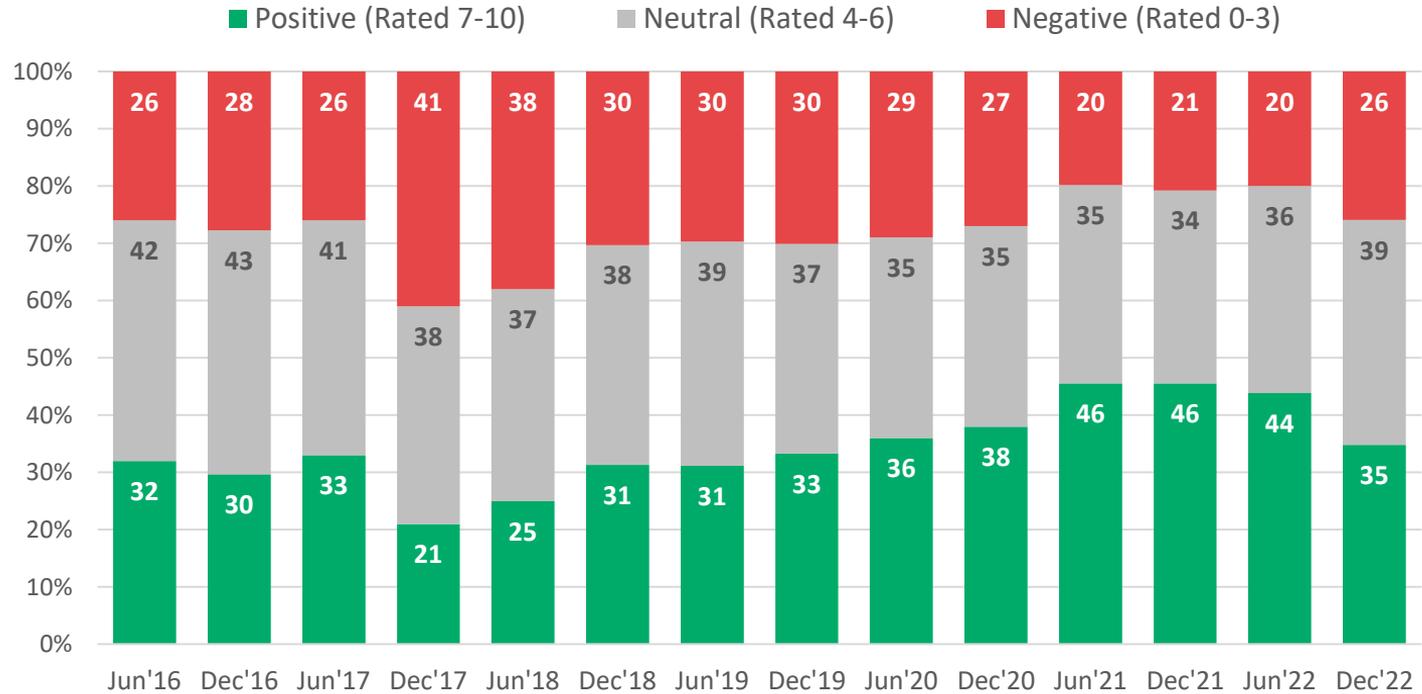


Q: How confident are you that the overall market is working in your long-term interests? By 'the market' we mean, the energy industry and energy regulators.

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

Base size: All businesses (min n=500)

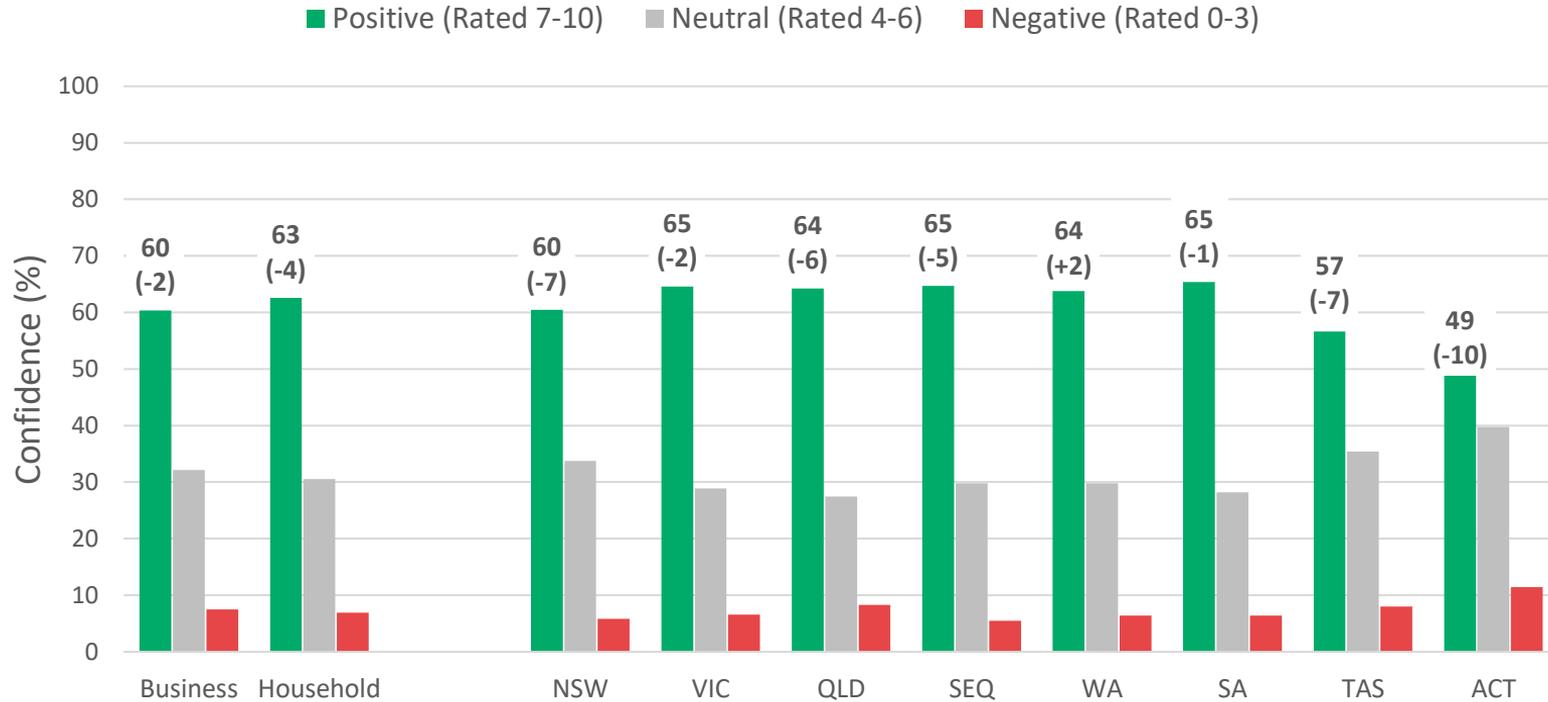
Confidence in the market



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

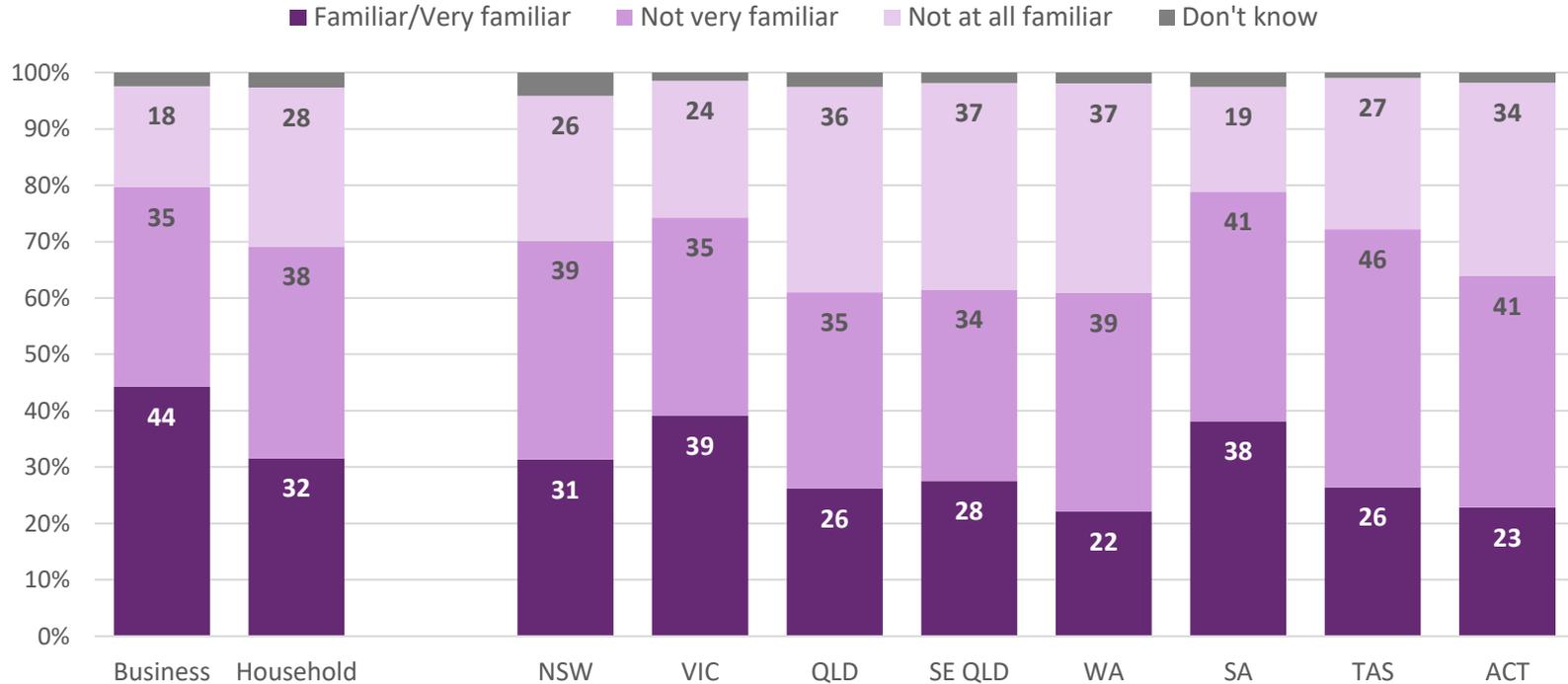


Q: How confident do you feel in the following...? **Your ability to get a problem with your energy services resolved... through your energy company or a third party**

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

Base size: All businesses (min n=500)

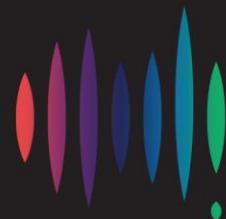
Familiarity with Ombudsman services



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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