

ENERGY CONSUMER SENTIMENT SURVEY

Small Business Topline Results
December 2022

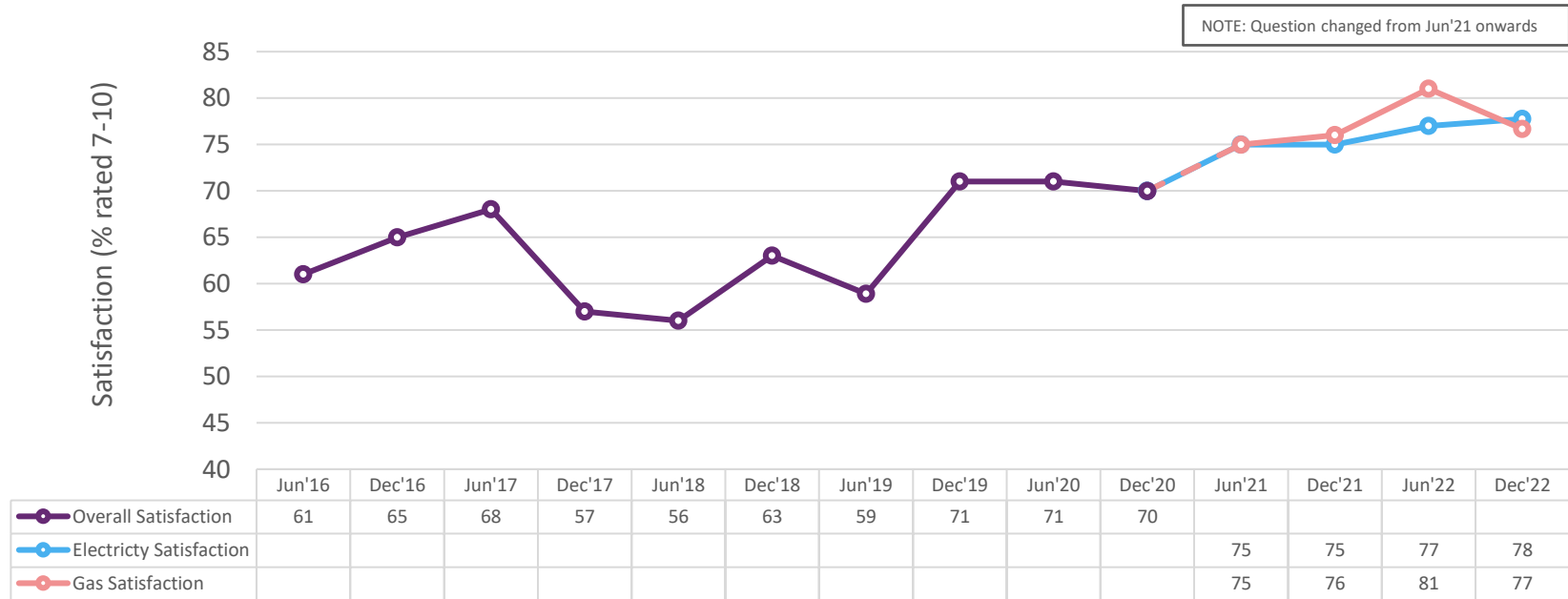


Satisfaction

- Small business satisfaction with electricity is now at 78% (75% last year) with gas at 77% (76% last year).
- Small business satisfaction has decreased across most other retailer measures, particularly regarding price. Satisfaction with the cost of electricity supply has decreased 13% points since last year (now 44% down from 57%), and satisfaction with the cost of gas supply has decreased 9% points (now 55% down from 64%).
- Small businesses are also less satisfied with retailers' assistance to manage their electricity and gas bills (down 8% and 4% points respectively).



Satisfaction with retailer measures: Provision of electricity and gas services

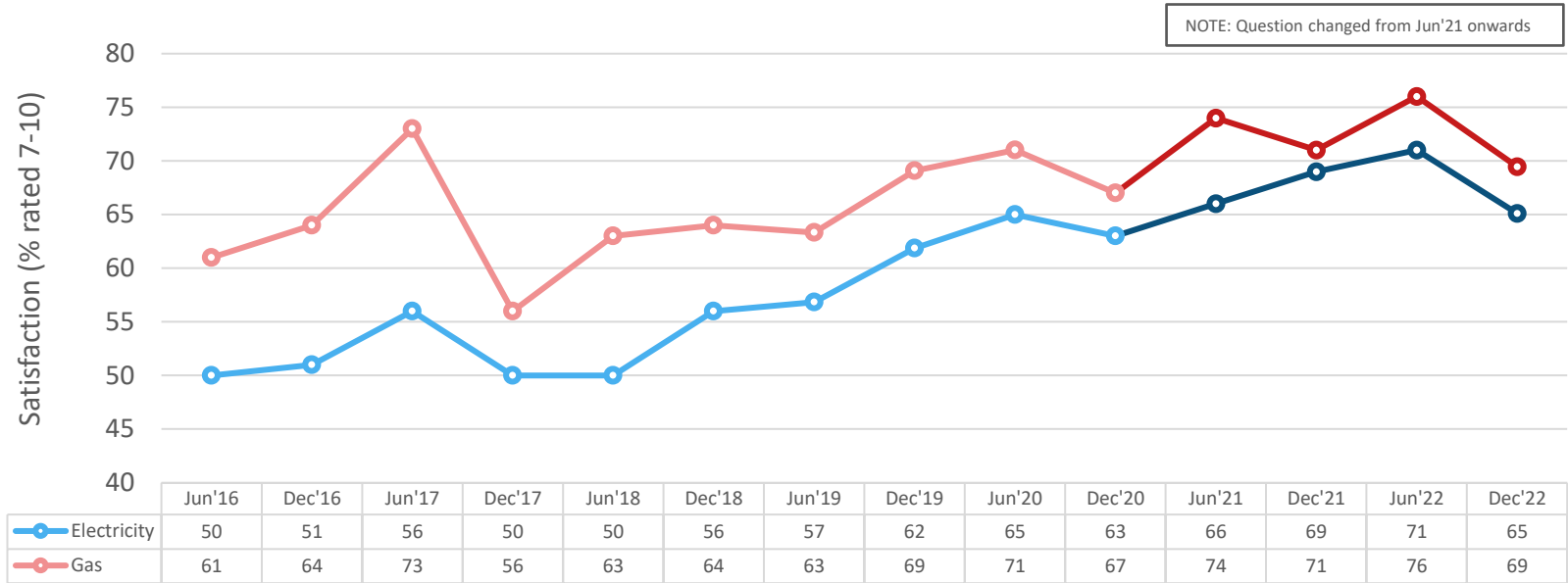


Q (Jun'16-Dec'20): How satisfied are you with the following? **The provision of your electricity and gas services overall over the last 6 months**, Base size: All businesses (min. n=280)

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=266)

Satisfaction with retailer measures: Customer service



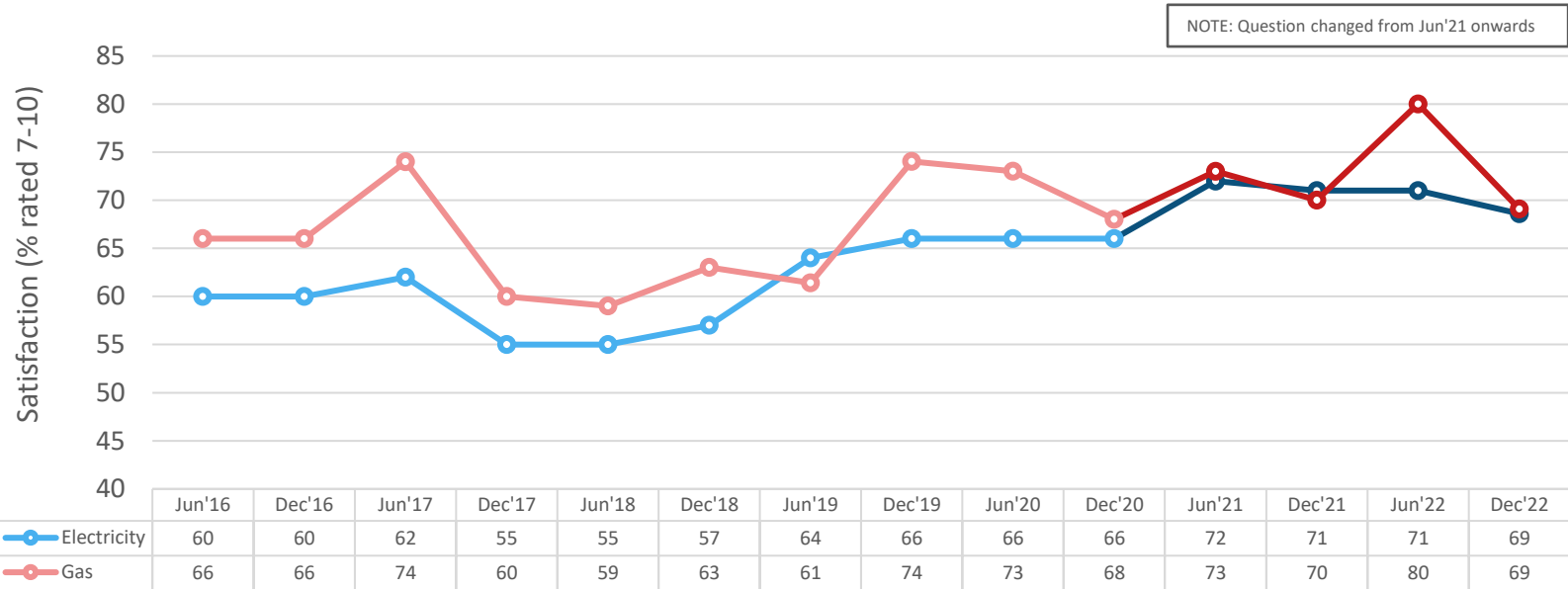
Q (Jun'16-Dec'20): How satisfied are you with the following? **The overall quality of customer service provided by your electricity company in the past 6 months**, Base size: All businesses (min. n=280)

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=266)

Satisfaction with retailer measures: Billing



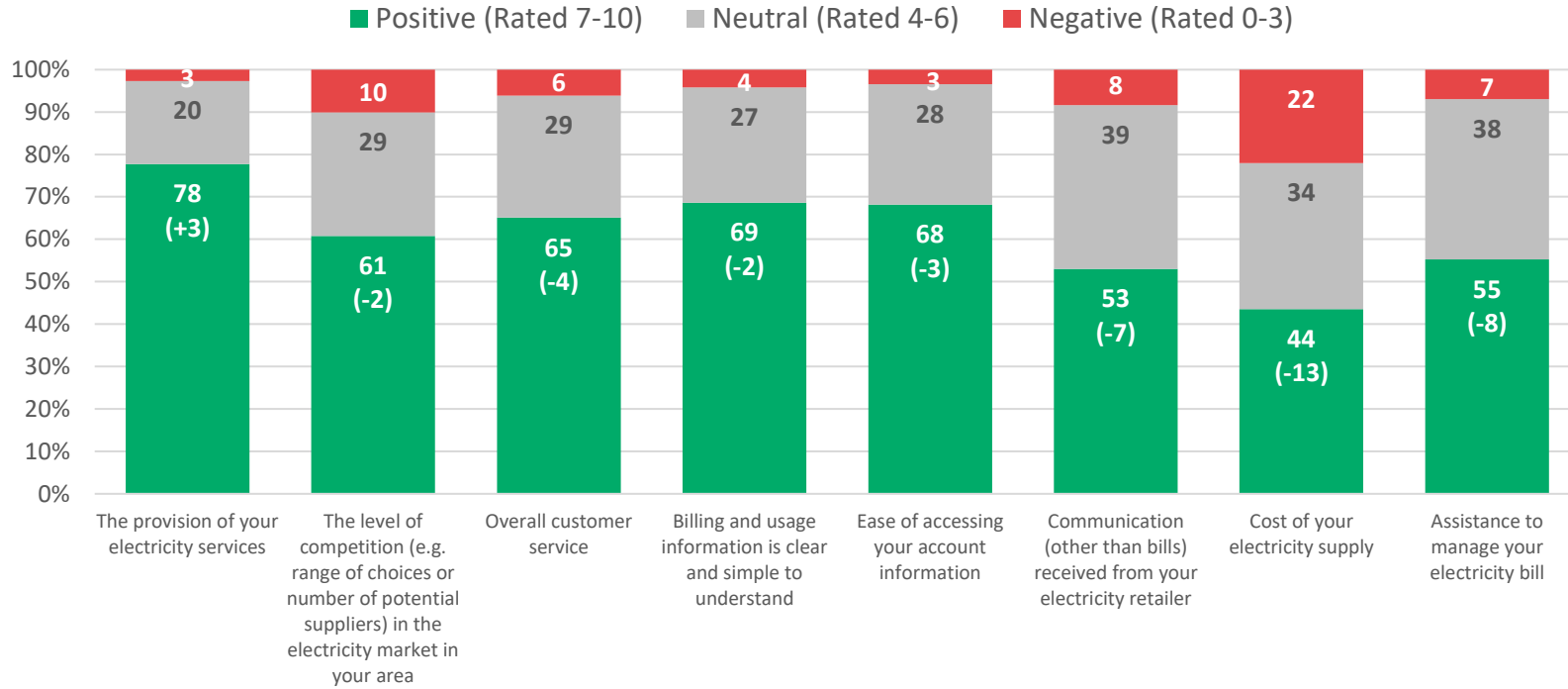
Q (Jun'16-Dec'20): How satisfied are you with the following? **The billing and account options (such as the option of monthly billing, online accounts etc.) currently available to you from your electricity supplier**, Base size: All businesses (min. n=280)

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)

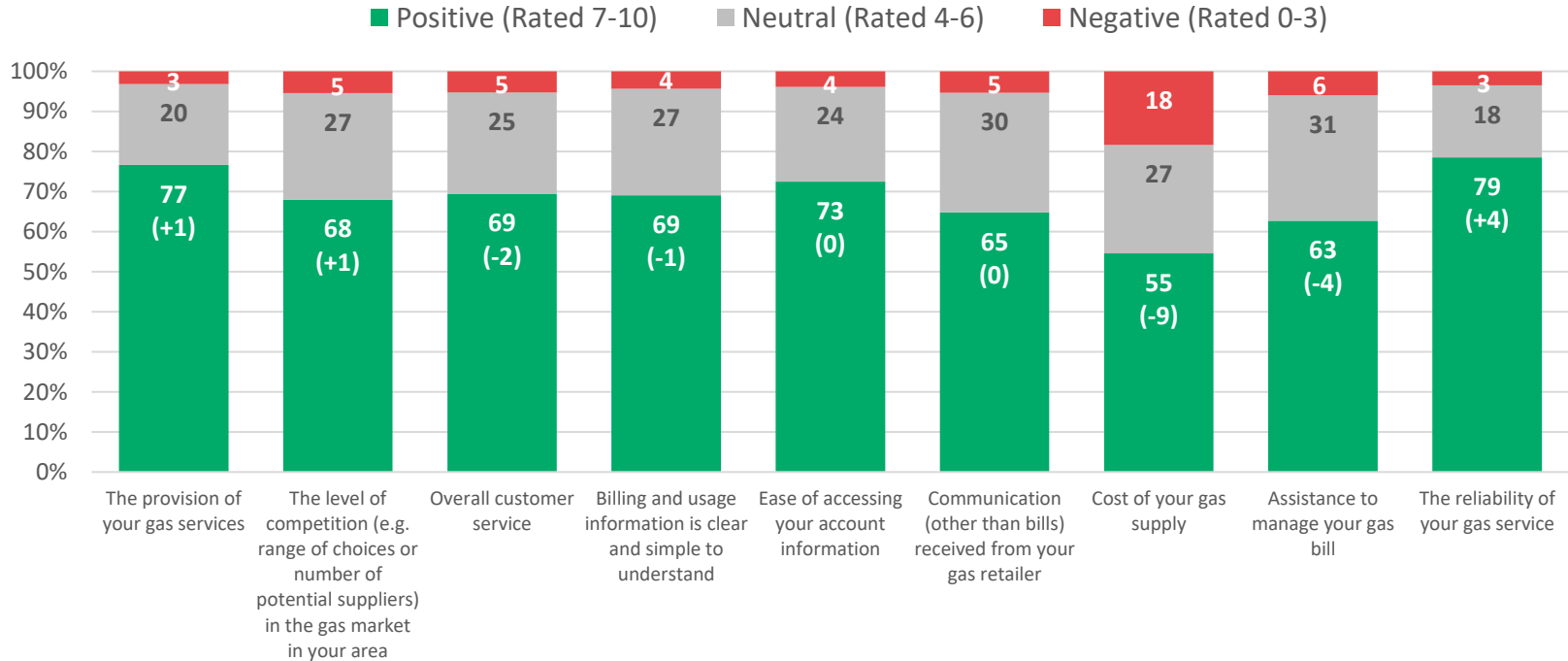
Q (Jun'16-Dec'20): How satisfied are you with the following? **The billing and account options (such as the option of monthly billing, online accounts etc.) currently available to you from your gas supplier**, Base size: All businesses with a main gas supply (min. n=199)

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=266)

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?

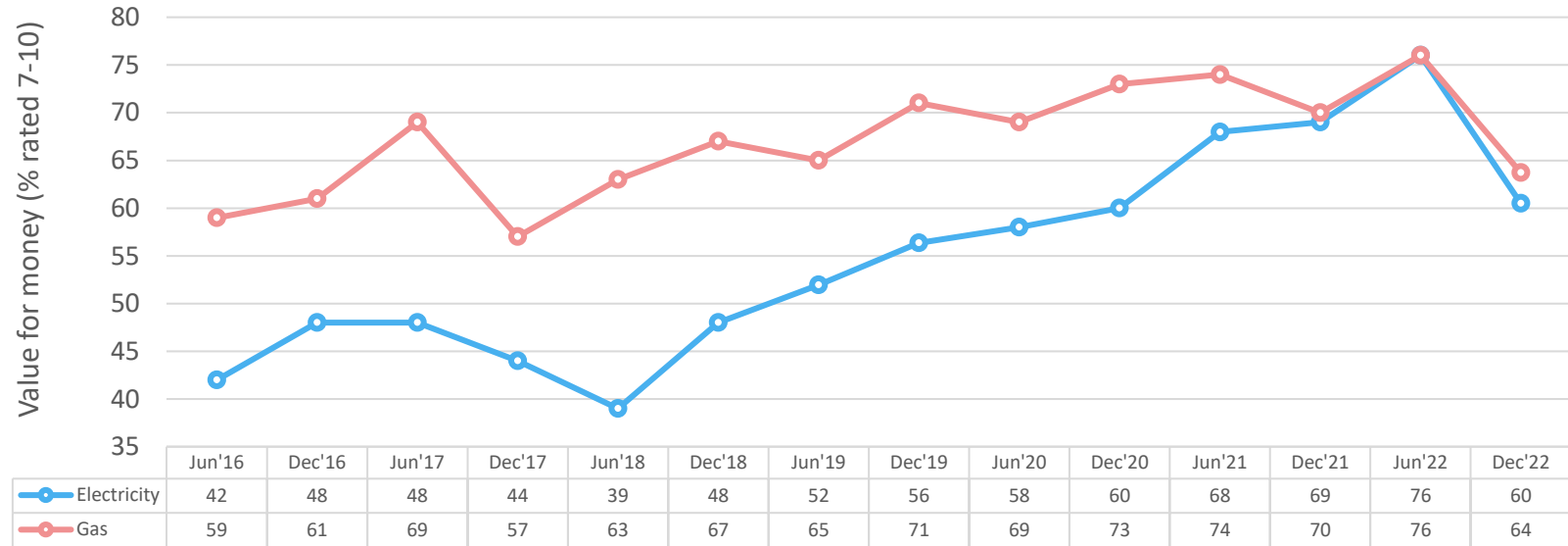
Base size: All businesses with a mains gas supply (min. n=266)

Value for money & Outages

- There have been year-on-year decreases in the perceived value for money of electricity and gas (down 9% and 6% points respectively). Electricity is now at 60% (down from 69% last year) and gas is now at 64% (down from 70% last year).
- 32% of small businesses have been affected by electricity outages in the last 6 months (up from 27% last year).
- Of those who have experienced an outage, 54% were satisfied with the the time it took to restore power (up 5% points from last year) and 49% were satisfied with the communication they received from the electricity supplier during the outages (up 8% points)



Value for money



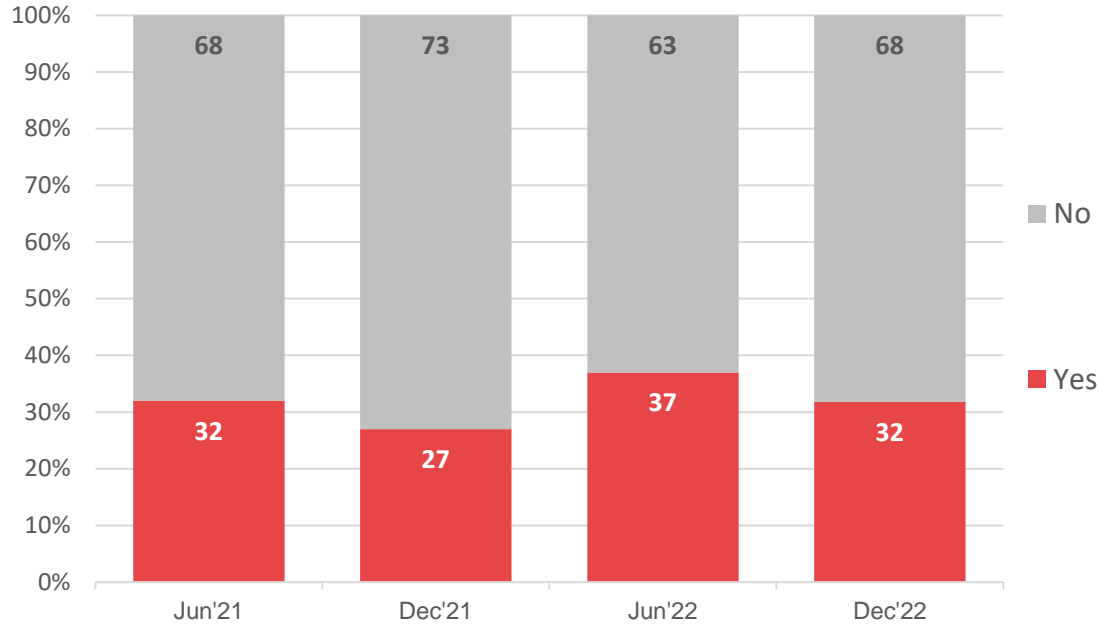
Q: How would you rate the overall value for money of the products and services provided by your electricity company in the past 6 months?

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

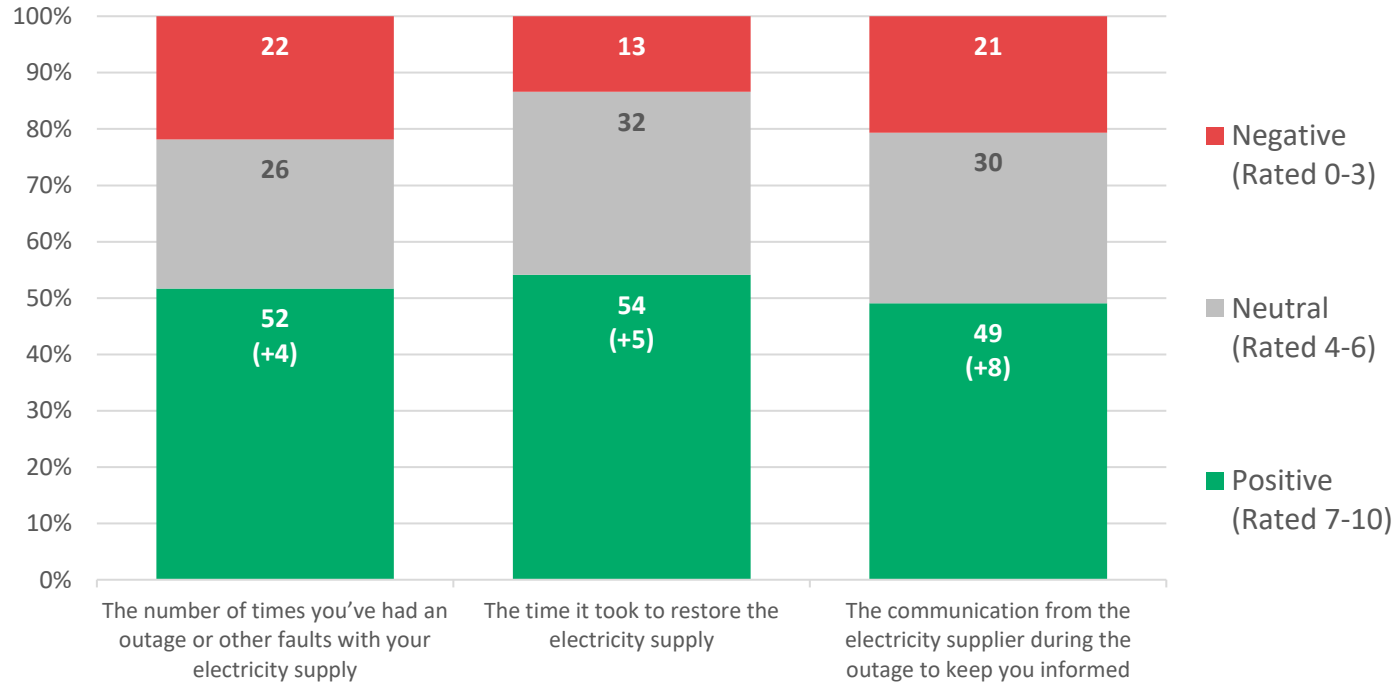
Q: How would you rate the overall value for money of the products and services provided by your gas retailer in the past 6 months?

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?

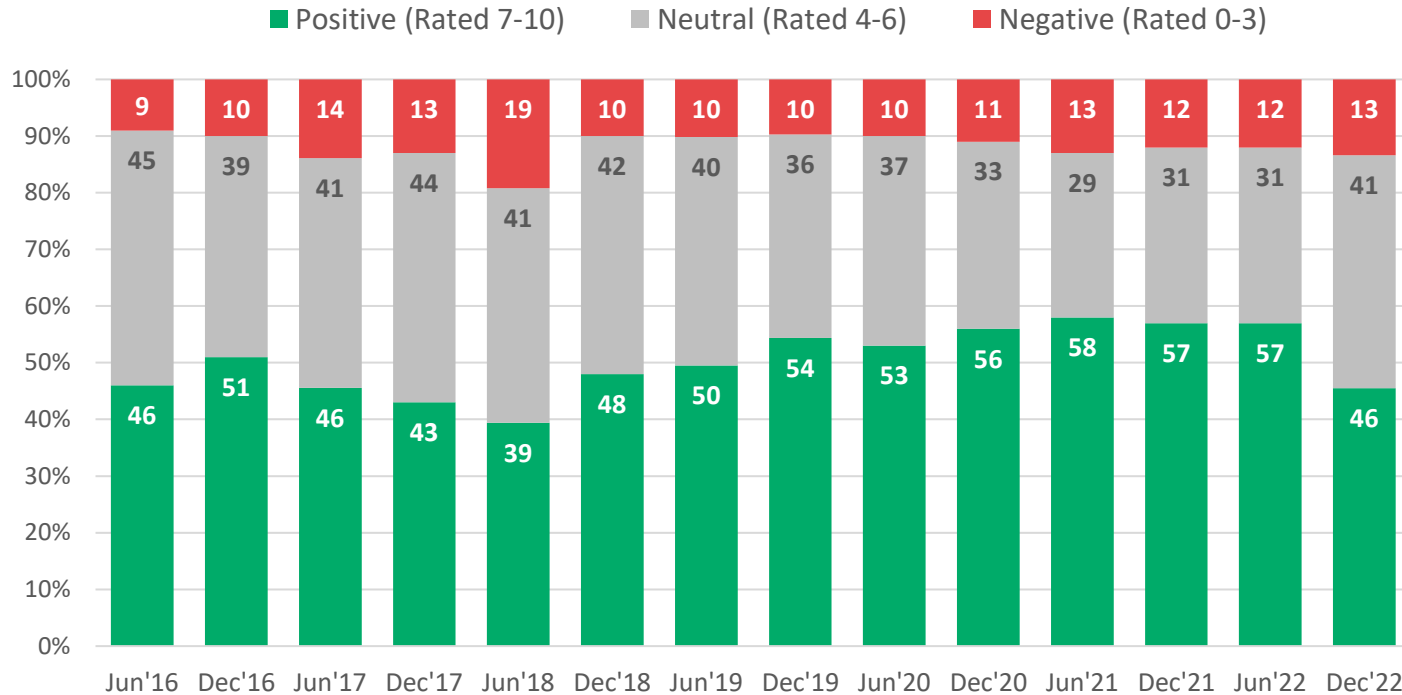
Base size: All businesses who have experienced an outage in the last 6 months (min. n=166)

Business Confidence

- Small business confidence has decreased across all measures in the past year, particularly in advances in technology and the overall market (down 11% and 8% points respectively).
- 46% of small businesses are confident in advances in technology, down from 57% last year, the lowest it has been in over four years (39% June 2018).
- 43% of small businesses are confident in the overall market, down from 51% last year, the lowest it has been in three years (41% December 2019).
- There have also been slight decreases in confidence over the last year for the availability of information (down 3% points), tools (down 2% points) and the ability to make choices (down 2% points).



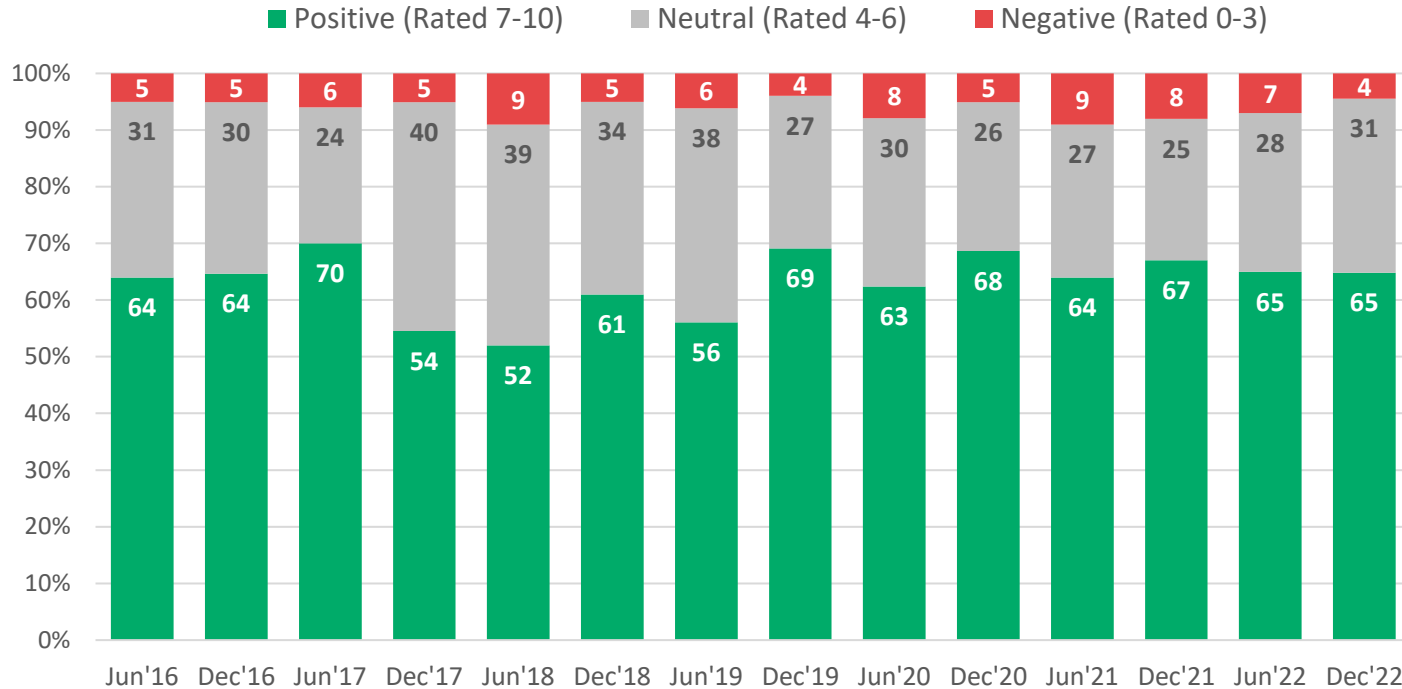
Confidence in advances in technology



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)

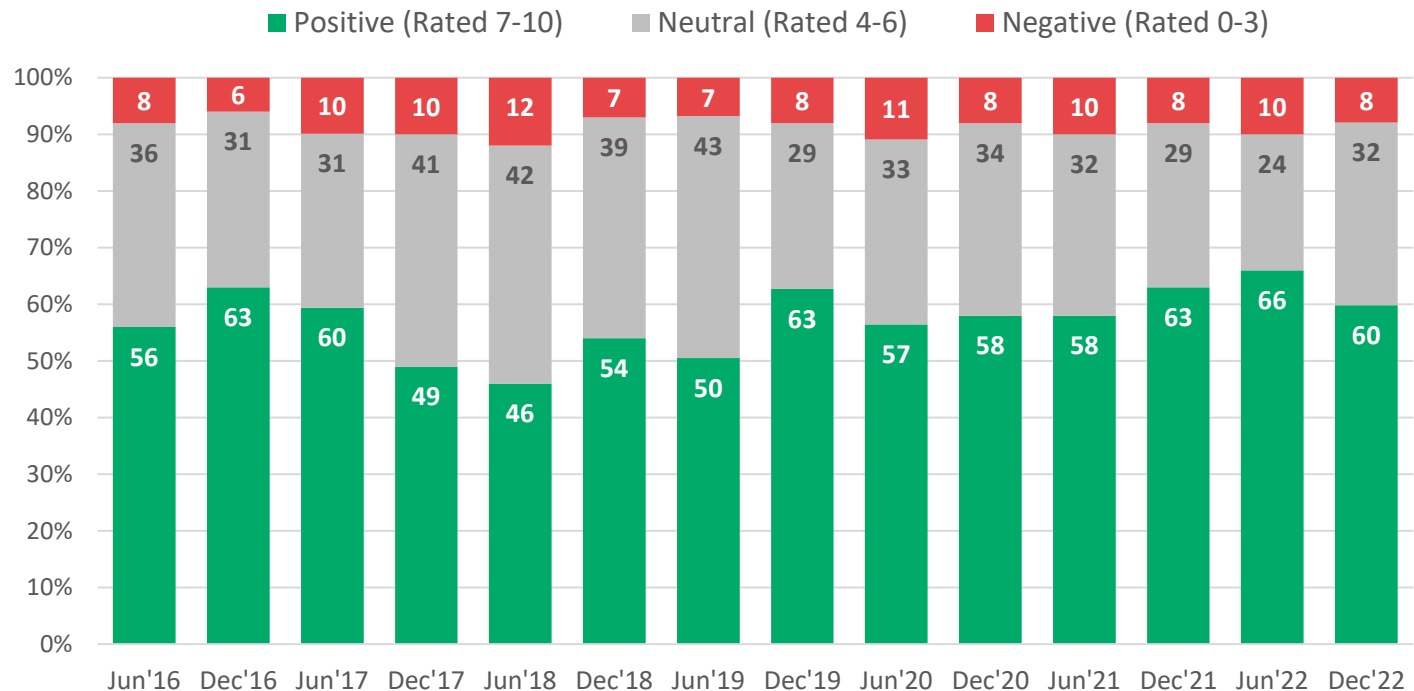
Confidence in ability to make choices



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 businesses (min. n=280)

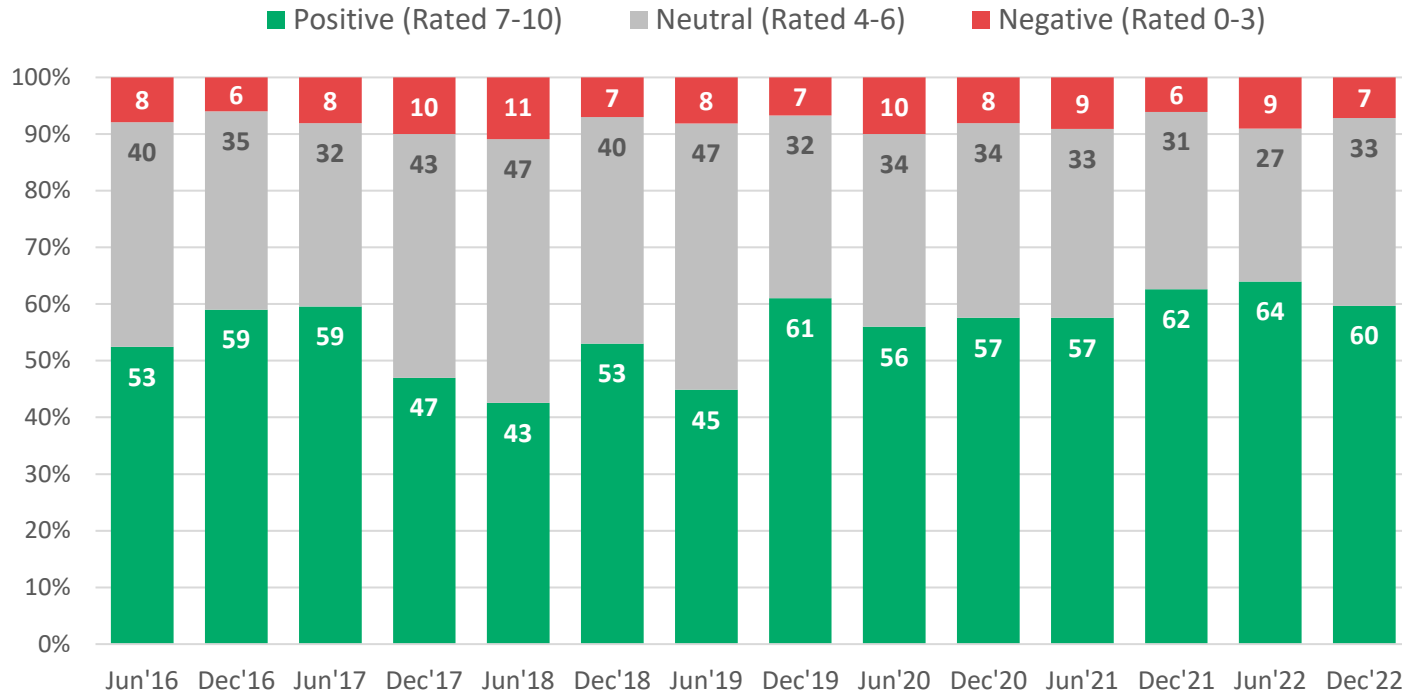
Confidence in availability of enough easily understood information



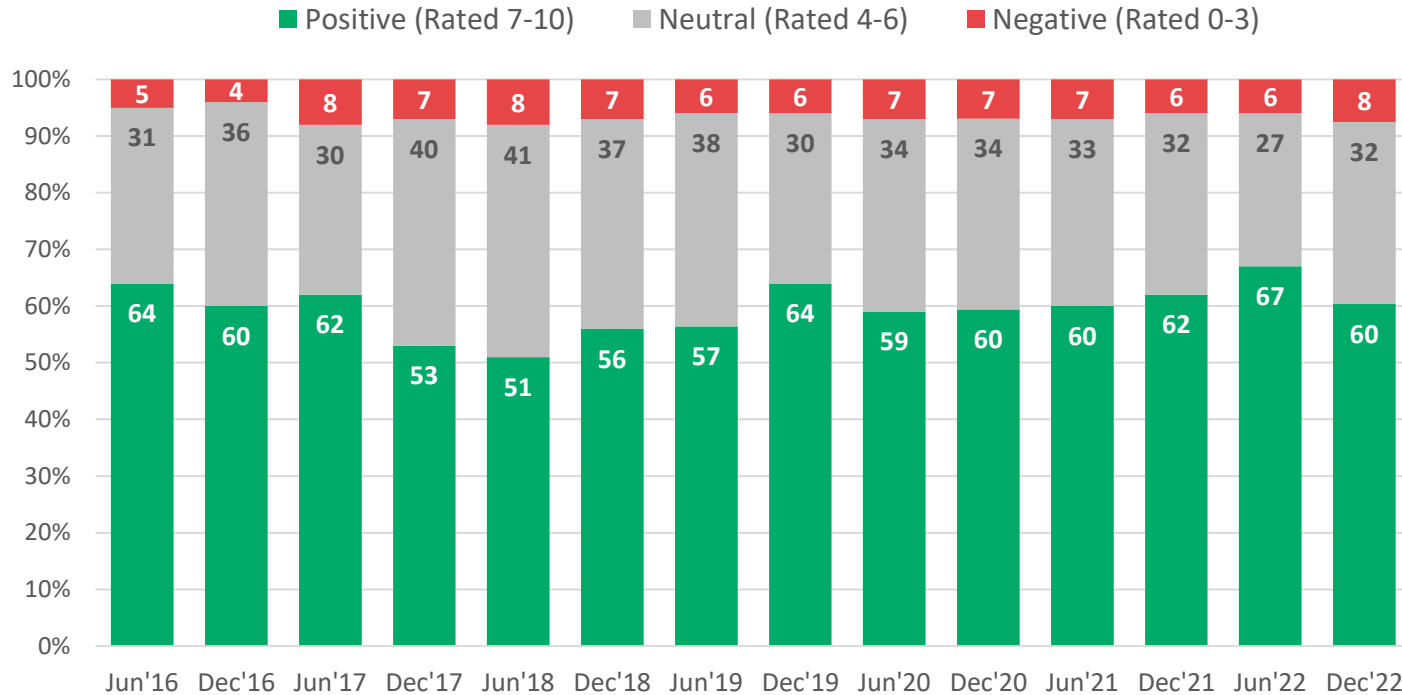
Q: How confident do you feel in the following...? **That there is enough easily understood information available to you to make decisions about energy products and services, by which we mean information available on the internet, through energy comparison websites or elsewhere**

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

Confidence in availability of tools



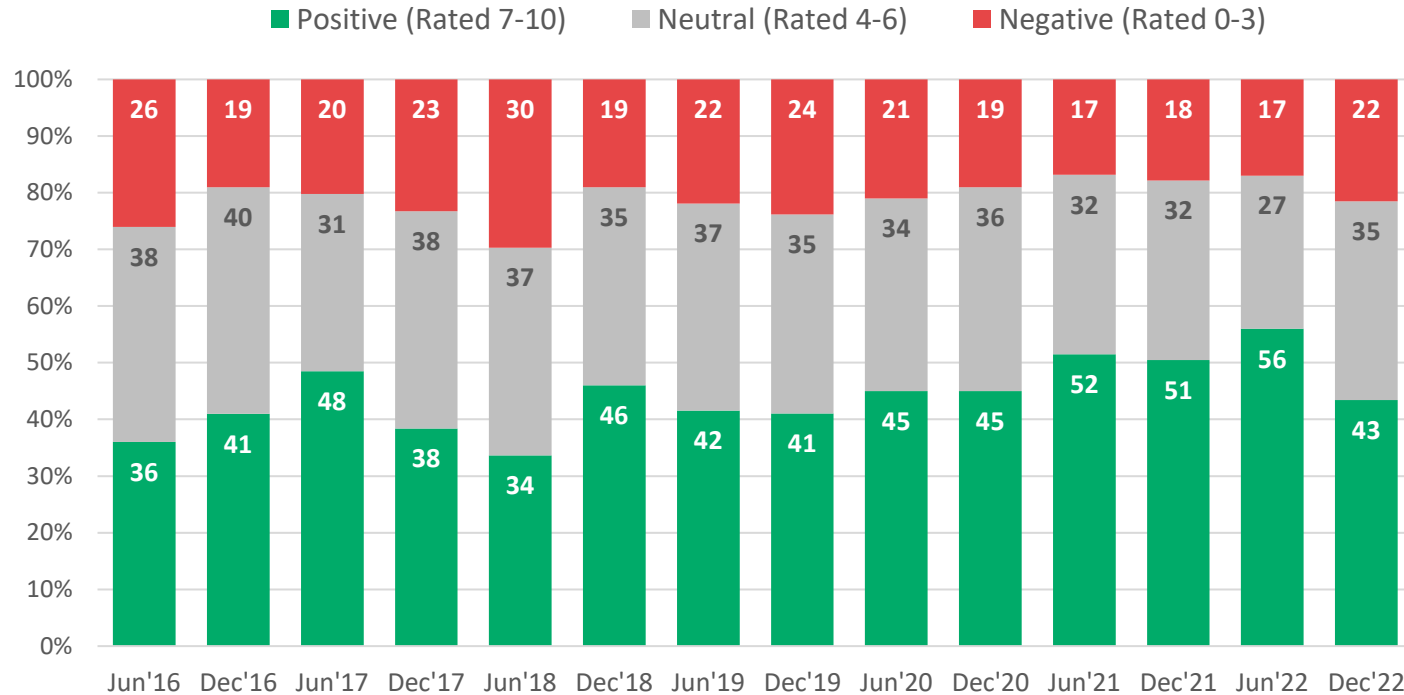
Confidence to get problems resolved



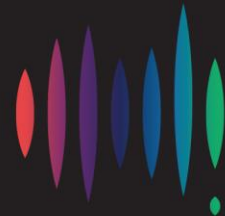
Q: How confident do you feel in the following...? **Your ability to get a problem with your energy services resolved through your energy company or a third party**

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

Confidence in the market



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 businesses (min. n=280)



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