

# ENERGY CONSUMER SENTIMENT SURVEY

Household topline results  
June 2023



# Key findings

For the second time in a row, the overall provision of service for electricity and gas remain stable, despite a significant decrease in the satisfaction of cost for both. The perceived value for money of electricity and gas decline as costs increase and households are becoming less confident that advances in technology will help reduce prices, and the overall energy market is working in the best interests of consumers.

Nationally, 83% of households are satisfied with their electricity services (rated 7-10 out of 10) – consistent with this time last year (80%). Satisfaction has increased in WA (83%, up from 75%) and Victoria (86%, up from 81%).

Satisfaction with the provision of gas services is now at 82% (80% last year).

Households are now less satisfied with the cost of their electricity service (43%, down from 53%). There have also been decreases in satisfaction for the assistance to manage electricity bills (57%, down from 61%).

The decrease in satisfaction for cost of electricity service has been driven by households in NSW (44%, down from 57%), VIC (44%, down from 58%), QLD (43%, down from 53%) and SA (39%, down from 52%).

Satisfaction with the cost of mains gas supply had the greatest decrease (48%, down from 60%), followed by assistance to manage bills (60%, down

from 67%) and communication from gas supplier (60%, down from 66%).

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 64% (70% last year). This is greater than any of the other utilities.

Households are increasingly becoming more concerned about future outcomes, with lower confidence in external factors, such as the benefits of technology and future energy reliability.

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 41% (down from 52% last year) and confidence that the energy market can provide a more reliable supply has decreased from to 44% (down from 53% last year).

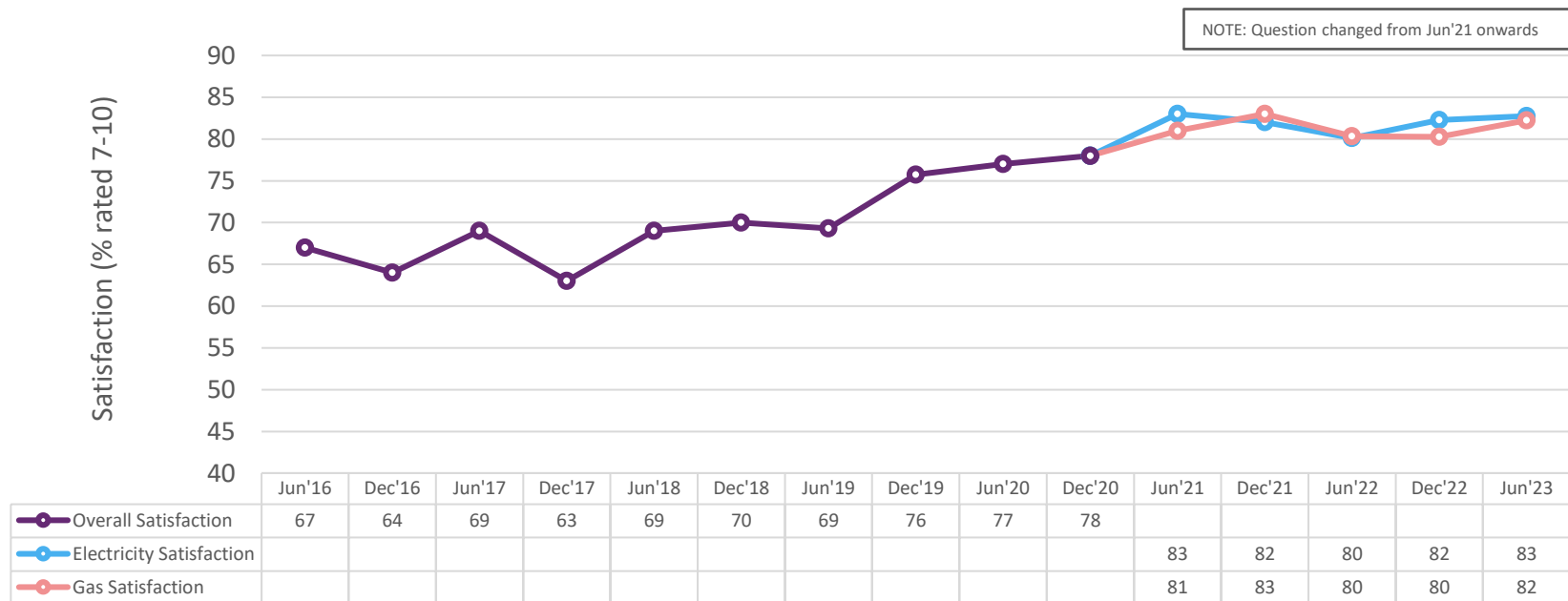
Confidence that the market is working in consumers' best interests is now at 35% (down from 44%), and down in all states except WA.

# Satisfaction

- Household satisfaction with electricity service has remained unchanged from last year (83%, 80% in June 2022), however satisfaction with cost of electricity supply has decreased to 43% (53% in June 2022). Other elements of electricity services remain unchanged.
- For households with a gas supply, satisfaction with the provision of their gas service has remained unchanged (82%, 80% in June 2022), however satisfaction with cost of gas has decreased from 60% to 48% over the year.
- Households with gas are also less satisfied with the support to manage their gas bills (60, 67% last year) and the communication from their gas retailer (60, 66% last year).



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

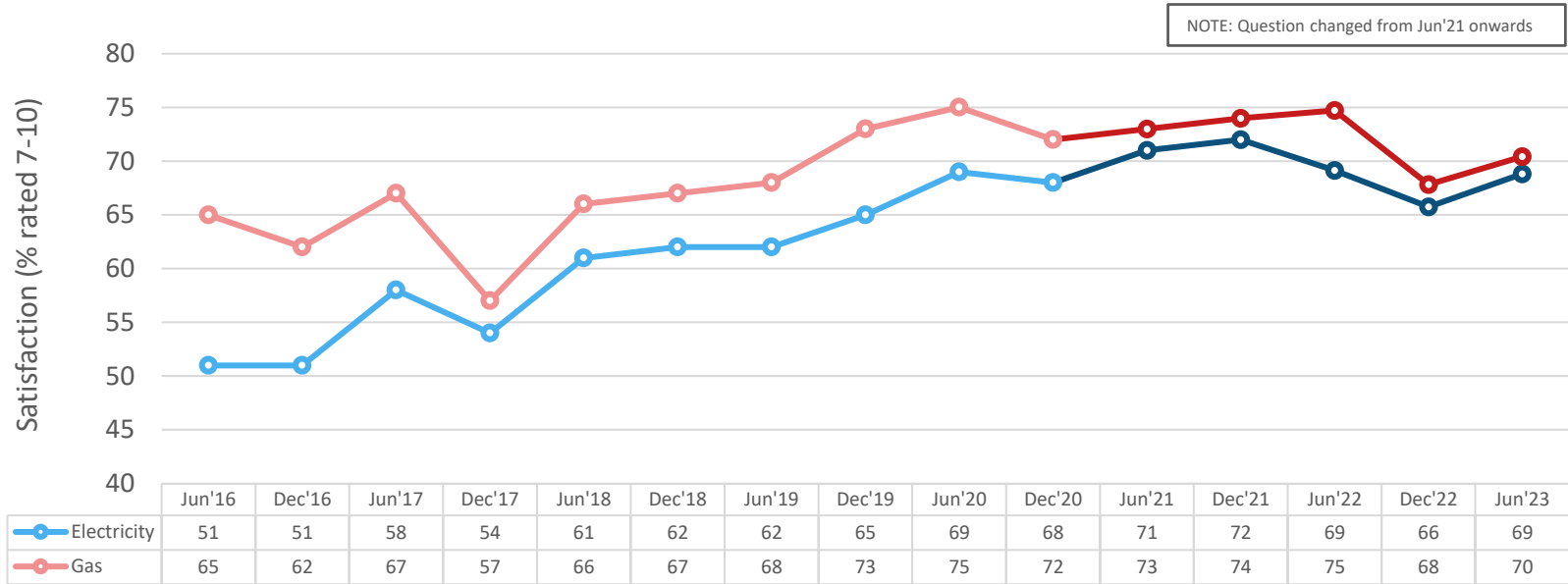


Q (Jun'16-Dec'20): How satisfied are you with the following? **The provision of your electricity and gas services overall over the last 6 months**, Base size: All households (min. n=2,000)

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= 1,161)

# 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)

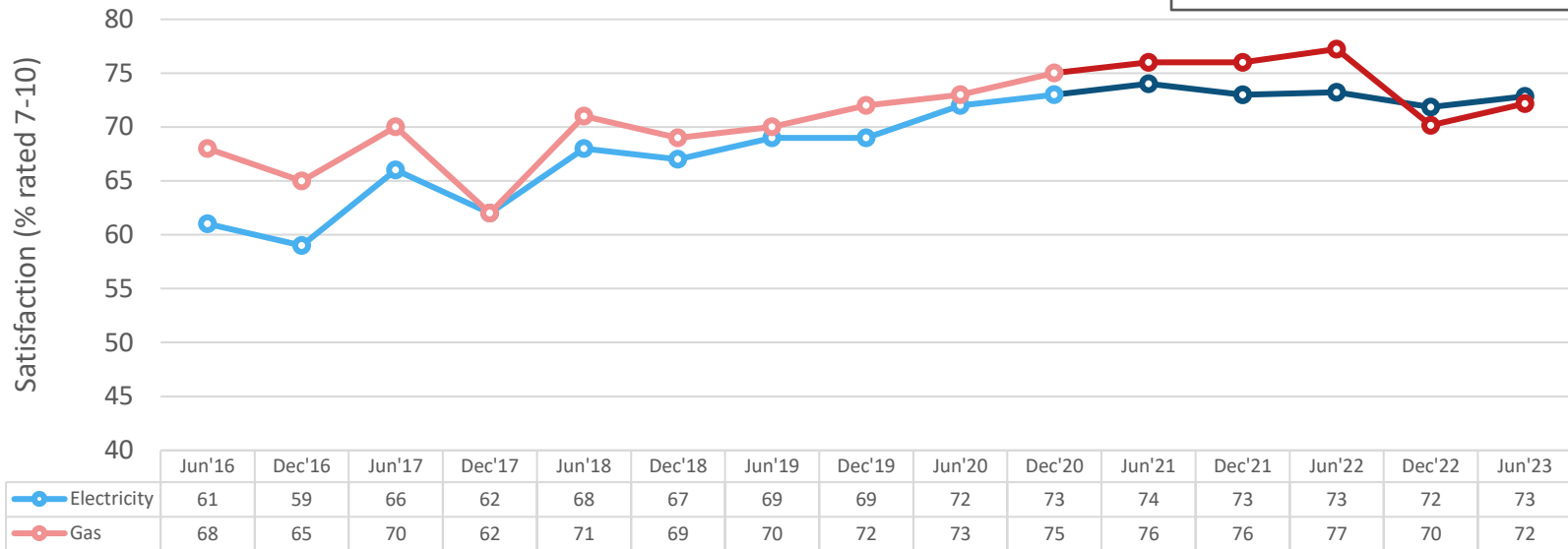
Q (from Jun'21): How satisfied are you with the following aspects of your electricity retailer in the past 6 months? **Overall customer service**, Base size: All households (min. n= 2,120)

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= 1,161)

# Satisfaction with retailer measures: Billing

NOTE: Question changed from Jun'21 onwards



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)

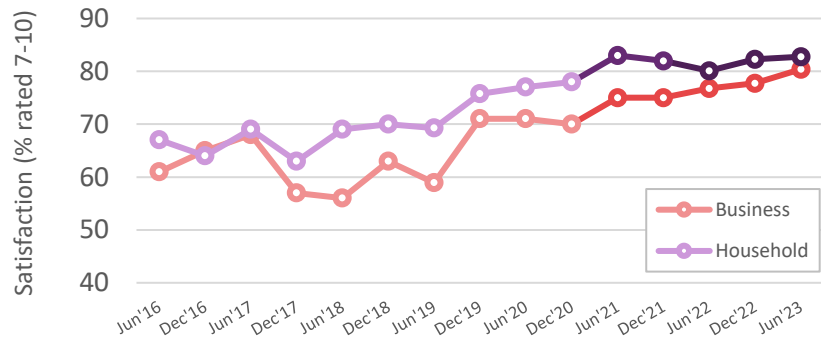
Q (from Jun'21): How satisfied are you with the following aspects of your electricity retailer in the past 6 months? **Billing and usage information is clear and simple to understand**, Base size: All households (min. n= 2,120)

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)

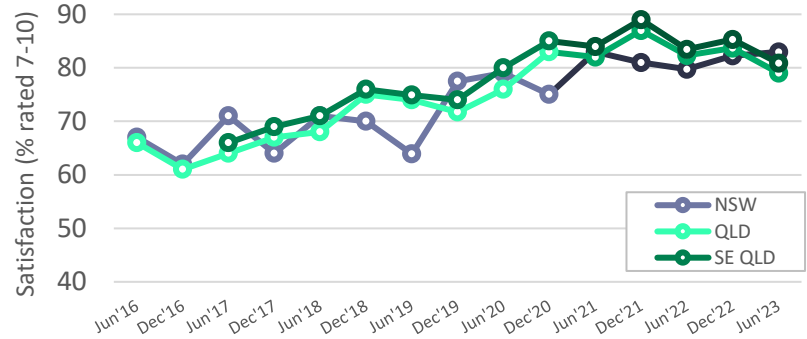
Q (from Jun'21): How satisfied are you with the following aspects of your gas retailer in the past 6 months? **Billing and usage information is clear and simple to understand**, Base size: All households with a mains gas supply (min. n= 1,161)

# Overall satisfaction with electricity services

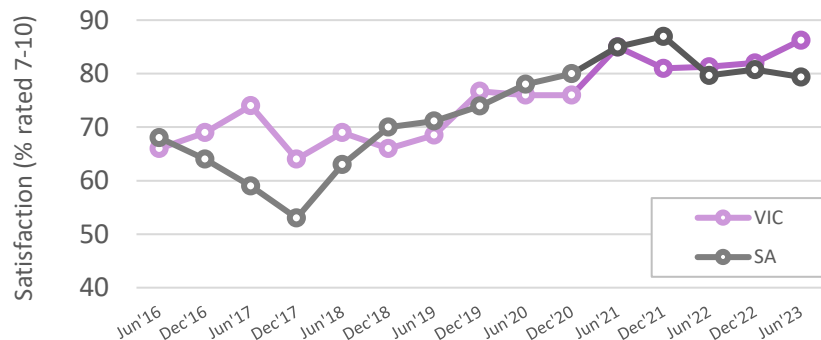
## Overall Satisfaction - Business & Household



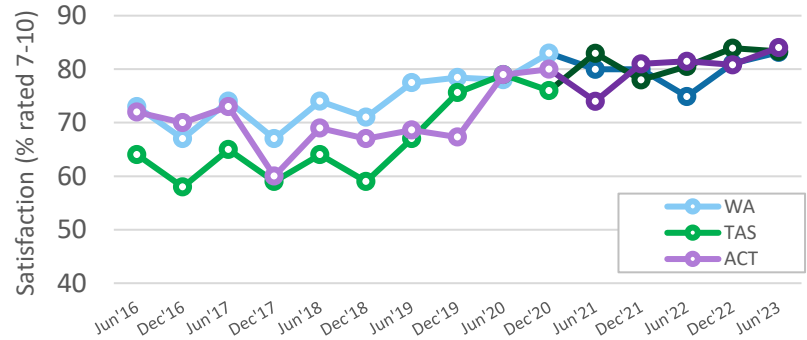
## Overall Satisfaction - NSW, QLD & SE QLD



## Overall Satisfaction - VIC & SA



## Overall Satisfaction - WA, TAS & ACT

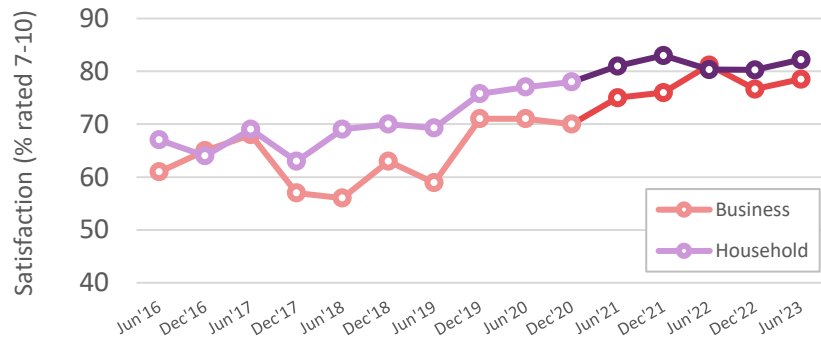


Q (Jun'16-Dec'20): How satisfied are you with the following? **The provision of your electricity and gas services overall over the last 6 months**, Base size: All households (min. n=2,000)

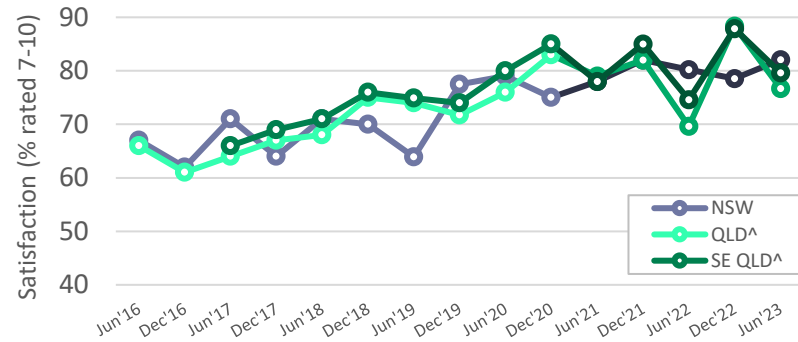
Q (from Jun'21): How satisfied are you with the following elements of your electricity service over the past 6 months? **The provision of your electricity services**, Base size: All households (min. n = 2,120)

# Overall satisfaction with gas services

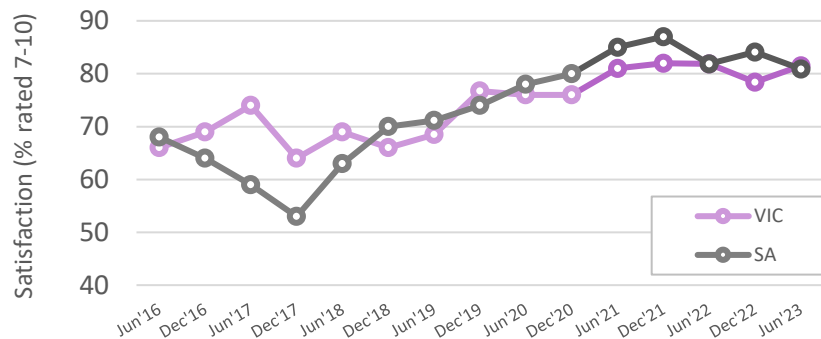
## Overall Satisfaction - Business & Household



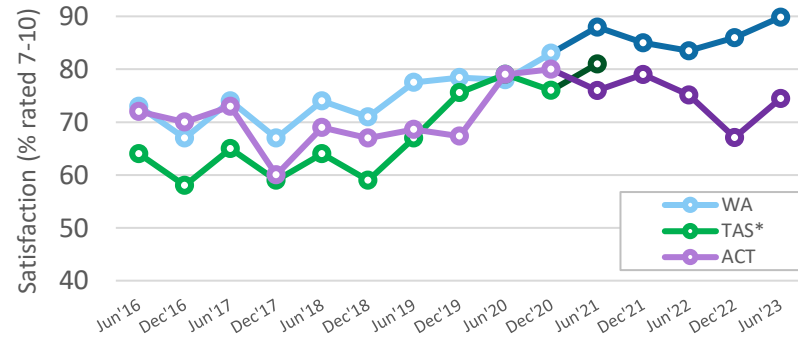
## Overall Satisfaction - NSW, QLD^ & SE QLD^



## Overall Satisfaction - VIC & SA



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



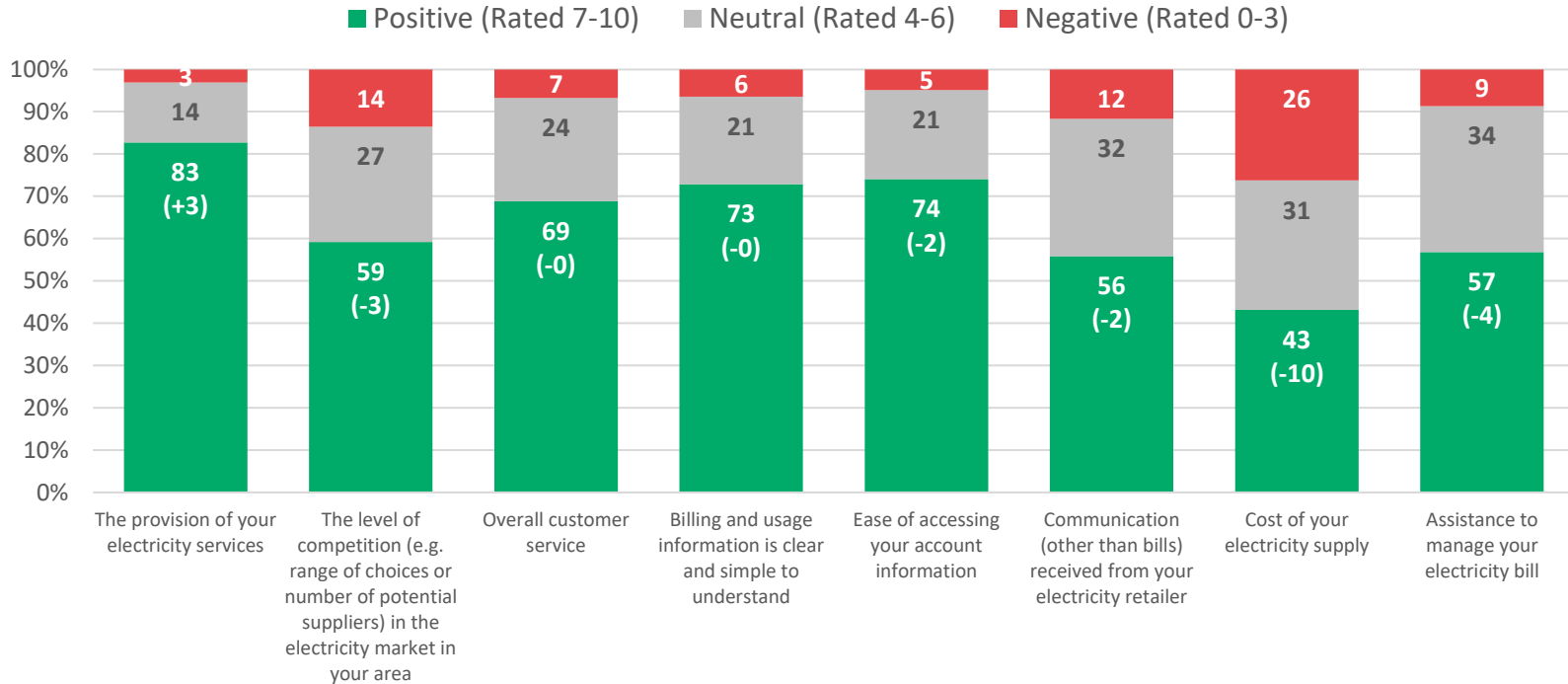
Q (Jun'16-Dec'20): How satisfied are you with the following? **The provision of your electricity and gas services overall over the last 6 months**, Base size: All households (min. n=2,000)

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= 1,161)

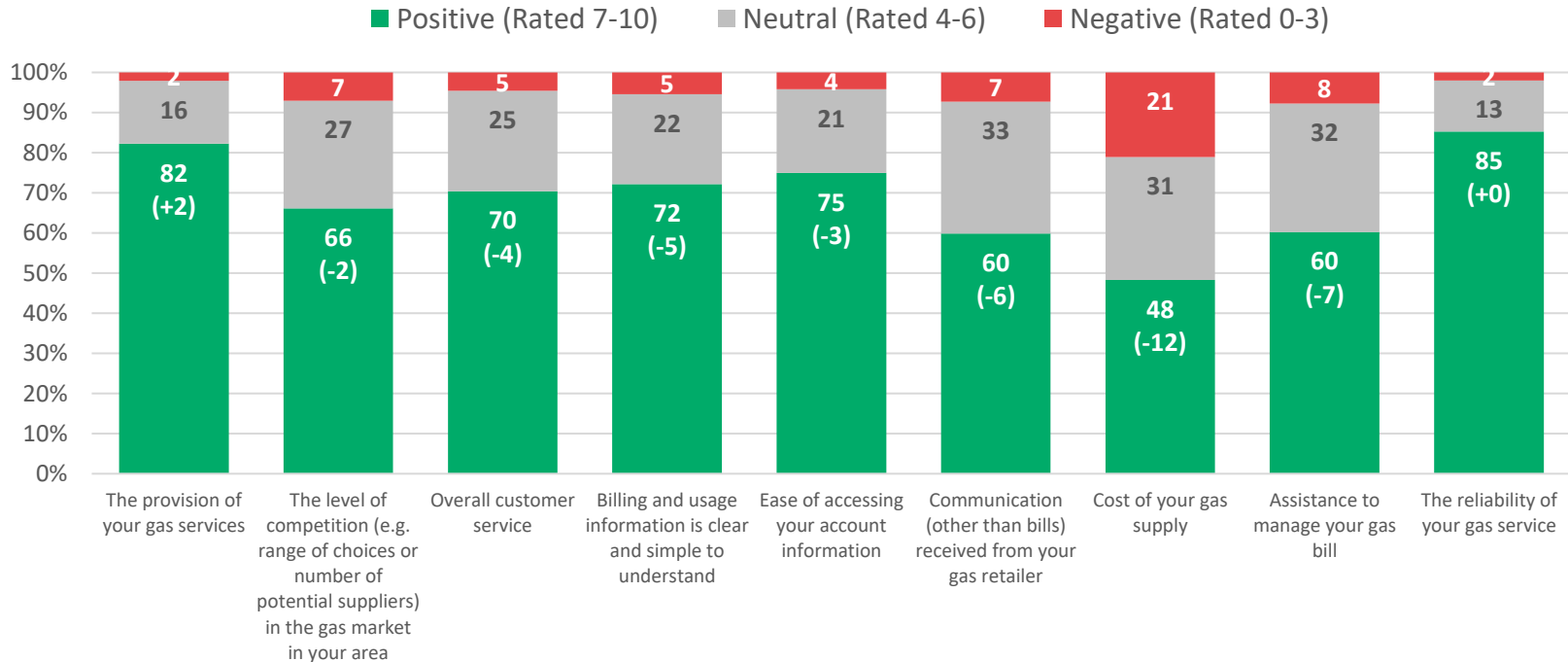
^Caution small sample size for QLD & SE QLD. \*Results not shown for TAS Dec'21, Jun'22, Dec'22 & Jun'23 due to extremely small sample size (n<30).



# Satisfaction with retailer measures: Electricity



# Satisfaction with retailer measures: Gas

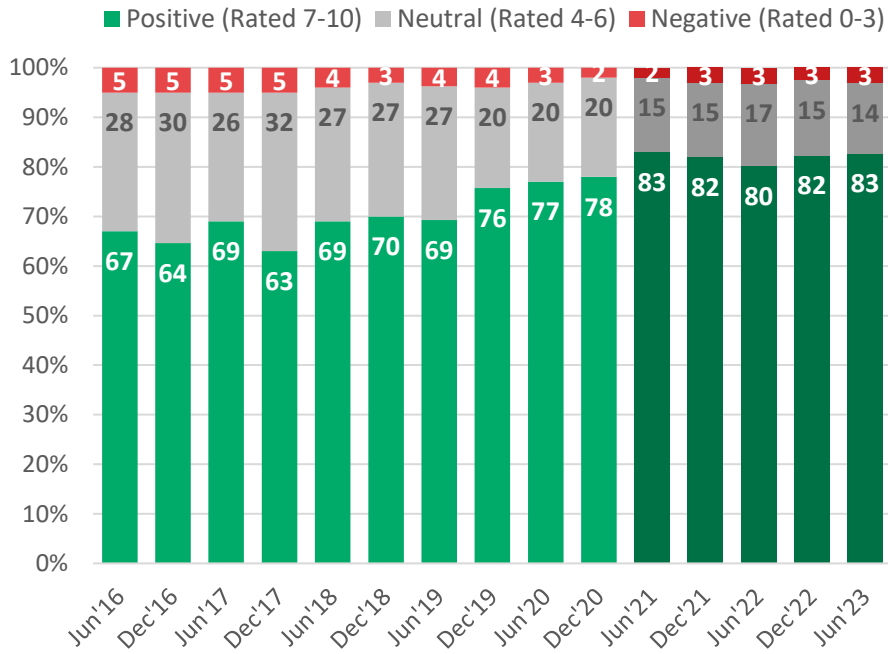


Q (Jun'16-Dec'20): How satisfied are you with the following? Base size: All households with a mains gas supply (min. n=1,000)

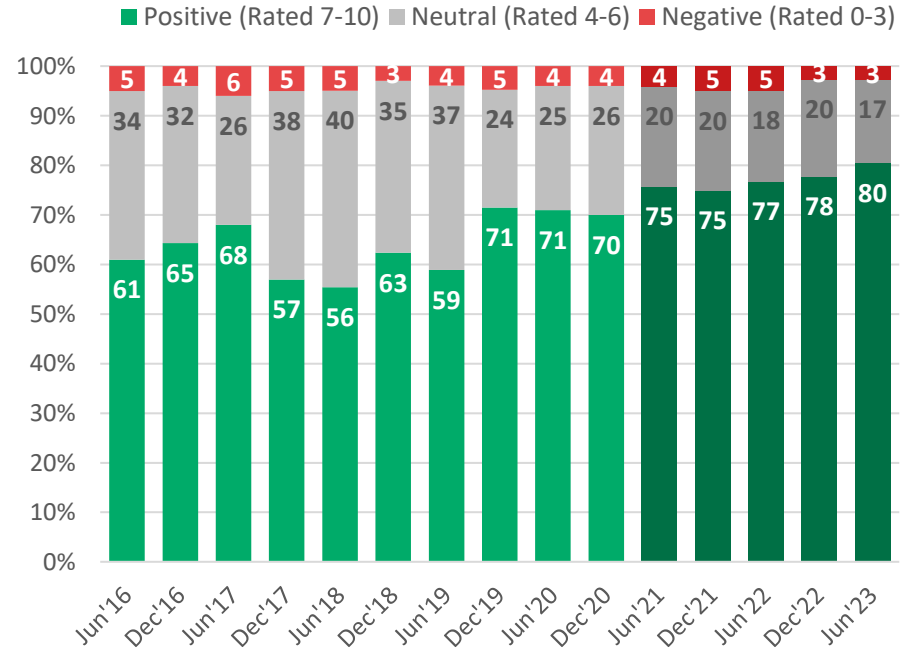
Q (from Jun'21): How satisfied are you with the following elements of your gas service over the past 6 months? Base size: All households with a mains gas supply (min. n=1,161)

# 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)

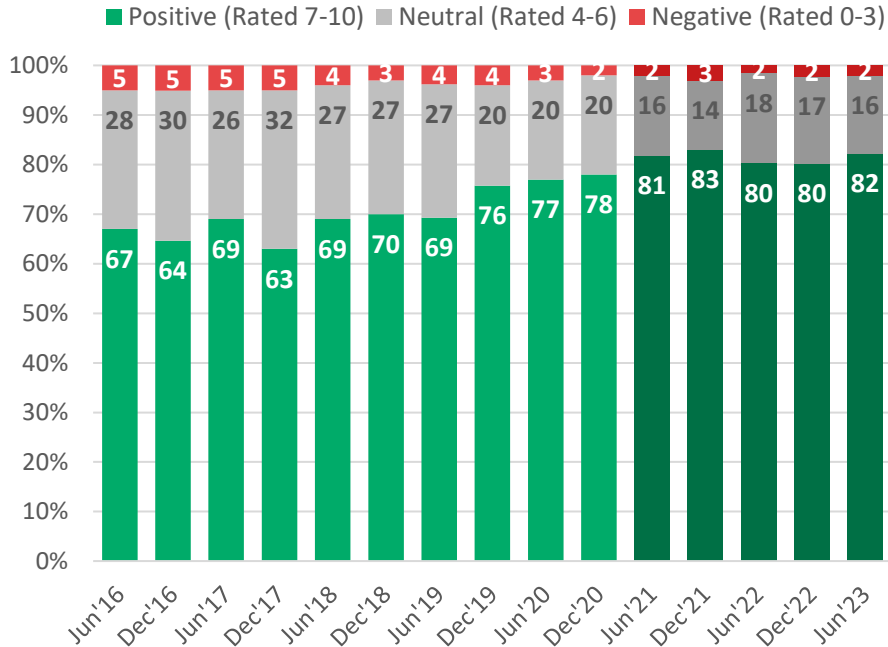
Q (from Jun'21): How satisfied are you with the following elements of your electricity service over the past 6 months? **The provision of your electricity services**, Base size: All households (min. n= 2,120)

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)

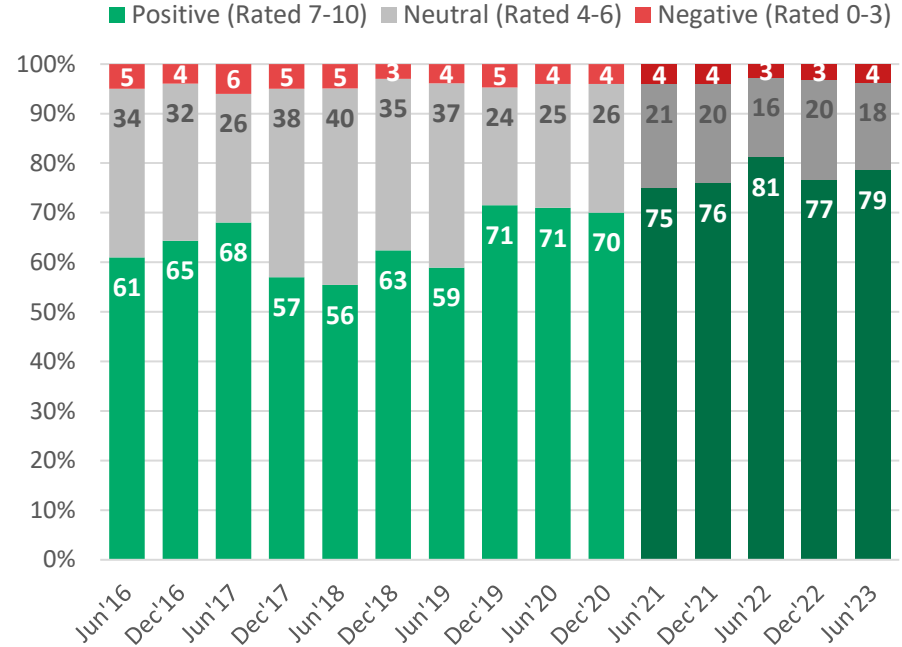
Q (from Jun'21): How satisfied are you with the following elements of your electricity service over the past 6 months? **The provision of your electricity services**, Base size: All businesses (min. n=500)

# Overall satisfaction with gas services (Business/Household)

## Overall Satisfaction - Household



## Overall Satisfaction - Business



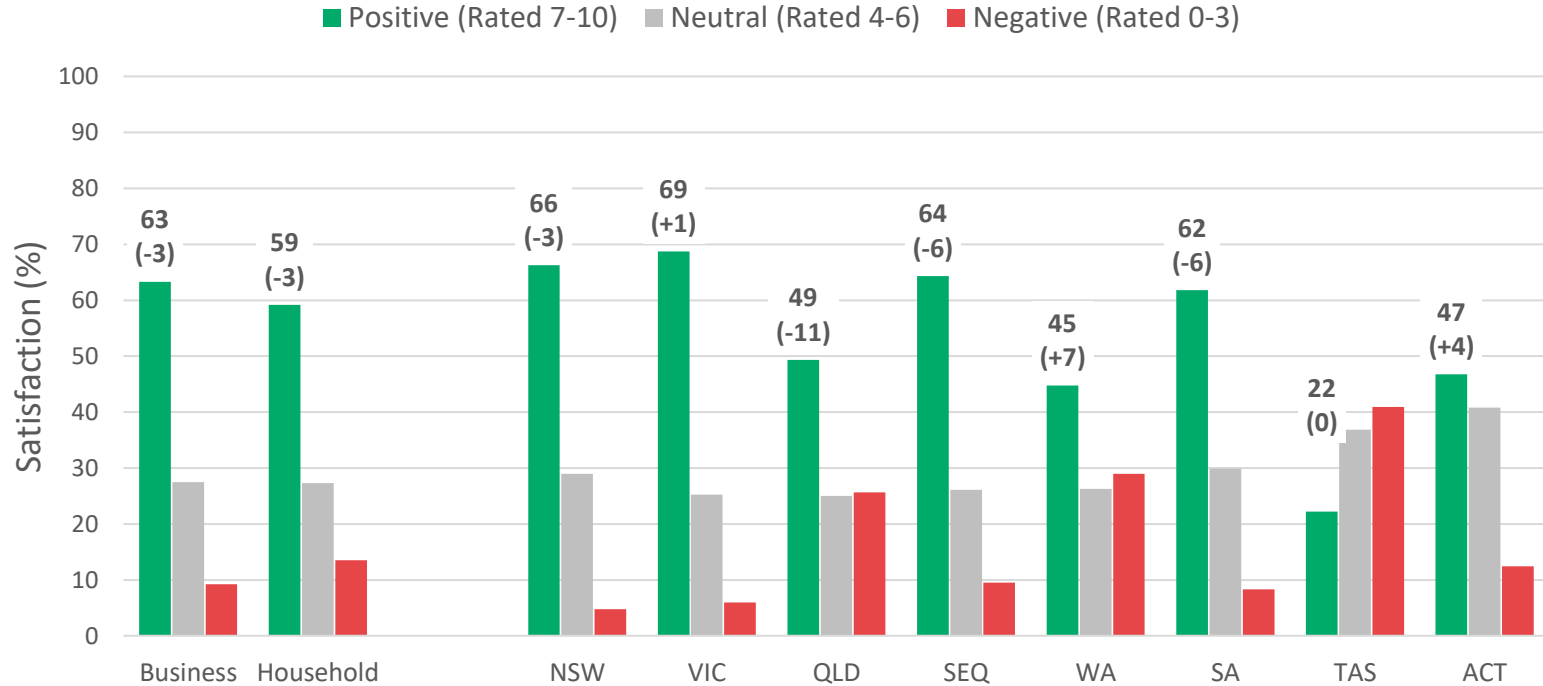
Q (Jun'16-Dec'20): How satisfied are you with the following? **The provision of your electricity and gas services overall over the last 6 months**, Base size: All households (min. n=2,000)

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= 1,161)

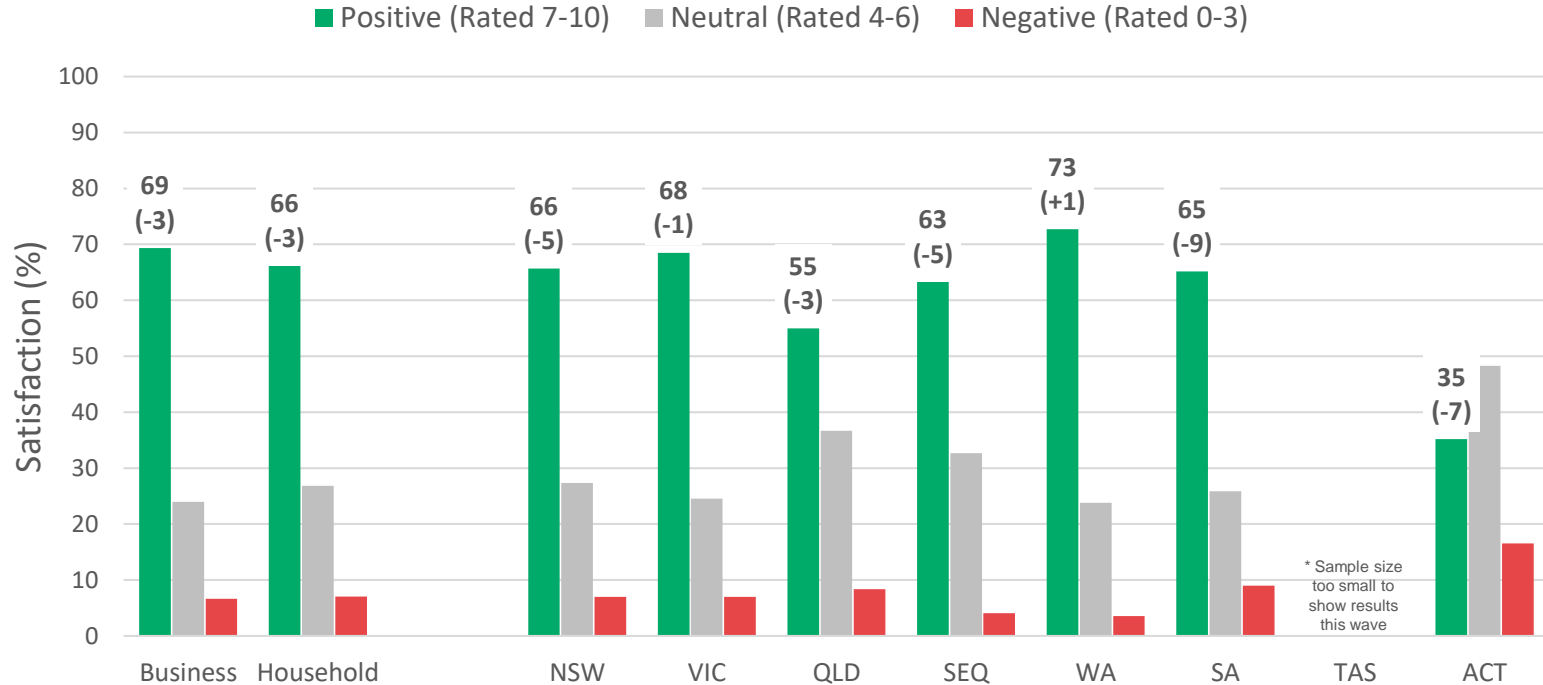
Q (Jun'16-Dec'20): How satisfied are you with the following? **The provision of your electricity and gas services overall over the last 6 months**, Base size: All businesses (min. n=280)

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

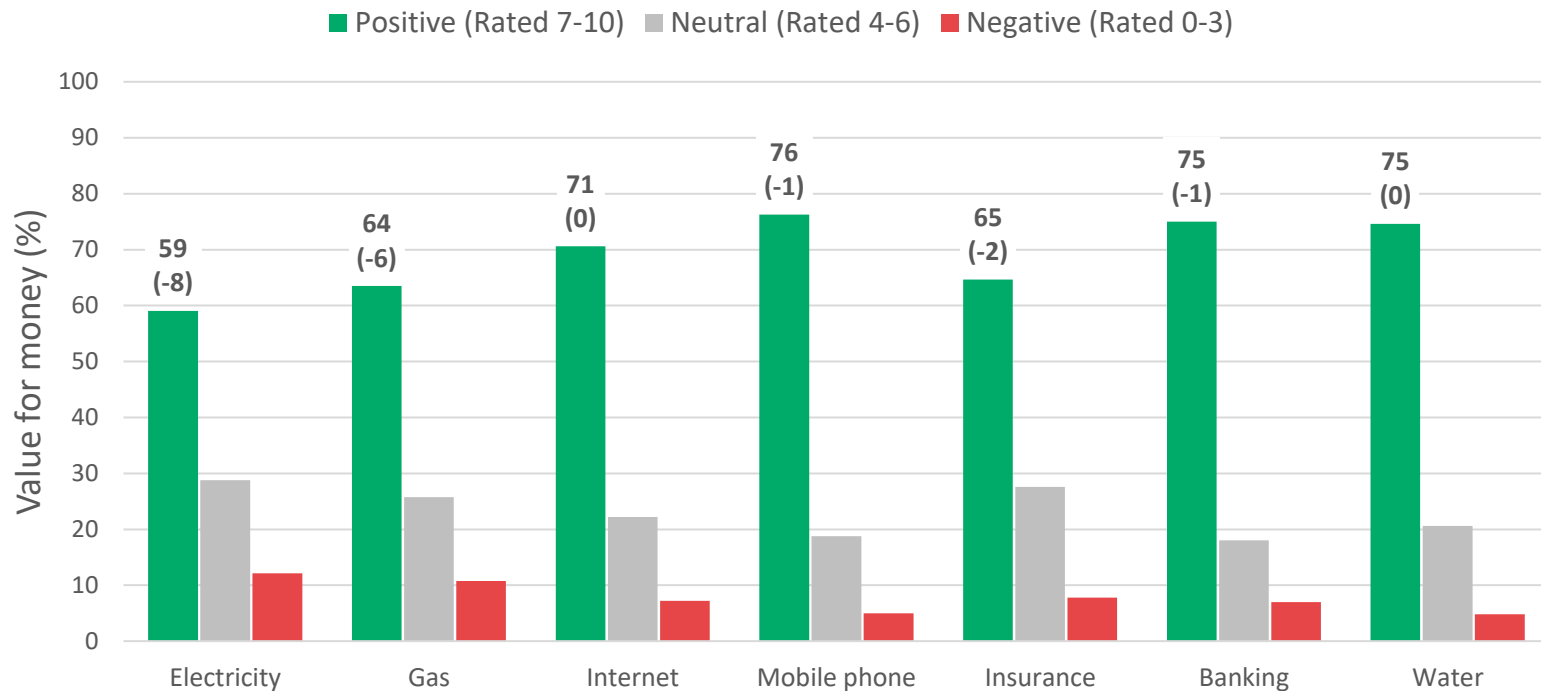


# Value for money & Outages

- There have been year-on-year decreases in the perceived value for money of electricity and gas (down 8% and 6% 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 64% (down from 70% last year).
- 35% of households have experienced an electricity outage in the last 6 months. This is consistent with June 2022 (36%).
- Among households who experienced an electrical outage, around half are positive about the frequency of the outages (49%) and the majority are positive about the time it took to restore power (59%).



# 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?

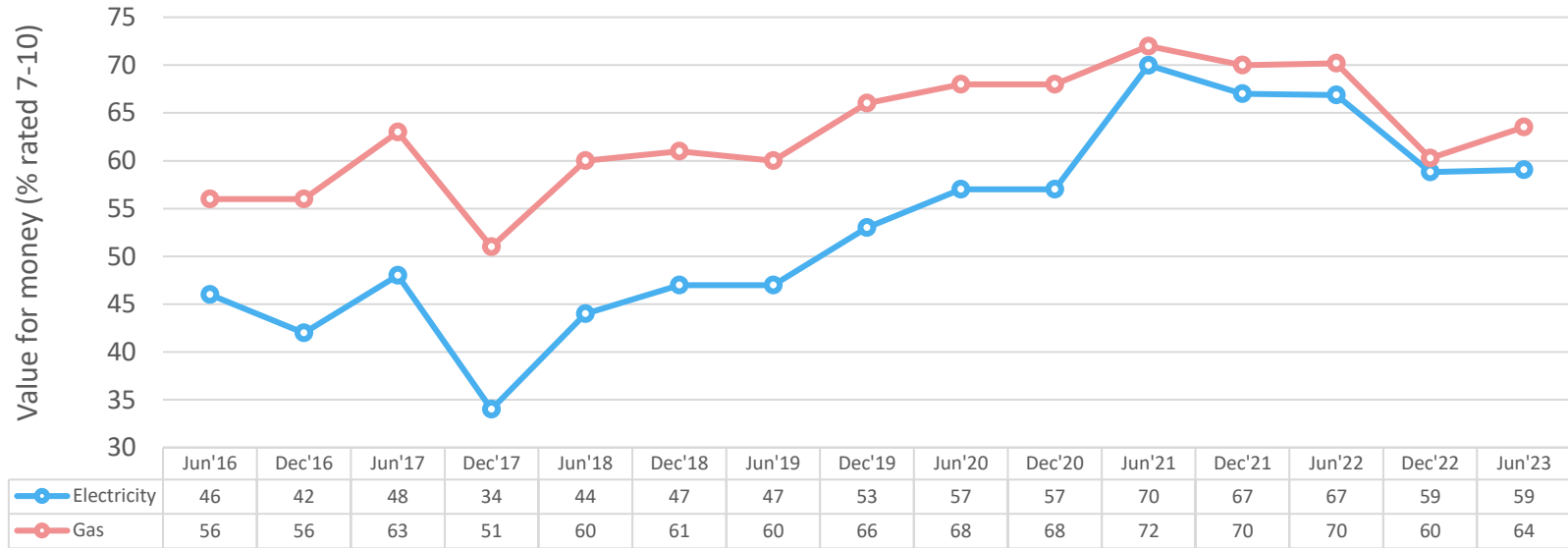
Base size: All households with a mains gas supply (min n=1,161)

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



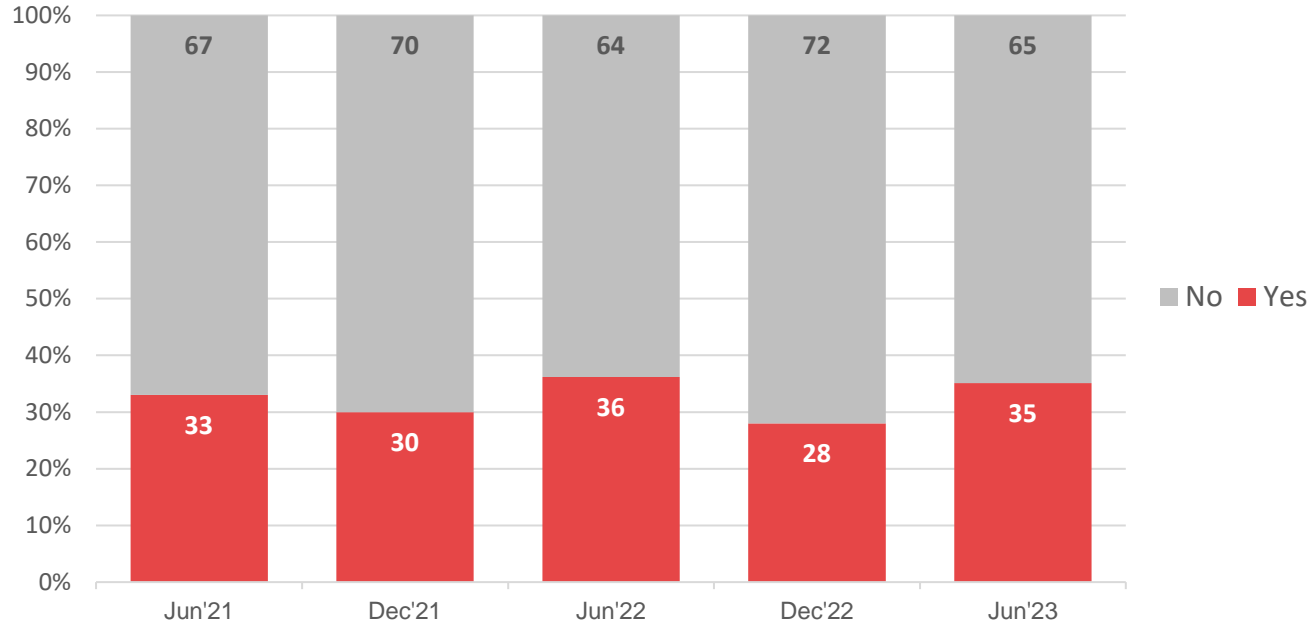
Q: How would you rate the overall value for money of the products and services provided by your electricity company in the past 6 months?

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

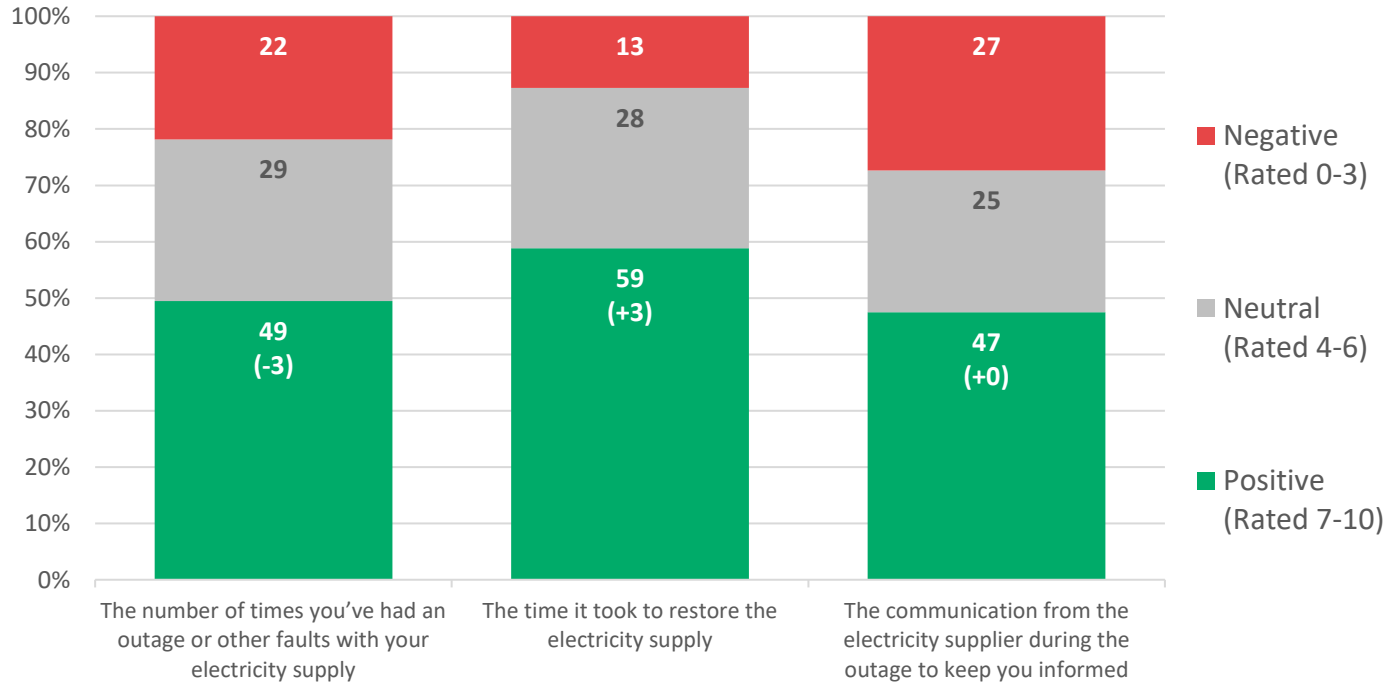
Q: How would you rate the overall value for money of the products and services provided by your gas retailer in the past 6 months?

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?

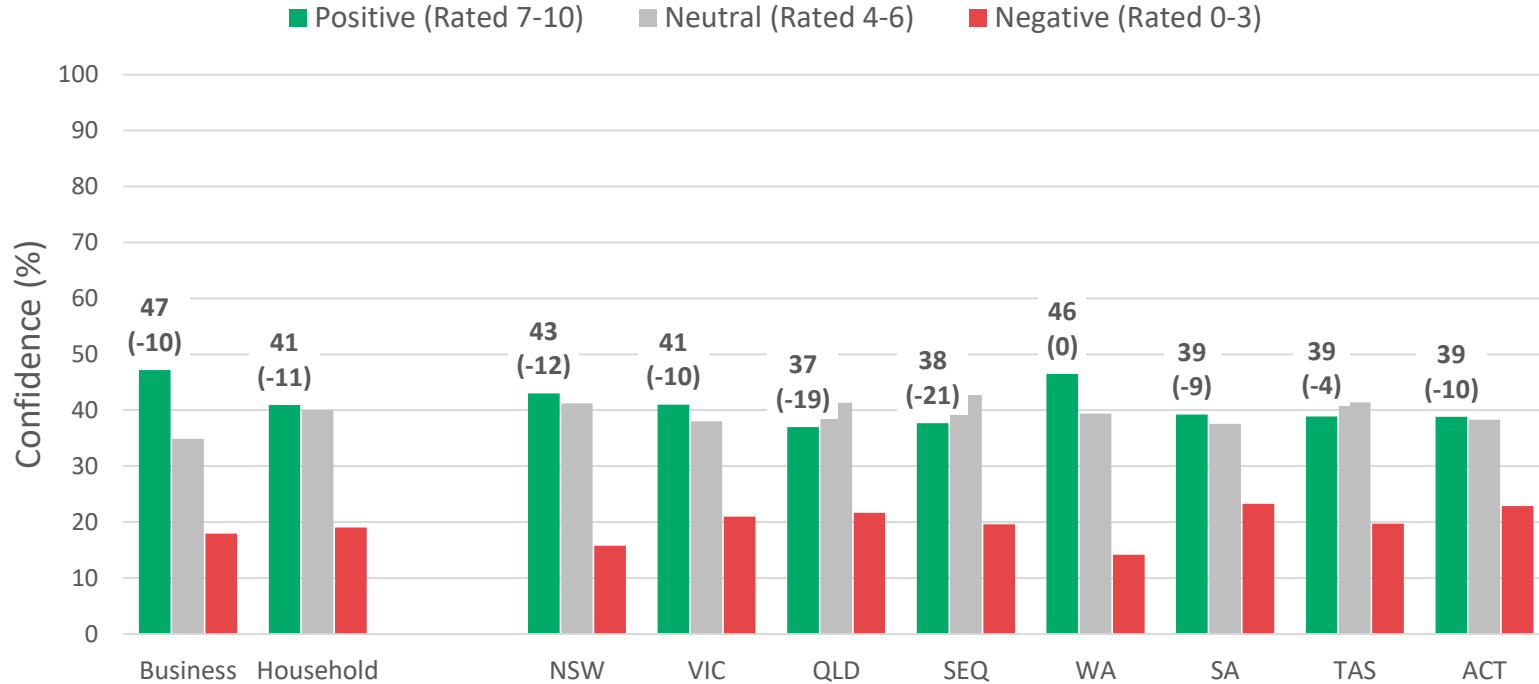
Base size: All households who have experienced an outage in the last 6 months (min n=676)

# Household confidence

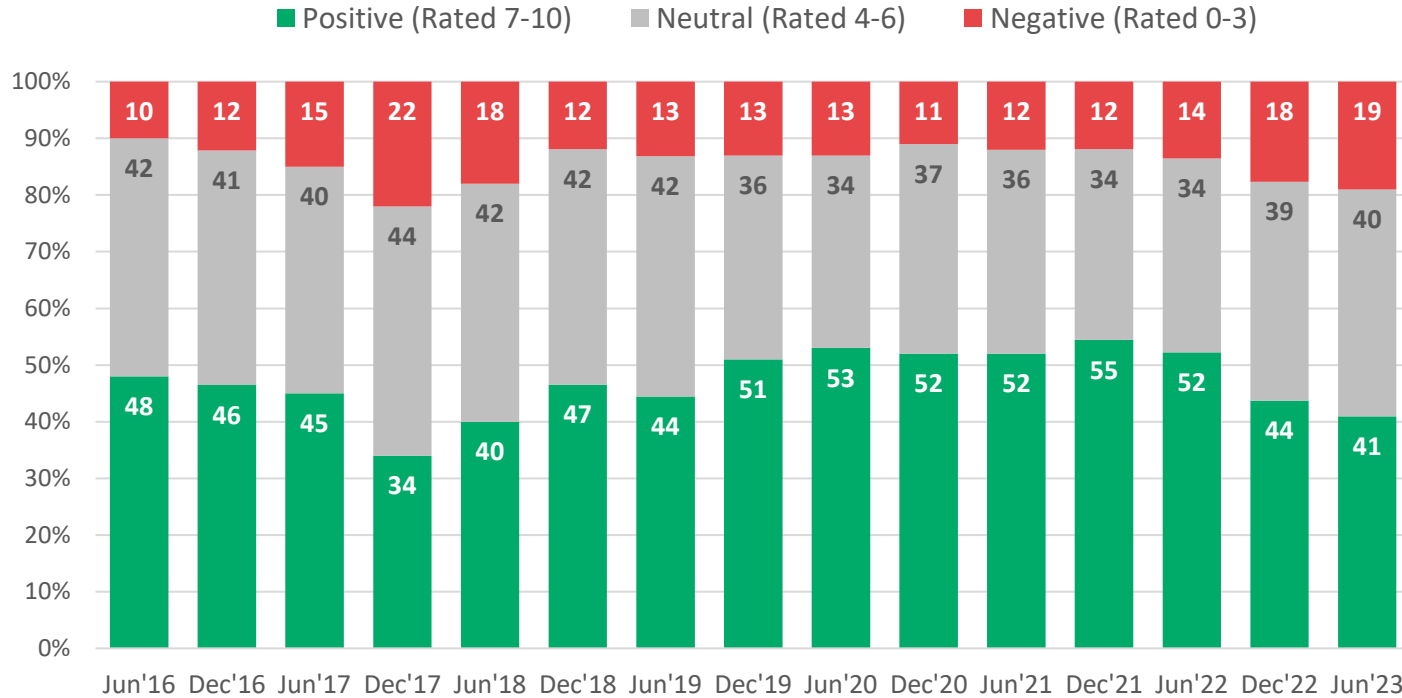
- Household confidence has decreased in the past year in advances in technology (down 11% points), future reliability (down 9% points), and that the market is working in your long-term interests (down 9% points).
- Households retain confidence in the availability of information, their ability to make choices about energy products and services, and having tools and assistance to manage energy use and costs
- Consistent with previous waves, around one-third of households are familiar with the Energy Ombudsman (31%).



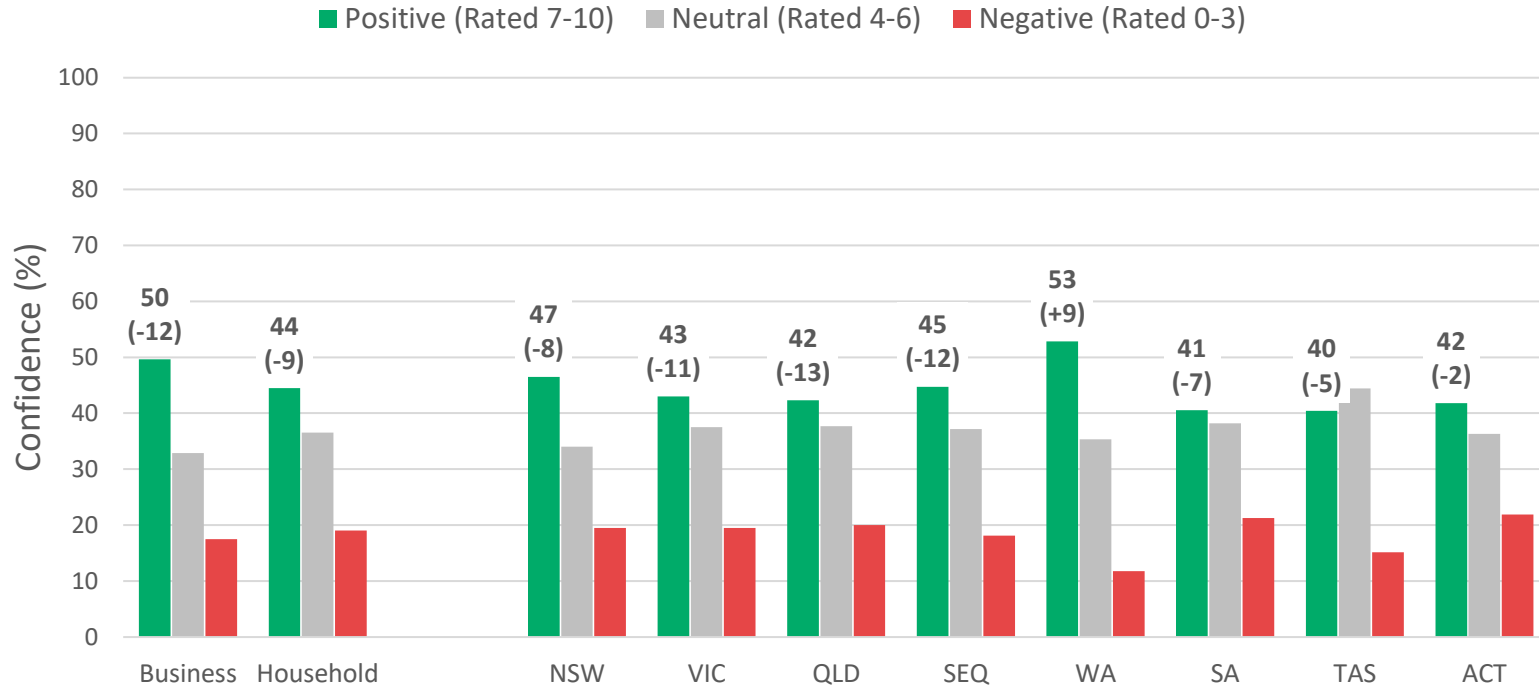
# Confidence in advances in technology



# Confidence in advances in technology



# Confidence in future reliability

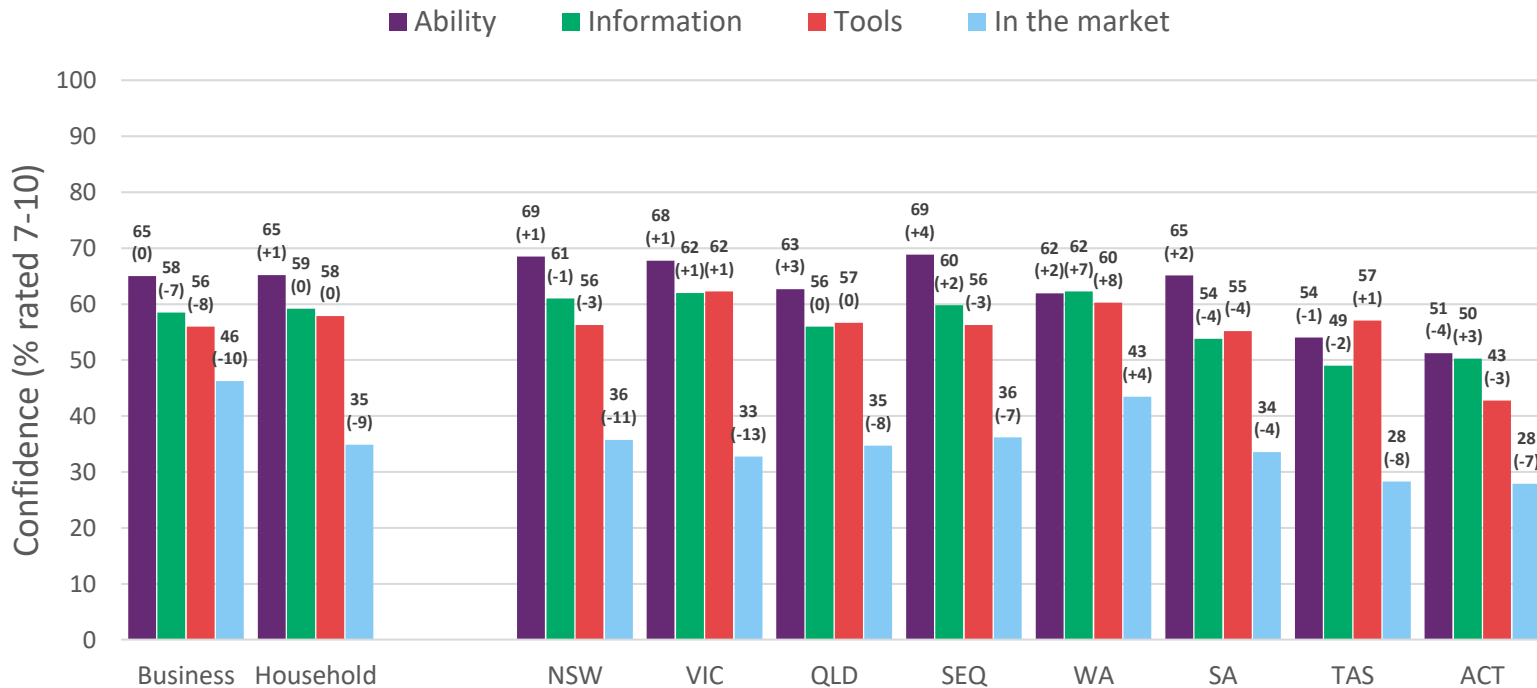


Q: Thinking about the overall market outcomes, how confident are you that the energy market will provide better outcomes for you in 5 years, in terms of...? **Provide a more reliable supply**

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**

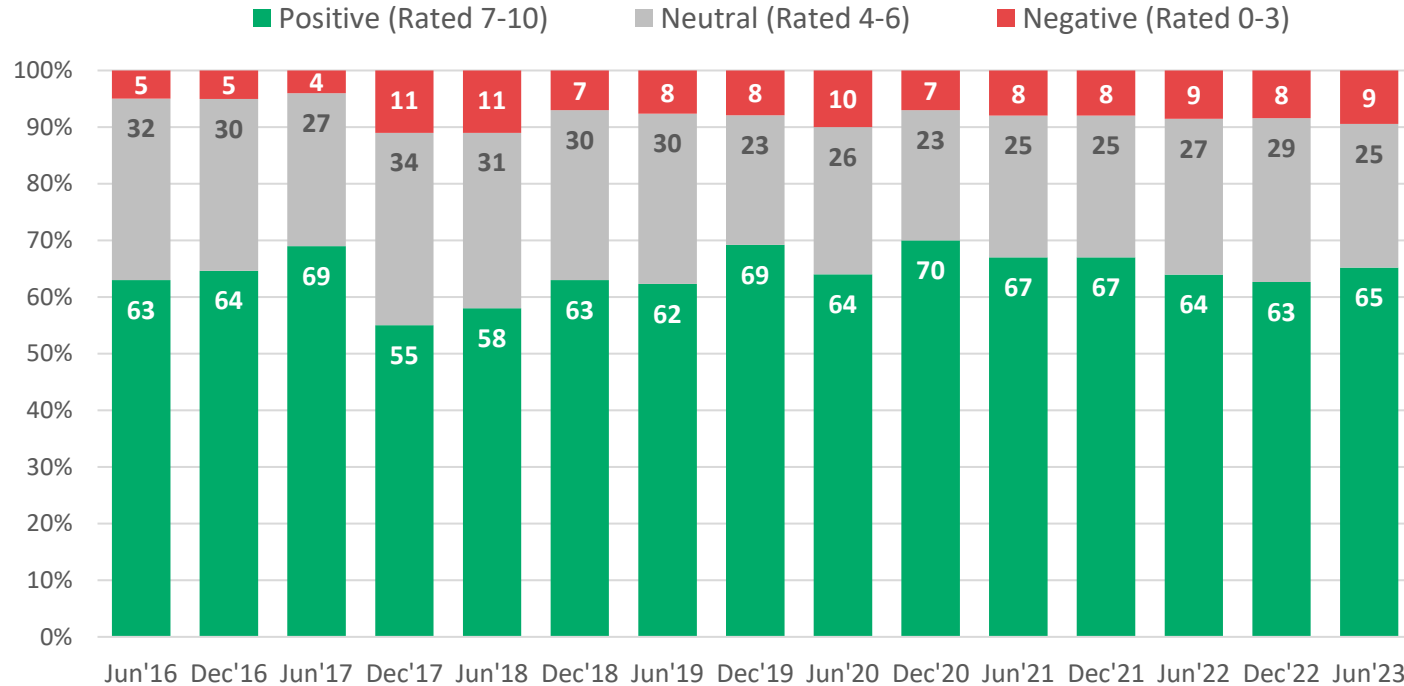
Q: How confident are you that the overall market is working in your long-term interests? By 'the market' we mean, the energy industry and energy regulators

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

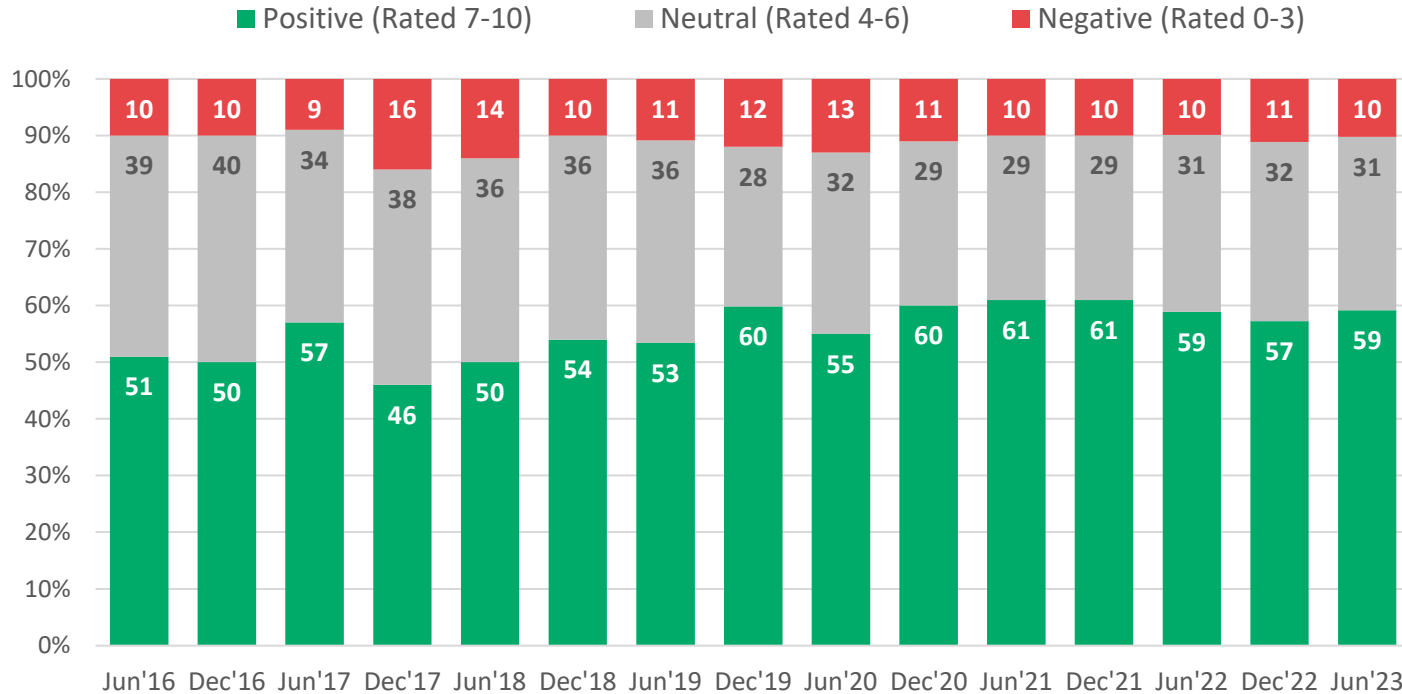
Base size: All businesses (min n=500)



# Confidence in ability to make choices



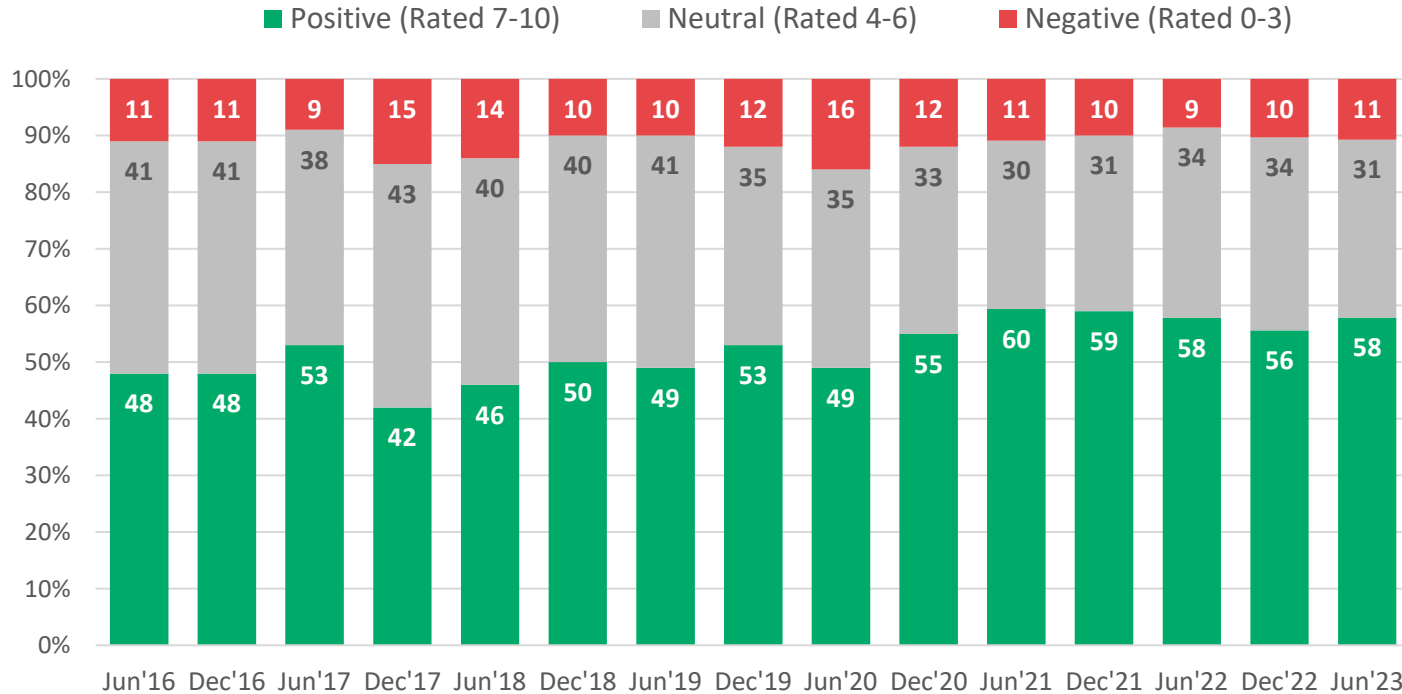
# Confidence in availability of enough easily understood information



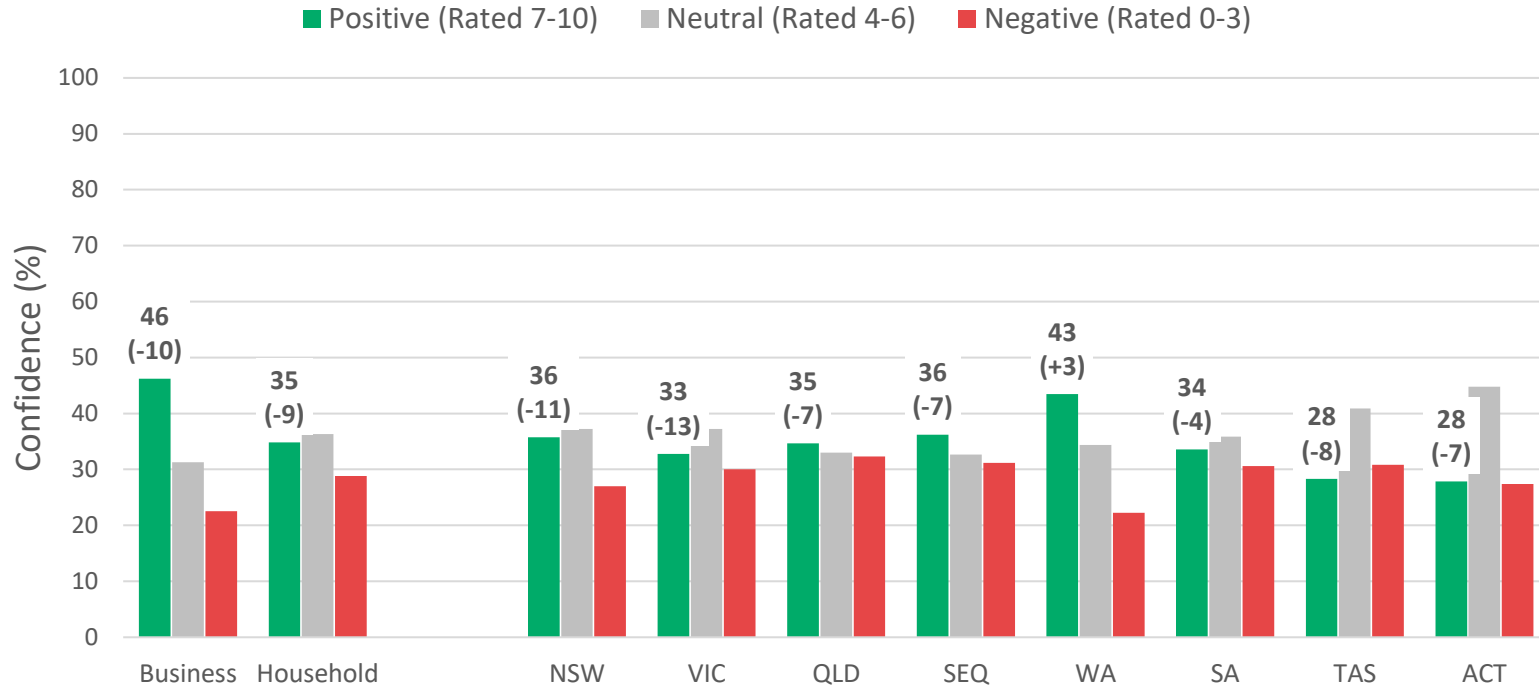
Q: How confident do you feel in the following...? **That there is enough easily understood information available to you to make decisions about energy products and services, by which we mean information available on the internet, through energy comparison websites or elsewhere**

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

# Confidence in availability of tools



# Confidence in the market

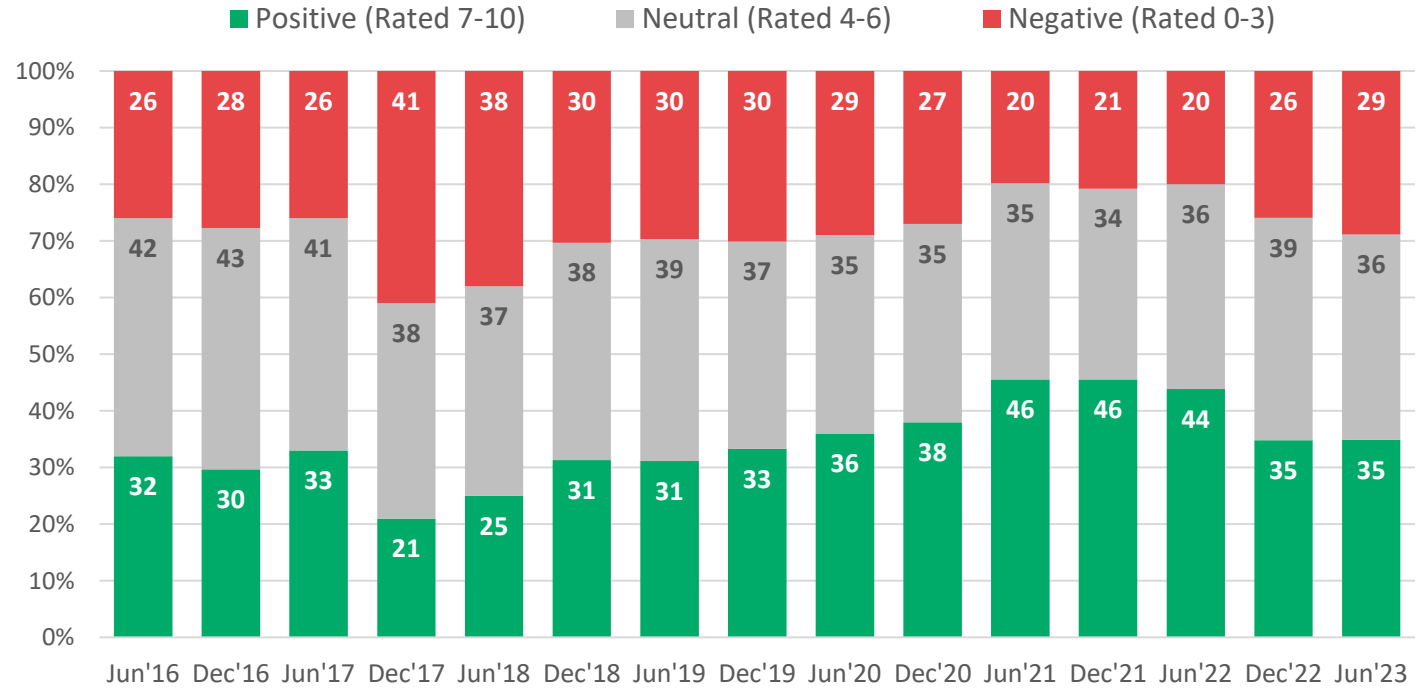


Q: How confident are you that the overall market is working in your long-term interests? By 'the market' we mean, the energy industry and energy regulators.

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

Base size: All businesses (min n=500)

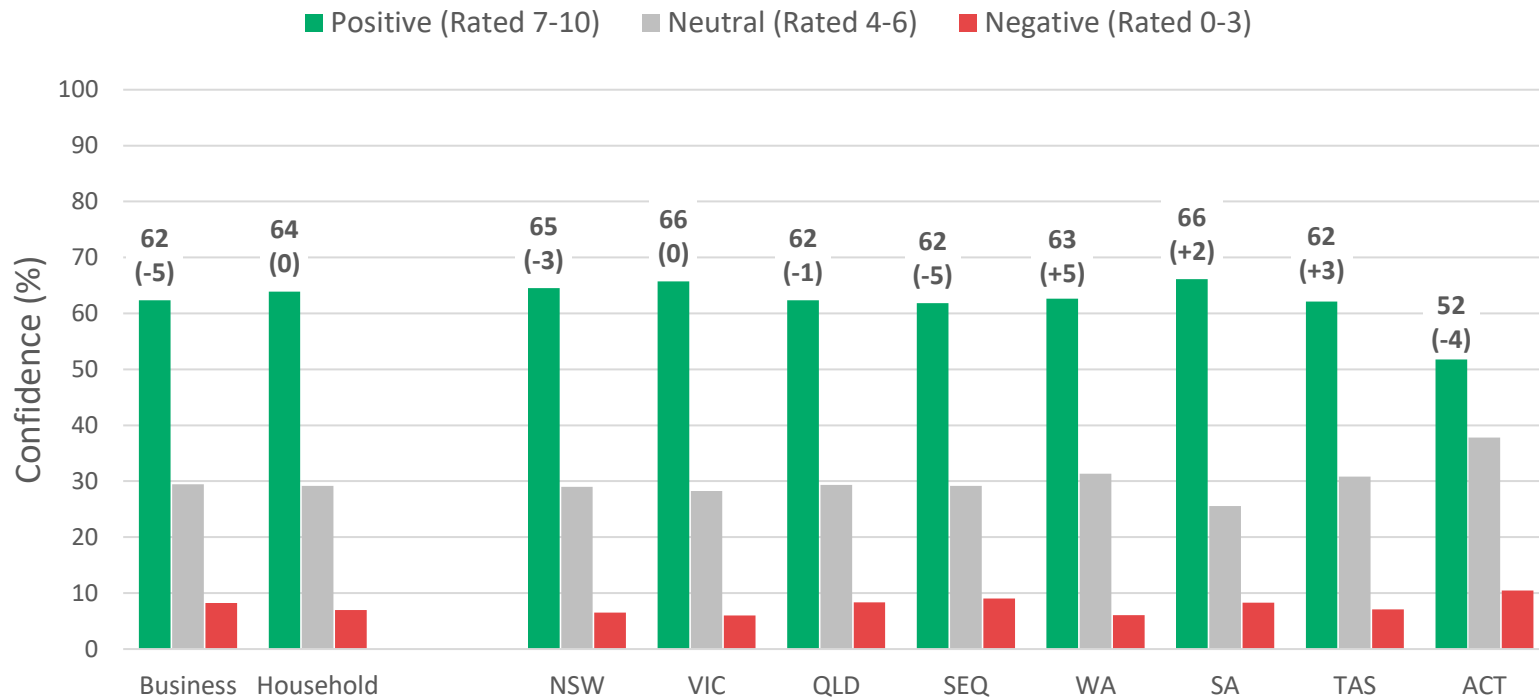
# Confidence in the market



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

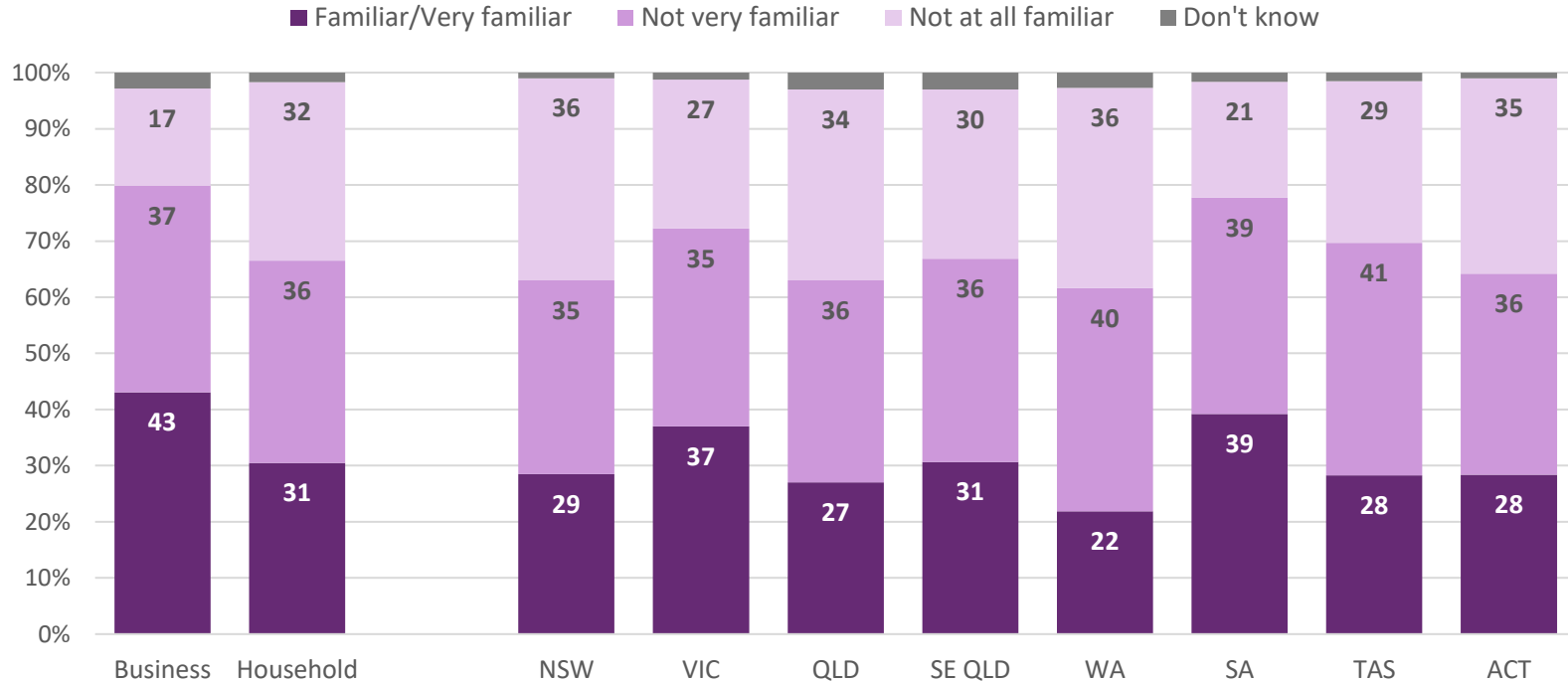


Q: How confident do you feel in the following...? **Your ability to get a problem with your energy services resolved through your energy company or a third party**

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

Base size: All businesses (min n=500)

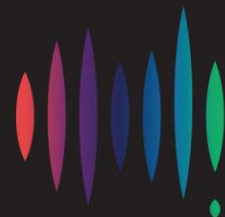
# Familiarity with Ombudsman services



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)



**ENERGY  
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