

# ENERGY CONSUMER SENTIMENT SURVEY

Small business topline results  
June 2023

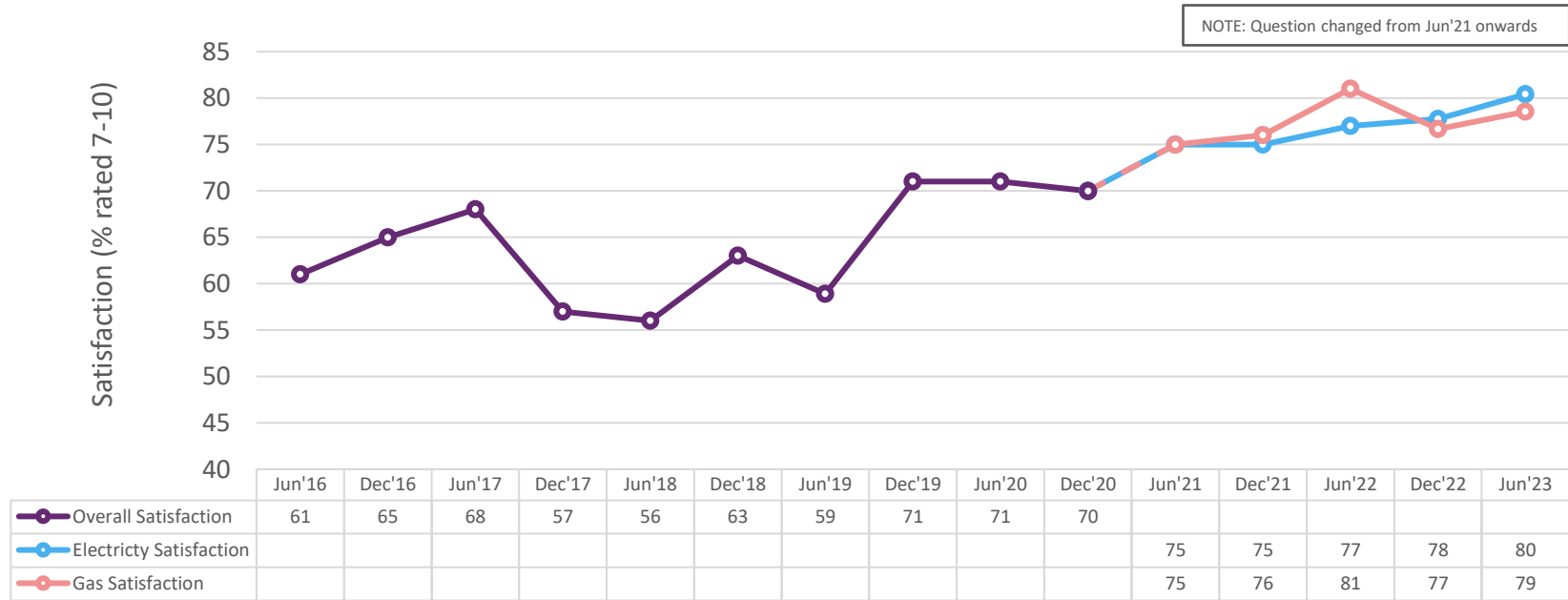


# Satisfaction

- With minimal change from last year, small business satisfaction with electricity is now at 80% (77% last year and 75% in 2021). 79% of gas users are satisfied with their service (81% in June 2022).
- The increasing cost of energy bills is raised by small businesses as satisfaction with the cost of electricity supply has decreased 13% points since last year (now 47% down from 60%), and satisfaction with the cost of gas supply has decreased 11% points (now 58% down from 69%).
- Small businesses are also less satisfied with communication from electricity and gas retailers, with satisfaction falling 10% point for electricity and 11% points for gas.



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

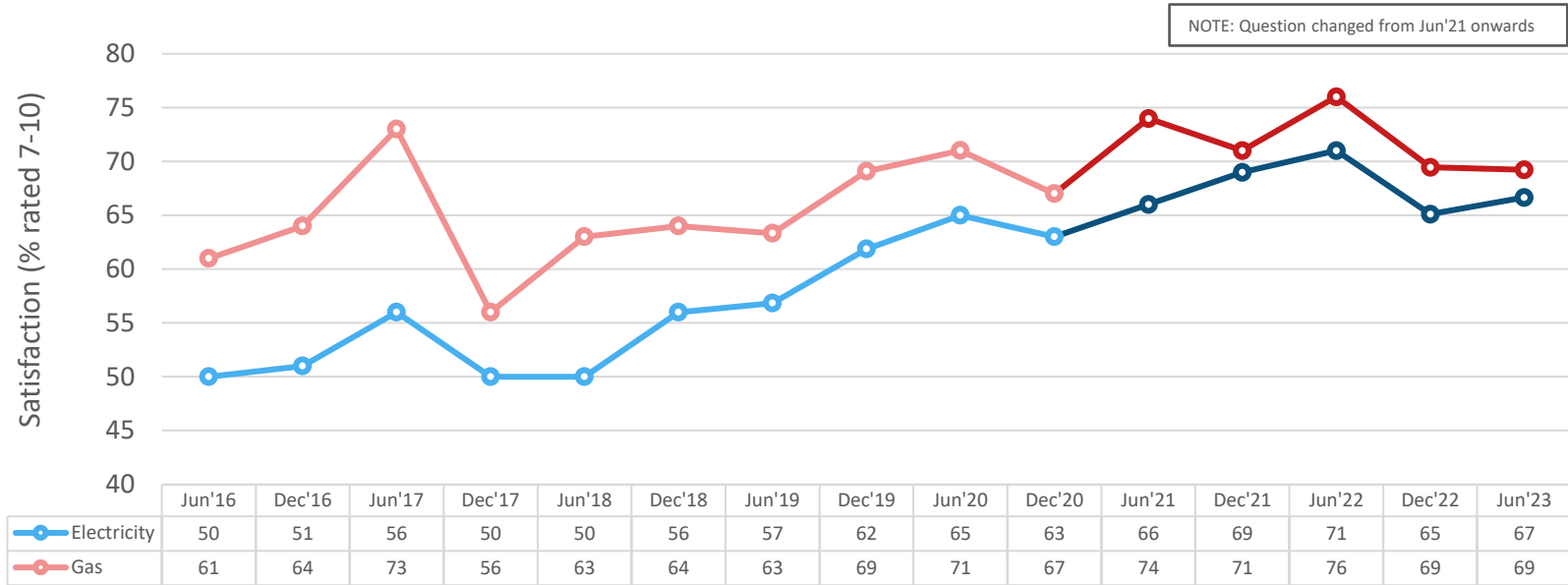


Q (Jun'16-Dec'20): How satisfied are you with the following? **The provision of your electricity and gas services overall over the last 6 months**, Base size: All businesses (min. n=280)

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



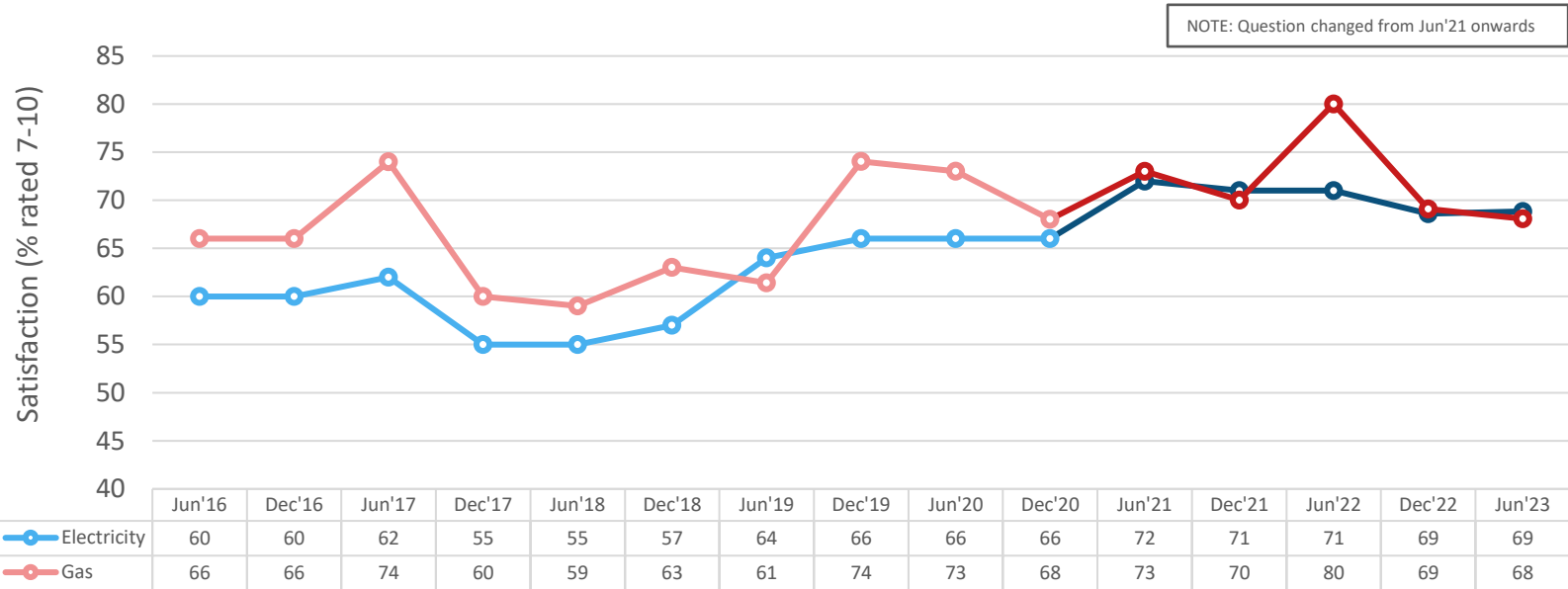
Q (Jun'16-Dec'20): How satisfied are you with the following? **The overall quality of customer service provided by your electricity company in the past 6 months**, Base size: All businesses (min. n=280)

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



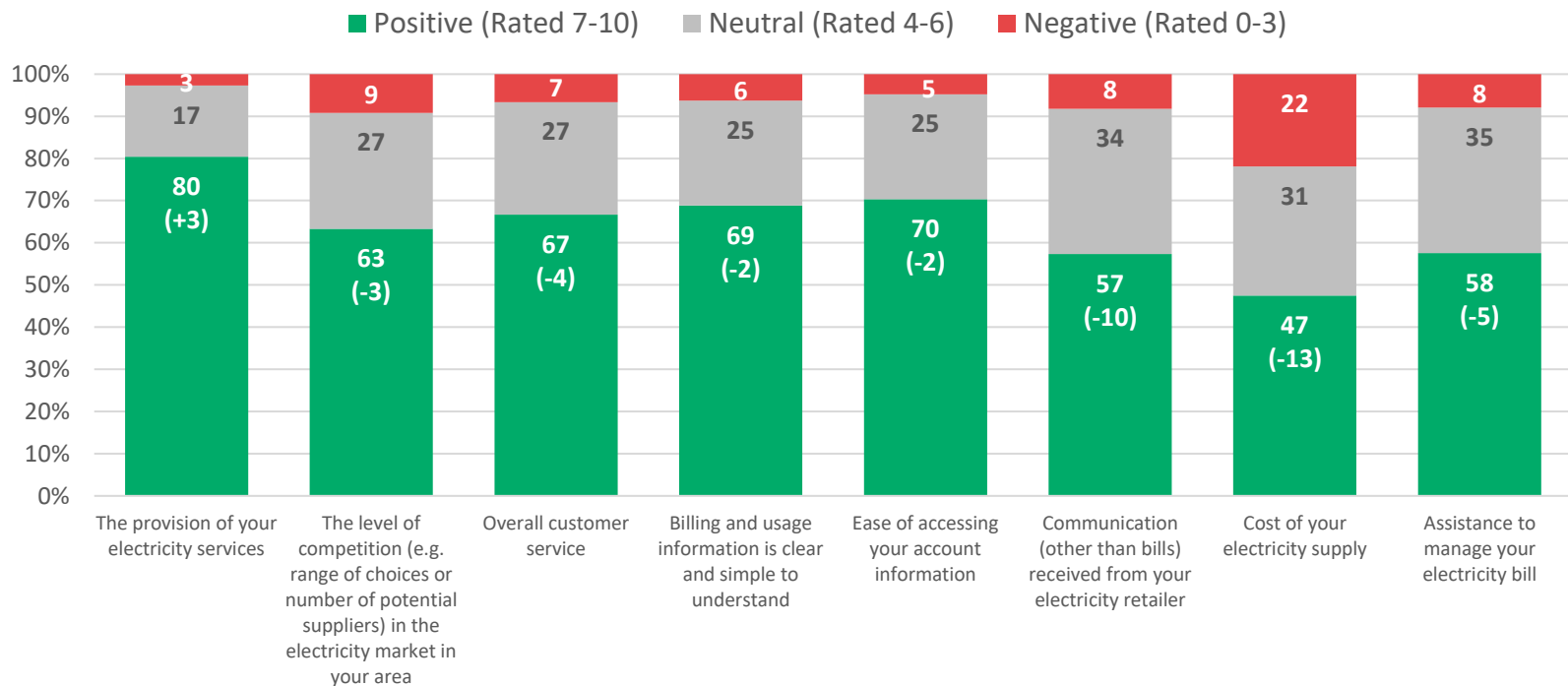
Q (Jun'16-Dec'20): How satisfied are you with the following? **The billing and account options (such as the option of monthly billing, online accounts etc.) currently available to you from your electricity supplier**, Base size: All businesses (min. n=280)

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)

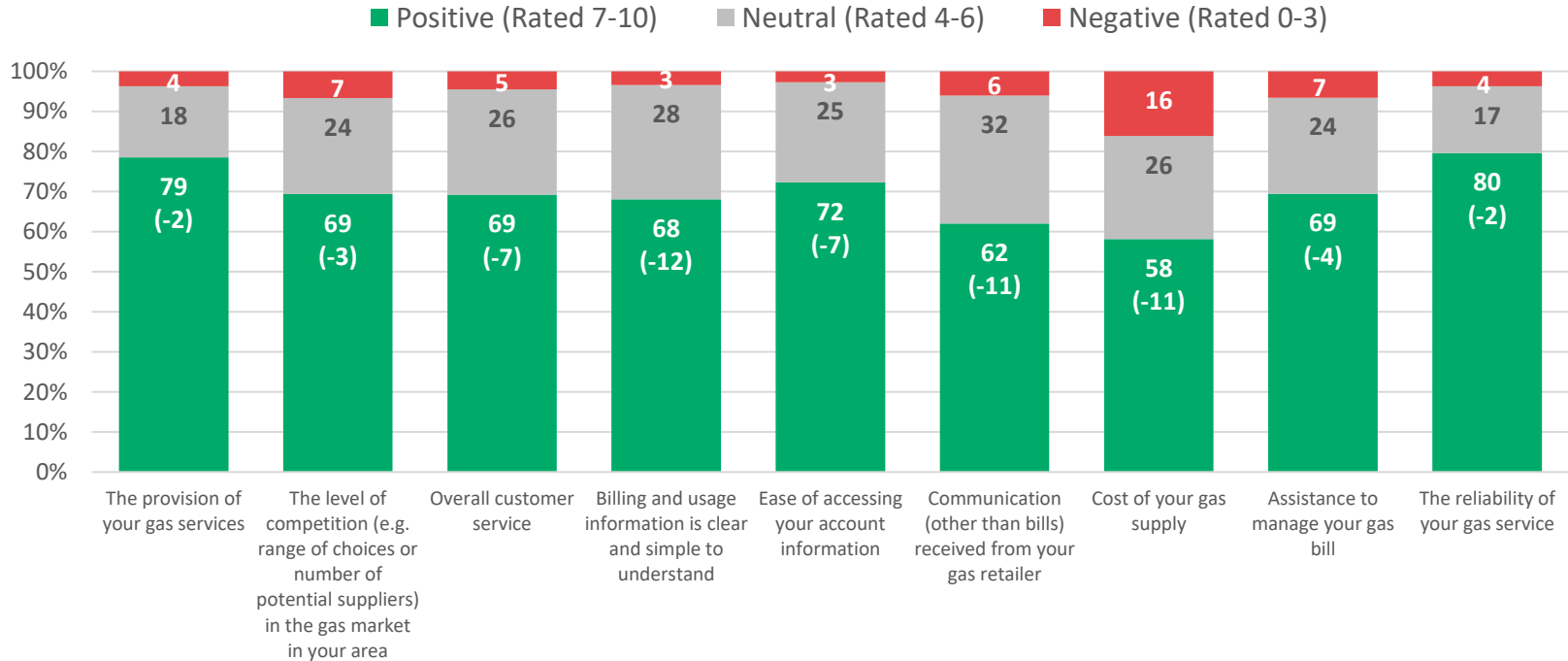
Q (Jun'16-Dec'20): How satisfied are you with the following? **The billing and account options (such as the option of monthly billing, online accounts etc.) currently available to you from your gas supplier**, Base size: All businesses with a main gas supply (min. n=199)

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)

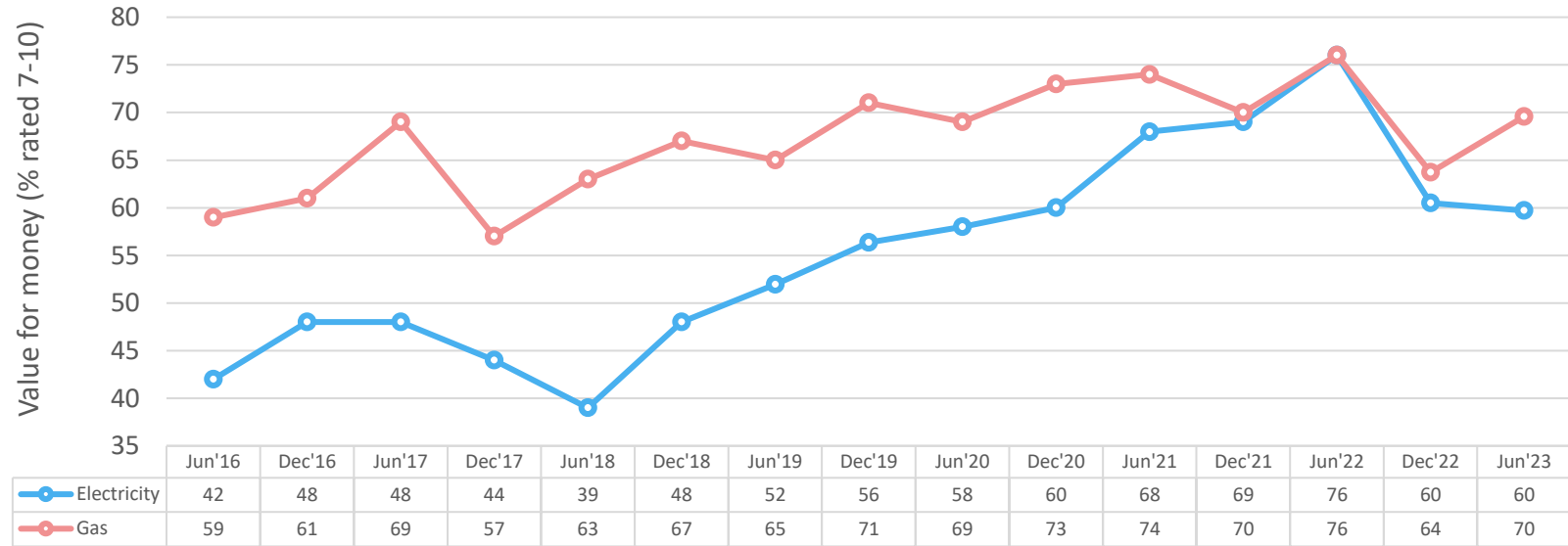
# Value for money & Outages

- There have been year-on-year decreases in the perceived value for money of electricity and gas (down 16% and 6% points respectively). Electricity is now at 60% (down from 76% last year) and gas is now at 70% (down from 76% last year).
- 31% of small businesses have been affected by electricity outages in the last 6 months (down from 37% last year).
- Satisfaction during outages has decreased. Of those who have experienced an outage, 47% were satisfied with the frequency of outages (down 16% points from last year), 43% were satisfied with the the time it took to restore power (down 19% points from last year).





# Value for money



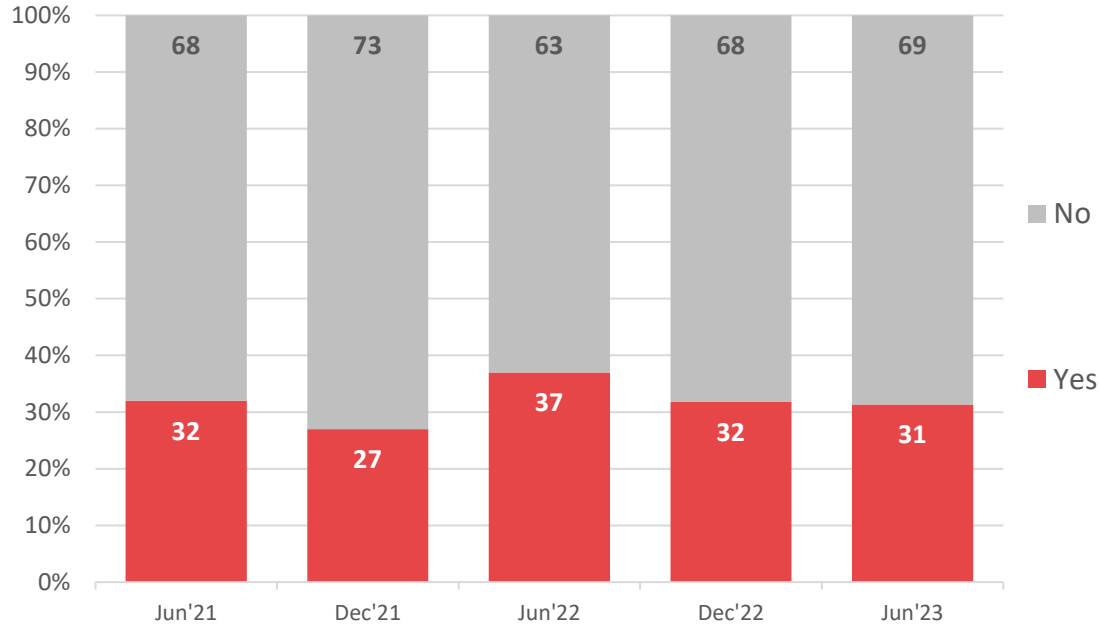
Q: How would you rate the overall value for money of the products and services provided by your electricity company in the past 6 months?

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

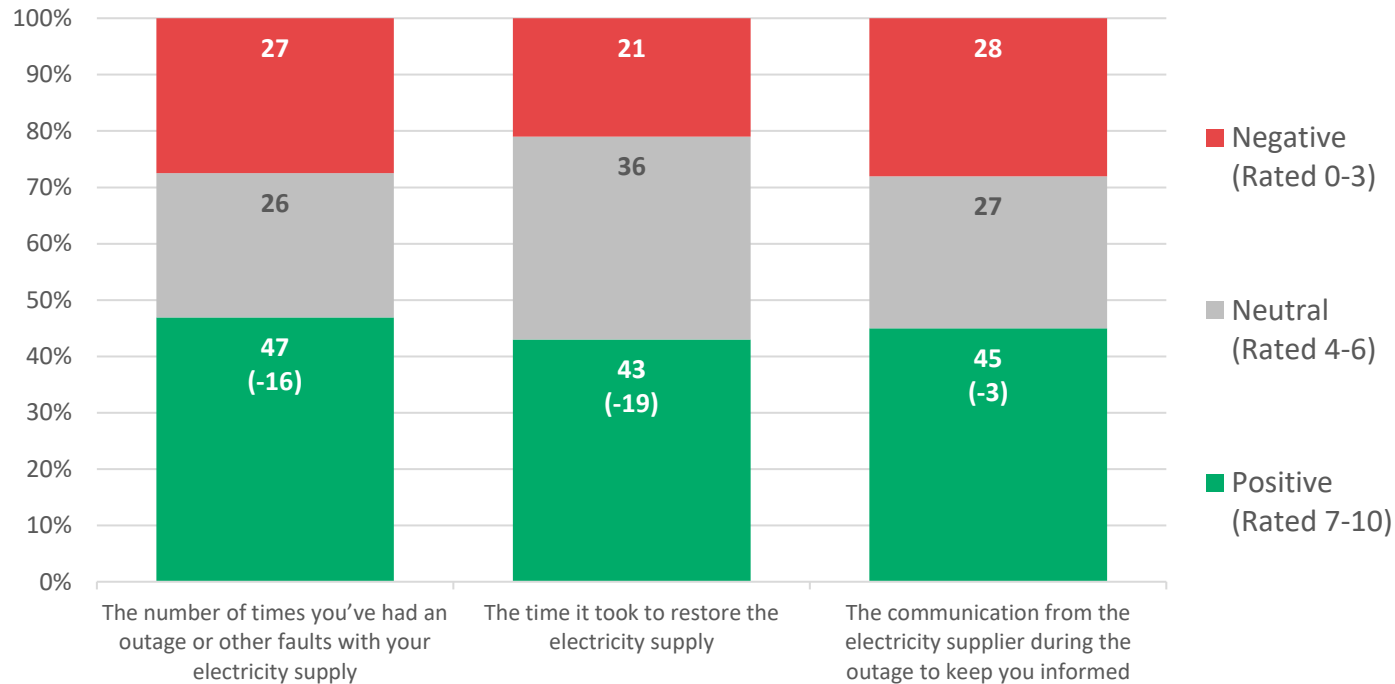
Q: How would you rate the overall value for money of the products and services provided by your gas retailer in the past 6 months?

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?

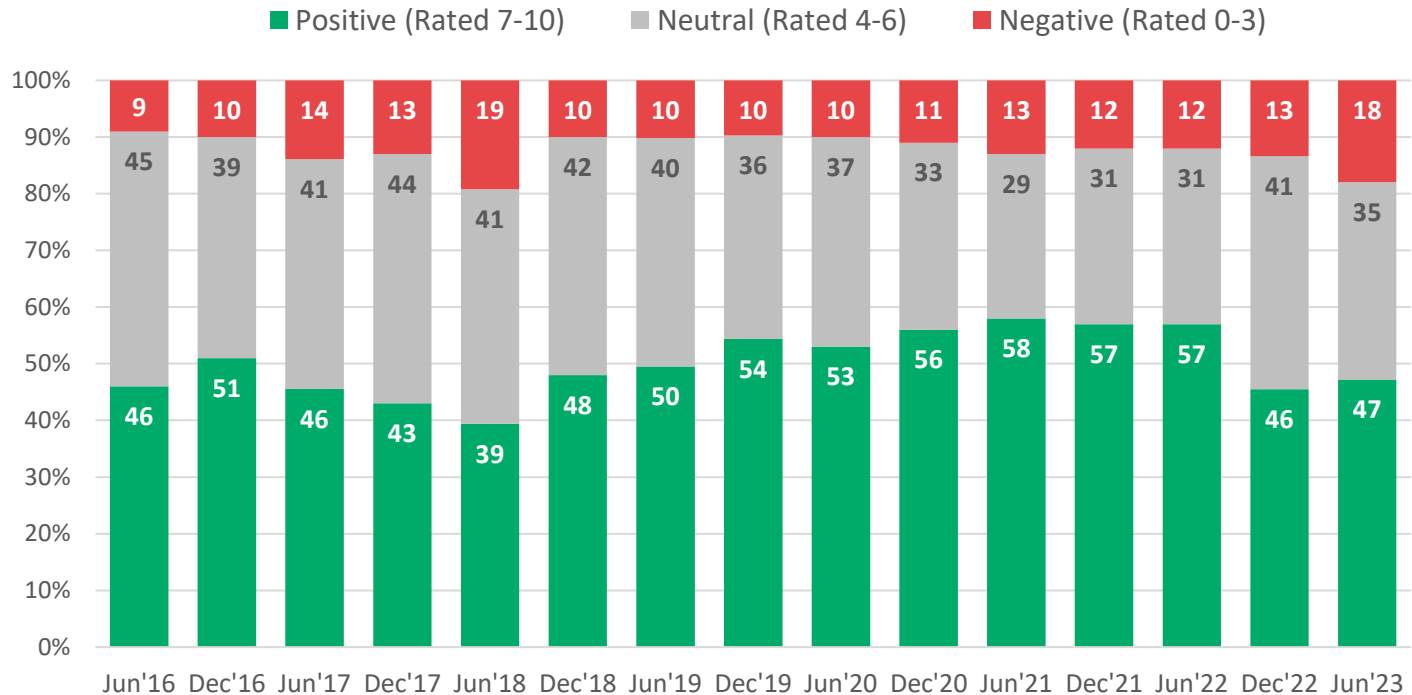
Base size: All businesses who have experienced an outage in the last 6 months (min. n=159)

# Business confidence

- Small business confidence has decreased across most measures in the past year, particularly in advances in technology and that the market is working in business's long-term interests (both down 10% points).
- Other measures which have decreased in the last year include confidence in information available to make decisions about energy products and services (58%, down 8% points), you have the tools and assistance to manage your energy use and costs (56%, down 8% points), and confidence to get a problem with your energy services resolved (62%, down 5% points).



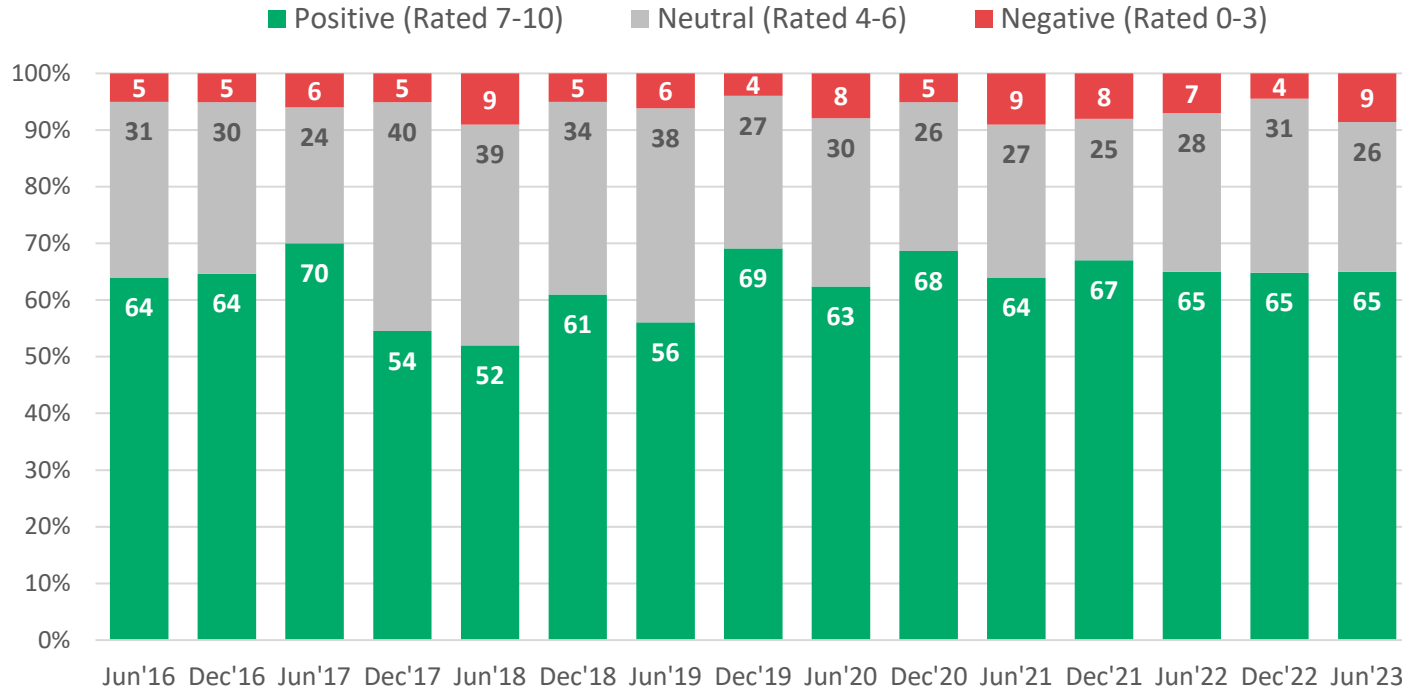
# Confidence in advances in technology



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)

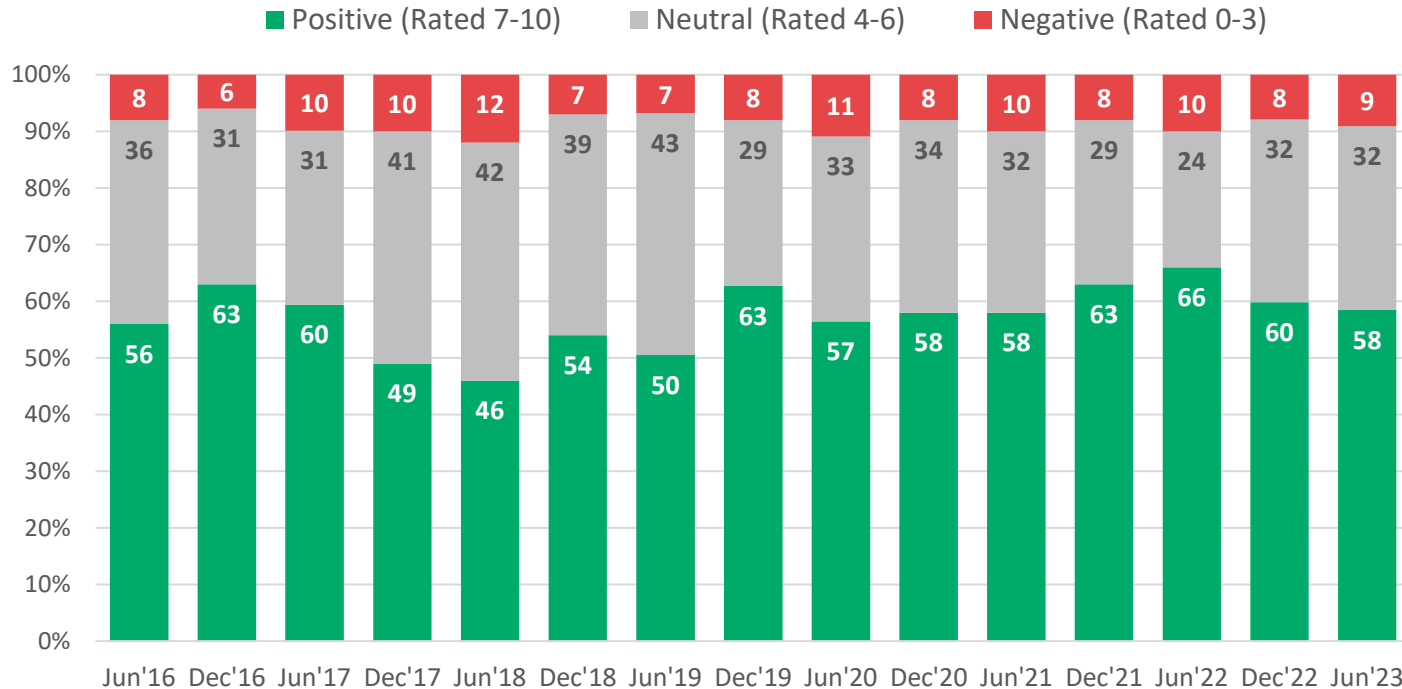
# Confidence in ability to make choices



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)

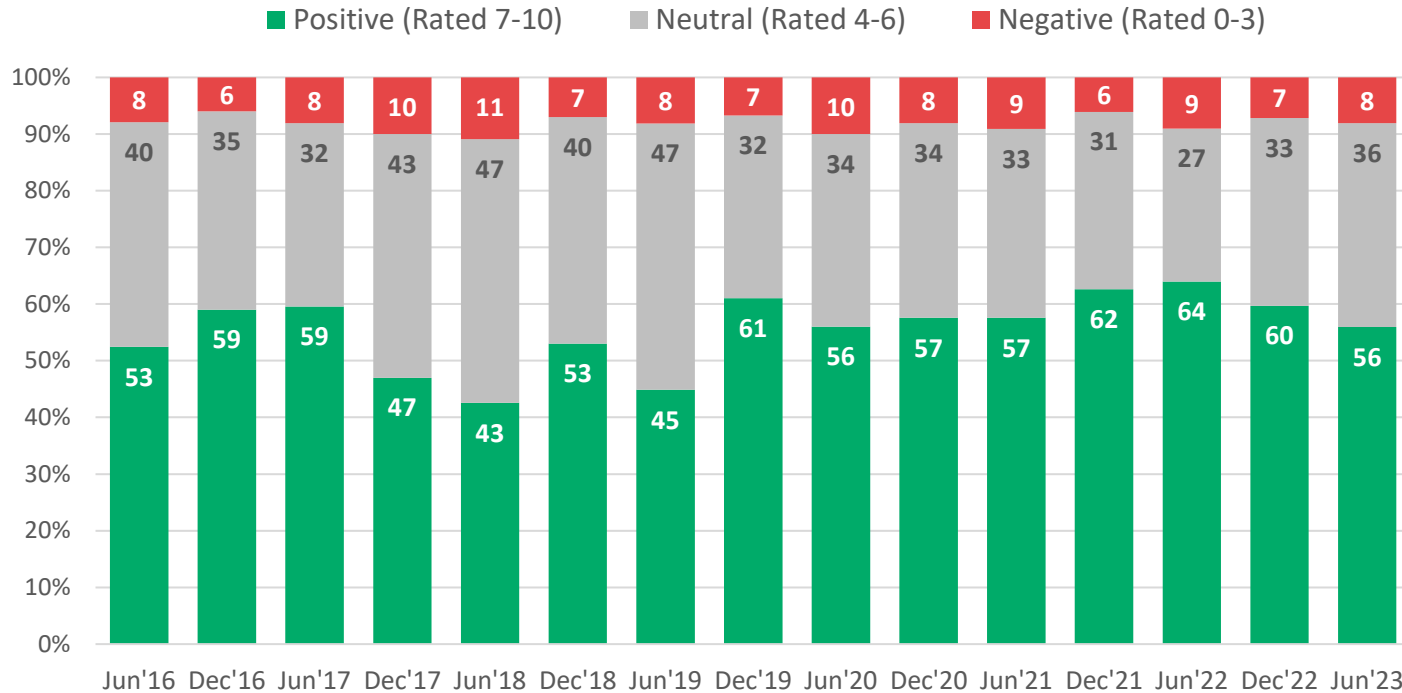
# Confidence in availability of enough easily understood information



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**

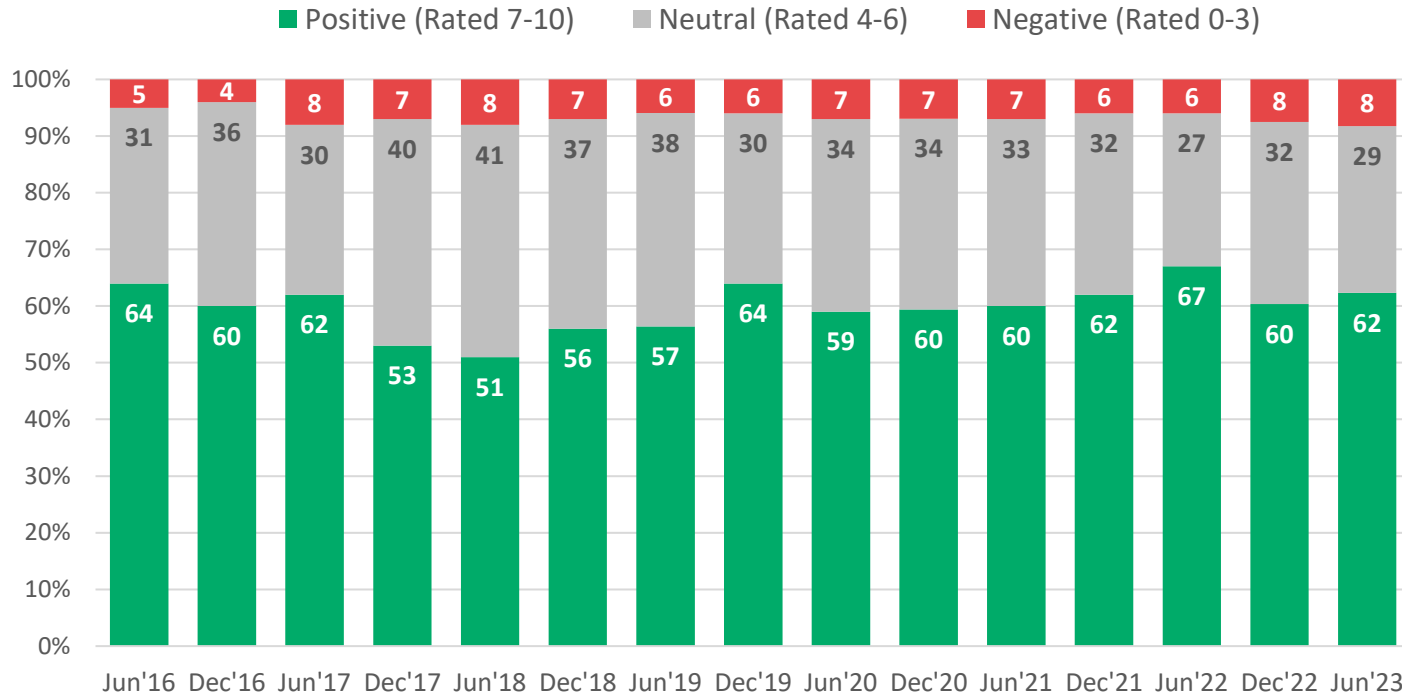
Base size: All businesses (min. n=280)

# Confidence in availability of tools





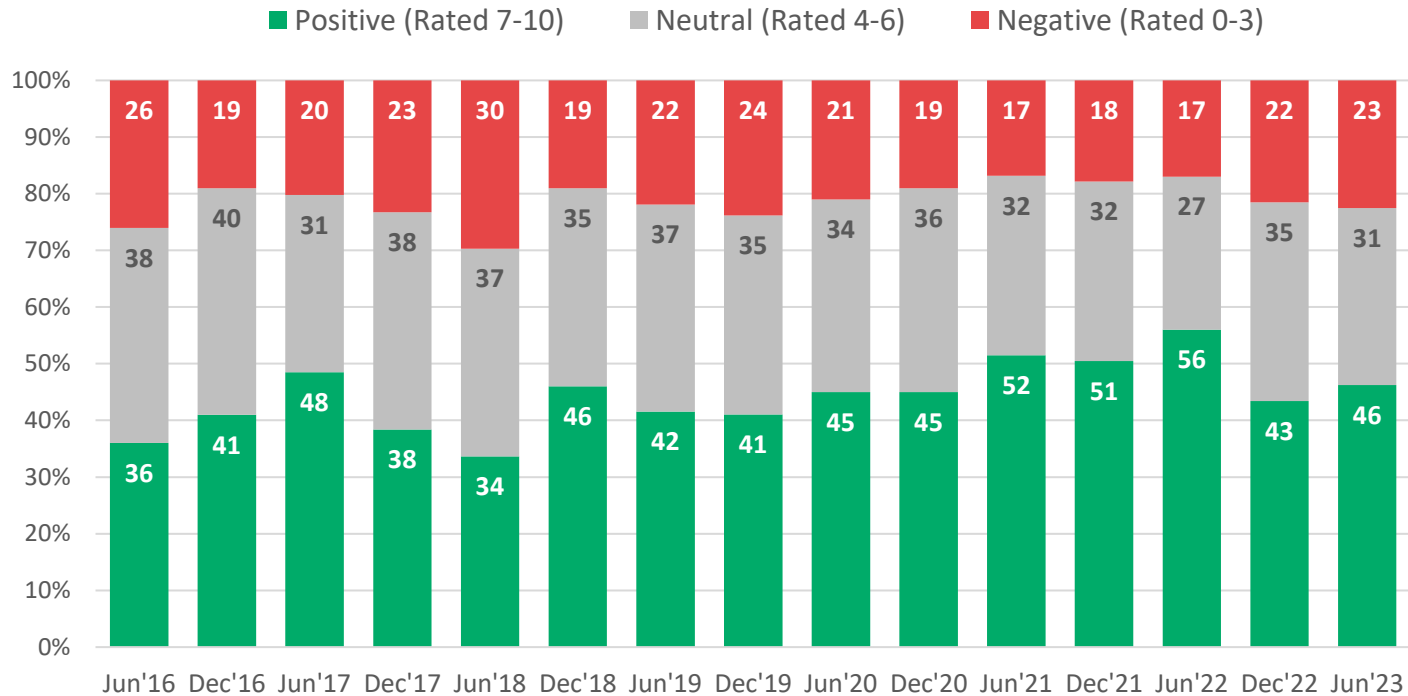
# Confidence to get problems resolved



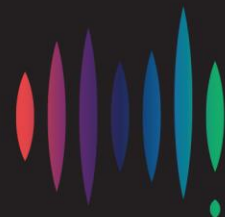
Q: How confident do you feel in the following...? **Your ability to get a problem with your energy services resolved through your energy company or a third party**

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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