Energy Consumers Australia

Energy Consumer Sentiment Survey September 2016

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Notes on methodology

This online survey was in the field from 25 August to 5 September 2016.

Energy Consumers Australia have asked us to note that there have been a number of changes in energy markets that set the context of the survey.

- Retail standing offers change on or around 1 July each year in all jurisdictions except Victoria (where retail prices change on 1 January).
- The Basslink cable was restored on 12 June 2016, six months after it failed and impacted on prices facing Tasmanian consumers.
- Retail price deregulation was introduced in South East Queensland (SEQ) on 1 July 2016, which was accompanied by a consumer education campaign and measures to support vulnerable consumers. (The results reported in the survey for Queensland do not separate SEQ customers from those in the Ergon area but are looking at ways of reporting these results in a future survey.)
- The NSW Government intends to remove retail gas price regulation from 1 July 2017, subject to an increase in retail gas market competition within regional areas.
- Wholesale gas prices in South Australia were significantly higher in July 2016 than in the previous year, averaging around $320 per megawatt hour, compared with $80 per megawatt hour in July 2015. The survey took place **before** the system black event on 28 September 2016, and subsequent summer outages due to extreme weather events.
- The survey took place **before** the announcement of the closure of Hazelwood Power station in November 2016, which has implications for increasing retail prices in Victoria.
- In a number of jurisdiction consumers could have their old analog meters replaced by digital meters, in advance of the change in the National Electricity Rules to come into effect from 1 December 2017. In Victoria the mandated roll out of “smart” meters under the Advanced Metering Infrastructure Program was completed late in 2015, while a significant proportion of consumers in the Ausgrid area also have digital meters. This has implications for how we frame the question about what knowledge consumers have about the meter at their premises.

The survey fieldwork was conducted by ResearchNow using participants from ResearchNow's online research only panel.

All other tasks were completed by Essential Research.

The target population for this research was small energy consumers, divided into households and small businesses.

- The sample was stratified by state, territory and participant type, as outlined on the next page.
- Demographic data is available that allows different consumer groups to be identified.

Quotas were also placed on age and gender for household consumers, with the final data being weighted to ABS data on age and gender.

All responses to questions are reported using a 0-10 scale.

- 10 is always the top end of the scale ('excellent', 'very confident' etc.) and 0 is always the bottom end ('very poor, 'not confident at all' etc.).
- The charts usually group responses into 'positive' (those who gave 7, 8, 9 or 10), 'neutral' (4, 5 or 6) and 'negative' (0, 1, 2 or 3).

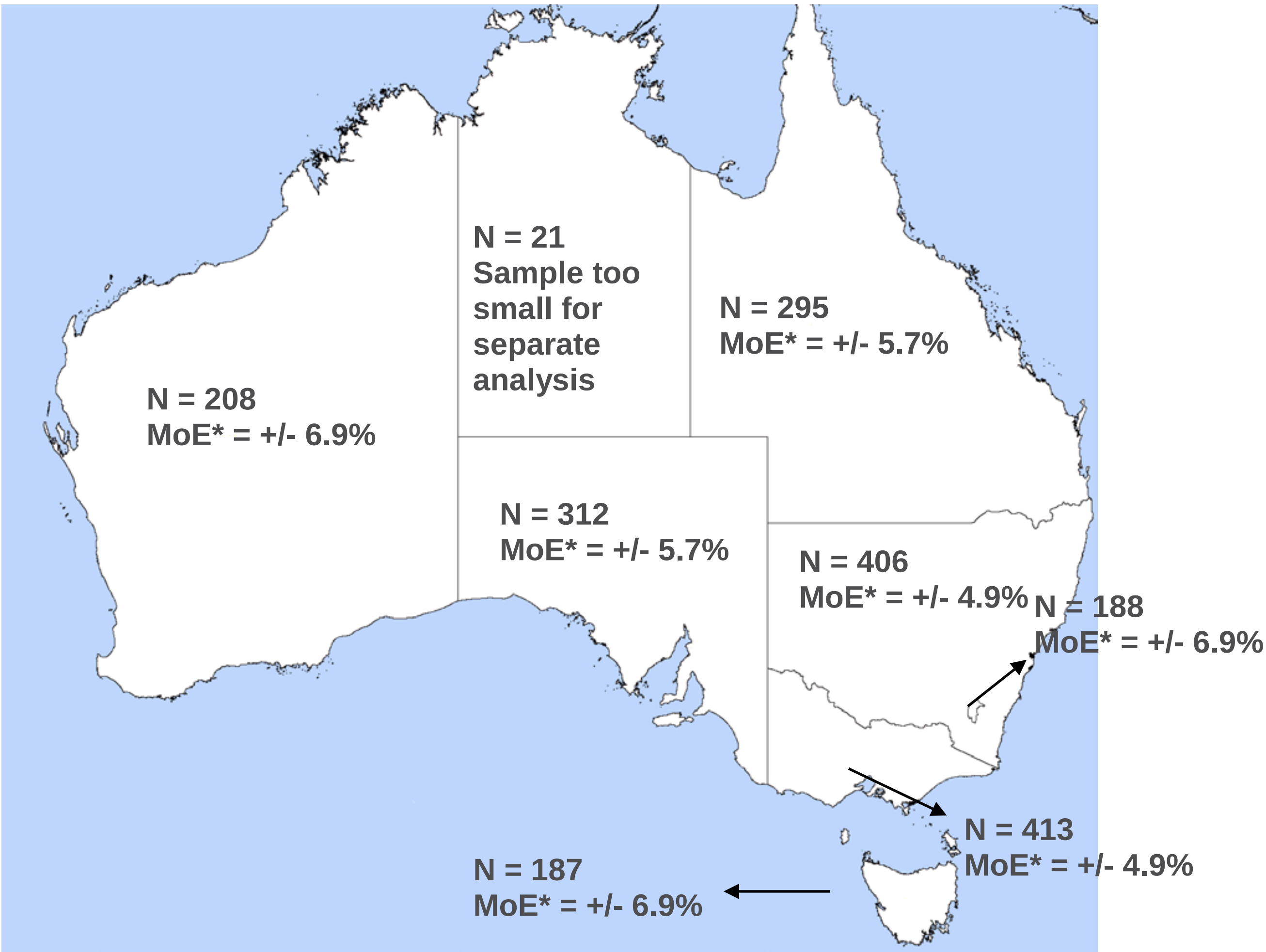
The comparison charts also often include a 'national average' for households.

- This represents the combined result for all household consumers, reported as a weighted average using the sample size for each jurisdiction as a proportion of the national total.
- National averages are intended to be indicative only. Because the sample is stratified by state and territory, some states and territories are over-represented (especially Tasmania and ACT) relative to others (especially New South Wales and Victoria) on a population basis, and the overall data has not been corrected for this.

Data labels show the current result, and then the change since the March / April survey in brackets.

"62 (-5)" therefore means that the current result is 62%, down 5% since the last survey.

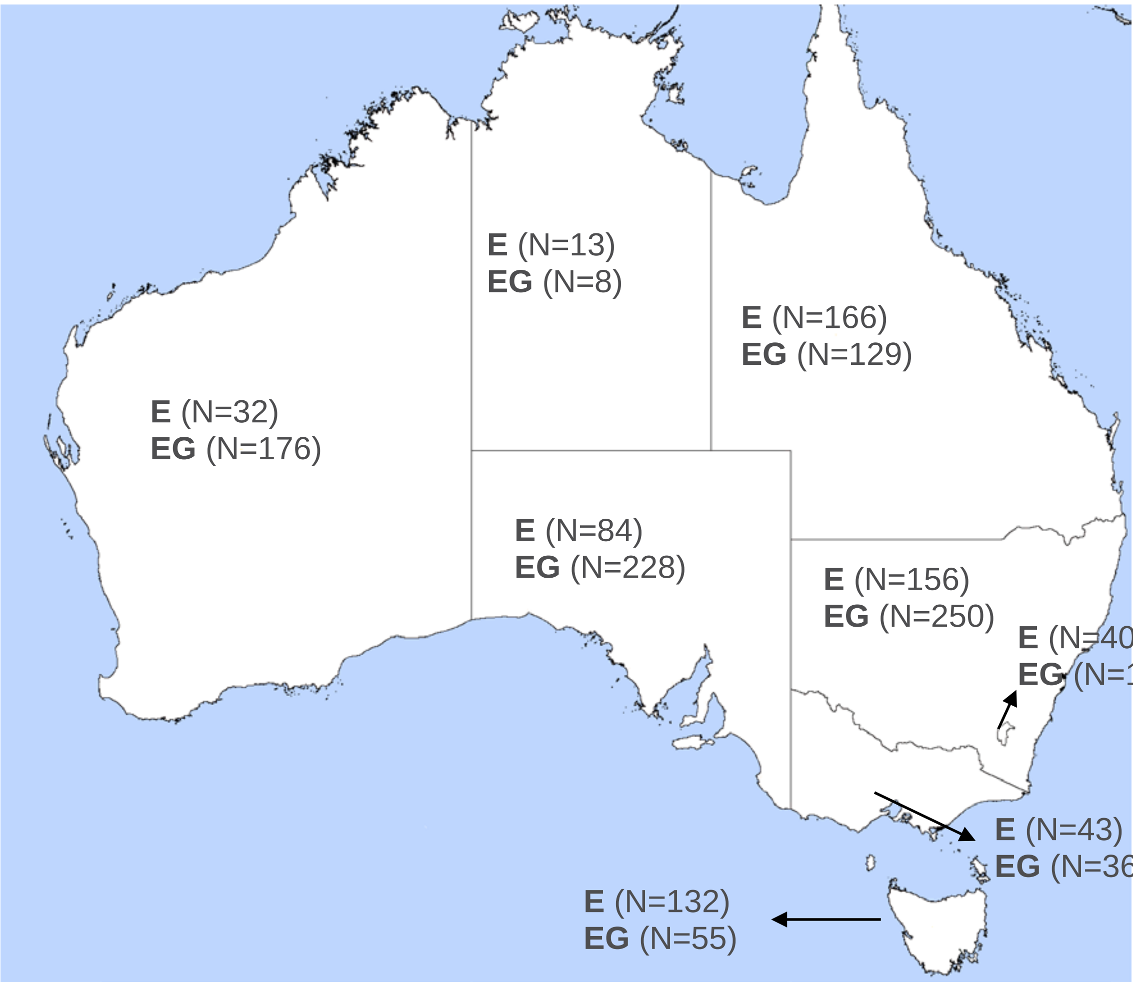
Samples by state and territory



Plus nationwide:

Businesses with less than 200 employees
N=282, MOE* = ±5.9%
(MOE = Margin of Error)
Including N=138 with 19 or fewer employees
and N=144 with 20 or more employees

Samples by energy types



KEY
E Only electricity
EG Electricity and gas

Plus nationwide:

Businesses with less than 200 employees
E (N=75)
EG (N=207)

Summary Findings

Summary of key findings

This is the second wave of a biannual survey, and the report shows both the results for this survey and the changes in the results between the two waves.

- Each survey reports results at a point in time.
- There may be changes between the two waves because participants in the second survey are not the same as those in the first survey. One example of this is the change between the two surveys in the proportion of households that have invested in energy saving technologies.
- Movements between the two waves of the survey could reflect seasonal changes (i.e. March to August/September) or underlying trends.
- Future waves of the survey will provide clarity in terms of whether such changes should be expected at this time of year or whether these changes are unexplained by seasonal factors. We expect that underlying trends will become evident in the survey over time.

Bearing these qualifications in mind, results for those reporting positive ratings (7 out of 10 or higher) in the second survey are generally lower for household consumers, but are somewhat higher for small business consumers.

- Overall satisfaction of households with the provision of electricity and gas services is down (except in Victoria), with the largest falls being in Tasmania (down 6% to 58% satisfied) and Western Australia (down 6% to 67% satisfied).
- Satisfaction with the value for money for electricity of households is down (except in Tasmania) with the largest falls being for NSW (down 10% on the last survey to 42%), and Western Australia (down 6% to 38%). Satisfaction with the value for money of Tasmanian households was up 2% to 31%.
- Satisfaction with the reliability of electricity supply fell in a number of jurisdictions with the largest falls in South Australia (down 8% to 69%) and Tasmania (down 7% to 71%). This survey was conducted before the late September system black event in South Australia, and after the restoration of the Basslink interconnector in June 2016. Satisfaction with reliability was higher than the previous survey for households in Victoria (up 3% to 73%) and the ACT (up 3% to 85%).

- Amongst small businesses, however, overall satisfaction is up 4% to 65%, satisfaction with the value for money of electricity is up 6% to 48% and satisfaction with the reliability of electricity is up 8% to 69%.

Confidence ratings have mostly remained steady amongst household consumers, compared with the previous survey but the proportion reporting positive ratings is generally higher amongst small business consumers.

- The exceptions amongst household consumers are in the proportion that say they are confident in their ability to make choices about energy products and services in Tasmania (up 9% to 64%) and NSW (down 6% to 63%).
- While small businesses confidence in their ability to make choices is unchanged from the previous survey, there is a 7% increase in the proportion saying they are confident in the information that is available (now 63%), a 6% increase in the proportion confident that the market will provide better outcomes in terms of value for money (now 30%) and a 5% increase in the proportion saying that they are confident that it will provide better outcomes in terms of reliability (now 50%).

The proportions of household consumers with a positive rating that say they intend to switch energy companies or plans are up in NSW, Western Australia, Queensland and South Australia, down in Victoria and little changed in Tasmania and the ACT.

- The most significant changes from the previous survey are that 26% of NSW household consumers and 22% of Western Australian household consumers report that they intend to switch energy companies or plans in the year ahead, up 9% and 8% respectively since the last survey.

This survey also demonstrates that a substantial proportion of both household consumers and small business consumers have never switched either their energy retailer or their plan.

- The proportions of household consumers who say they have never switched energy companies or plans, however, ranges from 36% in Victoria to 85% in Tasmania, with 54% of small business consumers also reporting that they have never switched energy retailer or plan.
- It should be noted that these figures could include some who have lived in other states or territories in the past. Therefore, some of the people who are now counted as Tasmanian respondents may have switched while living in Victoria, and vice versa.

National findings

Satisfaction

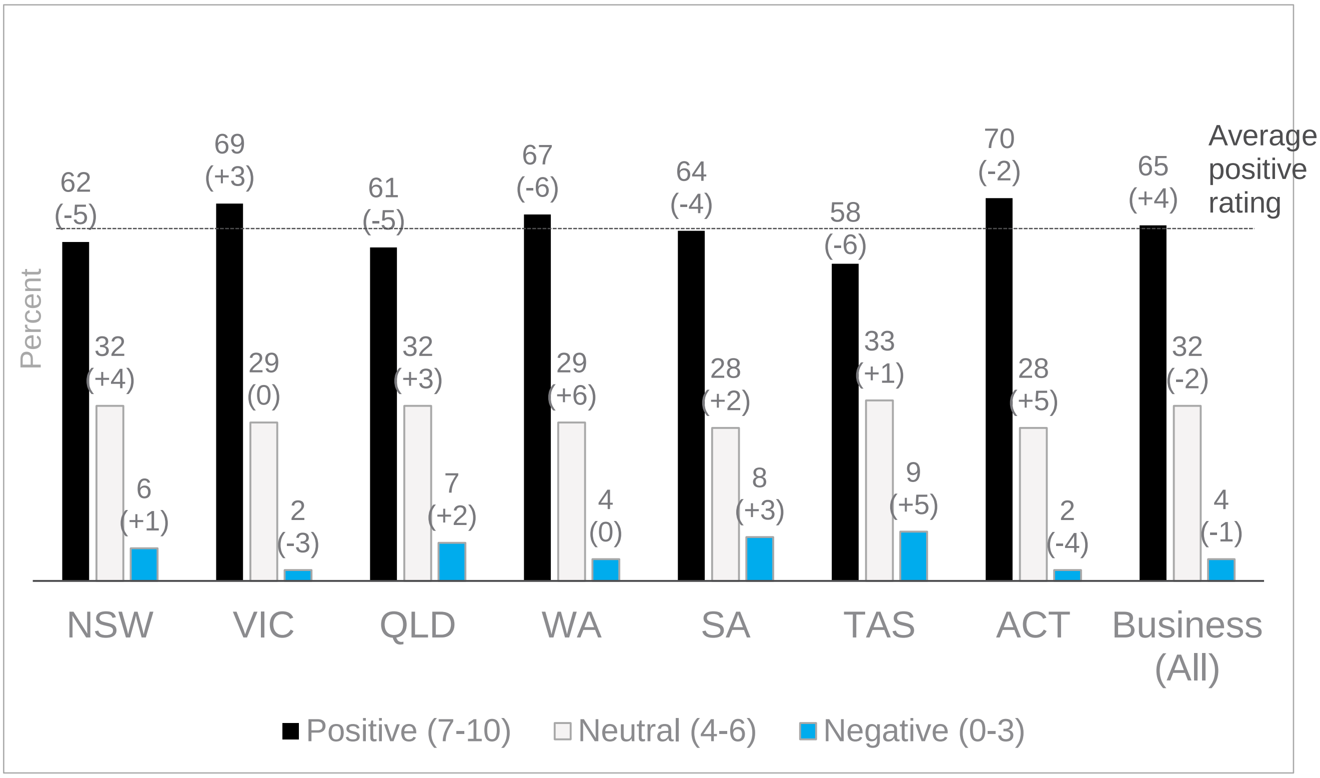
Overall satisfaction

Overall satisfaction with the provision of electricity and gas services is down at least slightly in six of the seven states and territories for household consumers, but up 4% to 65% amongst business customers.

- The largest falls in households' overall satisfaction are in Tasmania (down 6% to 58% satisfied) and Western Australia (down 6% to 67% satisfied).
- The exception to the general trend is in Victoria (up 3% to 69%).

"How satisfied are you with the provision of your electricity and gas services overall in the last 6 months?"

0-10 scale, 0='not at all satisfied', 10='very satisfied'

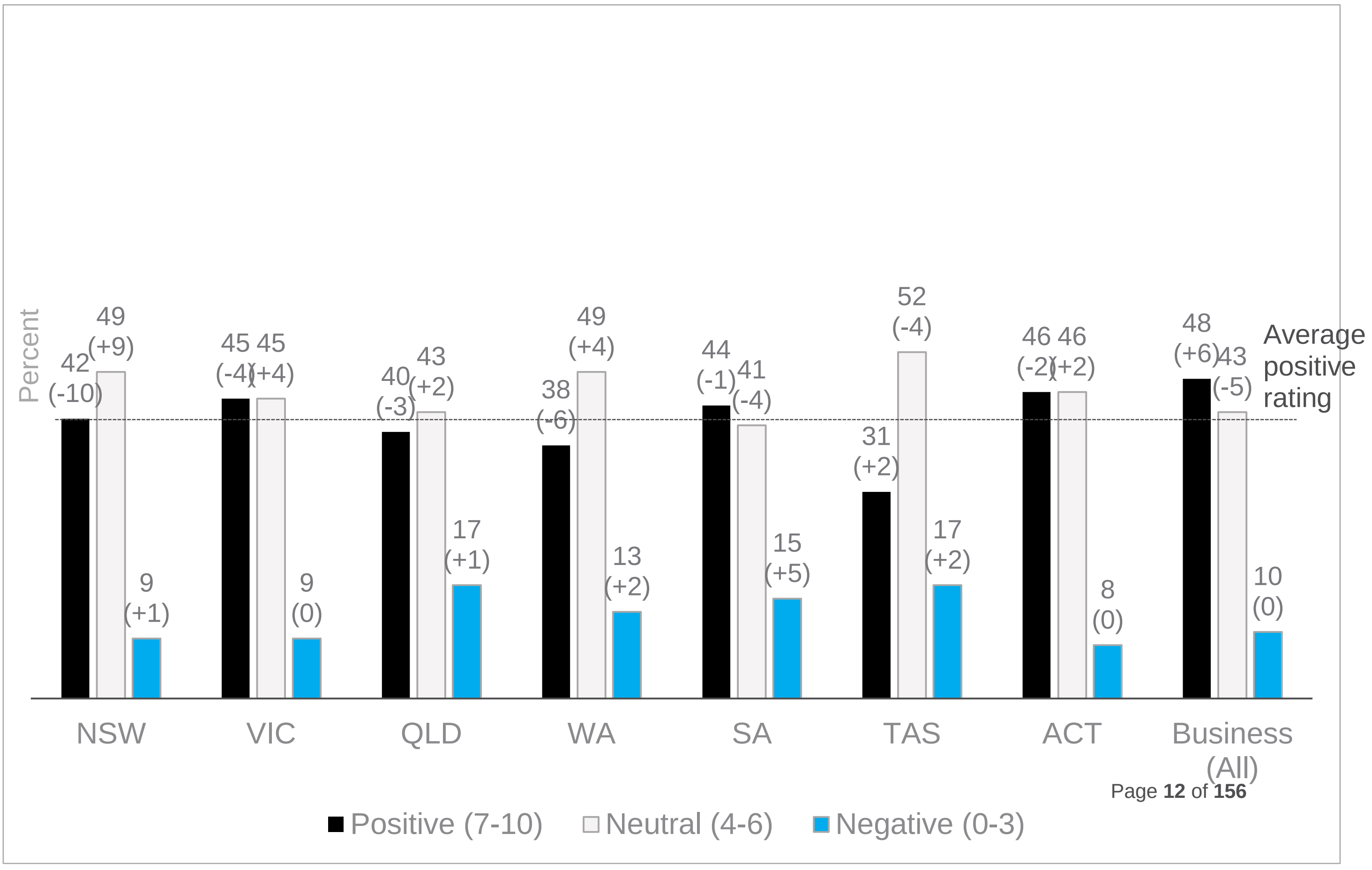


Overall value for money (Electricity)

Ratings of the value for money of electricity are also down amongst household consumers in most states and territories

- The largest changes are in NSW (down 10% to 42%) and Western Australia (down 6% to 38%).
- Until we have more data it is not possible to know whether the general downward trend could be a seasonal effect reflecting changes in energy use in the cooler months.
- 48% of small business consumers are satisfied with the value for money of electricity, up 6% since March.

"How would you rate the overall value for money of the products and services provided by your electricity company in the last 6 months?"
0-10 scale, 0='very poor', 10='excellent'



Satisfaction

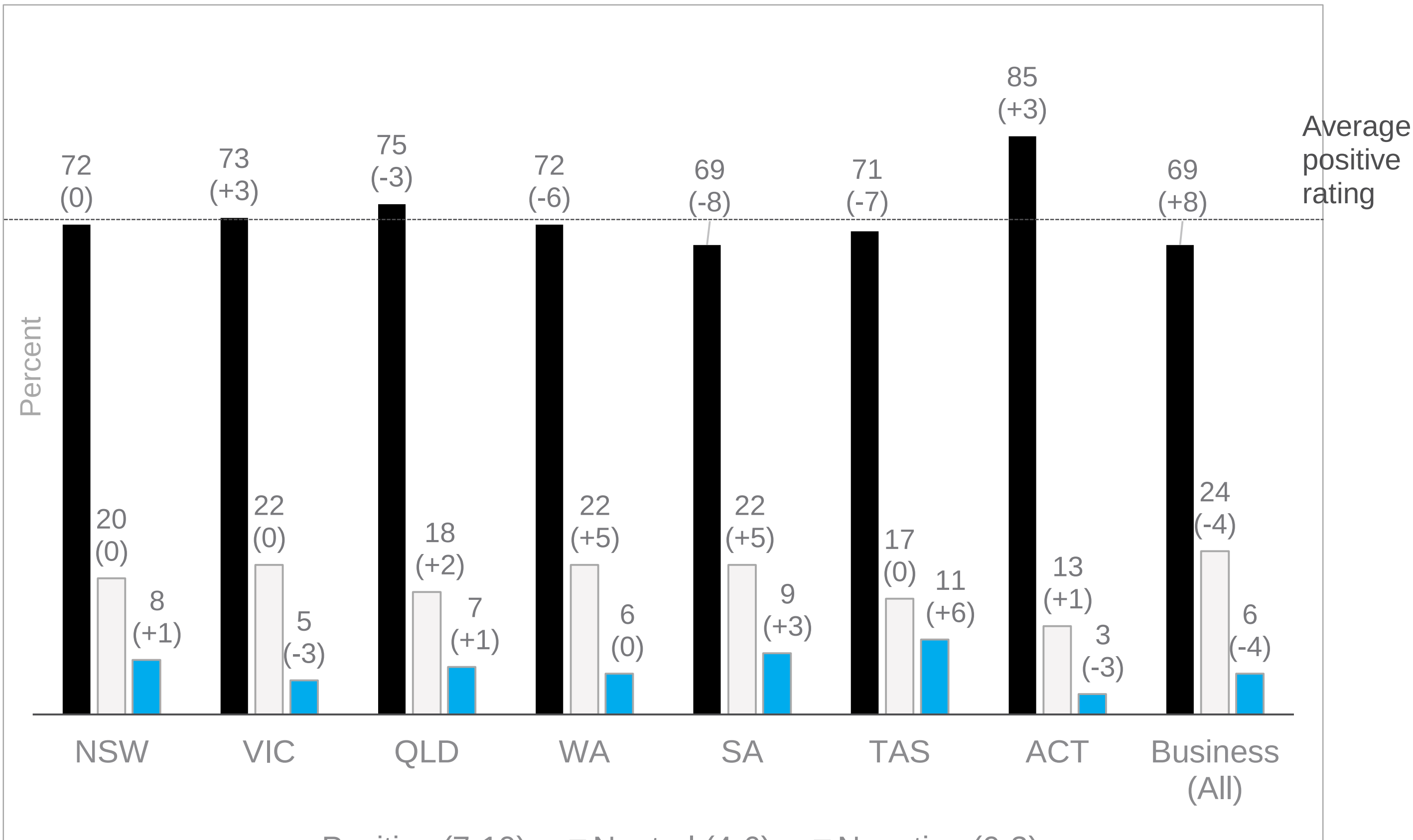
Reliability (Electricity)

There have been falls in satisfaction with reliability of electricity supply in South Australia (down 8% to 69%), Tasmania (down 7% to 71%) and Western Australia (down 6% to 72%), but an increase amongst small business consumers (up 8% to 69%).

- The response in Tasmania could reflect the six-month outage of Basslink, which was restored in early June 2016.
- This survey was, however, taken before the late September system black event in South Australia.

"Thinking about the reliability of your electricity supply, how satisfied are you with the number of times you've had loss of power, blackouts our other faults with your electricity supply in the past 6 months?"

0-10 scale, 0='not at all satisfied', 10='very satisfied'



Recommending retailers to others (Electricity)

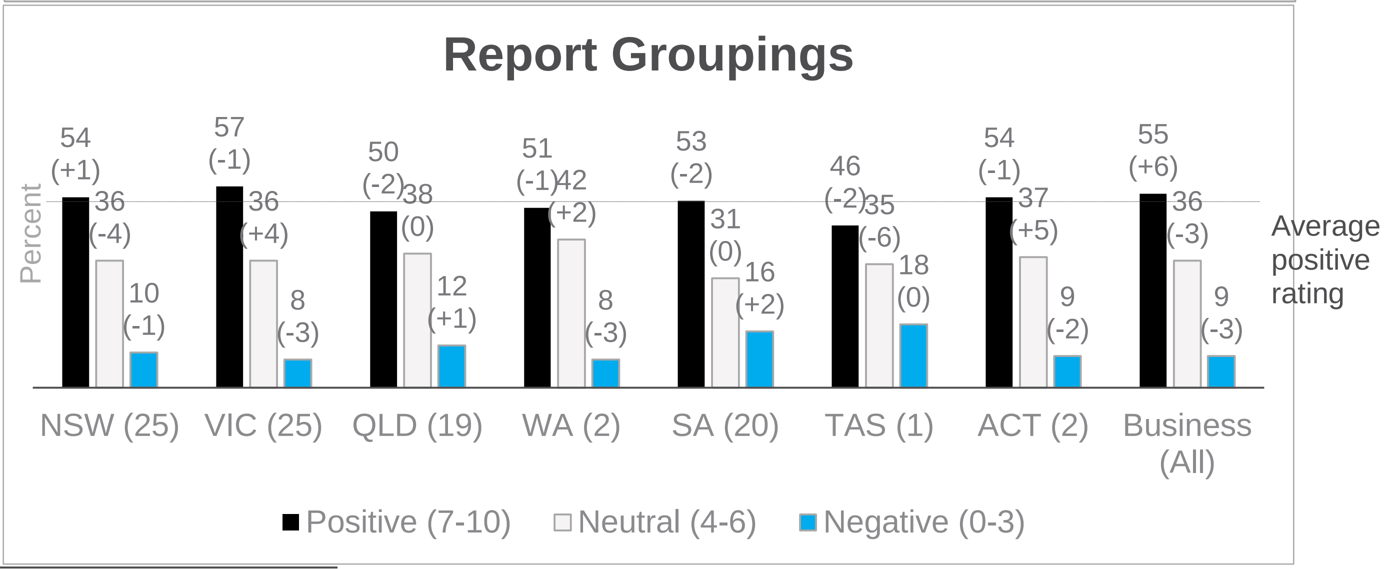
The proportion of household consumers reporting that they would recommend their electricity retailer to others was highest in Victoria (down 1% to 57%), NSW (up 1% to 54%) and ACT (down 1% to 54%).

- The largest change was amongst business consumers, 55% of whom were likely to recommend their electricity retailer (up 6% to 55%).
- Tasmanian consumers were the least likely to recommend their electricity retailer (down 3% to 46%).

An alternative measure for reporting consumer willingness to recommend their electricity retailer is the Net Promoter Score.[1]

- The national average NPS for households willing to recommend their electricity retailers is – 25, which is the same for small businesses.

"How likely is it that you would recommend your current electricity retailer to a friend or colleague? 0-10 scale, 0='very unlikely', 10='very likely'



[1] The Net Promoter Score is calculated by subtracting the percentage of detractors (defined as the proportion ranking their retailer from 0 to 6) from the percentage of promoters (those ranking their retailers from 9 to 10)

The numbers in brackets on the chart are the number of retailers operating in the specified market – e.g. there are 25 retailers in NSW.

Recommending retailers to others (Gas)

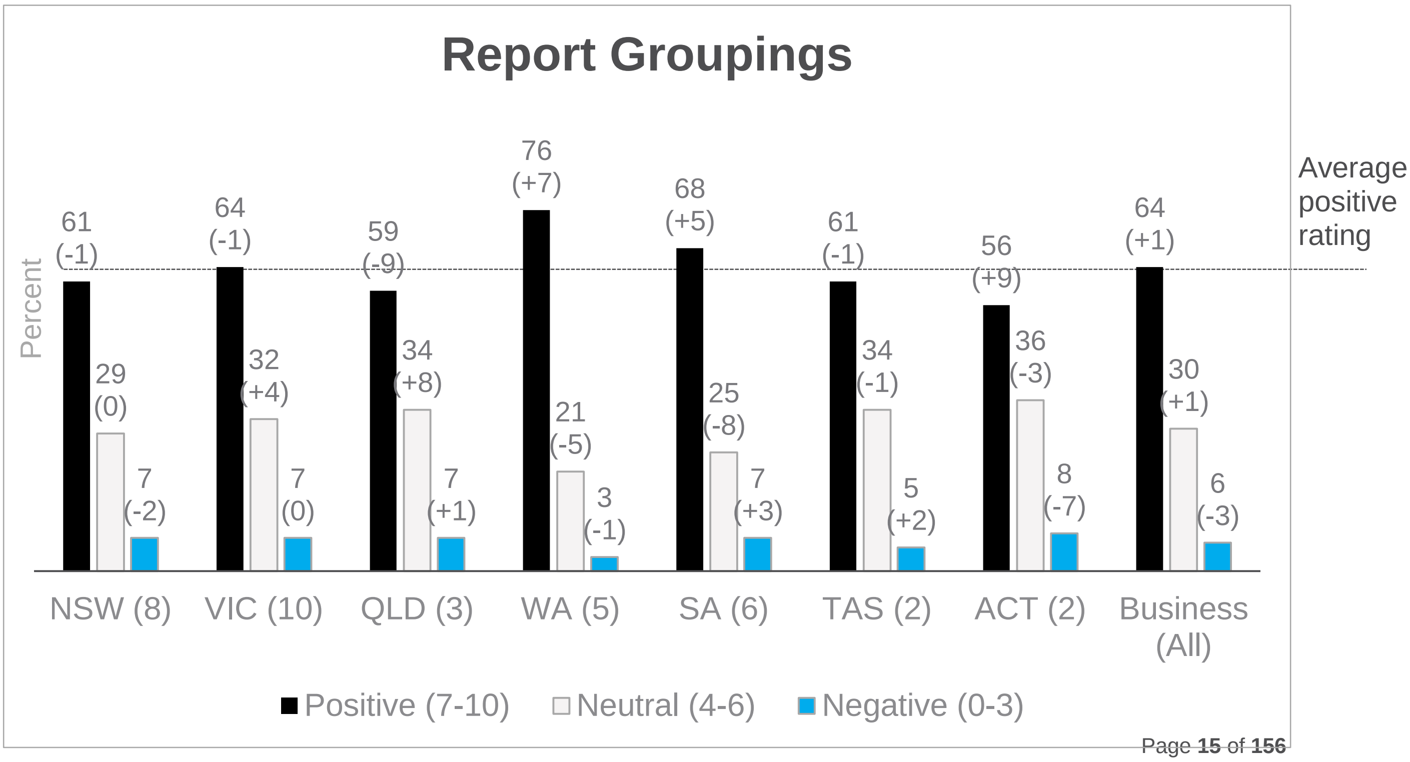
The proportion of household consumers reporting that they would recommend their gas retailer to others was highest in WA (up 7% to 76%), SA (down 1% to 61%) and Victoria (down 1% to 64%).

- The largest change was amongst Queensland consumers (down 9% to 59%).
- The likelihood for business consumers to recommend their energy retailer increased 1% to 64%.

An alternative measure for reporting consumer willingness to recommend their gas retailer is the Net Promoter Score.

- The national average NPS for households willing to recommend their gas retailers is – 14, the same as for small businesses.

"How likely is it that you would recommend your current gas retailer to a friend or colleague?
0-10 scale, 0='very unlikely', 10='very likely'



Note: Small sample size for Tasmania (n=55). The numbers in brackets on the chart are the number of retailers operating in the specified market – e.g. there are 8 retailers in NSW.

Satisfaction

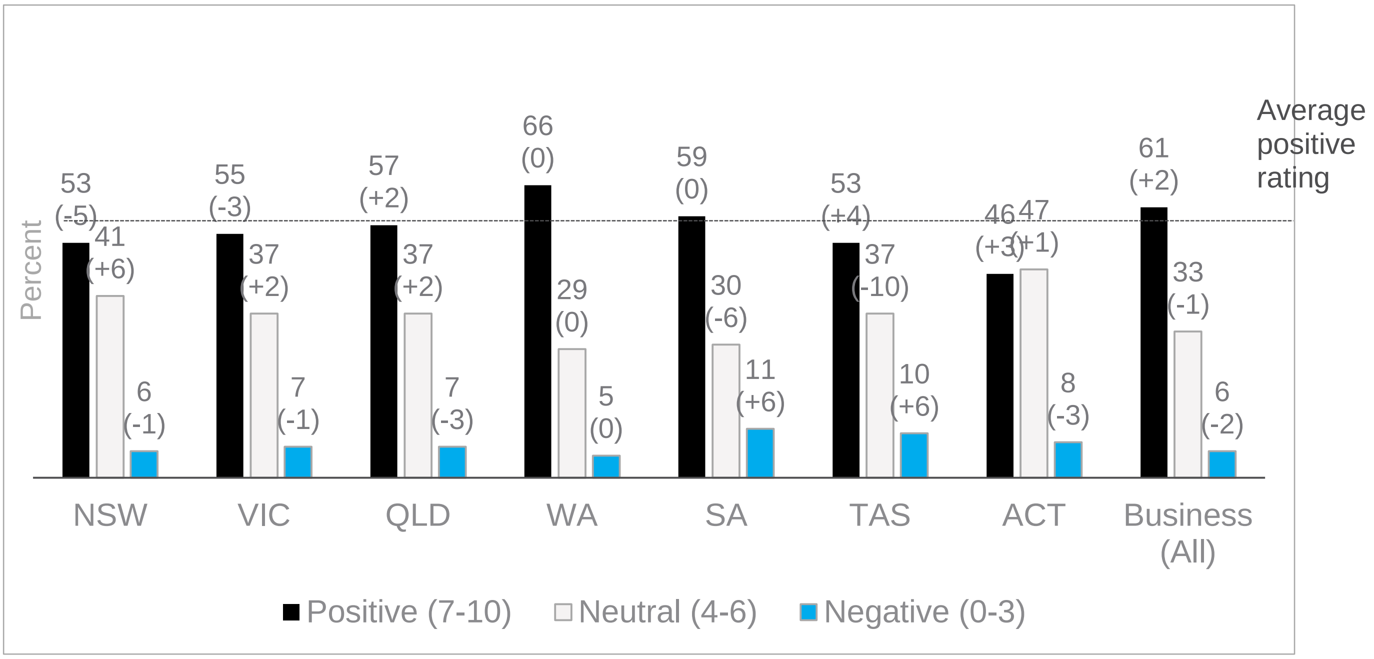
Overall value for money (Gas)

Changes in value for money ratings for gas are mostly small

- The largest change is in NSW where 53% of NSW household consumers rate the value for money of gas positively, down 5% on the last survey.

"How would you rate the overall value for money of the products and services provided by your gas company in the last 6 months?"

0-10 scale, 0='very poor', 10='excellent'



Note: Small sample size for Tasmania (n=55).

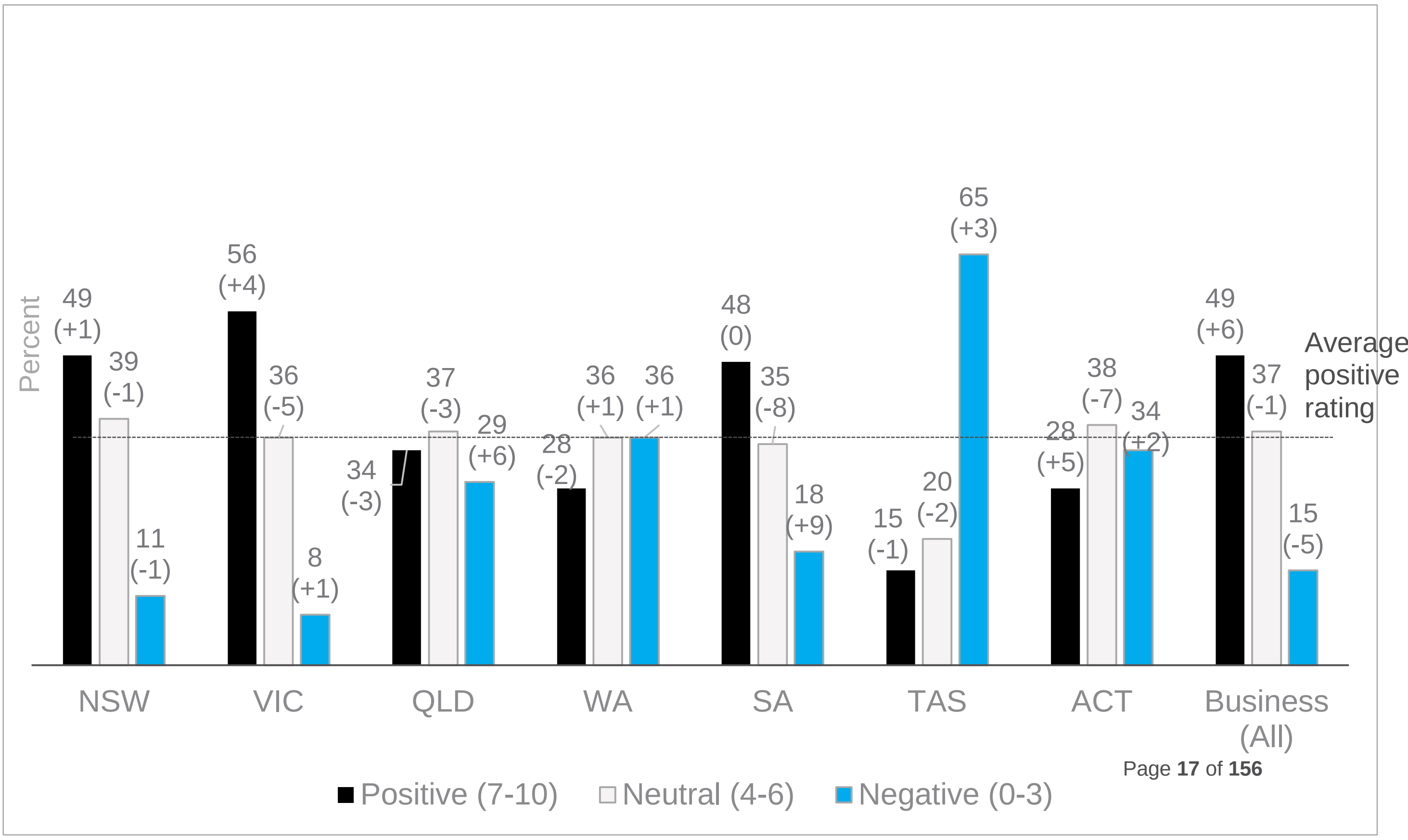
Satisfaction

Level of competition

Satisfaction with levels of competition in the energy market is up in Victoria (up 4% to 56%), ACT (up 5% to 28%) and amongst business (up 6% to 49%).

- The proportion of households that are satisfied with the level of competition is highest in Victoria, where retail electricity and gas prices have been deregulated for some time, followed by NSW and South Australia where retail electricity prices have been deregulated more recently.
- Although South Australian household consumers in this survey are as likely as those in the last survey to say that they are satisfied with the level of competition, the proportion who say they are dissatisfied is higher (i.e. fewer people give neutral ratings).

"How satisfied are you with the level of competition in the energy market in your area?" 0-10 scale, 0='not at all satisfied', 10='very satisfied'



Confidence

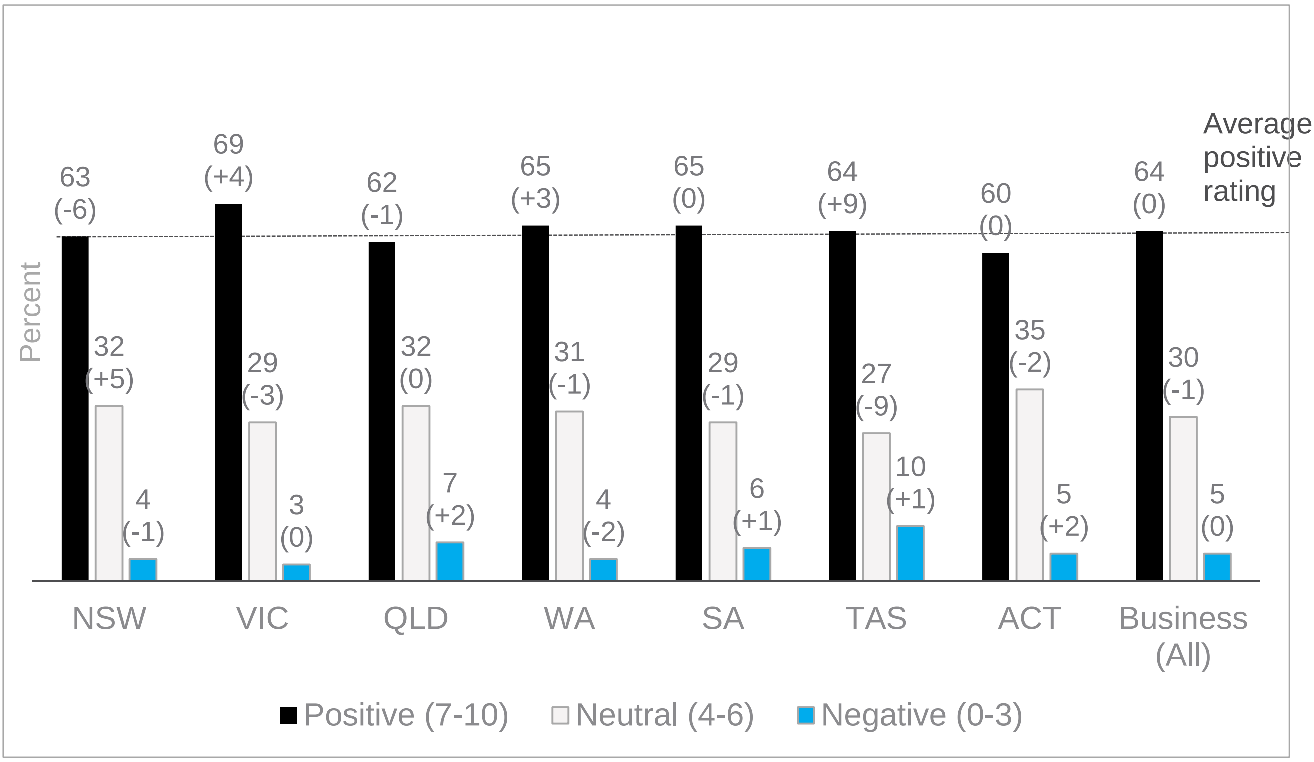
Consumer confidence in their abilities

The gap between the highest and lowest states and territories in terms of confidence in their own abilities is smaller.

- 64% of Tasmanian household consumers in this survey say they are confident in their own ability to make choices about energy products and services, 9% higher than their counterparts in the last survey.
- 63% of NSW household consumers now express confidence in their own ability to make choices, down 6% on the last survey.

"How confident do you feel in your ability to make choices about energy products and services?"

0-10 scale, 0='not at all confident', 10='very confident'



Confidence

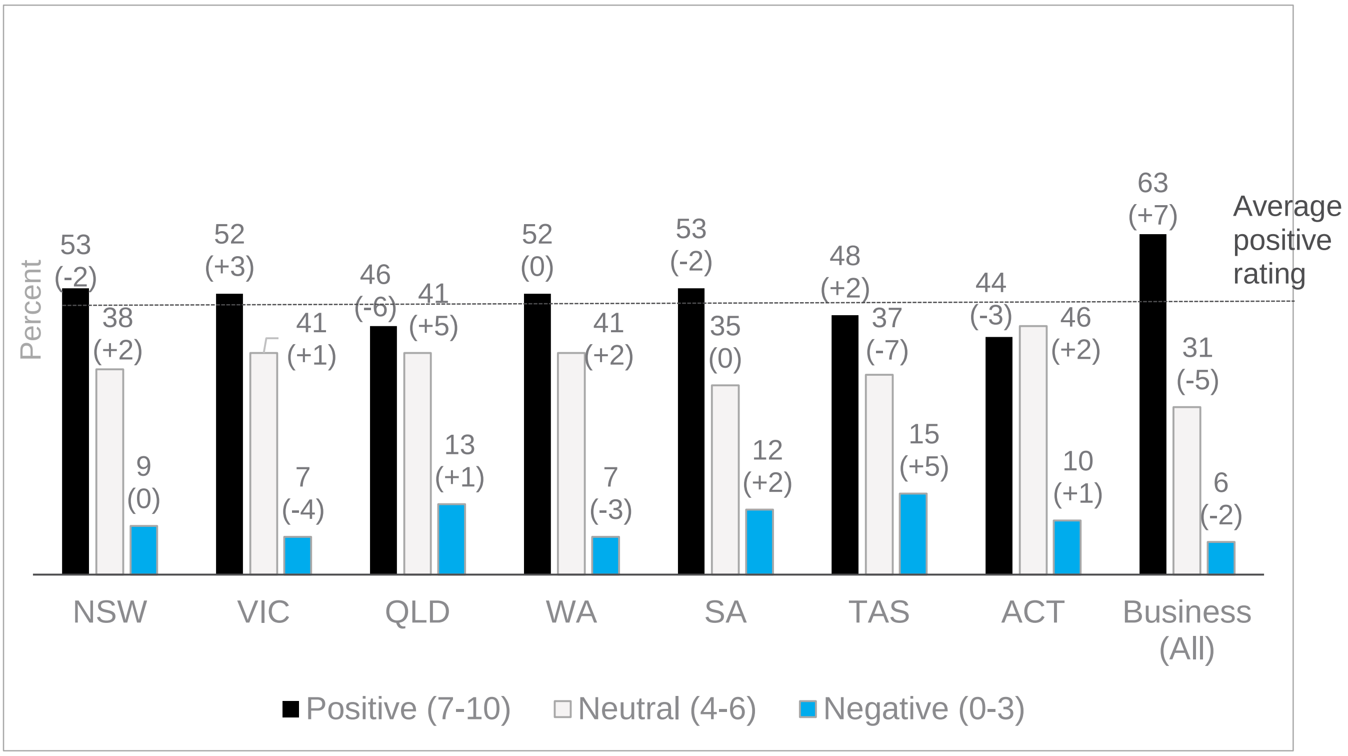
Confidence in the availability of information

The proportion of small business consumers expressing confidence that there is enough easily understood information available for them to make decisions about energy products and services is up.

- 63% of small business consumers rate this positively, up 7% on the last survey.
- Ratings from Queensland household consumers are however down 6% on the last survey, with 46% saying that they were confident in the availability of information.

"How confident do you feel that there is enough easily understood information available for you to make decisions about energy products and services?"

0-10 scale, 0='not at all confident', 10='very confident'



Confidence

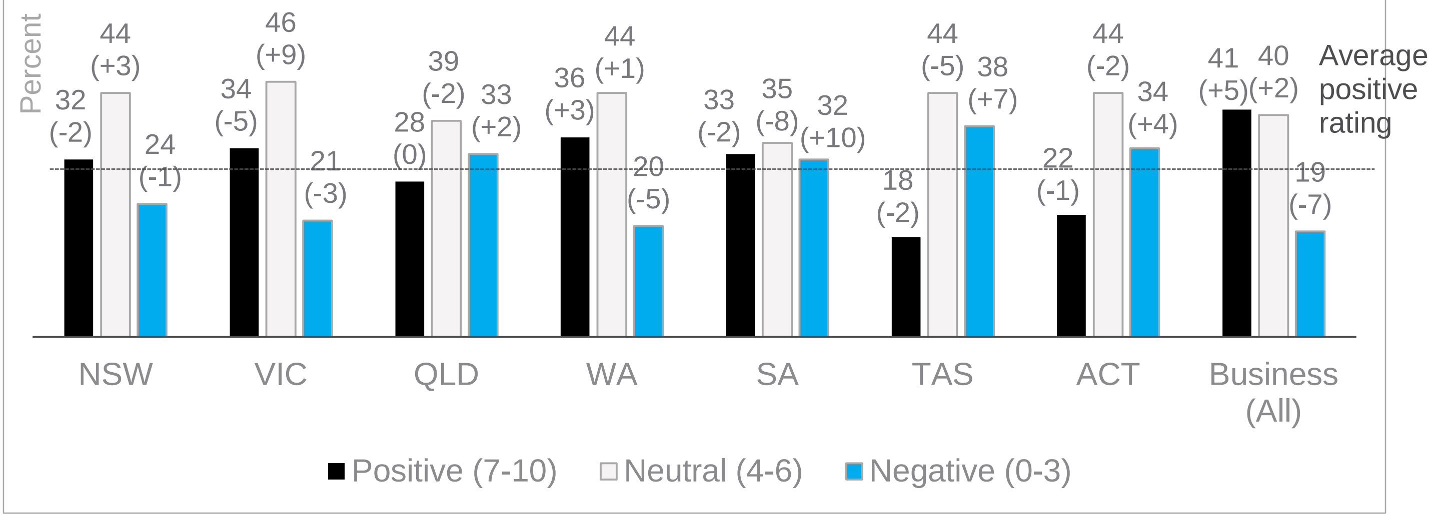
Confidence in the market

Many consumers do not believe that the overall market is working in their interest.

- 41% of small business consumers in this survey say they are confident that the market is working in their interest, up 5% on the last survey.
- The most significant change is the ratings from Victorian household consumers, down 5% on this measure, with 34% now saying they feel confident in the market.

"How confident do you feel that the overall market is working in your long-term interests? By 'market' we mean the energy industry and energy regulators"

0-10 scale, 0='not at all confident', 10='very confident'



Confidence

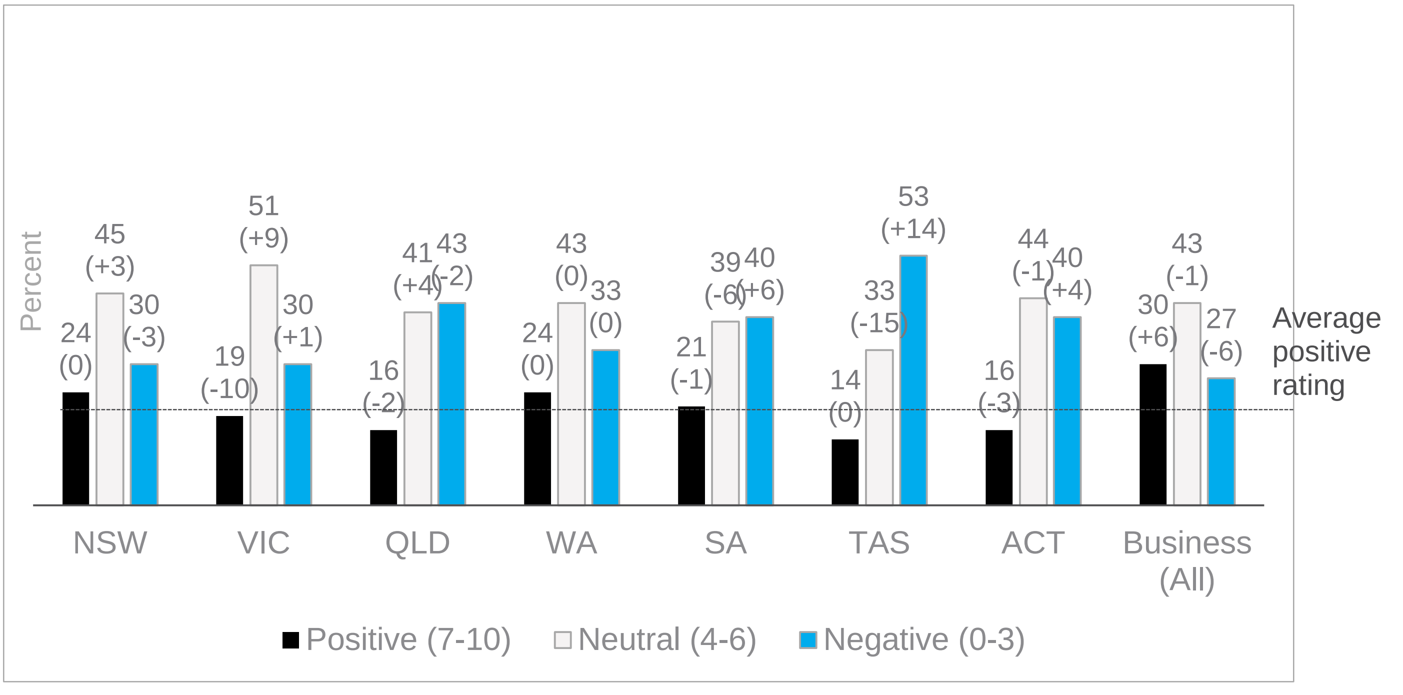
Confidence in the future value for money

Most consumers still do not believe that the market will deliver better value for money, and the only increase is amongst small business consumers.

- 30% of small business consumers in this survey say that they are confident that the market will deliver better value for money for consumers like them, up 6% on the last survey.
- There is, however, a 10% fall amongst Victorian household consumers, with 19% saying they are confident the market will deliver better value for money.

"How confident do you feel that the energy market will provide better outcomes for you in 5 years, in terms of value for money? By 'market' we mean the energy industry and energy regulators"

0-10 scale, 0='not at all confident', 10='very confident'



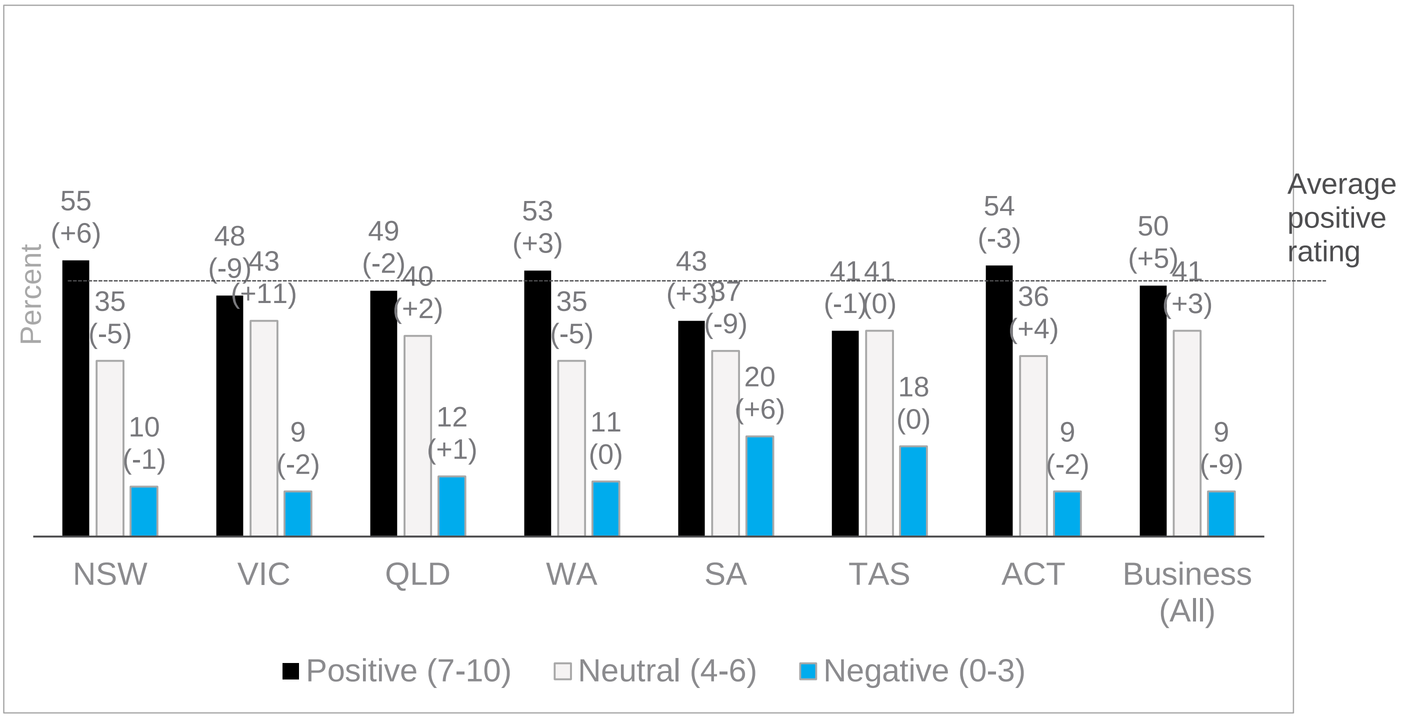
Confidence in future reliability

The proportion of consumers expressing confidence that the market will deliver increased reliability was down for some groups and up for others.

- There were increases for small business (up 5% to 50%) and for NSW household consumers (up 6% to 55%).
- The proportion of Victorian household consumers in this survey confident that the market will deliver greater reliability is, however, 9% lower than in the last survey.

"How confident do you feel that the energy market will provide better outcomes for you in 5 years, in terms of reliability of power supply? By 'market' we mean the energy industry and energy regulators"

0-10 scale, 0='not at all confident', 10='very confident'



Activity

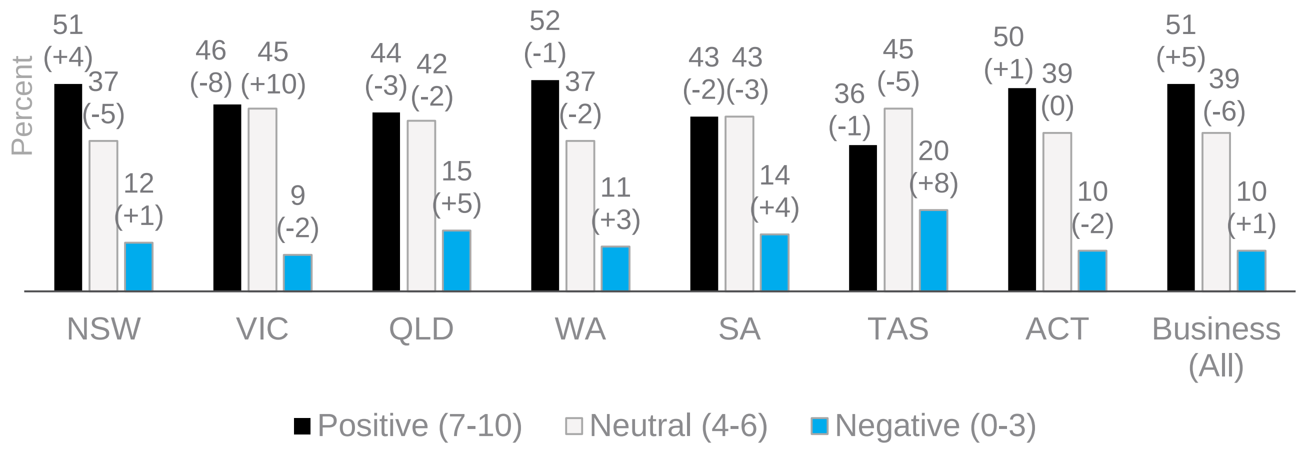
Confidence in future technology

The proportion of consumers expressing confidence that the market will deliver technological advances to manage energy costs was down in all states except NSW and among small businesses.

- There were increases for NSW (up 4% to 51%) and small business consumers (up 5% to 51%).
- The largest decreases in confidence were in Victoria (down 8% to 46%) and Queensland (down 3% to 44%).

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 technological advances to manage your energy supply and costs?

0-10 scale, 0='not at all confident', 10='very confident'



Uptake of technologies

More consumers report they are considering technologies to manage the cost of electricity.

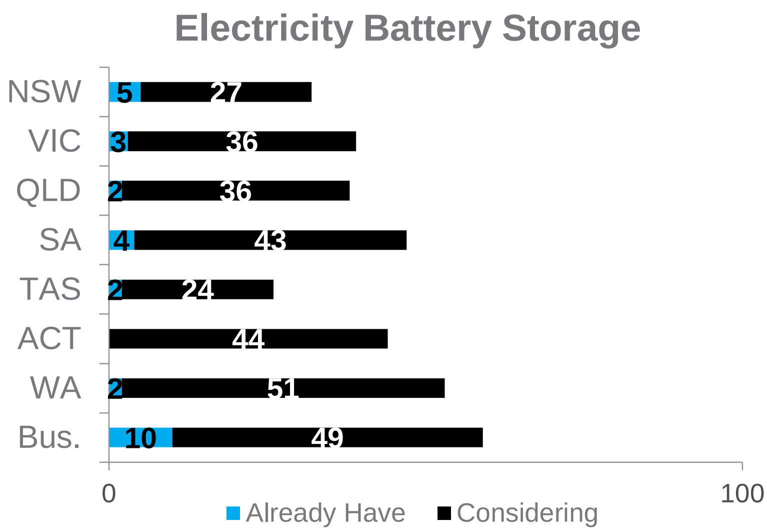
- The proportion saying they are considering rooftop solar panels is up 12% in Western Australia and up 5% in Victoria.
- There are increases in the proportions considering electricity battery storage in South Australia (up 7%), Western Australia (up 6%) and in Victoria (up 5%).
- The proportion claiming to be considering energy efficient appliances is up 8% in Queensland and up 6% in NSW.

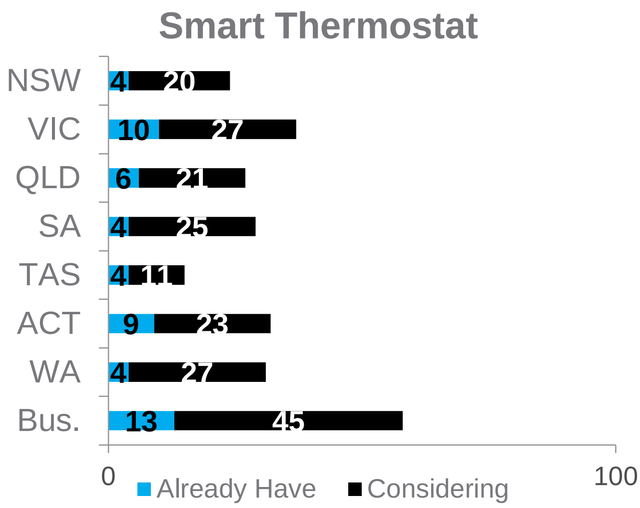
See following pages for charts

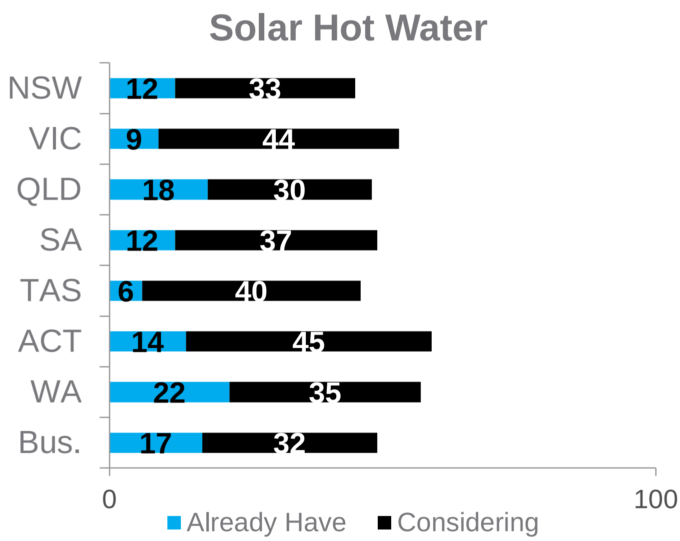
Activity

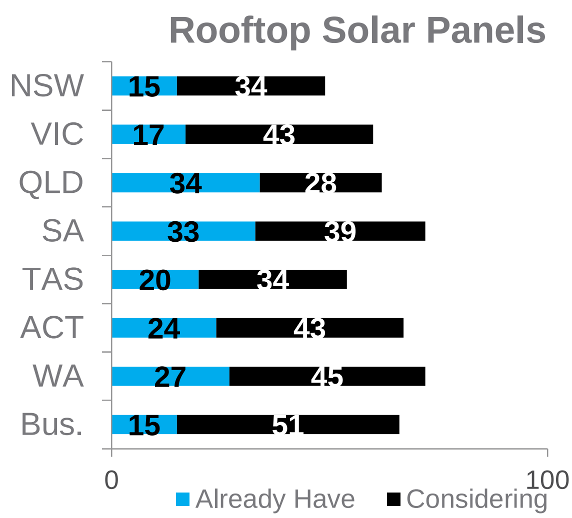
What people are thinking about investing in technology

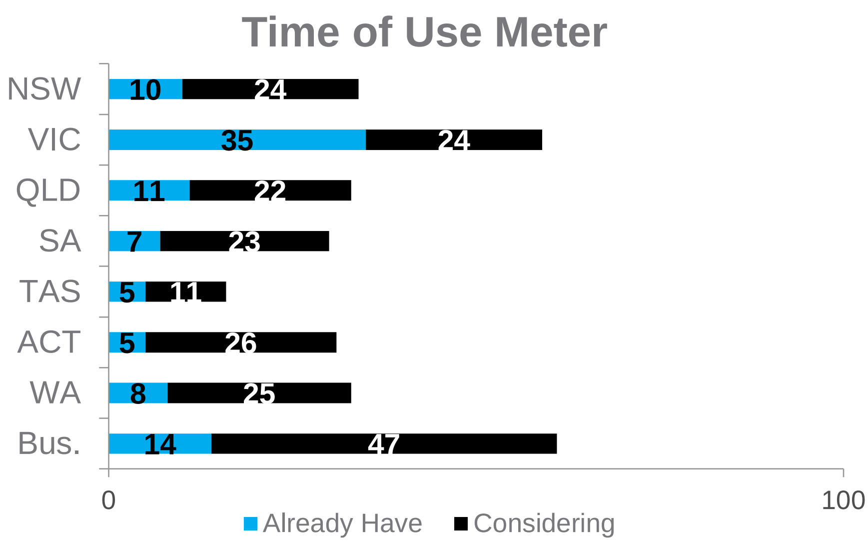
Do you already have or are you considering purchasing or using any of the following technologies to manage the cost of electricity in your household / business?










Time of Use Meter
NSW
VIC
QLD
SA
TAS
ACT
WA
Bus.
10
24
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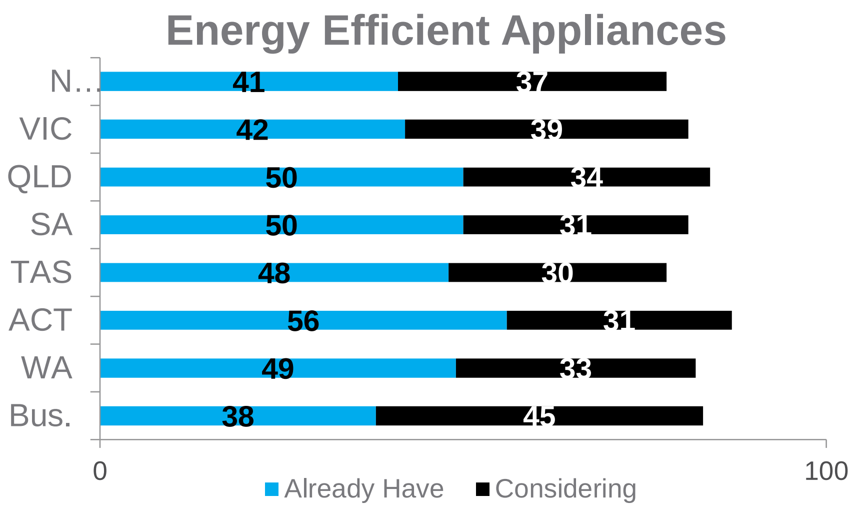
Already Have
Considering


Energy Efficient Appliances
N…
VIC
QLD
SA
TAS
ACT
WA
Bus.
41
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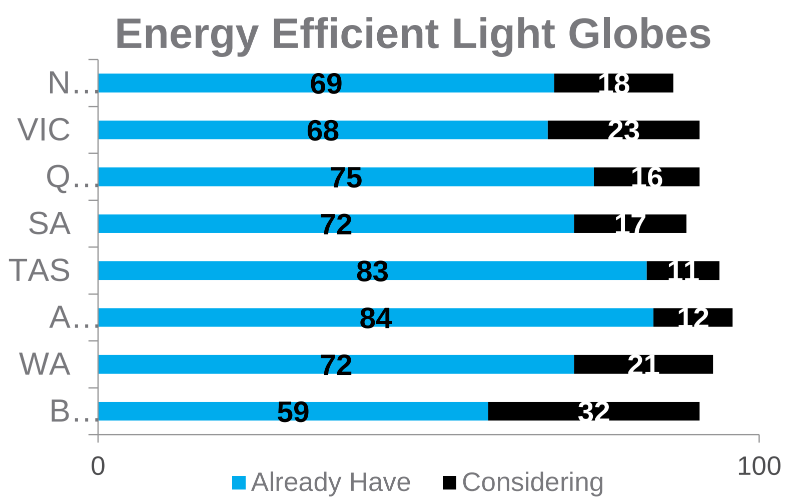

Energy Efficient Light Globes
N…
VIC
Q…
SA
TAS
A…
WA
B…
69
18
68
23
75
16
72
17
83
11
84
12
72
21
59
32
0
100
Already Have
Considering

Consumers who considered switching in the last 3 years

Consumers were asked whether they had considered switching in the last 3 years.

- The proportions were highest in those states where retail price deregulation has been removed in recent years – 60% in Victoria, 57% in NSW, 55% in SA and 46% in Queensland (where electricity price regulation was removed on 1 July 2016).

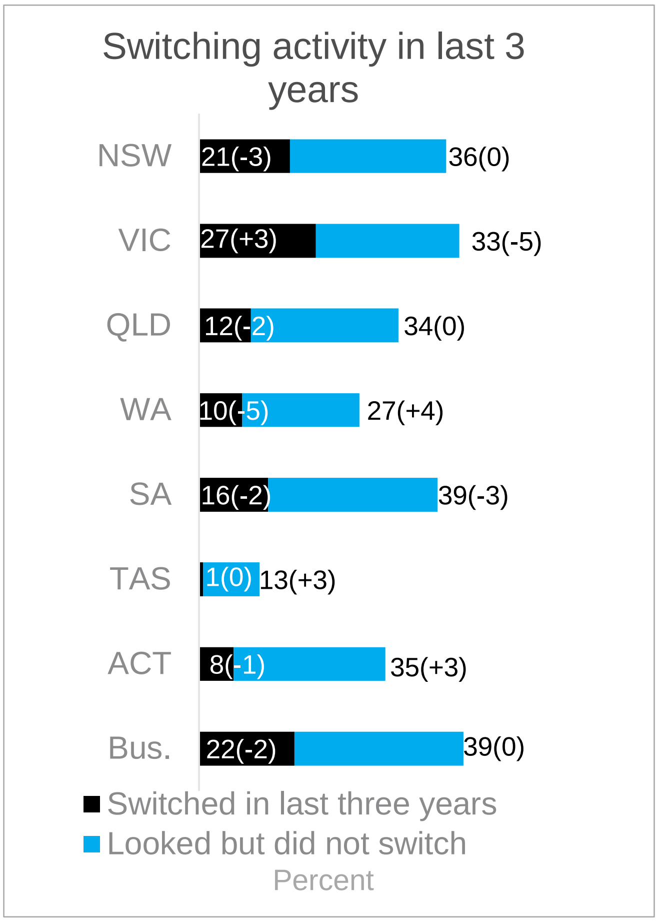
There were small changes in the proportions of consumers that say they switched providers or plans in the last 3 years.

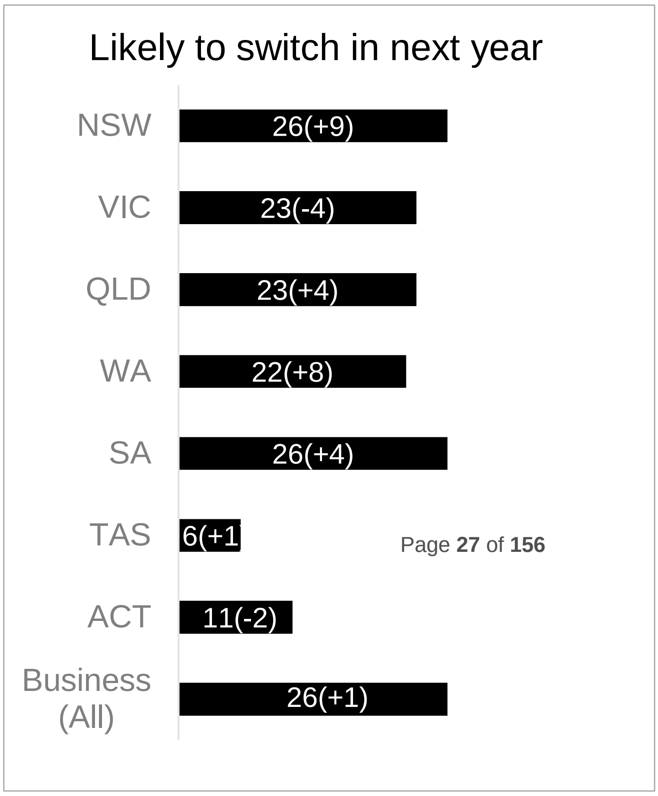
- 27% In Victoria, where switching rates were highest, there was an increase in the proportion of household consumers that had switched in the last three years, up 3% on the last survey.

A significant proportion of households did not switch or consider switching in the last 3 years.

- 40% of Victorian consumers did not switch or consider switching in the last three years (up 2%). This is the lowest amongst all states.
- 86% of Tasmanian consumers did not switch or consider switching in the past three years (down 2%). This is the highest amongst all states.

The proportion of consumers likely to switch in the next year generally rose, except in Victoria and the ACT.





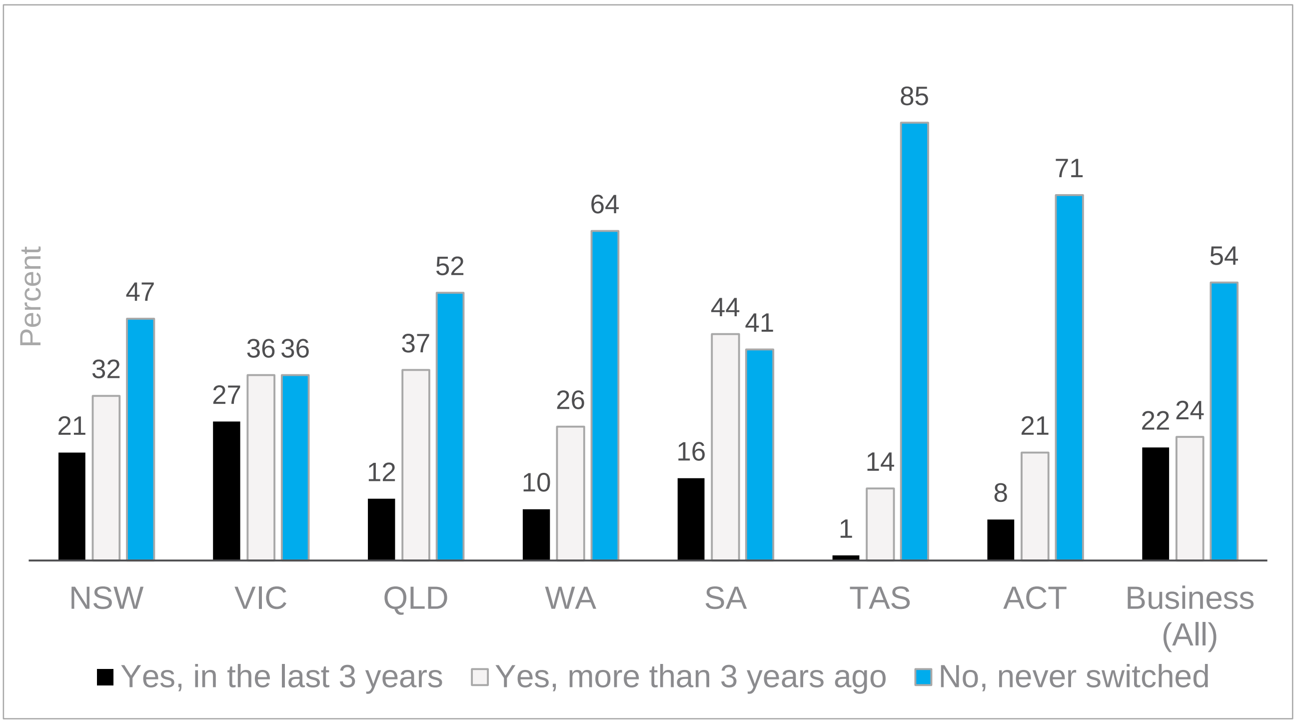
Activity

Switching behaviour

Substantial proportions of household consumers report that they have never switched energy companies or plans.

- 85% of Tasmanians say they have never switched energy companies or plans, as do 71% of ACT consumers.
- On the other hand, 63% of Victorians, 60% of South Australians and 53% of NSW household consumers report that they have switched at some point.
- It should be noted that these figures will include some people who have lived in other states or territories. For example, some of the ACT consumers who have switched may have done so when living in NSW or Victoria, while some of the Victorian consumers who report never having switched may have lived for extended periods in Tasmania or ACT.

"Have you ever switched energy companies or energy plans?"



Consideration of the environment

Environmental consciousness up in some states, but down in others

- The biggest increases in those likely to say that environmental concerns had a significant impact on their decisions relating to energy products and services were in Queensland (up 5%) and WA (up 5%)
- Unlike other states, ACT consumers were less likely to say that concern for the environment had a significant impact on their decisions regarding energy products and services (down 7%), and were more likely to say it had no effect at all (up 6%).

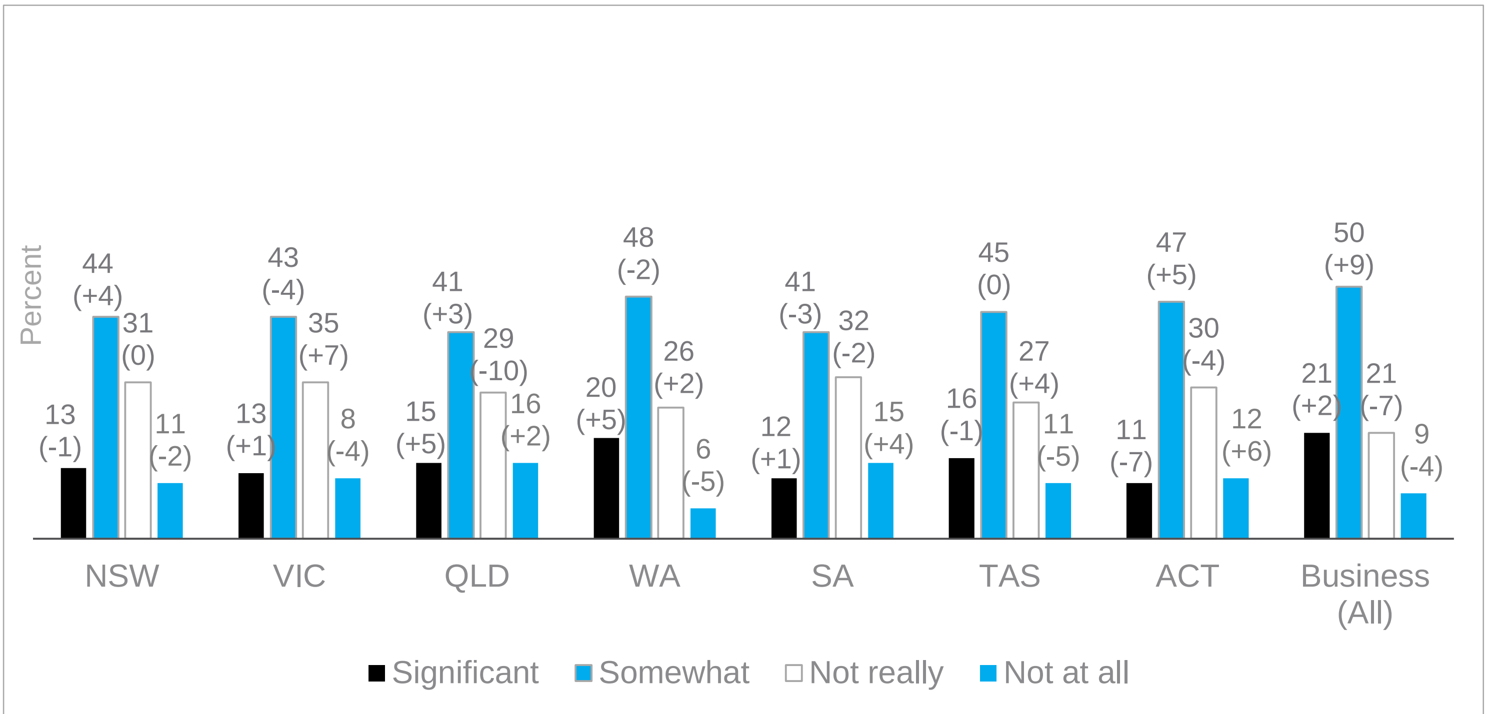
"How much does your own personal concern about the environment impact on your decision about energy products and services?"

a It is a significant factor – I am very concerned about the environment and it is the main consideration

b It is a factor – I am concerned about the environment and it is one consideration

c It is not really a factor

d Not at all a factor



Awareness of ECA

Awareness of Energy Consumers Australia is generally up slightly.

- The largest change is in South Australia, with 15% claiming to be familiar with the organisation (up 6%).
- There is also a 4% increase (to 20%) amongst Victorian household consumers, and a 5% increase amongst small business consumers (now 25%).

"How familiar are you with an organisation called Energy Consumers Australia?"

Small business

Satisfaction

Overall satisfaction

There has been a moderate increase in the number of small business consumers who say they are satisfied with the provision of their electricity and gas services.

- 65% rate their satisfaction as 7 or higher out of 10, up 4% on the last survey.
- Only 4% rate their satisfaction as 3 or lower (down 1%).

The increase in overall satisfaction has been accompanied by an increase in satisfaction with the level of competition.

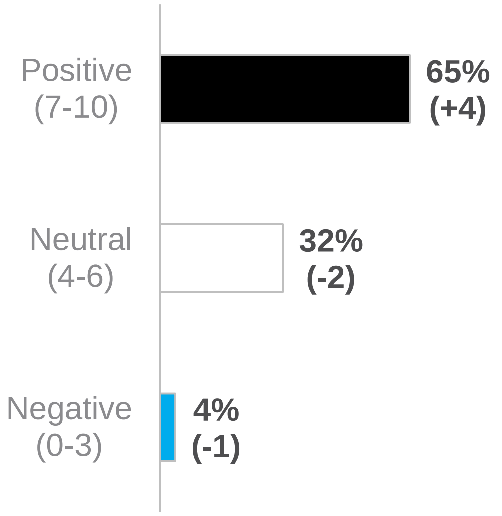
- 49% of this survey respondents are positive, up 6% since the last survey.
- The proportion of small business consumers who give negative ratings is down 5% to 15%.
- Much of the change has come from small business consumers with 19 or fewer employees. 47% of this group now say they are satisfied, up 8%.

The increase is also greater amongst those who feel confident in their own ability to make choices.

- 84% of those who feel confident about their own abilities say they are satisfied, up 9% on the last survey.
- 65% of those who feel highly confident are satisfied with the level of competition, up 9%.

Overall satisfaction

How satisfied are you with the provision of your electricity and gas services overall in the last 6 months?



Satisfaction with competition

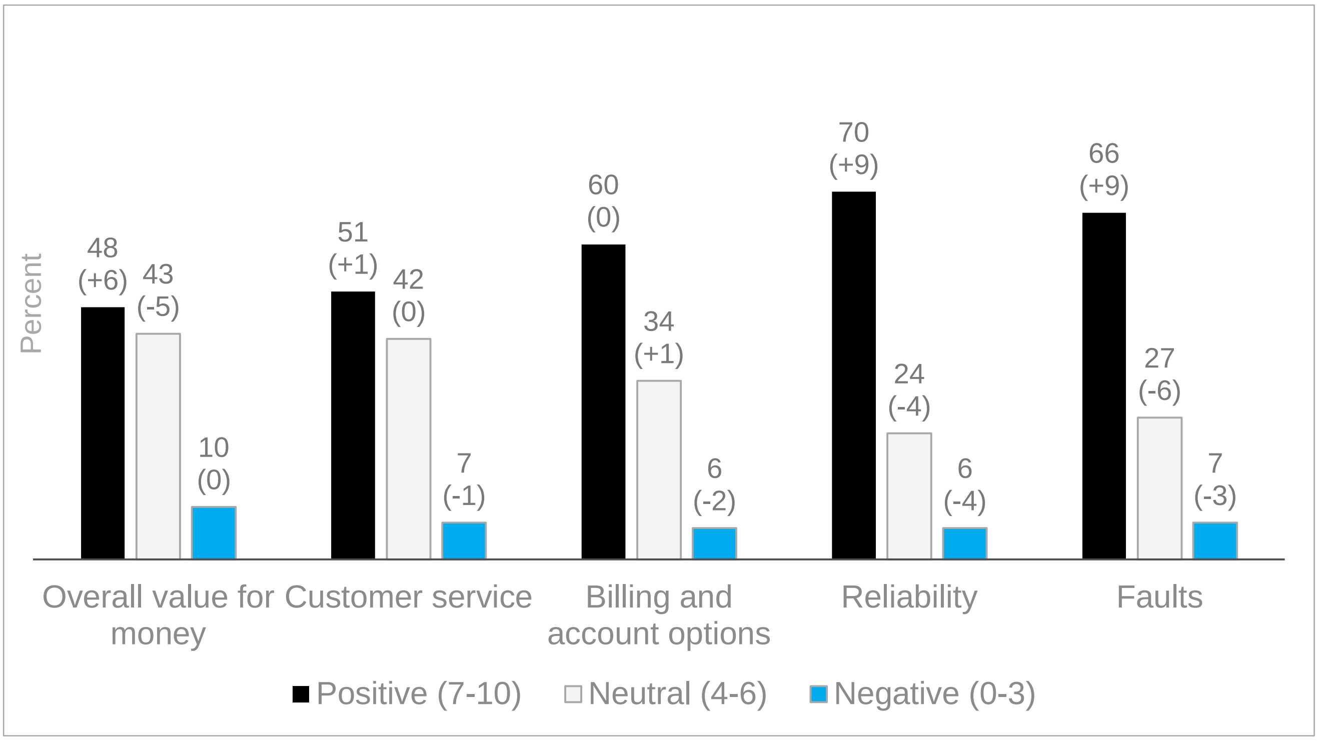
How satisfied are you with the level of competition in the energy market in your area?

Electricity – satisfaction with value for money & reliability

The proportion of small business consumers saying they are satisfied with the value for money and reliability of electricity has increased.

- 48% of small business consumers are satisfied with the overall value for money they get for electricity, up 6% since the last survey. After being behind household consumers on this measure in the last survey, small business consumers are now more likely than household consumers to say they are satisfied.
- 70% are satisfied with the reliability of electricity services (up 9%)
- 66% are satisfied with the time it took to resolve faults (also up 9%)

"How would you rate the [attribute]"
0-10 scale, 0='very poor', 10='excellent'



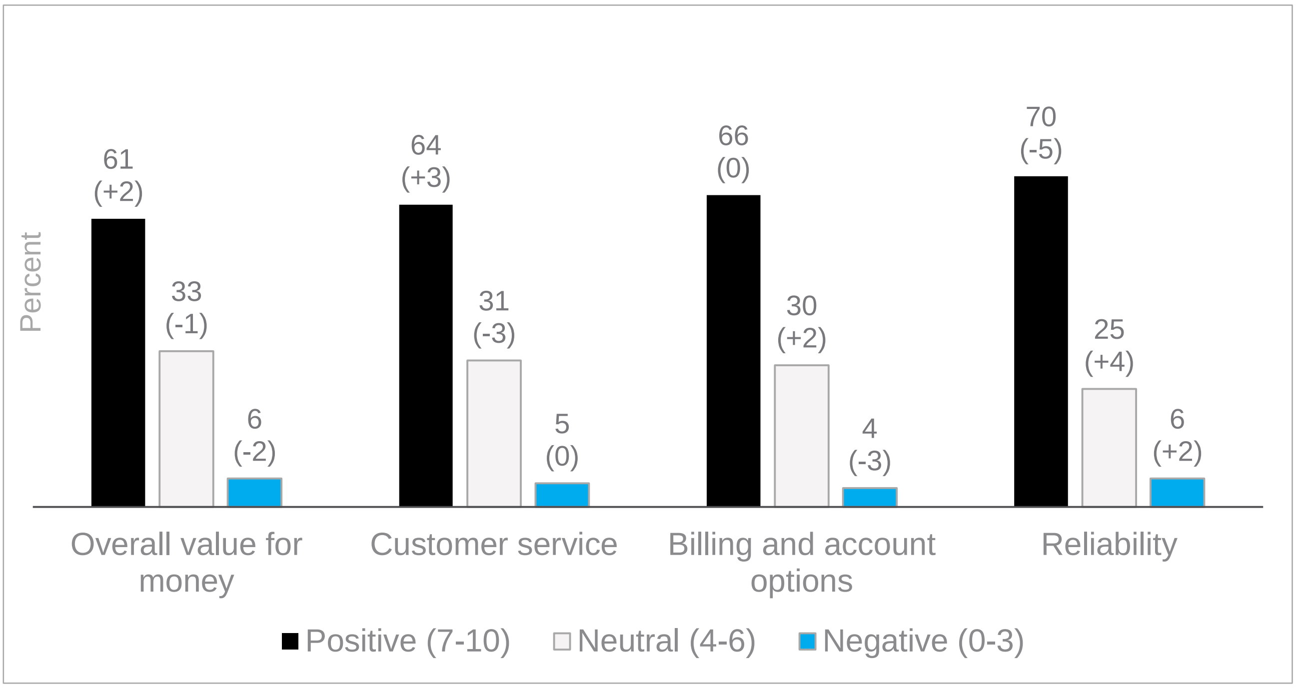
Satisfaction

Satisfaction with gas

Small business consumers' ratings for gas present a mixed picture.

- 61% are satisfied with the customer service they get for gas, up 3% since the last survey.
- 70% are satisfied with the reliability of gas services, down 5%.

"How would you rate the [attribute]"
0-10 scale, 0='very poor', 10='excellent'



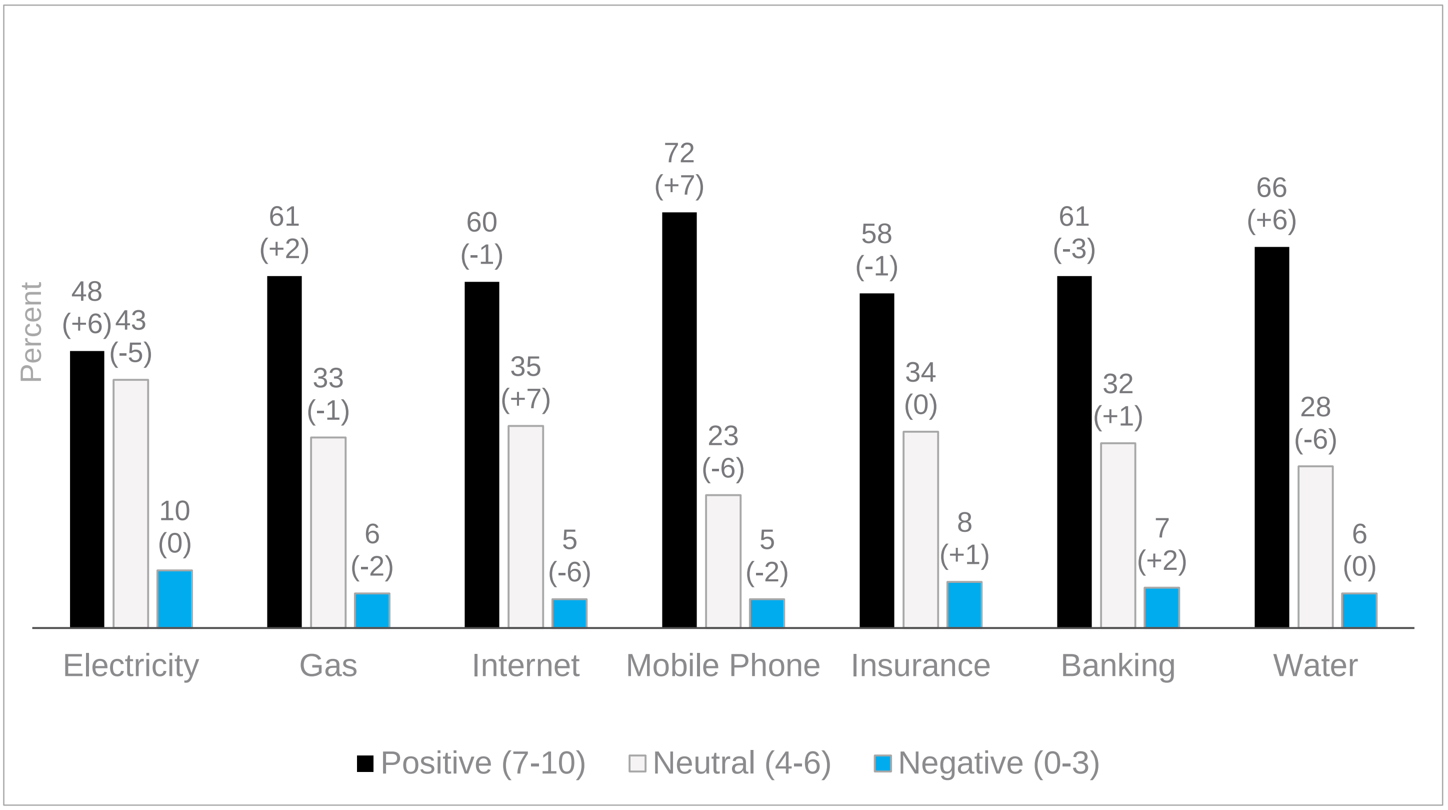
Base: Small business consumers with gas (n=207)

Satisfaction with utilities

Although in some cases the gap has narrowed, small business consumers continue to rate electricity well behind other services in terms of value for money.

- The 6% increase in the proportion satisfied with the value for money of electricity puts it closer to internet, insurance and banking than was the case in the last survey, but 10% to 13% behind.
- The proportion positive about the value for money of mobile phone services is up 7% to 72%, while the proportion positive about the value for money of water is up 6% to 66%.

"How would you rate the [attribute]"
0-10 scale, 0='very poor', 10='excellent'



Confidence in information and tools

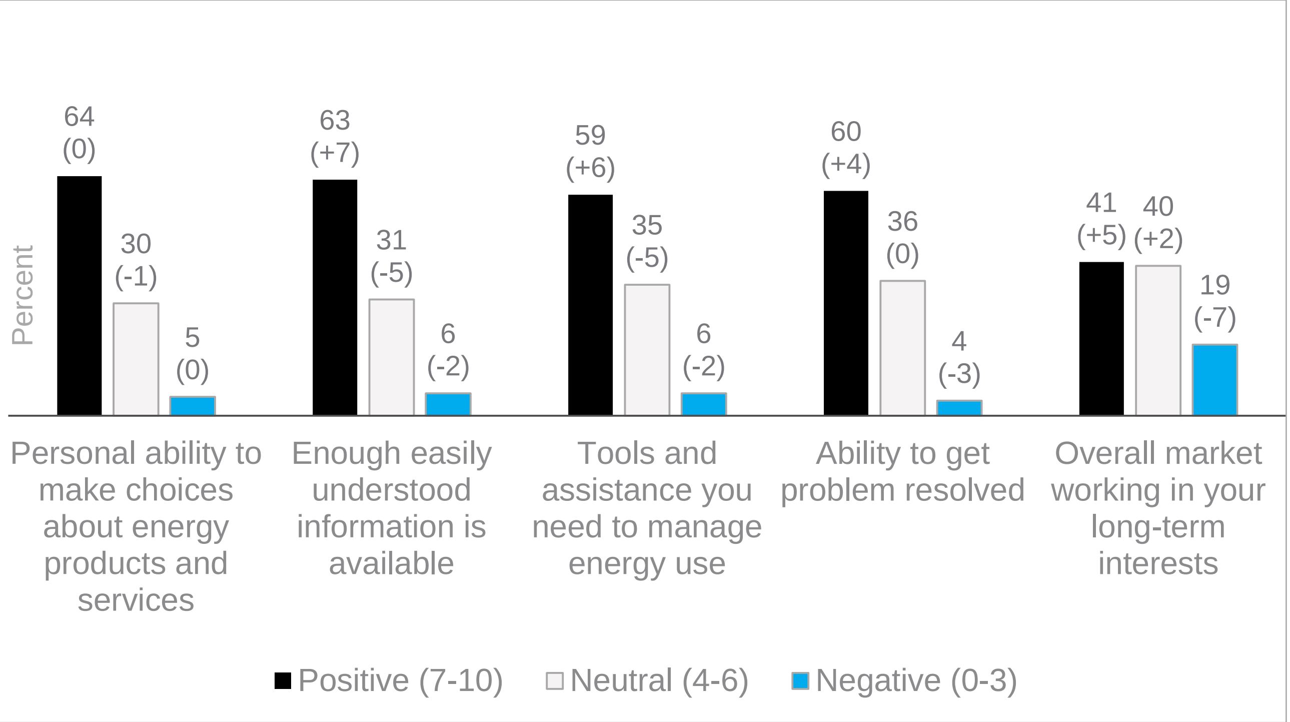
Confidence in personal ability to make choices about energy products and services is unchanged, but there has been an increase in confidence in both information and tools available to help people make those choices.

- 63% of small business consumers say they are confident that there is enough easily understood information available (up 7%), while there is a 6% increase in the proportion saying that they are confident that tools and assistance is available (now 59%)

There is also an increase in the proportion who feel that the market is working in their long-term interests.

- 41% now say that they are confident in this, up 5% since the last survey.

How would you rate the following:
0-10 scale, 0='very poor', 10='excellent'



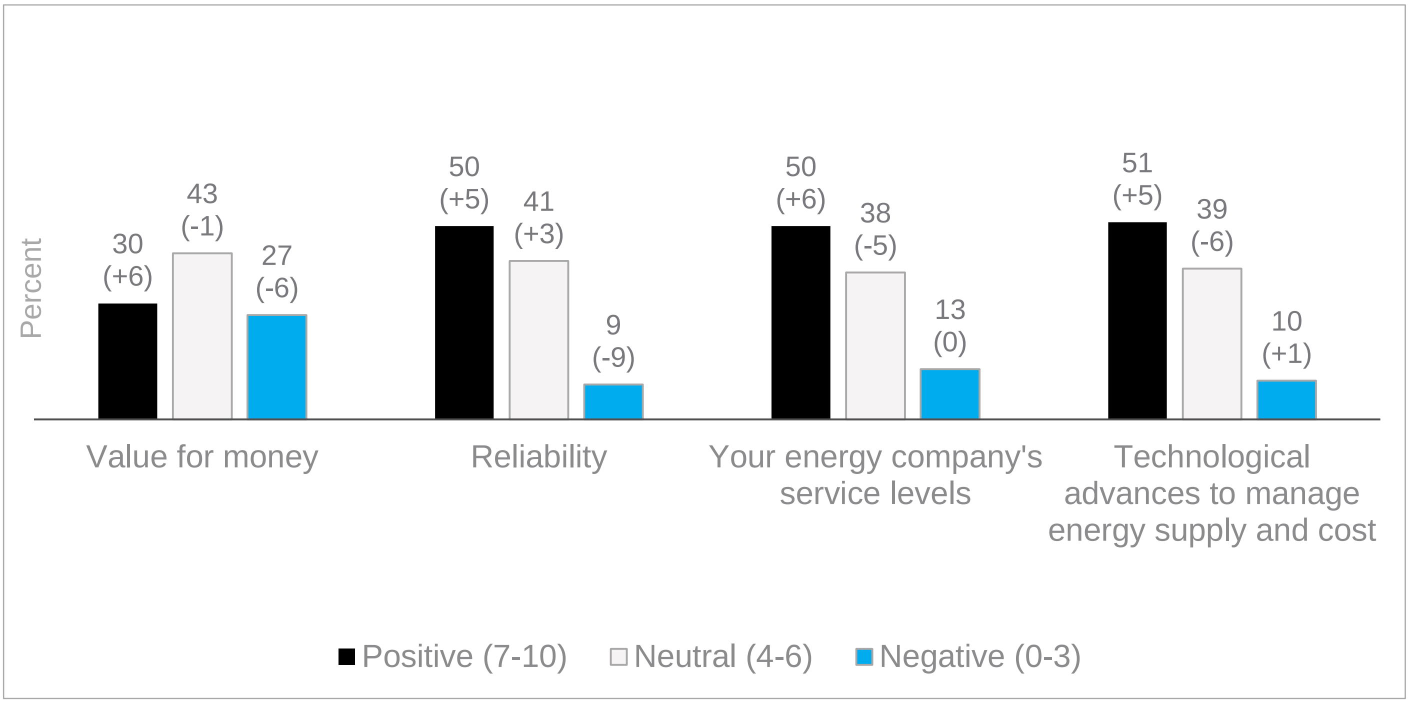
Confidence in long-term outcomes

Small business consumers in the latest survey were more likely to express confidence in the long-term outcomes for all four measures in this survey – value for money; reliability; service levels and technological advances.

- Although the proportion confident that the market will deliver better value for money in the long term remains fairly low (30%), it is up 6% since the last survey.
- There is also a 6% increase in the proportion confident of better outcomes in their energy company's service levels (now 50%), and 5% increases for both reliability and technological advances.

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…?

0-10 scale, 0='not at all confident', 10='very confident'



Activity

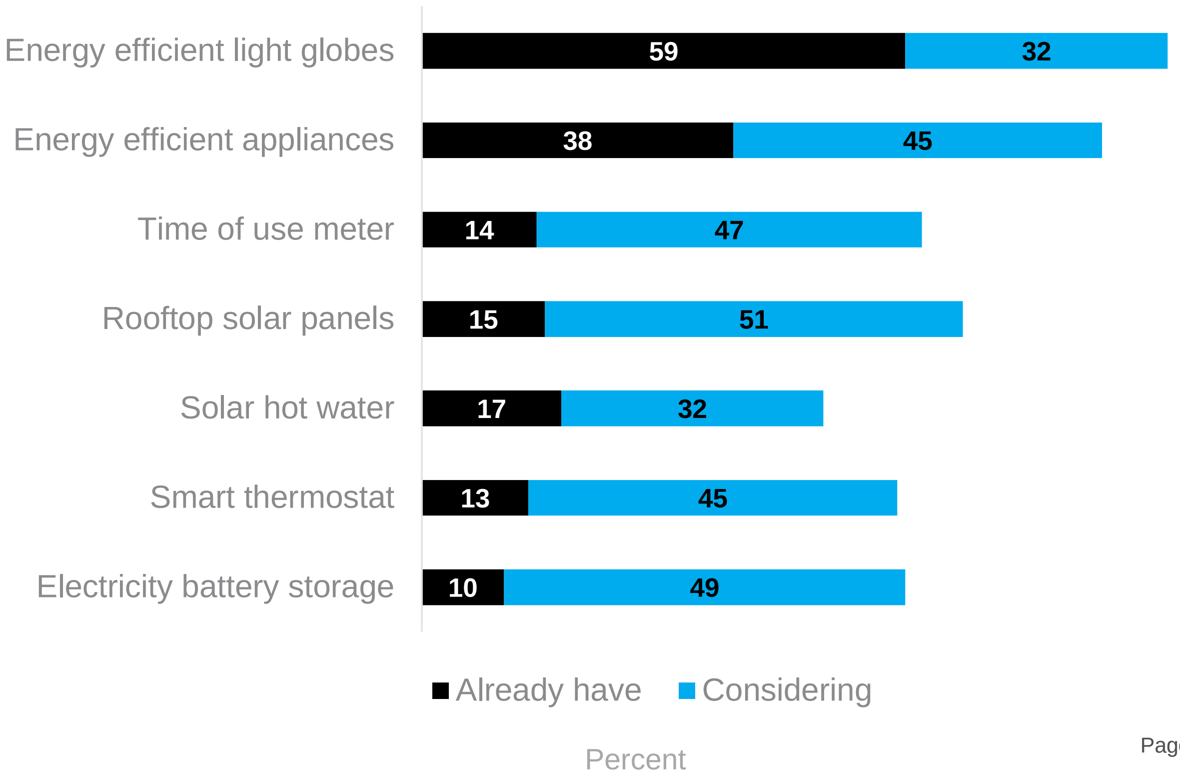
Uptake of technologies

Small business consumers in this survey were asked about the technologies they had invested in and were considering investing in at their business premises.

Those who worked from home or in businesses that did not have fixed premises skipped this question. There is clear potential to increase usage of rooftop solar panels, battery storage, smart thermostats and energy efficient appliances, with over 40% of small business consumers claiming to be considering each of these technologies.

The last survey asked about what they had in their households, so the results are not directly comparable for these questions. It should be noted, however, that the proportion considering each technology for their business in this is higher than the proportion considering the same technology for their household in the last survey for six of the seven technologies tested, with the only exception being solar hot water.

Do you already have, or are you considering purchasing or using any of the following technologies to manage the cost of electricity in your business?



Base: Small business consumers (n=163)

Activity

Switching behaviour

The proportion of small business consumers who say they have considered switching in the last three years is little different to the last survey.

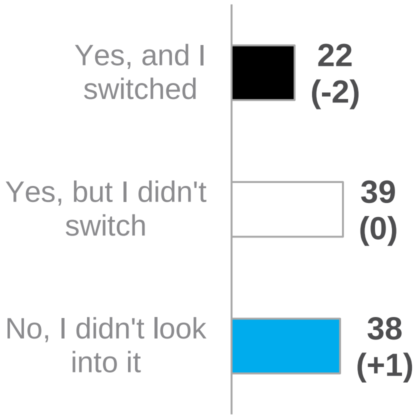
- 61% considered switching made up of 24% that say that they actually switched (up 2%), while 39% looked at doing so but did not (no change).

There is also little change in the proportion planning to switch in the next year.

- 26% say that they intend to switch, up 1% since March / April.

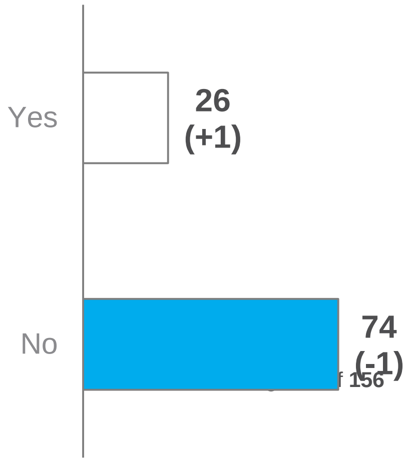
Previous behaviour

"Have you looked into or researched your options for switching energy companies or energy plans in the last 3 years?



Future Intentions

Do you intend to switch energy companies or energy plans in the next year?



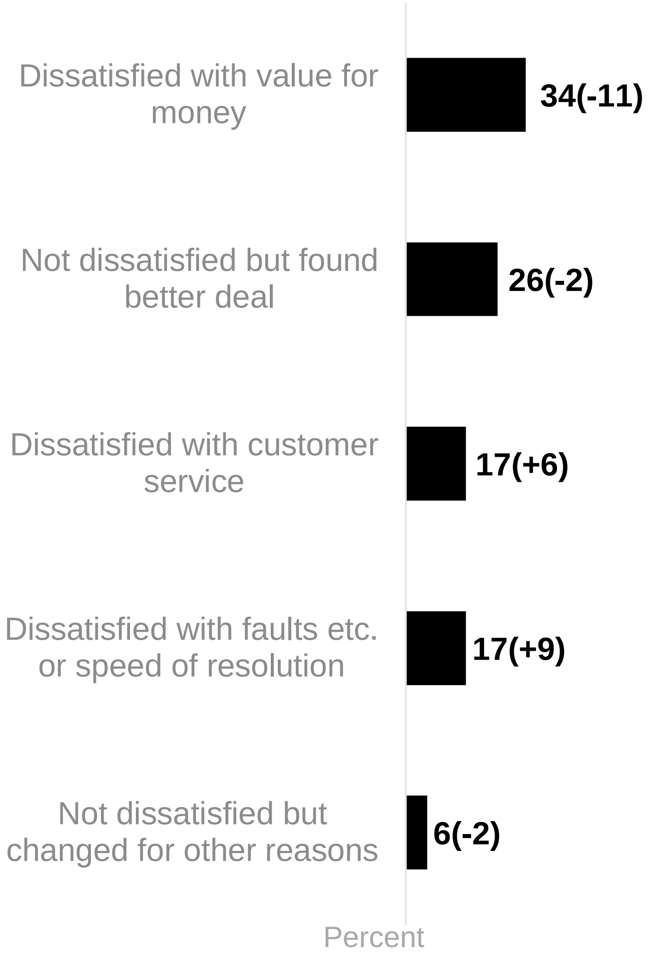
Activity

Reasons for considering switching

Value for money is the most commonly given reason for considering switching.

- 34% said that they considered switching because they were dissatisfied with the value for money they received, down 11% since the last survey.
- There have been increases in the proportions saying they considered switching because they were dissatisfied with customer service (up 6% to 17%) and with faults and the speed of resolution of those faults (up 9% to 17%).

Which of the following best describes your reasons for considering switching?



Base: Small business consumers who considered switching in the last 3 years (n=174)

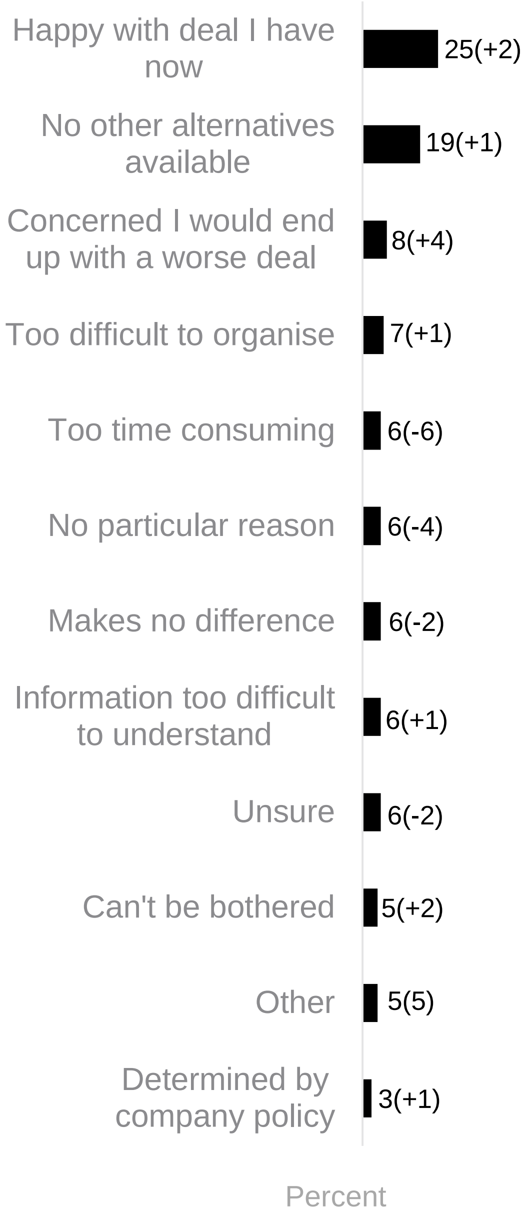
Activity

Reasons for not switching

The reasons given for not considering switching are essentially the same as in the last survey.

- 25% say that they are satisfied with the deal they have now (up 2%).
- 25% say that they had not looked at switching because there were no other alternatives available or that it made no difference (down 1%).
- 19% now say that the barriers are too high (too difficult, too time consuming or too difficult to understand), down 4%
- 8% now say they are concerned they would end up with a worse deal (up 4%).

Which of the following best describes your reasons for not considering switching?



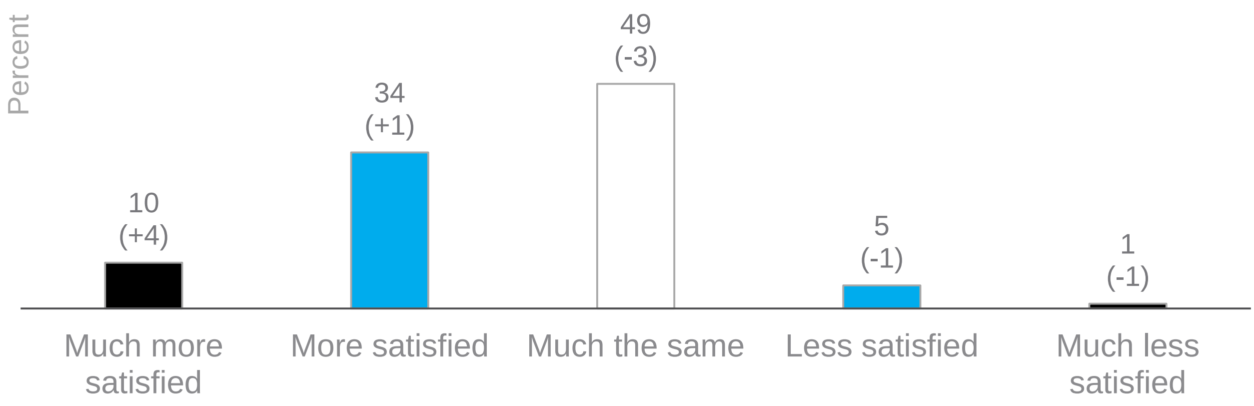
Base: Small business consumers who had not considered switching in the last 3 years (n=108)

Activity

Satisfaction after considering switching

44% of those who looked at options for switching energy companies or plans say that they are now more satisfied with the value for money they receive, up 5% since the last survey.

"After looking at options for switching energy companies or plans, would you say you are more satisfied, less satisfied or much the same with the value for money you are receiving, compared with before you looked at your options?"



Base: Small business consumers who considered switching in the last 3 years (n=174)

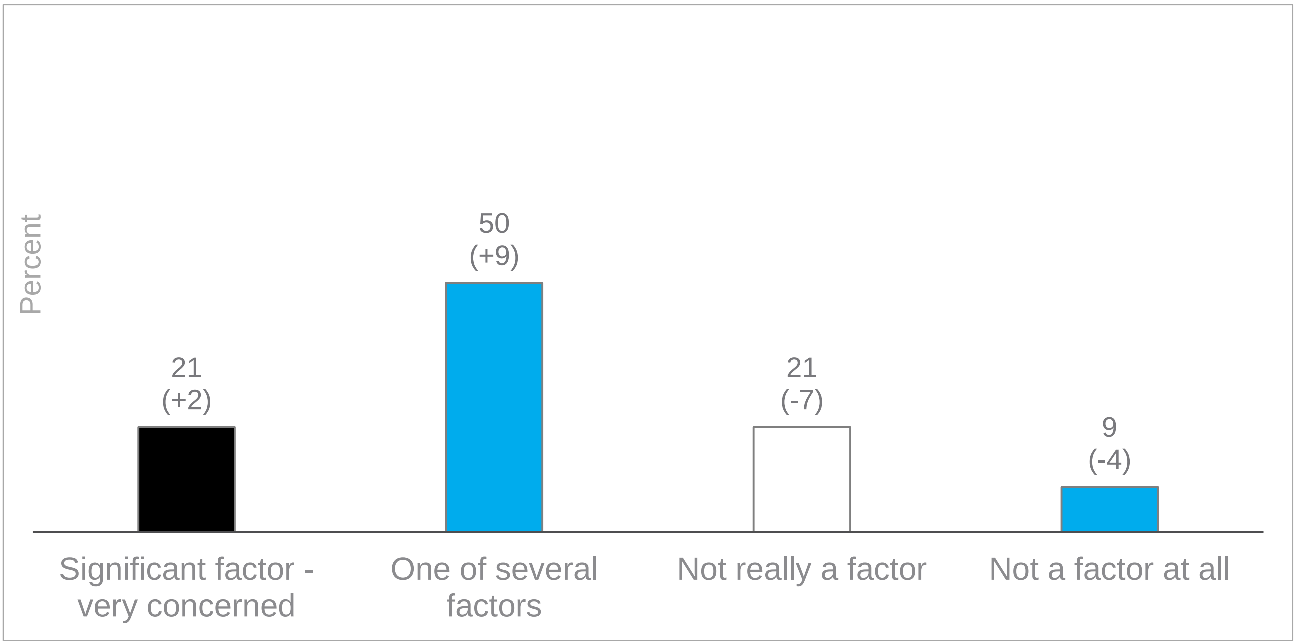
Activity

Consideration of the environment

The proportion of small business consumers saying that the environment is a factor they consider when making decisions about energy products and services is up 11% to 71%.

- This is mainly due to a 9% increase in the proportion saying that it is one of several factors they consider, while there is a 2% increase in the proportion saying it is the most important factor.

"How much does your own personal concern about the environment impact on your decisions about energy products and services?"



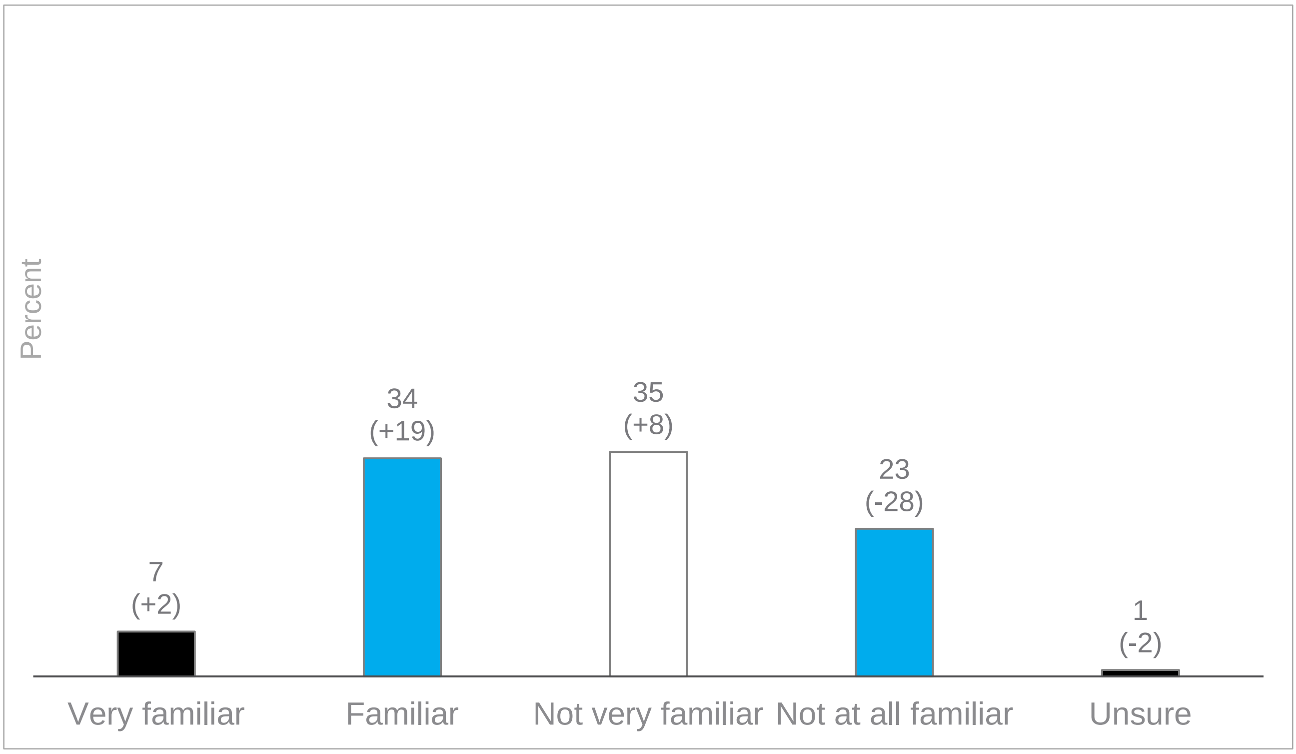
Other

Awareness of ECA

25% of small business consumers claim to be familiar with Energy Consumers Australia, up 5% since the last survey.

- 5% say that they are 'very familiar' (up 1%) and 19% are simply 'familiar' (up 4%).

"How familiar are you with an organisation called Energy Consumers Australia?"



New South Wales

Satisfaction

Overall satisfaction

NSW household consumers gave lower ratings than in the last survey for their overall satisfaction with the provision of electricity services.

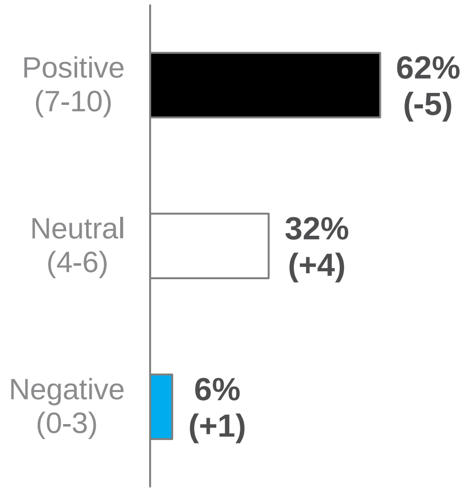
- 62% are satisfied, down 5% since March / April.
- 32% are neutral (up 4%), while 6% are negative (up 1%).

There is little change, however, in satisfaction with the level of competition in NSW.

- 49% are positive (up 1%).

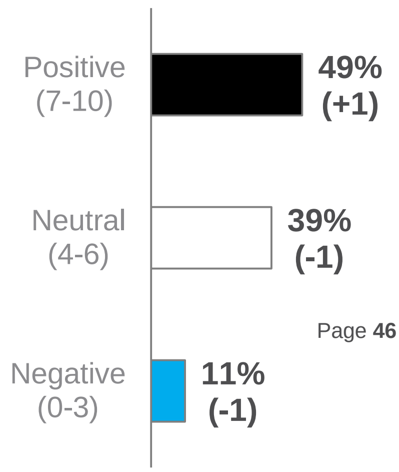
Overall satisfaction

How satisfied are you with the provision of your electricity and gas services overall in the last 6 months?



Satisfaction with competition

How satisfied are you with the level of competition in the energy market in your area?



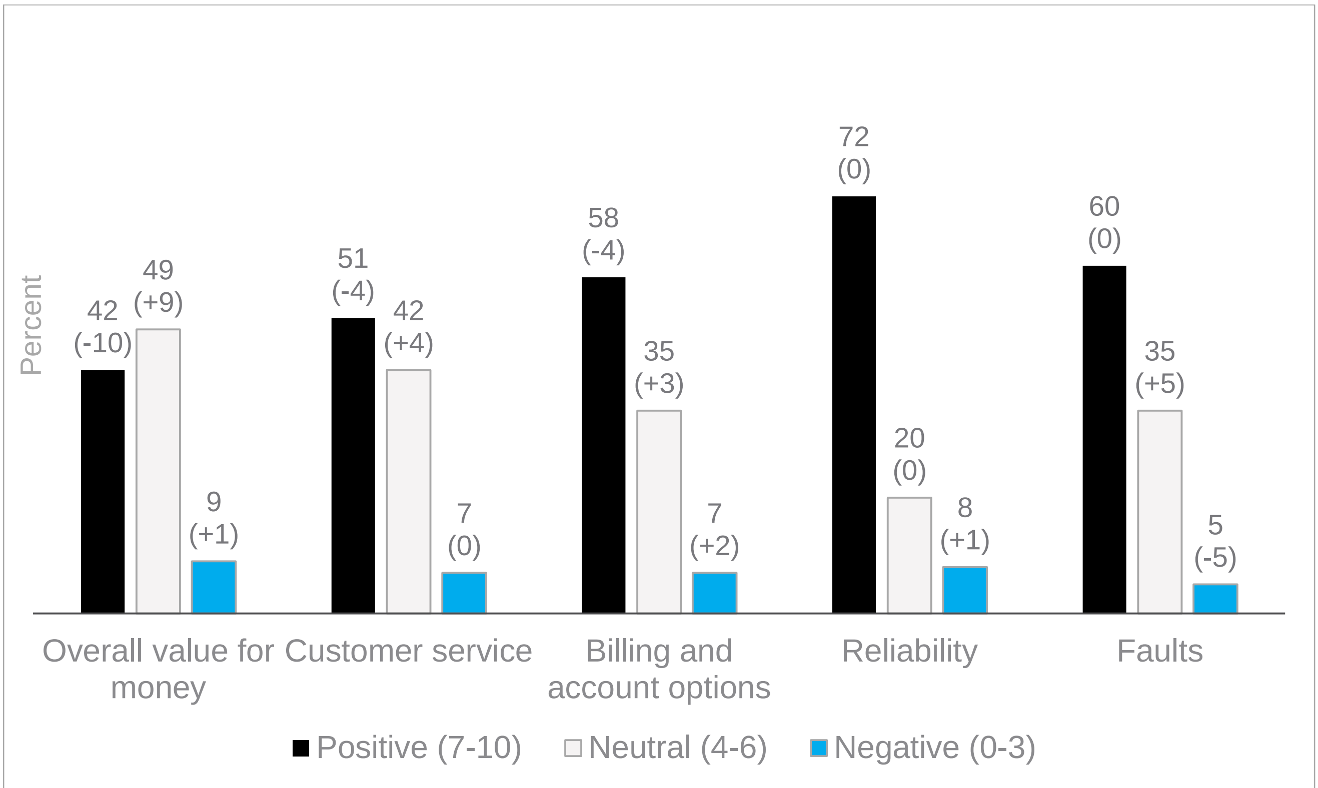
Satisfaction

Satisfaction with electricity

Ratings for the value for money of electricity from NSW household consumers are substantially lower than in the last survey, and there are smaller drops in satisfaction with customer service and billing.

- 42% of NSW residents now say they are satisfied with the value for money of electricity, down 10%.
- 51% are satisfied with customer service (down 4%) and 58% are satisfied with the billing and account options.

"How would you rate the [attribute]"
0-10 scale, 0='very poor', 10='excellent'



Satisfaction

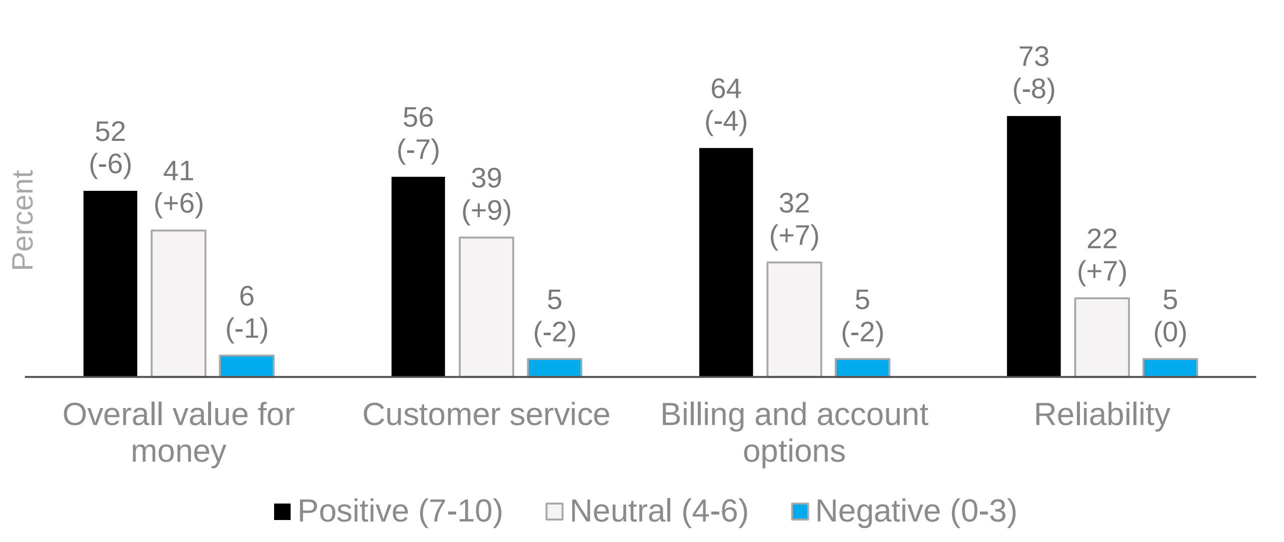
Satisfaction with gas

NSW household consumers in this survey gave lower ratings than in the last survey for all four measures for gas.

- 52% are satisfied with the value for money they get for gas, down 6% since March / April.
- 56% are satisfied with their gas company's customer service, down 7%).
- 73% say they are satisfied with the reliability of gas (down 8%).
- 64% are satisfied with the billing and account options (down 4%).

These falls may be a seasonal effect, reflecting increased usage of gas in the winter months.

"How would you rate the [attribute]"
0-10 scale, 0='very poor', 10='excellent'



Base: New South Wales consumers with gas (n=250)

Satisfaction

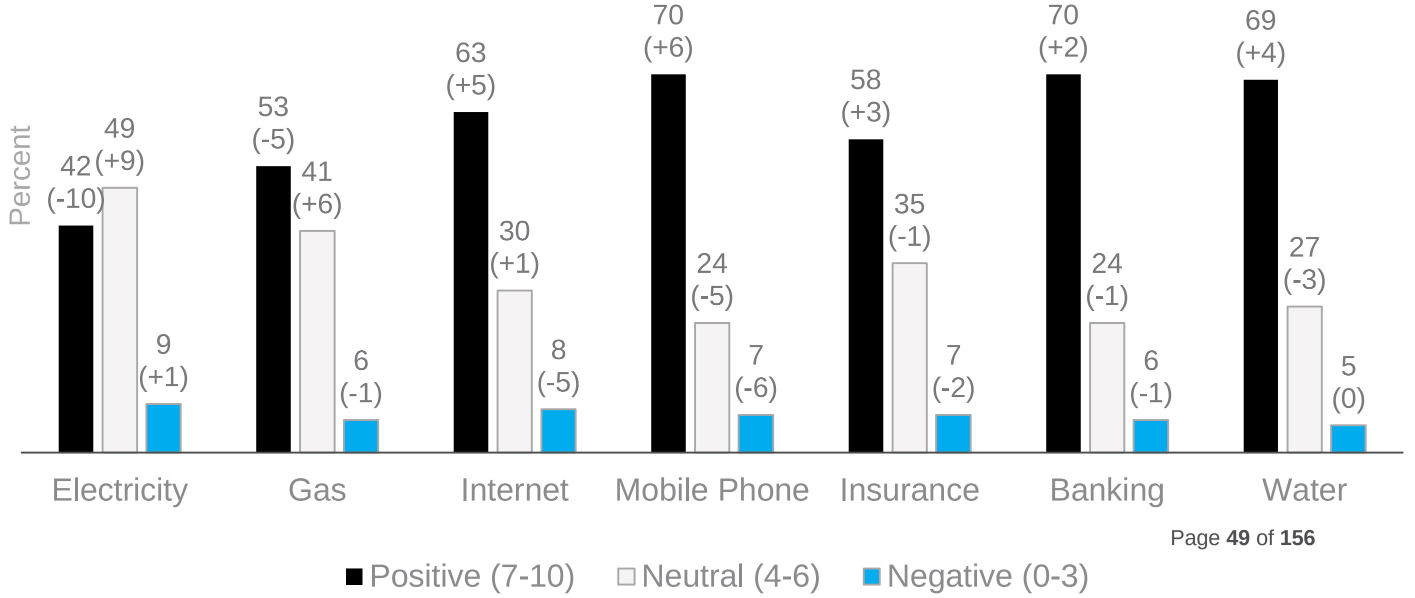
Satisfaction with utilities

While value for money ratings for electricity and gas from NSW household consumers have dropped, value for money ratings for other services have increased.

- There has been a 6% increase, for example, in the proportion of NSW household consumers who say that they are satisfied with the value for money of their mobile phone (now 70%), and a 5% increase in the percentage who say they are satisfied with the value for money of their internet service.
- Whereas in the previous survey 12% more NSW household consumers said they were satisfied with the value for money of their mobile phone service than their electricity, the gap between mobiles and electricity is now 28%.

This again may be a seasonal effect, reflecting increases in usage of gas and electricity over winter, while usage of other utilities changes less.

"How would you rate the [attribute]"
0-10 scale, 0='very poor', 10='excellent'



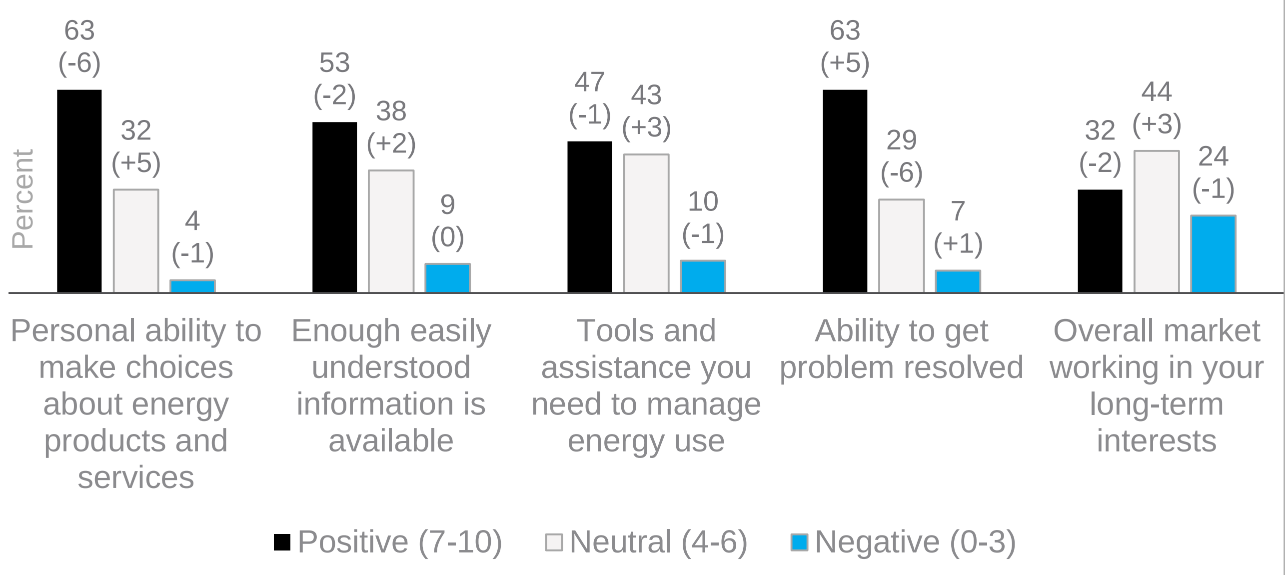
Confidence

Confidence in information and tools

NSW household consumers in this survey are less likely than those in the previous survey to say they are confident in their own ability to make choices, but more likely to say they are confident in their ability to get problems resolved.

- 63% say they are confident about their personal ability to make choices about energy products and services (down 6%).
- Another 63% say that they are confident in their ability to get problems resolved (up 5%).

How would you rate the following:
0-10 scale, 0='very poor', 10='excellent'



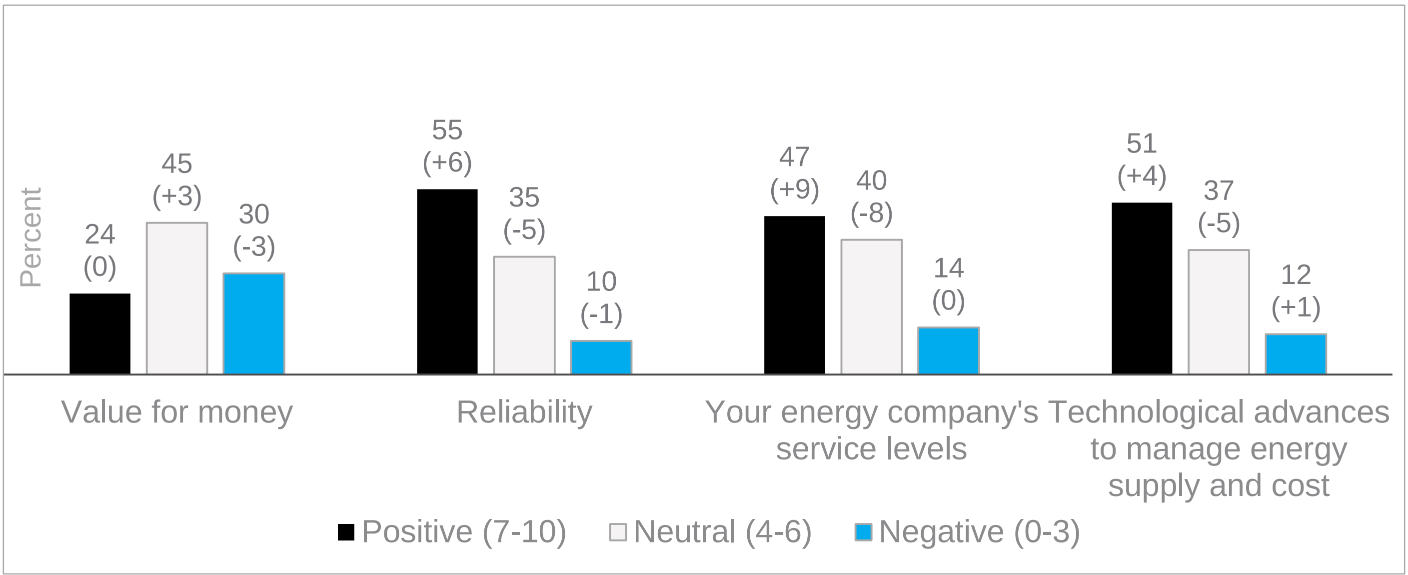
Confidence in long term outcomes

Despite the lower satisfaction with value for money, NSW household consumers in this survey are more likely than participants in the last survey to say they are confident that the market will deliver better outcomes in other areas.

- Given that the proportions satisfied with the current value for money of electricity and gas have fallen, it can be no surprise that the proportion confident that the market will deliver better value for money in the future has not increased. 24% of NSW household consumers are confident of better value for money in the future, unchanged from the last survey.
- The proportions confident in better outcomes in other areas have increased, with the largest change being a 9% increase in the proportion confident of better outcomes in terms of service levels.

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:

0-10 scale, 0='not at all confident', 10='very confident'



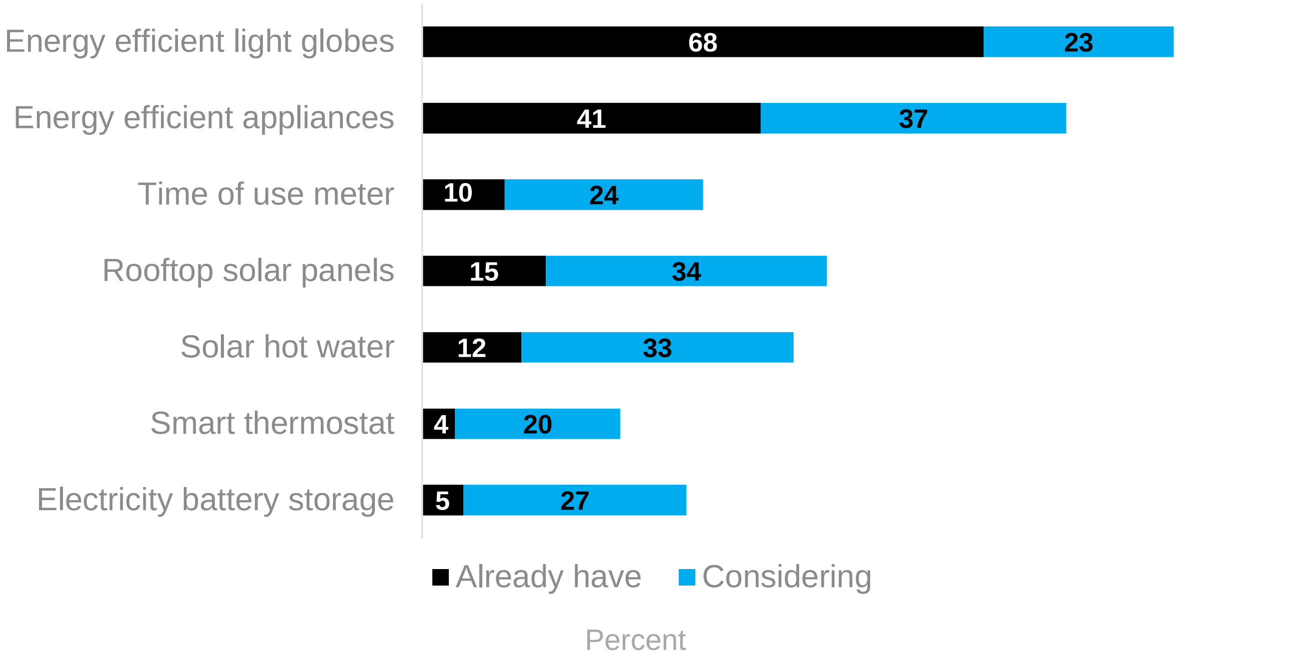
Activity

Uptake of technologies

NSW household consumers in this survey were more likely than those in the previous survey to say they were considering energy efficient appliances, and less likely to say they are considering electricity battery storage.

- 37% say that they are considering energy efficient appliances (up 6%), although this is countered by a 12% decline in the proportion saying that they already had such appliances. This may simply reflect a difference in the two samples, or a different understanding of what qualifies as an energy efficient appliance.
- 27% now say they are considering battery storage, although this 6% decline is balanced by a 3% increase in the proportion claiming to already have it.

Do you already have, or are you considering purchasing or using any of the following technologies to manage the cost of electricity in your household?



Activity

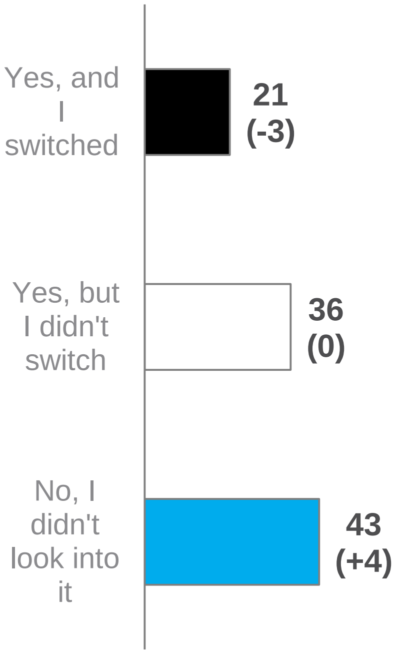
Switching behaviour

57% of NSW household consumers in this survey say that they have at least considered switching energy companies or energy plans in the last three years, down 3% since March / April.

- This drop is from those who report having actually switched (down 3% to 21%).

Previous behaviour

“Have you looked into or researched your options for switching energy companies or energy plans in the last 3 years?



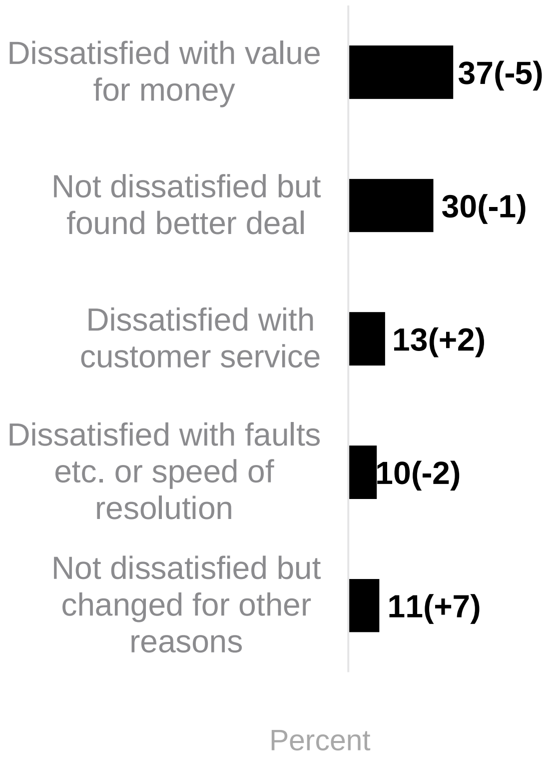
Activity

Reasons for considering switching

The proportion saying that the main reason they considered switching was dissatisfaction with value for money is down, but it remains the main reason.

- 37% say that the main reason is that they were dissatisfied with the value for money, down 5%.
- 30% say that they were not dissatisfied but simply found a better deal.
- The main increase is for ‘not dissatisfied but changed for other reasons’ – up 7% to 11%.

Which of the following best describes your reasons for considering switching?



Base: New South Wales household consumers who considered switching in the last 3 years (n=230)

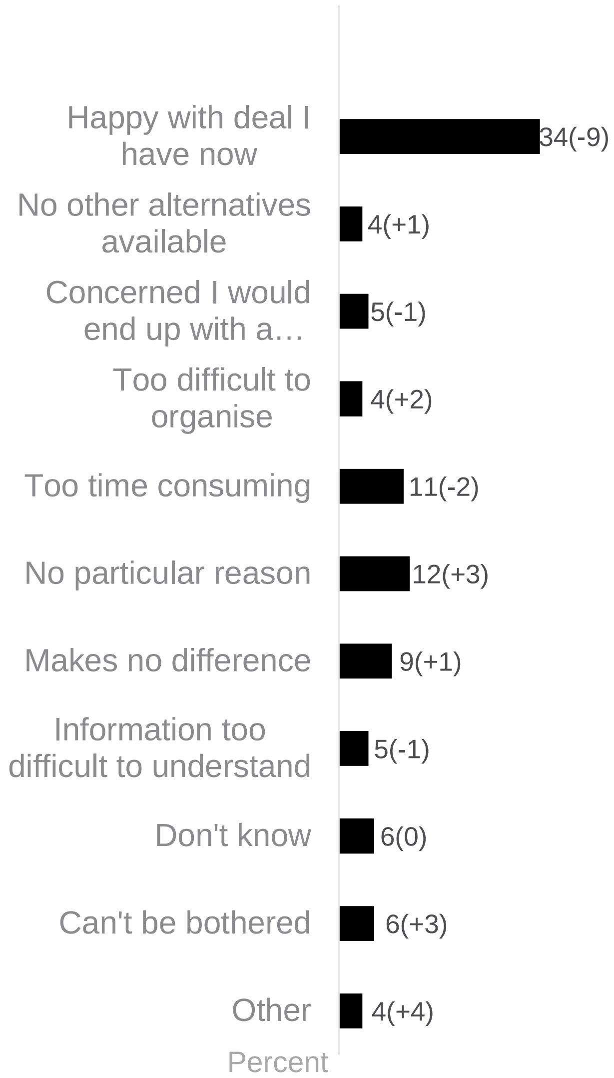
Activity

Reasons for not switching

The proportion saying that they did not switch because they are satisfied with the deal they have now is down, although there is no single big increase elsewhere.

- 34% say that they had not considered switching because they are satisfied with the deal they have now, down 9% since the last survey.
- 13% now say that they had not looked at switching because there were no other alternatives available or that it made no difference (up 2%).
- 20% say that the barriers are too high (too difficult, too time consuming or too difficult to understand), down 1%.

Which of the following best describes your reasons for not considering switching?



Base: New South Wales household consumers who had not considered switching in the last 3 years (n=176)

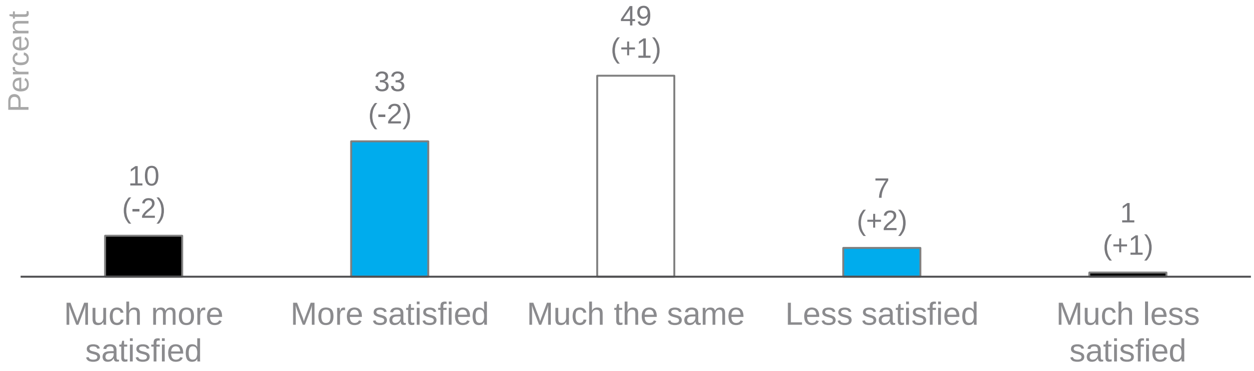
Activity

Satisfaction after considering switching

43% of NSW household consumers who looked at options for switching energy companies or plans say that they are now more satisfied with the value for money they receive.

- This is down 4% since the March / April survey.

> ***"After looking at options for switching energy companies or plans, would you say you are more satisfied, less satisfied or much the same with the value for money you are receiving, compared with before you looked at your options?"***



Base: New South Wales household consumers who considered switching in the last 3 years (n=230)

Activity

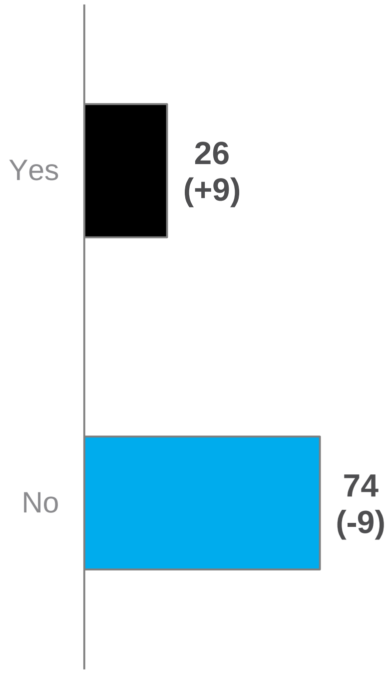
Switching intentions

The proportion of NSW household consumers in this survey saying that they intend to switch in the year ahead is up sharply from the last survey.

- 26% now think they will change in the year ahead, up 9%.
- This now places NSW as the equal highest of any of the states and territories (alongside South Australia).

Future Intentions

Do you intend to switch energy companies or energy plans in the next year?



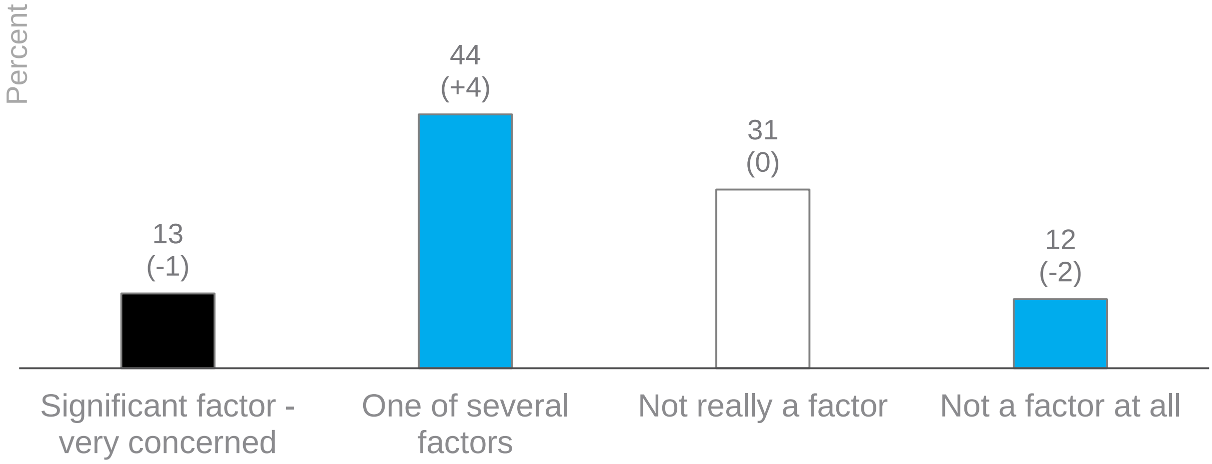
Activity

Consideration of the environment

57% of New South Wales household consumers now say that the environment is a factor they consider when making decisions about energy products and services.

- This is 3% above the previous result, driven by a 4% increase in the proportion saying that it is one of several factors they consider.

"How much does your own personal concern about the environment impact on your decisions about energy products and services?"



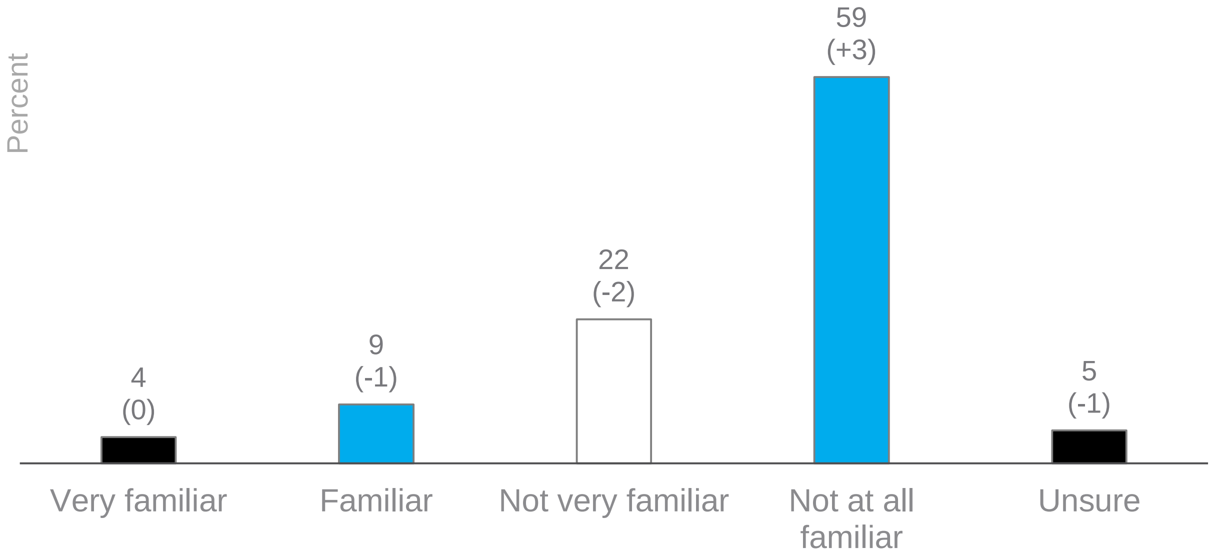
Other

Awareness of ECA

NSW household consumers remain around the national average for declared awareness of Energy Consumers Australia.

- 13% say they are familiar with Energy Consumers Australia, down 1% since the last survey and 7% behind the August / September result for Victoria (the state with the highest declared awareness).

"How familiar are you with an organisation called Energy Consumers Australia?"



Victoria

Overall satisfaction

Victorian household consumers in this survey were somewhat more likely than those in the previous survey to say they are satisfied with the provision of electricity and gas services overall.

- 69% rate their satisfaction as 7 or higher out of 10, up 3% since the last survey.
- Just 2% rate their satisfaction as 3 or lower, which is down 3%.

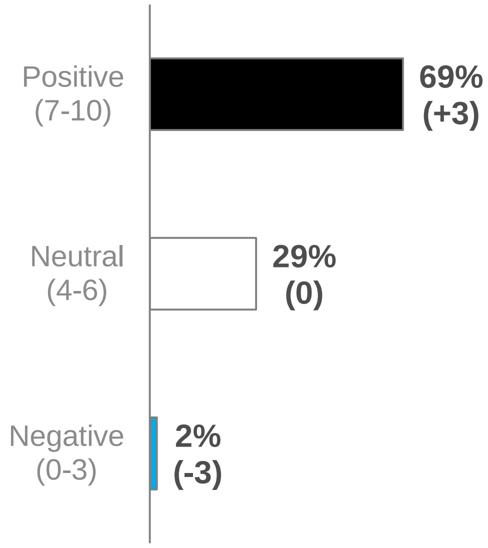
There is also a moderate increase in the proportion rating the level of competition positively.

- 56% now rate this positively, a 4% increase since March / April.
- 36% are neutral, down 5% over that time.

Satisfaction

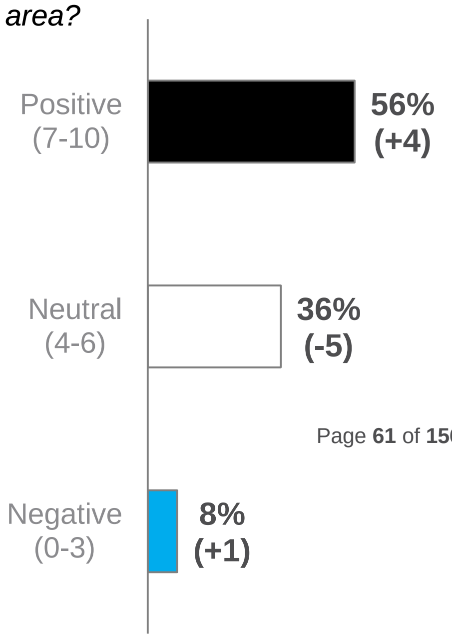
Overall satisfaction

How satisfied are you with the provision of your electricity and gas services overall in the last 6 months?



Satisfaction with competition

How satisfied are you with the level of competition in the energy market in your area?

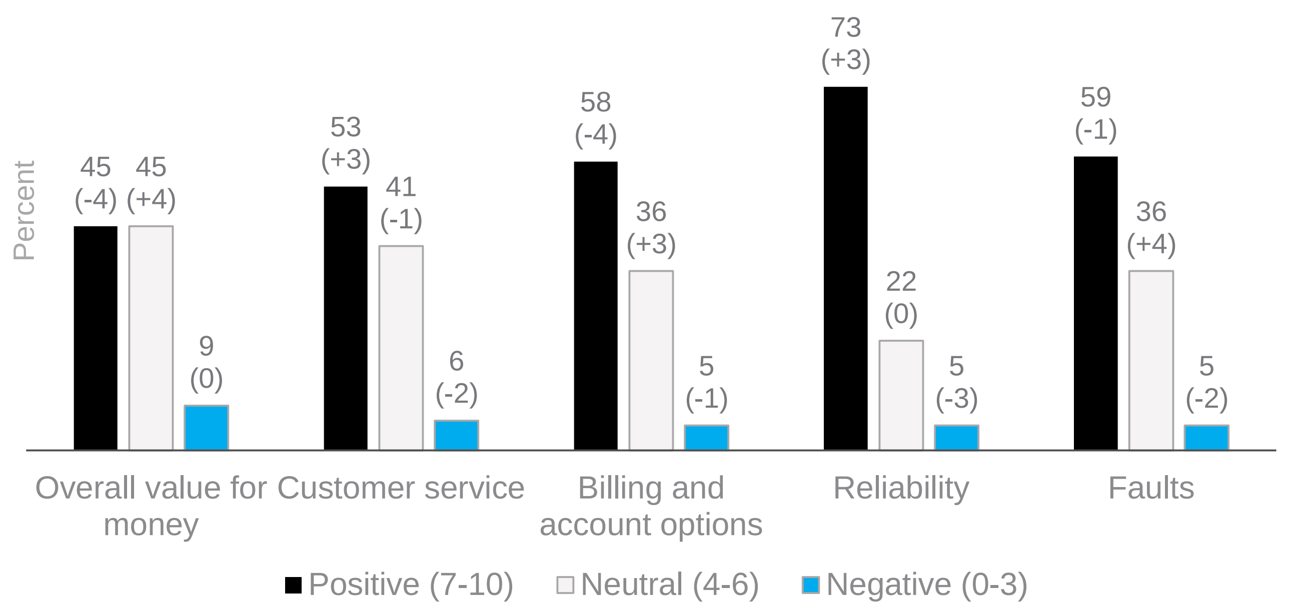


Satisfaction with electricity

Victorian household consumers in this survey gave lower ratings than those in the last survey for value for money and for billing.

- 45% are satisfied with the value for money of electricity, down 4%.
- 58% are satisfied with the billing and account options, also down 4%.
- There are, however, modest increases for customer service (up 3% to 53%) and reliability (up 3% to 73%).

"How would you rate the [attribute]"
0-10 scale, 0='very poor', 10='excellent'



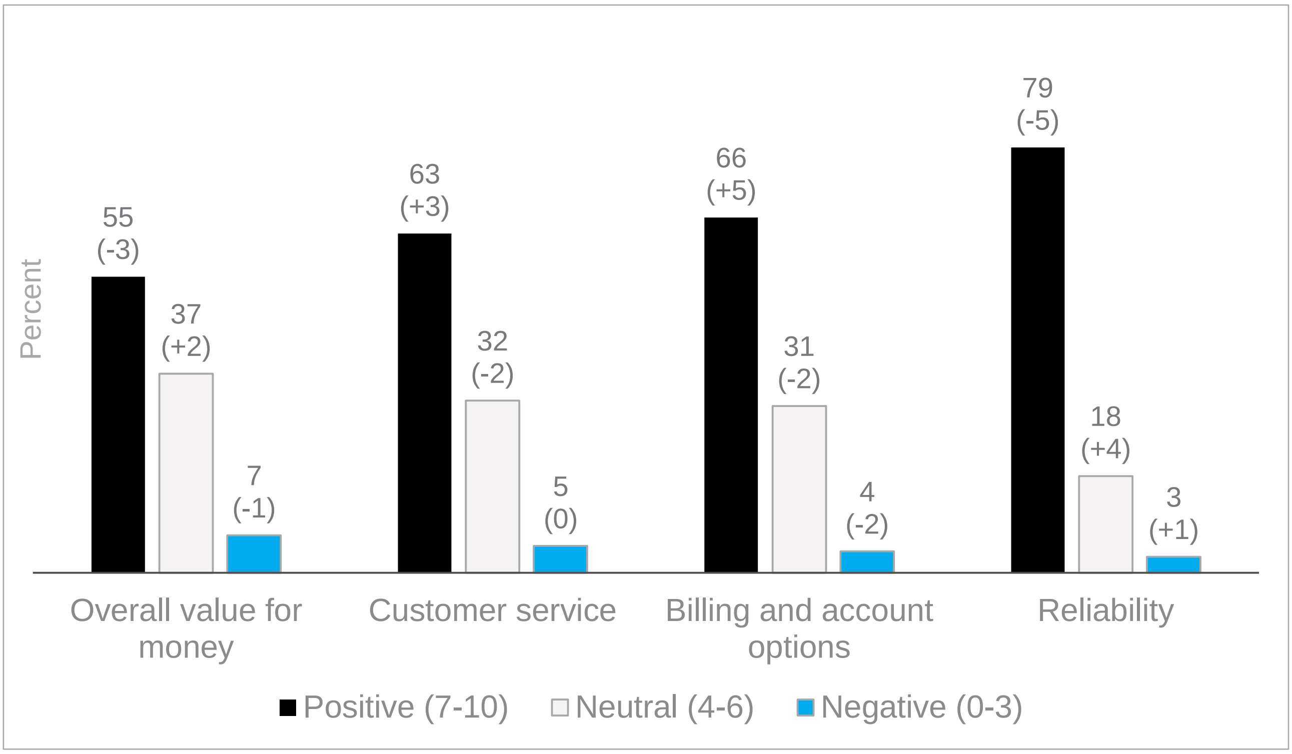
Satisfaction

Satisfaction with gas

As with electricity, Victorian household consumers in this survey gave lower marginally ratings than those in the last survey for the value for money of gas, and slightly better ratings for customer service for gas.

- 55% are satisfied with the value for money they get for gas, down 3% on the March / April survey.
- 63% are satisfied with the customer service for gas (up 3%).
- The proportion satisfied with the billing and account options for gas services is up 5% to 66%, while the proportion satisfied with the reliability of gas services is down 5% to 79%.

"How would you rate the [attribute]"
0-10 scale, 0='very poor', 10='excellent'



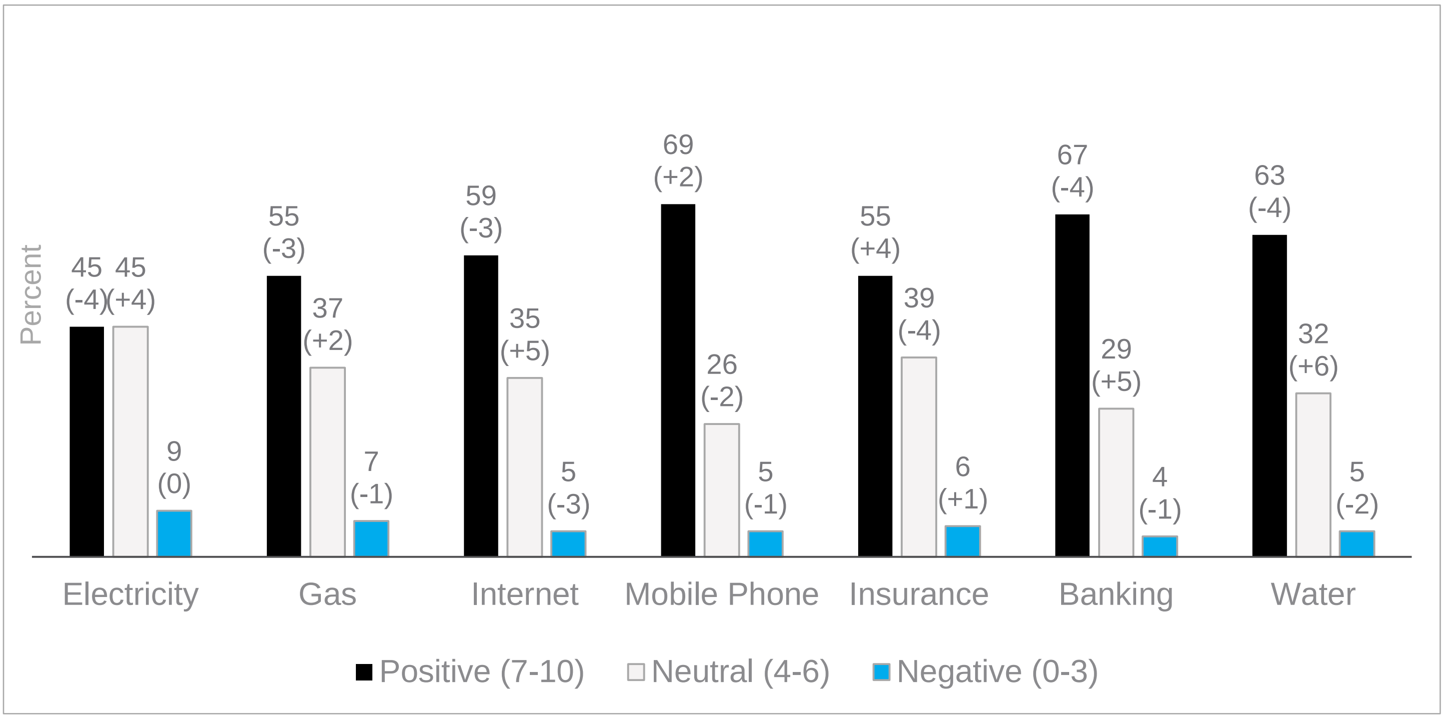
Satisfaction

Satisfaction with utilities

While the NSW results showed electricity and gas falling further behind other services, the picture is less clear amongst Victorian households.

- 55% now say they are satisfied with the value for money of insurance, up 4% since the last survey.
- There are, however, 4% drops in the proportions satisfied with the value for money of banking (to 67%) and water (to 63%).

"How would you rate the [attribute]"
0-10 scale, 0='very poor', 10='excellent'



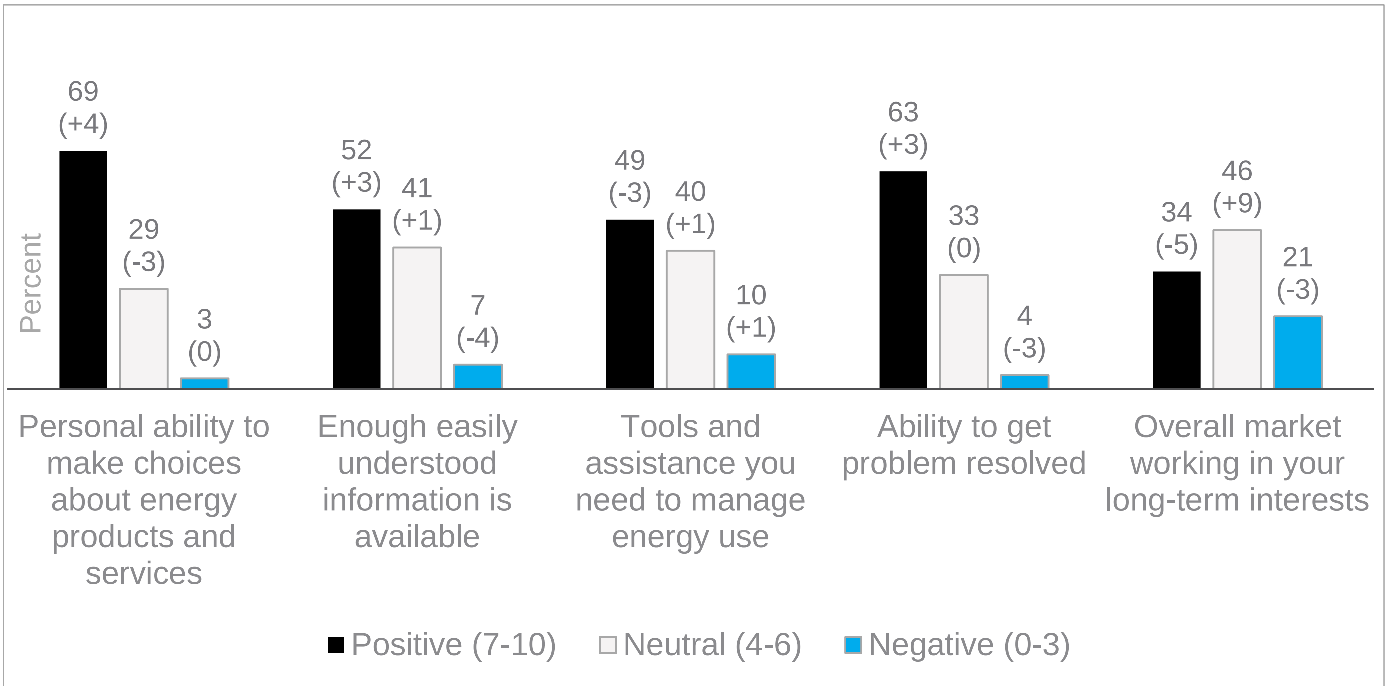
Confidence

Confidence in information and tools

The proportion of Victorian household consumers saying they are confident that the market is working in their long term interest is down.

- 34% are confident that this is the case, a drop of 5%.
- 69% are however confident in their own ability to make choices (up 4%).

How would you rate the following:
0-10 scale, 0='very poor', 10='excellent'



Confidence

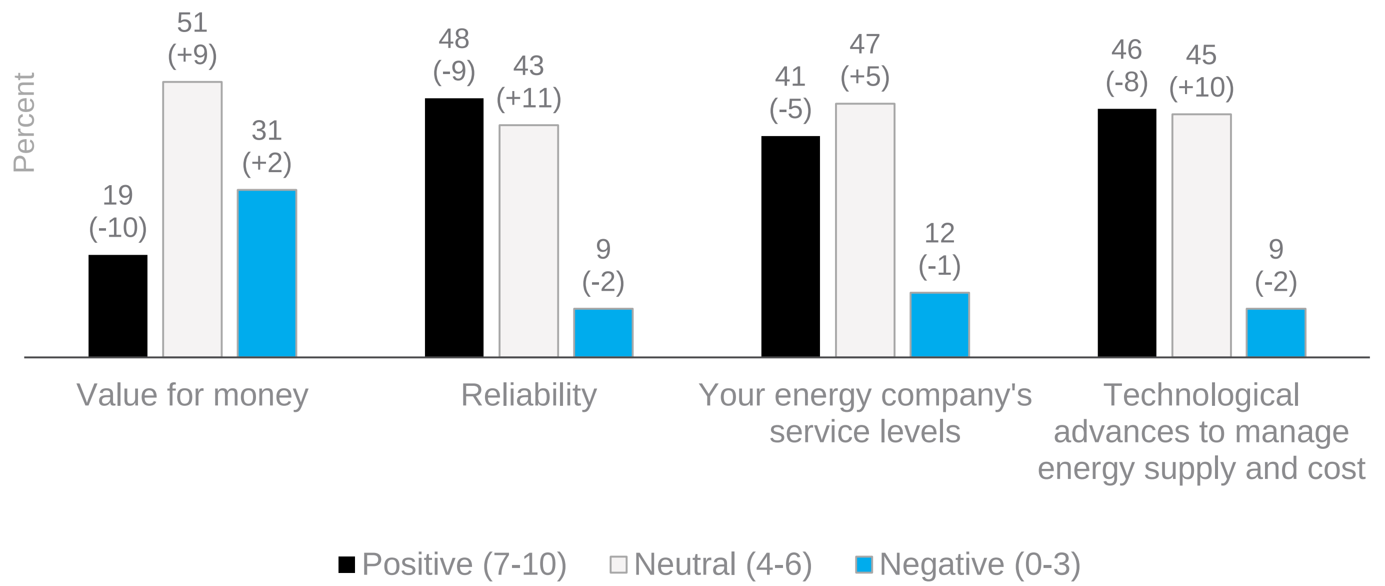
Confidence in long term outcomes

In line with the lower proportion expressing confidence that the market is working in their long term interests, Victorian household consumers in this survey are also less likely than those in the previous survey to express confidence in specific outcomes.

- Just 19% now say that they are confident that the market will deliver better value for money, down 10% since March / April.
- The proportion saying that they are confident in better outcomes for reliability is down 9% to 48%, and there is an 8% drop in the proportion confident that the market will deliver better outcomes for technology (now 46%).

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:

0-10 scale, 0='not at all confident', 10='very confident'



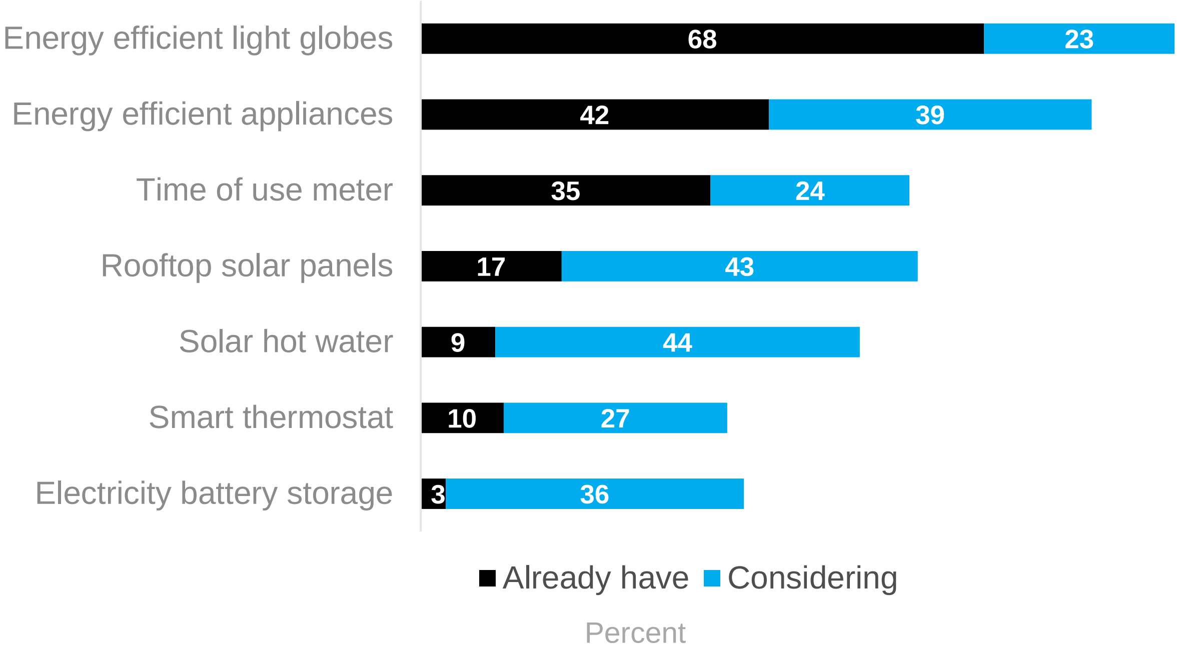
Activity

Uptake of technologies

The proportions of Victorian household consumers saying that they are considering rooftop solar, solar hot water and battery storage are up since the last survey.

- 43% now say they are considering rooftop solar (up 5%), while 44% are considering solar hot water (up 7%).
- 36% claim to be considering electricity battery storage, a 5% increase.

"Are you considering purchasing or using any of the following technologies to manage the cost of electricity in your household?"



Activity

Switching behaviour

60% of Victorian household consumers say that they have at least considered switching in the last three years, down 2% since the last survey.

- 27% report that they have switched (up 3%), while 33% say that they considered switching but did not end up doing so (down 5%).

Previous behaviour

"Have you looked into or researched your options for switching energy companies or energy plans in the last 3 years?"

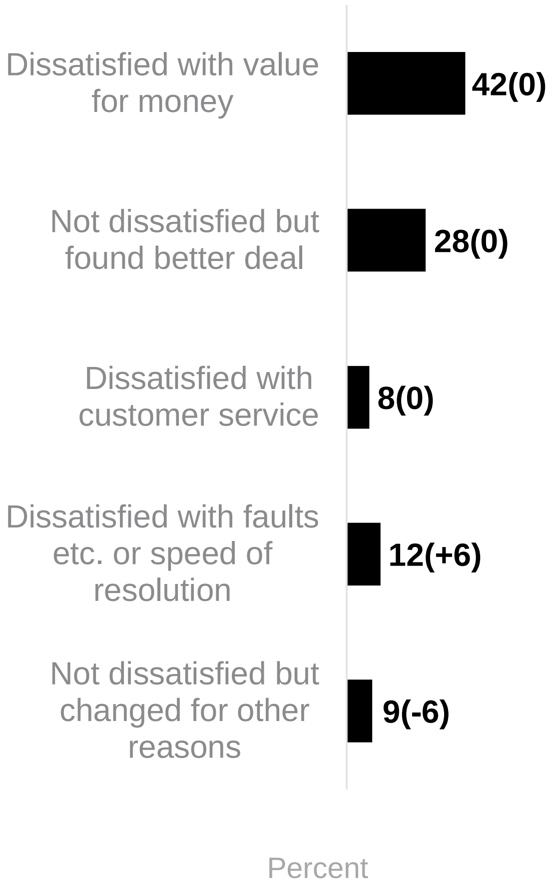
Activity

Reasons for considering switching

The top two reasons Victorian household consumers in this survey gave for considering switching are unchanged from the last survey.

- 42% say they were dissatisfied with the value for money, and 28% say that were not dissatisfied but had found a better deal elsewhere.
- The proportion saying that they considered switching because they were dissatisfied with faults or the speed of resolution is up 6% to 12%, while the proportion who say they are not dissatisfied but changed for other reasons is down 6% to 9%.

Which of the following best describes your reasons for considering switching?



Base: Victorian household consumers who considered switching in the last 3 years (n=250)

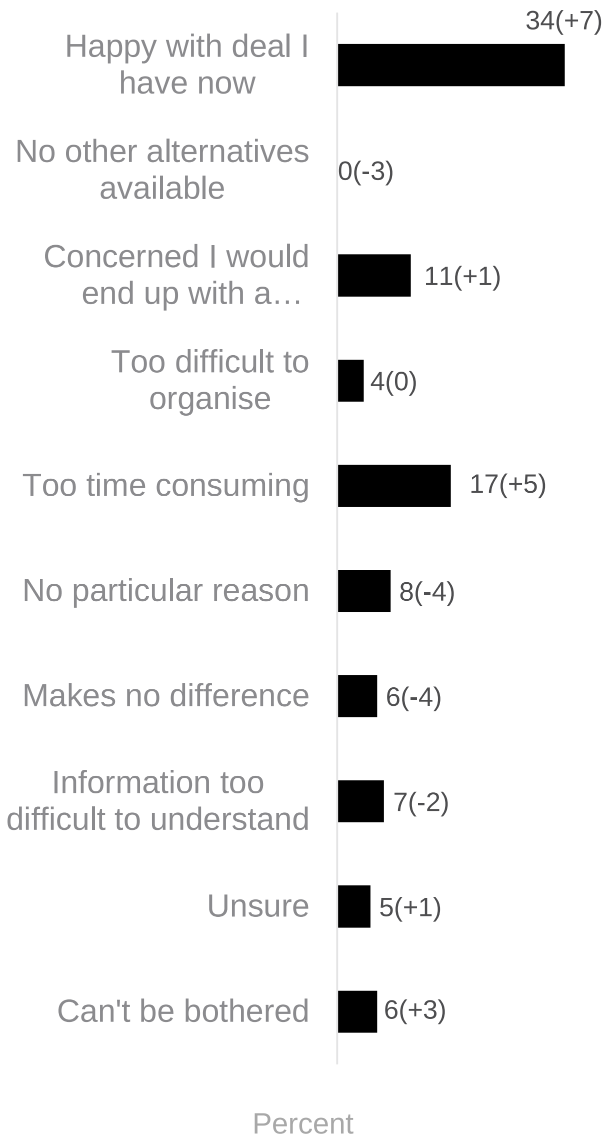
Activity

Reasons for not switching

Victorian household consumers in this survey were more likely than those in the last survey to say they did not consider switching because they were satisfied with the deal they have now.

- 34% say that this was the main reason, up 7% since the last survey.
- 6% say that they had not looked at switching because there were no other alternatives available or that it made no difference (down 7%).
- 28% say that the barriers are too high (too difficult, too time consuming or too difficult to understand), up 3%.

Which of the following best describes your reasons for not considering switching?



Base: Victorian household consumers who had not considered switching in the last 3 years (n=163)

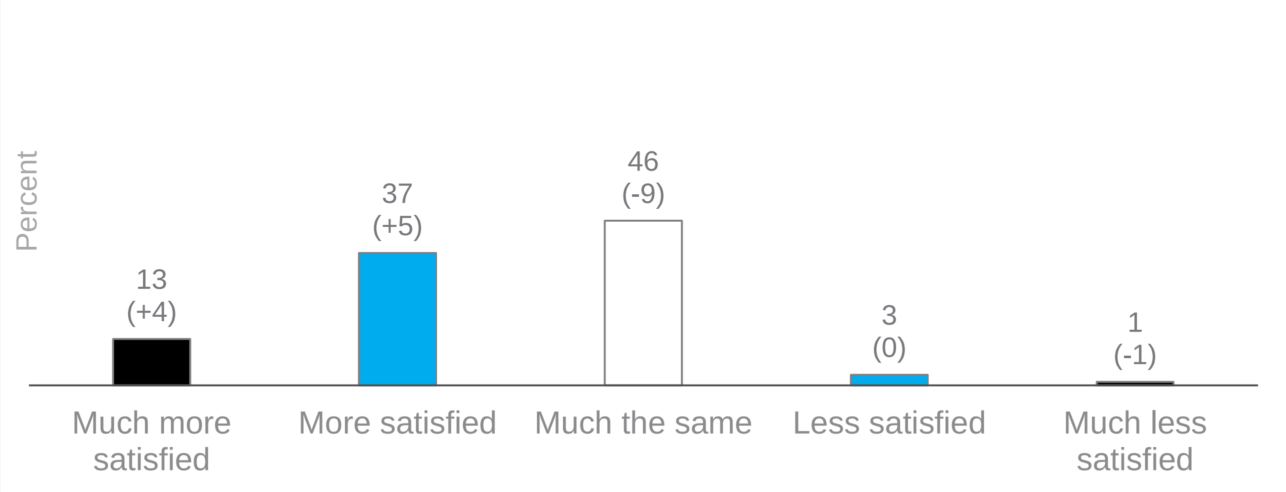
Activity

Satisfaction after considering switching

Victorian household consumers in this survey who had considered switching are more likely than those in the previous survey to say that this consideration helped them to feel more satisfied.

- 50% now say that it made them more satisfied, up 9% since the March / April survey.

"After looking at options for switching energy companies or plans, would you say you are more satisfied, less satisfied or much the same with the value for money you are receiving, compared with before you looked at your options?"



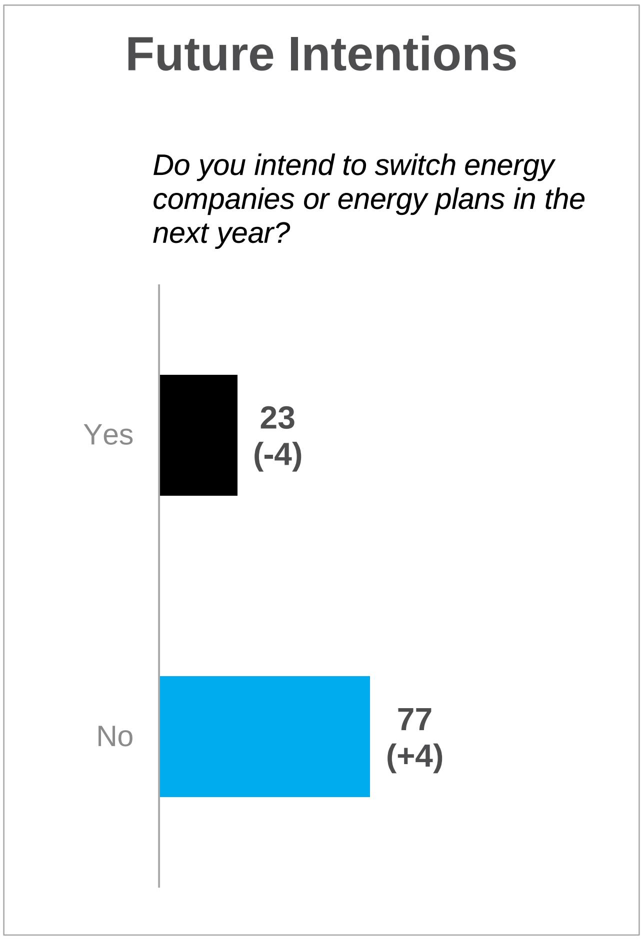
Base: Victorian household consumers who considered switching in the last 3 years (n=250)

Activity

Switching intentions

23% of Victorian household consumers in this survey say they are likely to change energy companies or plans in the year ahead.

- This is 4% below the previous result.



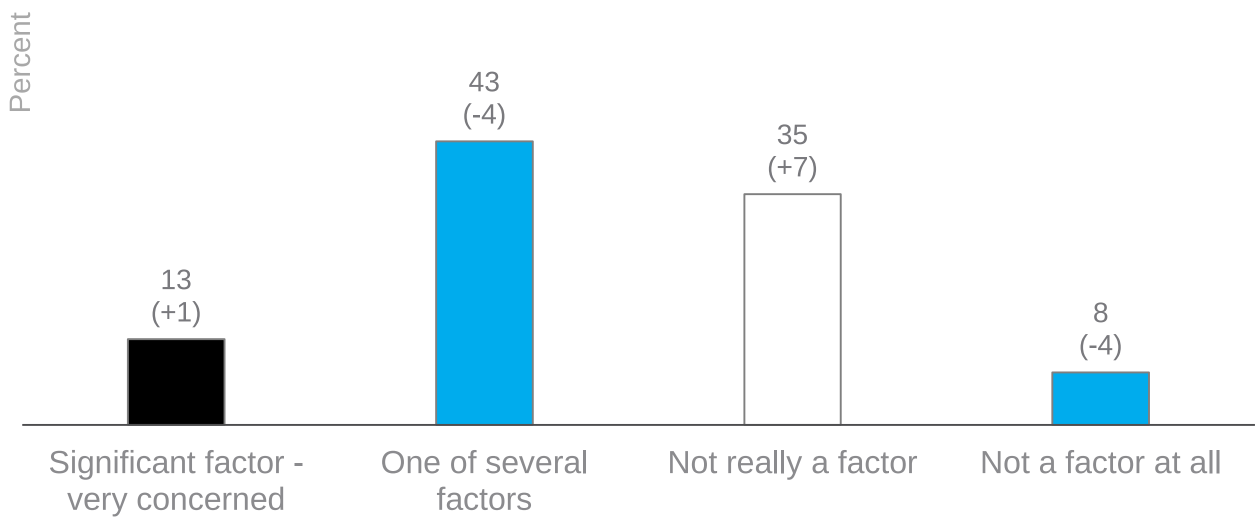
Activity

Consideration of the environment

56% of Victorian household consumers in this survey say that the environment is a factor they consider when making decisions about energy products and services, down 3% since the last survey.

- 13% report that it is one of the most important factors they consider, up 1%.

"How much does your own personal concern about the environment impact on your decisions about energy products and services?"



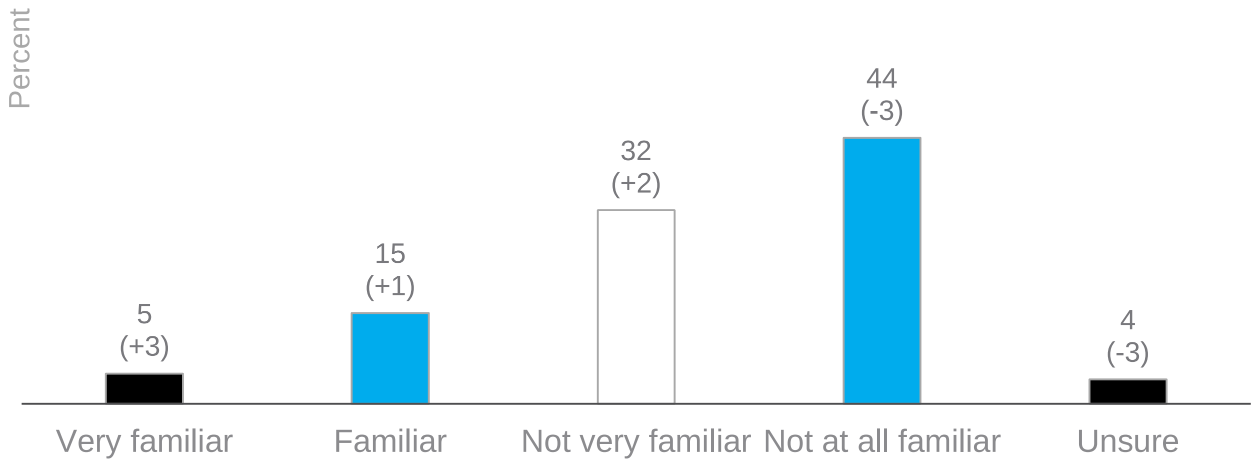
Other

Awareness of ECA

Although declared awareness remains low, Victorian household consumers are the most likely to say that they are aware of Energy Consumers Australia and the proportion who do so is up since the last survey.

- 20% now claim to be familiar with Energy Consumers Australia, up 4% since the last survey.
- The highest proportion claiming to be aware of ECA in any other state or territory is 15% (in South Australia).

"How familiar are you with an organisation called Energy Consumers Australia?"



Queensland

Satisfaction

Overall satisfaction

The proportion of Queensland household consumers satisfied with the provision of electricity and gas services overall is down in the latest survey.

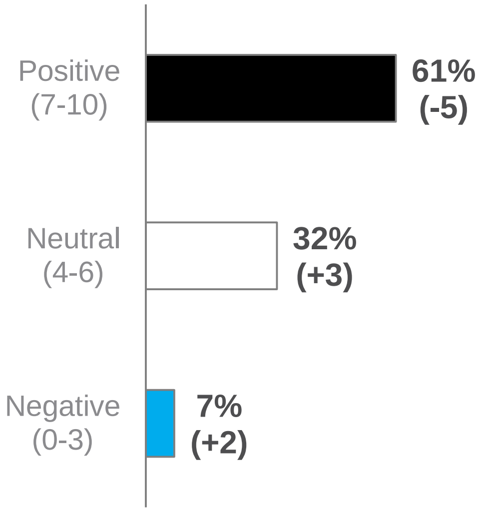
- 61% rate their satisfaction as 7 or higher out of 10, down 5% since the benchmark survey.
- This is balanced out by a 3% increase in the proportion with neutral views, and a 2% increase in the proportion giving negative ratings.

Satisfaction with levels of competition is also down in Queensland.

- 34% now say they are satisfied with the level of competition in their area, a drop of 3%.
- The proportion giving neutral ratings is also down 3%.
- There is consequently a 6% increase in the proportion saying that they are dissatisfied with the level of competition in Queensland (now 29%).

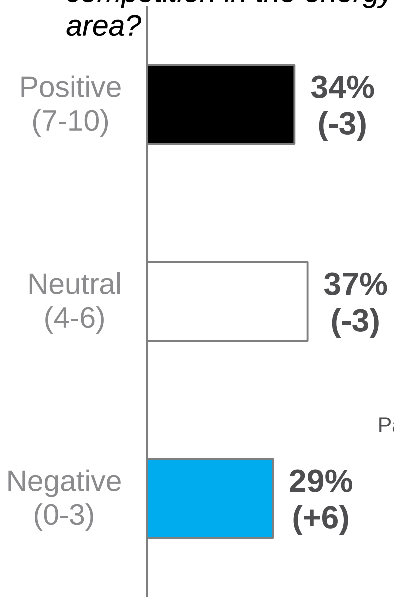
Overall satisfaction

How satisfied are you with the provision of your electricity and gas services overall in the last 6 months?



Satisfaction with competition

How satisfied are you with the level of competition in the energy market in your area?



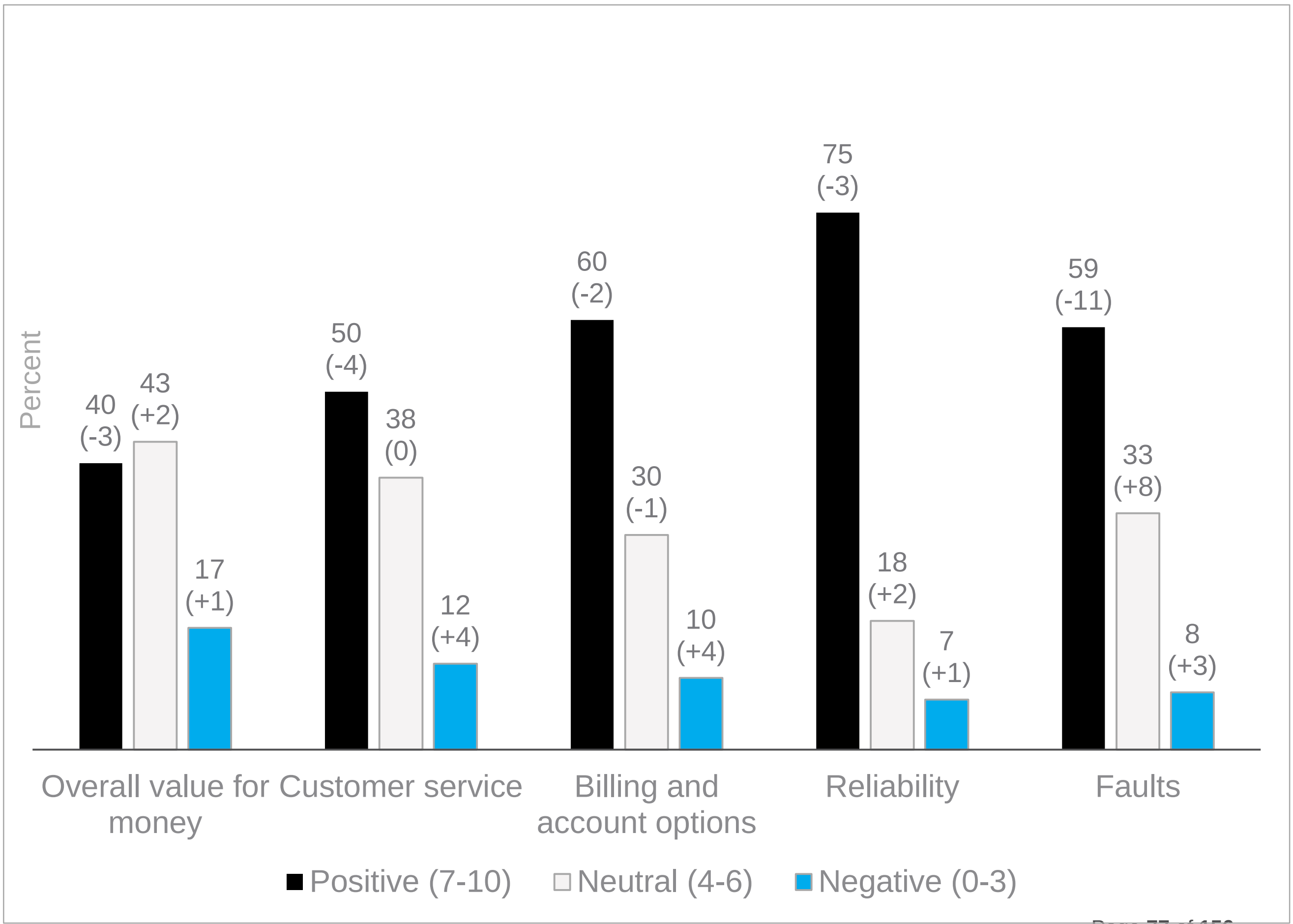
Satisfaction

Satisfaction with electricity

Queensland household consumers in this survey gave lower ratings than those in the previous survey for all five of the measures for electricity.

- The biggest drop is for faults, where 59% now say they are satisfied with the way faults have been managed, down 11% since the March / April survey.
- The other falls are smaller, such as a 3% drop in the proportion satisfied with the value for money of electricity (now 40%) and a 4% dip in the proportion satisfied with customer service.

"How would you rate the [attribute]"
0-10 scale, 0='very poor', 10='excellent'



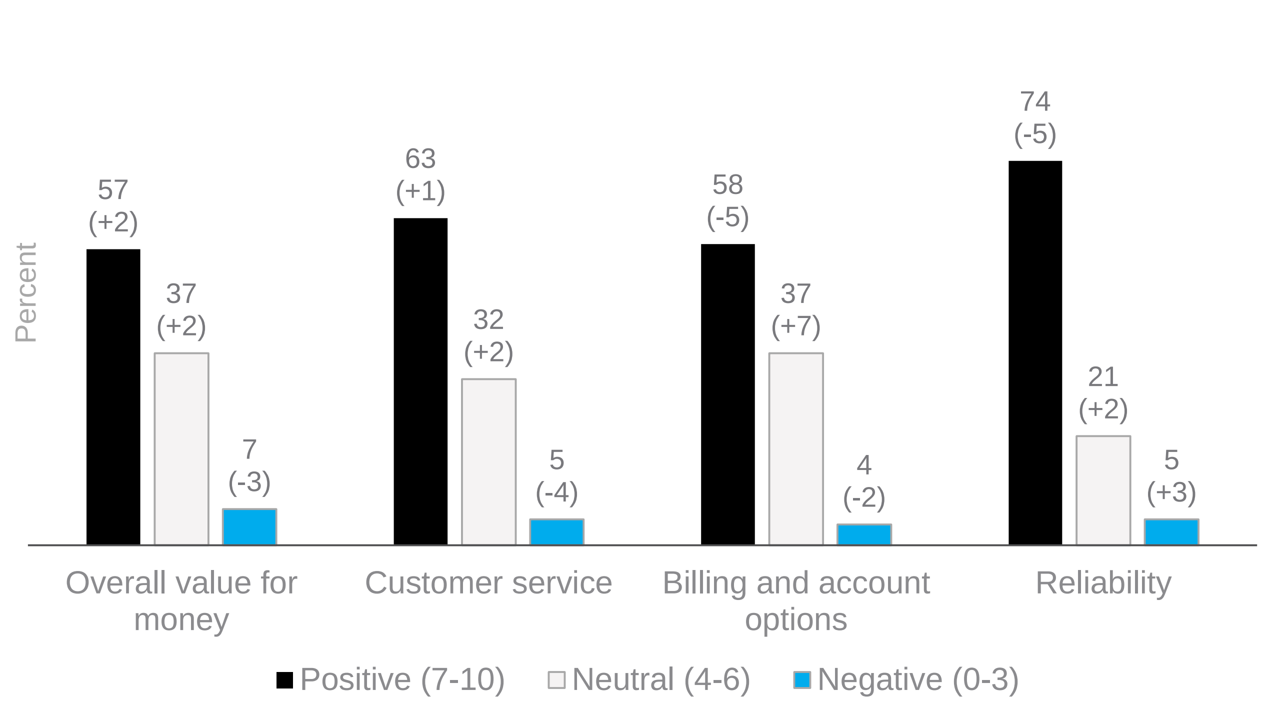
Satisfaction

Satisfaction with gas

Queensland household consumers in this survey gave lower ratings than those in the last survey for billing and reliability of gas.

- 58% now say that they are satisfied with the billing and account options for gas, down 5% since the March / April survey.
- 74% say that they are satisfied with the reliability of gas, also down 5%.
- The changes on value for money and customer service are within the margin of error.

"How would you rate the [attribute]"
0-10 scale, 0='very poor', 10='excellent'



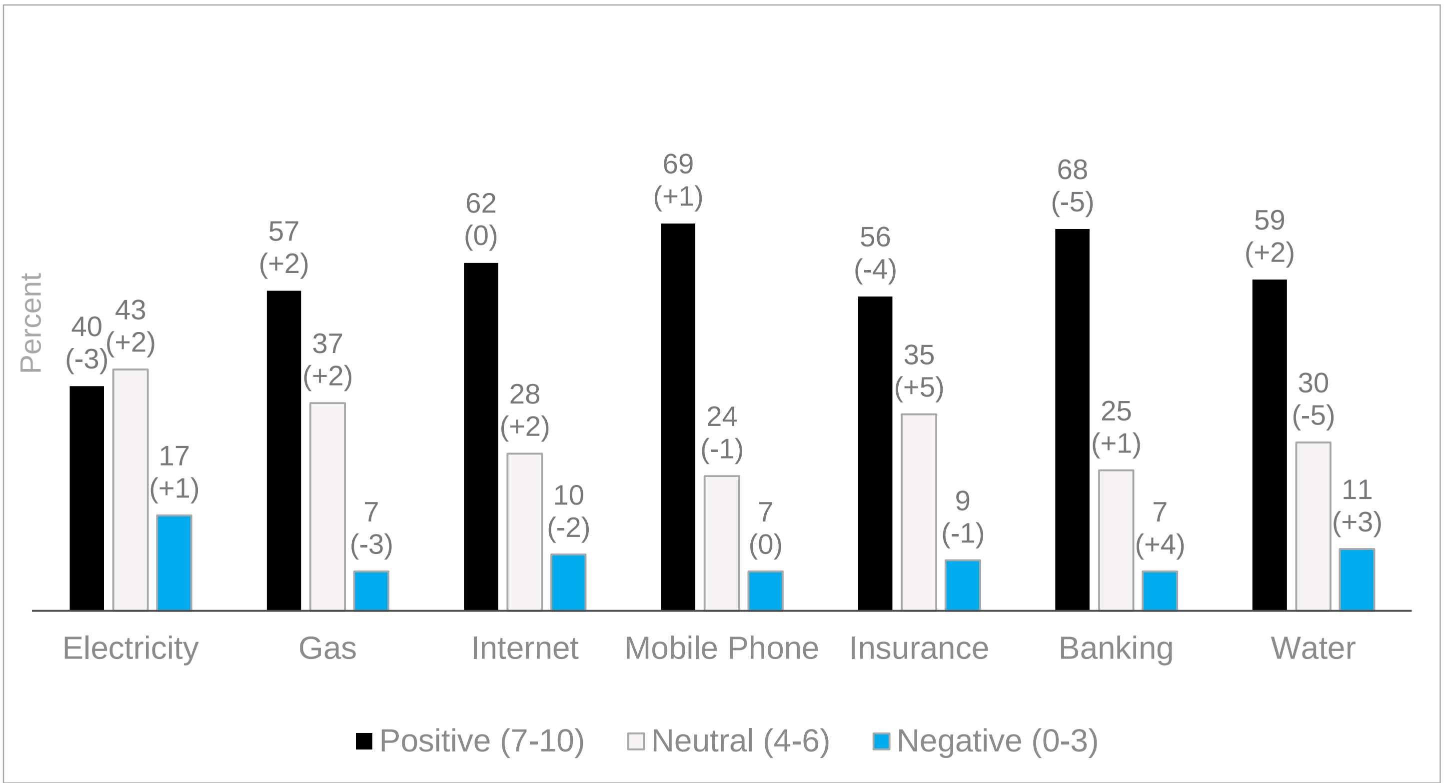
Satisfaction

Satisfaction with utilities

The small decline in satisfaction with the value for money of electricity has been accompanied by drops for banking and insurance, but not other services.

- 68% of Queensland household consumers in this survey are satisfied with the value for money of electricity, down 5% since the March / April survey.
- 56% are satisfied with value for money, down 4%.
- The movements for other services are within the margin of error.

"How would you rate the [attribute]"
0-10 scale, 0='very poor', 10='excellent'



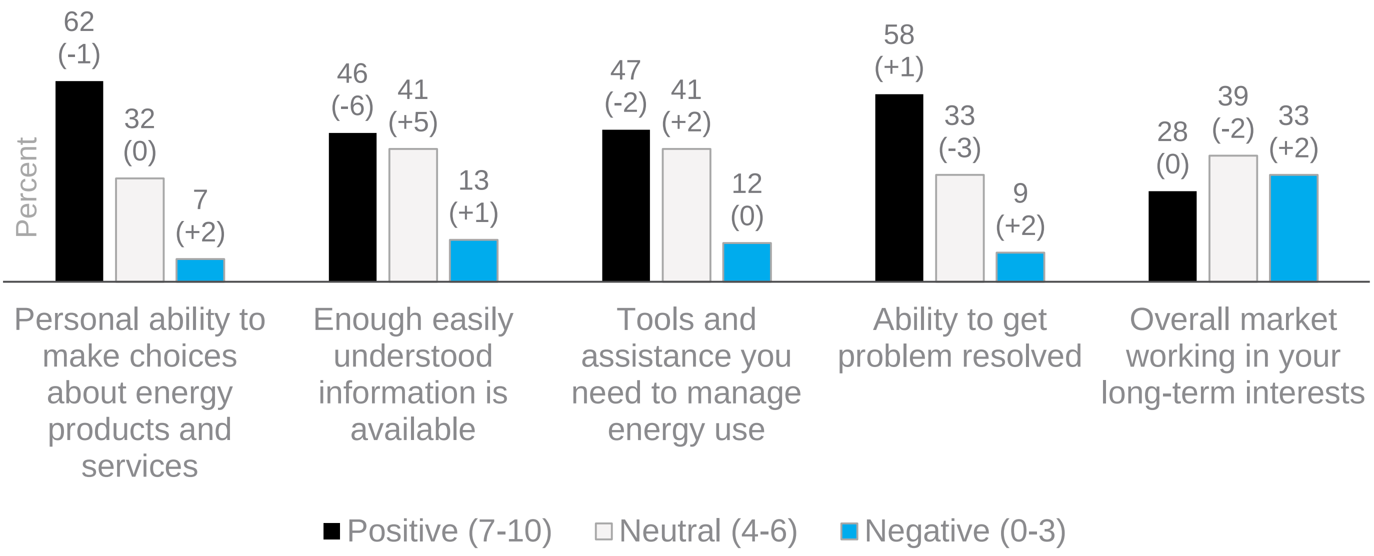
Confidence

Confidence in information and tools

Queensland household consumers in this survey are less confident than those in the last survey that there is enough easily understood information available on electricity and gas services.

- 46% now say they are confident that this is the case, down 6% since March / April survey.
- All other changes are within the margin of error.

How would you rate the following:
0-10 scale, 0='very poor', 10='excellent'



Confidence

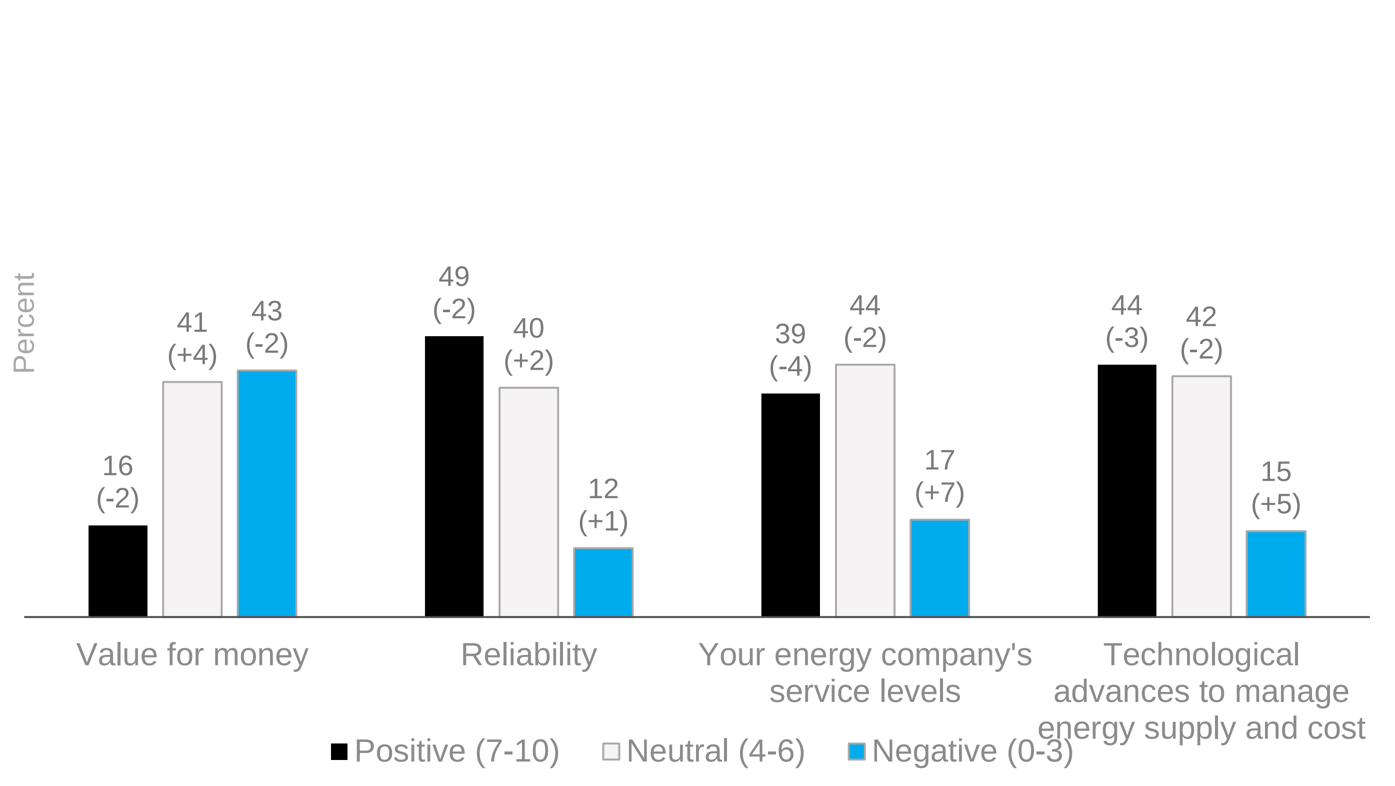
Confidence in long term outcomes

All four attributes measuring confidence in market outcomes are down slightly since the last survey.

- The proportion of Queensland household consumers saying they are confident of better outcomes for customer service is down 4% to 39%.

"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:"

0-10 scale, 0='not at all confident', 10='very confident'



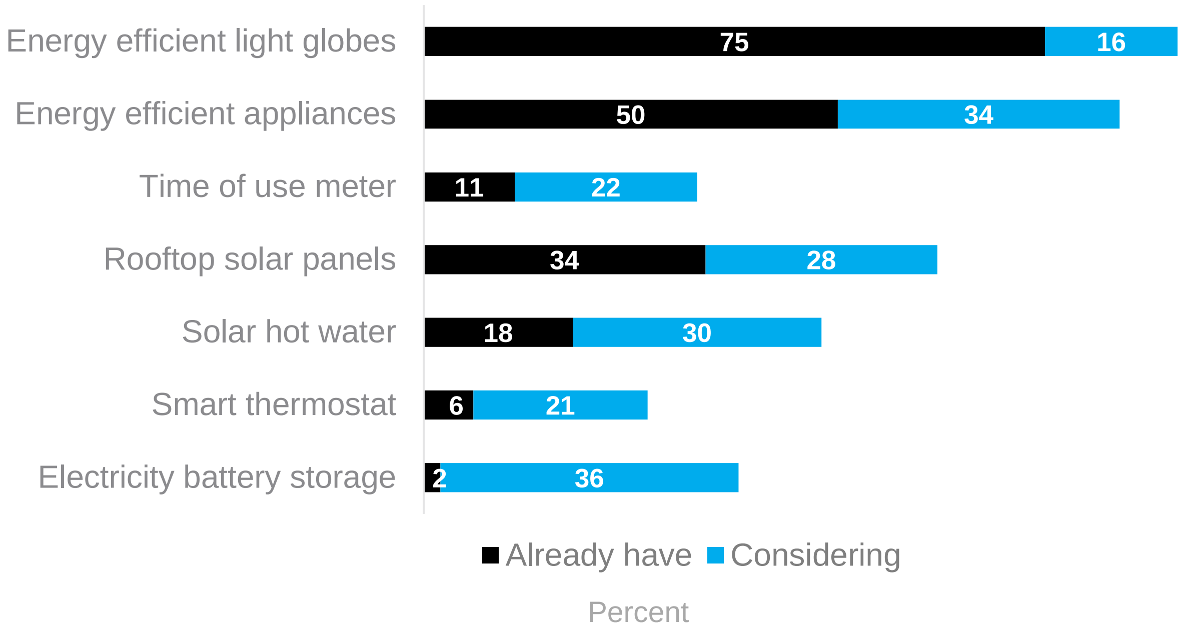
Activity

Uptake of technology

Queensland household consumers in this survey are more likely than those in the last survey to say they are considering getting energy efficient appliances.

- 34% now say they are considering such appliances, up 8% since the last survey.
- The proportion who are considering solar hot water is, however, down 5% to 30%.

"Are you considering purchasing or using any of the following technologies to manage the cost of electricity in your household?"



Activity

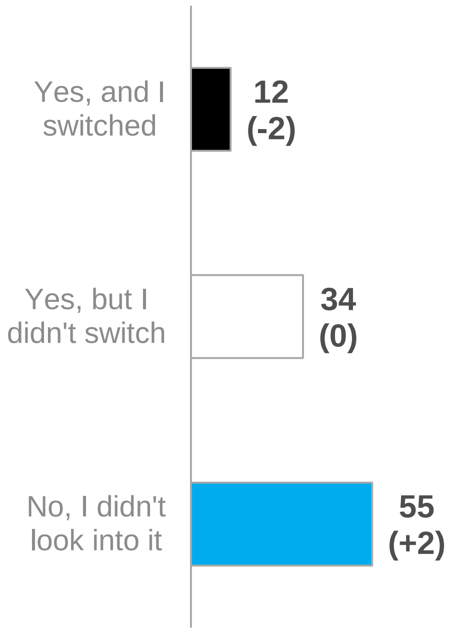
Consideration of switching

As in the previous survey, only a minority of Queensland household consumers have even considered switching energy companies or energy plans in the last three years.

- 12% say that they have actually switched (down 2% since the last survey) and 34% have considered switching but not done so (unchanged).

Previous behaviour

"Have you looked into or researched your options for switching energy companies or energy plans in the last 3 years?"



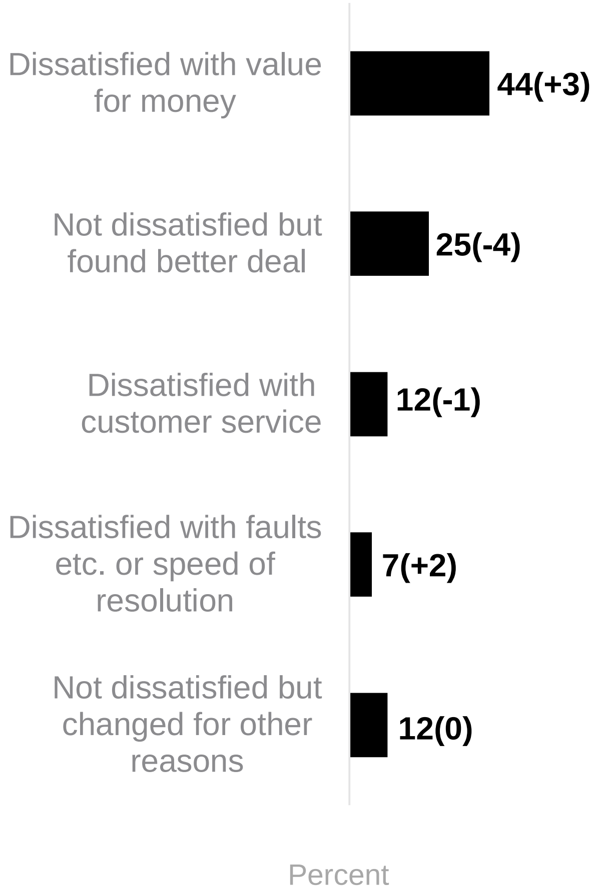
Activity

Reasons for considering switching

Allowing for the sample size, the reasons Queensland household consumers in this survey give for considering switching are much the same as in the previous survey.

- 44% say that they considered switching because they were dissatisfied with value for money (up 3%).
- 25% say that they were not dissatisfied but found a better deal elsewhere (down 4%).

Which of the following best describes your reasons for considering switching?



Base: Queensland household consumers who considered switching in the last 3 years (n=134)

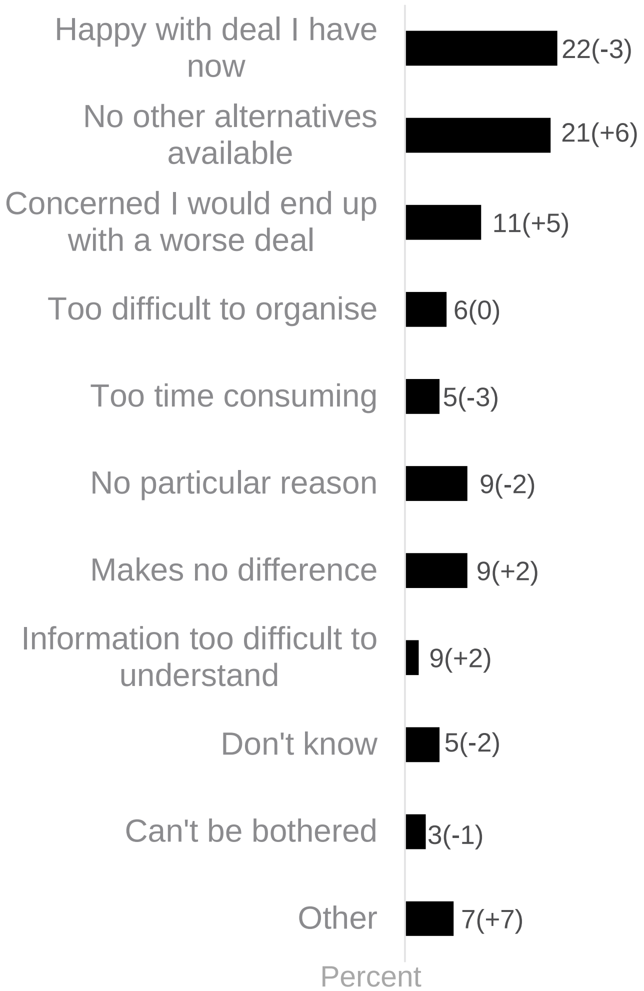
Activity

Reasons for not switching

The main difference in the reasons Queensland household consumers in this survey gave for not considering switching is there were no other alternatives or that it made no difference to the deal they have now.

- 30% say that they had not looked at switching because there were no other alternatives available or that it made no difference (down 1%).
- 22% are satisfied with the deal they have now (down 3%).
- 13% say that the barriers are too high (too difficult, too time consuming or too difficult to understand), down 3%.

Which of the following best describes your reasons for not considering switching?



Base: Queensland household consumers who had not considered switching in the last 3 years (n=161)

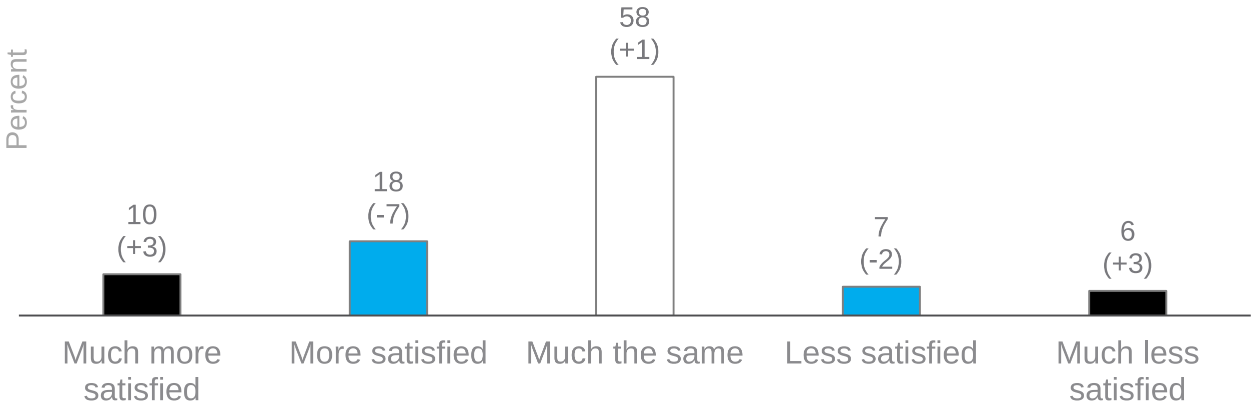
Activity

Satisfaction after considering switching

Given the small number of participants answering this question, the results are around the same as in the last survey.

- 28% of Queensland household consumers in this survey who considered switching say that doing so made them more satisfied, down 4% since the March / April survey.

"After looking at options for switching energy companies or plans, would you say you are more satisfied, less satisfied or much the same with the value for money you are receiving, compared with before you looked at your options?"



Base: Queensland household consumers who considered switching in the last 3 years (n=134)

Activity

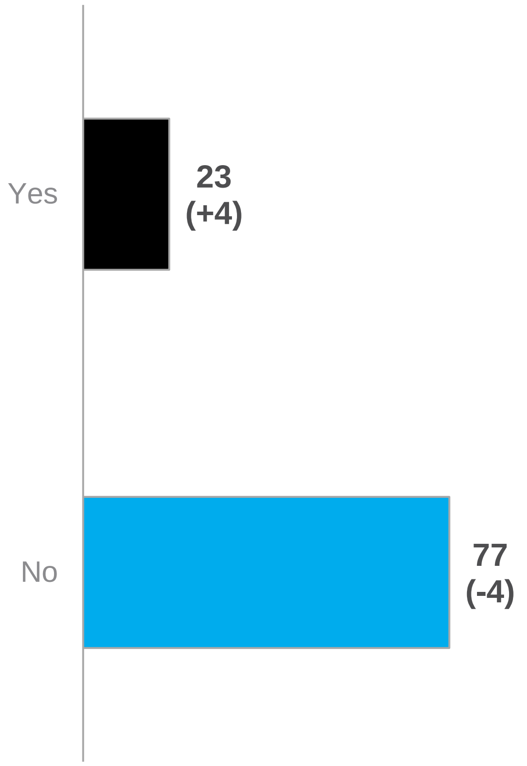
Switching intentions

Queensland household consumers in this survey were more likely than those in the last survey to say they intend to switch in the year ahead.

- 23% say that they intend to do so, up 4% since the last survey.

Future Intentions

Do you intend to switch energy companies or energy plans in the next year?



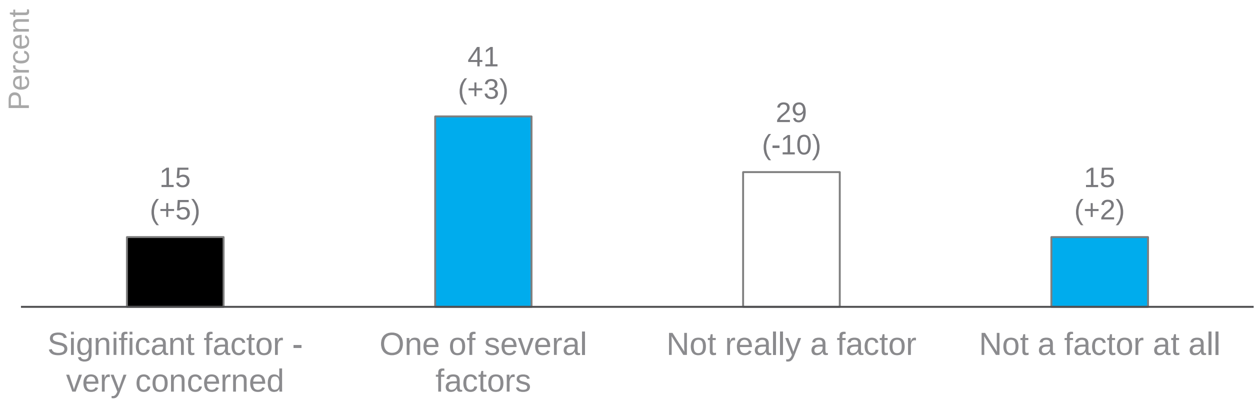
Activity

Consideration of the environment

Queensland household consumers are more likely than those in the previous survey to say that they consider the environment in decisions about energy products and services.

- 15% now say it is a very significant factor (up 5%) and 41% claim that it is one of several factors they consider (up 3%).

"How much does your own personal concern about the environment impact on your decisions about energy products and services?"



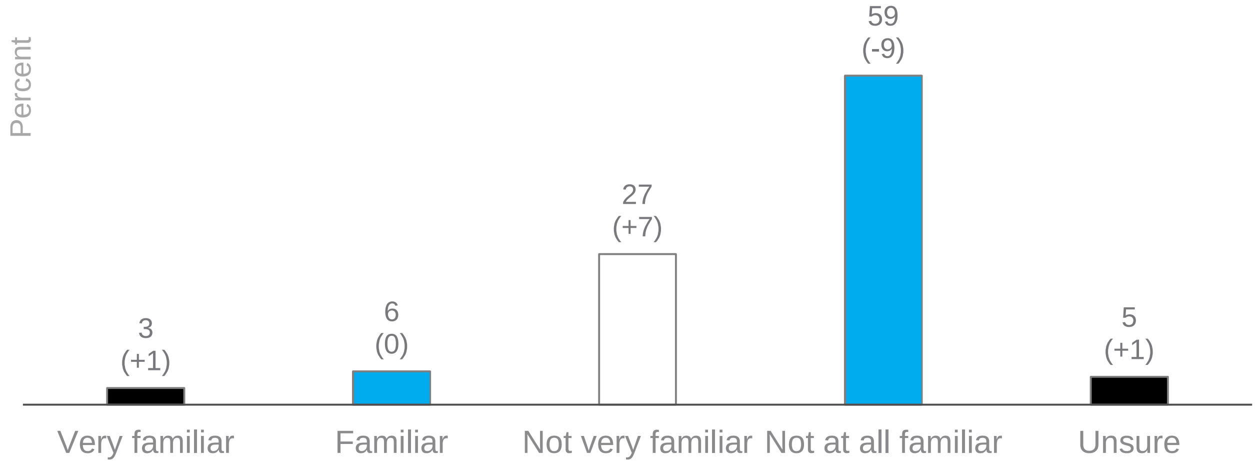
Other

Awareness of ECA

Queensland household consumers in this survey are as likely as those in the previous survey to say they are familiar with Energy Consumers Australia.

- Just 9% say that they are very familiar or familiar with Energy Consumers Australia, almost the same as in the last survey.

"How familiar are you with an organisation called Energy Consumers Australia?"



South Australia

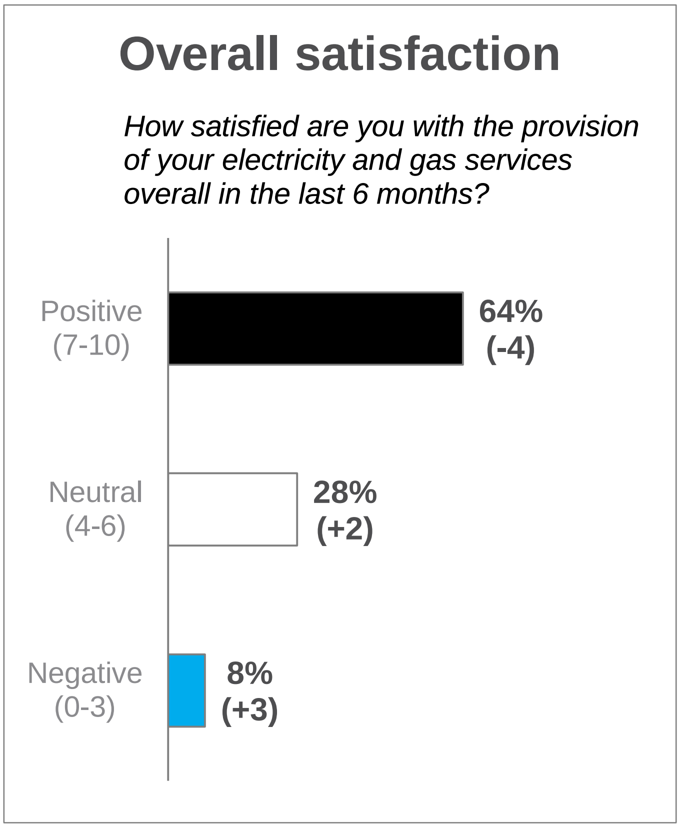
Overall satisfaction

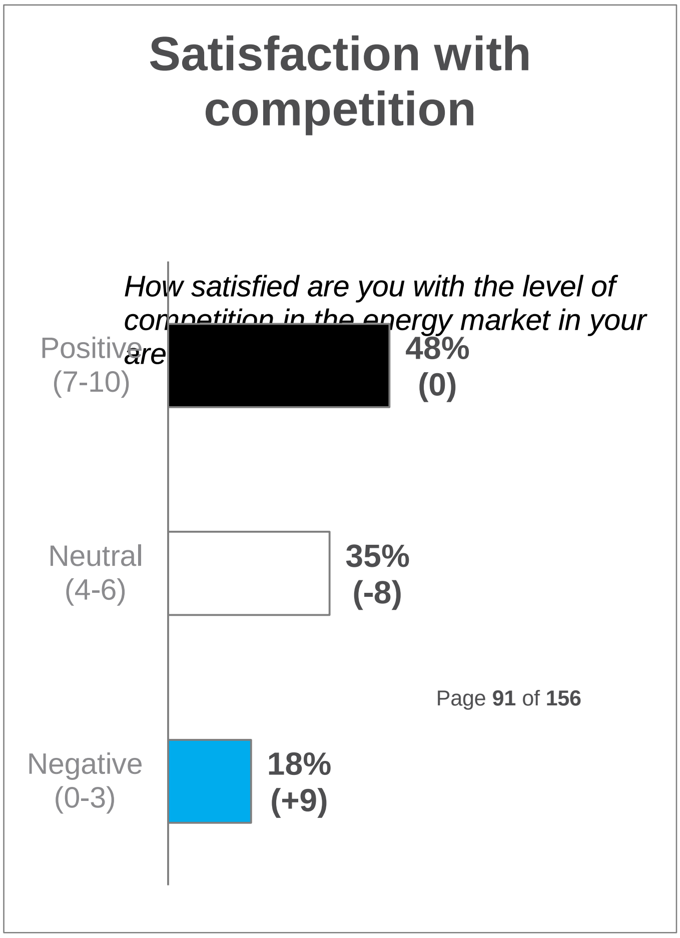
South Australian household consumers in this survey gave lower overall satisfaction ratings than those in the previous survey.

- 64% rate their satisfaction as 7 or higher out of 10, down 4% on the last survey.
- Fieldwork for this survey was before the statewide power cuts of late September.

There have been substantial shifts in satisfaction with levels of competition.

- Although the total proportion satisfied with the level of competition is unchanged, there has been a shift from neutral to negative positions.
- 18% of South Australian household consumers now rate the level of competition negatively, up 9% on the last survey.
- 35% give neutral ratings, down 8% since the March / April survey.





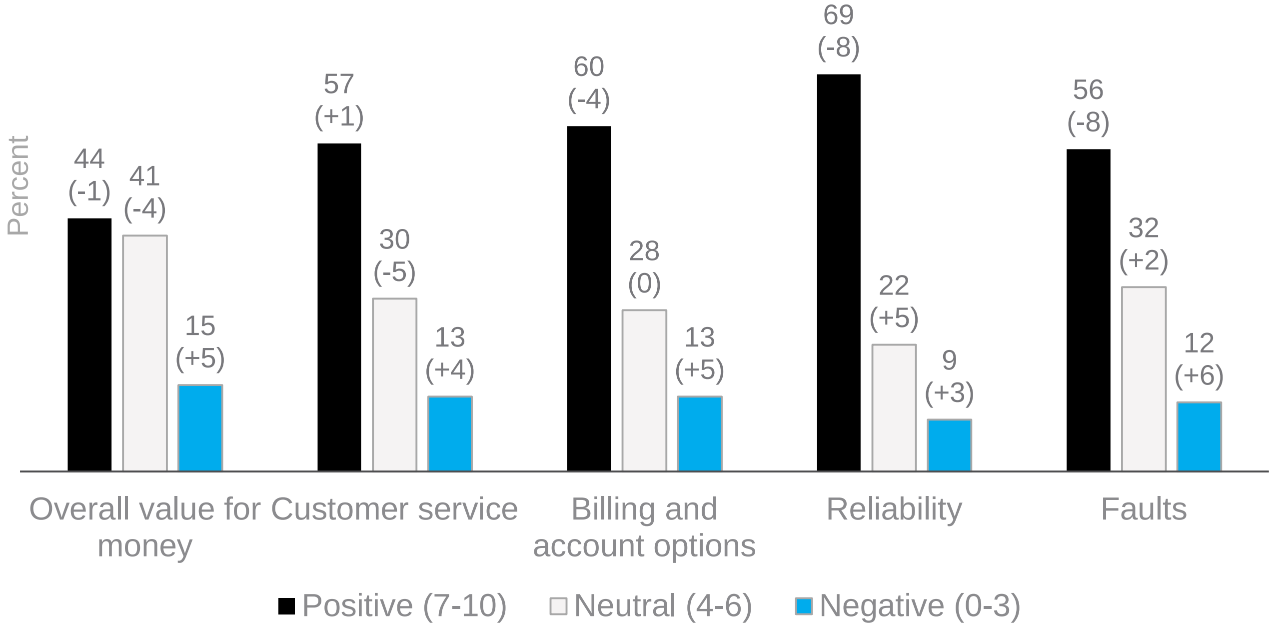
Satisfaction

Satisfaction with electricity

South Australian household consumers in this survey are less satisfied than those in the last survey with the way their company had handled reliability and faults.

- 69% are satisfied with reliability (down 8%) and 56% are satisfied with the way faults were handled (also down 8%)
- As noted, this poll was conducted before the South Australian blackout of late September.

"How would you rate the [attribute]"
0-10 scale, 0='very poor', 10='excellent'



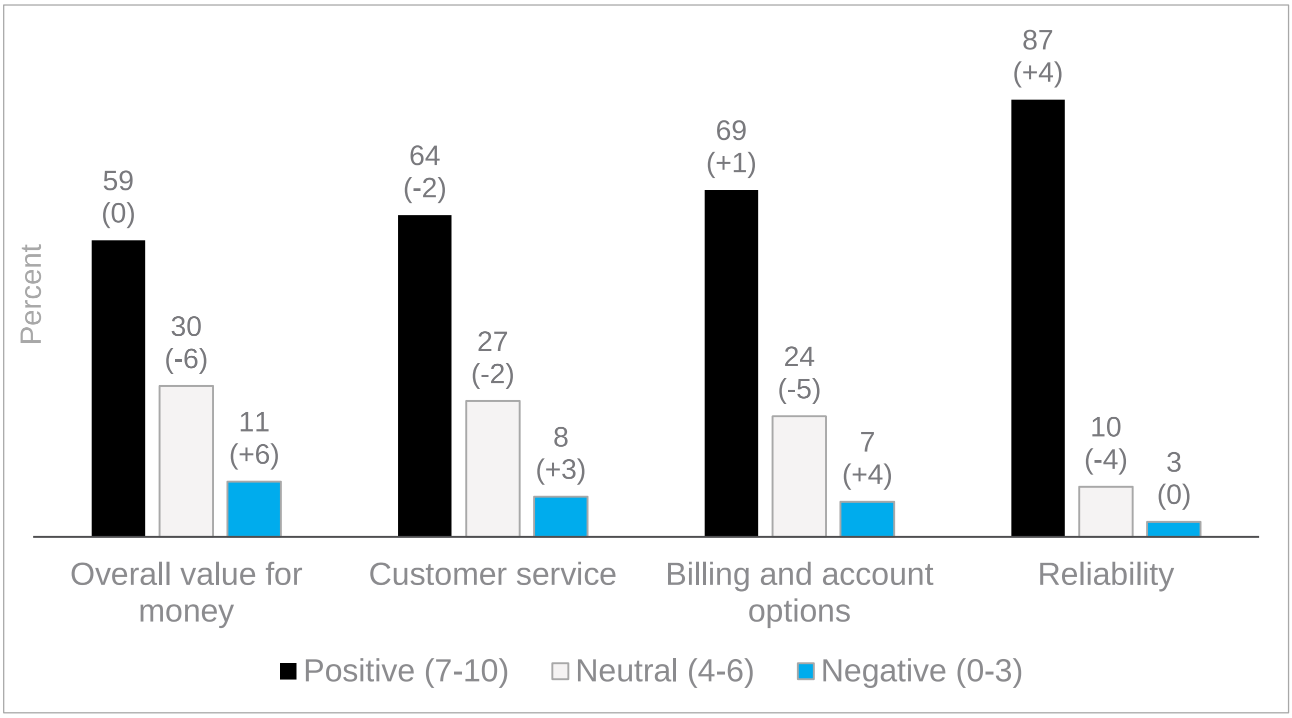
Satisfaction

Satisfaction with gas

Despite the decline in satisfaction with the reliability of electricity, satisfaction with the reliability of gas services is up.

- 87% of South Australian household consumers who have gas are satisfied with the reliability of gas services, up 4% on the March / April survey.
- All other movements for gas are within the margin of error.

"How would you rate the [attribute]"
0-10 scale, 0='very poor', 10='excellent'

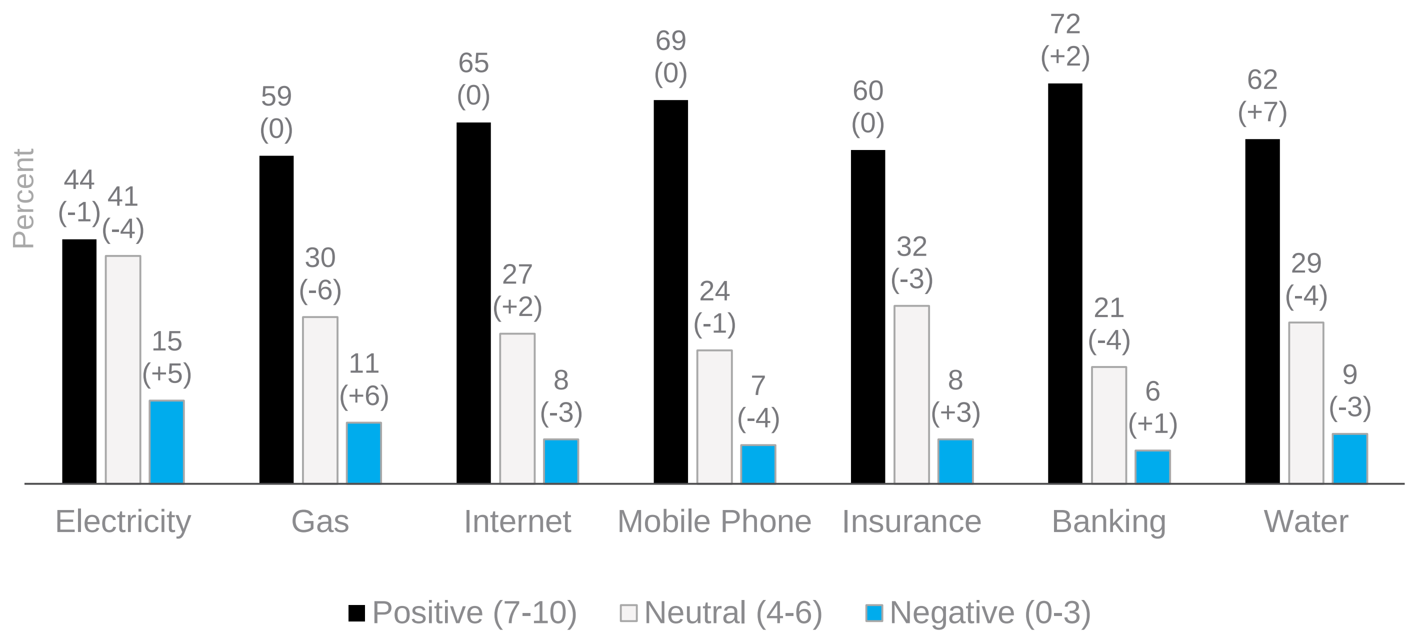


Satisfaction with utilities

South Australian household consumers in this survey are more likely than those in the last survey to rate the value for money of water positively.

- 62% now rate the value for money of water positively, up 7% on the last survey.
- The proportions satisfied with the value for money of other utilities are almost the same as in the last survey.

"How would you rate the [attribute]"
0-10 scale, 0='very poor', 10='excellent'



Confidence

Confidence in information and tools

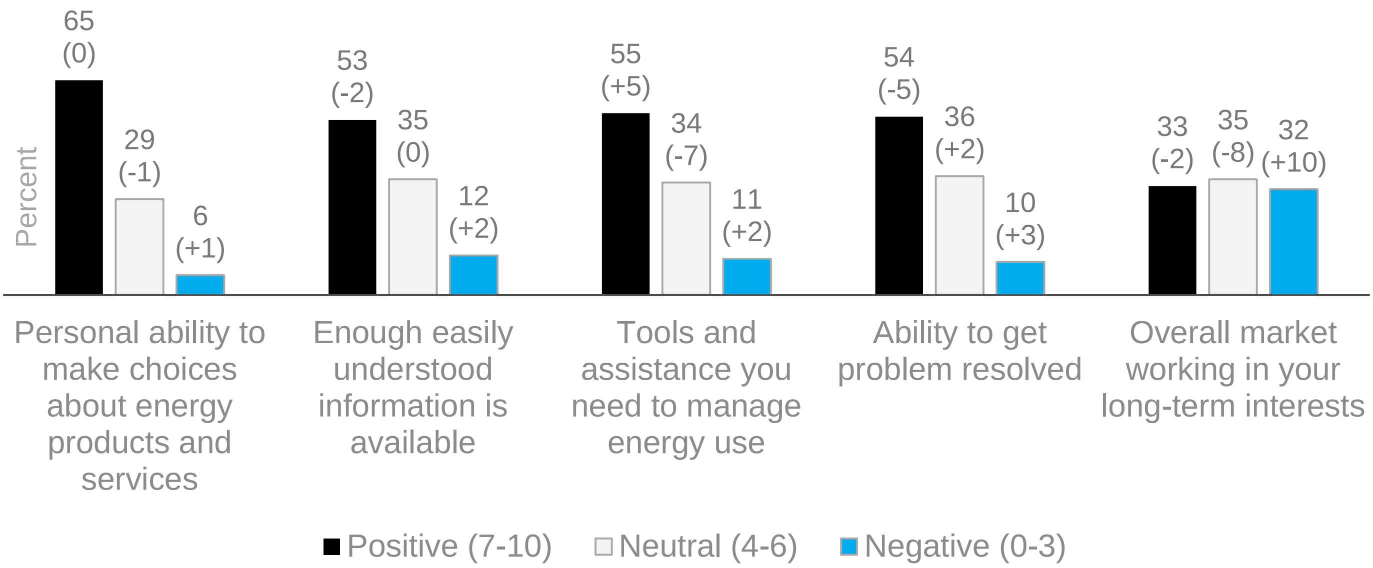
The proportion of South Australian household consumers saying they are confident in the tools and assistance to manage their energy use is higher in this survey.

- 55% are confident in this, a 5% increase.

There is, however, an equivalent decrease in the proportion saying that they are confident in their ability to get problems resolved.

- 54% are confident in this ability, down 5% since the last survey.

How would you rate the following:
0-10 scale, 0='very poor', 10='excellent'



Confidence

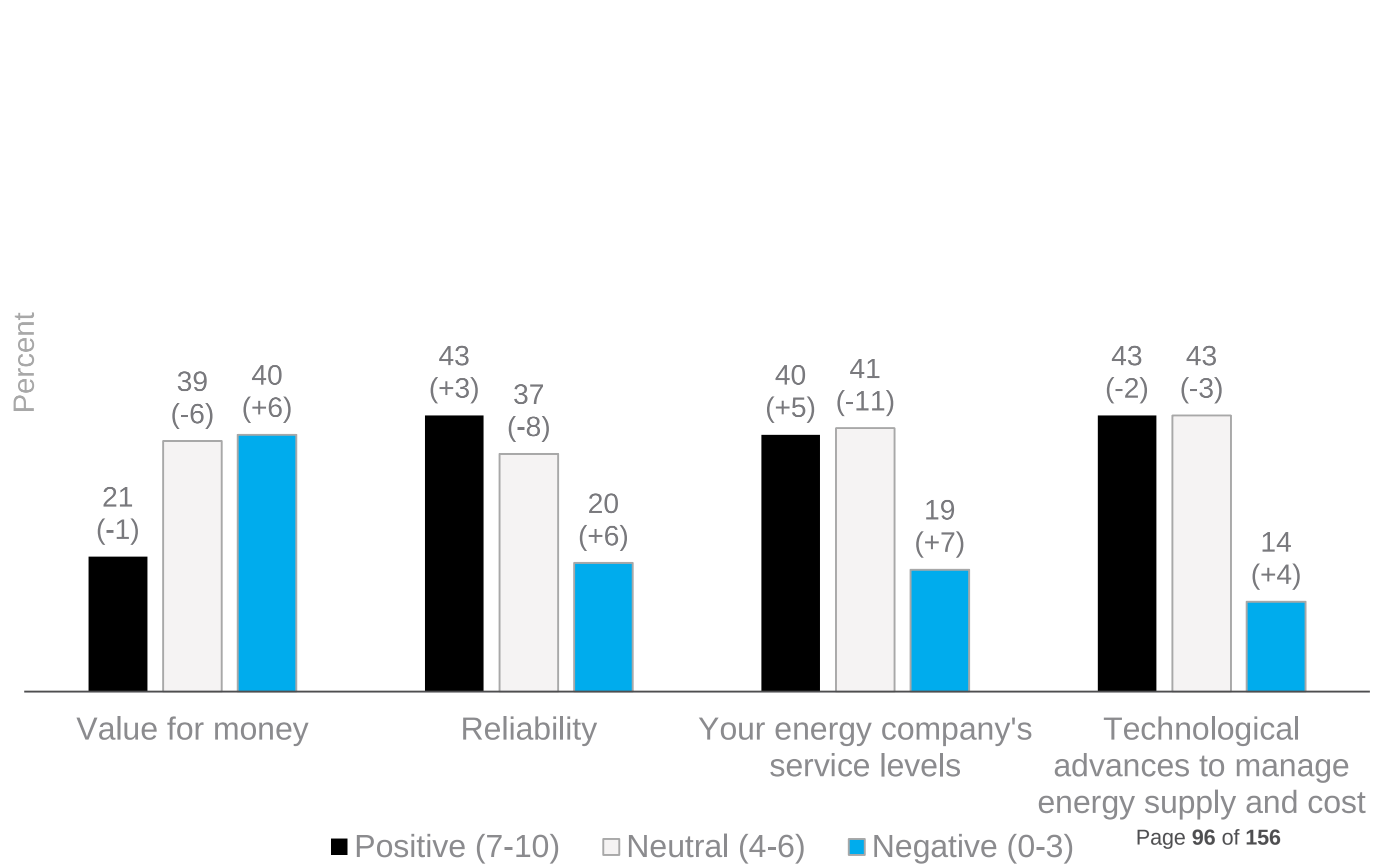
Confidence in long term outcomes

South Australian household consumers in this survey are more likely than those in the previous survey to feel confident that the market will provide better customer service, and also marginally more likely to feel confident it will increase reliability.

- 40% now say they are confident in better outcomes in terms of customer service, up 5% since the last survey.
- 43% are confident that the market will provide better outcomes for reliability. Although this is only a 3% increase, it is noteworthy because of the 8% fall in satisfaction with reliability at the moment. Such falls in satisfaction are often accompanied by drops in confidence.

"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…?"

0-10 scale, 0='not at all confident', 10='very confident'



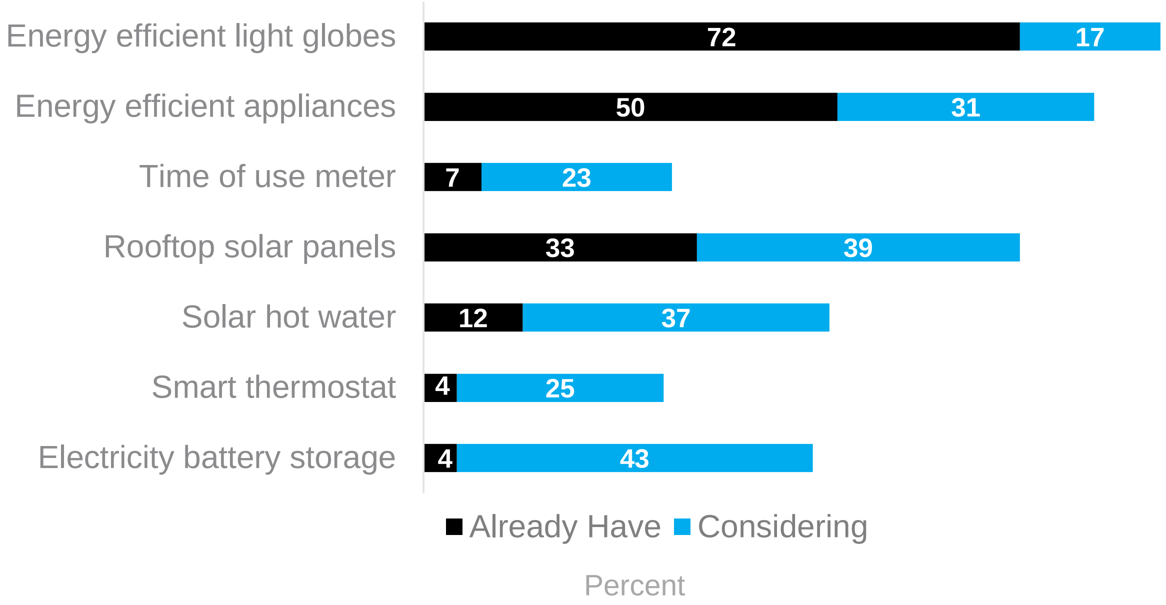
Activity

Uptake of technologies

South Australian household consumers in this survey are more likely than those in the last survey to say they are considering electricity battery storage.

- 43% now say they are considering this, up 7% since the last survey.
- This is worth noting because the percentage of household with rooftop solar is relatively high in South Australia.

"Are you considering purchasing or using any of the following technologies to manage the cost of electricity in your household?"



Activity

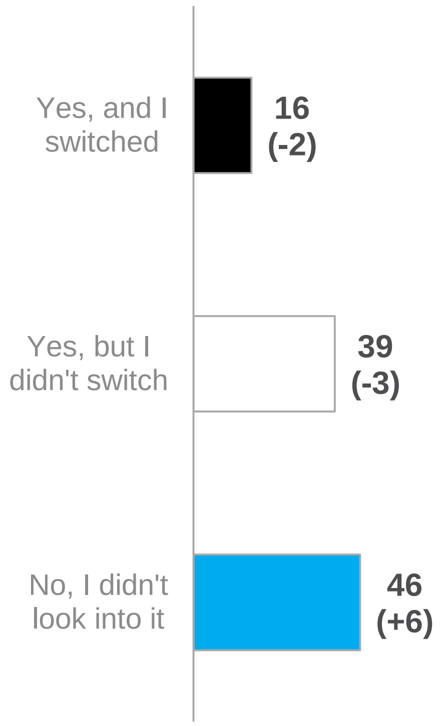
Switching behaviour

Although South Australian household consumers remain relatively likely to say they have at least considered switching in the last three years, the proportion who report doing so is down on the last survey.

- 55% report that they have at least considered switching, down 5% on the March / April survey.
- This includes 16% who have actually switched (down 2%) and 39% who considered switching but did not do so (down 3%).

Previous behaviour

"Have you looked into or researched your options for switching energy companies or energy plans in the last 3 years?"



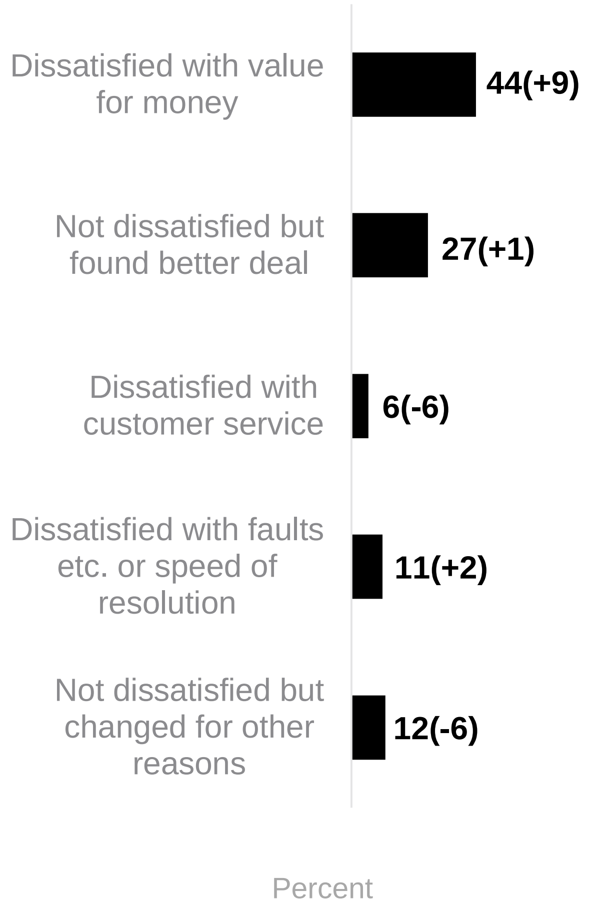
Activity

Reasons for switching

Value for money continues to dominate the reasons for South Australian household consumers looking at their options.

- 44% of those who looked at switching say this was because they were dissatisfied with the value for money they were getting, up 9% on the last survey.

Which of the following best describes your reasons for considering switching?



Base: South Australian household consumers who considered switching in the last 3 years (n=169)

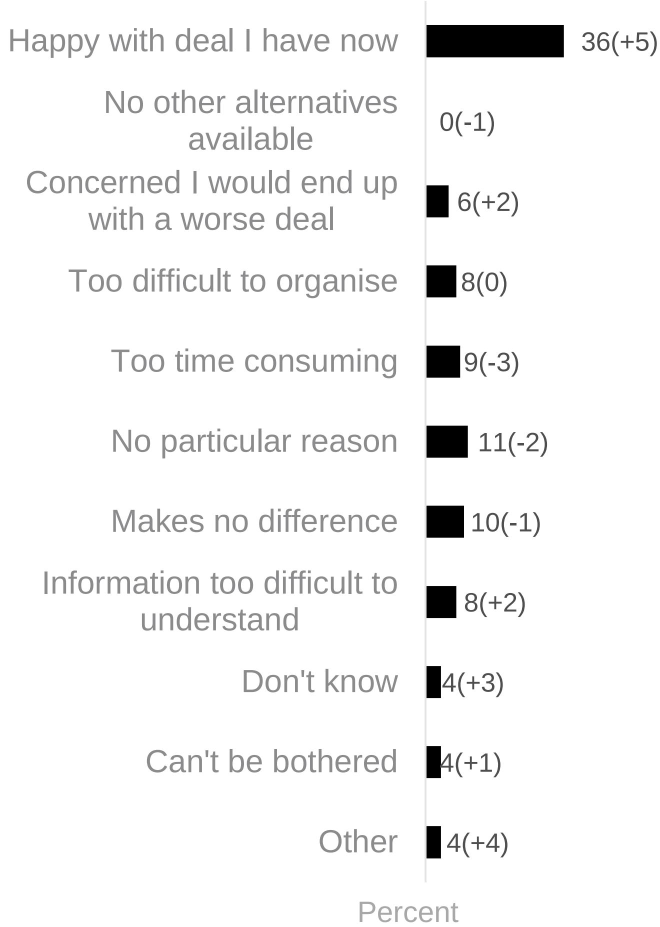
Activity

Reasons for not switching

Those who have not considered switching have become a little more likely (given the margin of error) to say they have not considered it simply because they are satisfied with the deal they have now.

- 36% cite satisfaction with the deal they have now as the main reason for not considering switching, up 5% on the last survey.
- 10% say that they had not looked at switching because there were no other alternatives available or that it made no difference (down 2%).
- 25% say that the barriers are too high (too difficult, too time consuming or too difficult to understand), down 1%.

Which of the following best describes your reasons for not considering switching?



Base: South Australian household consumers who had not considered switching in the last 3 years (n=142)

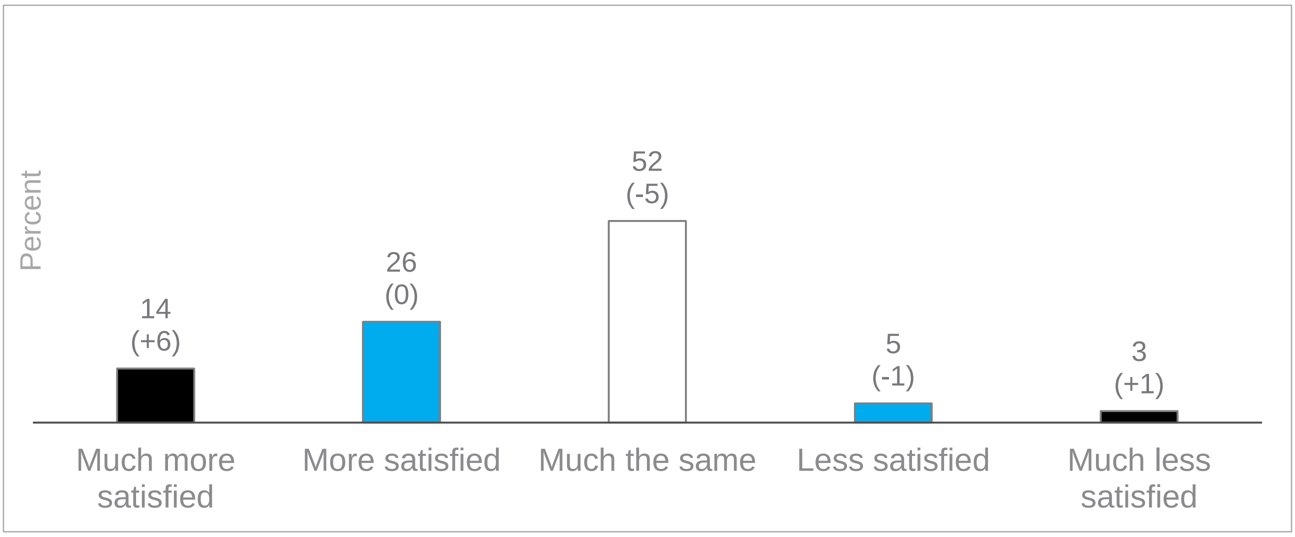
Activity

Satisfaction after considering switching

The proportion of South Australian household consumers saying that considering switching increased their satisfaction with the value for money they receive at the moment is up since the last survey.

- 40% now say that looking made them more satisfied, up 6% on the last survey.

"After looking at options for switching energy companies or plans, would you say you are more satisfied, less satisfied or much the same with the value for money you are receiving, compared with before you looked at your options?"



Base: South Australian household consumers who considered switching in the last 3 years (n=169)

Activity

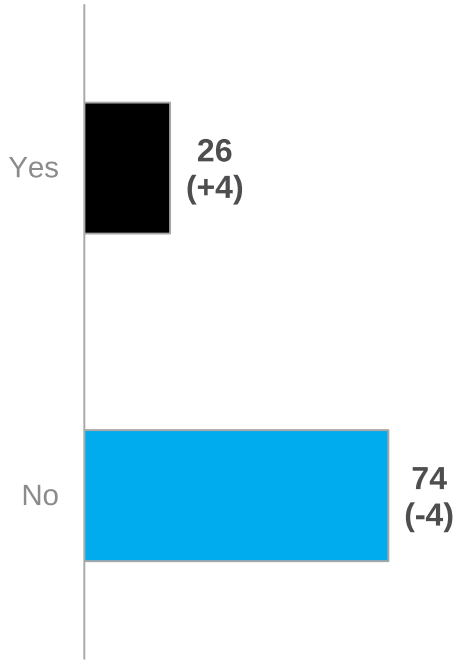
Switching intentions

South Australian household consumers in this survey are a little more likely than those in the last survey to say they intend to switch energy companies or plans in the year ahead.

- 26% expect to do so, up 4% on the March / April survey.
- South Australia is now equal with NSW as the state or territory where household consumers are most likely to be considering switching.

Future Intentions

"Do you intend to switch energy companies or energy plans in the next year?"



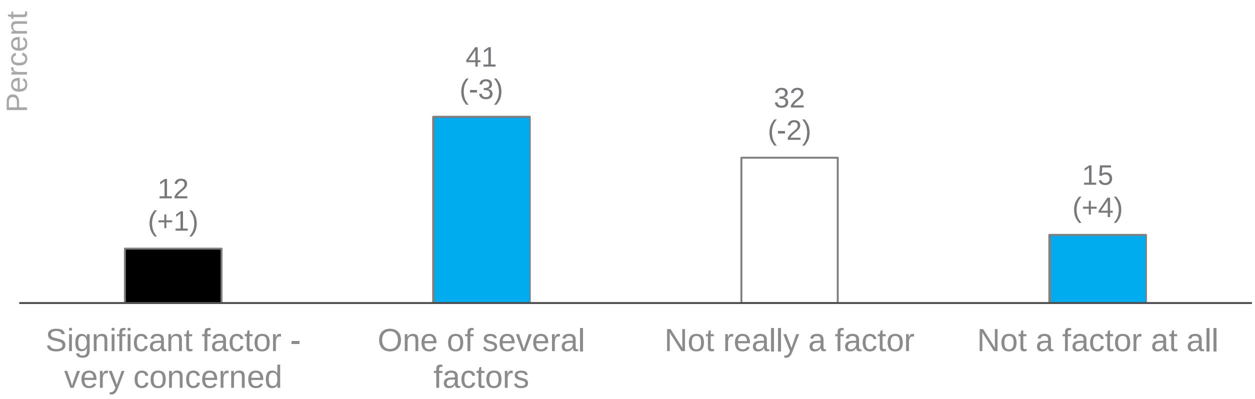
Activity

Consideration of the environment

53% of South Australian household consumers in this survey say that the environment is a factor they consider when making decisions about energy products and services.

- 12% say that it is one of the most important factors (up 1%), while 41% consider it to be one of several factors (down 3%).

"How much does your own personal concern about the environment impact on your decisions about energy products and services?"



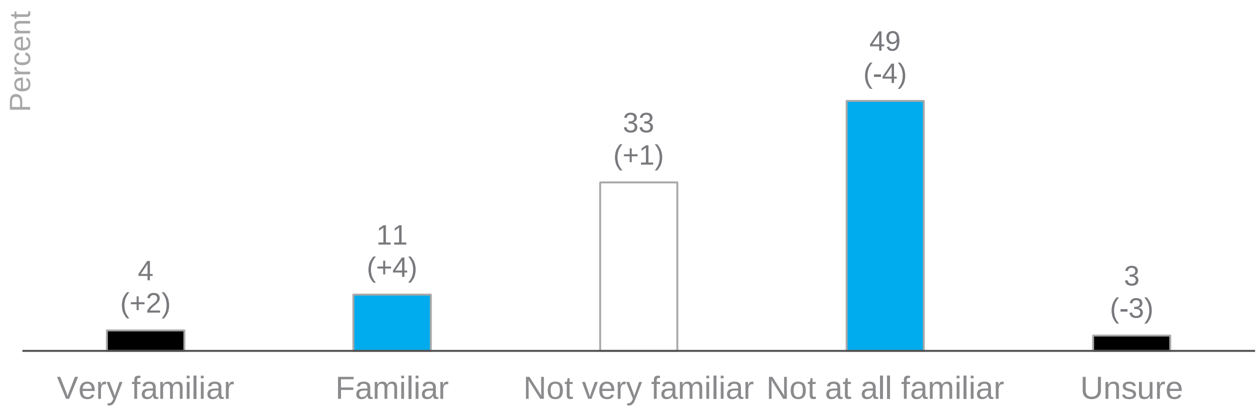
Other

Awareness of ECA

The proportion of South Australian household consumers claiming to be familiar with Energy Consumers Australia remains low, but is higher than in the previous survey.

- 15% now claim to be very familiar or familiar with Energy Consumers Australia, up 6% on the March / April survey.

"How familiar are you with an organisation called Energy Consumers Australia?"



Tasmania

Satisfaction

Overall satisfaction

Overall satisfaction ratings from Tasmanian household consumers are down from the last survey.

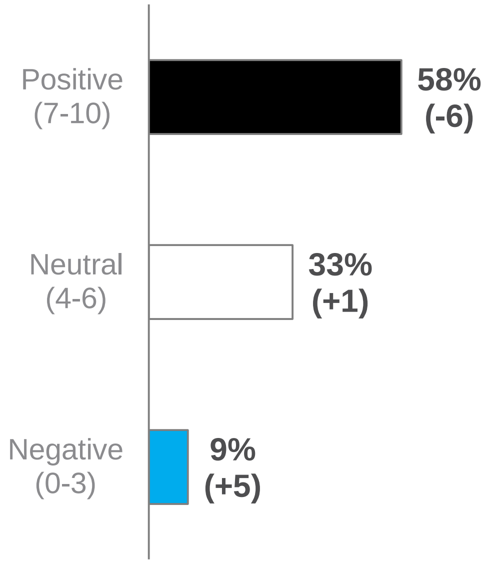
- 58% rate their satisfaction as 7 or higher out of 10, a drop of 6% since the March / April survey.
- This is the lowest for all the states and territories.

Satisfaction with the levels of competition in Tasmania was low in the last survey, and this continued in the August / September survey.

- 15% are positive about the level of competition in Tasmania (down 1%) and 20% are neutral (down 2%)
- 65% are dissatisfied (up 3%).

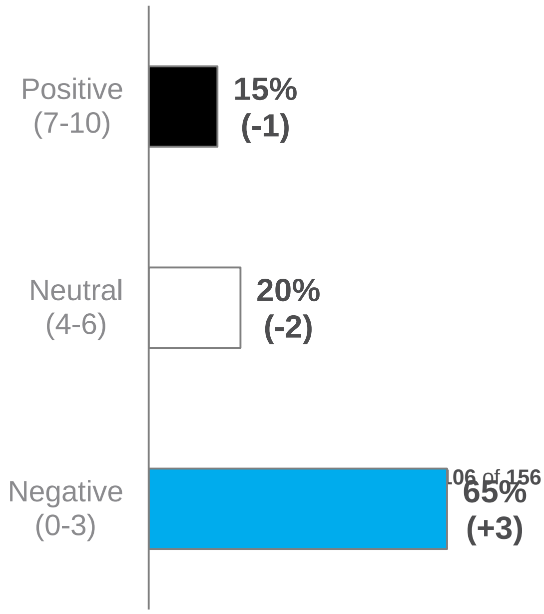
Overall satisfaction

How satisfied are you with the provision of your electricity and gas services overall in the last 6 months?



Satisfaction with competition

How satisfied are you with the level of competition in the energy market in your area?



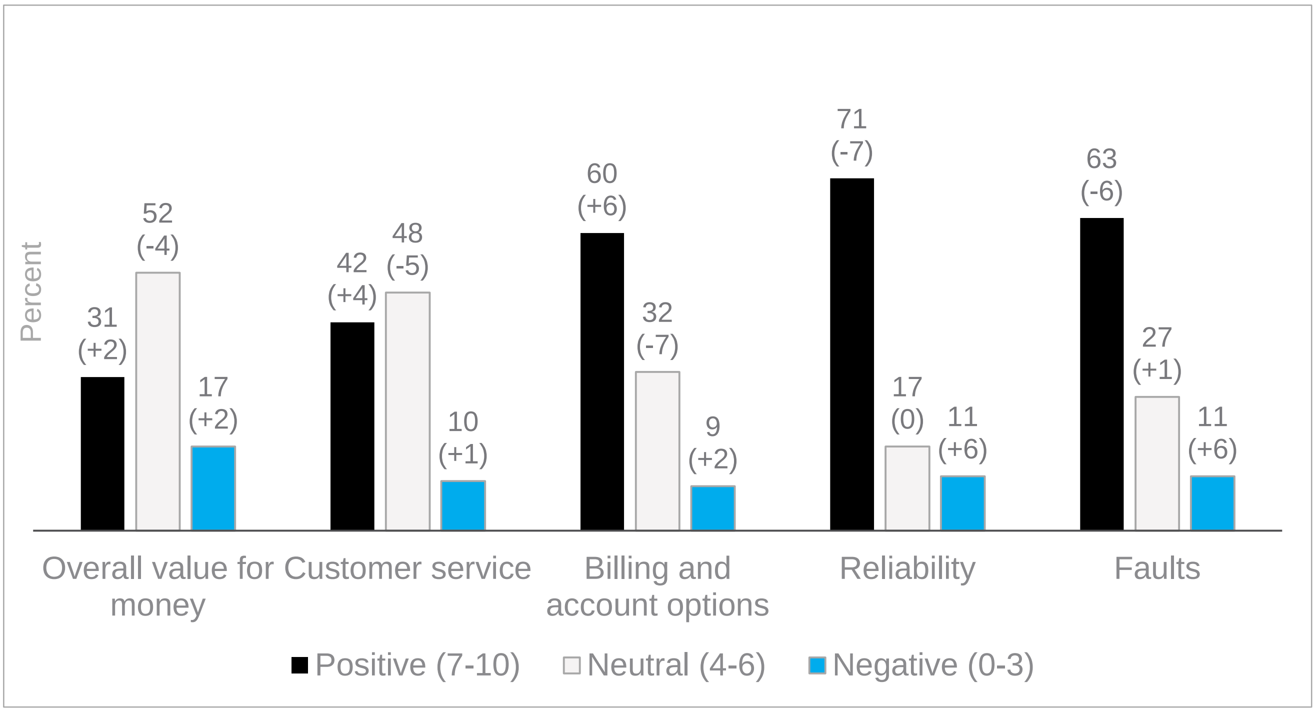
Satisfaction

Satisfaction with electricity

Tasmanian household consumers in this survey are less satisfied than those in the previous survey with reliability and faults, but there are signs of increase with service and billing.

- 71% say they are satisfied with the reliability of electricity (down 7% since March / April) and 63% are satisfied with the way faults have been handled (down 6%). Given the Basslink disruption, these percentages remain reasonably high.
- 60% are satisfied with the billing of electricity (up 6%) and 42% are satisfied with customer service (up 4%).

"How would you rate the [attribute]"
0-10 scale, 0='very poor', 10='excellent'



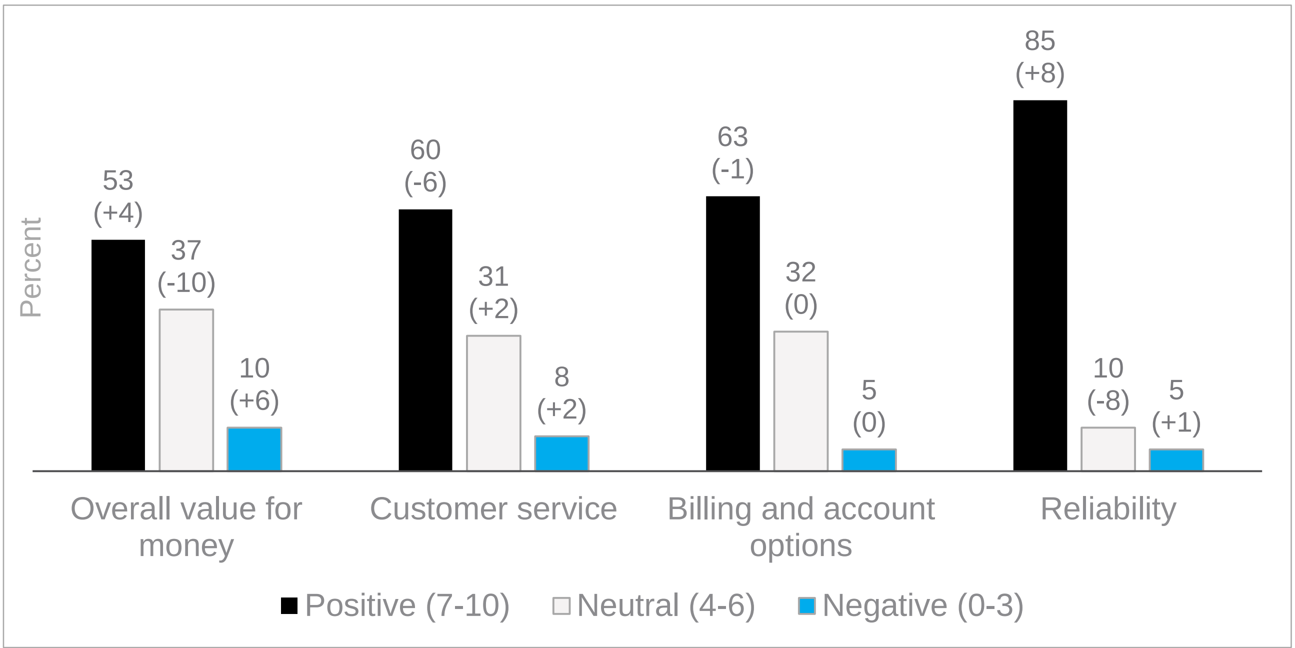
Satisfaction

Satisfaction with gas

Tasmanian household consumers with gas rate the reliability of gas higher than their counterparts in the last survey.

- 85% are now satisfied with the reliability of gas, up 8% on the March / April survey.
- There is a 4% increase in the proportion satisfied with the value for money of gas, but a 6% decline in the proportion satisfied with customer service.
- These changes need to be treated with caution because of the small sample size.

"How would you rate the [attribute]"
0-10 scale, 0='very poor', 10='excellent'



Base: Tasmanian consumers with gas (n=55)
INDICATIVE ONLY: SMALL SAMPLE SIZE

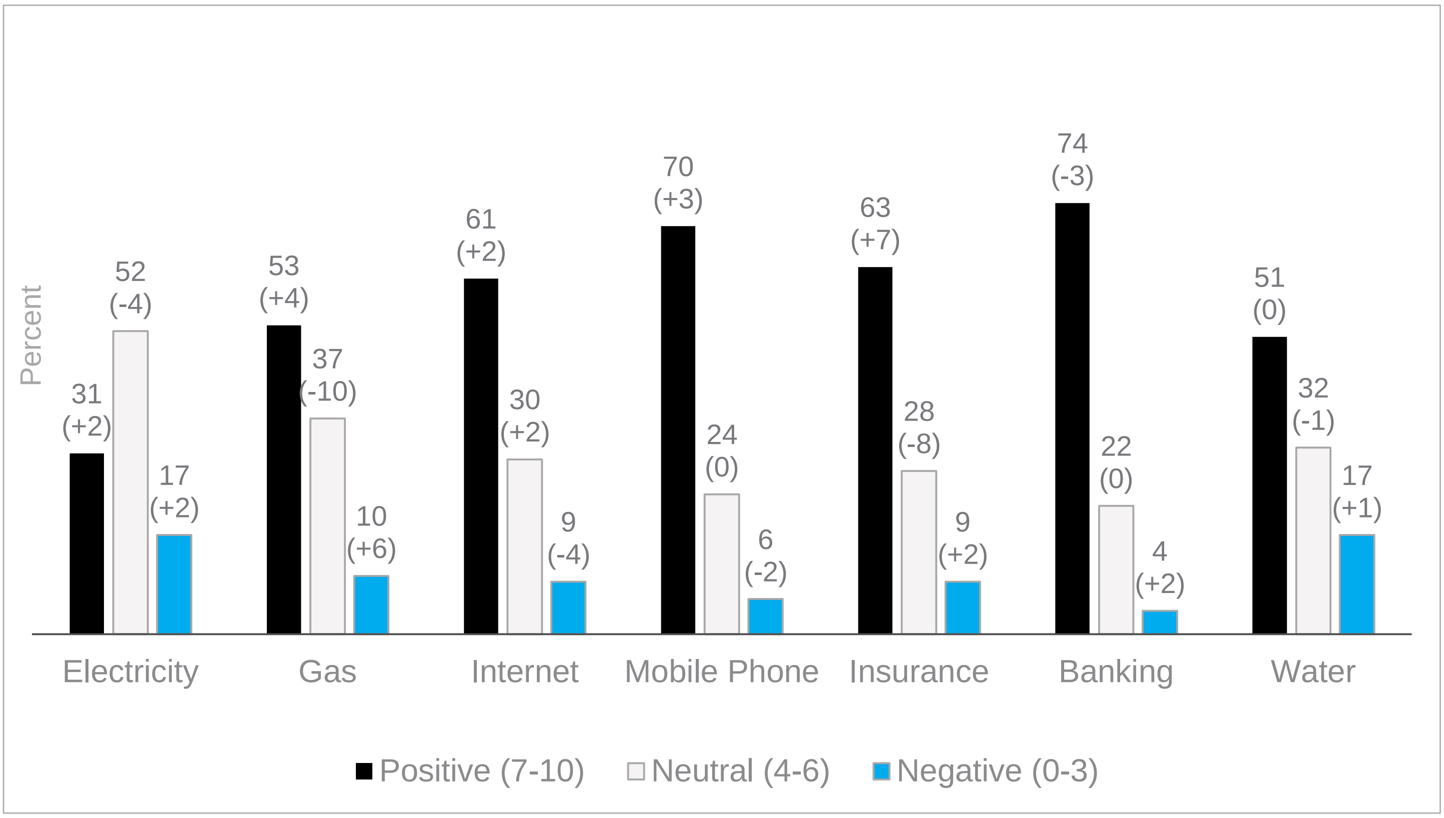
Satisfaction

Satisfaction with utilities

The gap between electricity and other services in terms of value for money shows no real sign of closing for Tasmanian household consumers.

- 63% of Tasmanian household consumers now rate the value for money of insurance services positively, up 7% since the March / April survey.

"How would you rate the [attribute]"
0-10 scale, 0='very poor', 10='excellent'



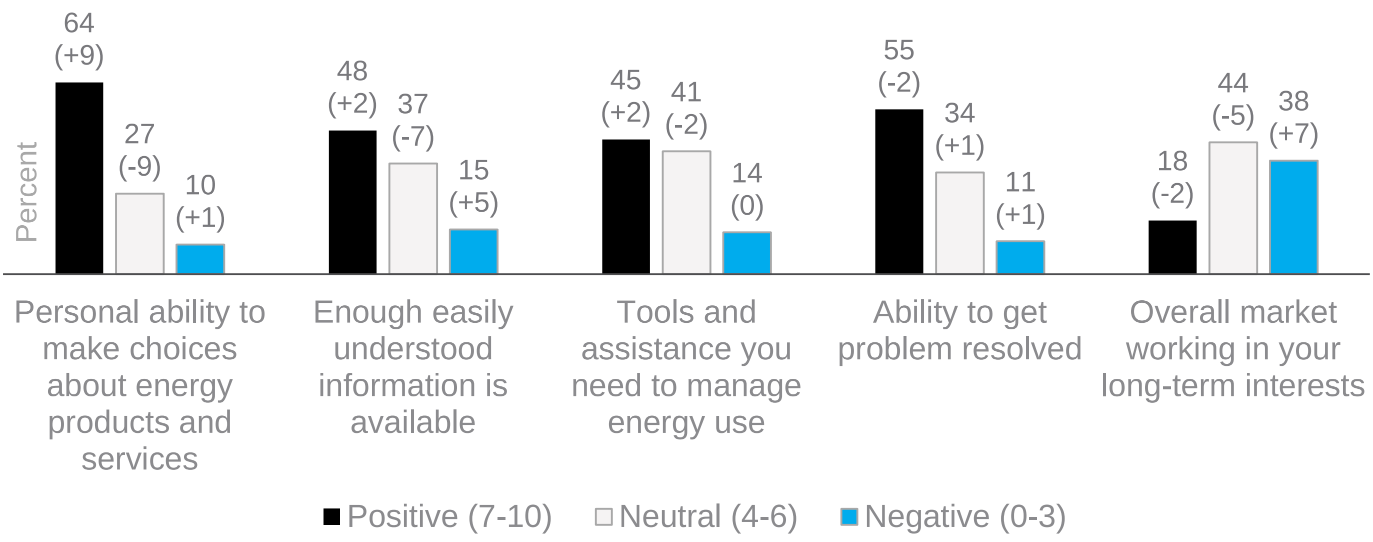
Confidence

Confidence in information and tools

The proportion of Tasmanian household consumers who feel confident in their own ability to make choices on energy issues is up in this survey.

- 64% rate their confidence as 7 or more out of 10, up 9% on the last survey.
- The rest of the changes on these attributes are within the margin of error.

"How would you rate the following:"
0-10 scale, 0='very poor', 10='excellent'



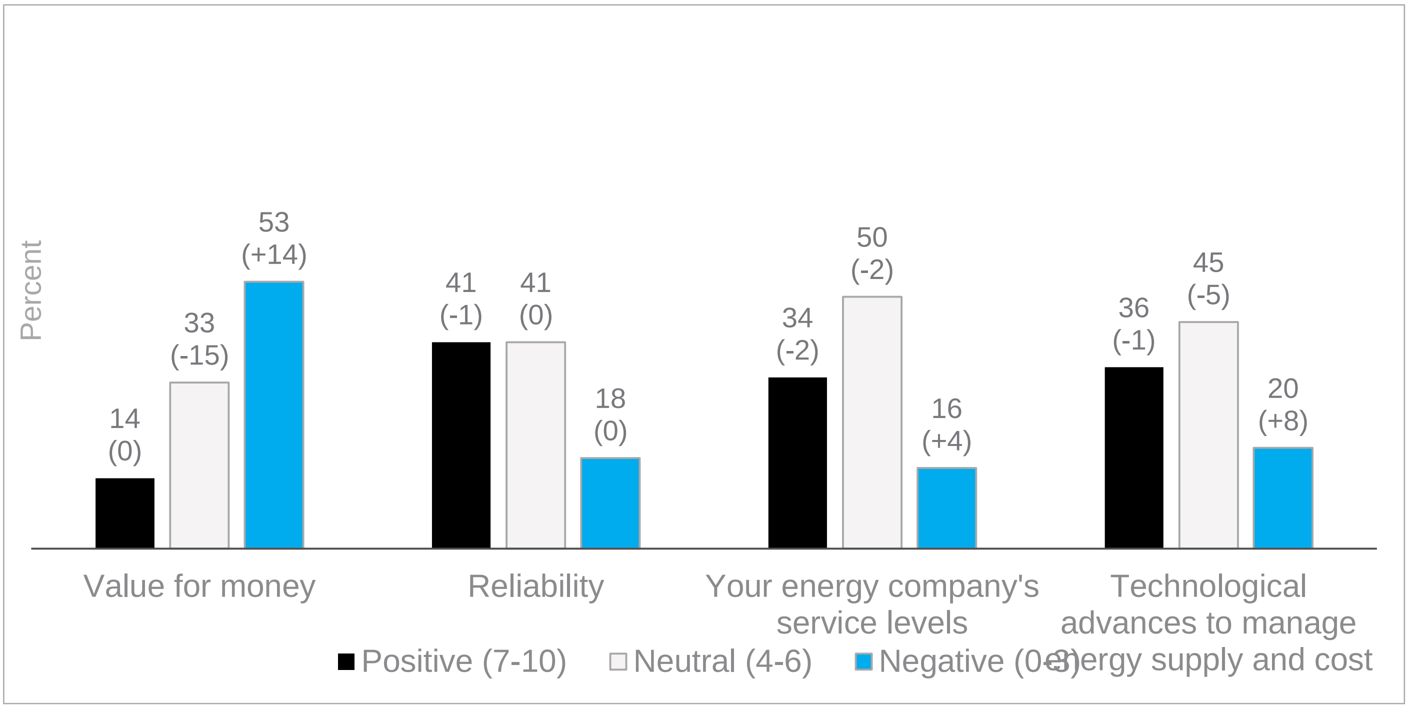
Confidence in long term outcomes

The proportion of Tasmanian household consumers expressing confidence in specific market outcomes (i.e. giving positive ratings) is about the same as in the last survey, but there are signs of consumers shifting from neutral to negative perceptions.

- The proportion of Tasmanian household consumers who are confident that the market will deliver better value for money is unchanged on 15%, but there is a 14% increase in the proportion with negative expectations for value for money.
- Similarly, the proportion with negative expectations in terms of technological advances is up 8%.

"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…?"

0-10 scale, 0='not at all confident', 10='very confident'



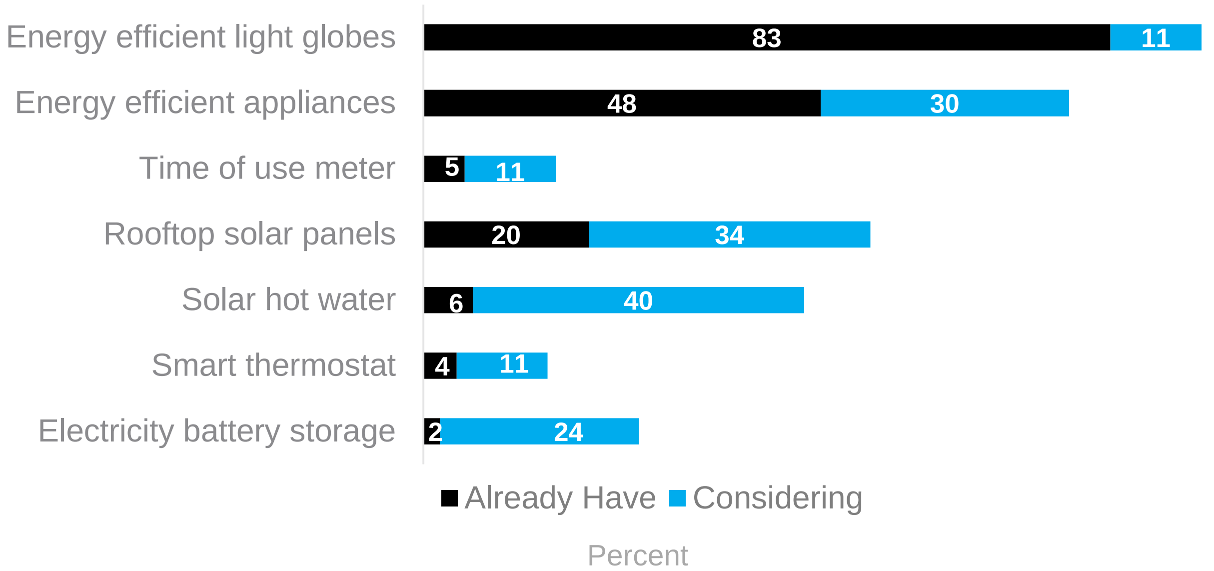
Activity

Uptake of technologies

Tasmanian household consumers in this survey are less likely than those in the previous survey to be considering energy efficient light globes, time of use meters, smart thermostats and electricity battery storage.

- 11% are considering energy efficient light globes (down 7%).
- 11% are considering time of use meters (down 8%) and 11% are looking at smart thermostats (down 7%).
- 24% are considering battery storage (down 8%).

"Are you considering purchasing or using any of the following technologies to manage the cost of electricity in your household?"



Activity

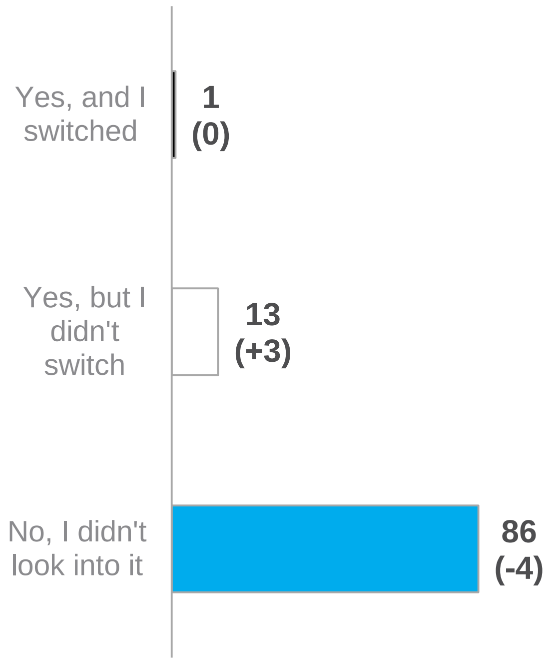
Switching behaviour

Small consumers in Tasmania have a single electricity retailer and 2 gas retailers. Although there is a marginal increase in the proportion of Tasmanian household consumers reporting considering changing companies or plans in the last three years, a clear majority still have not.

- 1% say that they actually switched (unchanged from the last survey), while 13% looked at doing so but did not (up 3%).

Previous behaviour

"Have you looked into or researched your options for switching energy companies or energy plans in the last 3 years?"



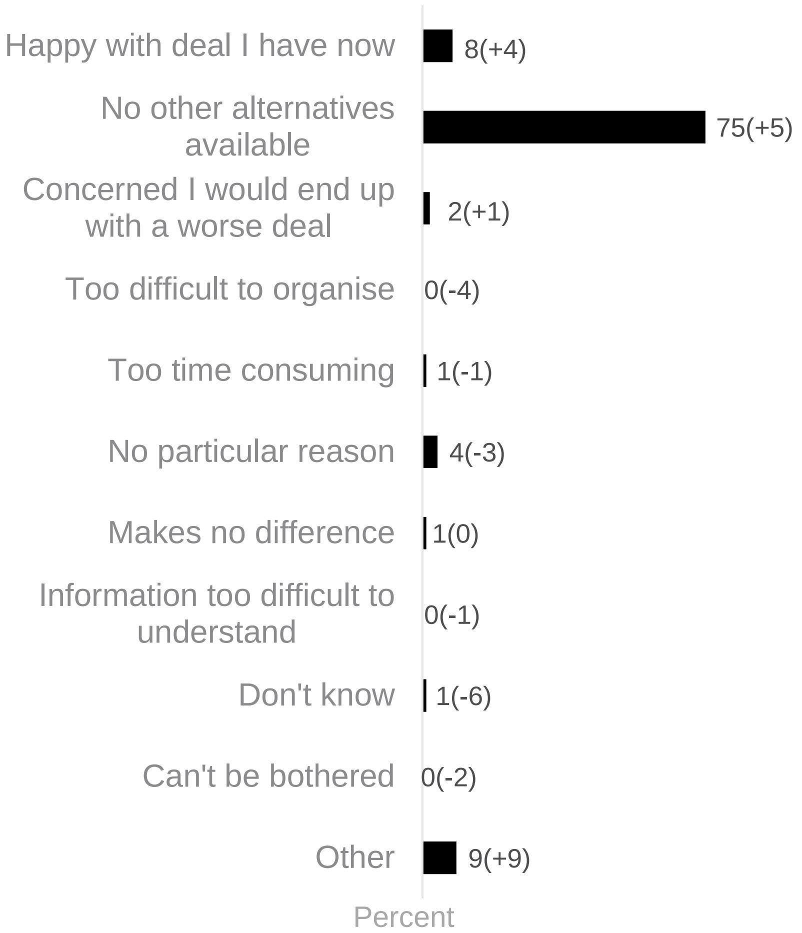
Activity

Which of the following best describes your reasons for not considering switching?

Reasons for not switching

The belief that there are no alternatives remains the main reason Tasmanian household consumers give for not considering switching.

- 75% say that this is the main reason, up 5% since the last survey, with a further 1% saying that it made no difference.



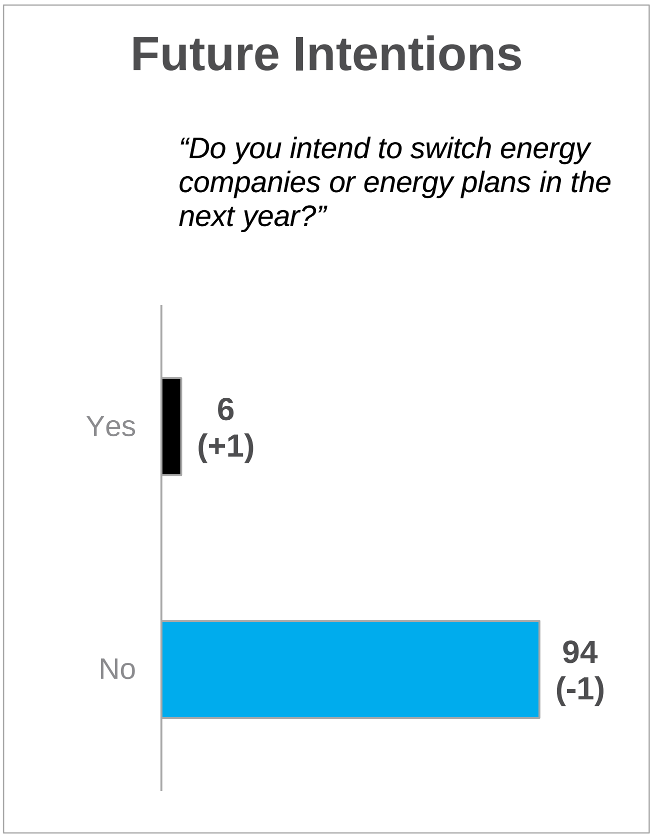
Base: Tasmanian household consumers who had not considered switching in the last 3 years (n=162)

Activity

Switching intentions

Just 6% of Tasmanians say they intend to switch energy companies or plans in the year ahead.

- This is 1% above the result from the March / April survey.



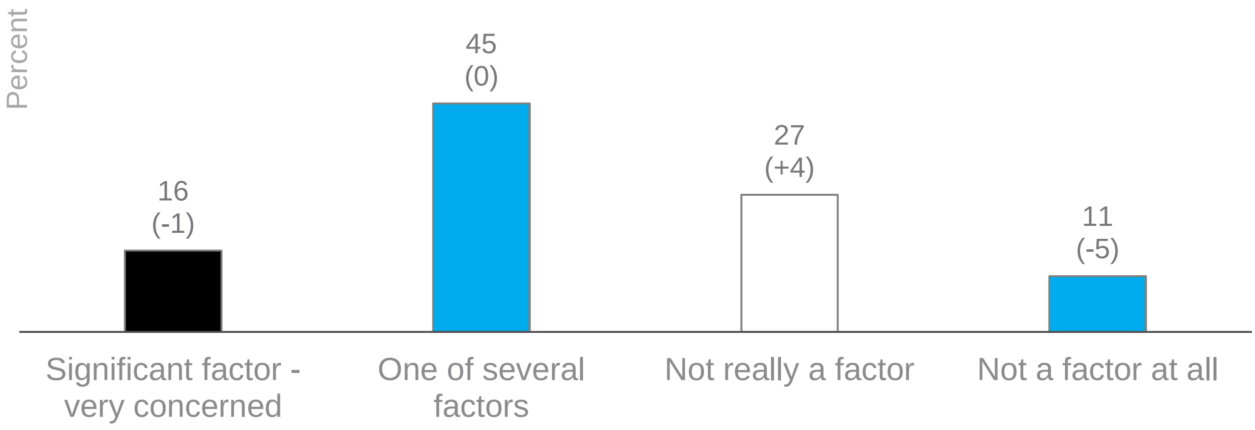
Activity

Consideration of the environment

Tasmanian household consumers in this survey were as likely as those in the previous survey to say they considered the environment in decisions about energy products and services.

- 16% say that it is one of the most important factors, down 1% on the March / April survey.
- 45% consider it to be one of several factors (unchanged).

"How much does your own personal concern about the environment impact on your decisions about energy products and services?"



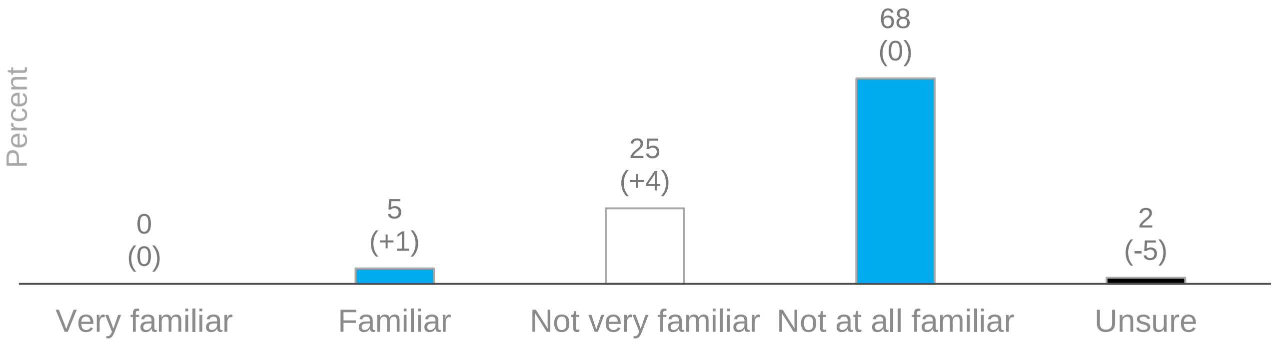
Other

Awareness of ECA

As was found in the previous survey, very few Tasmanian household consumers claim to be familiar with Energy Consumers Australia.

- None say that they are very familiar (unchanged on the previous survey), and only 5% claim to be familiar (up 1%).

"How familiar are you with an organisation called Energy Consumers Australia?"



Australian Capital Territory

Satisfaction

Overall satisfaction

The proportion of ACT household consumers satisfied with the provision of their electricity and gas services is in line with the previous survey, although the proportion with neutral opinions is higher.

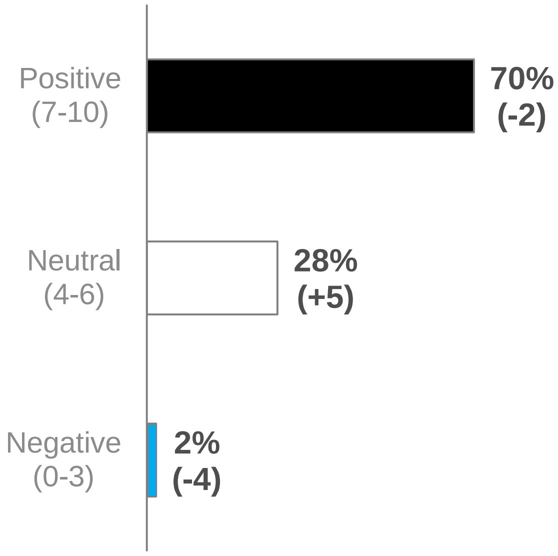
- 70% rate their satisfaction as 7 or higher out of 10 (down 2%). This is nonetheless the highest for any state or territory in this survey.

Satisfaction with competition is still fairly low, but higher than in the last survey.

- 28% of ACT household consumers are satisfied with the level of competition (up 5%).
- 38% are neutral (down 7%) and 34% are negative (down 2%).

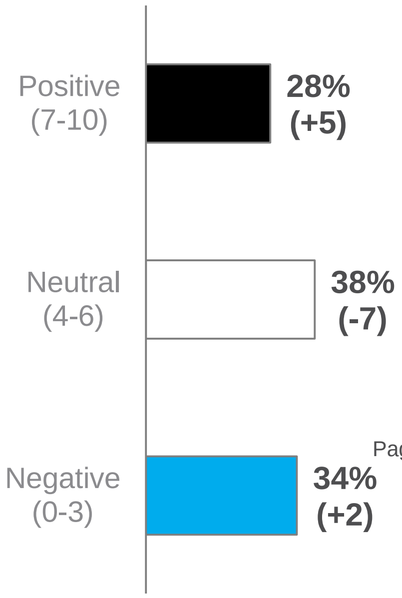
Overall satisfaction

"How satisfied are you with the provision of your electricity and gas services overall in the last 6 months?"



Satisfaction with competition

"How satisfied are you with the level of competition in the energy market in your area?"



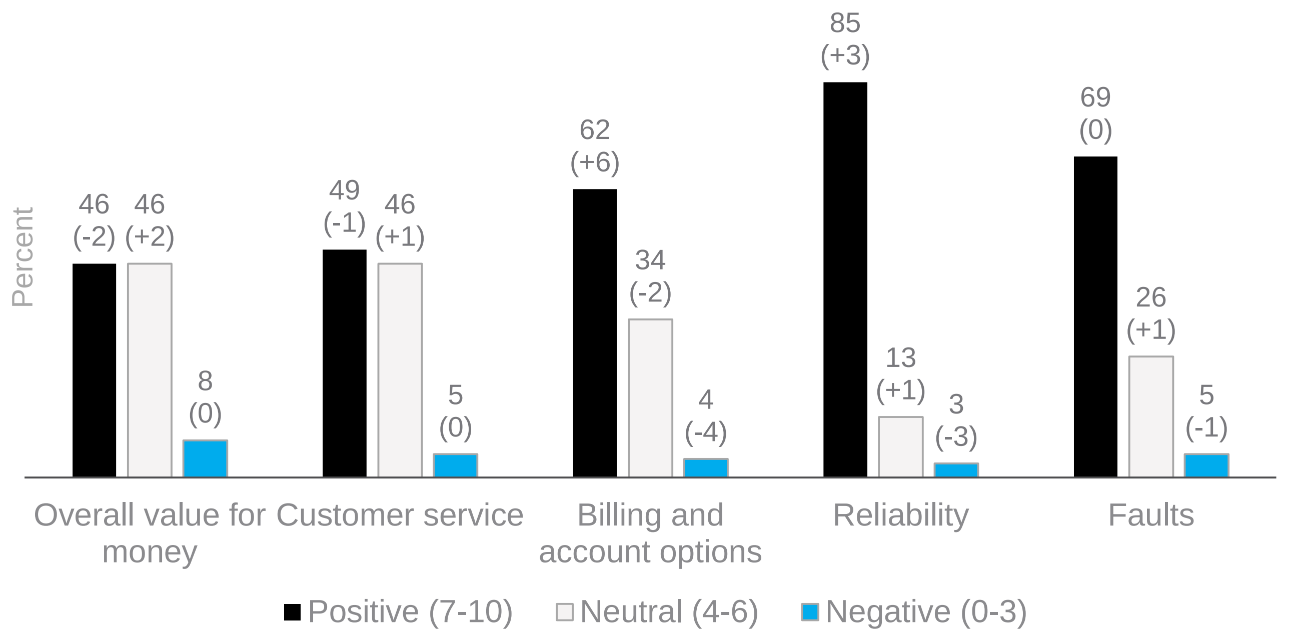
Satisfaction

Satisfaction with electricity

ACT household consumers in this survey give higher ratings than those in the last survey for the billing and account options electricity.

- 62% now rate this positively, up 6% since the last survey.
- There is a marginal increase in ratings for reliability (up 3% to 85%).

"How would you rate the [attribute]"
0-10 scale, 0='very poor', 10='excellent'



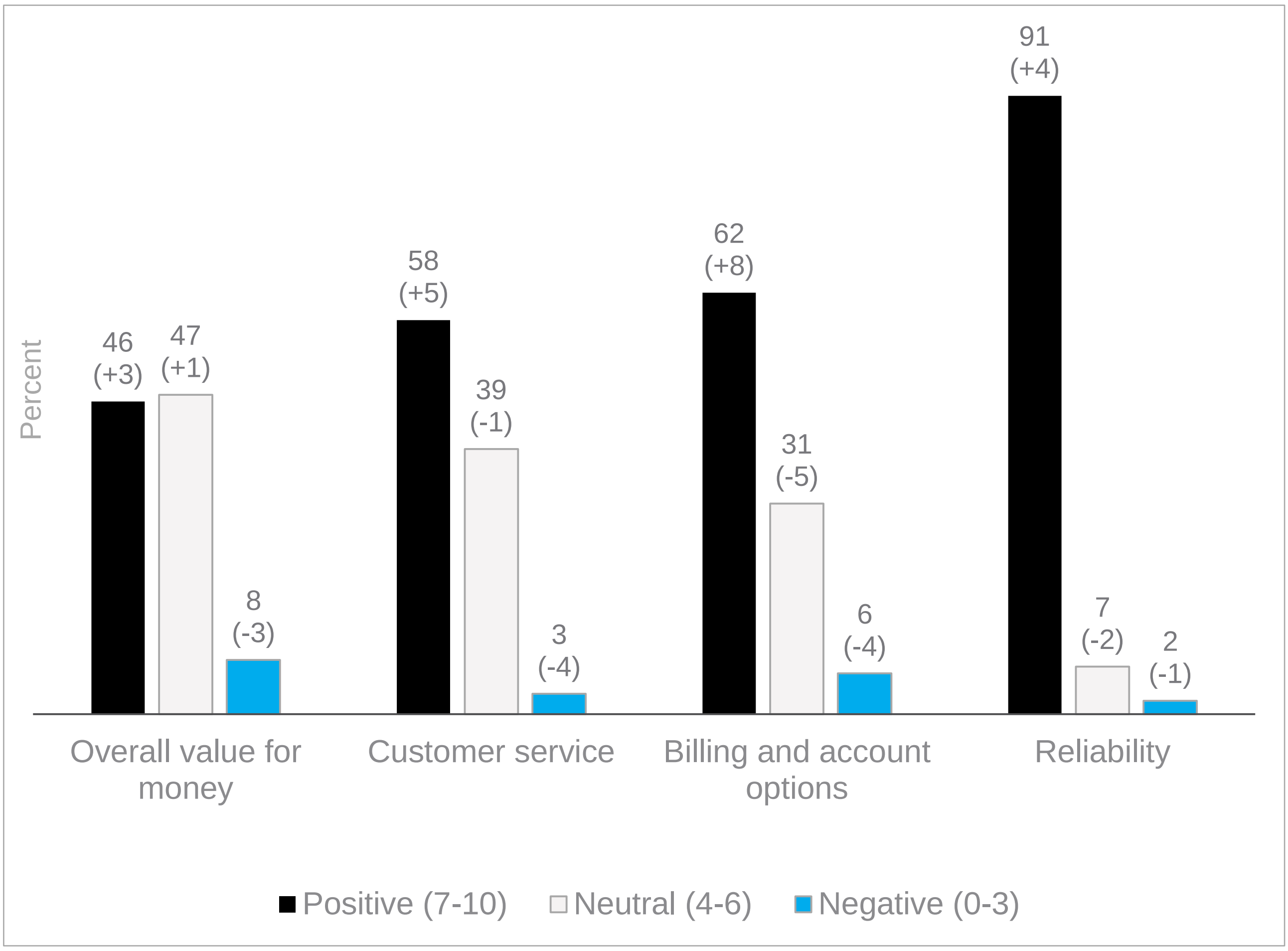
Satisfaction

Satisfaction with gas

Ratings for gas are up at least a little for all four of these measures.

- The largest change is an 8% increase in the proportion of ACT household consumers with gas (now 62%).

"How would you rate the [attribute]"
0-10 scale, 0='very poor', 10='excellent'



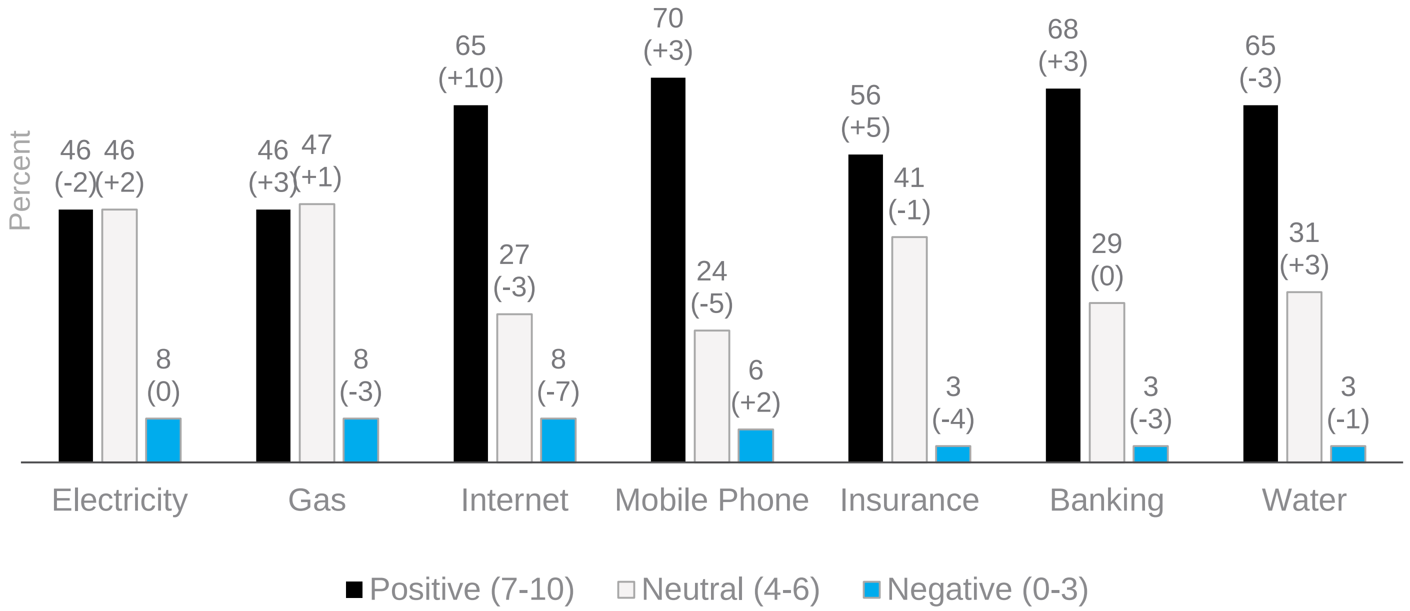
Satisfaction

Satisfaction with utilities

Perceived value for money is up for most services tested in this survey, with the biggest increase being for internet services.

- 65% of ACT household consumers now say they are satisfied with the value for money of internet services, up 10% since the March / April survey.

"How would you rate the [attribute]"
0-10 scale, 0='very poor', 10='excellent'



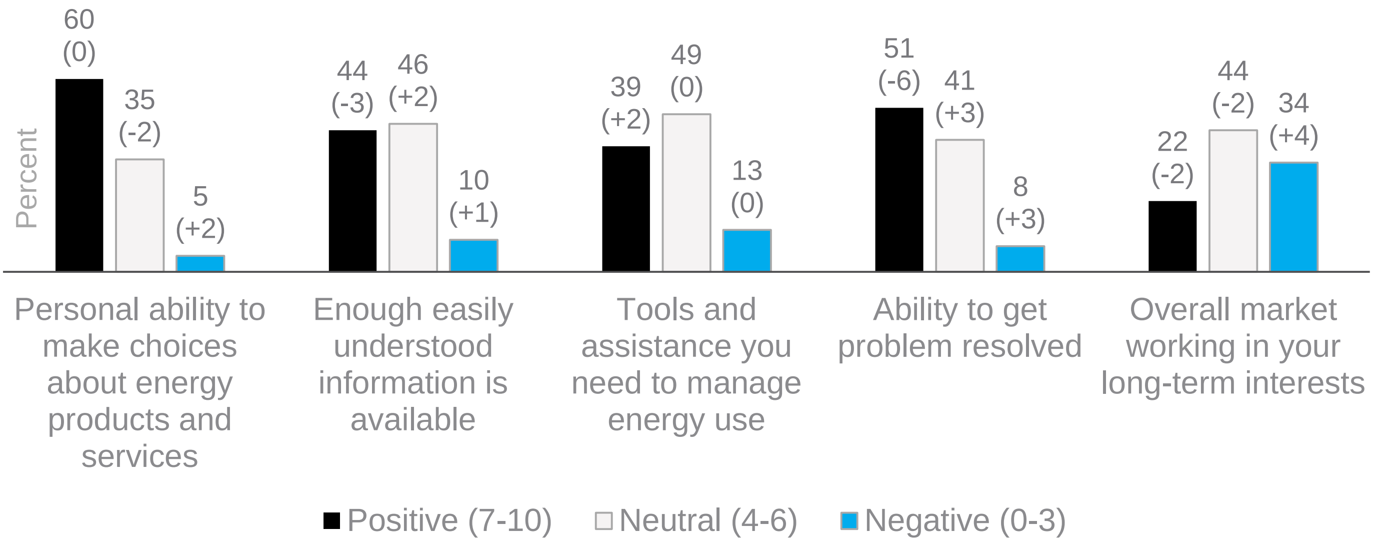
Confidence

Confidence in information and tools

ACT household consumers in this survey are less likely than those in the last survey to say they are confident in their ability to get problems with their energy company resolved.

- 51% say they are confident in this, down 6% on the March / April survey.

"How would you rate the following:"
0-10 scale, 0='very poor', 10='excellent'

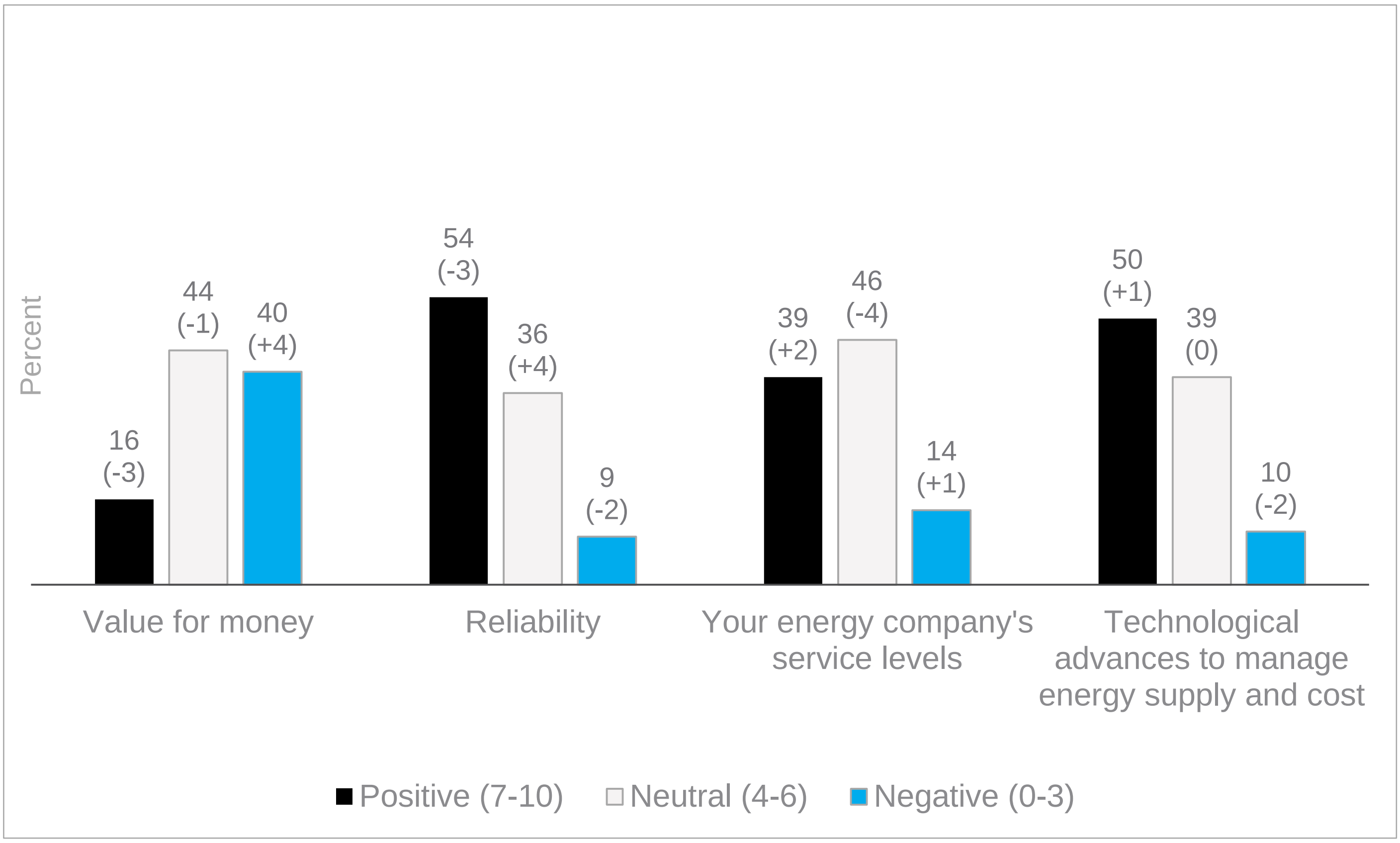


Confidence in long term outcomes

The movements below are within the margin of error for ACT household consumers.

"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…?"

0-10 scale, 0='not at all confident', 10='very confident'



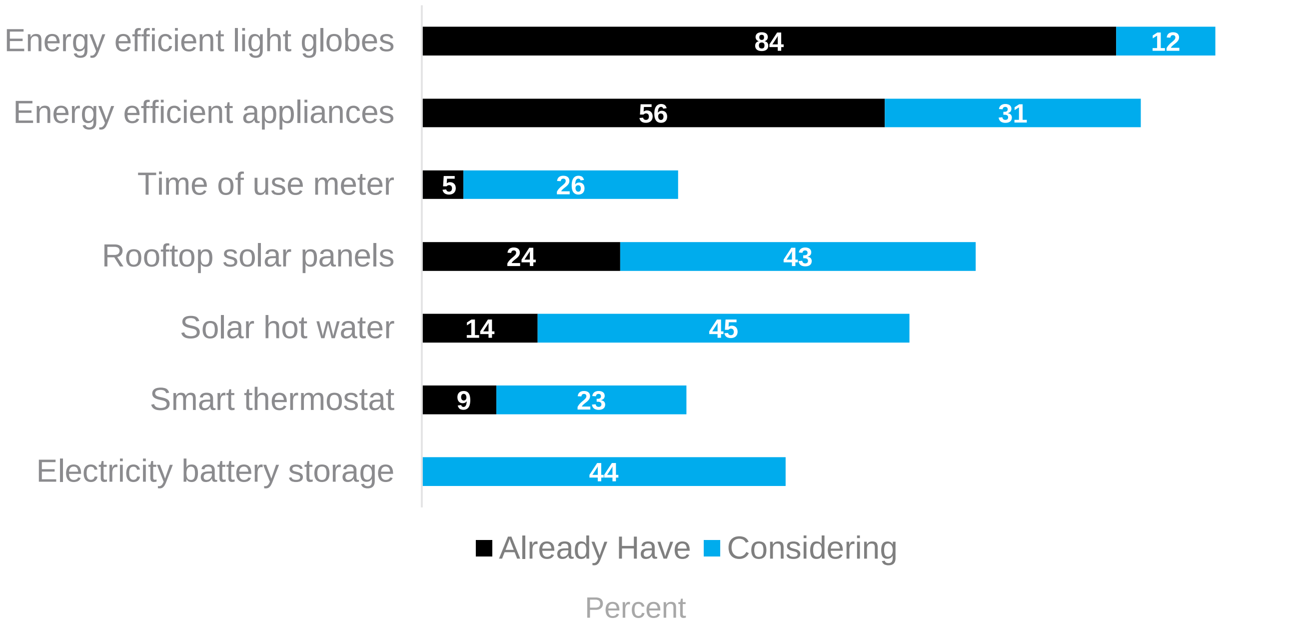
Activity

Uptake of technologies

The proportion of ACT household consumers saying they are currently considering them is down for several of these technologies.

- There are 9% falls in the proportions saying that they are currently considering energy efficient light globes, energy efficient appliances and time of use meters.
- There is also a 6% decrease in the proportion saying they are considering smart thermostats.

"Are you considering purchasing or using any of the following technologies to manage the cost of electricity in your household?"



Activity

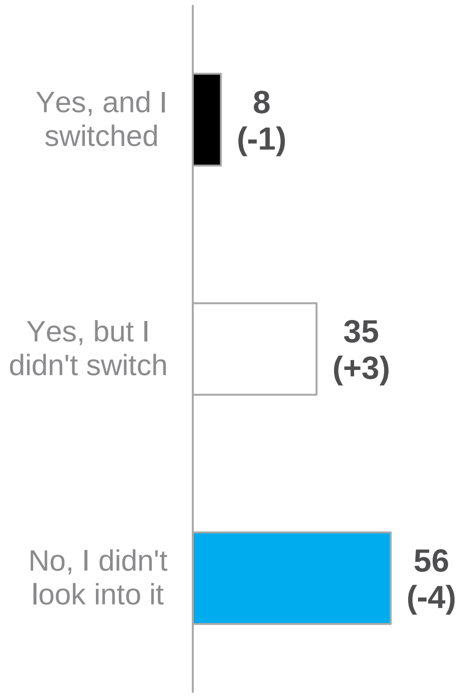
Switching behaviour

The proportion of ACT household consumers who have considered switching in the last three is about the same as in the last survey.

- 8% say that they have actually switched (down 1%).
- 35% claim to have considered switching but not done so (up 3%).

Previous behaviour

“Have you looked into or researched your options for switching energy companies or energy plans in the last 3 years?”



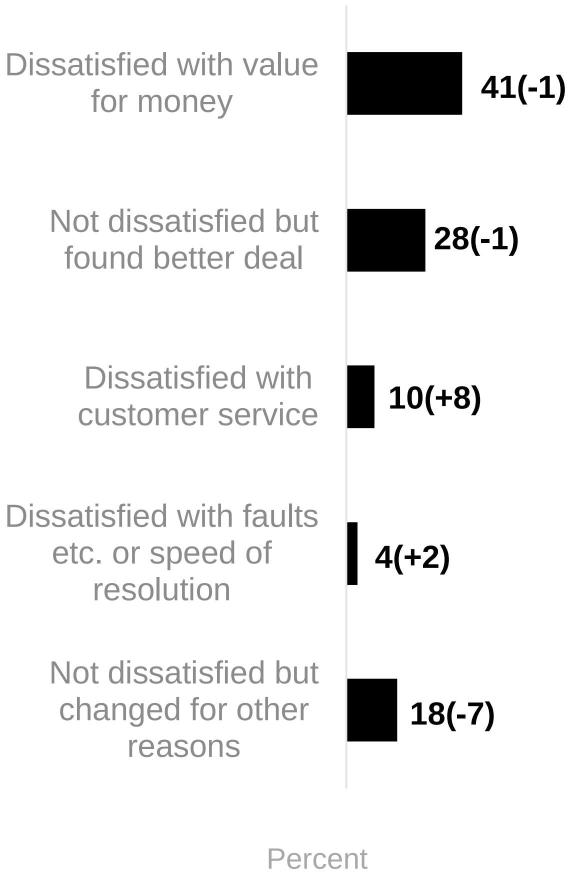
Activity

Reasons for considering switching

Although value for money continues to be cited by ACT household consumers as the main reason for considering switching, the largest movement is for dissatisfaction with customer service.

- 10% now say that this is the main reason they considered switching, up 8% on the last survey.

Which of the following best describes your reasons for considering switching?



Base: ACT household consumers who considered switching in the last 3 years (n=82).

INDICATIVE ONLY: SMALL SAMPLE SIZE

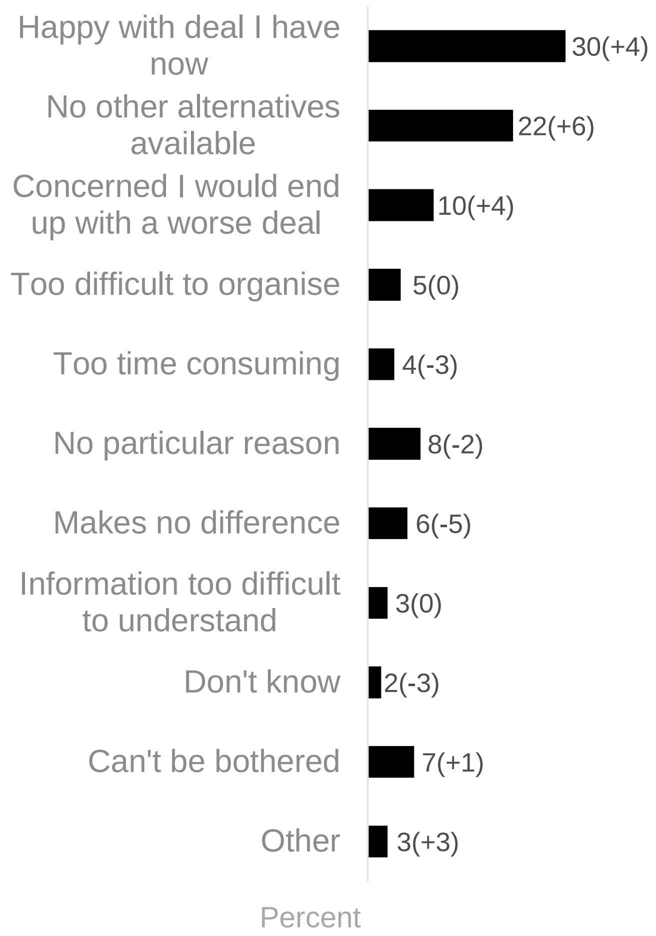
Activity

Reasons for not switching

ACT household consumers in this survey are more likely than those in the last survey to say that they have not switched either because they are satisfied with the deal they have now or because there are no alternatives available.

- 30% say they have not considered switching because they are satisfied with the deal they have now.
- 28% now say that they have not considered switching because there are no other alternatives available or it makes no difference (up 1%).
- 12% say that the barriers are too high (too difficult, too time consuming or too difficult to understand), down 3%.

Which of the following best describes your reasons for not considering switching?

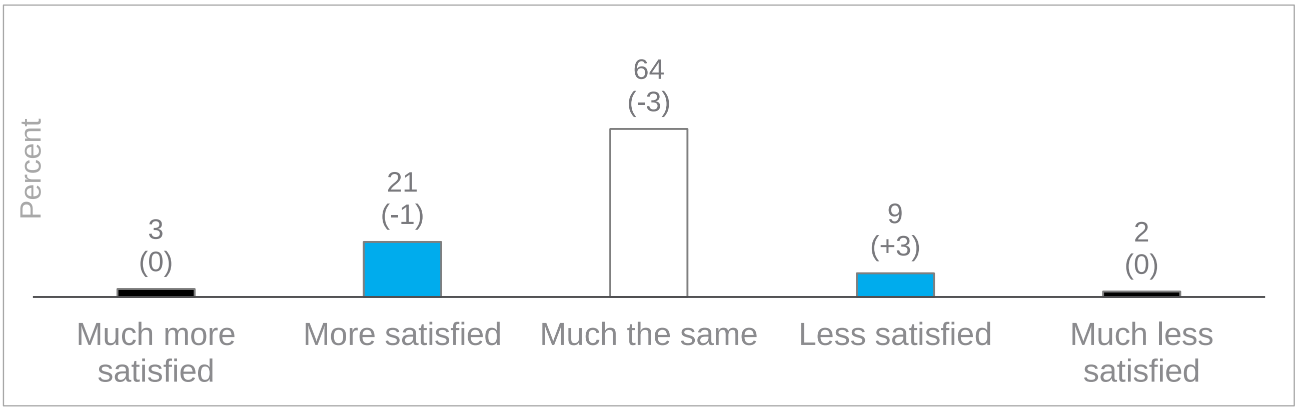


Base: ACT household consumers who had not considered switching in the last 3 years (n=106)

Satisfaction after considering switching

The movements below are within the margin of error for ACT household consumers. While the results are reported here, the sample size is small so is indicative only.

"After looking at options for switching energy companies or plans, would you say you are more satisfied, less satisfied or much the same with the value for money you are receiving, compared with before you looked at your options?"



Base: ACT household consumers who considered switching in the last 3 years (n=82)

INDICATIVE ONLY: SMALL SAMPLE SIZE

Activity

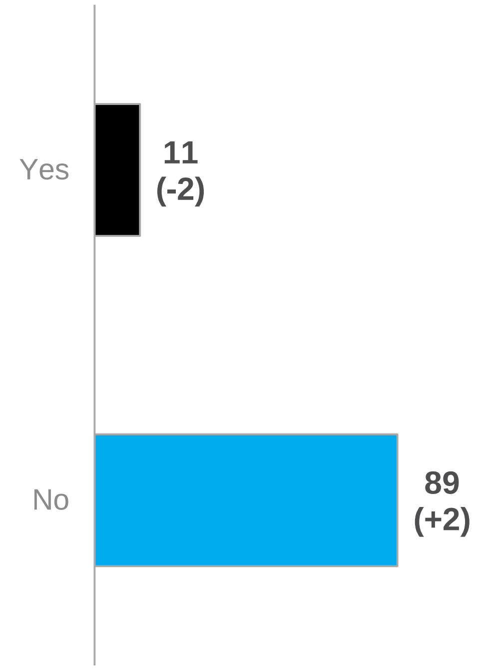
Switching intentions

As in the previous survey, few ACT household consumers are currently intending to switch companies or plans in the year ahead.

- 11% say that they intend to switch in the year ahead, down 2% on the March / April survey.

Future Intentions

“Do you intend to switch energy companies or energy plans in the next year?”



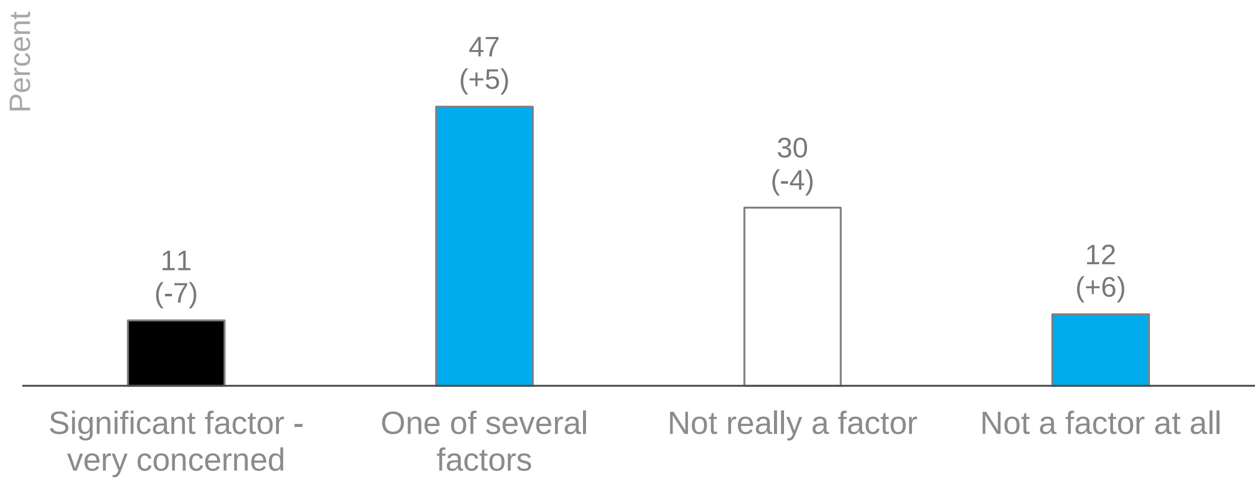
Activity

Consideration of the environment

ACT household consumers in this survey put somewhat less emphasis on the environment than those in the previous survey.

- 11% now say that the environment is a very significant factor in their decisions, down 7% since the March / April survey.
- 47% state that it is one of several factors they consider (up 5%).

> ***"How much does your own personal concern about the environment impact on your decisions about energy products and services?"***



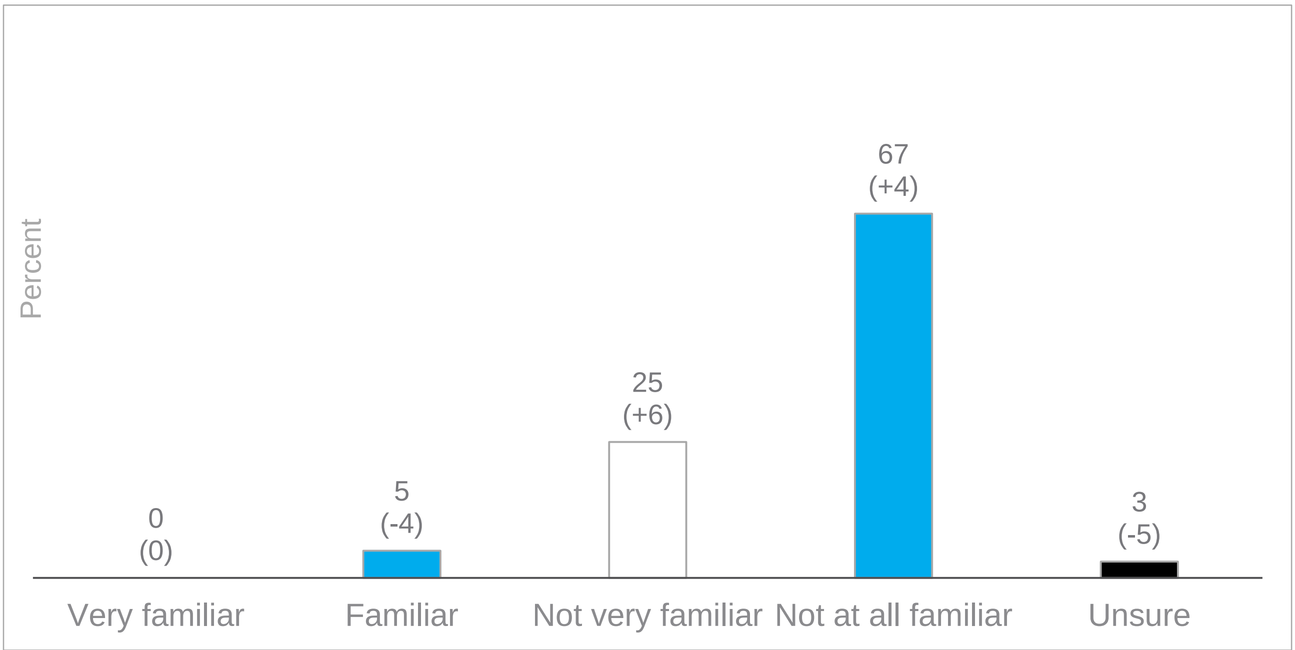
Other

Awareness of ECA

ACT household consumers in this survey are less likely than those in the last survey to claim to be familiar with Energy Consumers Australia, and there are signs that this awareness has fallen.

- 5% claim to be very familiar or familiar with Energy Consumers Australia, down 4% on the March / April survey.
- ACT is now equal with Tasmania as the state or territory where the lowest proportion of household consumers claim to be aware of ECA.

"How familiar are you with an organisation called Energy Consumers Australia?"



Western Australia

Satisfaction

Overall satisfaction

Western Australian household consumers in this survey are less likely than those in the last survey to say they are satisfied with electricity and gas services.

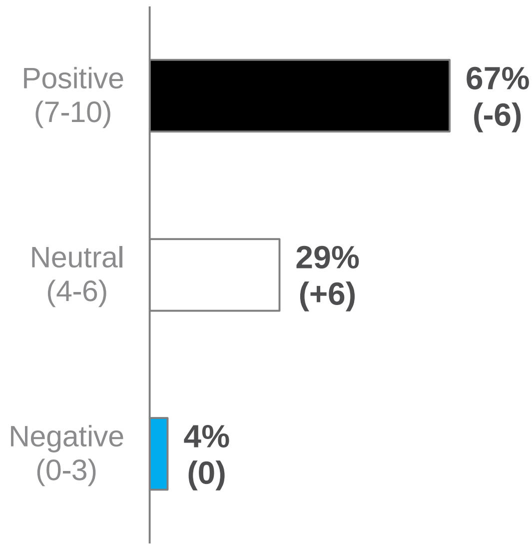
- 67% rate their satisfaction as 7 or higher out of 10, down 6% on the last survey.
- The shift seems mostly to neutral rather than negative positions, with 29% now giving neutral ratings (up 6%).

There is little change, however, in levels of satisfaction with competition in Western Australia.

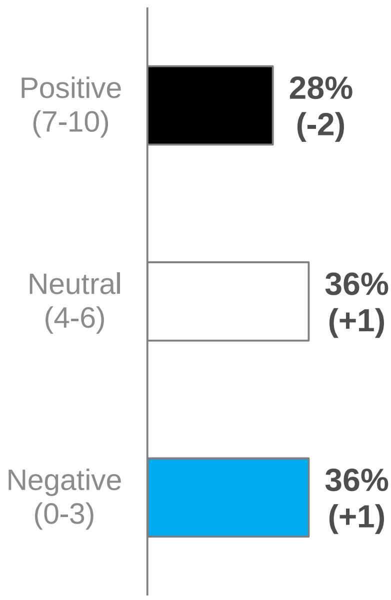
- 28% of Western Australian household consumers now say that they feel satisfied with the level of competition, down 2% on the March / April survey.

Overall satisfaction

"How satisfied are you with the provision of your electricity and gas services overall in the last 6 months?"



Satisfaction with competition



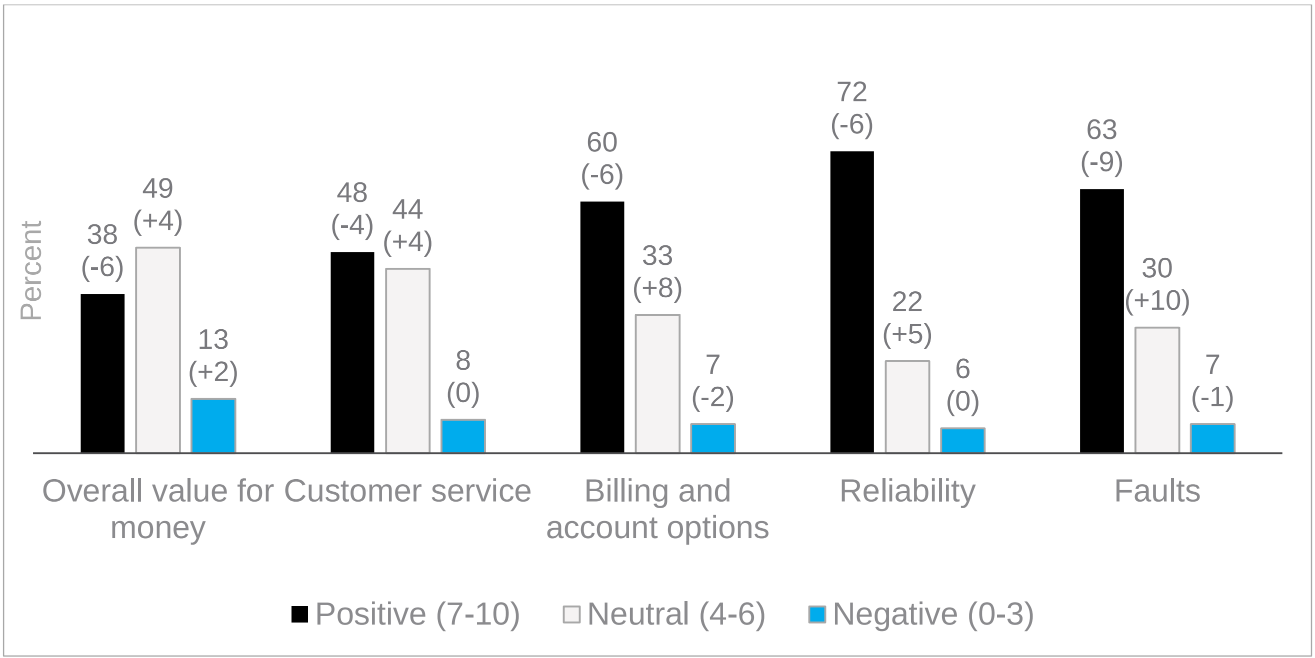
Satisfaction

Satisfaction with electricity

Western Australian household consumers in this survey gave lower ratings than those in the previous survey for all five of these measures.

- 63% say that they are satisfied with the way faults have been handled, down 9% on the last survey.
- There are 6% falls in the proportions satisfied with the value for money (38%), billing (60%) and reliability (72%) of electricity.

"How would you rate the [attribute]"
0-10 scale, 0='very poor', 10='excellent'



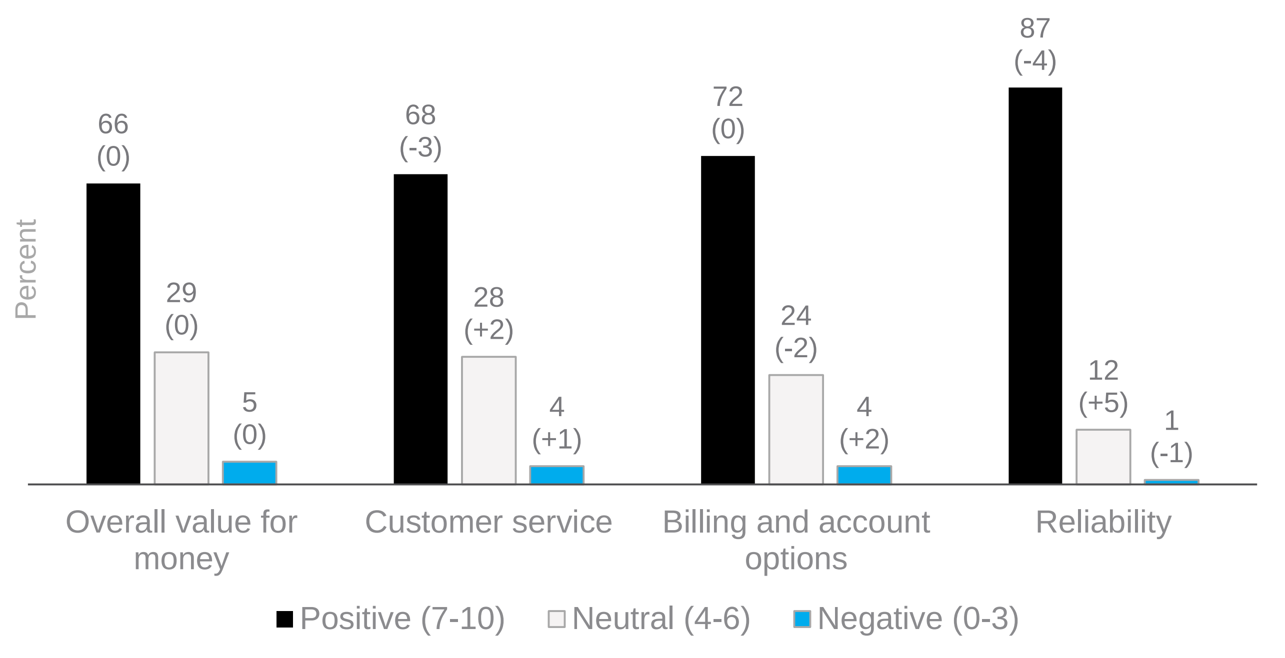
Satisfaction

Satisfaction with gas

Given the sample sizes involved, there is little movement in ratings for gas from Western Australian household consumers.

- The largest change is for reliability, where the proportion giving positive ratings is down 4% to 87%.

"How would you rate the [attribute]"
0-10 scale, 0='very poor', 10='excellent'



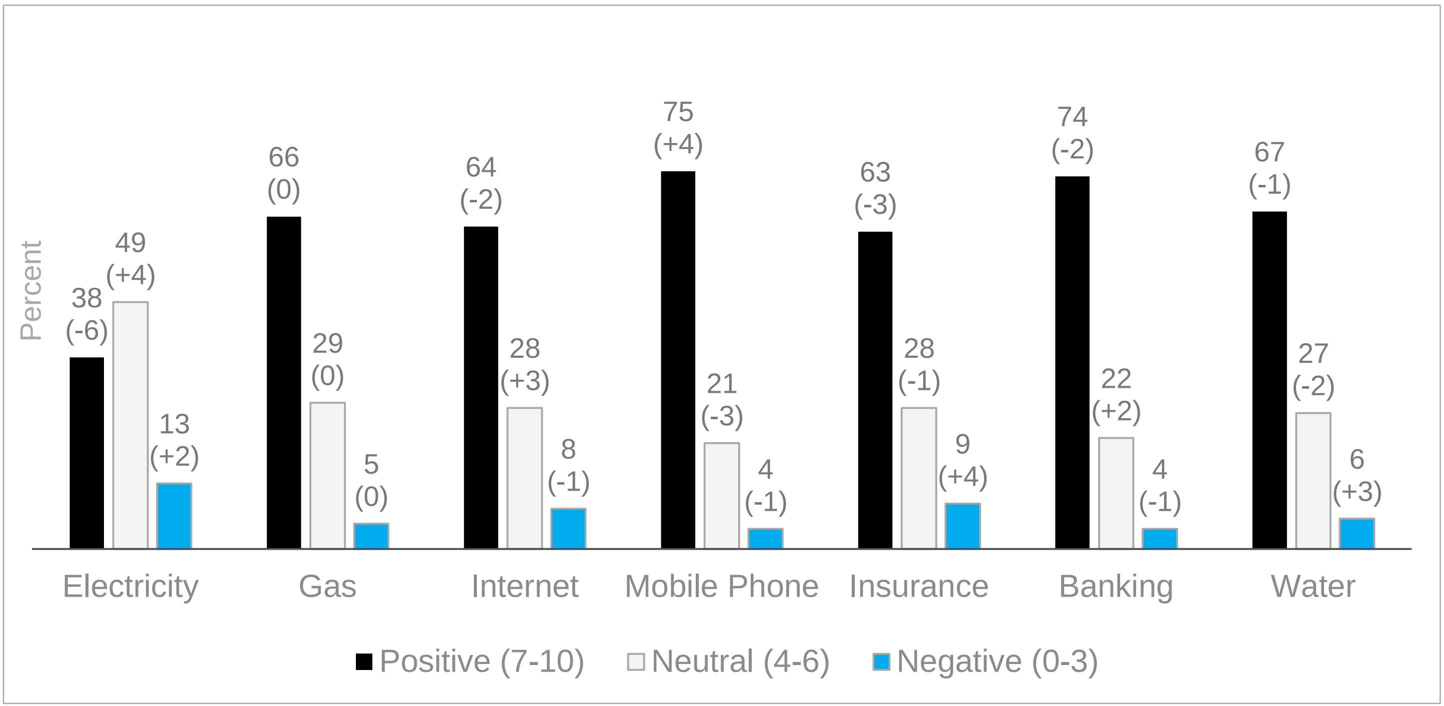
Satisfaction

Satisfaction with utilities

The largest change here is for mobile phone services.

- 75% of Western Australian household consumers now say they are satisfied with the value for money of mobile phone services, up 4% since the March / April survey.

"How would you rate the [attribute]"
0-10 scale, 0='very poor', 10='excellent'



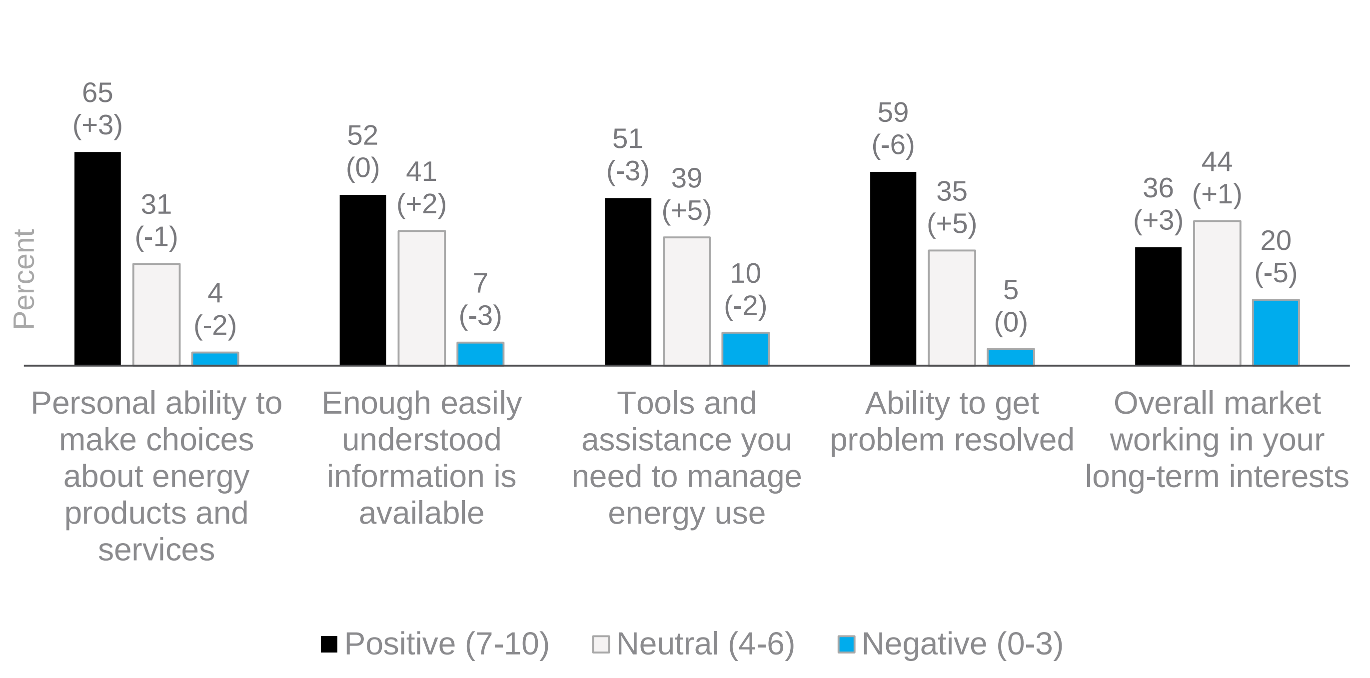
Confidence

Confidence in information and tools

Western Australian household consumers in this survey are somewhat less confident than those in the previous survey in their ability to get problems solved if they arise.

- 59% now say they are confident in this, down 6% on the last survey.
- All other changes are within the margin of error.

"How would you rate the following:"
0-10 scale, 0='very poor', 10='excellent'



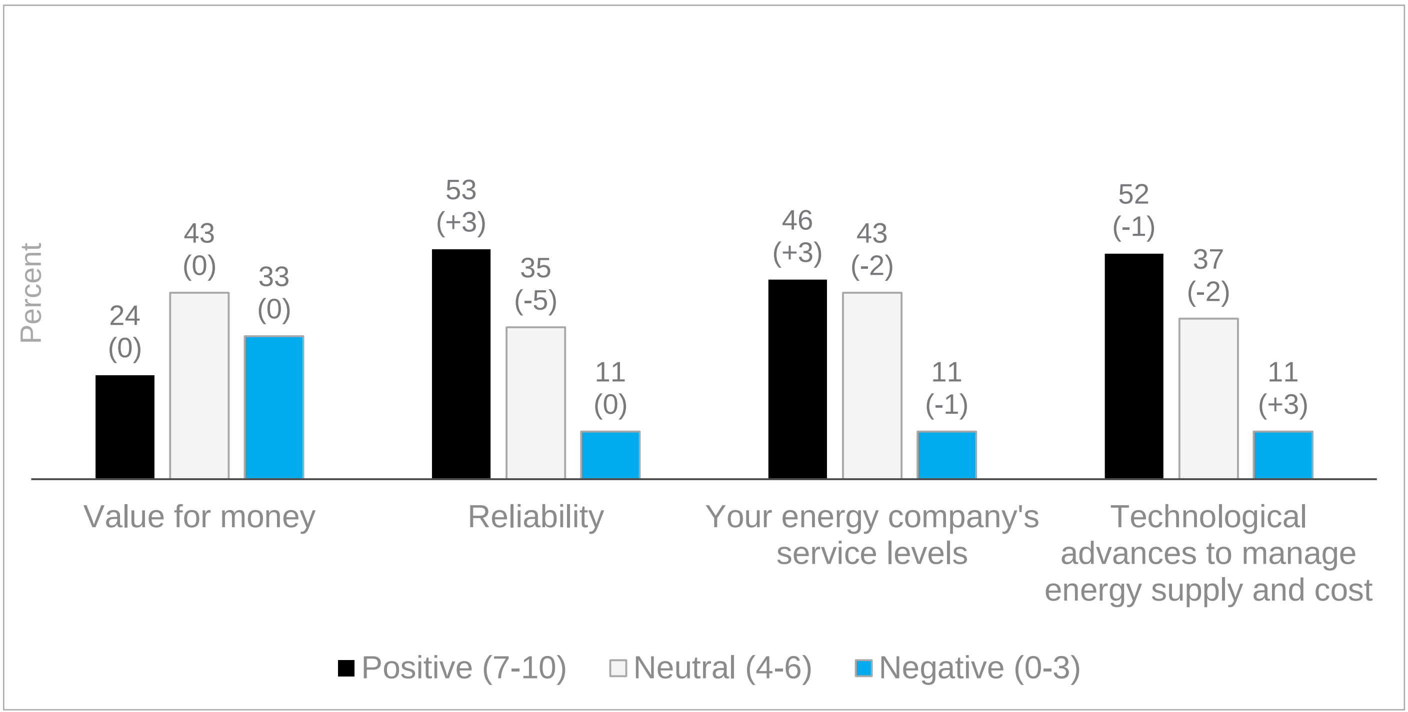
Confidence

Confidence in long term outcomes

The movements below are within the margin of error for WA household consumers.

"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…?"

0-10 scale, 0='not at all confident', 10='very confident'



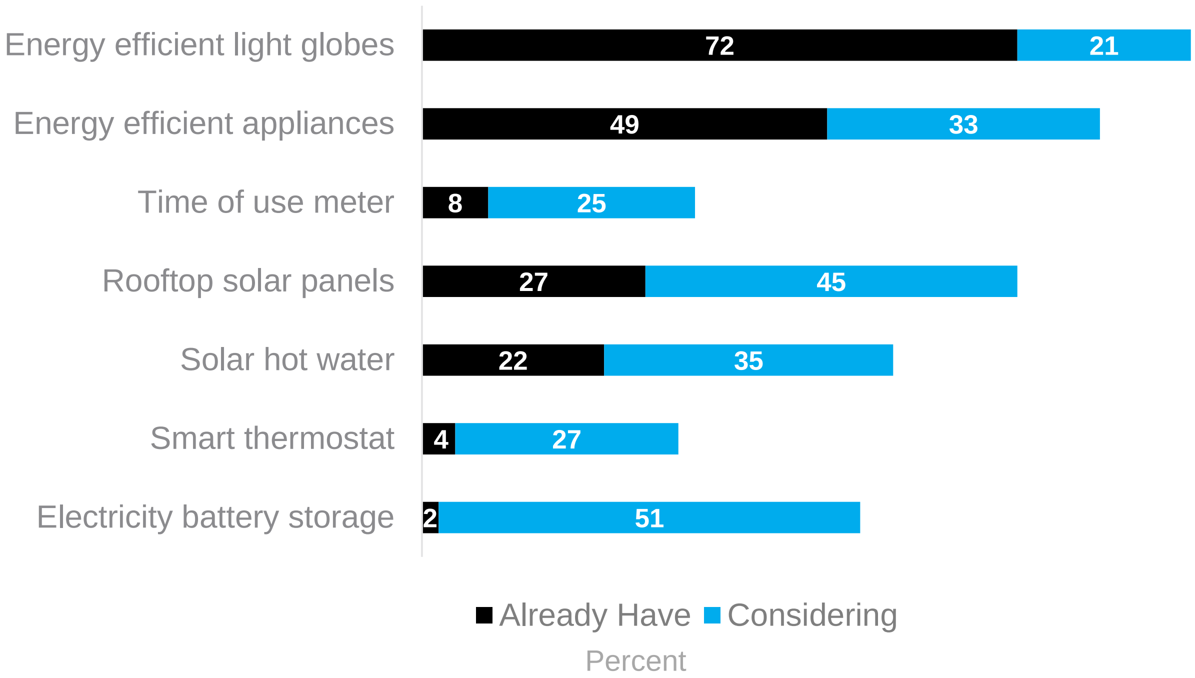
Activity

Uptake of technologies

The proportions of Western Australian household consumers claiming to be considering specific new technologies are in some cases substantially higher than in the last survey.

- 45% now say they are considering rooftop solar, up 12% on the last survey.
- 27% claim to be considering smart thermostats (up 9%).

"Are you considering purchasing or using any of the following technologies to manage the cost of electricity in your household?"



Activity

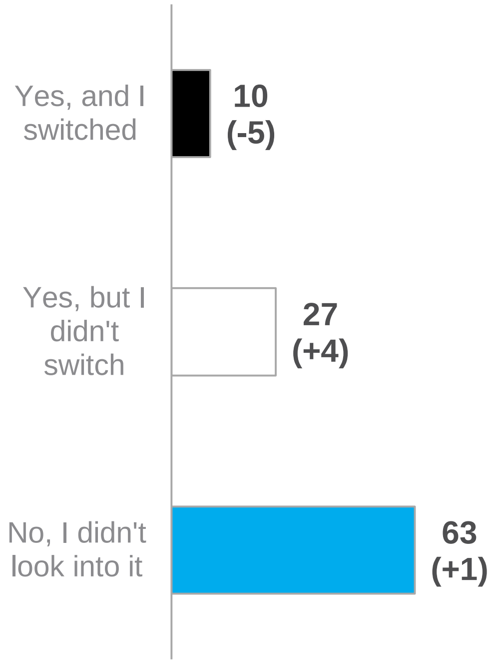
Switching behaviour

The proportion of Western Australian household consumers saying they have at least considered switching in the last three years is about the same as in the March / April survey.

- There is a 5% decrease in the proportion saying that they have switched, but this is balanced out by a 4% increase in the proportion saying that they have considered switching but not done so.

Previous behaviour

"Have you looked into or researched your options for switching energy companies or energy plans in the last 3 years?"



Activity

Reasons for switching

Although dissatisfaction with value for money continues to be the main reason for considering switching, dissatisfaction with the resolution of faults came through more strongly than in the previous survey.

- 20% of those who have considered switching nominated this as the reason, 12% higher than in the last survey.
- This seems in line with the substantial decrease in the proportion of Western Australian household consumers saying that they are satisfied with the way faults have been handled.

Which of the following best describes your reasons for considering switching?

Base: WA household consumers who considered switching in the last 3 years (n=77).

INDICATIVE ONLY: SMALL SAMPLE SIZE

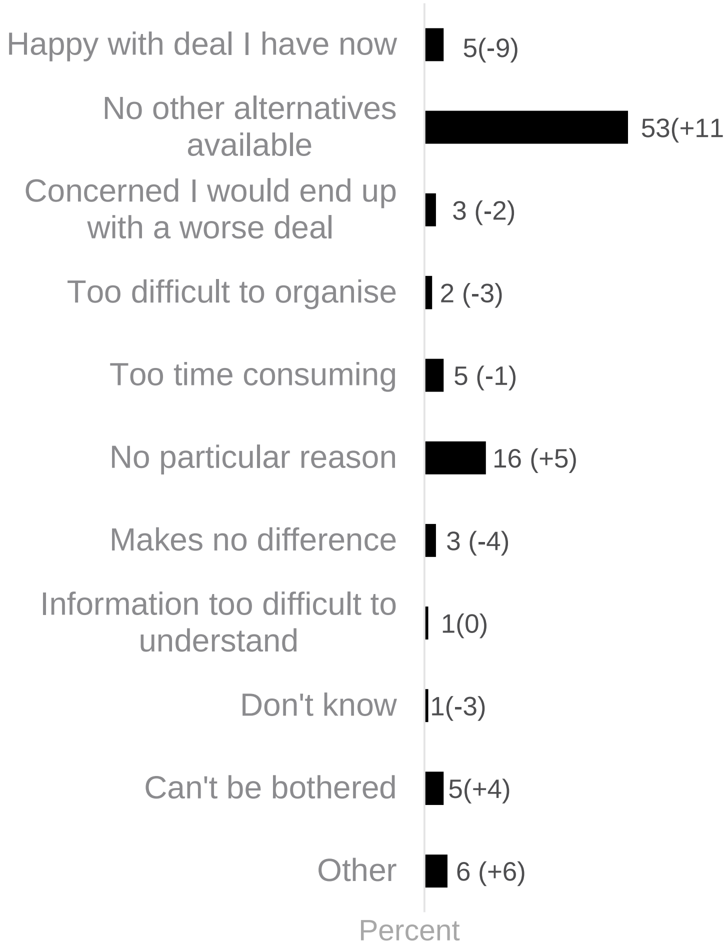
Activity

Reasons for not switching

Most of those who have not considered switching say that this is simply because there are no alternatives available.

- 56% say that they had not looked at switching because there were no other alternatives available or that it made no difference (up 7%).
- 8% say that the barriers are too high (too difficult, too time consuming or too difficult to understand), down 4%.

Which of the following best describes your reasons for not considering switching?



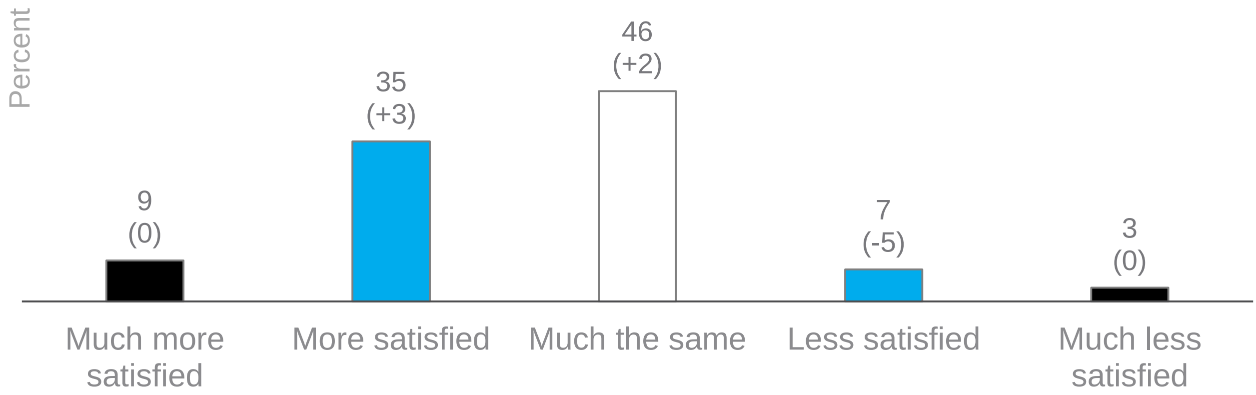
Base: WA household consumers who had not considered switching in the last 3 years (n=131)

Activity

Satisfaction after considering switching

The movements below are within the margin of error for ACT household consumers.

After looking at options for switching energy companies or plans, would you say you are more satisfied, less satisfied or much the same with the value for money you are receiving, compared with before you looked at your options?



Base: WA household consumers who considered switching in the last 3 years (n=77)

INDICATIVE ONLY: SMALL SAMPLE SIZE

Activity

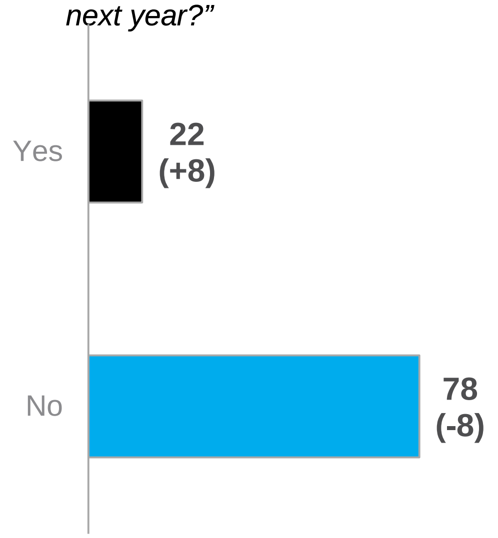
Switching intentions

In line with the relatively large decrease in satisfaction with electricity and gas services, Western Australian household consumers in this survey were more likely than those in the last survey to say they intend to switch in the year ahead.

- 22% believe that they will do so, up 8% on the March / April survey.

Future Intentions

"Do you intend to switch energy companies or energy plans in the next year?"



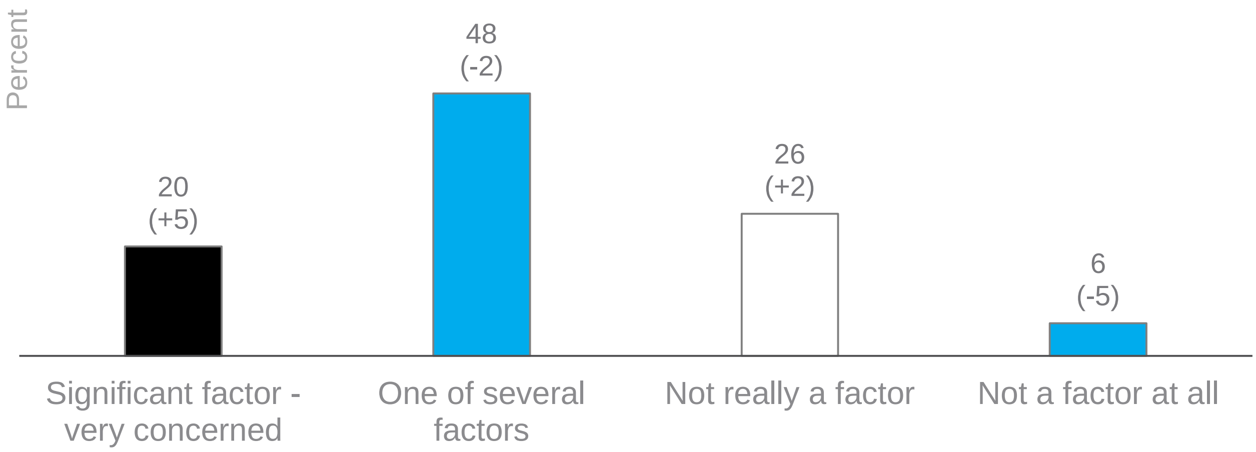
Activity

Consideration of the environment

Western Australian household consumers in this survey were a little more likely than those in the last survey to say that they considered the environment in decisions about energy products and services.

- 20% say that it is one of the most important factors, up 5% on the March / April survey.
- 6% state that it is not a factor at all, down 5%.

"How much does your own personal concern about the environment impact on your decisions about energy products and services?"



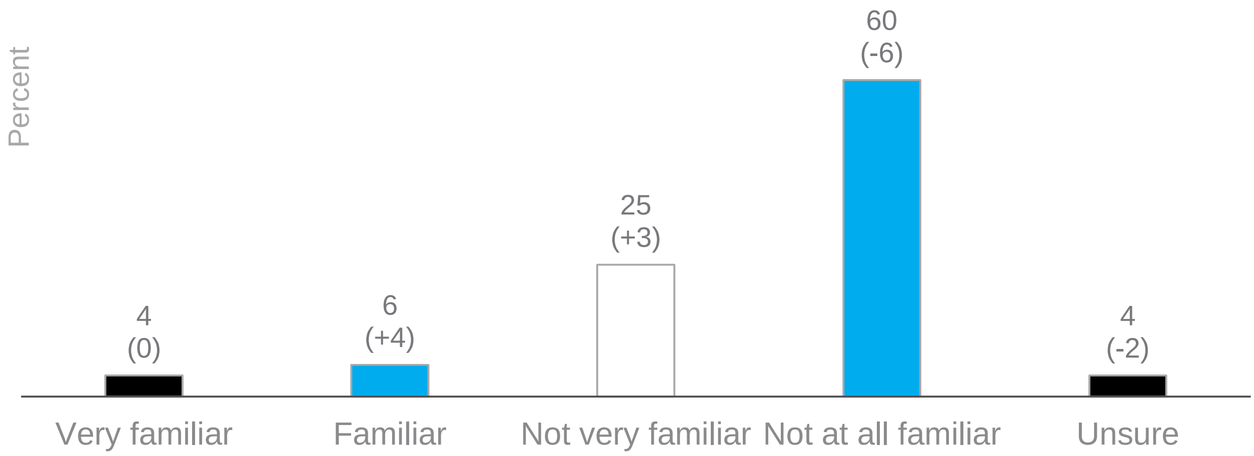
Other

Awareness of ECA

Western Australian household consumers in this survey are a little more likely than those in the previous survey to say that they have some familiarity with Energy Consumers Australia, although this knowledge often remains vague.

- The proportion claiming to be very familiar with ECA is unchanged on 4%, but there is a 4% increase in the proportion saying that they are 'familiar' with the organisation (now 6%).
- There is also a 3% increase in the proportion saying that they are 'not very familiar' (now 25%), which at least suggests that they have heard of ECA, even if only vaguely.

"How familiar are you with an organisation called Energy Consumers Australia?"



CONFIDENTIAL

Energy Consumers Australia

Energy Consumer Sentiment Survey
September 2016

QUESTIONNAIRE

Appendix A: Survey

1. [HOUSEHOLD ONLY] Which of the following best describes you:
    a. I am the main decision maker in my household in relation to choosing energy products and services
    b. I am a joint decision maker in my household in relation to choosing energy products and services
    c. I have no role in decision making in my household in relation to choosing energy products and services [EXCLUDE]

2. [BUSINESS ONLY] Which of the following best describes you:
    a. I am the main decision maker in my business in relation to choosing energy products and services
    b. I am a joint decision maker in my business in relation to choosing energy products and services
    c. I have no role in decision making in my business in relation to choosing energy products and services [EXCLUDE]

3. Are you: (SR)
    a. Male
    b. Female

4. [HOUSEHOLD ONLY] How old are you: (SR)
    a. Under 18 [EXCLUDE]
    b. 18-24
    c. 25-34
    d. 35-44
    e. 45-54
    f. 55-64
    g. 65-74
    h. 75+

5. Where do you live? (SR)
    a. Sydney
    b. Other New South Wales
    c. Melbourne
    d. Other Victoria
    e. Brisbane
    f. Other Queensland
    g. Perth
    h. Other Western Australia
    i. Adelaide
    j. Other South Australia
    k. Hobart
    l. Other Tasmania
    m. Darwin
    n. Other Northern Territory
    o. ACT

6. [BUSINESS ONLY] How many people are employed in your business? (SR)
    a. Less than 20
    b. 20-99
    c. 100-199
    d. 200+ [EXCLUDE]

SECTION 2: ELECTRICITY PRICE

[DISPLAY TEXT TO BUSINESS ONLY] For the following questions please respond in relation to your business electricity and gas accounts

7. How would you rate the **overall value for money** of the products and services provided by your electricity company in the past 6 months? Please use a scale where 0 means very poor and 10 is excellent. (SR)
   SCALE: 0 – 10

8. How satisfied are you with the overall **quality of customer service** provided by your electricity company in the past 6 months? Please use a scale where 0 means very dissatisfied and 10 is very satisfied. (SR)
   SCALE: 0 – 10

9. Thinking about your electricity supplier, how satisfied are you with **the billing and account options** (such as the option of monthly billing, online accounts etc) currently available to you? Please use a scale where 0 means very dissatisfied and 10 is very satisfied. (SR)
   SCALE: 0 - 10

10. Thinking about the reliability of your electricity supply, how satisfied are you with **the number of times you've had loss of power, blackout or other faults** with your electricity supply in the past 6 months. Please use a scale where 0 means 'there have been far too many power outages, blackouts and faults with my electricity supply' and 10 is 'there have been no power outages, blackouts or faults with my electricity supply.' (SR)
    SCALE: 0 – 10

11. Thinking about the reliability of your electricity supply, how satisfied are you with **the number of times you've had loss of power, blackout or other faults** with your electricity supply in the past 6 months. Please use a scale where 0 means 'there have been far too many power outages, blackouts and faults with my electricity supply' and 10 is 'there have been no power outages, blackouts or faults with my electricity supply.' (SR)
    SCALE: 0 – 10

12. [ASK ONLY IF Q 11 does not = 10] If you have had power outages, blackouts or faults in the past 6 months, how satisfied are you with **the time it took to resolve the issue**? Please use a scale where 0 means very dissatisfied and 10 is very satisfied (SR)
    SCALE: 0 – 10

13. How likely is it that **you would recommend your current electricity retailer to a friend or colleague**? Please use a scale of 0-10 where 0 means very unlikely and 10 means very likely. (SR)
    SCALE: 0 – 10

SECTION 3: GAS

[DISPLAY TEXT TO BUSINESS ONLY] For the following questions please respond in relation to your business electricity and gas accounts

14. Do you have mains gas or bottle gas? (SR)
    a. Mains
    b. Bottle
    c. Neither [SKIP TO Q23]
    d. Don't know

15. Is your gas account with the same company as your electricity account? (SR)
    a. Yes, my gas and electricity accounts are with the same company [SKIP TO Q20]
    b. No, I have a different company for my gas account
    c. Don't know

16. How would you rate the **overall value for money of the products and services provided by your gas company** in the past 6 months? Please use a scale where 0 means very poor and 10 is excellent? (SR)
SCALE: 0 – 10

17. How satisfied are you with the **overall quality of customer service provided by your gas company** in the past 6 months? Please use a scale where 0 means very unsatisfied and 10 is very satisfied? (SR)
SCALE: 0 – 10

18. Thinking about your gas supplier, how satisfied are you with **the billing and account options** (such as the option of monthly billing, online accounts etc.) currently available to you? Please use a scale where 0 means very dissatisfied and 10 is very satisfied? (SR)
SCALE: 0 – 10

19. Thinking about the reliability of your gas supply, how satisfied are you **with the number of times you've had interruptions or faults with your gas supply in the past 6 months.** Please use a scale where 0 means 'there have been far too many interruptions and faults with my gas supply' and 10 is 'there have been no interruptions or faults with my gas supply'? (SR)
SCALE: 0 – 10

20. [ASK ONLY IF Q20 does not = 10] Thinking about the reliability of your gas supply, how satisfied are you **with the number of times you've had interruptions or faults with your gas supply in the past 6 months.** Please use a scale where 0 means 'there have been far too many interruptions and faults with my gas supply' and 10 is 'there have been no interruptions or faults with my gas supply'? (SR)
SCALE: 0 – 10

21. How likely is it that you would **recommend your current gas retailer** to a friend or colleague? Please use a scale of 0-10 where 0 means very unlikely and 10 means very likely? (SR)
SCALE: 0 – 10

SECTION 4: ADDITIONAL

22. How satisfied are you with the provision of **your electricity and gas services overall** over the last 6 months? Please use a scale where 0 means not at all satisfied and 10 is very satisfied? (SR)
SCALE: 0 – 10

23. How satisfied are you with **the level of competition in the energy market** in your area? By level of competition we mean the range of choices or number of potential suppliers. Please use a scale of 0-10 where 0 means very satisfied and 10 means very dissatisfied. (SR)
SCALE: 0 – 10

I now would like to ask you a question about some services not related to your energy and gas.
How would you rate the overall value for money of the products and services provided by your service provider in the following areas, in the past 6 months? Please use a scale where 0 means very poor and 10 is excellent. (SR per ROW)
SCALE: 0 – 10

24. Your internet service
25. Your mobile phone service
26. Your insurance services
27. Your banking services
28. Your water services

29. [BUSINESS ONLY] Does your business operate primarily from: (SR)
    a. Your home
    b. Another fixed location
    c. Mobile locations (e.g. tradespeople working at other people's homes

Essential. RESEARCH

[HOUSEHOLD TEXT ONLY]
Now, thinking back to you energy supply, Do you already have, or are you considering purchasing or using any of the following technologies to manage the cost of electricity in your household? (SR per ROW)

[FIXED BUSINESS TEXT ONLY]
Now, thinking back to your energy supply, Do you already have, or are you considering purchasing or using any of the following technologies to manage the cost of electricity in your business? (SR per ROW)

	Already have/use this	Yes, I am planning to adopt this option in next 12 months	Yes, I am considering adopting this option in next 5 years	Yes I am considering, but not an option in the next 5 years	No, not considering at all	I'm not sure what this is
30. Rooftop solar panels						
31. Electricity battery storage						
32. Solar hot water						
33. Energy efficient light globes						
34. Energy efficient (home) appliances						
35. Time of use meter, also known as a smart or interval meter						
36. A smart thermostat						
37. Another technology not already mentioned to manage your electricity use and costs						

38. Have you looked into or researched your options for switching energy companies or energy plans in the last 3 years (even if you didn't end up switching)? (SR)
    a. Yes, and I switched
    b. Yes, but I didn't switch
    c. No, I didn't look into it

39. Have you ever switched energy companies or energy plans? (SR)
    a. No
    b. Yes

40. Do you intend to switch energy companies or energy plans in the next year? (SR)
    c. No
    d. Yes – I intend to do so in the next year

41. [ASK IF Q38 = a. or b.] If you have looked at your options for switching energy companies or plans in the last 3 years, whether or not you actually switched companies or stayed with your energy provider, would you say you are more satisfied, less satisfied or much the same with the value for money you are receiving, compared with before your looked into your options? (SR)
    a. Much more satisfied
    b. More satisfied
    c. Much the same
    d. Less satisfied
    e. Much less satisfied

42. [ASK IF Q38 = a. or b.] If you have switched energy companies or energy plans in the last 3 years, or looked into doing so, which of the following best explains the reason for that? (SR)
    a. I am/was dissatisfied with the value for money I was receiving
    b. I am/was dissatisfied with the customer service I was receiving (such as billing issues or communication issues)
    c. I am/was dissatisfied with the number of faults, interruptions and outages of the energy supply I was experiencing and/or how quickly these problems were resolved
    d. I am/was not dissatisfied, but found a better value deal elsewhere
    e. I am/was not dissatisfied and there was another reason for changing

43. [ASK IF Q38 = c.] If you have not switched or looked into switching energy companies or energy plans in the last three years, which of the following best describes your reason not to?? (SR)
    a. Too time consuming to research
    b. Too difficult to organise (disconnection and reconnection)
    c. The information available is too complex and difficult to understand
    d. I'm happy with the deal I have now
    e. I was concerned I would end up with a worse deal
    f. (Business Customer Only) Decisions regarding which supplier to use are decided by company policy
    g. No particular reason
    h. Couldn't be bothered/too lazy
    i. They're all the same/makes no difference
    j. No other alternatives available as far as I know
    k. Other (please specify)
    l. Don't know

44. How much does your own personal concern about the environment impact on your decision about energy products and services? (SR)
    a. It is a significant factor – I am very concerned about the environment and it is the main consideration for me in choosing energy products and services
    b. It is a factor– I am concerned about the environment and it is one consideration in choosing energy products and services
    c. It is not really a factor – I am concerned about the environment but other considerations are more important to me when choosing energy products and services
    d. Not at all a factor – The environment is not a consideration for me in choosing energy products and services.

SECTION 5: CONFIDENCE

45. How **confident do you feel in your ability to make choices about energy products and services**, such as which plan or supplier to choose? Please use a scale where 0 means not at all confident and 10 is very confident? (SR)
    SCALE: 0 – 10

46. How confident do you feel 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? Please use a scale where 0 means not at all confident and 10 is very confident? (SR)
    SCALE: 0 – 10

47. How confident do you feel 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. Please use a scale where 0 means not at all confident and 10 is very confident? (SR)
    SCALE: 0 – 10

48. How confident are you in your ability to **get a problem with your energy services resolved through your energy company or a third party**? Please use a scale where 0 means not at all confident and 10 is very confident? (SR)
    SCALE: 0 – 10

49. 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. Please use a scale where 0 means not at all confident and 10 is very confident? (SR)
SCALE: 0 – 10

Thinking about the overall market outcomes how confident are you that **the market will provide better outcomes for you in 5 years**, in terms of: (SR per ROW)
SCALE: 0 – 10

50. Value for money
51. Reliability (blackouts and restoration of supply) of power supply
52. Your energy companies customer service levels
53. Technological advances to manage your energy supply and costs

54. If you had a complaint about your electricity or gas services which you could not resolve by talking to your retailer or network company, which people or organisation[s] would you contact? (OE)

55. How familiar are you with an organisation called the Energy Ombudsman, which assists consumers with complaints about energy? (SR)
    a. Very familiar
    b. Familiar
    c. Not very familiar
    d. Not at all familiar
    e. Don't know

SECTION 6: FINAL DEMOGRAPHICS

56. [HOUSEHOLD ONLY] What is your household income? (SR)
    a. Less than $20,000
    b. $20,000 to under $40,000
    c. $40,000 to under $60,000
    d. $60,000 to under $80,000
    e. $80,000 to under $100,000
    f. $100,000 to under $120,000
    g. $120,000 to under $150,000
    h. $150,000 or more
    i. Don't know
    j. Prefer not to say

57. [HOUSEHOLD ONLY] What is the highest level of education you have completed? (SR)
    a. Did not complete Year 12
    b. Completed Year 12
    c. Trade/TAFE
    d. Diploma
    e. University Degree

58. [HOUSEHOLD ONLY] Do you have dependent children under the age of 18? (SR)
    a. Yes
    b. No

59. [HOUSEHOLD ONLY] What is the composition of your current household? (SR)
    a. Person living alone
    b. Single person with children
    c. Couple only
    d. Couple with children
    e. Group / share household
    f. Other (please specify)

60. [HOUSEHOLD ONLY] Do you rent? (SR)
    a. Live in your own home
    b. Rent
    c. Live with family or friends at no cost
    d. Other

61. [HOUSEHOLD ONLY] Does your household receive a government rebate or concession on your energy bills?(SR)
    a. Yes
    b. No
    c. Don't know
    d. I'd rather not say

62. [HOUSEHOLD ONLY] Which of the following best describes how you feel about your current financial situation? (SR)
    a. I am financially comfortable
    b. I can manage household bills but struggle to afford anything extra
    c. I feel under financial pressure.

63. [HOUSEHOLD ONLY] Do you have any special payment arrangements with you electricity retailer as a result of financial hardship or are you having difficulty paying your energy bills? (SR)
    a. Yes
    b. No
    c. Don't know
    d. I'd rather not say

64. [HOUSEHOLD ONLY] Do you speak a language other than English at home? (SR)
    a. No, English only
    b. Yes, Mandarin
    c. Yes, Italian
    d. Yes, Arabic
    e. Yes, Cantonese
    f. Yes, Greek
    g. Yes, Vietnamese
    h. Yes, other (please specify) [OE BOX]
    i. I'd rather not say

65. [BUSINESS ONLY] Which of the following categories does your business fall into? (SR)
    a. Construction
    b. Professional, Scientific
    c. IT and Technical Services
    d. Rental, Hiring and Real Estate Services
    e. Agriculture, Forestry and Fishing
    f. Financial and insurance services
    g. Retail trade
    h. Transport, postal and warehousing
    i. Health care and social support
    j. Manufacturing
    k. Accommodation and food/beverage services
    l. Wholesale trade
    m. Other

66. [BUSINESS ONLY] Do you own or lease the primary premises from where your business operates? (SR)
    a. Lease
    b. Own
    c. Other

67. [BUSINESS ONLY] Which of the following best describes your general hours of operation? (SR)
    a. 9am to 5pm
    b. 5pm – 12pm
    c. 24 hours
    d. Other

68. [BUSINESS ONLY] Do you have solar panels on your business premises? (SR)
    [HOUSEHOLD ONLY] Do you have solar panels on your house?
    a. Yes
    b. No
    c. Not sure

69. How familiar are you with an organisation called Energy Consumers Australia? (SR)
    a. Very familiar
    b. Familiar
    c. Not very familiar
    d. Not at all familiar
    e. Don't know

70. Do you have any final comments you would like to make about the matters discussed in this survey? (OE)