Essential. RESEARCH

Energy Consumers Australia

Energy Consumer Sentiment Survey June 2017

Table of contents

Notes on methodology

This online survey was in the field from 30 March to 6 April 2017.

The survey fieldwork was conducted by Online Research Unit using participants from their online research only panel.

All other tasks were completed by Essential Research.

The target population for this research was 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.

The Wave 3 report also shows results for the deregulated area of South East Queensland.

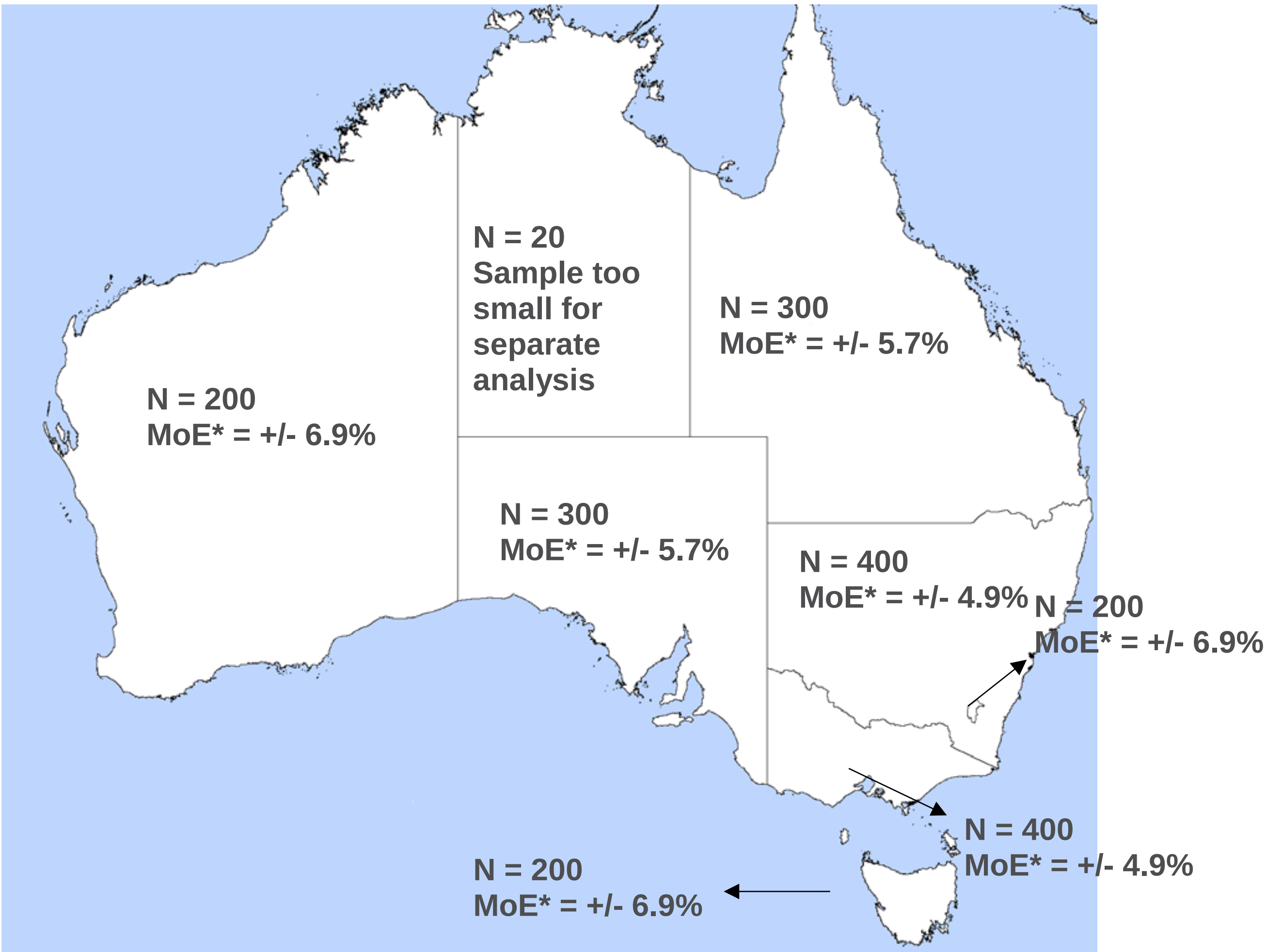
- The Wave 3 study included a question on postcode to make this possible.

- N=217 of the n=300 Queensland sample are from the SE Queensland deregulated area.
- Because the sample for the remainder of Queensland (n=83) is too small for robust analysis, the summary charts provide results for Queensland (the state as a whole) and SE Queensland (specifically, the deregulated part of SE Queensland). Areas which might be seen as being in SE Queensland but which are not deregulated are excluded from the specified SEQ sample.

Data labels show the current result, and then the change since the March / April 2016 survey in brackets.

“62 (-5)” therefore means that the current result is 62%, down 5% since last year’s survey.

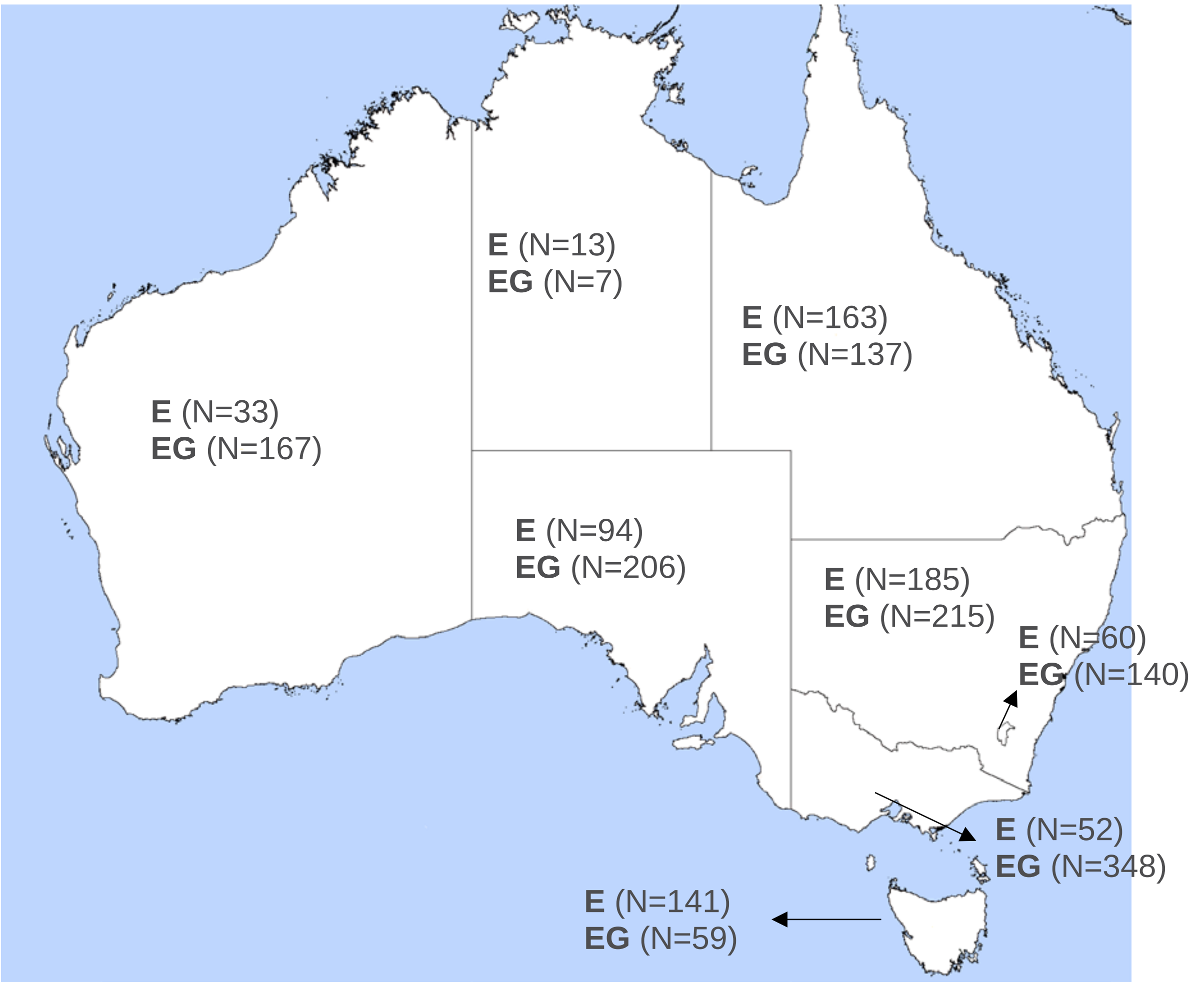
Samples by state and territory



Plus nationwide:

Businesses with less than 200 employees
N=280, MOE* = ±5.9%
(MOE = Margin of Error)
Including N=197 with 19 or fewer employees and N=83 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=98)
EG (N=182)

Summary Findings

Summary of key findings

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

- Each survey reports results at a point in time.
- There may be changes between the two waves because participants in the second third 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.
- In several cases, declines noted between Wave 1 (March / April 2016) and Wave 2 (August / September 2016) have been reversed in Wave 3 (March / April 2017). This suggests that there may be a seasonal effect, where ratings decline in winter and recover in summer. Future waves of this research will identify whether this seasonal effect continues in the future.

Comparing Wave 1 and Wave 3 shows signs of improvement over the last year amongst household consumers in most states and territories, and amongst small business consumers.

- Overall satisfaction with the provision of electricity and gas services is up 8% over the last year amongst Victorian household consumers and up 7% amongst small business consumers.
- Satisfaction with the reliability of electricity is up 10% amongst Victorian household consumers and up 9% amongst small business consumers.
- The proportion willing to recommend their electricity retailer to others is up 7% amongst Tasmanian household consumers and 11% amongst small business consumers.
- Confidence that the market will deliver better value for money in the long-term is up 10% in New South Wales (although still only 34% expect this to be the case) and up 16% amongst small business consumers.

The exception to this overall improvement is in South Australia, where ratings from household consumers are generally down.

- Recent interruptions to supply in South Australia have clearly had an impact, but may not be the only cause.
- There is a 32% drop over the last year in the proportion of South Australian household consumers satisfied with the reliability of electricity, but 8% of this fall occurred between Wave 1 and Wave 2 (i.e. before the September blackout event in South Australia).
- Overall satisfaction with electricity and gas services is down 9%, and the proportion willing to recommend their electricity retailer to others is down 6%.
- The proportion of South Australian household consumers confident that the market is working in the long-term interests of consumers is down 8% to just 27%.

The proportion of consumers reporting that they have considered switching is generally down on a year ago.

- 41% of Queensland household consumers report considering switching (down 5%) as do 31% of Western Australian household consumers (down 7%).
- There is a 7% fall in the proportion of small business consumers reporting considering switching in the last three years (now 56%).

The differences between the Southeast Queensland results and those for the state as a whole are in line with what might be expected from a deregulated area.

- The comparisons are possible in the Wave 3 survey because a question on postcode was added.
- SE Queensland household consumers are a little more satisfied with the value for the money of electricity (48% satisfied vs 44% in Queensland as a whole) and with customer service (58% vs 55%) and are clearly more satisfied with the level of competition (51% vs 43%).
- 49% of SE Queensland household consumers report looking at switching in the last three years (41% in Queensland as a whole) – it should be noted that that part of Queensland has been deregulated for less than a year (1 July 2016).
- 22% say that they intend to switch in the year ahead (18% for Queensland as a whole).

National findings

Satisfaction

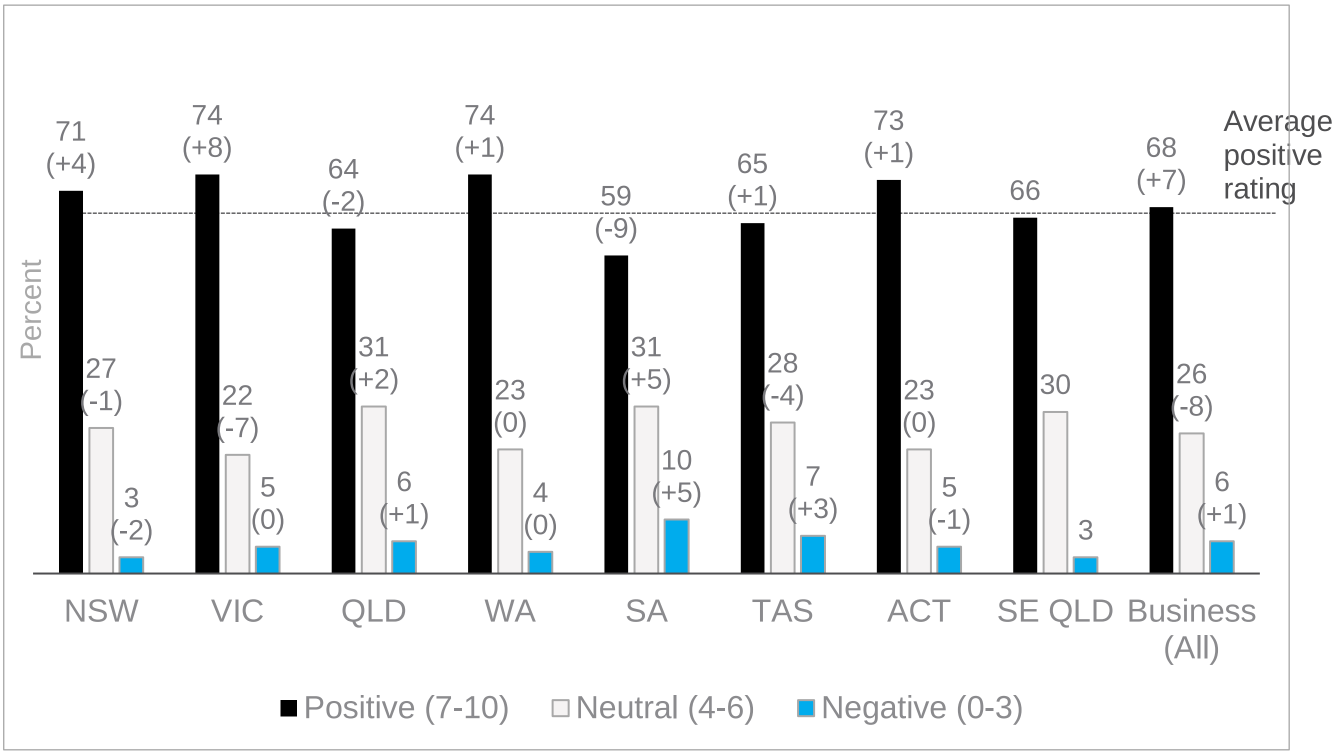
Overall satisfaction

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

- The largest fall in household consumers' overall satisfaction is in South Australia (down 9% to 59% satisfied).
- The largest increases in satisfaction are in Victoria (up 8% to 74%) and among small business consumers (up 7% to 68%).

"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'

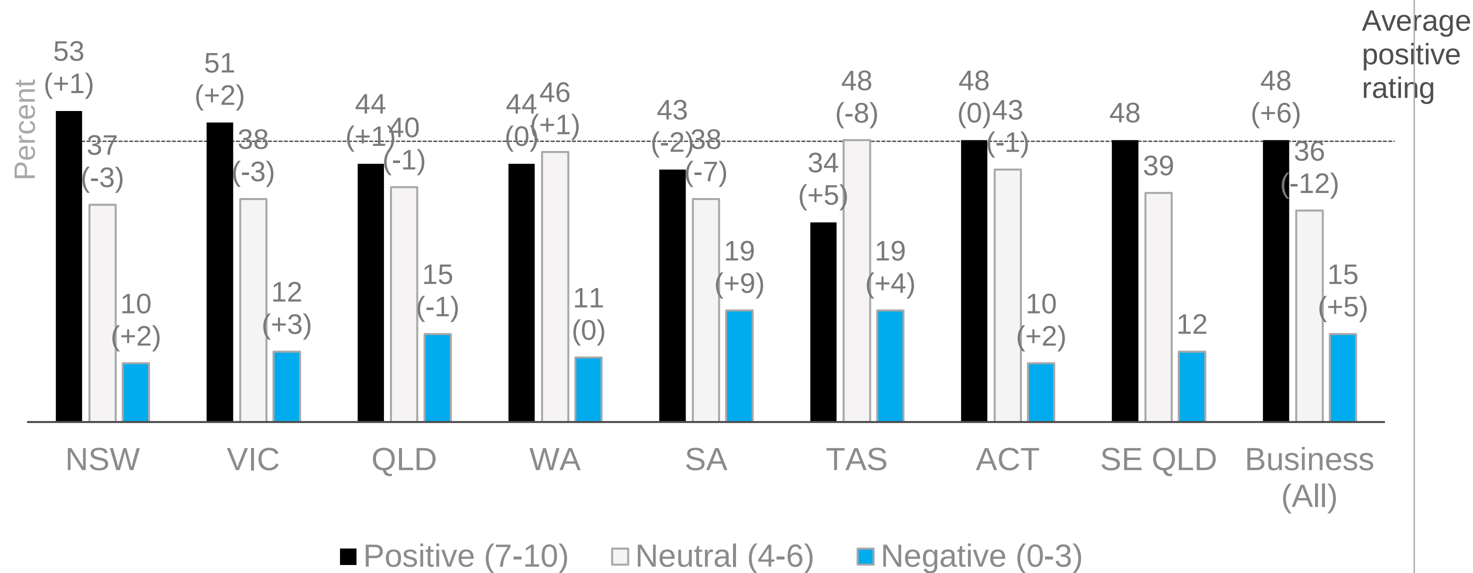


Overall value for money (Electricity)

Ratings of the value for money of electricity are steady in most states and territories.

- The only substantial shift is in Tasmania, where satisfaction in value for money increased 5% to 34%. However, Tasmania still has the lowest satisfaction with value for money.
- 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'



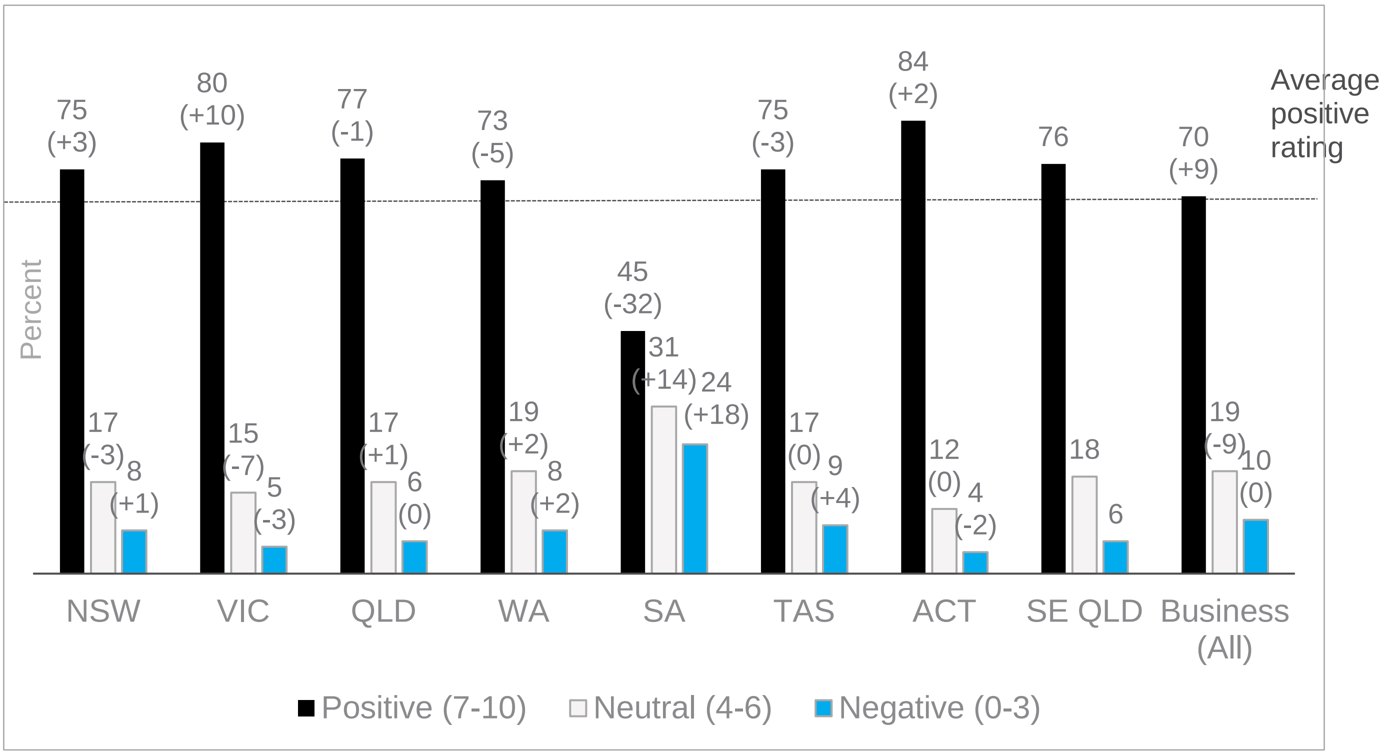
Reliability (Electricity)

Satisfaction with the reliability of electricity fell sharply in South Australia, but improved in Victoria and amongst small business consumers.

- Although much of the decrease in South Australia (down 32% to 45% satisfied) almost certainly reflects events in the state such as the September blackout, the August / September survey (conducted entirely before the blackout event) also showed an 8% decline from Wave 1 to Wave 2.
- The largest increases in satisfaction were in Victoria (up 10% to 80%) and among small business consumers (up 9% to 70%).

"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'

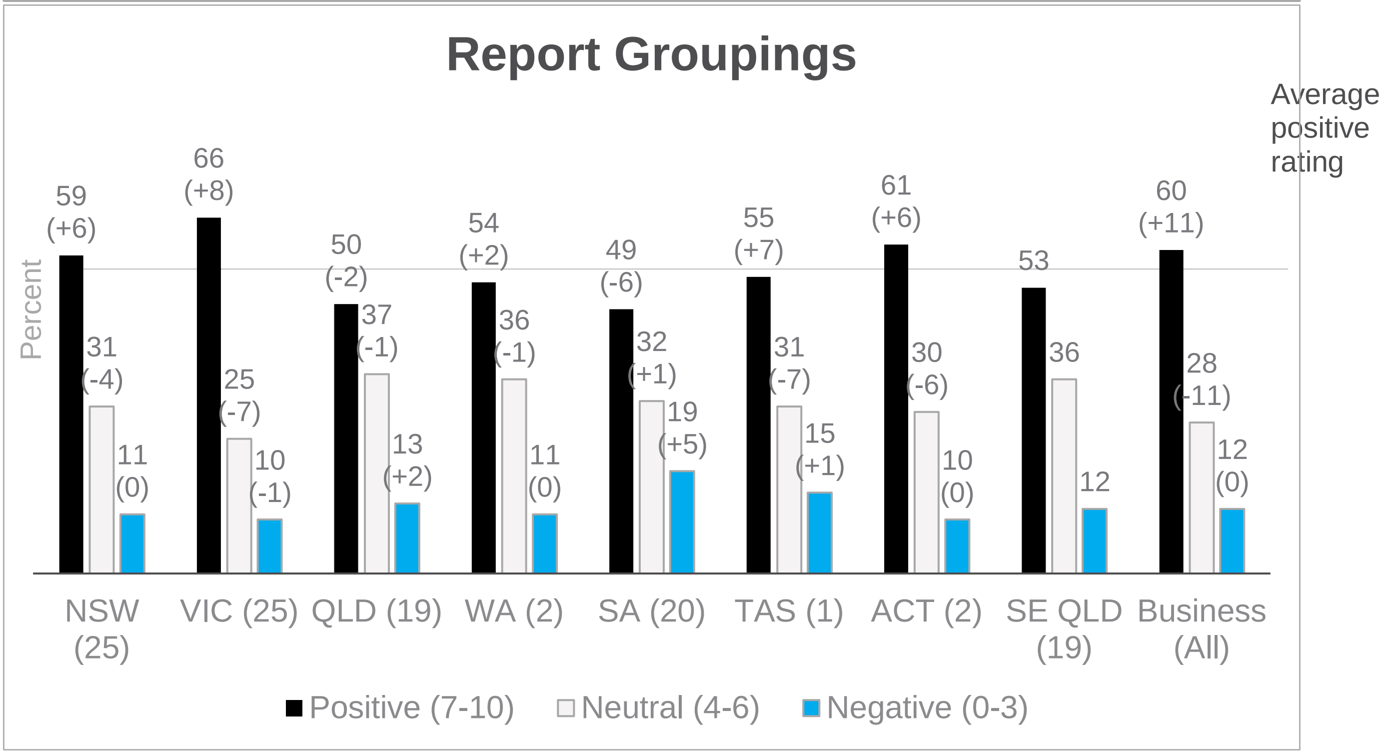


Recommending retailers to others (Electricity)

The proportion of household consumers reporting that they would recommend their electricity retailer rose in several states and territories, but fell in South Australia.

- 49% of South Australian household consumers said were likely to recommend their electricity retailer, down 6% on a year ago.
- The largest upward changes were among small business consumers (up 11% to 60%) and Victorians (up 8% to 66%).[1]

"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'



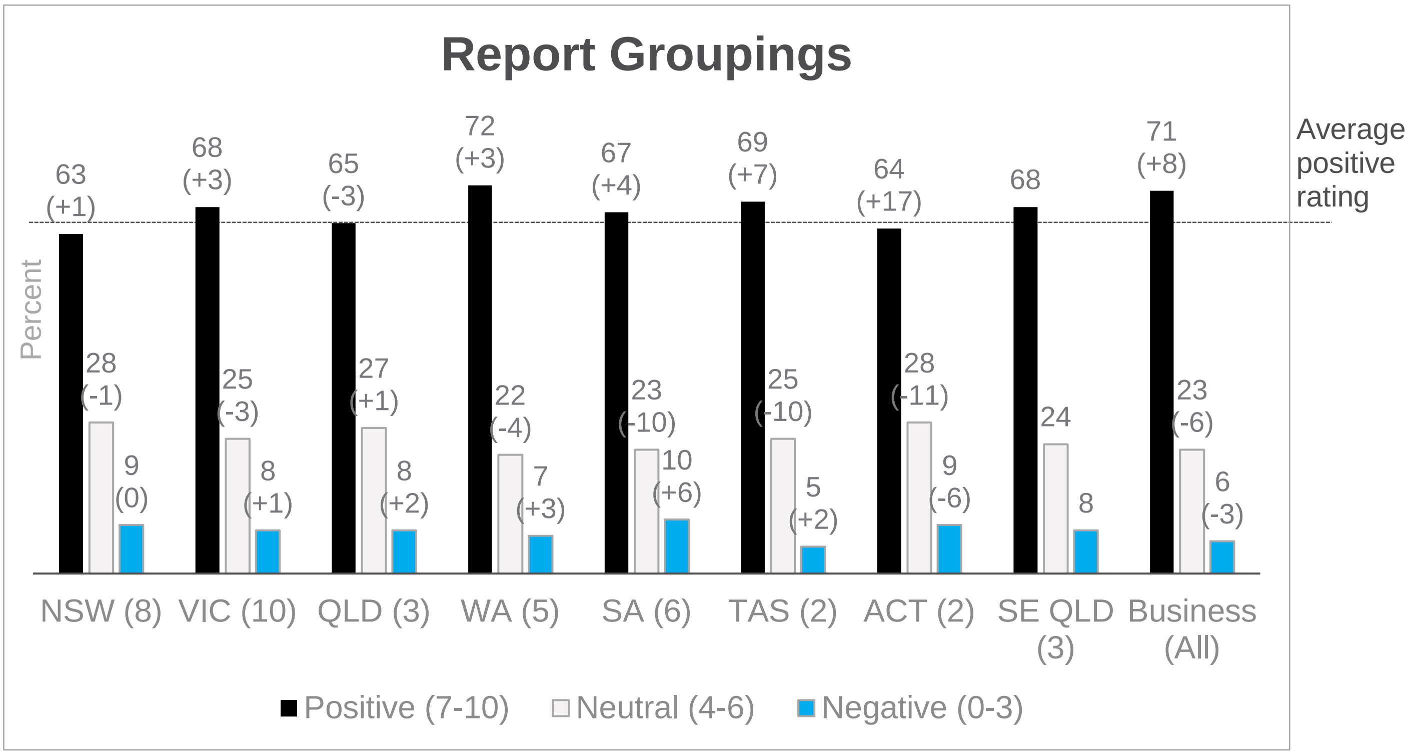
The numbers in brackets on the chart are the number of retailers operating in the specified market – e.g. there are 25 retailers in NSW.

Recommending retailers to others (Gas)

The proportion of household consumers reporting that they would recommend their gas retailer to others is generally up.

- The largest change was amongst ACT consumers (up 17% to 64%).
- Among small business consumers (up 8% to 71%).

"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'



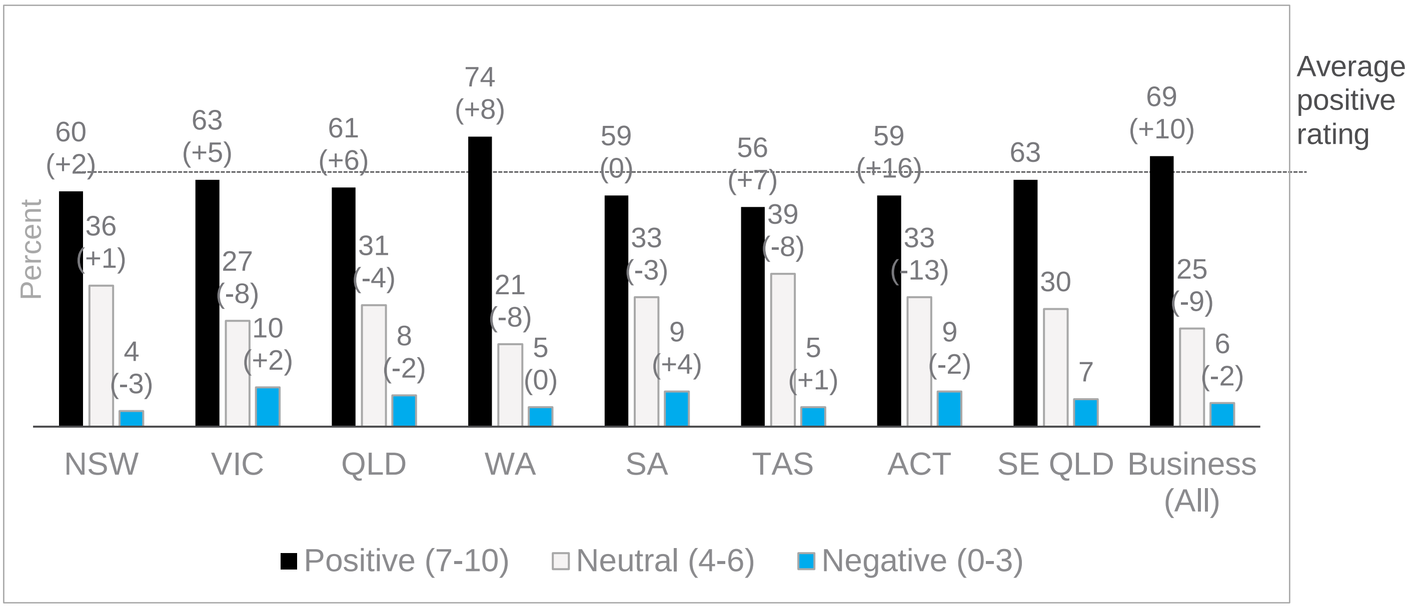
Note: Small sample size for Tasmania (n=59). The numbers in brackets on the chart are the number of retailers operating in the specified market – e.g. there are 8 retailers in NSW.

Overall value for money (Gas)

Satisfaction with value for money was up in all markets except for South Australia

- The largest change is in the ACT where 59% of household consumers rate the value for money of gas positively, up 16% on last year's survey.
- Satisfaction stayed steady at 59% among South Australian household consumers.

> ***"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=59).

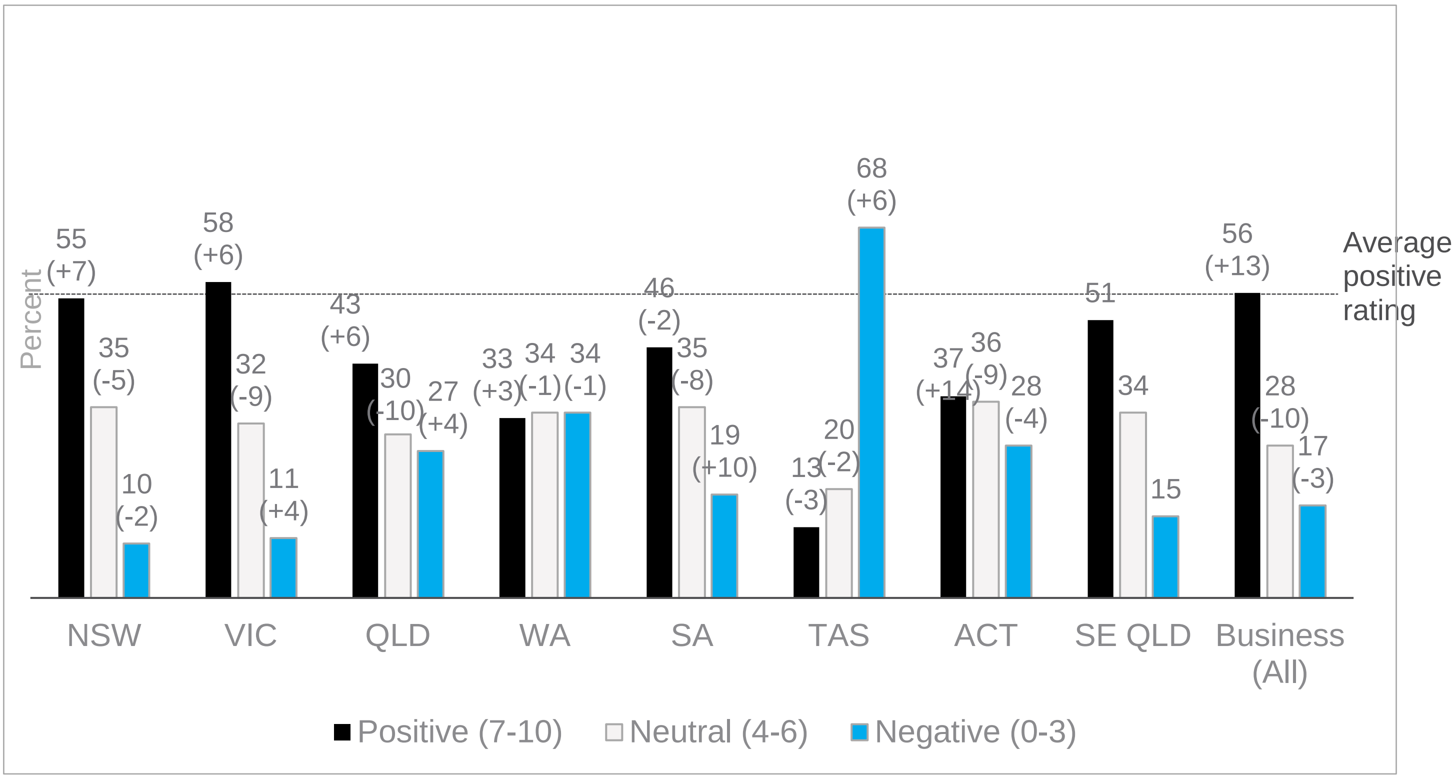
Satisfaction

Level of competition

Satisfaction with levels of competition in the energy market is up in all markets except for South Australia and Tasmania

- 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.
- Satisfaction with competition levels among small business consumers rose by 13% to 55%.

"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'



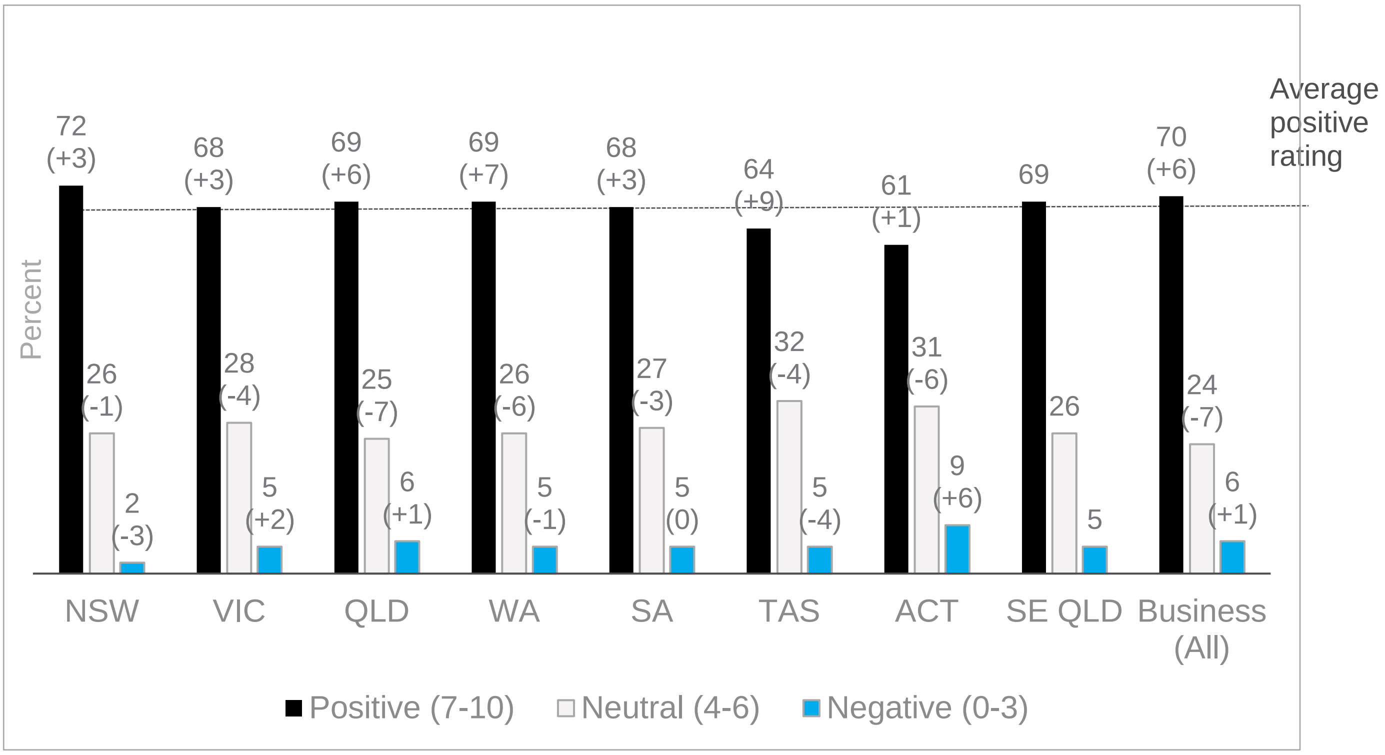
Consumer confidence in their abilities

Consumer confidence in their own ability to make choices about the energy market is up across all markets.

- The largest shifts in households markets were in Tasmania (up 9% to 64%), WA (up 7% to 69%) and Queensland (up 6% to 69%).
- 70% of small business consumers now express confidence in their own ability to make choices, up 6% on last year's 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

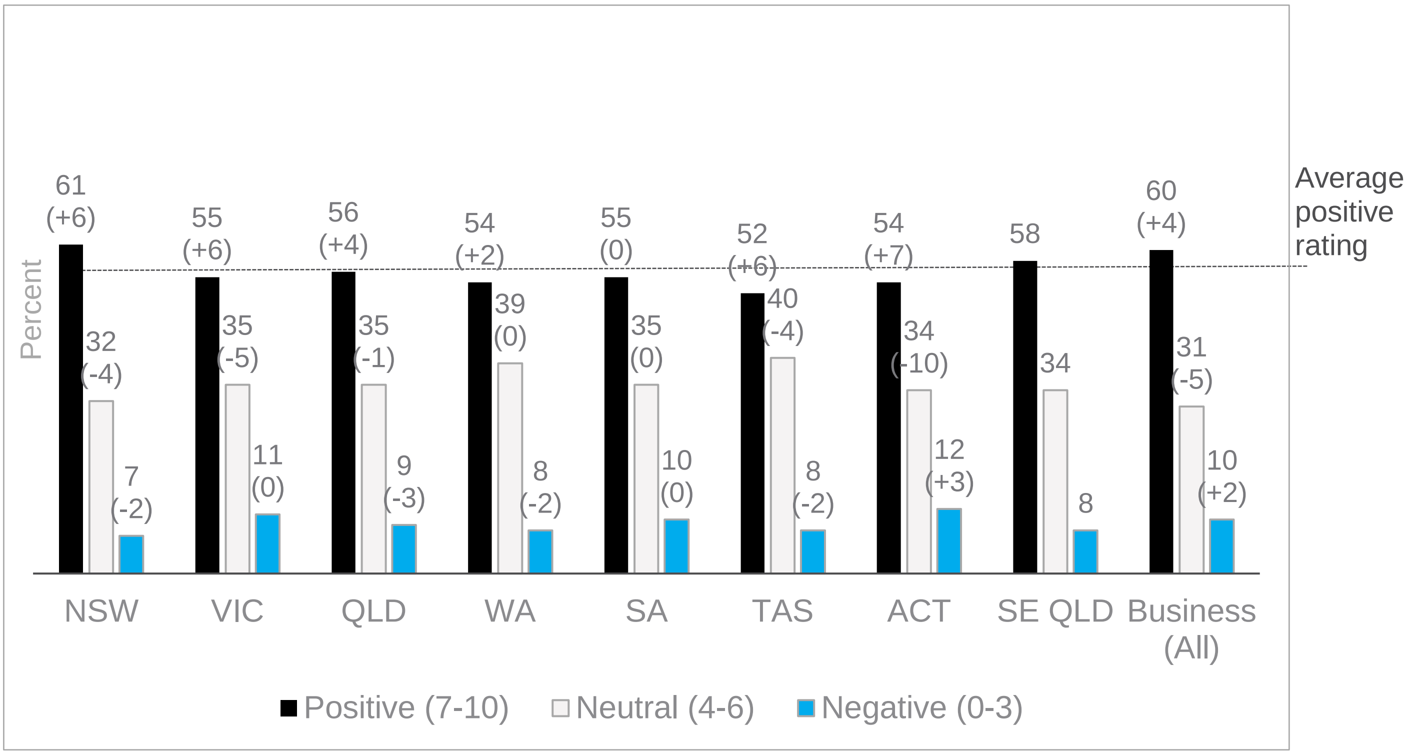
Confidence in the availability of information

The proportion of consumers expressing confidence that there is enough easily understood information available for them to make decisions about energy products and services is up at least slightly across all markets except for South Australia.

- 60% of small business consumers rate this positively, up 4% on last year's survey.
- The largest shifts in household markets were in the ACT (up 7% to 54%), NSW (up 6% to 61%), Victoria (up 6% to 55%) and Tasmania (up 6% to 52%).

"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

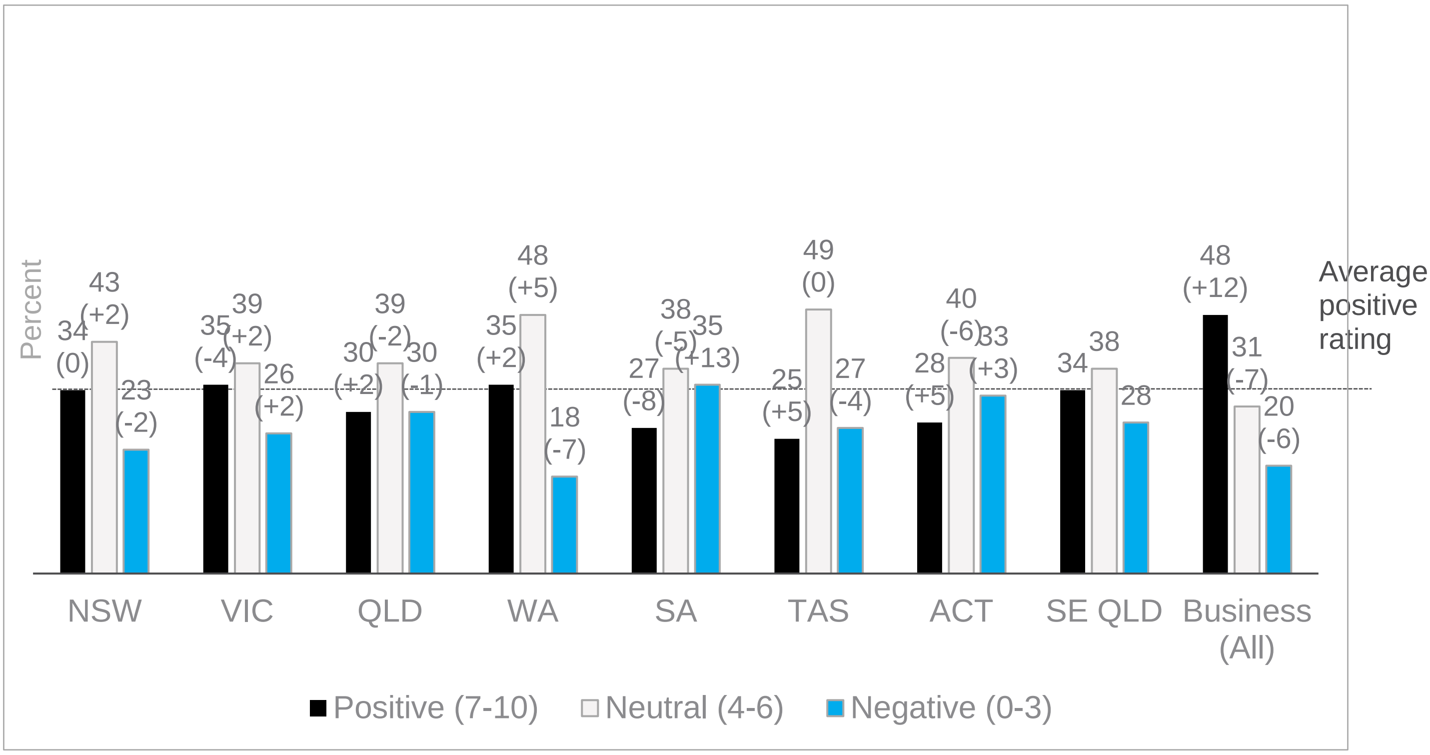
Confidence in the market

There are mixed views as to whether the overall market is working in the consumers' interest.

- The most significant changes are the ratings from small business consumers, up 12% to 48%, and South Australian household consumers, down 8% to 27%

"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

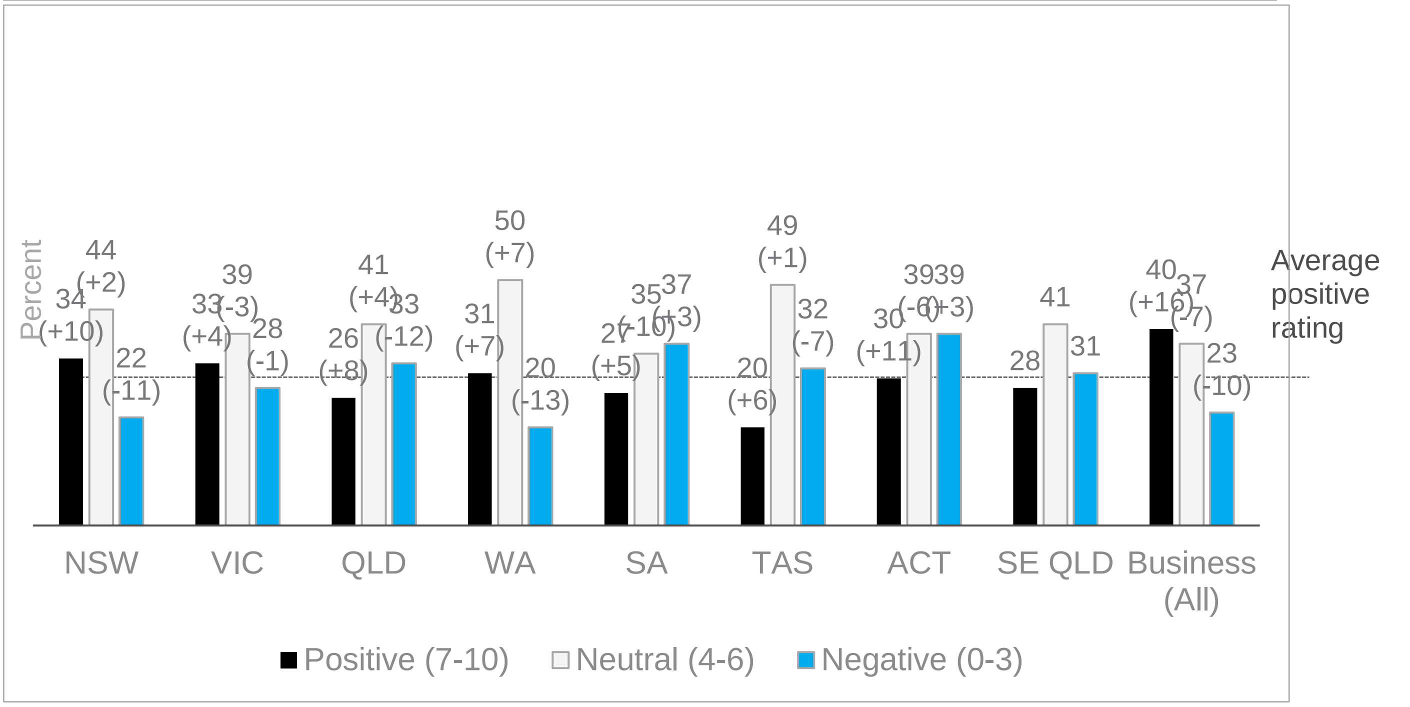
Confidence in the future value for money

Confidence in future value for money increased in all markets.

- The largest increases in confidence were among small business consumers (up 16% to 40%), ACT household consumers (up 11% to 30%) and Victorian residential consumers (up 10% to 34%).

"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

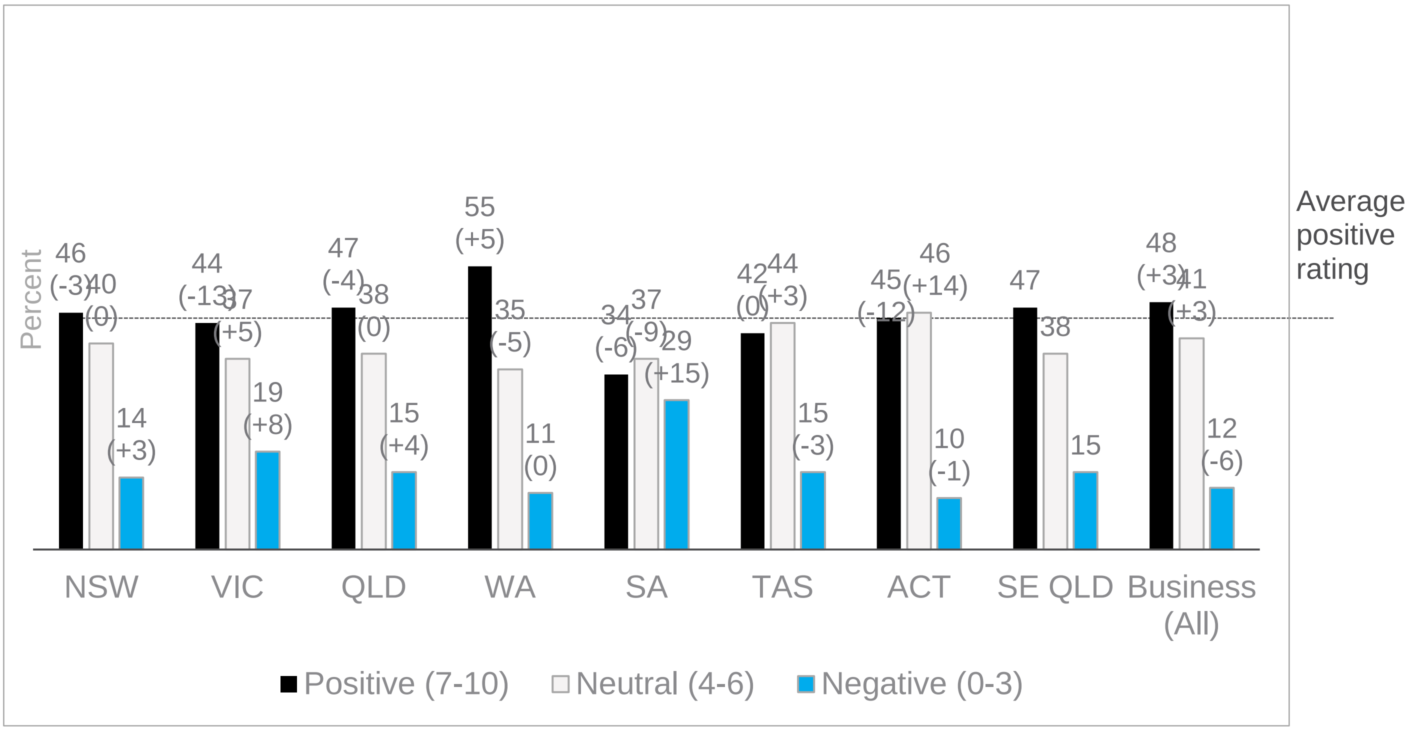
Confidence in future reliability

The proportion of consumers expressing confidence that the market will deliver increased reliability was down for all groups except Western Australian consumers and small business consumers.

- The proportion of Victorian household consumers in this survey confident that the market will deliver greater reliability is, however, 13% lower than in last year's survey, The proportion of ACT household consumers is down 12%.

"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

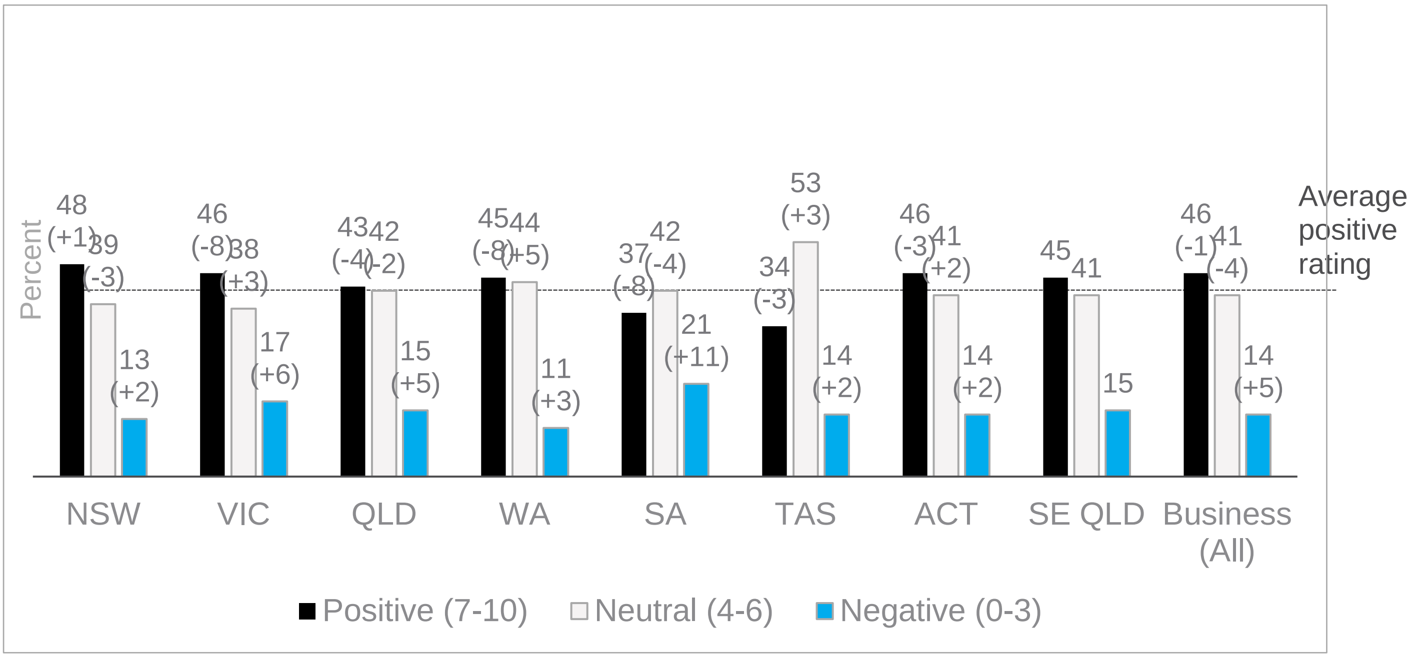
Confidence in future technology

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.

- The largest decreases in confidence were in Victoria (down 8% to 46%), Western Australia (down 8% to 45%) and South Australia (down 8% to 37%).

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

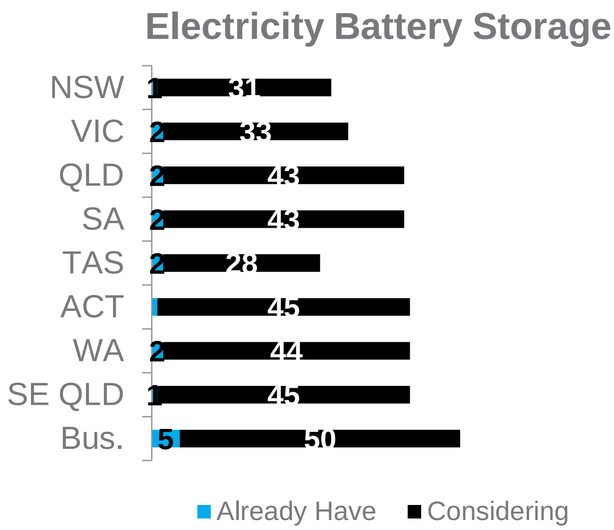
- Energy-efficient light globes are the most prevalent energy technology – each state or territory had at least 86% who were considered or had already purchased them.
- Small businesses are the most likely to be "considering" each technology.

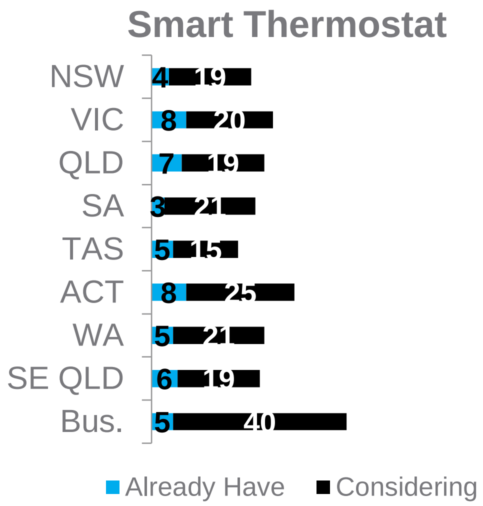
See following pages for charts

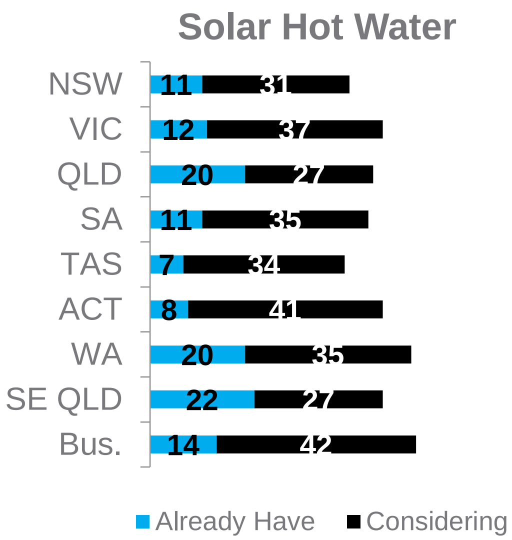
Activity

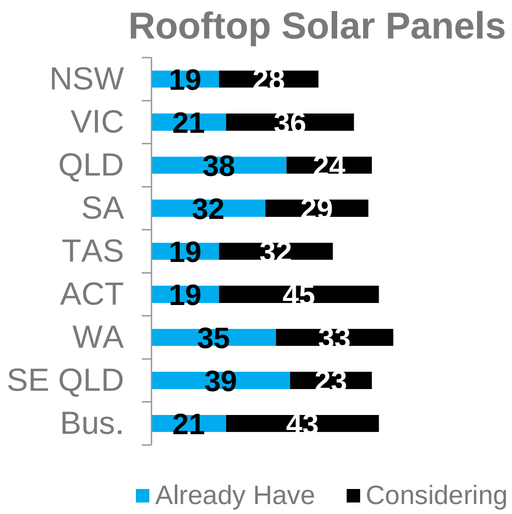
What people are thinking about investing in technology

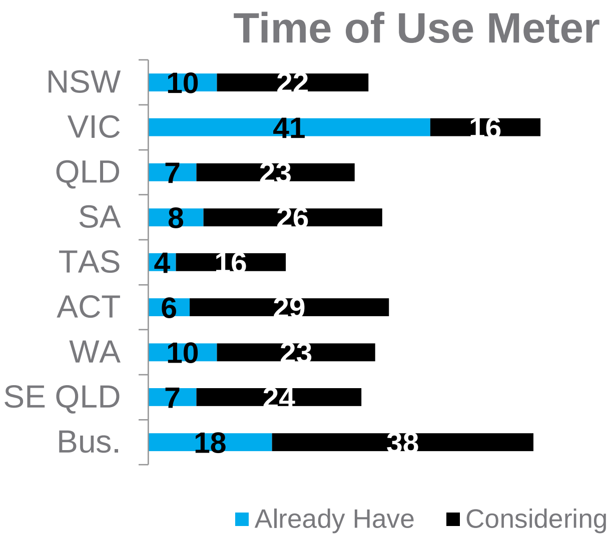
Do you already have or are you considering purchasing or using any of the following technologies to manage the cost of electricity in your household / business?

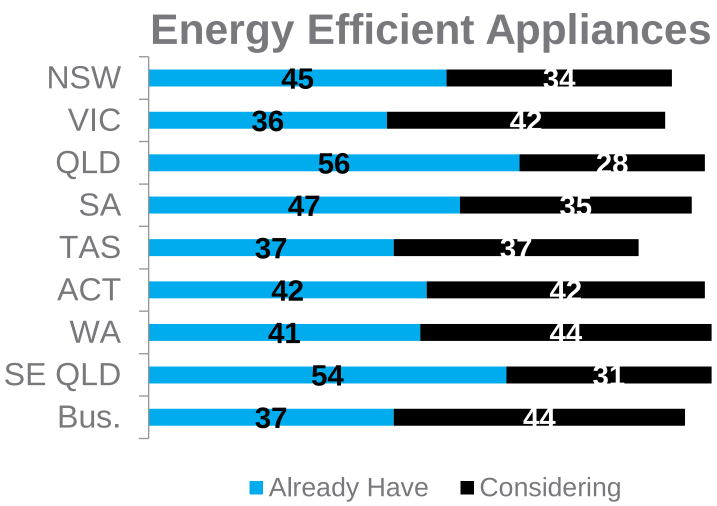


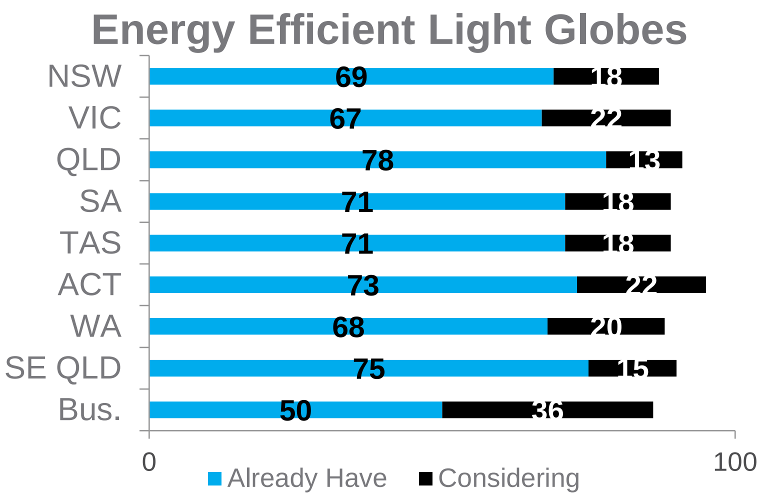







Time of Use Meter
NSW
VIC
QLD
SA
TAS
ACT
WA
SE QLD
Bus.
10 22
41 16
7 23
8 26
4 16
6 29
10 23
7 24
18 38
Already Have
Considering


Energy Efficient Appliances
NSW
VIC
QLD
SA
TAS
ACT
WA
SE QLD
Bus.
45 34
36 42
56 28
47 35
37 37
42 42
41 44
54 31
37 44
Already Have
Considering


Energy Efficient Light Globes
NSW
VIC
QLD
SA
TAS
ACT
WA
SE QLD
Bus.
69 18
67 22
78 13
71 18
71 18
73 22
68 20
75 15
50 36
0
100
Already Have
Considering

Activity

Consumers who considered switching in the last 3 years

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

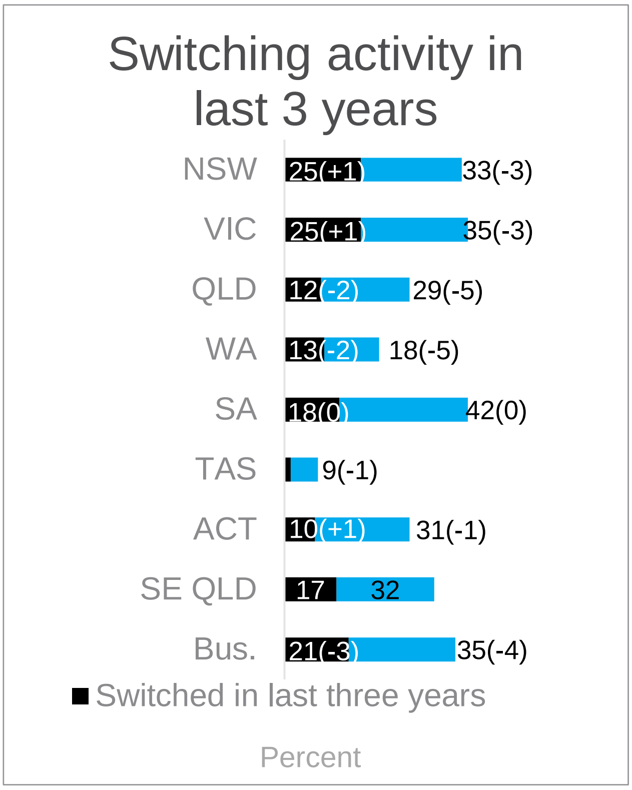
- The proportions were highest in those states where retail prices have been dergulated in recent years – 60% in Victoria, 58% in NSW, 60% in SA and 41% in Queensland (where electricity price regulation was removed on 1 July 2016).

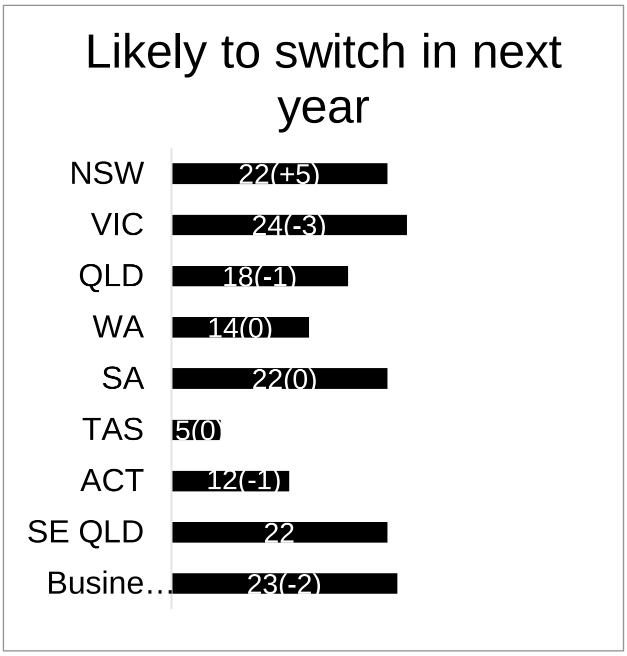
There were small changes in the proportions of consumers that say they switched providers or plans in the last 3 years.

- 25% In Victoria and New South Wales, where switching rates were highest, there was an increase in the proportion of household consumers that had switched in the last three years, up 1% on last year's 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.
- 89% of Tasmanian consumers did not switch or consider switching in the past three years (up 3%). This is the highest amongst all states.





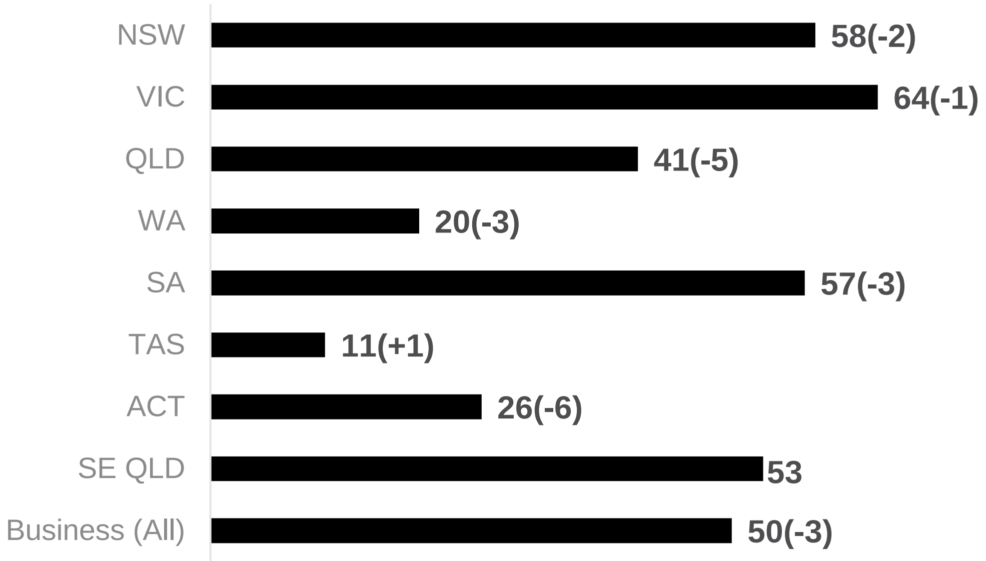
Activity

Switching behaviour

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

- 80% of Western Australians say they have never switched energy companies or plans, as do 89% of Tasmanian consumers.
- On the other hand, 64% of Victorians, 58% of NSW household consumers and 57% of South Australians 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?"

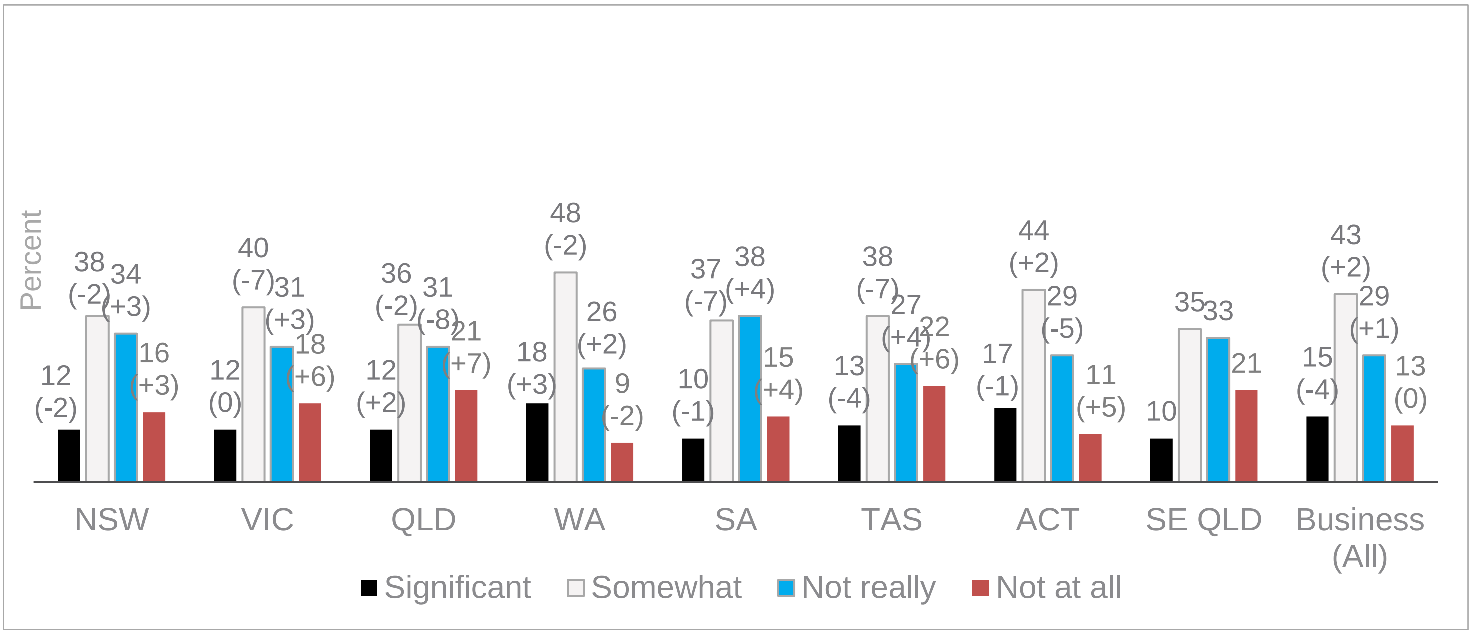


Consideration of the environment

Environmental consciousness is down in most states

- The only states with even marginal increases in environmental consciousness were WA (up 1% to 66%) and the ACT (up 1% to 61%).
- The largest declines in environmental consciousness were in Tasmania (down 11% to 51%), South Australia (down 8% to 47%) and Victoria (down 7% to 52%).

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



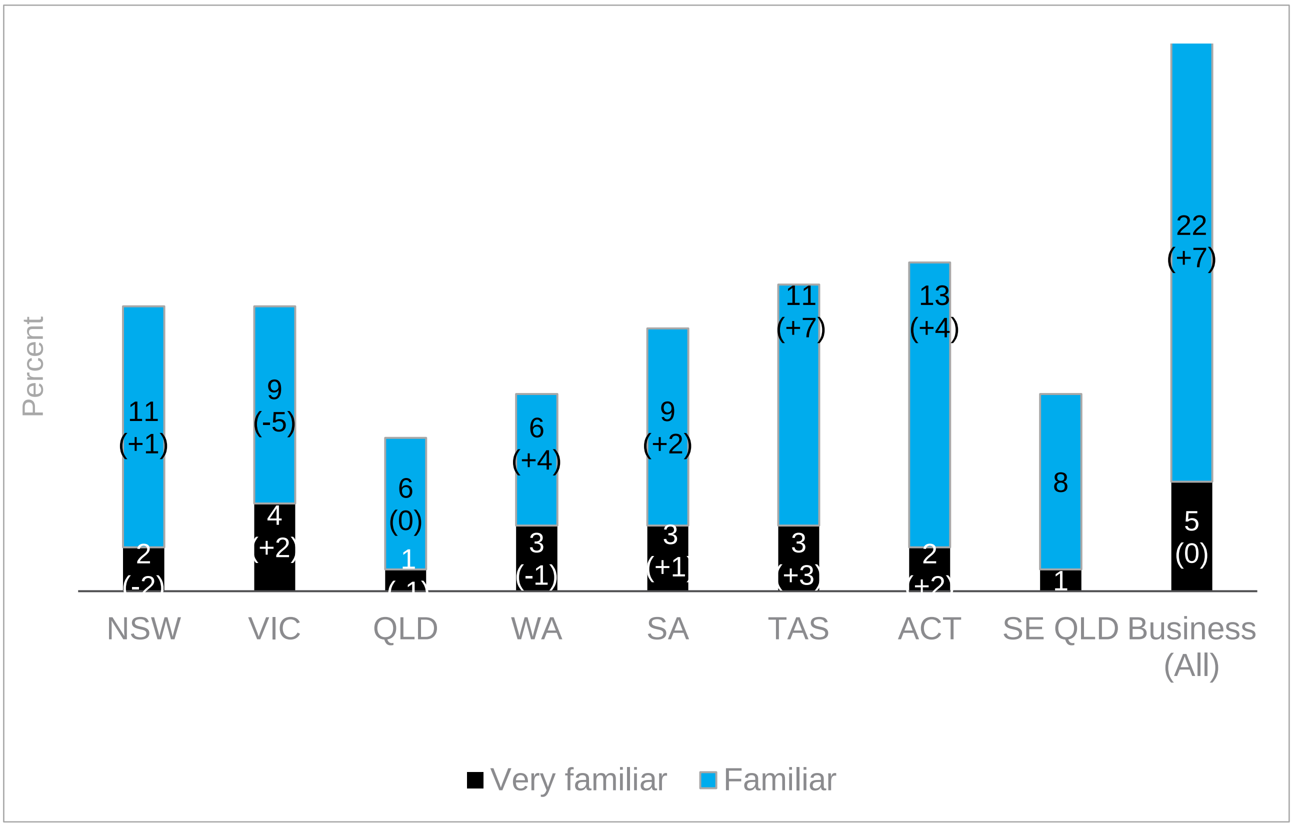
Other

Awareness of ECA

Awareness of Energy Consumers Australia is up in some markets.

- Awareness is up among small business consumers, with 27% claiming to be familiar with the organisation (up 7%).
- There is also a 10% increase (to 14%) amongst Tasmanian household consumers.

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

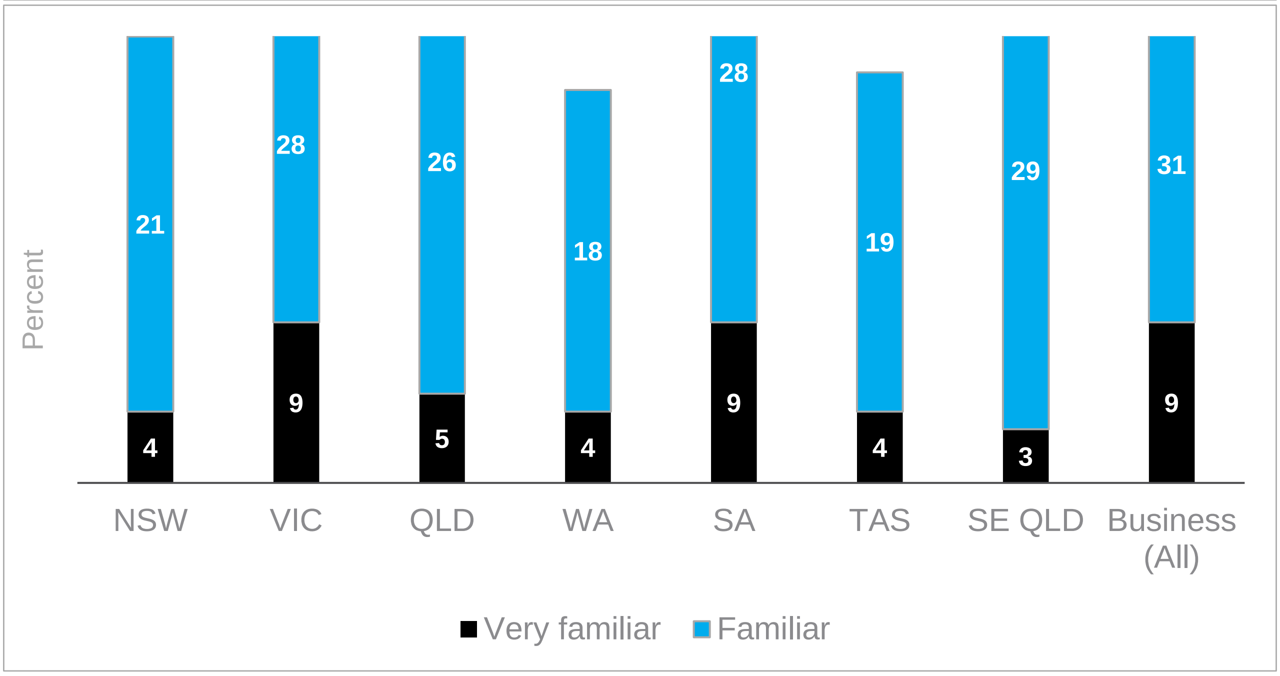


Awareness of the Energy Ombudsman

Awareness of Energy Ombudsman is highest among small business consumers.

- Awareness is highest among small business consumers, 40% claim to be familiar with the Ombudsman.
- Declared awareness is also high in Victoria (37% aware) and SA (37%)
- Declared awareness is lowest in WA (22% aware), Tasmania (23%), and NSW (25%).

"How familiar are you with an organisation called the Energy Ombudsman, which assists consumers with complaints about energy? ?"



Small business

Satisfaction

Overall satisfaction

Satisfaction with electricity and gas services overall amongst small business consumers is up.

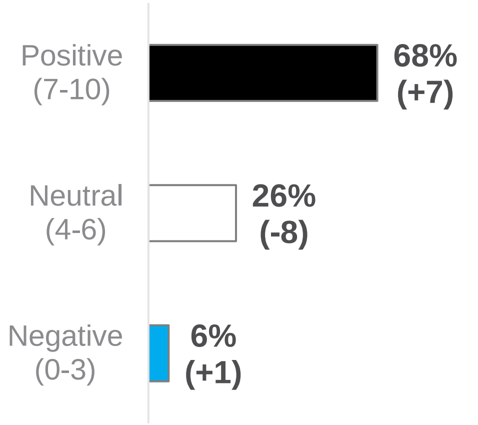
- 68% now say they are satisfied overall, up 7% since the March / April 2017 survey.

Small business consumers have also become more satisfied with the levels of competition in their local area.

- 56% now report being satisfied, up 13% on last year.

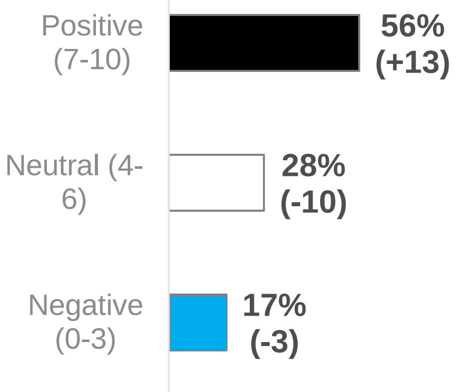
Overall satisfaction

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?



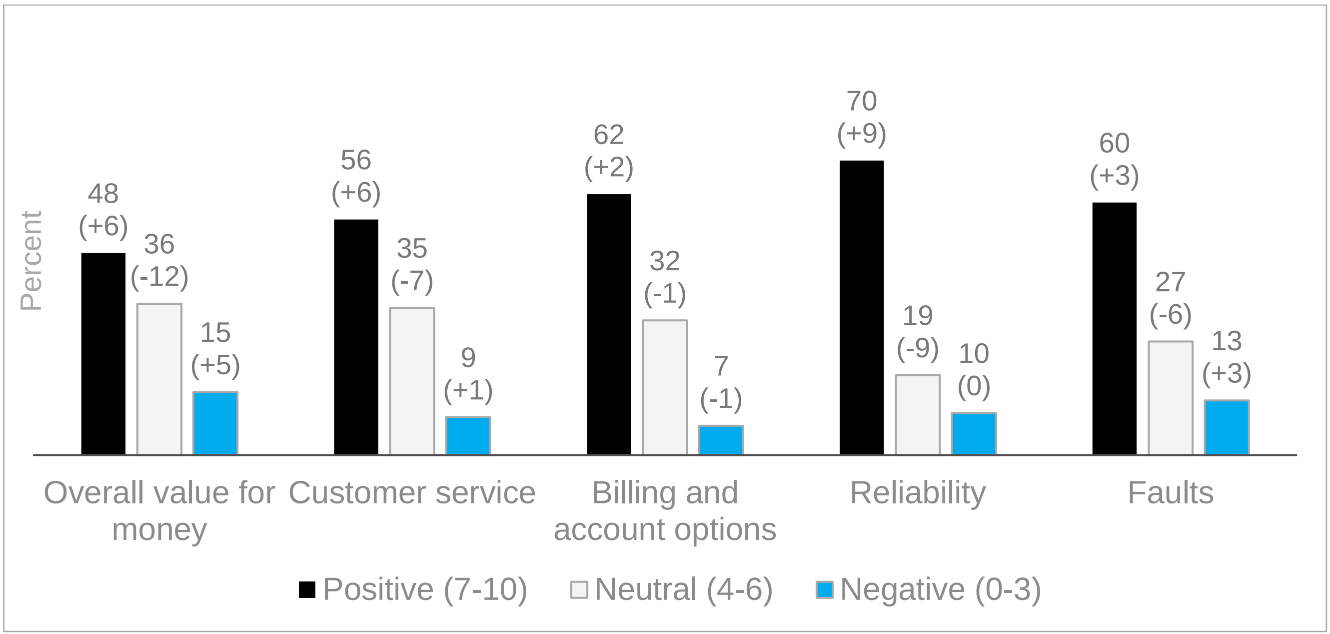
Satisfaction

Electricity – satisfaction with value for money & reliability

Ratings from small business consumers are up at least slightly on last year for all five of these measures .

- The biggest changes are for reliability (up 9% to 70%) and customer service (up 6% to 56%).

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



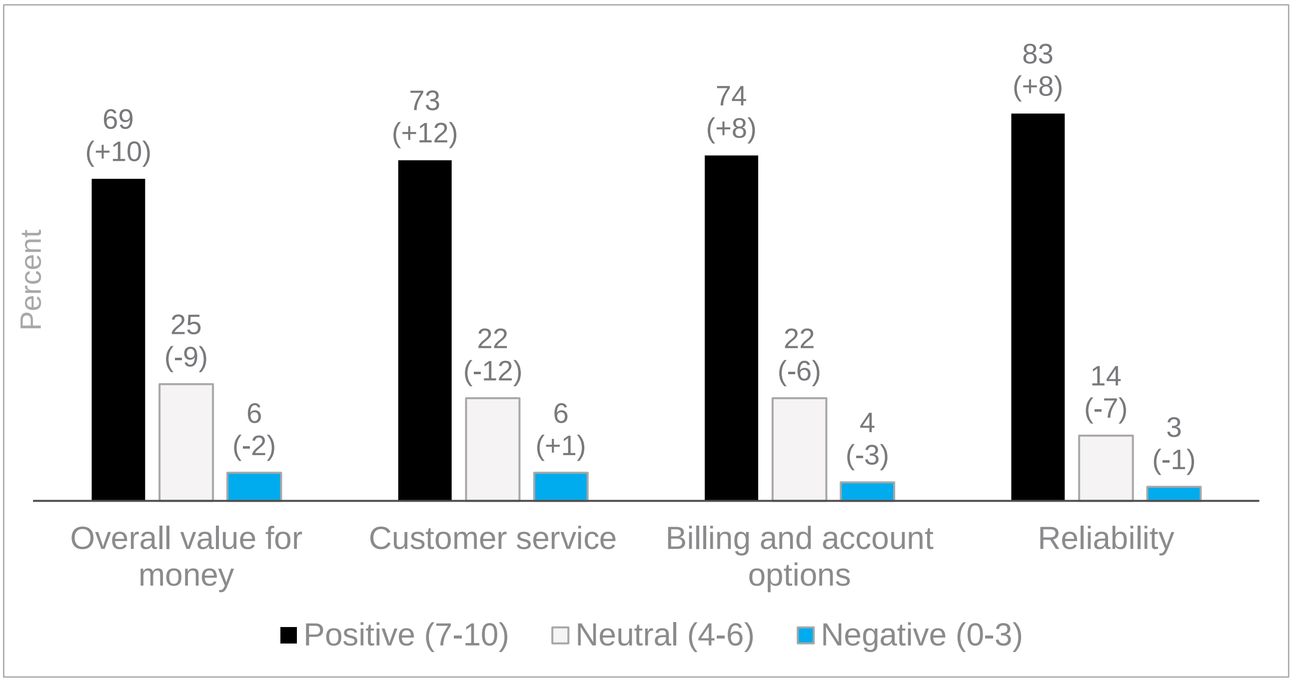
Satisfaction

Satisfaction with gas

Small business consumers' ratings for gas have all increased from last year.

- 69% are satisfied with their overall value for money, up 10% since last year's survey.
- 73% are satisfied with the customer service they receive from their gas retailer, up 12% from last year.

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



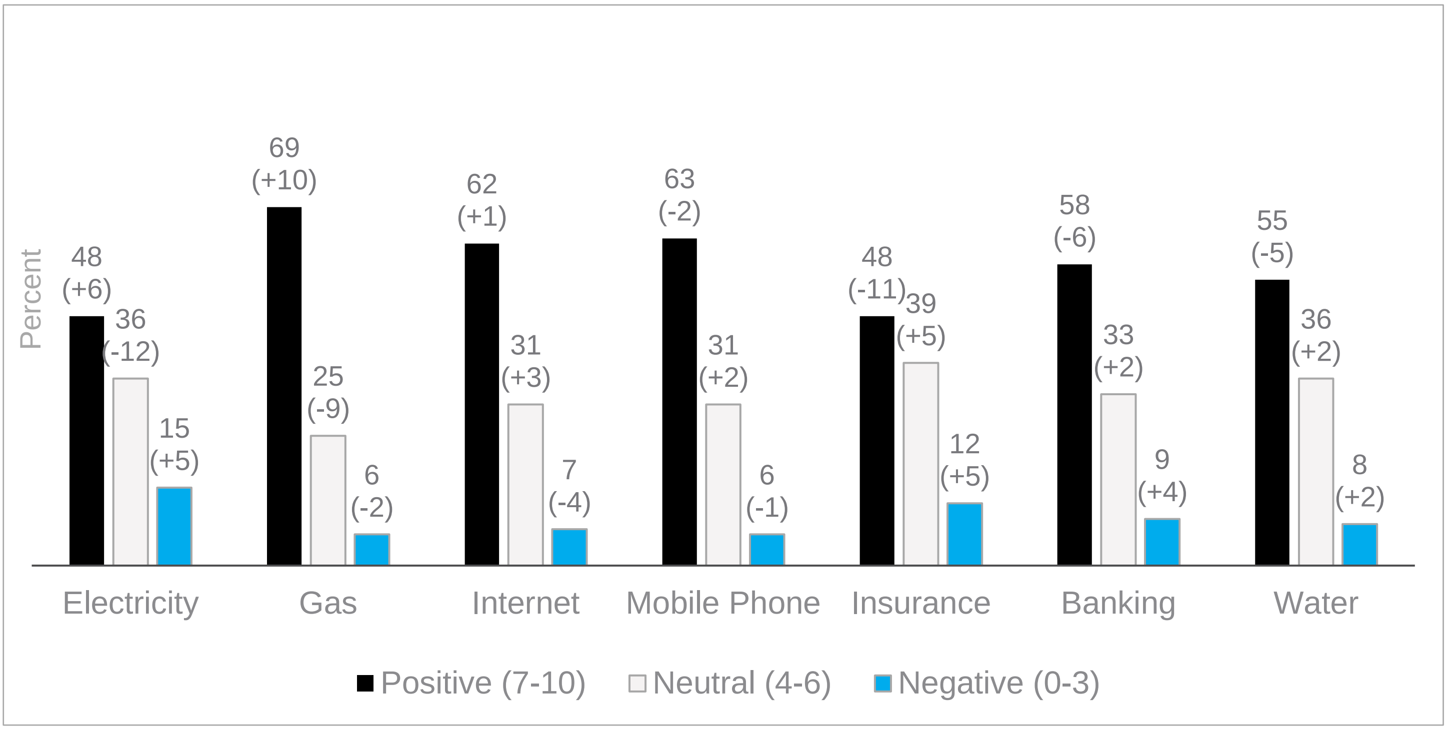
Base: Small business consumers with gas (n=182)

Satisfaction with utilities

When compared to other utilities, gas now gets the best value for money rating, while electricity provides the equal worst.

- The 6% increase in the proportion satisfied with the value for money of electricity puts it to 48%, but this is still the equal lowest satisfaction level, along with insurance.
- The 10% increase in the proportion satisfied with the value for money of gas puts it to 69%, making it the utility with the highest satisfaction level.

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



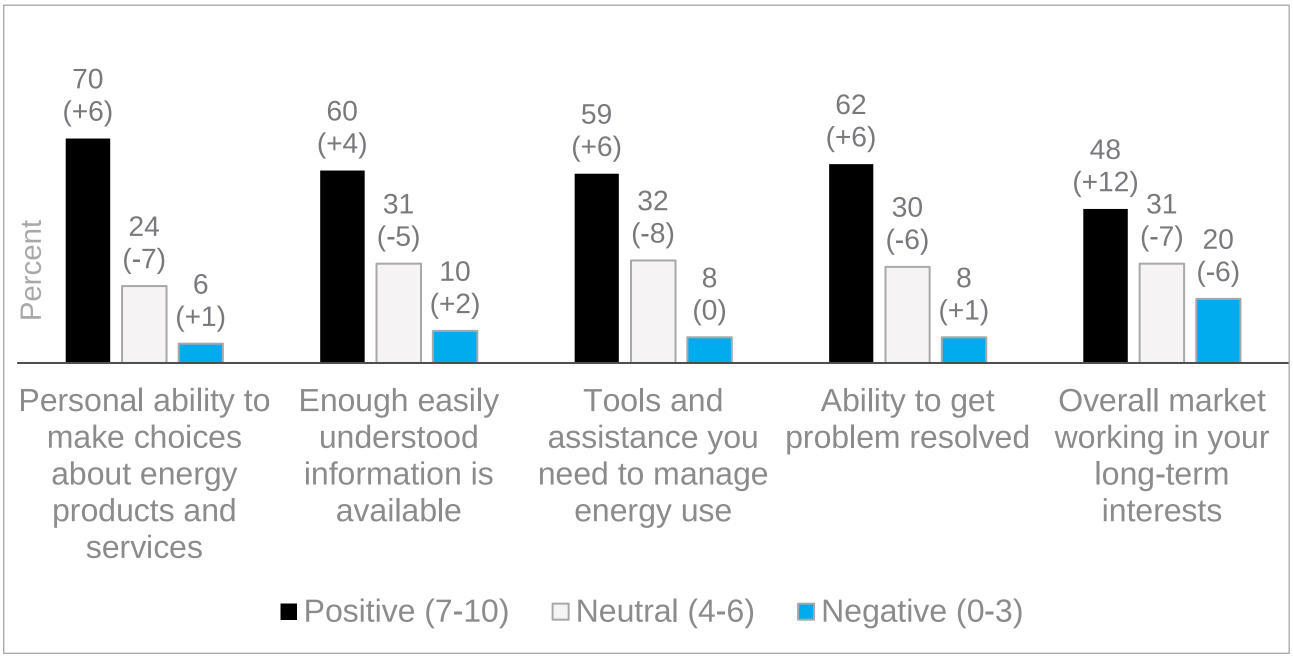
Confidence

Confidence in information and tools

Confidence in each category has increased.

- 48% of small business consumers who believe the overall market is working in their long terms interests, an increase of 12%. This was the largest increase
- 70% of small business consumers say they are confident in their personal ability to make choices about energy products and services, up 6%. This is the category with the highest level of confidence

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



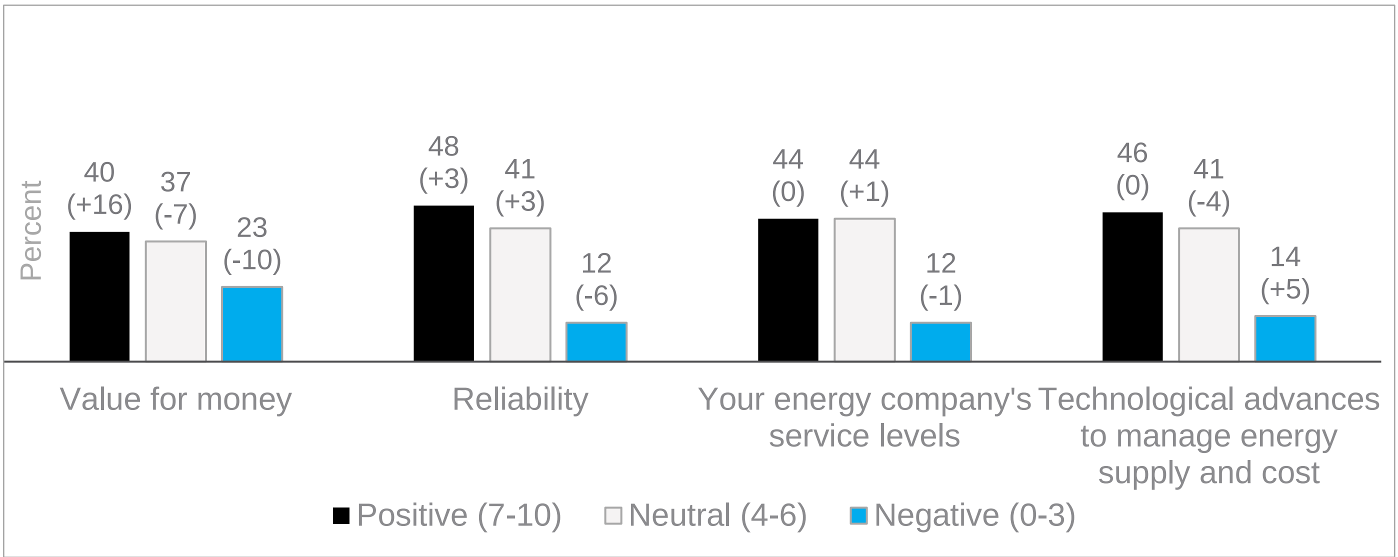
Confidence in long-term outcomes

Small business consumers in the latest survey were more likely to express confidence in the long-term outcomes value for money and reliability.;

- The proportion confident that the market will deliver better value for money in the long term is up 16% since last year's survey, to 40% in total.
- There is also a 3% increase in the proportion confident in the market delivering better reliability in the long-term (now 48%)
- There was no change in confidence for other categories.

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'



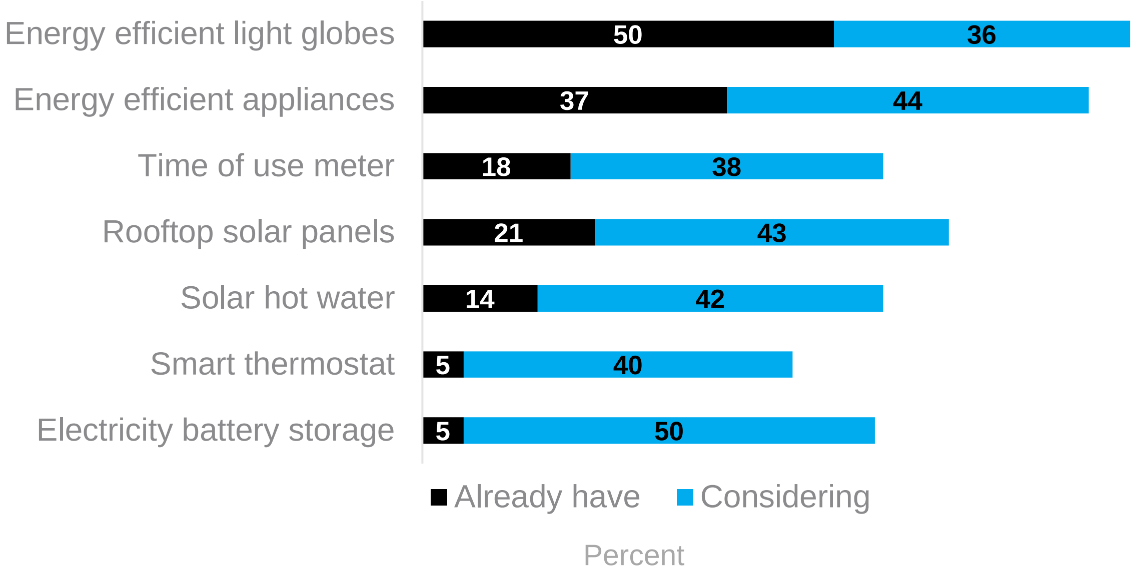
Activity

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 were asked about their household, and are not included in this data. There is clear potential to increase usage of all technologies, each of which had at least 38% of small business consumers “considering” them..

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?



Activity

Switching behaviour

The proportion of small business consumers who say they have considered switching in the last three years has decreased.

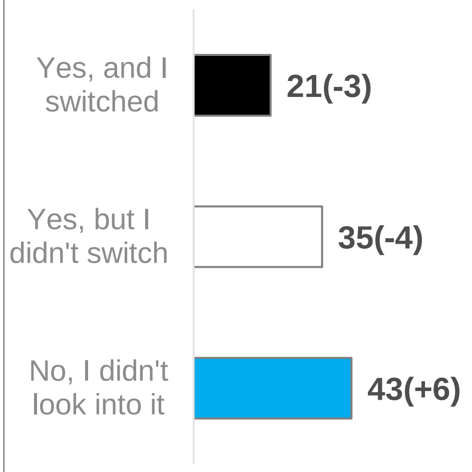
- 56% considered switching made up of 21% that say that they actually switched (down 3%), while 35% looked at doing so but did not (down 4%).

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

- 23% say that they intend to switch, down 2% since March / April 2016.

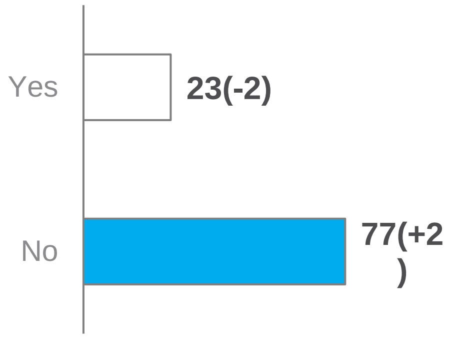
Previous behaviour

"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?



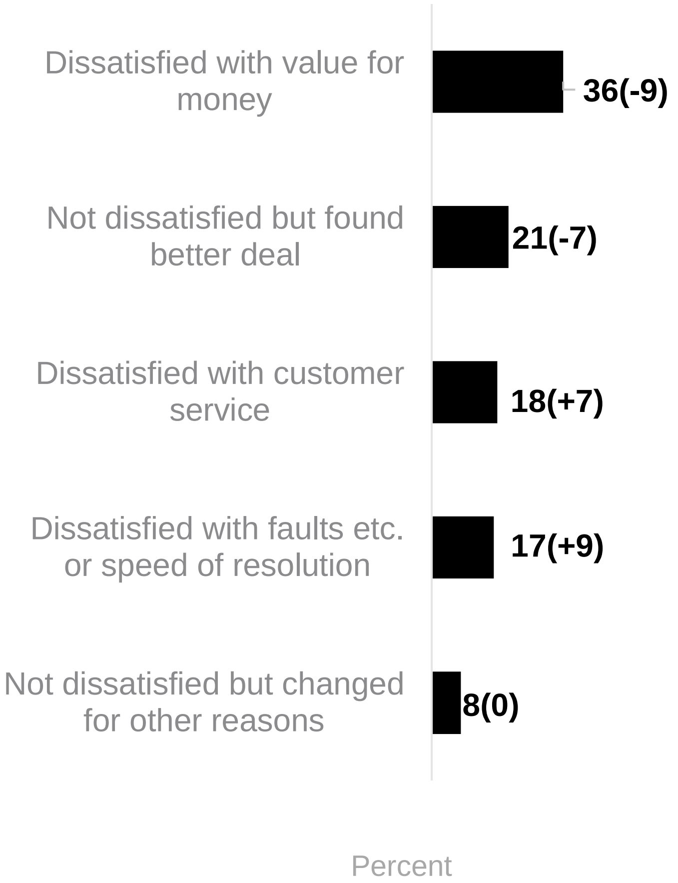
Activity

Reasons for considering switching

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

- 36% said that they considered switching because they were dissatisfied with the value for money they received, down 9% since last year's survey.
- There have been increases in the proportions saying they considered switching because they were dissatisfied with customer service (up 7% to 18%) 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=156)

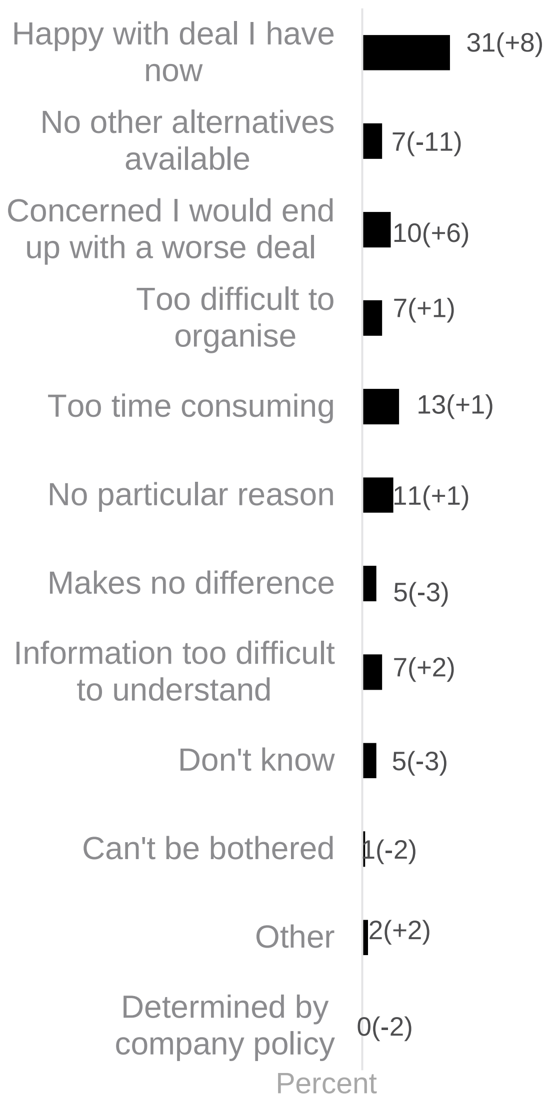
Activity

Reasons for not switching

There was an increase in people who are satisfied with their current deal, and a decrease in those with no other alternatives available.

- 31% say that they are satisfied with the deal they have now (up 8%).
- 7% say that they had not looked at switching because there were no other alternatives available (down 11%).
- 27% now say that the barriers are too high (too difficult, too time consuming or too difficult to understand), up 4%
- 10% now say they are concerned they would end up with a worse deal (up 6%).

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



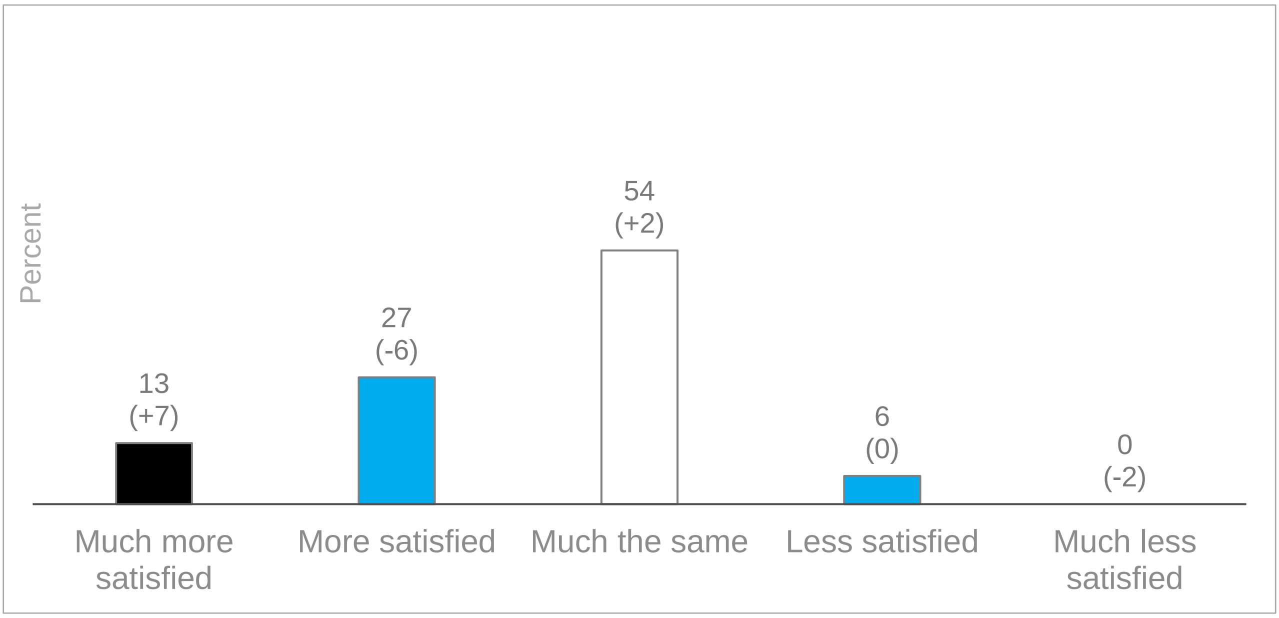
Base: Small business consumers who had not considered switching in the last 3 years (n=124)

Activity

Satisfaction after considering switching

40% 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 1% since last year.

"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=156)

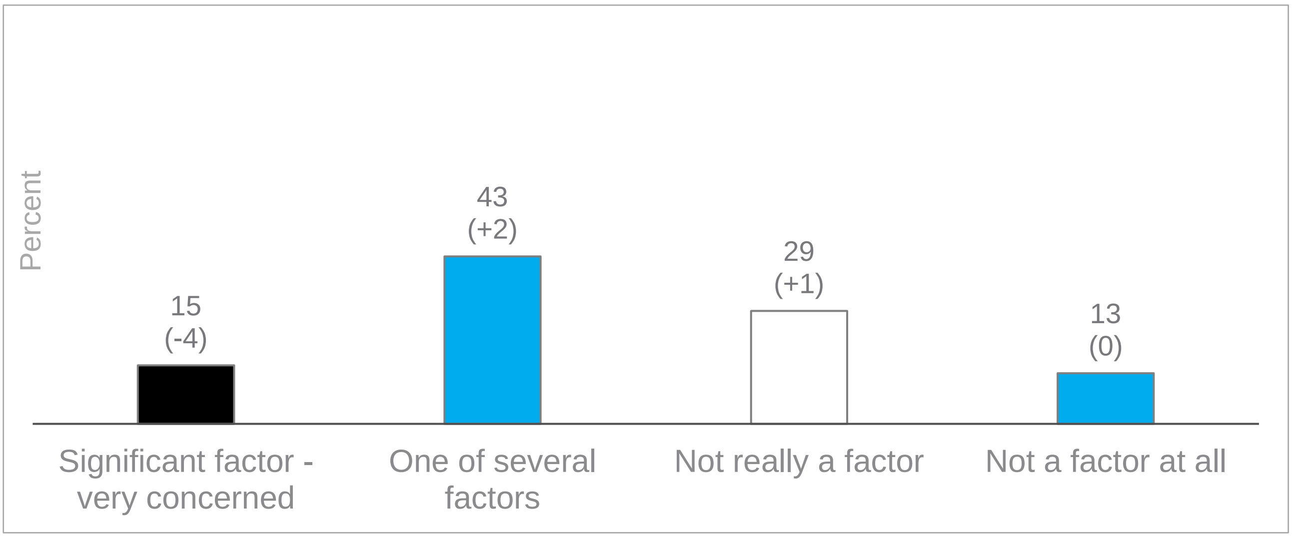
Activity

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 down 2% to 58%.

- This is mainly due to a 4% decrease in the proportion saying that it is a significant factor, while there is a 2% increase in the proportion saying it is one of several factors.

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



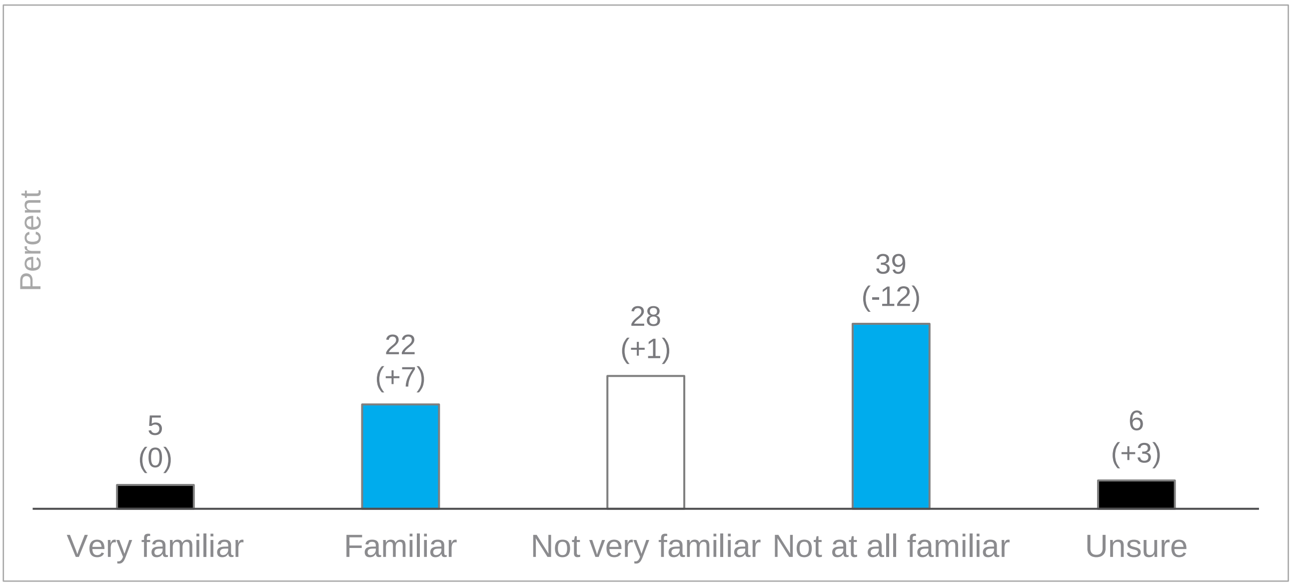
Other

Awareness of ECA

27% of small business consumers claim to be familiar with Energy Consumers Australia, up 7% since last year's survey.

- 5% say that they are 'very familiar' (no change) and 22% are simply 'familiar' (up 7%).

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



New South Wales

Overall satisfaction

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

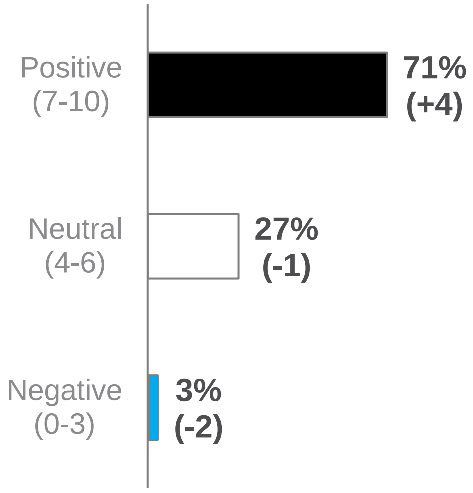
- 71% are satisfied, up 4% since March / April 2016.
- 27% are neutral (down 4%), while 3% are negative (down 2%).

Satisfaction with the level of competition is also up. 55% say they are satisfied with the level of competition, up 7% since March / April 2016.

Satisfaction

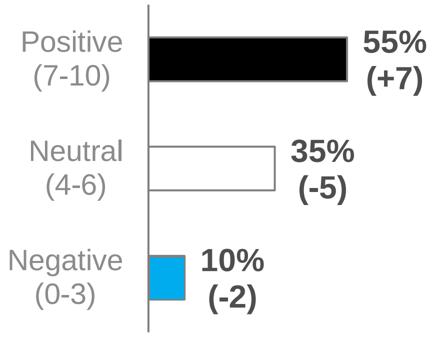
Overall satisfaction

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?



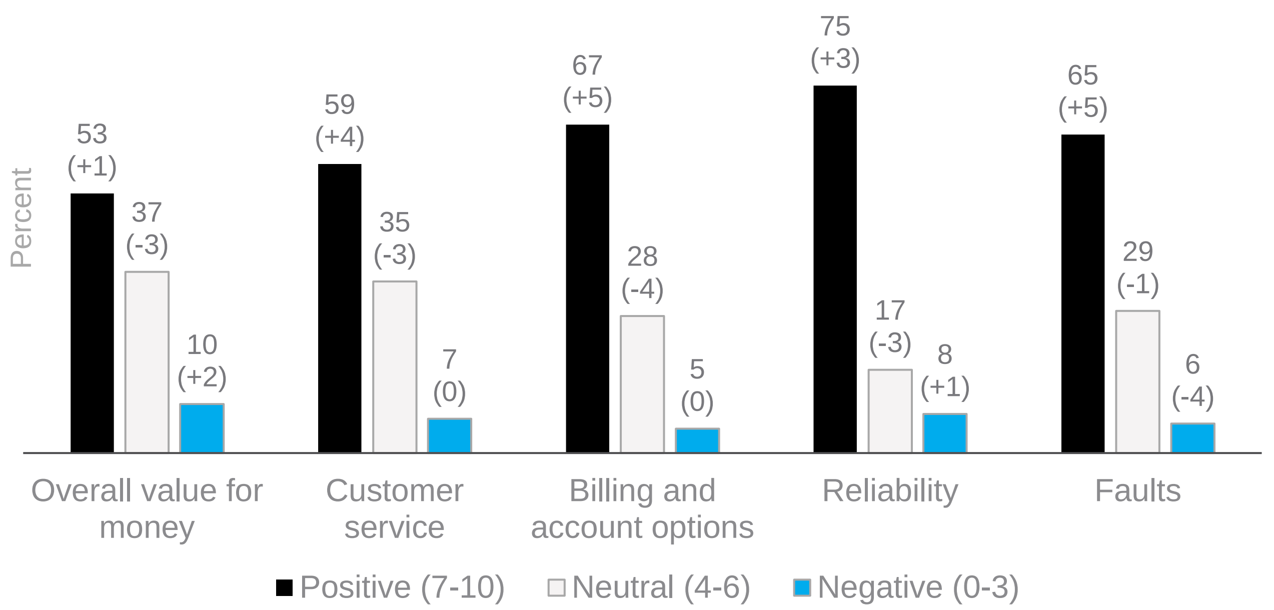
Satisfaction

Satisfaction with electricity

There are some signs of improvement on these measures.

- 67% are now satisfied with the billing and account options (up 5%)
- 59% are satisfied with customer service (up 4%).

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



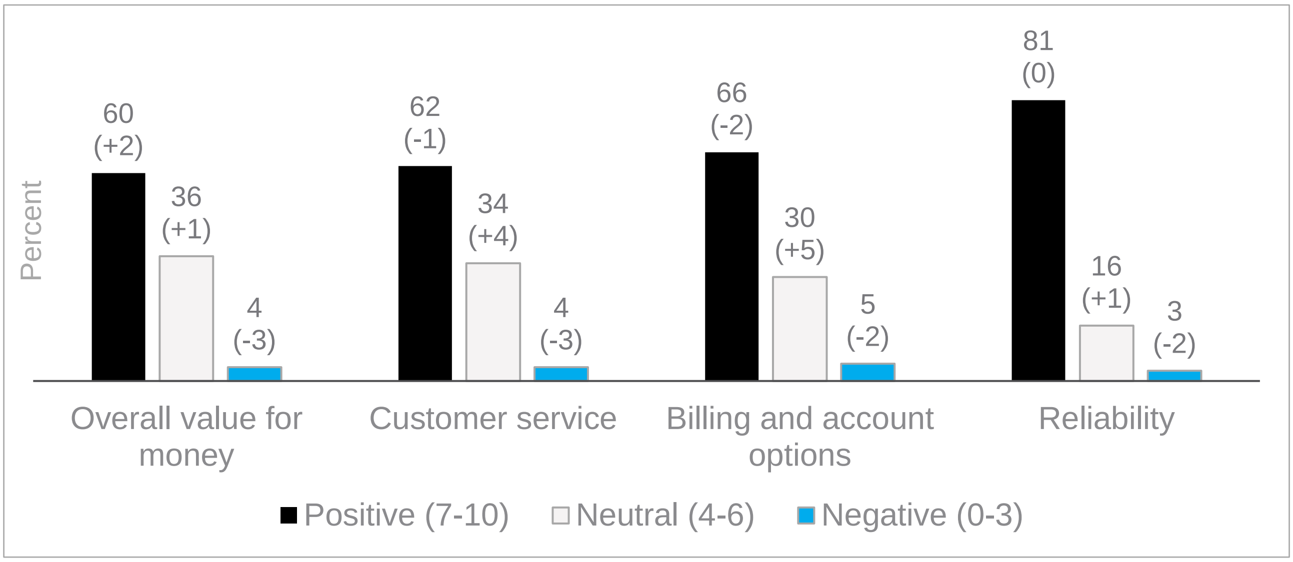
Satisfaction

Satisfaction with gas

There was little difference in satisfaction with gas for NSW household consumers since last year's survey

- 60% are satisfied with the value for money they get for gas, up 2% since March / April 2016.
- 62% are satisfied with their gas company's customer service, (down 1%).
- 81% say they are satisfied with the reliability of gas (no change).
- 66% are satisfied with the billing and account options (down 2%).

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



Base: New South Wales consumers with gas (n=215)

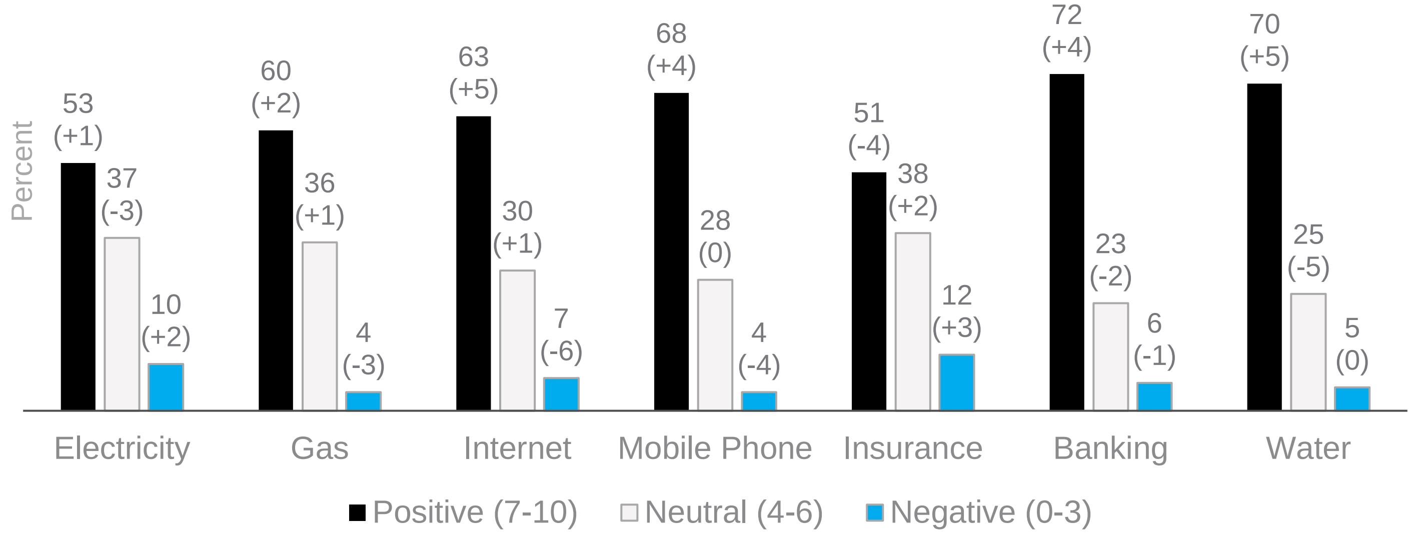
Satisfaction

Satisfaction with utilities

Value for money ratings for electricity and gas from NSW household consumers trails that of most other utilities

- Only insurance, with a satisfaction rating of 51%, is lower than that of electricity (53%) and gas (60%).
- This is in part because the rate of increase in satisfaction for other utilities (all between 4-5%) is higher than that of gas and electricity.

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



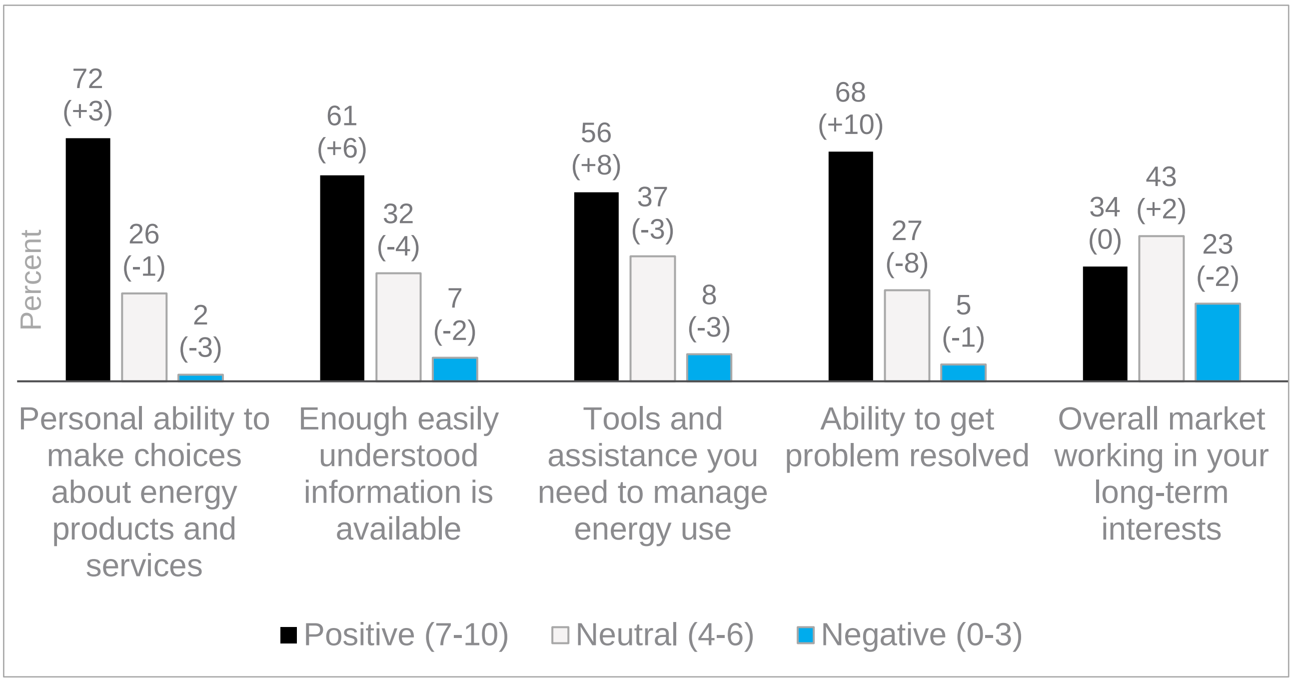
Confidence

Confidence in information and tools

NSW household consumers in this survey are more likely than those in the previous survey to say they are confident in most areas.

- 68% say that they are confident in their ability to get problems resolved (up 10%).
- 56% say they are confident about tools and assistance they need to manage energy use (up 8%).
- 61% say they are confident in there being enough easily understood information (up 6%).

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



Confidence

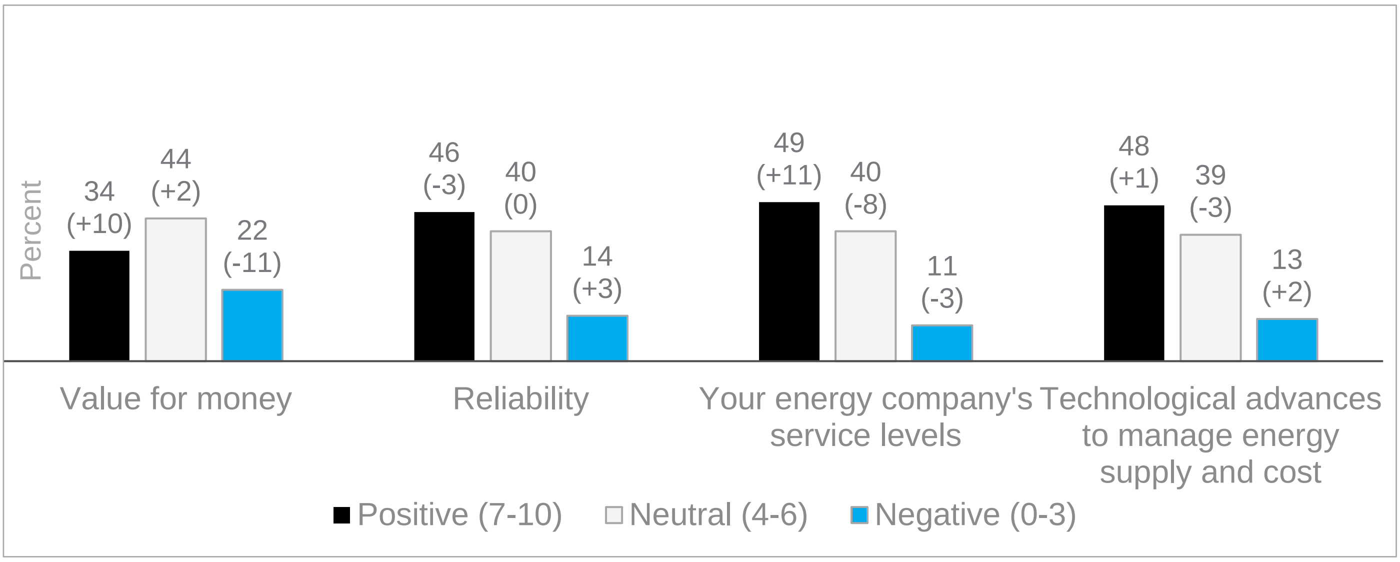
Confidence in long term outcomes

Confidence in value for money and service levels has increased.

- 49% said that they are confident in long-term outcomes for their energy company's service levels, up 11% from March/April 2016.
- 34% said that they are confident in long-term outcomes for value for money (up 10%).

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'



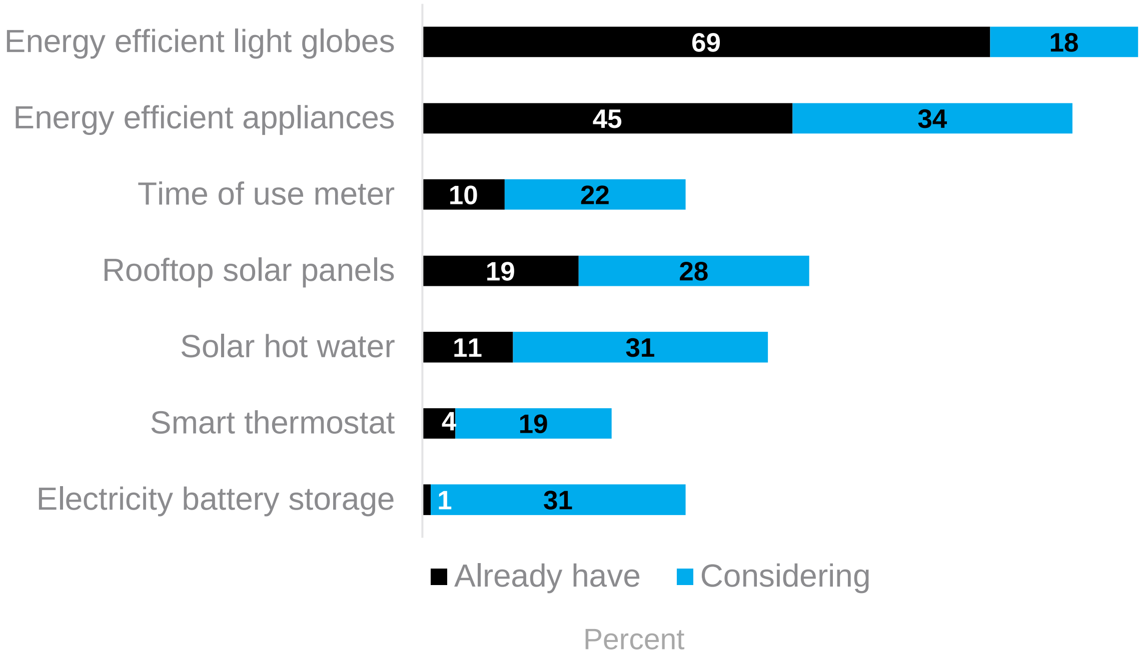
Activity

Uptake of technologies

NSW household consumers show solid interest in purchasing more energy efficient appliances.

- 34% say that they are considering energy efficient appliances
- 31% claim to be considering solar hot water, and 28% say they are considering rooftop solar panels.

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

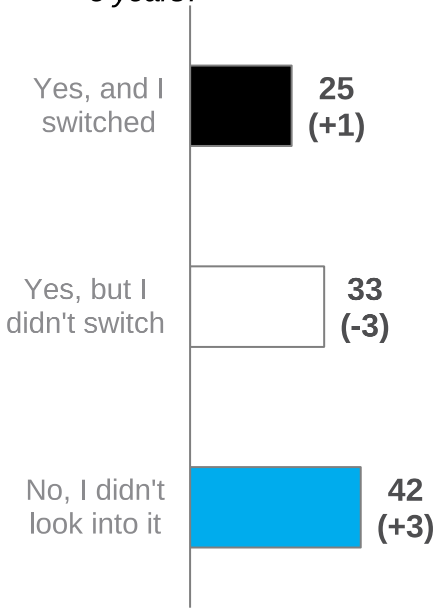
Switching behaviour

58% 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 2% since March / April 2016.

- This drop is from those who report having looked but not switched (down 3% to 33%).

Previous behaviour

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



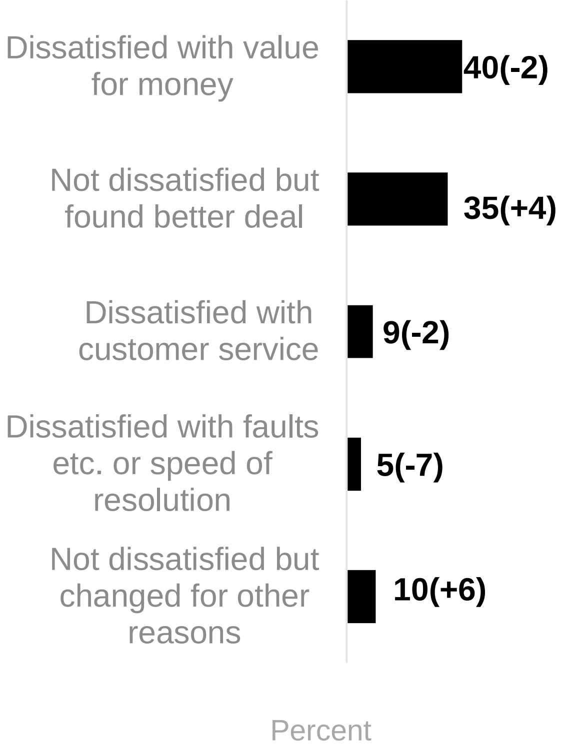
Activity

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.

- 40% say that the main reason is that they were dissatisfied with the value for money, down 2%.
- 10% say they were not dissatisfied, but changed for other reasons up 6%.
- 5% said they considered changing because they were dissatisfied with faults or their speed of resolution (down 7%).

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=231)

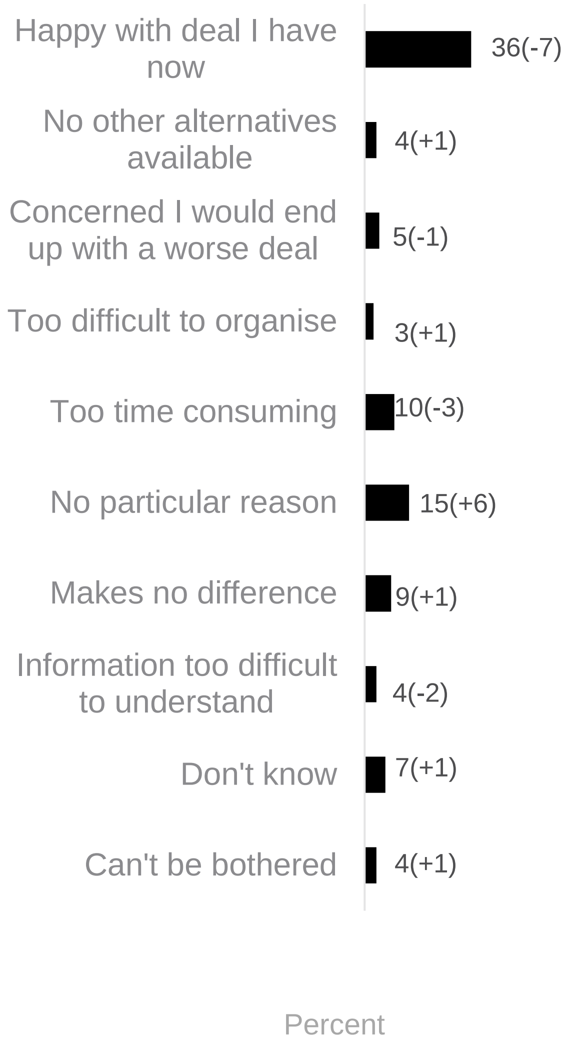
Activity

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 it is still the most common reason.

- 36% say that they had not considered switching because they are satisfied with the deal they have now, down 7% since March/April 2016.
- 15% now say that they had not looked at switching for no particular reason (up 6%).

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=169)

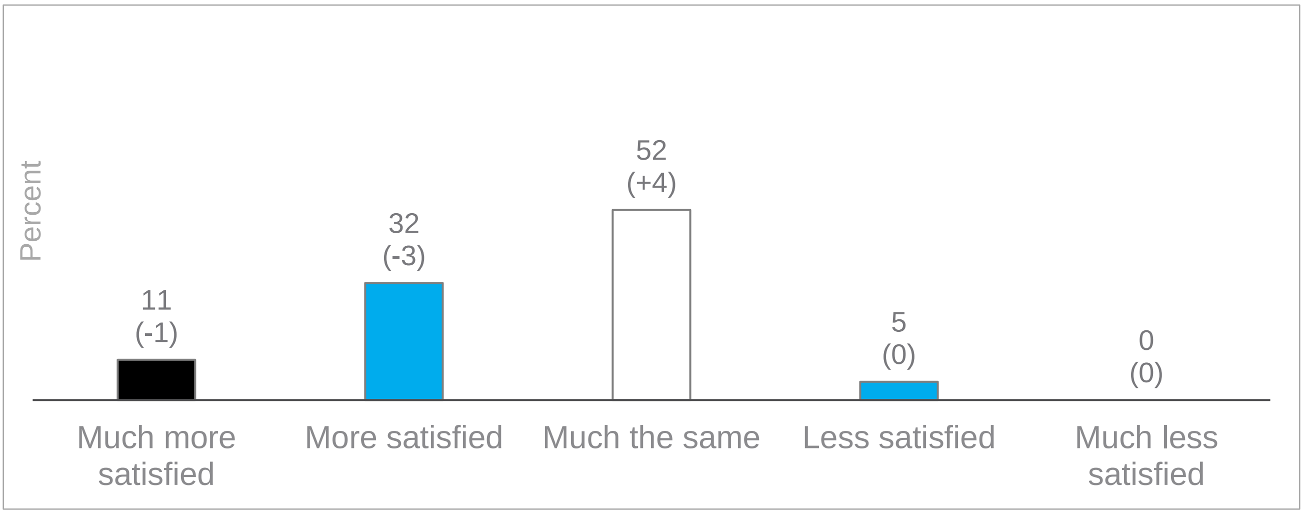
Activity

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 2016 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=231)

Activity

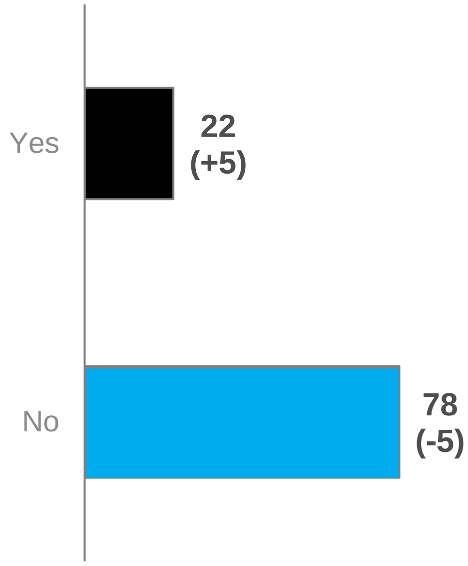
Switching intentions

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

- 22% now think they will change in the year ahead, up 5%.

Future Intentions

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



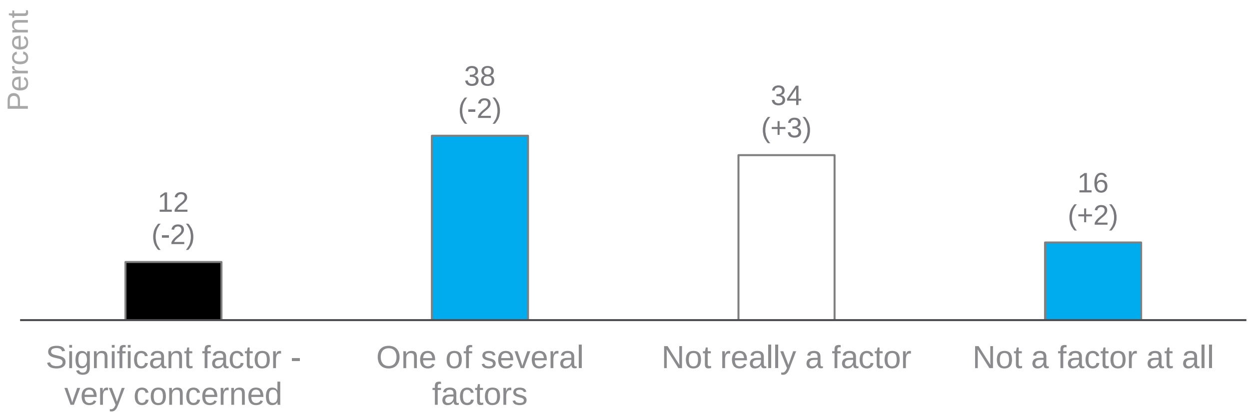
Activity

Consideration of the environment

50% 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 4% below the previous result.

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

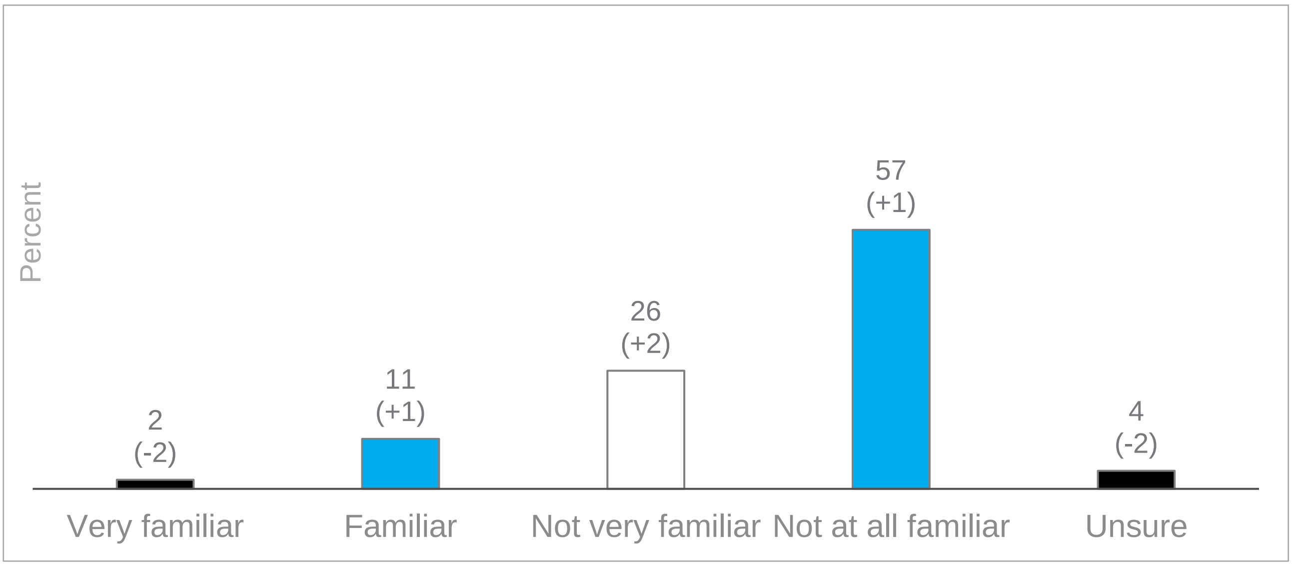


Other

Awareness of ECA

There was no significant change in awareness of Energy Consumers Australia among NSW household consumers.

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



Victoria

Satisfaction

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.

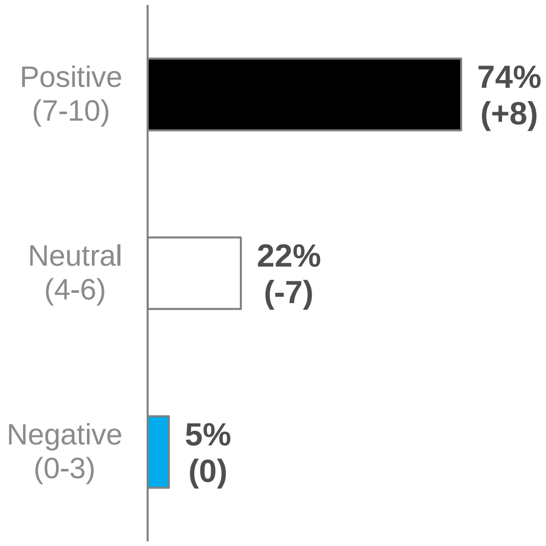
- 74% rate their satisfaction as 7 or higher out of 10, up 8% since last year's survey.
- Just 5% rate their satisfaction as 3 or lower, unchanged from March/April 2016.

Satisfaction towards the level of competition become more polarised.

- 32% were neutral about the level of competition (down 9%), resulting in a 6% increase in the proportion who were positive, and a 4% increase in the proportion who were negative.

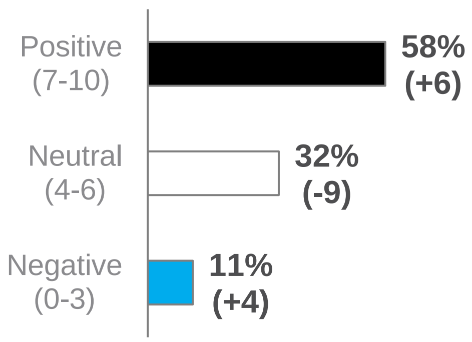
Overall satisfaction

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?



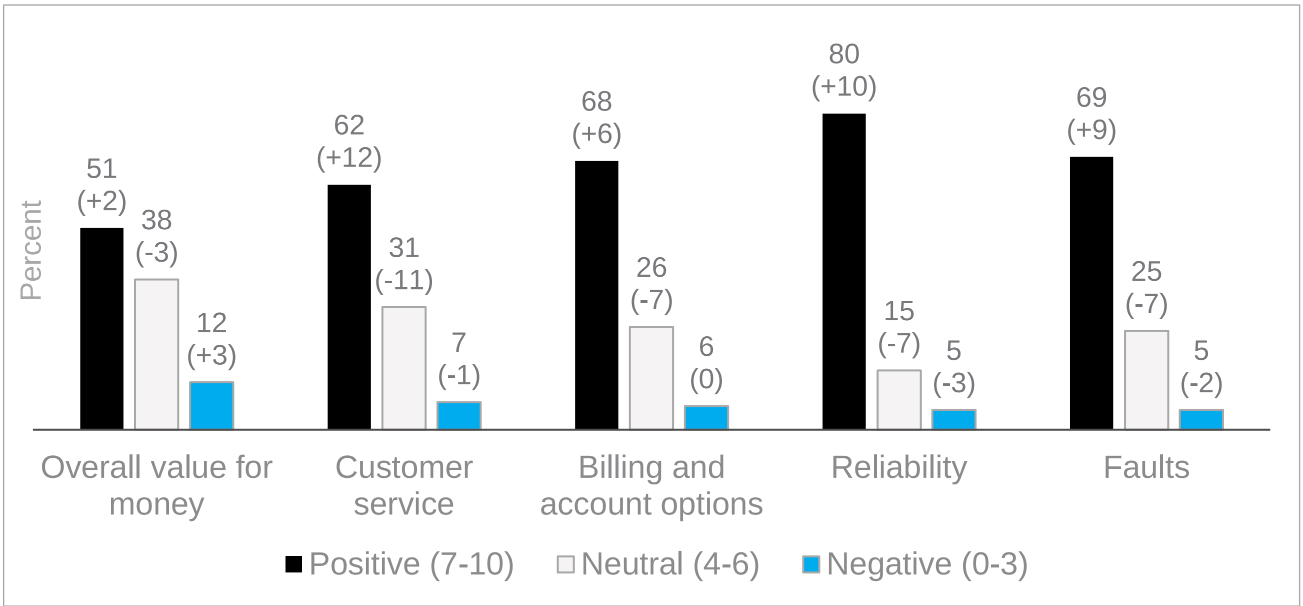
Satisfaction

Satisfaction with electricity

Victorian household consumers in this survey gave higher ratings than those in last year's survey for value for money, reliability and billing.

- 62% are satisfied with their customer service, up 12%.
- 80% are satisfied with their reliability, up 10%.
- 69% are satisfied with their number of faults, up 9%.

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



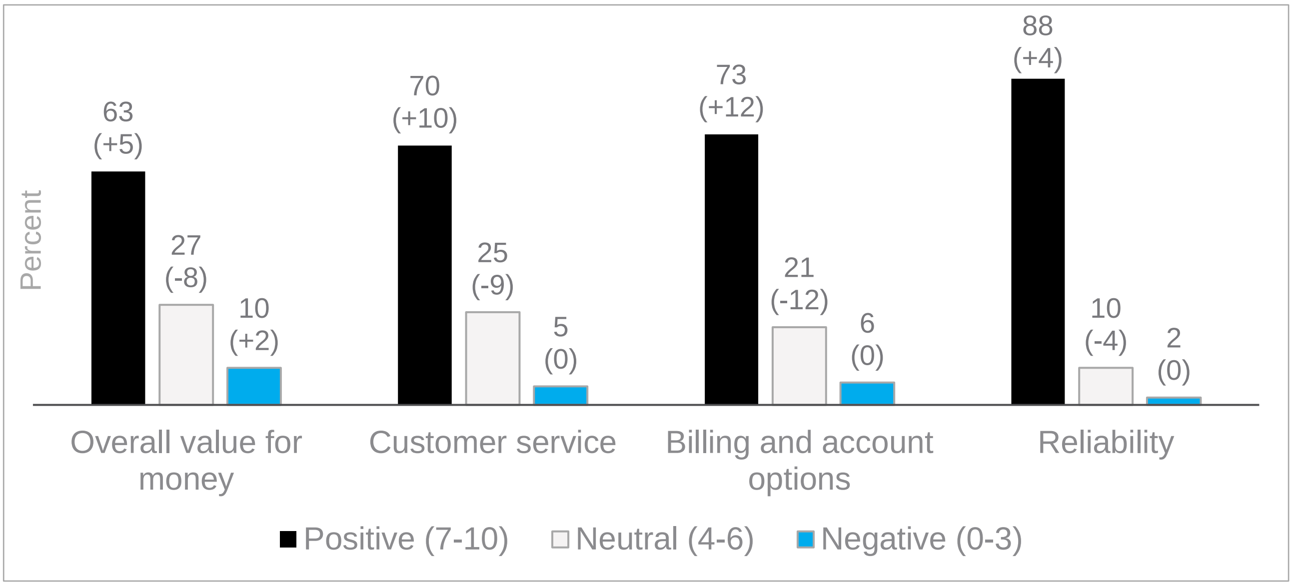
Satisfaction

Satisfaction with gas

As with electricity, Victorian household consumers gave higher ratings than those in last year's survey in all areas.

- 73% are satisfied with their billing and account options for gas, up 12% on the March / April 2016survey.
- 70% are satisfied with the customer service for gas (up 10%)

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

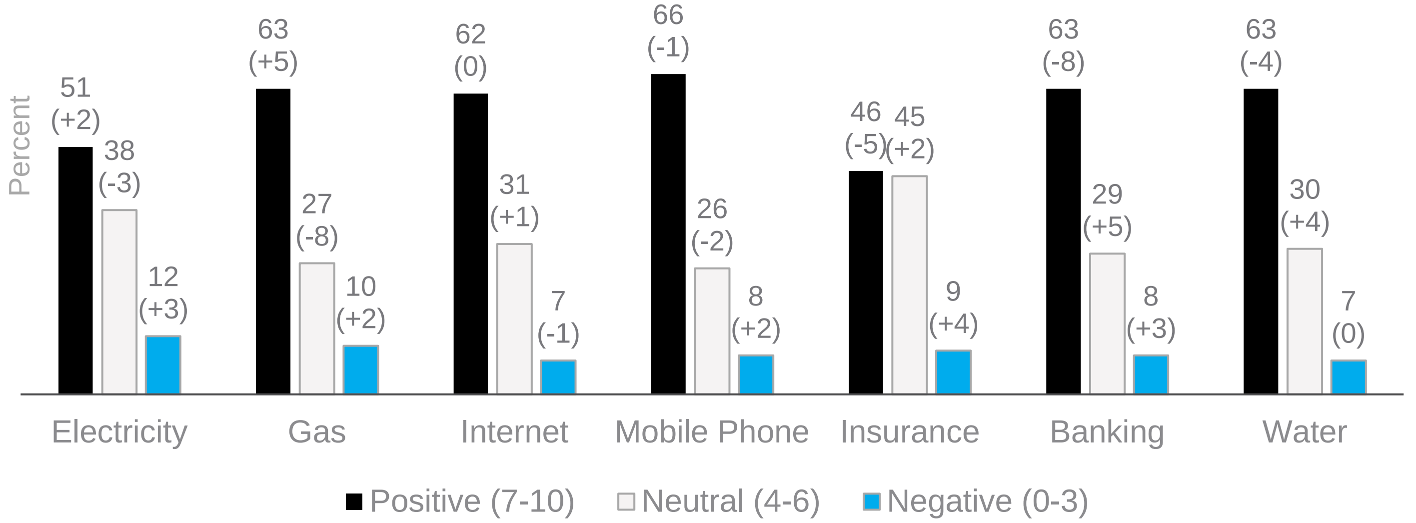


Satisfaction with utilities

While electricity trails most other utility types, value for money for gas is on par with others.

- 51% now say they are satisfied with the value for money of electricity, with only insurance (46%), being lower.
- The 63% satisfaction level with gas places it equal or higher than all other utilities other than mobile phone, which has 66% satisfaction.

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



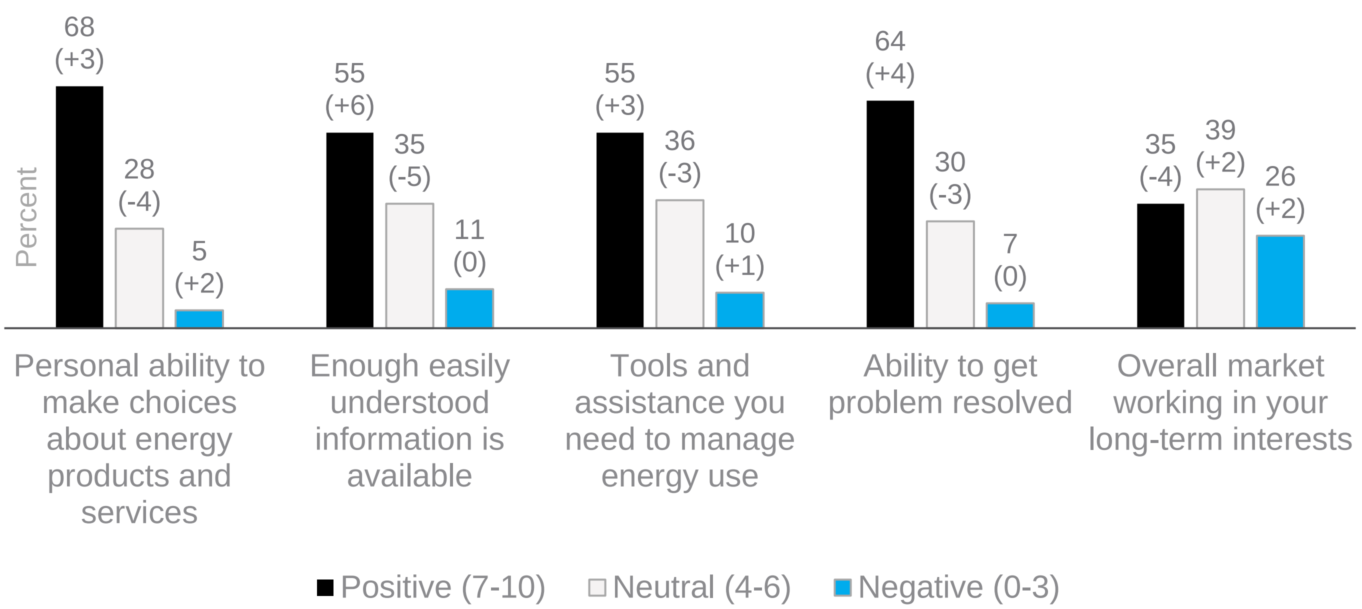
Confidence

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.

- 35% are confident that this is the case, a drop of 4%.
- 55% are however confident in the availability of information (up 6%).

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



Confidence

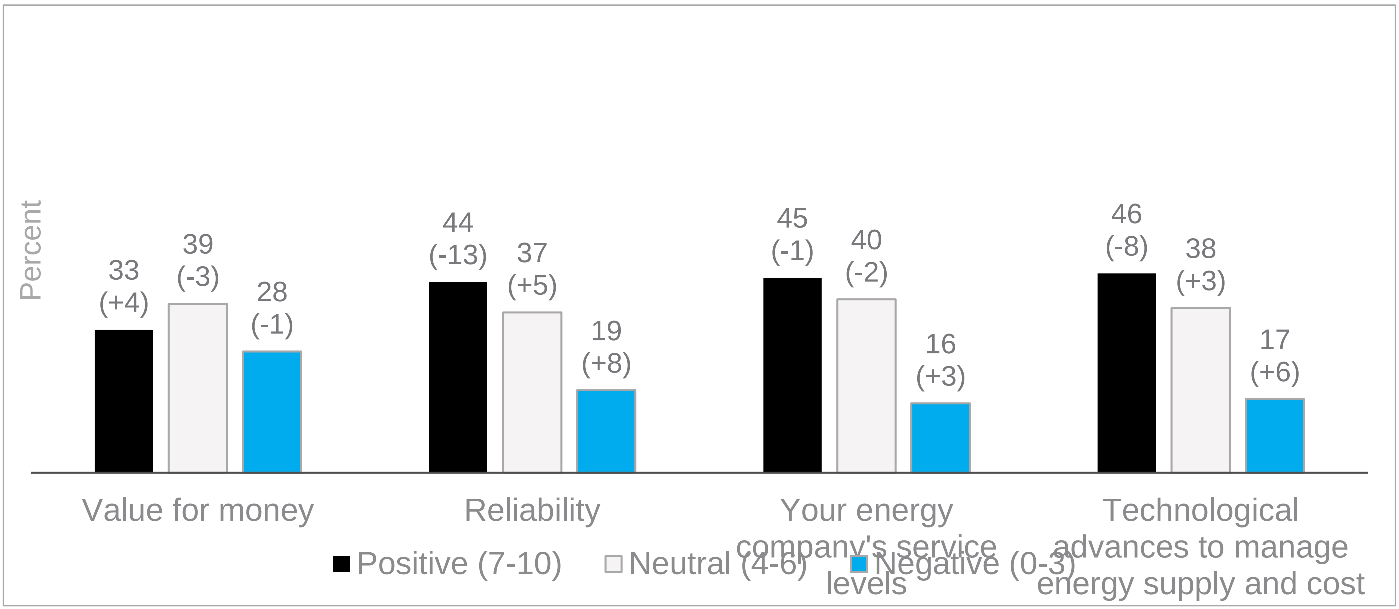
Confidence in long term outcomes

There was a sharp drop in confidence for long term outcomes relating to reliability and technological advances.

- 44% now say that they are confident that the market will deliver better reliability, down 13% since March / April 2016.
- 46% now say that they are confident that the market will deliver technological advances to manage energy supply and costs (down 8%).
- However, there was an increase of 4% to 33% in confidence in long term outcomes for value for money.

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'



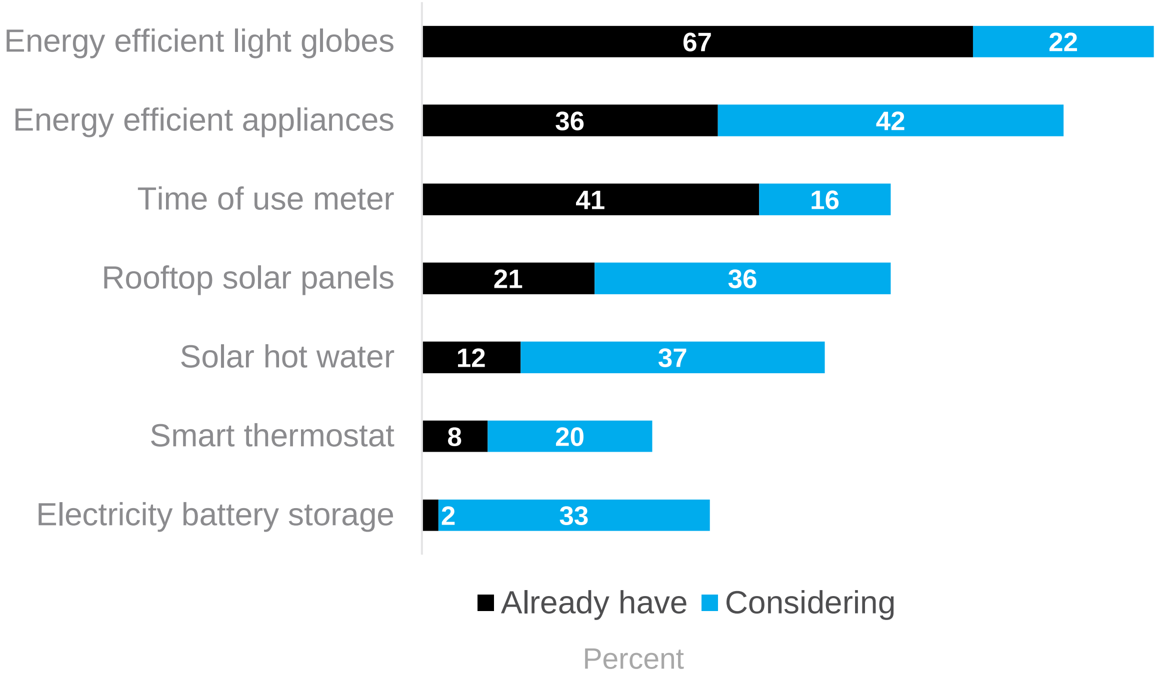
Activity

Uptake of technologies

Victorian household consumers show reasonable interest in both rooftop solar panels and battery storage.

- 36% are thinking about getting rooftop solar, and 33% say they are considering battery storage

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



Activity

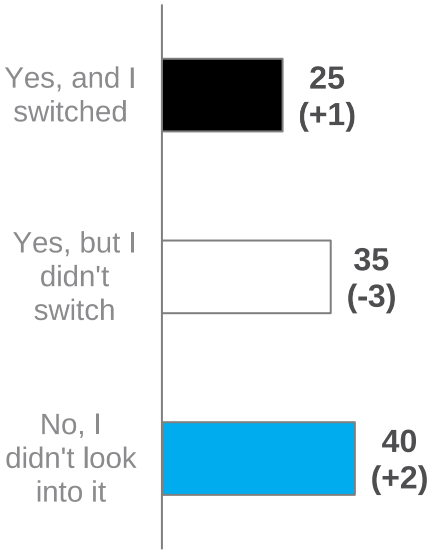
Switching behaviour

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

- 25% report that they have switched (up 1%), while 35% say that they considered switching but did not end up doing 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?"

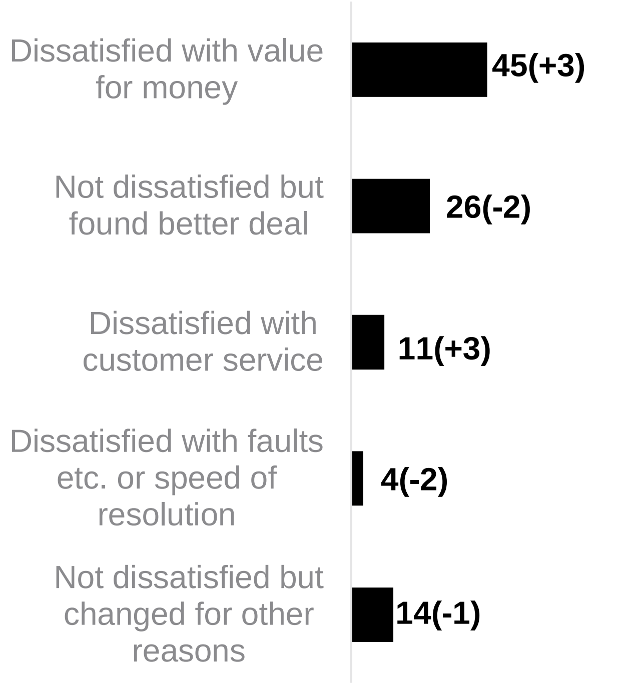


Reasons for considering switching

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

- 45% say they were dissatisfied with the value for money (up 3%), and 26% say that were not dissatisfied but had found a better deal elsewhere (down 2%).

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



Base: Victorian household consumers who considered switching in the last 3 years (n=239)

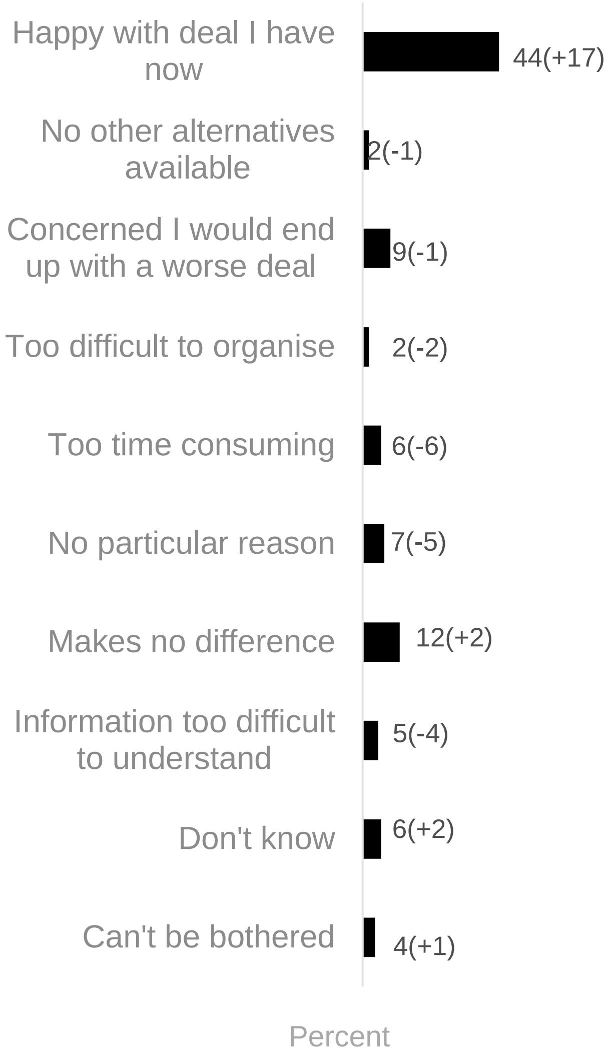
Activity

Reasons for not switching

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

- 44% say that this was the main reason, up 17% since last year's survey.
- 6% say that they had not looked at switching because it was too time-consuming (down 6%).

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=161)

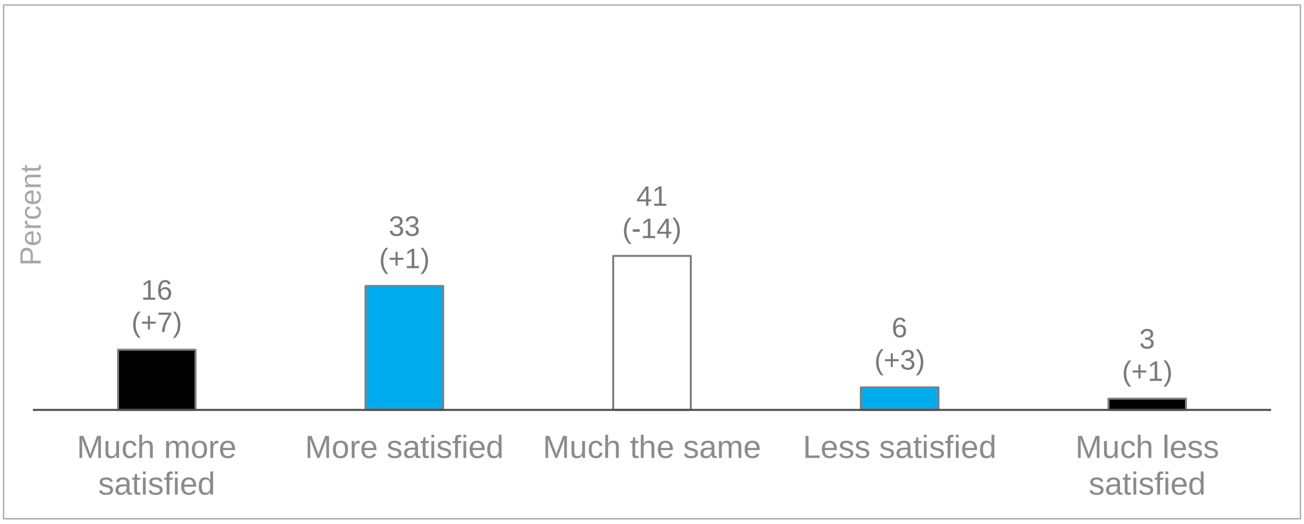
Activity

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.

- 49% now say that it made them more satisfied, up 8% since the March / April 2016 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=239)

Activity

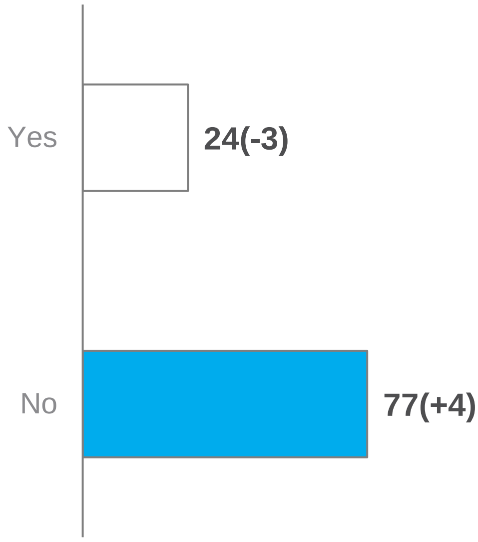
Switching intentions

24% of Victorian household consumers in this survey say they are likely to change energy companies or plans in the year ahead.

- This is 3% below the March / April 2016 result.

Future Intentions

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



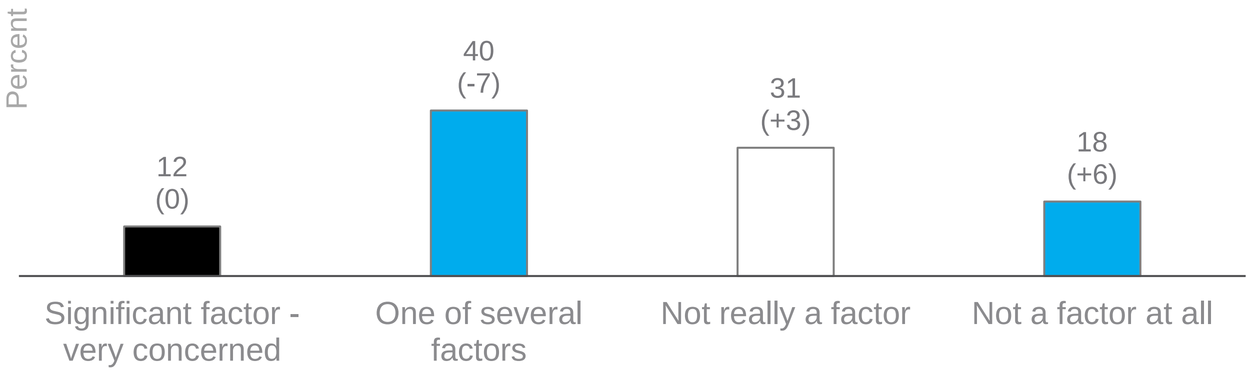
Activity

Consideration of the environment

52% 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 7% since last year's survey.

- 40% report that it is one of several factors they consider, down 7%.
- 18% report that it is not a factor at all, up 6%.

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



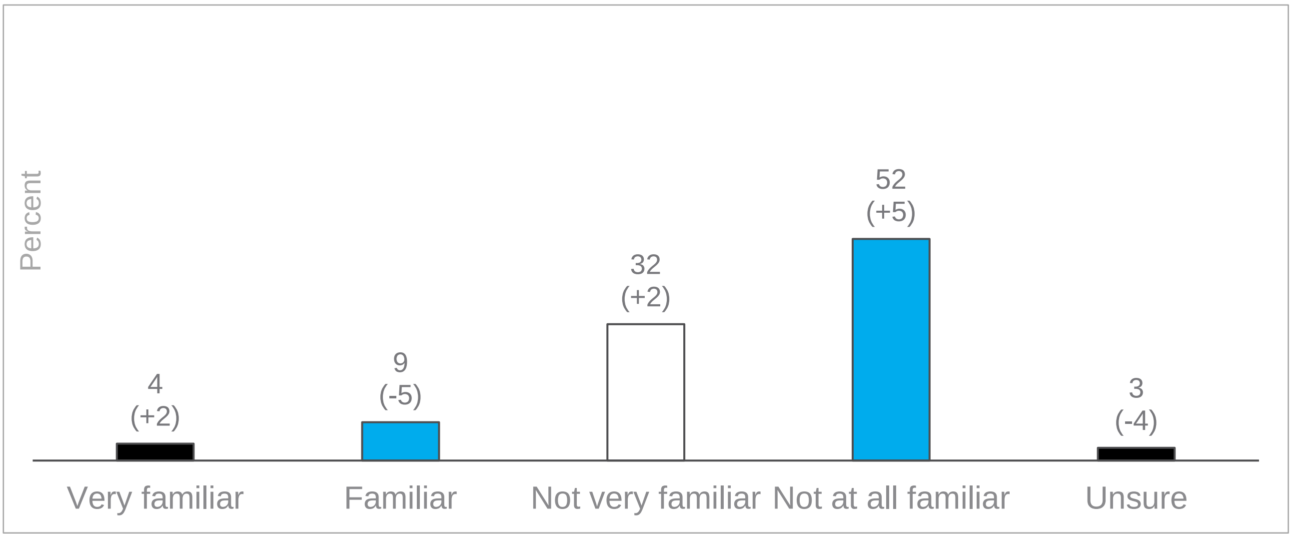
Other

Awareness of ECA

There was a slight decrease in declared awareness of Energy Consumers Australia among Victoria household consumers

- 13% now claim to be familiar, a drop of 3% since this time last year.

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



Queensland

Overall satisfaction

The proportion of Queensland household consumers satisfied with the provision of electricity and gas services overall has not changed significantly since this time last year.

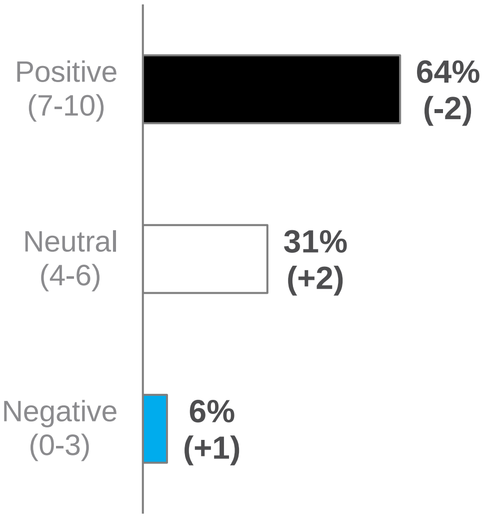
- 64% rate their satisfaction as 7 or higher out of 10, down 2% since this time last year.

Satisfaction with levels of competition has become more polarised.

- 30% now say they are neutral regarding the level of competition in their area, a drop of 10%.
- The proportion giving positive ratings is up 6% to 43%.
- The proportion giving negative ratings is up 4% to 27%.

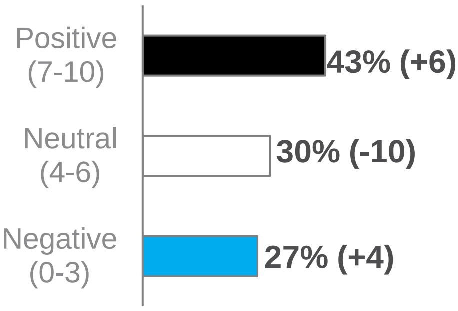
Overall satisfaction

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?



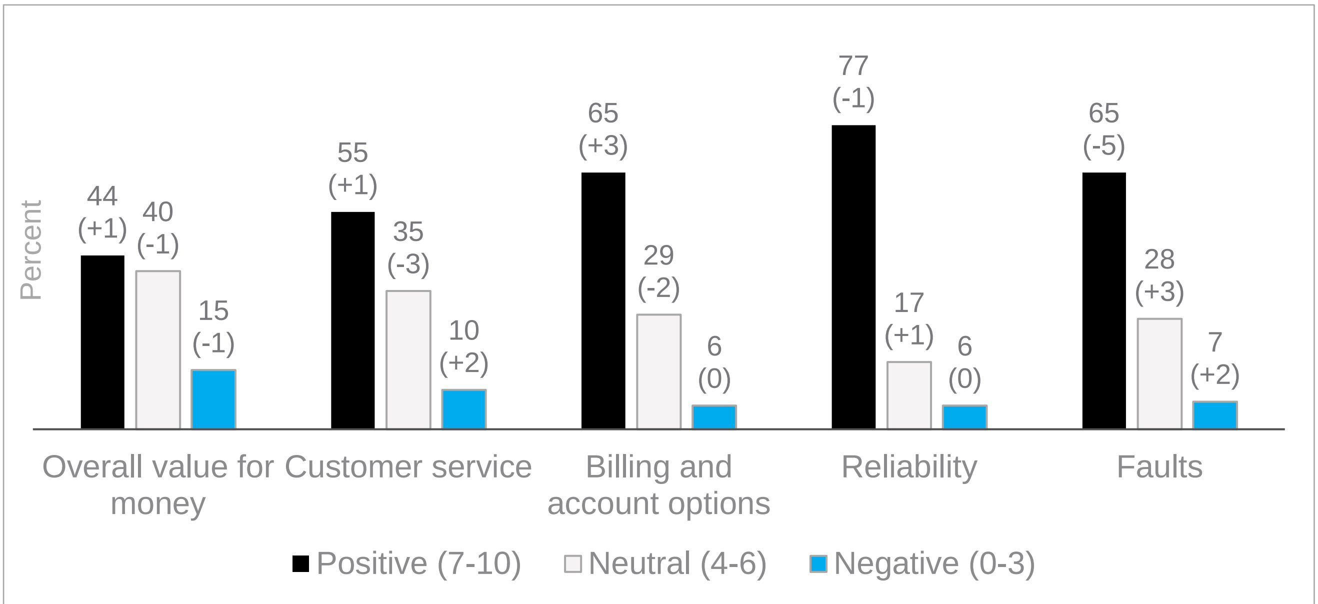
Satisfaction

Satisfaction with electricity

Queensland household consumers in this survey gave lower ratings than those in the previous survey for satisfaction with the number of faults, but other measures did not change substantially.

- 65% now say they are satisfied with the way faults have been managed, down 5% since the March / April 2016 survey.

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



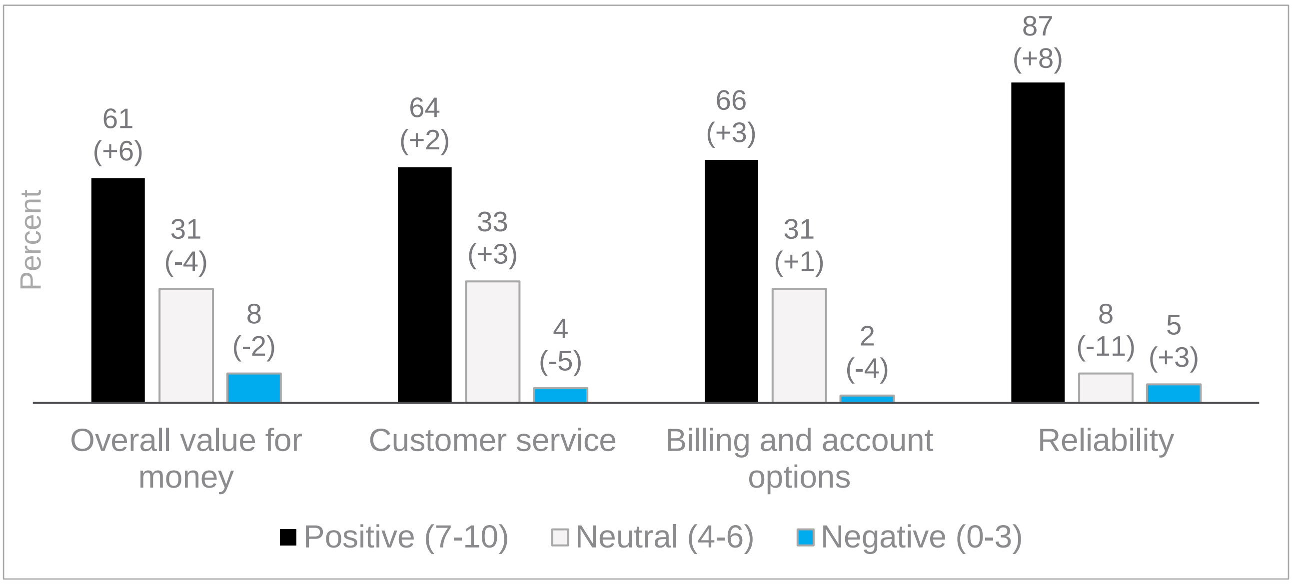
Satisfaction

Satisfaction with gas

Queensland household consumers in this survey gave higher ratings than those in than a year ago for all aspects of gas.

- 87% now say that they are satisfied with the reliability of their gas, up 8% from a year ago.
- 61% say that they are satisfied with their overall value for money, up 6%.

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

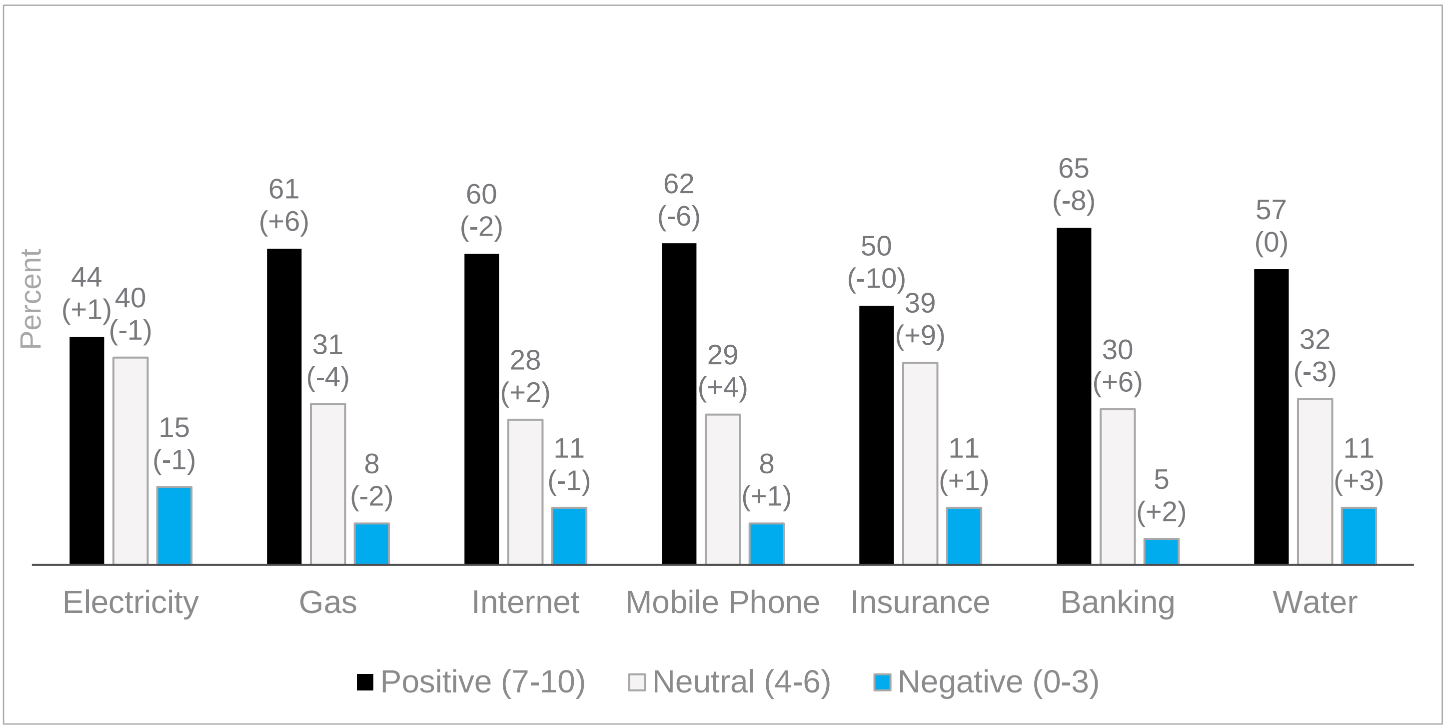


Satisfaction with utilities

Large declines in satisfaction for other utility types has closed the gap between them and electricity and gas..

- 44% satisfaction with value for money for electricity is still the lowest out of all utilities
- 61% satisfaction with value for money for gas now places it behind only mobile phone (62%) and banking (65%).

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



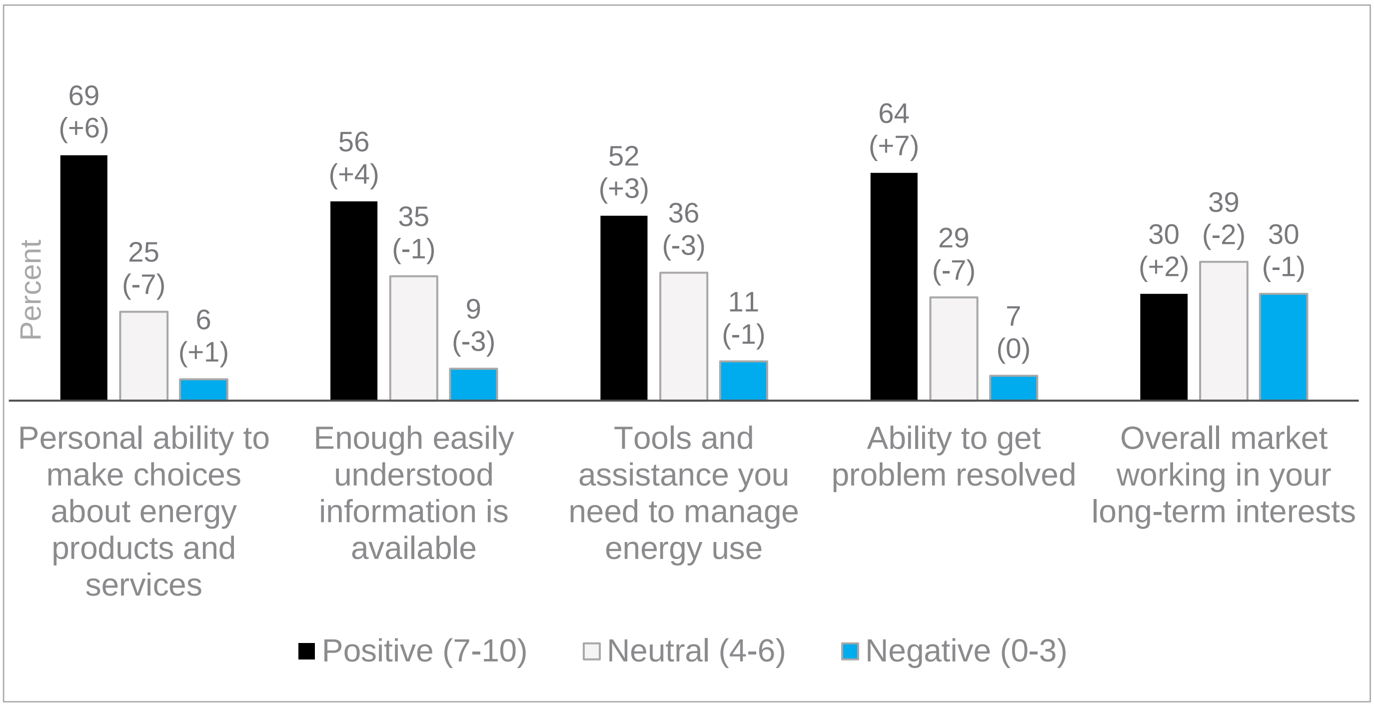
Confidence

Confidence in information and tools

Queensland household consumers in this survey are more confident than those in last year's survey across all areas.

- 64% now say they are confident in their ability to get problems resolved, up 7% from this time last year.
- 69% now say they are confident in their personal ability to make choices about energy products and services (up 6%).

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



Confidence

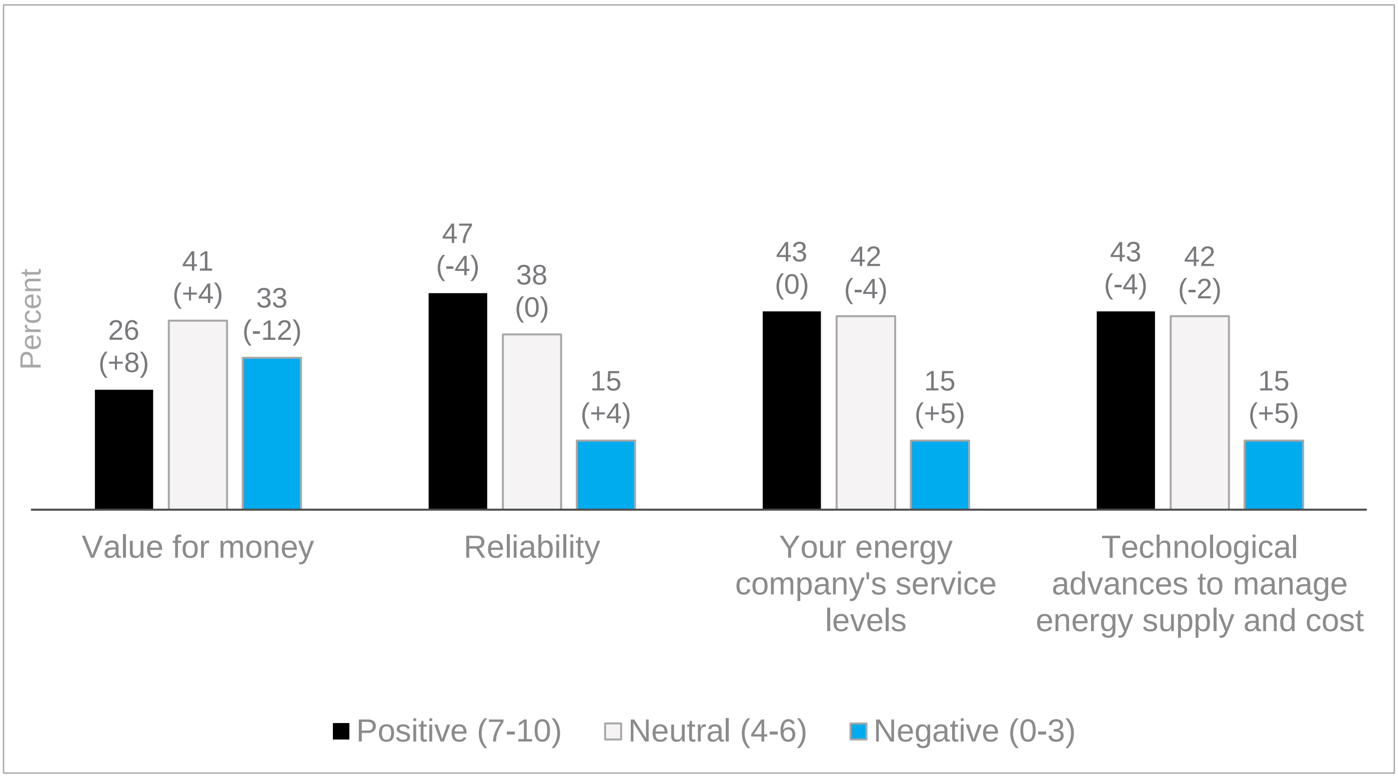
Confidence in long term outcomes

Confidence in long term outcomes for value for money has increased, but confidence for reliability and technological advances has decreased

- The proportion of Queensland household consumers saying they are confident of better outcomes for value for money is up 8% to 26%.
- However, confidence in reliability is down 4% to 47%, and confidence in technological advances is down 4% to 43%.

"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'



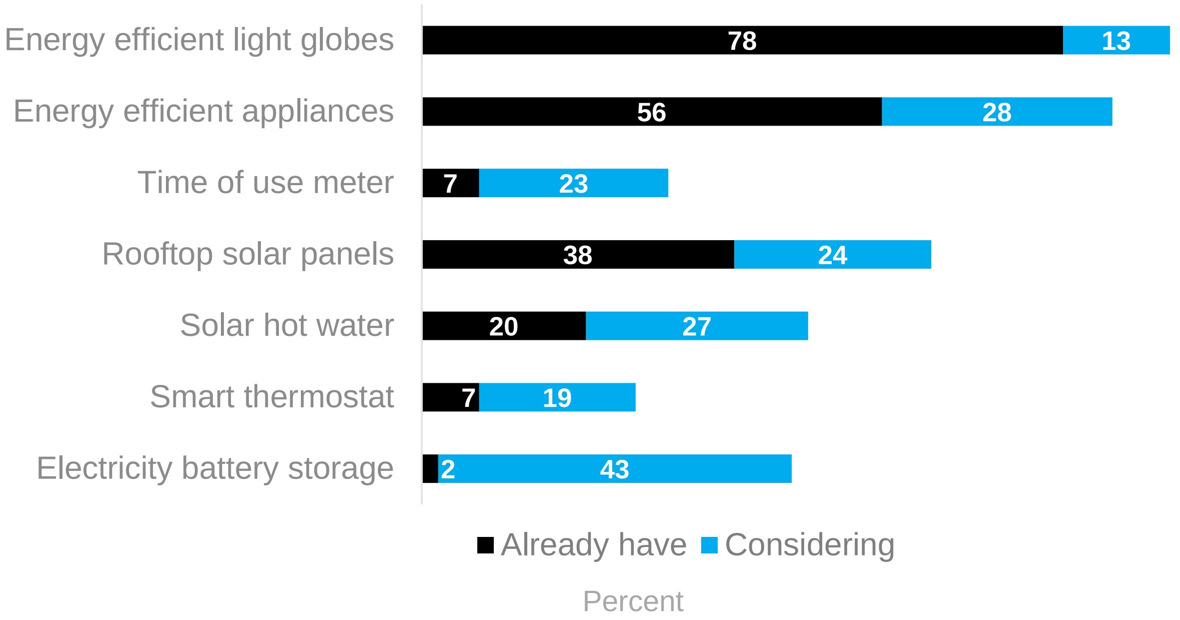
Activity

Uptake of technology

Uptake of rooftop solar panels is relatively high in Queensland, and this has probably contributed to a relatively high proportion saying they are considering battery storage.

- 43% report that they are considering battery storage.

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

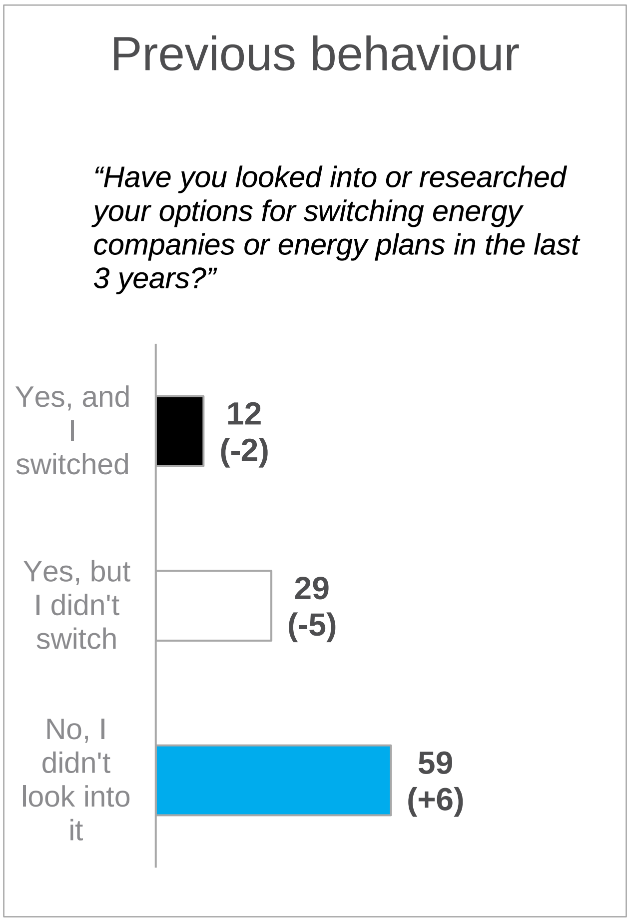


Activity

Consideration of switching

The proportion of Queenslanders who report looking into switching in the last three years has dropped.

- 59% say that they have not looked into switching (down 6%), those who looked but didn't switch is down 5% to 29%, and this who looked and switched is down 2% to 12%.



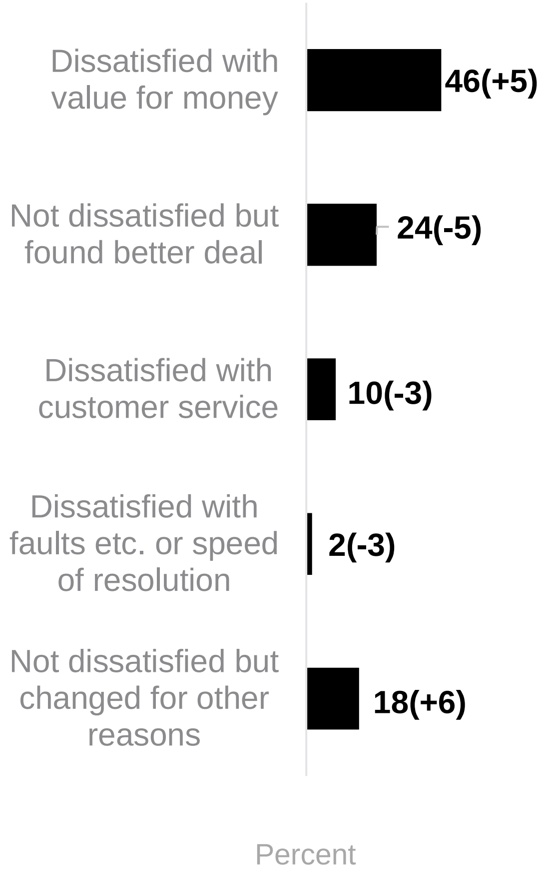
Activity

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.

- 46% say that they considered switching because they were dissatisfied with value for money (up 5%).
- 24% say that they were not dissatisfied but found a better deal elsewhere (down 5%).

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



Base: Queensland household consumers who considered switching in the last 3 years (n=124)

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.

- 23% said that they had not looked at switching because there were no other alternatives available (up 8%).
- 32% said they are satisfied with the deal they have now (up 7%).
- 5% said that there is no particular reason, down 6%.

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=176)

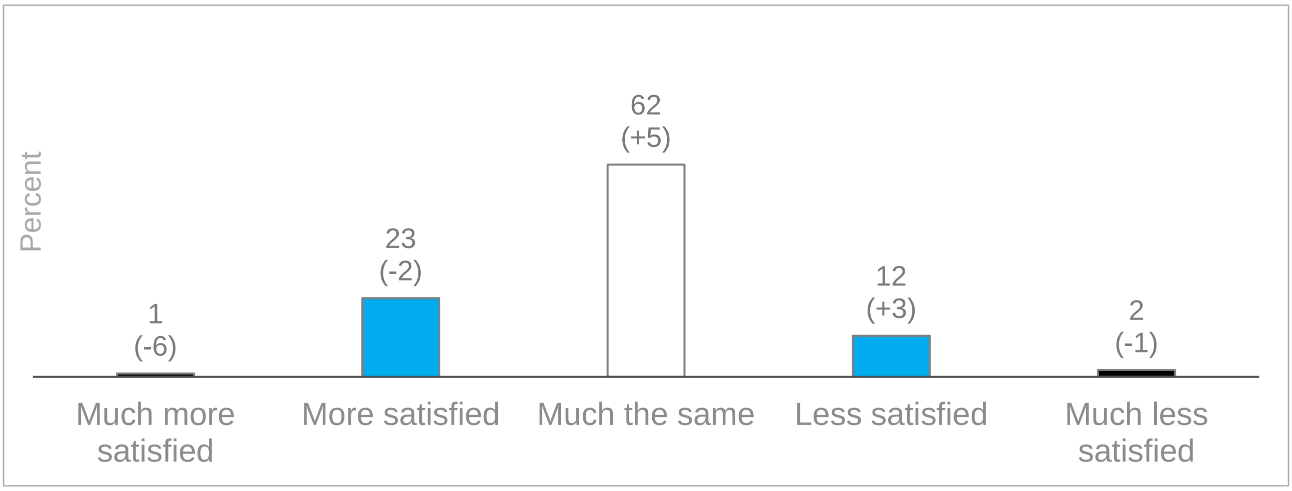
Activity

Satisfaction after considering switching

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

- 24% of Queensland household consumers in this survey who considered switching say that doing so made them more satisfied, down 8% since the March / April 2016 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?"



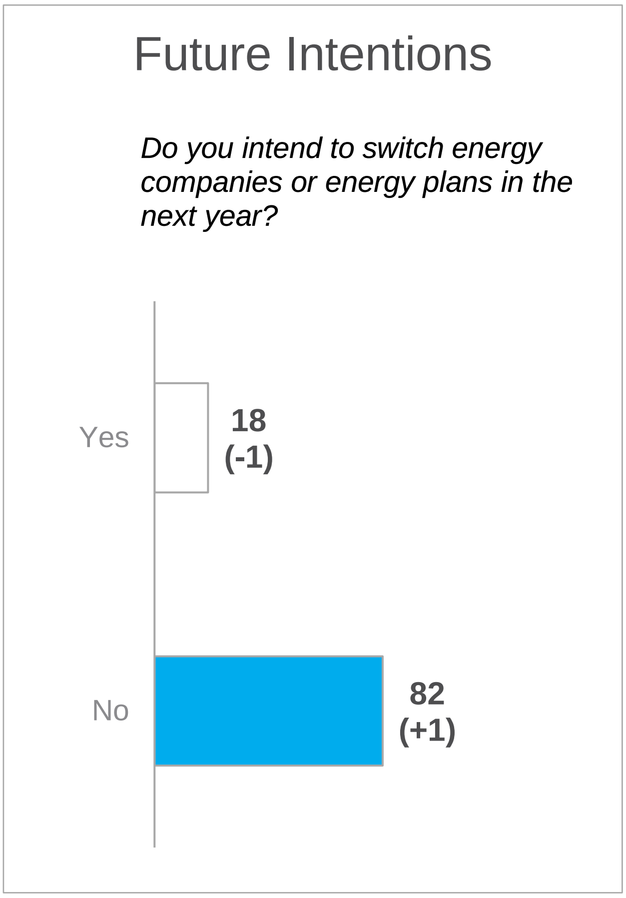
Base: Queensland household consumers who considered switching in the last 3 years (n=124)

Activity

Switching intentions

There was little change in Queensland household consumers' intention to switch in the year ahead.

- 18% say that they intend to do so, down 1% since last year's survey.



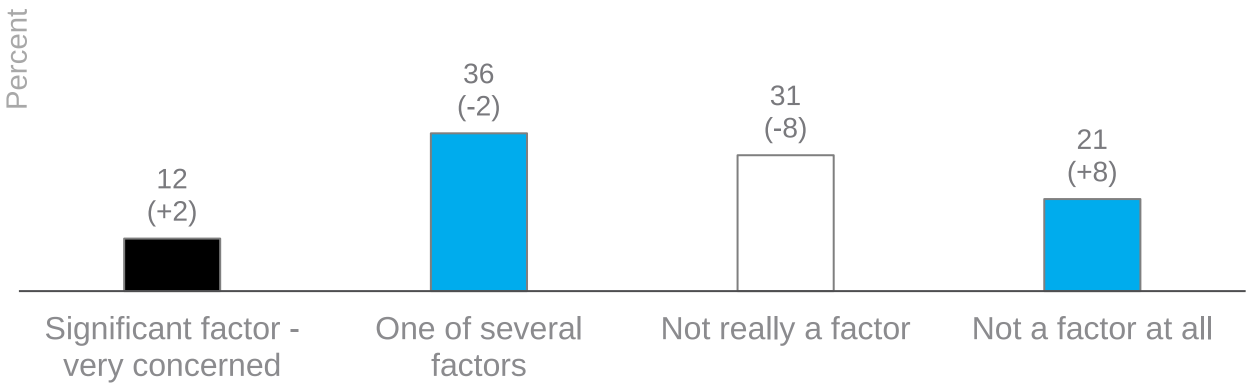
Activity

Consideration of the environment

There was no overall change among Queensland household consumers in their consideration of the environment in decisions about energy products and services.

- 12% now say it is a very significant factor (up 2%) and 36% claim that it is one of several factors they consider (down 2%).

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



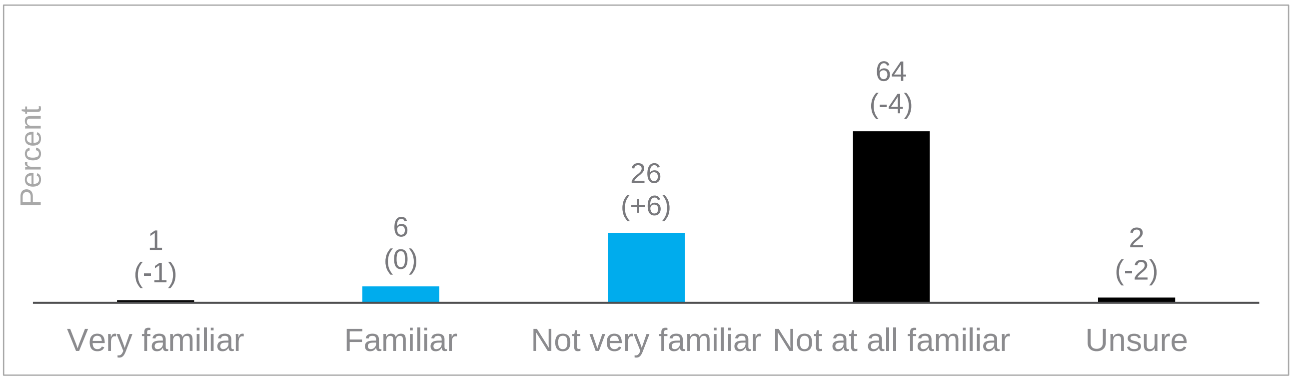
Other

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 7% say that they are very familiar or familiar with Energy Consumers Australia, almost the same as in last year's 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.

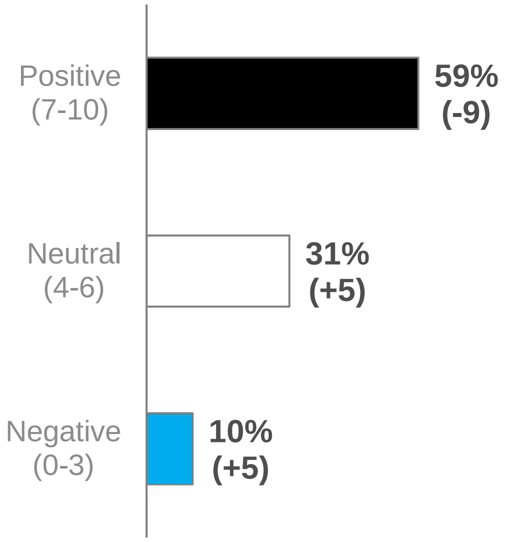
- 59% rate their satisfaction as 7 or higher out of 10, down 9% on last year's survey.
- This was the first fieldwork conducted since the statewide power cuts of late September 2016.

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

- The proportion with negative views about energy market competition increased 10% to 19%.
- This was reflected in the proportion of positive ratings, which dropped 2% to 46%, and neutral ratings, which dropped 8% to 35%.

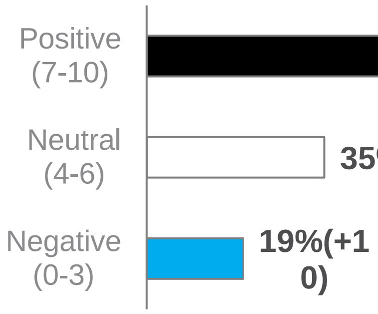
Overall satisfaction

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?



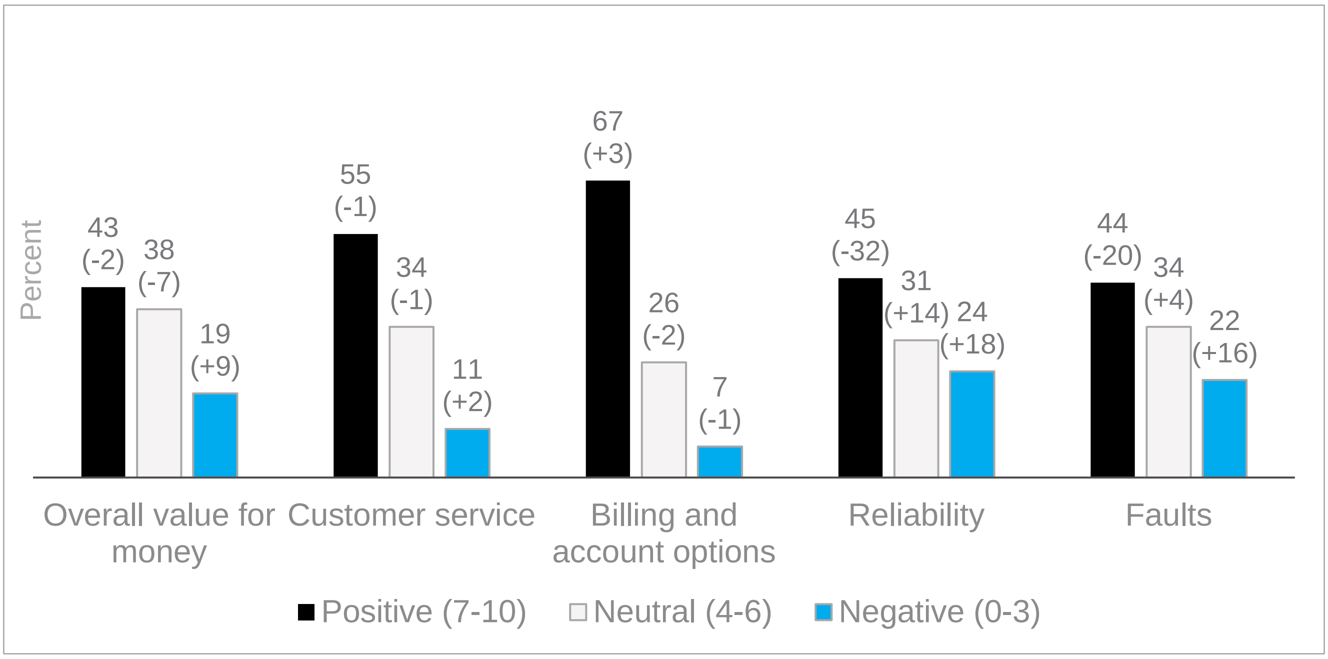
Satisfaction

Satisfaction with electricity

Satisfaction with the reliability of electricity is down substantially.

- 45% are now satisfied with the reliability of their electricity services, down 32% since March / April 2016.
- Comparing results from Wave 1 (March / April 2016), Wave 2 (August / September 2016 – before the September blackout event) and Wave 3 (March / April 2017) shows that although the more recent events in South Australia have contributed to the decline, they are not the only cause. Satisfaction with reliability fell 8% between Wave 1 and Wave 2, and 24% between Wave 2 and Wave 3.

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



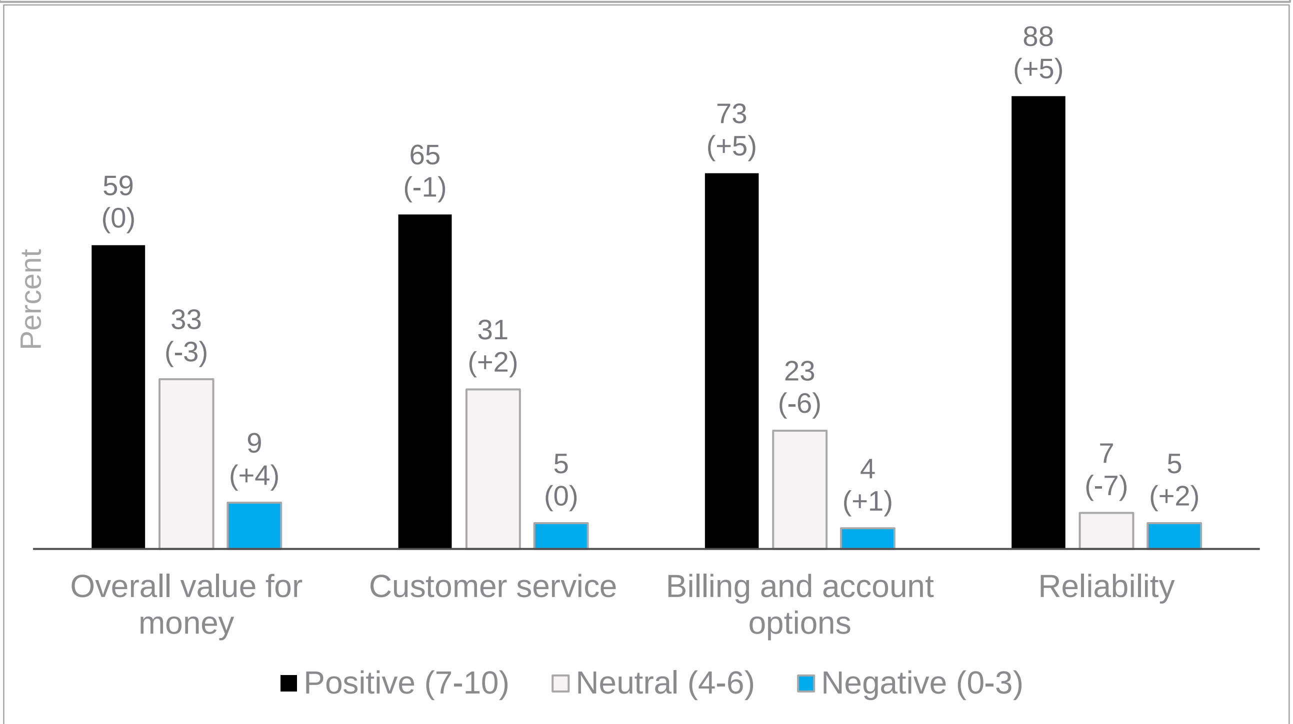
Satisfaction

Satisfaction with gas

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

- 88% of South Australian household consumers who have gas are satisfied with the reliability of gas services, up 5% on the March / April 2016 survey.
- 73% of South Australian household consumers who have gas are satisfied with their billing and account options, up 5% on the March / April 2016 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'



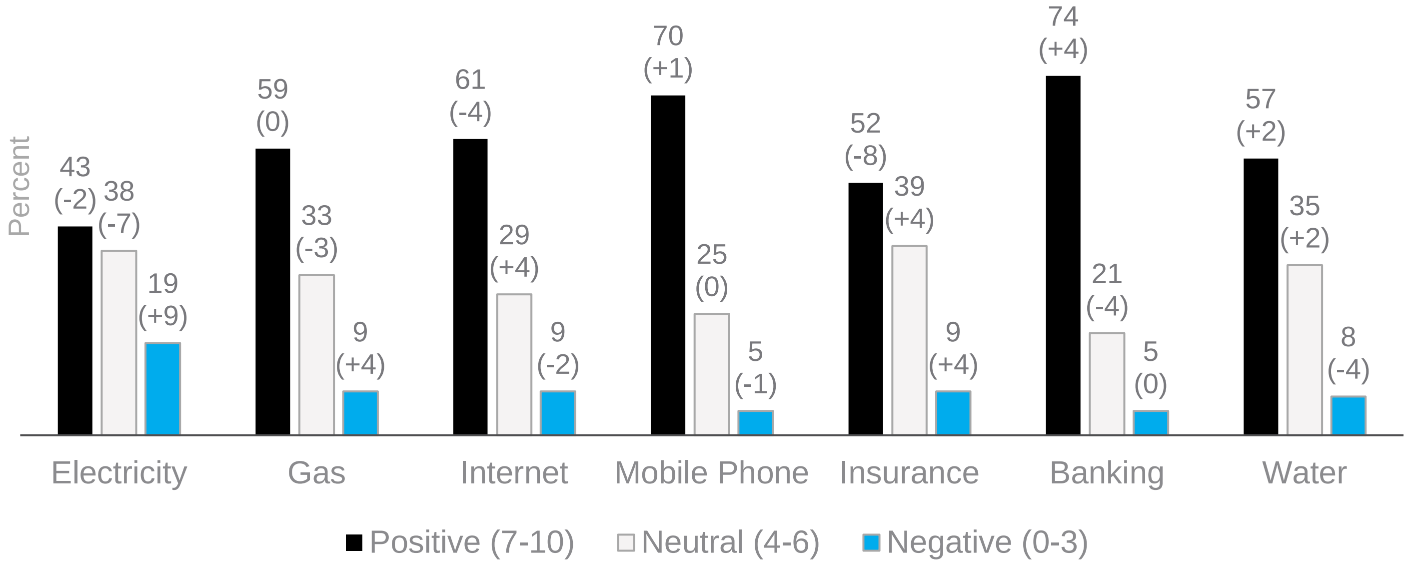
Satisfaction

Satisfaction with utilities

South Australian household consumers in this survey are less likely than those in last year's survey to rate the value for money of insurance positively, the electricity is still the least likely to be considered good value for money.

- 52% now rate the value for money of insurance positively, down 8% on last year's survey.
- With 43% positive, electricity is considered good value for money by the lowest proportion of South Australians.

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



Confidence

Confidence in information and tools

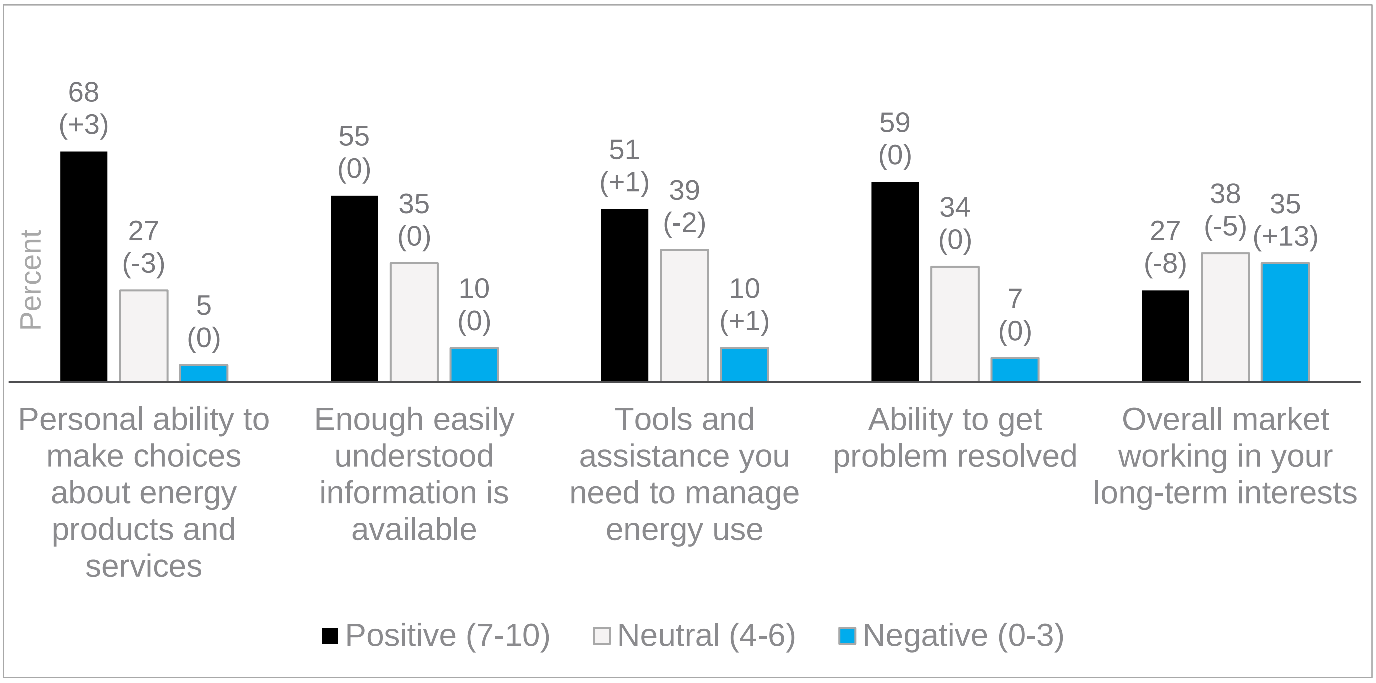
The proportion of South Australian household consumers saying they are confident in the overall market working in their long-term interests is lower in this survey.

- 27% are confident in this, an 8% decrease.

There is, however, an increase in the proportion saying that they are confident in their personal ability to make choices about energy..

- 68% are confident in this ability, up 3% since last year's survey.

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



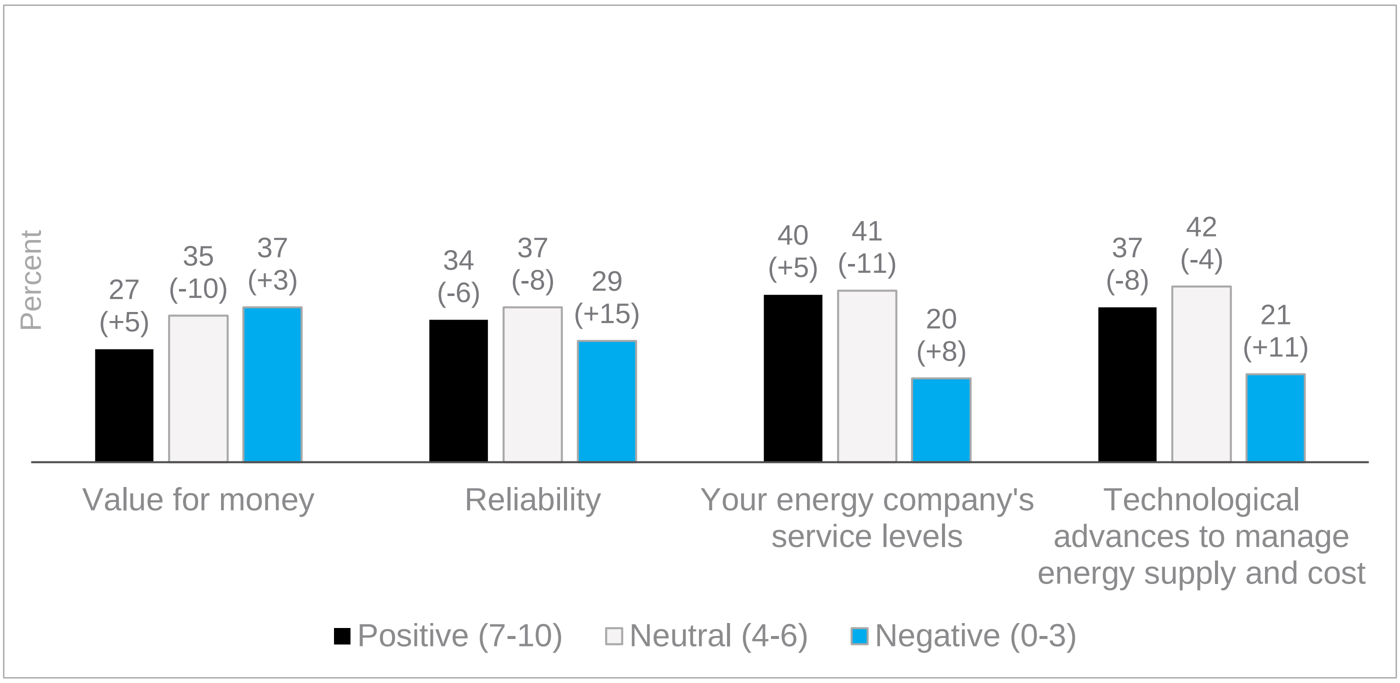
Confidence in long term outcomes

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 value for money and better service levels in the long term, but less likely to think it will provide better reliability or technological advances to manage supply and cost.

- 40% now say they are confident in better outcomes in terms of customer service, up 5% since last year's survey, and 27% are confident it will provide better value for money, also up 5%.
- 34% are confident that the market will provide better outcomes for reliability, down 6%, and 37% are confident in will provide technological advances (down 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'



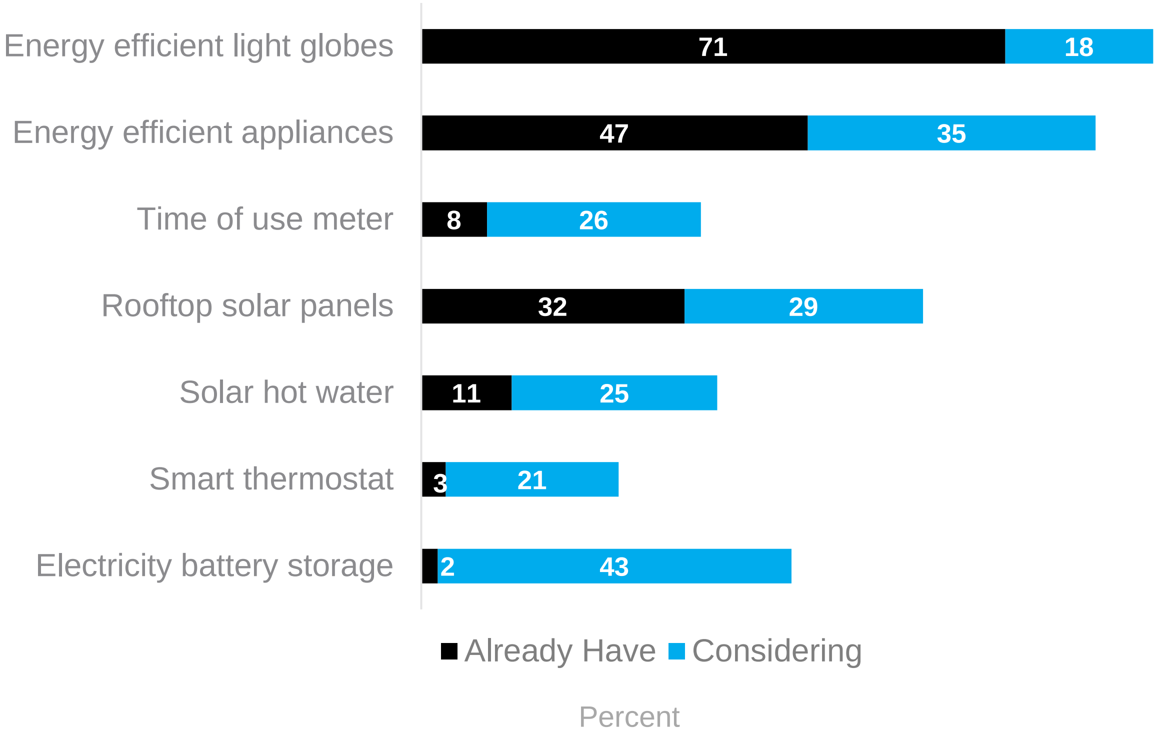
Activity

Uptake of technologies

Like in Queensland, uptake of rooftop solar panels is relatively high in South Australia, and this has probably contributed to a larger proportion of household consumers saying they are considering electricity battery storage.

- 43% now say they are considering battery storage.

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



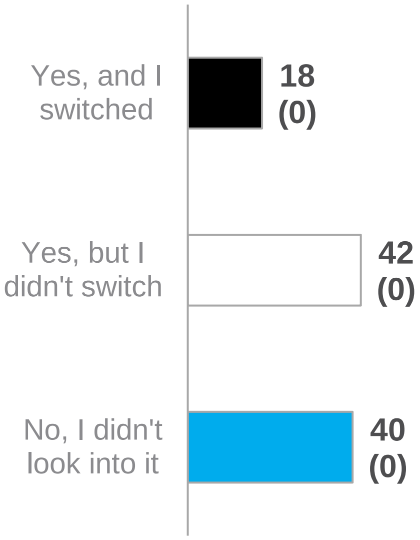
Activity

Switching behaviour

There was no change in the proportion of South Australians who looked into switching since this time last year.

Previous behaviour

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



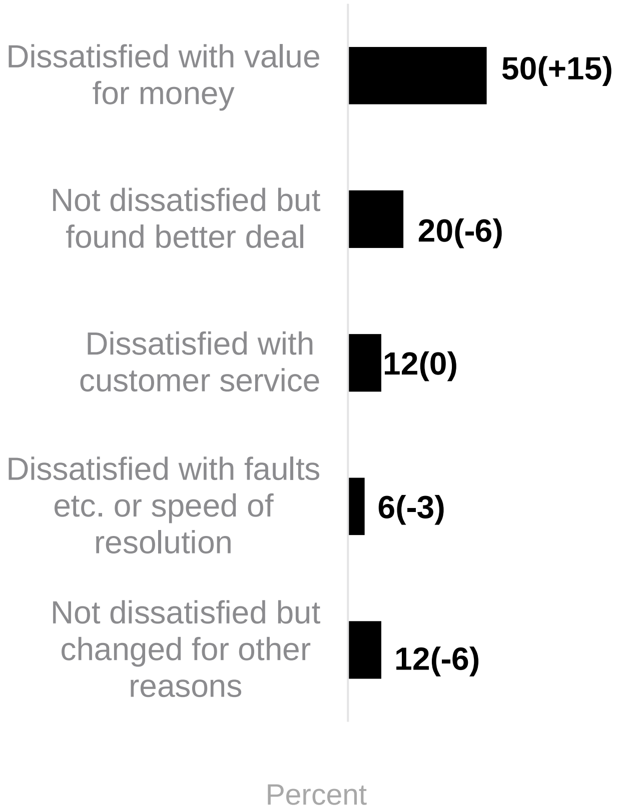
Activity

Reasons for switching

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

- 50% of those who looked at switching say this was because they were dissatisfied with the value for money they were getting, up 15% on last year's 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=181)

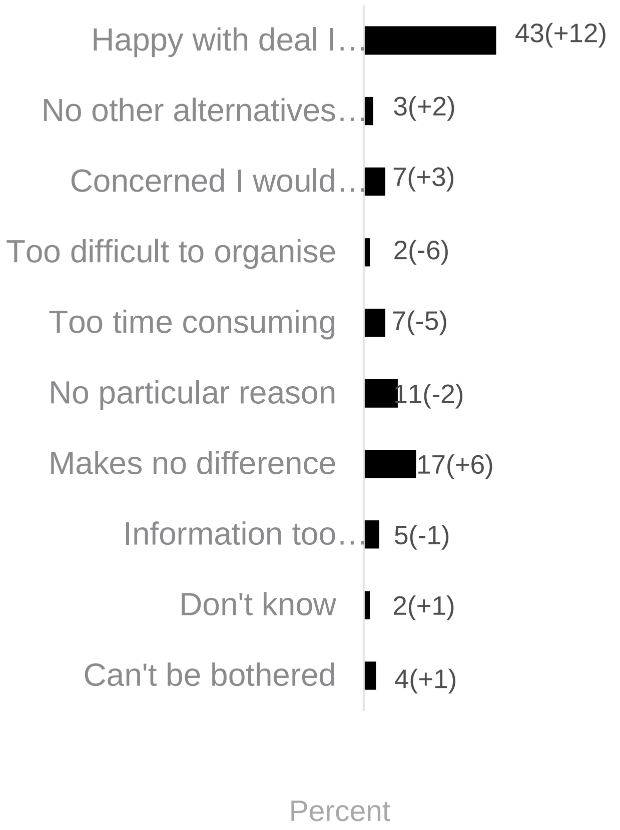
Activity

Reasons for not switching

Those who have not considered switching have become 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.

- 45% cite satisfaction with the deal they have now as the main reason for not considering switching, up 12% on last year's survey.
- 20% say that they had not looked at switching because there were no other alternatives available or that it made no difference (up 8%).
- 14% say that the barriers are too high (too difficult, too time consuming or too difficult to understand), down 12%.

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=119)

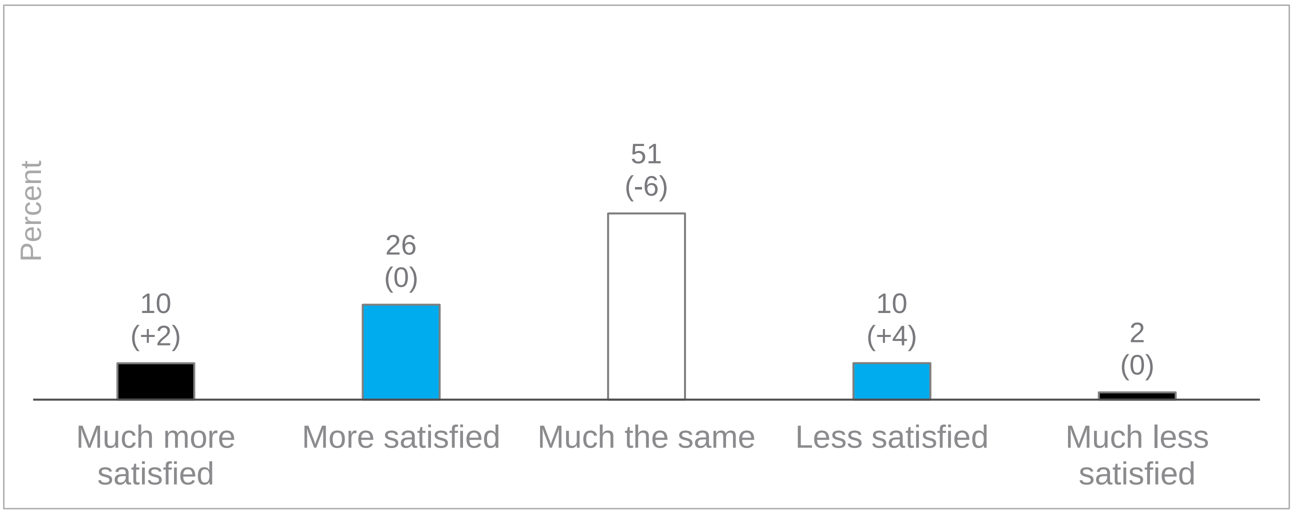
Activity

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 last year's survey.

- 36% now say that looking made them more satisfied, up 2% on this time last year.

"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=181)

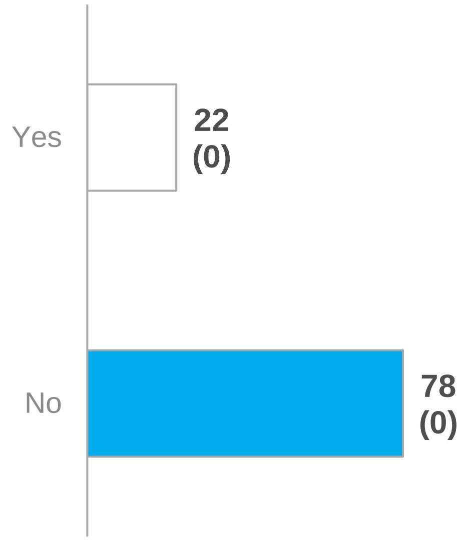
Activity

Switching intentions

There was no change in the proportion of South Australian household consumers who say they intend to switch energy companies or plans in the year ahead.

Future Intentions

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



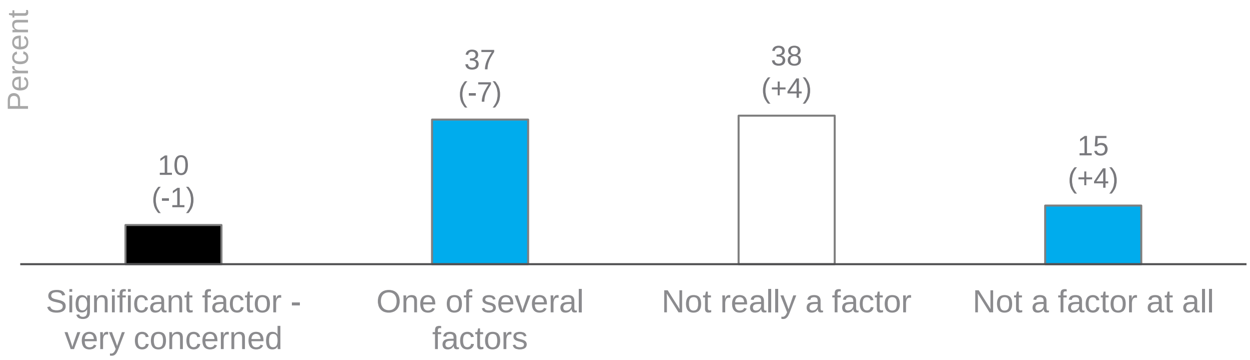
Activity

Consideration of the environment

47% 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.

- 10% say that it is one of the most important factors (down 1%), while 37% consider it to be one of several factors (down 7%).

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



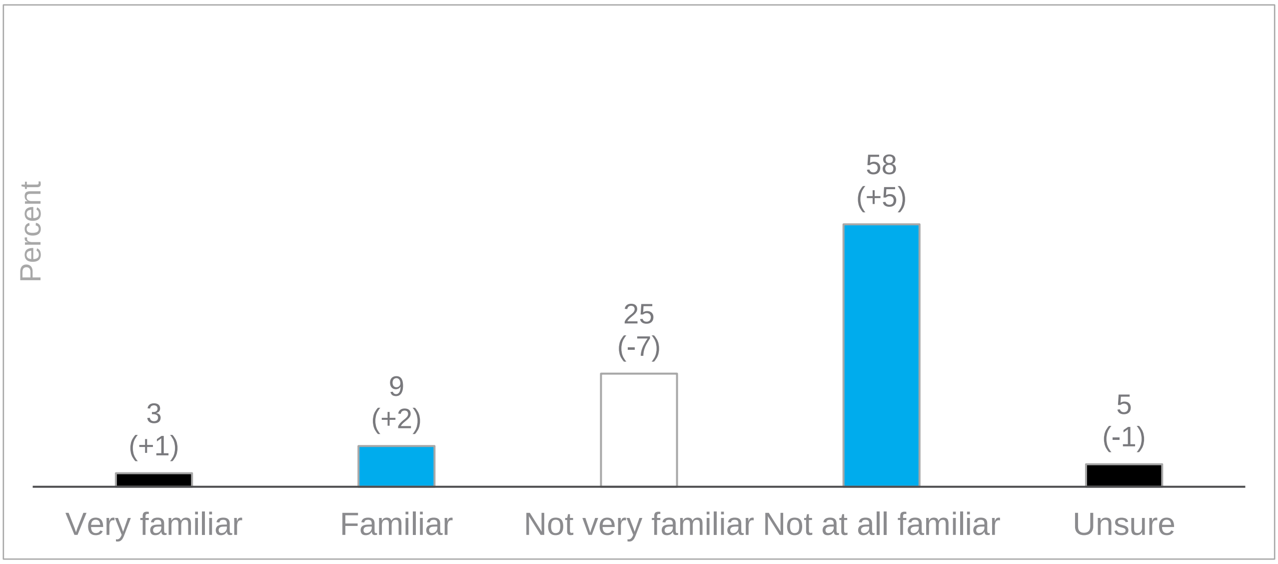
Other

Awareness of ECA

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

- 12% now claim to be very familiar or familiar with Energy Consumers Australia, up 3% on this time last year.

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



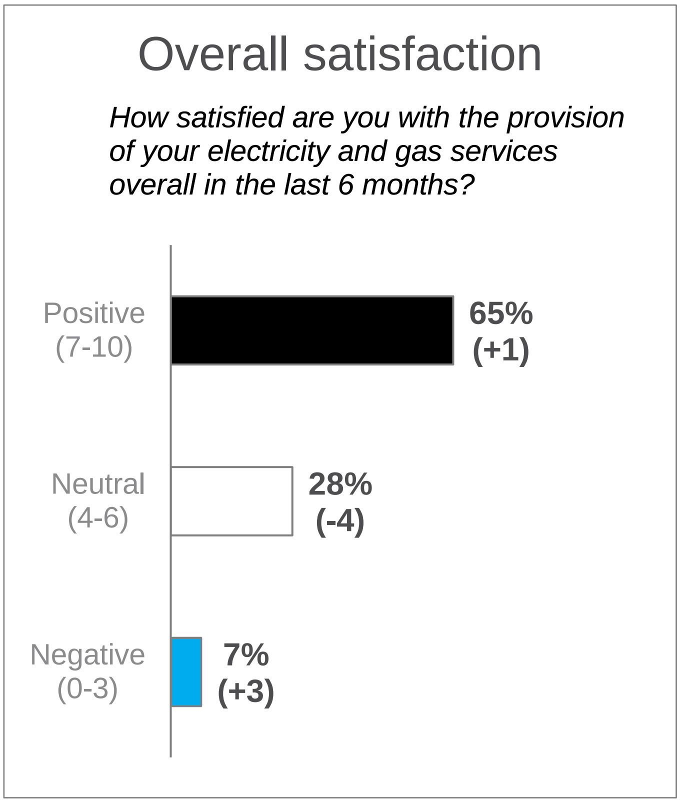
Tasmania

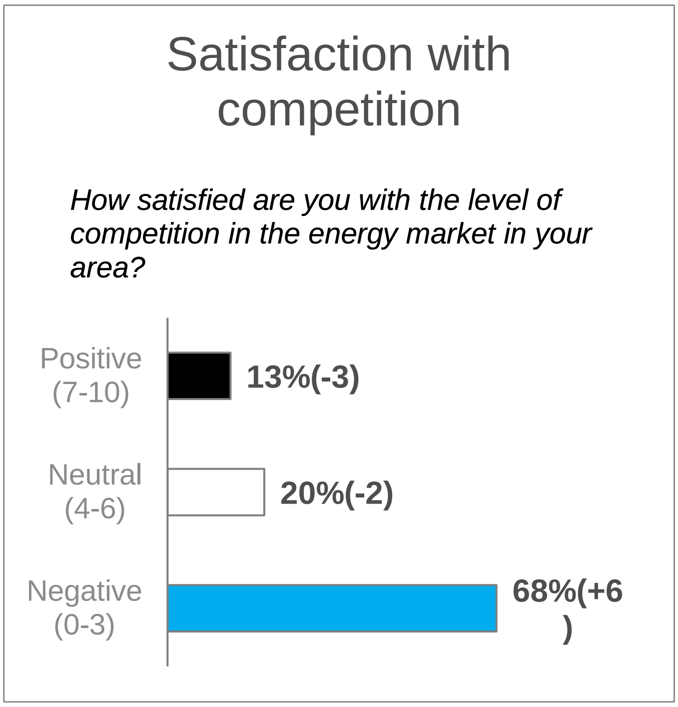
Satisfaction

Overall satisfaction

There is little change in overall satisfaction with electricity and gas services amongst Tasmanian household consumers. 65% now say they are satisfied, up 1% since March / April 2016.

Satisfaction with levels of competition in Tasmania remain low. 13% now say they are satisfied, down 3% on last year.



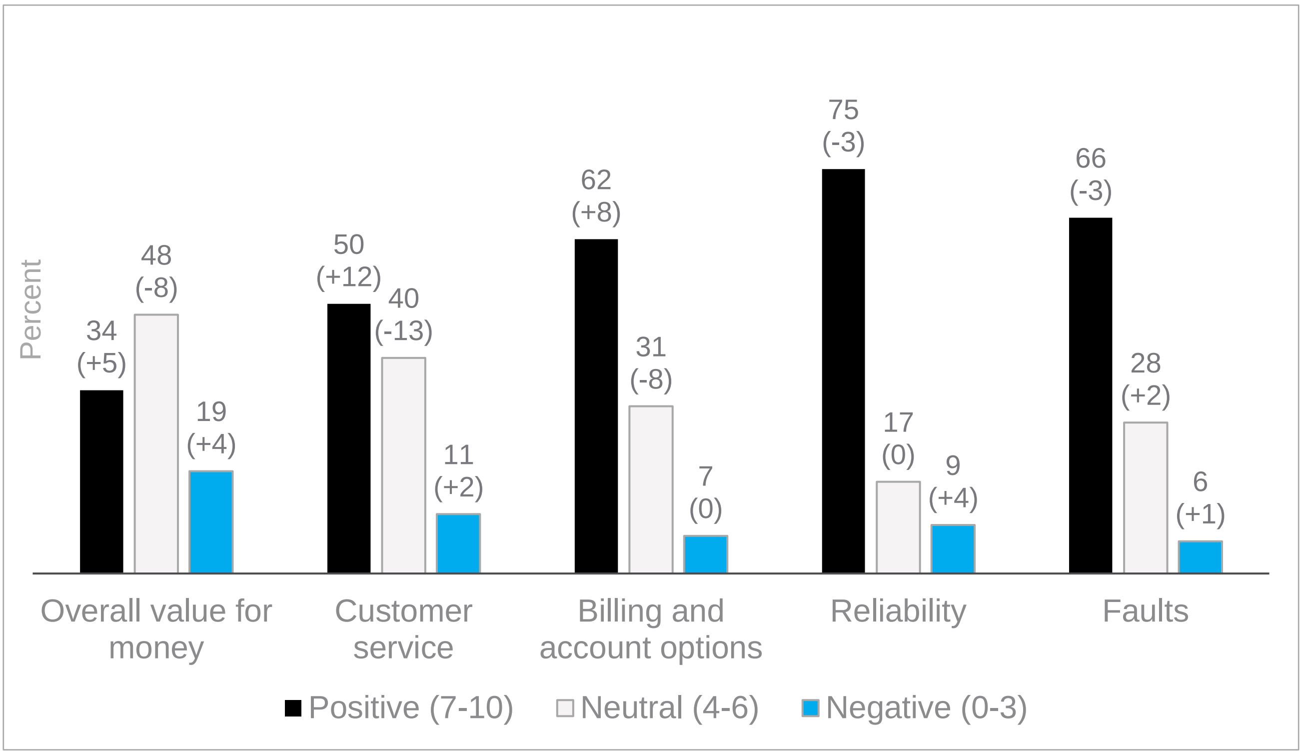


Satisfaction with electricity

Ratings for specific aspects of electricity are generally up.

- 50% of Tasmanian household consumers now say they are satisfied with customer service (up 12%) and 34% are now satisfied with the value for money of electricity (up 5%)

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



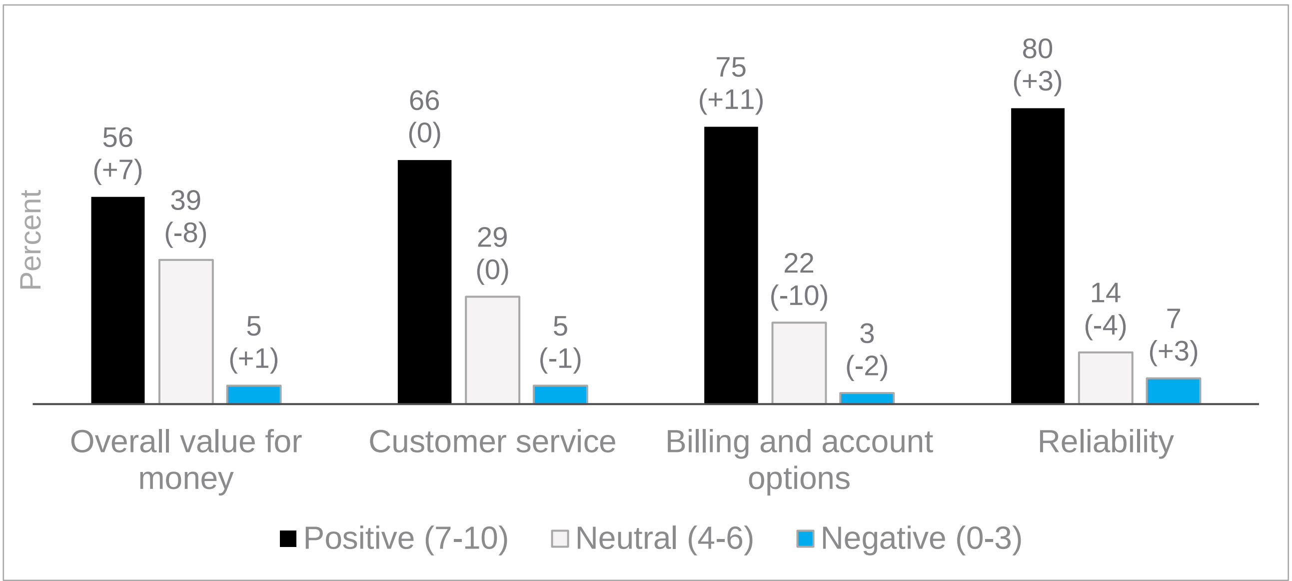
Satisfaction

Satisfaction with gas

Tasmanian household consumers with gas rate the reliability, billing and account options and reliability of gas higher than their counterparts in last year's survey.

- 80% are now satisfied with the reliability of gas, up 3% on the March / April 2016 survey.
- There is an 11% increase in the proportion satisfied with the billing and account options, and a 7% increase in those satisfied with overall value for money.
- 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'



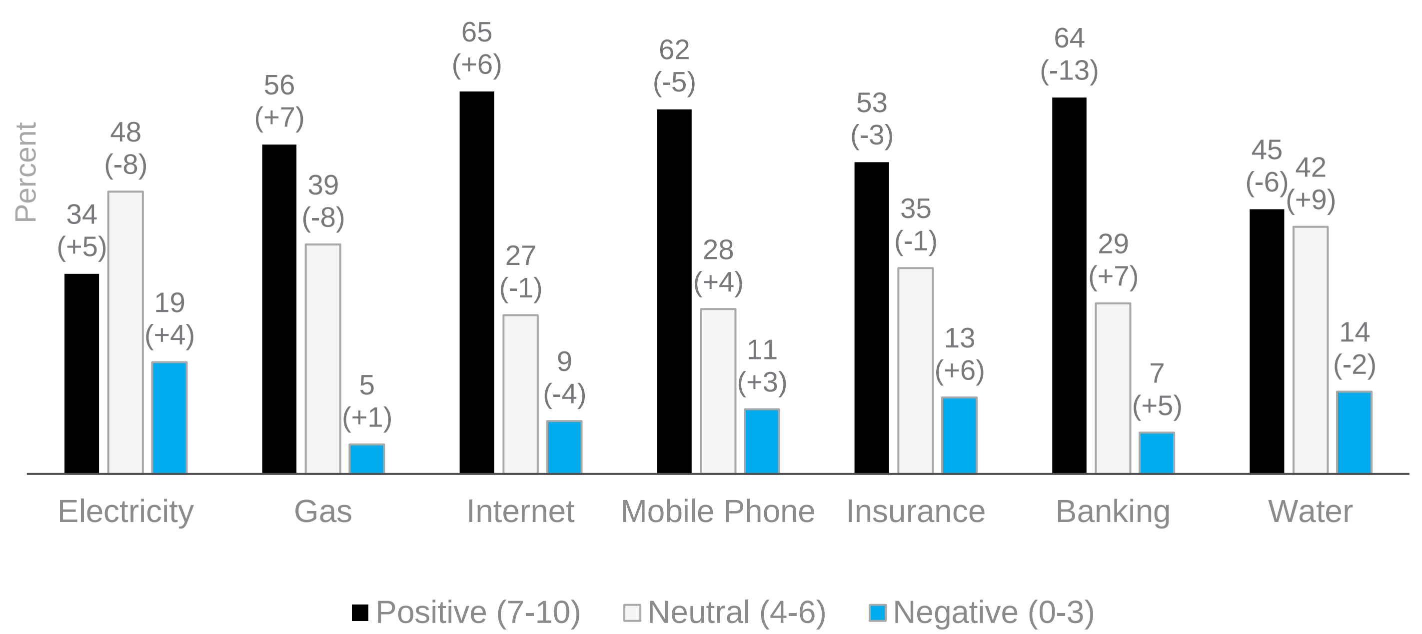
Base: Tasmanian consumers with gas (n=59)
INDICATIVE ONLY: SMALL SAMPLE SIZE

Satisfaction with utilities

The gap between electricity and other services in terms of value for money remains large.

- 34% of Tasmanian household consumers now rate the value for money of electricity services positively. The second lowest utility is water, with 45% satisfaction.
- A 7% increase in satisfaction for gas has made it comparable with other utilities, thought it still trails internet (65%), banking (64%), and mobile phone (62%).

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



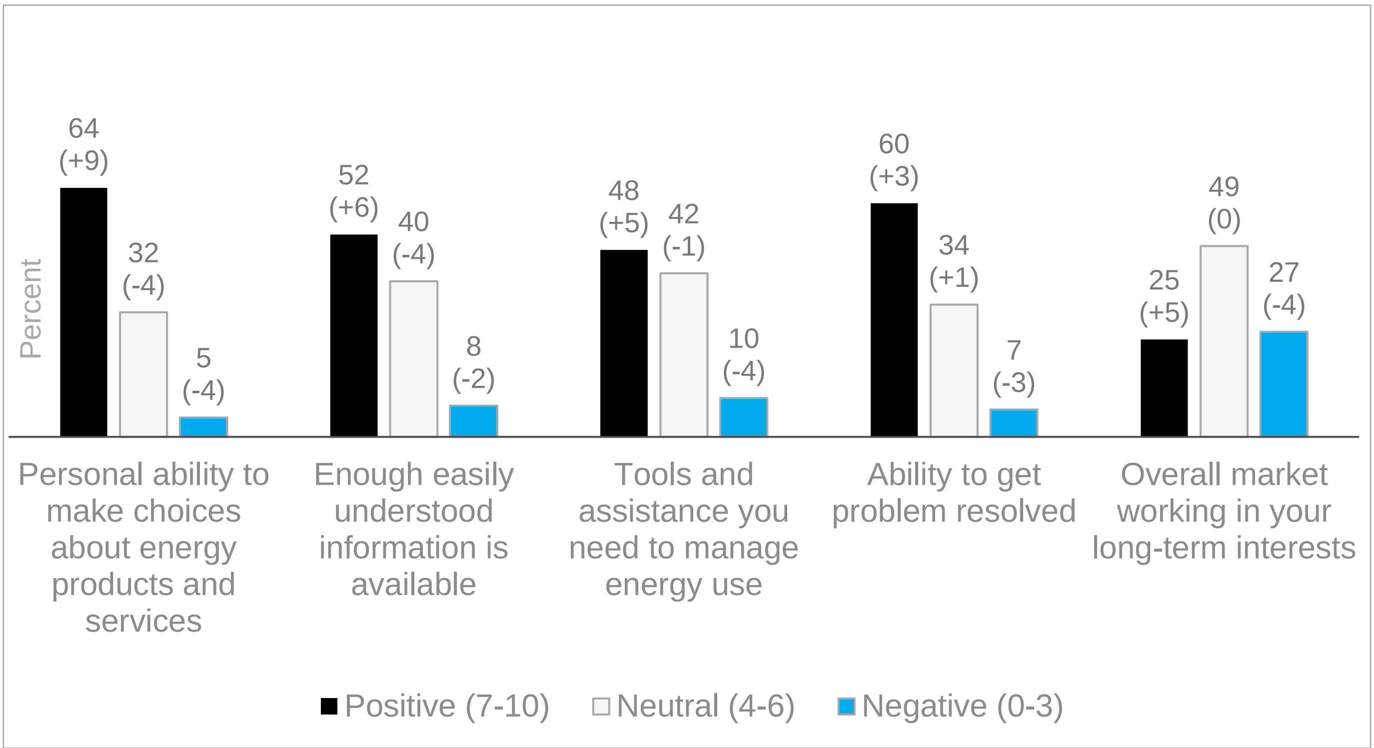
Confidence

Confidence in information and tools

The proportion of Tasmanian household consumers who feel confident in most factors is up in this survey.

- 64% rate their confidence as 7 or more out of 10, up 9% on last year's survey.
- 52% feel confident that there is enough easily understood information available, up 6%
- 48% feel confident in the tools and assistance needed to manage their energy use, up 5%.

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



Confidence

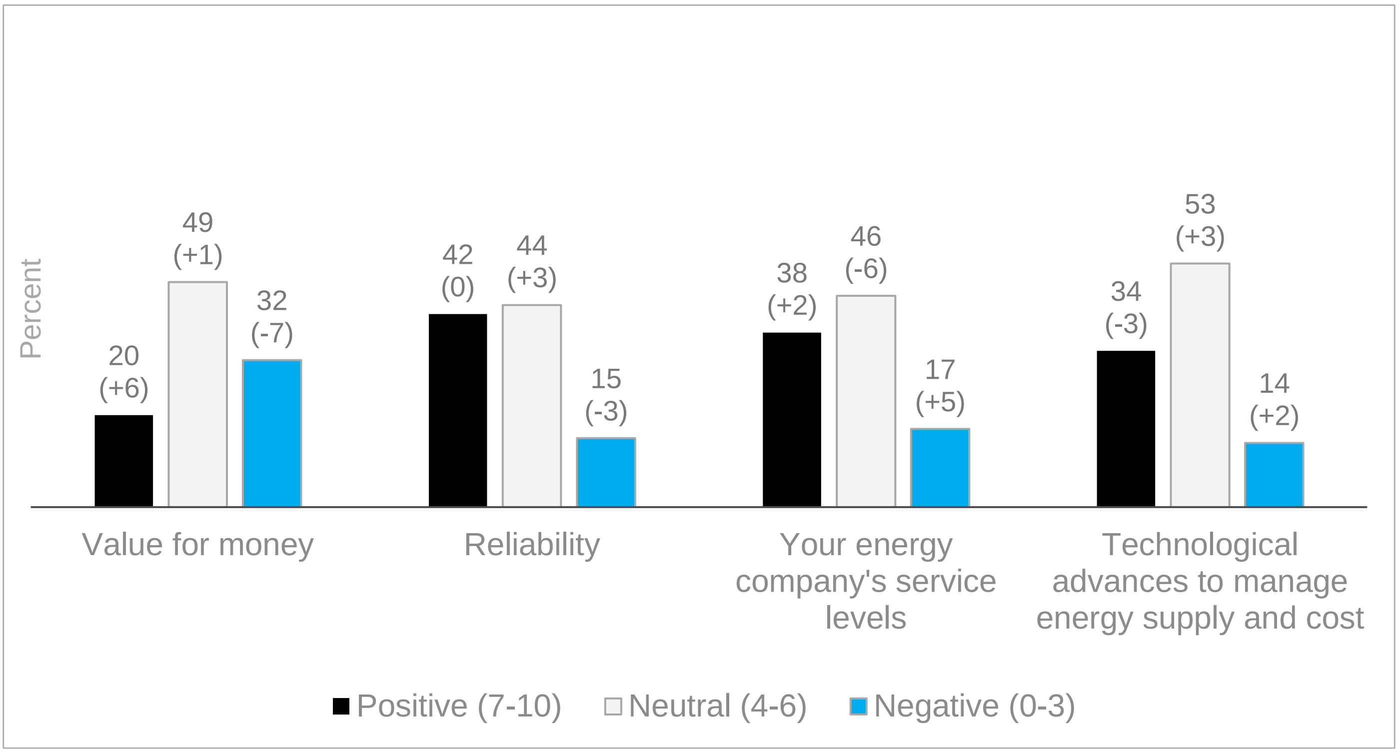
Confidence in long term outcomes

Confident in the market delivering better value for money in the long-term has increased since this time last year

- The proportion of Tasmanian household consumers who are confident that the market will deliver better value for money is unchanged is 20%, up 6% since this time last year.
- All other changes were within the margin of error.

"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'



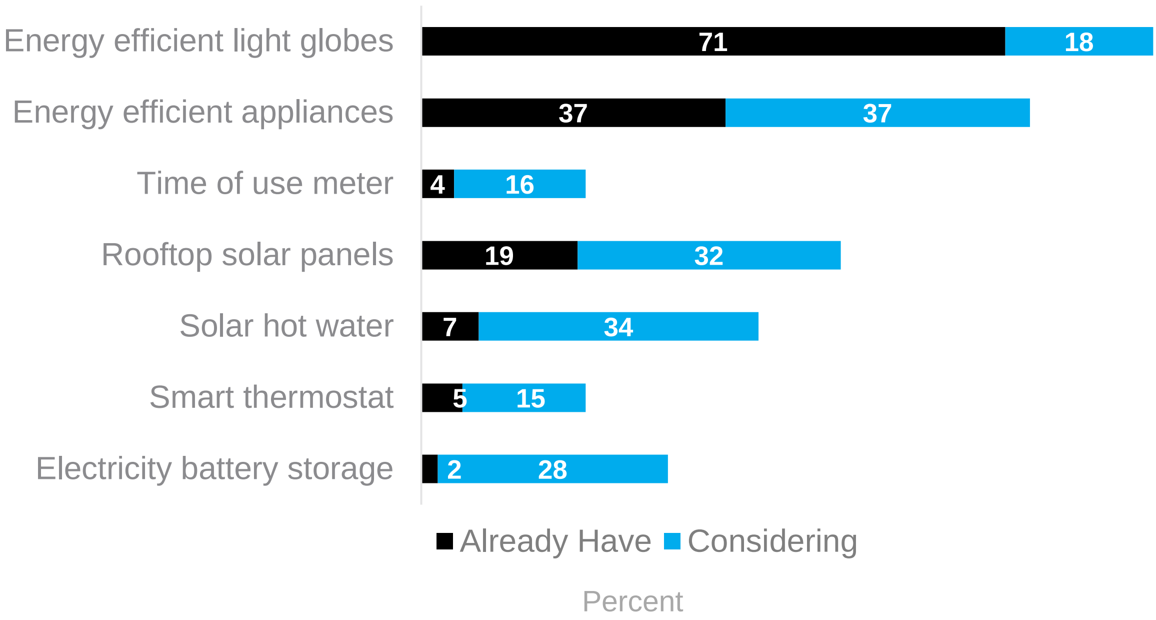
Activity

Uptake of technologies

Tasmanian household consumers in this survey are relatively likely to be considering getting more energy efficient appliances.

- 37% are considering energy efficient light appliances.

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



Activity

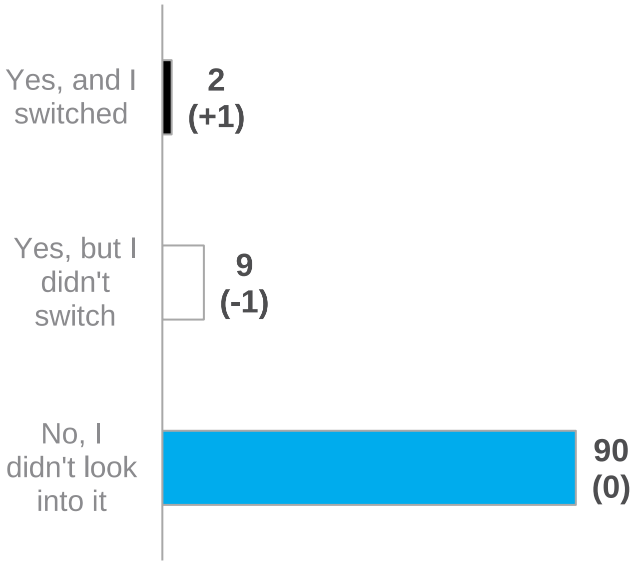
Switching behaviour

Switching activity amongst Tasmanian household consumers remains low.

.

Previous behaviour

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



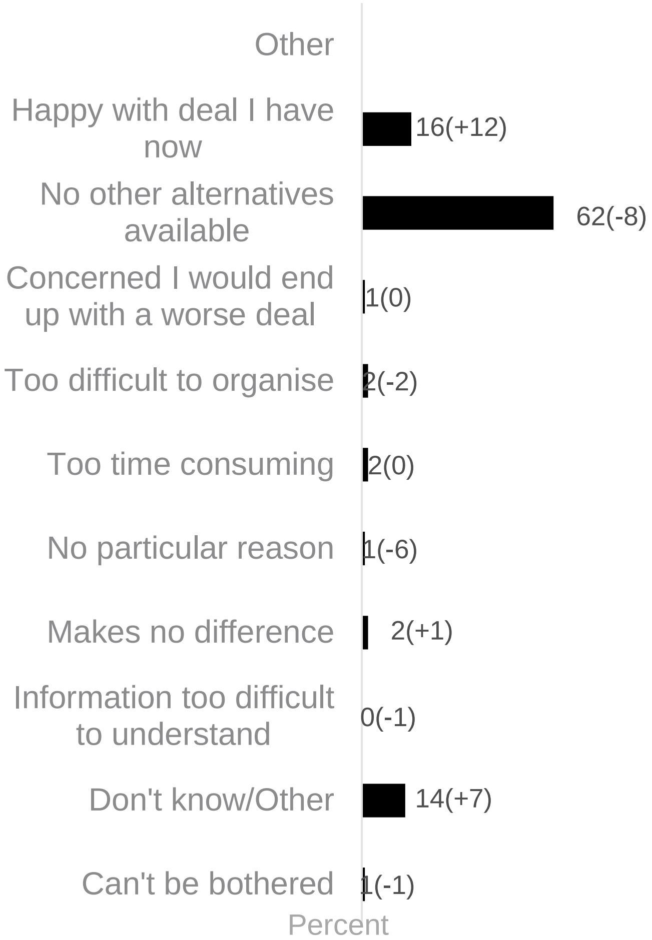
Activity

Reasons for not switching

The belief that there are no alternatives remains the main reason Tasmanian household consumers give for not considering switching, though this proportion has fallen.

- 62% say that this is the main reason, down 8% since ththis time last year.
- 16% said they were happy with their current deal, up 12% from last year.

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



Base: Tasmanian household consumers who had not considered switching in the last 3 years (n=179)

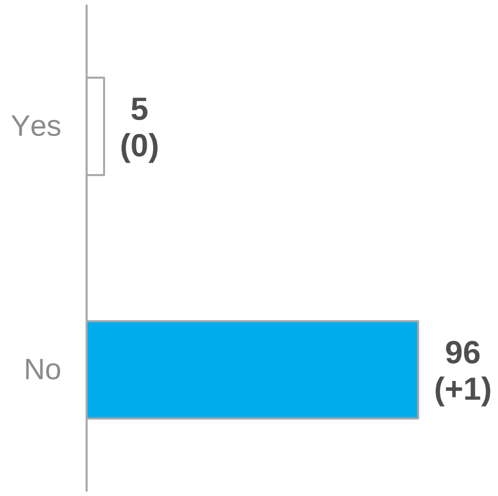
Activity

Switching intentions

Just 5% of Tasmanians say they intend to switch energy companies or plans in the year ahead. This is the same as last year.

Future Intentions

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



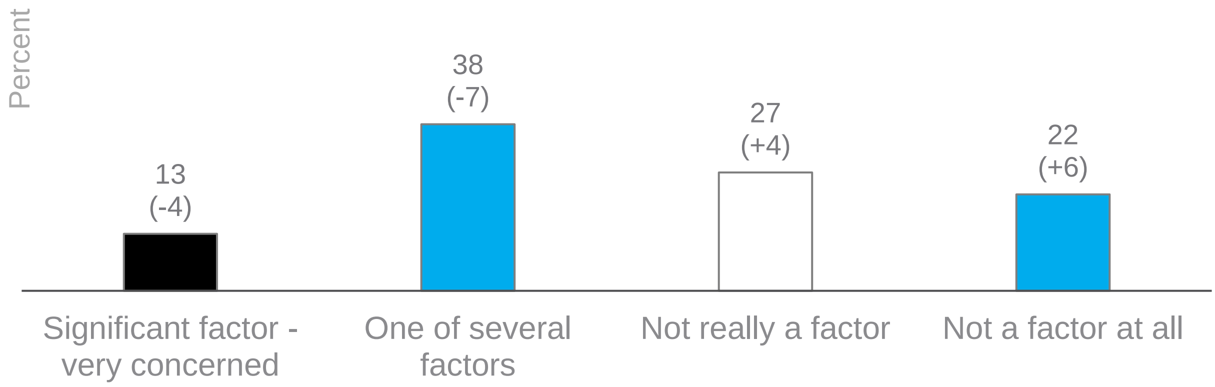
Activity

Consideration of the environment

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

- 13% say that it is one of the most important factors, down 4% on the March / April 2016 survey.
- 38% consider it to be one of several factors (down 7%).

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



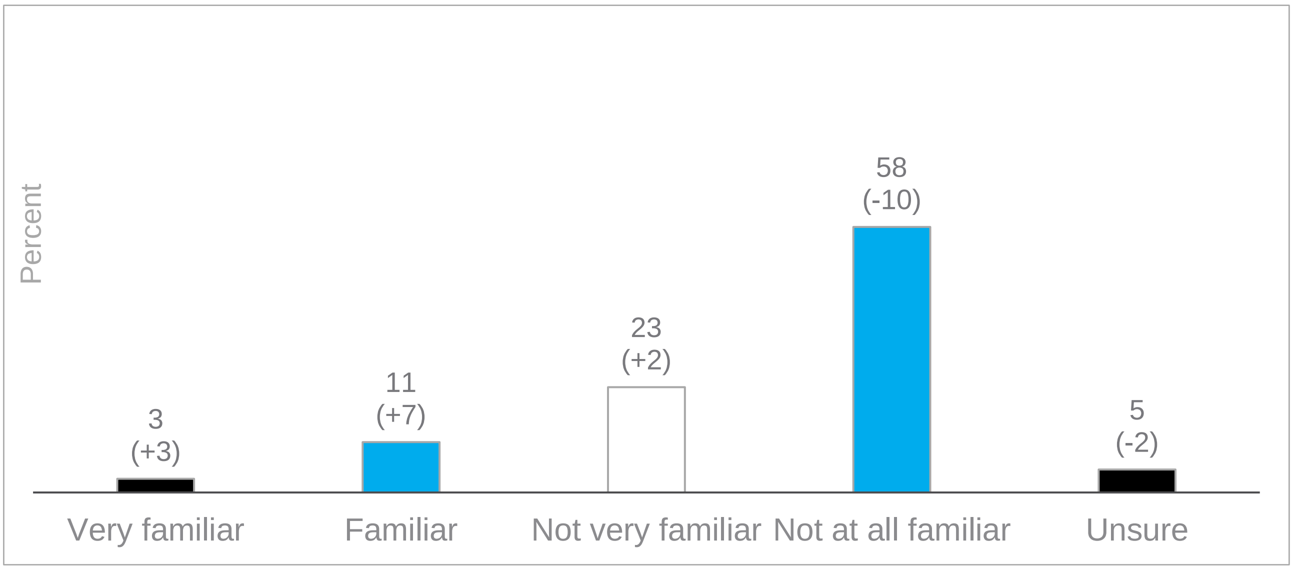
Other

Awareness of ECA

There was a sizable increase in knowledge of Energy Consumers Australia among Tasmanian household consumers.

- 14% said they were familiar, a 10% increase from this time last year.

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



Australian Capital Territory

Satisfaction

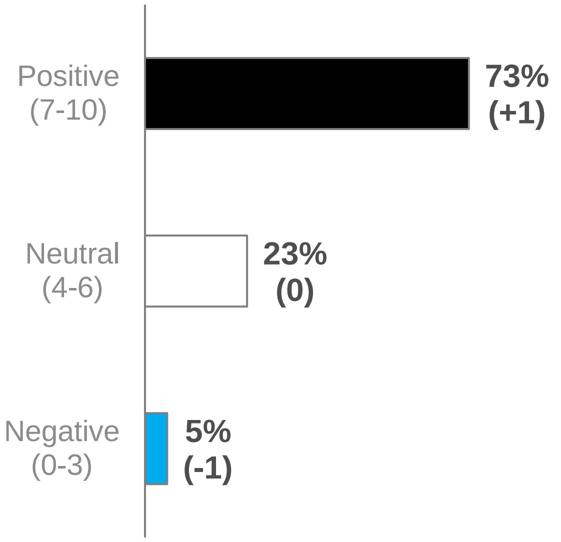
Overall satisfaction

satisfaction with electricity and gas services amongst household consumers is steady. 73% say they are satisfied, up 1% on a year ago.

Satisfaction with the levels of competition has increased. 37% of ACT household consumers now say they are satisfied, up 14% since March/April 2016.

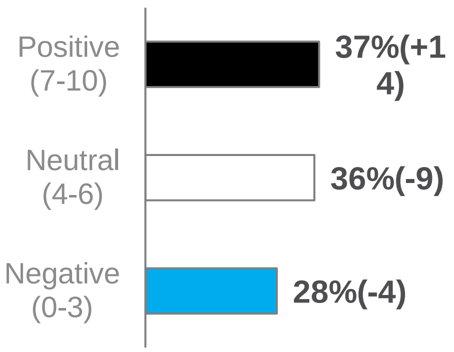
Overall satisfaction

"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?"



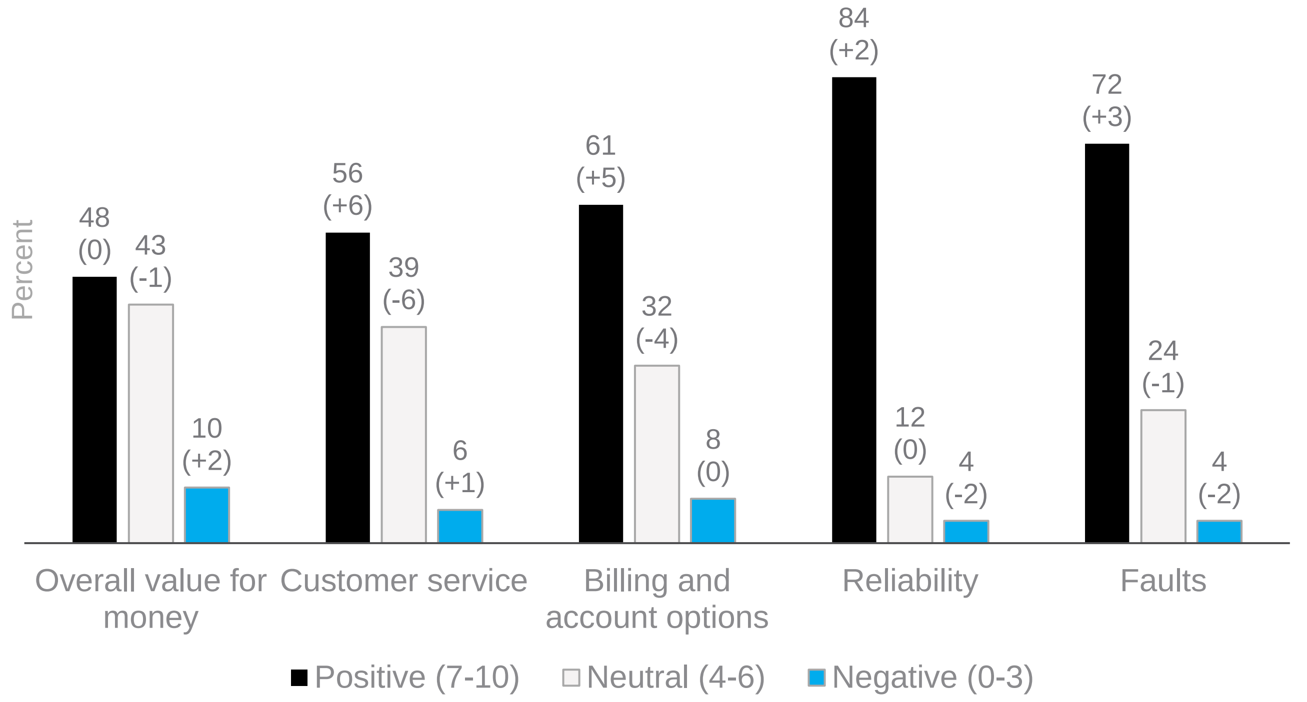
Satisfaction

Satisfaction with electricity

ACT household consumers in this survey give higher ratings than those in last year's survey for the billing and account options and customer service.

- 56% now rate cusomter service positively, up 6% since this time last year.
- 61% now rate billing and account options positively, up 5% since this time last year.

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



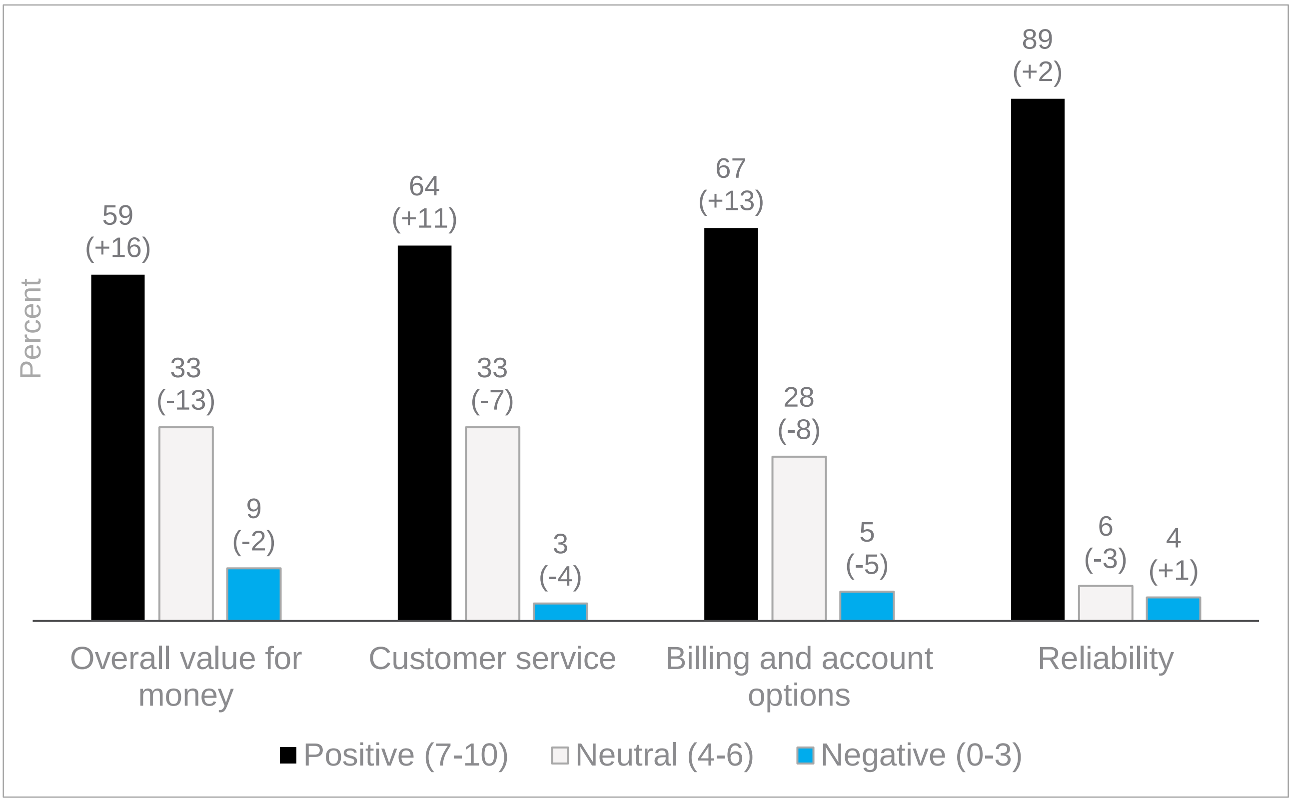
Satisfaction

Satisfaction with gas

Ratings for gas are up for all four of these measures.

- The largest change was to satisfaction with overall value for money (up 16% to 59%).
- There were also large increases for billing and account options (up 13% to 67%) and customer service (up 11% to 64%).

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



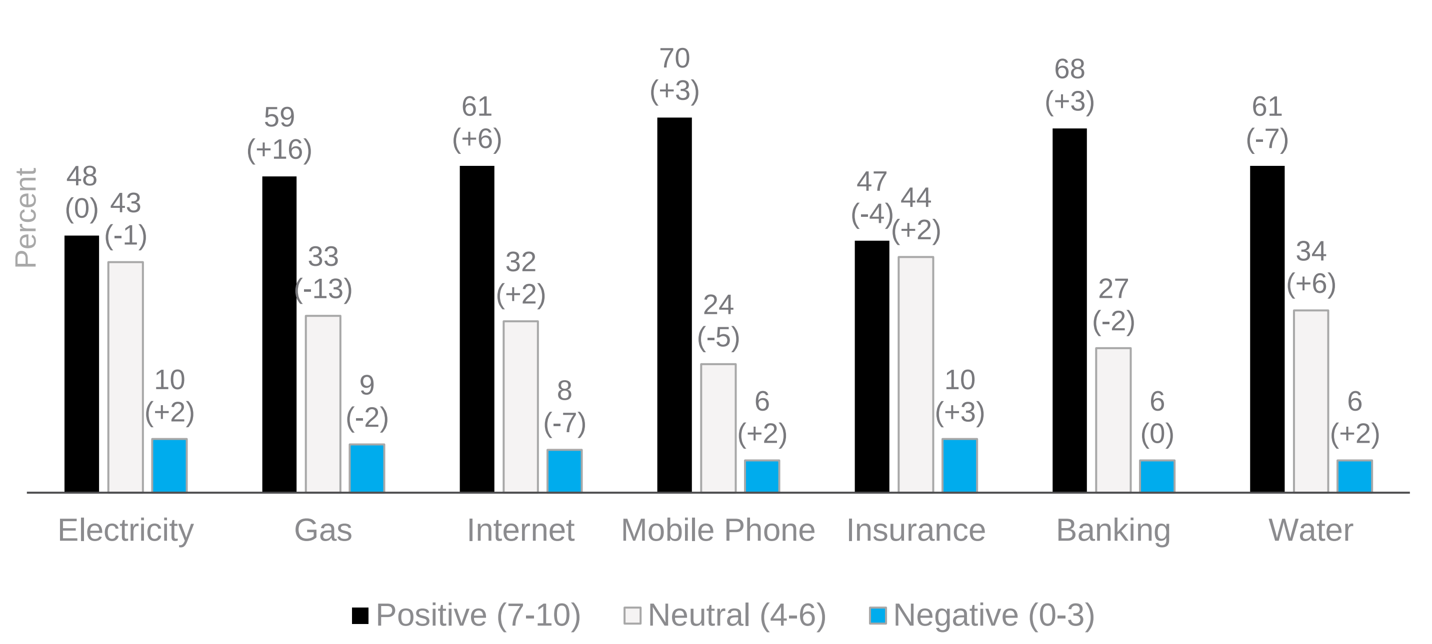
Satisfaction

Satisfaction with utilities

A large increase in satisfaction for gas has made it comparable with other utilities, although electricity still trails all utilities other than insurance.

- Other than the increase in gas satisfaction, the largest change was a 7% decrease in satisfaction with water, which went down to 61% overall.

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



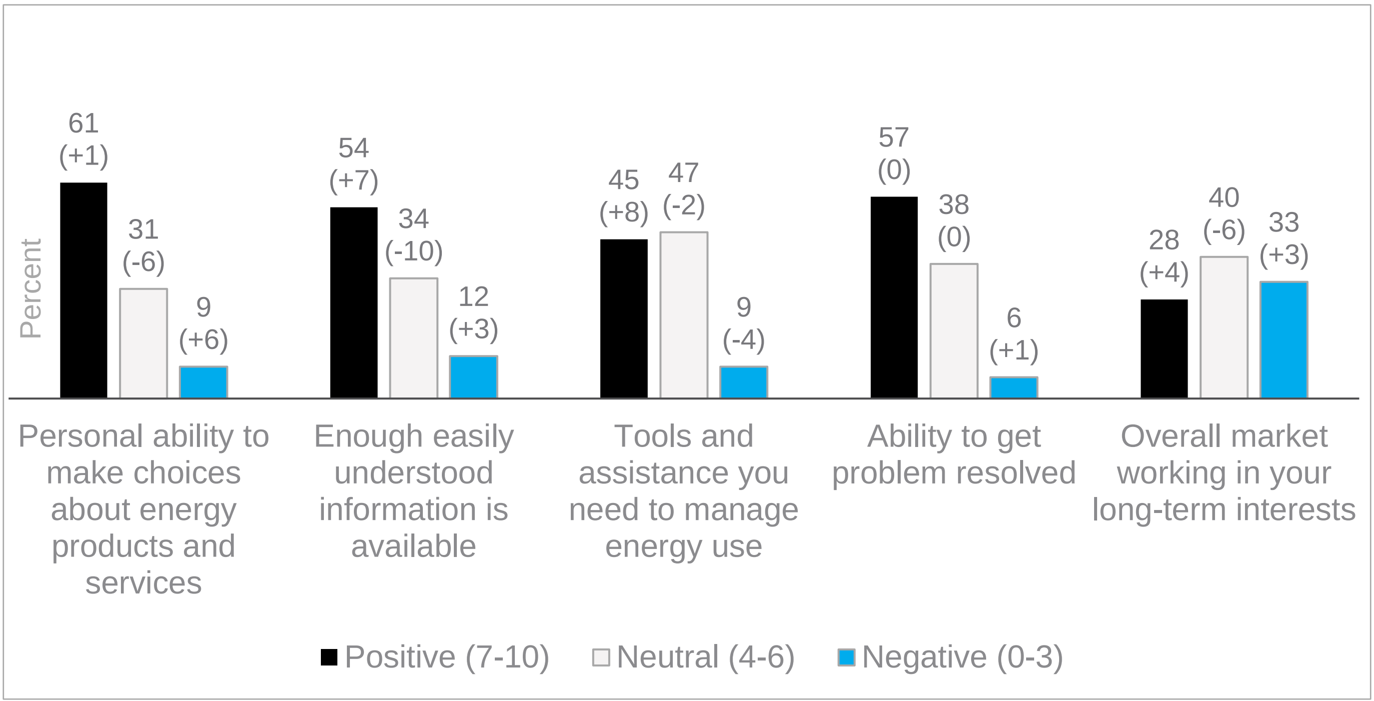
Confidence

Confidence in information and tools

ACT household consumers in this survey are more likely than those in last year's survey to say they are confident in the availability of easily understood information and the tools and assistance they need to manage energy use.

- 54% say they are confident in the availability of information (up 7% to 54%), down 6% on the March / April 2016 survey.
- 45% say they are confident in being able to access tools and assistance to manage energy use (up 8% to 45%).

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



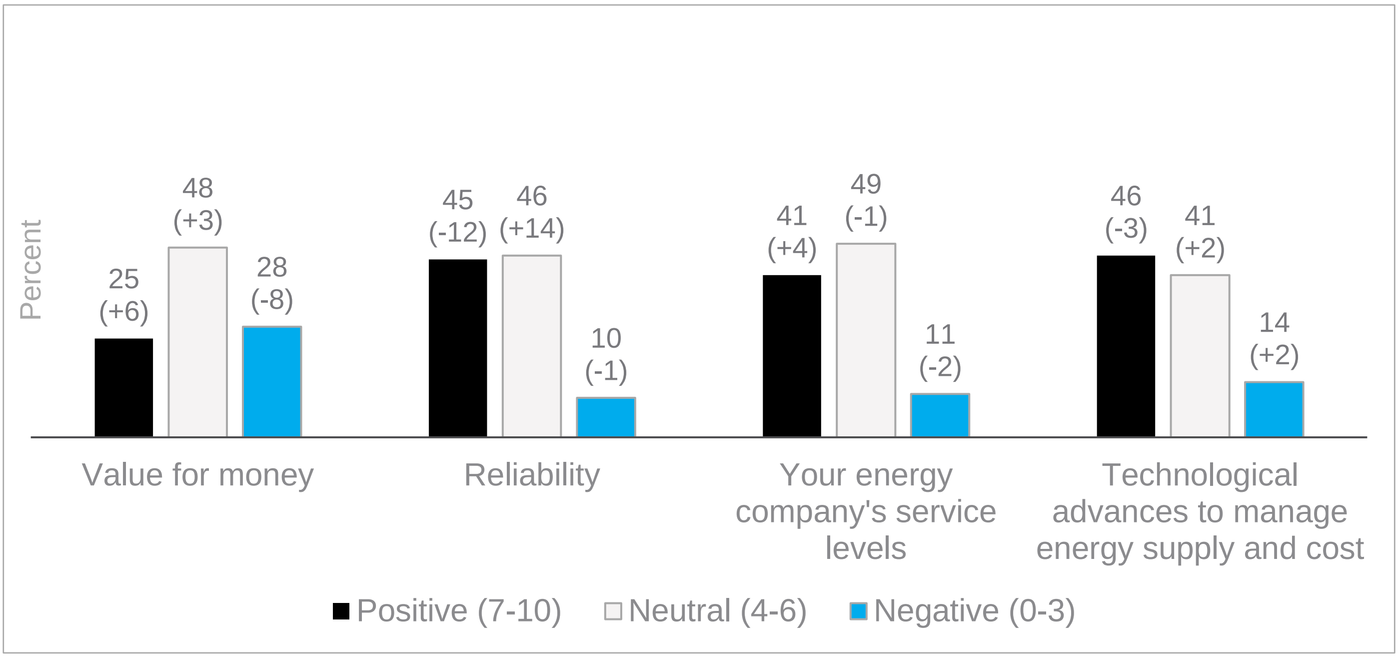
Confidence in long term outcomes

ACT household consumers in this survey are less likely than those in last year's survey to say they are confident in the market providing greater reliability, but more confident that it would provide greater value for money.

- 45% said it would provide greater reliability (down 12% since last year).
- 25% said it would provide greater value for money (up 6%).
- 41% said it would provide greater service levels (up 4%).

"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'



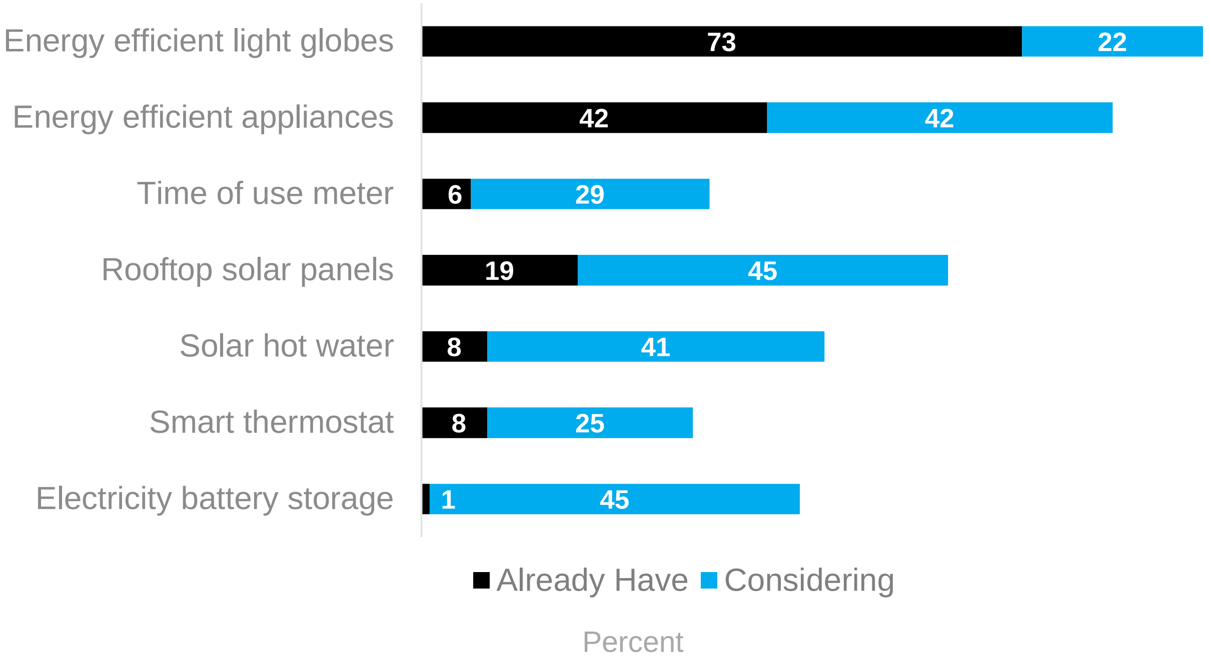
Activity

Uptake of technologies

A substantial proportion of ACT household consumers say they are currently considering rooftop solar and / or electricity battery storage.

- 45% are considering rooftop solar, the highest for any state or territory.
- 45% say they are considering electricity battery storage.

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



Activity

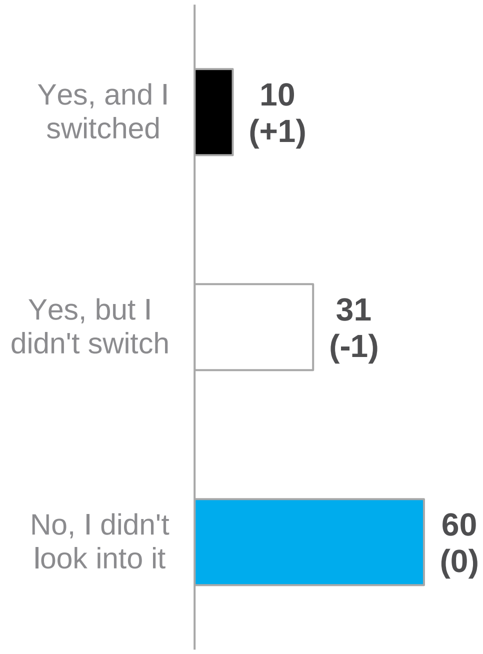
Switching behaviour

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

- 10% say that they have actually switched (up 1%).
- 31% claim to have considered switching but not done so (down 1%).

Previous behaviour

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



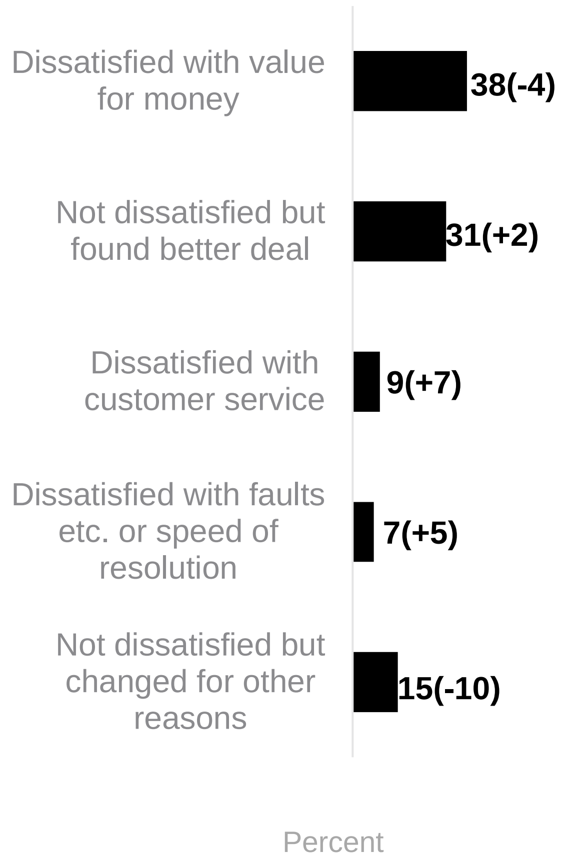
Activity

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 those who changed for "other reasons".

- 15% now say that they changed for other reasons, down 10% since this time last year.
- 9% said they considered switching because they were dissatisfied with their customer service (up 7%).

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



Base: ACT household consumers who considered switching in the last 3 years (n=81).

INDICATIVE ONLY: SMALL SAMPLE SIZE

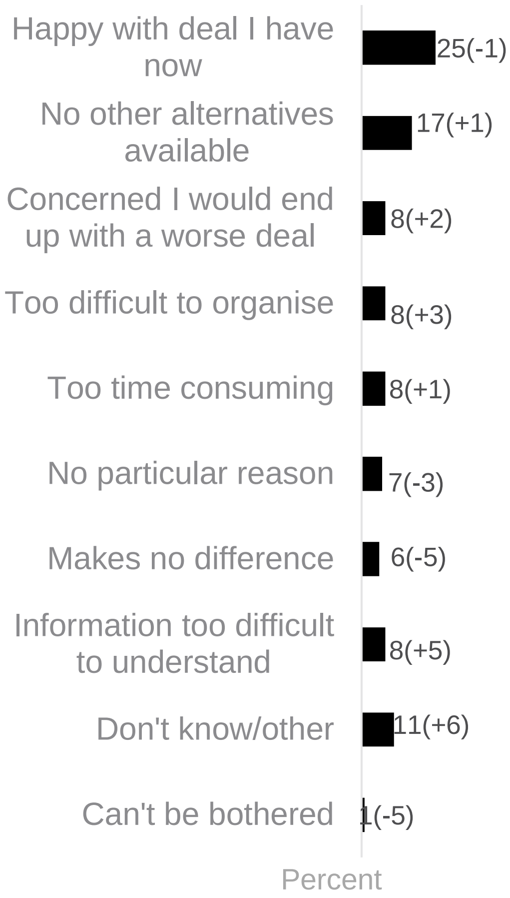
Activity

Reasons for not switching

ACT household consumers in this survey are more likely than those in last year's survey to say that they have not switched either because they the information is too difficult to understand.

- 8% said the information was too difficult to understand (up 5% from this time last year).
- 6% said that switching doesn't make any difference (down 5%).

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



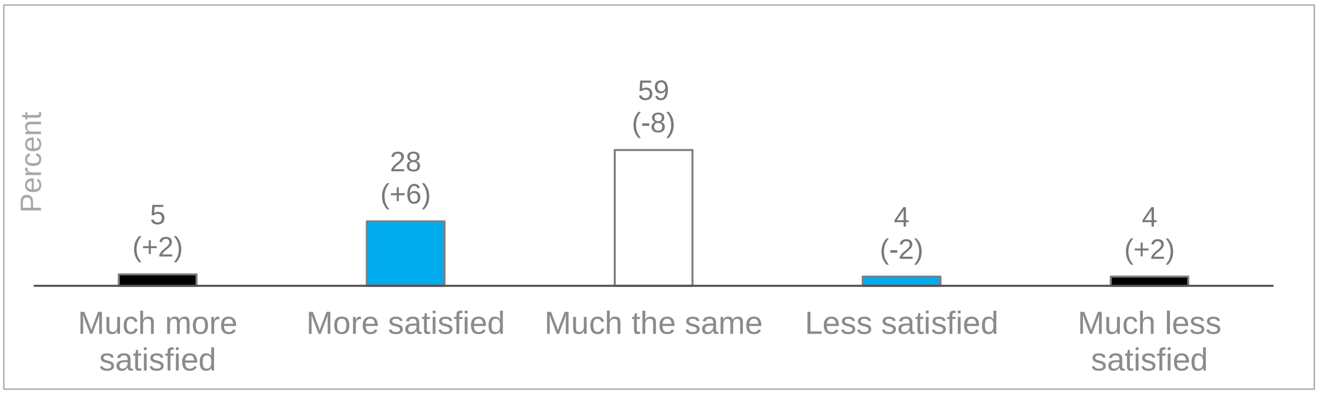
Base: ACT household consumers who had not considered switching in the last 3 years (n=119)

Satisfaction after considering switching

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

- 33% now say that looking made them more satisfied, up 8% on this time last year.

"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=81)

INDICATIVE ONLY: SMALL SAMPLE SIZE

Activity

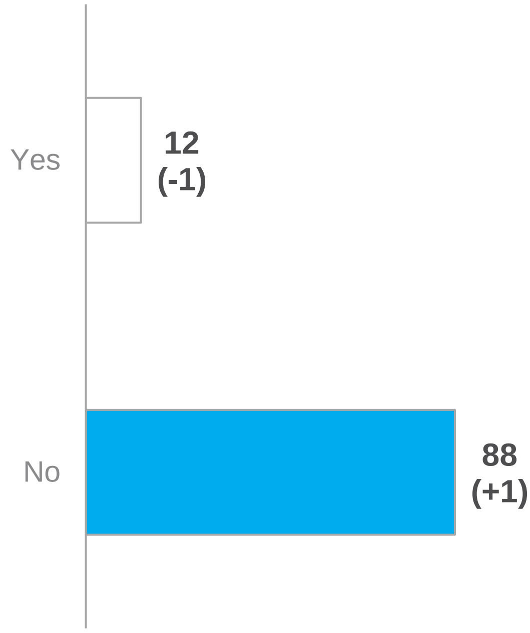
Switching intentions

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

- 12% say that they intend to switch in the year ahead, down 1% on the March / April 2016 survey.

Future Intentions

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



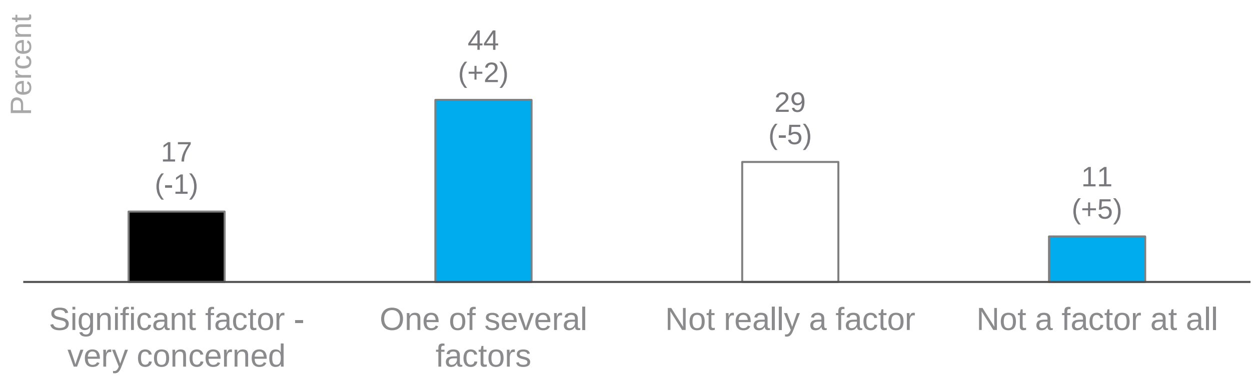
Activity

Consideration of the environment

ACT household consumers in this survey differed little in their emphasis on the environment than those in the previous survey.

- 17% now say that the environment is a very significant factor in their decisions, down 1% since the March / April 2016 survey.
- 44% state that it is one of several factors they consider (up 2%).

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



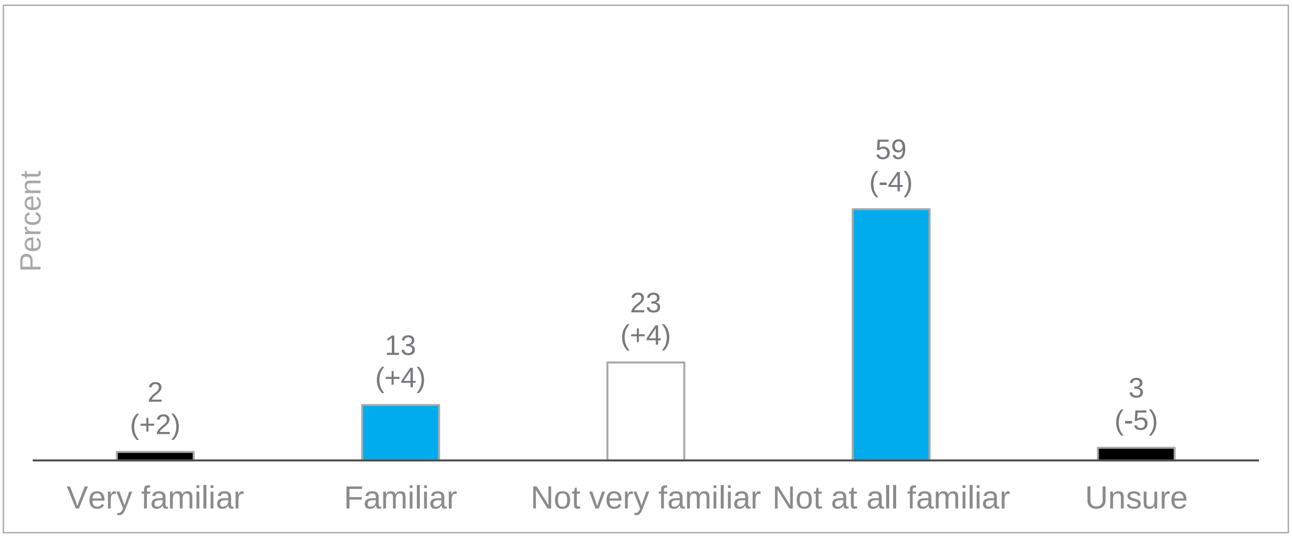
Other

Awareness of ECA

ACT household consumers in this survey are mor likely than those in last year's survey to claim to be familiar with Energy Consumers Australia.

- 15% claim to be very familiar or familiar with Energy Consumers Australia, up 6% on the March / April 2016 survey.

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



Western Australia

Satisfaction

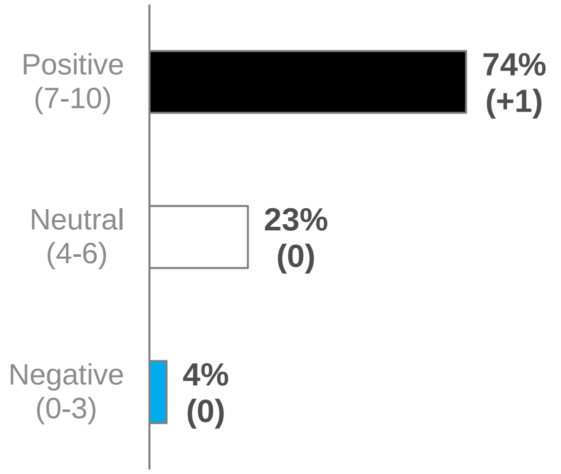
Overall satisfaction

Overall satisfaction with electricity and gas services amongst Western Australian household consumers is little changed over the last year. 74% are satisfied overall, up 1% since March / April 2016.

Western Australian household consumers do, however, appear to have become more satisfied with the level of competition (albeit from a low base). 33% now say they are satisfied, up 5% on a year ago.

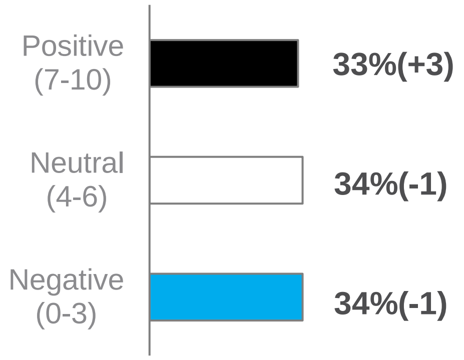
Overall satisfaction

"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?"



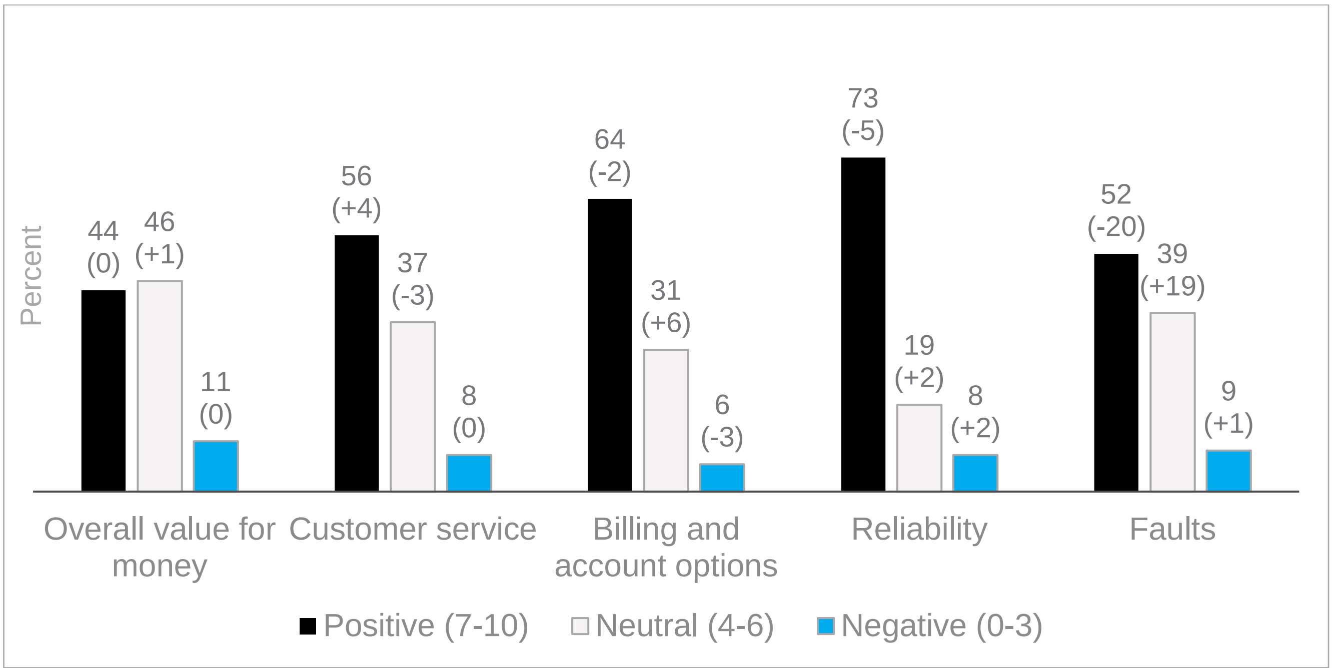
Satisfaction

Satisfaction with electricity

Western Australian household consumers' satisfaction with fault resolution dropped sharply since this time last year.

- 52% say that they are satisfied with the way faults have been handled, down 20% on this time last year.
- 73% say they are happy with reliability, down 5%.
- 56% said they were satisfied with their customer service, up 4%.

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



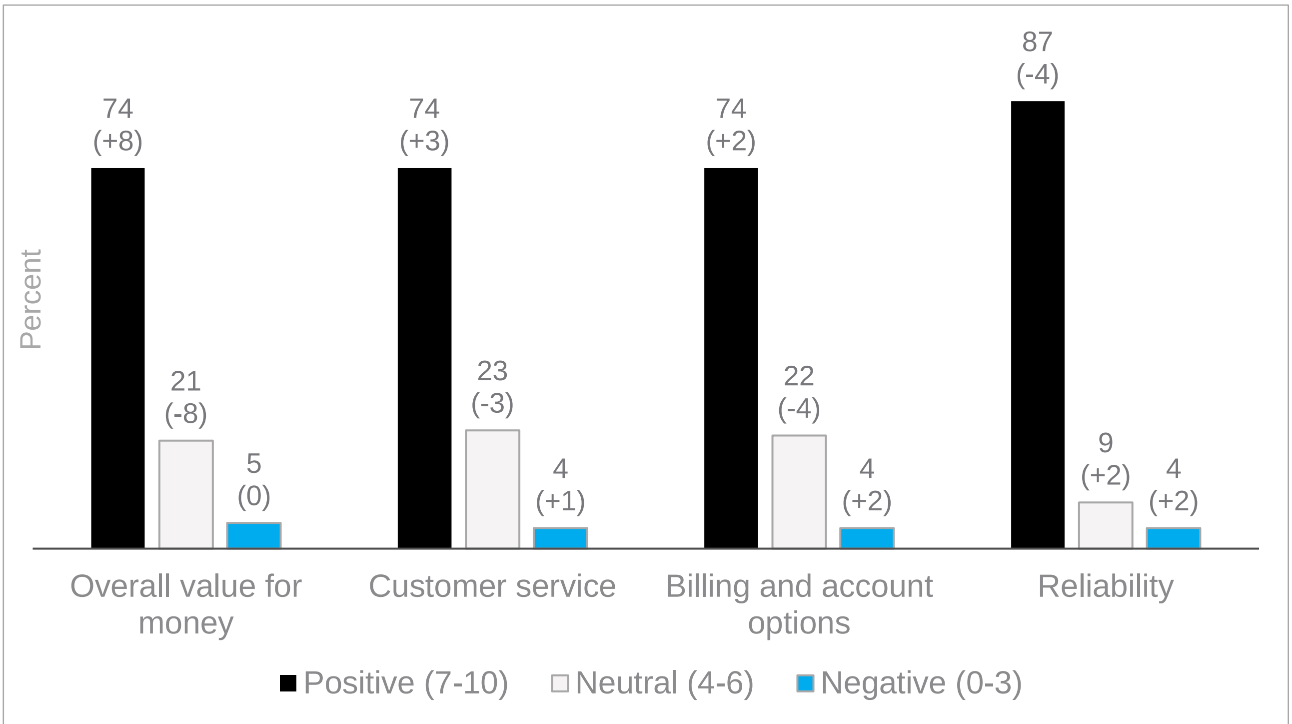
Satisfaction

Satisfaction with gas

Satisfaction with overall value for money has increased for Western Australian household consumers.

- Satisfaction with overall value for money increased 8% to 74% since this time last year.
- There were smaller increased for customer service (3% to 74%) and billing and account options (2% to 74%).
- Satisfaction with reliability dropped 4% to 87%.

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



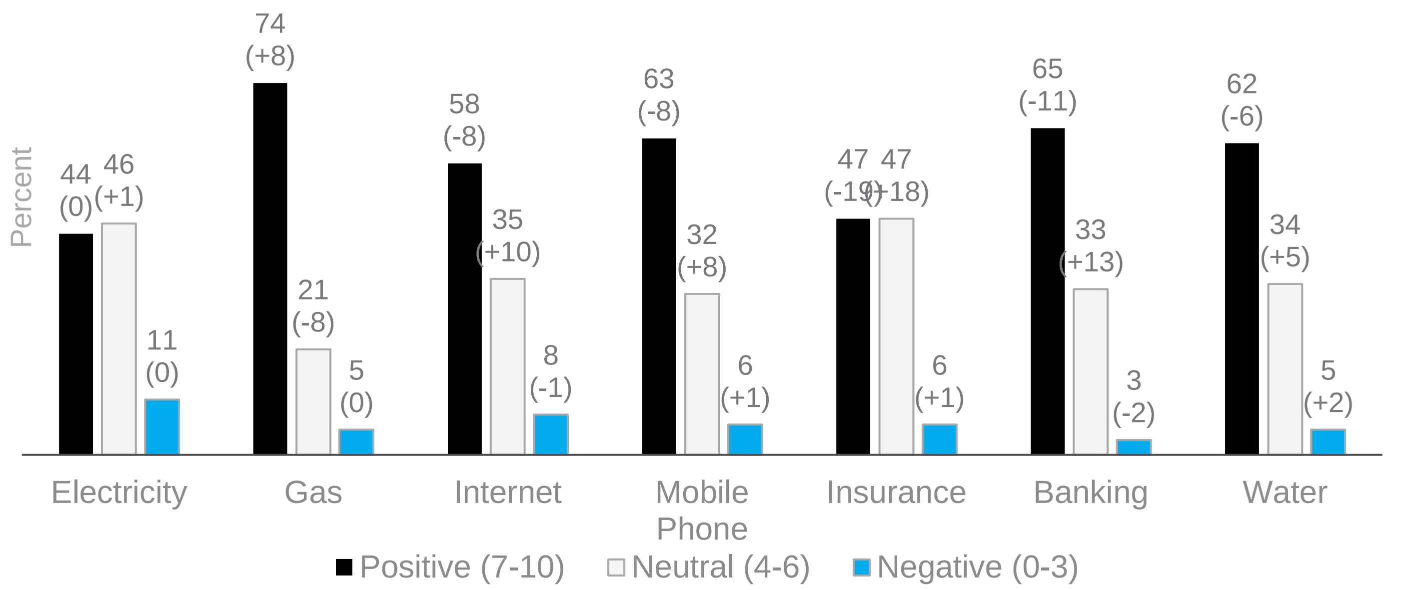
Satisfaction

Satisfaction with utilities

With the exception of gas and electricity, satisfaction with all other utilities dropped.

- The largest drops were insurance (down 19% to 47%) and banking (down 11% to 65%).

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



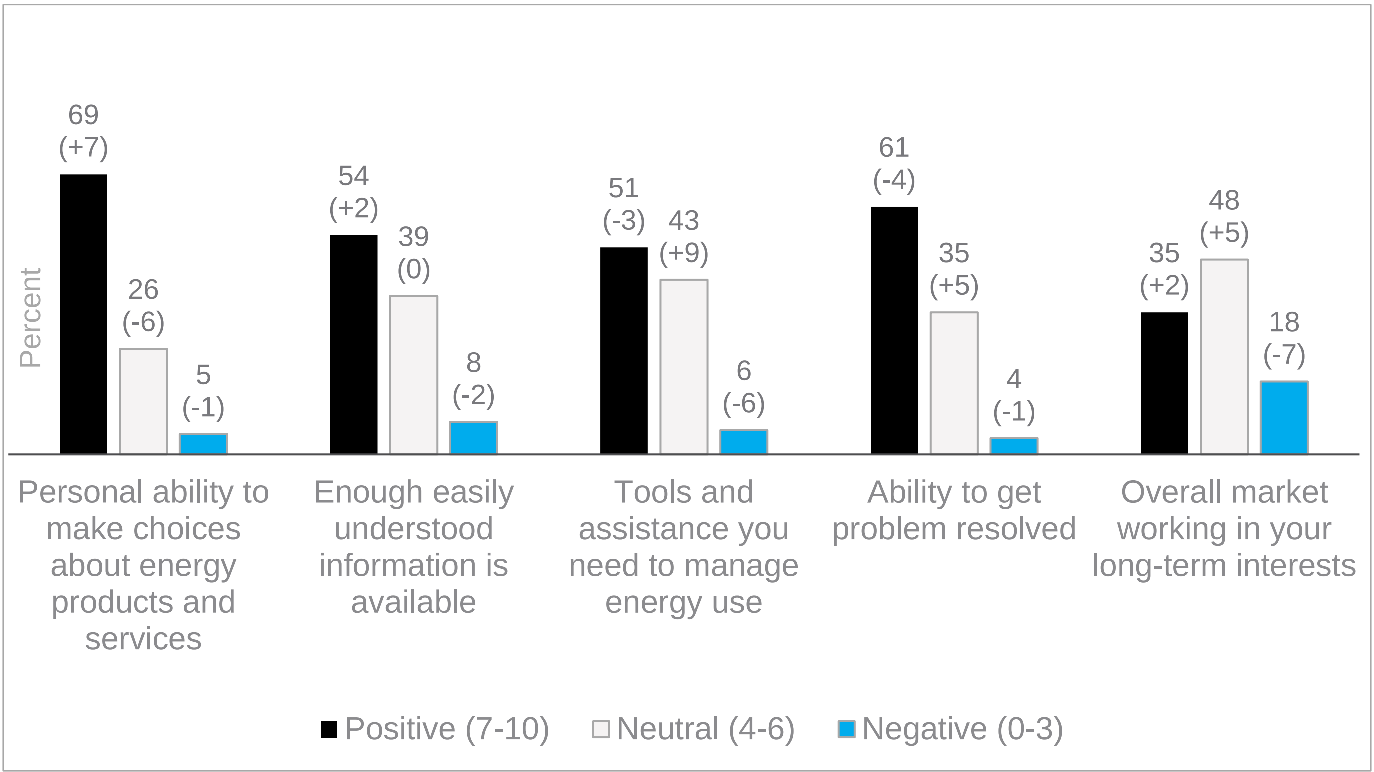
Confidence

Confidence in information and tools

Western Australian household consumers in this survey were more confident than those in the previous survey in their personal ability to make choices about energy products and services.

- 69% now say they are confident in this, up 7% on last year's survey.
- Confidence in ability to get problems resolved dropped 4% to 61%.
- All other changes are within the margin of error.

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



Confidence

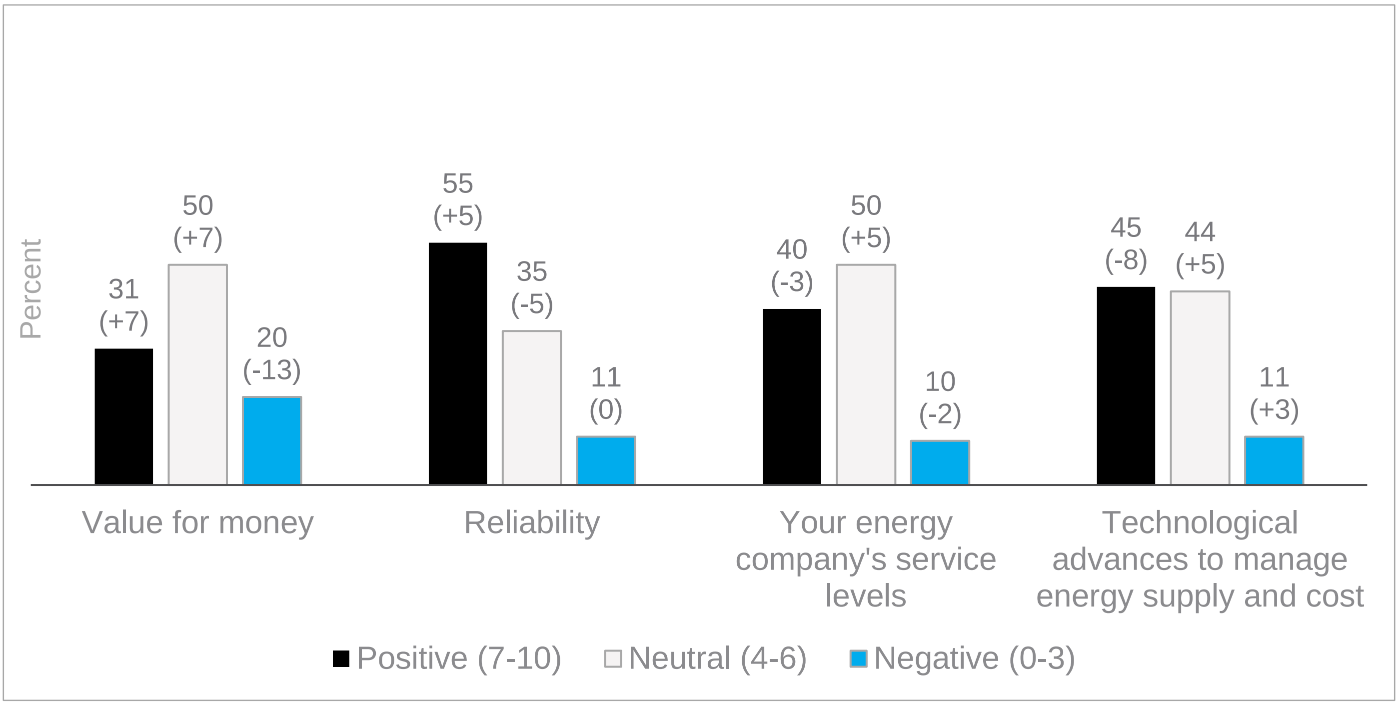
Confidence in long term outcomes

WA household consumers in this survey are more likely than those in last year's survey to say they are confident in the market providing value for money and reliability, but less confident that it would provide greaterservice levels or technological advances.

- 31% said it would provide greater value for money (up 7% since last year).
- 55% said it would provide greater reliability (up 5%).
- 45% said it would provide greater technological advances (down 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'



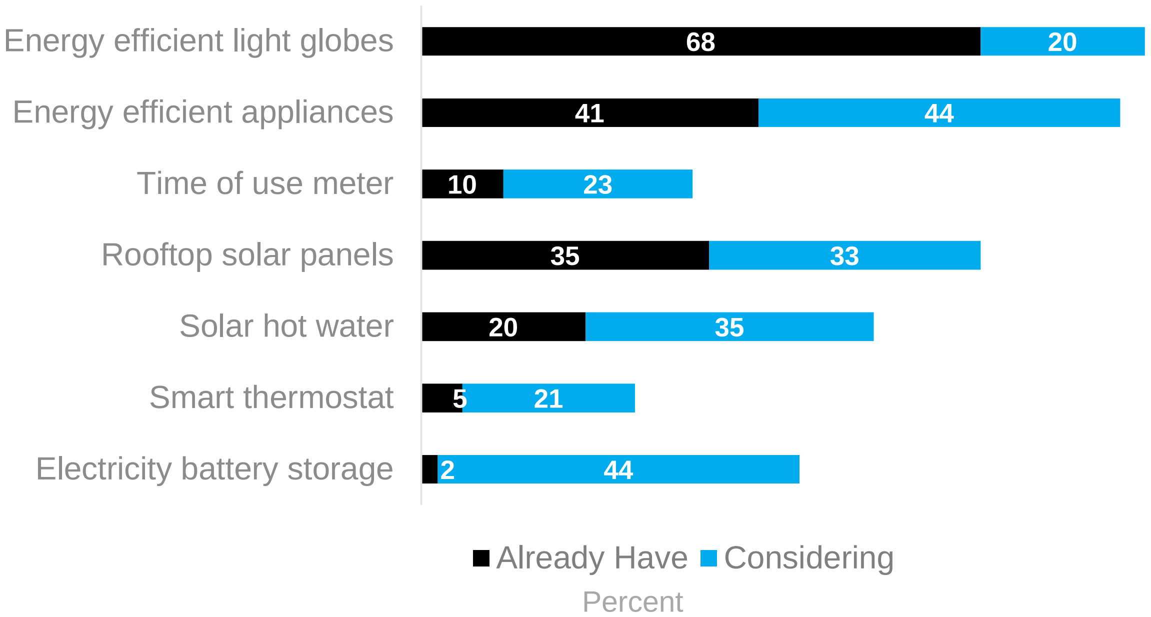
Activity

Uptake of technologies

Western Australian household consumers are relatively likely to say they are considering getting more energy efficient appliances and / or battery storage.

- 44% now say they are getting more energy efficient appliances.
- 44% say they are considering electricity battery storage.

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



Activity

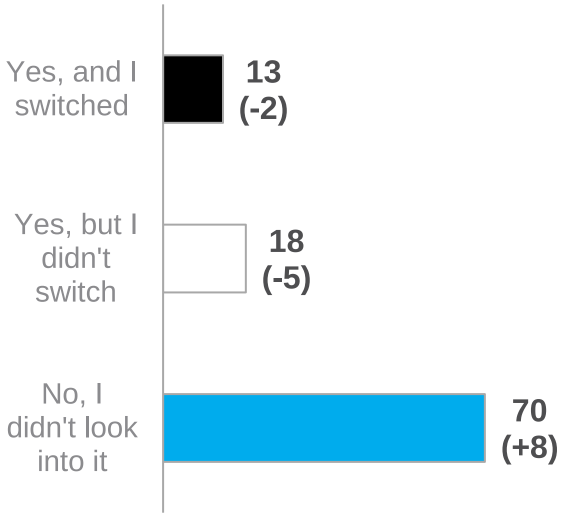
Switching behaviour

The proportion of Western Australian household consumers saying they have at least considered switching in the last three years is lower than in the March / April 2016 survey.

- There is a 5% decrease in the proportion saying that looked but not switched, and a 2% decrease in the proportion saying they switched. This results in a corresponding 8% increase in those who did not look into switching.

Previous behaviour

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



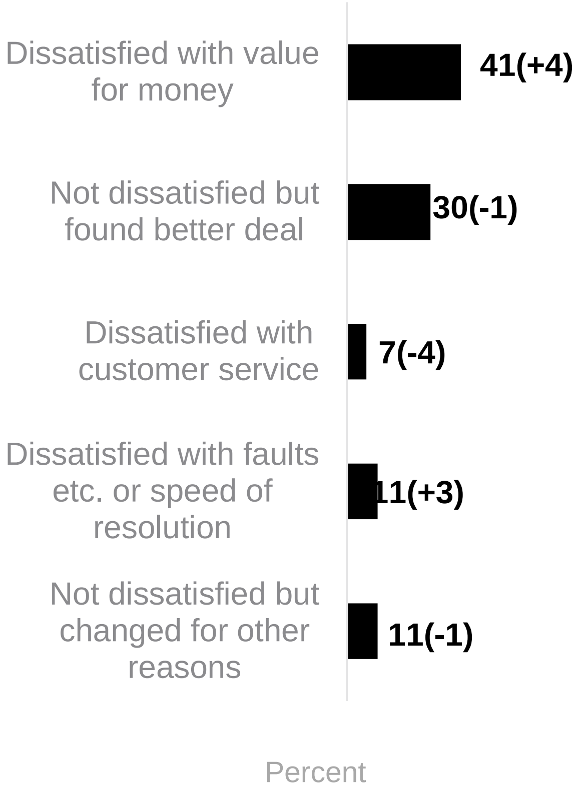
Activity

Reasons for switching

Dissatisfaction with value for money continues to be the main reason for considering switching.

- 41% of those who have considered switching nominated this as the reason, 4% higher than in last year's survey.

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



Base: WA household consumers who considered switching in the last 3 years (n=61).

INDICATIVE ONLY: SMALL SAMPLE SIZE

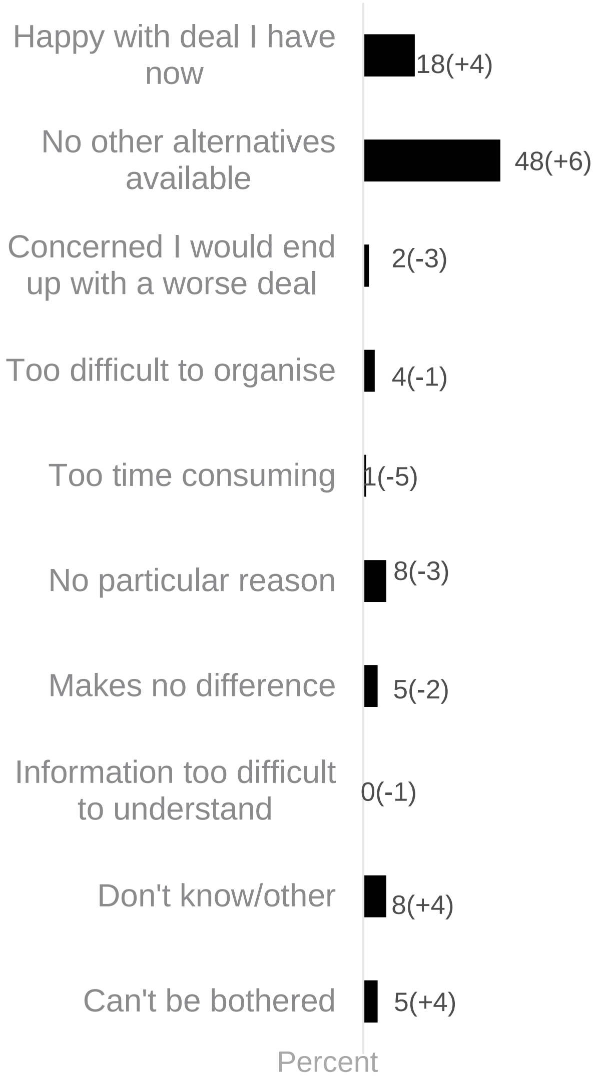
Activity

Reasons for not switching

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

- 53% say that they had not looked at switching because there were no other alternatives available or that it made no difference (up 4%).
- 5% say that the barriers are too high (too difficult, too time consuming or too difficult to understand), down 7%.

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=139)

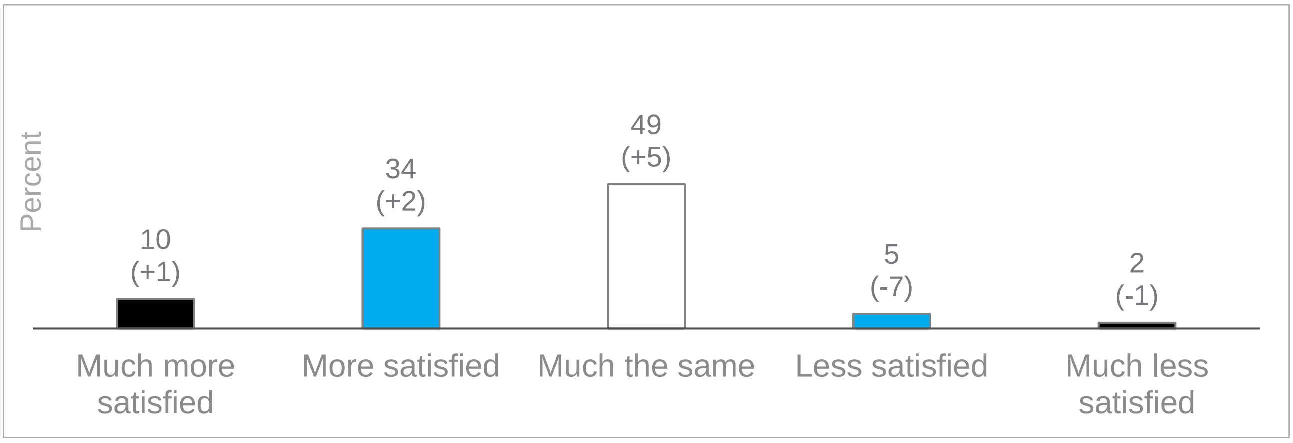
Activity

Satisfaction after considering switching

The proportion of WA household consumers saying that considering switching increased their satisfaction with the value for money they receive at the moment is up marginally since last year's survey.

- 44% now say that looking made them more satisfied, up 3% on this time last year.

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?

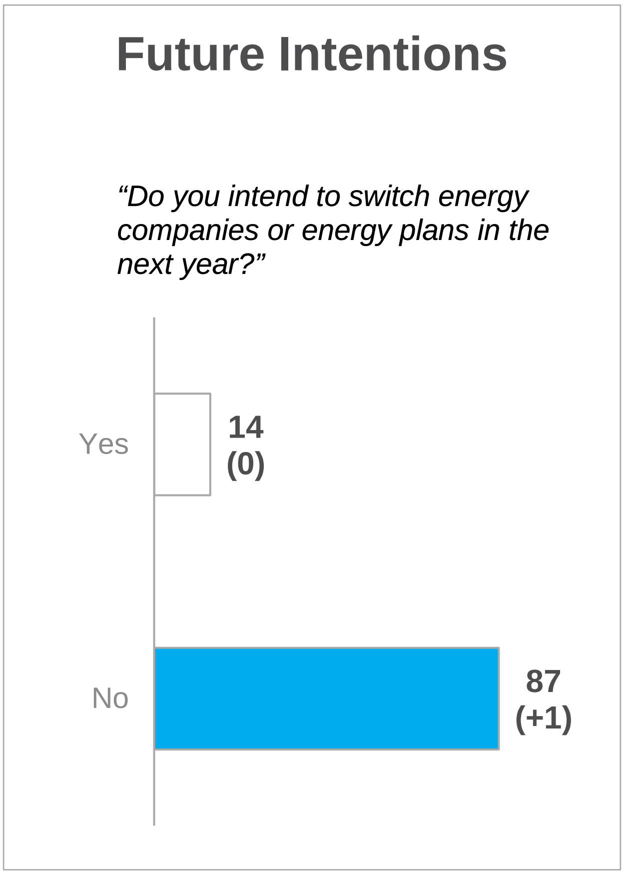


Base: WA household consumers who considered switching in the last 3 years (n=61)

INDICATIVE ONLY: SMALL SAMPLE SIZE

Switching intentions

There was no significant change in the proportion of Western Australian household consumers who say they intend to switch in the year ahead.



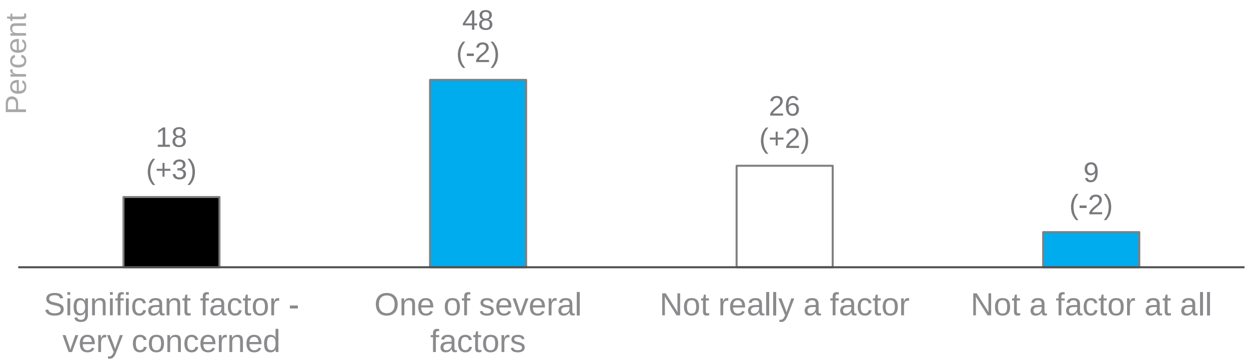
Activity

Consideration of the environment

There was no significant difference in the proportion of Western Australian household consumers in this survey who said that they considered the environment in decisions about energy products and services.

- 66% say that it is one of the most important factors, up 1% on the March / April survey.

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



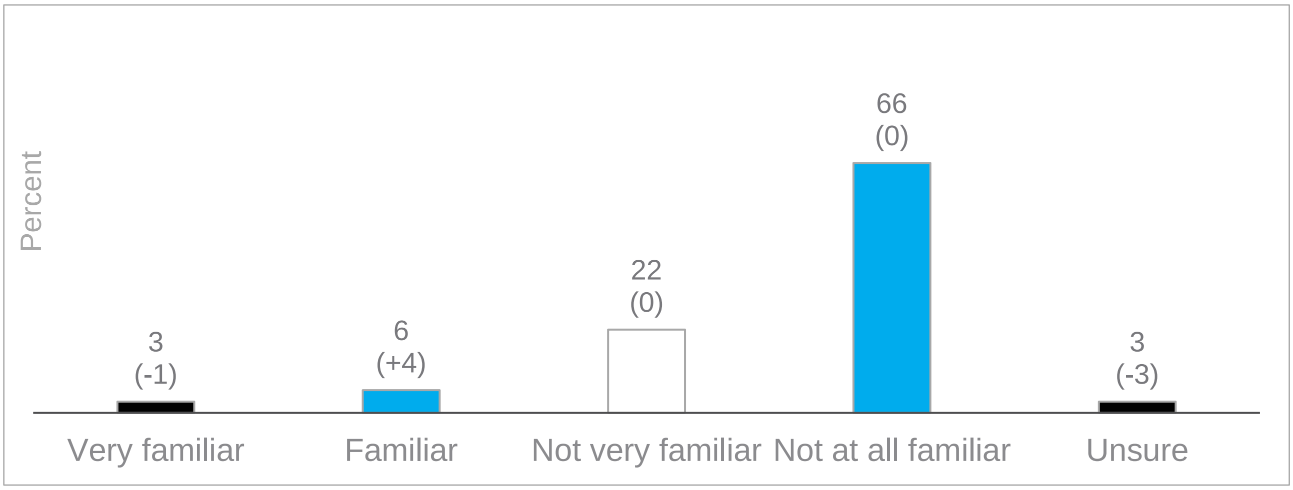
Other

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.

- The proportion claiming to be familiar with ECA is 9%, up 3% from the same time last year.

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



CONFIDENTIAL

Energy Consumers Australia

Energy Consumer Sentiment Survey
April 2017

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

Essential RESEARCH

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)