

The logo graphic consists of a light blue trapezoidal shape on the left, a dark blue triangle at the top right, and a red-orange abstract pattern on the right side.

**AER
Consumer
Reference Group**

CRG Consumer Survey 3

**Update on insights into energy consumers' price - service priorities and
price impacts**

August 2022

Acknowledgement of Country

The National Energy Market, energy users, and the communities in which they reside and work, including those individuals who participated in CRG's consumer surveys, traverse the lands of many Indigenous nations. We recognise the Traditional Owners of these lands and honour their customs and traditions and special relationship with the land as well as those where this report is being prepared. We respect the elders of these nations, past, present and emerging.

Acknowledgements

The CRG's three Consumer Surveys involving several thousand energy consumers were conducted with financial support from Energy Consumers Australia (ECA). We are grateful to the ECA for its support to enable us to gather direct feedback from energy consumers through our consumer surveys. Direct consumer feedback, along with input from consumer representatives and other sources has been invaluable in helping inform our advice to the AER on the making of the 2022 Rate of Return Instrument.

We also thank Jeff Mullins of Indeana for his efficient and effective management of our online survey data collection from energy consumers.

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1 Summary

1.1 Survey 3 overview

In August 2022, the GRG commissioned¹ a *third* online survey (Consumer Survey 3) of residential energy consumers² and commercial consumers.³ The primary aim of this survey was to reassess consumer sensitivity to different price increases, given the changed economic circumstances since August 2021 when we first tested consumer sensitivity to price increases (in Consumer Survey 2).

The resulting sample of 2,501 energy consumers included 1,500 residential energy consumers and 501 commercial consumers. The sample profile is included in Appendix B.

1.2 Key insights this survey

Energy consumers expect their energy prices will increase, and increasingly they anticipate being in financial distress

- Significant proportions of residential and commercial consumers are already having difficulty managing their energy bills, with around 30% of residential and commercial energy consumers reporting difficulties affording to pay their energy bills in the last 12 months
- Nearly 40% are anticipating having difficulties being able to afford to pay their energy bill or any other bills in the next few years (Sections 2 and 4)

Energy consumers' sensitivity to price increases

- Residential and commercial consumers remain sensitive to price increases, as energy prices increase:
 - Fewer consumers respond by “doing nothing” (Sections 5.2.1 and 5.3.1)
 - With small increases, residential consumers are initially most likely to respond by looking at ways to use less energy (Sections 5.2.2), whereas the proportion of commercial consumers and 5.3.2) who are most likely to respond by looking at ways to use less energy is relatively stable (Section 5.3.2)
 - With larger energy price increases consumers increasingly consider ways to invest to reduce their dependence on energy networks (Sections 5.2.3 and 5.3.3)
- August 2022 compared to August 2021:
 - Residential consumers are initially more likely to respond by “doing nothing” (Sections 5.2.1) whereas commercial consumers' behaviour remains relatively unchanged (Section 5.3.1)
 - As prices increase, residential consumers are more likely to look at ways to use less energy than they were in 2021 (Section 5.2.2) whereas commercial consumers' behaviour remains relatively unchanged (Section 5.3.2)
 - With relatively small price increases, residential consumers are more likely to invest to reduce their energy usage compared to 2021 (Section 5.2.3) whereas commercial consumers' behaviour remains unchanged (Section 5.3.3)

¹ With support from Energy Consumers Australia. Details of the survey method are included in the Appendix.

² Approximate residential quotas based on the proportions of households by State, according to the Australian Bureau of Statistics, 2016 *Census of Population and Housing, Table Builder*, while Indiana established the age and gender quotas within each State.

³ In line with Energy Consumers Australia (ECA) small business definition applied to its *Consumer Sentiment Survey*.

Reliability of the network is important but so is the price of network services, particularly for residential consumers

- Residential energy consumers are more likely to be concerned about the cost of energy than they are about having a reliable supply, whereas similar proportions of commercial consumers are concerned about the cost of energy and having a reliable supply (see Section 7)
- Those most focused on the cost of energy are renters, those eligible for concessions on their energy bills, and those who had or anticipate having difficulties paying their bills (see Section 8.2)

Many consumers are at a point of 'despair'⁴

- A significant proportion of residential consumers (22%) and commercial consumers (also 22%) are in longer term financial stress,⁵ and their anticipated actions to reduce their financial stress are often drastic (see examples in Appendix A).
- Some consumers have the capacity to take more action and continue to look at ways to accelerate reduction in their dependence on networked energy (see sections 4.2, 4.2, 5.2.3 and 5.3.3)

⁴ Quadrangle reports similar findings in its recent consumer survey conducted for Citizens Advice and Ofgem, see Quadrangle, *Household Consumer Perceptions of the Energy Market, Research conducted in Q1'22 – March 2022*, Report prepared for Citizens Advice and Ofgem, July 2022

⁵ I.e. they have experienced financial hardship in the last 12 months and anticipate they will struggle to pay their bills at least for the next few years.

2 Who did we survey

We surveyed 2,001 energy consumers within the National Energy Market including 1,500 residential consumers and 501 commercial consumers.⁶

2.1 Residential sample

The residential sample of 1,500 energy consumers was proportionally stratified⁷ with respect to location within the NEM (state/territory and location within the state⁸) as shown in the following table:

Table 2-1: Residential sample by state/territory and location within state/territory

Location within state/territory	Total residential sample (n=1,500)	ACT (n=45)	NSW (n=529)	Vic (n=498)	Qld (n=240)	SA (n=142)	Tas (n=47)
Capital city	55%	96%	49%	59%	46%	67%	36%
Regional city	28%	2%	32%	25%	37%	16%	34%
Small town	7%	0%	8%	7%	7%	6%	9%
Rural area	10%	2%	11%	8%	10%	11%	21%

Other characteristics of the residential sample were:

- Nearly all surveyed residential consumers had electricity connected to their property (96%) and 60% had a gas connection.
- Just over half (56%) were property owners and 44% were tenants
- Most were involved in decisions in relation to the energy supplied to their property (63%)

In terms of **vulnerabilities**:

- 43% indicated their household was eligible for concessions on its energy bills
- 28% indicated they had difficulties being able to afford to pay their energy bill or any other bills in the last 12 months
- 37% anticipate having any difficulties being able to afford to pay their energy bill or any other bills in the next few years
- 73% indicated they have acted in the last few years to reduce their energy bills
- 68% are planning to do act in the next few years to help reduce their energy bills

⁶ Defined as anyone in a management position within a business that employs 200 people or less and who is involved in making decisions about how the business is run.

⁷ Population of households as per the ABS Census 2016 for comparability with previous CRG surveys and data available at the time.

⁸ Capital city, regional city, small town or rural area.

2.2 Commercial sample

The commercial sample of 500 energy consumers was randomly selected across the NEM (state/territory and location within the state⁹). However, as shown in the following table it is broadly consistent with the residential consumer sample distribution.

Table 2-2: Commercial sample by state/territory and location within state/territory

Location within state/territory	Total residential sample (n=501)	ACT (n=13)	NSW (n=184)	Vic (n=191)	Qld (n=67)	SA (n=37)	Tas (n=9)
Capital city	64%	100%	61%	71%	45%	76%	33%
Regional city	25%	0%	28%	18%	40%	16%	44%
Small town	4%	0%	3%	5%	4%	3%	11%
Rural area	7%	0%	8%	6%	10%	5%	11%

Notably the commercial sample of business operators represents a diversity of business sectors, including:

- Professional services (e.g. accountants, lawyers, real estate agents, IT specialists) – 21%
- Retailers – 19%
- Construction and trades – 14%
- Hospitality businesses (cafes, restaurants etc.) – 8%
- Health care and personal services – 6%
- Manufacturers – 6%
- Education and training providers – 6%
- Home based business operators – 3%
- Agriculture – 2%
- Transport – 2%
- Various others – 12%

In terms of **vulnerabilities**:

- 30% indicated they had difficulties being able to afford to pay their energy bill or any other bills in the last 12 months
- 39% anticipate having any difficulties being able to afford to pay their energy bill or any other bills in the next few years
- 68% indicated they have acted in the last few years to reduce their energy bills
- 65% are planning to do act in the next few years to help reduce their energy bills

⁹ Capital city, regional city, small town or rural area.

3 Awareness of the AER

As a basis of sample comparison beyond demographics, in Survey 3 as in Survey 2 participants were asked:

Before you started this survey had you heard of the Australian Energy Regulator?

In Survey 3, awareness of the AER was variable, but greater than in Survey 2:

- 46% of residential consumers indicated they had heard of the Australian Energy Regulator before they started the survey (38% in Survey 3); compared to
- 64% of commercial consumers (62% in Survey 2)

3.1 Understanding of energy regulation

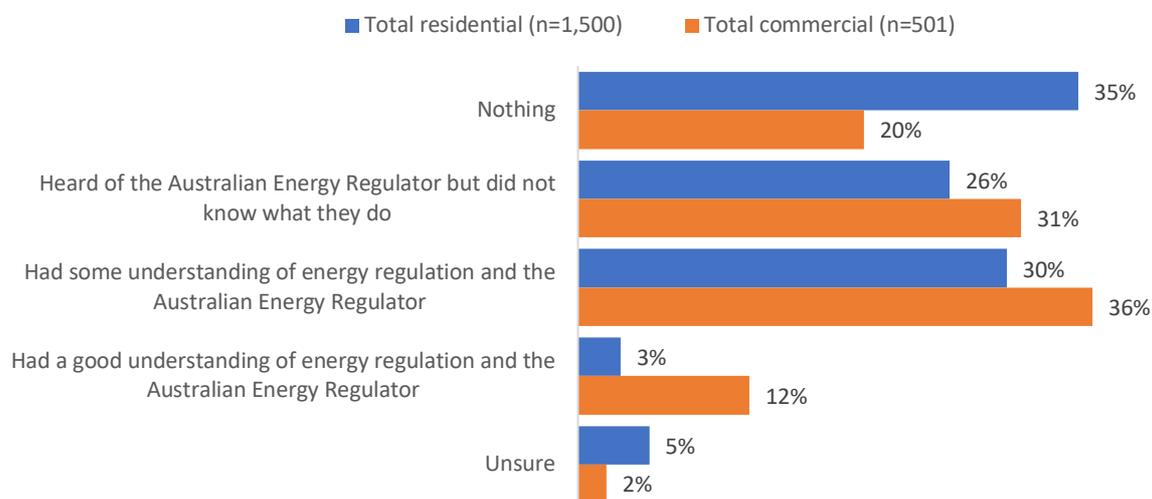
In Survey 3 as in Survey 2 we also further explored energy consumers' understanding of energy regulation, by asking survey participants (regardless of their awareness of the AER):

Before this survey what did you know about energy regulation in Australia?

Relatively small proportions of energy consumers believe they have any understanding of energy regulation in Australia:

- 35% of residential consumers indicated they have no understanding (40% in Survey 2) whereas only 20% of commercial consumers have no understanding (26% in Survey 2)
- Commercial consumers (50%) are more likely than residential consumers (33%) to have some understanding or a good understanding.

Figure 3-1: Energy consumers' self-reported pre-survey understanding of energy regulation in Australia



4 Consumer vulnerability

In this survey we sought to better understand energy consumer vulnerability and the impacts of possible price increases on them.

In addition to establishing whether residential consumers were eligible for concessions on their energy bills, we asked residential and commercial consumers:

- *Over the last 12 months have you/has your business had any difficulties being able to afford to pay your energy bill or any other bills?*
- *In the next few years do you anticipate having any difficulties being able to afford to pay your energy bill or any other bills?*
- *Have you done anything in the last few years to help reduce your energy bills?*
- *Are you planning to do anything in the next few years to help reduce your energy bills?*
 - *What are you planning to do [to reduce your energy bills]?*

4.1 Residential consumers

Among residential consumers a large proportion were eligible for concessions on their energy bills (43%). Significant proportions of energy consumers have experienced financial vulnerability, and are likely to continue to do so:

- 28% indicated they had difficulties being able to afford to pay their energy bill or any other bills in the last 12 months, including:
 - 42% of renters
 - 35% of those who are eligible for concessions on their energy bills
- 37% anticipate having difficulties being able to afford to pay their energy bill or any other bills in the next few years, including:
 - 47% of renters
 - 45% of those who are eligible for concessions on their energy bills
 - **80% of consumers** who have already had difficulties being able to afford to pay their energy bill or any other bills in the last 12 months also anticipate having any difficulties being able to afford to pay their energy bill or any other bills in the next few years (**i.e. 22% of all residential consumers continue to be stressed financially over multiple years**)

Regardless of whether they have experienced difficulties being able to afford to pay their energy bill or any other bills in the last 12 months, or anticipate difficulties in the future most residential consumers are actively trying to reduce their energy bills, and/or are planning to do so:

- 73% indicated they have acted in the last few years to reduce their energy bills, including:
 - 75% of property owners and 71% of renters
 - 78% of those who are eligible for concessions on their energy bills
 - 83% of those who had difficulties being able to afford to pay their energy bill or any other bills in the last 12 months

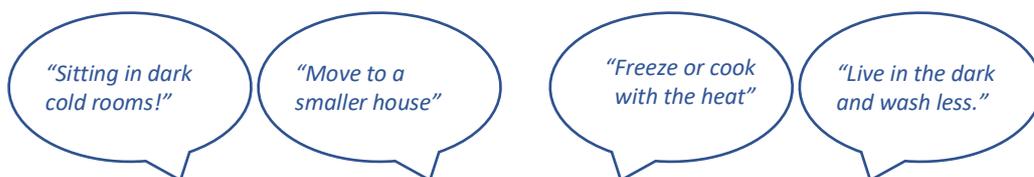
- 83% of those who anticipate having difficulties being able to afford to pay their energy bill or any other bills in the next few years
- 68% are planning to act in the next few years to help reduce their energy bills, including:
 - 68% of property owners and 69% of renters
 - 71% of those who are eligible for concessions on their energy bills
 - 81% of those who had difficulties being able to afford to pay their energy bill or any other bills in the last 12 months
 - 80% of those who anticipate having difficulties being able to afford to pay their energy bill or any other bills in the next few years (**i.e. 22% of all commercial consumers continue to be stressed financially over multiple years**)

Although 32% of energy consumers are planning to do nothing, many residential consumers are planning a range of actions to help reduce their energy bills:

- Generally, be more energy efficient – 18%
- Look at ways to use less energy – 15%
- Install or expand their rooftop solar – 15%
- Consider or invest in more energy-efficient appliances – 15%
- Use less heating/cooling/turn off heater – 7%
- Turn off lights – 6%
- Invest in a battery to store excess energy – 5%
- Switch energy provider – 5%

The above actions are a coded summary of energy consumers' verbatim responses. Some of their direct comments on their "proposed" actions illustrate limited opportunities for some residential consumers to take any further actions:¹⁰

Figure 4-1: Sample of residential consumers' proposed actions to help reduce their energy bills



¹⁰ Additional examples of "drastic" actions are included in the Appendix.

4.2 Commercial consumers

Like residential consumers, significant proportions of commercial consumers have experienced financial vulnerability, and are likely to continue to do so:

- 30% indicated they had difficulties being able to afford to pay their energy bill or any other bills in the last 12 months, this includes:
 - 32% of commercial business operators who own their business premises and 27% whose business rents the premises
- 39% anticipate having difficulties being able to afford to pay their energy bill or any other bills in the next few years, including:
 - 41% of commercial business operators who own their business premises and 36% whose business rents the premises
 - **76% of commercial consumers** who have already had difficulties being able to afford to pay their energy bill or other bills in the last 12 months also anticipate having any difficulties being able to afford to pay their energy bill or any other bills in the next few years this equates to 23% of all commercial consumers)

Regardless of whether they have experienced difficulties being able to afford to pay their energy bill or any other bills in the last 12 months, or anticipate difficulties in the future most commercial consumers are actively trying to reduce their energy bills, and/or are planning to do so:

- 68% indicated they have acted in the last few years to reduce their energy bills, including:
 - 73% of property owners and 64% of renters
 - 82% of those who had difficulties being able to afford to pay their energy bill or any other bills in the last 12 months
 - 80% of those who anticipate having difficulties being able to afford to pay their energy bill or any other bills in the next few years
- 65% are planning to act in the next few years to help reduce their energy bills, including:
 - 65% of property owners and renters
 - 74% of those who had difficulties being able to afford to pay their energy bill or any other bills in the last 12 months
 - 73% of those who anticipate having difficulties being able to afford to pay their energy bill or any other bills in the next few years

Although 37% of energy consumers are planning to do nothing, many commercial consumers are planning a range of actions to help reduce their energy bills:

- Install or expand their rooftop solar – 24% (24% of property owners and 23% of renters)
- Generally, be more energy efficient – 17%
- Consider or invest in more energy-efficient equipment – 10%
- Look at ways to use less energy – 8%
- Switch energy provider – 7%
- Use less heating/cooling/turn off heater – 5%

- Turn off lights – 5%
- Invest in a battery to store excess energy – 5%

5 Comparing energy consumers' responses to price changes over time

5.1 Context

To inform our advice to AER's July 2021 Draft Working Papers: The Overall rate of return, Debt omnibus and Equity omnibus papers we were particularly interested to better understand consumers' sensitivity to price *increases*, so in Consumer Survey 2, participants were asked the following question, in either ascending or descending order of price increase:

If the price you pay for energy increased by 1%/2%/5%/10%/15% and 30%, how would you most likely react? or

If the price you pay for energy increased by 30%/15%/10%/5%/2% and 1%, how would you most likely react?

They were provided with a list of possible responses:

- *Do nothing*
- *Look at ways to use less energy*
- *Consider or invest in more energy-efficient appliances/equipment*
- *Consider or invest in alternative energy*
- *Install or expand your rooftop solar*
- *Other*
- *Unsure*

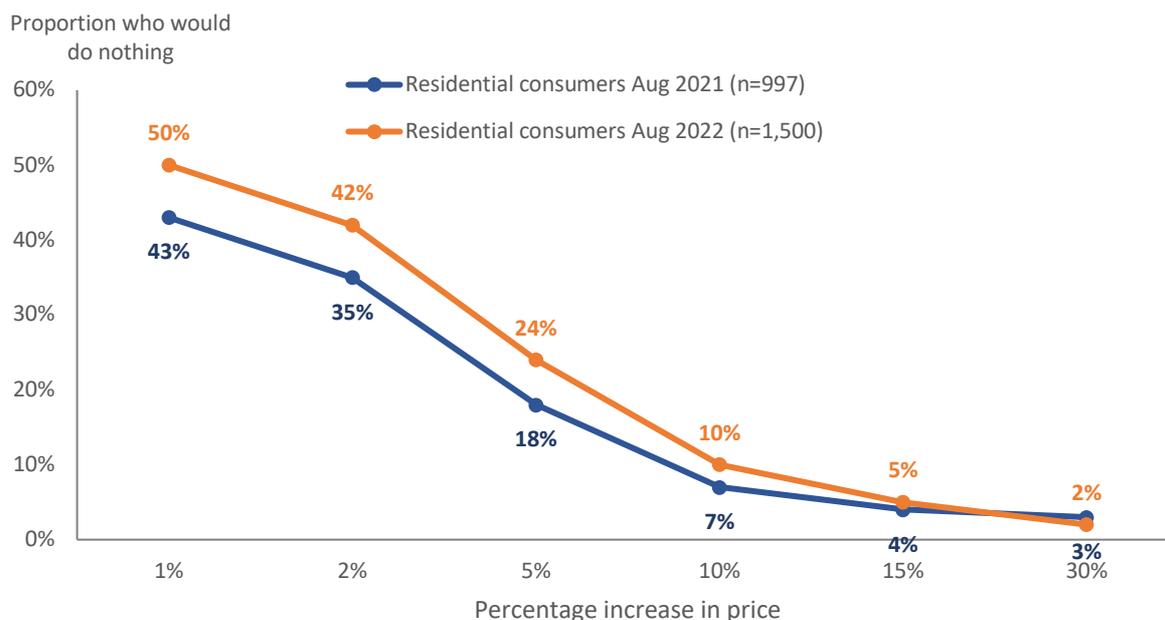
We repeated the same question in this survey, adding in "Investing in a battery to store your excess energy if you have any".

5.2 Residential consumers

5.2.1 Residential consumers who would “do nothing”

With a 1% price increase 43% of residential consumers in 2021 and 50% in 2022 indicated they would do nothing, i.e., the majority believe they would react in some way to even a small price increase. As shown below, the larger the price increase the less likely that energy consumers would “do nothing”, regardless of the year.

Figure 5-1: Residential consumers’ who would “do nothing”

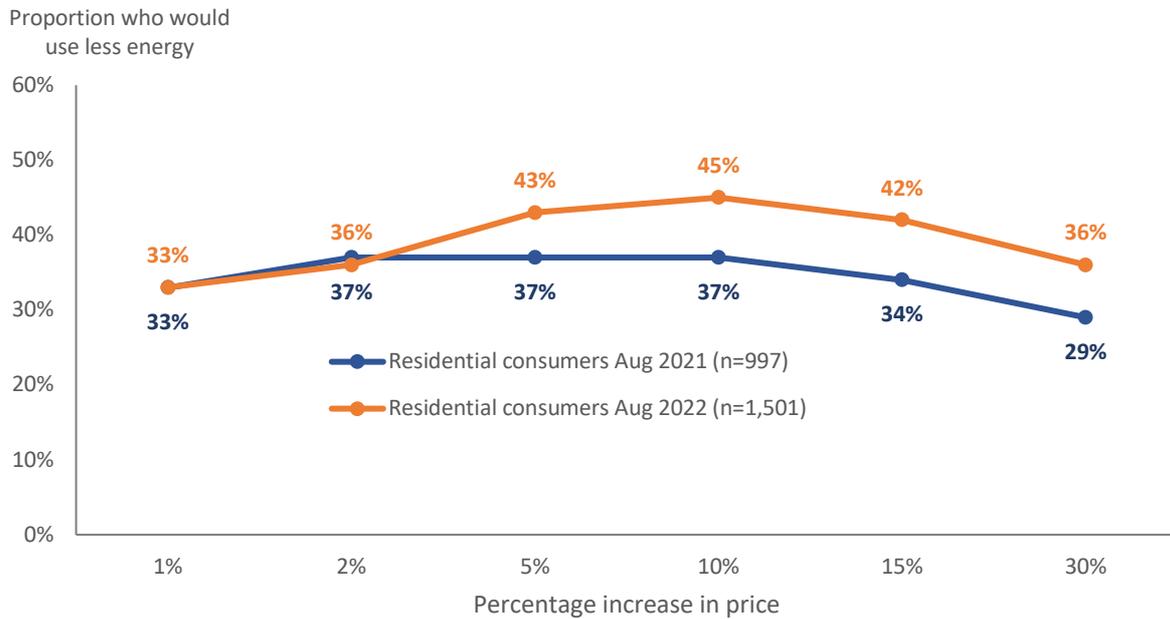


5.2.2 Residential consumers who would look at ways to use less energy

In the August 2021 survey, as the price starts to increase consumers initially indicated they would look at ways to reduce their energy use. In the 2021 survey, from a 2% to 10% increase the proportion of residential consumers who would look at ways to reduce their energy use was stable then decreased. However, in this survey, residential consumers were increasingly likely to look at ways to use less energy to a high of 45% if the price of energy increased by 10%.

As shown below, for small price increases comparable proportions of residential consumers indicated they would look at ways to use less energy. If the price of energy increased by 5% or more, in this survey a consistently larger proportion indicated they would look at ways to use less energy.

Figure 5-2: Residential consumers' who would "look at ways to use less energy"



5.2.3 Residential consumers who would "invest"

In both surveys, as the price starts to increase, increasing proportions of consumers indicated they would invest to reduce their energy use. However, in this survey, slightly smaller proportions indicated they would invest at all price increase points.

Figure 5-3: Residential consumers who would "invest"

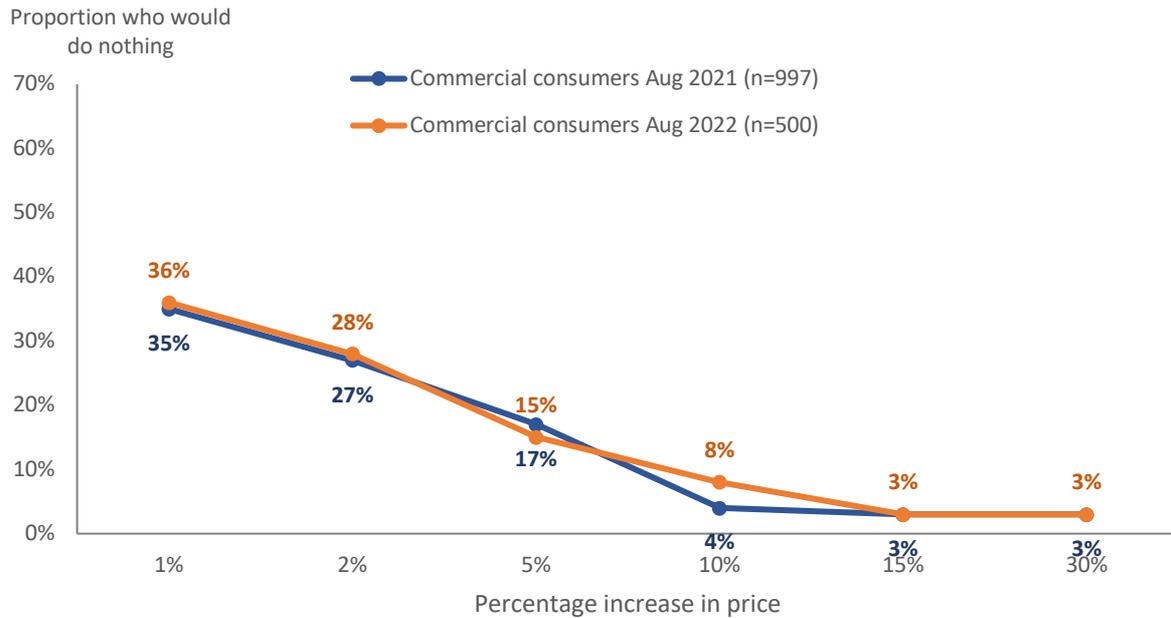


5.3 Commercial consumers

5.3.1 Commercial consumers who would “do nothing”

As shown below, the larger the price increase the less likely that commercial consumers would “do nothing”, regardless of the year. Even with a 1% price increase a minority of commercial consumers (35% in 2021, 36% in 2022) indicated they would do nothing, i.e., the majority believe they would react in some way to even a small price increase.

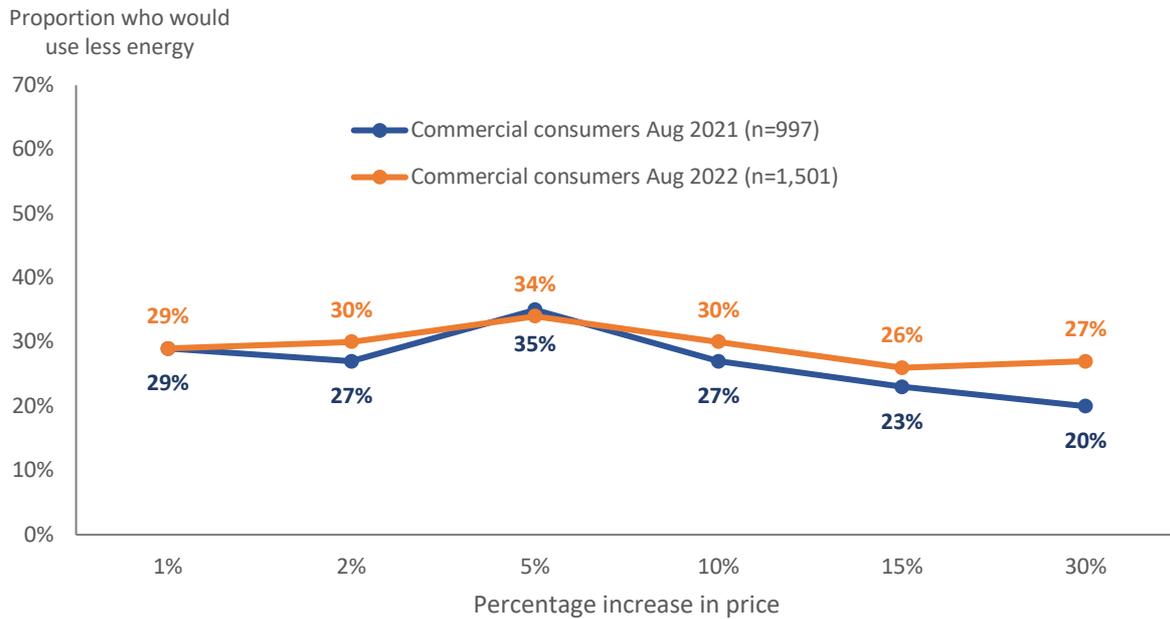
Figure 5-4: Commercial consumers’ who would “do nothing”



5.3.2 Commercial consumers who would look at ways to use less energy

In the August 2021 survey, as the price starts to increase consumers initially indicated they would look at ways to reduce their energy use. In the 2022 survey the proportion of commercial consumers who would look at ways to reduce their energy use was stable regardless of the price increase.

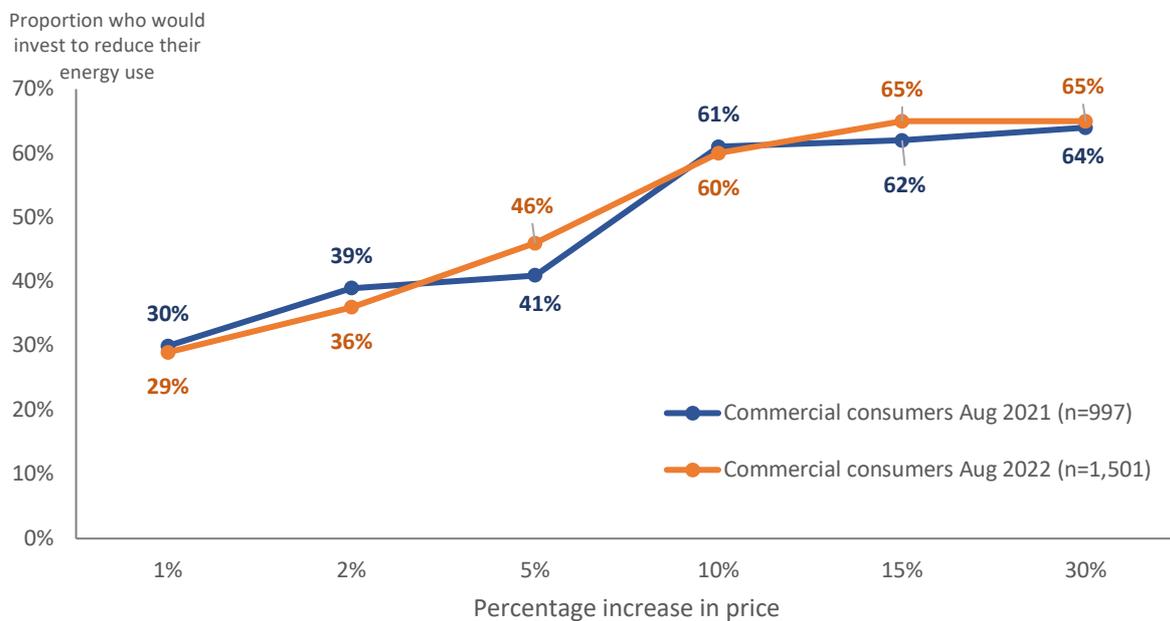
Figure 5-5: Commercial consumers who would “look at ways to use less energy”



5.3.3 Commercial consumers who would “invest”

In both surveys, as the price starts to increase, increasing proportions of commercial consumers indicated they would invest to reduce their energy use. As shown below, this surveys results for commercial consumers were similar at all price increase points.

Figure 5-6: Commercial consumers who would “invest”



6 An overall look at intended responses to price increases

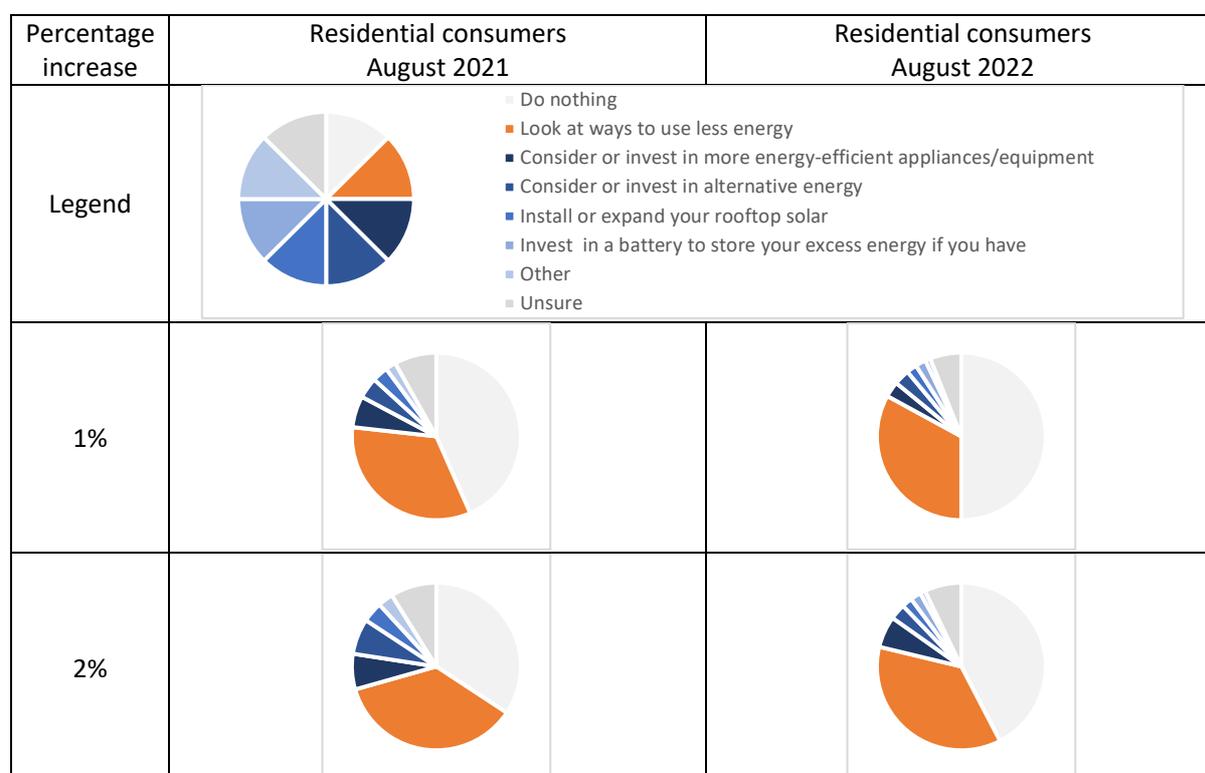
6.1 Residential consumers

The following figure compares residential consumers' likely responses to different percentage increases in the price they pay for energy as at August 2021 and August 2022. In 2021, the key message was as the price increases consumers are likely to respond by initially looking at ways to use less energy (orange pie segments), then as the percentage increase gets larger, they consider more significant actions involving a financial investment (blue segments) including investing in alternative energy, installing or expanding their rooftop solar.

Notably, the proportions of residential consumers who are likely to “do nothing” in response to even a 1% increase in the price of energy is larger than in 2021. For example, in August 2021, 43% indicated they would do nothing if the price of energy increased by 1%, compared to 50% in August 2022. However, the proportions of consumers who would look at ways to use less energy is relatively stable. In contrast the proportions of residential consumers who would “invest”¹¹ in response to price increases has diminished at all price points this survey.

Based on the evidence presented in Section 4, it is reasonable to hypothesise that affordability issues have diminished the ability of many consumers to invest in more energy efficient appliances or alternative energy sources, so the only choices left are to do nothing or continue to look at ways to use less energy (such as those listed in Section 4).

Figure 6-1: Residential consumers' most likely responses to energy price increases (August 2021 and 2022)



¹¹ “Invest” includes considering or investing in more energy-efficient appliances/equipment, considering or investing in alternative energy, installing or expanding rooftop solar, and investing in a battery to store excess energy



6.2 Commercial consumers

The following figure compares commercial consumers' likely responses to different percentage increases in the price they pay for energy as at August 2021 and August 2022. As with residential consumers, in 2021, the key message was as the price increases consumers are likely to respond by initially looking at ways to use less energy (orange pie segments), then as the percentage increase gets larger, they consider more significant actions involving a financial investment (blue segments) including investing in alternative energy, installing or expanding their rooftop solar.

Notably, among commercial consumers the proportion who are likely to "do nothing", "look at ways to reduce their energy use" or "invest"¹² at each price point is relatively stable, when comparing the results from last survey and this survey.

¹² See note 9.

Figure 6-2: Commercial consumers' likely responses to energy price increases (August 2021 and 2022)

Percentage increase	Commercial consumers August 2021		Commercial consumers August 2022	
Legend	<ul style="list-style-type: none"> Do nothing Look at ways to use less energy Consider or invest in more energy-efficient appliances/equipment Consider or invest in alternative energy Install or expand your rooftop solar Invest in a battery to store your excess energy if you have Other Unsure 			
1%				
2%				
5%				
10%				
15%				
30%				

7 Importance of price and reliability

In Consumer Survey 3, we asked consumers the following two questions (randomising the order they were asked, to remove any potential for ordering bias):

- *How concerned are you about having a reliable supply of energy [to your business]?*
- *How concerned are you about the cost of energy [to your business]?*
- Overall, as shown in the following charts, residential energy consumers are more likely to be concerned about the cost of energy than they are about having a reliable supply, whereas similar proportions of commercial consumers are concerned about the cost of energy and having a reliable supply.

Figure 7-1: Residential consumer concerns about reliability and energy costs

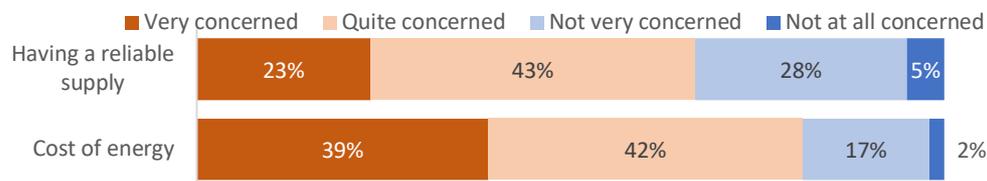
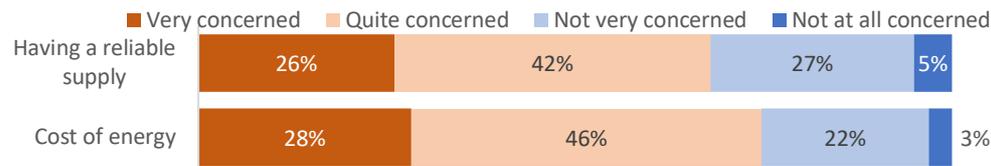


Figure 7-2: Commercial consumer concerns about reliability and energy costs



8 Price-reliability trade off

8.1 Context

A key issue in considering the long-term interests of energy consumers is the trade-off between “affordability” of services and the “reliability” of supply, such that the more reliable supply energy consumers demand the more it is likely to increase the cost to supply. The CRG acknowledges the reality of this trade-off is not straightforward nor is the relationship necessarily directly linear.

Nevertheless, to understand energy consumers’ priorities, they were presented with a nine-point “slider” question:

Thinking about your electricity and/or gas and the price you pay, to what extent do you prefer a highly reliable energy supply over affordable energy?



To reduce any bias, the question was randomly transposed among survey participants, i.e.

Thinking about your electricity and/or gas and the price you pay, to what extent do you prefer a affordable energy over a highly reliable energy supply?



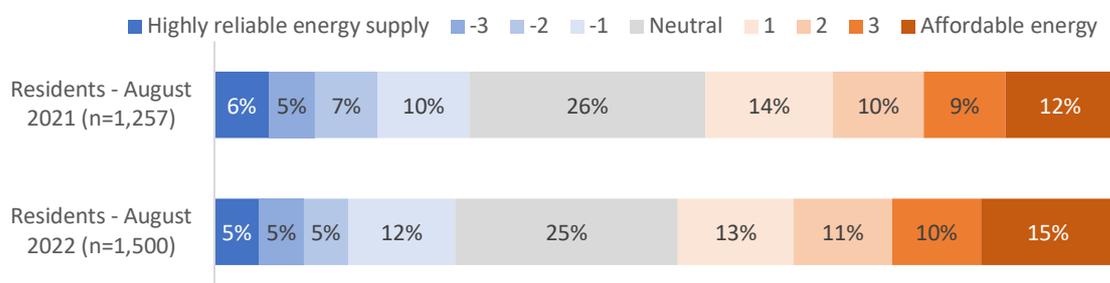
We first tested this relationship in our June 2021 Consumer Survey (Survey 1), and subsequently in Consumer Survey 2 in August 2021. This survey we used the same approach.

8.2 Residential consumers

As shown in Figure 7-1, residential consumers continue to favour affordable energy over a highly reliable supply, with a slightly larger proportion favouring price over reliability this survey:

- In 2021, 28% favoured reliability compared to 45% who favoured price
- This survey, 27% favoured reliability compared to 49% who favoured price

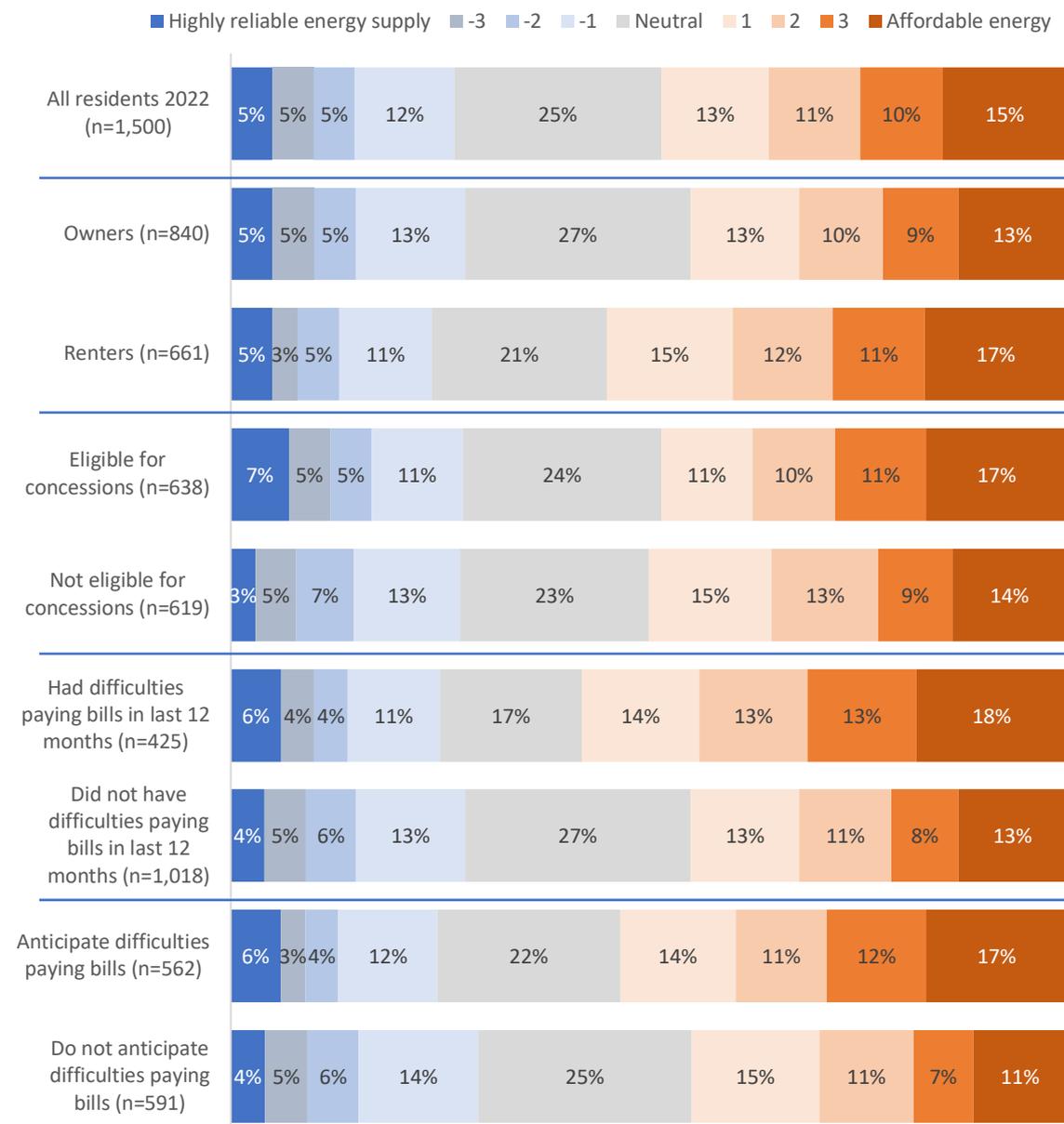
Figure 8-1: Trade-off between affordability of energy and reliability of service, 2021 and 2022



The following figure compares the price-reliability trade-off among different consumer groups and highlights the greater emphasis on price among vulnerable consumers, i.e. the following residential consumer groups most significantly favour price over reliability:

- Renters: 24% favoured reliability compared to 55% who favoured price
- Those eligible for concessions on their energy bills: 28% favoured reliability compared to 49% who favoured price
- Those who had difficulties paying their bills in the last 12 months: 25% favoured reliability compared to 58% who favoured price
- Those who anticipate difficulties paying their bills in the next few years: 29% favoured reliability compared to 54% who favoured price

Figure 8-2: Trade-off between affordability of energy and reliability of service 2022, by consumer group

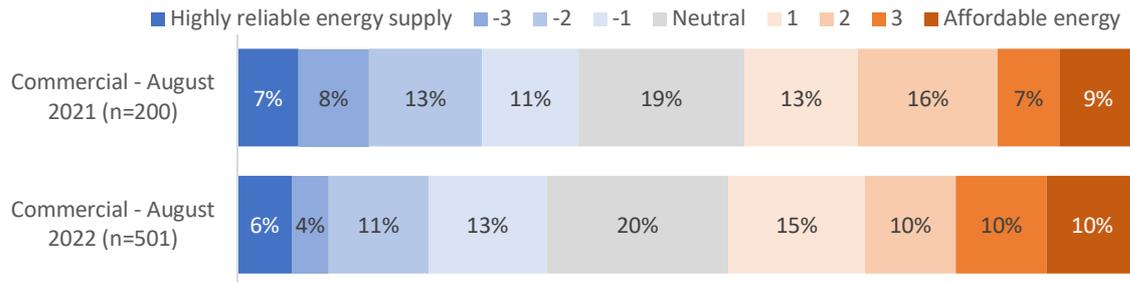


8.3 Commercial consumers

As shown in Figure 7-3, commercial consumers continue to favour affordable energy over a highly reliable supply, although not to the same extent as residential consumers. Regardless a slightly smaller proportion favour price over reliability this survey:

- In 2021, 39% favoured reliability compared to 45% who favoured price
- This survey, 34% favoured reliability compared to 45% who favoured price

Figure 8-3: Trade-off between affordability of energy and reliability of service, 2021 and 2022



Compared to August 2021, commercial customers are also increasingly becoming more focused on affordable energy and are more likely to be prepared to trade off a highly reliable supply for affordable energy.

Appendix: Examples of anticipated actions among financially stressed consumers

The following are verbatim examples of “drastic” responses from energy consumers who indicated they are planning actions to help reduce their energy bills:

- “Apply for a voucher from the state government and ask my energy retailer for a payment plan. Not use a heater, turn off appliances at the source when not using them, I live in a unit and my building doesn't have solar panels.”
- “Cut back on heating and basically freeze to death due to energy costs.”
- “Downsize and install solar panels and battery in new property.”
- “Eat less. Disable all electric equipment.”
- “Ensure lights are always off and use heater if only absolute necessary.”
- “Find a new home with solar.”
- “Freeze or cook with the heat.”
- “Get rid of fish tanks”
- “I'm trying to use very little energy. I don't use lights.”
- “Less heat, less showers, less entertainment and less food.”
- “Move to other place, because we are in a unit where we are not able to choose the provider.”
- “Moving into a tent.”
- “Not use a heater and freeze.”
- “Put more clothes and not use my heating.”
- “Sitting in dark cold rooms!”
- “Stop eating.”
- “Use blankets for heating.”
- “Use no heating no lights shower every second day.”
- “Using less of heating and things like that.”
- “Work two jobs”