

# Energy Consumers Australia

Energy Consumer  
Sentiment Survey  
December 2019

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# Notes on methodology

**This online survey was in the field from 20 September to 10 October 2019.**

**The survey fieldwork was conducted by Qualtrics using participants from online research panels.**

**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 placed on the consumer sample by age and gender, and business sample by business size. The final data was weighted based on ABS data by state, territory and participant type.**

**This is the eighth wave of a biannual survey. The report shows both the results for this survey and the changes in the results between this wave and the sixth wave, reported in December 2018.**

- We compare results with the same survey last year rather than with the most recent survey because of a potential seasonal effect in the data noted in the early waves of this survey. The tendency was for satisfaction measures to improve in summer (autumn data collection, odd numbered waves) and deteriorate in winter (spring data collection, even numbered waves).

**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.**

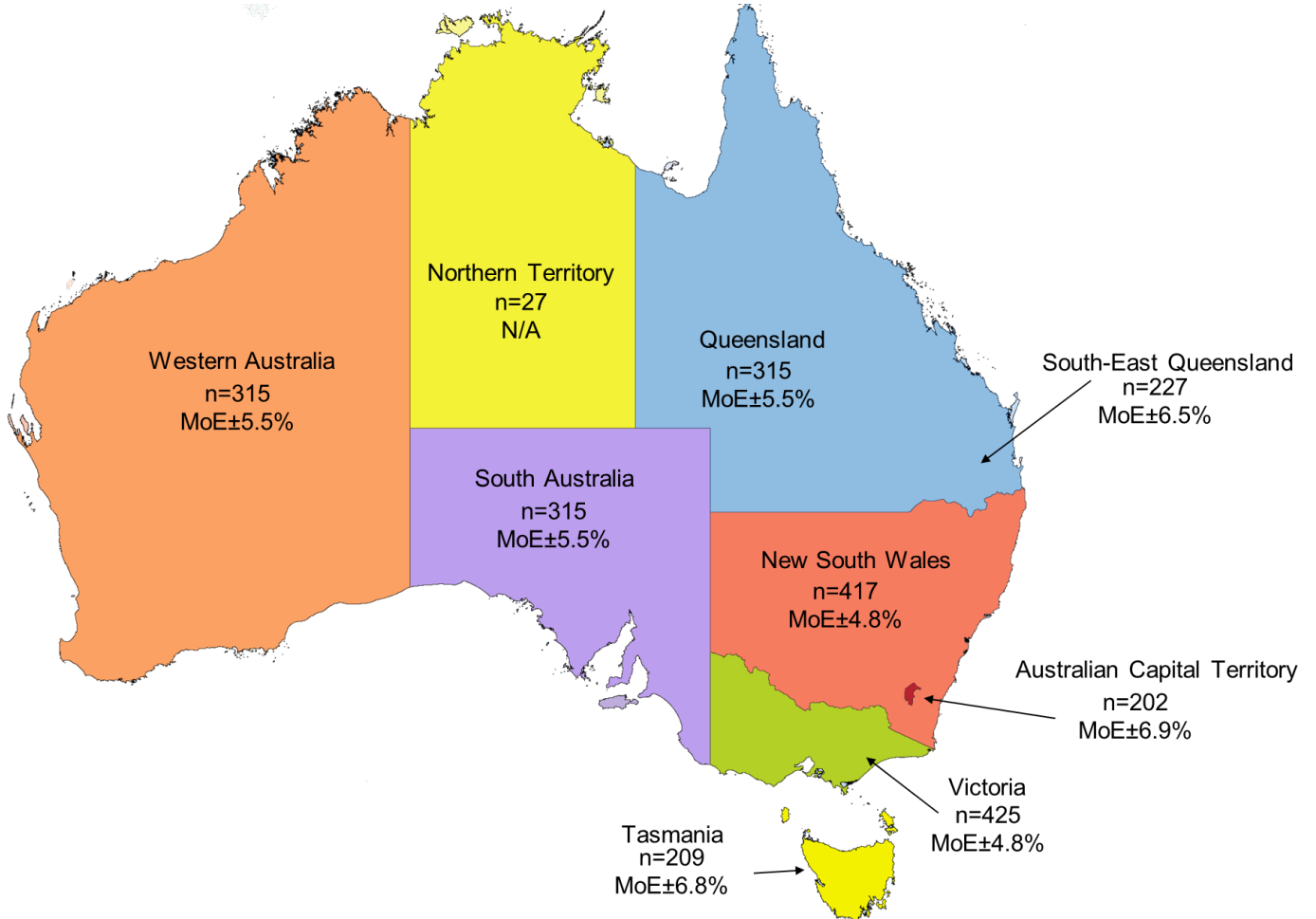
- This represents the combined result for all household consumers, reported as a weighted average using the sample size for each jurisdiction as a proportion of the national total.

- 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 the ACT) relative to others (especially New South Wales and Victoria) on a population basis.

**Data labels show the current result, and then the change since the results reported in December 2018 in brackets.**

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

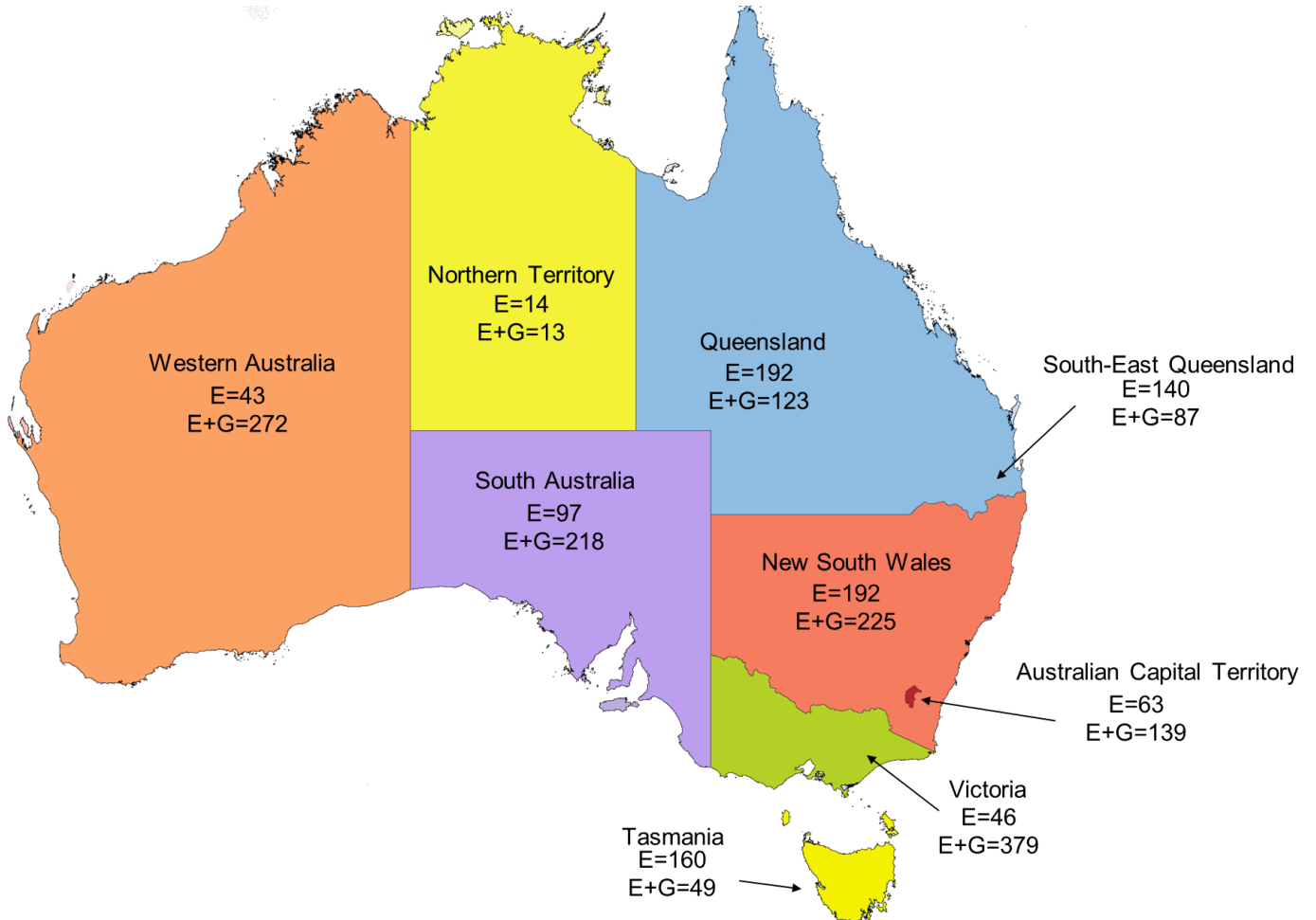
# Samples by state and territory



## Plus nationwide:

Businesses with less than 200 employees  
N=524, MOE\* = ±4.3%  
(MOE = Margin of Error)  
\* 'All Qld' includes SEQ

# Samples by energy types



**KEY**

**E** Only electricity

**E+G** Electricity and gas

## Plus nationwide:

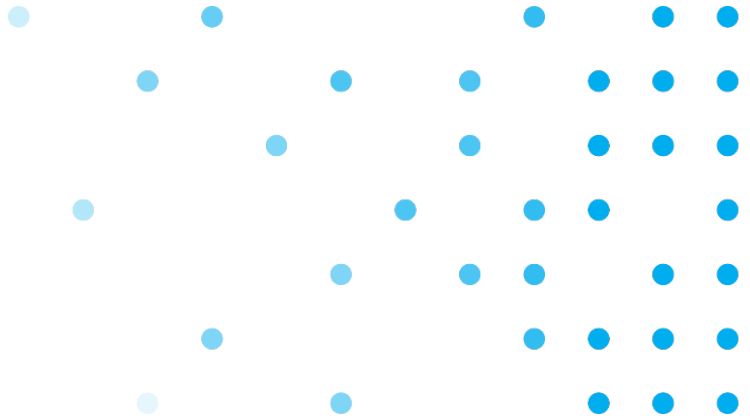
Businesses with less than 200 employees

E (N=169)

EG (N=355)

\* 'All Qld' includes SEQ

# Summary Findings



## Summary of key findings

**Overall satisfaction and satisfaction with value for money have continued their general upward trends, from a low base, over the past 24 months.**

- Household satisfaction with the value for money of electricity increased in all markets (most notably up 22% in ACT, 13% in Tasmania and 9% in Victoria).
- Household satisfaction with value for money of gas increased in all markets except Queensland and Tasmania.
- Household satisfaction with value for money still lags other satisfaction measures across both fuels and all markets.

**Household satisfaction with the value for money of electricity and gas has narrowed the gap to all other comparable services in each state and territory (with the exception of gas in Queensland and Tasmania).**

- Electricity remains behind all comparable services but satisfaction with the value for money of gas is now generally ahead of insurance and closing on internet and water. In Western Australia, gas leads all comparable services.

**Satisfaction with reliability of energy services is generally still very high.**

- Small business satisfaction with reliability was stable (up 1%) at a level significantly below households' satisfaction with reliability.

**Household and small business confidence that the energy market is working in their long-term interest remains low compared to other confidence and satisfaction measures.**

- Around one in three households say they are confident that the market is working in the long-term interests of consumers.
- Consumers have become more confident that the market will deliver better value for money in the future – however, confidence in future value for money remains below 50% across all markets and lags other measures of confidence.



**Small business satisfaction with value for money of electricity and gas continued to rise, with both measures reaching the highest levels across the eight waves of the survey.**

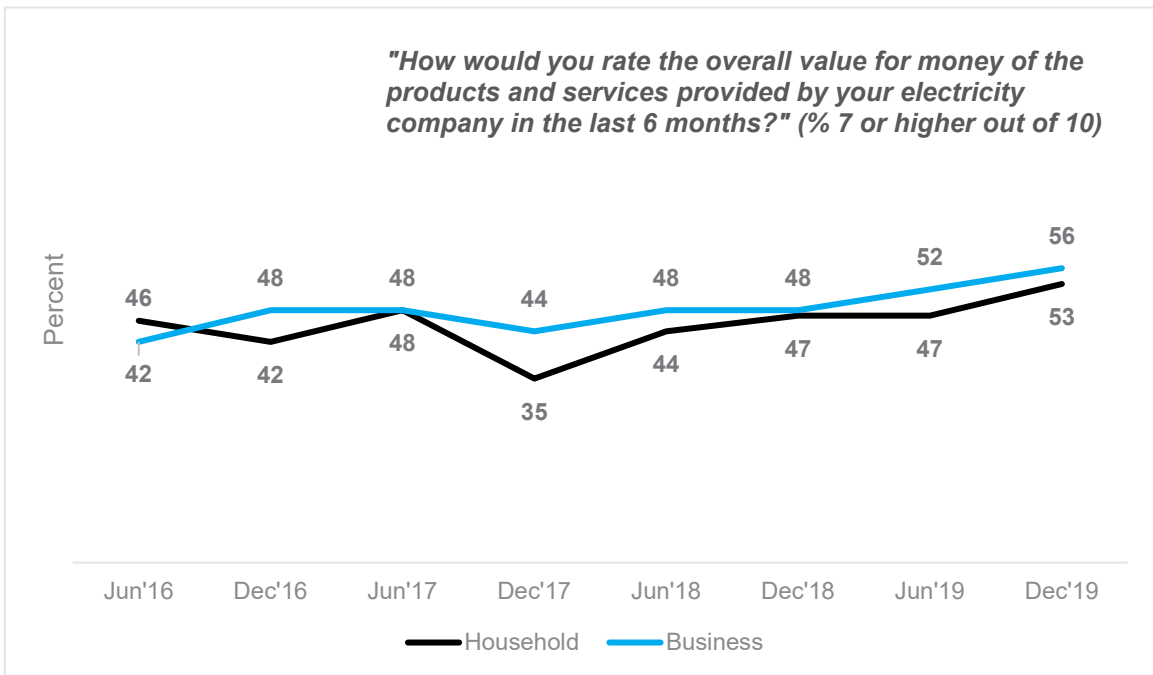
- Most measures of small business satisfaction and confidence rose but small business confidence in the market fell to 41% (down 5%).

# Trends

## Long-term findings

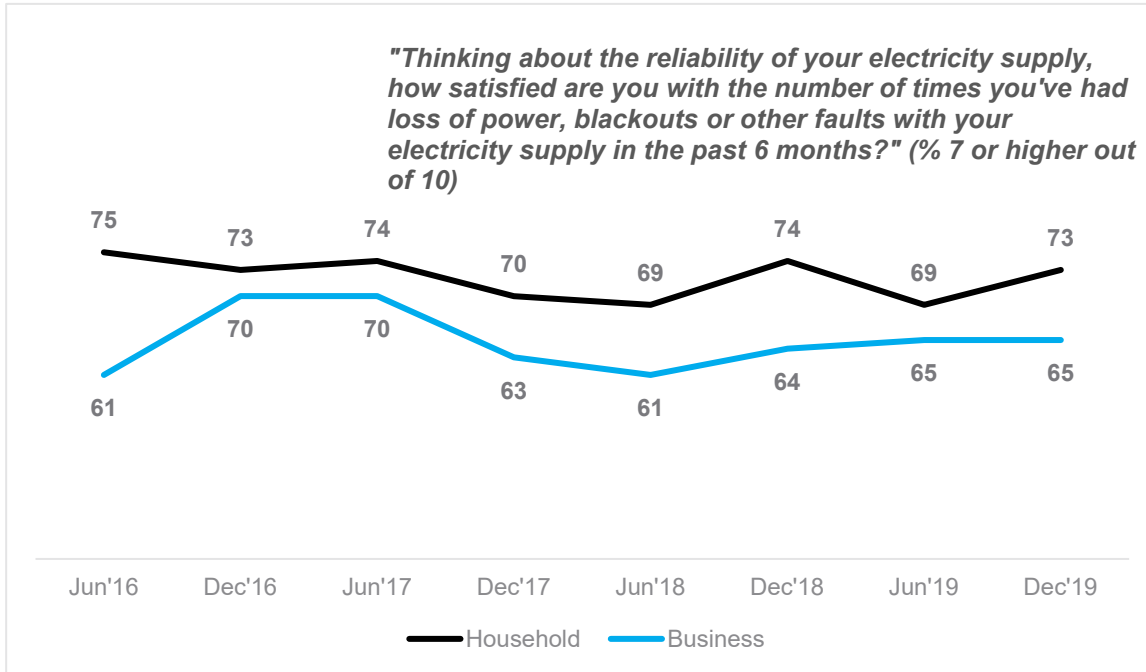
Household satisfaction with the value for money of their electricity service is up 6% to 53% - continuing the upward trend seen over the past 24 months and reaching the highest rating since tracking started three and half years ago.

Overall satisfaction with value for money from electricity companies has increased for small business consumers by 8% since this time last year to 56% - the highest rating since tracking started.



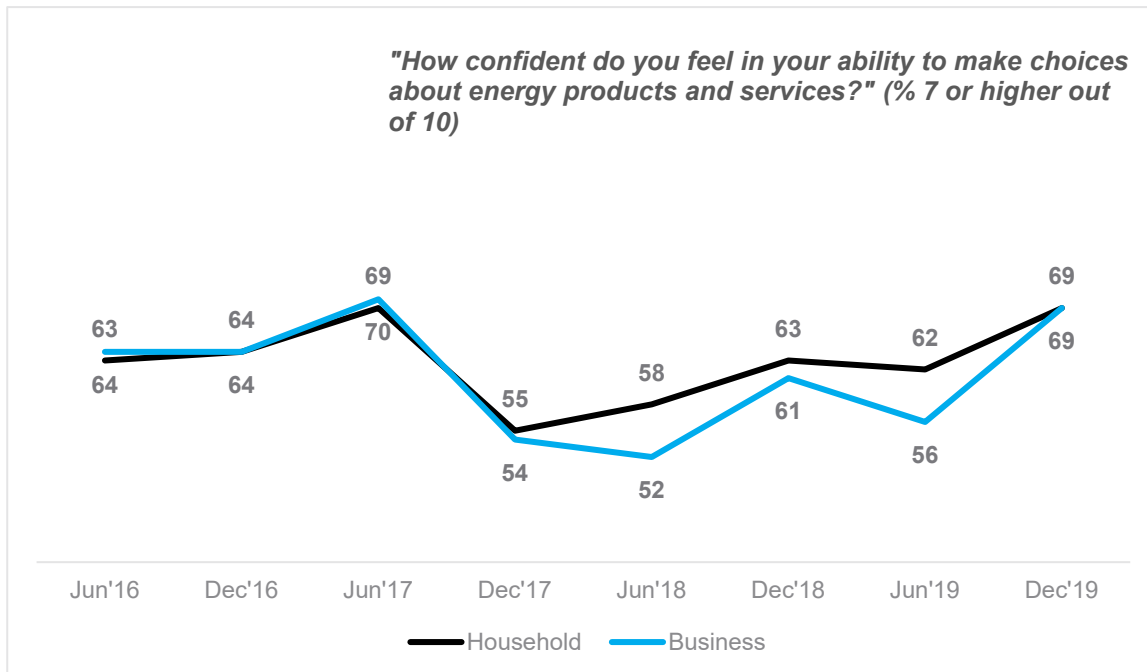
Base: All Household (n=2,225) & Business consumers (n=524)

Satisfaction with the reliability of electricity supply is stable. The proportion of households satisfied moved from 74% to 73% and small business moved from 64% to 65%.



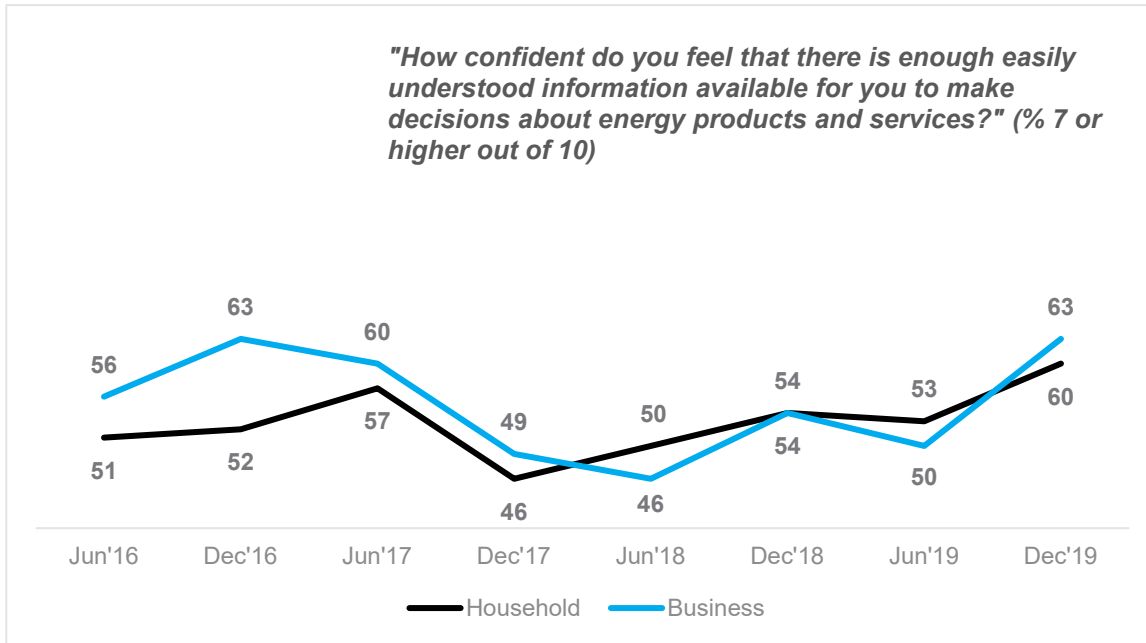
Base: All Household (n=2,225) & Business consumers (n=524)

Household confidence in their ability to make energy choices has increased by 6% from 63% to 69%. Small businesses confidence has similarly increased from 61% to 69%.



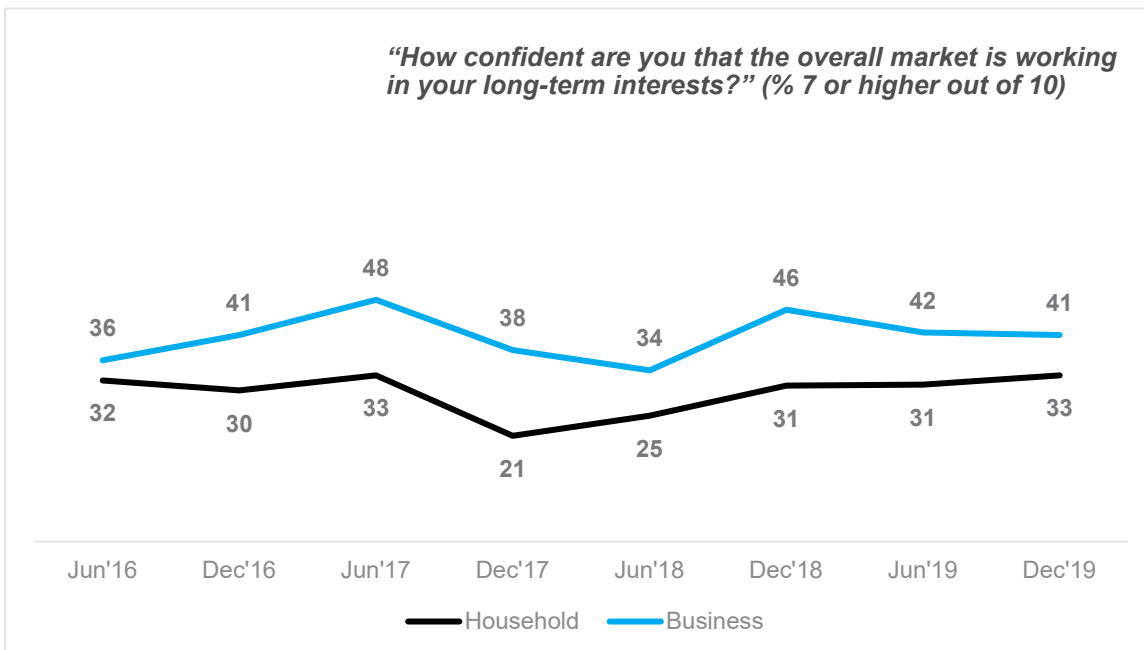
Base: All Household (n=2,225) & Business consumers (n=524)

Confidence in the availability of information has increased among households from 54% to 60%, while confidence amongst small businesses has increased from 54% to 63%.



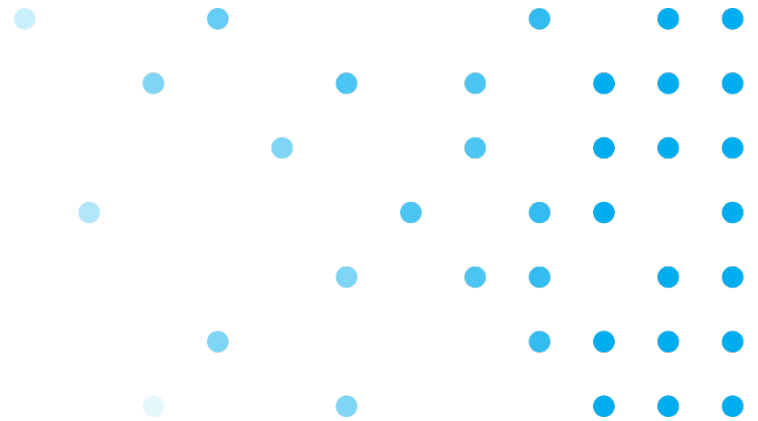
Base: All Household (n=2,225) & Business consumers (n=524)

Household confidence that the energy market is working in the long-term interests of consumers has increased slightly from a low base since results reported in December 2018 (31% to 33%). Confidence among businesses has fallen by 5% to 41%.



Base: All Household (n=2,225) & Business consumers (n=524)

# National findings



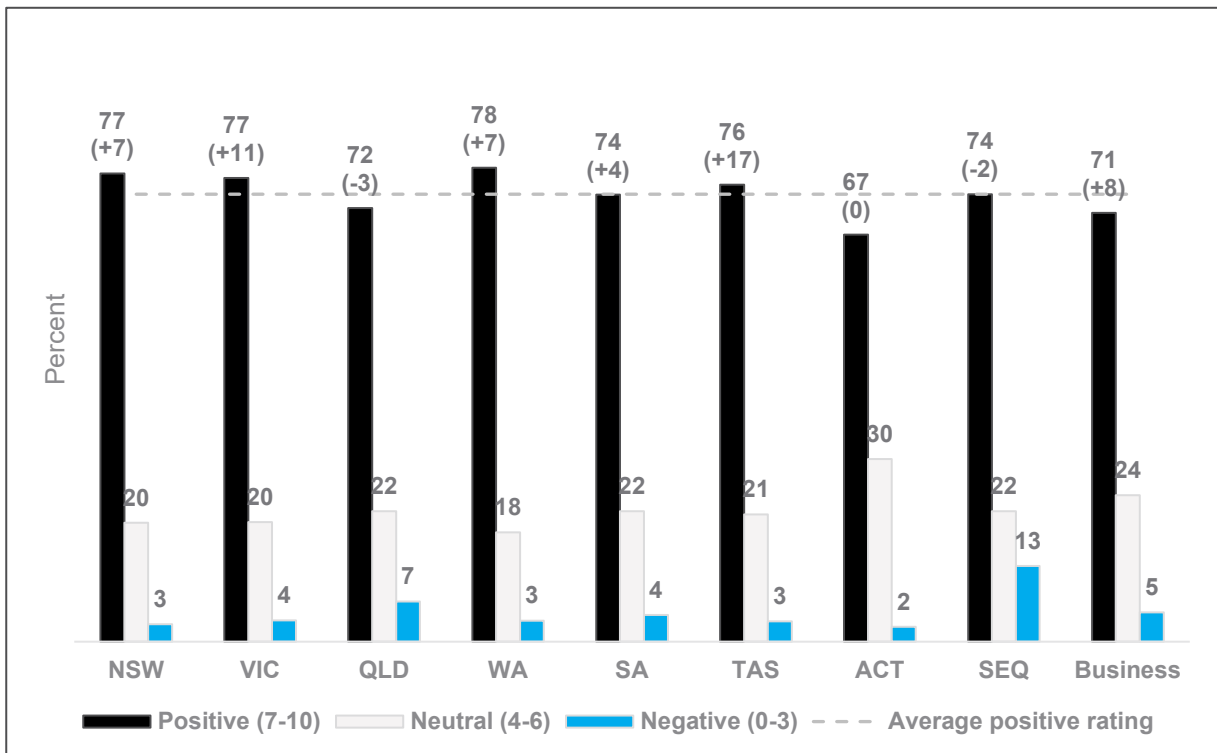
Satisfaction

### Overall satisfaction

Overall satisfaction with the provision of electricity and gas services is up in most states and territories, and among small business consumers.

- The largest increases were in Tasmania (up 17% to 76%) and in Victoria (up 11% to 77%).
- Satisfaction among small business consumers increased by 8% to 71%.
- Satisfaction decreased in South East Queensland (down 2% to 74%), which drove the fall in Queensland overall (down 3% to 72%).

**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'**



Base: Household consumers (n=2,225), Small business consumers (n=524)

Satisfaction

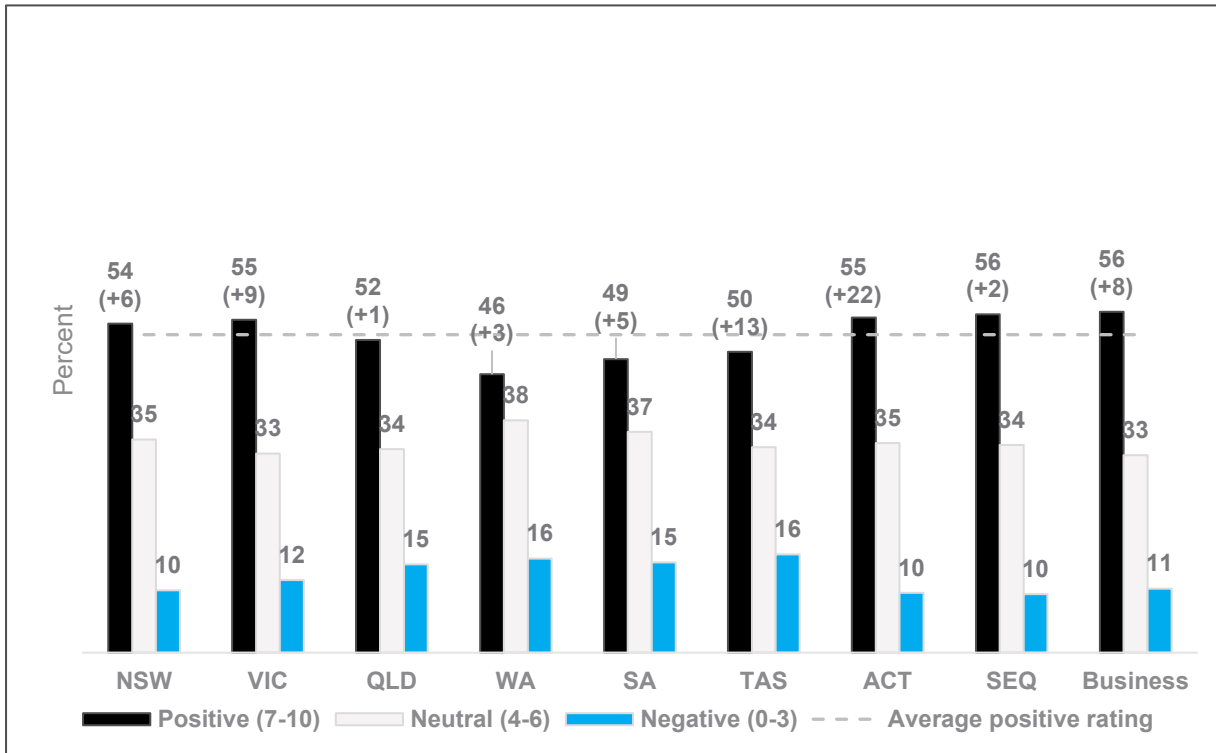
Overall value for money (Electricity)

Satisfaction with the value for money of electricity has increased in all states and territories, and among small businesses.

The biggest increases in satisfaction were:

- In ACT (up 22% to 55% overall), in Tasmania (up 13% to 50%) and in Victoria (up 9% to 55%).
- Among small business consumers (up 8% to 56%).

*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'*



Base: Household consumers (n=2,225), Small business consumers (n=524)

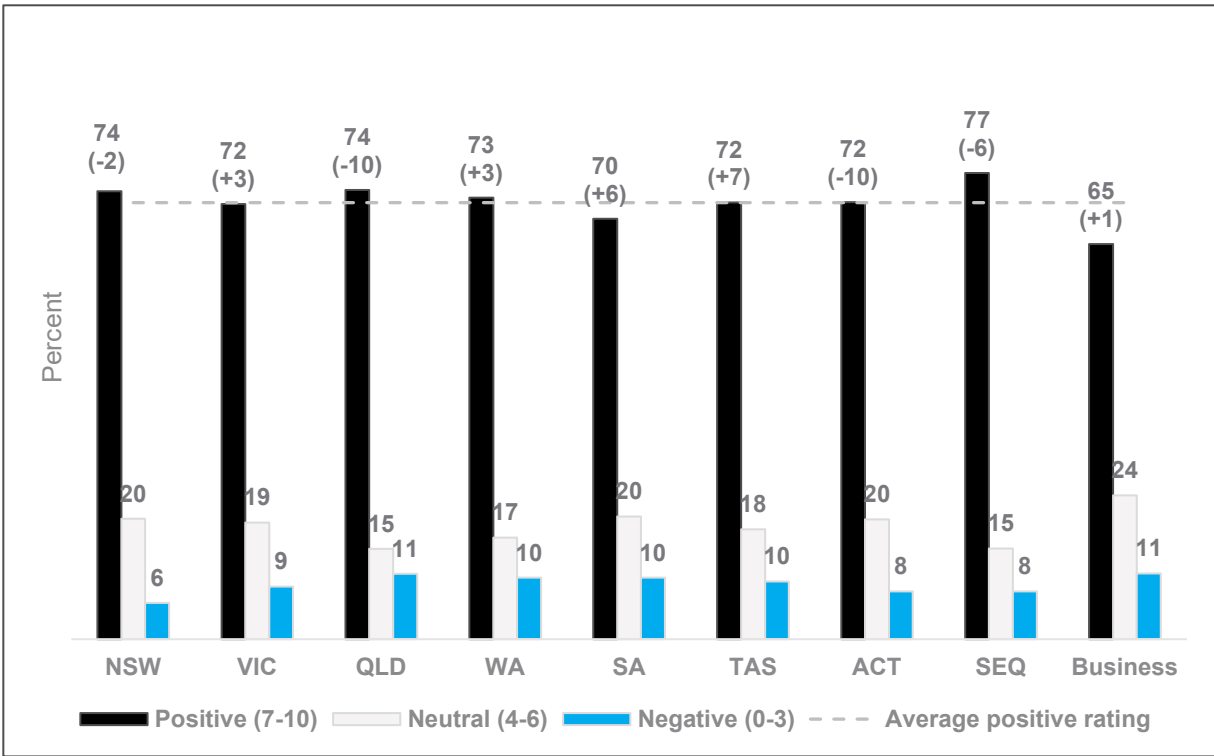
Satisfaction

Reliability (Electricity)

Changes in satisfaction with reliability of electricity supply varied across markets.

- Satisfaction increased in Tasmania by 7% to 72% and in South Australia by 6% to 70% but fell by 10% in Queensland and ACT.
- Satisfaction with reliability is lower among small businesses than households (65% to a lowest satisfaction of 70% in South Australian households).

*Thinking about the reliability of your electricity supply, how satisfied are you with the number of times you've had loss of power, blackouts or other faults with your electricity supply in the past 6 months? (%)*  
0-10 scale, 0='not at all satisfied', 10='very satisfied'



Base: Household consumers (n=2,225), Small business consumers (n=524)



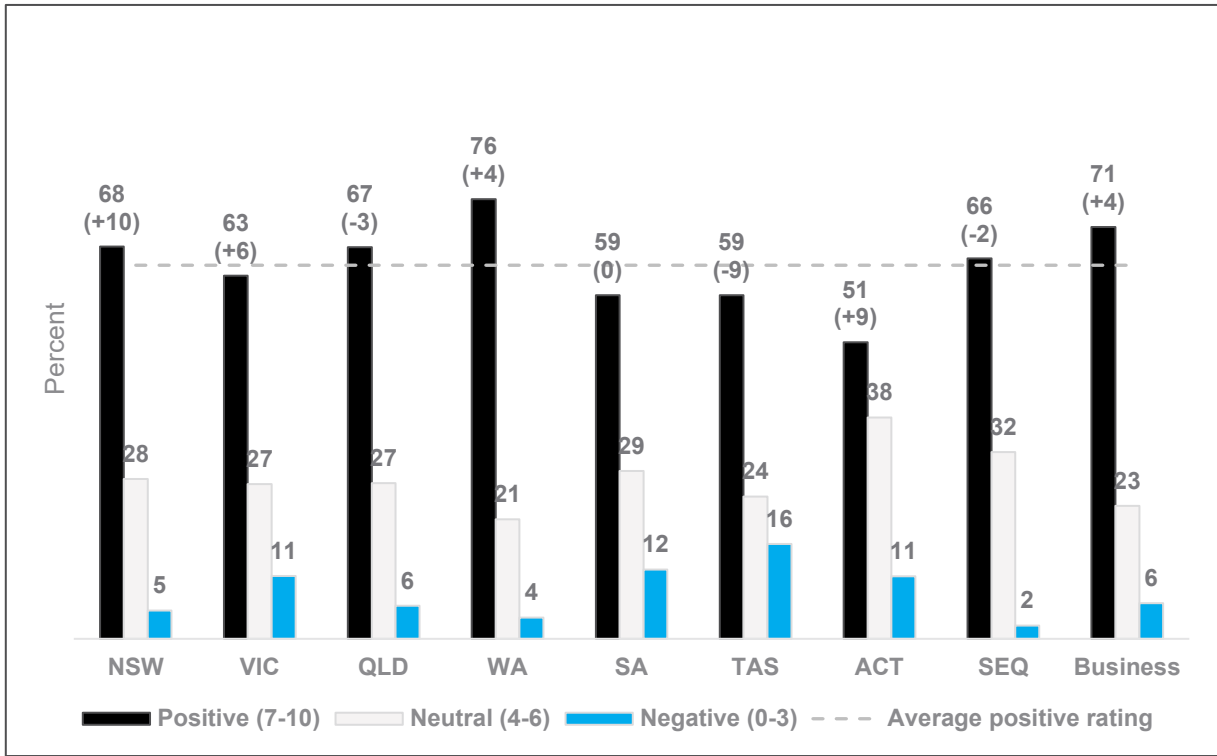
Satisfaction

Overall value for money (Gas)

New South Wales and the ACT showed the largest increases in rating of gas value for money.

- There was a 10% increase in New South Wales and 9% in the ACT.
- Satisfaction with value for money of gas was down 9% in Tasmania\* (to 59%).

**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'**



Base: Household consumers (n=1,418), Small business consumers (n=355)

\*Note: Small sample size for Tasmania (n=49)

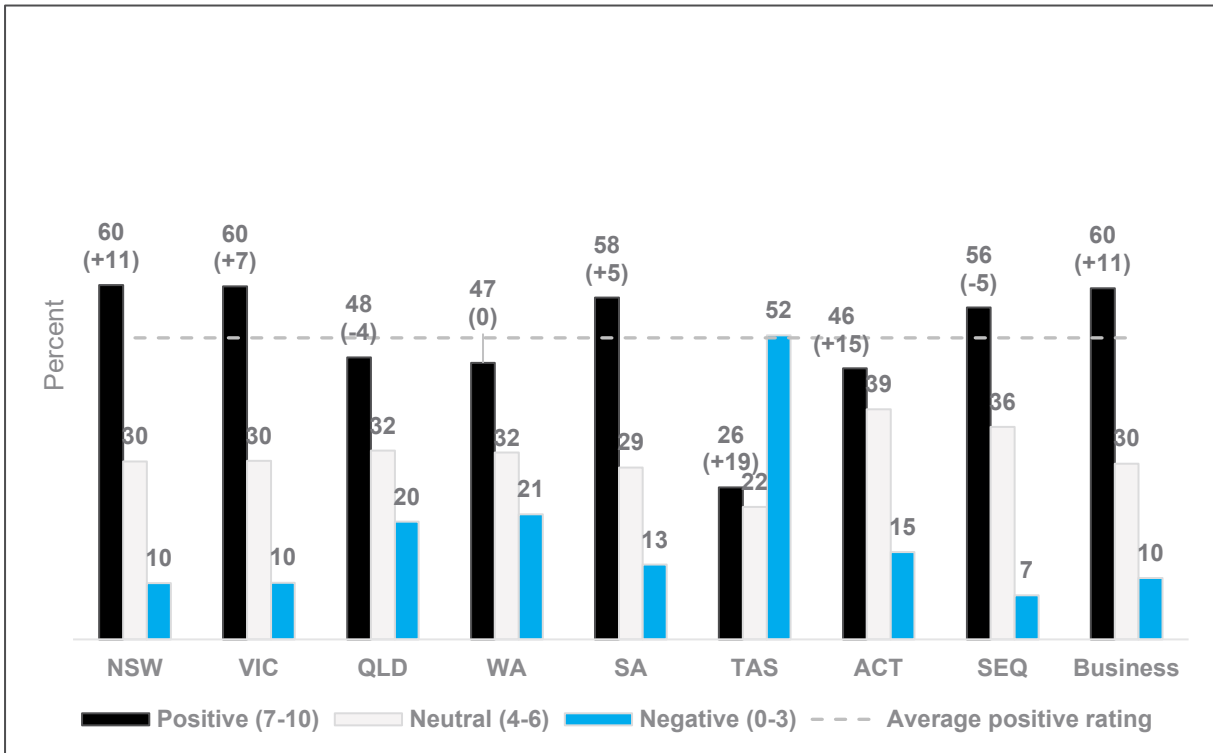
Satisfaction

Level of competition

Satisfaction with levels of competition in the energy market is up in most markets.

- Satisfaction with competition increased in Tasmania (up 19%), ACT (up 15%) and NSW (up 11%).
- Small businesses also recorded an increase of 11% in satisfaction with competition (to 60%).
- Queensland household consumers' satisfaction with competition decreased 4% to 48% (down 5% to 56% in South East Queensland).

**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'**



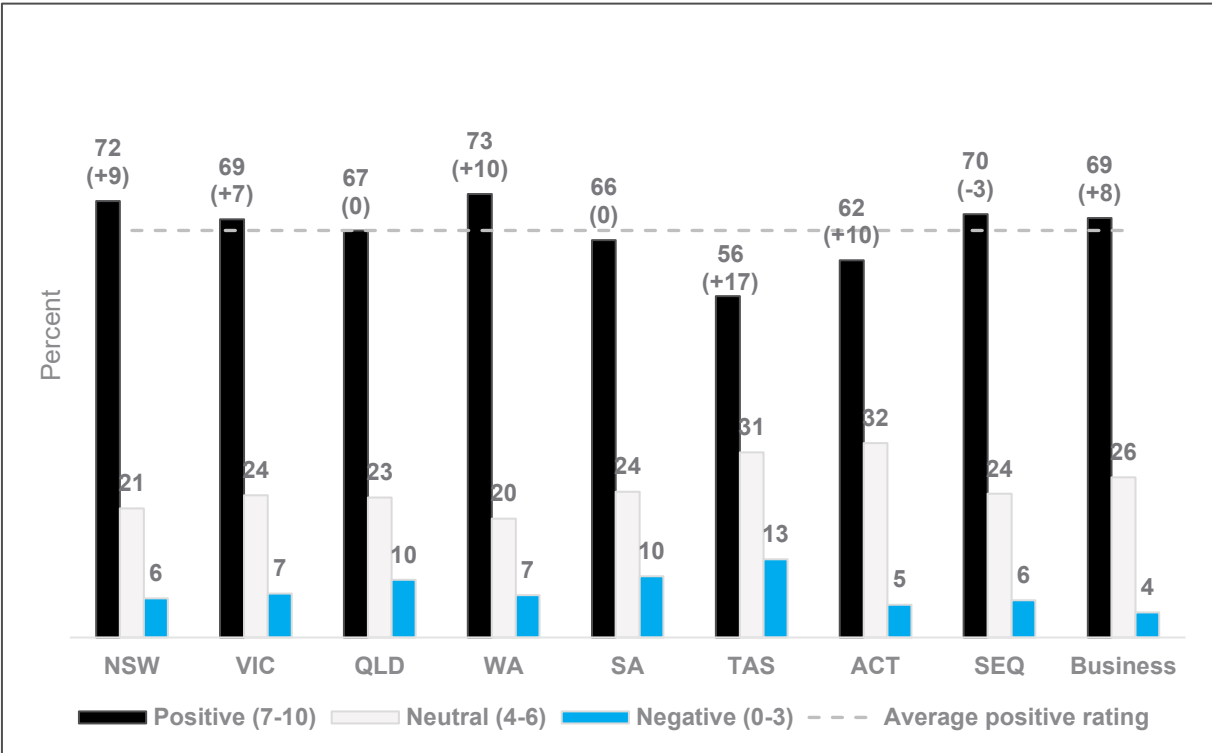
Base: Household consumers (n=2,225), Small business consumers (n=524)

## Consumer confidence in their abilities

Consumers' confidence in their own ability to make choices about the energy market is either up or holding steady in all markets.

- Confidence in ability to make choices increased in Tasmania (up 17%), Western Australia and the ACT (both up 10%), and New South Wales (9%).
- South East Queensland saw a decrease in this measure, down 3% to 70%

**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'



Base: Household consumers (n=2,225), Small business consumers (n=524)

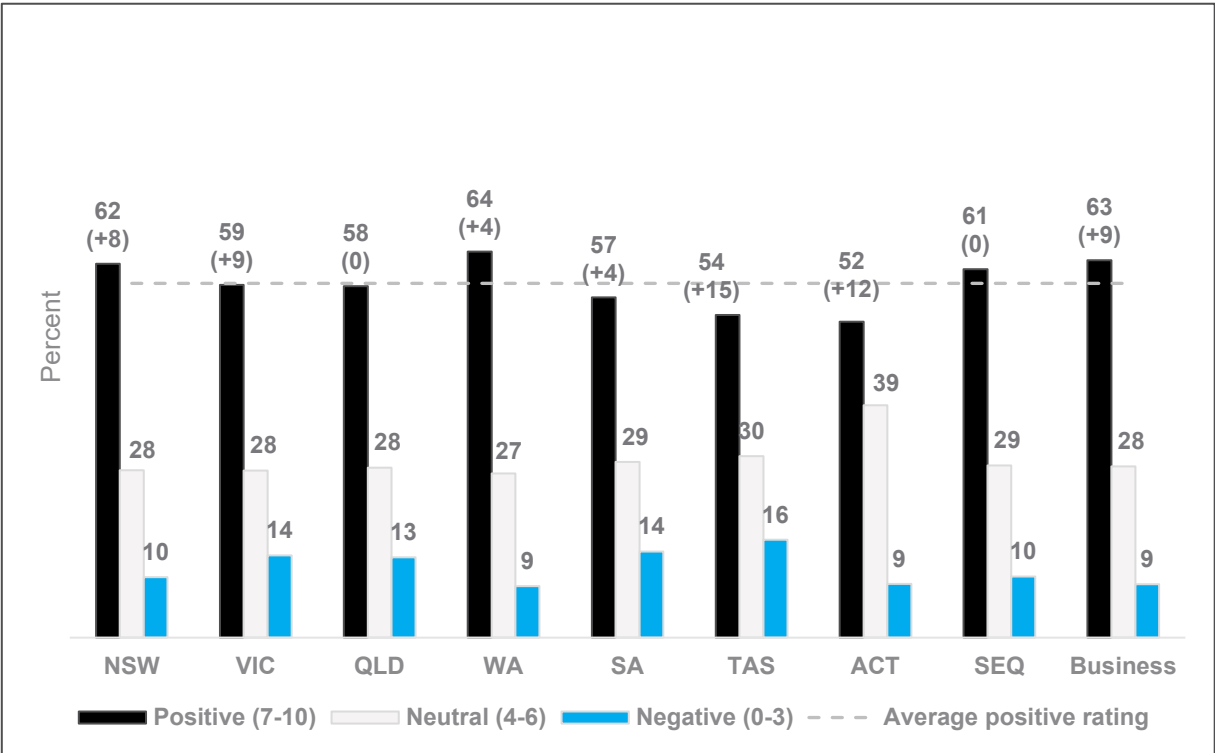
Confidence

### Confidence in the availability of information

Consumer confidence that there is enough easily understood information available for them to make decisions about energy products and services has increased in all markets except Queensland.

- The largest increases were in Tasmania (up 15% to 54%) and ACT (up 12% to 52%). Despite these increases, consumers in these markets still have lower levels of confidence than other states.

*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'



Base: Household consumers (n=2,225), Small business consumers (n=524)

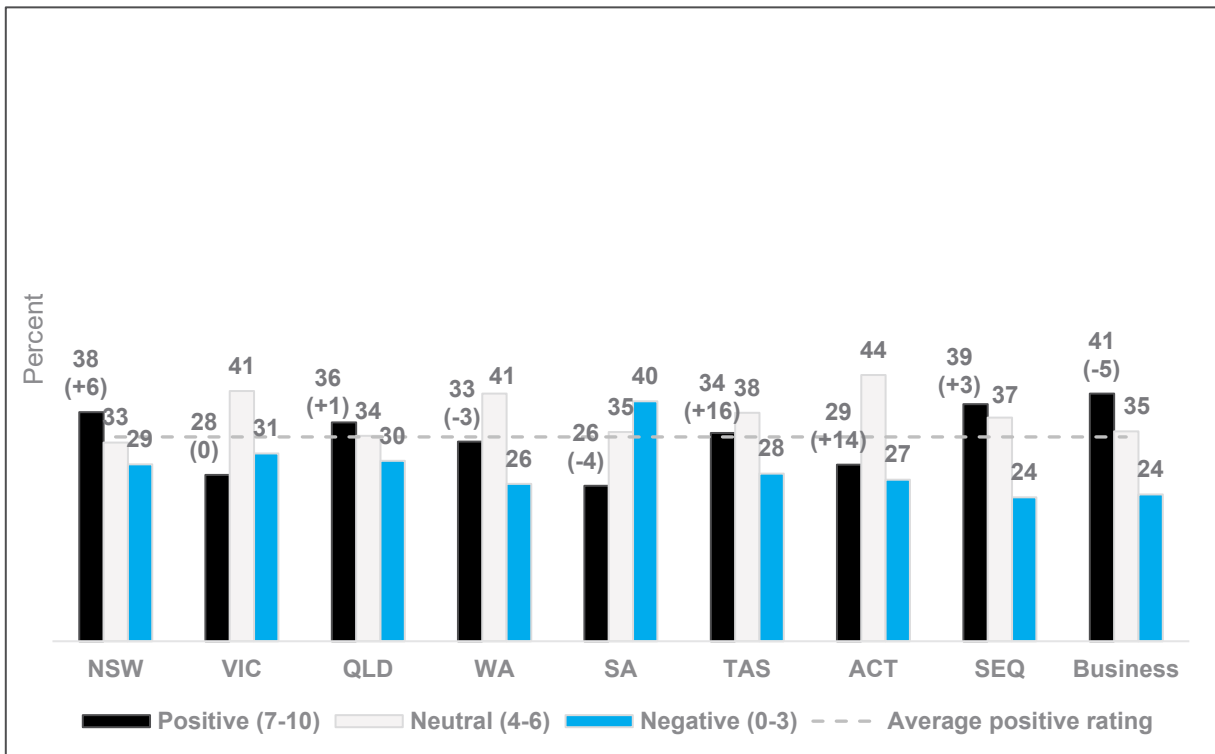
Confidence

## Confidence in the market

**Consumer confidence that the energy market is working in their long-term interest is low compared to other confidence and satisfaction measures.**

- The largest increases for this measure were in Tasmania (up 16% to 34%) and the ACT (up 14% to 29%).
- Notwithstanding increases in most states and territories, confidence in the market remains low, with results for individual jurisdictions ranging from 26% in South Australia to 39% in SEQ.

***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'***



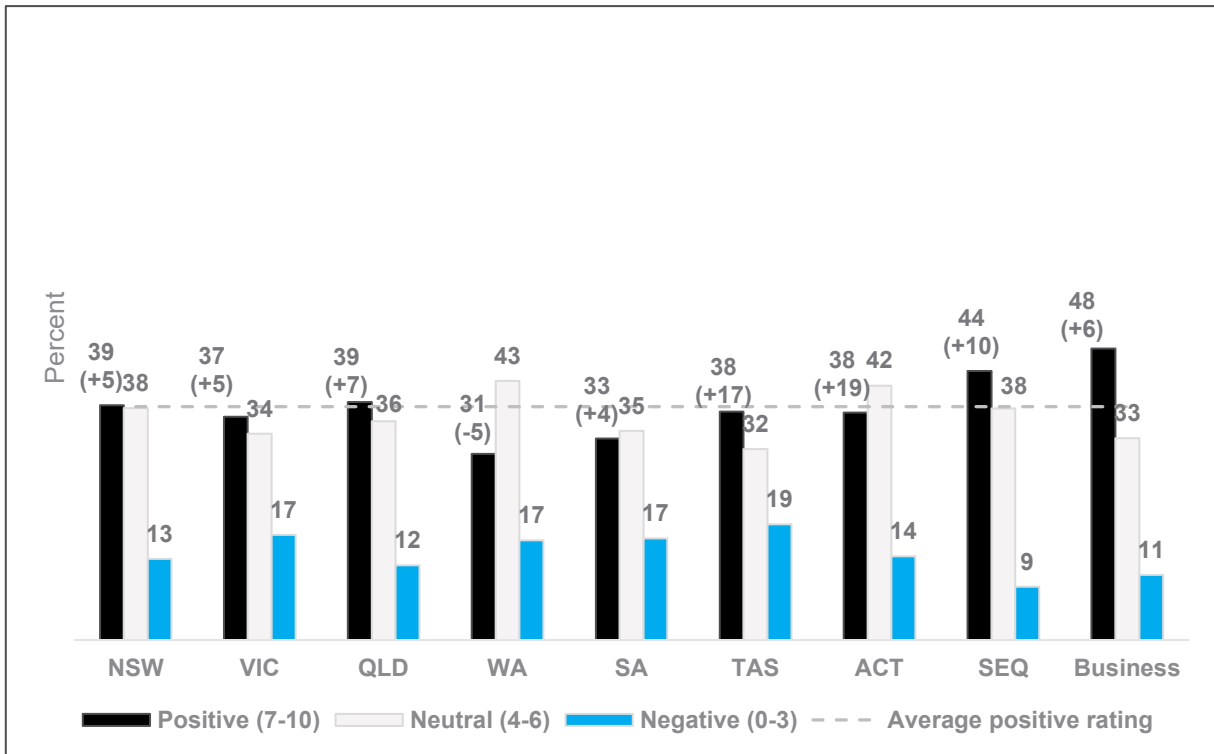
Base: Household consumers (n=2,225), Small business consumers (n=524)

## Confidence in the future value for money

Confidence in future value for money has increased in all markets except WA but remains low overall.

- Increases were largest in the ACT (up 19% to 38%) and Tasmania (up 17% to 38%).
- Confidence has increased in South East Queensland by 10% (to 44%) driving a 7% increase across the entire state.

**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'



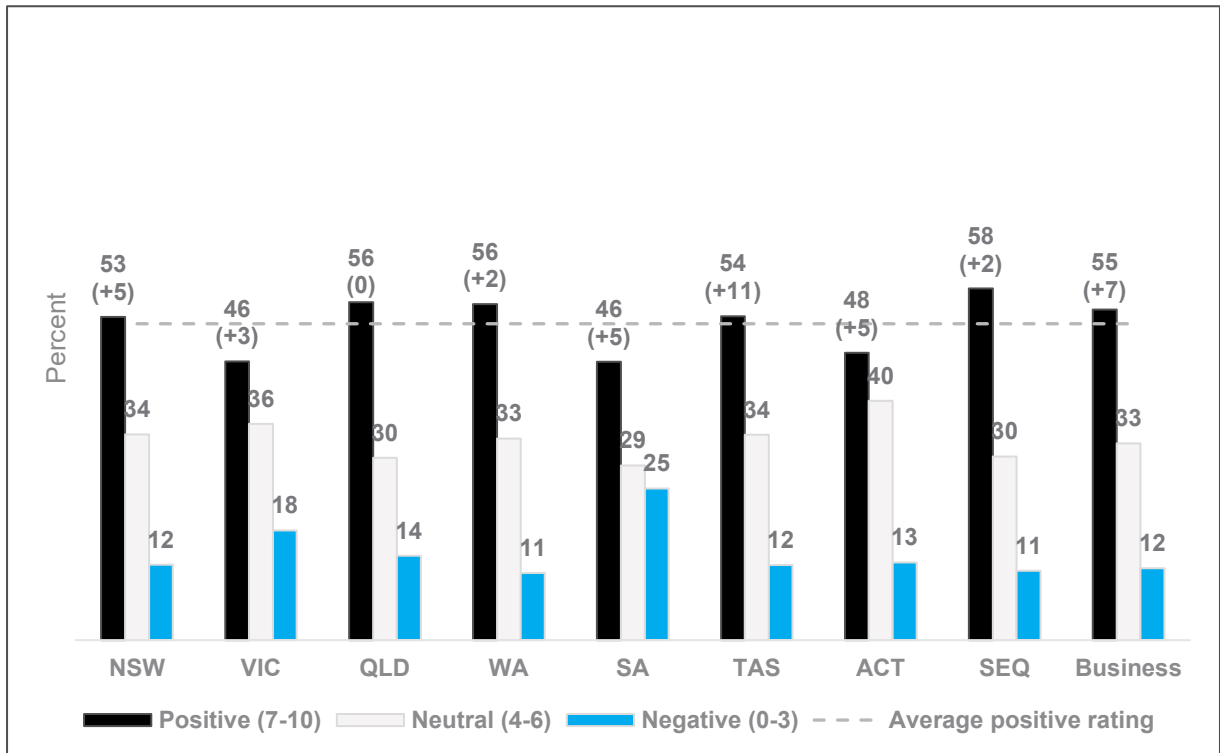
Base: Household consumers (n=2,225), Small business consumers (n=524)

## Confidence in future reliability

The proportion of consumers expressing confidence that the market will deliver increased reliability has increased or held steady in all markets.

- There was an increase in confidence among Tasmanian household consumers (up 11% to 54%).
- Confidence in future reliability among small businesses has increased by 7% to 55%.
- Confidence in future reliability is still significantly lower than satisfaction with current reliability in all markets.

*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'*



Base: Household consumers (n=2,225), Small business consumers (n=524)

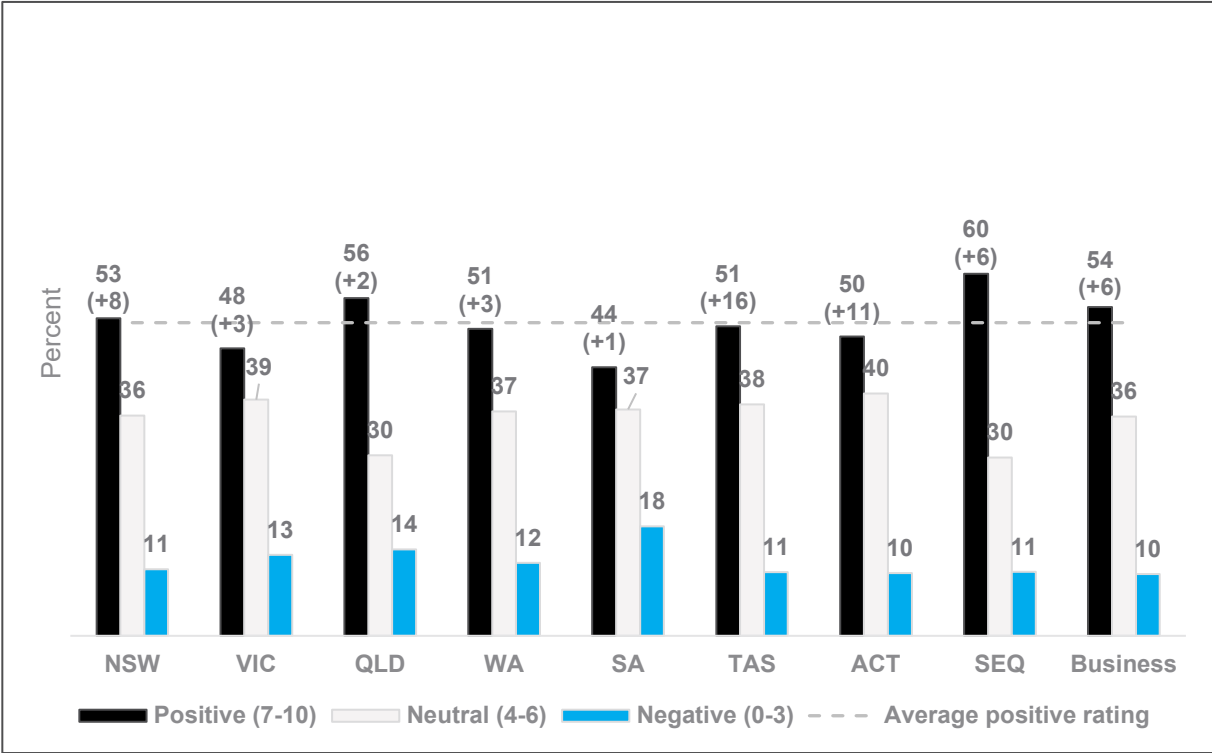
Confidence

### Confidence in future technology

The proportion of consumers expressing confidence that the market will deliver technological advances to manage energy costs has increased in all markets.

- Increases were largest in Tasmania (up 16% to 51%) and the ACT (up 11% to 50%).
- No markets saw a decrease in this measure from this time last year.

*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'



Base: Household consumers (n=2,225), Small business consumers (n=524)

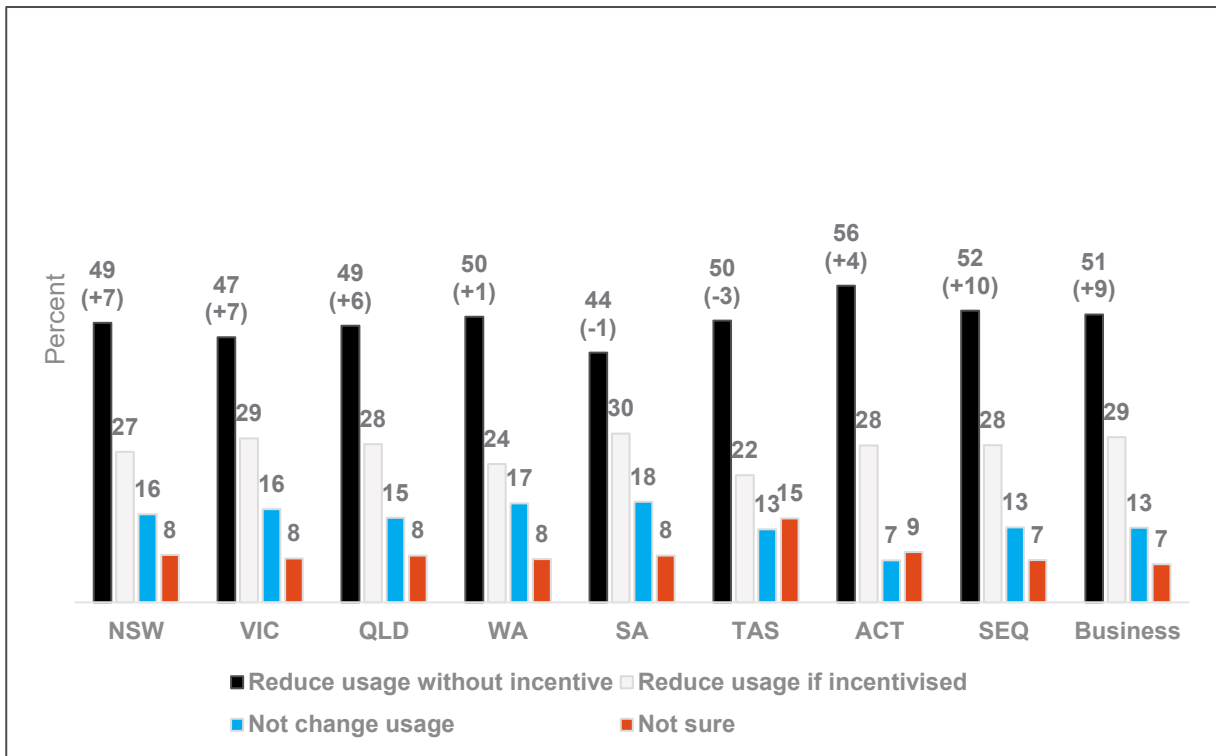


## Energy use reduction campaigns

Most consumers are prepared to reduce energy use during periods of very high demand.

- Over half of households in the ACT and South East Queensland would be prepared to reduce their energy usage without incentive.
- 51% of small businesses would be prepared to take action without an incentive.
- About one in four household consumers would require an incentive to reduce their energy use during periods of very high demand.

*As you may be aware, sometimes there are campaigns asking people to reduce their energy use during periods of very high demand (e.g. when everyone is using their air conditioning during very hot periods). Such campaigns are often backed by government agencies or respected community groups. If there was such a campaign asking that people reduce their energy use during a very hot period, which of the following would you be most likely to do? (%)*



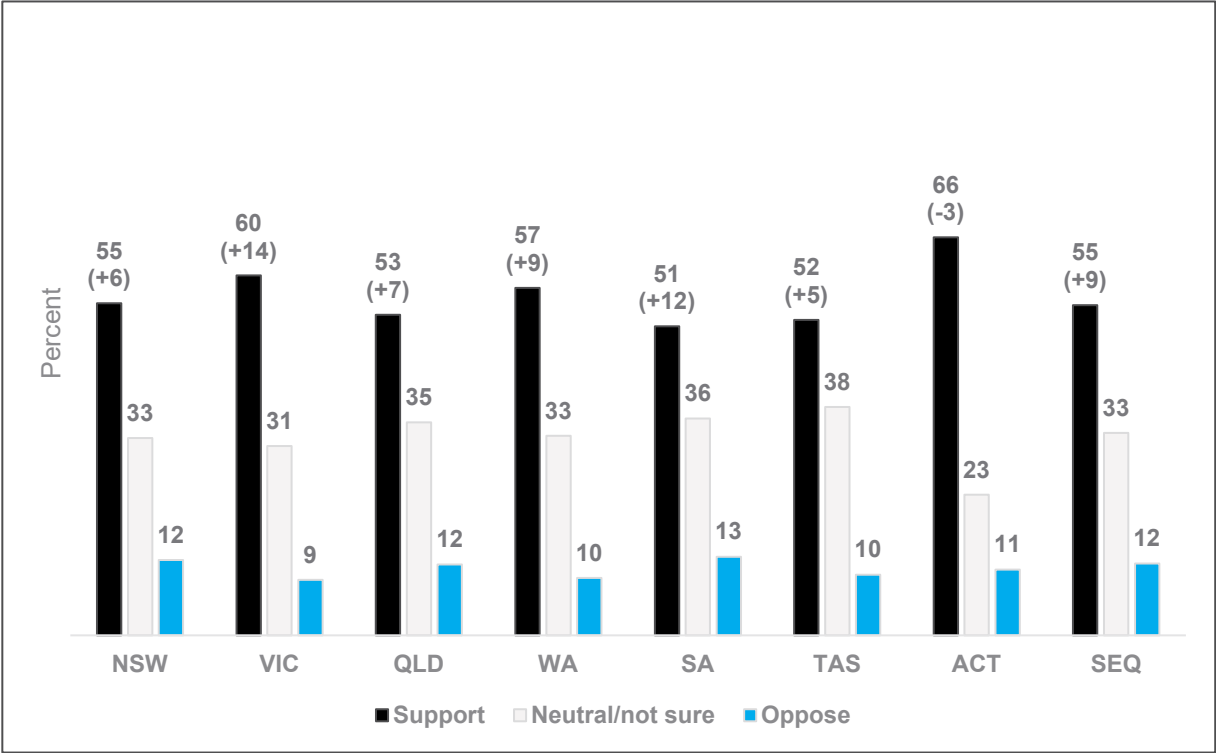
Base: Household consumers (n=2,225), Small business consumers (n=524)

## Mandatory labelling schemes

Roughly half of households support a mandatory labelling scheme for energy efficiency ratings of houses.

- Support was the highest in the ACT, where 66% said they supported the idea.
- Victoria saw the biggest increase in support for this measure, up 14% to 60%.

*How strongly do you support or oppose the following? - Introducing a mandatory labelling scheme for all houses, where all houses would have to have a current energy efficiency rating (%)*



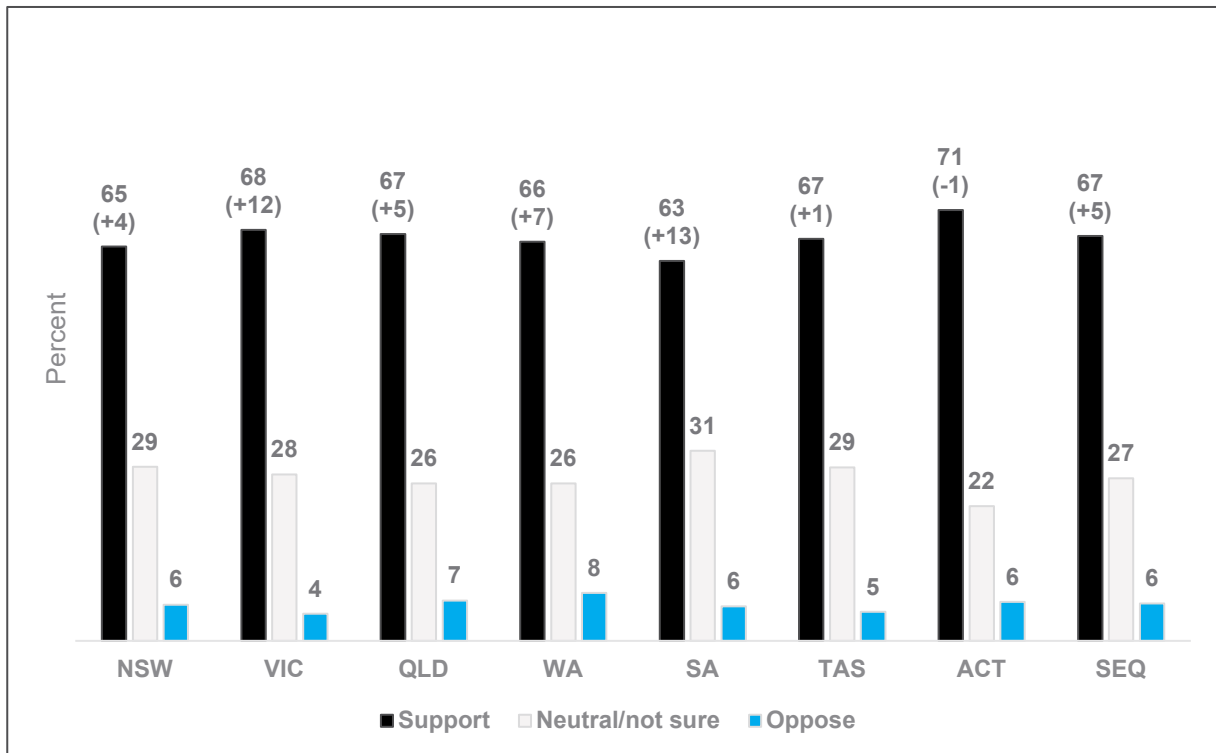
Base: Household consumers (n=2,225)

## Minimum efficiency standards

There was strong support for minimum energy efficiency standards for rental properties across all markets.

- Overall support by renters is now at 67%, 11% higher than among home-owners (56%).
- Support ranges from 71% in the ACT to 63% in South Australia.
- Of those who do not support the initiative, most are neutral or unsure – less than 1 in 10 would oppose the measure in each market.

*How strongly do you support or oppose the following? - Increasing minimum standards for energy efficiency for rental properties, to ensure that they meet basic energy efficiency standards (%)*



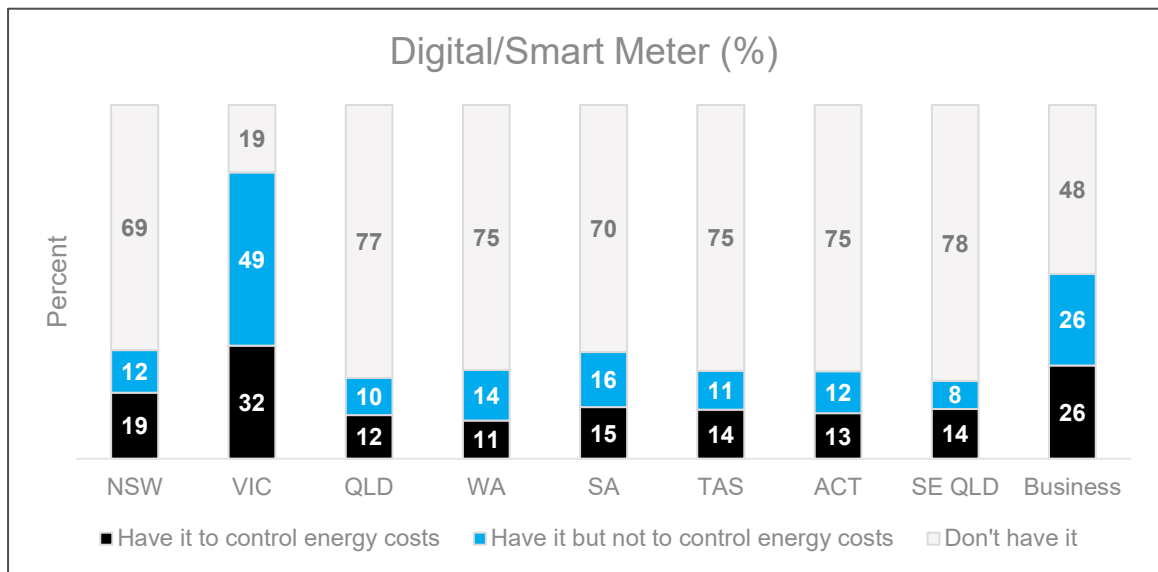
Base: Household consumers (n=2,225)

## Technology to control energy costs

**Uptake of smart technology and energy management systems is modest but growing across most energy markets.**

- In Victoria, smart meters were rolled out through a State Government program, but only about 81% of household consumers report having a smart meter and just 32% say that they use it to control energy costs.
- Small businesses also report a relatively high uptake of smart meters (52%) but only half of these (26%) say they use the device to manage their energy costs.
- In other states and territories, between 22% (QLD) and 31% (NSW and SA) report having a smart meter. Again, around half of households who have the device actually use it to manage energy costs.

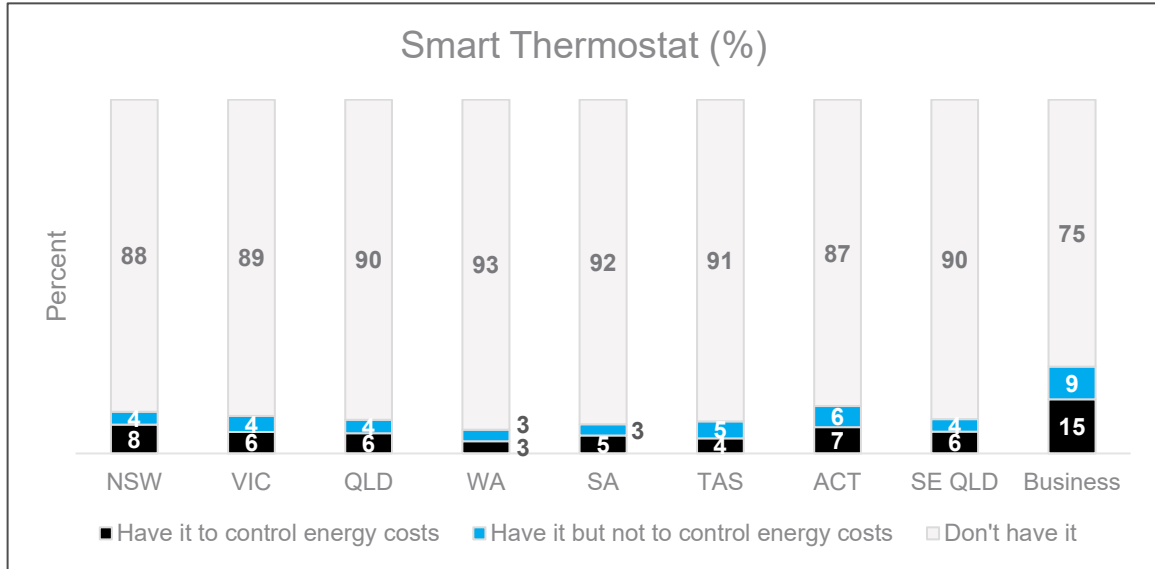
*Which of the following technology do you have at your household / place of business? And which do you use to help control your energy costs? (%)*



Base: Household consumers (n=2,225), Small business consumers who work from home or a mobile location (n=220)

- About 1 in 10 households say they own smart thermostats.

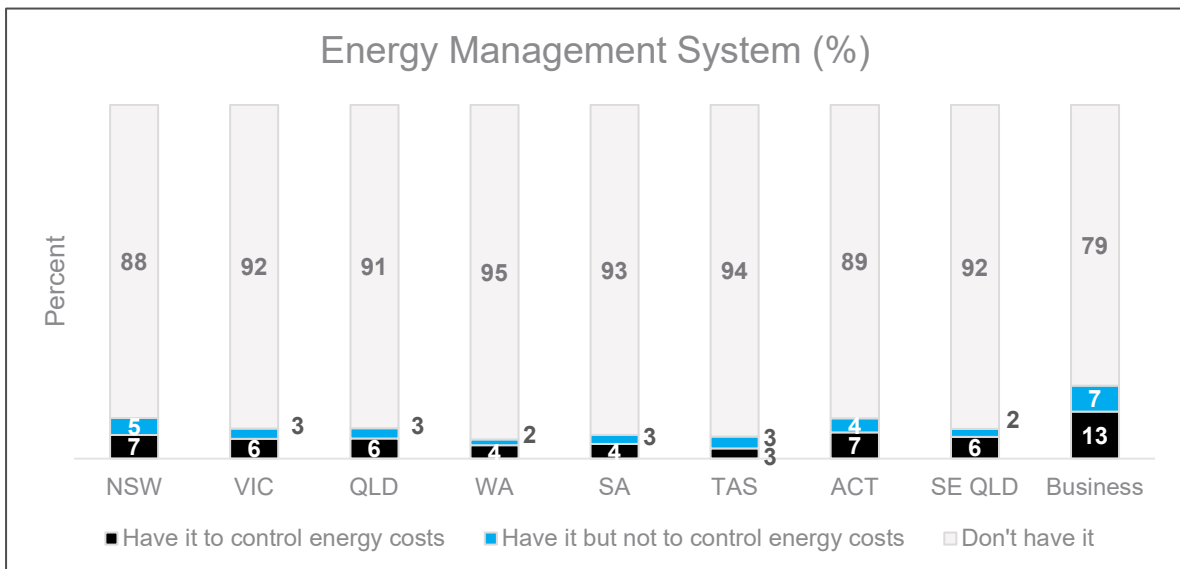
**Which of the following technology do you have at your household / place of business? And which do you use to help control your energy costs? (%)**



Base: Household consumers (n=2,225), Small business consumers who work from home or a mobile location (n=220)

- 20% of small business users say they have an energy management system, while uptake is less than 10% among households in most markets (except NSW with 12% and the ACT with 11%).

**Which of the following technology do you have at your household / place of business? And which do you use to help control your energy costs? (%)**



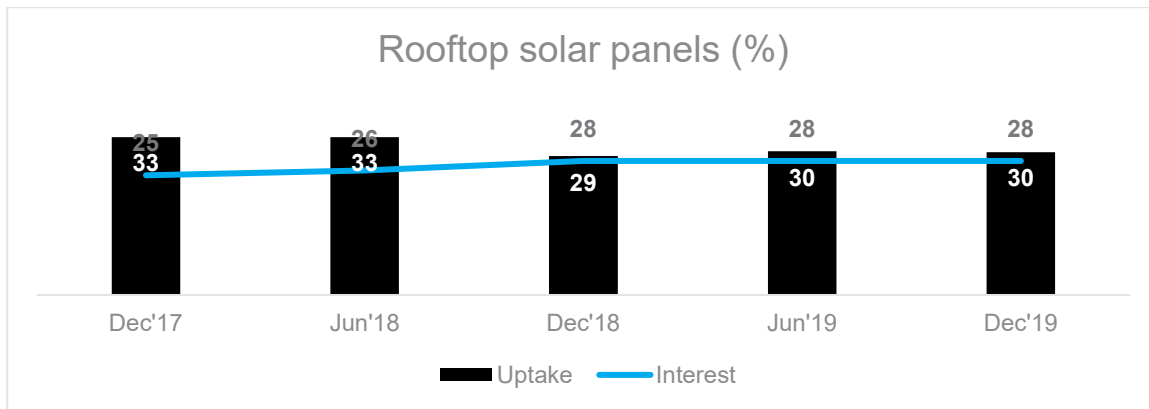
Base: Household consumers (n=2,225), Small business consumers who work from home or a mobile location (n=220)

## Uptake of energy efficient technologies

The research looked at whether consumers who do not already have specific technologies are considering getting them in the future. This section focuses on those technologies that consumers are most likely to see as ways they can use energy more efficiently.

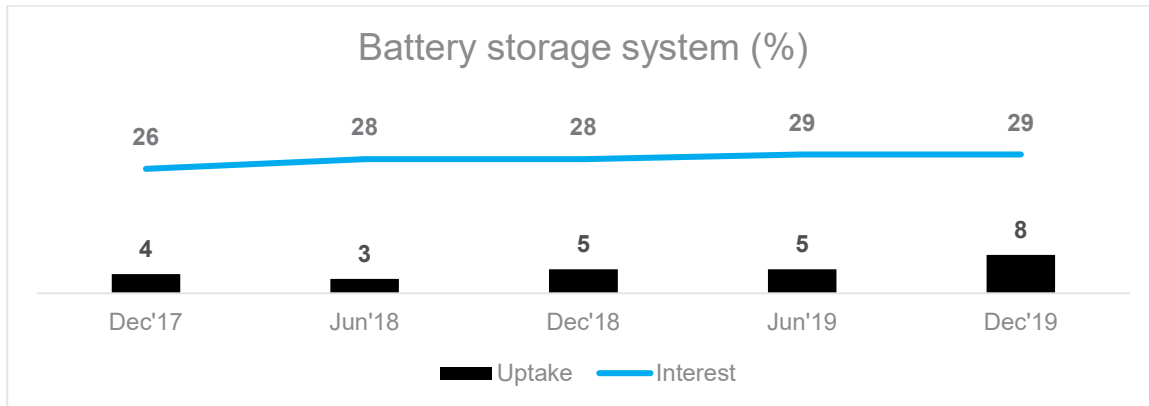
All data below is national (all businesses and households). Trends are not included from earlier than December 2017 due to methodology changes. “Uptake” refers to consumers who have purchased this technology already. “Interest” is defined as those who don’t own the technology yet but have expressed interest in purchasing it sometime in the future.

Uptake and interest of rooftop solar panels is among the highest of the energy efficient technologies, with 30% of respondents reporting they have this product, and 28% of those without panels considering them.



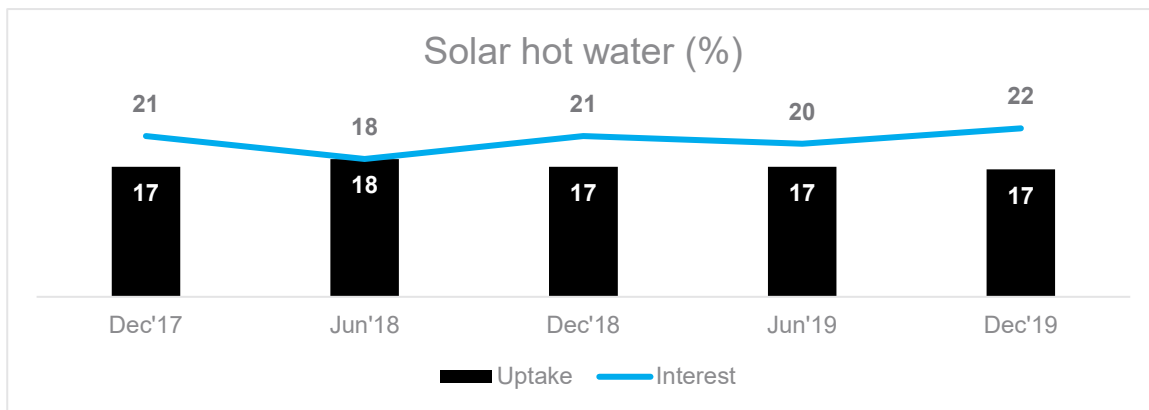
Uptake Base: All Household consumers (n=2,225)

Interest Base: All Household consumers which do not own product (n=1,544)



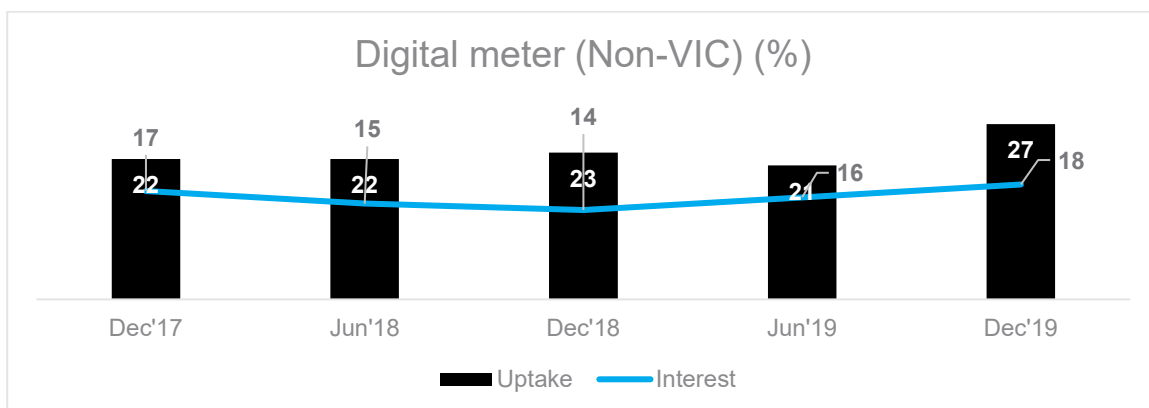
Uptake Base: All Household consumers (n=2,225)

Interest Base: All Household consumers who do not own product (2,058)



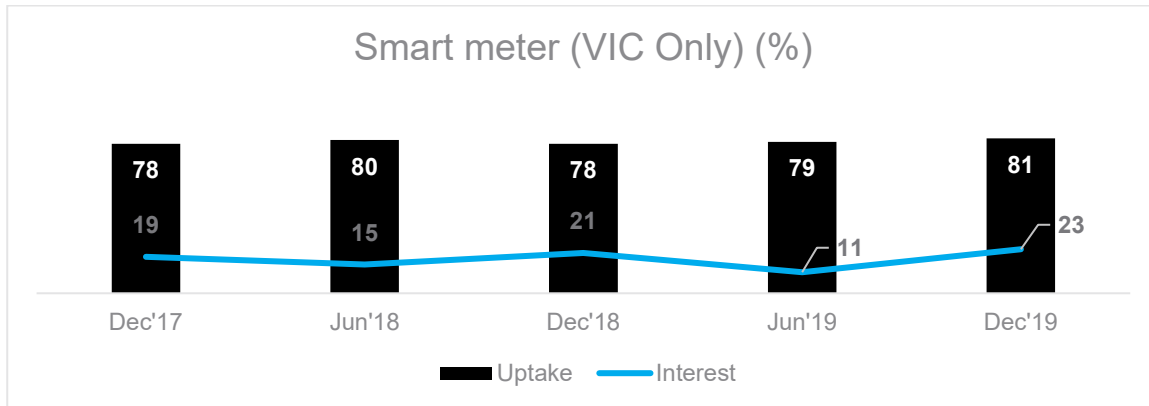
Uptake Base: All Household consumers (n=2,225)

Interest Base: All Household consumers who do not own product (n=1,873)



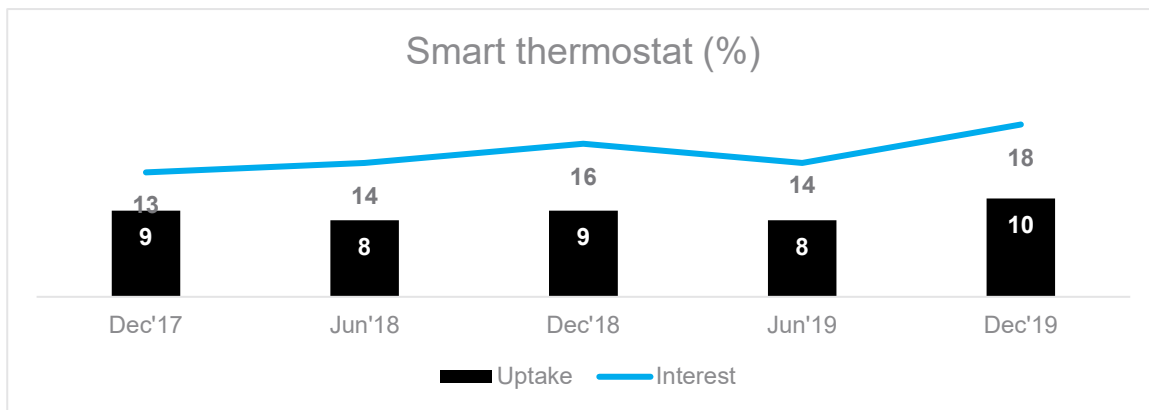
Uptake Base: All Household consumers not in Victoria (n=1,800)

Interest Base: All Household consumers not in Victoria who do not own product (n=1,315)



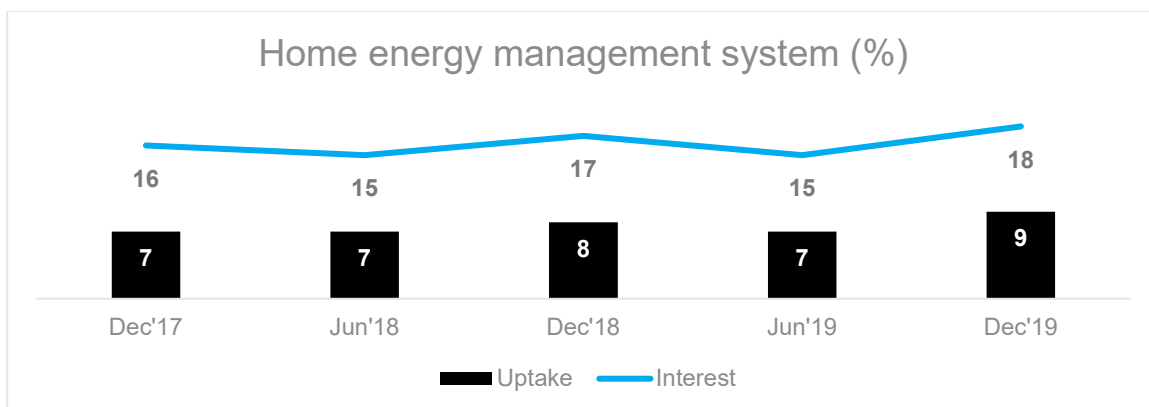
Uptake Base: All Household consumers in Victoria (n=425)

Interest Base: All Household consumers in Victoria who do not own product (n=81)



Uptake Base: All Household consumers (n=2,225)

Interest Base: All Household consumers who do not own product (n=1,089)



Uptake Base: All Household consumers (n=2,225)

Interest Base: All Household consumers who do not own product (n=1,693)

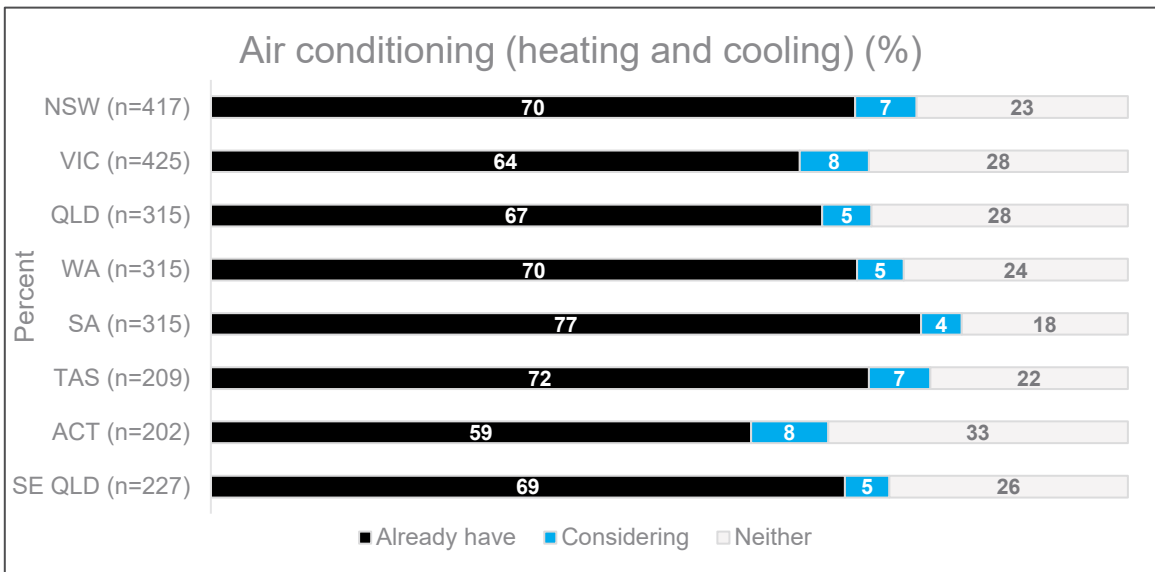
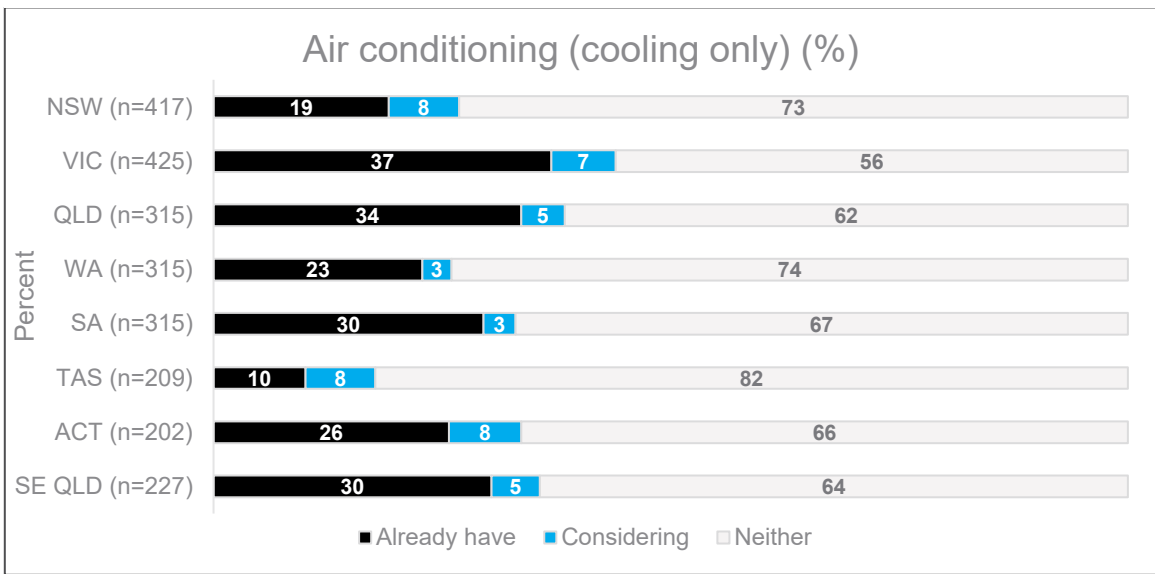


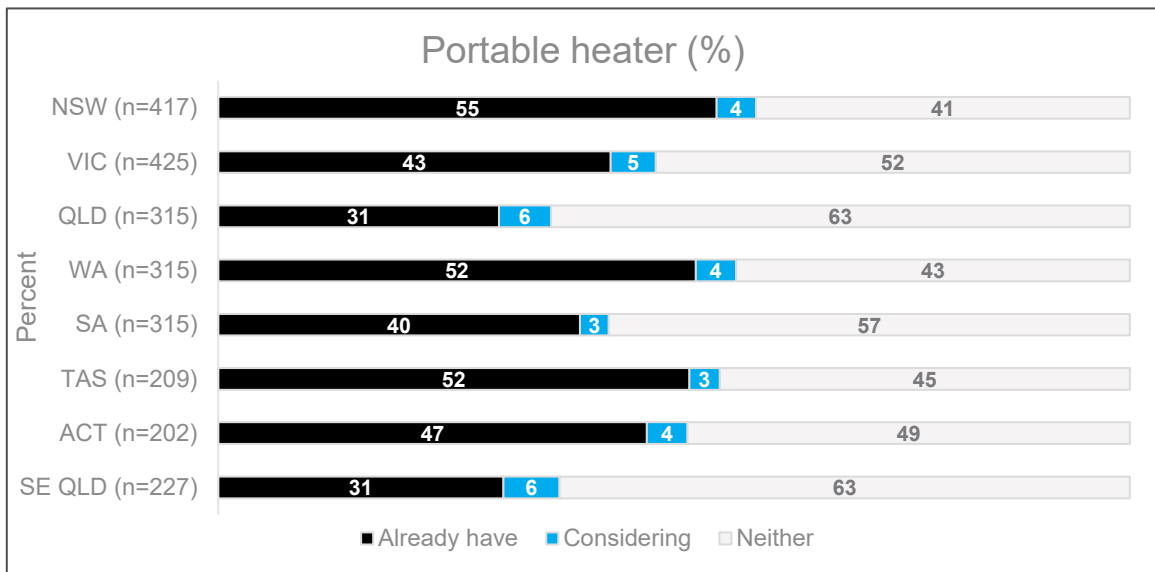
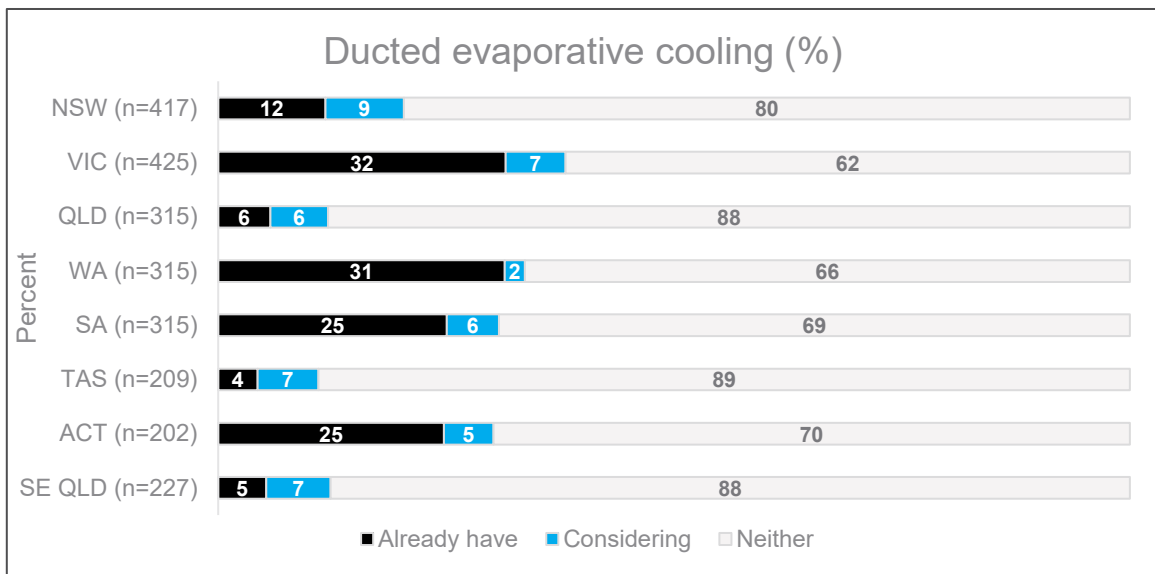
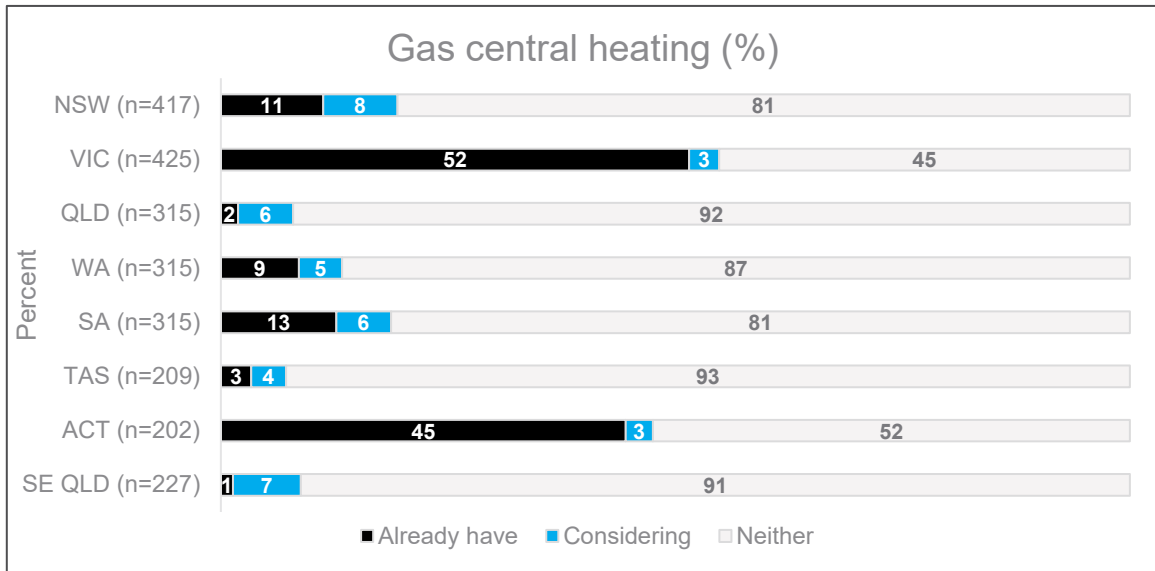
Activity

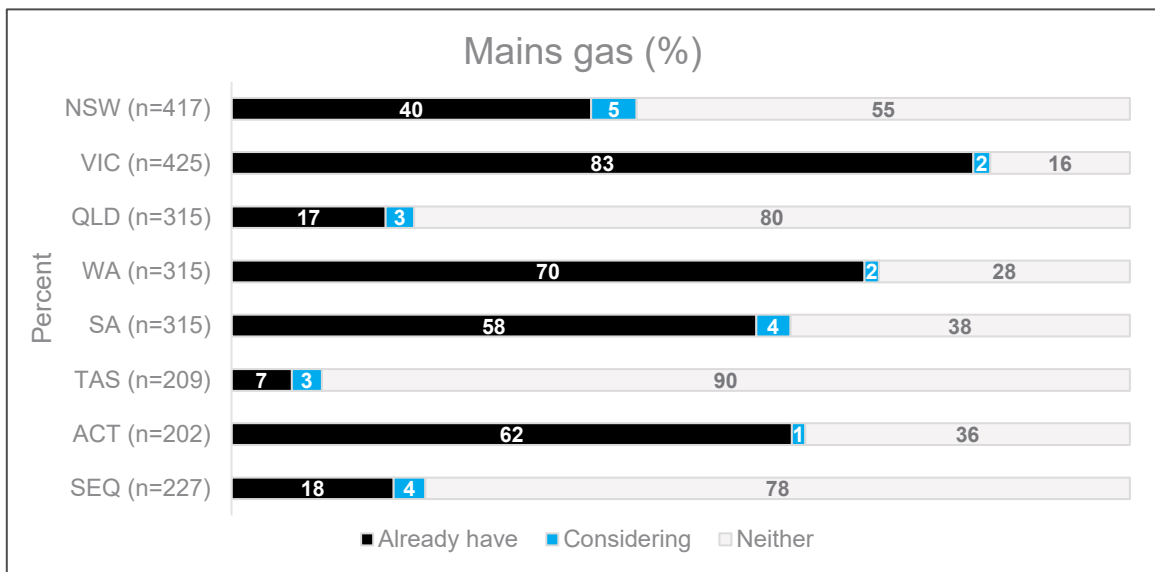
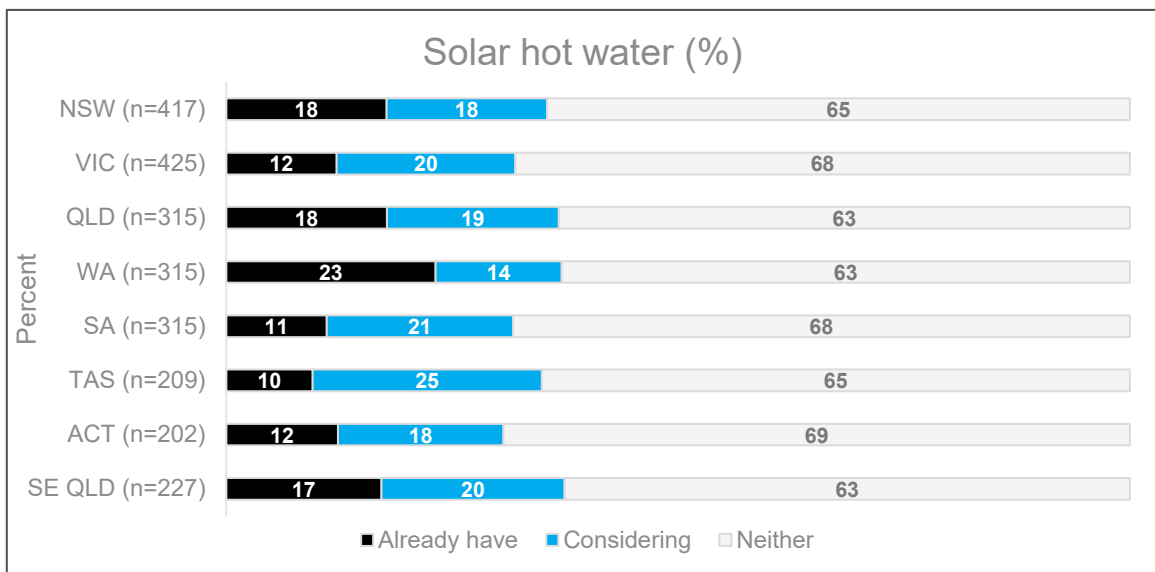
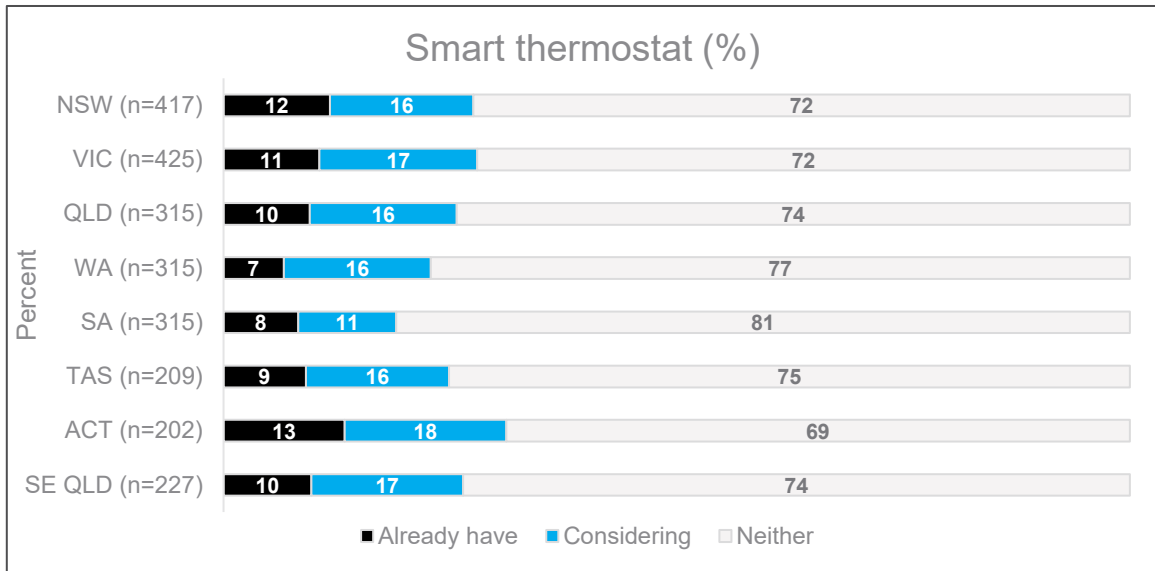
What investments are people considering

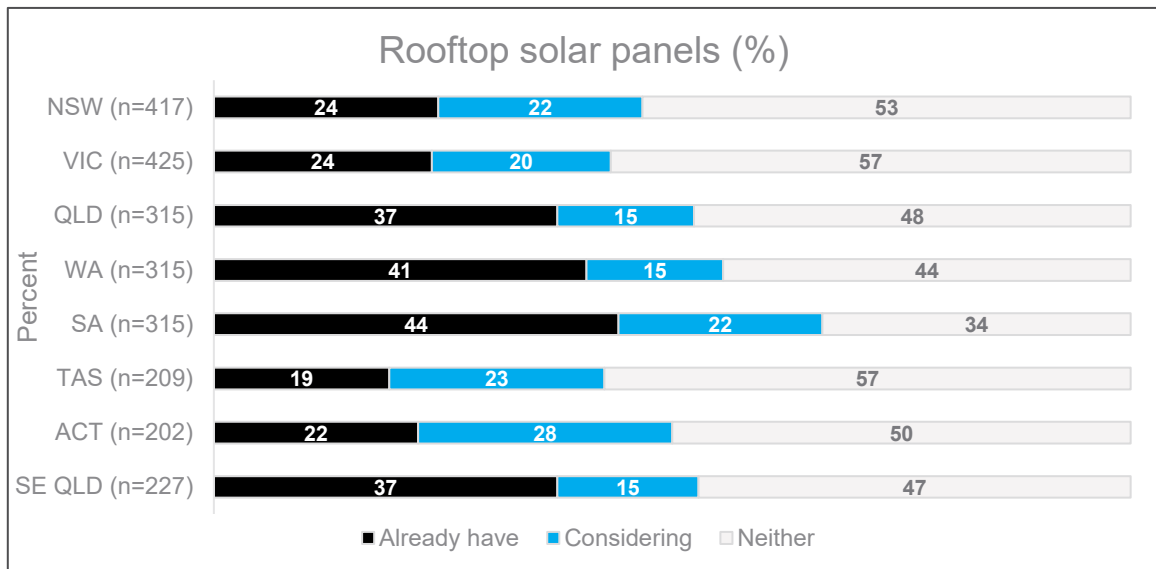
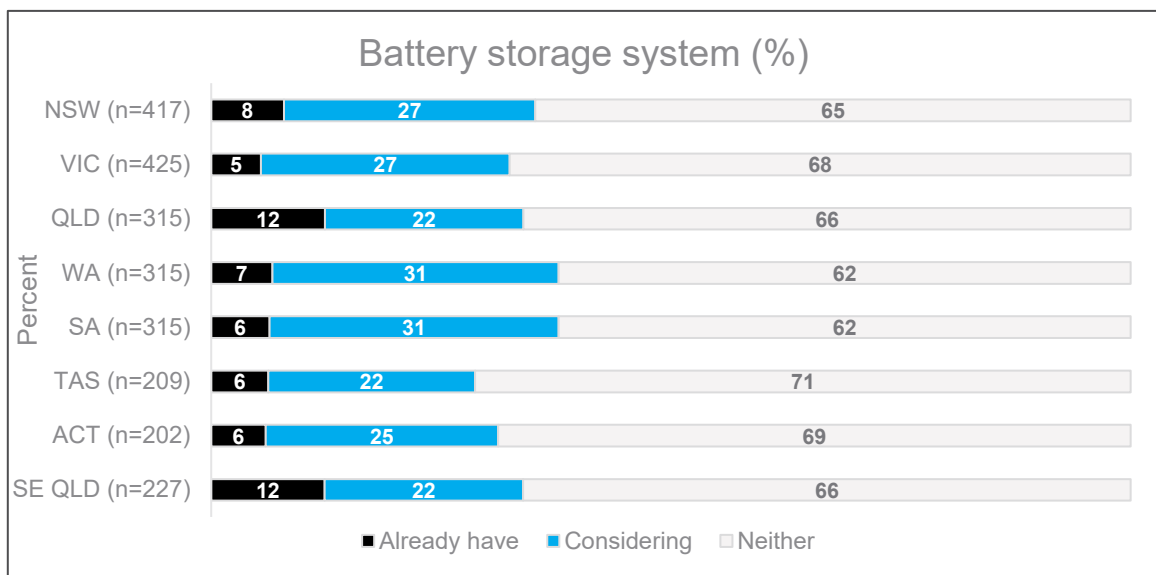
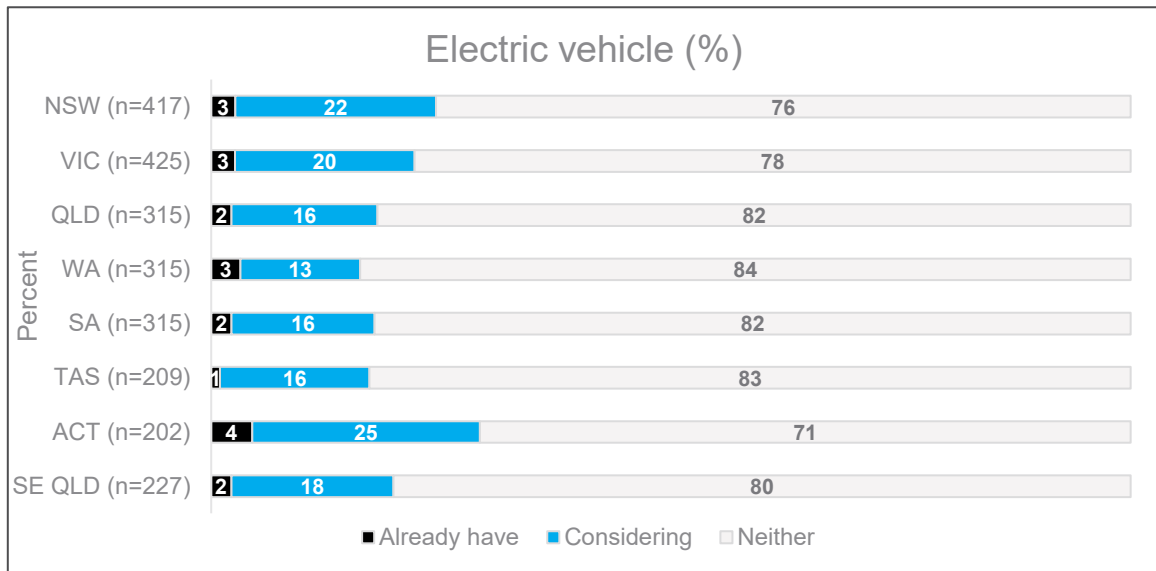
**Which of the following technology do you have at your household? And which do you use to help control your energy costs? (%)**  
**[If not] Which of the following are you intending to purchase for your home?**

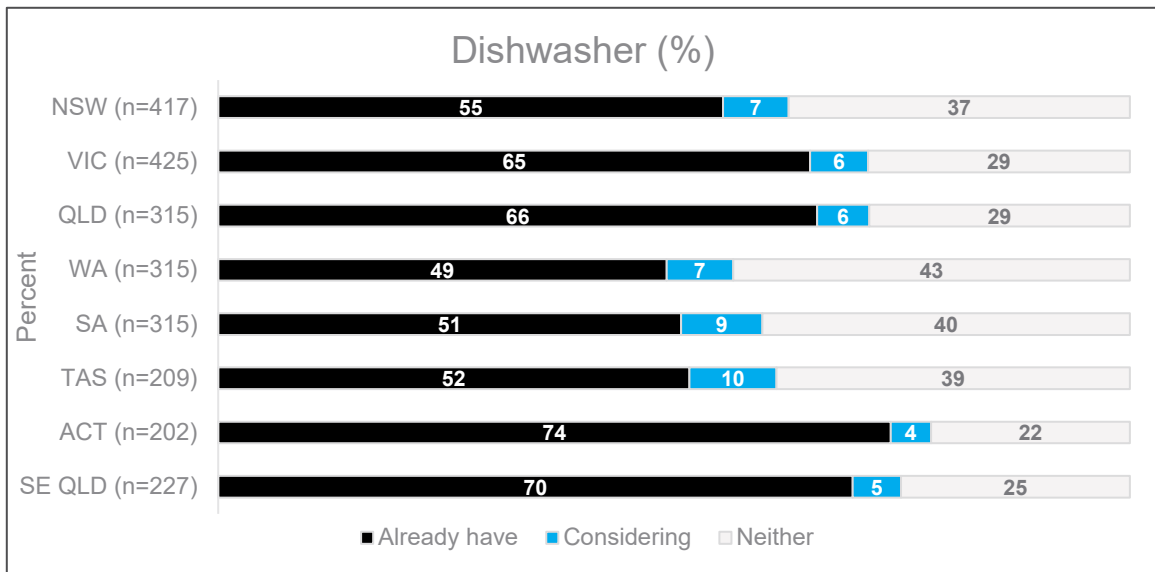
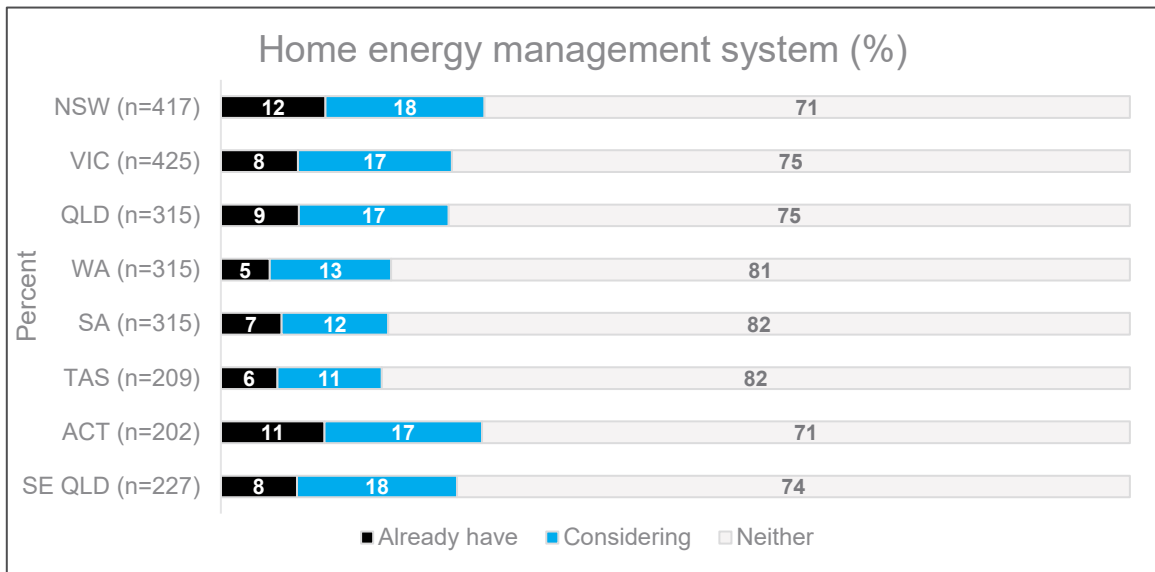
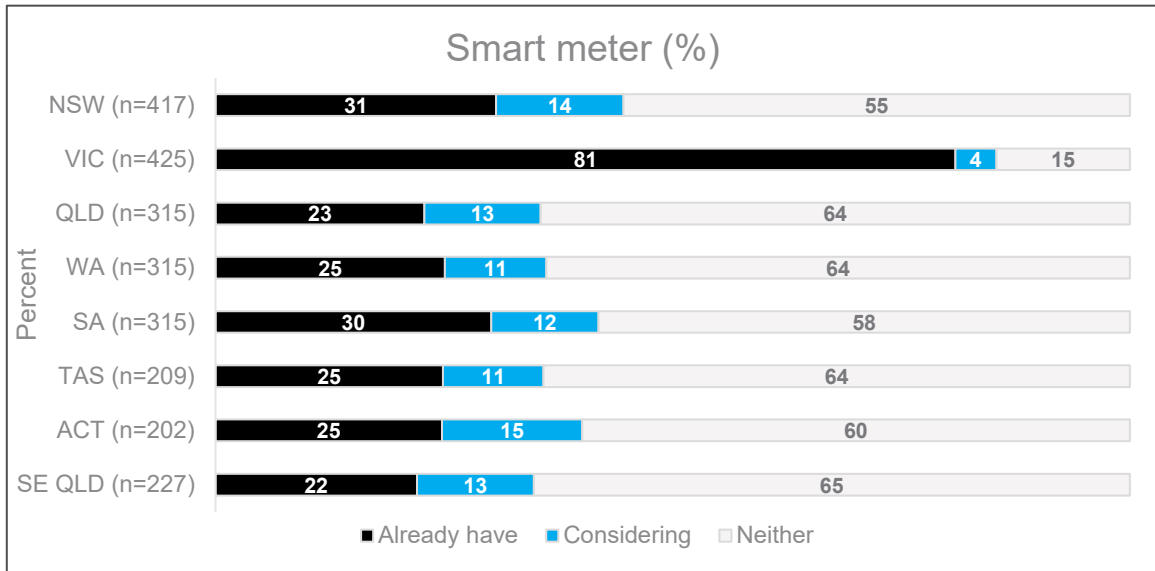
Base: Household consumers in each state

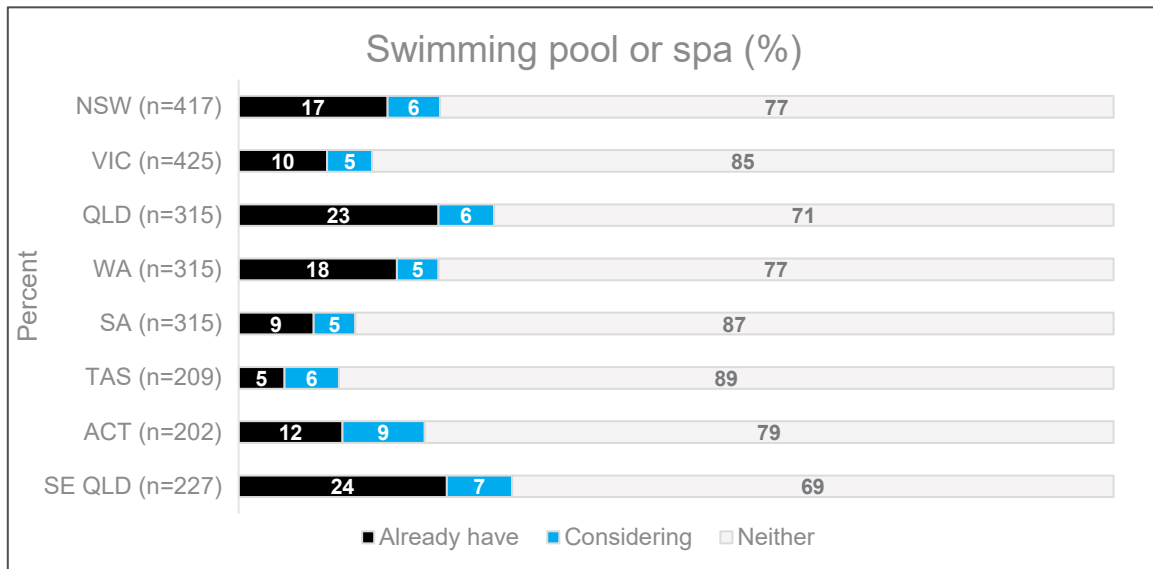












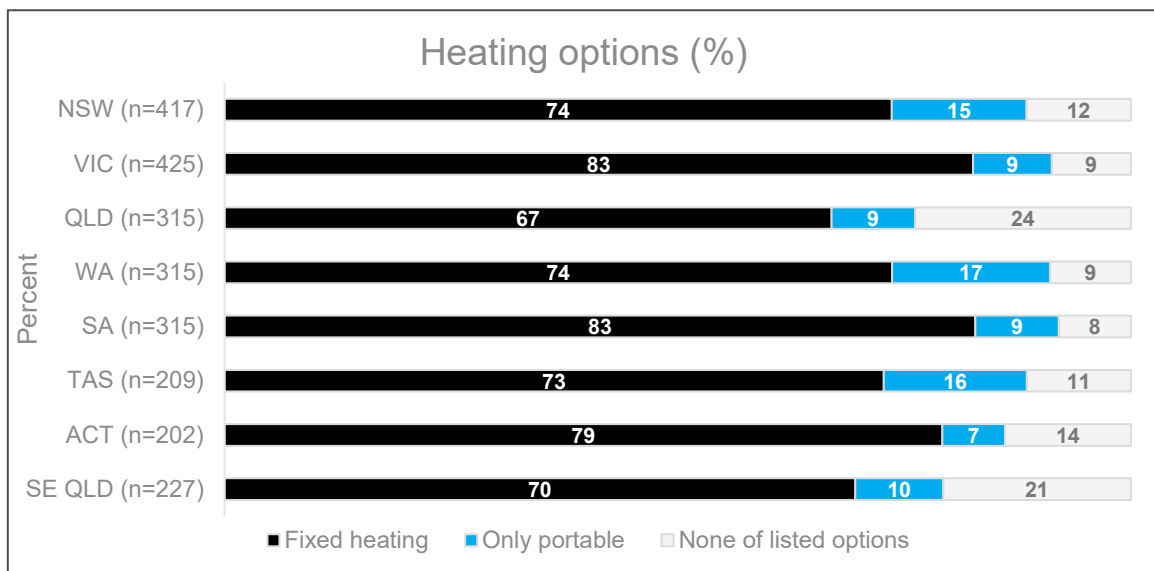
## Home heating

The survey allows us to look at the types of heating consumers have in their households, subject to some limitations:

- For most of the technologies, the survey shows what people have for heating, not what they actually use. It is possible, for example, that some consumers have gas central heating or air conditioning for heating, but actually use portable heaters.
- Similarly, some households may have none of the listed heating options, but still feel that their homes are adequately heated using wood burners.

The chart below shows the percentage who have fixed or permanent heating (i.e. gas central heating or air conditioning for heating), those who have only portable heating or LPG, and those who have none of the listed heating options.

- The vast majority of household consumers in this survey report have fixed heating, with the highest proportions found in the Western Australia, Victoria and South Australia.
- Heating options overall are less common in Queensland (24% report no heating).
- Fixed heating is also less common in Tasmania, WA and NSW, where consumers have the highest uptake of portable heating options.

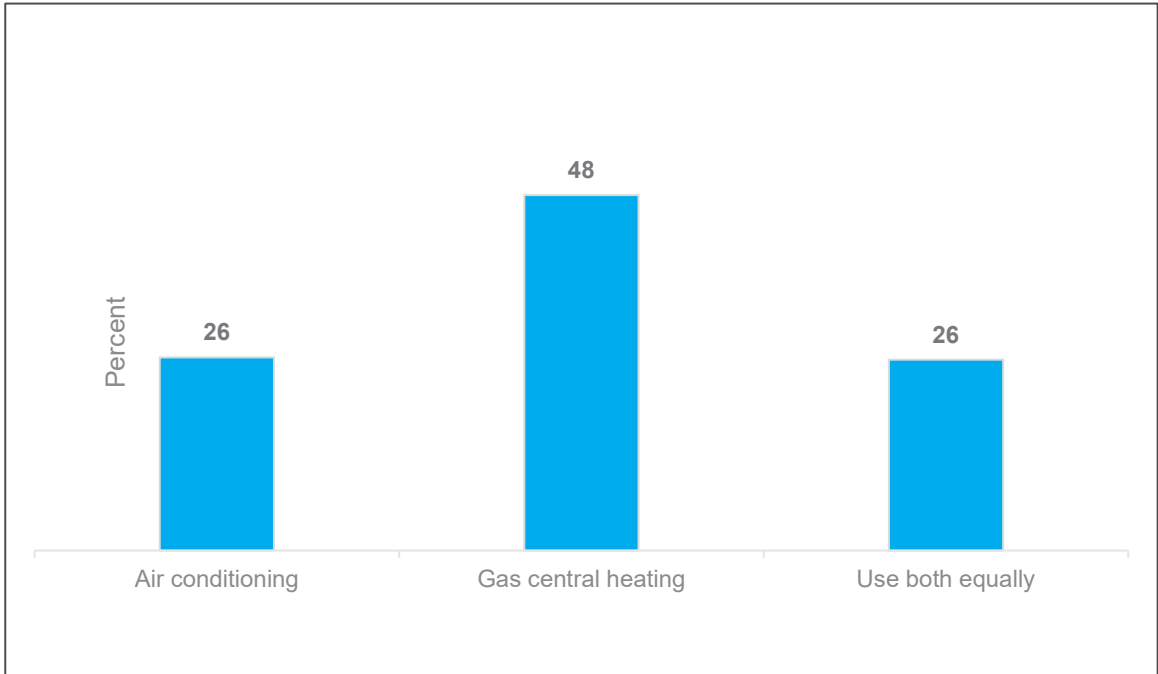


## The choice between air conditioning & gas central heating

Household consumers with both air conditioning (that is used for both heating and cooling) and gas central heating are split in terms of which they say they use more often.

- 26% say that they mostly use air conditioning, while 48% use their gas more often.
- 26% report using both equally.

***You mentioned before that you have both air conditioning (for cooling and heating) and gas central heating. Which of those two do you use more often to heat your home? (%)***



Base: Household consumers with both air conditioning (for cooling & heating) and gas central heating (n=276)

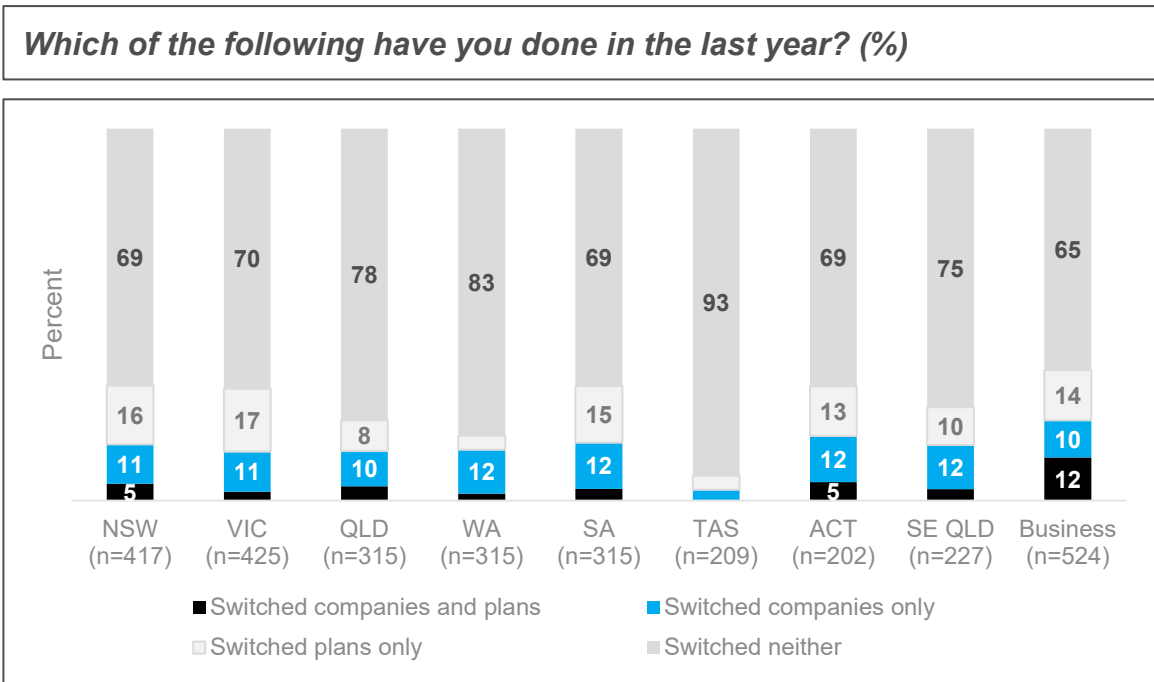
\*Breakdowns for individual states or for business consumers too small to be reported



## Recent switching

There are broadly similar proportions of recent switching activity in deregulated markets.

- Switching activity among the states with retail competition was - Victoria (30%), New South Wales (32%), South East Queensland (25%), and South Australia (31%).
- Small business consumers were more likely to have switched companies or plans in the past year (36%).



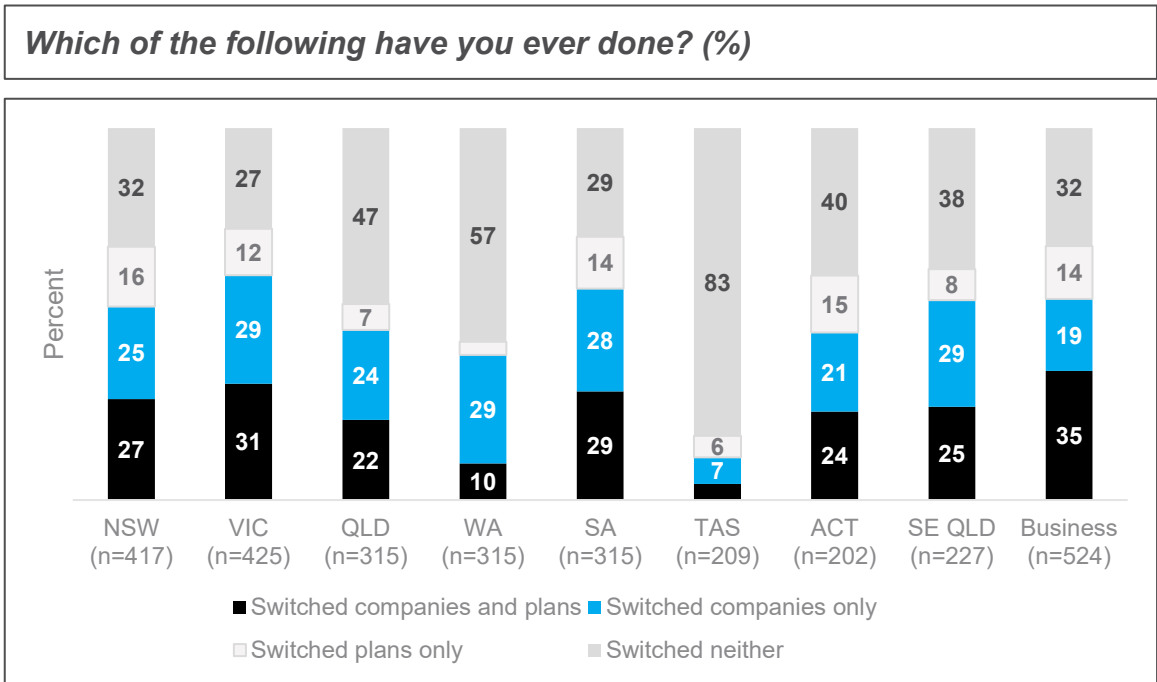
Note: For readability, percentages have been omitted where they are less than 5%

Activity

### Switching history

A large number of consumers report never having switched energy companies or plans.

- Even in deregulated markets, around one-in-three consumers report never having switched companies or plans (closer to 1 in 4 in SEQ).



Note: For readability, percentages have been omitted where they are less than 5%

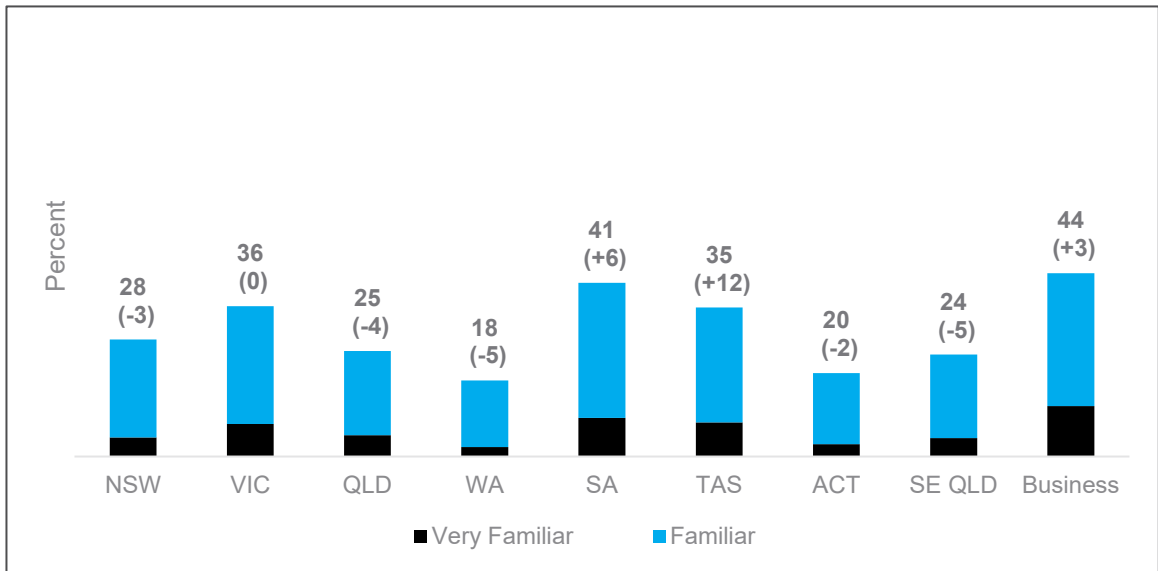
Other

## Awareness of the Energy Ombudsman

**Awareness of the Energy Ombudsman is highest among small businesses, South Australians, Victorians and Tasmanians.**

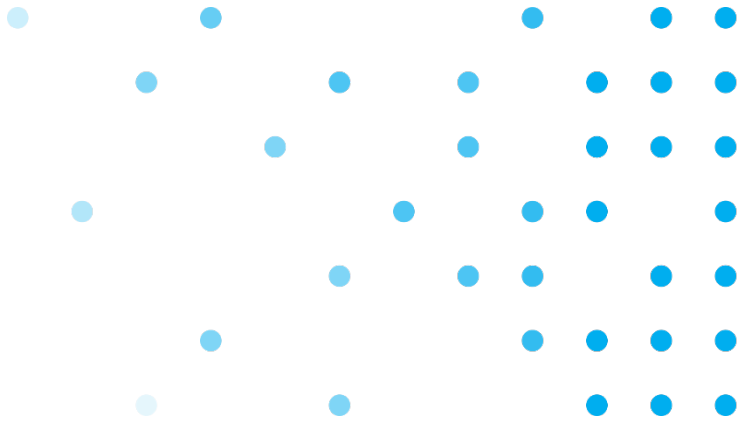
- 44% of small business consumers say they are familiar with the Ombudsman, up 3%.
- 41% of South Australians, 36% of Victorians and 35% of Tasmanians claim familiarity with the Energy Ombudsman.

***“How familiar are you with an organisation called the Energy Ombudsman, which assists consumers with complaints about energy?”  
(%)***



*Note: The figure is the aggregate of 'Very Familiar' and 'Familiar'*

# Small business



# Satisfaction

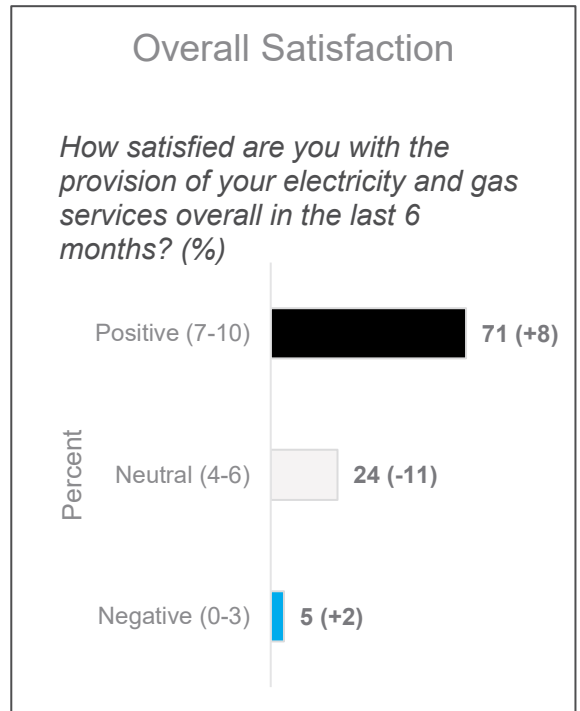
## Overall satisfaction

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

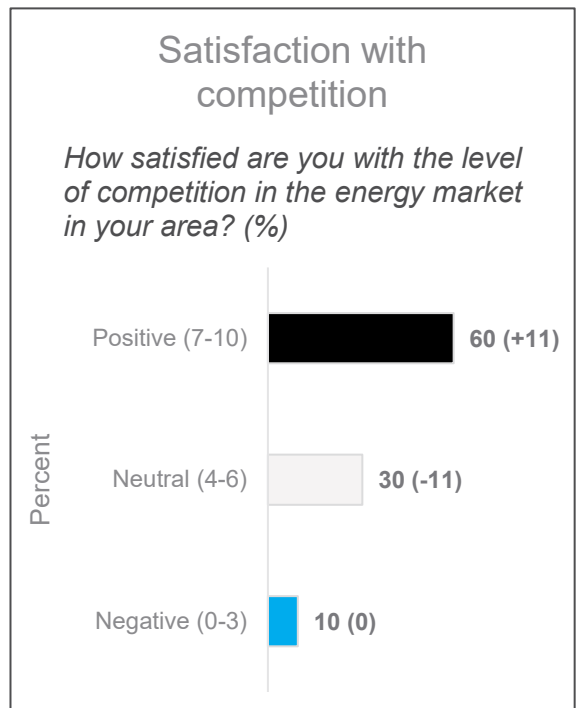
- 71% now say they are satisfied, up 8%.

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

- 60% now report being satisfied with competition in the energy market, up 11% from this time last year.



Base: Small businesses (n=524)



Base: Small businesses (n=524)

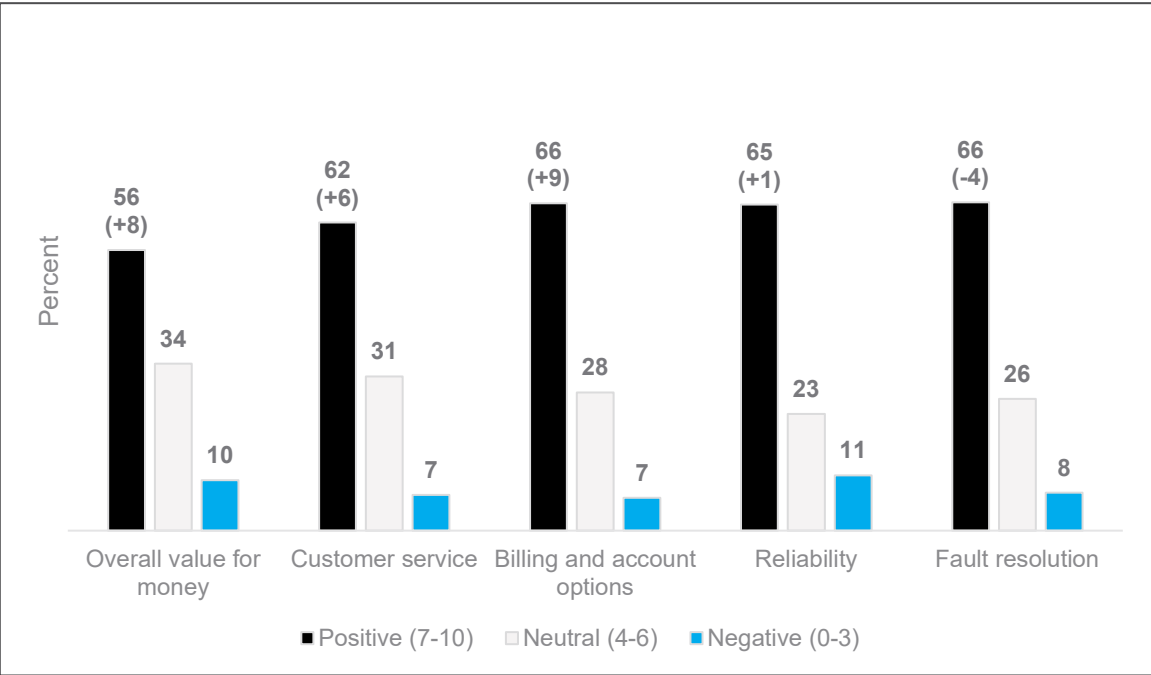
Satisfaction

### Satisfaction with electricity

Ratings from small business consumers have increased for overall value for money, customer service, and billing and account options.

- Satisfaction with value for money for electricity services is up 8%, which means that more than half (56%) of small business respondents gave a positive ranking on this measure.
- The only measure where satisfaction was lower compared with a year ago was for fault restoration, down 4% (to 66%).

*How would you rate the [attribute]? (%)*  
*0-10 scale, 0='not at all satisfied', 10='very satisfied'*



Base: Small businesses with electricity supply (n=524)  
Base for fault resolution: Small businesses who rated 0 to 9 satisfaction and had a power outage (n=341)

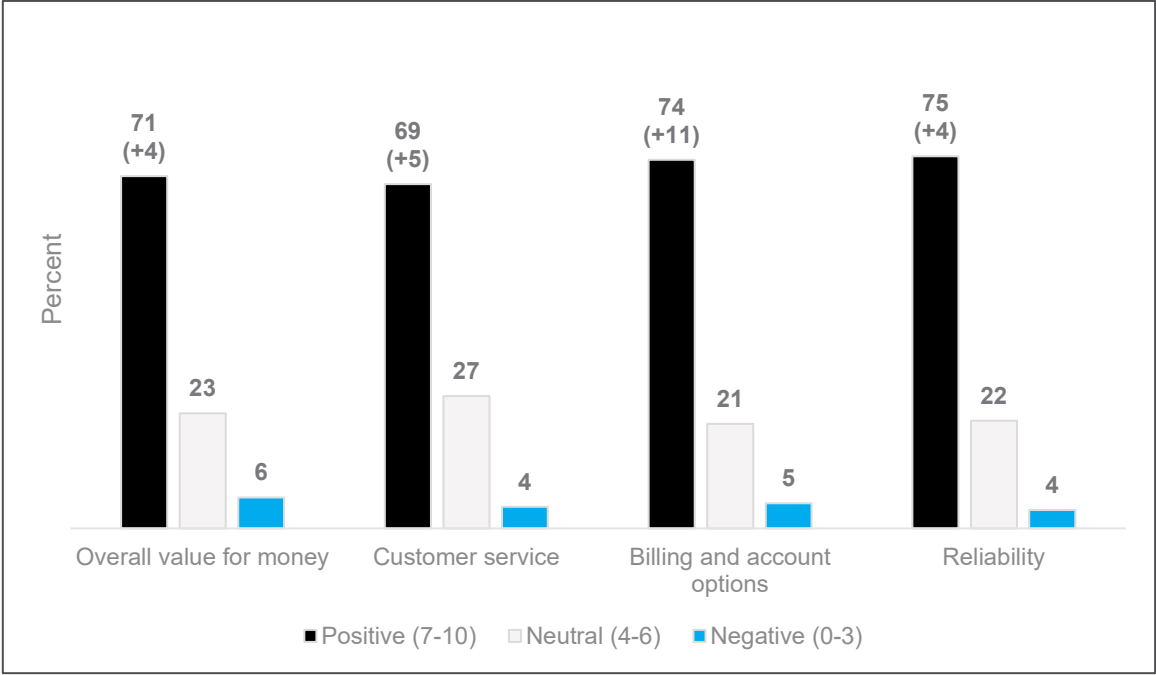
Satisfaction

### Satisfaction with gas

Small business consumers' satisfaction ratings for gas have increased on all measures.

- Satisfaction with billing and accounts saw the largest increase in ratings (up 11% to 74%).
- All other measures recorded a modest increase, with overall value for money up 4%, customer service up 5% and reliability up 4%.

*How would you rate the [attribute]? (%)*  
*0-10 scale, 0='not at all satisfied', 10='very satisfied'*

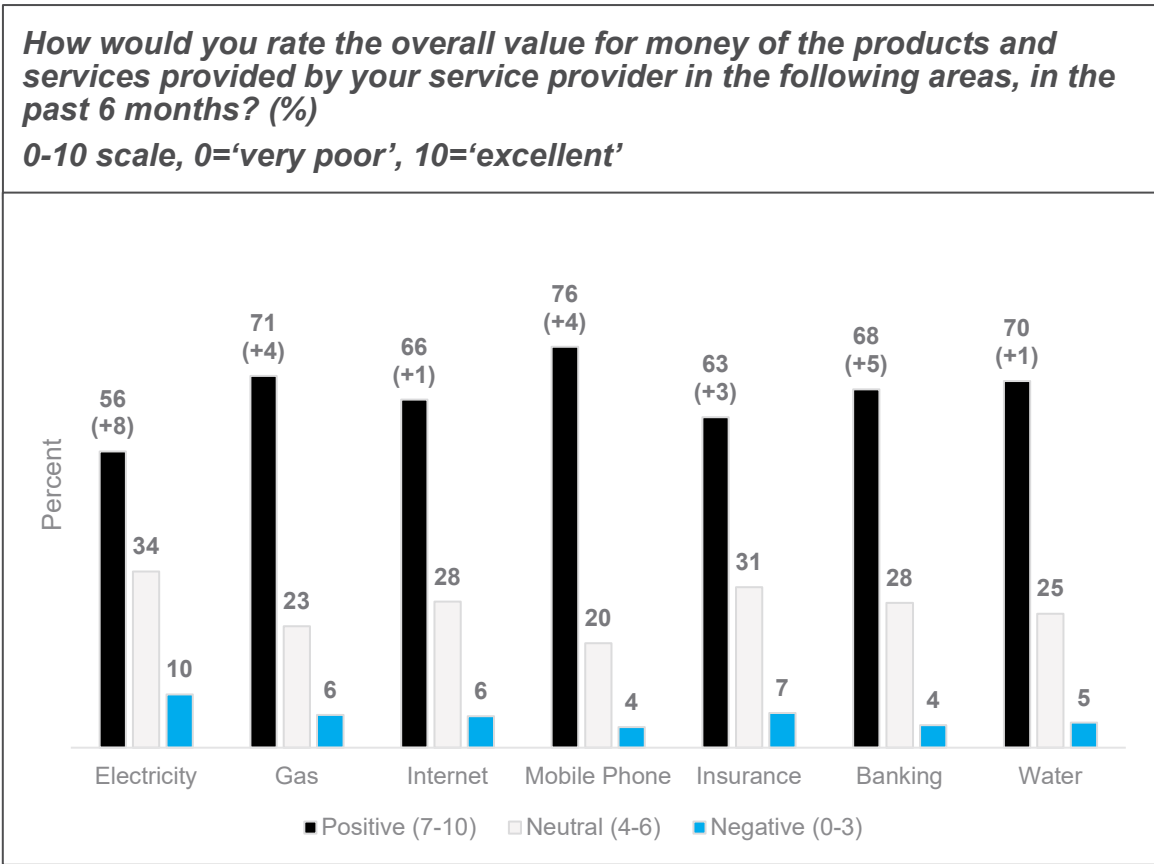


Base: Small businesses with gas supply (n=329)

## Satisfaction with utilities and services

Small business consumers' rating of the value for money for electricity services has continued to narrow the gap to the rating of other utilities and services.

- 56% now have a positive rating of the value for money of their electricity service, an 8% increase.
- With a positive rating of 71% (up 4%), gas is among the utilities and services with the highest rating utilities, trailing only mobile phone services (76%).



Base: Small businesses (n=524)



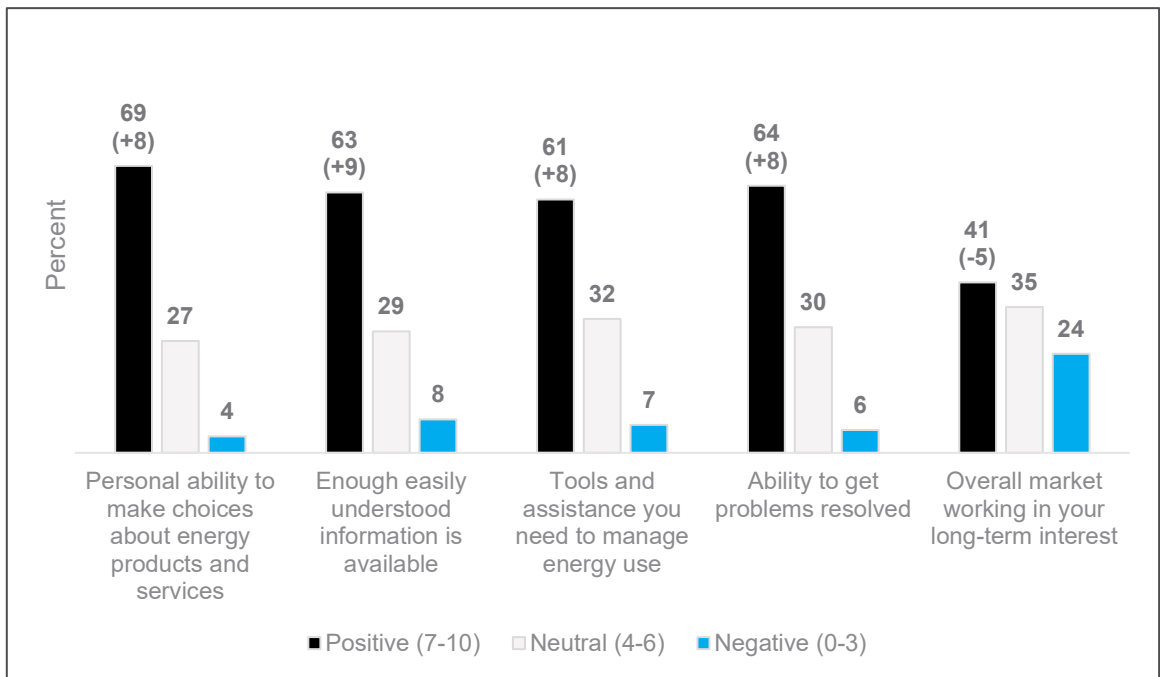
Confidence

## Confidence in information, tools and a working market

Small business consumers' confidence that the overall market is working has reduced even though all other confidence measures increased.

- Small business consumers' confidence that the overall market is working in their long-term interests decreased 5% to 41%.
- Small business consumers' confidence that there is enough easily understood information increased 9% to 63%, while their confidence to make choices about energy products and services, in their personal ability to get problems resolved and that they have the tools and assistance needed to manage their energy usage all recorded 8% increases.

*How would you rate the following? (%)*  
*0-10 scale, 0='not at all confident', 10='very confident'*



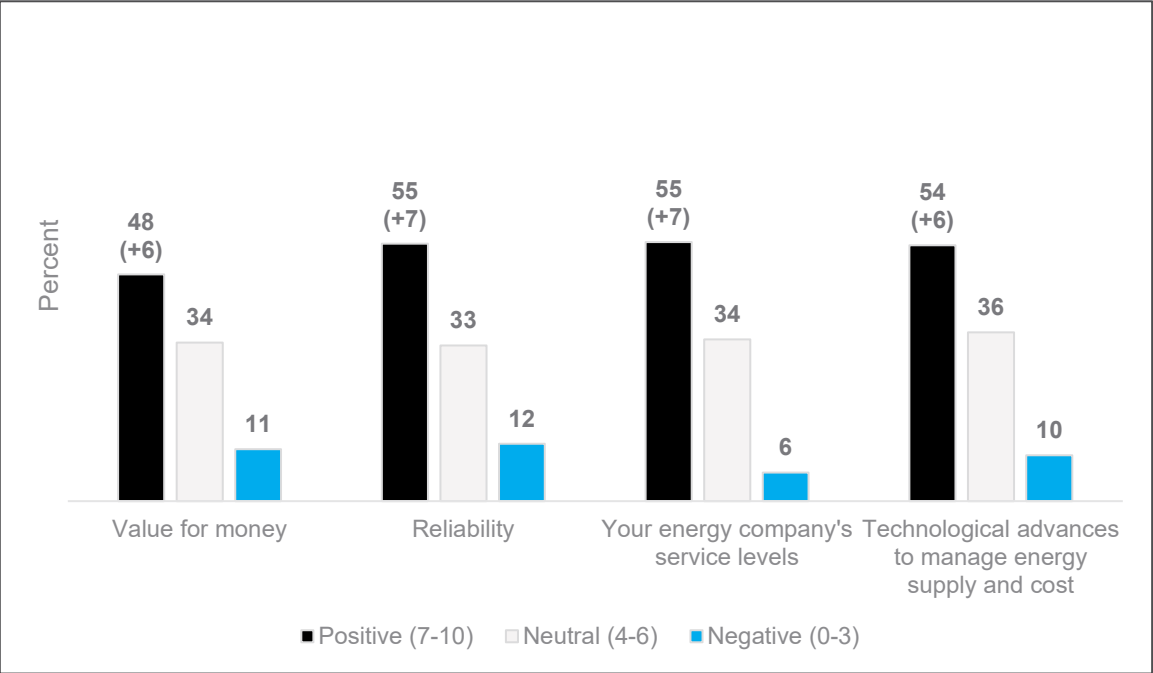
Base: Small businesses (n=524)

## Confidence in long-term outcomes

Small business consumers showed greater confidence in the long-term outcomes provided by the energy market compared to last year's survey.

- The proportion confident that the market will deliver better value for money in the long term is up 6% to 48%.
- There is also an increase in the proportion confident that reliability and their energy company's service levels will improve (both up 7% to 55%) and that technological advances to manage energy supply and cost will improve (up 6% to 54%).

**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'**

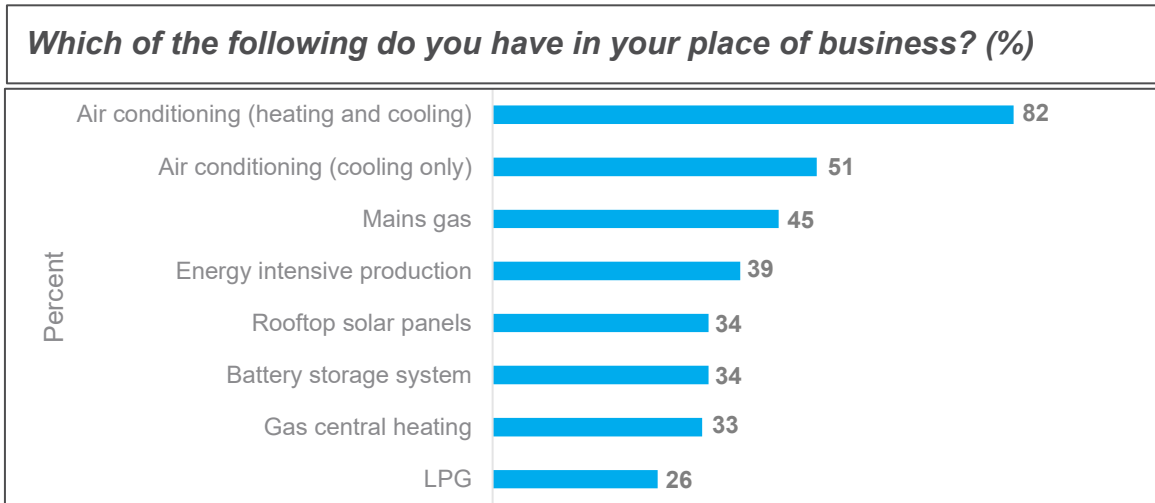


Base: Small businesses (n=524)

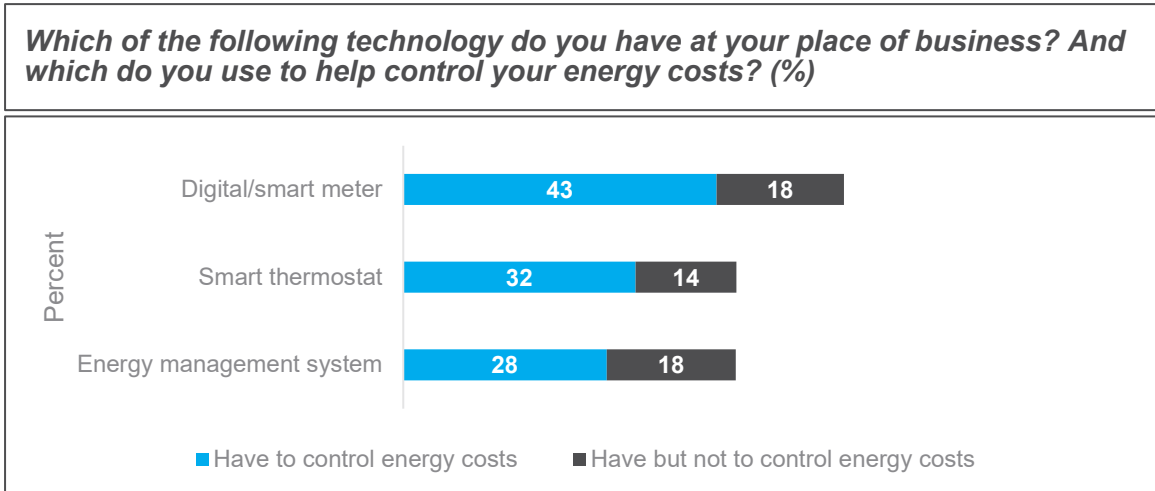
## Uptake of technologies

Small business consumers in this survey use a range of technologies to control energy costs.

- 61% of small business consumers say they have a digital/smart meter, and 43% say they use one to control energy costs.
- 46% say they have a smart thermostat, and 32% say they use one to control energy costs.
- 46% say they have an energy management system, and 28% say they use one to control energy costs.



Base: Small business consumers who have a primary place of business that is not their home (n=304)

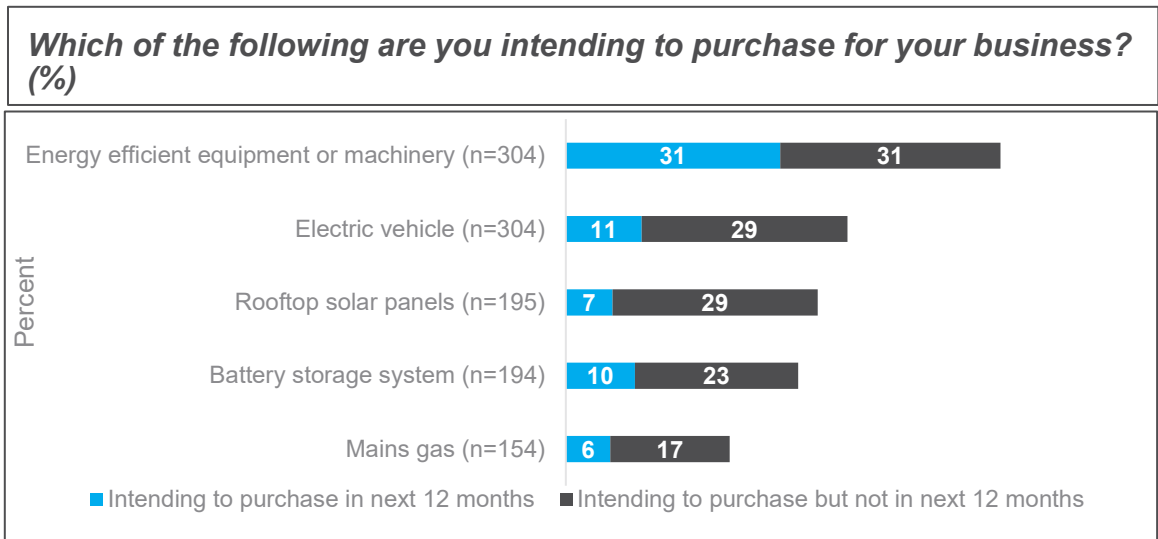


Base: Small business consumers who have a primary place of business that is not their home (n=304)

## Future uptake of technologies

There is a strong interest among small business consumers in purchasing new technology in the future.

- 62% say they are intending to purchase energy efficient appliances for their business, with half of those saying they plan to do so in the next 12 months (31%).
- 40% of small businesses say they are planning to purchase an electric vehicle, and 11% intend to do so in the next 12 months.
- 36% of small businesses who do not currently have solar panels say they are planning to purchase them, and 7% intend to do so in the next 12 months.
- 33% of small businesses who do not currently have battery storage say they intend to purchase a system, and 10% intend to do to so in the next 12 months.



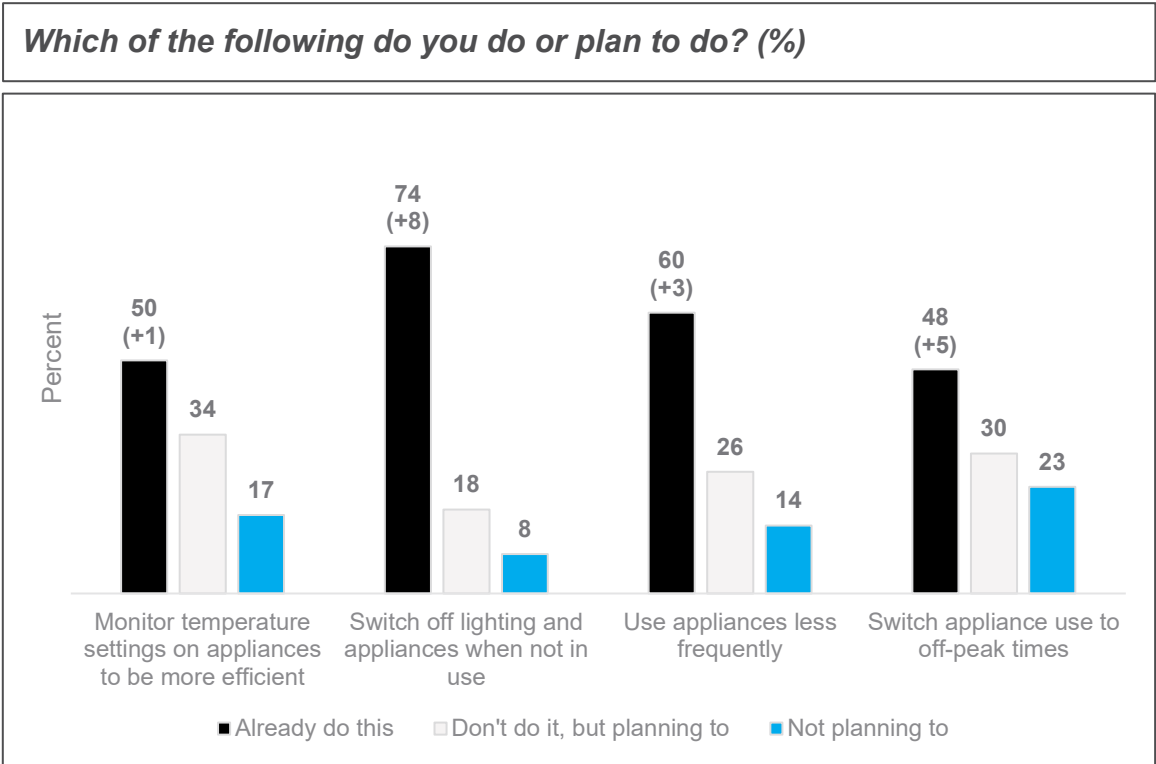
Base: Small business consumers who have a primary place of business that is not their home (n=304)

Note: Other than 'energy efficient appliances' and 'electric vehicles', figures are the percentage of those who do not already have that technology in their business.

## Reducing energy use

Switching off lighting and appliances and using appliances less frequently are the most common ways that small businesses are reducing their energy use.

- 74% switch off lighting and appliances when not in use (up 8%).
- 60% are using appliances less frequently (up 3%).
- 50% are monitoring temperature settings on appliances (up 1%).
- 48% say they are switching appliance use to off-peak times (up 5%).



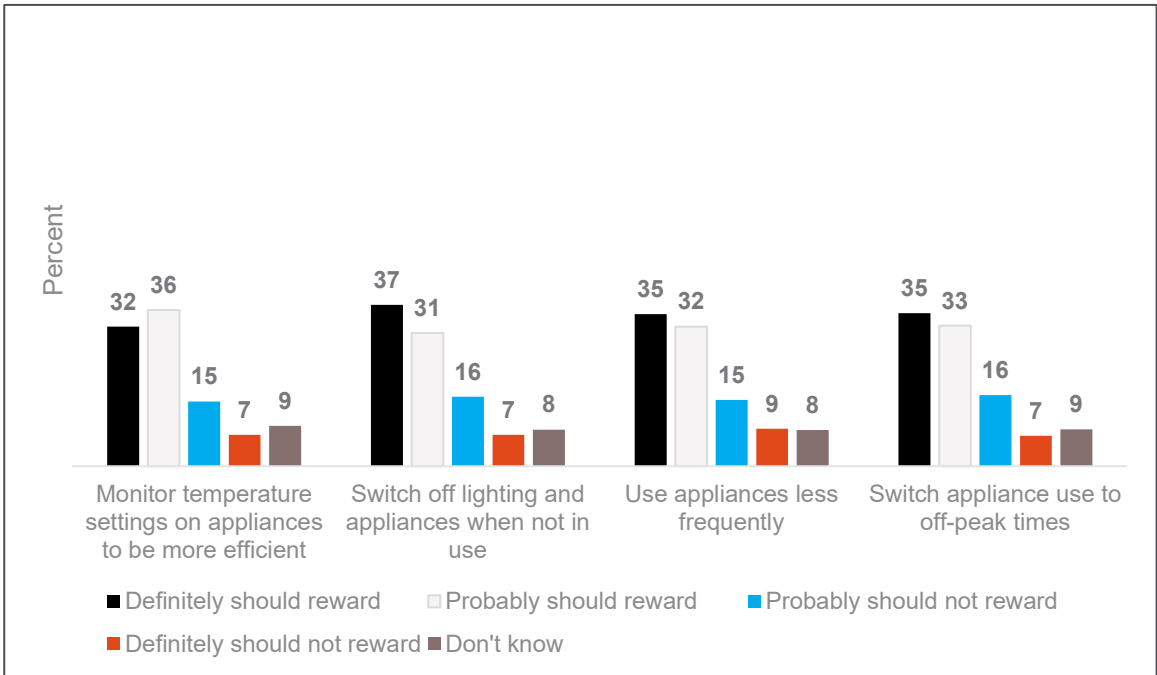
Base: Small businesses (n=524)

## Reward for reducing energy use

**A growing majority of small business consumers think customers should be rewarded for acting to reduce their energy usage.**

- 68% think electricity companies should do more to financially reward customers who switch off lighting and appliances when not in use ( up 9%).
- 68% think electricity companies should do more to financially reward customers who switch appliance use to off-peak times (up 10%).
- 67% think electricity companies should do more to financially reward customers who use appliances less frequently (up 9%).
- 68% think electricity companies should do more to financially reward customers who monitor temperature setting on appliances to be more efficient (up 10%).

***Should electricity companies do more to financially reward customers who do the following: (%)***



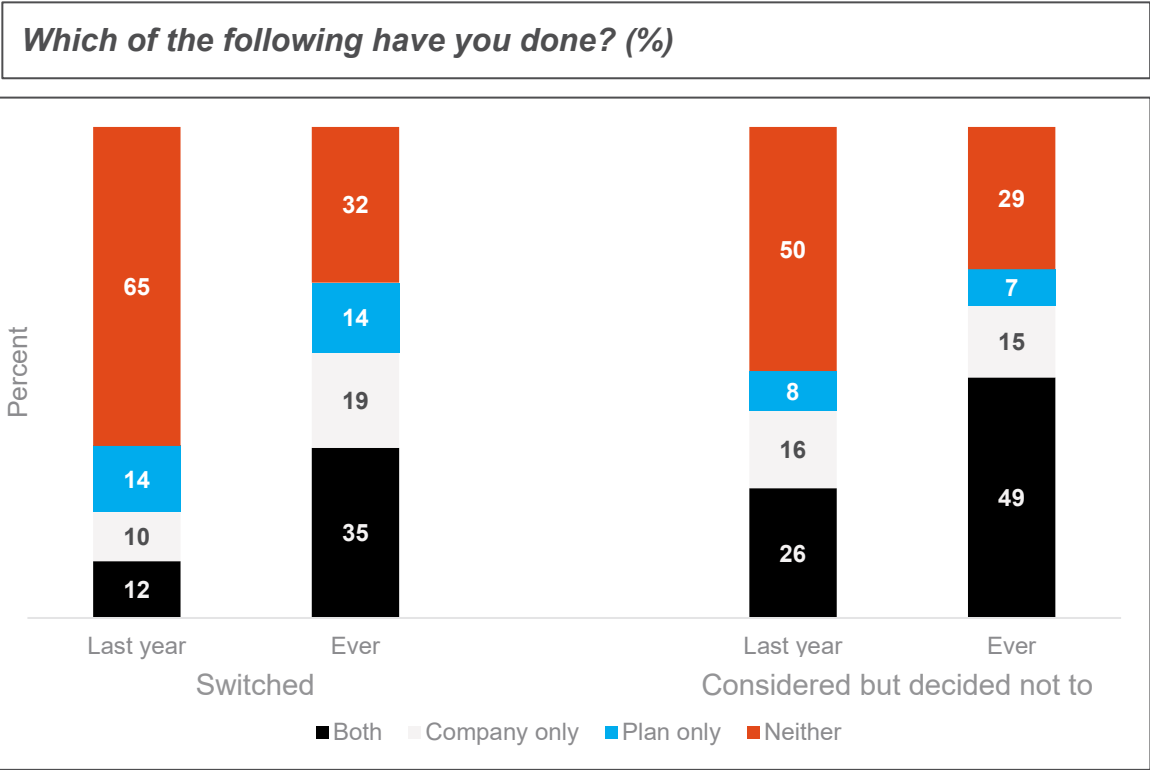
Base: Small businesses (n=524)

Activity

### Switching behaviour

The proportion of small business consumers that report having switched plan and/or company in the past 12 months (36%) is slightly larger than the proportion that reports that they have never switched (32%).

- 29% say they have never considered switching energy companies or plans.
- 49% say they considered switching plan and/or company in the past year but decided not to.



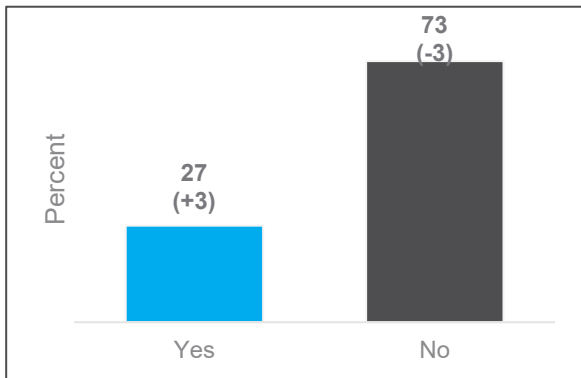
Base: Small businesses (n=524)

## Reasons for considering switching

The main driver for switching was searching for a better plan.

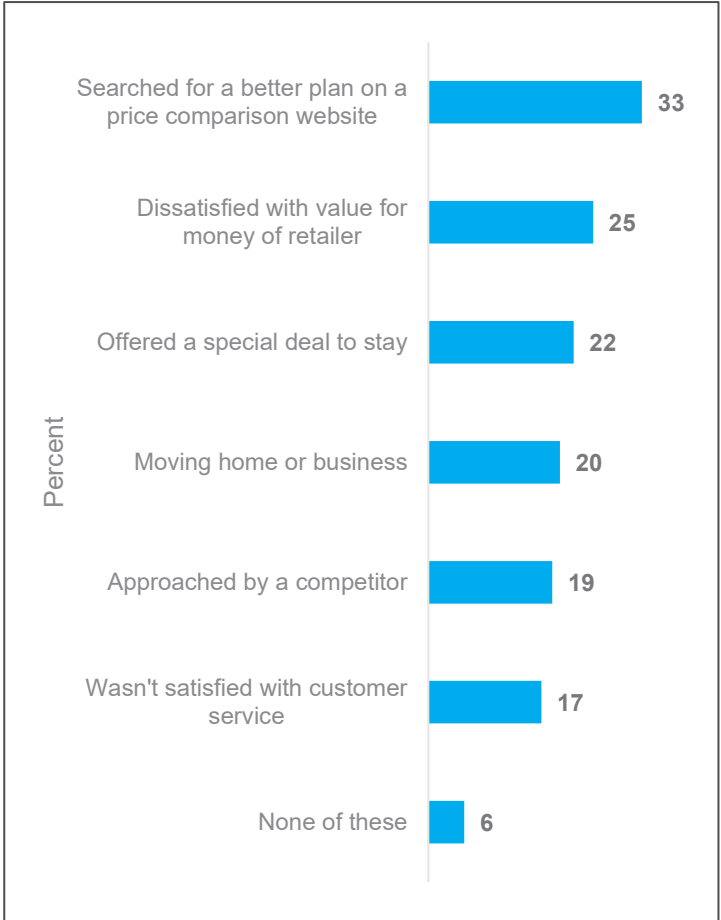
- 33% said that they looked for a better plan on a price comparison website the last time they looked at switching energy companies.
- 27% plan to switch energy companies in the next year.

**Do you intend to switch energy companies or energy plans in the next year? (%)**



Base: Small businesses (n=524)

**Thinking of the last time you were looking at switching energy companies, which of the following apply to you? (%)**



Base: Small businesses (n=524)



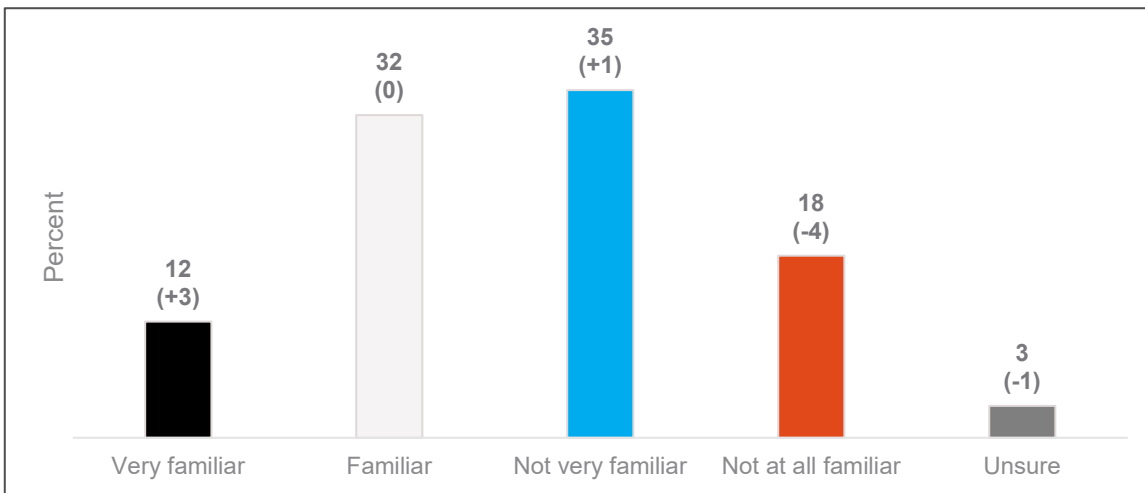
Other

## Awareness of the Energy Ombudsman

Awareness of the Energy Ombudsman has slightly increased among small business consumers.

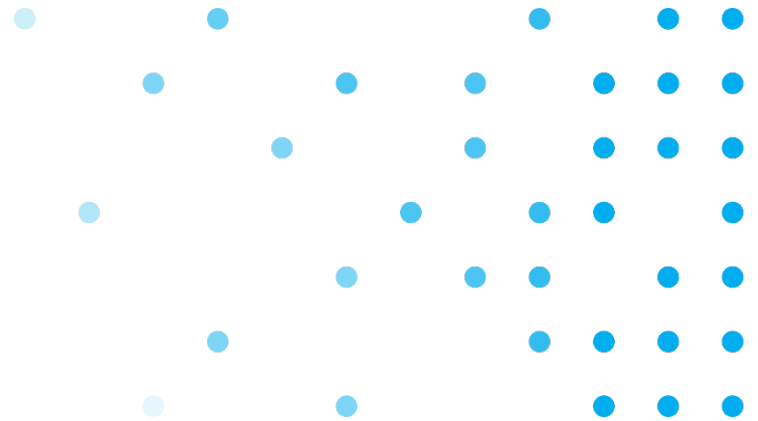
- 44% of small business consumers claim to be familiar with the Ombudsman, up 3%.

*How familiar are you with an organisation called the Energy Ombudsman, which assists consumers with complaints about energy? (%)*



Base: Small businesses (n=524)

# New South Wales





## Overall satisfaction

**Satisfaction with energy services among NSW household consumers has increased.**

- 77% are satisfied, up 7%.

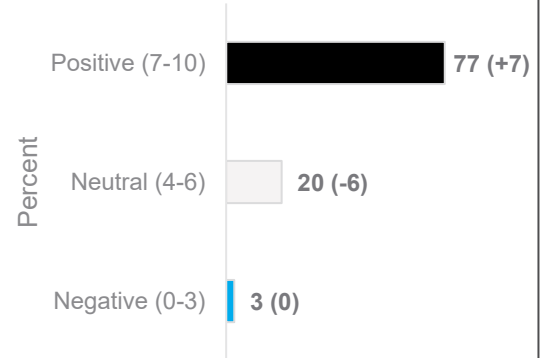
**Satisfaction with the level of competition has also gone up.**

- 60% say they are satisfied with the level of competition, up 11%.

## Satisfaction

### Overall Satisfaction

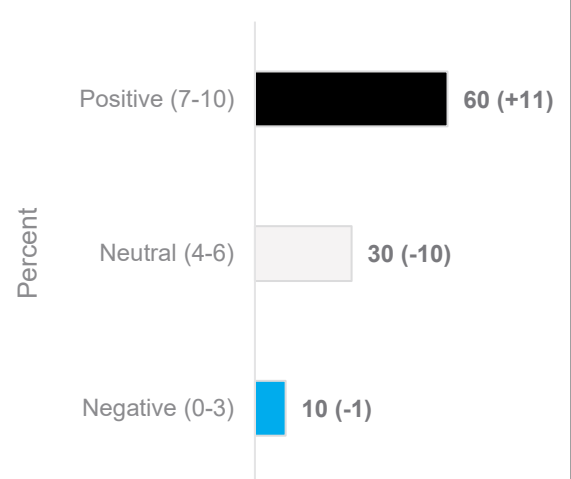
*How satisfied are you with the provision of your electricity and gas services overall in the last 6 months? (%)*



Base: Consumers in NSW (n=417)

### Satisfaction with competition

*How satisfied are you with the level of competition in the energy market in your area? (%)*



Base: Consumers in NSW (n=417)



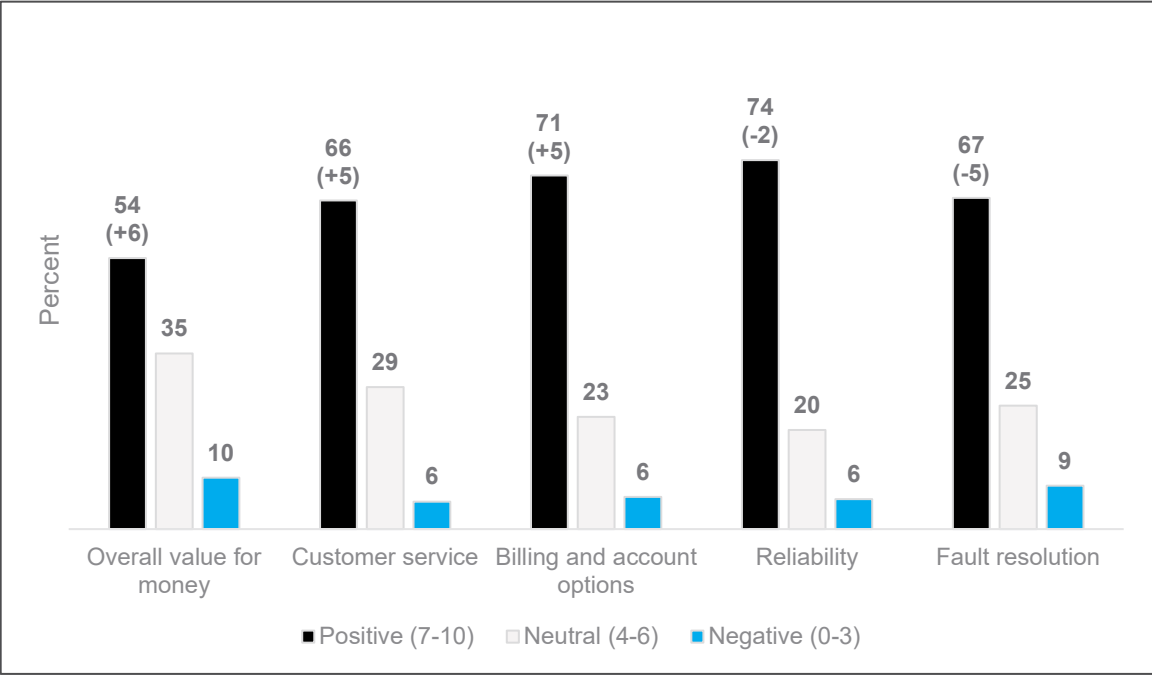
Satisfaction

## Satisfaction with electricity

### Satisfaction has increased across most measures in NSW.

- Increases in satisfaction were seen for overall value for money (up 6%), customer service, and billing and account options (both up 5%).
- Satisfaction with fault resolution decreased by 5% to 67%.
- Satisfaction with reliability decreased by 2% to 74% but this was still the highest rating.

*How would you rate the [attribute]? (%)*  
*0-10 scale, 0='not at all satisfied', 10='very satisfied'*



Base: Consumers in NSW with electricity supply (n=417)

Base for fault resolution: Those in NSW who rated 0 to 9 satisfaction and had a power outage (n=218)



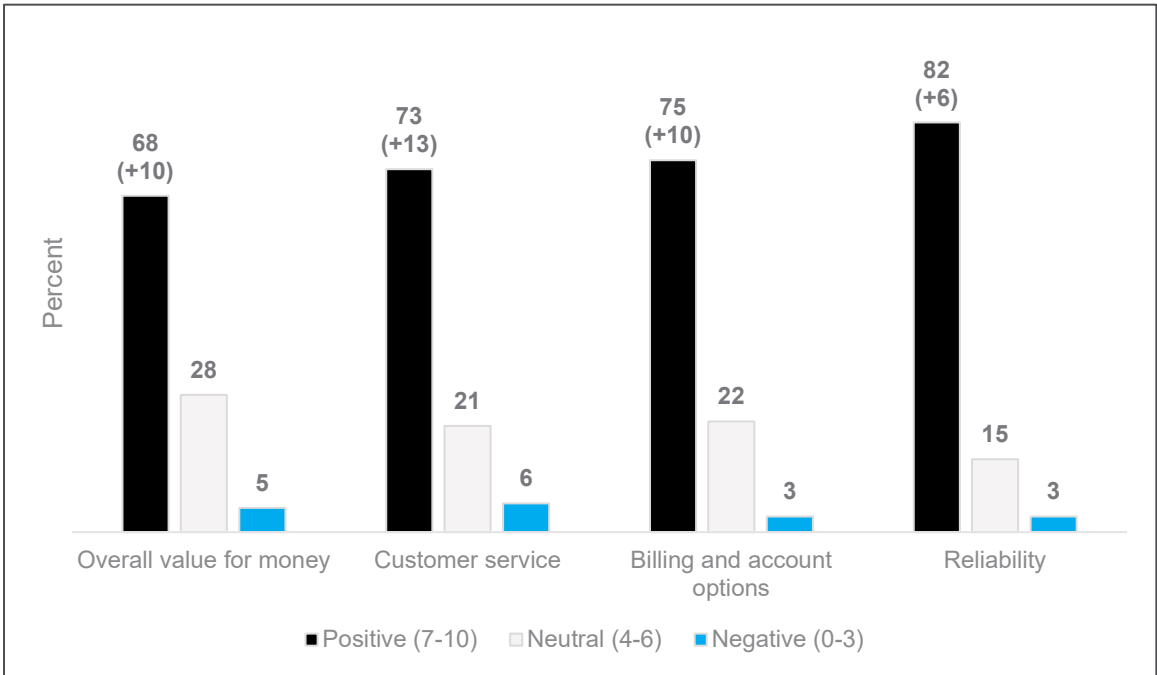
# Satisfaction

## Satisfaction with gas

**NSW consumers' satisfaction with gas services has increased across all measures.**

- 68% are satisfied with the value for money they get for gas (up 10%).
- 73% are satisfied with their gas company's customer service (up 13%).
- 75% are satisfied with their billing and account options (up 10%).
- 82% are satisfied with reliability of their service (up 6%).

*How would you rate the [attribute]? (%)*  
*0-10 scale, 0='not at all satisfied', 10='very satisfied'*



Base: Consumers in NSW with gas supply (n=167)

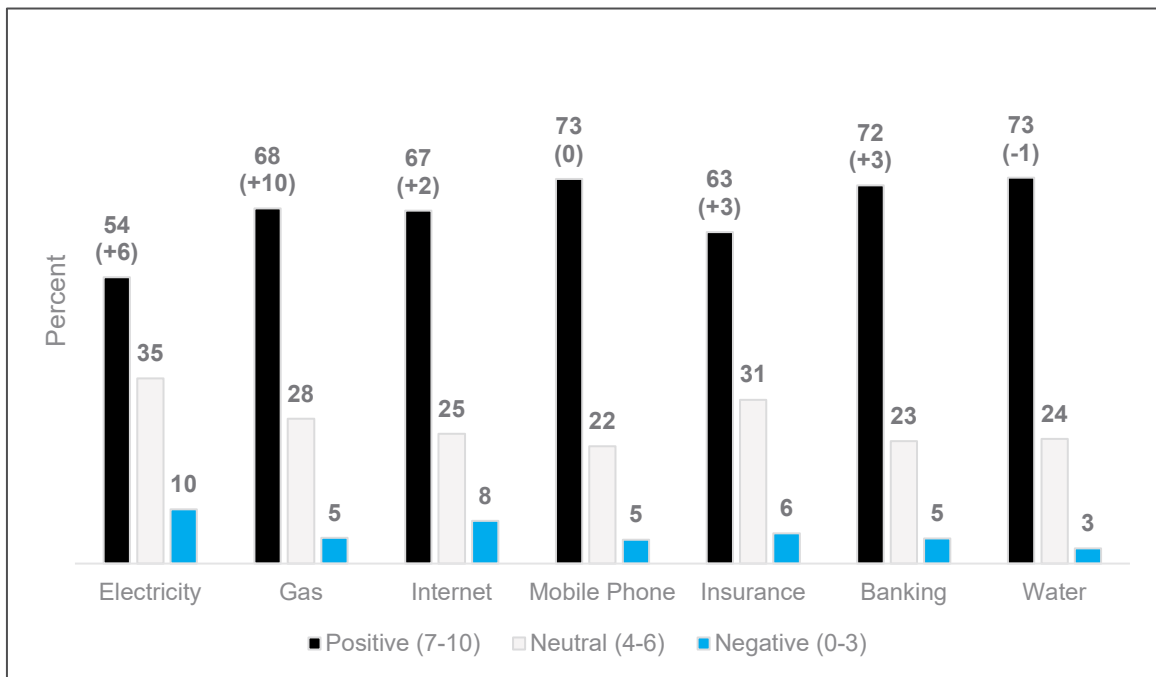


## Satisfaction with utilities and services

NSW household consumers were more satisfied with their electricity services than previously, but still rate it behind all other utilities and services.

- Households' satisfaction with their electricity service has increased 6%, to 54%, but this is still behind the next lowest-rated utility – insurance (63%).
- Satisfaction with gas services has increased 10% to 68%.

**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? (%)**  
**0-10 scale, 0='very poor', 10='excellent'**



Base: Consumers in NSW (n=417)

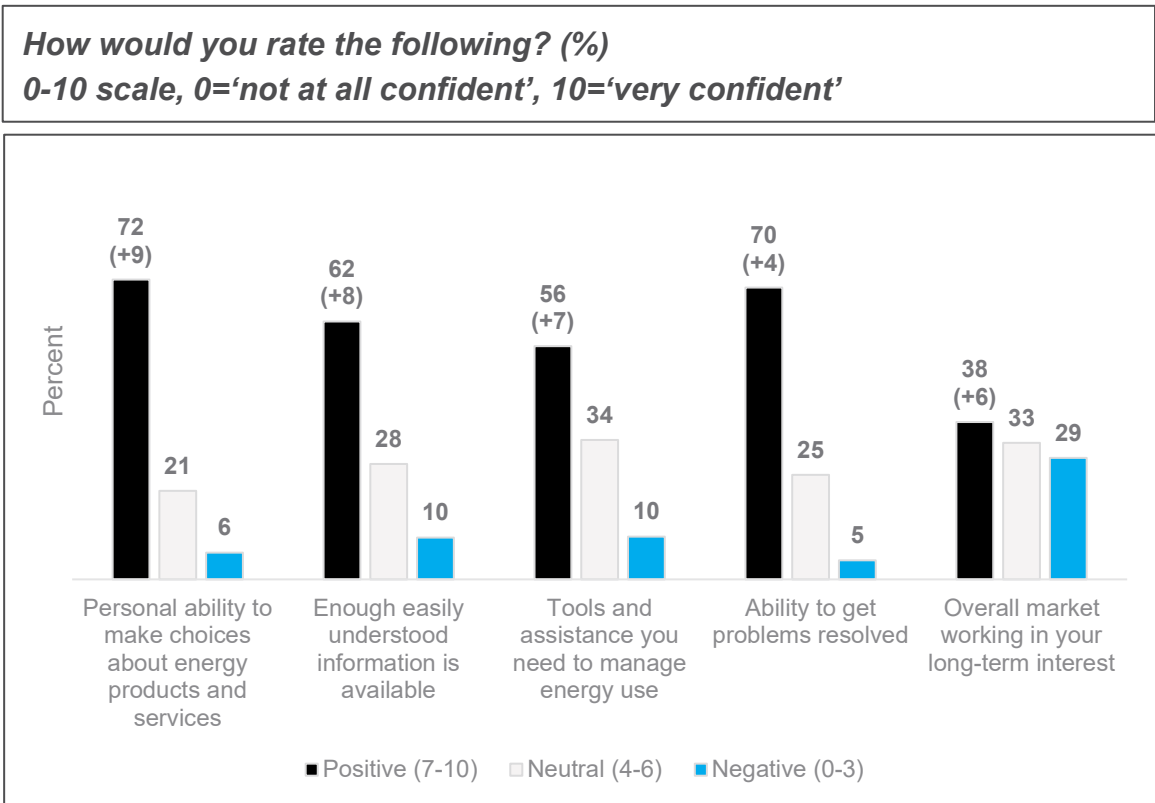


Confidence

## Confidence in information, tools and a working market

Confidence among NSW consumers has increased for all measures.

- 72% are now confident in their personal ability to make choices about energy products and services (up 9%); and 70% are confident in their ability to get problems resolved (up 4%).
- 62% say they are confident there is enough easily understood information available to make choices about energy services (up 8%); and 56% say they are confident they have the tools and assistance they need to manage their energy use and costs (up 7%).
- The proportion who think that the overall market is working in their long-term interests has increased by 6% from a low base of 32% (to 38%).



Base: Consumers in NSW (n=417)

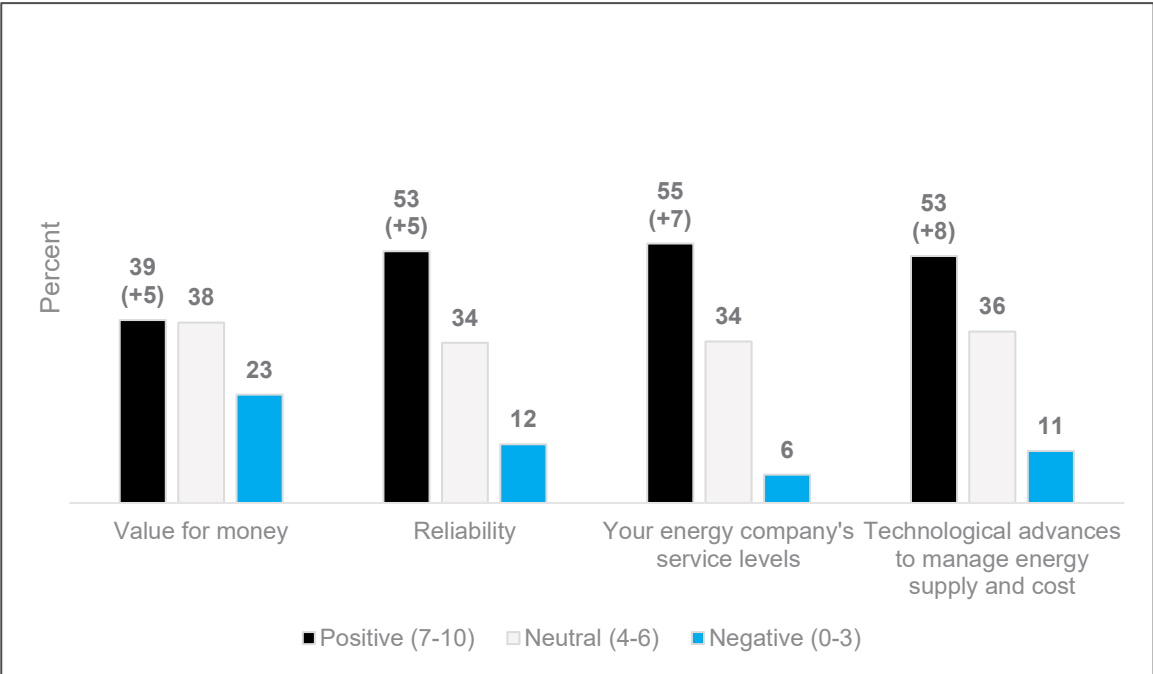


## Confidence in long term outcomes

Consumer confidence in long term outcomes has increased off a low base and confidence in future value for money continues to lag other measures.

- 39% of NSW household consumers say they are confident that value for money outcomes will improve in the future (up 5% compared to last year).
- 55% say they are confident their energy company's service levels will improve in the future (up 7%).
- 53% say they are confident in the likelihood of future technological advances to manage energy supply (up 8%).
- 53% say they are confident in the reliability of their energy service improving (up 5%).

**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'**



Base: Consumers in NSW (n=417)



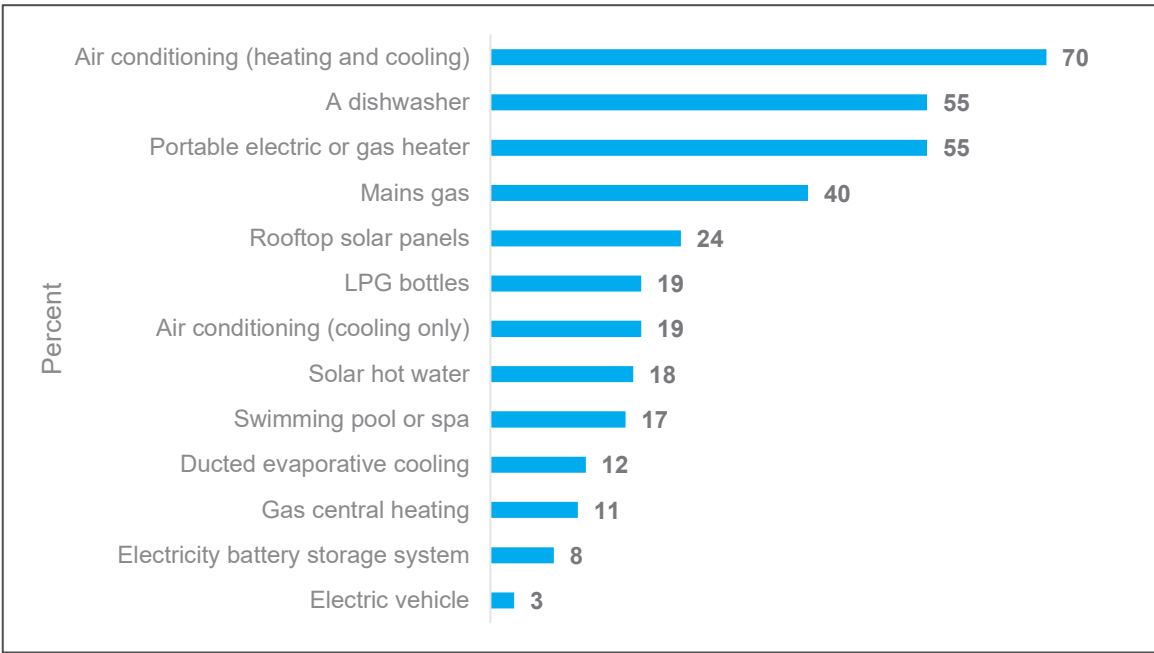


## Uptake of technologies

A quarter of consumers in NSW report having rooftop solar panels.

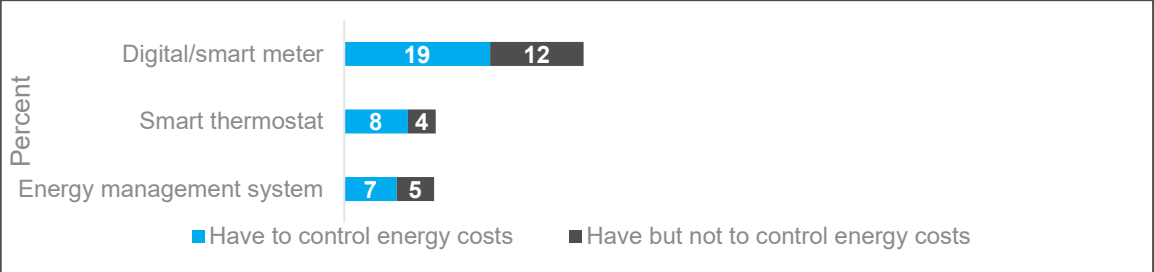
- 31% say they have a digital/smart meter, and over half of these consumers use it to manage their energy use and costs (19%).

**Which of the following do you have at your home? (%)**



Base: Consumers in NSW (n=417)

**Which of the following technology do you have at your home? And which do you use to help control your energy costs? (%)**



Base: Consumers in NSW (n=417)

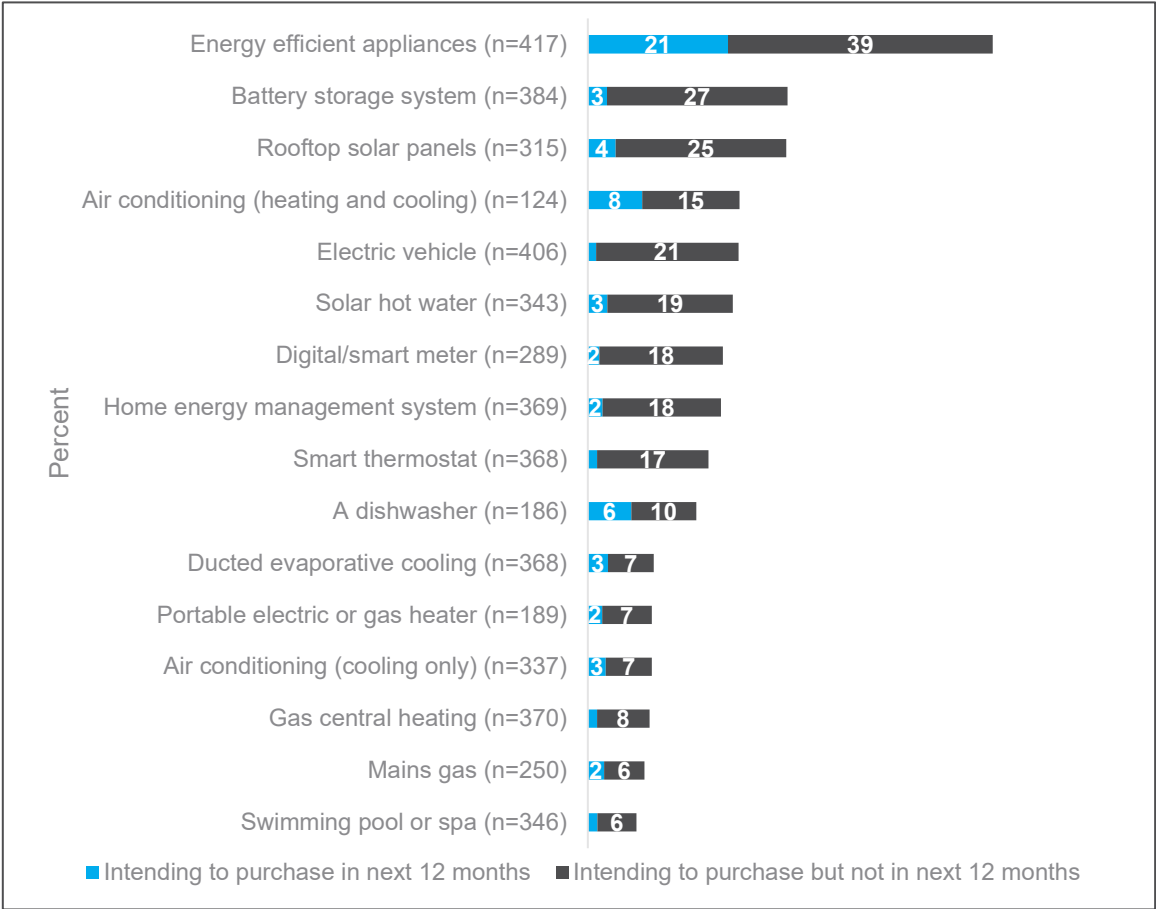


## Future uptake of technologies

**NSW household consumers show interest in purchasing more energy efficient appliances, but mostly not in the next 12 months.**

- Of the households who report having solar panels, 62% have expressed interest in adding electricity battery storage systems to their homes.
- 60% say they intend to purchase energy efficient appliances and 21% plan to do so in the next 12 months.
- Of those who do not already have rooftop solar, 29% say they intend to install solar panels (4% in the next 12 months), and 30% of those without battery storage plan to purchase a system (3% in the next 12 months).

**Which of the following are you intending to purchase for your home? (%)**



Note: Other than 'energy efficient appliances' which was asked of the entire sample, figures are the percentage of those who do not already have that technology in their home in New South Wales

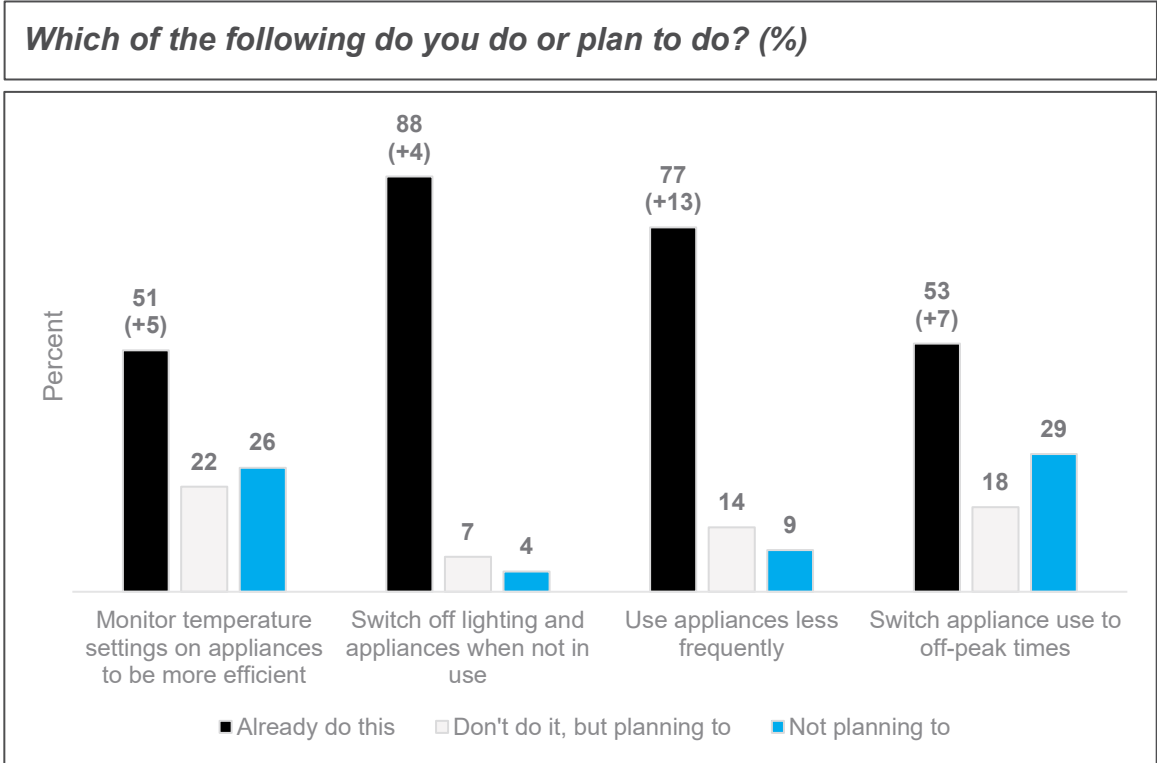
Note: For readability, percentages have been omitted where they are less than 2%



## Energy saving practices

The proportion of NSW household consumers who say they are already undertaking energy saving practices has increased, and fewer now say they don't plan to undertake energy saving practices.

- 88% say they already switch off lighting and appliances when not in use (up 4%).
- 77% say they already use appliances less frequently to conserve energy (up 13%).
- 53% say they already switch appliance use to off-peak times (up 7%).
- 51% say they monitor temperature settings on appliances to be more efficient (up 5%).



Base: Consumers in NSW (n=417)

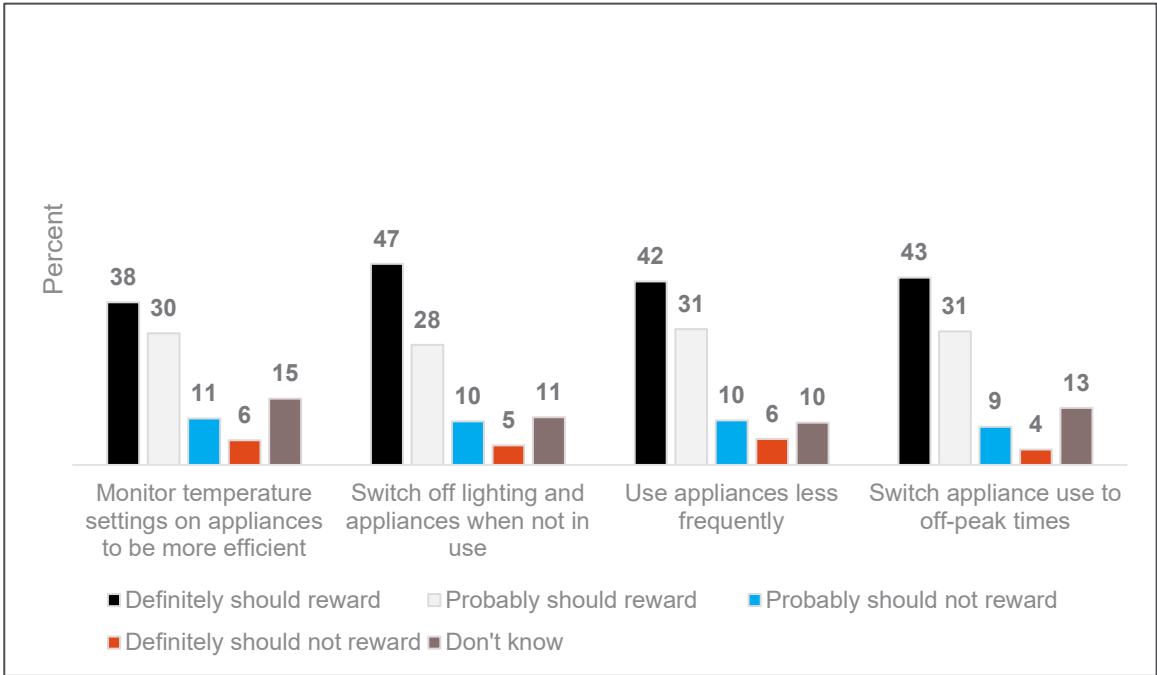


## Reward for reducing energy use

All identified means by which customers could be rewarded for taking action to reduce their energy usage were supported by a large majority of NSW household consumers.

- 75% think electricity companies should do more to financially reward customers who switch off lighting and appliances when not in use (up 12%).
- 74% think electricity companies should do more to financially reward customers who switch appliance use to off-peak times (up 11%).
- 73% think electricity companies should do more to financially reward customers who use appliances less frequently (up 11%).
- 68% think electricity companies should do more to financially reward customers who monitor temperature settings on appliances to be more efficient (up 13%).

***Should electricity companies do more to financially reward customers who do the following: (%)***



Base: Consumers in NSW (n=417)

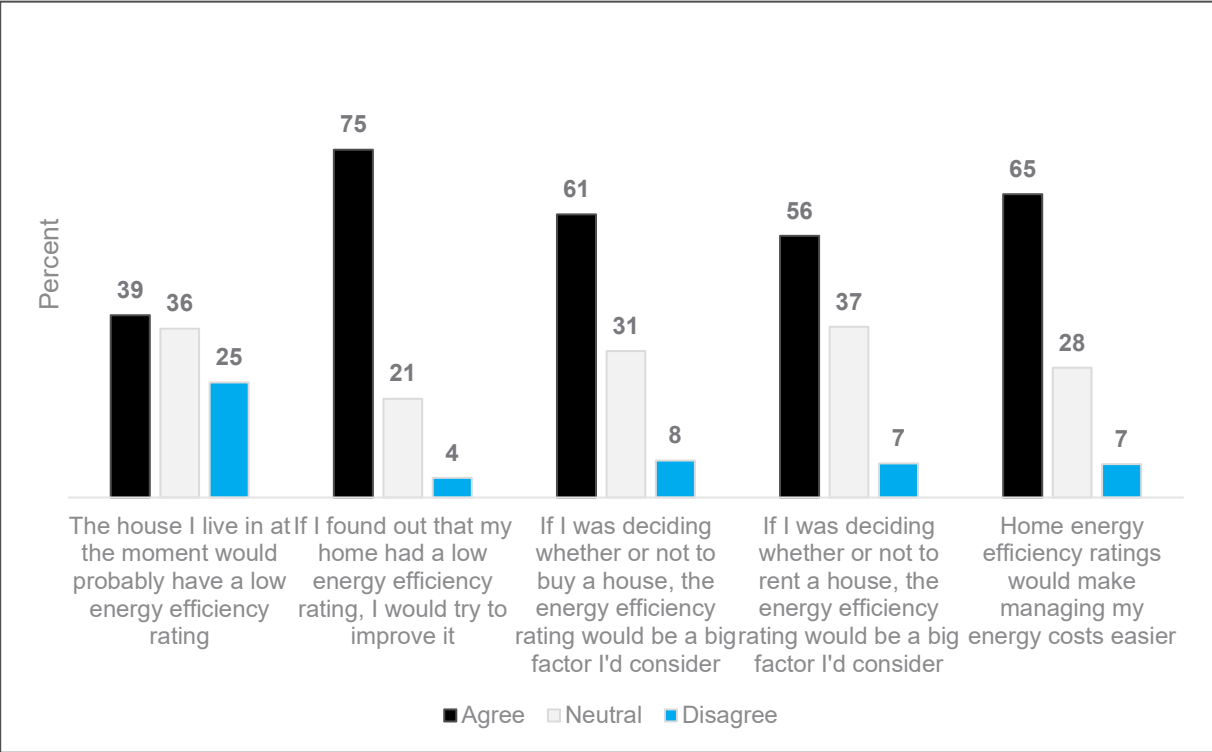


## Housing energy efficiency

**Most NSW consumers are interested in the energy efficiency of their home, but they do not generally believe their home is energy efficient.**

- 75% said they would try to improve their home’s energy rating if they found out it had a low rating (up 8%).
- 65% said that a home energy efficiency rating would make managing their energy costs easier (up 8%).
- 61% said that an energy rating would be a big factor they would consider when buying a house (up 7%).
- 56% of renters said that an energy rating would be a big factor they would consider when renting a house (up 2%).
- Only 25% disagree with the statement that the house they live in would have a *low* energy efficient rating.

**Do you agree or disagree with the following? (%)**



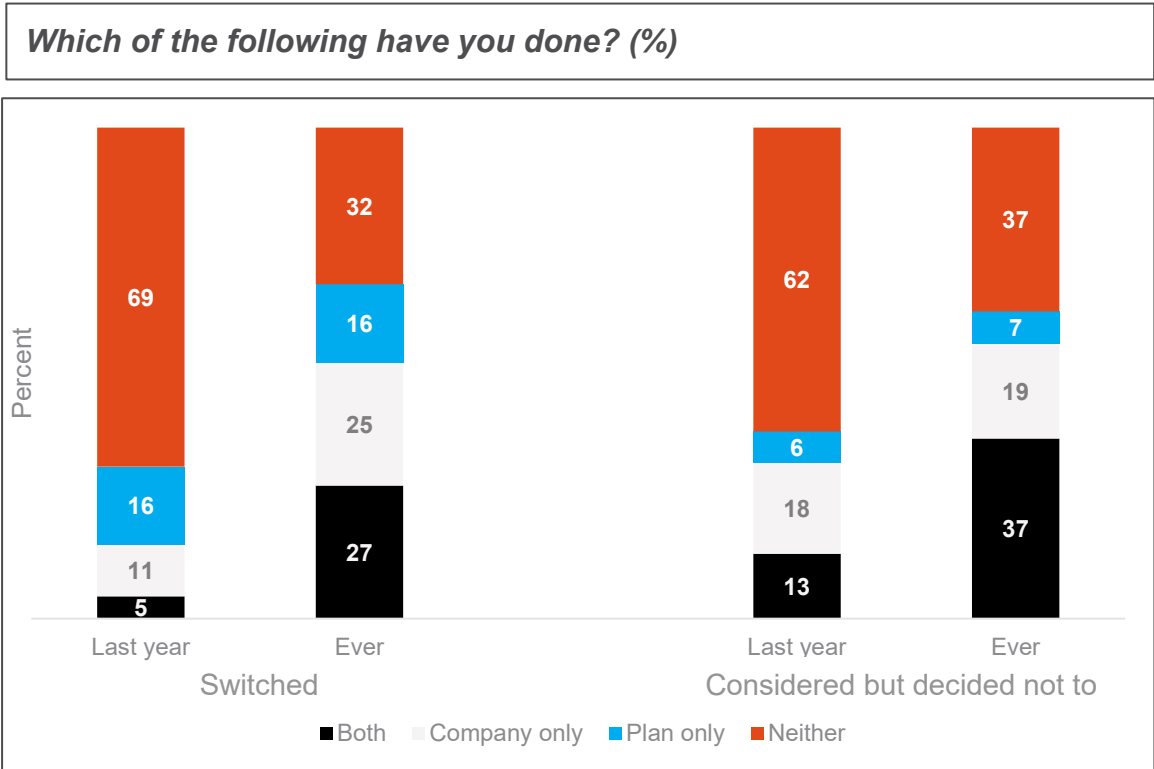
Base for 'current house having a low energy rating', 'consider energy rating when purchasing a home' and 'home energy ratings would make managing my energy costs easier': Consumers in NSW (n=417)  
 Base for 'I would try to improve my home energy efficiency': Home-owners in NSW (n=283)  
 Base for 'consider energy rating when renting': Renters in NSW (n=123)



## Switching behaviour

A third of NSW consumers have switched energy companies or plans in the past year.

- 32% say they have switched companies, plans or both in the past year.
- 32% report that they have never switched companies or plans.
- 37% say they considered switching companies or plans in the past year but did not actually do so at the time.



Base: Consumers in NSW (n=417)



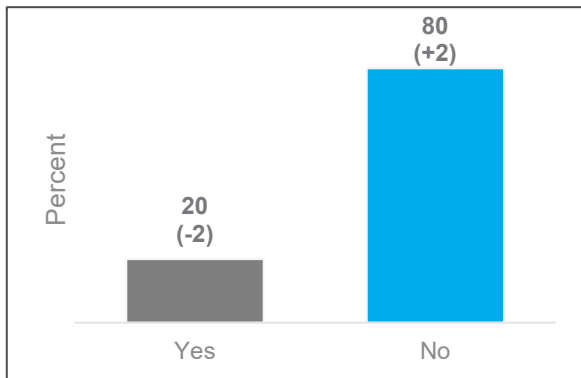
Activity

## Reasons for considering switching

**Dissatisfaction with value for money is the main driver for switching activity among NSW consumers.**

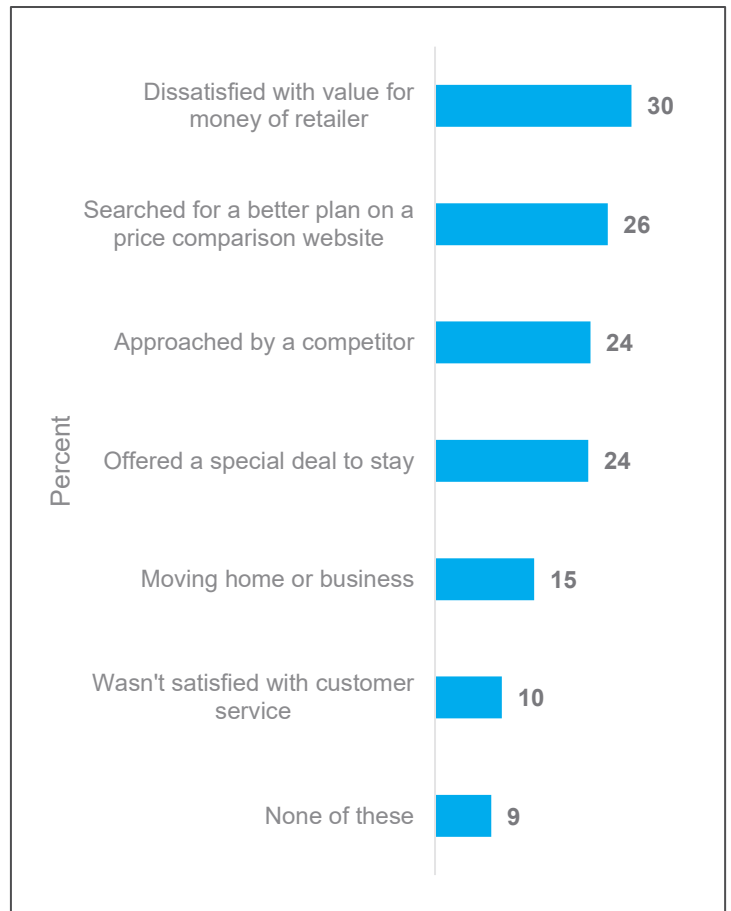
- 30% of those who have looked at switching in the past said that they were dissatisfied with the value for money they were receiving from their retailer.
- 20% say they intend to switch plans or retailers in the next year.

***Do you intend to switch energy companies or energy plans in the next year? (%)***



Base: Consumers in NSW (n=417)

***Thinking of the last time you were looking at switching energy companies, which of the following apply to you? (%)***



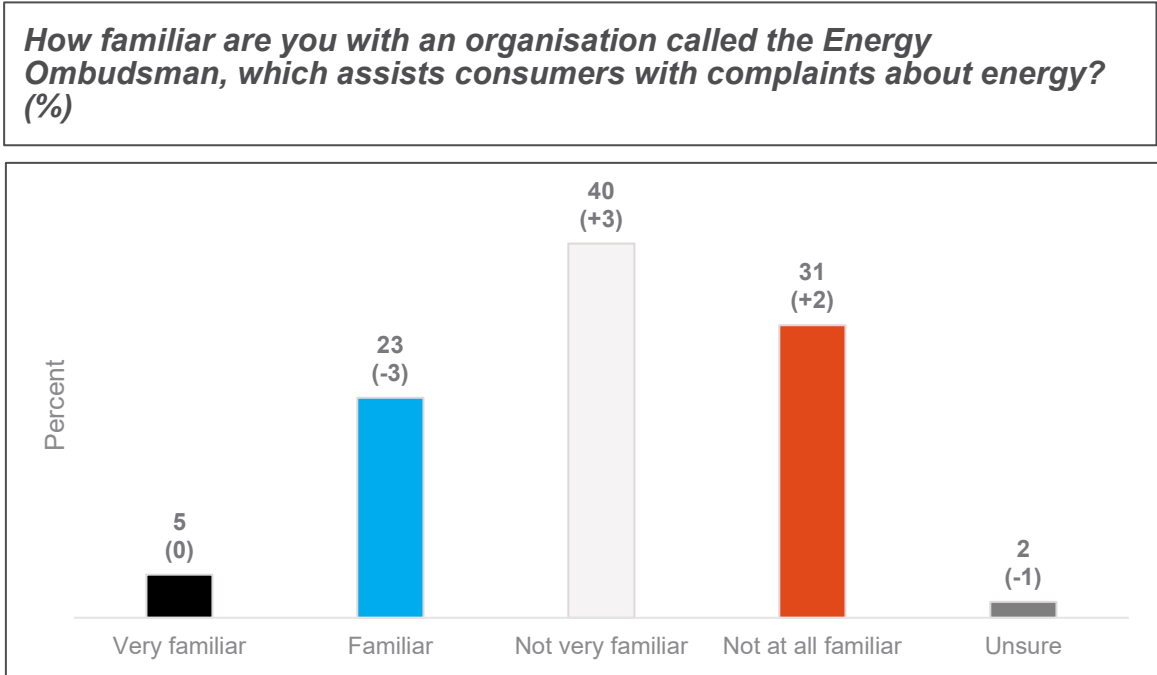
Base: Consumers in NSW who have switched or looked at switching in the past (n=302)



Other

## Awareness of the Energy Ombudsman

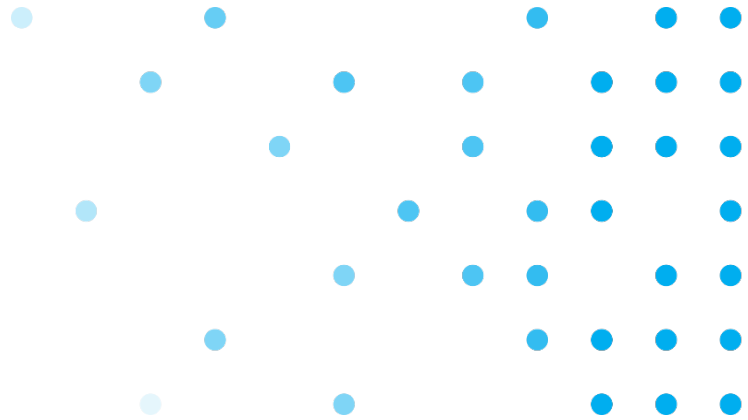
28% of NSW consumers said they are very familiar or familiar with the Energy Ombudsman.



Base: Consumers in NSW (n=417)



# Victoria





## Overall satisfaction

Satisfaction with the provision of electricity and gas services overall has increased.

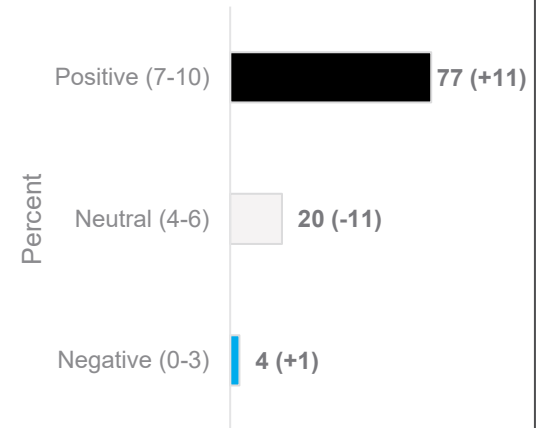
- 77% are satisfied with their electricity and gas services, up 11%.

Satisfaction with the level of competition has increased.

- 60% are positive about the level of competition in the energy market in their area, up 7%.

### Overall Satisfaction

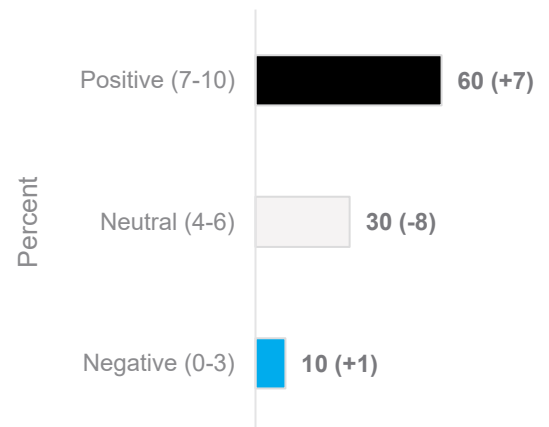
*How satisfied are you with the provision of your electricity and gas services overall in the last 6 months? (%)*



Base: Consumers in VIC (n=425)

### Satisfaction with competition

*How satisfied are you with the level of competition in the energy market in your area? (%)*



Base: Consumers in VIC (n=425)

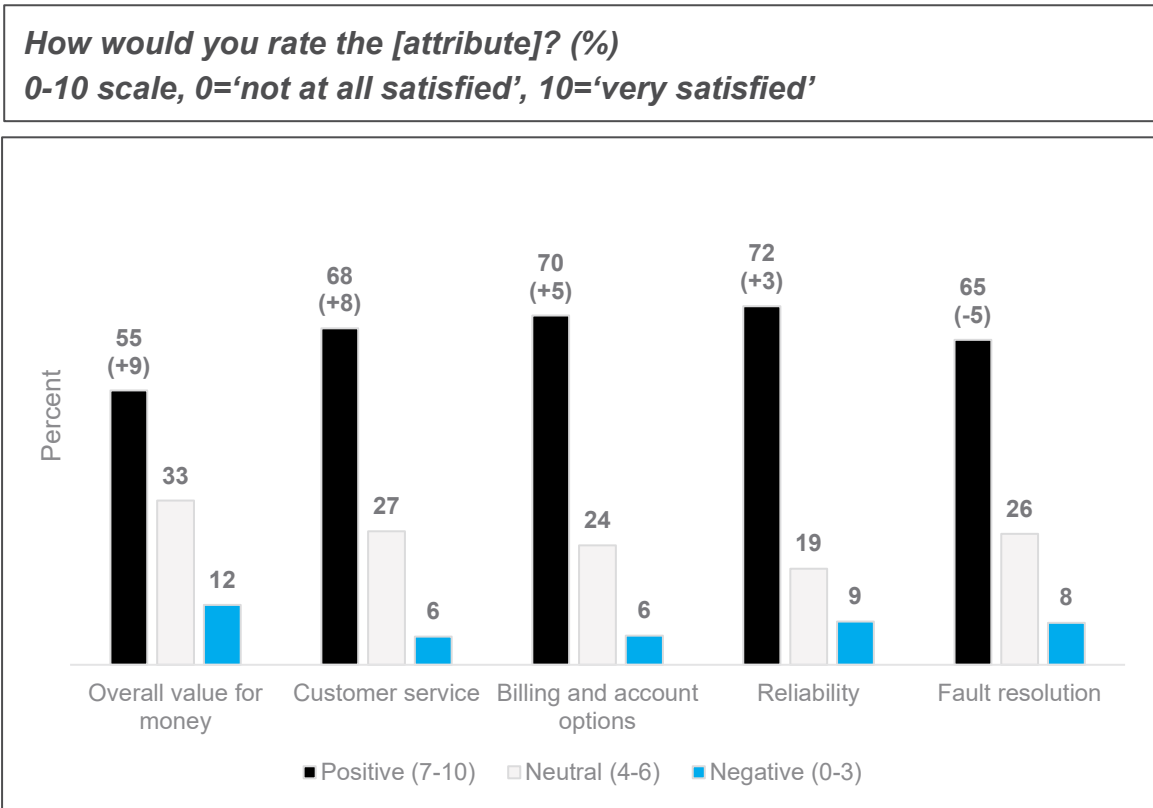


# Satisfaction

## Satisfaction with electricity

Satisfaction has increased across all measures, except fault resolution.

- 55% are satisfied with the overall value for money of their electricity, up 9%.
- 72% are satisfied with reliability, up to 72%.
- 70% are satisfied with their billing and account options, up 5%.
- 68% are satisfied with their customer service, up 8%.
- 65% are satisfied with their fault resolution, down 5%.



Base: Consumers in VIC with electricity supply (n=425)  
Base for fault resolution: Those in VIC who rated 0 to 9 satisfaction and had a power outage (n=213)

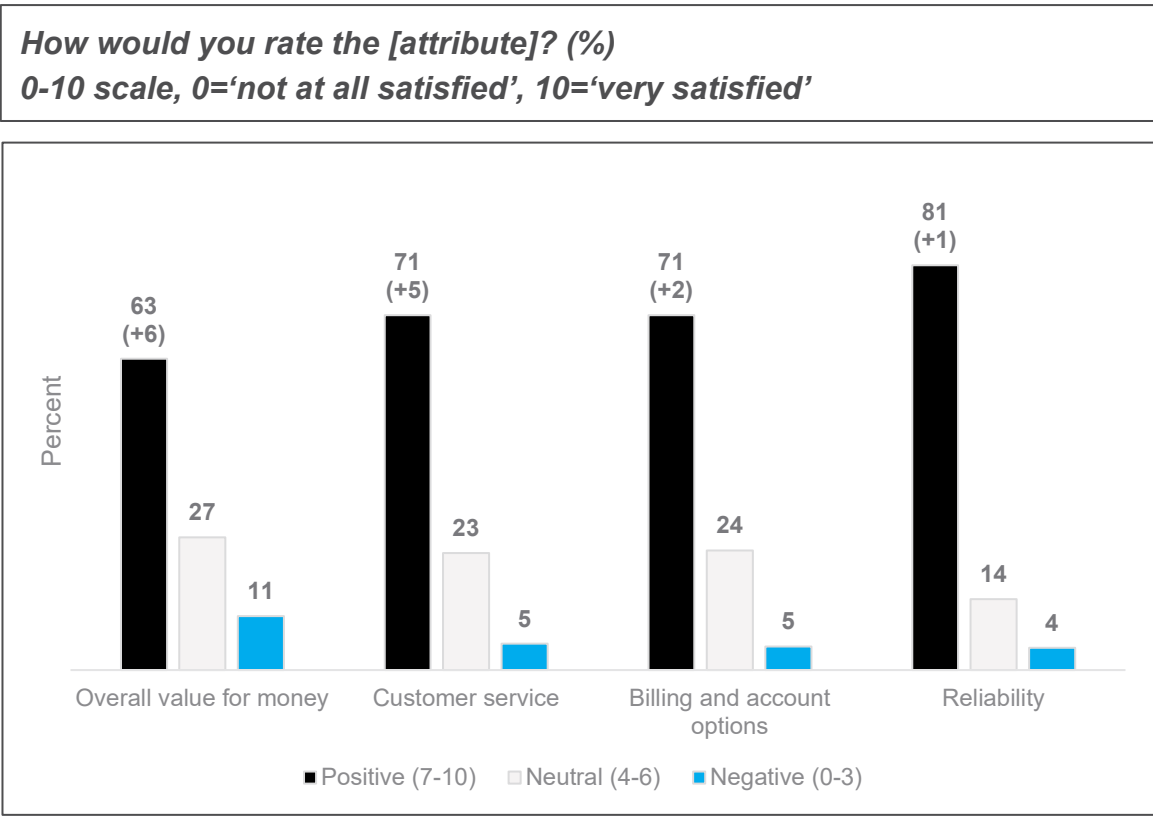


Satisfaction

## Satisfaction with gas

Satisfaction with gas services is up across all measures.

- 63% are satisfied with the value for money of their gas service, up 6%.
- 71% are satisfied with their gas provider’s customer service, up 5%.
- 71% of Victorian gas consumers are satisfied with the available billing and account options.
- 81% are satisfied with the reliability of their gas service, which remains the measure with the highest level of satisfaction.



Base: Consumers in VIC with gas supply (n=351)



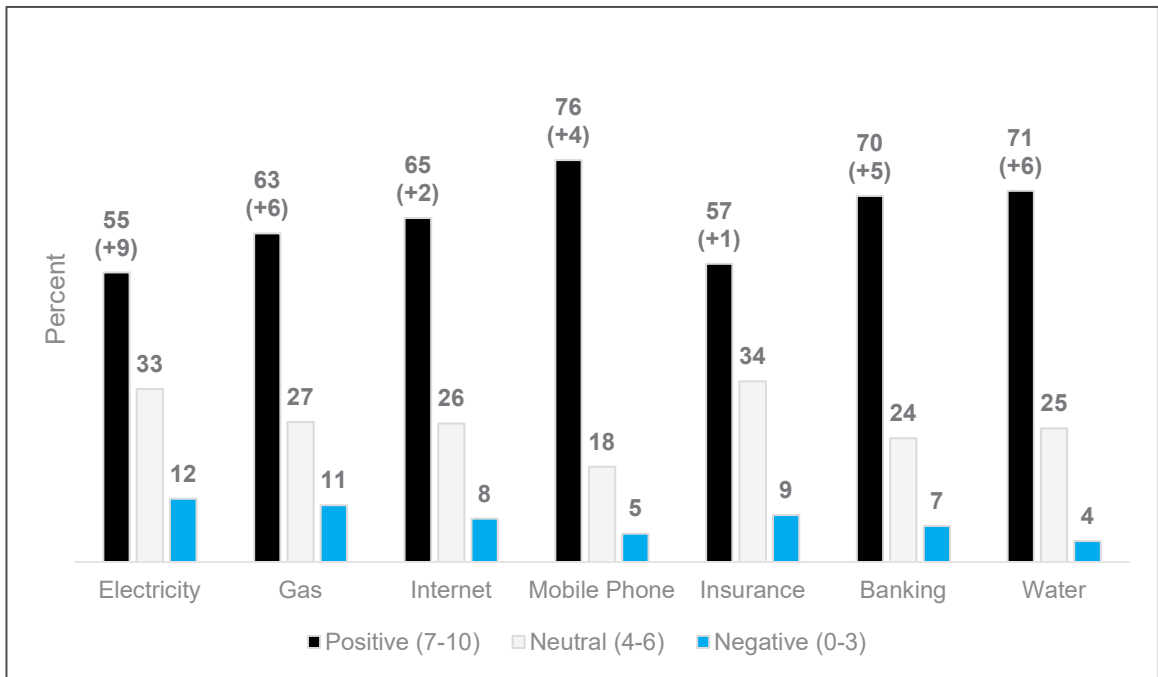
Satisfaction

## Satisfaction with utilities and services

Victorian household consumers were more satisfied with their electricity services than previously, but still rate it behind all other utilities and services.

- Households' satisfaction with their electricity service has increased 9% to 55%, but this is still behind the next lowest utility – insurance (57%).
- Satisfaction with gas services has increased 6% to 63%.

*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? (%)*  
*0-10 scale, 0='very poor', 10='excellent'*



Base: Consumers in VIC (n=425)

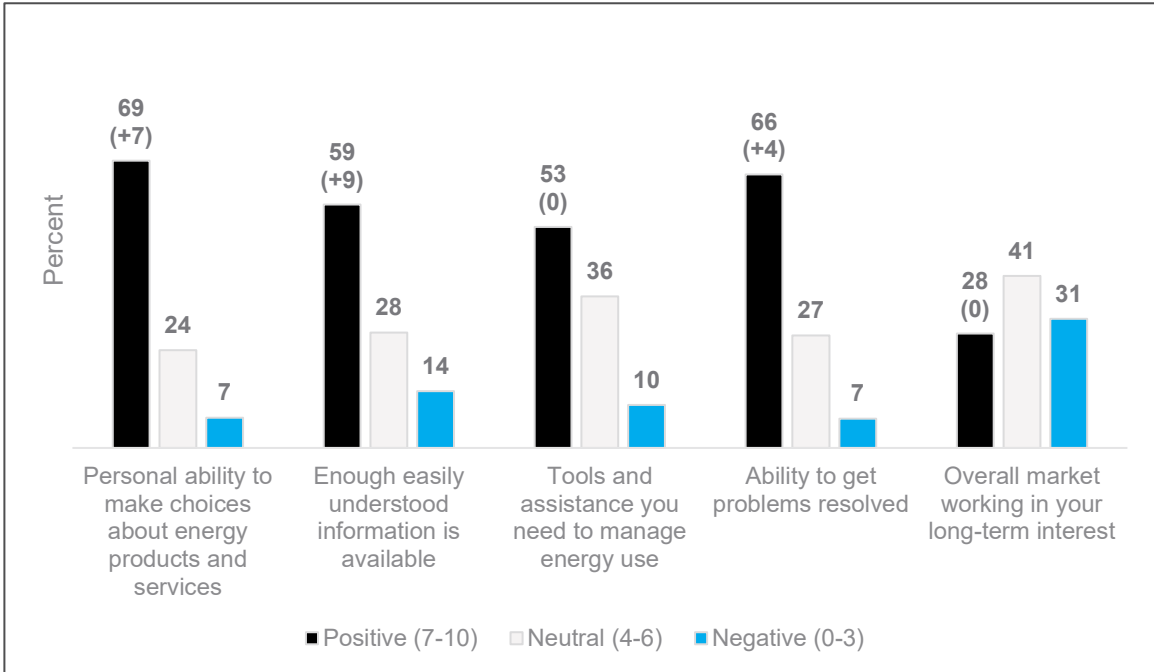


## Confidence in information, tools and a working market

Consumer confidence in the information and tools available to support their decision making is up or stable across all measures, but confidence in the market is unchanged at a low level.

- 69% are confident in their own ability to make choices about energy products and services (up 7%).
- 66% are confident about their ability to get problems resolved (up 4%).
- 59% are confident there is enough easily understood information available to support their decision making about energy products and services (up 9%).
- 53% are confident in the tools and assistance they need to manage their energy use (unchanged).
- Only 28% are confident the overall market is working in their long-term interests (unchanged).

**How would you rate the following? (%)**  
**0-10 scale, 0='not at all confident', 10='very confident'**



Base: Consumers in VIC (n=425)



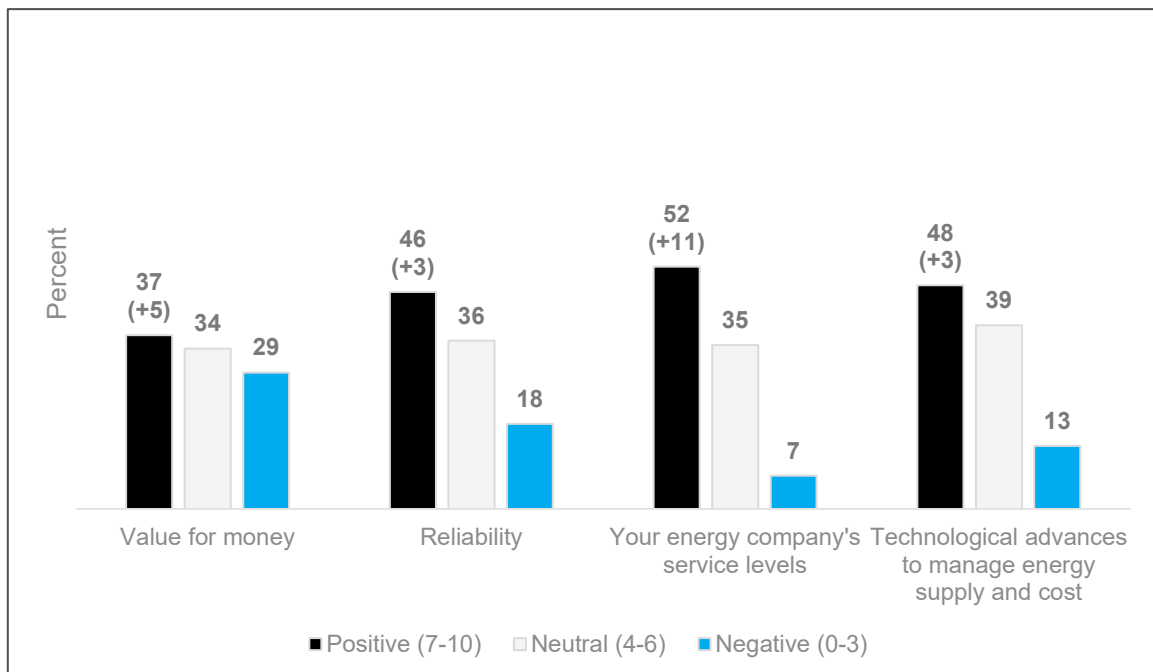
## Confidence in long term outcomes

**Consumer confidence in the energy market delivering better outcomes in the future has increased, but confidence in future value for money lags other measures.**

- Confidence in improved long-term value for money for energy services has increased by 5% (to 37%).
- Consumer confidence in technological advances to manage energy supply and cost is up to 48%.
- Confidence that customer service outcomes will improve in the future is at 52% (up 11%).
- Confidence that the reliability of energy supply will improve in the future has increased to 46%.

***Thinking about the overall market outcomes, how confident are you that the energy market will provide better outcomes for you in 5 years, in terms of...? (%)***

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



Base: Consumers in VIC (n=425)

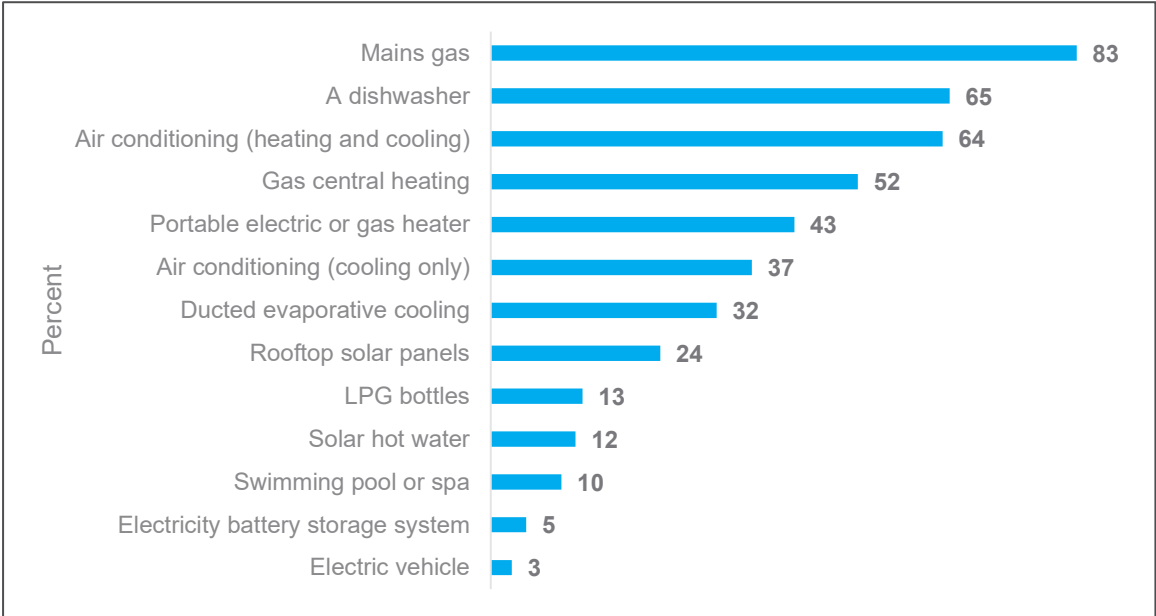


## Uptake of technologies

Victorian households have the highest uptake of digital/smart meters, but most who have one don't currently use the device to manage their energy costs.

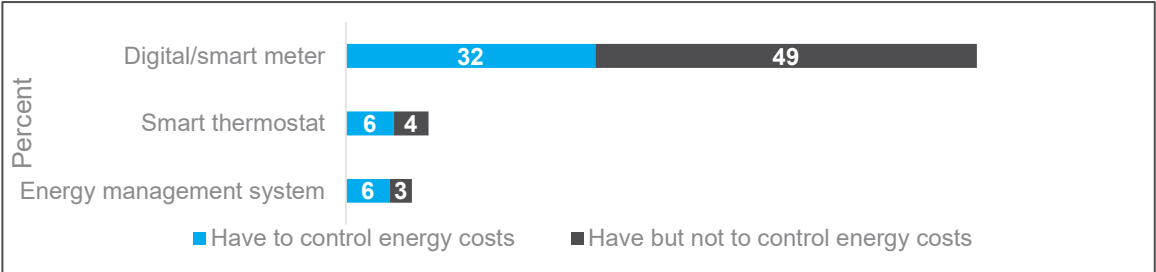
- 52% say that they have gas central heating, and 64% say they have air conditioning for both heating and cooling.
- 43% say they have a portable electric or gas heater.

**Which of the following do you have at your home? (%)**



Base: Consumers in VIC (n=425)

**Which of the following technology do you have at your home? And which do you use to help control your energy costs? (%)**



Base: Consumers in VIC (n=425)





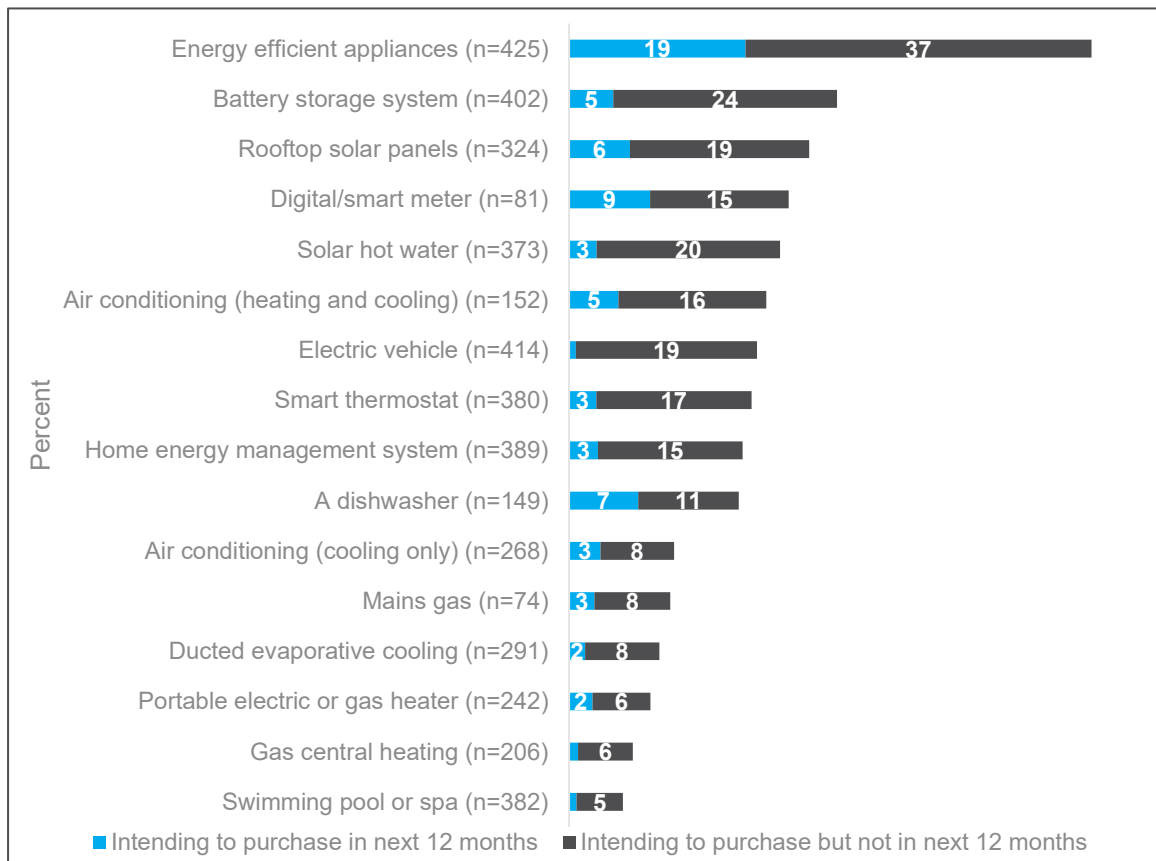
Activity

## Future uptake of technologies

**Victorian households are interested in purchasing new technologies, but generally not in the short term.**

- Of those households who report having solar panels, 48% have expressed interest in adding battery storage systems.
- Of those who do not currently have solar panels, 25% say they are considering installing them, including 6% who say they intend to do so in the next 12 months.
- 29% are considering a battery storage system and 5% intend to purchase a system in the next 12 months.

**Which of the following are you intending to purchase for your home? (%)**



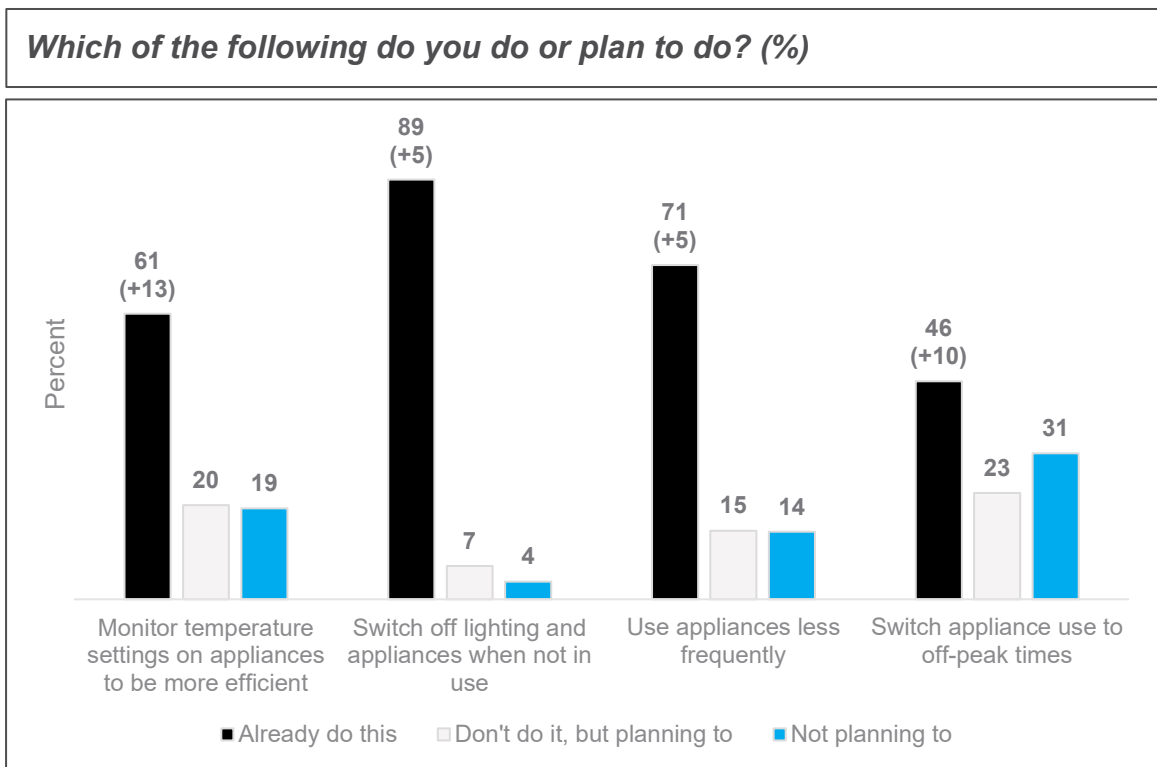
Note: Other than 'energy efficient appliances' which was asked of the entire sample, figures are the percentage of those who do not already have that technology in their home in Victoria



## Energy saving practices

The proportion of Victorian household consumers who say they are already undertaking energy saving practices has increased, and fewer now say they don't plan to undertake energy saving practices.

- 89% say they switch off lighting and appliances when not in use (up 5%).
- 71% say they are using appliances less frequently (up 5%).
- 61% say they are monitoring temperature settings on appliances to be more efficient.
- Almost half (46%) say they are already switching appliance use to off-peak times (up 10%).



Base: Consumers in VIC (n=425)

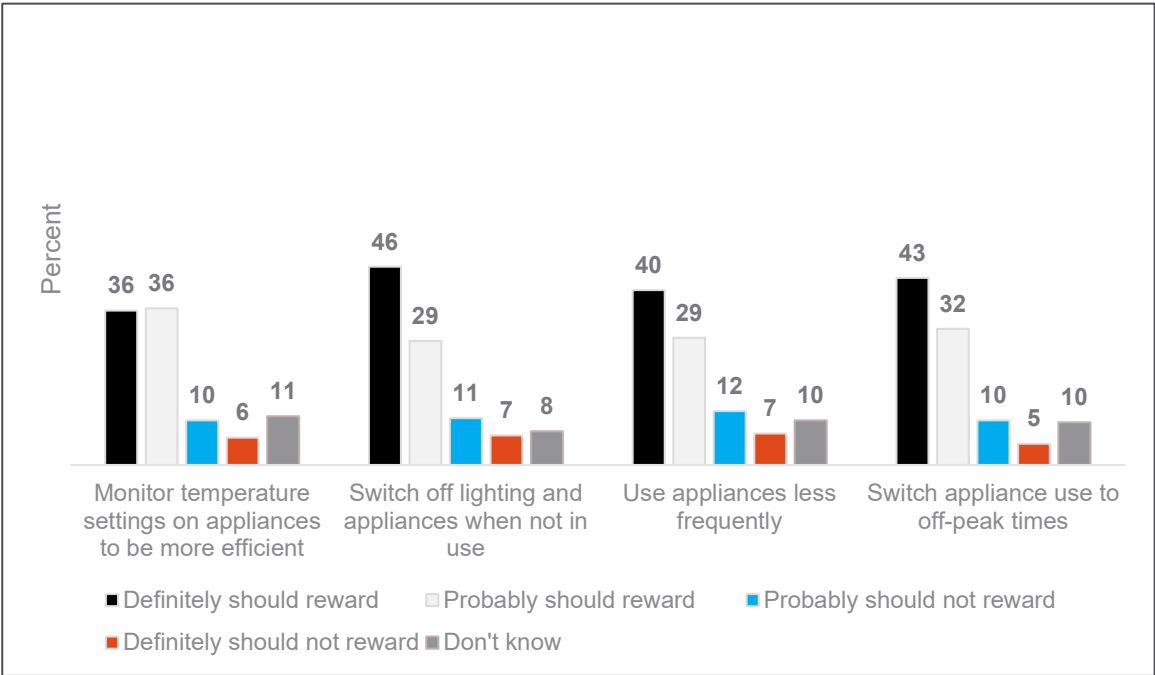


## Reward for reducing energy use

All identified means by which customers could be rewarded for taking action to reduce their energy usage were supported by a large majority of Victorian household consumers.

- 75% think electricity companies should do more to financially reward customers who switch appliance use to off-peak times (up 11%).
- 75% think electricity companies should do more to financially reward customers who switch off lighting and appliances when not in use (up 11%).
- 72% think electricity companies should do more to financially reward customers who monitor temperature setting on appliances to be more efficient (up 14%).
- 69% think electricity companies should do more to financially reward customers who use appliances less frequently (up 8%).

***Should electricity companies do more to financially reward customers who do the following: (%)***



Base: Consumers in VIC (n=425)

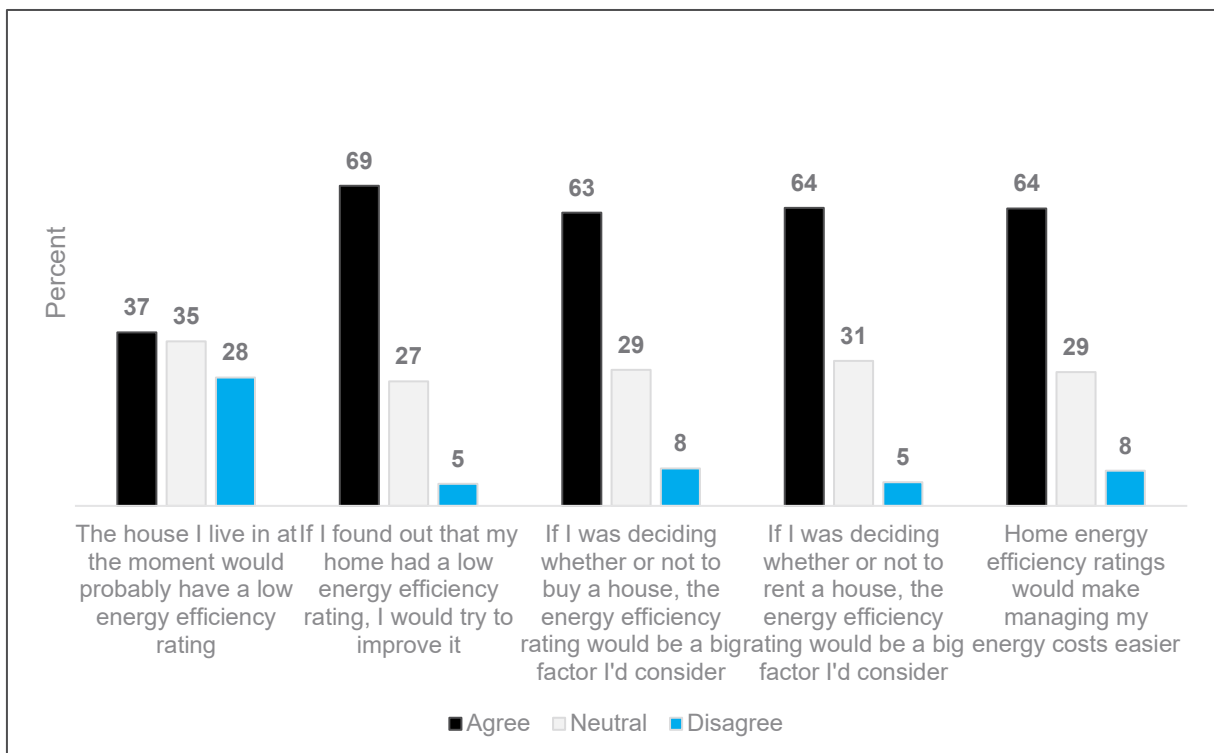


## Housing energy efficiency

**Most Victorian consumers are interested in the energy efficiency of their home, but they do not generally believe their home is energy efficient.**

- 69% said they would try to improve their home’s energy rating if they found out it had a low rating (up 1%).
- 64% said that a home energy efficiency rating would make managing their energy costs easier (up 7%).
- 64% of renters said that an energy rating would be a big factor they would consider when renting a house (up 12%).
- 63% said that an energy rating would be a big factor they would consider when buying a house (up 4%).
- Only 28% disagreed with the statement that the house they live in at the moment would probably have a low energy efficiency rating.

**Do you agree or disagree with the following? (%)**



Base for 'current house having a low energy rating', 'consider energy rating when purchasing a home' and 'home energy ratings would make managing my energy costs easier': Consumers in VIC (n=425)

Base for 'I would try to improve my home energy efficiency': Home-owners in VIC (n=296)

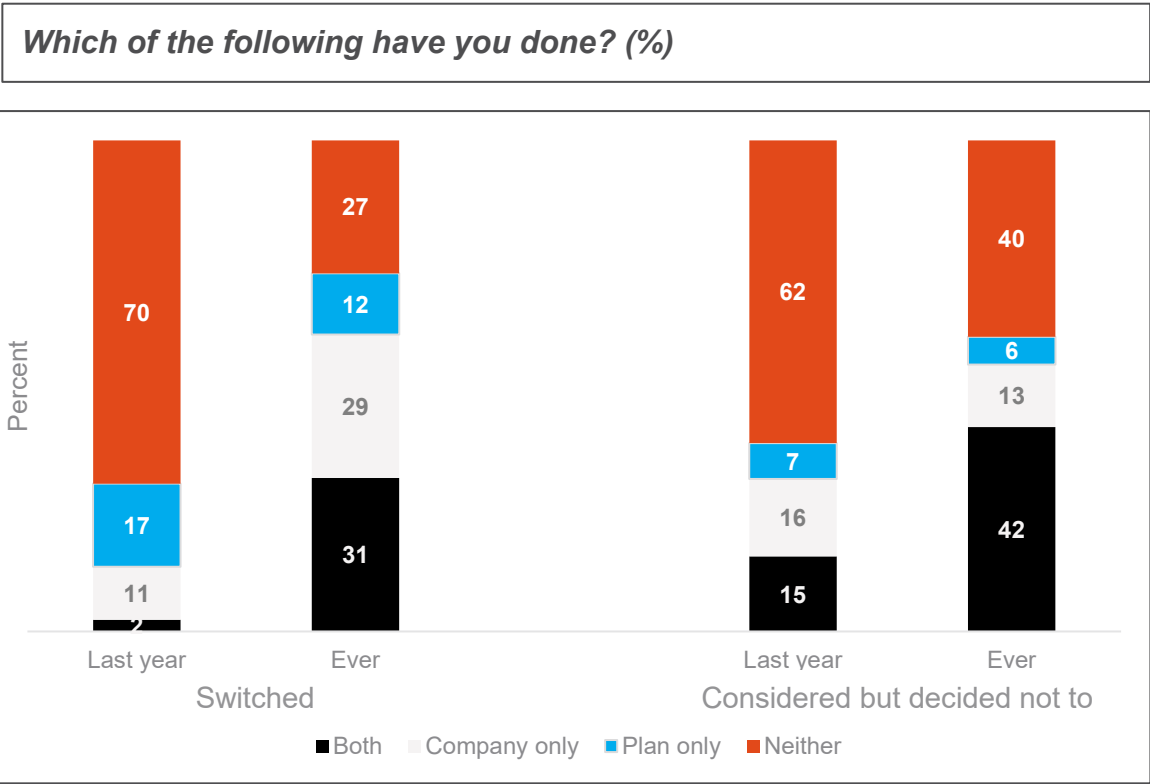
Base for 'consider energy rating when renting': Renters in VIC (n=119)



## Switching behaviour

**Around a third of Victorian household consumers report having switched companies or plans in the last year.**

- 30% of Victorian household consumers report having switched energy companies or plans in the last year, and 38% say they considered switching in the last year but did not do so.
- 27% say they have never switched companies or plans.



Base: Consumers in VIC (n=425)



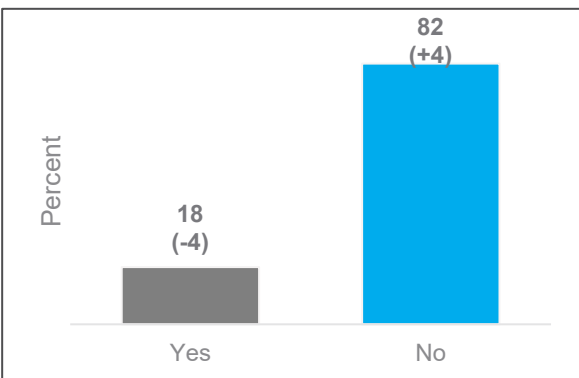
Activity

## Reasons for considering switching

Many are dissatisfied with their retailer’s value for money or searched for a better plan on a comparison website.

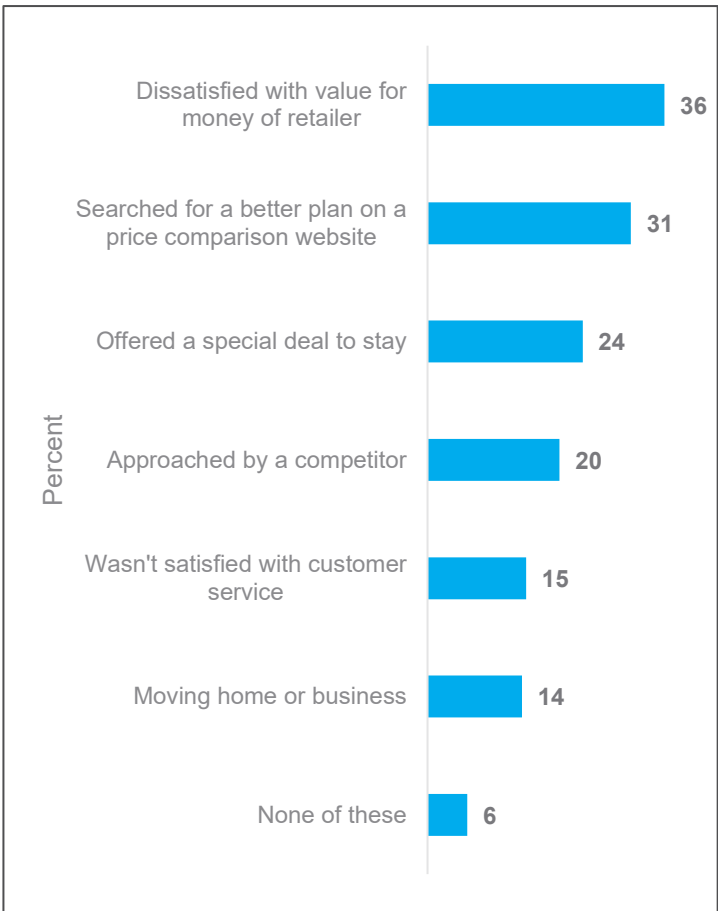
- 36% of those who have looked at switching energy companies or plans said that they were dissatisfied with value for money of their retailer.
- Of those who had looked at switching energy companies, 31% said they searched for a better plan on a comparison website.
- 18% of all Victorian household consumers say they intend to switch in the next year.

**Do you intend to switch energy companies or energy plans in the next year? (%)**



Base: Consumers in VIC (n=425)

**Thinking of the last time you were looking at switching energy companies, which of the following apply to you? (%)**



Base: Consumers in VIC who have switched or looked at switching in the past (n=311)

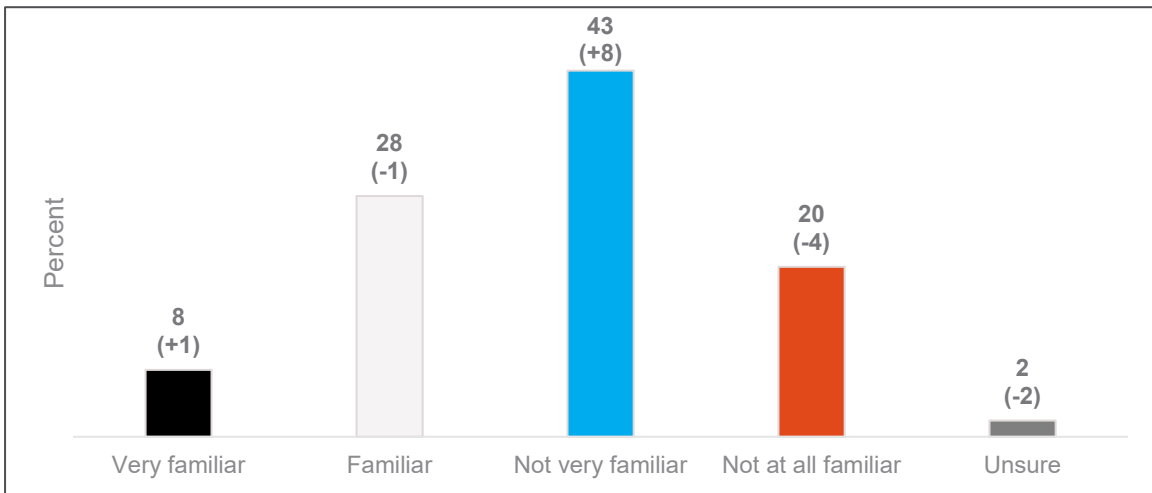


Other

## Awareness of the Energy Ombudsman

36% say they are very familiar or familiar with the Energy Ombudsman in Victoria.

**How familiar are you with an organisation called the Energy Ombudsman, which assists consumers with complaints about energy? (%)**



Base: Consumers in VIC (n=425)

# Queensland







## Satisfaction

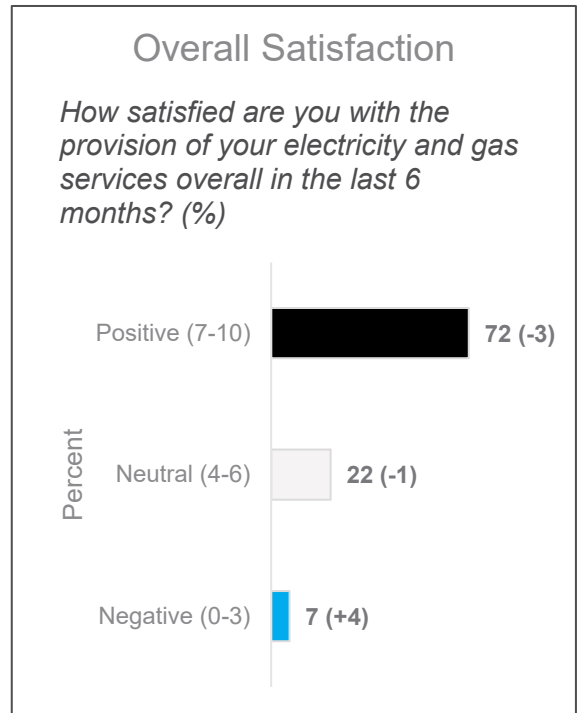
### Overall satisfaction

The proportion of Queensland household consumers satisfied with the provision of electricity and gas services overall has decreased.

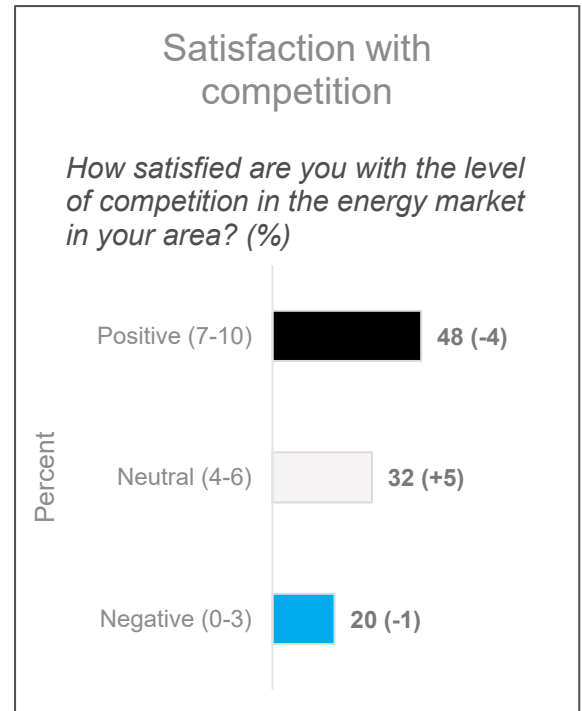
- 72% are satisfied, down 3% since last year's survey.

**Satisfaction with levels of competition has decreased.**

- 48% now say they are satisfied with the level of competition in their area, a decrease of 4%.



Base: Consumers in QLD (n=315)



Base: Consumers in QLD (n=315)



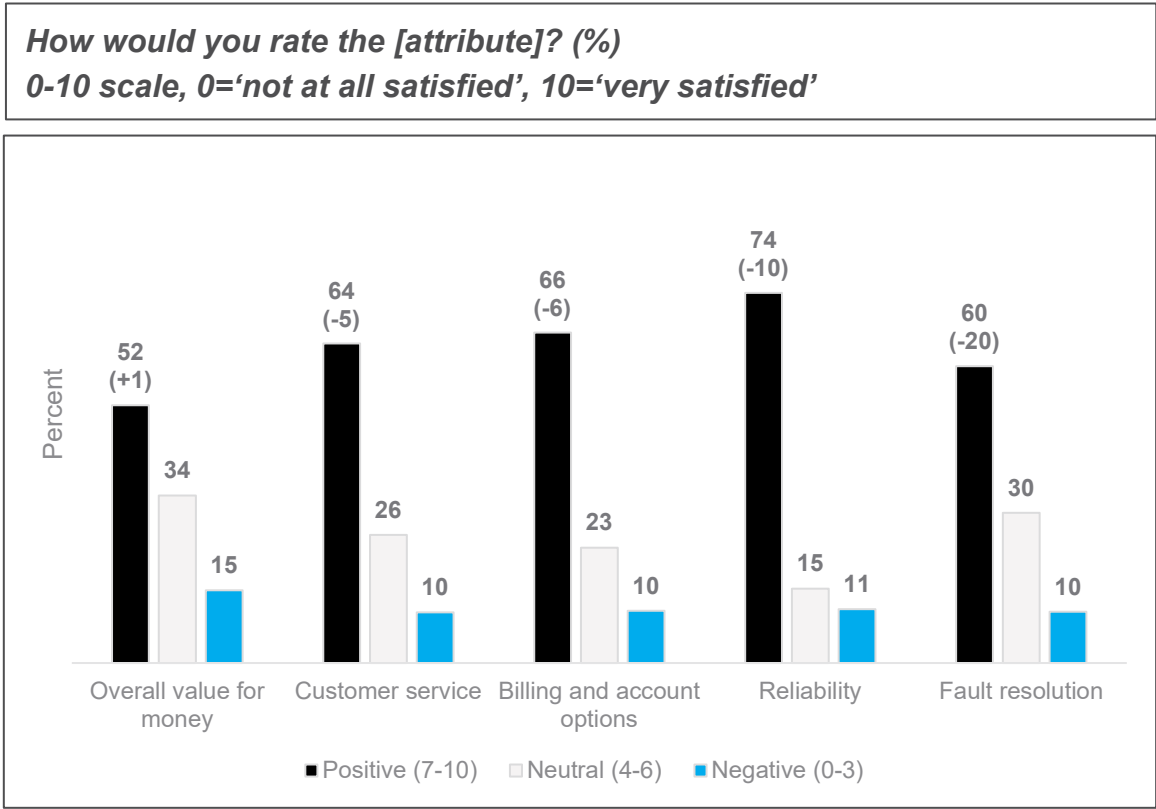
Satisfaction

### Satisfaction with electricity

Satisfaction with electricity services has decreased across most measures for Queensland household consumers, while satisfaction with the overall value for money of electricity services is steady at 52% (up 1%).

The following measures had double-digit decreases:

- Reliability (down 10% to 74%).
- Fault resolution (down 20% to 60%).



Base: Consumers in QLD with electricity supply (n=315)  
Base for fault resolution: Those in QLD who rated 0 to 9 satisfaction and had a power outage (n=146)



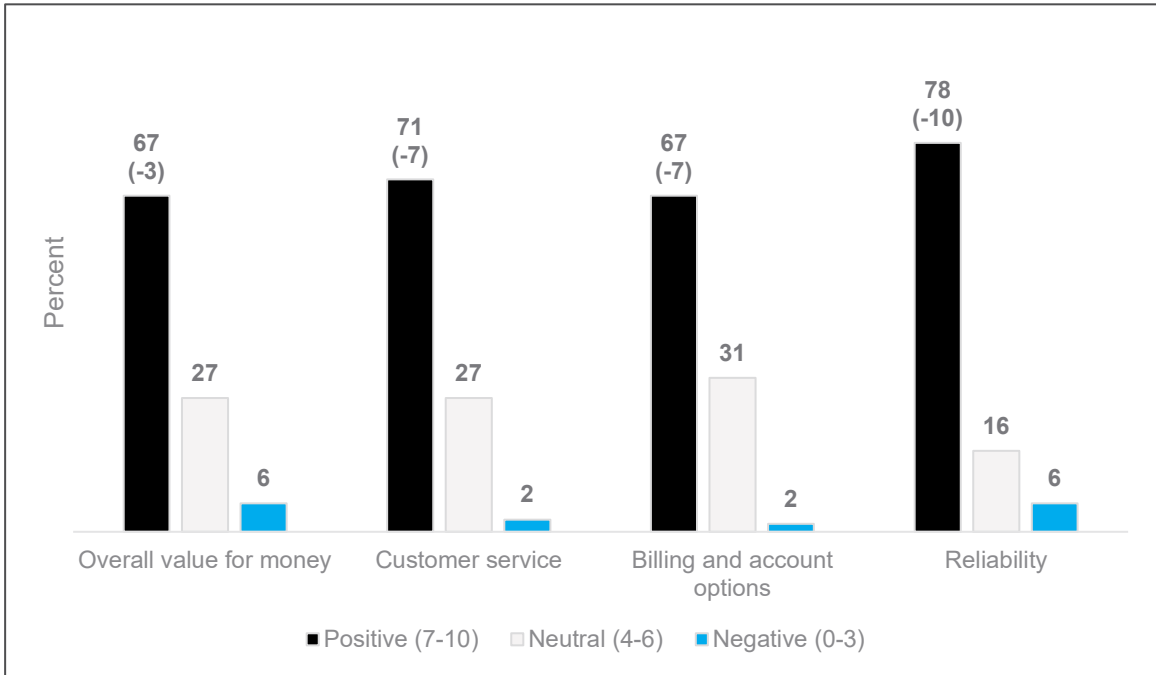
Satisfaction

Satisfaction with gas

Satisfaction with gas services has decreased across all measures for Queensland household consumers.

- 78% say they are satisfied with the reliability of their gas service (down 10%).
- 71% say they are satisfied with the customer service provided by their gas supplier (down 7%).
- 67% now say they are satisfied with their billing and account options (down 7%).
- 67% say they are satisfied with the overall value for money of their gas service (down 3%).

*How would you rate the [attribute]? (%)*  
*0-10 scale, 0='not at all satisfied', 10='very satisfied'*



Base: Consumers in QLD with gas supply (n=54)

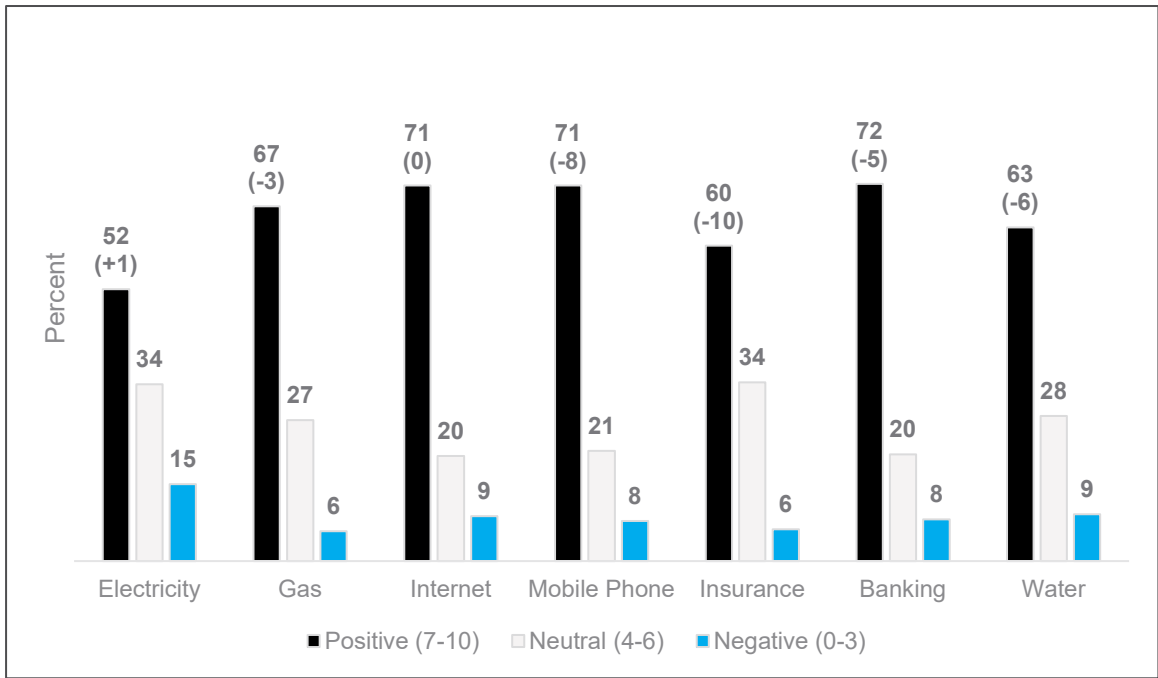


## Satisfaction with utilities and services

Satisfaction with value for money of electricity services didn't decrease like satisfaction with other services, but Queensland household consumers are still least satisfied with electricity services.

- Satisfaction with the value for money of electricity services increased 1% to 52%, and the next lowest rating was insurance at 60% (down 10%).
- Satisfaction with value for money of gas services decreased 3% to 67%.

***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? (%)***  
***0-10 scale, 0='very poor', 10='excellent'***



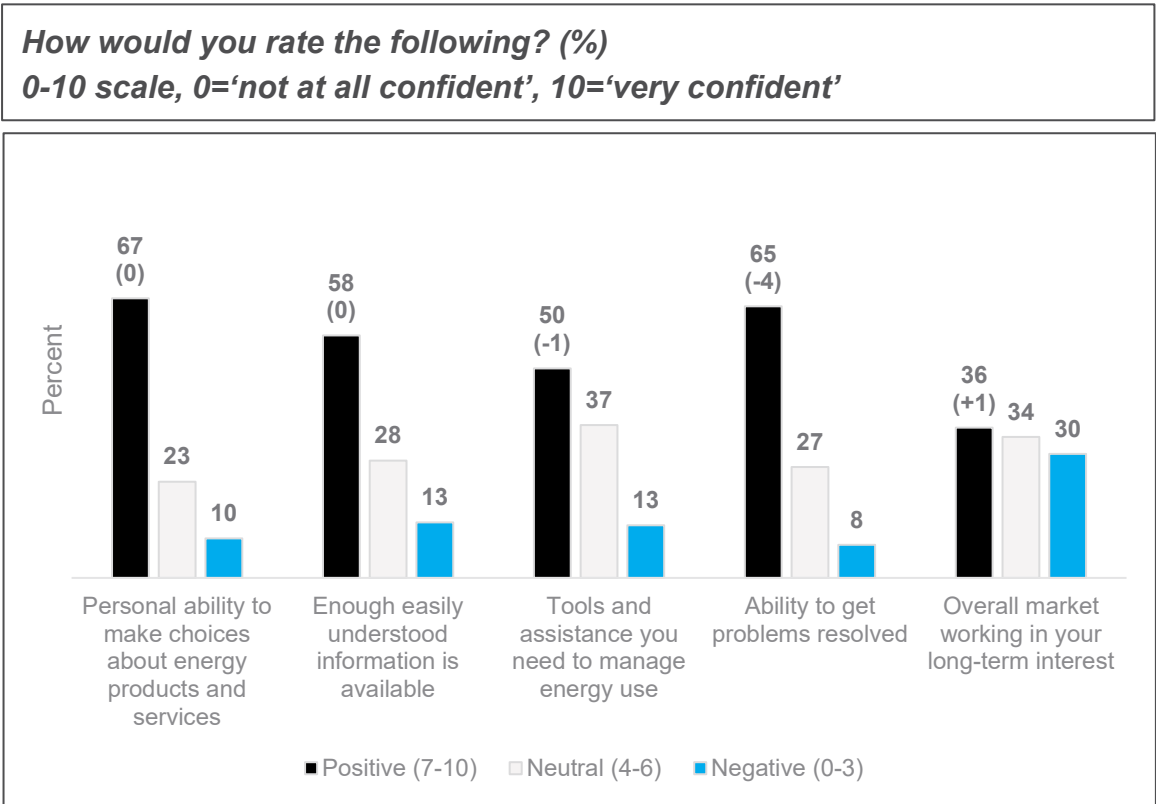
Base: Consumers in QLD (n=315)



## Confidence in information, tools and a working market

Confidence has not changed for most measures among Queensland household consumers.

- Respondents' confidence in their personal ability to make choices (67%) and easily understood information (58%) were unchanged since last year.
- Consumer confidence in their ability to get problems resolved decreased by 4% to 65%.



Base: Consumers in QLD (n=315)



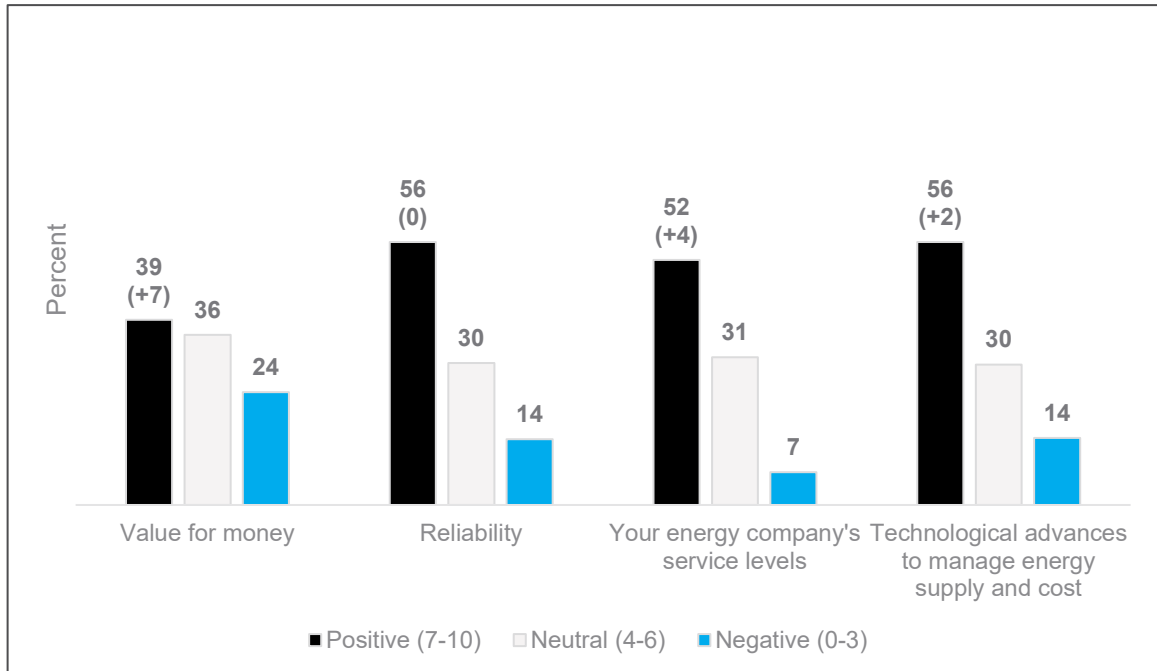
## Confidence in long term outcomes

Consumer confidence in future value for money has increased but it continues to lag other measures.

- The proportion confident of better value for money outcomes in the future is up 7% to 39%.
- The proportion of Queensland household consumers saying they are confident that there will be more reliable energy services in the future is unchanged at 56%.
- The proportion confident that future technological advances will improve their ability to manage their energy use and costs is steady at 56%.
- The proportion confident they will see better service levels in the future is up 4% to 52%.

**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'**



Base: Consumers in QLD (n=315)

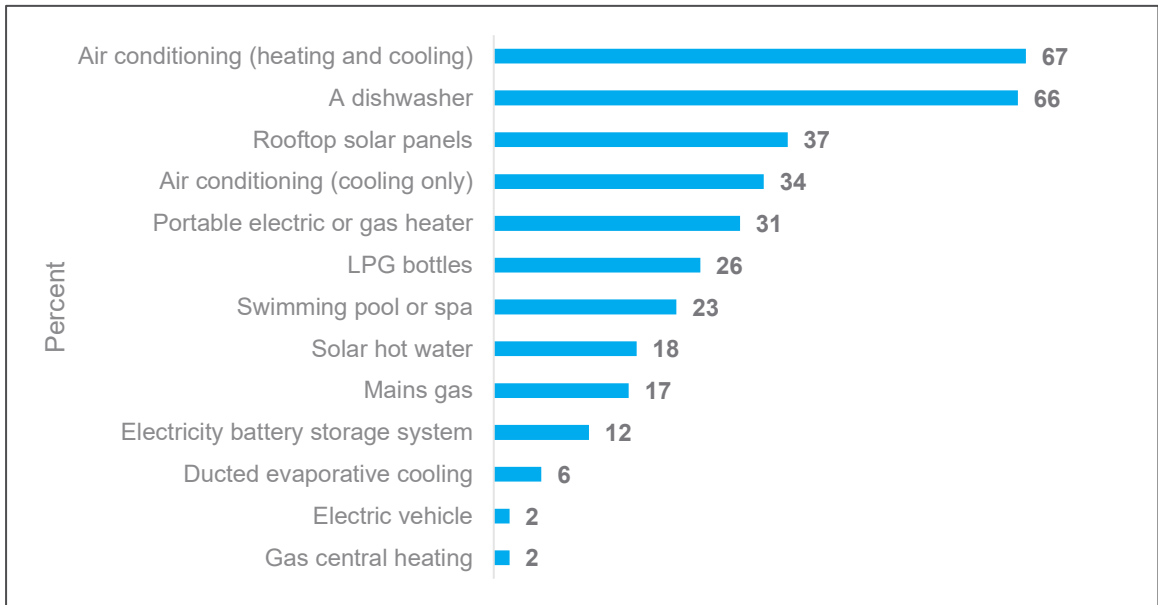


## Uptake of technologies

Queensland household consumers in this survey are among the most likely to have rooftop solar.

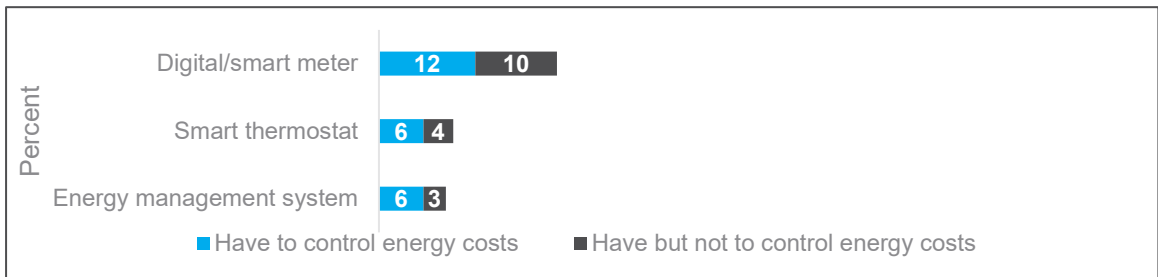
- More than one third of households in Queensland report having rooftop solar.
- 22% say they have a smart/digital meter and more than half of those (12%) say they use it to manage their energy use and costs.

**Which of the following do you have at your home? (%)**



Base: Consumers in QLD (n=315)

**Which of the following technology do you have at your home? And which do you use to help control your energy costs? (%)**



Base: Consumers in QLD (n=315)

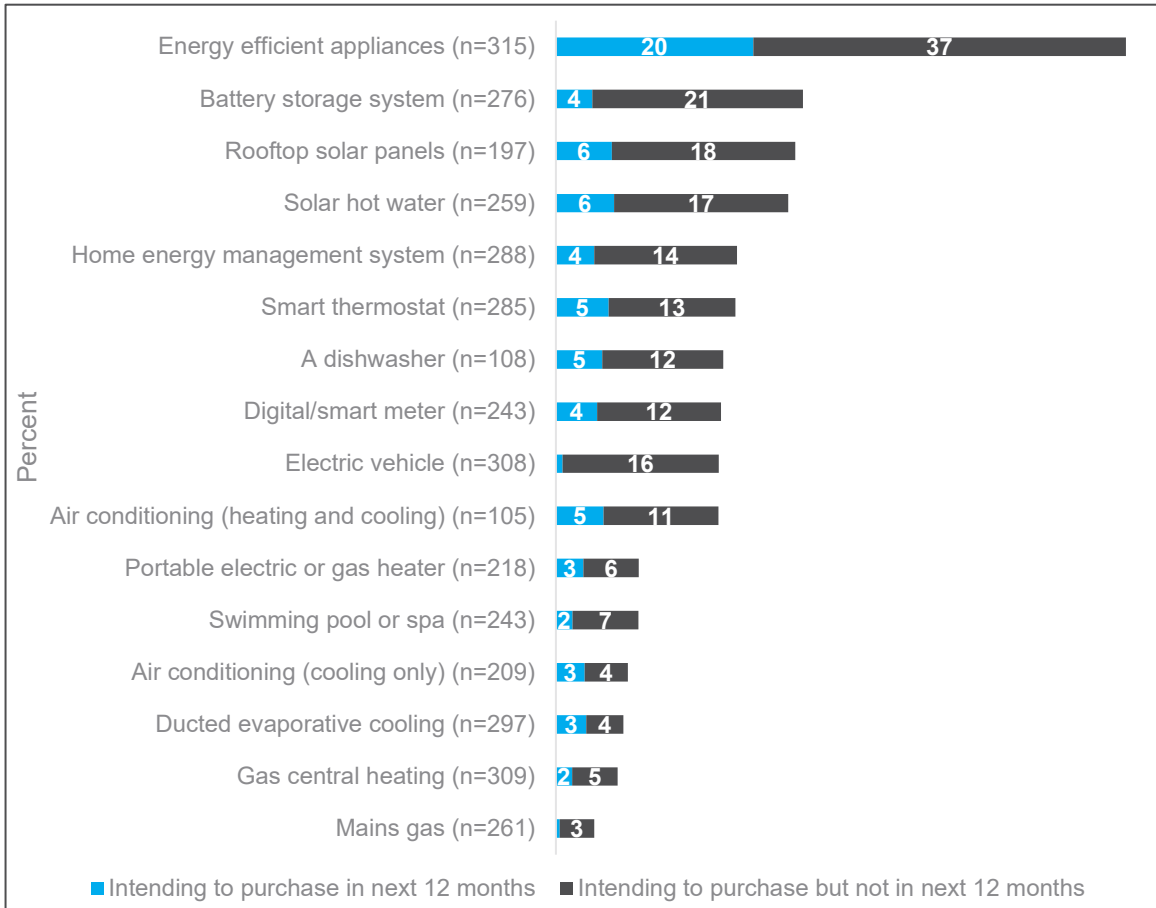


## Future uptake of technologies

There is significant interest among consumers in procuring technology to manage their energy use.

- Of those households who reported having solar panels, 47% expressed interest in purchasing a battery storage system.
- 57% say that they are considering purchasing energy efficient appliances, and 20% plan to do so in the next 12 months.

**Which of the following are you intending to purchase for your home? (%)**



Note: Other than 'energy efficient appliances' which was asked of the entire sample, figures are the percentage of those who do not already have that technology in their home in Queensland

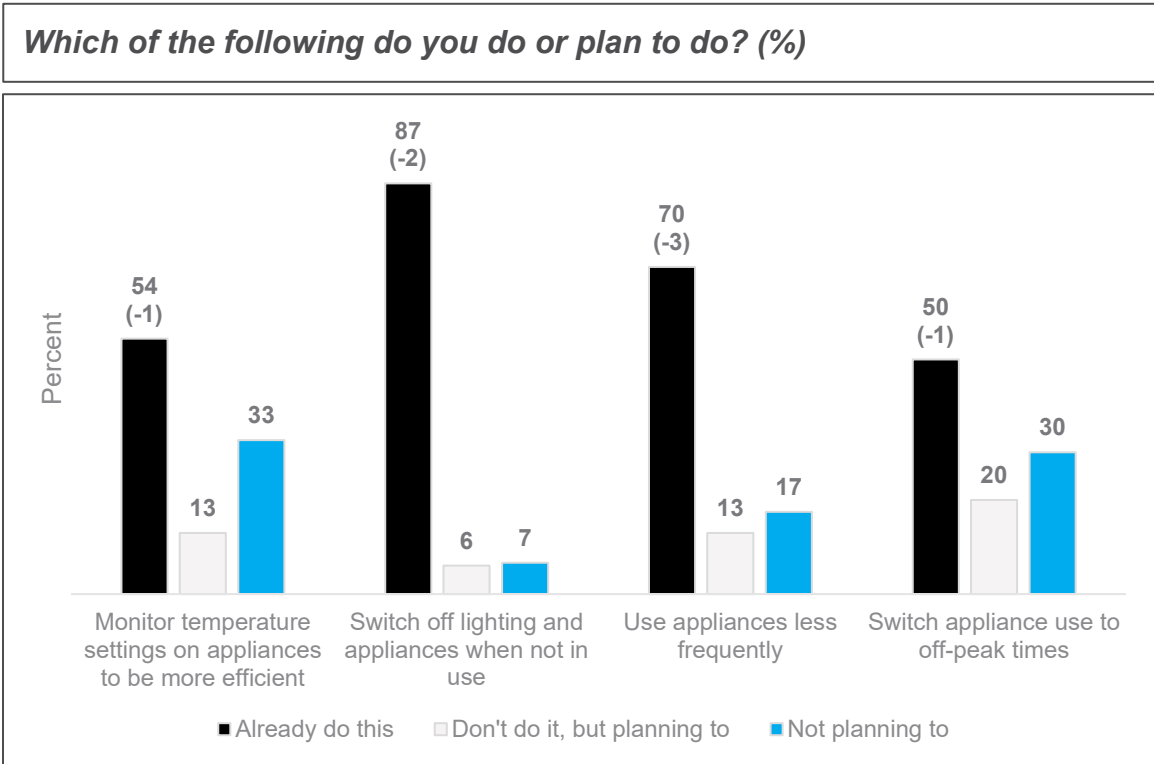




## Energy saving practices

At least half of the surveyed consumers in Queensland are already doing each of the listed energy savings practices.

- The most common actions to save energy are to switch off lights and appliances when not in use (87%) and using appliances less frequently (70%).
- Half of all consumers say they already switch their appliance use to off-peak times (50%).



Base: Consumers in QLD (n=315)

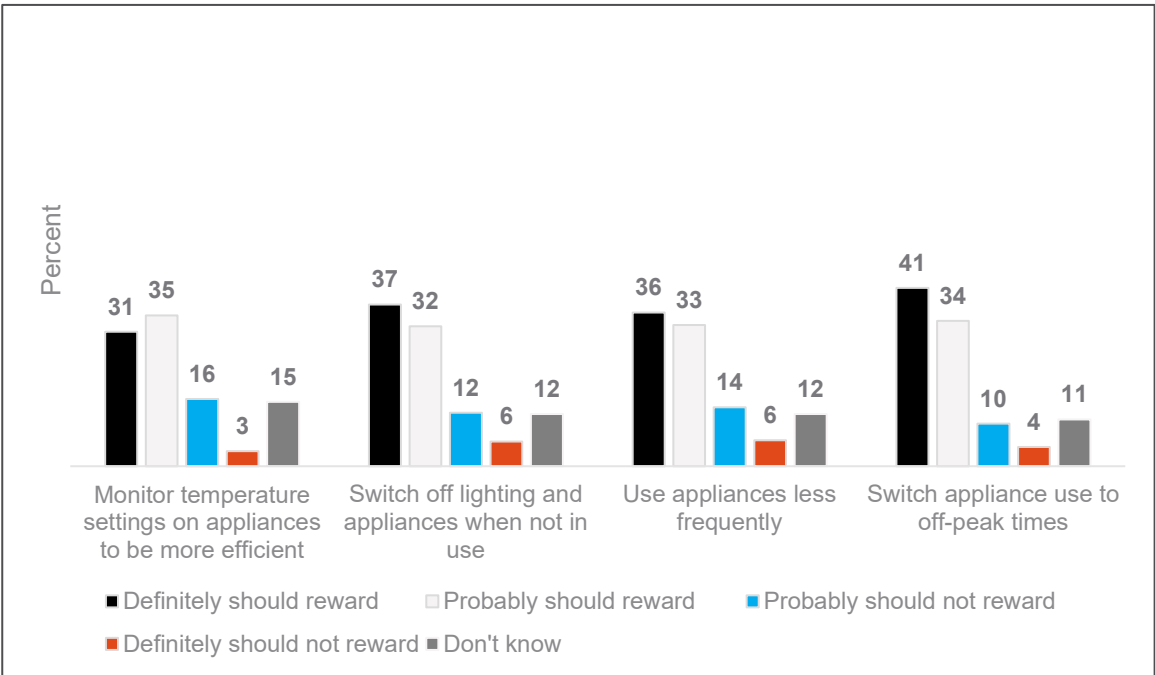


## Reward for reducing energy use

**Most Queensland household consumers think customers should be rewarded for taking action to reduce their energy usage.**

- 75% think electricity companies should do more to financially reward customers who switch appliance use to off-peak times (up 2%).
- 69% think electricity companies should do more to financially reward customers who switch off lighting and appliances when not in use (up 1%).
- 69% think electricity companies should do more to financially reward customers who use appliances less frequently (up 2%).
- 66% think electricity companies should do more to financially reward customers who monitor temperature settings on appliances to be more efficient (up 5%).

***Should electricity companies do more to financially reward customers who do the following: (%)***



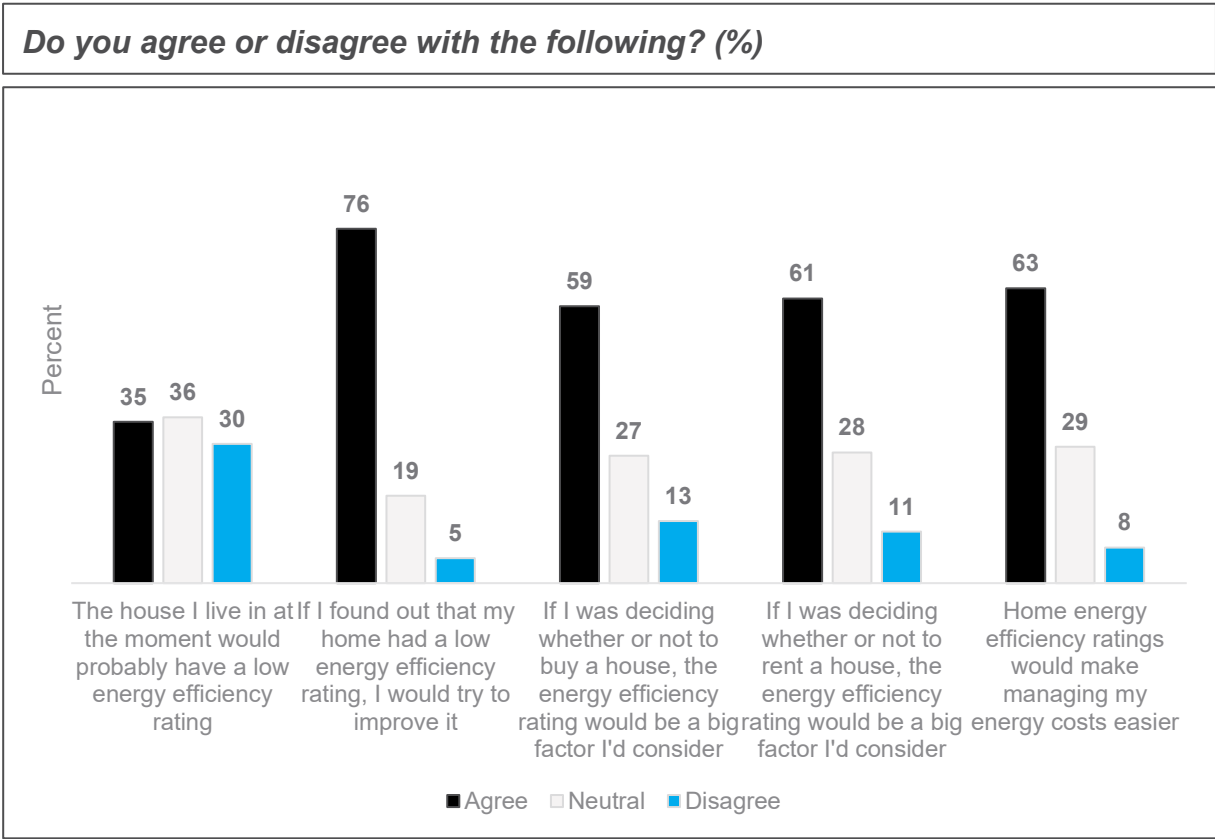
Base: Consumers in QLD (n=315)



## Housing energy efficiency

**Most Queensland consumers are interested in the energy efficiency of their homes, but they do not generally believe their home is energy efficient.**

- Only 30% disagreed with the statement that their home would probably have a low energy efficiency rating.
- 76% said they would try to improve their home's energy rating if they found out it had a low rating (unchanged).
- 63% said that a home energy efficiency rating would make managing their energy costs easier (up 8%).
- 61% of renters said that an energy efficiency rating would be a big factor they would consider, when renting a house (unchanged).
- 59% said that an energy efficiency rating would be a big factor they would consider, when buying a house (up 2%).



Base for 'current house having a low energy rating', 'consider energy rating when purchasing a home' and 'home energy ratings would make managing my energy costs easier': Consumers in QLD (n=315)

Base for 'I would try to improve my home energy efficiency': Home-owners in QLD (n=187)

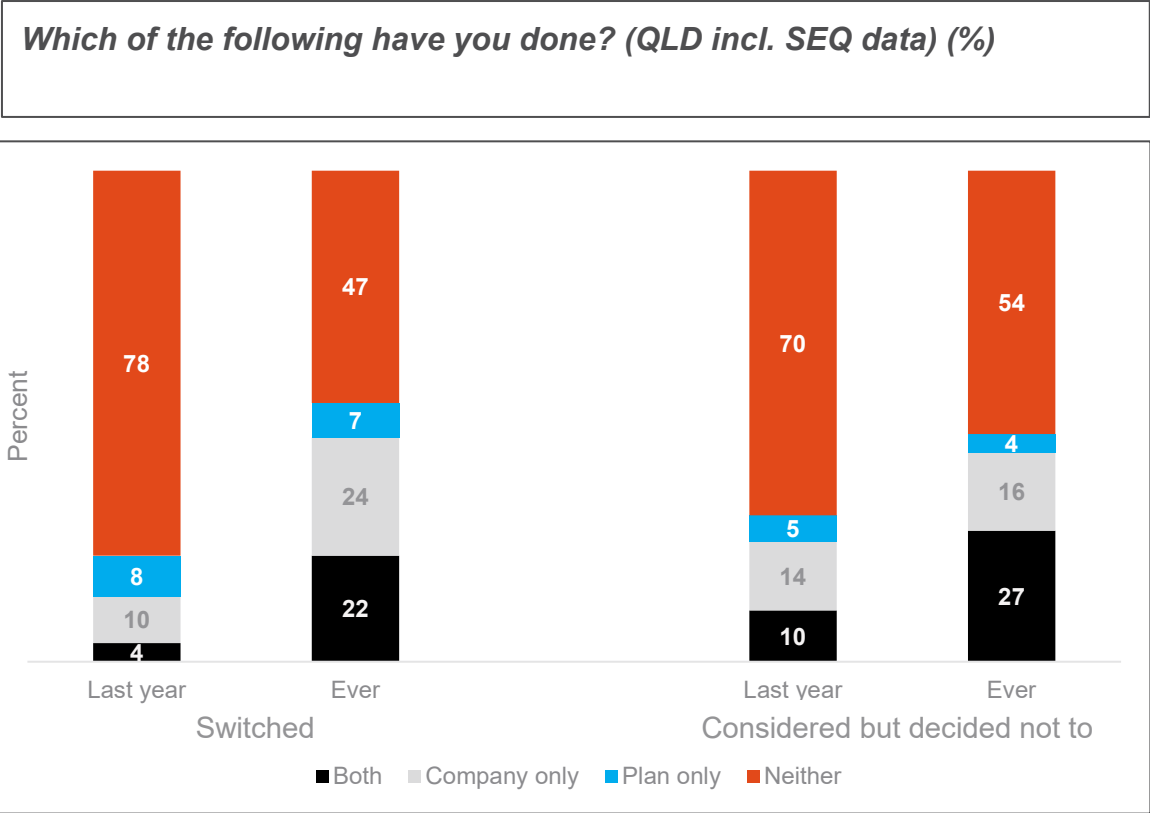
Base for 'consider energy rating when renting': Renters in QLD (n=118)



## Switching behaviour

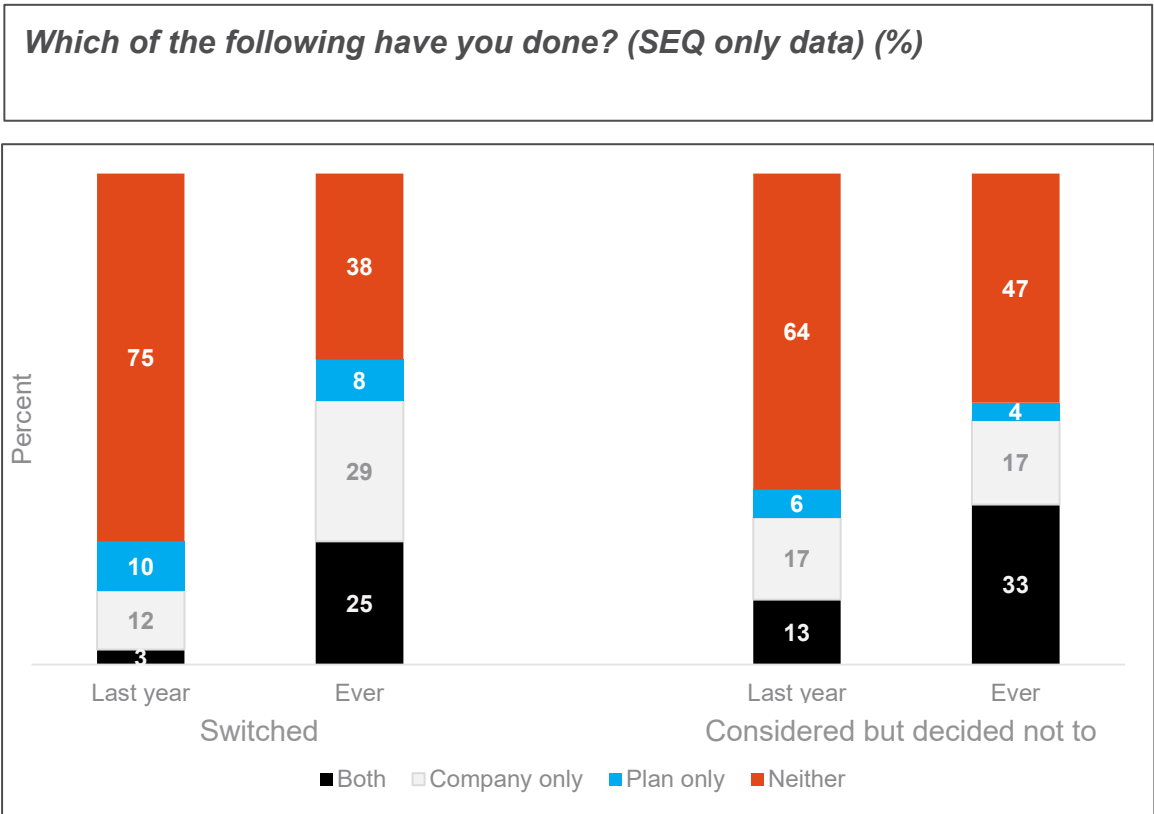
Although switching rates for Queensland as a whole are relatively low, declared switching behaviour in the deregulated part of the state (much of South East Queensland) is more in line with other states.

- 22% of all Queensland household consumers report having switched companies or plans in the past year, while 29% say they considered it but decided not to at that time.
- 47% report that they have never switched energy companies or plans.



Base: Consumers in QLD (n=315)

- In the deregulated part of the state, 25% report having switched in the past year and 38% say they have never switched.



Base: Consumers in SEQ (n=227)

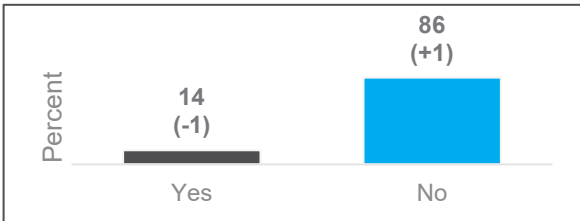


## Reasons for considering switching

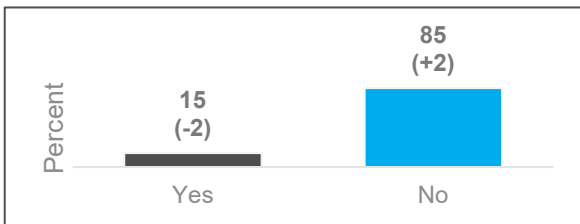
Searching a comparison website is a common practice for those that are considering switching.

- 29% of those who have considered switching searched for a better plan on a comparison website.
- 14% of all Queensland household consumers (and 15% of those in South East Queensland) say they intend to switch energy companies or plans in the next year.

**Do you intend to switch energy companies or energy plans in the next year? (%)**

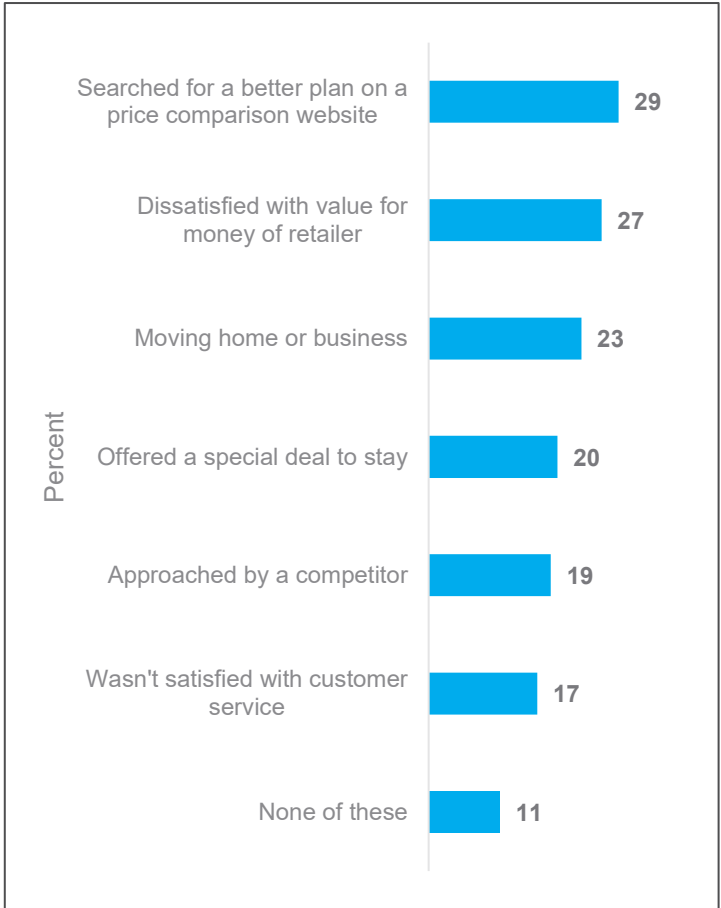


Base: Consumers in QLD (n=315)



Base: SE Consumers in QLD (n=227)

**Thinking of the last time you were looking at switching energy companies, which of the following apply to you? (%)**



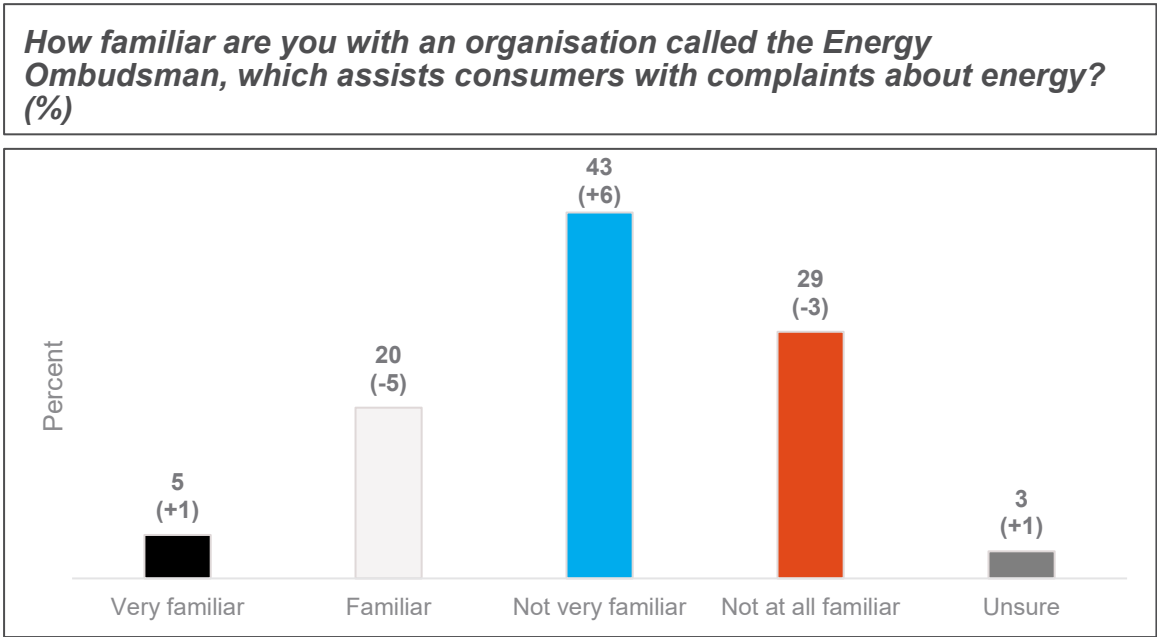
Base: Consumers in QLD who have switched or looked at switching in the past (n=172)



Other

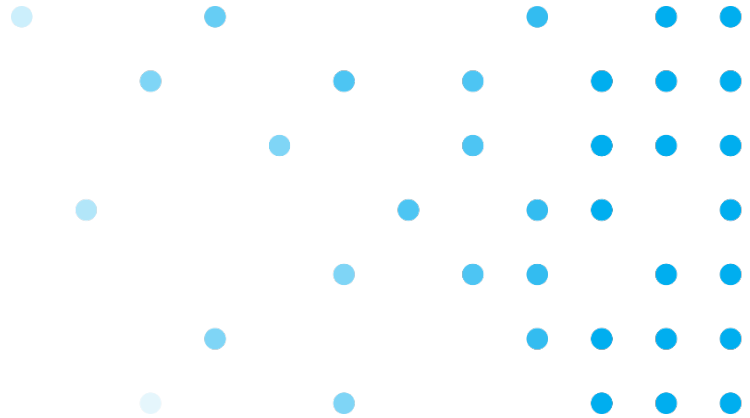
## Awareness of the Energy Ombudsman

25% say they are familiar with the Energy Ombudsman in Queensland (down 4%).



Base: Consumers in QLD (n=315)

# South Australia







## Overall satisfaction

**Overall satisfaction has increased among South Australian household consumers.**

- 74% say they are satisfied, up 8%.

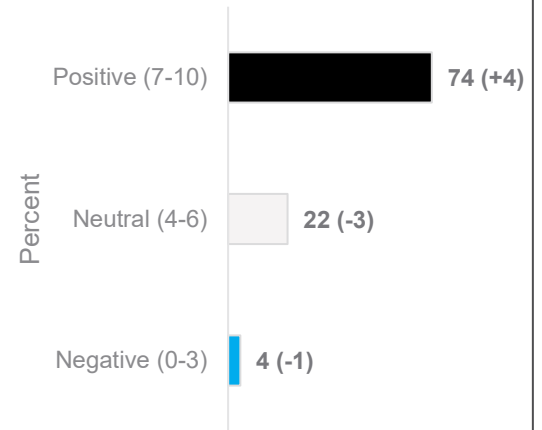
**There has also been an increase in satisfaction with levels of competition.**

- 58% of South Australian household consumers are satisfied with the competition in the energy market, up 5%.

## Satisfaction

### Overall Satisfaction

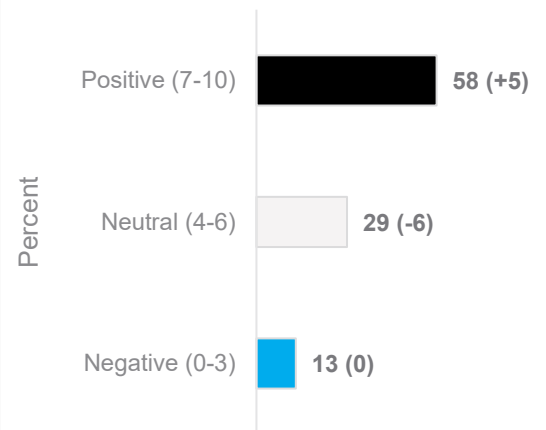
*How satisfied are you with the provision of your electricity and gas services overall in the last 6 months? (%)*



Base: Consumers in SA (n=315)

### Satisfaction with competition

*How satisfied are you with the level of competition in the energy market in your area? (%)*



Base: Consumers in SA (n=315)

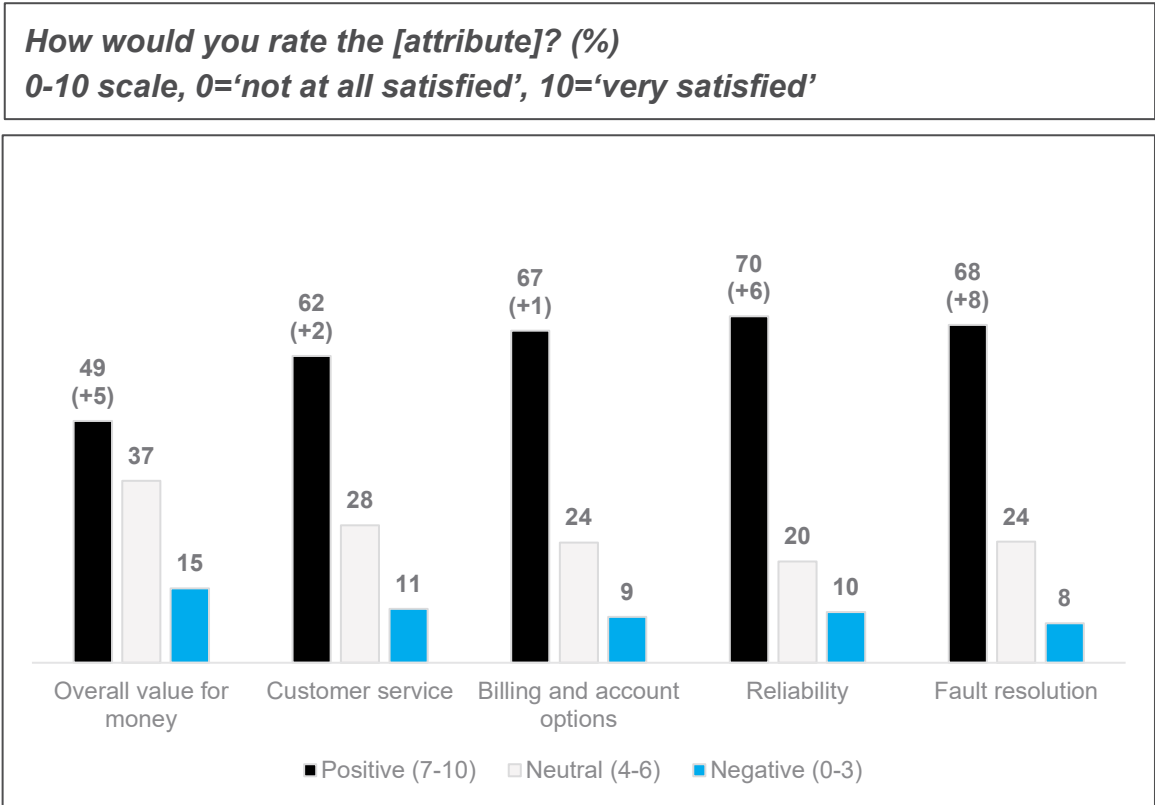


Satisfaction

Satisfaction with electricity

Satisfaction with all measures relating to electricity has increased.

- The largest increases in satisfaction were for fault resolution (up 8% to 68%), reliability (up 6% to 70%) and overall value for money (up 5% to 49%).



Base: Consumers in SA with electricity supply (n=315)  
Base for fault resolution: Those in SA who had a power outage or rated 0 to 9 satisfaction with outage (n=177)

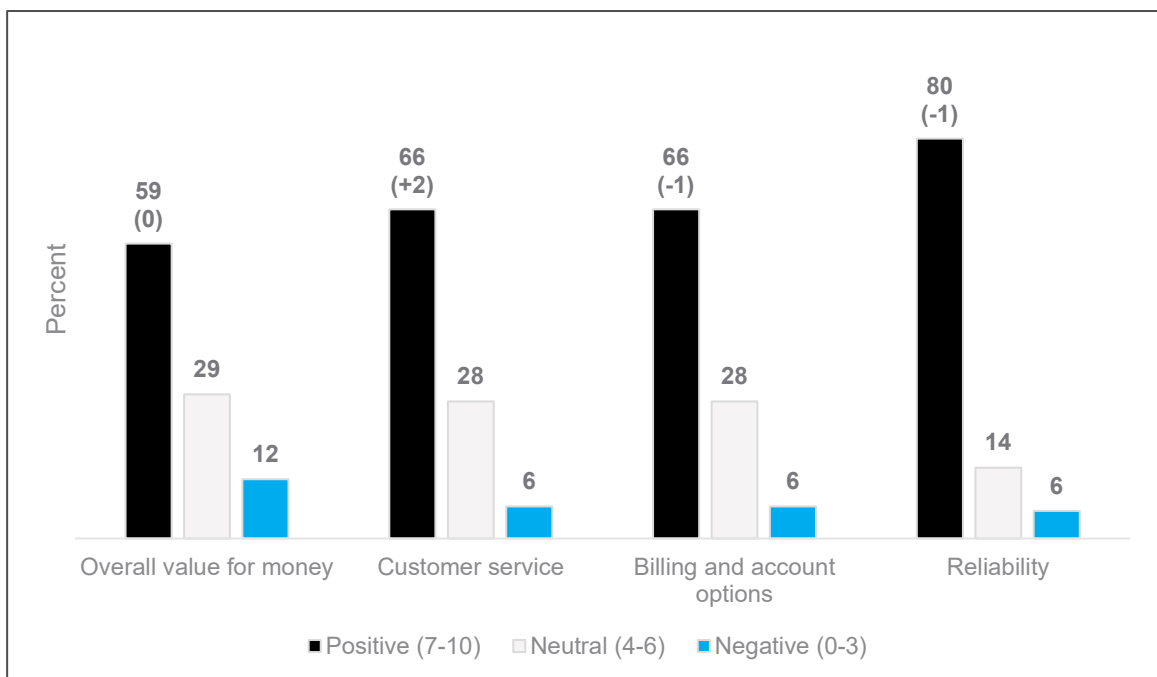


## Satisfaction with gas

Satisfaction with gas services is similar to the results reported in December 2018.

- 59% of South Australian household consumers who have gas are satisfied with the overall value for money of their gas services.
- 66% are satisfied with the customer service of their gas services.
- 66% are satisfied with their billing and account options.
- 80% are satisfied with the reliability of their gas services.

*How would you rate the [attribute]? (%)*  
*0-10 scale, 0='not at all satisfied', 10='very satisfied'*



Base: South Australian gas consumers (n=184)

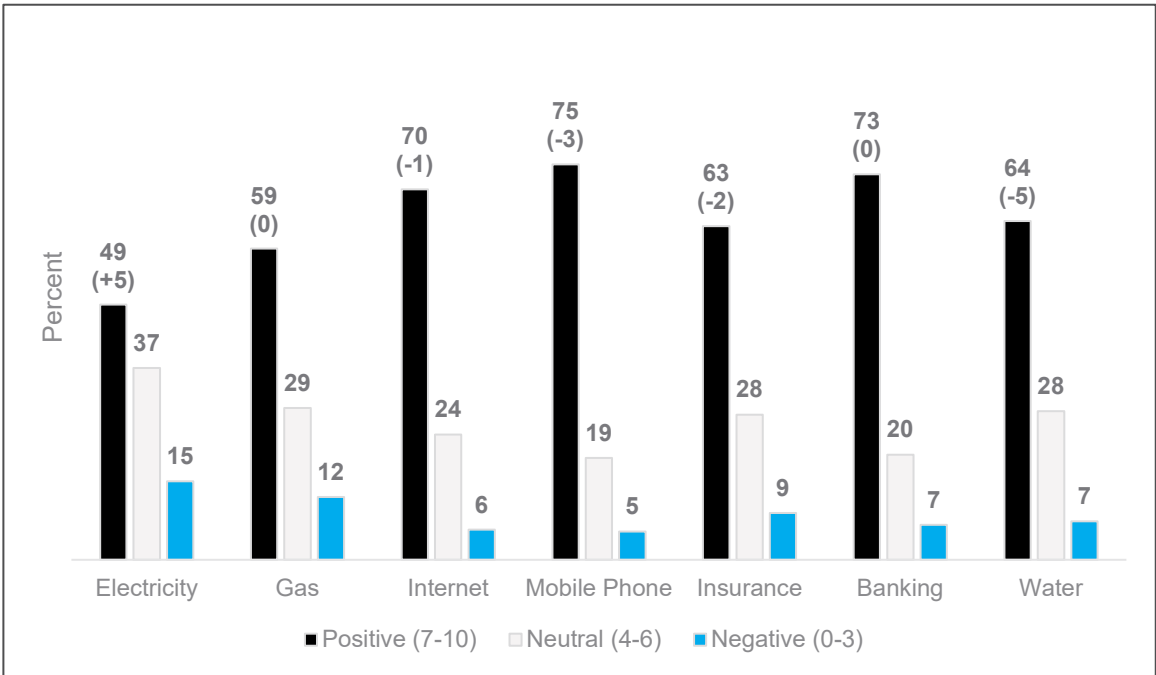


## Satisfaction with utilities and services

Consumer satisfaction with the value for money of their electricity services has increased but electricity and gas still trail all other utilities and services.

- Consumer satisfaction with the value for money of their electricity services is up 5% to 49% while gas is unchanged at 59%.
- The highest level of satisfaction for comparable services is for mobile phone services (75%).

***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? (%)***  
***0-10 scale, 0='very poor', 10='excellent'***



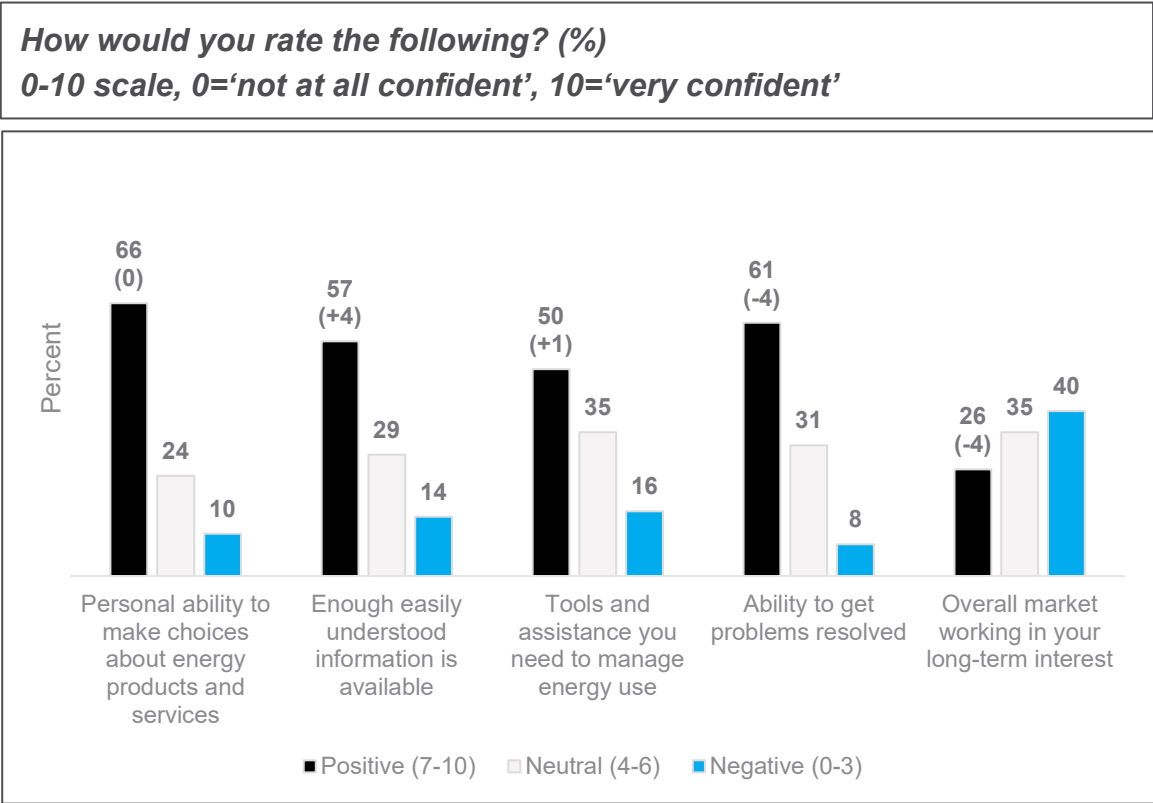
Base: Consumers in SA (n=315)



## Confidence in information, tools and a working market

Confidence that enough easily understood information is available in the market increased but only a quarter expressed confidence in the overall market working in their best interest.

- Overall confidence that the market is working in consumers’ interests is down 4% to 26%.
- Consumer confidence in their ability to make choices (66%) and resolve issues (61%) continues to be stronger than their belief that the information available to them is easy to understand (57%) and that tools are available to assist them (50%).



Base: Consumers in SA (n=315)



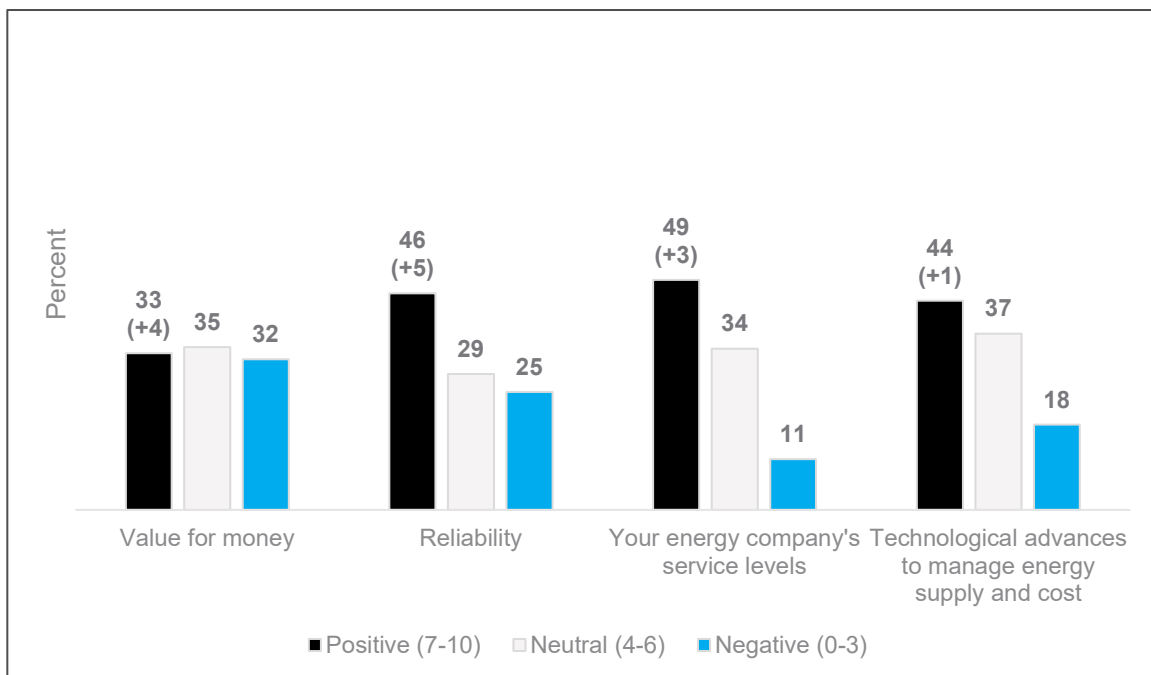
## Confidence in long term outcomes

South Australian household consumers' confidence that the market will deliver better long-term outcomes in the future has generally increased, but confidence in future value for money continues to lag other measures.

- Confidence that reliability will improve increased by 5% to 46%.
- Confidence that service levels will improve increased by 3% to 49%.
- Confidence in better technological advances in the future to manage energy supply and cost has increased to 44%.
- Confidence that consumers will see better overall value for money in the future increased by 4% to 33%.

**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'**



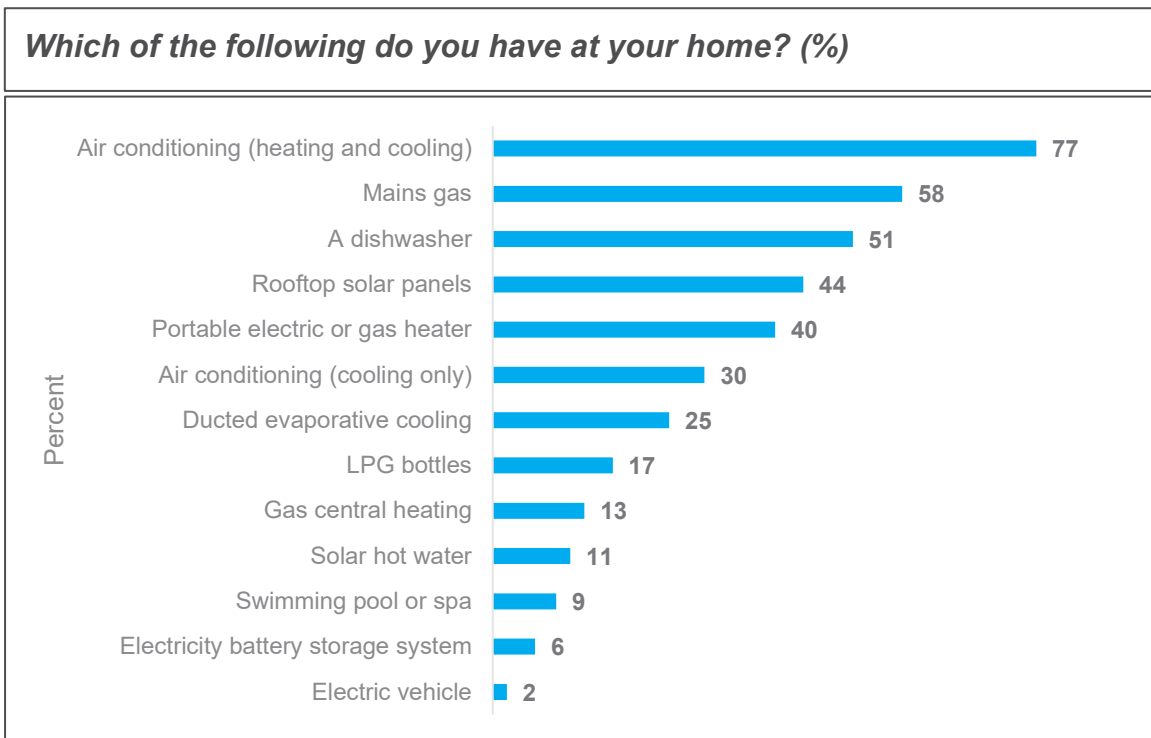
Base: Consumers in SA (n=315)



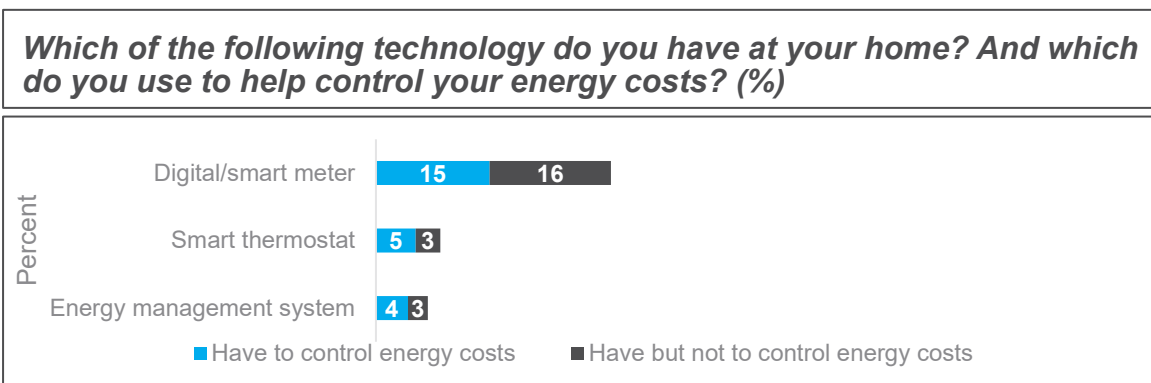
## Uptake of technologies

**South Australians in this survey have the highest declared uptake of rooftop solar and of air conditioning that is used for both heating & cooling.**

- 44% of households in South Australia report having rooftop solar and 77% have air conditioning that they use for heating and cooling.
- 31% say they have a smart/digital meter but only 15% say they use it to manage their energy use and costs.



Base: Consumers in SA (n=315)



Base: Consumers in SA (n=315)

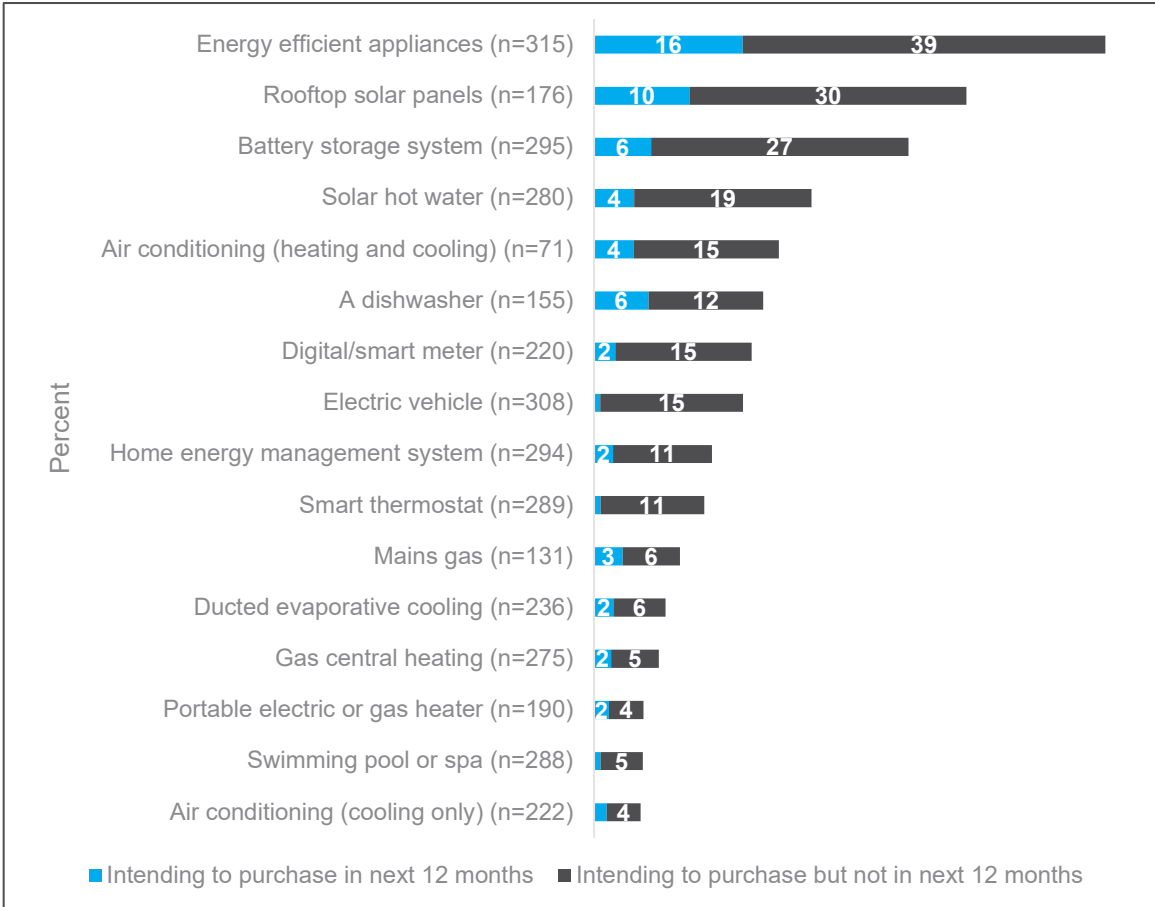


## Future uptake of technologies

### A third of South Australian household consumers who don't currently have rooftop solar say they intend to buy a battery storage system

- Of those households who reported having solar panels, 45% expressed interest in adding a battery storage system.
- 55% say they are considering more energy efficient appliances (16% plan to purchase some in the next 12 months).
- 33% of those who do not currently have a battery storage system are considering it (6% within the next year).
- 40% of those who do not have rooftop solar say they are considering solar panels which is the higher than other states and territories.

**Which of the following are you intending to purchase for your home? (%)**



Note: Other than 'energy efficient appliances' which was asked of the entire sample, figures are the percentage of those who do not already have that technology in their home in South Australia

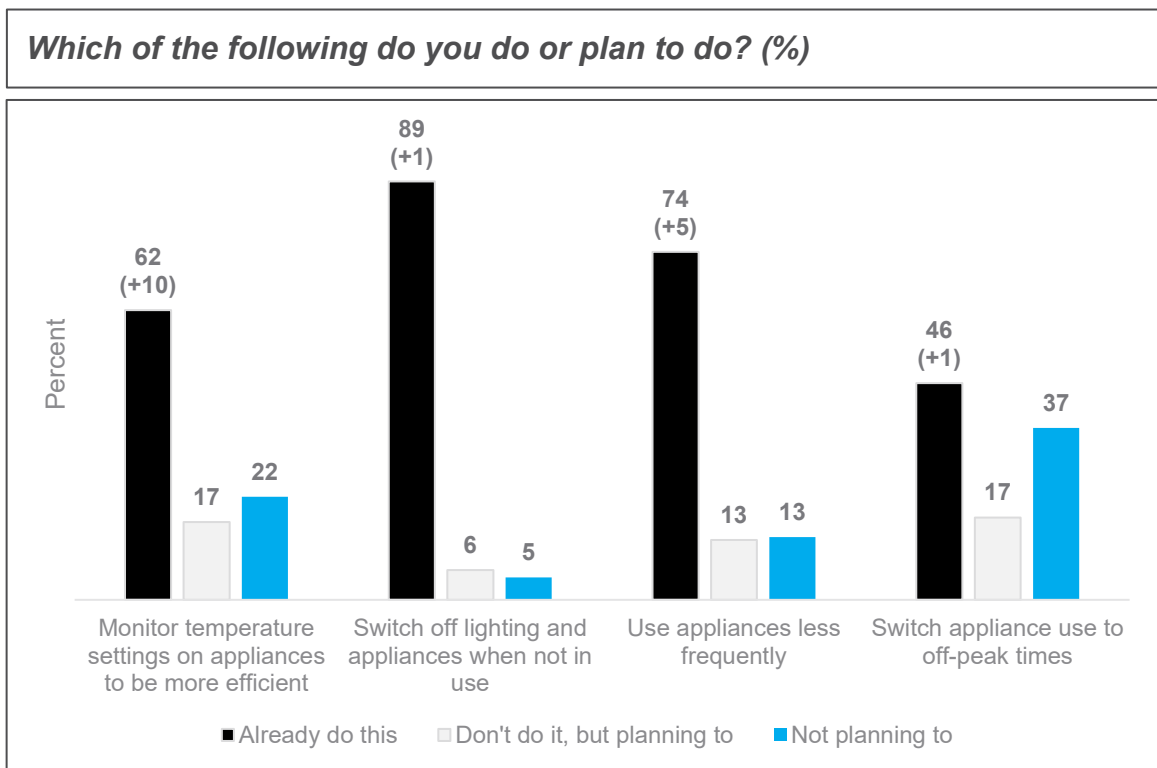




## Energy saving practices

South Australian household consumers are actively managing their energy use.

- 89% say they already switch off lighting and appliances when not in use, and 74% use appliances less frequently (up 5%).
- 62% say they monitor temperature settings on their appliances (up 10%).
- 46% say they have already switched appliance use to off-peak times (up 1%).



Base: Consumers in SA (n=315)

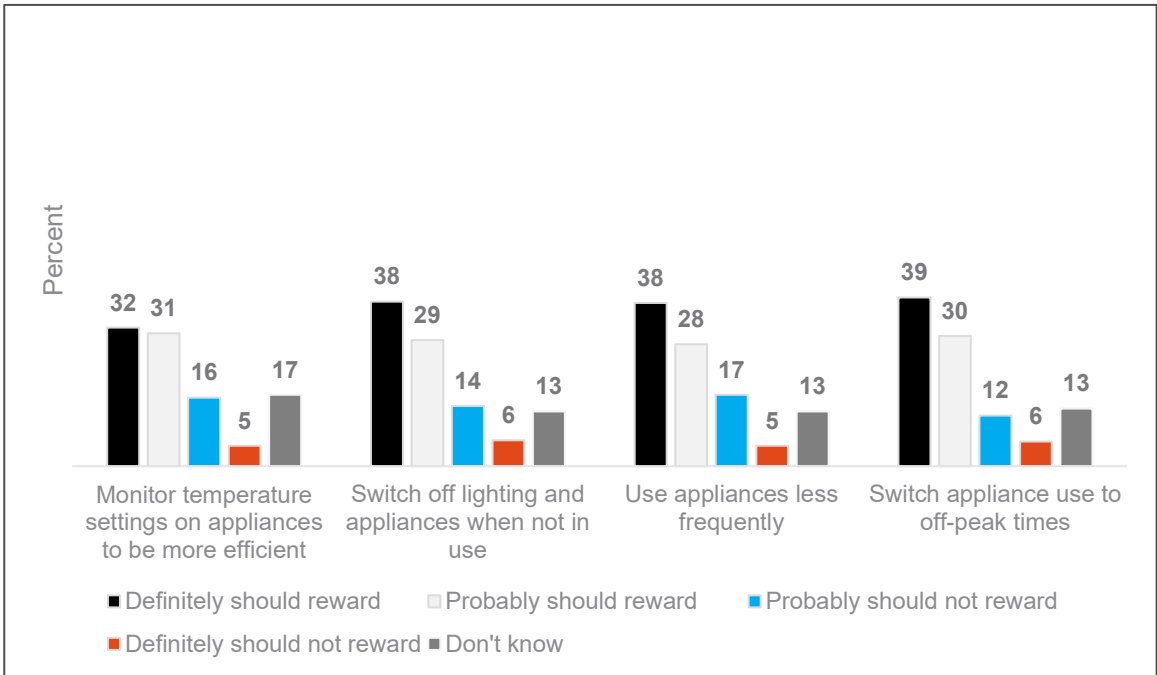


## Reward for reducing energy use

**Most South Australian household consumers think customers should be rewarded for reducing their energy usage.**

- 69% think electricity companies should do more to financially reward customers who switch appliance use to off-peak times (up 3%).
- 67% think electricity companies should do more to financially reward customers who switch off lighting and appliances when not in use (up 3%).
- 66% think electricity companies should do more to financially reward customers who use appliances less frequently (up 2%).
- 63% think electricity companies should do more to financially reward customers who monitor temperature setting on appliances to be more efficient (up 3%).

***Should electricity companies do more to financially reward customers who do the following: (%)***



Base: Consumers in SA (n=315)

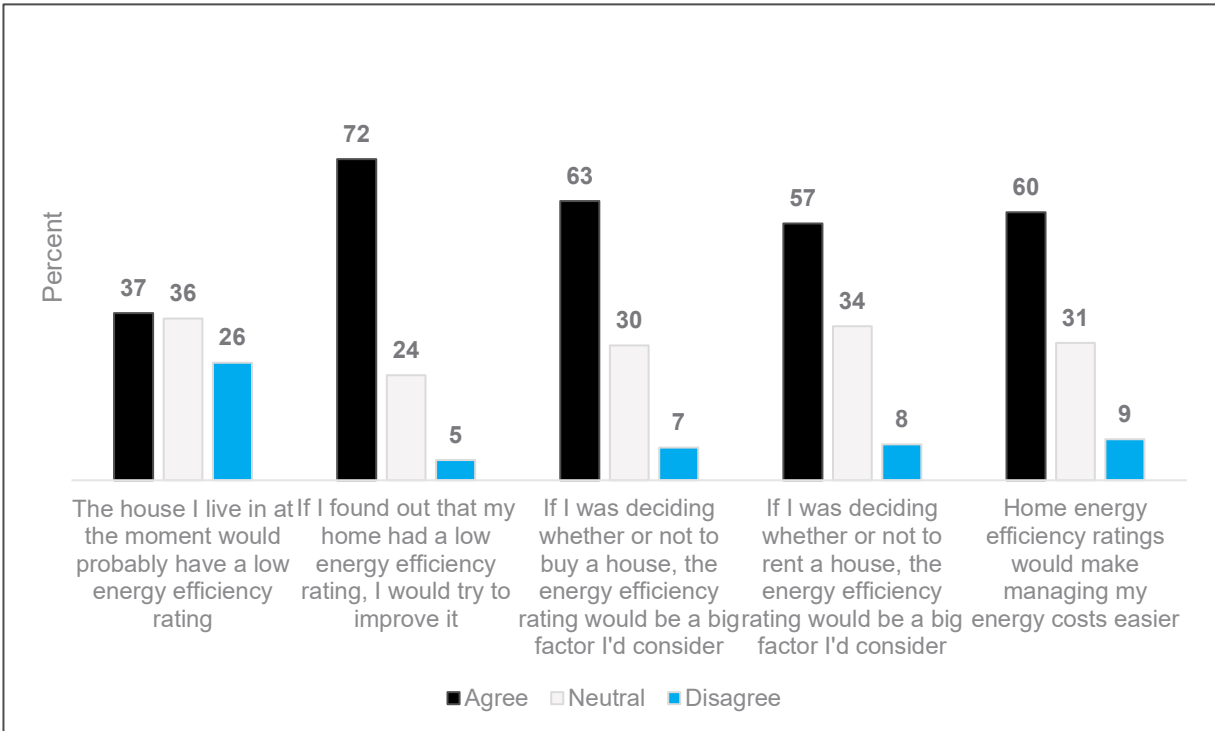


## Housing energy efficiency

Only one in four household consumers in South Australia thinks the house they currently live in would *not* have a low energy efficiency rating.

- 37% believe that their house would probably have a low energy efficiency rating, while 36% could not say whether their home was energy efficient.
- 72% said they would try to improve their home's energy rating if they found out it had a low rating (up 3%).
- 63% said that an energy efficiency rating would be a big factor they would consider when buying a house (up 9%).
- 60% said that a home energy efficiency rating would make managing their energy costs easier (up 10%).
- 57% of renters said that an energy efficiency rating would be a big factor they would consider when renting a house (up 5%).

**Do you agree or disagree with the following? (%)**



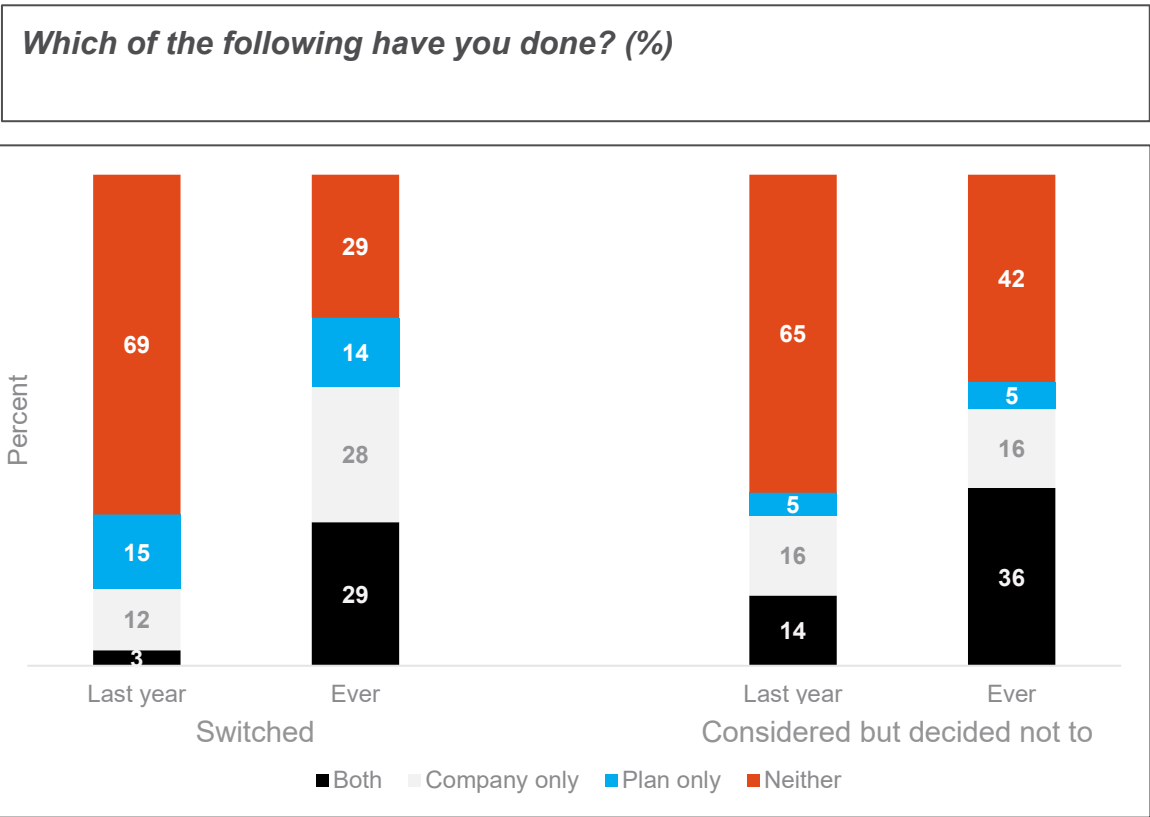
Base for 'current house having a low energy rating', 'consider energy rating when purchasing a home' and 'home energy ratings would make managing my energy costs easier': Consumers in SA (n=315)  
 Base for 'I would try to improve my home energy efficiency': Home-owners in SA (n=221)  
 Base for 'consider energy rating when renting': Renters in SA (n=87)



## Switching behaviour

The proportion of South Australian consumers saying they have switched companies or plans in the past year is the same as the proportion who say that they have never switched.

- 30% report switching in the past year while another 35% said they considered switching in the past year but decided not to.
- 29% say they have never switched energy companies or plans.



Base: Consumers in SA (n=315)



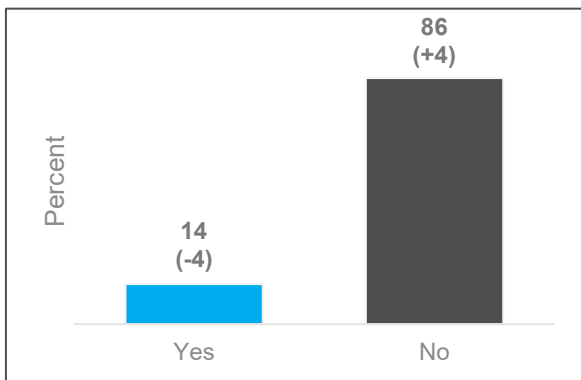
Activity

## Reasons for considering switching

Low satisfaction with the value for money of their electricity service is the most common driver for South Australians to look at switching.

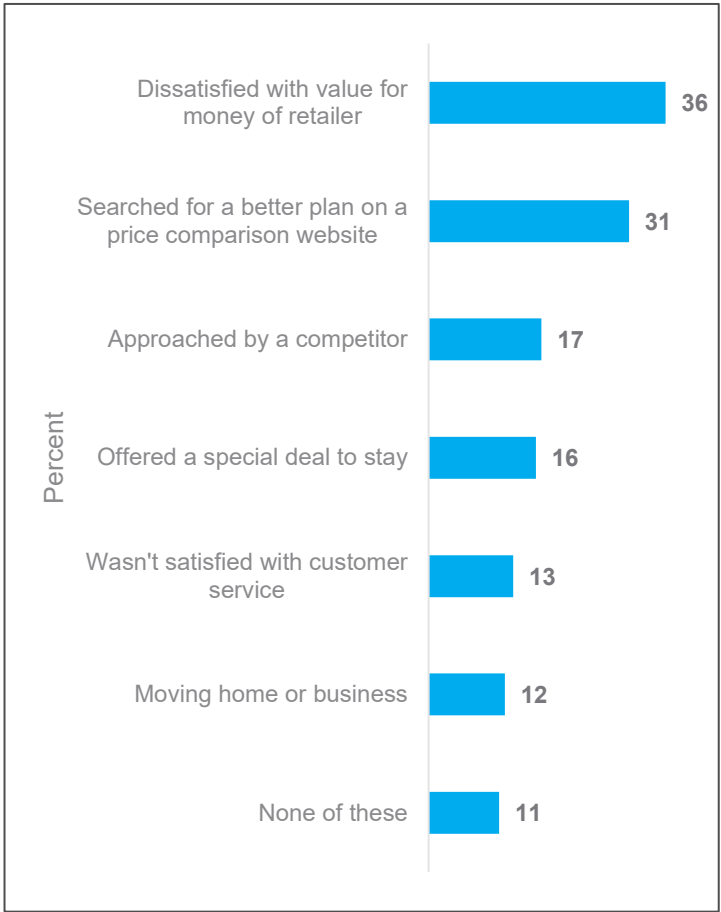
- 36% of those who switched companies said they weren't satisfied with the value for money of the service provided by their supplier.
- 31% said they looked at a price comparison website the last time they considered switching.
- 14% plan to switch energy companies or plans in the next year.

**Do you intend to switch energy companies or energy plans in the next year? (%)**



Base: Consumers in SA (n=315)

**Thinking of the last time you were looking at switching energy companies, which of the following apply to you? (%)**



Base: Consumers in SA who have switched or looked at switching in the past (n=231)

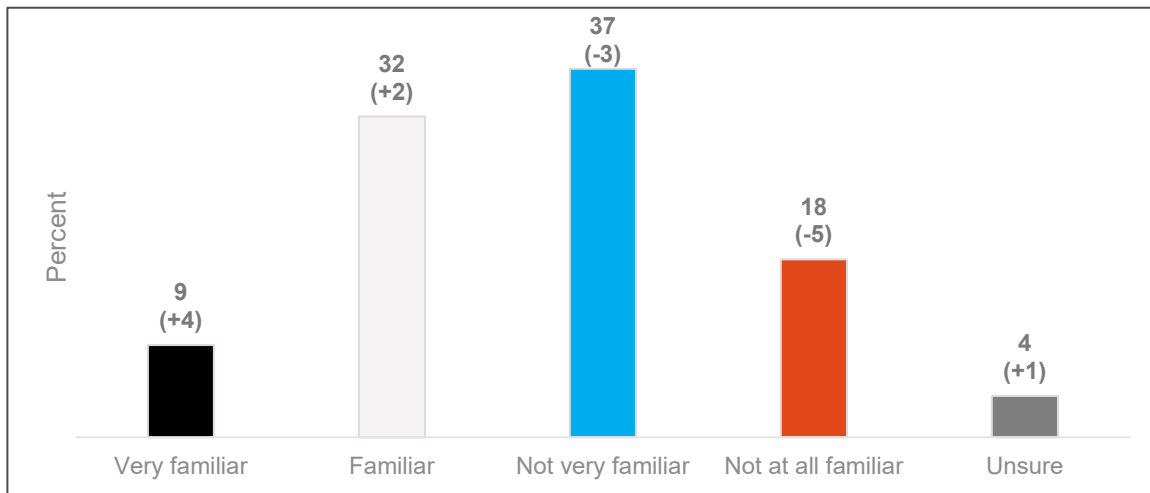


Other

## Awareness of the Energy Ombudsman

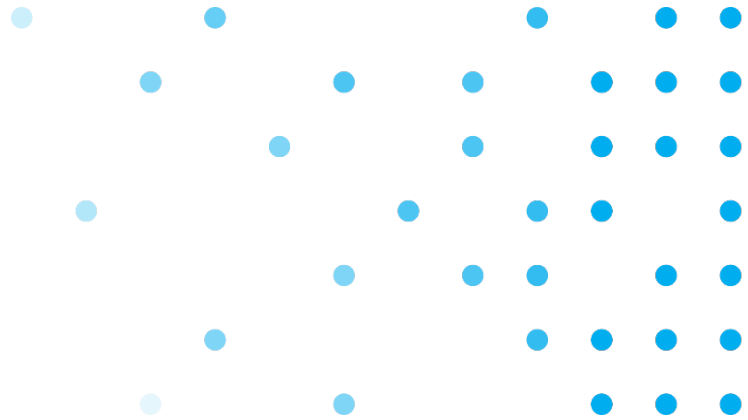
41% say they are very familiar or familiar with the Energy Ombudsman (up 6%).

**How familiar are you with an organisation called the Energy Ombudsman, which assists consumers with complaints about energy? (%)**



Base: Consumers in SA (n=315)

# Tasmania





## Overall satisfaction

The overall satisfaction with electricity services has increased among Tasmanian household consumers.

- 76% say they are satisfied, up 17%.

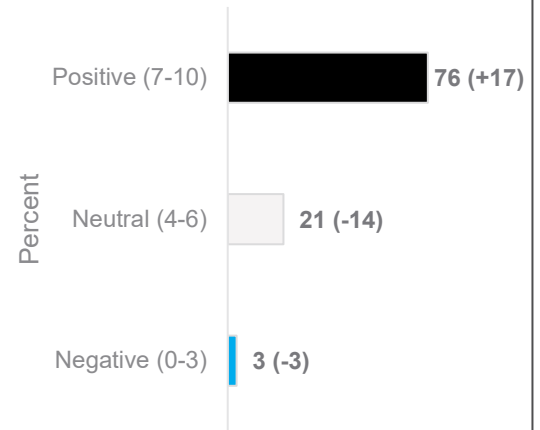
Satisfaction with levels of competition in Tasmania increased from a low level.

- 26% say they are satisfied, up 19%.

## Satisfaction

### Overall Satisfaction

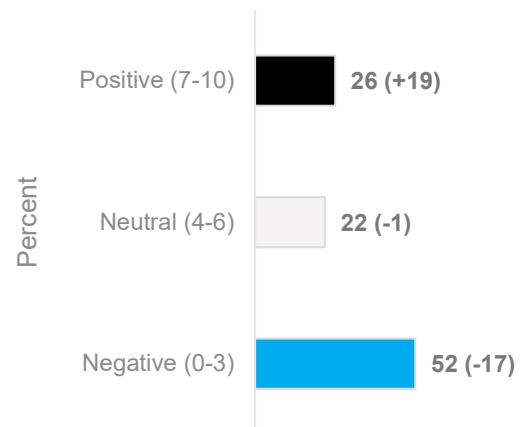
*How satisfied are you with the provision of your electricity and gas services overall in the last 6 months? (%)*



Base: Consumers in TAS (n=209)

### Satisfaction with competition

*How satisfied are you with the level of competition in the energy market in your area? (%)*



Base: Consumers in TAS (n=209)





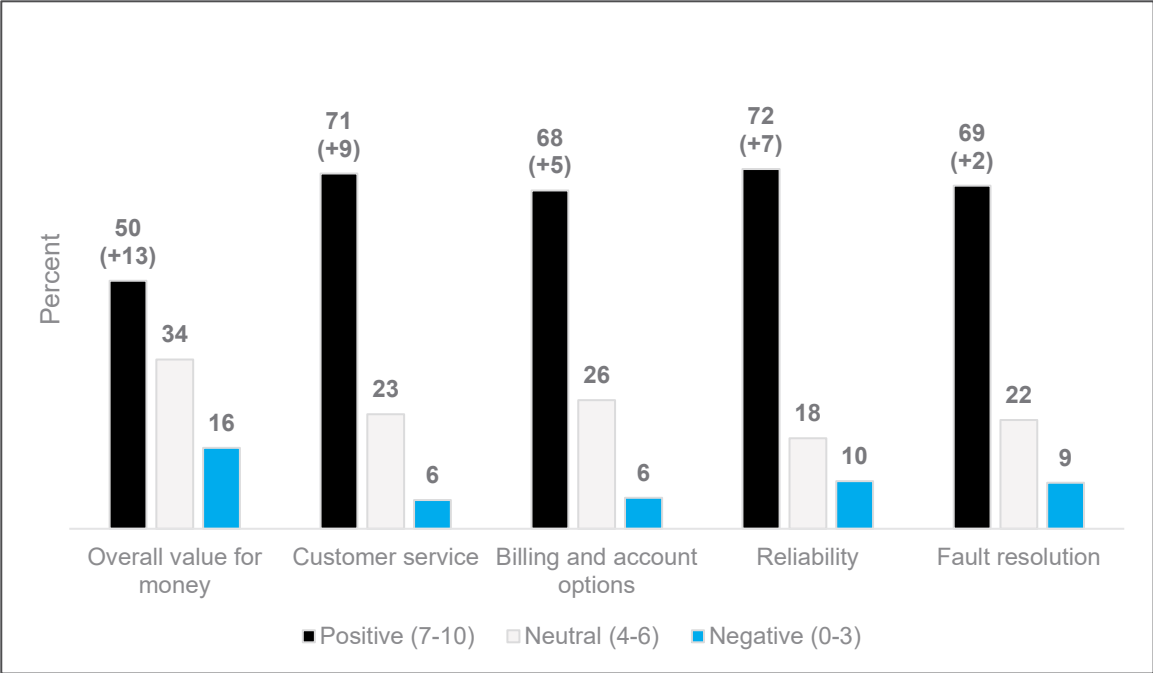
Satisfaction

Satisfaction with electricity

Satisfaction with electricity has risen across all measures in Tasmania.

- Satisfaction with overall value for money has increased 13% to 50, but this measure still lags other measures of satisfaction.
- 72% of Tasmanian household consumers are satisfied with the reliability of electricity supply (up 7%).
- 71% of Tasmanian household consumers are satisfied with the customer service they receive (up 9%).
- Satisfaction with fault resolution is up to 69%.
- Satisfaction with the available billing and account options is 68% (up 5%).

**How would you rate the [attribute]? (%)**  
**0-10 scale, 0='not at all satisfied', 10='very satisfied'**



Base: Consumers in TAS with electricity supply (n=209)  
Base for fault resolution: Those in TAS who had a power outage or rated 0 to 9 satisfaction with outage (n=119)



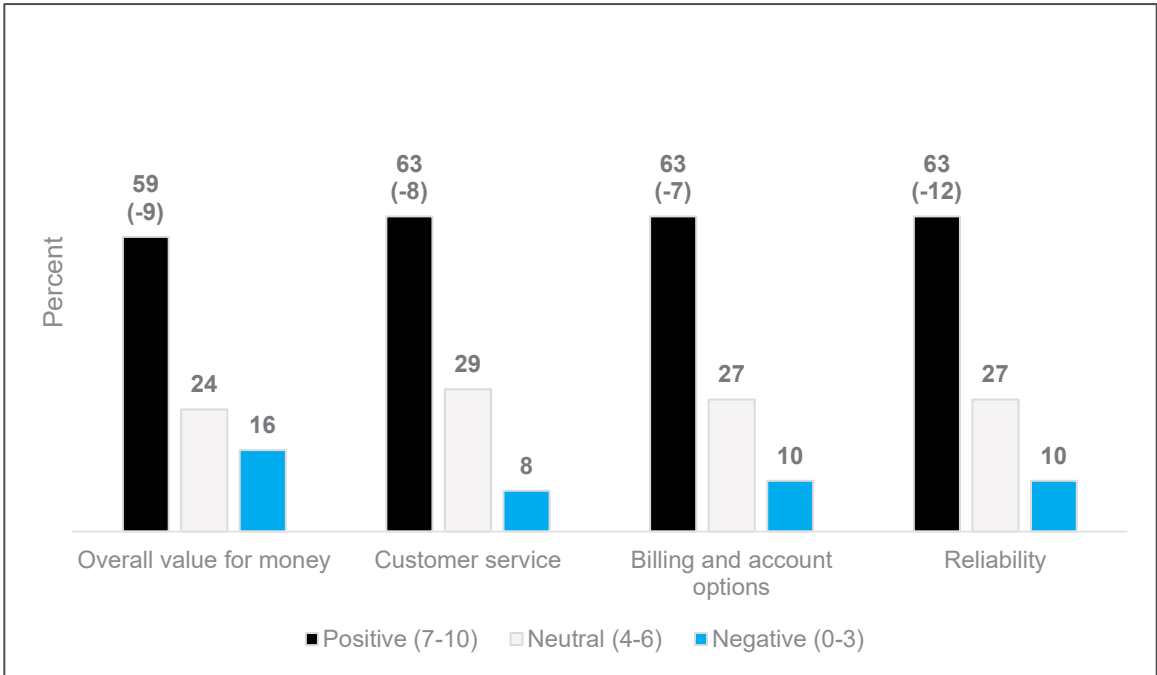
Satisfaction

### Satisfaction with gas

Tasmanian household gas consumers are less satisfied across all measures.

- 63% are satisfied with their customer service, down 8%.
- 63% are satisfied with the reliability of their gas services, down 12%.
- 63% are satisfied with the available billing and account options, down 7%.
- 59% are satisfied with the overall value for money provided by their gas service provider, down 9%.

**How would you rate the [attribute]? (%)**  
**0-10 scale, 0='not at all satisfied', 10='very satisfied'**



Base: Consumers in TAS with gas supply (n=14)  
Note: Small sample size – results are indicative only



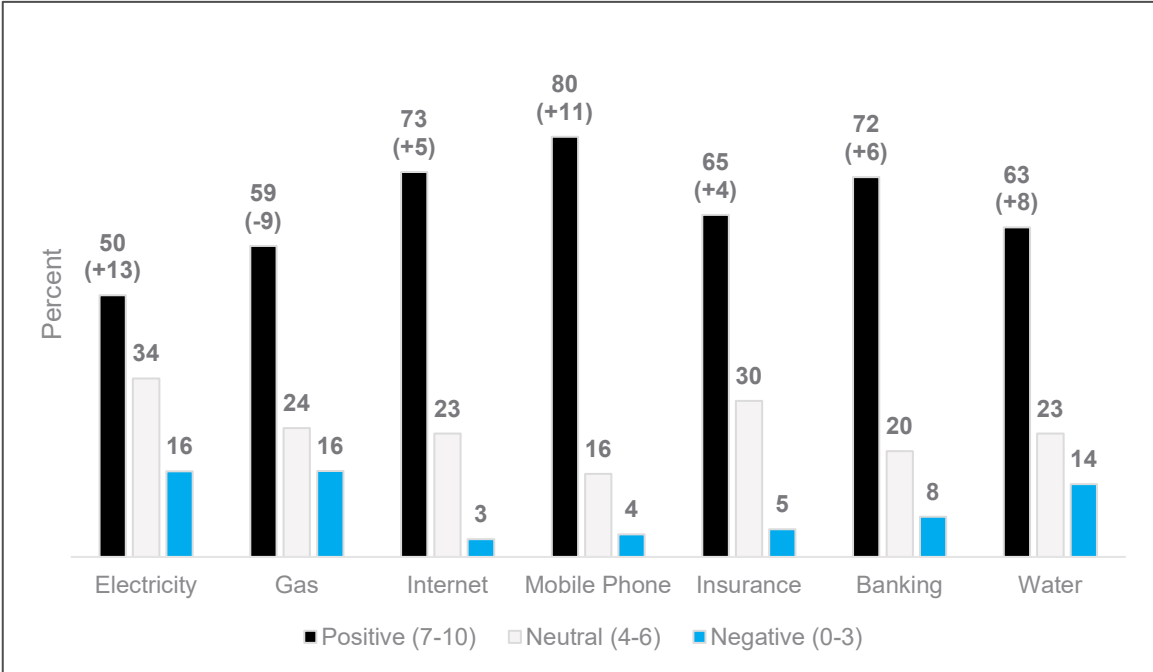
Satisfaction

## Satisfaction with utilities and services

Satisfaction with the value for money of electricity and gas services still trails all comparable utilities and services.

- Satisfaction with electricity increased by 13%, but still only 50% of Tasmanian consumers are satisfied.
- 59% are satisfied with their gas services overall (down 9%).

*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? (%)*  
*0-10 scale, 0='very poor', 10='excellent'*



Base: Consumers in TAS (n=209)



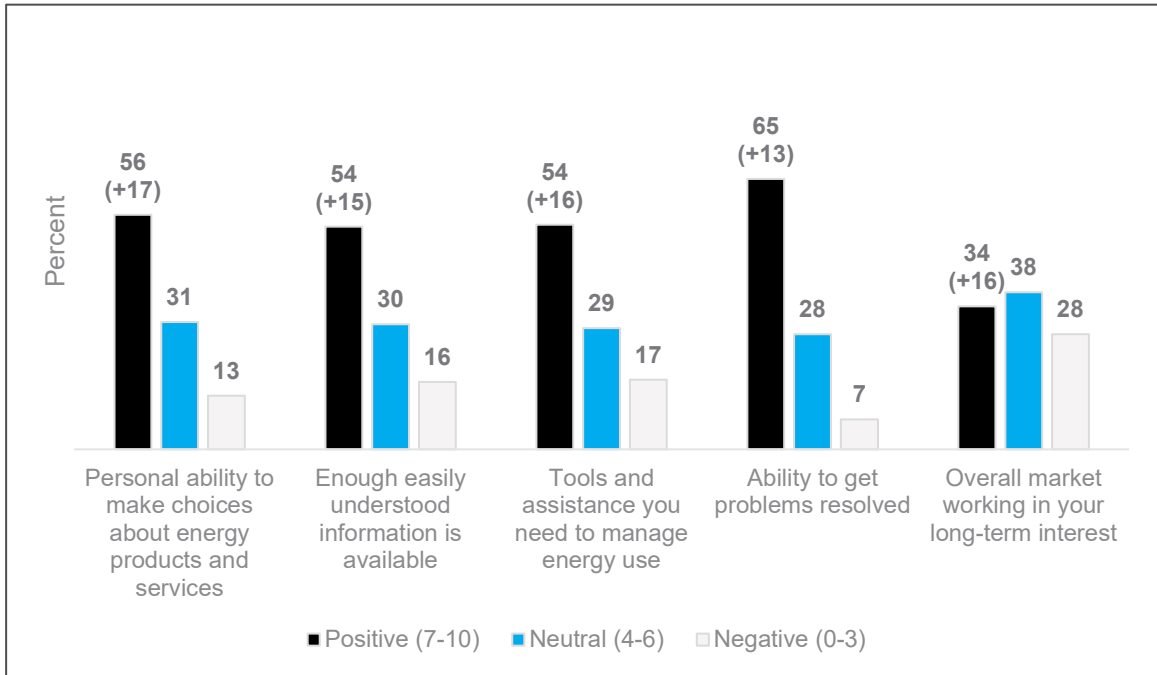
Confidence

## Confidence in information, tools and working market

Confidence in all measures increased compared with results reported in December 2018.

- Confidence the market is working in consumers' long-term interest has increased 16% to 34% among Tasmanian households.
- Consumers' confidence in their personal ability to get problems resolved is up 13% to 65%; and confidence in their ability to make choices about energy products and services increased 17% to 56%.
- Consumer confidence that there is enough easily understood information (54%) and tools (54%) to help them has improved by 15% and 16% respectively.

**How would you rate the following? (%)**  
**0-10 scale, 0='not at all confident', 10='very confident'**



Base: Consumers in TAS (n=209)



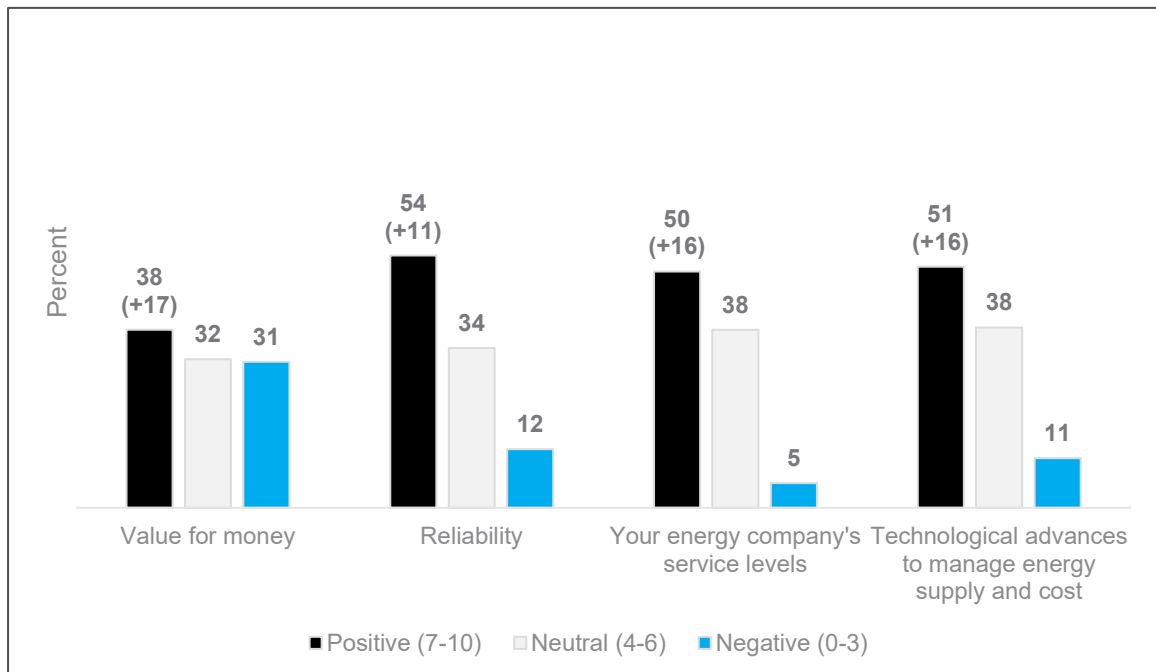
## Confidence in long term outcomes

Confidence that market outcomes will improve in the future has increased across the board, but confidence in future value for money continues to lag other measures.

- 54% are now confident that the market will deliver greater reliability (up 11%), and 51% are confident that the market will deliver technological advances to manage energy supply and cost (up 16%).
- Confidence in future service levels increased 16% to 50%.
- Consumer confidence the market will deliver better value for money outcomes in the future is comparably low (up 17% to 38%).

**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'**



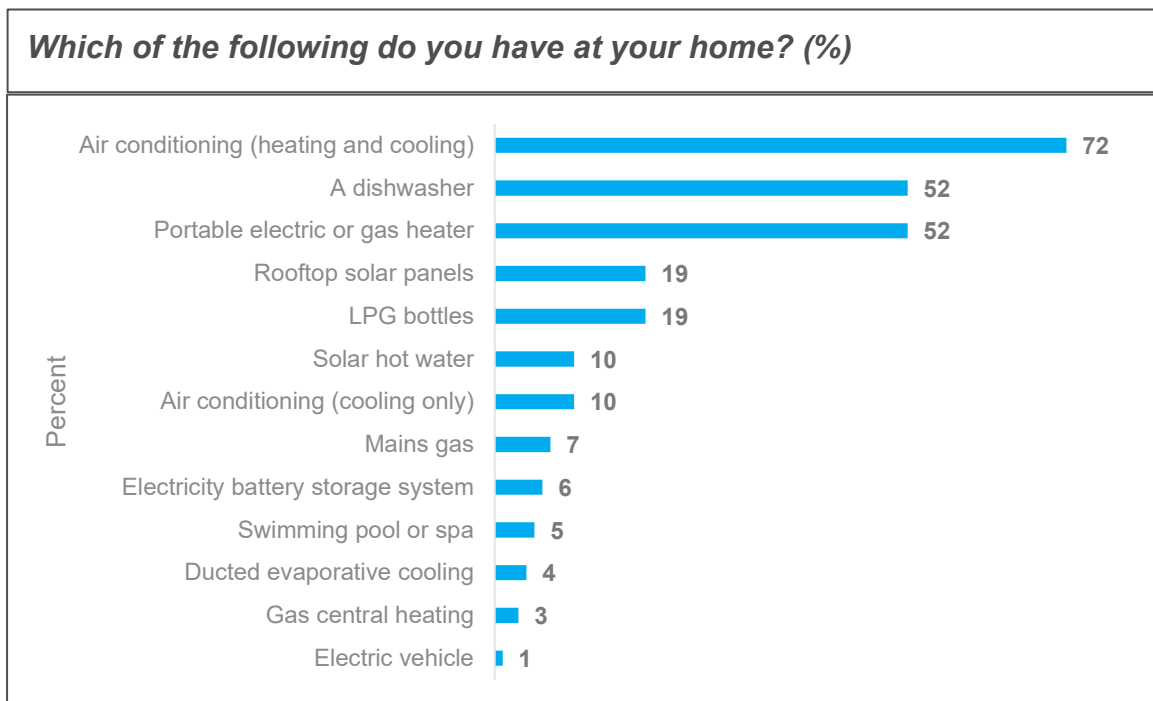
Base: Consumers in TAS (n=209)



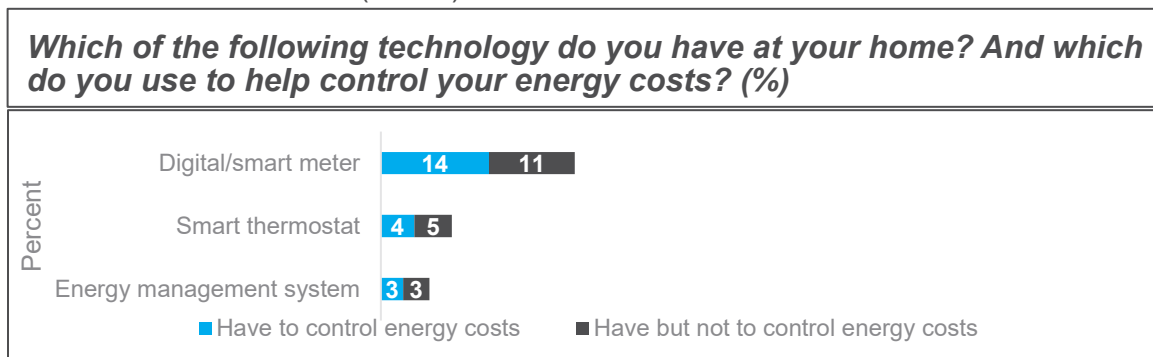
## Uptake of technologies

Nearly one in five household consumers report having rooftop solar in Australia’s southern-most state.

- Only 3% have gas central heating, and 52% say they have a portable heater.
- 72% say that they have air conditioning that they use for both heating and cooling (behind only South Australia).
- 25% say they have a smart/digital meter but only 14% say they use it to control their energy use and costs.



Base: Consumers in TAS (n=209)



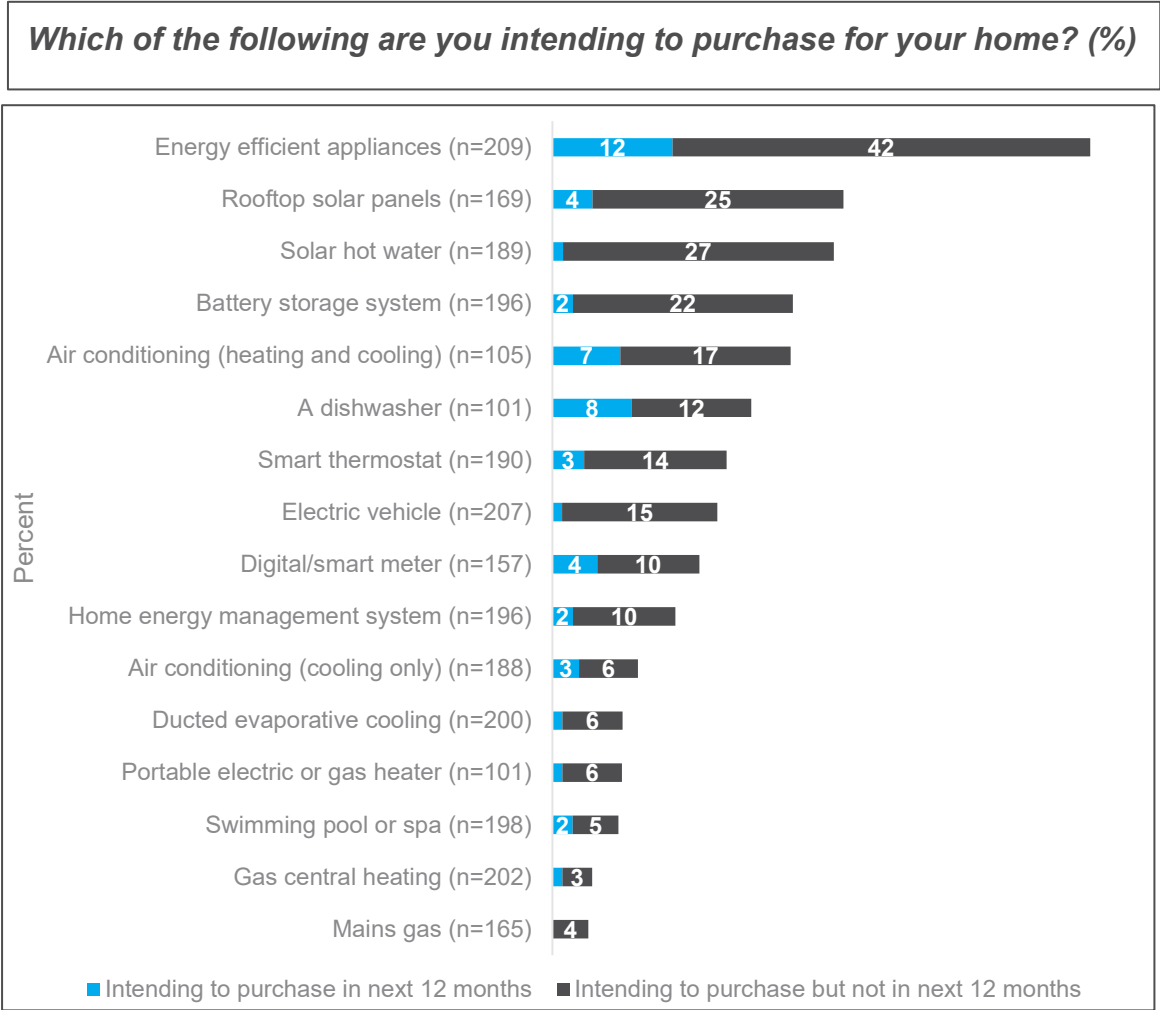
Base: Consumers in TAS (n=209)



## Future uptake of technologies

**Few Tasmanian household consumers are considering rooftop solar in the next year, although more than a quarter of those who do not have it already are thinking about installing rooftop solar at some point.**

- Of those households who reported having solar panels, 50% expressed interest in adding a battery storage system.
- Just 4% say that they are intending to install rooftop solar in the year ahead (the lowest of any state or territory), but 25% say that they are considering it beyond that time period.
- 28% of Tasmanian household consumers are considering purchasing solar hot water.



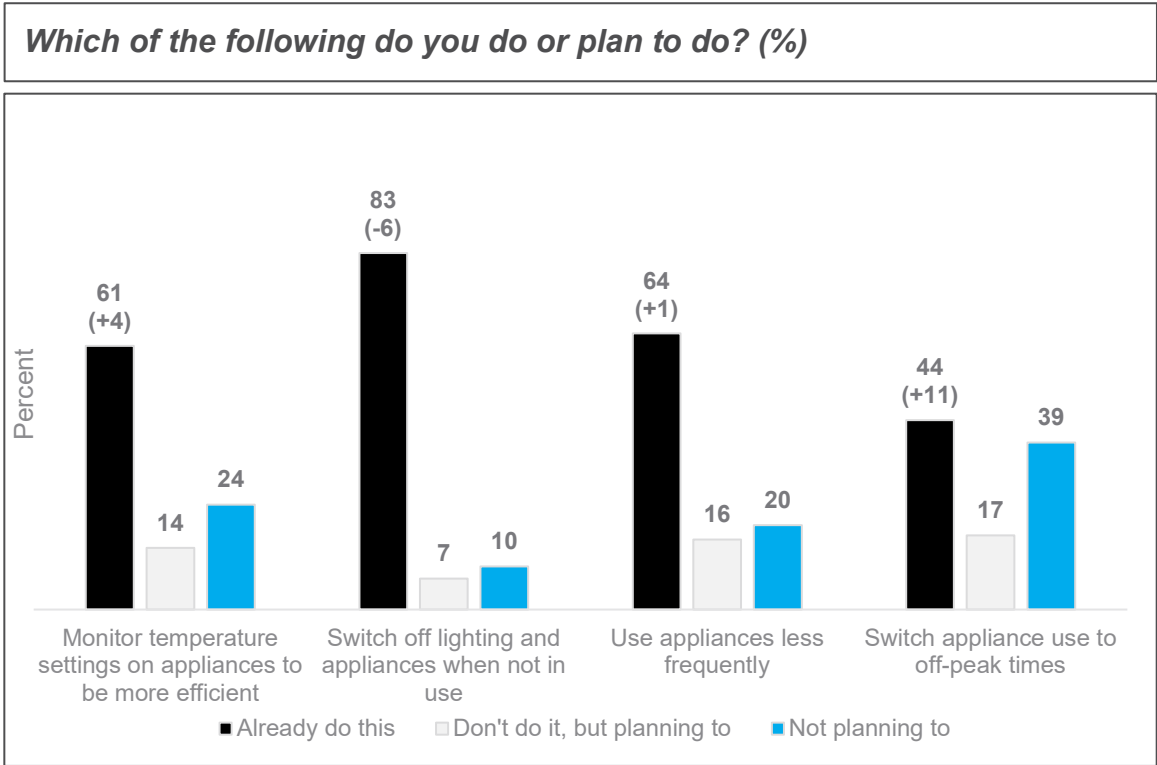
Note: Other than 'energy efficient appliances' which was asked of the entire sample, figures are the percentage of those who do not already have that technology in their home in Tasmania.



## Energy saving practices

Tasmanian household consumers are already actively managing their energy use.

- 83% say they switch off lighting and appliances when not in use (down 6%).
- 64% say they use appliances less frequently (up 1%).
- 61% say they monitor the temperature settings on appliances (up 4%).
- 44% say they already switch their use of appliances to off-peak times (up 11%).



Base: Consumers in TAS (n=209)



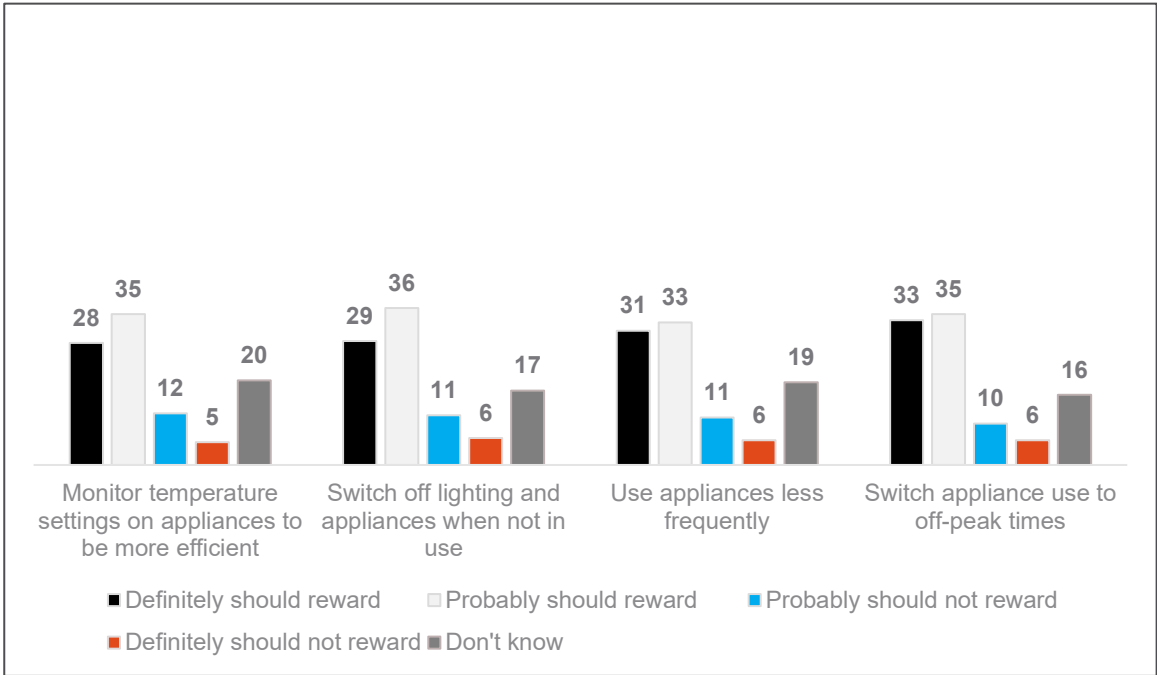


## Reward for reducing energy use

**Most Tasmanian household consumers think customers should be rewarded for taking action to reduce their energy usage, but these measures have not grown like they have in most other jurisdictions.**

- 68% think electricity companies should do more to financially reward customers who switch appliance use to off-peak times (down 2%).
- 65% think electricity companies should do more to financially reward customers who switch off lighting and appliances when not in use (down 7%).
- 64% think electricity companies should do more to financially reward customers who use appliances less frequently (unchanged).
- 63% think electricity companies should do more to financially reward customers who monitor temperature setting on appliances to be more efficient (up 1%).

***Should electricity companies do more to financially reward customers who do the following: (%)***



Base: Consumers in TAS (n=209)

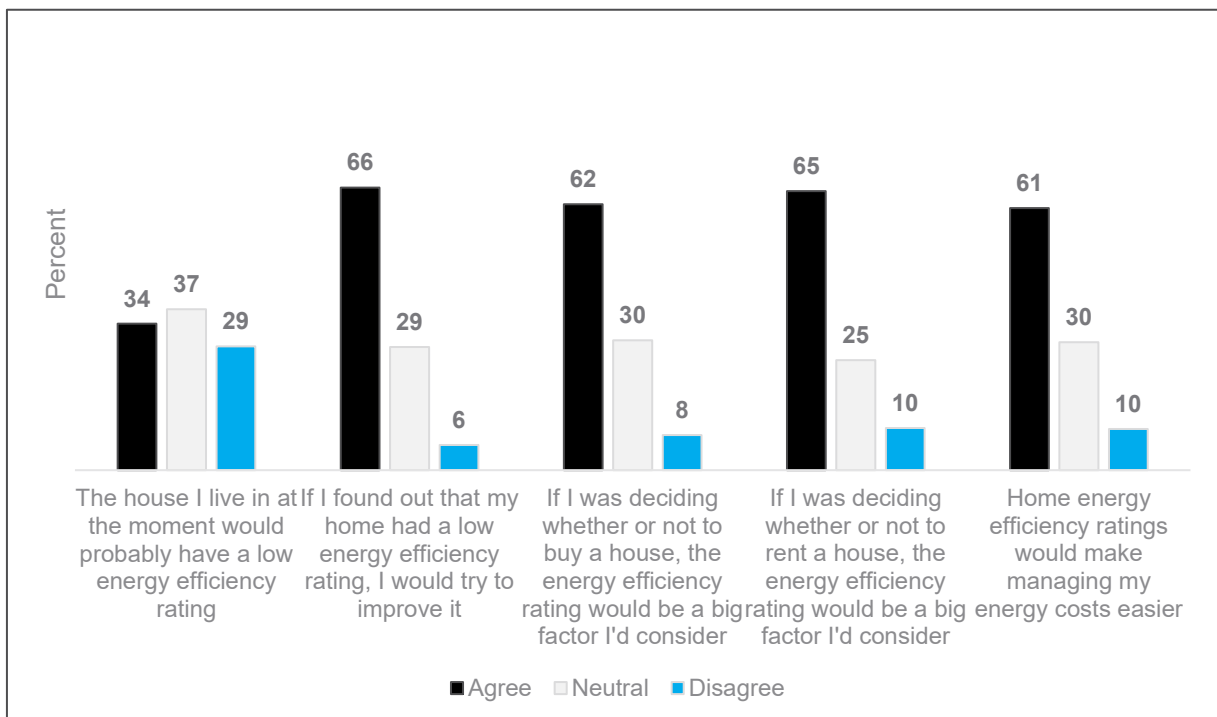


## Housing energy efficiency

**Few Tasmanian household consumers are confident their home would currently have a high energy rating.**

- 66% said they would try to improve their home’s energy efficiency rating if they found out it had a low rating (down 15%).
- 62% said that an energy efficiency rating would be a big factor they would consider when buying a house (up 2%).
- 34% of Tasmanians agree that the house they live in at the moment would probably have a low energy rating. Only 29% disagreed with the statement that their home would probably have a low energy efficiency rating.
- 65% of renters said that an energy efficiency rating would be a big factor they would consider when renting a house (up 24%, from small sample).

***Do you agree or disagree with the following? (%)***



Base for 'current house having a low energy rating', 'consider energy rating when purchasing a home' and 'home energy ratings would make managing my energy costs easier': Consumers in TAS (n=209)

Base for 'I would try to improve my home energy efficiency': Home-owners in TAS (n=154)

Base for 'consider energy rating when renting': Renters in TAS (n=51)

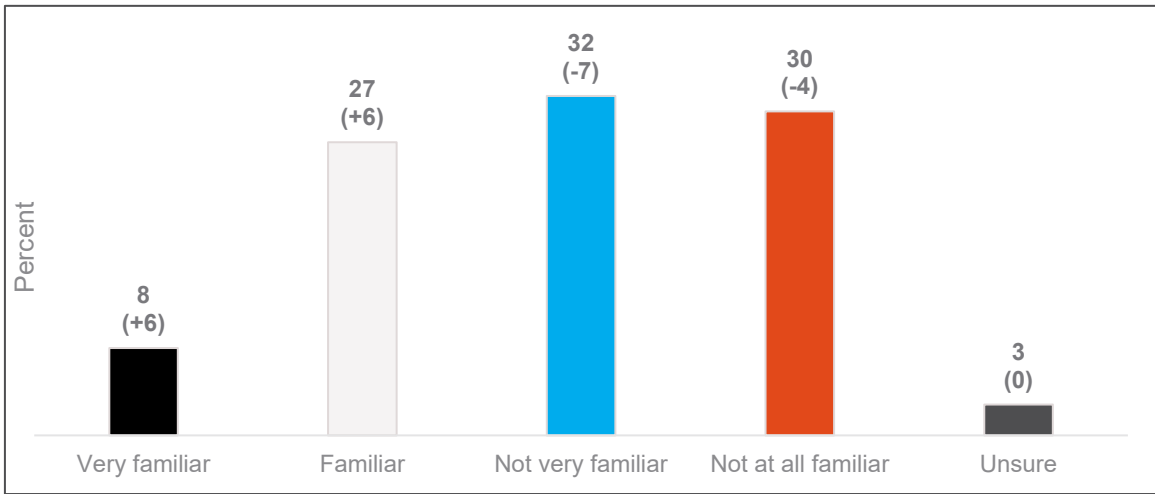


Other

## Awareness of the Energy Ombudsman

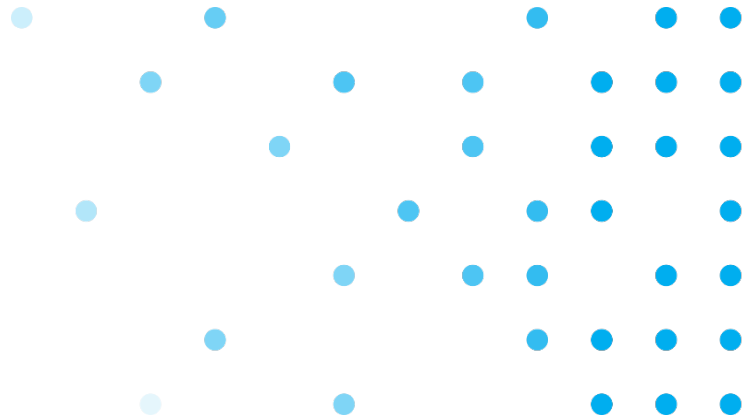
35% of Tasmanian households say that they are very familiar or familiar with the Energy Ombudsman (up 12%).

*How familiar are you with an organisation called the Energy Ombudsman, which assists consumers with complaints about energy? (%)*



Base: Consumers in TAS (n=209)

# Australian Capital Territory





## Overall satisfaction

**Satisfaction with electricity and gas services amongst household consumers in the ACT has remained unchanged.**

- 67% say they are satisfied.

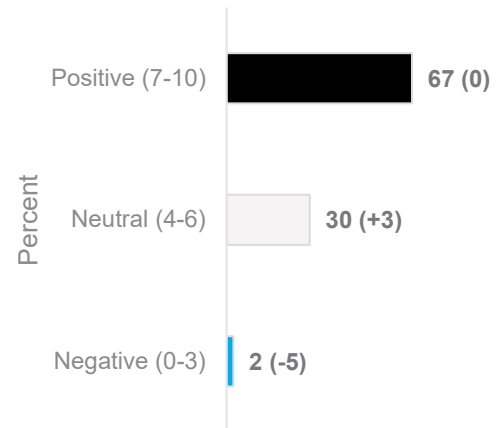
**Satisfaction with the levels of competition has increased significantly.**

- 46% of ACT household consumers now say they are satisfied, up 15%.

## Satisfaction

### Overall Satisfaction

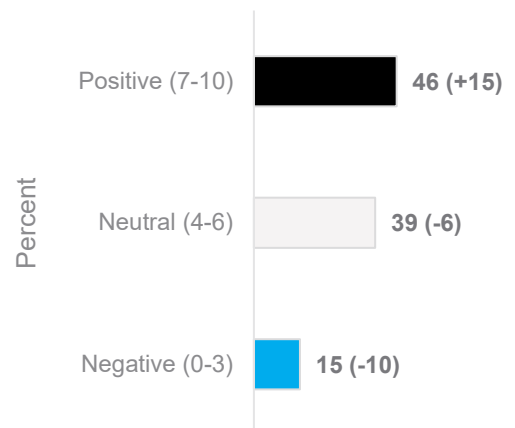
*How satisfied are you with the provision of your electricity and gas services overall in the last 6 months? (%)*



Base: Consumers in ACT (n=202)

### Satisfaction with competition

*How satisfied are you with the level of competition in the energy market in your area? (%)*



Base: Consumers in ACT (n=202)



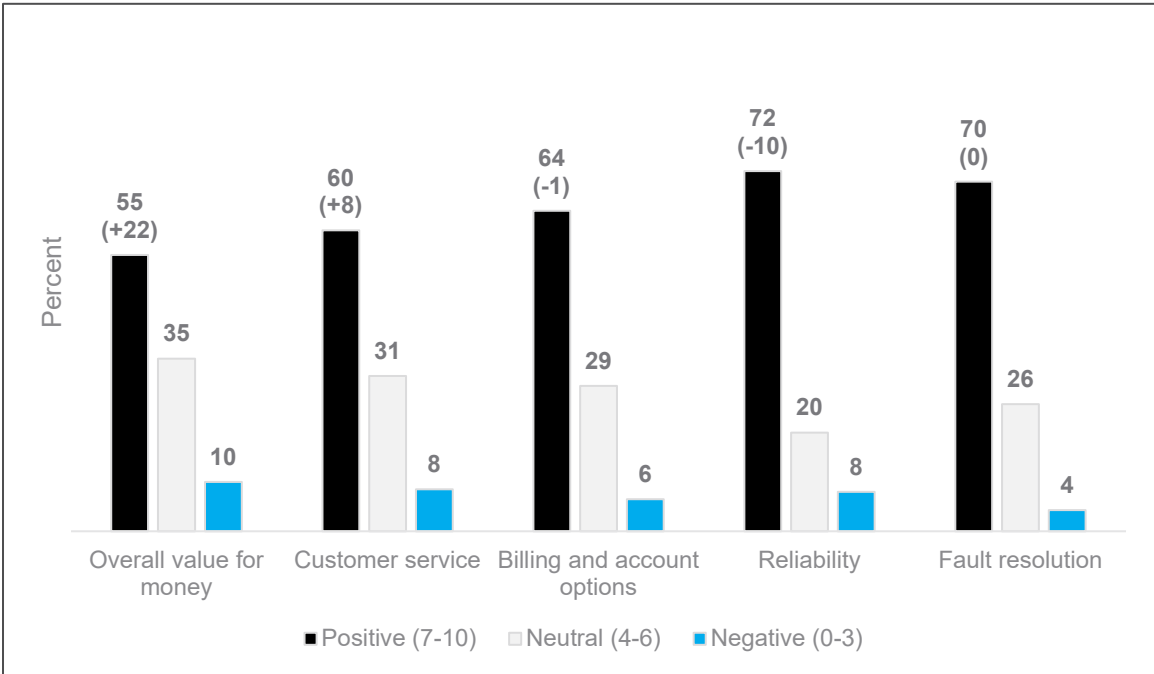
Satisfaction

Satisfaction with electricity

Satisfaction with the overall value for money of electricity services has increased.

- 55% of ACT household consumers now report being satisfied with the value for money of their electricity service (up 22%).
- Satisfaction with reliability is down 10%, but still high at 72%.

*How would you rate the [attribute]? (%)*  
*0-10 scale, 0='not at all satisfied', 10='very satisfied'*



Base: ACT electricity consumers (n=202)

Base for fault resolution: Those who had a power outage or rated 0 to 9 satisfaction with outage in ACT (n=94)



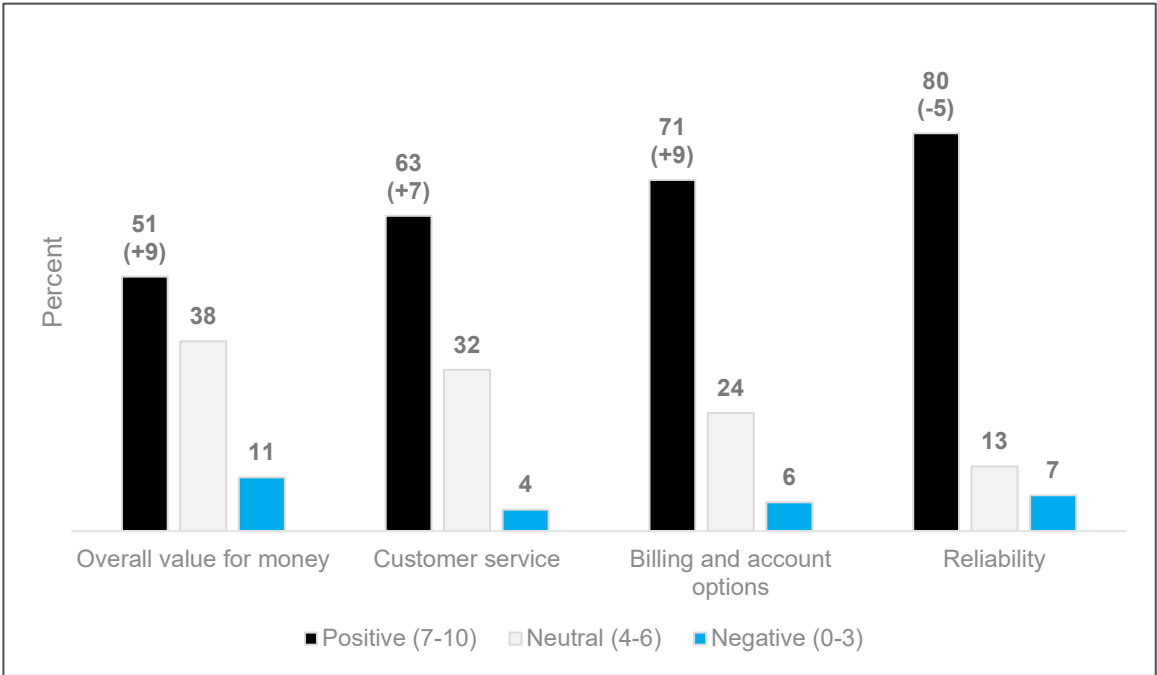
# Satisfaction

## Satisfaction with gas

Satisfaction with the value for money of gas services has increased.

- Satisfaction with overall value for money increased 9% to 51%.
- Satisfaction with billing and account options is up 9% to 71% and customer service is up 7% to 63%.
- Satisfaction with reliability is down 5% but is still at 80%.

*How would you rate the [attribute]?*  
*0-10 scale, 0='not at all satisfied', 10='very satisfied'*



Base: Consumers in ACT with gas supply (n=139)



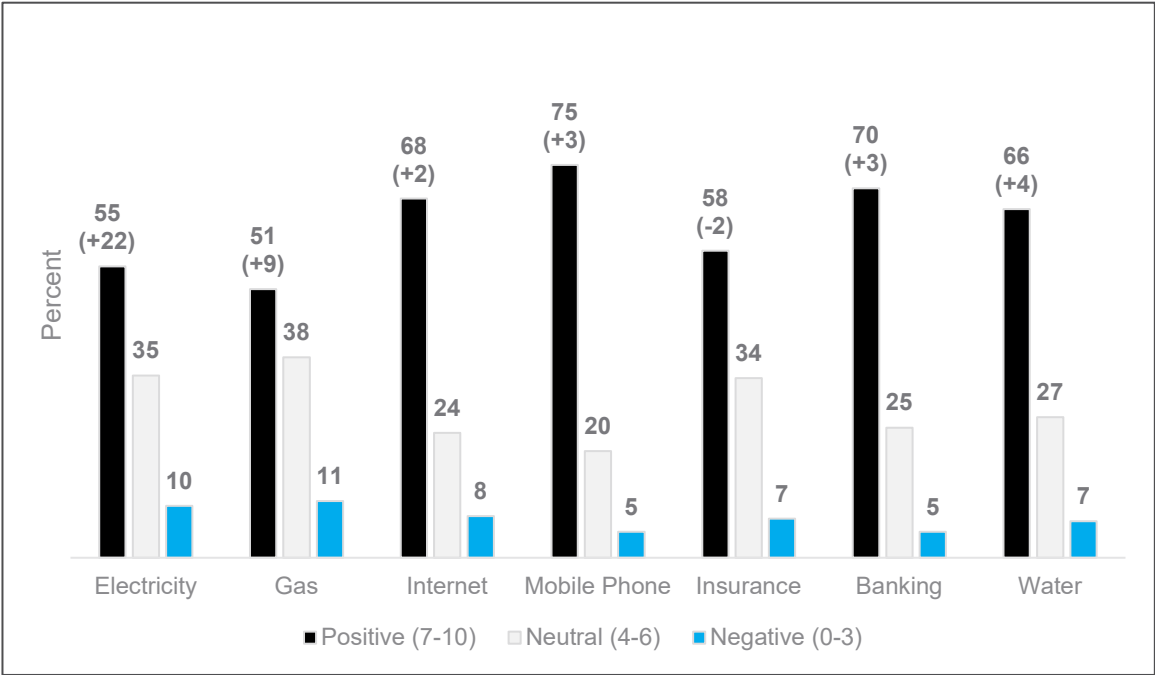
Satisfaction

## Satisfaction with utilities and services

Satisfaction with electricity and gas services narrowed the gap to other utilities and services in terms of value for money but continue to trail.

- Satisfaction with electricity (55% satisfied, up 22%) and gas (51% satisfied, up 9%) are behind all other utilities and services in the survey.
- The ACT is the only jurisdiction where satisfaction with gas is lower than for electricity.
- The next lowest rating was given to insurance 58%.

***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? (%)***  
***0-10 scale, 0='very poor', 10='excellent'***



Base: Consumers in ACT (n=126)



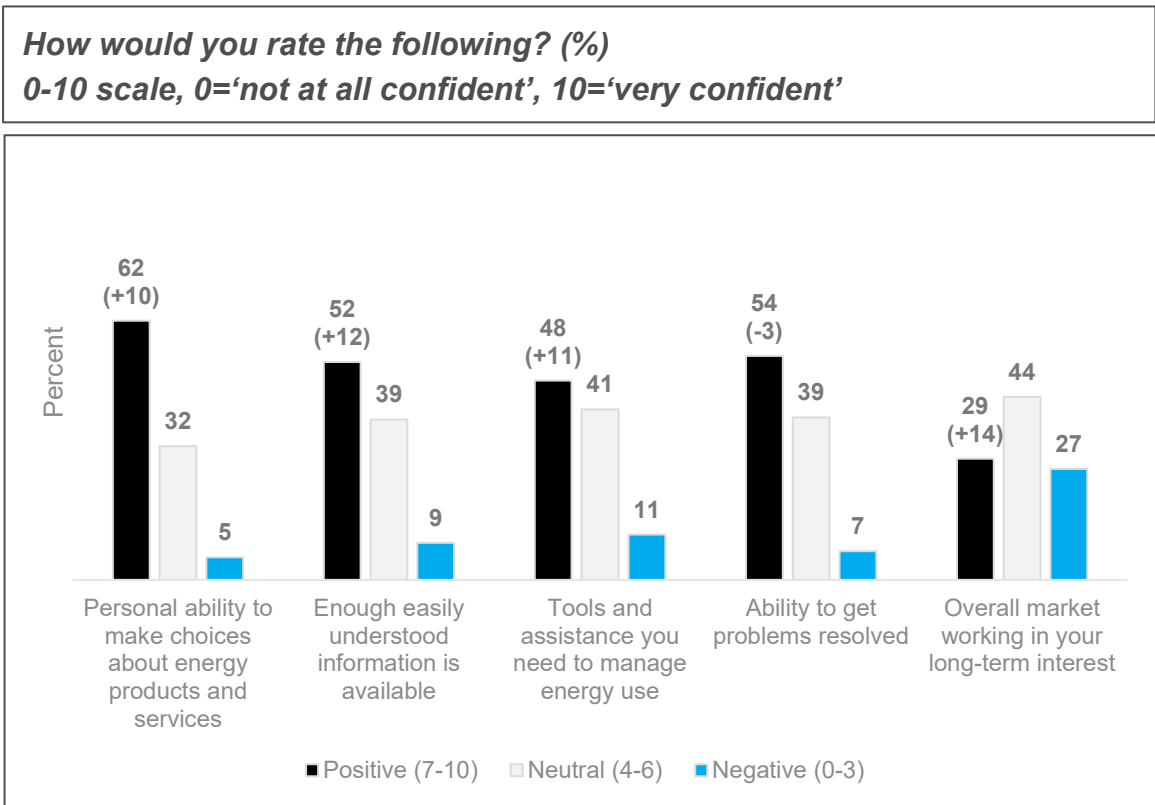


Confidence

## Confidence in information, tools and a working market

Confidence in the energy market has increased on most measures except consumers' confidence in their ability to get problems resolved.

- 29% say they are confident in the overall market working in their long-term interests (up 14%).
- 62% say they are confident in their own ability to make choices about energy products and services (up 10%).
- 54% say they are confident in their ability to get problems resolved.
- 52% are confident in the availability of easily understood information (up 12%) and 48% in the availability of tools and assistance to help consumers manage their energy use (up 11%).



Base: Consumers in ACT (n=202)



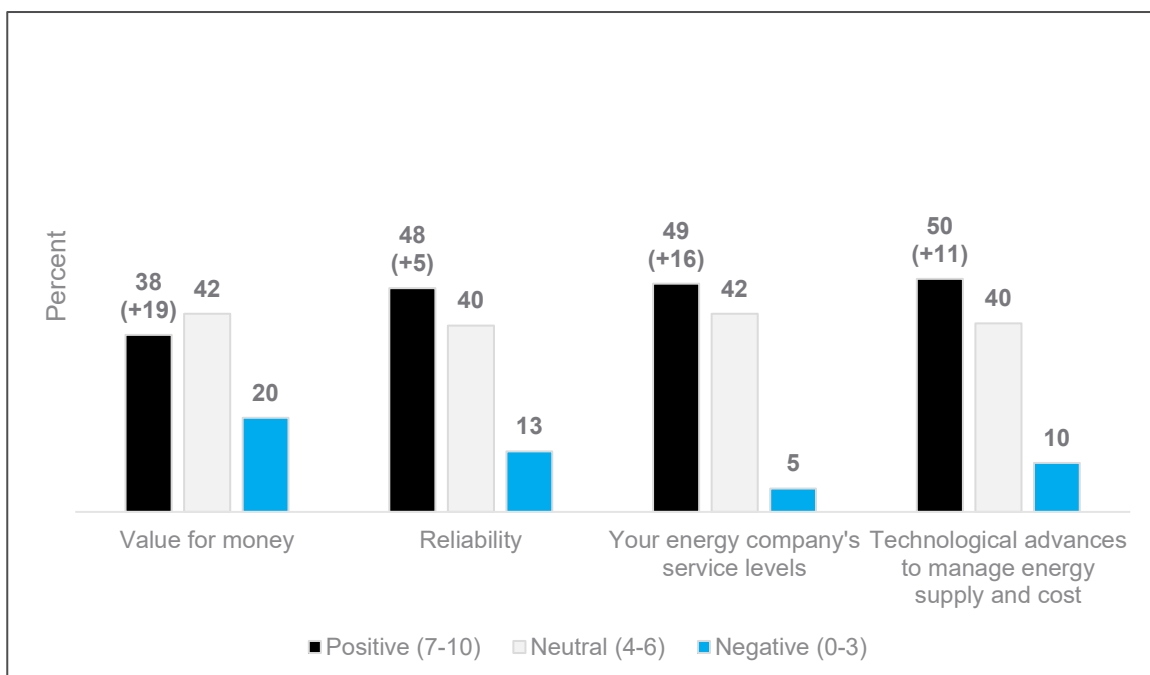
## Confidence in long term outcomes

Confidence that market outcomes will improve in the future has increased across the board, but confidence in future value for money continues to lag other measures.

- 38% say they are confident the market will provide better value for money in the future (up 19%).
- 48% are confident that the market will provide better reliability (up 5%).
- 49% are confident that service levels will improve in the next 5 years (up 16%).
- 50% are confident that the market will provide technological advances (up 11%).

**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'**



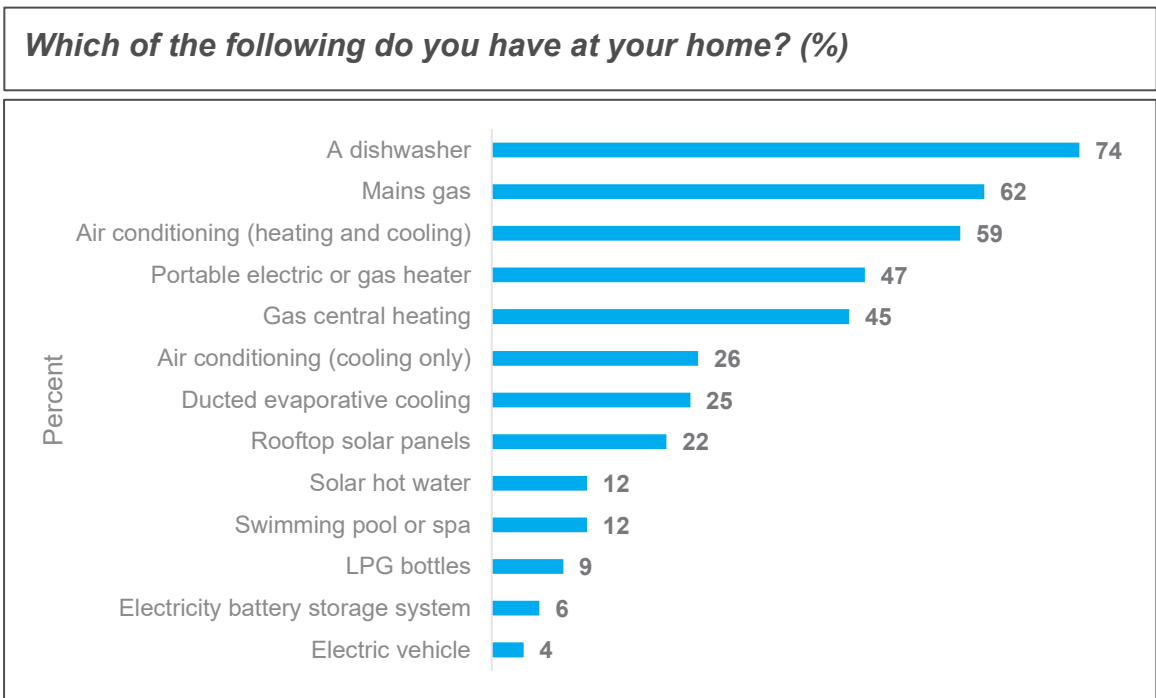
Base: Consumers in ACT (n=202)



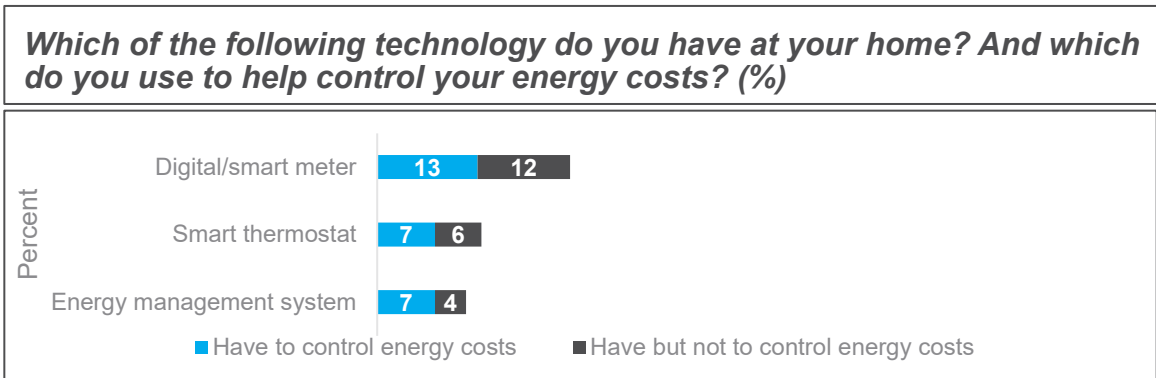
## Uptake of technologies

ACT household consumers are relatively likely to report having each of the fixed heating and cooling technologies tested in this survey and more than one in five consumers say they have solar panels.

- 59% say they have air conditioning for heating and cooling.
- 47% say they have a portable electric or gas heater.
- 45% have gas central heating.
- 22% say they have rooftop solar panels.



Base: Consumers in ACT (n=202)



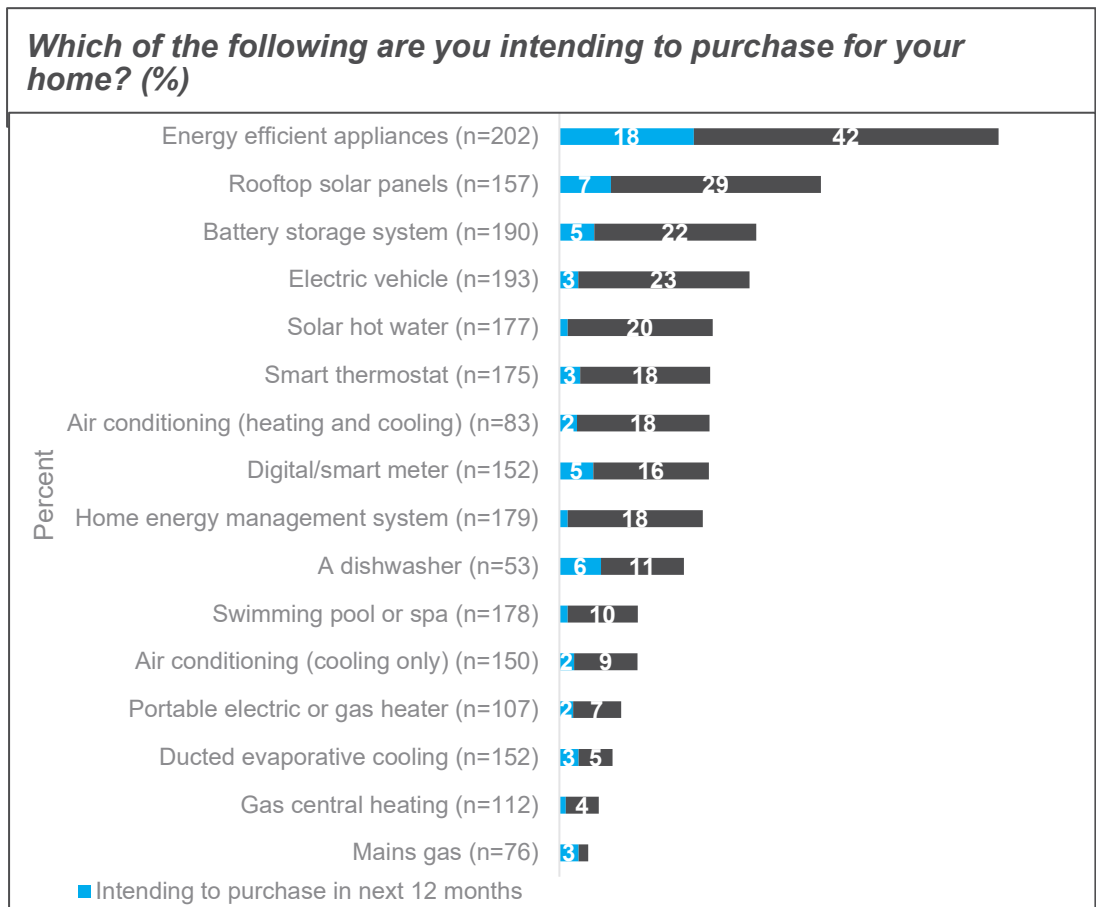
Base: Consumers in ACT (n=202)



## Future uptake of technologies

**Relatively high proportions of ACT household consumers are considering rooftop solar, air conditioning (for heating & cooling), battery storage and electric vehicles.**

- Of the households who reported having solar panels, 37% expressed interest in adding a battery storage system.
- 36% say they are considering rooftop solar panels, with 7% intending to purchase in the next year.
- 27% say they are considering a battery storage system, with 5% intending to purchase in the next year.
- 20% report that they are considering air conditioning that they would use for both cooling and heating.
- 26% say that they are considering purchasing an electric vehicle.



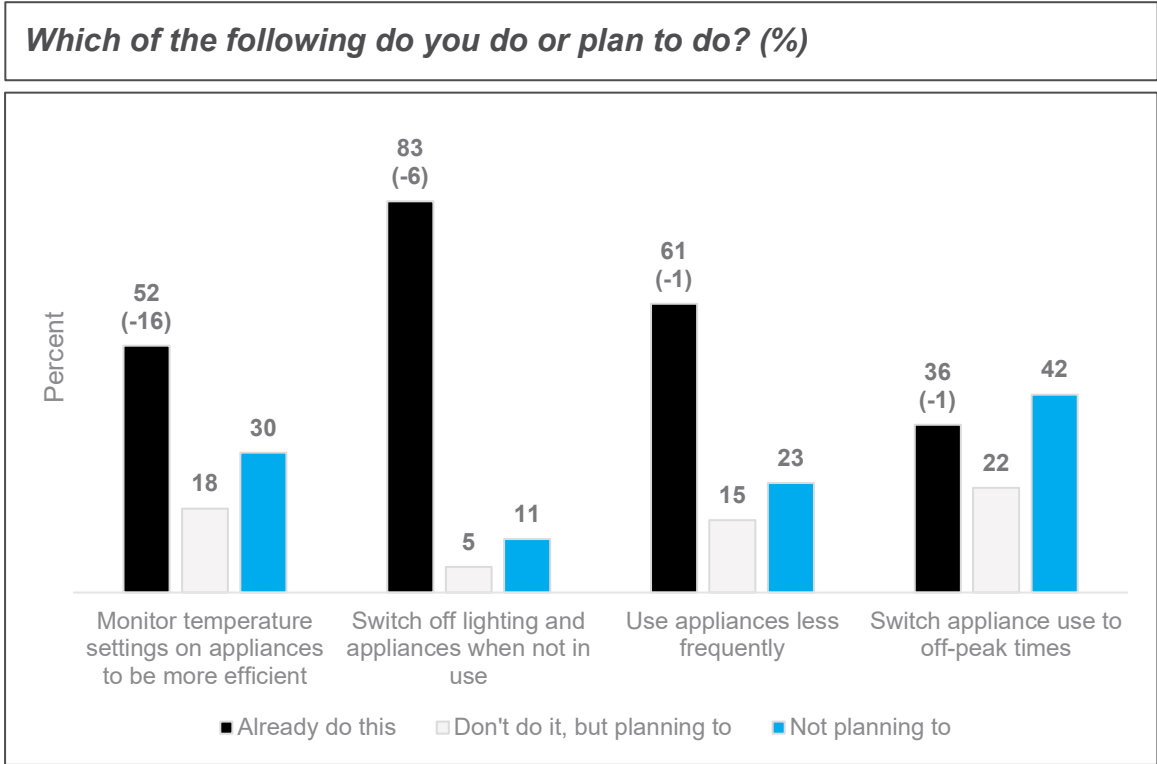
Note: Other than 'energy efficient appliances' which was asked of the entire sample, figures are the percentage of those who do not already have that technology in their home in the ACT



## Energy saving practices

**Most ACT household consumers are actively trying to manage their energy use, although there has been a reduction since the results reported in December 2018.**

- 83% say they switch off lighting and appliances when not in use (down 6%).
- 52% say they monitor temperature settings on appliances (down 16%).
- 61% say they use appliances less frequently.
- 36% say they already have switched appliance use to off-peak times, but a higher proportion say they do not plan to do so.



Base: Consumers in ACT (n=202)

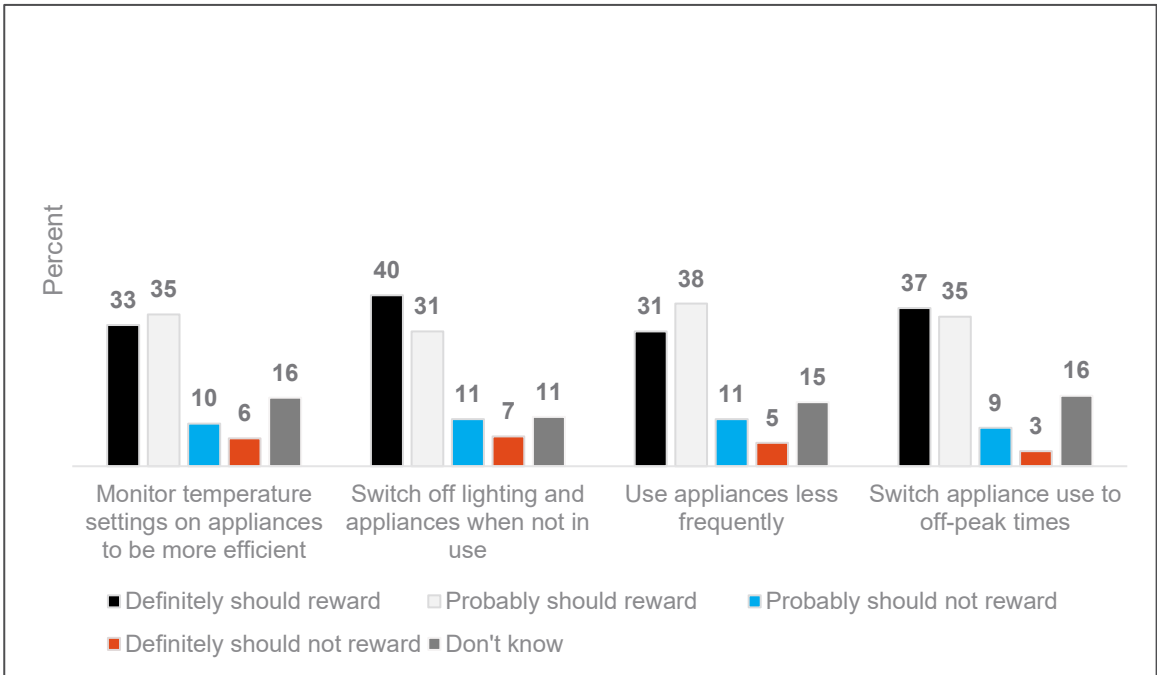


## Reward for reducing energy use

**Most ACT household consumers think customers should be rewarded for taking action to reduce their energy usage.**

- 72% think electricity companies should do more to financially reward customers who switch appliance use to off-peak times (down 1%).
- 71% think electricity companies should do more to financially reward customers who switch off lighting and appliances when not in use (up 5%).
- 69% think electricity companies should do more to financially reward customers who use appliances less frequently (up 8%).
- 68% think electricity companies should do more to financially reward customers who monitor temperature setting on appliances to be more efficient (up 4%).

***Should electricity companies do more to financially reward customers who do the following: (%)***



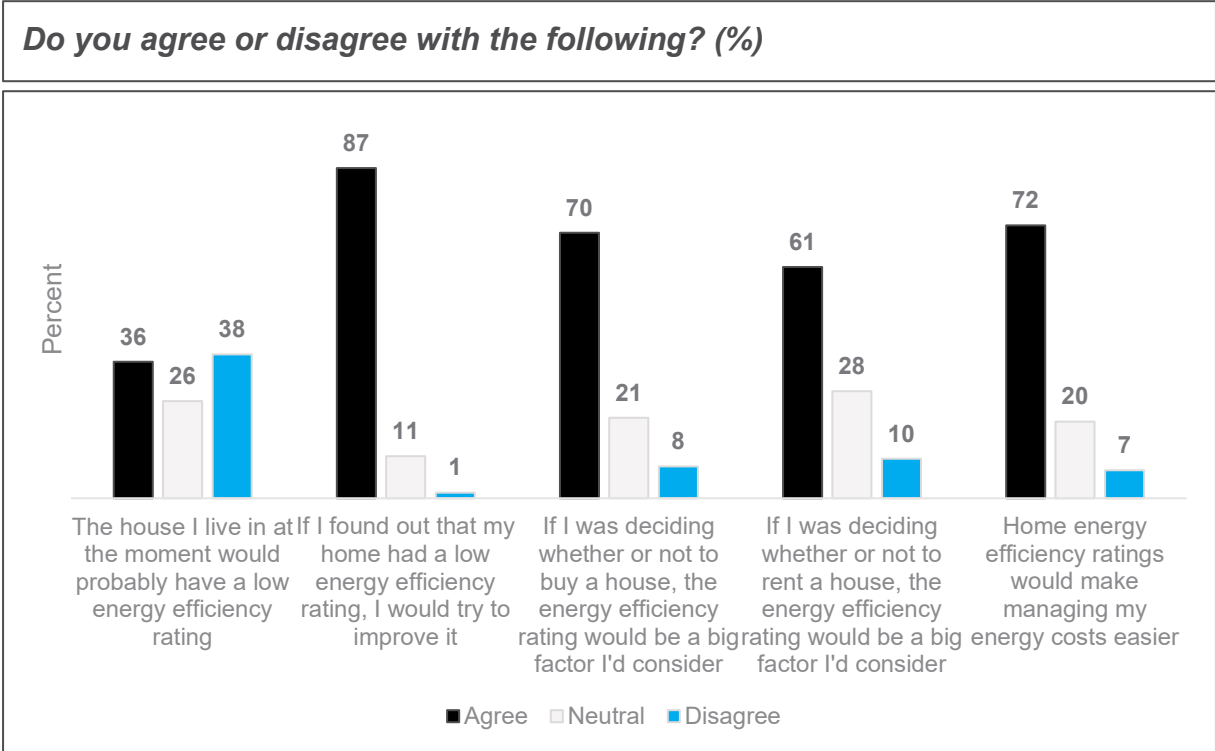
Base: Consumers in ACT (n=202)



## Housing energy efficiency

**Energy efficiency would be an important factor for most ACT consumers when deciding where to live.**

- ACT household consumers are the most likely to have a view on whether their house would have a low energy efficiency rating, with 36% saying that it would and 38% believing that it would not (higher than any of the states).
- 87% of homeowners said they would try to improve their home’s energy rating if they found out it had a low rating, the highest in any state or territory (up 2%).
- 72% said a home energy efficiency rating would make managing their energy costs easier (up 9%).
- 61% of renters said an energy rating would be a big factor they would consider when renting a house (down 4%).



Base for 'current house having a low energy rating', 'consider energy rating when purchasing a home' and 'home energy ratings would make managing my energy costs easier': Consumers in ACT (n=202)

Base for 'I would try to improve my home energy efficiency': Home-owners in ACT (n=135)

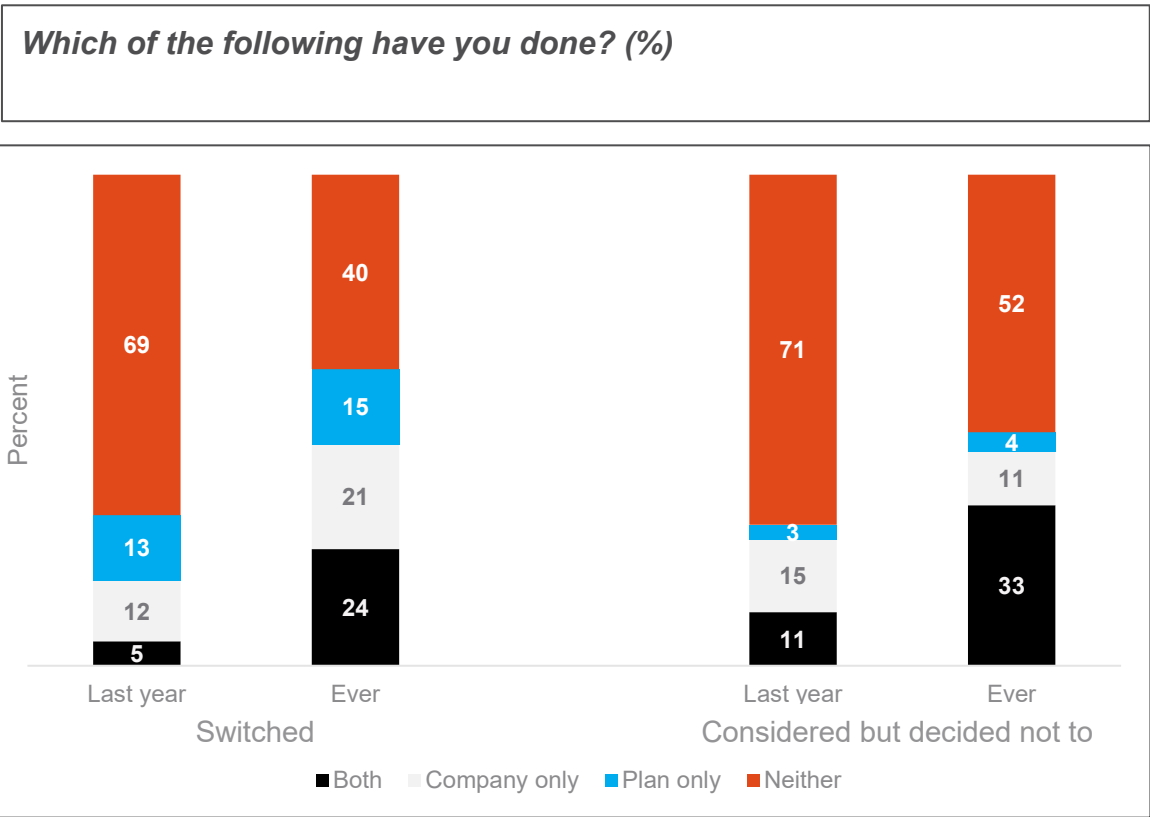
Base for 'consider energy rating when renting': Renters in ACT (n=67)



## Switching behaviour

Although many ACT household consumers report never having switched energy companies or plans, a relatively high proportion (given that fact) report either switching or considering switching in the past year.

- 40% say that they have never switched energy companies or plans.
- 30% report switching companies or plans in the past year, while 29% say that, in the past year, they have considered switching companies or plans but not done so.



Base: Consumers in ACT (n=202)





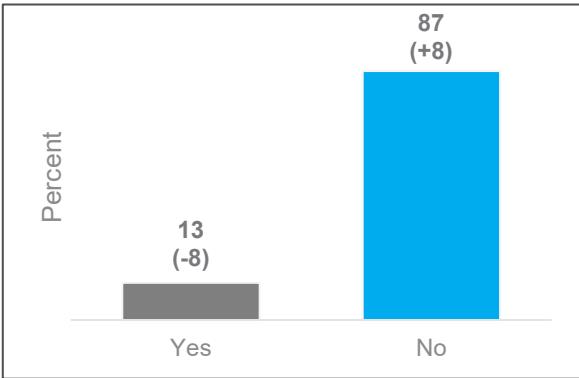
Activity

## Reasons for considering switching

Searching on a comparison website is a common practice for those looking to switch .

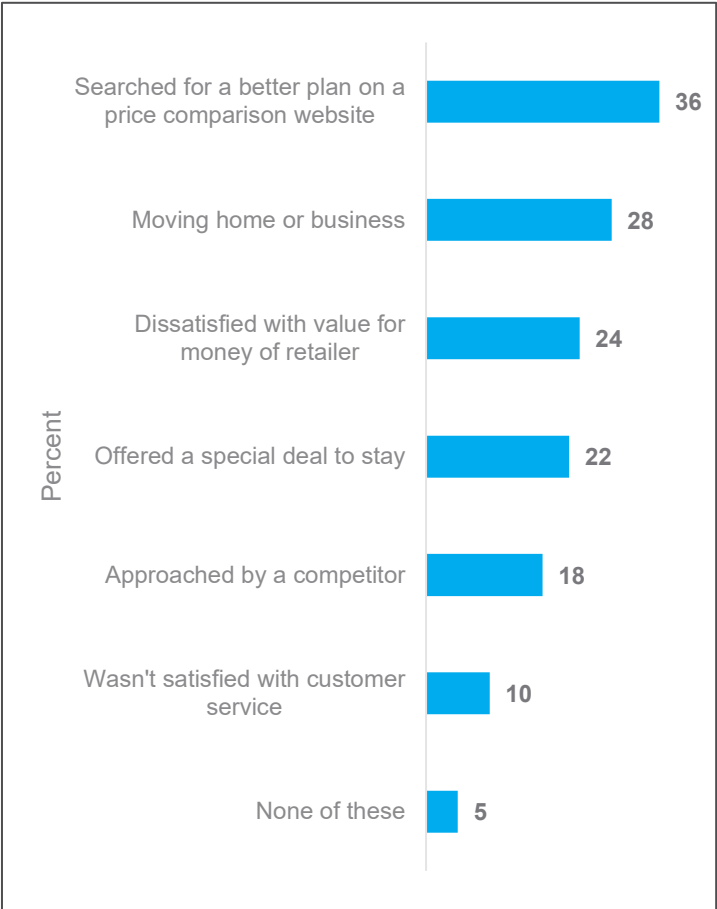
- 36% searched for a better plan on a price comparison website.
- 28% said they were moving home or business when they last thought about switching.
- 13% of ACT household consumers intend to switch companies or plans in the next year.

**Do you intend to switch energy companies or energy plans in the next year? (%)**



Base: Consumers in ACT (n=202)

**Thinking of the last time you were looking at switching energy companies, which of the following apply to you? (%)**



Base: Consumers in ACT who have switched or looked at switching in the past (n=123)

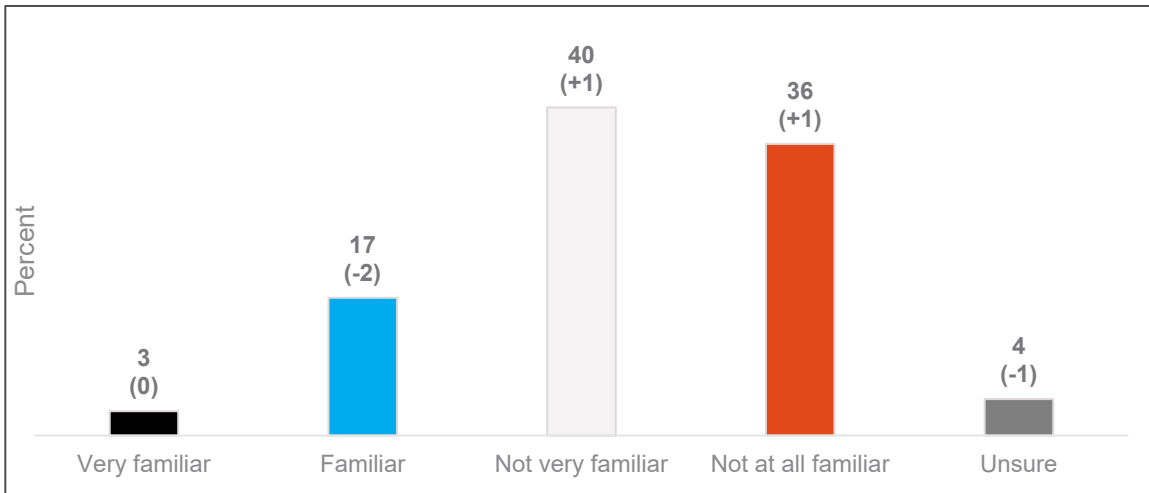


Other

## Awareness of the Energy Ombudsman

Declared awareness of the Energy Ombudsman is down in the ACT, with 20% now claiming to be familiar or very familiar.

**How familiar are you with an organisation called the Energy Ombudsman, which assists consumers with complaints about energy? (%)**



Base: Consumers in ACT (n=202)

# Western Australia





## Overall satisfaction

**Overall satisfaction with electricity and gas services amongst Western Australian household consumers has increased.**

- 78% are satisfied with their electricity and gas services (up 7%).

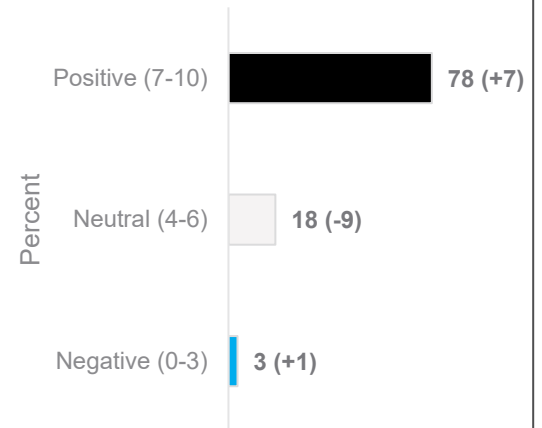
**The proportion of household consumers in Western Australia that are satisfied with the level of competition in the market is unchanged.**

- 47% say they are satisfied with competition levels.

## Satisfaction

### Overall Satisfaction

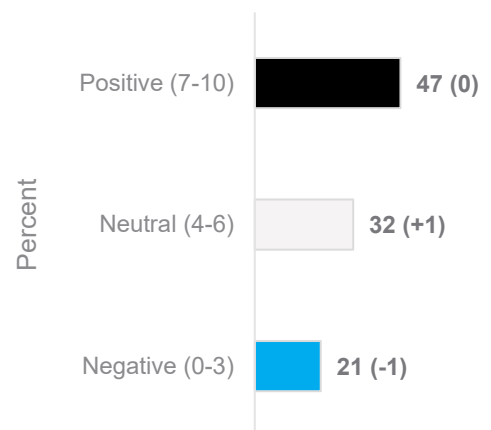
*How satisfied are you with the provision of your electricity and gas services overall in the last 6 months? (%)*



Base: Consumers in WA (n=315)

### Satisfaction with competition

*How satisfied are you with the level of competition in the energy market in your area? (%)*



Base: Consumers in WA (n=315)



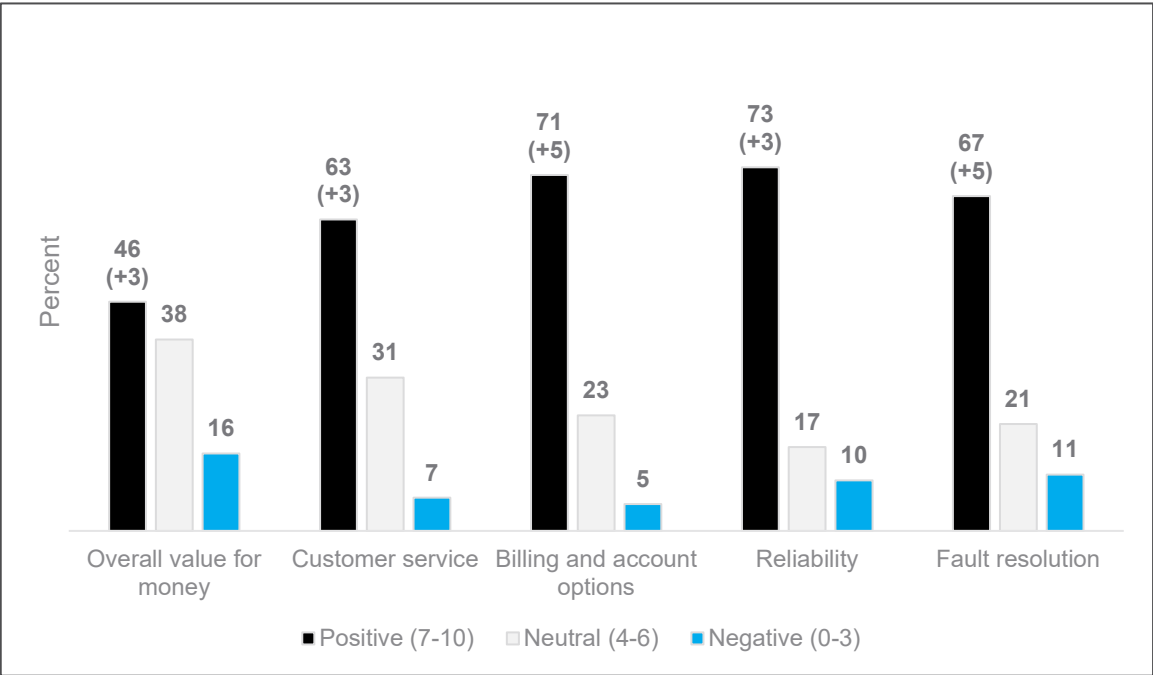
Satisfaction

## Satisfaction with electricity

Satisfaction with all electricity-related measures has increased in WA.

- 73% say they are satisfied with the reliability of their electricity supply (up 3%).
- 71% say they are satisfied with their billing and account options (up 5%).
- 67% say they are satisfied with the fault resolution provided to them (up 5%).
- 63% say they are satisfied with the customer service they receive (up 3%).
- 46% say they are satisfied with value for money outcomes for their electricity service (up 3%).

*How would you rate the [attribute]? (%)*  
*0-10 scale, 0='not at all satisfied', 10='very satisfied'*



Base: Consumers in WA with electricity supply (n=315)  
Base for fault resolution: Those in WA who rated 0 to 9 satisfaction and had a power outage (n=177)



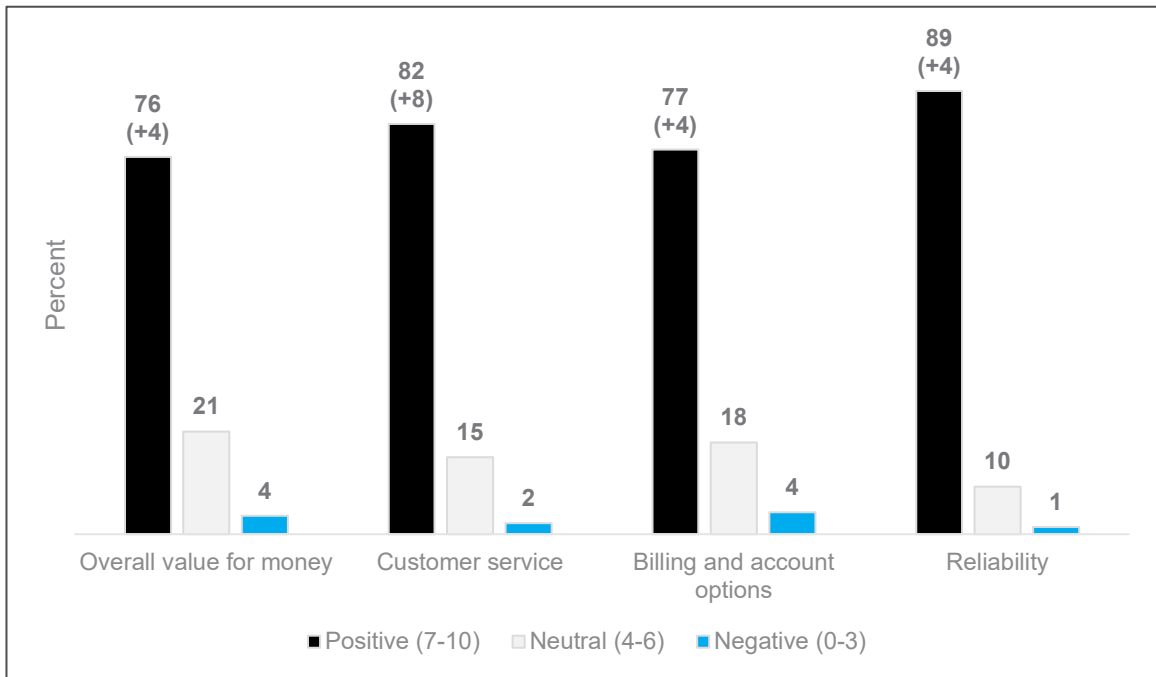
Satisfaction

### Satisfaction with gas

Satisfaction with gas services has increased for Western Australian household consumers in all areas.

- Satisfaction with reliability of gas services increased by 4% to 89%.
- Satisfaction with customer service has increased by 8% to 82%.
- Satisfaction with billing and account options has increased by 4% to 77%.
- Satisfaction with overall value for money for gas has increased by 4% to 76%.

*How would you rate the [attribute]? (%)*  
*0-10 scale, 0='not at all satisfied', 10='very satisfied'*



Base: Consumers in WA with gas supply (n=272)



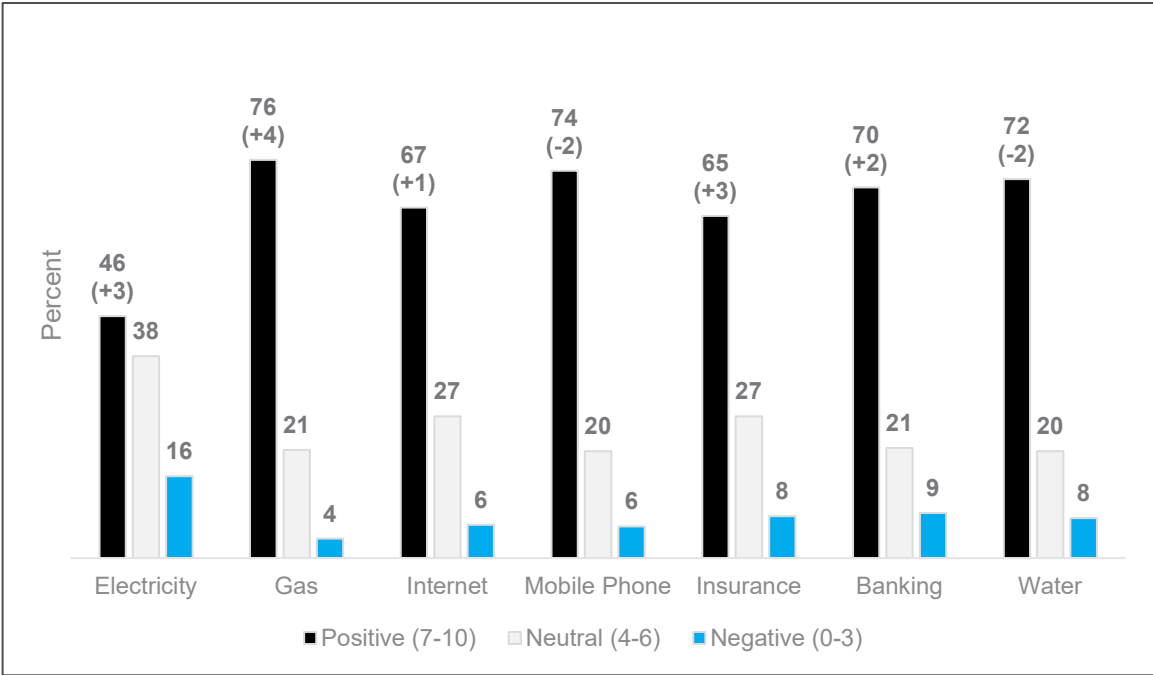
Satisfaction

## Satisfaction with utilities and services

Satisfaction with gas now leads all other utilities and services in terms of value for money, but electricity continues to trail.

- At 76%, satisfaction with gas is now ahead of all other services in the survey in terms of value for money.
- Satisfaction with electricity (46%) is behind all other utilities and services.

*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? (%)*  
0-10 scale, 0='very poor', 10='excellent'



Base: Consumers in WA (n=315)



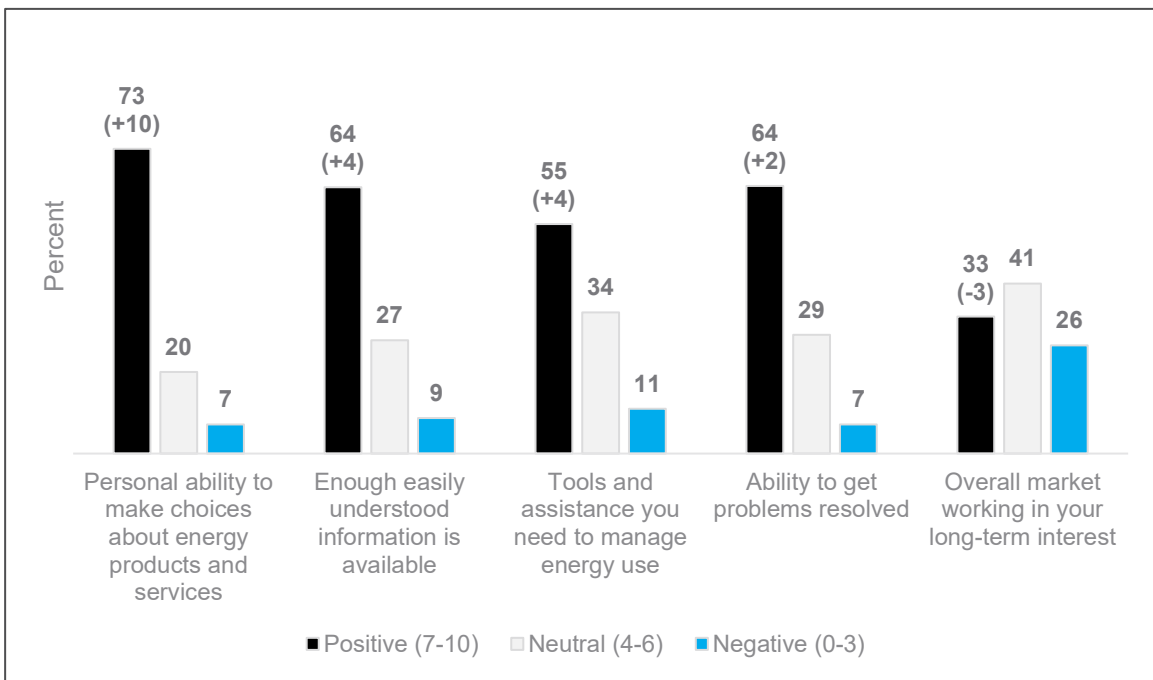
Confidence

## Confidence in information, tools and a working market

Consumers’ confidence in the information and tools available to them increased in this survey, but confidence that the overall market is working in consumers’ interest remained low.

- 73% are confident in their own ability to make choices about energy products, up 10%.
- 64% say there is enough easily understood information available but only 55% say there are enough tools to manage their energy usage.
- 64% are confident in their ability to get problems resolved.
- Consumers’ confidence that the market is working in their long-term interest remains low at 33%.

**How would you rate the following?  
0-10 scale, 0=‘not at all confident’, 10=‘very confident’**



Base: Consumers in WA (n=315)



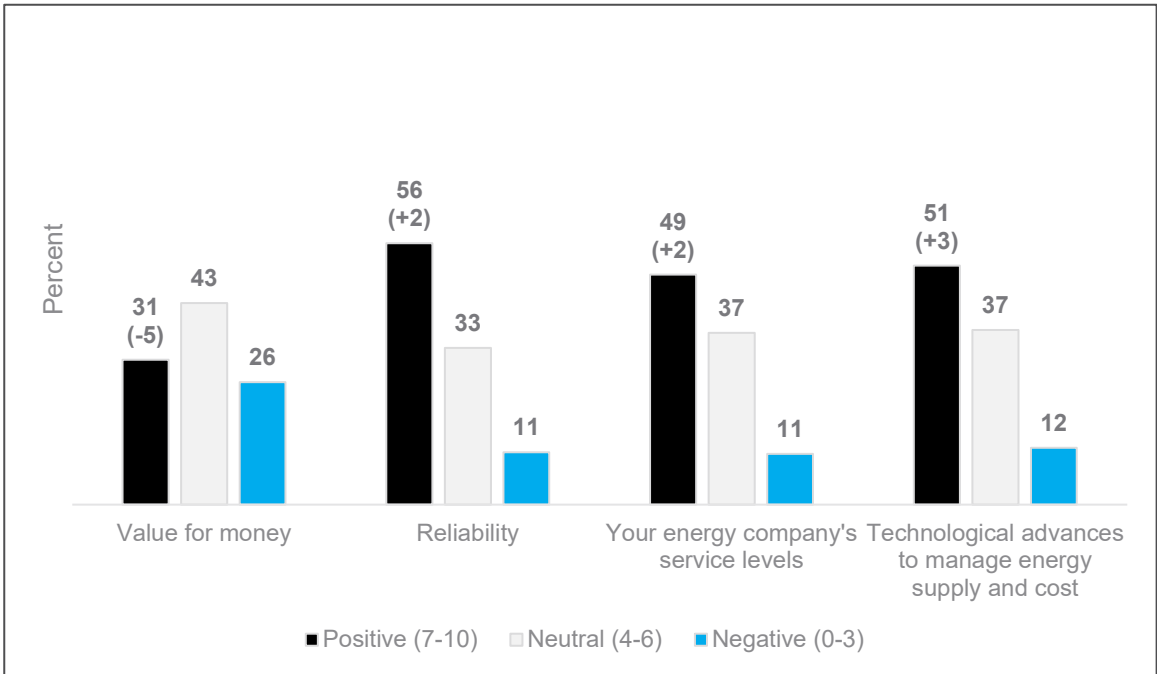


## Confidence in long term outcomes

**Confidence in the market providing better long-term outcomes in the future has increased across most measures, but confidence in future value for money continues to lag other measures.**

- 56% said they were confident the market would provide greater reliability in the future.
- 51% said they are confident that technological advances will improve energy management in terms of cost and supply.
- 49% are confident that the market will provide better service levels.
- Consumers' confidence that the market will deliver better overall value for money in the future continues to be low at 31%, down 5%.

***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'***



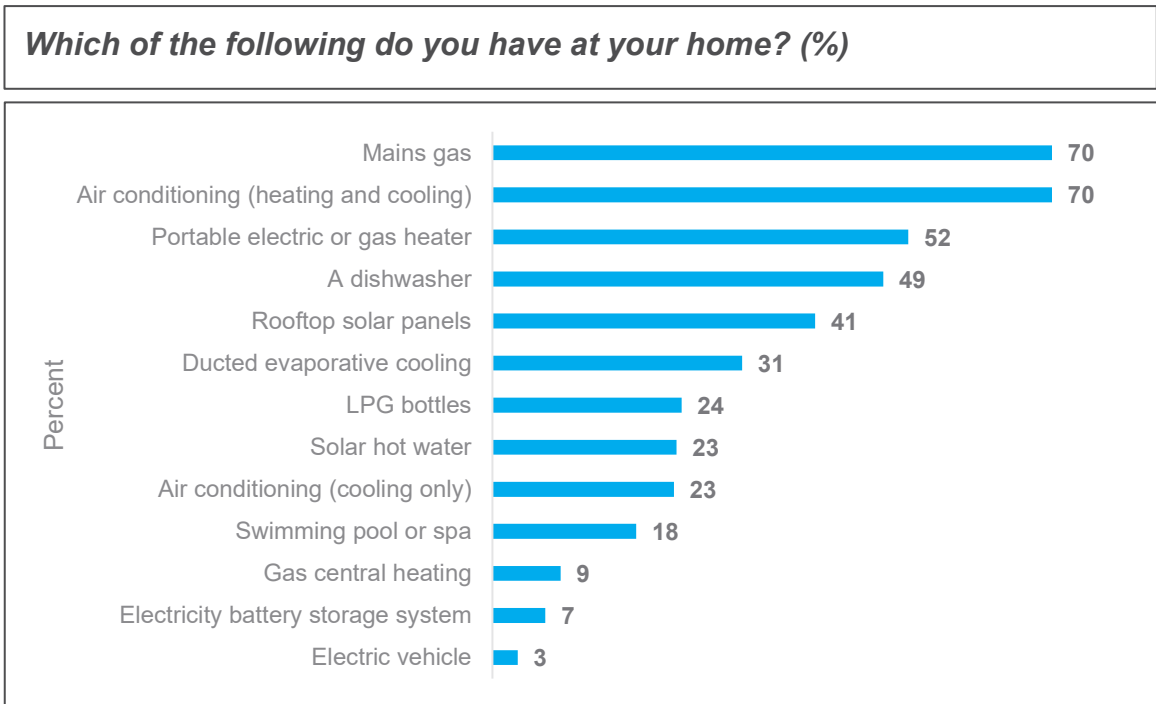
Base: Consumers in WA (n=315)



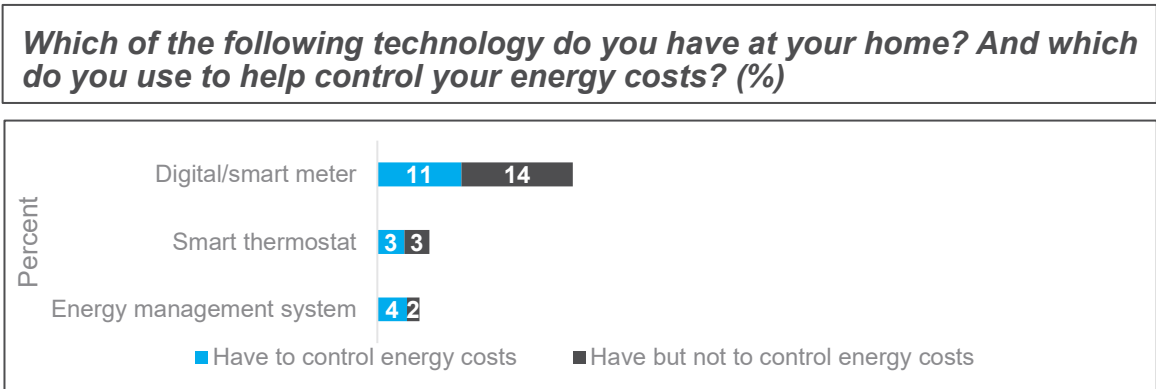
## Uptake of technologies

Western Australian household consumers in this survey are the most likely to have solar hot water, and behind only New South Wales for portable heaters. A very high proportion report having rooftop solar panels.

- 52% say they have a portable electric or gas heater.
- 41% say they have rooftop solar panels.
- 23% say they have solar hot water.



Base: Consumers in WA (n=315)



Base: Consumers in WA (n=315)

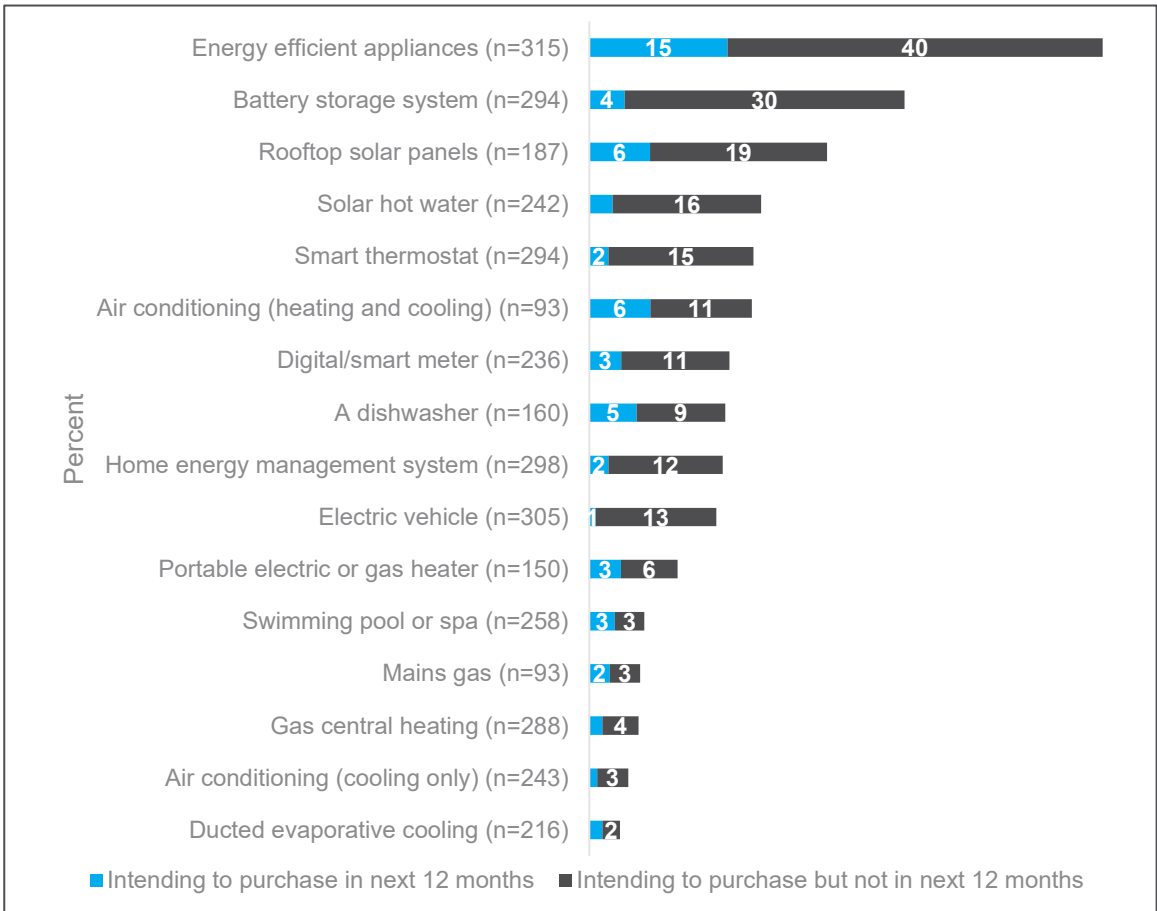


## Future uptake of technologies

**Western Australian household consumers are around the national average for considering each of the technologies tested in this survey.**

- Of the households who reported having solar panels, 58% expressed interest in adding a battery storage system.
- 25% say they are considering rooftop solar panels, with 6% intending to purchase in the next year.
- 34% say they are considering a battery storage system, with 4% intending to purchase in the next year.
- 17% report that they are considering air conditioning that they would use for both cooling and heating.

***Which of the following are you intending to purchase for your home? (%)***



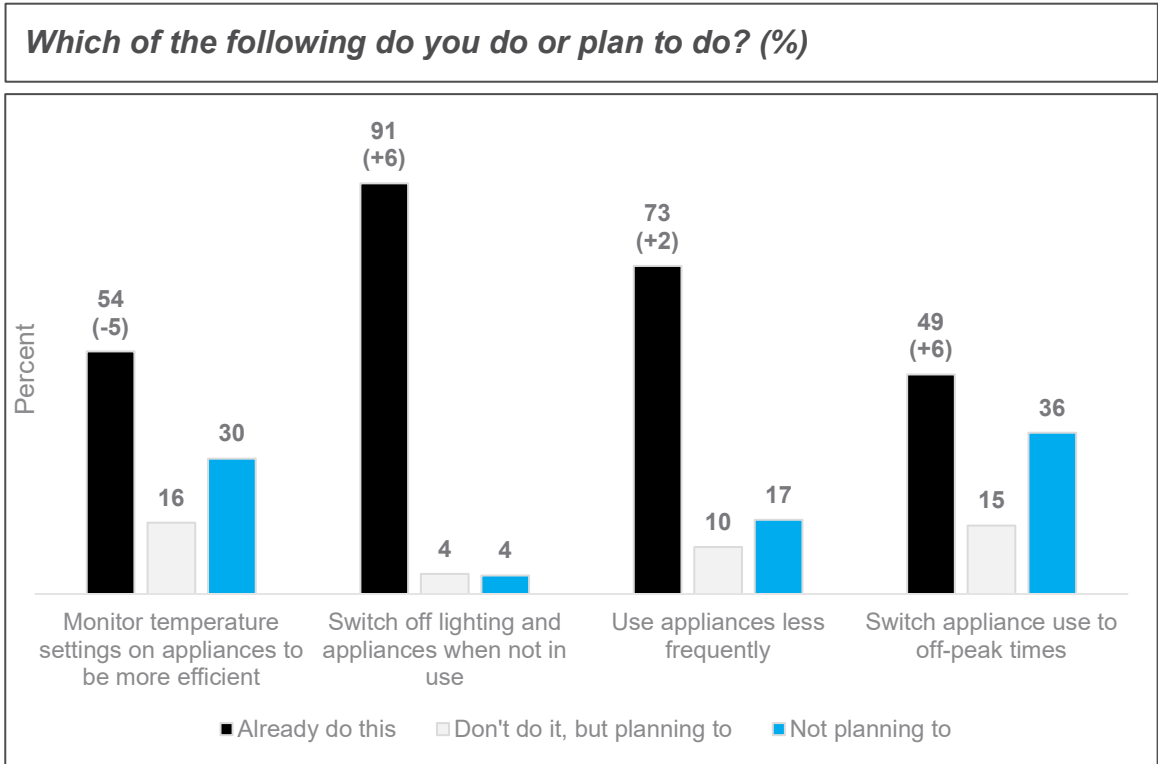
Note: Other than 'energy efficient appliances' which was asked of the entire sample, figures are the percentage of those who do not already have that technology in their home in WA Page 155 of 178



## Energy saving practices

The proportion of Western Australian household consumers saying that they switch off lighting and appliances when not in use is up, but the proportion saying that they monitor temperature settings on appliances is down.

- 91% of Western Australian household consumers say they switch off lighting and appliances when not in use (up 6%).
- 73% say they use appliances less frequently.
- 54% report that they monitor temperature settings on appliances to be more efficient (down 5%).
- 49% say they already switch appliance use to off-peak times (up 6%)



Base: Consumers in WA (n=315)

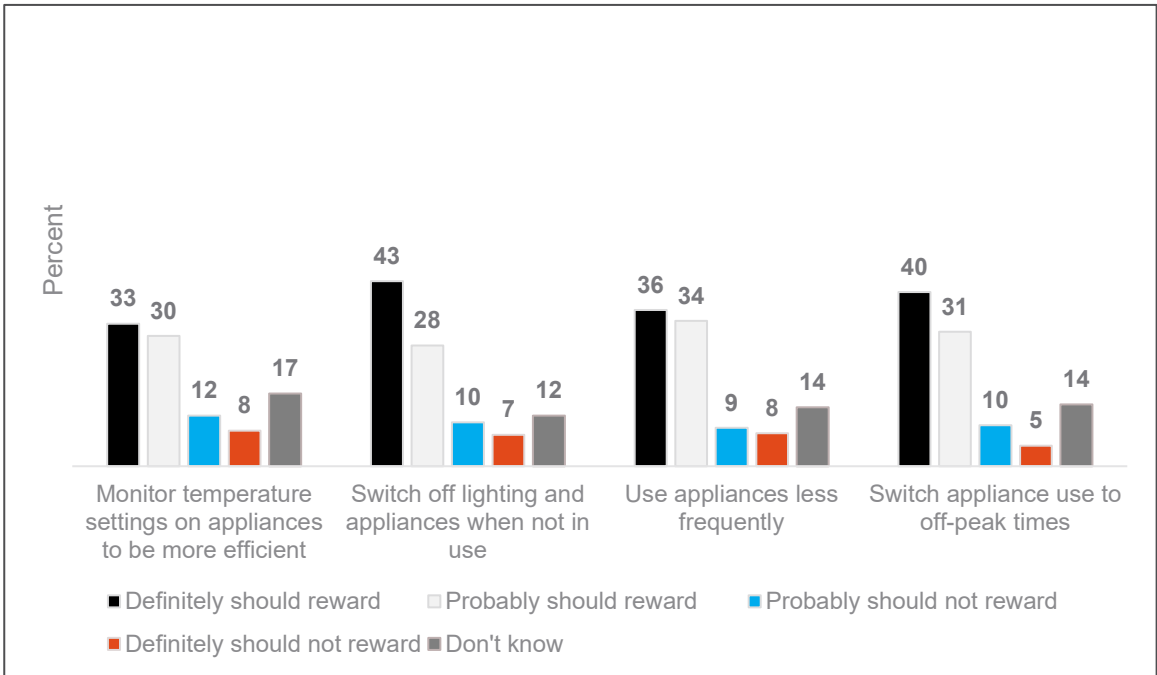


## Reward for reducing energy use

**Most Western Australian household consumers think customers should be rewarded for taking action to reduce their energy usage.**

- 71% think electricity companies should do more to financially reward customers who switch appliance use to off-peak times (up 2%).
- 71% think electricity companies should do more to financially reward customers who switch off lighting and appliances when not in use (up 8%).
- 70% think electricity companies should do more to financially reward customers who use appliances less frequently (up 4%).
- 63% think electricity companies should do more to financially reward customers who monitor temperature setting on appliances to be more efficient (up 2%).

***Should electricity companies do more to financially reward customers who do the following: (%)***



Base: Consumers in WA (n=315)

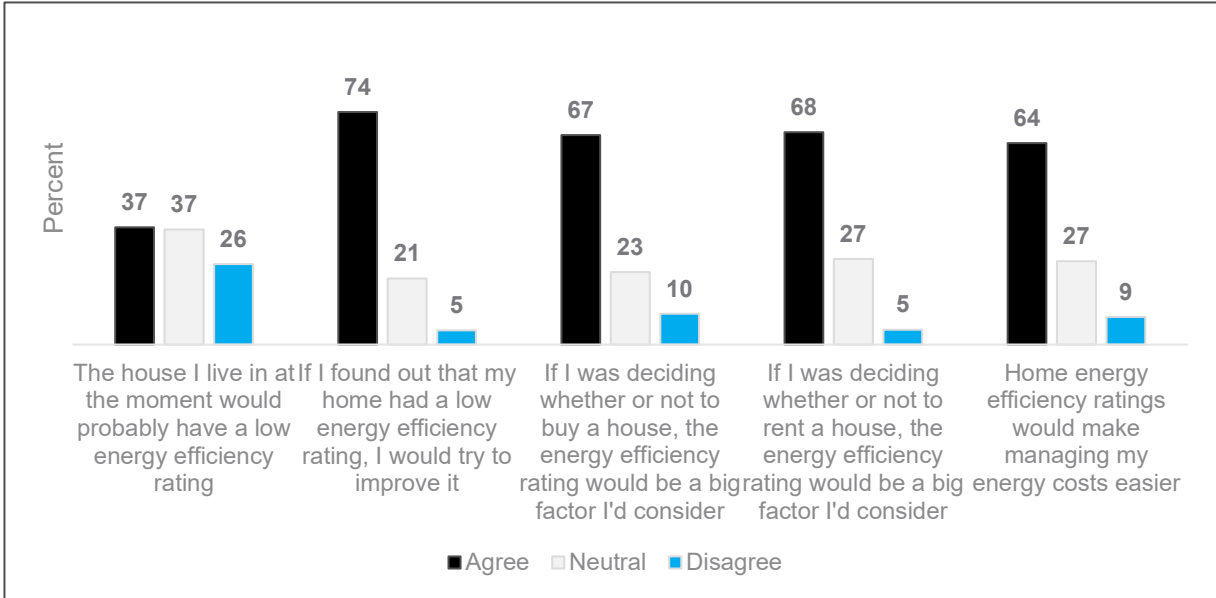


## Housing energy efficiency

**Most Western Australian consumers are interested in the energy efficiency of their home, but they do not generally believe their home is energy efficient.**

- 37% think that the home they live in at the moment would probably have a low energy efficiency rating, while 26% believe that it would not.
- 74% said they would try to improve their home's energy efficiency rating if they found out it had a low rating (up 12%).
- 68% of renters said that the energy efficiency rating would be a big factor they would consider when renting a house (up 2%).
- 67% said an energy efficiency rating would be a big factor they would consider when buying a house (up 10%).
- 64% said a home energy efficiency rating would make managing their energy costs easier (up 9%).

**Do you agree or disagree with the following? (%)**



Base for 'current house having a low energy rating', 'consider energy rating when purchasing a home' and 'home energy ratings would make managing my energy costs easier': Consumers in WA (n=315)

Base for 'I would try to improve my home energy efficiency': Home-owners in WA (n=222)

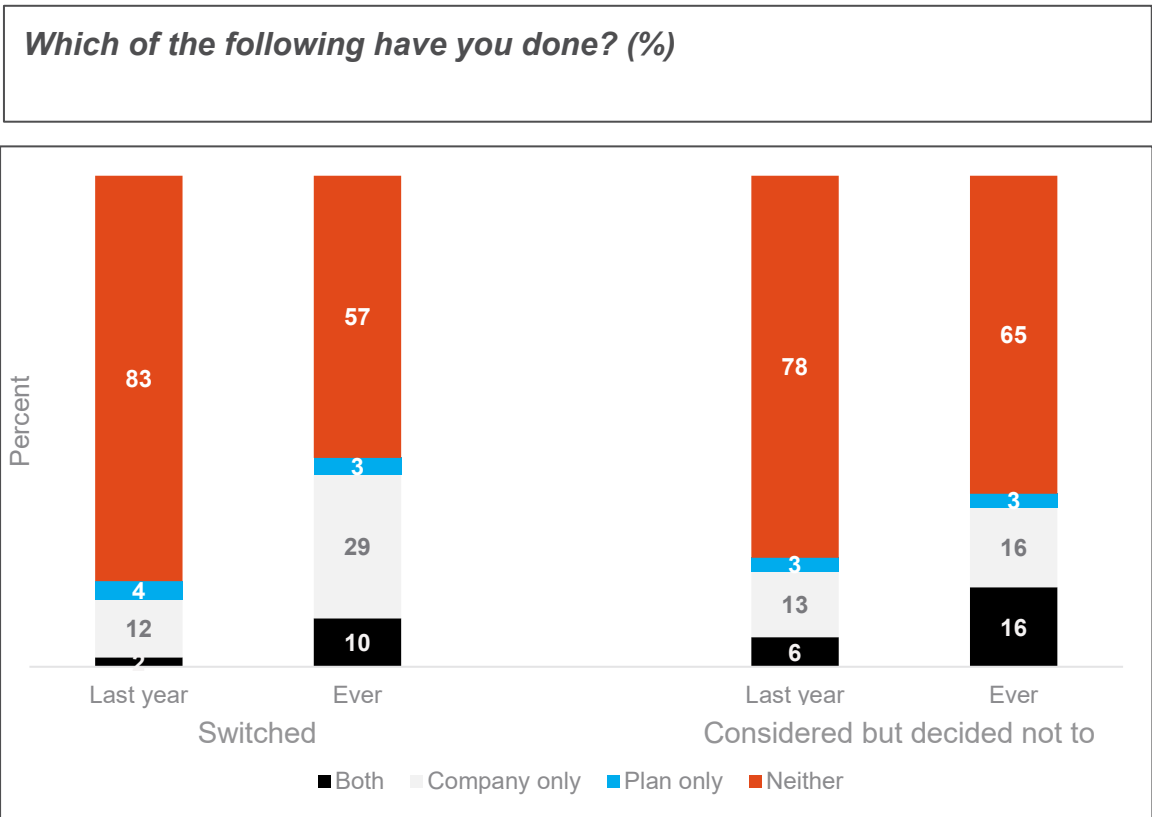
Base for 'consider energy rating when renting': Renters in WA (n=84)



## Switching behaviour

Few Western Australian household consumers report switching or considering switching energy companies or plans in the past year.

- 18% say they have switched energy companies or plans in the past year.
- 57% say they have never switched energy companies or plans.
- 22% say they have considered switching energy companies or plans but decided not to.



Base: Consumers in WA (n=315)



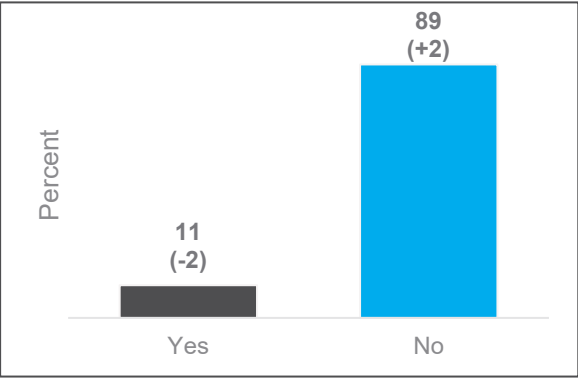
Activity

## Reasons for considering switching

**Being approached by a competitor is the largest factor when considering switching among Western Australian consumers.**

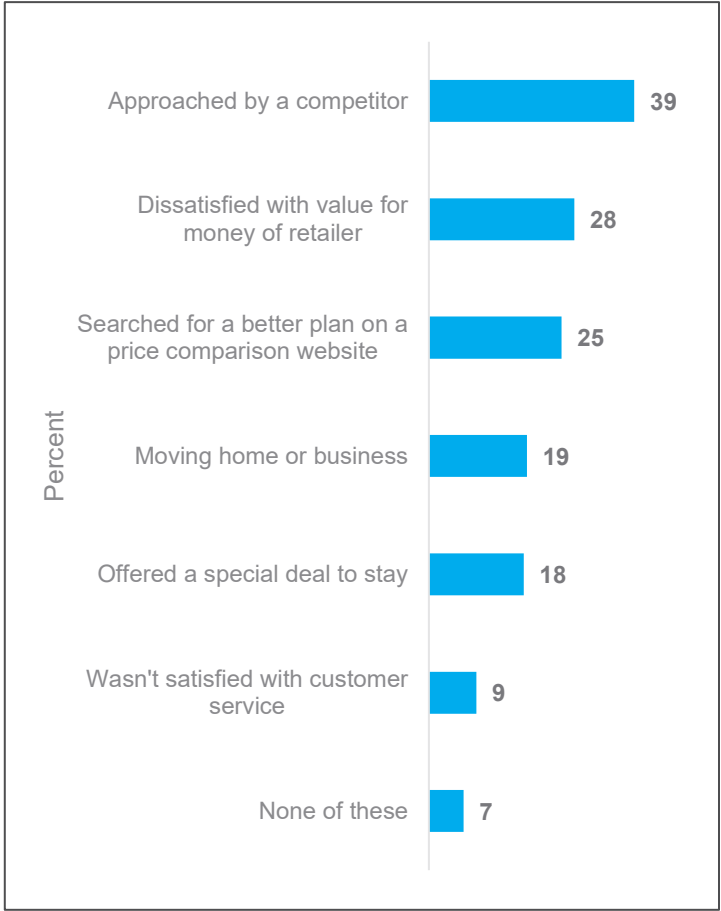
- 39% of those who have looked at switching said they were approached by a competitor.
- 28% said they were dissatisfied with the value for money of their retailer.
- 11% plan to switch energy companies or plans in the next 12 months.

***Do you intend to switch energy companies or energy plans in the next year? (%)***



Base: Consumers in WA (n=315)

***Thinking of the last time you were looking at switching energy companies, which of the following apply to you? (%)***



Base: Consumers in WA who have switched or looked at switching in the past (n=165)



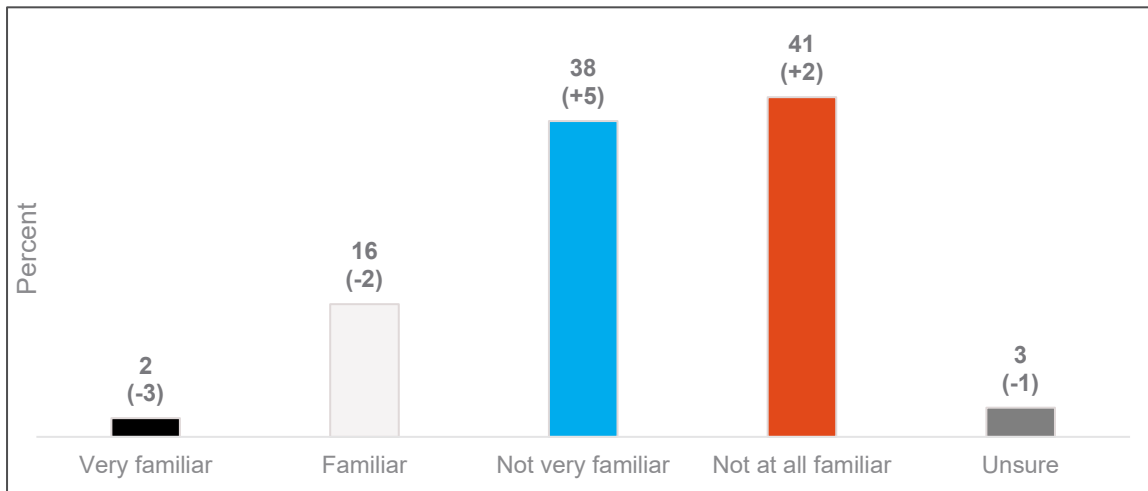


Other

## Awareness of the Energy Ombudsman

18% of household consumers in WA say they are familiar with the Energy Ombudsman (down 5%).

*How familiar are you with an organisation called the Energy Ombudsman, which assists consumers with complaints about energy? (%)*



Base: Consumers in WA (n=315)

CONFIDENTIAL

# Energy Consumers Australia

Energy Consumer Sentiment  
Survey

December 2019

QUESTIONNAIRE

# Appendix A: Survey

## SECTION 1: SCREENER

### ASK ALL

S1a Which of the following best describes your employment status?

#### COMPULSORY. SINGLE RESPONSE

1. Self employed / have my own business
2. In full time employment (30 hrs or more paid employment a week)
3. In part time employment (under 30 hrs paid employment a week)
4. Home duties
5. Retired
6. Unemployed
7. Student attending school / college / university
8. I would rather not say [TERMINATE]

### ASK ALL

S1 Which of the following best describes you?

#### COMPULSORY. SINGLE RESPONSE

1. I am the main decision maker in my household in relation to choosing energy products and services
2. I am a joint decision maker in my household in relation to choosing energy products and services
3. I have no role in decision making in my household in relation to choosing energy products and services

**TERMINATE IF S1a=4,5,6 or 7 AND S1=3 (Participant is home duties/retired/unemployed or a student AND has no role in household energy decision making)**

**AFTER REACHING N=500 FOR BUSINESS QUOTA, TERMINATE IF S1a=1,2,3 AND S1=3 (Participant is employed (Self/Full-time/Part-time) AND has no role in household energy decisions)**

**ASK IF S1a=1,2,3 (Participate is employed)**

**SKIP S2 IF BUSINESS QUOTA REACHES N=500**

S2 Which of the following best describes you?

#### COMPULSORY. SINGLE RESPONSE

1. I am the main decision maker in my business in relation to choosing energy products and services
2. I am a joint decision maker in my business in relation to choosing energy products and services
3. I have no role in decision making in my business in relation to choosing energy products and services

**TERMINATE IF S1=3 AND S2=3 (Participant has no role in household or business energy decisions)**

### ASK ALL

S3 Are you...?

#### COMPULSORY. SINGLE RESPONSE

1. Male
2. Female

**ASK IF S1=1,2 (Main/joint energy decision maker in household)**

S4 How old are you?

#### COMPULSORY. SINGLE RESPONSE

1. Under 18 [TERMINATE]
2. 18-24
3. 25-34
4. 35-44
5. 45-54
6. 55-64
7. 65-74
8. 75+
9. Prefer not to answer

**TERMINATE IF S4=1 (Participant is under 18)**

### ASK ALL

S5a What is your household's postcode?

**COMPULSORY. OPEN-ENDED RESPONSE. LIMIT TO VALID RANGES**



**dS5/Location/Region. Hidden questions to record the counts per state for Location quota purpose**

**ASK ONLY IF S2=1,2 (Participant has role in business energy decisions)**

**SKIP S6 IF BUSINESS QUOTA REACHES N=500**

S6 How many people are employed in your business?

**COMPULSORY. SINGLE RESPONSE**

1. Less than 20
2. 20-99
3. 100-199
4. 200+

**TERMINATE IF S1a=1,2,3 AND S1=3 AND S6=4 (Participant is employed, has no role in household energy decisions and has a role in business energy decisions for a company with over 200 employees)**

**HIDDEN QUESTION**

**dTYPE=1 IF S1a=4,5,6,7 AND S1=1,2 (Participant is not employed and has role in household energy decisions)**

**dTYPE=1 IF S1a=1,2,3 AND S1=1,2 AND S2=3 (Participant is employed, has a role in household energy decisions and has no role in business energy decisions)**

**dTYPE=1 IF S1a=1,2,3 AND S1=1,2 AND S6=4 (Participant is employed, has a role in household energy decisions and has a role in business energy decisions for a company with more than 200 employees)**

**dTYPE=2 IF S1a=1,2,3 AND S1=1,2 AND S6=1,2,3 (Participant has role in household and business energy decisions for company with <200 employees) (FILL QUOTA TO N=500, THEN RECYCLE TO CONSUMER SAMPLE)**

**dTYPE=2 IF S1a=1,2,3 AND S1=3 AND S6=1,2,3 (Participant has role in business energy decisions for company with <200 employees, but no role in household energy decisions) (FILL QUOTA TO N=500, THEN TERMINATE)**

dType Record a respondent belongs to Business or consumer sample

**COMPULSORY. SINGLE RESPONSE**

1. Consumer
2. Business **(FILL QUOTA TO N=500)**

**[END OF SCREENER]**

## SECTION 2: CURRENT USAGE

**ASK IF dTYPE=2 (Business sample)**

U1 Does your business operate primarily from:

**COMPULSORY. SINGLE RESPONSE**

1. Your home **[Go to U2]**
2. Another fixed location **[Go to U3]**
3. Mobile locations (e.g. tradespeople working at other people's homes) **[Go to U2]**

**ASK IF dTYPE=1 OR (dTYPE=2 AND U1=1,3) (Consumer sample OR Business sample and working from home/Mobile location)**

U2 Which of the following do you have at your home?

1. Yes
2. No

**COMPULSORY. SINGLE RESPONSE. CAROUSEL LAYOUT. RANDOMISE OPTIONS**

1. Natural gas (mains gas)
2. Liquefied Petroleum Gas (LPG in bottles – excluding those only used for BBQs or camping)
3. Electricity generated by solar panels on your roof (not solar hot water)
- 4.
5. A swimming pool or spa pool
6. Air conditioning (for cooling only)
7. Air conditioning (for cooling and heating)
8. A ducted evaporative cooling system
9. Gas central heating
10. A portable electric or gas heater
11. An electric vehicle
- 12.



13. A dishwasher

**ASK IF dTYPE=1 OR (dTYPE=2 AND U1=1,3) (Consumer sample OR Business sample working from home/Mobile location)**

U2a Which of the following do you have at your home?

1. Yes
2. No

**COMPULSORY. CAROUSEL LAYOUT. RANDOMISE ORDER**

1. An electricity battery storage system (used to store electricity from the grid or electricity generated in your home – especially solar electricity)
2. Solar hot water

**ASK IF dTYPE=1 OR (dTYPE=2 AND U1=1,3) (Consumer sample OR Business sample working from home/Mobile location)**

U4 Which of the following technology do you have in your household, and which do you use to help control your energy costs?

1. Have it and use it to control energy costs
2. Have it but do not use it to control energy costs
3. Do not have it

**COMPULSORY. CAROUSEL LAYOUT. RANDOMISE ROW OPTIONS**

1. A digital meter for your electricity supply, also known as a smart meter
2. A smart thermostat or other smart control devices (such as programmable lights, smart plugs or switches)
3. A home energy management system (a product that monitors, controls or analyses energy use in your whole home)

**ASK IF U2/7=1 AND U2/9=1 (Participant has both Air conditioning (for cooling and heating) and Gas central heating)**

U6 You mentioned before that you have both air conditioning (for cooling and heating) and gas central heating. Which of those two do you use more often to heat your home?

**COMPULSORY. SINGLE RESPONSE**

1. Air conditioning (for cooling and heating)
2. Gas central heating
3. Use both equally

**ASK ONLY IF dTYPE=2 AND U1=2 (Business sample and working from another fixed location)**

U3 Which of the following do you have at your place of business?

1. Yes
2. No

**COMPULSORY. CAROUSEL LAYOUT. RANDOMISE OPTIONS**

1. Natural gas (mains gas)
2. Liquefied Petroleum Gas (LPG in bottles – excluding those only used for BBQs or camping)
3. Electricity generated by solar panels on your roof (not solar hot water)
4. An electricity battery storage system (used to store electricity from the electricity grid or electricity generated in your home – especially solar electricity)
- 5.
6. Air conditioning (for cooling only)
7. Air conditioning (for cooling and heating)
- 8.
9. Gas central heating
19. Energy intensive production processes, plant or equipment (e.g. large refrigeration systems, irrigation pumps, industrial cooking equipment, large machines etc. – excluding vehicles)

**ASK ONLY IF dTYPE=2 AND U1=2 (Business sample and working from fixed location)**

U5 Which of the following technology do you have at your place of business, and which do you use to help control your energy costs?

1. Have it and use it to control energy costs
2. Have it but do not use it to control energy costs
3. Do not have it

**COMPULSORY. CAROUSEL LAYOUT. RANDOMISE ROW OPTIONS**

1. A digital meter for your electricity supply, also known as a smart meter
2. A smart thermostat or other smart control devices (such as programmable lights, smart



plugs or switches)

3. An energy management system (a product that monitors, controls or analyses energy use in your business premises)

**ASK IF U3/6=1 AND U3/8=1 (Participant has both Air conditioning (for cooling and heating) and Gas central heating)**

U7 You mentioned before that you have both air conditioning (for cooling and heating) and gas central heating. Which of those two do you use more often to heat your place of business?

**COMPULSORY. SINGLE RESPONSE**

1. Air conditioning (for cooling and heating)
2. Gas central heating
3. Use both equally

## SECTION 3: ELECTRICITY

**SHOW IF dTYPE=2 (Business sample)**

**INFO1**

For the following questions please respond in relation to your **business** electricity and gas accounts

**ASK ALL**

E1 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.

**COMPULSORY. SINGLE RESPONSE. 11-POINT SCALE. LABEL END POINTS ONLY "0 - Very poor", "10 - Excellent". NUMBER ALL OTHER OPTIONS**

**ASK ALL**

E2 How satisfied are you with the following?

**COMPULSORY. CAROUSEL LAYOUT. 11-POINT SCALE. LABEL END POINTS ONLY "0 - Very dissatisfied", "10 - Very satisfied". RANDOMISE ORDER**

1. The overall quality of customer service provided by your electricity company in the past 6

months

2. The billing and account options (such as the option of monthly billing, online accounts etc.) currently available to you from your electricity supplier
3. The number of times you've had loss of power, blackout or other faults with your electricity supply in the past 6 months

**ASK IF E2/3≠10 (Participant did not rate the number of times they've had a loss of power as Very satisfied)**

E3 Thinking about the power outages, blackouts or faults you've experienced in the past 6 months, how satisfied are you with the **time it took to resolve the issue?**

**COMPULSORY. SINGLE RESPONSE. 11-POINT SCALE. LABEL END POINTS ONLY "0 - Very dissatisfied", "10 - Very satisfied". INCLUDE POINT "I haven't had any faults in past 6 months". NUMBER ALL OTHER POINTS**

## SECTION 4: GAS

**ONLY ASK THIS SECTION IF U2/1=1 OR U2/2=1 OR U2/9=1 OR U3/1=1 OR U3/2=1 OR U3/9=1 (Participant has natural gas, LPG or gas central heating at their household or business). ELSE SKIP TO SECTION 5**

**SHOW IF dTYPE=2 (Business sample)**

**INFO2**

For the following questions please respond in relation to your **business** electricity and gas accounts.

**ASK IF U2/1=1 OR U2/2=1 OR U2/9=1 OR U3/1=1 OR U3/2=1 OR U3/9=1 (Participant has natural gas, LPG or gas central heating at their household or business)**

G1 Is your gas account with the same company as your electricity account?

**COMPULSORY. SINGLE RESPONSE**

1. Yes, my gas and electricity accounts are with the same company
2. No, I have a different company for my gas account
97. Don't know



**ASK IF U2/1=1 OR U2/2=1 OR U2/9=1 OR U3/1=1 OR U3/2=1 OR U3/9=1 (Participant has natural gas, LPG or gas central heating at their household or business)**

G2 How would you rate the overall value for money of the products and services provided by your gas company in the past 6 months?

**COMPULSORY. SINGLE RESPONSE. 11-POINT SCALE. LABEL END POINTS ONLY "0 - Very poor", "10 - Excellent". NUMBER ALL OTHER OPTIONS**

**ASK IF U2/1=1 OR U2/2=1 OR U2/9=1 OR U3/1=1 OR U3/2=1 OR U3/9=1 (Participant has natural gas, LPG or gas central heating at their household or business)**

G3 How satisfied are you with the following?

**COMPULSORY. SINGLE CHOICE PER ROW. 11-POINT SCALE. LABEL END POINTS ONLY "0 - Very dissatisfied", "10 - Very satisfied". RANDOMISE ORDER**

1. The overall quality of customer service provided by your gas company in the past 6 months
2. The billing and account options (such as the option of monthly billing, online accounts etc.) currently available to you from your gas supplier
3. The number of times you've had interruptions or faults with your gas supply in the past 6 months

## SECTION 5: OVERVIEW

**SHOW IF dTYPE=2 (Business sample)**

**INFO2**

For the following questions please respond in relation to your **business** electricity and gas accounts.

**ASK ALL**

O1 How satisfied are you with the following?

**COMPULSORY. SINGLE CHOICE PER ROW. 11-POINT SCALE. LABEL END POINTS ONLY "0 - Very dissatisfied", "10 - Very satisfied"**

1. The provision of your electricity and gas services overall over the last 6 months
2. 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)

**SHOW TO ALL INFO3**

The following question is about some services not related to your electricity or gas.

**SHOW IF dTYPE=2 (Business sample)**

**INFO4**

Again, please respond in relation to your **business** accounts.

**ASK ALL**

O2 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?

**COMPULSORY. SINGLE RESPONSE. CAROUSEL LAYOUT. 11-POINT SCALE. LABEL END POINTS ONLY "0 - Very poor", "10 - Excellent". NUMBER ALL OTHER POINTS. RANDOMISE ORDER**

1. Your internet service
2. Your mobile phone service
3. Your insurance services
4. Your banking services
5. Your water services

**ASK IF dTYPE=2 (Business sample)**

O3 How important are electricity and gas costs to your business?

**COMPULSORY. SINGLE RESPONSE**

1. One of your biggest overheads
2. Substantial, but not one of your biggest overheads
3. A minor expense in the scheme of things

## SECTION 6: ACTIVITY

**ASK IF dTYPE=1 OR (dTYPE=2 AND U1=1,3) (Consumer sample OR Business sample and working from home/Mobile location)**

**ONLY SHOW PRODUCT OPTIONS WHEN U2=2 OR U2a=2**

**OR U4=3 (Participant does not have the product)**

A1 Which of the following are you intending to purchase for your home?

1. Intending to purchase in the next 12 months
2. Considering, but not intending to purchase in the next 12 months
3. Not intending to purchase this

**COMPULSORY. SINGLE RESPONSE. CAROUSEL LAYOUT. RANDOMISE ORDER**

1. Natural gas (mains gas)
- 2.
3. Electricity generated by solar panels on your roof (not solar hot water)
4. An electricity battery storage system (used to store electricity from the grid or electricity generated in your home – especially solar electricity)
5. A swimming pool or spa pool
6. Air conditioning (for cooling only)
7. Air conditioning (for cooling and heating)
8. A ducted evaporative cooling system
9. Gas central heating
10. A portable electric or gas heater
11. An electric vehicle
12. Solar hot water
13. A dishwasher
14. A digital meter for your electricity supply, also known as a smart meter
15. A smart thermostat or other smart control devices (such as programmable lights, smart plugs or switches)
16. A home energy management system (a product that monitors, controls or analyses energy use in your home)
17. Appliances that are more energy efficient

**ASK IF dTYPE=2 AND U1=2 (Business sample and working from another fixed location)**

**ASK IF U3=2 OR U5=3 (Participant does not have the product)**

A2 Which of the following are you intending purchasing for your business?

1. Intend purchasing in the next 12 months
2. Considering, but not intending to purchase in the next 12 months
3. Not intending to purchase this

**COMPULSORY. SINGLE RESPONSE GRID**

1. Natural gas (mains gas)
- 2.
3. Electricity generated by solar panels on your roof (not solar hot water)
4. An electricity battery storage system (used to store electricity from the grid or electricity generated in your home – especially solar electricity)
11. Electric vehicles
18. Appliances, equipment or machinery that are more energy efficient

**ASK ALL**

**ONLY SHOW PRODUCT OPTIONS WHEN A1=1,2 OR A2=1,2 (Participant is intending to, or considering purchasing the product)**

A3 What are the main reasons you are intending to purchase or considering the following?

1. To save money
2. Becoming less dependent on mains electricity
3. To make more efficient use of energy in my home/or business
4. To protect the environment
5. Some other reason

**COMPULSORY. MULTIPLE RESPONSE. CAROUSEL LAYOUT. RANDOMISE LIST**

- 1.
- 2.
3. Electricity generated by solar panels on your roof (not solar hot water)
4. An electricity battery storage system (used to store electricity from the electricity grid or electricity generated on site – especially solar electricity)
11. An electric vehicle
12. Solar hot water
- 13.
14. A digital meter for your electricity supply, also known as a smart meter
15. A smart thermostat or other smart control devices (such as programmable lights, smart plugs or switches)
16. An energy management system (a product that monitors, controls or analyses energy use in your home or business)
17. **[SHOW IF ASK IF dTYPE=1 OR (dTYPE=2 AND U1=1,3)]** Appliances that are more energy efficient
18. **[SHOW IF dTYPE=2 AND U1=2]** Appliances or





machinery that are more energy efficient

**ASK ALL**

A9 As you may be aware, sometimes there are campaigns asking people to reduce their energy use during periods of very high demand (e.g. when everyone is using their air conditioning during very hot periods). Such campaigns are often backed by government agencies or respected community groups.

If there was such a campaign asking that people reduce their energy use during a very hot period, which of the following would you be most likely to do?

**COMPULSORY. SINGLE RESPONSE**

1. Reduce my energy use as much as I can, even if I do not receive a financial incentive
2. Reduce my energy use as much as I can, but only if I receive a financial incentive
3. Not change my energy use
4. Unsure

**ASK IF dTYPE=1 OR (dTYPE=2 AND U1=1,3) (Consumer sample OR Business sample and working from home/Mobile location)**

**ASK IF U2\_7=1 AND U2\_9=1 (Participant has both Air conditioning (for cooling and heating) and Gas central heating)**

A10a You mentioned earlier that you have both air conditioning (for cooling and heating) and gas central heating.

Which of the following best applies to you?

**COMPULSORY. SINGLE RESPONSE**

1. I am considering changing the way I heat my home, so I use air conditioning for heating more and gas central heating less
2. I am considering changing the way I heat my home, so I use air conditioning for heating less and gas central heating more
3. I am not considering changing the way I heat my home

**ASK IF dTYPE=2 AND U1=2 (Business sample and working from another fixed location)**

**ASK IF dTYPE=2 AND U3/6=1 AND U3/8=1 (Participant has both Air conditioning (for cooling and heating) and Gas central heating)**

A10b You mentioned earlier that you have both air conditioning (for cooling and heating) and gas central heating.

Which of the following best applies to you?

**COMPULSORY. SINGLE RESPONSE**

1. I am considering changing the way I heat my business, so I use air conditioning for heating more and gas central heating less
2. I am considering changing the way I heat my business, so I use air conditioning for heating less and gas central heating more
3. I am not considering changing the way I heat my business

**ASK ALL**

A4 Which of the following do you currently do or plan to do?

1. Already do this / have already done this
2. Haven't already done this, but plan to do so in the near future
3. Not currently planning to do this

**COMPULSORY. SINGLE RESPONSE. CAROUSEL LAYOUT. RANDOMISE ORDER**

1. Monitor the temperature settings on appliances or equipment to be more energy efficient, and change settings if necessary
2. Regularly switch off lighting and appliances when not in use
3. Make a conscious effort to use appliances or equipment less frequently
4. Switch the times you use appliances, hot water etc. equipment to off-peak times

**ASK ALL**

A5a Which of the following have you done in the last year?

1. Yes
2. No

**COMPULSORY. SINGLE RESPONSE. CAROUSEL**



**LAYOUT. RANDOMISE ORDER**

1. Switched energy companies
2. Switched energy plans with the same company
3. Looked at switching energy companies, but decided not to switch at that time
4. Looked at switching energy plans with the same company, but decided not to switch at that time

**ASK ALL**

**ONLY SHOW OPTIONS WHEN ALL A5a=2 (Participant did not do any of this in past year)**

A5b Which of the following have you EVER done?

1. Yes
2. No

**COMPULSORY. SINGLE RESPONSE. CAROUSEL LAYOUT. RANDOMISE ORDER**

1. Switched energy companies
2. Switched energy plans with the same company
3. Looked at switching energy companies, but decided not to switch at that time
4. Looked at switching energy plans with the same company, but decided not to switch at that time

**ASK IF A5a/1=1 OR A5a/3=1 OR A5b/1=1 OR A5b/3=1 (Participant switched, or was looking to switch energy companies)**

A6 Thinking about the last time you looked at switching energy companies, which of the following applied to you?

**COMPULSORY. MULTIPLE RESPONSE. RANDOMISE 1-6. OPTION 7 STAYS AT BOTTOM OF LIST AND IS EXCLUSIVE**

1. I was moving home or business location
2. I wasn't satisfied with the value for money of my old company
3. I was offered a special deal by my current company to get me to stay
4. I was approached by a competitor
5. I searched for a better plan on an independent price comparison website
6. I wasn't satisfied with the customer service of my old company
7. None of these

**ASK IF A5a/3=1 (Participant looked at switching energy companies, but decided not to switch at that time)**

A7b Thinking about the time when you looked at switching companies but did not end up doing so, what was the reason you didn't switch?

**COMPULSORY. OPEN-ENDED VERBATIM BOX**

**ASK ALL**

A8 Do you intend to switch energy companies or energy plans in the next year?

**COMPULSORY. SINGLE RESPONSE**

1. No
2. Yes – I intend to do so in the next year

## SECTION 7: CONFIDENCE

**SHOW IF dTYPE=2 (Business sample)**

**INFO2**

For the following questions please respond in relation to your business electricity and gas accounts.

**ASK ALL**

C1 How confident do you feel in the following...?

**COMPULSORY. SINGLE RESPONSE. CAROUSEL LAYOUT. 11-POINT SCALE. LABEL END POINTS ONLY "0 - Not at all confident", "10 - Very confident"**

1. Your ability to make choices about energy products and services, such as which plan or supplier to choose
2. 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
3. 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.
4. Your ability to get a problem with your energy services resolved through your energy company or a third party



**ASK ALL**

C2 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.

**COMPULSORY. SINGLE RESPONSE. 11-POINT SCALE. LABEL END POINTS ONLY "0 - Not at all confident", "10 - Very confident"**

**ASK ALL**

C3 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...?

**COMPULSORY. SINGLE RESPONSE. CAROUSEL LAYOUT. 11-POINT SCALE. LABEL END POINTS ONLY "0 - Not at all confident", "10 - Very confident". NUMBER ALL OTHER POINTS. RANDOMISE ORDER**

1. Value for money
2. Reliability (blackouts and restoration of supply) of power supply
3. Your energy company's customer service levels
4. Technological advances to manage your energy supply and costs

**ASK ALL**

C7 Should electricity companies do more to financially reward customers who do the following...?

1. Companies definitely should do more to reward this
2. Companies probably should do more to reward this
3. Companies probably should not do more to reward this
4. Companies definitely should not do more to reward this
5. Unsure

**COMPULSORY. SINGLE RESPONSE. CAROUSEL LAYOUT. RANDOMISE ROWS**

1. Monitor the temperature settings on appliances or equipment to be more energy efficient, and change settings if necessary
2. Regularly switch off lighting and appliances when not in use

3. Make a conscious effort to use appliances or equipment less frequently
4. Switch the times you use appliances, hot water etc. equipment to off-peak times

**ASK IF dTYPE=1 (Consumer sample)**

D13 Which of the following best describes your household's situation?

**COMPULSORY. SINGLE RESPONSE**

1. Live in your own home
2. Rent
98. Other

**ASK IF dTYPE=1 (Consumer sample)**

C8 How strongly do you support or oppose the following?

1. Strongly support
2. Somewhat support
3. Neither support nor oppose
4. Somewhat oppose
5. Strongly oppose
6. Unsure

**COMPULSORY. SINGLE RESPONSE. CAROUSEL LAYOUT. RANDOMISE ROWS**

1. Introducing a mandatory labelling scheme for all houses, where all houses would have to have a current energy efficiency rating
2. Increasing minimum standards for energy efficiency for rental properties, to ensure that they meet basic energy efficiency standards.

**ASK IF dTYPE=1 (Consumer sample)**

C9 As you may be aware, fuel economy labels on new vehicles include estimates of how much fuel a typical driver would use in that vehicle each year, and therefore the approximate annual cost of fuel for that vehicle.

The same could be introduced for houses (including apartments & units), where every house could be given a label showing how much energy the home would be expected to use in a year, and therefore an estimated energy costs.



How strongly do you agree or disagree with the following...?

1. Strongly agree
2. Somewhat agree
3. Neither agree nor disagree
4. Somewhat disagree
5. Strongly disagree

**COMPULSORY. SINGLE RESPONSE GRID.  
RANDOMISE ROWS**

1. The house I live in at the moment would probably have a low energy efficiency rating
2. **[ASK IF D13=1 (Participants who live in their own home)]** If I found out that my home had a low energy efficiency rating, I would try to improve it
3. If I was deciding whether or not to buy a house, the energy efficiency rating would be a big factor I'd consider
4. **[ASK IF D13=2 (Participants who are renting)]** If I was deciding whether or not to rent a house, the energy efficiency rating would be a big factor I'd consider
5. Home energy efficiency ratings would make managing my energy costs easier

**ASK ALL**

- C4 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?

**COMPULSORY. OPEN-ENDED VERBATIM BOX**

**ASK ALL. NO BACK BUTTON OPTION AT THIS QUESTION**

- C5 How familiar are you with an organisation called the Energy Ombudsman, which assists consumers with complaints about energy?

**COMPULSORY. SINGLE RESPONSE**

1. Very familiar
2. Familiar
3. Not very familiar
4. Not at all familiar
5. Don't know

**ASK ALL**

- C6 How familiar are you with an organisation called Energy Consumers Australia?

**COMPULSORY. SINGLE RESPONSE**

1. Very familiar
2. Familiar
3. Not very familiar
4. Not at all familiar
97. Don't know

## SECTION 8: DEMOGRAPHICS – HOUSEHOLD CONSUMERS

**IF dTYPE=1 (Consumer sample) ASK D1 to D18**

**IF dTYPE=2 (Business sample) ASK B1 to B4**

**IF U2/1=1 (Participant has natural gas)**

- D1 Do you get separate bills for electricity and gas?

**COMPULSORY. SINGLE RESPONSE**

1. Yes
2. No

**IF U2/1=2 OR D1=1 (Participant does not have natural gas, or they have natural gas and get separate bills for electricity and gas)**

- D2 Approximately how much was your most recent bill for electricity?

**COMPULSORY. SINGLE RESPONSE**

1. Less than \$100
2. \$100 to \$199
3. \$200 to \$299
4. \$300 to \$399
5. \$400 to \$499
6. \$500 to \$599
7. \$600 to \$699
8. \$700 to \$799
9. \$800 to \$899
10. \$900 to \$999
11. \$1,000 or more
97. Don't know
96. Prefer not to say



**IF U2/1=2 OR D1=1 (Participant does not have natural gas, or they have natural gas and get separate bills for electricity and gas)**

D3 How many months did that bill cover?

**COMPULSORY. SINGLE RESPONSE**

1. One month
2. Two months
3. Three months
4. Other
5. Unsure

**IF D1=1 (Participant has natural gas and gets separate bills for electricity and gas)**

D4 Approximately how much was your most recent bill for gas?

**COMPULSORY. SINGLE RESPONSE**

1. Less than \$100
2. \$100 to \$199
3. \$200 to \$299
4. \$300 to \$399
5. \$400 to \$499
6. \$500 to \$599
7. \$600 to \$699
8. \$700 to \$799
9. \$800 to \$899
10. \$900 to \$999
11. \$1,000 or more
97. Don't know
96. Prefer not to say

**IF D1=1 (Participant has natural gas and gets separate bills for electricity and gas)**

D5 How many months did that bill cover?

**COMPULSORY. SINGLE RESPONSE**

1. One month
2. Two months
3. Three months
4. Other
5. Unsure

**IF D1=2 (Participant has natural gas and does not get separate bills for electricity and gas)**

D6 Approximately how much was your most recent bill for electricity and gas?

**COMPULSORY. SINGLE RESPONSE**

1. Less than \$100
2. \$100 to \$199
3. \$200 to \$299
4. \$300 to \$399
5. \$400 to \$499
6. \$500 to \$599
7. \$600 to \$699
8. \$700 to \$799
9. \$800 to \$899
10. \$900 to \$999
11. \$1,000 or more
97. Don't know
96. Prefer not to say

**IF D1=2 (Participant has natural gas and does not get separate bills for electricity and gas)**

D7 How many months did that bill cover?

**COMPULSORY. SINGLE RESPONSE**

1. One month
2. Two months
3. Three months
4. Other
5. Unsure

**ASK ALL FOR DTYPE=1 (Consumer sample)**

D8 Which if any of the following apply to you?

1. Yes
2. No

**COMPULSORY. SINGLE RESPONSE. CAROUSEL LAYOUT. RANDOMISED.**

1. I recently had an electricity or gas bill that was much larger than I expected
2. Electricity and gas bills put a lot of pressure on our household finances

[Yes / no]

**ASK IF DTYPE=1 (Consumer sample)**

D19a An earlier question asked whether or not you were considering making changes to reduce your electricity usage, such as changing the times when you use appliances or monitoring the temperature of air conditioning etc. more



closely.

Would a **5% increase** in the cost of electricity make any difference to your electricity usage?

**COMPULSORY. SINGLE RESPONSE**

1. Wouldn't make a difference
2. Would consider reducing usage
3. Would definitely reduce usage

**ASK IF D19a=1 OR D19a=2 (Previous increase wouldn't make difference or consider making difference to electricity usage)**

D19b And would a **10% increase** in the cost of electricity make any difference to your electricity usage?

**COMPULSORY. SINGLE RESPONSE**

1. Wouldn't make a difference
2. Would consider reducing usage
3. Would definitely reduce usage

**ASK IF D19b=1 OR D19b=2 (Previous increase wouldn't make difference or consider making difference to electricity usage)**

D19c And would a **15% increase** in the cost of electricity make any difference to your electricity usage?

**COMPULSORY. SINGLE RESPONSE**

1. Wouldn't make a difference
2. Would consider reducing usage
3. Would definitely reduce usage

**ASK IF D19c=1 OR D19c=2 (Previous increase wouldn't make difference or consider making difference to electricity usage)**

D19d And would a **20% increase** in the cost of electricity make any difference to your electricity usage?

**COMPULSORY. SINGLE RESPONSE**

1. Wouldn't make a difference
2. Would consider reducing usage
3. Would definitely reduce usage

**ASK IF D19d=1 OR D19d=2 (Previous increase wouldn't**

**make difference or consider making difference to electricity usage)**

D19e And would a **25% increase** in the cost of electricity make any difference to your electricity usage?

**COMPULSORY. SINGLE RESPONSE**

1. Wouldn't make a difference
2. Would consider reducing usage
3. Would definitely reduce usage

**ASK IF dTYPE=1 (Consumer sample)**

D9 What is your annual household income?

(This is the total of all wages/salaries, government benefits, pensions, allowances and other income that your household usually receives. GROSS – before tax and superannuation deductions)

**COMPULSORY. SINGLE RESPONSE**

1. Less than \$20,000
2. \$20,000 to under \$40,000
3. \$40,001 to under \$60,000
4. \$60,001 to under \$80,000
5. \$80,001 to under \$100,000
6. \$100,001 to under \$120,000
7. \$120,001 to under \$150,000
8. \$150,001 or more
97. Don't know
96. Prefer not to say

**ASK IF dTYPE=1 (Consumer sample)**

D10 What is the highest level of education you have completed?

**COMPULSORY. SINGLE RESPONSE**

1. Did not complete Year 12
2. Completed Year 12
3. Trade/TAFE
4. Diploma
5. University Degree

**ASK IF dTYPE=1 (Consumer sample)**

D11 Do you have dependent children under the age of 18?

**COMPULSORY. SINGLE RESPONSE**



1. Yes
2. No

**ASK IF dTYPE=1 (Consumer sample)**

D12 How many people live in your household?

Please type a number into the box below.

**COMPULSORY. NUMERIC ENTRY BOX. VALID RESPONSES 1 TO 19**

**ASK IF dTYPE=1 (Consumer sample)**

D14 Which of the following best describes where you live?

**COMPULSORY. SINGLE RESPONSE**

1. A house (i.e. a dwelling which is physically separated from any other dwelling)
2. A townhouse or duplex
3. A unit, flat or apartment
4. Other (specify)
98. Unsure

**ASK IF dTYPE=1 (Consumer sample)**

D14A How long have you lived there?

**COMPULSORY. SINGLE RESPONSE**

1. Less than 1 year
2. 1 or 2 years
3. 3 or 4 years
4. 5 years or more
98. Unsure

**ASK IF dTYPE=1 (Consumer sample)**

D15 Which decade was your home built in?

**COMPULSORY. SINGLE RESPONSE**

1. 1970s or earlier
2. 1980s
3. 1990s
4. 2000s
5. 2010s
98. Unsure

**ASK IF dTYPE=1 (Consumer sample)**

D16 Which of the following best describes how you feel about your current financial situation?

**COMPULSORY. SINGLE RESPONSE**

1. I am financially comfortable
2. I can manage household bills but struggle to afford anything extra
3. I feel under financial pressure.

**ASK IF dTYPE=1 (Consumer sample)**

D17 Which, if any, of the following apply to you?

1. Yes
2. No
97. Don't know
96. I'd rather not say

**COMPULSORY. SINGLE RESPONSE GRID. RANDOMISE ROWS**

1. My household receives a concession, government rebate or other assistance with energy bills
2. I have special payment arrangements with my electricity retailer as a result of financial hardship

**ASK IF dTYPE=1 (Consumer sample)**

D18 Do you speak a language other than English at home?

**COMPULSORY. SINGLE RESPONSE**

1. No, English only
2. Yes
9. Prefer not to say

**SECTION 9: DEMOGRAPHICS – BUSINESS CONSUMERS**

**IF dTYPE=1 (Consumer sample) ASK D1 to D18**

**IF dTYPE=2 (Business sample) ASK B1 to B4**



**ASK IF dTYPE=2 AND U1=2 (Business sample and working from another fixed location)**

**ASK IF U3/1=1 (Participant uses natural gas in business)**

B1 Do you get separate bills for electricity and gas?

**COMPULSORY. SINGLE RESPONSE**

1. Yes
2. No

**ASK IF dTYPE=2 AND U1=2 (Business sample and working from another fixed location)**

**ASK IF U3/1=2 OR B1 (Participant does not use natural gas in business or they have natural gas and get separate bills for electricity and gas)**

B2 Approximately how much was your most recent bill for electricity?

**COMPULSORY. SINGLE RESPONSE**

1. Less than \$1,000
2. \$1,000 to \$1,499
3. \$1,500 to \$1,999
4. \$2,000 to \$2,999
5. \$3,000 to \$3,999
6. \$4,000 to \$4,999
7. \$7,000 to \$7,499
8. \$7,500 to \$9,999
9. \$10,000 or more
97. Don't know
96. Prefer not to say

**ASK IF dTYPE=2 AND U1=2 (Business sample and working from another fixed location)**

**ASK IF U3/1=2 OR B1 (Participant does not use natural gas in business or they have natural gas and get separate bills for electricity and gas)**

B3 How many months did that bill cover?

**COMPULSORY. SINGLE RESPONSE**

1. One month
2. Two months
3. Three months
4. Other
5. Unsure

**ASK IF dTYPE=2 AND U1=2 (Business sample and working from another fixed location)**

**ASK IF B1=1 (Participant has natural gas and gets separate bills for electricity and gas)**

B4 Approximately how much was your most recent bill for gas?

**COMPULSORY. SINGLE RESPONSE**

1. Less than \$1,000
2. \$1,000 to \$1,499
3. \$1,500 to \$1,999
4. \$2,000 to \$2,999
5. \$3,000 to \$3,999
6. \$4,000 to \$4,999
7. \$7,000 to \$7,499
8. \$7,500 to \$9,999
9. \$10,000 or more
97. Don't know
96. Prefer not to say

**ASK IF dTYPE=2 AND U1=2 (Business sample and working from another fixed location)**

**ASK IF B1=1 (Participant has natural gas and gets separate bills for electricity and gas)**

B5 How many months did that bill cover?

**COMPULSORY. SINGLE RESPONSE**

1. One month
2. Two months
3. Three months
4. Other
5. Unsure

**ASK IF dTYPE=2 AND U1=2 (Business sample and working from another fixed location)**

**ASK IF B1=2 (Participant has natural gas but does not get separate bills for electricity and gas)**

B6 Approximately how much was your most recent bill for electricity and gas?

**COMPULSORY. SINGLE RESPONSE**

1. Less than \$1,000
2. \$1,000 to \$1,499
3. \$1,500 to \$1,999
4. \$2,000 to \$2,999
5. \$3,000 to \$3,999
6. \$4,000 to \$4,999
7. \$7,000 to \$7,499
8. \$7,500 to \$9,999
9. \$10,000 or more
97. Don't know
96. Prefer not to say





**ASK IF dTYPE=2 AND U1=2 (Business sample and working from another fixed location)**

**ASK IF B1=2 (Participant has natural gas but does not get separate bills for electricity and gas)**

B7 How many months did that bill cover?

**COMPULSORY. SINGLE RESPONSE**

1. One month
2. Two months
3. Three months
4. Other
5. Unsure

**ASK IF dTYPE=2 (Business sample)**

B8 Which of the following categories does your business fall into?

**COMPULSORY. SINGLE RESPONSE**

1. Construction
2. Professional, Scientific
3. IT and Technical Services
4. Rental, Hiring and Real Estate Services
5. Agriculture, Forestry and Fishing
6. Financial and insurance services
7. Retail trade
8. Transport, postal and warehousing
9. Health care and social support
10. Manufacturing
11. Accommodation and food/beverage services
12. Wholesale trade
98. Other

**ASK IF U1=2 (Business sample and working from fixed location)**

B9 Do you own or lease the primary premises from where your business operates?

**COMPULSORY. SINGLE RESPONSE**

1. Lease
2. Own
98. Other

**ASK IF U1=2 (Business sample and working from fixed location)**

B10 Which of the following best describes your general hours of operation?

**COMPULSORY. SINGLE RESPONSE**

1. 9am to 5pm
2. After 5pm – 12pm
3. 24 hours
98. Other

**ASK IF dTYPE=2 (Business sample)**

B18 Do you speak a language other than English at home?

**COMPULSORY. SINGLE RESPONSE**

1. No, English only
2. Yes
- 3.
9. Prefer not to say

## SECTION 10: CLOSING QUESTIONS

**SHOW ALL INFOS**

Thank you for participating in this survey, which is conducted on behalf of Energy Consumers Australia, an independent organisation created by the Council of Australian Governments to give residential and small business energy consumers a national voice in the energy market. They work to promote the long-term interests of residential and small business energy consumers with respect to price, quality, safety, reliability and security. Previous findings from this survey can be found at <http://energyconsumersaustralia.com.au/projects/consumer-sentiment-survey/>

**ASK ALL**

L1 As you may be aware, every home and business premises has a unique National Meter Identifier (NMI). By matching NMIs with the information people give in this survey, Energy Consumers Australia could provide much more detailed analysis, such as exploring how people's bills relate to their views on the energy market.

Energy Consumers Australia would like participants in this survey to provide their NMI numbers. Please note that providing this number is voluntary, and you will still receive your standard incentive even if you do not provide it. You should also be aware that your NMI number is **unique** – although Energy



Consumers Australia has agreed not to use that information in a way that means your household or business could be identified, it would still be possible to do so.

If you provide the number, it will be used only for research purposes, and you will not receive sales calls as a result.

If you would like to help Energy Consumers Australia by providing your NMI, you can find it on your electricity bill. It is an eleven digit number, which is usually on the first or second page of your bill. An example of where to find it can be found is at <https://www.energymadeeasy.gov.au/help/electricity-bill>

Please record the NMI number or select 'Prefer not to say' if you do not want to do it.

**NUMERIC ENTRY BOX. INCLUDE PREFER NOT TO SAY OPTION**

**SHOW ALL  
INFO6**

**Note that the next question will ask about your gas bill (if you have one), so if you have to look for your electricity bill now, you might like to look for your gas bill at the same time.**

**PREFER NOT TO SAY LINK DIRECTS TO L3**

**ASK IF U2/1=1 OR U2/2=1 OR U2/9=1 OR U3/1=1 OR U3/2=1 OR U3/9=1 AND L1≠'SKIP TO END' (Participant has mains gas, LPG or gas central heating and didn't skip NMI)**

L2 Lastly, Energy Consumers Australia are hoping that participants who have gas will also provide their Meter Installation Reference Number (MIRN).

Again, please note that providing this number is voluntary, and you will still receive your standard incentive even if you do not provide it. Like the NMI number, your MIRN number is unique - although Energy Consumers Australia has agreed not to use that information in a way that means your household or business could be identified, it would still be possible to do so.

If you would like to help Energy Consumers Australia by providing your MIRN, you can find it on your gas bill. It is typically on the last page and is usually a string of 10 characters.

**NUMERIC ENTRY BOX. INCLUDE SKIP TO THE END OPTION**

**SKIP TO THE END LINK DIRECTS TO L3**

**ASK ALL**

L3 Do you have any final comments you would like to make about the matters discussed in this survey?

*Please type your answer into the box below*

**COMPULSORY. OPEN-ENDED VERBATIM BOX**

